1Q Pet Consumer Adoption Sentiment & Shopping Behaviors

March 2025

Important disclosures can be found in Appendix

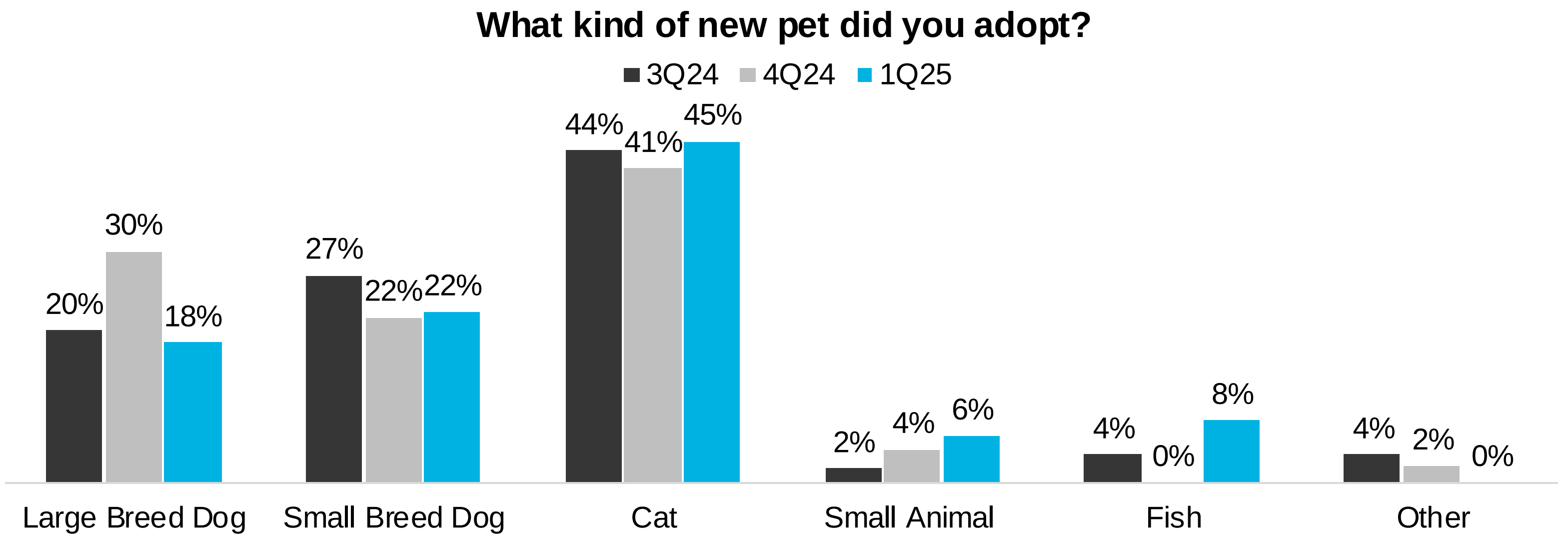
CRC's Take: We survey consumers quarterly to better understand their pet adoption sentiment and pet category shopping behaviors on a quarterly basis. Within our work, we continue to hear adoptions are expected to be ~flat in 2025. Our 1Q 2025 consumer survey responses provide additional color to that sentiment – namely, what pets are being adopted, reasons for deferring an adoption, etc. as the industry looks to spur pet household formation to drive growth.

This work then then dovetails into how consumers think of their pet spend and the resilience of the category. Have they noticed price increases? Are they pulling back on vet visits? Would they trade down to private label products?

This is part of a broader report our team put together, please reach out to Claire Obertin (cobertin@cleveland-research.com) or John Selio (jselio@cleveland-research.com) for more information and access to the full report.

Adoption Sentiment

Upon surveying 600 consumers on adoption sentiment (both existing pet parents and non-pet owners), roughly 47% of consumers have adopted or considered adopting a new pet in the last 12 months. 44% of those considering adopting a pet are more likely or much more likely to adopt a pet today than last year. According to our 1Q survey, 8% of consumers have adopted a new pet in the last year, with 45% adopting a cat, followed by small breed dogs and then large breed dogs.



