4Q Pet Shopper Sentiment & Shopping Behaviors Headed into Peak Season

November 2025

Important disclosures can be found in Appendix

In conjunction with CRC's Advisory Services team, the Cleveland Research Pet Insights Council surveys consumers quarterly to better understand their macro spending habits, sentiment on category outlooks, engagement in retail channels, etc. Pet parents shopping behaviors in the category at large are improving slightly quarter/quarter – food, supplies, Rx, vet visits, private label appetite, etc.

We view these results as evidence of the resilience of the category given the macroeconomic turbulence experienced throughout 2025 coupled with consumer pullback taking hold through the beginning of the year. Within our work, we continue to hear adoptions are expected to be roughly flat through the remainder of 2025 and into 2026. The survey responses provide additional color to that sentiment – namely, interest in adoption but relatively flat adoption rates, timing of adoptions, reasons for deterring an adoption, etc. as the industry looks to spur pet household formation to drive growth.

This data output part of a broader report our team put together. Please reach out to Claire Obertin (cobertin@cleveland-research.com) for more information on Cleveland Research and the Pet Insights Council and how to gain access to the full report.

Key Consumer Considerations Wrapping up 2025

Consumers Considering Adopting a Pet Steady Quarter / Quarter

- 51% of consumers have either adopted a pet or considered adopting a pet so in the last year, according to 4Q results; this compares to 50% in our 3Q results, relatively in line with historical trends
- To that end, 10% of consumers have adopted a pet in our latest survey, which compares to 8% in 4Q 2024

Pricing Increases are Not Inhibiting Pet Spend Through the End of the Year

- Roughly 20% of pet category shoppers have noticed higher prices in the category in year to date, however when asked about spend through the end of the year, less than 10% of shoppers anticipate cutting back on pet category spend
- In our work, we do not see tariff price increases impacting a majority of consumers' intentions around pet adoption

Consumer Pet Spend Improves Quarter / Quarter

- Pet parents shopping behaviors in the category are improving quarter / quarter, with the most notable change in supplies related spend
- Consumers noted a slight pullback in private label appetite as well as not waiting for a promotion to purchase pet products in 4Q compared to prior quarters

Source: CRC Consumer Surveys

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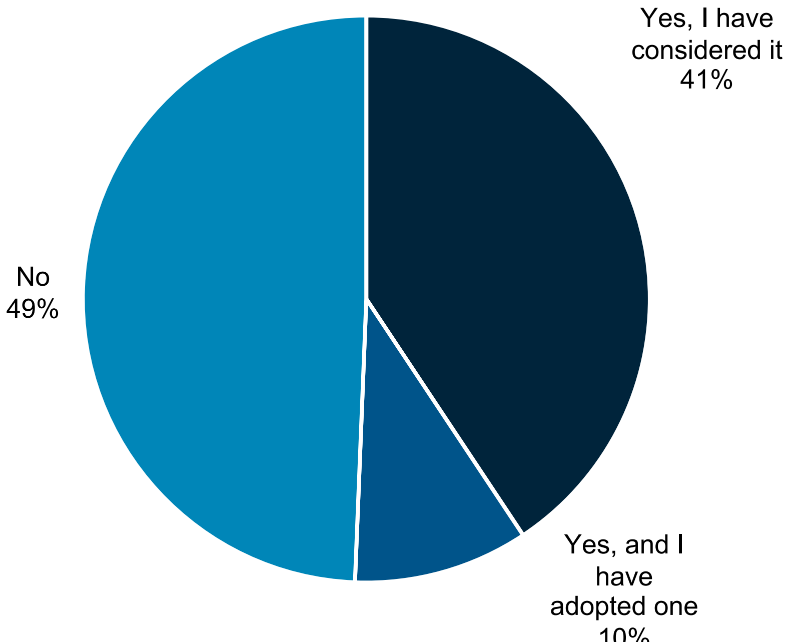
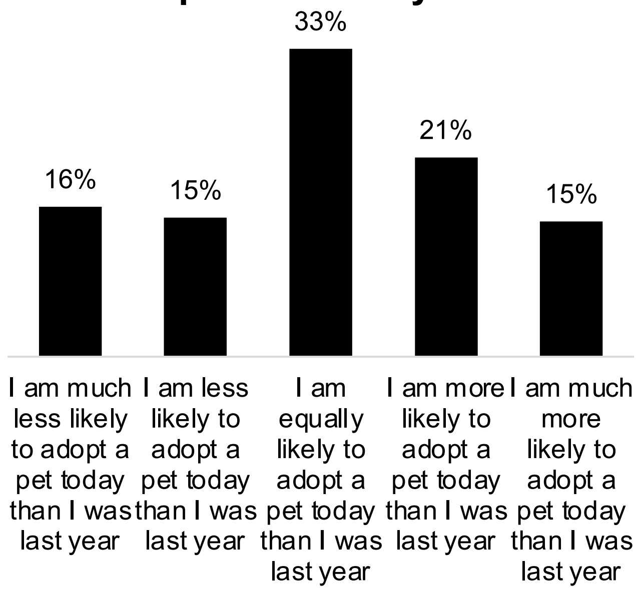
1. Consumers Considering Adopting a Pet Steady Quarter / Quarter

Have you considered adopting a pet in the last year or so?



