



TRENDS REPORT

Paw Power:

Pet Purchasing Trends



PET PURCHASING About the Report

NUMERATOR'S PAW POWER: PET PURCHASING TRENDS report breaks down the continued growth of the pet industry in a post-COVID world and shares inspiration on how brands and retailers can maintain that growth.

Using Numerator's Total Commerce panel of over 150k panelists across both digital and physical collection methods, we analyzed purchasing and attitudinal behaviors among the following groupings:

- Pet Food & Treats
- Pet Supplies

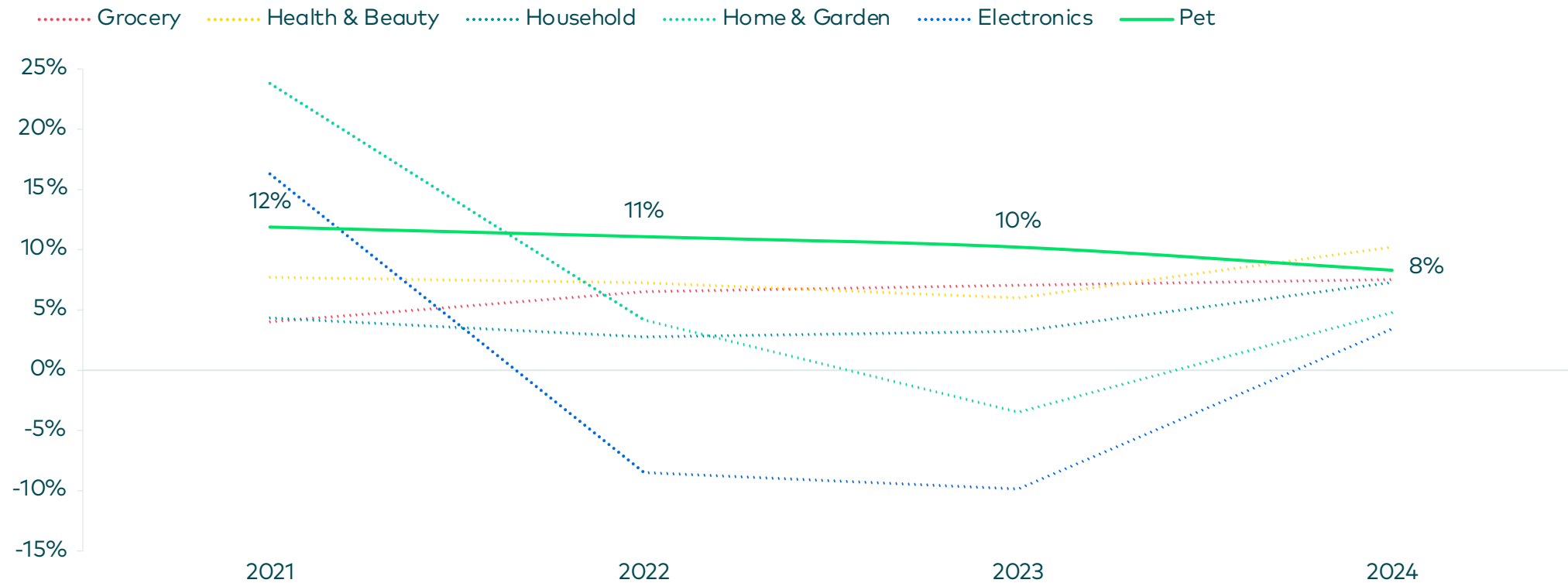
All analyses was conducted looking at latest 12 months ending 8/31/2024 unless otherwise noted.



Pet sales have grown strong for several years but is slowing.

