

A BIGEYE 2023 STUDY

# National Pet Owners Study

bigeye



# Foreword

**In recent years, the evolution of pet food, products, and services has reflected consumer trends - providing more personalized, unique, and humanized experiences.**

In 2023, the total spending on pet-related products and services in the United States is projected to exceed \$100 billion. This represents an eye-popping increase of \$25 billion since Bigeye's last report on pet ownership, which we published in the fall of 2019.

This increase is not due to inflation alone; Americans care for more pets today than in 2019. In that year, the percentage of US households that owned one or more pets was 67 percent - or an estimated 85 million households. In 2023, approximately three-quarters of households in the United States own one or more pets (75%).

Owners now have access to abundant products and services that cater to their pets' needs. Today, visiting a pet supermarket or retailer's website means encountering an almost overwhelming assortment of pet foods, supplements, apparel, accessories, pet-focused medical care, and in some locations, even spa treatments.

It's been Bigeye's privilege to work with clients in the pet vertical for over two decades, and during that time, we've witnessed many changes. The numbers in this latest report clearly illustrate the popularity of pets in America, and why we have come to consider them as family members.

With more people owning pets than ever, the upward trajectory of pet-related spending we've tracked since 2019 can be expected to continue in the coming years - and, with it, new opportunities for brands and marketers.

So, whether you're an established brand or a new entrant in the category, it's my pleasure to share the information in this report. I hope you'll be inspired by our insights about owners and their pets in America today.

**Justin Ramb**

President and CEO, Bigeye



# Introduction

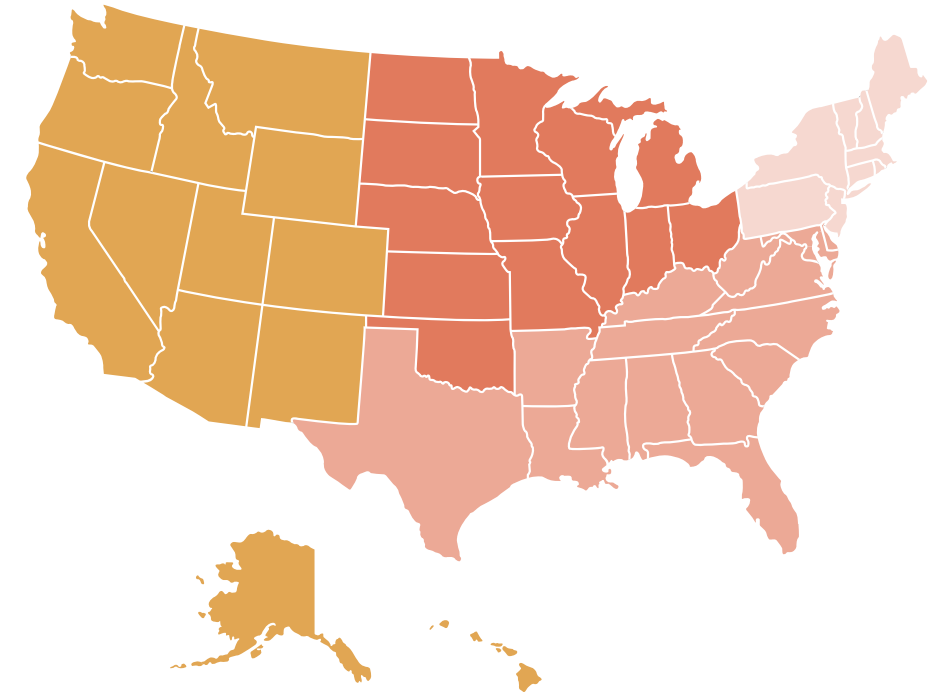
Welcome to Bigeye’s 2023 National Pet Owners Study focusing on the purchasing behaviors and attitudes of pet owners across the United States.

The research data in this report was collected by Bigeye in late summer, 2022, from a sample of 1,001 US adults across the United States. Screened for pet ownership, buying responsibility, and an age range from 18 to 57, all respondents completed an online questionnaire.

Bigeye’s sample reflected the US population’s geographic distribution and demographic characteristics. For reporting purposes, we grouped respondents into four geographic regions shown in the accompanying visualization: Northeast (18%), South (44%), Midwest (19%), and West (19%).

Special thanks to Dr. Andrea Laurent-Simpson of Southern Methodist University in Dallas, Texas, for first introducing us to the concept of the multi-species family in her book, *Just Like Family: How Companion Animals Joined the Household*. Dr. Laurent-Simpson’s groundbreaking work illustrates how dogs and cats are thought of as actual family members, and often given familial identities, such as child, sibling, or “fur baby.” Dr. Laurent-Simpson also reviewed and made recommendations for Bigeye’s survey, and kindly participated in the podcast accompanying this report.

**Adrian Tennant**  
Chief Strategy Officer, Bigeye



**KEY**

- WEST**  
 California, Arizona, Washington, Colorado, Utah, Nevada, Oregon, New Mexico, Hawaii, Montana, Wyoming, Idaho, Alaska
- NORTHEAST**  
 New York, Pennsylvania, Massachusetts, New Jersey, Connecticut, Maine, New Hampshire, Rhode Island, Vermont, Washington D.C.
- MIDWEST**  
 Michigan, Ohio, Illinois, Missouri, Indiana, Wisconsin, Minnesota, Iowa, Kansas, Nebraska, Oklahoma, North Dakota, South Dakota
- SOUTH**  
 Texas, Florida, North Carolina, Georgia, Tennessee, Virginia, Maryland, Alabama, Kentucky, South Carolina, Louisiana, West Virginia, Arkansas, Mississippi, Delaware



# 01

## Pet Ownership

Nearly one-half of pet owners in Bigeye's study welcomed a new furry friend into their family during the COVID-19 pandemic (48%). In the first section of the report, we look at where those pets came from, learn what owners see as the main benefits of owning pets, and identify which types of pets are the most popular.

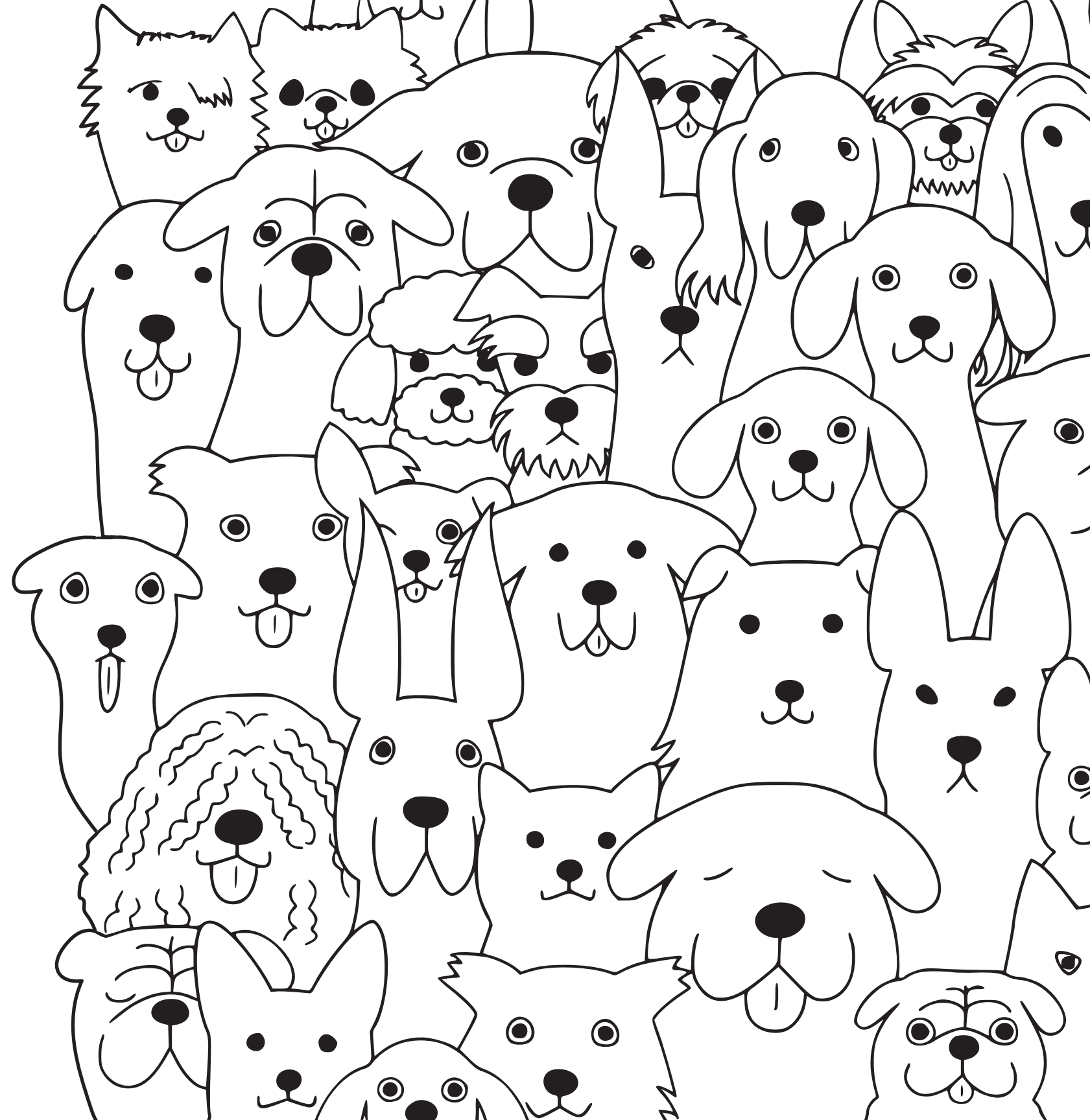
# New Pets During COVID-19

**Almost one-half of owners welcomed a new pet into their household during the pandemic (48%)**

The COVID-19 pandemic saw a surge in the number of pets adopted during a period when people were acutely affected by lockdowns and social distancing. In Bigeye's study, Gen Z owners are the most likely to have welcomed a new pet, with well over one-half reporting that they had done so (54%), compared with 49 percent of Gen Y, and 2-in-5 Gen X owners (40%). Households with cats are slightly more likely, at 53 percent, than those with dogs (49%). Overall, male owners are 10 points more likely to have acquired a new pet (55%) than females (45%). One-half of those working full-time and part-time welcomed a new pet during this period (both 50%), with students more likely to have done so (63%), and retirees almost 20 points less likely (44%).

## QUESTION 16

Did you welcome a new pet into your household during the COVID-19 pandemic? *n*=1,001





## New Pet Source

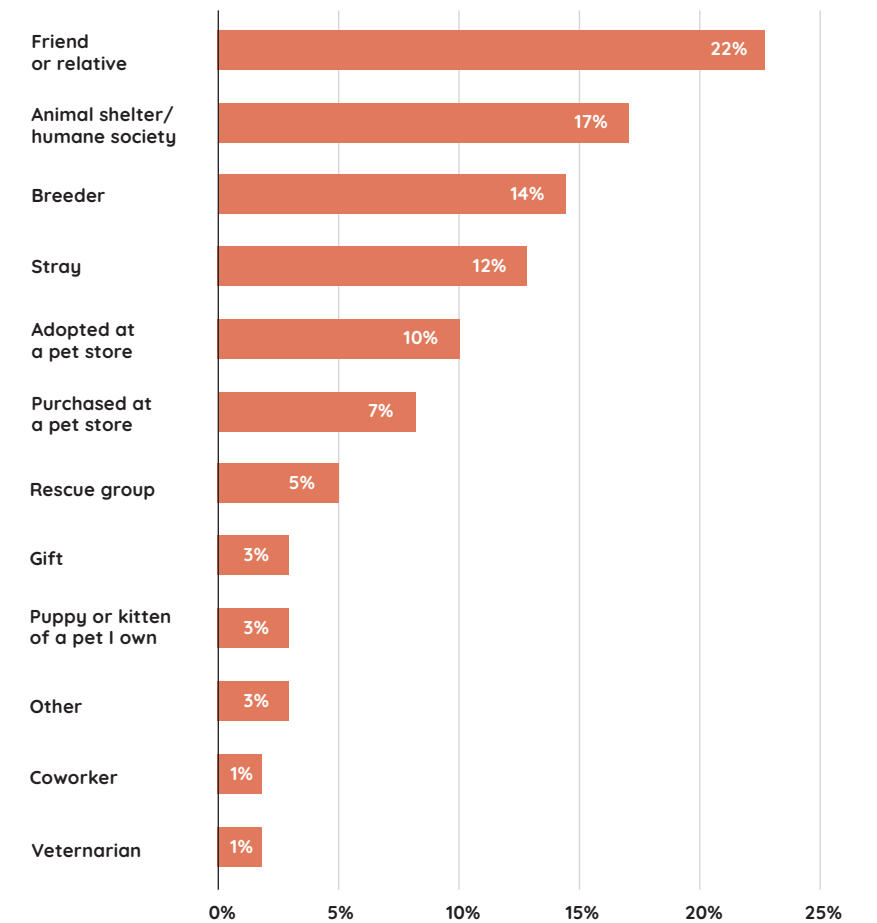
**Over one-fifth of pets most recently acquired came from a friend or relative (22%)**

Households with at least one cat or at least one dog are equally as likely as each other to report getting their pet from a friend or relative (23%). The second-most popular source for a pet is an animal shelter or humane society, with 17 percent selecting this. Cat owners are 4 points more likely than average to select a shelter (21%). Almost one-fifth of Gen Z respondents got their pet from a breeder (19%), making them the most likely cohort to do so - in contrast with 12 percent of Gen Y, and 11 percent of Gen X.

### QUESTION 17

Thinking about the pet you welcomed to your household most recently, where did you get them from? n=1,001

Thinking about the pet you welcomed to your household most recently, where did you get them from?



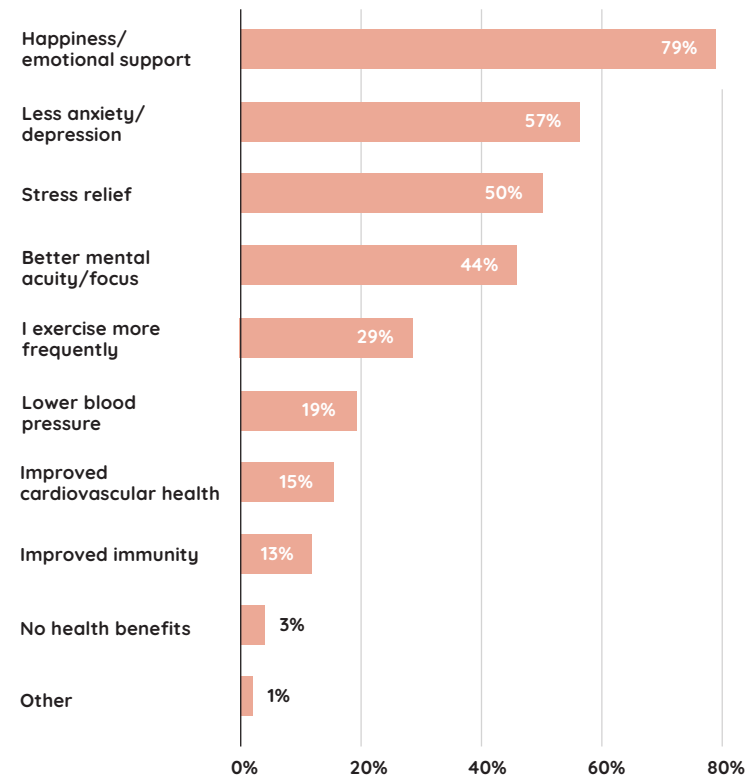
# Health Benefits

## Four-in-five owners say they gain happiness or emotional support from having a pet (79%)

The owners most likely to experience happiness and emotional support belong to Gen X - among whom 88 percent select this response. Owners identifying as female are 10 points more likely to say this (82%) than males (72%). Approaching 3-in-5 owners report that they experience less anxiety or depression from having a pet (57%), including a higher percentage of females (61%). Those living in rural areas are 18 points more likely to select this (61%) than those in urban areas (53%). One-half of all owners report having a pet helps relieve stress (50%) - this is most pronounced in single-person households (55%) and among those who live in rural areas (55%).

**Overall, owners identifying as female are more likely to select benefits related to mental health, including happiness, less anxiety, stress relief, and mental acuity. Male pet owners are more likely to select physical benefits such as exercising more frequently, improved cardiovascular health, lower blood pressure, and improved immunity.**

What are the specific health benefits, if any, you feel you gain from having a pet?



QUESTION 18

What are the specific health benefits, if any, you feel you gain from having a pet? Please select all that apply. n=1,001



## Single vs. Multiple Pets

**Among all owners, two-thirds have more than one pet in their households (66%)**

Gen Z and Gen Y owners are about equally likely to report having more than one pet (both 67%), while Gen X respondents are 3 points less likely (64%). Ownership of more than one pet is least likely in households without children (59%) and most likely in households that include 2 children aged under 18, among whom over three-quarters of owners have multiple pets (76%). Married owners are also more likely to report having multiple pets (73%) than single owners (58%).

### QUESTION 11

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Do you have more than one pet? *n*=1,001

## Reasons for Having Multiple Pets

**Over three-quarters of owners say they simply enjoy having multiple pets (77%)**

While dog and cat owners are about equally as likely to give this response, owners identifying as female are more likely (79%) than males (74%). Almost one-half of pet owners in households with more than one pet say they have multiple pets because they are companions for each other (49%). Cat owners are more likely to say that their pets are related, and they didn't want to separate them (20%) compared to dog owners (15%). Gen Z owners are more likely than average to report that having more than one pet results from being in a blended family, or moving in to live with someone else (12%).

### QUESTION 12

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Why do you have more than one pet? Please select all reasons that apply. *n*=657





# Types of Pets

**Over three-quarters of respondents own dogs (76%); more than one-half own cats (56%)**

Those most likely to own at least one dog belong to Gen Y (79%) compared to 77 percent among Gen Z, and 73% of Gen X. Respondents identifying as male are more likely to own a dog (82%) than females (74%). Those most likely to own at least one cat belong to Gen X (62%) compared to 52 percent among Gen Z, and 56% of Gen Y. Respondents identifying as female are more likely to own a cat (57%) than males (54%). Although a small sample, owners identifying as non-binary are 9 points more likely than average to own at least one cat (65%). Dogs are slightly less likely to be found in homes without children under age 18 (70%) than in those with one or two (84%), or with three children (88%).

## QUESTION 13

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Please indicate from the list below what type(s) of pet(s) you own. Select all that apply. *n*=1,001



# How Many Dogs

Among dog owners, most have one (39%) or two dogs (41%)



Among all pet owners, 39 percent have **1 dog**. This is the case for more than 2-in-5 Gen Y owners (44%), making them the most likely to have this number. In contrast, among dog owners who have no cats in their household, one-fifth have just one dog (20%). Those identifying as male are more likely to have 1 dog (48%) than females (35%).



Among all pet owners, 41 percent have **2 dogs**. Forty-three percent of Gen Z owners have 2 dogs in their household, 4 points more than Gen Y (39%). Among owners with no cats in their household, over one-half report having two dogs (54%). Females are more likely (43%) than males (35%) to have 2 dogs.



Among all pet owners, 11 percent have **3 dogs**. Fourteen percent of Gen Z owners have 3 dogs in their household, 6 points more than Gen Y (8%) and 3 points more than Gen X (11%). Females are slightly more likely (12%) than males (10%). Among dog owners with no cats in their household, 13 percent have 3 dogs.