- Cat continues to be a driver of innovation and growth across categories – consumables, supplies, and Rx – as manufacturers address the growing market
- We have heard brands switching packaging images from large to small dog breeds to be more cognizant of adoption trends
- Small animal usually spikes around tax return season – so stay tuned for further adoption insights on that space

Source: CRC Consumer Survey, January 2025

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Shopping Behaviors

On a scale of 1 strongly disagree to 5 strongly agree, we asked consumers how they think about spending habits as it relates to their pets' vet visits, consumables, private label spending, etc. Across statements, consumers are more price conscious when shopping / taking care of their pets – looking for cheaper food, Rx and supplies, waiting for promotions compared to 4Q, but also cutting back spend in other areas so they do not have to cut back on pet.

	1Q25	4Q 2024	3Q 2024	2Q 2024
Because of the higher prices on pet food, I will look for a cheaper pet food next time I purchase it	**3.00**	**2.93**	**3.17**	**3.06**
Because of the higher prices on pet supplies (i.e. – leashes, toys, beds, etc.), I will look for cheaper pet supplies next time I purchase them	**3.26**	**3.22**	**3.44**	**3.38**
Because of the higher prices on pet pharmacy, I will look for cheaper pet pharmacy products next time I purchase them	**3.14**	**3.11**	**3.31**	**3.19**
Higher prices will impact how quickly I take my pet to the vet	**3.04**	**2.96**	**3.20**	**3.06**
I plan to go to the vet less this year compared to last year to save money	**2.96**	**2.97**	**3.14**	**3.05**
I am more likely now to purchase a store brand pet product today than a year ago to save money	**3.30**	**3.15**	**3.39**	**3.19**
I am more likely to wait for a promotion or sale to purchase pet products than a year ago	**3.45**	**3.24**	**3.50**	**3.39**
I am cutting back in other areas so that I don't have to cut back on pet purchases	**3.31**	**3.08**	**3.46**	**3.39**

Source: CRC Consumer Survey, January 2025

1. Private Label Appetite Increases
- Amid continued macroeconomic pressures, pet owners appetite for private label increased quarter / quarter
- Private label continues to be a big topic at Walmart, Chewy and Pet Specialty retailers in 2025

2. Pet Parents Increasingly Waiting for Promotions
- Promotional cadence is largely flat year/year according to our work – which many have highlighted has trained the consumer to 'wait for promotions' and encourages bulk buying behavior
- We see this sentiment slightly uptick in 1Q vs 4Q based on our consumer data – likely coming off of impulse holiday purchases

3. Vet / Rx Sentiment Remains Steady
- Interestingly, sentiment around vet visits and pharmaceutical spend was largely in line in 1Q vs 4Q –
- Consumers agreeing that higher prices will impact how quickly they take their pets to the vet and will search for cheaper options for Rx products

4. Pet Continues to be Resilient
- Pet parents more strongly agreed they would look to cut back in other categories rather than in pet in 1Q vs 4Q
- We continue to see pet as the more resilient category in our broad consumer work, although if prices do decrease there is only a slight uptick in anticipated spend in the category

Claire Obertin, Market Research Associate

Claire is a Market Research Associate at Cleveland Research Company, leading the Pet Insights Council, where she communicates and identifies key insights across the Pet Retail and Animal Health channels. Prior to joining CRC, Claire worked for J.P. Morgan Asset Management. Claire holds a bachelor's degree in Supply Chain & Operations Management and Marketing from Miami University.

John Selio, Senior Research Associate

John joined Cleveland Research in 2016 and currently covers the pet specialty, mass, eCommerce, grocery, value, and club channels. Through regular conversations with industry professionals, his team uncovers inflection points and communicates best practices for how supplier and retailers deal with of their most challenging issues. John has over 1,000 conversations a year with many of the industry's thought leaders and enjoys aggregating the most relevant data points to tell a story of where the retail market is heading. John attended Miami University and currently lives in Cleveland, OH with his family.