PET SALES GROWTH BY SECTOR

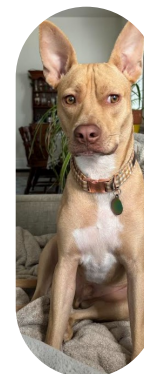
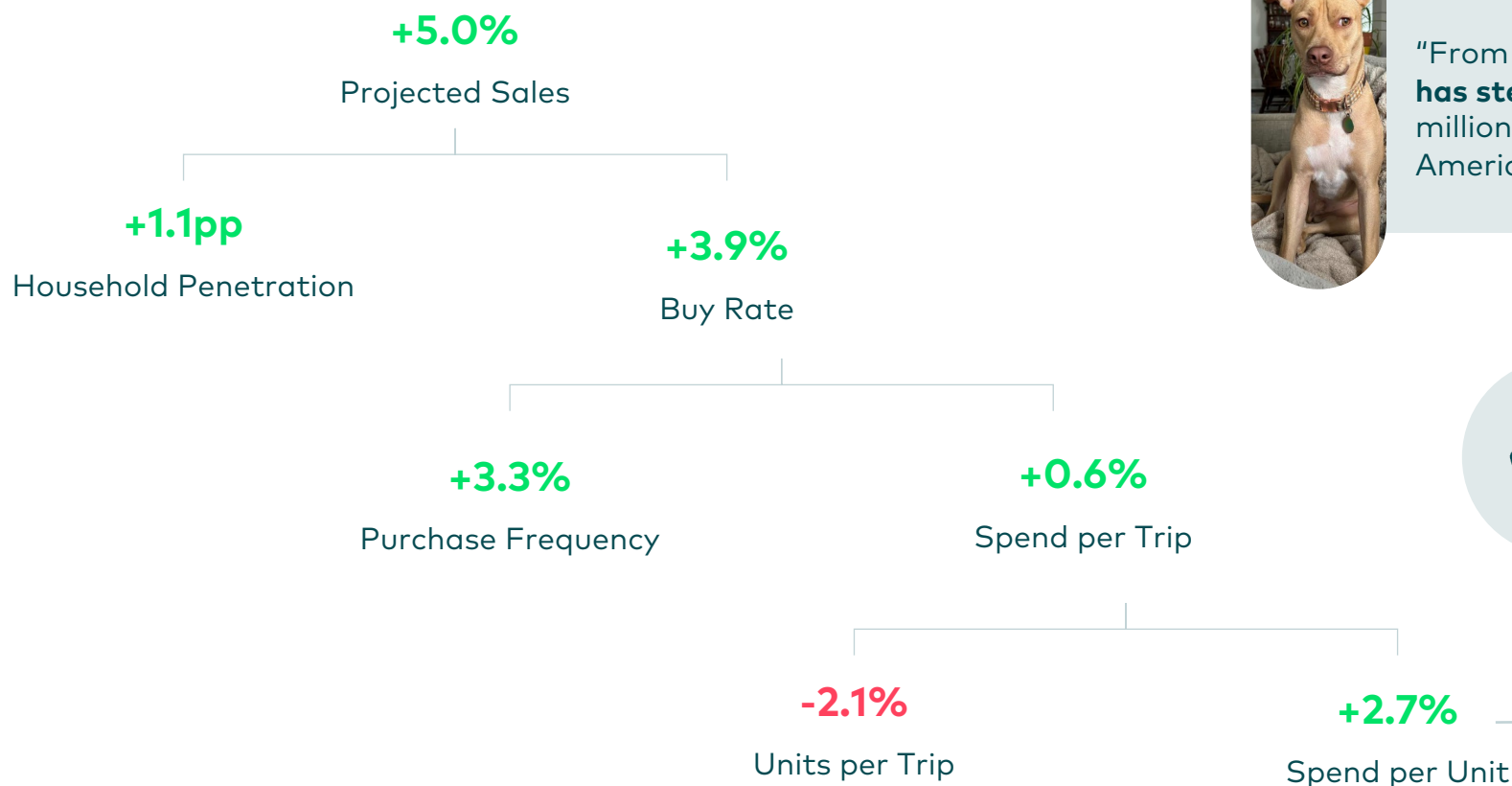
Projected Sales % Change vs YA | Rolling 12 Months Ending 8/31/2024



Households continue to enter the pet sector, but consumers are becoming choiceful in what they buy.

PET SECTOR SALES DECOMPOSITION

Latest 12 Months Ending 08/31/2024 vs Year Ago



"From 1996-2024, the dog population has steadily increased, from 52.9 million to a new peak of 89.7 million." American Veterinary Medical Association



Driven by mix over inflation
July's CPI for Pet Products: +0.8%¹

Four key trends impacting the pet sector.



PETS AND PRICE TAGS

Pet ownership is becoming more challenging as return-to-office mandates, shifting priorities, and rising pet care costs strain budgets. Brands and retailers must pivot to address these pressures, offering value-driven solutions that resonate with constrained pet parents.

Private-label pet foods and treats are thriving, combining premium appeal with affordability to meet demand. At the same time, the pet wellness sector is expanding, highlighting growing attention to pets' health and preventive care that retailers must catch up to.

[LEARN THE STORY](#)

WELLNESS UNLEASHED

Pet parents are pampering their furry friends, driving growth in health and wellness products. Despite cost pressures in the pet sector, many owners prioritize high-quality toys and wellness goods for their pets.

Brands tapping into human health trends, like gut health, have found success, with Boomers leading the way and Gen Z offering room for growth. Brands can find growth in both traditional wellness and emerging wellness such as mental health and enrichment toys.

[LEARN THE STORY](#)

PAWING THROUGH THE AISLES

General retailers are thriving as pet specialty stores lose share to giants like Amazon and Walmart. Amazon stands out by winning shoppers with price, convenience, and promotions.

Specialty pet retailers face mounting challenges as mass retailers and e-commerce dominate. To stay competitive, they must refine promotional strategies and foster loyalty among new pet parents.