Among all pet owners, 9 percent have **4 or more dogs**. Gen X owners are the most likely, at 11 percent. Among dog owners with no cats in their household, 13 percent have 4 or more dogs. Females are slightly more likely (10%) than males (7%) to have this number.

**QUESTION 14**

How many dogs are in your household? n=523

# How Many Cats

Among cat owners, most have one (38%) or two cats (34%)



Among all pet owners, approaching 2-in-5 have **1 cat** (38%). But among cat owners without any dogs in their household, fewer than one-tenth have one cat (8%). Those identifying as male are more likely to have 1 cat (54%) than females (33%).



Among all pet owners, a little over one-third have **2 cats** (34%). Two-in-five of Gen Z owners have 2 cats in their household (40%), 5 points more than Gen Y (35%), and 12 points more than Gen X (28%). Females are equally likely as males to have 2 cats (both 34%).



Among all pet owners, 14 percent have **3 cats**. Sixteen percent of Gen X owners have 3 cats in their household, 2 points more than Gen Y (14%) and 5 points more than Gen Z (11%). Among owners with no dogs in their household, approaching one-quarter have 3 cats (24%).



Among all pet owners, 14 percent have **4 or more cats**. Gen X owners are the most likely, at 17 percent. Among owners with no dogs in their household, 15 percent have 4 or more cats. Females are the most likely, at 15 percent, compared to just 1 percent of males in our sample to have this number.

**QUESTION 15**

How many cats are in your household? n=459

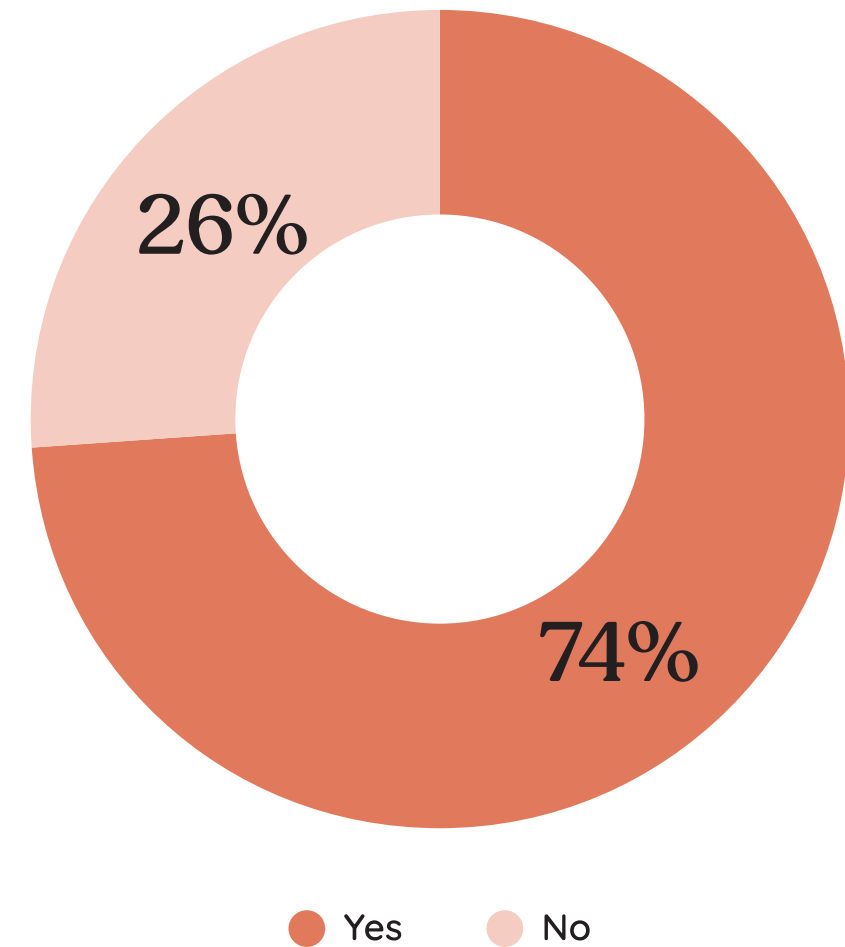
# Spayed/Neutered

**Almost three-quarters of US owners say their pets are spayed or neutered (74%)**

At 64 percent, dogs in households without cats are about 10 points less likely than average to say their pets are spayed or neutered. Owners of dogs in households without cats, living in rural areas, are significantly less likely to say their pets are spayed or neutered (54%) - 20 points less than average. Over 4-in-5 owners of cats, with no dogs in the household, report their pets are spayed or neutered (81%).



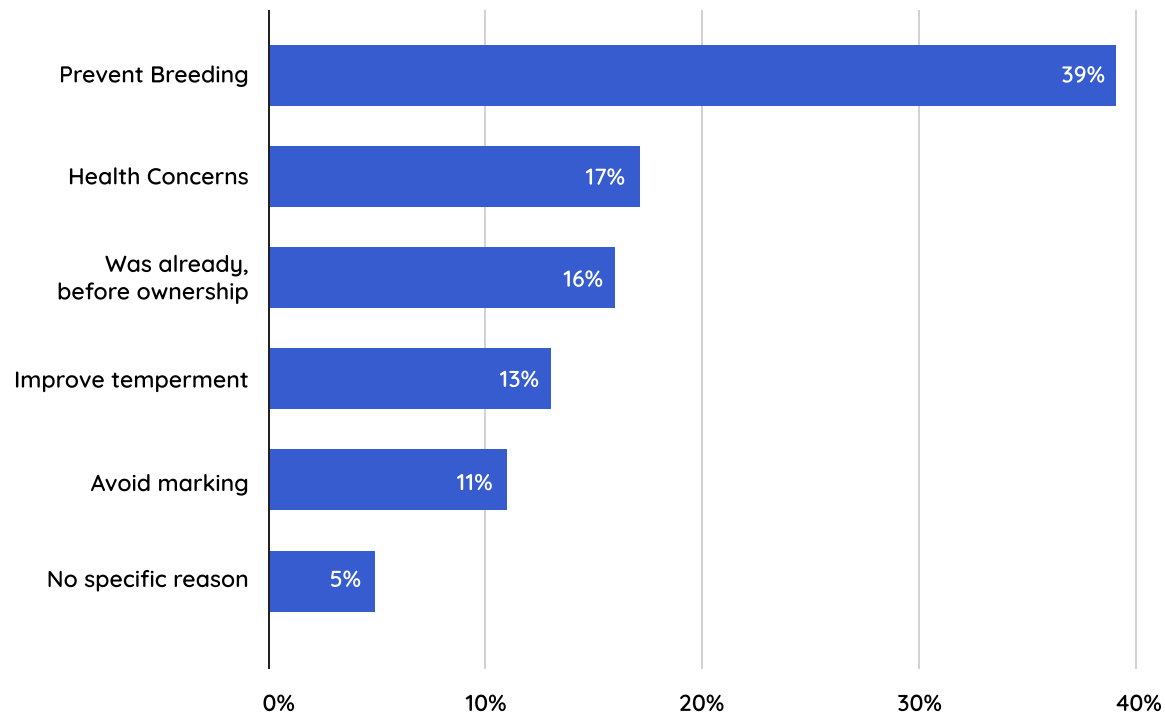
Is your pet(s) spayed/neutered?



**QUESTION 58**

Is your pet(s) spayed/neutered? n=1,001

What is the main reason they are spayed/neutered?



## Why and Why Not Spayed/Neutered

**The main reason owners give for their pets to be spayed or neutered is to prevent breeding (39%)**

Among those who indicated their pets are spayed or neutered, owners with multiple pets are more likely to select “to prevent breeding” (42%) than those with one pet (30%), as are owners identifying as female (42%) compared with 28 percent of males. Health concerns are the second most selected reason, with Gen Z owners most likely (20%) - 5 points higher than Gen Y (15%). In households with dogs but no cats, owners are slightly more likely to report their dogs were already spayed or neutered before ownership (21%) than owners of cats but no dogs (18%). And in households with dogs but no cats, owners in urban areas are 6 points more likely to report pets already spayed or neutered (25%) than owners in suburban or rural areas (both 19%).

**QUESTION 59**

What is the main reason they are spayed/neutered? n=742

# What Do These Statistics Reveal about the Perceived - And Real - Benefits of Pet Ownership?

There is a good deal of research to support the idea that companion animals support human health, mental health, and physical health in a number of ways. The CDC argues that bringing dogs and cats, in particular, into our households helps to bring on decreases in blood pressure, decreases in loneliness and anxiety, and even symptoms of PTSD. Triglyceride levels are likely to drop, as well as bad cholesterol levels. Dogs, in particular, bring on increased opportunities for exercise and outdoor activities that we may not otherwise be engaged in given the ways in which we live our lives: sitting in chairs working, and staring at screens all day long. But also for older adults, the CDC has highlighted particular benefits for older adults who are likely to experience isolation, and depression, and owning a pet leads to greater opportunities for our elderly to socialize.

**Dr. Andrea Laurent-Simpson**

IN CLEAR FOCUS Podcast





# 02

## Pet Owners' Purchasing Behaviors

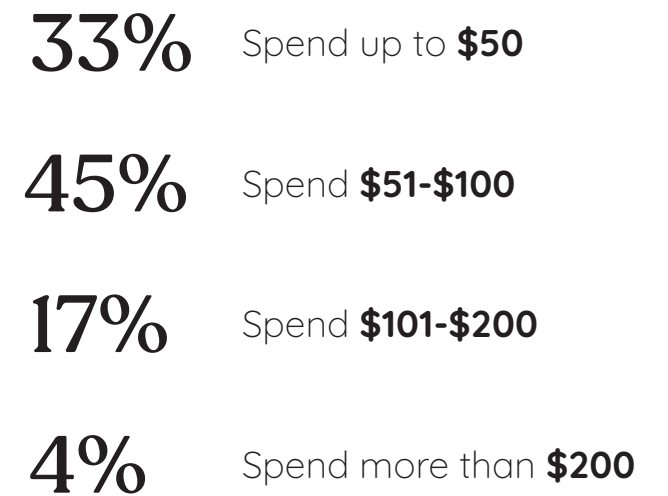
In this section of Bigeye's study, we examine pet owners' purchasing behaviors. We learn what owners' most important considerations are related to their pets' food, their ingredient preferences, and how brand loyal owners are. The survey charts how much owners spend per month on food, non-food items, and services for their pets. Data reveals how owners have been impacted by inflation, presenting some surprising insights.

# Pet Food: Monthly Spending

**More than 2-in-5 owners report spending \$51 to \$100 on their pets' food, per month (45%)**

**One-third of owners spend up to \$50 per month on their pets' food (33%).** Owners in the Midwest are the most likely (43%) compared to 28 percent of those in the Northeast. Female owners are 13 points more likely to spend up to \$50 monthly (37%) than males (24%). Over one-half of those with HHIs below \$25,000 per year spend \$0-\$50 per month (54%). More than one-half of owners in the Northeast spend \$51-\$100 per month on pet food (51%) as do owners with one child (54%). One-fifth of owners in the West spend \$101-\$200 per month on pet food (20%), and the most likely to do so. Owners of 4 or more dogs are the most likely to spend more than \$200 per month on their pets' food (15%). Owners with 4 or more children are more likely to spend more than \$200 per month on their pets' food (12%) than those with fewer kids. Almost one-quarter of those with annual household incomes of \$200,000 or more spend more than \$200 per month on their pets.

On average, how much do you spend on food for your pet(s) per month? If you're not sure, please select your best guess.



**QUESTION 39**

On average, how much do you spend on food for your pet(s) per month? If you're not sure, please select your best guess. n=1,001

When choosing food for your pet(s), which factors are important to you?

	#1	#2	#3	#4	#5	#6
Trusted/brand name	36%	24%	16%	16%	5%	3%
Nutritional/health benefits	32%	23%	26%	13%	4%	2%
Cost/value for money	17%	30%	23%	15%	7%	8%
Preferences of my pet(s)	12%	16%	22%	35%	10%	5%
Brand's values align with my own	2%	4%	6%	9%	22%	58%
Sustainable manufacturing process/limited carbon footprint	1%	4%	7%	12%	52%	23%

QUESTION 29

When choosing food for your pet(s), which factors are important to you? Please rank them, placing the most important at the top of the list. n=1,001

# Choosing Pet Food

When choosing food for their pets, owners' top consideration is whether it is a trusted, well-known brand (36%)

**Gen Z** pet owners are most likely to rank a trusted brand name as their top consideration (41%) than Millennials (34%) or Gen X owners (25%).

**Millennials** are most likely to rank cost/value for money as their top consideration when choosing food for their pets (38%), compared to 29% of Gen Z, and one-third of Gen X (33%). **Gen X** pet owners are more likely than other generations to rank nutritional/health benefits as their top consideration (38%), compared with Gen Z (29%) or Gen Y (33%). From the six factors, owners rank their pets' preferences fourth (35%), sustainable manufacturing fifth (52%), and a brand's values that align with their own, in sixth place (58%).

Considering six factors, pet owners rank their top 3 considerations as:

- #1: Trusted, well-known brands
- #2: Cost and value for money
- #3: Nutrition and health benefits.





## Pet Food Brand Loyalty

**Over two-thirds of all owners have always purchased the same brand of pet food since first welcoming their pet into their households (69%)**

Approaching three-quarters of Gen Z owners have always purchased the same brand of dog food (73%), making them the most brand-loyal generation. Over 7-in-10 owners in the South have always purchased the same brand of food for their pets, making them the most brand-loyal regionally (72%), nine points higher than those in the Northeast (63%) among whom approaching 2-in-5 have switched brands (37%). Owners identifying as male are 8 points more likely to be brand loyal (75%) than females (67%). Respondents reporting annual household incomes of below \$25,000 are also less likely to switch brands, with 71 percent saying they have always purchased the same brand of pet food. And it's not just low-income owners that exhibit this behavior - three-quarters of those with annual HHIs of \$80,000-\$99,999 are also brand loyal (75%).

# Pet Food Purchase Considerations

**Approaching three-quarters of pet owners indicate cruelty-free ingredients are extremely or somewhat important to them (72%)**

Over two-thirds of pet owners say all-natural ingredients are extremely or somewhat important to them (68%). Approaching two-thirds of pet owners believe it's important that the food they buy for their pets is manufactured in the USA (64%). Gen Z owners are most likely to consider recyclable packaging or containers important for pet food, with almost three-quarters selecting this option (74%). Grain-free ingredients are most important to owners in the West, where over one-half of owners select this (52%).

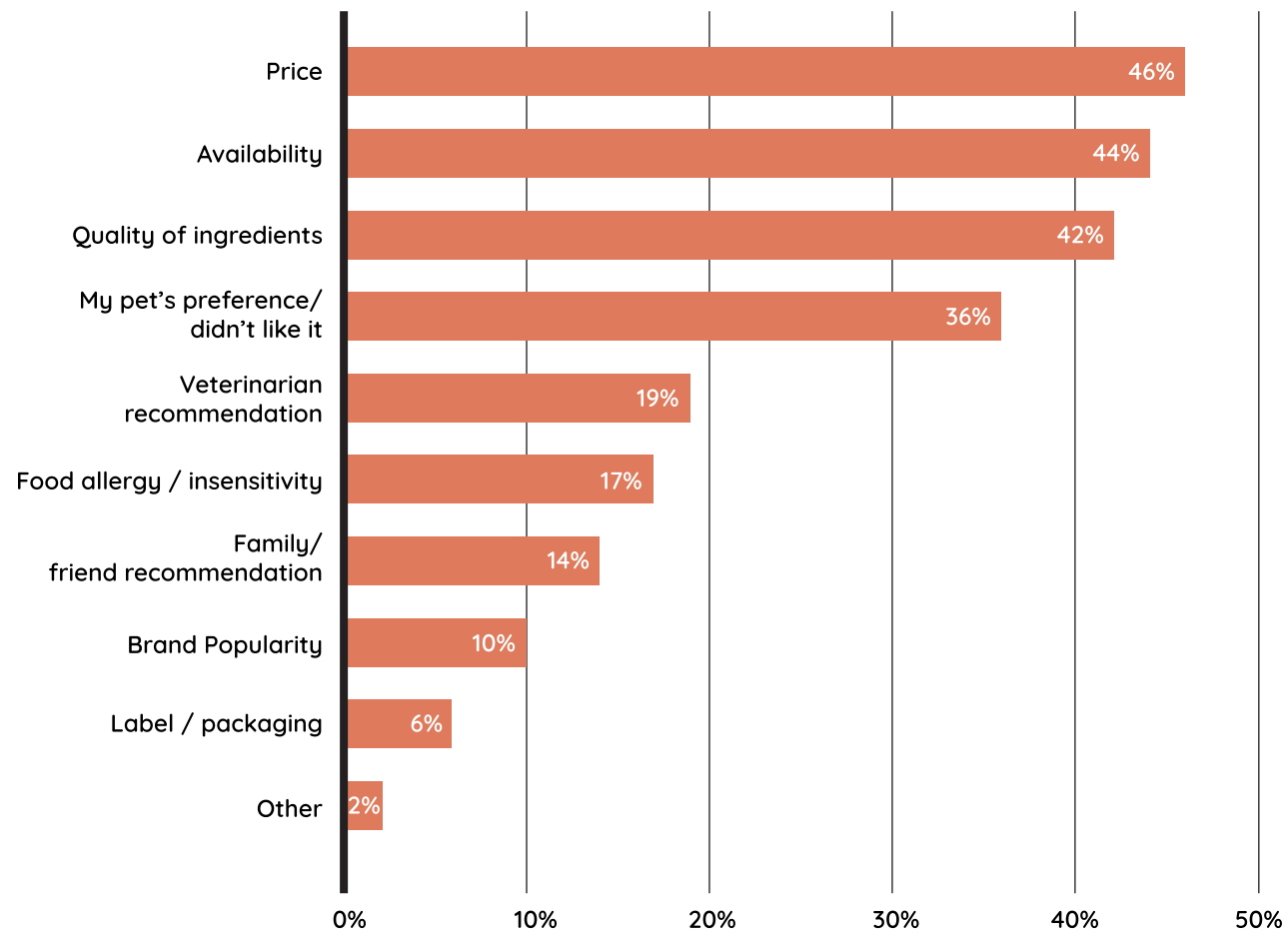
**QUESTION 34**

When considering which food to purchase for your pet(s), how important to you are the following ingredients, packaging, and manufacturing? *n*=1,001

**When considering which food to purchase for your pet(s), how important to you are the following ingredients, packaging, and manufacturing?**

	Extremely important	Somewhat important	Neutral	Somewhat unimportant	Extremely unimportant
Cruelty-free	49%	23%	20%	5%	3%
Made in the USA	36%	28%	26%	5%	5%
All-natural	35%	33%	23%	5%	4%
Non-GMO	29%	30%	30%	5%	6%
Sustainable packaging	29%	29%	30%	7%	5%
Salt-free	27%	27%	34%	7%	6%
Recyclable Packaging	25%	29%	32%	10%	6%
Grain-free	23%	23%	36%	10%	7%
Wheat-free	22%	24%	39%	10%	6%
Corn-free	22%	25%	37%	10%	7%

Which of the following, if any, are reasons why you have ever switched brands or tried a new brand?



## Pet Food Brand Switching

The top three reasons owners switch to or try new pet food brands are price (46%), availability (44%), and quality of ingredients (42%)

Among brand switchers, in households with cats, Gen Z owners are the most likely to identify price as a reason for trying a new brand (55%). In households with dogs, Gen Y owners are the most likely to do so (48%). Availability concerns those with annual household incomes below \$50,000 (51%). One-half of Gen Y cat owners who have switched food brands say they did so due to the quality of ingredients (50%). Gen X owners are the most likely to switch food brands based on their cats' preferences - among brand switchers, almost half report doing so (49%), and for Gen X dog owners, 39 percent select this. Gen Z dog owners are the most likely to switch food brands because of their pets' allergies - almost one-fifth of this generation report doing so (19%).