Of the 41% who have considered adopting a pet…

Are you more or less likely to adopt a pet today compared to last year?



Source: CRC Consumer Survey, October 2025

In surveying both existing pet parents and non pet parents, we asked consumers their appetite and intention around pet adoption in the last year. Interestingly, 36% of consumers are more likely to adopt a pet this year compared to last year, which compares to 65% of consumers in 3Q, although we did not see a spike in the actual number of consumers who did adopt a pet quarter / quarter. When we look at pet adoptions, we still see cat adoptions outpacing dog – giving retailers and brands optimism on innovation portfolios and cat parent targeting opportunities in 2026.

Among consumers who have not yet adopted a new pet in the last year, but considered it, the delay was largely attributed to the expense of a new pet, followed by pet availability and the level of responsibility in caring for a new pet.

2. Pricing Increases are Not Inhibiting Pet Spend Through the End of the Year

Headed into the peak holiday season, we asked consumers which categories they have noticed higher prices in compared to the beginning of the year. This is in line with our prior work, with 22% of consumers noting increased prices in Pet. For context, this compares to 57% in perishable food, 57% in dry grocery, and 51% in dining out.

In tandem, we then asked consumers if they plan to decrease spending in any categories through the end of the year. Only 9% of consumers cited cutting back pet spend, which compares to 50% of consumers planning to cut back on dining out, 40% on sweets, and 35% on apparel. This again signals the resilience of the pet category in aggregate – despite more consumers noticing price increases year to date, they are largely not cutting back on category spend.

Headed into 2026, within our work, we are hearing of low single digit price increases from consumables brands given commodity pricing in more premium offerings – poultry, beef, etc. – as well as labor from an operational standpoint. We will continue to monitor how these increases impact consumer demand.

3. Category Sentiment Improved Quarter / Quarter

On a scale of 1 strongly disagree to 5 strongly agree, we asked pet shoppers how they think about their spending habits as it relates to their pets across categories, in light of total household spend, promotional appetite, etc. Across statements, consumer sentiment is improving quarter / quarter, with the most notable change in supply related spend, a pullback in private label appetite, and consumers waiting less for a promotion to purchase pet products.

	4Q 2025	3Q 2025	2Q 2025	1Q 2025
Because of the higher prices on pet food, I will look for a cheaper pet food next time I purchase it	**2.90**	**2.94**	**2.94**	**3.00**
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	**3.24**	**3.33**	**3.31**	**3.26**
I am more likely now to purchase a store brand pet product today than a year ago to save money	**3.11**	**3.37**	**3.35**	**3.30**
I am more likely to wait for a promotion or sale to purchase pet products than a year ago	**3.19**	**3.32**	**3.32**	**3.45**
I am cutting back in other areas so that I don't have to cut back on pet purchases	**3.11**	**3.24**	**3.23**	**3.31**

Source: CRC Consumer Survey, October 2025

We are seeing consumers still likely to purchase a store brand to save money, wait for a promotion or sale, and cut back in other areas so as not to decrease pet spend – just at a decreased rate than the last three quarters. Our work is pointing to a slightly optimistic holiday outlook for the pet category given inventory positioning at large retailers, dedicated marketing dollars from brands to fund holiday promotions, and a slightly improved consumer sentiment.

[1]Cleveland Research Consumer Panel

	SEGMENT	% OF SAMPLE	COUNT
GENERATION	Gen Z	16%	100
	Millennials	33%	198
	Gen Xers	33%	199
	Baby Boomers	18%	111
GENDER	Male	44%	269
	Female	56%	338
PET	Pet Owners	64%	388
	Dog Owners	48%	289
	Cat Shoppers	33%	202

Source: CRC Consumer Study, October 2025

Claire Obertin, Director

Claire leads the Pet Insights Council at Cleveland Research Company. Claire joined the firm in 2022, and has been working alongside industry experts, pet and animal health vendors, and retail thought leaders to understand vendor best practices and consumer trends as it relates to all things pet. 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.

APPENDIX