[LEARN THE STORY](#)

GEN Z(OOMIES)

As Gen Z steps into their spending power, they're reshaping the pet market in unique ways. While budget-conscious, this generation craves experiences—and nothing draws them in quite like a store where their pets can join the fun.

For many Gen Z pet owners, urban living and renting in multi-unit complexes mean cats often take center stage. By speaking to their lifestyle and values, brands have a chance to win the loyalty of these next-gen pet parents.

[LEARN THE STORY](#)



 Numerator

PAW POWER: PET PURCHASING TRENDS

Pets and Price Tags

While growth continues, headwinds can be expected as a cycle of ownership is expected to hit a slowdown.

Americans adopted millions of dogs during the pandemic. Now what do we do with them?

Washington Post, 2022

NYC animal shelters are overcrowded with dogs, and few people are adopting them

Gothamist, 2024

Petco Cites Consumer Spending Pressures, Cuts 2023 Guidance

Kiplinger, 2023

Retailers PetSmart, Petco Feel Pinch of Weaker Pet Spending

Bloomberg, 2023

A weaker 2025 for pet ownership could be anticipated especially among lower income households.

SHARE OF PET OWNERS NOT LIKELY TO ADOPT ANOTHER PET

% of Respondents



13%

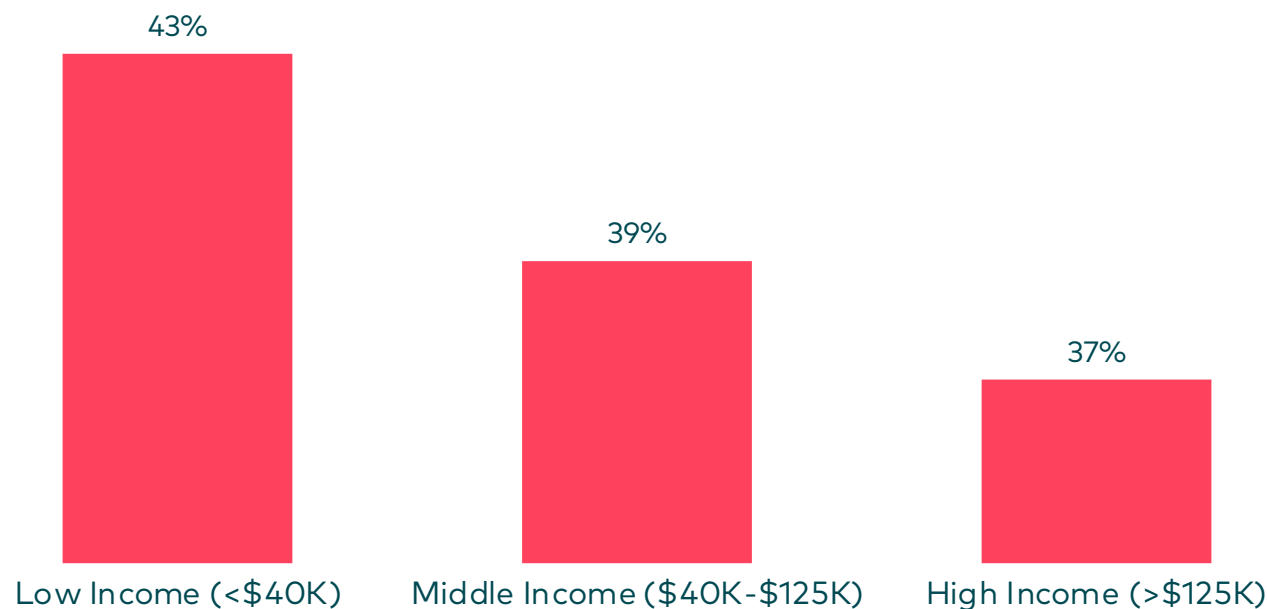
Are **more likely** to add a pet now compared to two years ago.

Yet...



40%

Are **less likely** to add a pet now compared to two years ago.