### QUESTION 35

Which of the following, if any, are reasons why you have ever switched brands or tried a new brand? Please select all that apply. n=311 (had switched brands)

# Product Name and Description Influence

**Three-in-five pet owners say they are much more or somewhat more likely to purchase pet food with “Advanced,” “Pro,” “Enhanced,” or “Balanced” in the name or description (60%)**

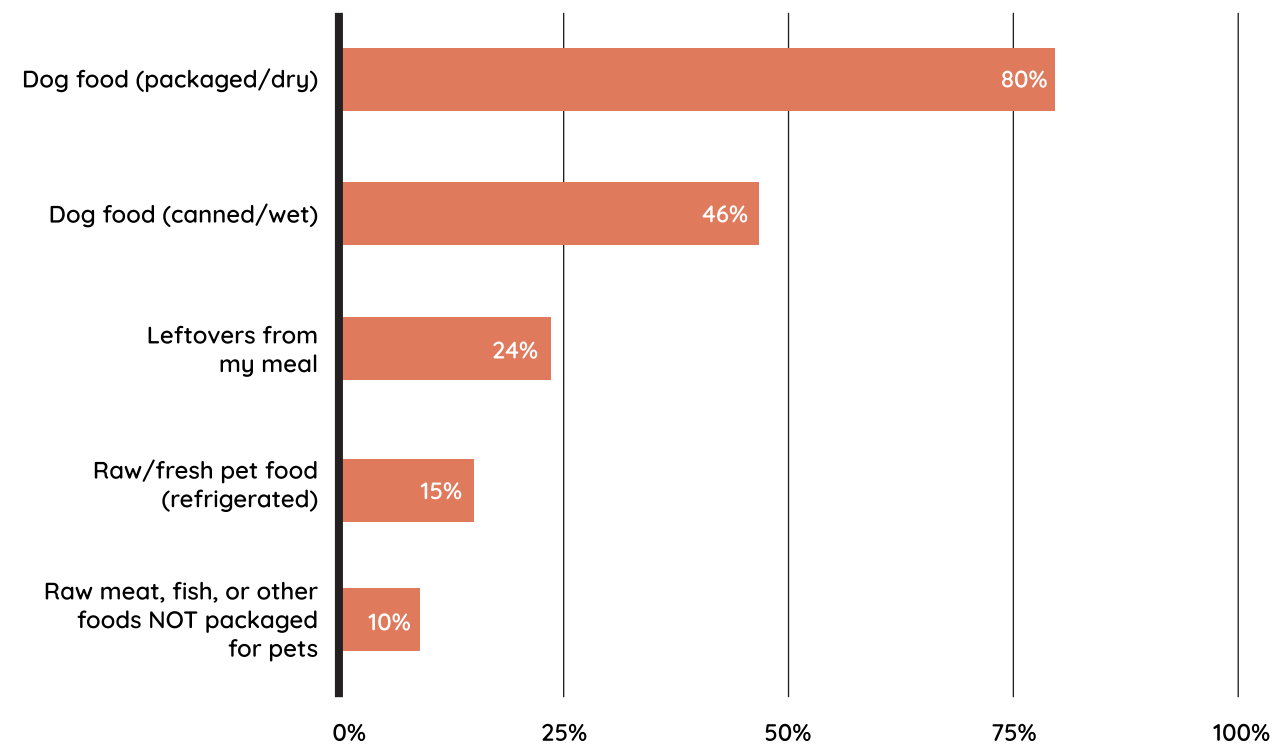
Around one-half of all cat owners without dogs in their household are more likely to purchase pet food with these terms in the product name and/or description (51%). More than 3-in-5 owners with dogs, but no cats, are likely to purchase pet food with “Advanced,” “Pro,” “Enhanced,” or “Balanced” in the product name and/or description (62%), making them among the most likely owners to do so. Gen X owners are the most likely to purchase pet food with these terms in the name or description (76%), 10 points more than Gen Z (66%).

## QUESTION 35

Typically, are you more or less likely to purchase pet food with “Advanced,” “Pro,” “Enhanced,” or “Balanced” in the product name and / or description? n=1,001



### Which type(s) of food do you give your pet?



**QUESTION 28**

Which type(s) of food do you give your pet? Please select all that apply. n=764

## Types of Food

Packaged/dry foods are the preferred types in households with cats (88%) and households with dogs (80%)

**QUESTION 28**

Which type(s) of food do you give your pet? Please select all that apply. n=1,001

## Types of Food for Dogs

In households with dogs, approaching one-half also feed wet/canned food (46%)

Just under one-quarter report feeding their pets leftovers from their meals (24%). Fifteen percent feed their pets raw/fresh pet food, while 10 percent feed them raw meat, fish, or other foods not packaged for pets.

**QUESTION 28**

Which type(s) of food do you give your pet? Please select all that apply. n=764

# Top 10 Dog Food Brands

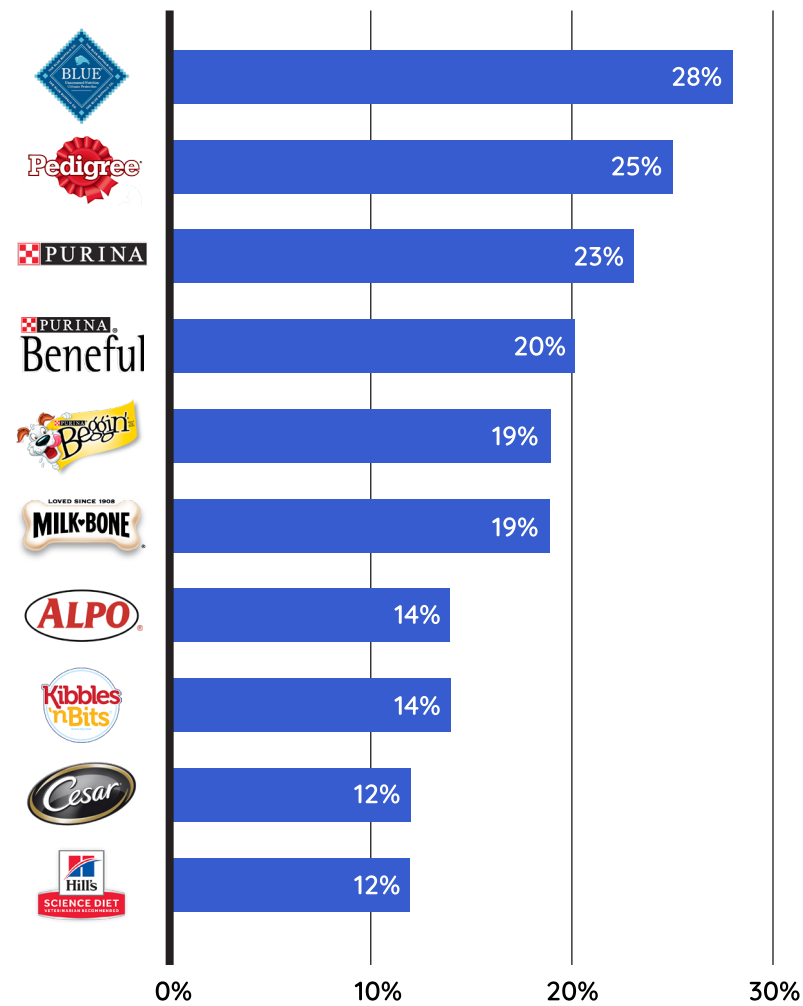
**Blue Buffalo (28%), Pedigree (25%), and Purina (23%) are the most popular brands of dog food**

Owners with dogs and cats give about the same number of brands to their dogs as households with dogs but no cats. The same 11 brands are selected by at least 10 percent of households with dogs and cats, and households with no cats. Blue Buffalo is the most popular dog food brand among Gen Z and Millennial owners (29%), but Gen X owners are 6 points more likely to select Pedigree (29%) than Blue Buffalo (23%). Gen Z owners overwhelmingly prefer Blue Buffalo (29%), 11 points more than the closest rivals Beneful (18%) and Milk-Bone (also 18%). In the Northeast, in households with dogs, 17 brands of dog food have achieved ten percent penetration or higher, compared with 13 brands in the South, 12 in the West, and 10 in the Midwest.

**QUESTION 33**

Which brand(s) of food do you give to your dog(s)? Please select all that apply. n=764

Which brand(s) of food do you give to your dog(s)?



# Types of Food for Cats

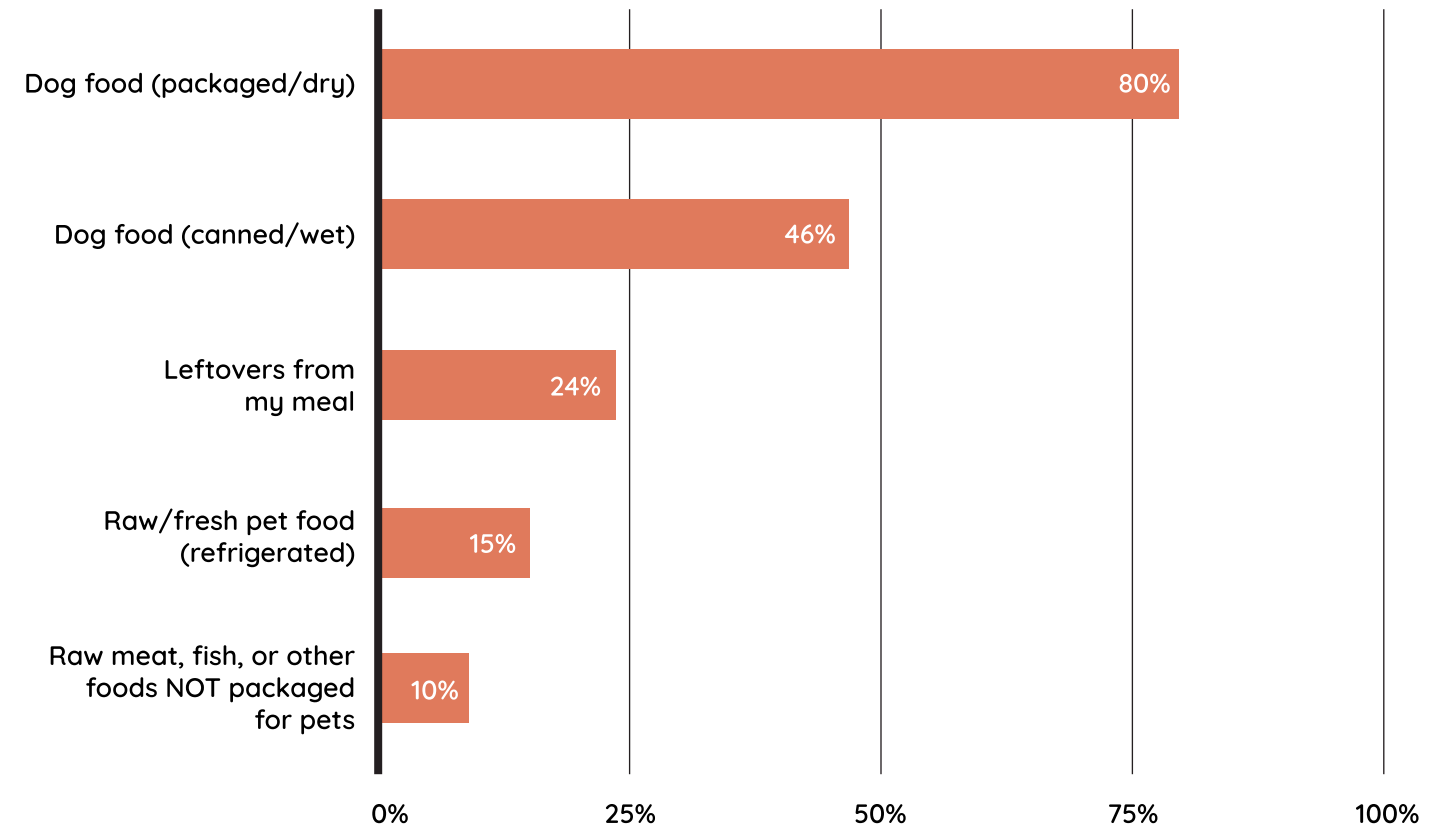
**In households with cats, approaching two-thirds also feed wet/canned food (64%)**

Fewer owners with cats report feeding their pets leftovers from their meals (17%) compared with dogs (24%). Eleven percent feed their pets raw/fresh pet food, while 8 percent feed them raw meat, fish, or other foods not packaged for pets.

**QUESTION 28**

Which type(s) of food do you give your pet? Please select all that apply. n=565

**Which type(s) of food do you give your pet?**



# Top 10 Cat Food Brands

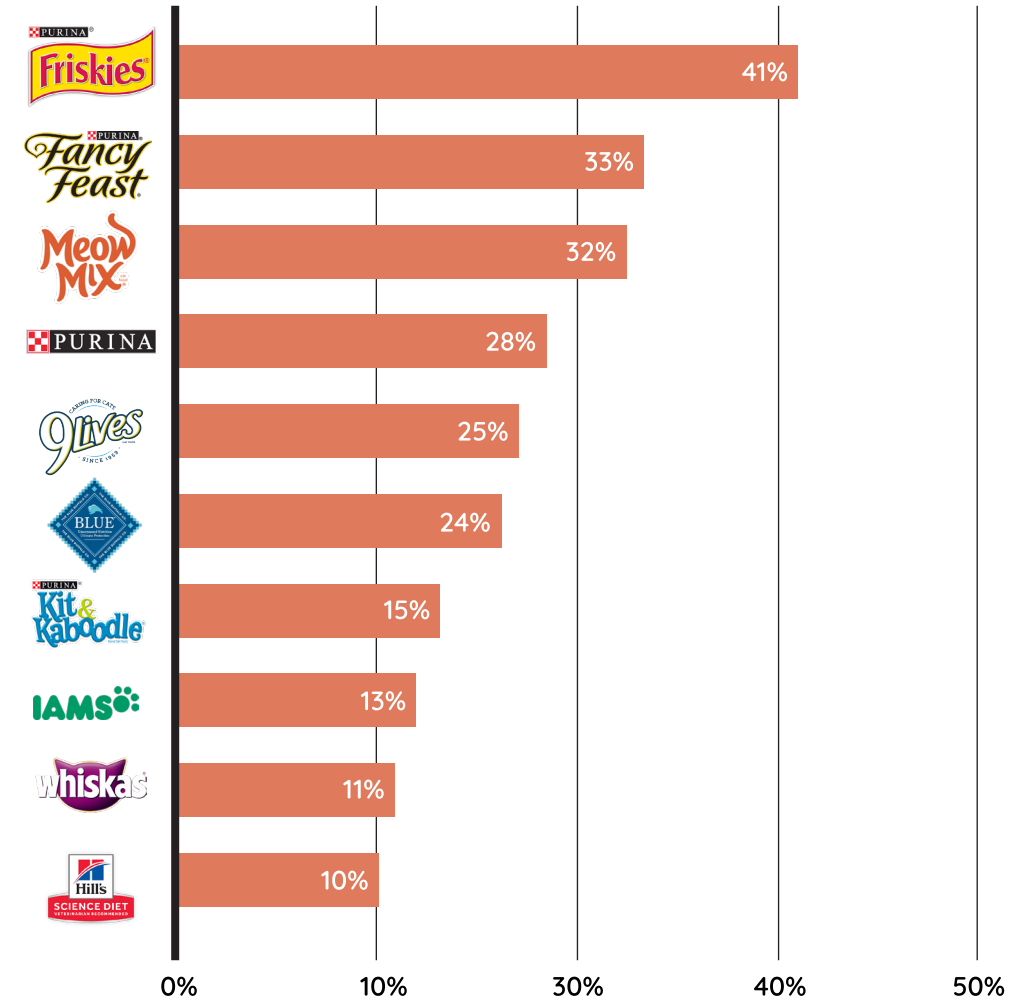
**Friskies (41%), Fancy Feast (32%), and Meow Mix (32%) are the most popular brands of cat food**

Owners with dogs and cats give a broader range of brands to their cats than households with cats but no dogs. Eleven brands are selected by at least 10 percent of households with dogs and cats, compared to seven selected by households with no dogs. Among Gen Z pet owners, the top 5 cat food brands are Friskies (38%), Meow Mix (31%), Blue Buffalo (28%), Fancy Feast (25%), and Purina (25%). Among Millennial pet owners, the top 5 cat food brands are Friskies (43%), Fancy Feast (36%), Meow Mix (32%), Purina (32%), and 9Lives (25%). Among Gen X pet owners, the top 5 cat food brands are Friskies (42%), Fancy Feast (34%), Meow Mix (32%), 9Lives (30%) and Purina (26%). Blue Buffalo appears in the top 5 for Gen Zers only (28%), compared to 25% among Millennials, and 18% among Gen X owners. In the South and Northeast, in households with cats, 13 brands of cat food have achieved ten percent penetration or higher, compared with 11 brands in the Midwest and 9 in the West.

**QUESTION 32**

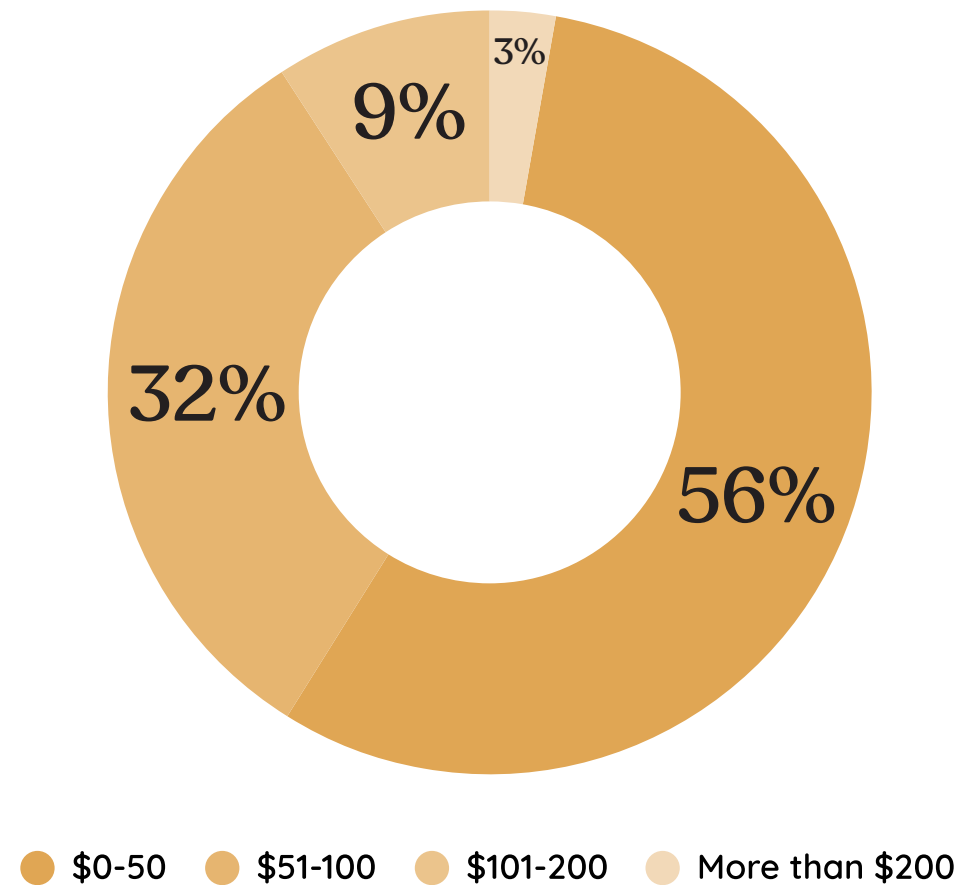
Which brand(s) of food do you give to your cat(s)? Please select all that apply. n=565

Which brand(s) of food do you give to your cat(s)?





On average, how much do you spend on non-food products for your pet(s) per month?



## Non-Food Items: Monthly Spending

**Approaching 3-in-5 owners report spending up to \$50 per month on non-food products for their pets (56%)**

Gen X owners are most likely to spend up to \$50 a month on non-food pet items, with 71 percent of cat owners, and 70 percent of dog owners doing so. More than 3-in-5 owners without children spend this amount (62%). Owners with 2 children under 18 are more likely to spend \$51-\$100 on non-food items for their pets (40%) than other families. Males are 11 points more likely to spend this amount (39%) than females (28%). Owners with HHIs of \$200,000 or more a year are the most likely to spend more than \$200 on non-food items for their pets (24%). Owners of 4 or more dogs are also more likely to spend more than \$200 per month on non-food items for their pets (12%) - four times more likely than owners of 4 or more cats (3%).

### QUESTION 40

On average, how much do you spend on non-food products for your pet(s) per month? If you're not sure, please select your best guess. n=1,001

## Almost Three-Quarters of All Owners Purchase Treats for Their Pets (73%)

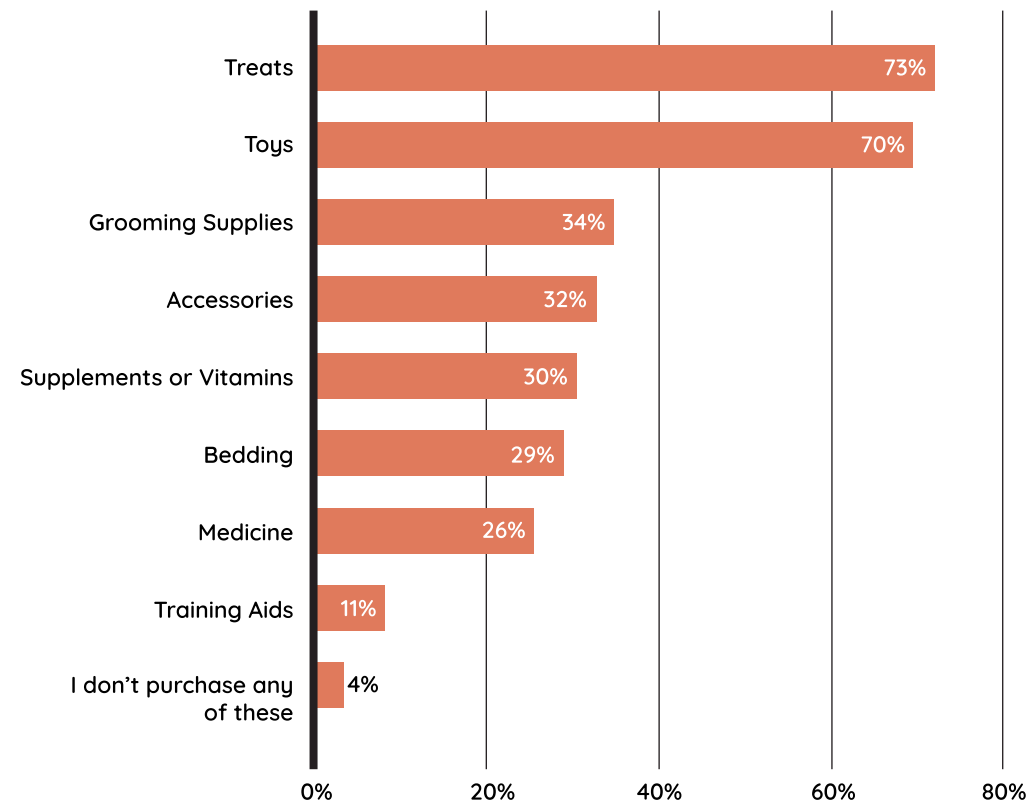
While treats are the top category, 7-in-10 owners say they regularly purchase toys for their pets (70%). This behavior is more prevalent among owners identifying as female (73%) - 10 points higher than males (63%). Almost one-fifth of owners identifying as male regularly purchase training aids (19%), more than twice the percentage of females (8%). Almost one-third of Gen Z cat owners regularly buy supplements or vitamins (32%) for their pets compared to 23 percent of Gen X. Three-quarters of Gen Y dog owners regularly buy toys for their pets (75%), 10 points more than Gen X dog owners (65%). Owners with 4 kids or more kids in the household are 10 points less likely to buy toys (60%) than average (70%).

### QUESTION 45

Which of these items, if any, do you purchase for your pet(s) regularly?  
Please select all that apply. n=1,001



### Which of these items, if any, do you purchase for your pet(s) regularly?



**QUESTION 45**

Which of these items, if any, do you purchase for your pet(s) regularly? Please select all that apply. n=1,001



## Dog Owner Regular Purchases Versus Cat Owner Regular Purchases

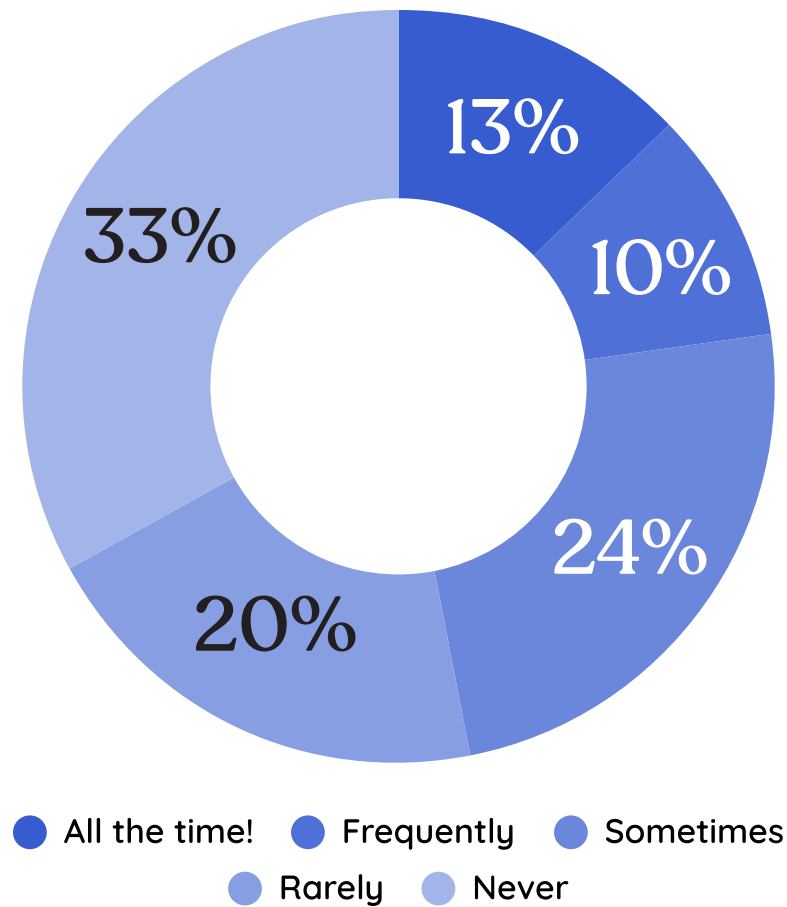
Households with at least one cat but no dogs are less likely to purchase medicine (18%) than those with dogs but no cats (34%), a 16-point difference. And similarly, owners of cats are less likely to purchase accessories (17%) in households where no dogs are present, compared to 31 percent in households with dogs and no cats - a 14-point difference.

### QUESTION 45

Which of these items, if any, do you purchase for your pet(s) regularly? Please select all that apply. Owners with dogs only n=447; cats only n=241

	Dogs Only	Cats Only
Treats	69%	70%
Toys	74%	71%
Grooming Supplies	12%	5%
Supplements or Vitamins	35%	28%
Accessories	31%	17%
Medicine	34%	18%
Bedding	31%	28%
Training Aids	28%	26%
I don't purchase any of these	4%	5%

Do you buy costumes for your pet(s)?



## Pet Costumes

**Approaching one-half of owners purchase costumes sometimes, frequently, or all the time for their pets (47%)**

Almost one-quarter say they sometimes buy costumes for their pets (24%), and around the same percentage combined say they purchase frequently (10%) or all the time (13%). Over one-half of male owners (56%) purchase costumes for their pets, 12 points higher than females (44%). More than one-half of dog owners say they purchase costumes for their pets (51%). Cat owners with other pets are less likely than dog owners to do so (44%), but cat-only households are about as likely (51%). More than one-half of owners with one child under age 18 say they purchase costumes (55%) - 12 points higher than owners without kids in the household (42%). And over one-quarter of owners with 4 or more kids say they buy costumes all the time (28%) - along with almost one-third of owners with annual household incomes of \$150,000 to \$199,999 (31%).

**QUESTION 46**

Do you buy costumes for your pet(s)? n=1,001

# Pet Surveillance

**Two-in-five owners aged 18-57 have purchased a surveillance device to check on their pets (40%)**

Specifically used to surveil their pets while owners are at work, school, or away from home, device purchase is slightly more common among dog owners, at 43 percent. Over one-half of Gen Z dog owners have purchased a surveillance device to check on their pets (52%). In comparison, Gen X dog owners are about half as likely to have done so (27%). Owners in the Midwest are less likely than those in other regions to have purchased (35%), compared to an average of 41 percent in the other regions of the country.

## QUESTION 61

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Have you ever purchased a surveillance device specifically to check on your pet(s) while you are at work, school, or away from your home? *n*=1,001



# Pet-Friendly Accommodations

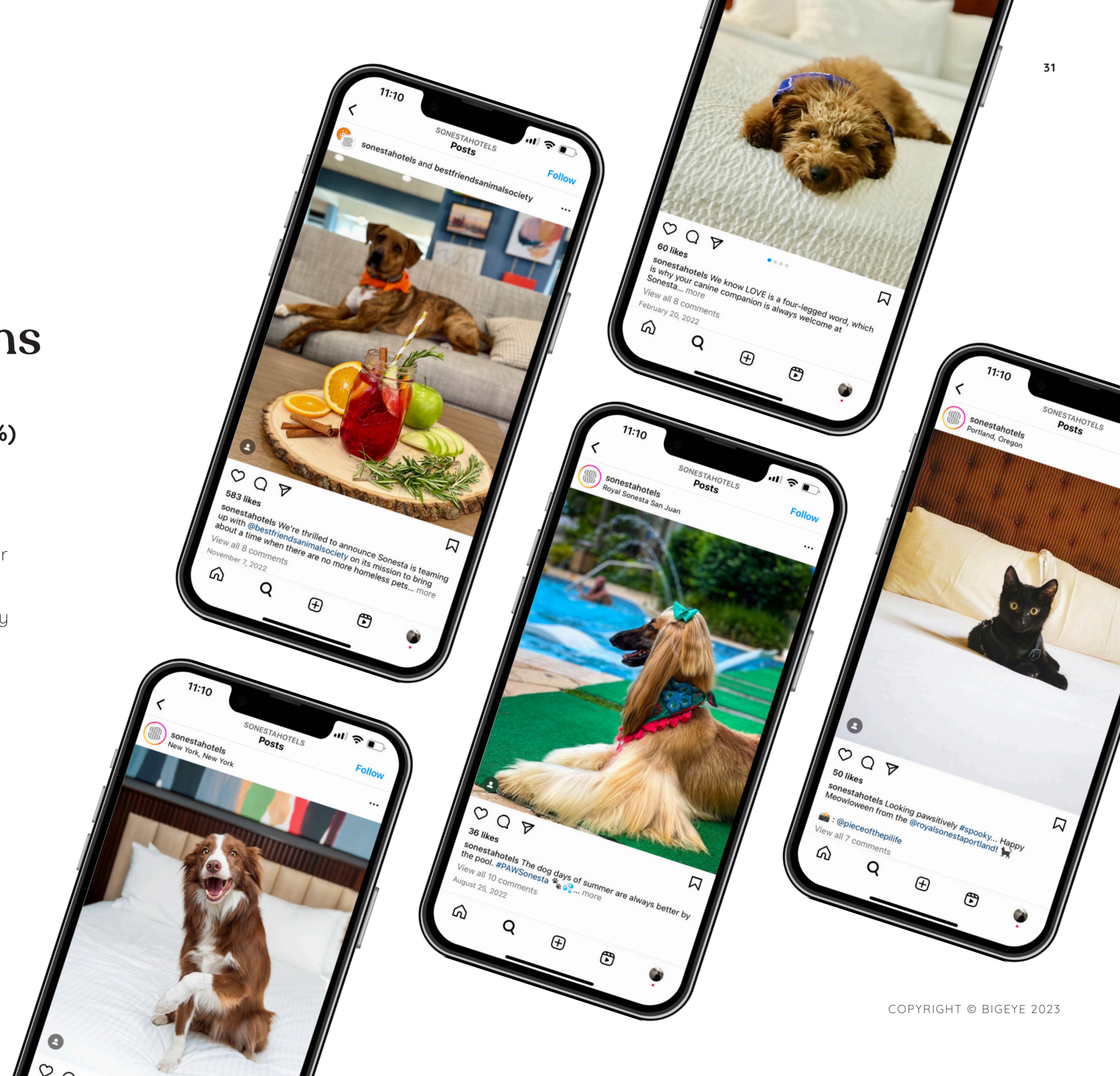
Over two-thirds of owners say when they plan vacations, they typically look for pet-friendly accommodations (68%)

Owners in households with dogs but no cats are the most likely to say they do so (72%) 21 points more than owners of cats, but no dogs (51%).

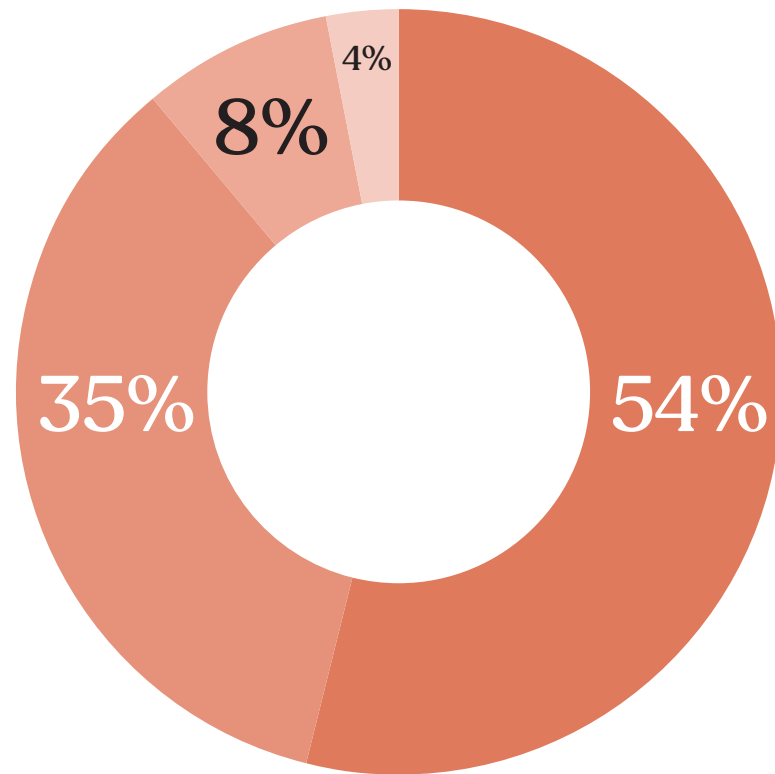
Over three-quarters of owners with an annual household income of \$200,000 or more report that when they plan vacations, they typically look for pet-friendly accommodations (76%). Gen Z (72%) and Gen Y owners (71%) are about equally likely to look for pet-friendly accommodations when they plan vacations, 10 points more than Gen X (61%).

## QUESTION 60

When you plan vacations, do you typically look for pet-friendly accommodations? n=1,001



On average, how much do you spend on medical needs for your pet(s) per year?



● \$0-500 ● \$501-1,000 ● \$1,001-3,000 ● More than \$3,000

## Pets' Medical Needs: Annual Spending

**Over one-half of all owners spend, on average, up to \$500 on their pets' medical needs, per year (54%)**

Female owners are the most likely to spend up to \$500 per year on their pets' medical needs (59%), 15 points more than males (44%). The data reveal a correlation between annual household income and spending. Owners with HHIs of \$50,000-\$79,999 are the most likely to spend up to \$500 per year (47%) - while only 2 percent of this group spends more than \$3,000 on their pets' medical needs. Owners with 4 or more children are four times more likely to spend this (8%) than those with one child (2%) or no children in the household (also 2%). In contrast, among owners reporting household incomes of \$200,000 or more, over one-quarter report spending more than \$3,000 annually (28%), and less than one-fifth spend up to \$500 (16%).

### QUESTION 42

On average, how much do you spend on medical needs for your pet(s) per year? If you're not sure, please select your best guess. n=1,001



## Pet Health Insurance

### Just over one-third of owners report having health insurance for their pets (34%)

But over one-half of Gen Z owners have health insurance for their pets (54%) making them three times more likely to do so than Gen X, among whom only 16 percent do. Owners who live in urban environments are 3 times more likely to have insurance (46%) than those in rural areas (18%). And more than 4-in-10 owners in the Northeast have pet insurance (42%), making them 10 points more likely to do so than owners in other regions (32%, on average). At 44 percent, owners identifying as male are 15 points more likely to say they have health insurance for their pets than females (29%). Slightly more likely than average to have pet insurance are the owners of one dog (40%) and the owners of 2 cats (36%). Nearly one-half of owners with one child under age 18 have pet insurance (47%) - 20 points more than owners without kids (27%). Owners with annual HHIs of \$200,000 or more are also more likely to have insurance (64%).

#### QUESTION 43

Do you currently have health insurance for your pet(s)? n=1,001

## Annual Cost of Pet Health Insurance

### Over one-half of owners report their pets' health insurance costs between \$250 and \$499, per year (53%)

Four-in-ten owners in the South pay less than \$250 per year for their pets' health insurance (40%), while more than 3-in-5 owners in the Northeast face annual pet health insurance costs between \$250 and \$499 (62%). Owners in the West are the most likely to spend \$500 or more per year on their pets' health insurance (15%). Three-in-five male owners pay \$250-\$499 for their pets' health insurance (60%), 11 points higher than females (49%). Economic disparities are reflected in category spending: 3-in-5 owners who have annual household incomes of less than \$25,000 spend less than \$250 on pet insurance (60%). In contrast, among owners reporting HHIs of \$200,000 or more, zero spend less than \$250 - 69 percent spend \$250-\$499, and 31 percent spend \$500 or more. This is also the income group most likely to have health insurance for their pets.

#### QUESTION 44

How much does health insurance for your pet(s) cost per year? n=345

# Pet Services Utilized

## Approaching one-half of pet owners report using grooming services (47%)

Grooming is most popular among dog owners (53%) especially those that live in suburban areas (58%). Over one-half of owners in the West report using grooming services (54%), making them 10 points more likely than owners in the South to do so (44%). Dog-walking services are most used by owners in the South (29%), 5 points higher than the average for other regions (24%). Dog owners living in urban areas are the most likely to use dog walking (36%), doggy daycare (22%), and dog training services (18%). Doggy daycare is most popular with owners in the Midwest, where almost one-fifth report using this service (19%), and in the Northeast, where 18 percent report doing so. On average, dog owners living in rural areas are much less likely to use pet services than urban and suburban dog owners. Drop-in visits are most likely to be used by cat owners without dogs living in suburban areas (25%), 15 points higher than dog owners without cats (10%). Two-in-five owners of cats without dogs in suburban areas use grooming services (39%), also 15 points higher than those in rural areas (24%).

### QUESTION 85

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Which of these services, if any, do you use regularly for your pet(s)? n=1,001





# Shopping Preferences

## Owners are about equally as likely to purchase items based on stores' formats, proximity, or low prices

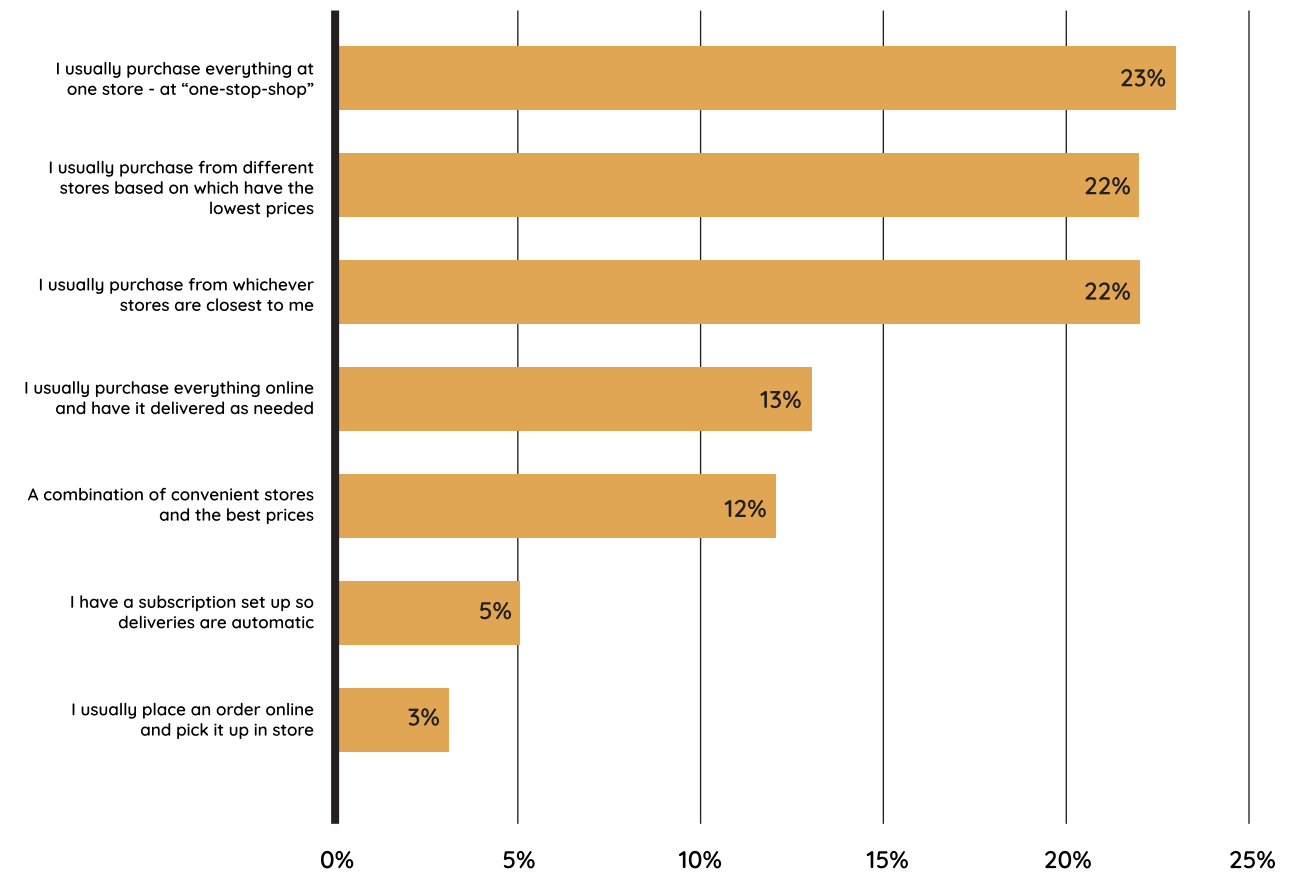
Owners are about equally likely to report purchasing products for their pets at a single store or “one-stop-shop” (23%), from whichever stores are closest to them (22%), and from different stores based on which have the lowest prices (22%). Gen Z owners are the most likely to report purchasing products for their pets from whichever stores are closest to them (26%). Gen Y owners are the most likely to report purchasing products for their pets from different stores, based on which have the lowest prices (25%). Gen X owners are the most likely generation to purchase online and have products for their pets delivered (15%). One-fifth of owners in the Northeast purchase online and have products for their pets delivered (20%), making them the most likely regional residents to do so.

### QUESTION 41

Which of these statements best describes how you shop for pet food and pet products?  
Select one. n=1,001



Which of these statements best describes how you shop for pet food and pet products?



# The Impact Of Inflation On Non-Pet Purchases ...

**Approaching 2-in-5 pet owners have purchased more items on promotion or sale in the past few months for the humans in their households (37%)**

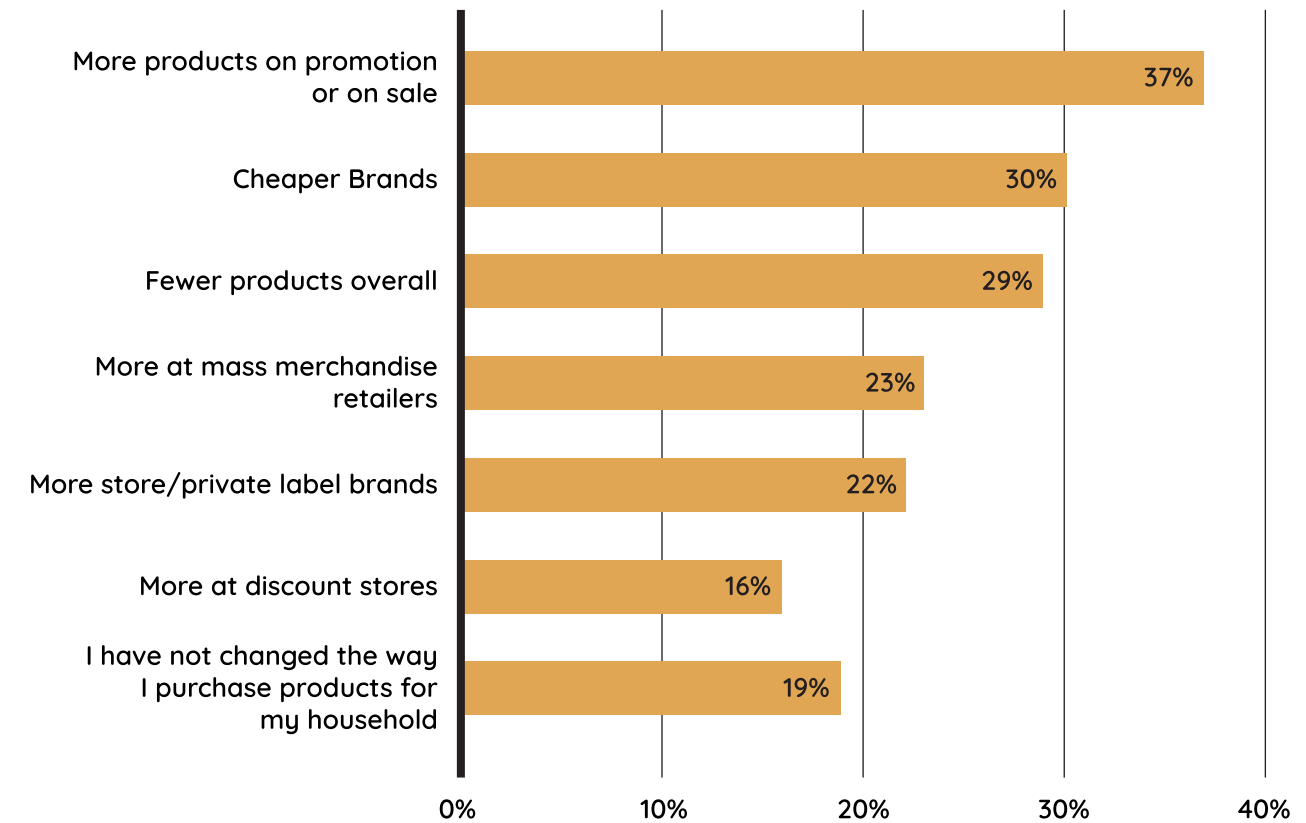
Owners with annual household incomes of \$200,000 or more are among the most likely to report doing so (44%) - 7 points higher than average. But the most likely are those owners with 4 or more children (52%). Gen Y owners are a bit more likely (40%) than Gen Z (37%) or Gen X (33%). Those with annual HHIs of \$200,000 or more are among the most likely to report purchasing more store or private label brands (40%) - compared to an average of 22 percent. Almost one-fifth of owners say that in spite of the highest inflation in 40 years, they have not changed the way they purchase products for their households (19%), with those in the West being 3 points more likely to select this (22%), and Gen X owners (25%) - 9 points higher than Gen Z or Y (both 16%).

**QUESTION 69**

Price inflation is the highest it has been for 40 years. In the past few months, have rising prices impacted the food and household products you buy - not including pet food and products? Please select all that apply. n=1,001

In the past few months, have rising prices impacted the food and household products you buy - not including pet food and products?

## I have purchased...



## ... And On Pet Food and Products

**Owners are less likely to have changed the ways they purchase items for their pets than for the human members of their households**

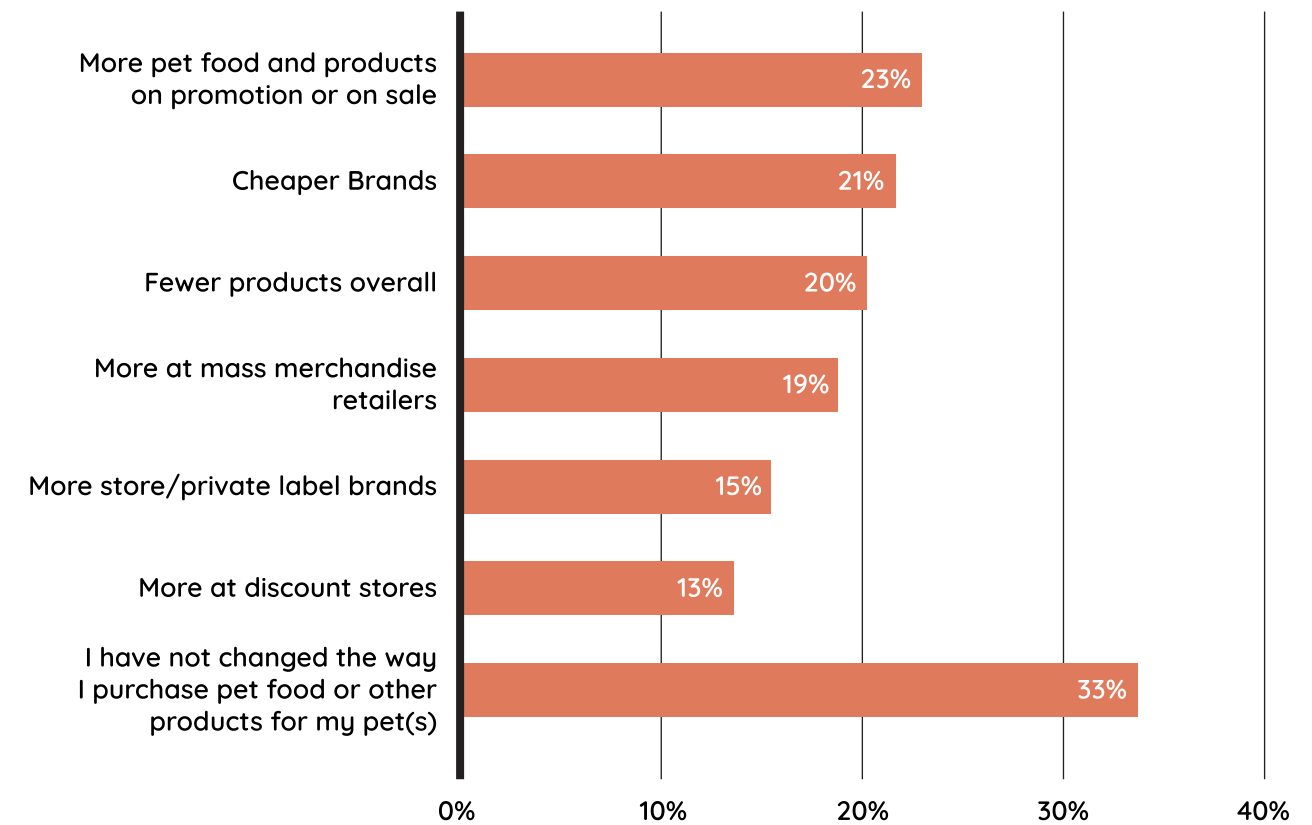
While approaching one-third of owners report purchasing cheaper brands for the human members of their households (30%), only a little over one-fifth have done so for their pets' products (21%). Consistently the most likely cohort to have cut back are Gen Z owners, over one-fifth of whom have purchased fewer products (23%), and purchased more from Big box retailers (22%). In contrast, approaching one-half of Gen X owners have not changed the way they purchase items for their pets (46%), 15 points higher than Gen Y (31%) and twice as likely than Gen Z (23%).

**QUESTION 70**

Has inflation impacted the food and other products you buy for your pet(s) in the past few months? Please select all that apply. n=1,001

**Has inflation impacted the food and other products you buy for your pet(s) in the past few months?**

**I have purchased...**



# Favorite Pet Products

Owners' top reasons for items being favorites are because #1 their pet enjoys it (35%); #2 the quality of the item (20%); and #3 its associated health benefits (13%)

When asked to tell us about their favorite item for their pets, respondents gave a wide range of answers - including food brands, toys, treats, and even furniture. Among dog owners, their pet's enjoyment was the primary reason given for describing it as a favorite product (37%), its quality (22%), and associated health benefits (16%). Here are some of the top picks among dog owners:

- Tennis balls
- Therapeutic Bed
- Moose toy
- Kong toy
- Greenies
- Bully sticks
- Bark box

## QUESTION 47

Think about your favorite brand or item for your pet(s). What is it about the item(s) or brand you like the most? n=794

# Favorite Pet Products

Owners' top reasons for items being favorites are because **#1** their pet enjoys it (35%); **#2** the quality of the item (20%); and **#3** its associated health benefits (13%)

Among cat owners, their pet's enjoyment was again the primary reason given for describing it as a favorite product (44%), followed by perceived health benefits (19%). Cost, fun, and quality tied for third place, each with 8 percent. Here are some of the top picks among cat owners:

- Cat tree
- World's Best Lavendar-Scented Cat Litter
- Temptations cat treats
- Fish toy
- Toy mice
- String toys
- Laser pointer

## QUESTION 47

Think about your favorite brand or item for your pet(s). What is it about the item(s) or brand you like the most? n=794



# 03

## Owners' Perceptions Of Their Pets

In this section of Bigeye's study, we examine owners' perceptions of their pets and the familial roles owners play in their pets' lives. We learn how well owners feel they understand what their pets are trying to communicate to them and whether they believe their pets understand what is said to them. Owners tell us how likely they would be to risk their own lives in order to save their pets in a dangerous situation.







## Pets Are Family Members

**97% of US pet owners overwhelmingly agree - they consider their pets to be family members**

Owners of dogs and cats are equally likely to consider their pets to be family members (97%). There are no significant differences between respondents based on their generations, environments, or the number of pets in their households.

### QUESTION 56

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Do you consider your pet(s) to be a family member? *n*=1,001

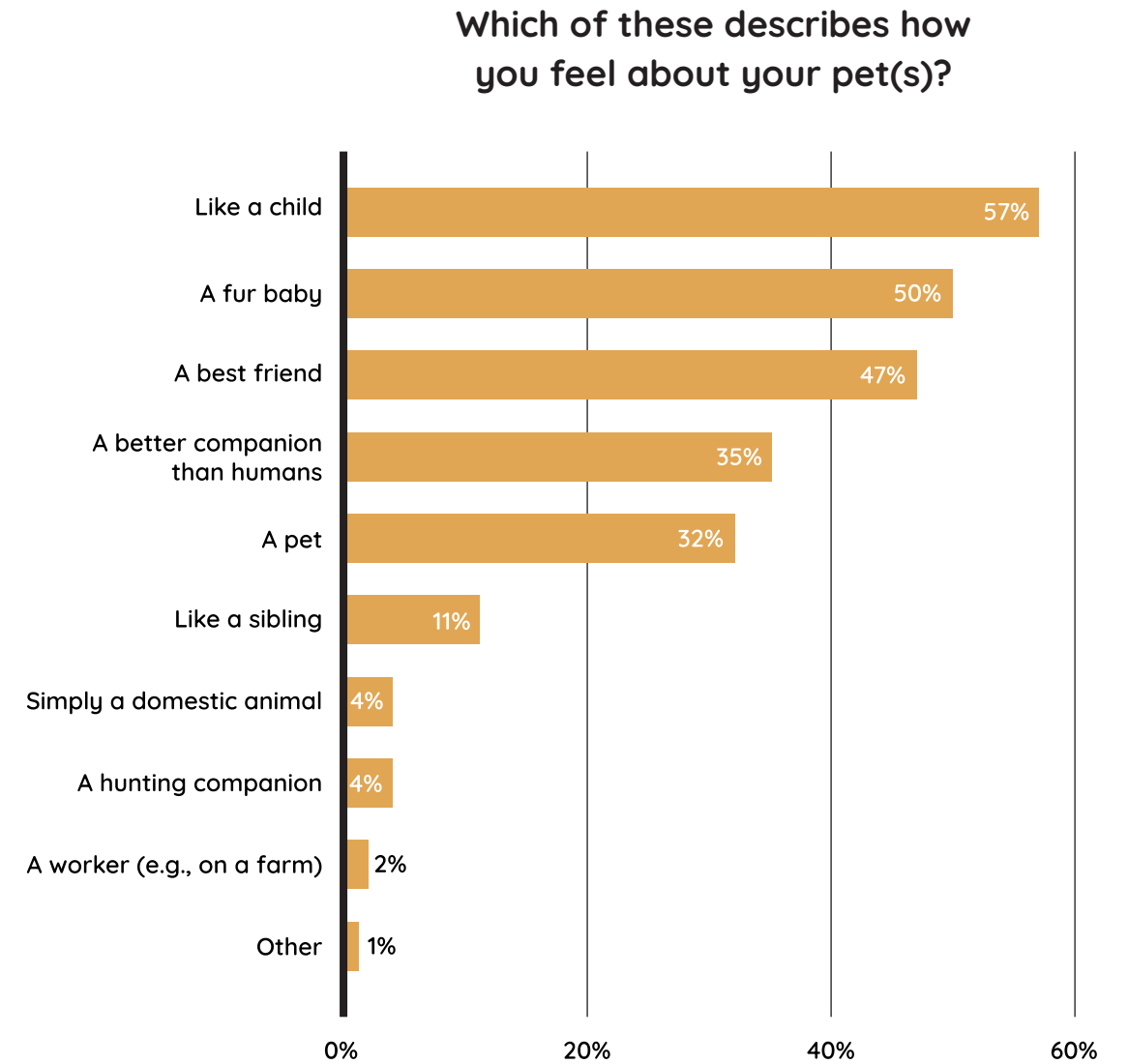
# How Owners Feel About Their Pets

**Approaching 3-in-5 owners describe their pets as being “like a child” to them (57%)**

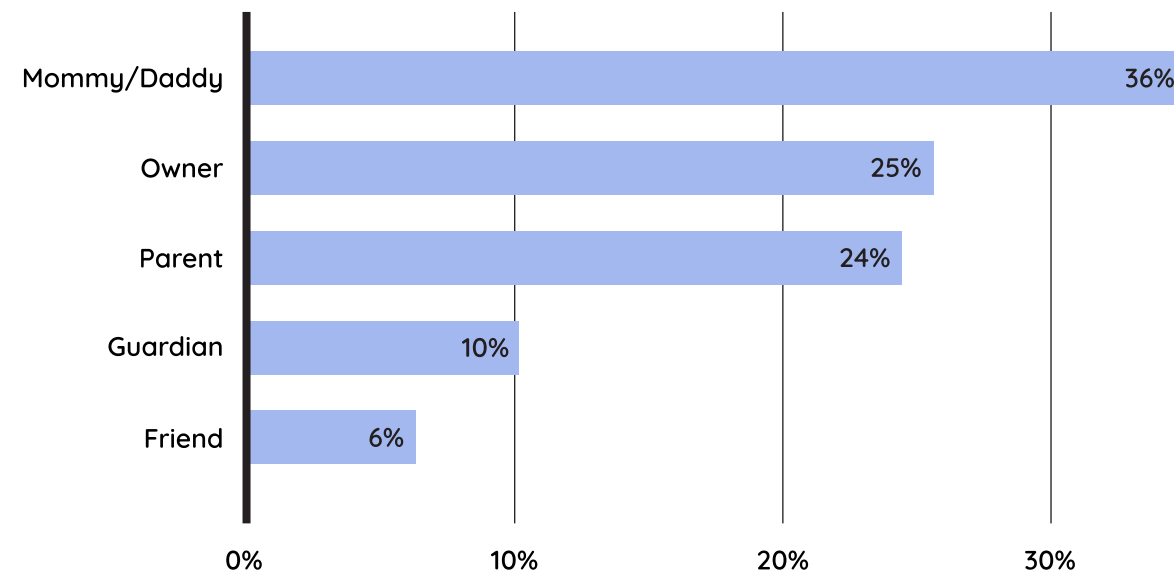
Owners with no kids are most likely to refer to their pet as being “like a child” (61%), 21 points higher than those with 4 or more children (40%). Cat owners are very slightly more likely to consider their pets as “fur babies” (52%) than dog owners (49%). And it’s not just dogs who are considered “man’s best friend” these days: dogs and cats are about equally likely to be considered “a best friend” by owners of dogs (48%) and cats (47%). Gen X owners are the most likely to describe their pets as being “like a child” to them (63%), 10 points higher than Gen Z owners (53%). Gen X owners are also the most likely to describe their pets as being “a better companion than humans” (42%), 12 points higher than Gen Z (31%). Gen Z owners are the most likely to consider their pets “like a sibling” (15%), twice as likely as Gen X owners (7%). The more human children an owner has, the less likely they are to refer to their pets as being “like a child” to them.

**QUESTION 54**

Which of these describes how you feel about your pet(s)? Select all that apply. n=1,001



How would you describe your role in your pet's life? Are you his/her/their ...?



QUESTION 55

How would you describe your role in your pet's life? Are you his/her/their ...? n=1,001

## Owners' Roles In Their Pets' Lives

**Over one-third of owners describe their role as “Mommy / Daddy” to their pets (36%)**

More than 2-in-5 Gen X owners describe their role as “Mommy / Daddy” to their pets (44%), making them the most likely generation to do so. Owners who have no children aged under 18 in their households are also more likely (40%) - 10 points higher than owners with children aged under 18 (avg. 30%). One-quarter self-identify their role as “owners” in their pets’ lives (25%). Approaching 1-in-10 Gen Z owners describe their role as their pets’ “friend” (9%) compared to 4 percent of Gen X owners. While just under one-quarter of all owners describe themselves as “parent” to their pets (24%), this is more pronounced among Gen Y owners (27%). Owners in the Midwest are also more likely to use this term (29%) - 8 points higher than those in the West (21%).

Especially for child-free families and for involuntarily childless families, dogs and cats have taken on a very significant role. Where these families are very aware that their dogs and cats are not actual children, but they have bonded with them as if they're children. And their behavior suggests that they think of them as children where they are engaged in reading stories to their pets, where they travel everywhere with their pets, where they are willing to lay out thousands of dollars for things like veterinary care to ensure that their pets have the absolute best lives possible.

**Dr. Andrea Laurent-Simpson**

IN CLEAR FOCUS Podcast



**QUESTION 55**

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How would you describe your role in your pet's life? Are you his/her/their ...? n=1,001





## What Owners Do For Their Pets

**More than 4-in-5 owners strongly or somewhat agree that they love and spoil their pets as if they were children (82%)**

Perhaps unsurprisingly, given their perception of pets as family members, 4-in-5 owners agree they take as much care in choosing food for their pets as they do with other members of their family (79%).

Three-quarters of owners strongly or somewhat agree that they strive to feed their pets ingredients that they would be comfortable eating themselves (75%). Three-in-five Gen Z owners agree that they would prepare meals from scratch to ensure the quality of what their pets consume (62%). And almost three-quarters of Gen Z owners agree they would shift their personal budgets to buy pet food that meets their own quality standards (74%).

### QUESTION 57

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To what extent do you agree or disagree with the following statements? n=1,001

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

	Strongly Agree	Somewhat Agree	Neither Agree nor Disagree	Somewhat Disagree	Strongly Disagree
I love and spoil my pet(s) as if they were a child	55%	27%	13%	3%	2%
I take as much care in choosing food for my pets as I do with other members of my family	50%	29%	15%	5%	1%
I strive to feed my pet(s) ingredients that I would be comfortable eating myself	46%	29%	19%	5%	1%
I would shift my personal budget to buy my pet food that meets my quality standards	38%	32%	20%	7%	2%
I would prepare my pet's meals from scratch to ensure the quality of what they are consuming	34%	24%	23%	12%	7%

**QUESTION 57**

To what extent do you agree or disagree with the following statements? n=1,001



**Three-in-five Gen Z owners say they would prepare meals from scratch to ensure the quality of what their pets consume. What does this tell us?**

First of all, it represents this continued trend where we are just seeing more and more focus on how we take care of our bodies and the kinds of ingredients that we put into our bodies. But I think also it reflects a continued trend for Gen Z where I think that probably as they get older, as they start building their own family - choosing to be child-free within their family structures - that they're going to turn to their pets in particular. Gen Z certainly has the potential to have greater child-free choices as they grow older, to turn to their pets, and really treat them behaviorally as if they're human.

**Dr. Andrea Laurent-Simpson**

IN CLEAR FOCUS Podcast

## Owners' Understanding Of Their Pets ...

**Approaching 9-in-10 owners say they understand what their pets are trying to communicate to them (87%)**

Dog owners in multi-pet households are very slightly more likely to do so (88%) with almost 2-in-5 saying they understand their pets extremely well (37%). Nine-in-ten Gen X owners feel they understand what their pets may be trying to communicate to them (90%), slightly higher than Gen Y and Gen Z (both 86%). Pet owners with advanced degrees are among the most likely to say they understand their pets' communication extremely well (47%) - 19 points higher than those with Bachelor's degrees (28%).

### QUESTION 84

Typically, how well do you feel you understand what your pet(s) may be trying to communicate to you? *n*=1,001

## ... And Pets' Understanding Of Their Owners

**And two-thirds of owners believe their pets understand most or everything said to them (66%)**

One-quarter of owners believe their pets understand some of what is said to them (25%). Across all owners, only 1 percent say their pets understand nothing at all. In households with dogs and no cats, 70 percent of owners believe their pets understand most or everything said to them. This belief is predominant in the West, where approaching three-quarters of owners say that their pets understand most or everything said to them (73%), 16 points more than those in the Midwest (57%). Owners who are separated from their partners are significantly more likely to say their pets understand everything (39%), and over one-half of those who are widowed believe their pets understand most of what is said to them (55%).

### QUESTION 64

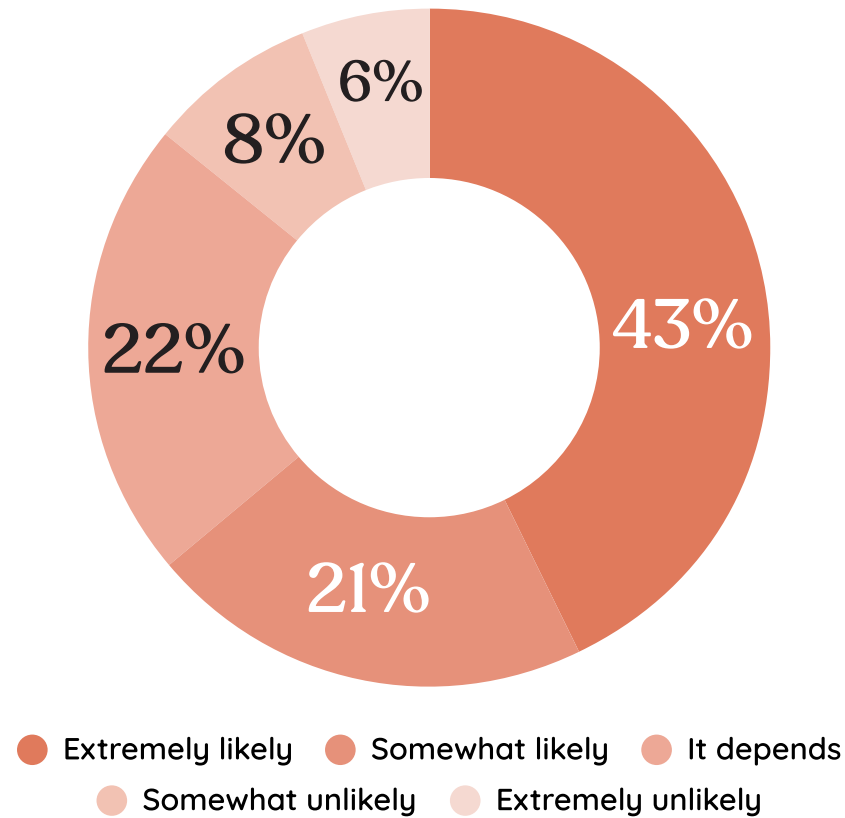
When addressing your pet(s), how much do you think they understand what you say? *n*=1,001

# Dangerous Situations

**Almost two-thirds of owners report they would be extremely or somewhat likely to risk their own lives to save their pets from a dangerous situation (64%)**

In households with cats, but no dogs, owners are slightly less likely to say they would risk their lives (59%), but among dog owners, 45 percent say they would be extremely likely to do so. Gen X owners are the most likely to say they would be likely to risk their own lives (71%), compared to 62 percent of Gen Z, and 59 percent of Gen Y owners. One-half of Gen X owners say they would be extremely likely (50%). Owners in households without any children aged under 18 are also more likely than others to say they would risk their own lives to save their pets from a dangerous situation (70%) - with 48 percent of them extremely likely. Owners in households with 4 or more children aged under 18 are most likely to say "it depends" whether they would risk their own lives to save their pets from a dangerous situation (32%) and only 12 percent would be extremely likely to do so.

How likely would you risk your own life to save your pet(s) from a dangerous situation?



**QUESTION 62**

How likely would you risk your own life to save your pet(s) from a dangerous situation? n=1,001

**Bigeye's data suggests that we need more pet-friendly locations for people to shelter during natural disasters. Have you seen anything in your research that reflects this willingness to save pets during dangerous life-or-death situations?**

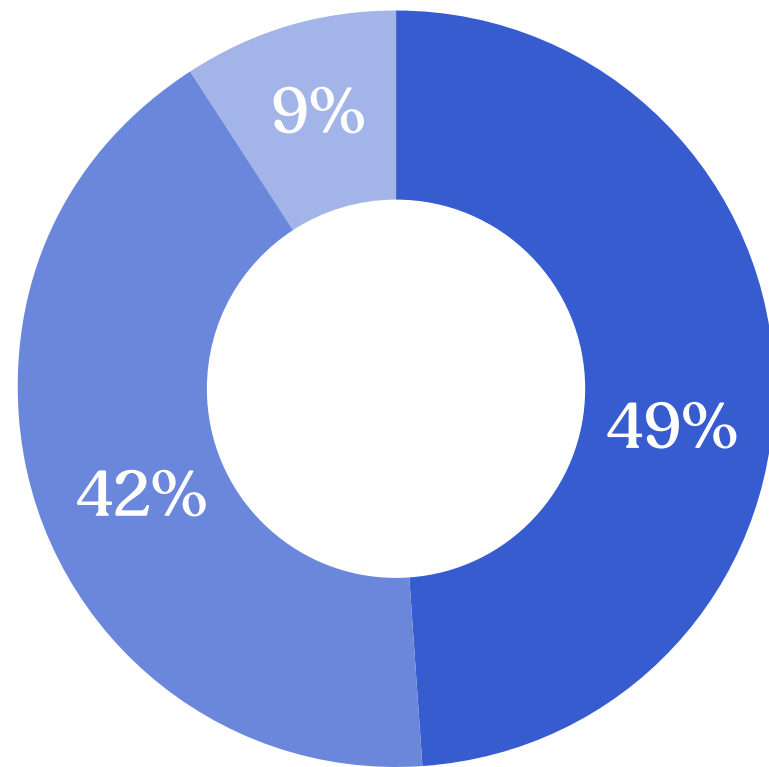
Definitively in my research, while we didn't speak as much about disasters, I certainly saw evidence that people were either willing to sacrifice their own safety for the safety of their pets, whether that was physical safety or emotional safety. It broke down by family structure, with people who had human children reporting, "If you put me in a situation where I have to choose between my dog or cat and my human children, I'm going to choose my human children every single time." But speaking with child-free families or involuntarily childless families, it was a very different story. There was definitely an increased willingness to put themselves out there, for what they might have perceived as emotional bullying of their pets, either by partners or by friends, but even physical safety.

**Dr. Andrea Laurent-Simpson**  
IN CLEAR FOCUS Podcast





If trapped on a desert island, which of these would you prefer?



- To live out my days with a dog or a cat
- To live out my days with a human companion
- To live out my days alone

## If Trapped On A Desert Island

**When asked to imagine a hypothetical situation of being trapped on a desert island, almost one-half of owners say they would prefer to live out their days with a dog or a cat (49%)**

Forty-two percent of pet owners say they would prefer to live out their days with a human companion, and 9 percent say they would prefer to be alone. Owners identifying as female, and cat owners are more likely to say they would prefer to live out their days with a pet, both at 52 percent. More likely than others to say they would prefer to live out their days with a dog or a cat are pet owners who are divorced (66%) or separated (61%). This is almost the most popular response among owners without children in their households (57%), and for 3-in-5 Gen X pet owners (59%). Gen Z owners are more likely to select human companionship if stranded on a desert island (46%). The most likely to say they would live out their days alone are parents with one child (14%) - and owners identifying as male (17%) - almost three times more likely than females (6%).

**QUESTION 63**

If trapped on a desert island, which of these would you prefer? n=1,001



# Q4

## The Social Pet

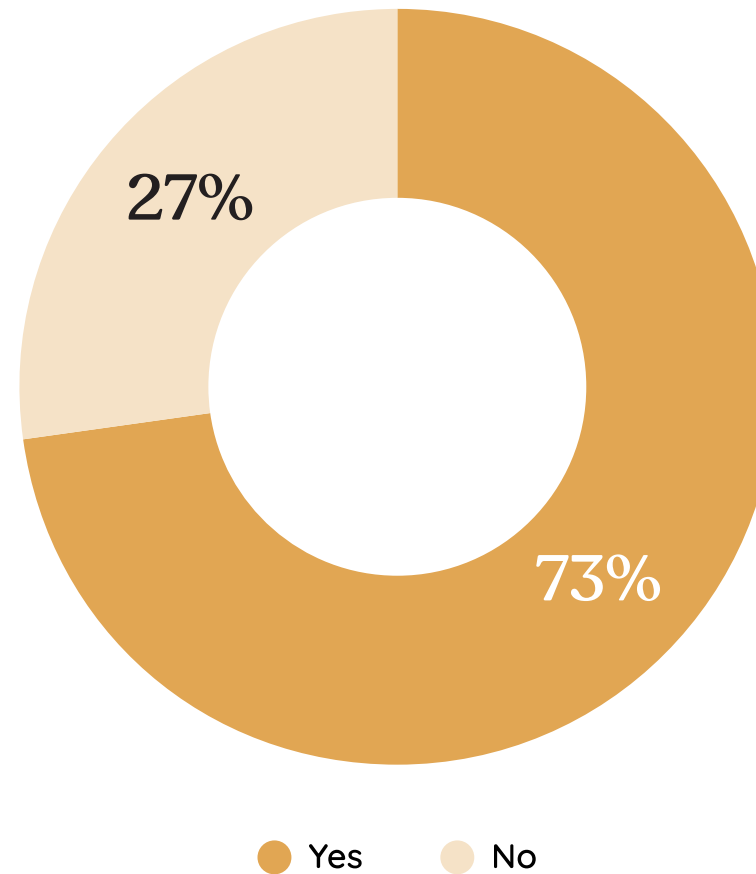
In this section of Bigeye's study, we examine some of the ways that pets have become members of what Dr. Andrea Laurent-Simpson defines as the multi-species family. The results show how many pet owners celebrate their pet's birthday or adoption anniversary, purchase gifts for them, and host parties for the occasion. We learn how many owners have had photos of their pets taken by professional pet photographers, which types of owners are most likely to follow pet influencers on social media, and quantify how many owners manage social media accounts for their pets.

# Birthday and Adoption Anniversaries

**Almost three-quarters of owners celebrate their pets' birthdays or adoption anniversaries (73%)**

This is more prevalent among dog owners, with approaching 4-in-5 dog owners doing so (77%). And in households with dogs but no cats, over 4-in-5 of those with just one child celebrate (85%), as do 80 percent of households with 3 kids, and even 79 percent of those with no kids. Among all cat owners, well over two-thirds celebrate their pets' birthday or adoption anniversary (69%). In households with cats but no dogs, the percentages are lower. Sixty-two percent of these owners with no children celebrate, making them a little more likely to do so than those with one child (56%), two children (55%) or 3 (60%). At almost 9-in-10, owners reporting annual HHIs of \$200,000 or more are also more likely to celebrate (88%), 20 points higher than those reporting annual HHIs of \$0-\$24,999 (68%).

Do you celebrate your pet's birthday or adoption anniversary?

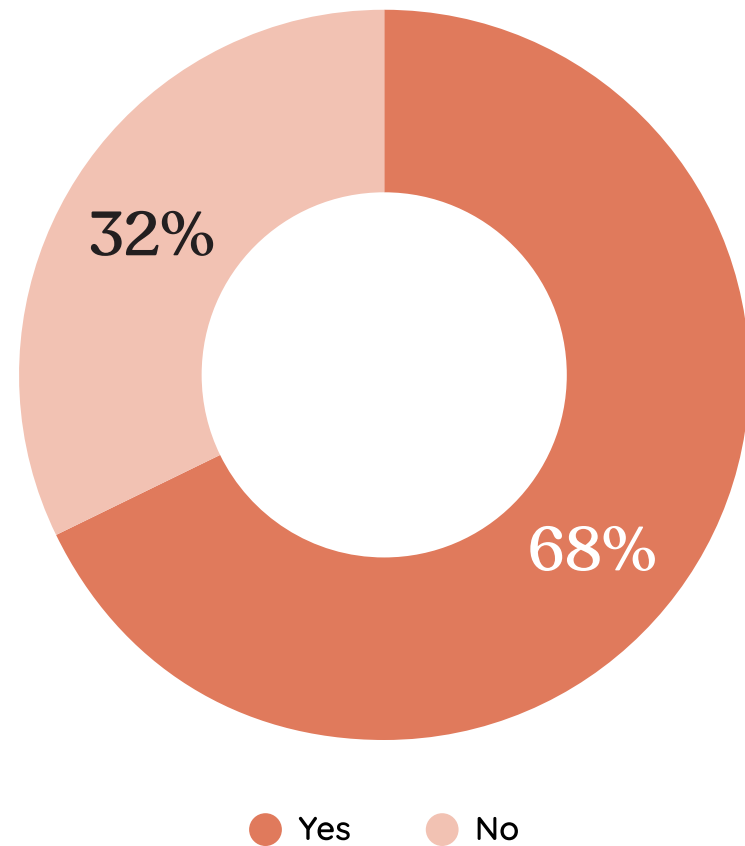


QUESTION 48

Do you celebrate your pet's birthday or adoption anniversary? n=1,001



Do you purchase birthday or adoption anniversary gifts for your pet(s)?



## Birthday and Adoption Anniversary Gifts

**Over two-thirds of owners purchase birthday or adoption anniversary gifts for their pets (68%)**

Owners of multiple pets are slightly more likely to purchase gifts (70%) than owners of one pet (66%). There are some interesting generational and regional differences: for example, almost 4-in-5 Gen Z owners buy birthday or adoption anniversary gifts for their pets (78%), 22 points higher than Gen X (56%). And more than 7-in-10 owners in the Northeast and Midwest purchase birthday and anniversary gifts for their pets (72%), compared to two-thirds of owners in the South and West (66%). Approaching three-quarters of all dog owners purchase gifts for their pets' birthdays or adoption anniversaries (72%). Dog owners without children are a little less likely to do so (66%). In homes with dogs but no cats, owners with three children under age 18 are the most likely to buy gifts (80%). Among all cat owners, two-thirds purchase gifts for their pets' birthdays or adoption anniversaries (66%). In households with cats but no dogs, the percentages are a little lower. These owners with 3 children are a little more likely (60%) than those with no children (55%)

**QUESTION 49**

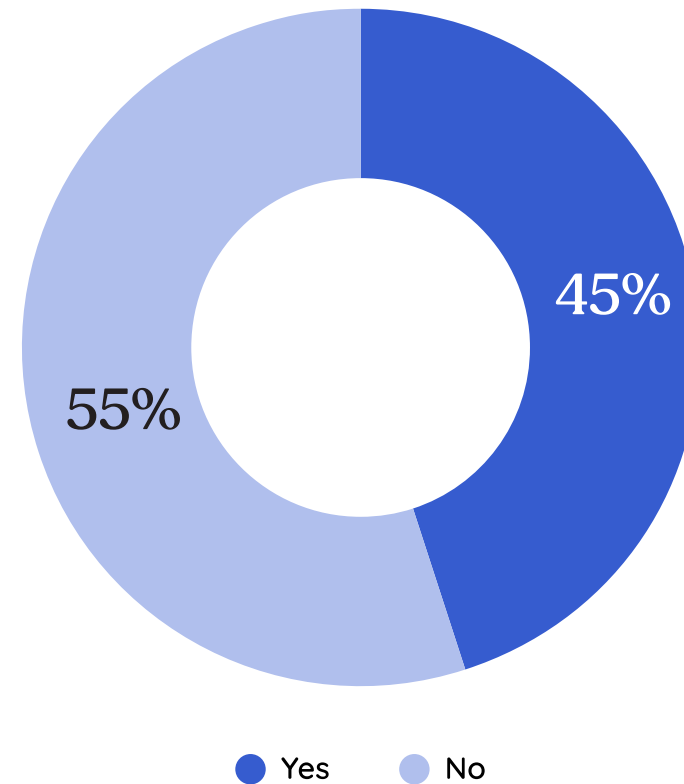
Do you purchase birthday or adoption anniversary gifts for your pet(s)? n=1,001

# Birthday and Adoption Anniversary Parties

## Approaching one-half of all owners have birthday or adoption anniversary parties for their pets (45%)

Approaching 3-in-5 owners identifying as male have birthday or adoption parties for their pets (57%), 17 points higher than females (40%). More likely to have birthday or adoption anniversary parties for their pets are owners of dogs who have other pets in their household (48%); less likely are owners of cats but not dogs (34%). In households with dogs, but no cats, well over one-half of those with just one child aged under 18 have parties (56%), 9 points higher than the average (45%). There are generational differences, with approaching 3-in-5 Gen Z owners having birthday or adoption parties for their pets (57%), 11 points higher than Gen Y (46%), and 24 points higher than Gen X (33%). Dog owners with HHIs of \$200,000 or more are the most likely to have birthday or adoption parties for their pets (76%).

Do you have birthday or adoption anniversary parties for your pet(s)?



QUESTION 50

Do you have birthday or adoption anniversary parties for your pet(s)? n=1,001



**In multi-pet households approaching one-half of dog owners have birthday or adoption parties for their pets, while over two-thirds of all owners purchase birthday or adoption anniversary gifts. Can you unpack this consumer behavior for us?**

This is, to me, a very predictable trend. Thinking of dogs and cats as family members, as valued family members, and needing to spoil them as such. These four-legged children are now increasingly celebrated and being doted upon with adoption or birthday gifts and anniversaries and other holiday celebrations as well. It's simply a demonstration of the emotional value we place on you and your presence and the time spent in our family.

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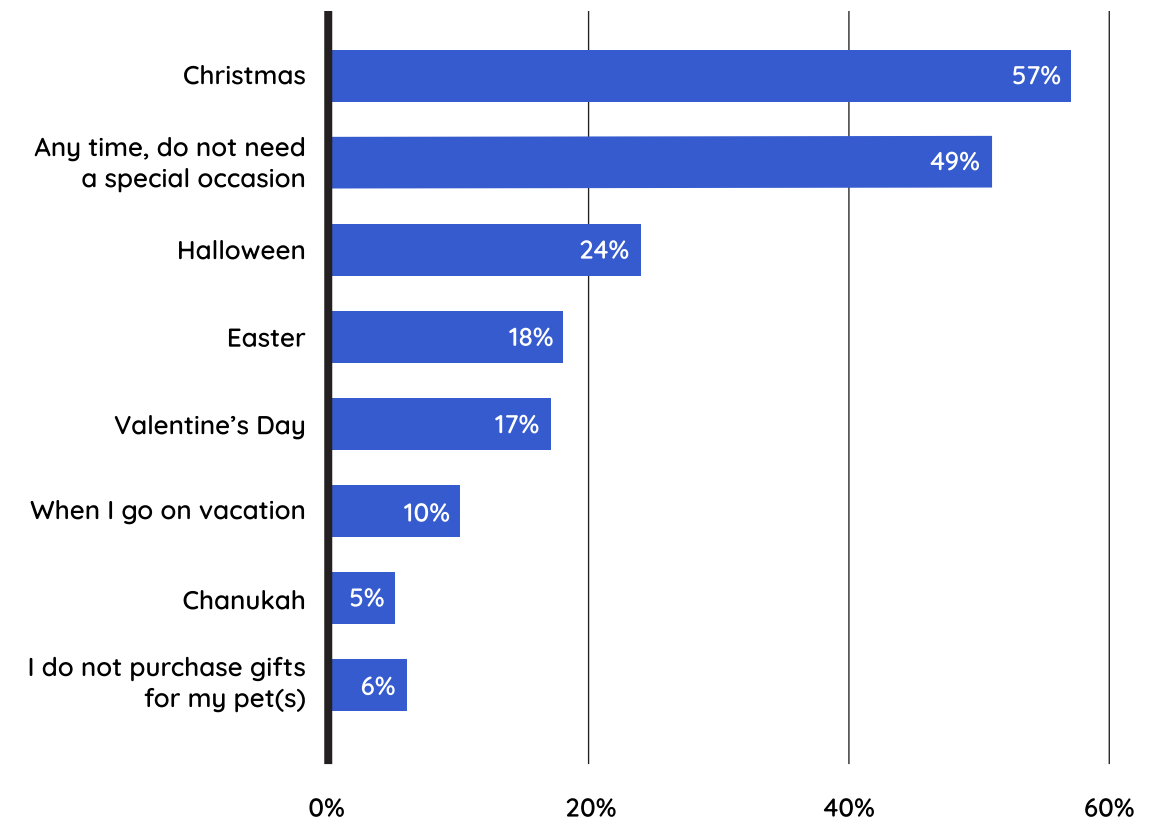


# Gift Occasions

**Christmas is the most popular occasion for owners to purchase gifts for their pets (57%)**

And more than 3-in-5 dog owners say they buy gifts for their pets at Christmas (61%). Regionally, in households with only dogs, owners in the Northeast are the most likely to buy Christmas gifts for their pets (72%), and the region also boasts the most owners buying gifts for Chanukah (5%). But just under one-half of all owners do not need a special occasion - any time is good to buy gifts for their pets (49%). Owners without children in the household are the most likely to purchase presents at any time of the year (55%), ten points more than those who have 1 or 2 kids (45%). More than one-half of dog owners with the highest annual household incomes (\$200k+) report purchasing gifts for their pets for Valentine’s Day and at Halloween (both 52%), making them most likely to do so. Almost one-quarter of dog owners in this HHI bracket also purchase gifts for their pets when they go on vacation (24%).

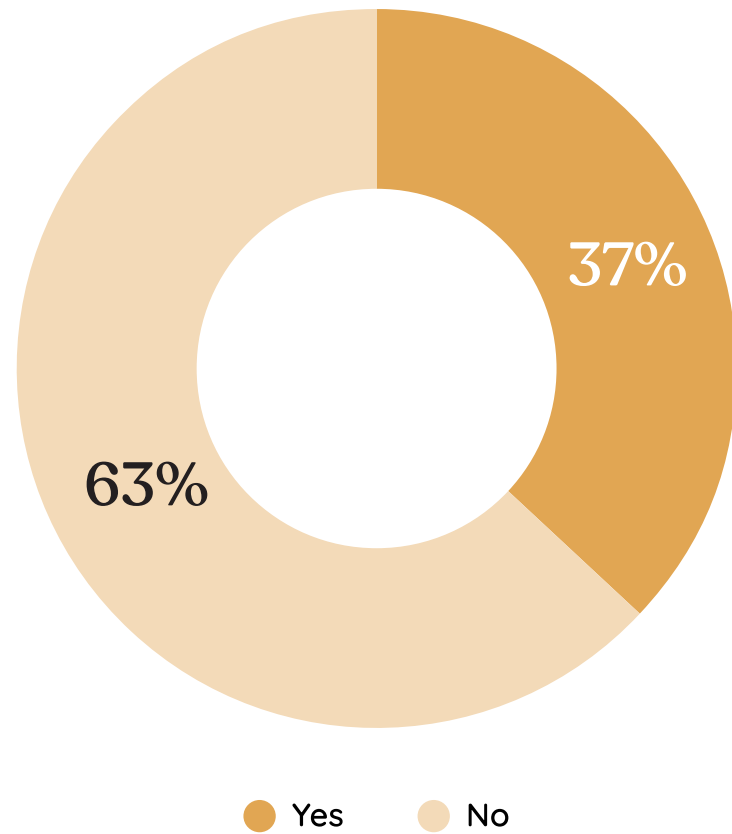
On which of the following occasions, if any, do you purchase gifts for your pet(s)?



QUESTION 51

On which of the following occasions, if any, do you purchase gifts for your pet(s)? Please select all that apply. n=1,001

Do you sign greeting cards on behalf of your pet(s)?



## Greeting Cards

**More than one-third of owners sign greeting cards on behalf of their pets (36%)**

More than 2-in-5 owners identifying as male sign greetings cards on behalf of their pets (41%), 6 points higher than females. Owners resident in the Northeast are more likely to sign cards (43%) than those elsewhere - least likely to do so are owners in the South, where one-third do so (33%). Dog owners are slightly more likely to sign greeting cards on behalf of their pets (38%) than cat owners (34%). Owners with more than one pet are also more likely to sign (40%) than those with just one pet (31%) - a 9-point difference.



QUESTION 52

Do you sign greeting cards on behalf of your pet(s)? n=1,001

**In our study, one-half of all owners say they purchase costumes for their pets. Owners who follow pet influencers are more than twice as likely to report having photos of their pets taken by professional photographers than owners who do not follow pet influencers. What does this tell us about them?**

I think that pet owners who are more likely to be followers of social media accounts, especially those that mention professional pet photography, are going and buying that service and feeling justified in doing it because they've seen the reproduction of the multi-species families through social media advertising. It helps them reinforce their perception of their dogs and cats as family members, as children. And it also rewards them - it gives them a good feeling because, "Here is my family, here's the professional photography of my family." And they are deserving of recognition as such: "My family has four legs, yours has two. Your children have two, mine have four. We're all the same." So Gen Z being the ones that are the most wrapped up in this - it's very unsurprising to me, but interesting.

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## Pet Photos By Professional Photographers

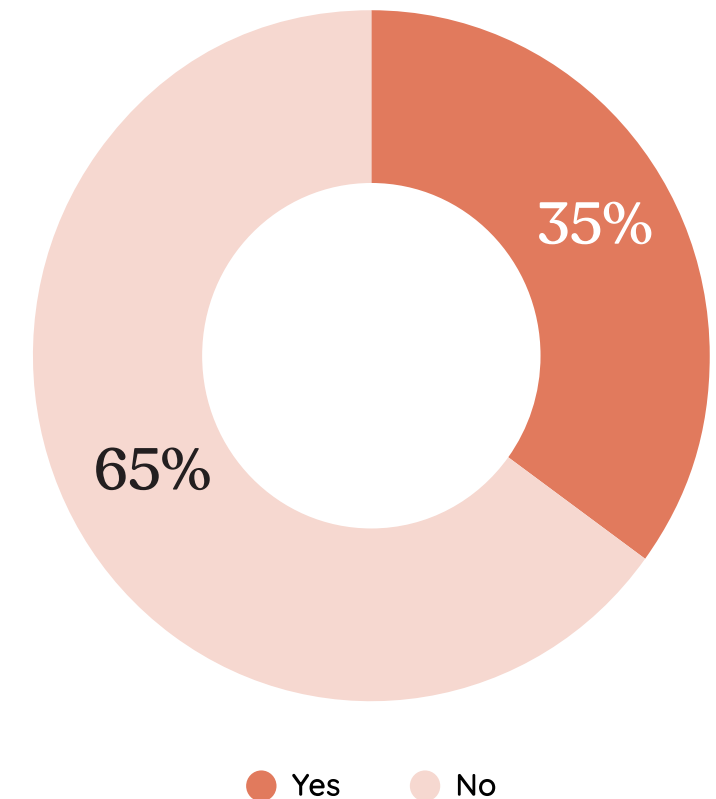
**Over one-third of owners have had photos taken of their pets by professional pet photographers (35%)**

Gen Z owners are the most likely to have had photos taken of their pets by professional pet photographers (44%) compared to Gen Y (38%) and Gen X owners (24%). Owners who follow the social media accounts of dogs or cats (pet influencers) are more than twice as likely to report having photos of their pets taken by professional photographers (50%) than owners who do not follow pet influencers on social media (21%). More than 2-in-5 owners in the Northeast have had photos taken of their pets by professional pet photographers (44%), compared with 31 percent in the Midwest. Owners with children are more likely to have had photos taken professionally of their pets (41%) than those owners without children in their households (29%).

### QUESTION 65

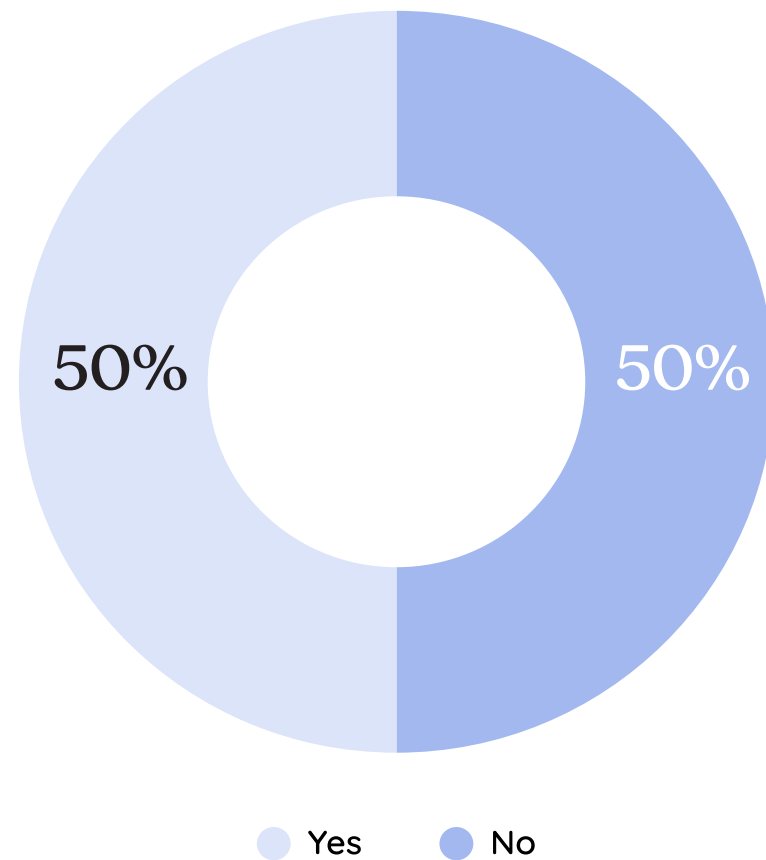
Have you ever had photos taken of your pet(s) by a professional pet photographer? n=1,001

**Have you ever had photos taken of your pet(s) by a professional pet photographer?**





Do you follow the social media accounts of any dogs or cats (e.g., influencers)?



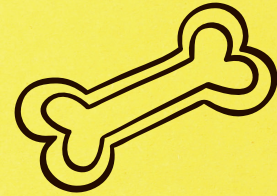
## Owners Following Pet Influencers On Social Media

**One-half of all owners aged 18-57 follow pet influencers on social media (50%)**

Dog owners in multi-pet families are very slightly more likely to say they follow the social media accounts of pet influencers (51%). Approaching 3-in-5 Gen Z owners follow the accounts of dogs or cats on social media (58%) compared with 51 percent of Gen Y, and 2-in-5 Gen X pet owners (41%). Owners of multiple pets are 11 points more likely to follow pet influencers (54%) than owners of a single pet (43%). Owners identifying as Hispanic (53%) are 4 points higher than those who identify as non-Hispanic (49%) to do so. And owners with a bachelor's degree (53%) or an advanced degree (61%) are also more likely to follow pet influencers. Urban owners (58%) are more likely to follow pet influencers than those in suburban (47%) or rural areas (45%).

**QUESTION 66**

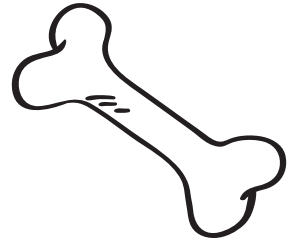
Do you follow the social media accounts of any dogs or cats (e.g., influencers)? n=1,001



# Favorite Pet Influencers

We asked the respondents who follow pet influencers to tell us their three favorites. While we received lots of different suggestions, six dog accounts and six cat accounts emerged as favorites overall.

# Dog Influencers



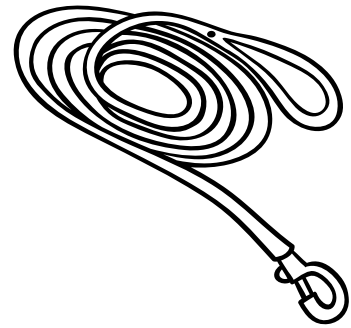
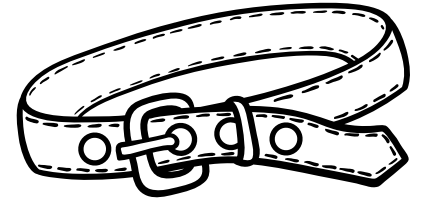
**@whataboutbunny**  
Followers: 1.3M



**@brodiethatdood**  
Followers: 843K



**@hammyandolivia**  
Followers: 745K



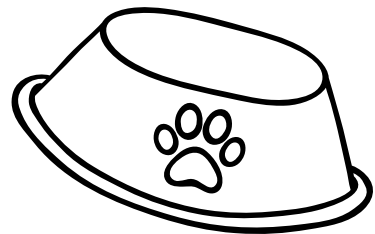
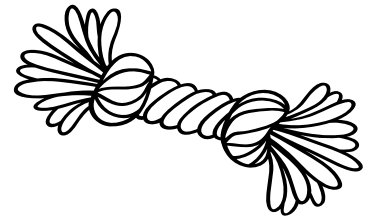
**@rubydooby\_do**  
Followers: 350K



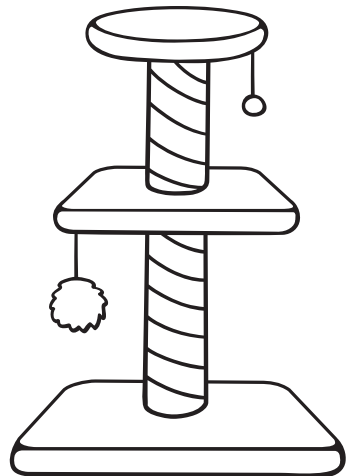
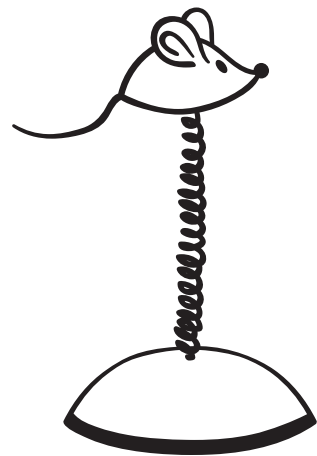
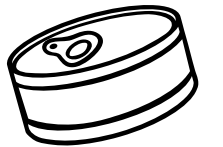
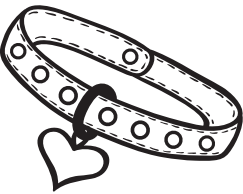
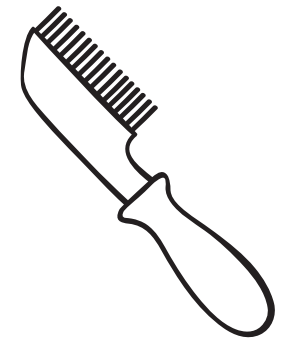
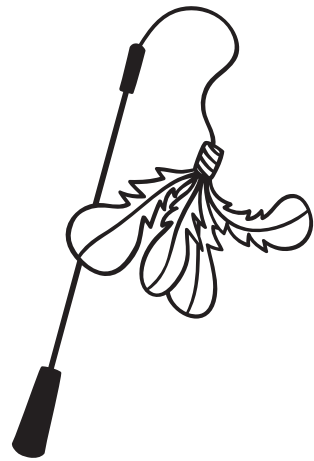
**@tofupupper**  
Followers: 278K



**@olaftheroyalpug**  
Followers: 14.7K



# Cat Influencers



**@missenell**  
Followers: 760K



**@coleandmarmalade**  
Followers: 675K



**@greatgramsofgary**  
Followers: 501K



**@abram.engle**  
Followers: 372K



**@balam\_says**  
Followers: 287K



**@melon.n.finn**  
Followers: 197K

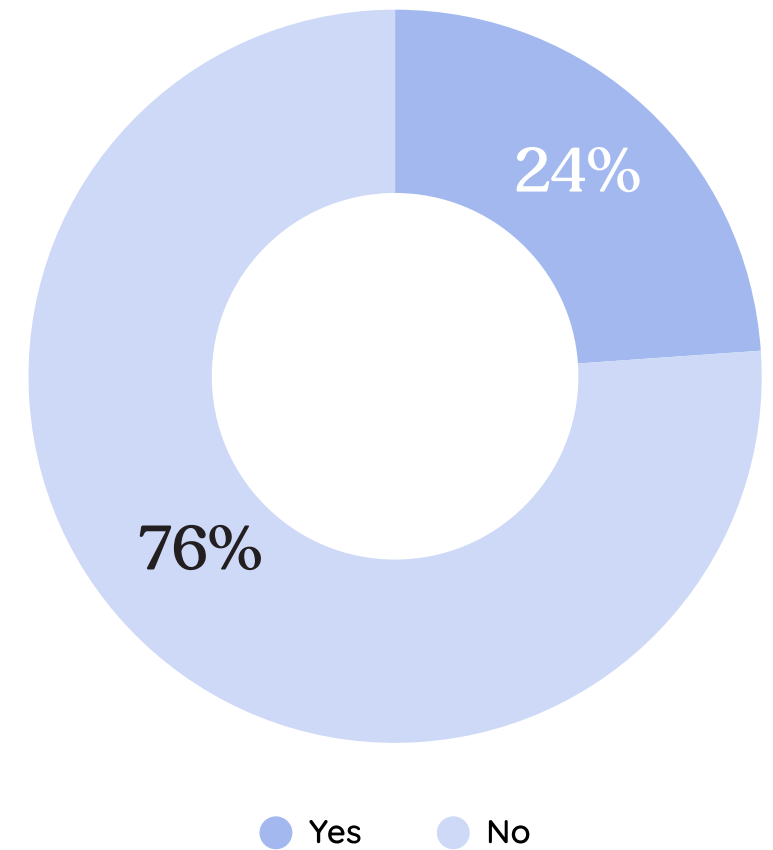


## Owners Managing Social Media Accounts for Their Pets

**Almost one-quarter of owners manage a social media account on behalf of their pets (24%)**

Male owners are 11 points more likely to say they manage a social media account on behalf of their pets (32%) than female owners (21%). Approaching 2-in-5 Gen Z owners manage a social media account on behalf of their pets (36%) - 10 points higher than Gen Y owners (26%), and 25 points higher than Gen X owners, among whom just 11 percent manage a social media account for their pets. One-third of urban pet owners report managing a social media account on behalf of their pets (33%) compared to one-quarter of suburban pet owners (25%) and 11 percent of rural owners. Owners in the West are more likely to manage an account for their pets (29%) - 7 points higher than those in the South and Midwest (both 22%).

Do you manage a social media account on behalf of your pet(s)?



QUESTION 68

Do you manage a social media account on behalf of your pet(s)? n=1,001

## Attitudes Toward The Treatment Of Animals

When we asked pet owners how they feel about the treatment of animals, two-thirds told us they believe that animals deserve the same rights as people to be free from harm and exploitation (66%). This belief is held most strongly by Gen X, among whom over three-quarters agree. But there are some differences based on gender. While more than seven in 10 owners identifying as female agree, just over one-half of males do.

## Personhood for Pets?

A number of nations, including France, New Zealand, Canada, Sweden, and the UK already legally recognize animals as sentient - one of those main hallmarks of personhood. Spain recognizes pets as family members by law, so in the case of a divorce, the law requires custody decisions and that owners have to guarantee their pets' welfare.

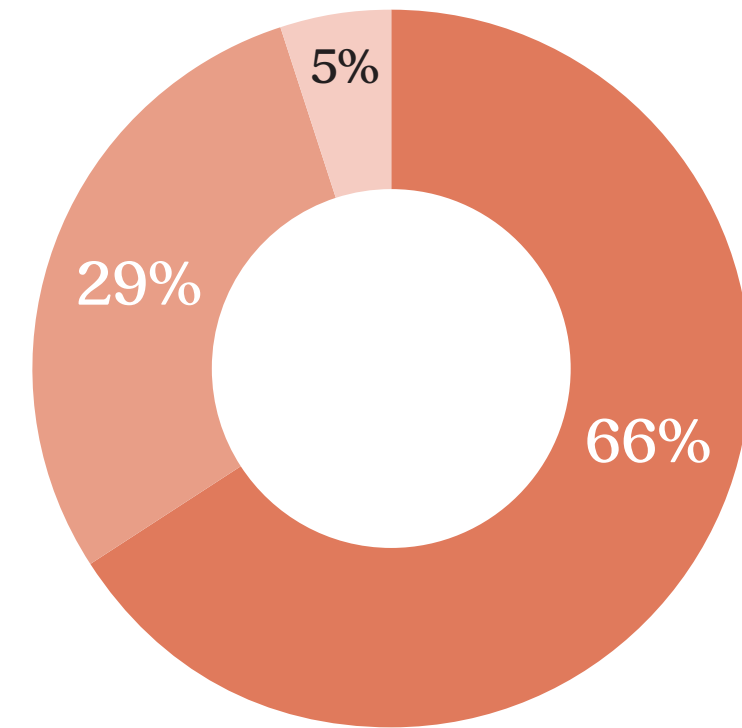
## So where are we headed? Could pets eventually be conferred legal rights akin to personhood? Or will they need a hybrid legal status as living property?

We don't know yet - but Bigeye will continue to track consumer behaviors and advancements in pet foods, products, and services as the relationship between the American family and its pets continues to evolve in the years ahead.

### QUESTION 71

Which of these statements best describes how you feel about the treatment of animals? Please select one. n=1,001

## Which of these statements best describes how you feel about the treatment of animals?



- Animals deserve the same rights as people to be free from harm and exploitation
- Animals deserve some protection from harm and exploitation, but it's still appropriate to use them for the benefit of humans
- Animals don't need much protection from harm exploitation since they are just animals

## What do these results tell us about the nature of social media and pet celebrities?

Social media is Gen Z's form of advertising. And to see that there has been this dramatic increase in pet influencers is not surprising, because there has just been this historical shift towards thinking of dogs and cats in particular, in terms of personhood. As a result, it's not strange to me to see Gen Z using social media in general and social media accounts for their animals, their pets to talk for and about their pets' lived experiences. But I think that trend is also a response to others within the same generation who are also viewing dogs and cats not just as valuable members of the family, but as valuable consumers. What I think advertisers have to focus on is advertising to our pets now, not advertising to us as their owners.

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## Conclusion

**As the results in this study illustrate, American owners overwhelmingly agree that their pets are members of the family.**

Shopping for pets presents owners with a wide array of foods, treats, and even special beverages. Their pets can sleep in customized beds, be pampered in grooming salons, and enjoy spa treatments. And even while rampant inflation has caused many Americans to change spending behaviors, owners are less likely to have changed the ways they purchase items for their pets than for the human members of their households.

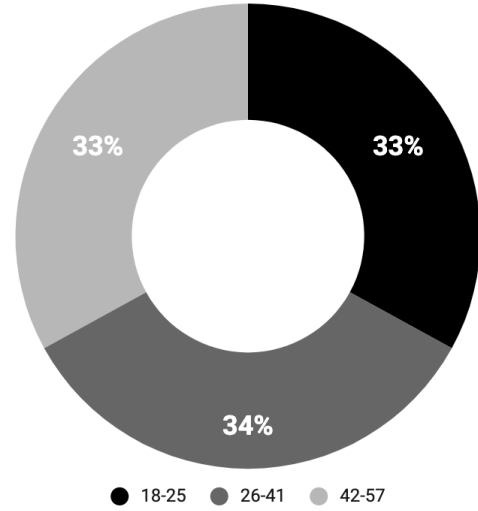
The trend toward humanization reflected in this study's results extends to insurance policies providing coverage for both pet's medical care and potential accidents. These family members are deserving of respect, dignity, safety – and certain rights. Pet-friendly laws in some states that allow companion animals access to public places such as restaurants, for example.



# 05

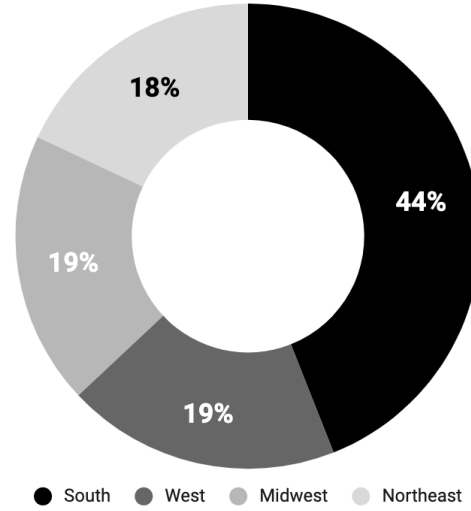
## Appendix: Respondent Demographics





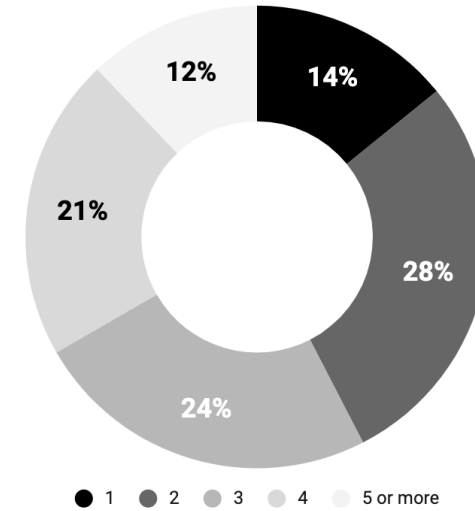
● 18-25 ● 26-41 ● 42-57

Q6 - What is your age?



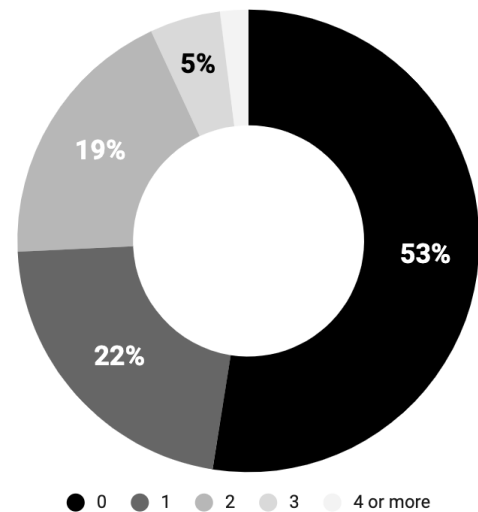
● South ● West ● Midwest ● Northeast

Q1 - (RECODE) US Region



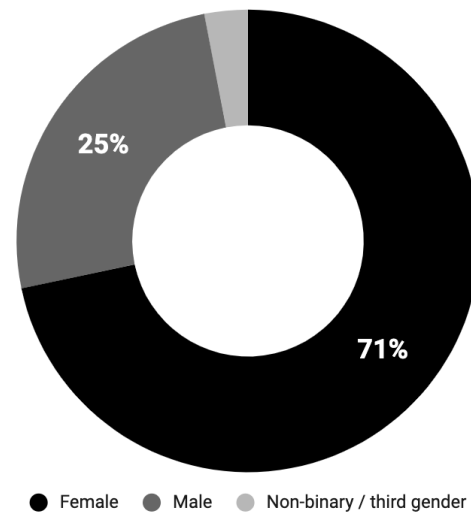
● 1 ● 2 ● 3 ● 4 ● 5 or more

Q72 - Including yourself, how many people are in your household (not including pets)?



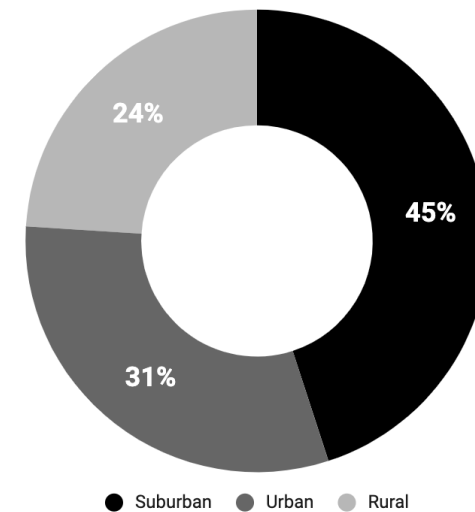
● 0 ● 1 ● 2 ● 3 ● 4 or more

Q73 - How many children aged under 18 are in your household?



● Female ● Male ● Non-binary / third gender

Q74 - How do you describe your gender identity?



● Suburban ● Urban ● Rural

Q77 - Which best describes the area where you live?

Own my home	<b>43%</b>
Rent my home	<b>38%</b>
Live with my parents	<b>10%</b>
Live with other family members	<b>4%</b>
Live with others not related to me	<b>2%</b>
Other	<b>2%</b>

**Q75** - Which best describes your current living situation?

Single, never married	<b>40%</b>
Married	<b>35%</b>
Cohabiting / domestic partnership	<b>12%</b>
Divorced	<b>9%</b>
Widowed	<b>2%</b>
Separated	<b>2%</b>

**Q78** - What is your relationship status?

High school, non-graduate	<b>4%</b>
High school graduate	<b>29%</b>
Some college, no degree	<b>25%</b>
Associate degree	<b>12%</b>
Bachelor's degree	<b>18%</b>
Advanced degree	<b>9%</b>
Prefer not to say	<b>1%</b>

**Q79** - Which best describes the highest level of education you have received?

Employed, working full-time	<b>49%</b>
Employed, working part-time	<b>15%</b>
Not employed, not looking for work	<b>14%</b>
Not employed, looking for work	<b>11%</b>
Not employed, student	<b>6%</b>
Not employed, retired	<b>5%</b>

**Q80** - Which best describes your current employment status?

No, I am not of Hispanic, Latinx, or Spanish origin	<b>80%</b>
Yes, Mexican, Mexican American, Chicano	<b>7%</b>
Yes, another Hispanic, Latinx, or Spanish origin	<b>5%</b>
Yes, Puerto Rican	<b>3%</b>
Prefer not to say	<b>3%</b>
Yes, Cuban	<b>2%</b>

**Q81** - Are you of Hispanic, Latinx, or Spanish Origin? Please select one.

White	<b>73%</b>
Black or African American	<b>19%</b>
American Indian or Alaska Native	<b>3%</b>
Chinese	<b>2%</b>
Filipino	<b>2%</b>
Other Pacific Islander	<b>2%</b>
Vietnamese	<b>1%</b>
Korean	<b>1%</b>
Japanese	<b>1%</b>
Other Asian	<b>1%</b>
Prefer not to say	<b>3%</b>

**Q82** - Which of these races do you identify with? Please select all that apply.

\$0 to \$24,999	<b>23%</b>
\$25,000 to \$49,999	<b>29%</b>
\$50,000 to \$79,999	<b>22%</b>
\$80,000 to \$99,999	<b>8%</b>
\$100,000 to \$149,999	<b>10%</b>
\$150,000 to \$199,999	<b>3%</b>
\$200,000 or more	<b>2%</b>
Prefer not to say	<b>3%</b>

**Q10** - To ensure we reflect the opinions of as many different people as possible, what was your total household income in 2021, before taxes? If you're not sure, please select your best guess.

**bigeye**

If you're in need of marketing for your pet product or service, please contact us.

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