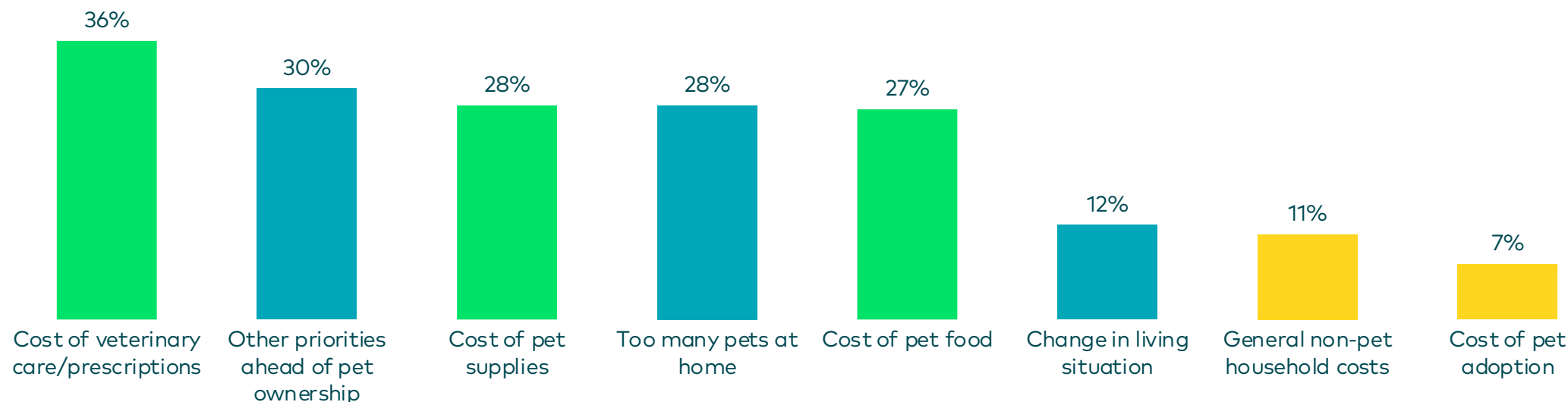


Overall pet costs from vet care to pet supplies is driving a decline in adding another pet to the house.

REASONS FOR BEING LESS LIKELY TO ADD ANOTHER PET TO HOUSEHOLD

% of Respondents

■ Cost of pet needs ■ Other household priorities ■ Upfront cost and other price factors



Source: Numerator | N=1035

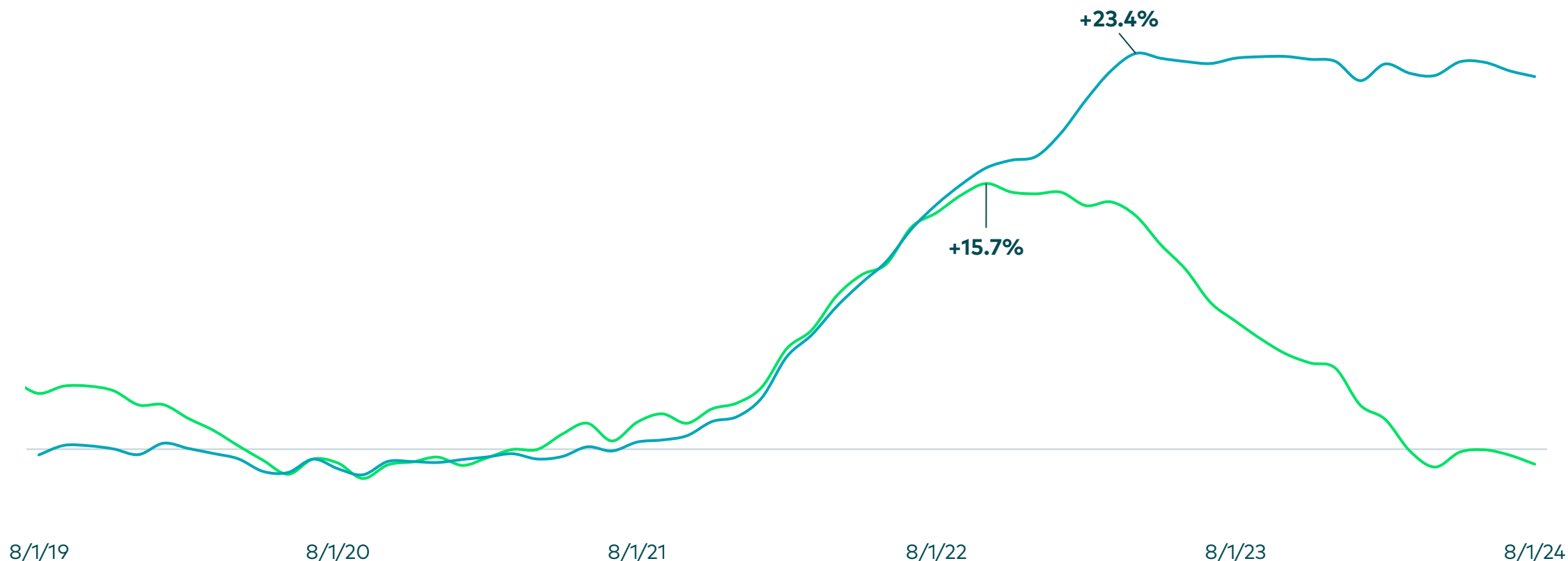
Q. Why are you less likely to add pets to your household compared to two years ago? Select all that apply.

While base price inflation for pet food has slowed, prices remain elevated.

PET FOOD CONSUMER PRICE INDEX

Monthly Inflation

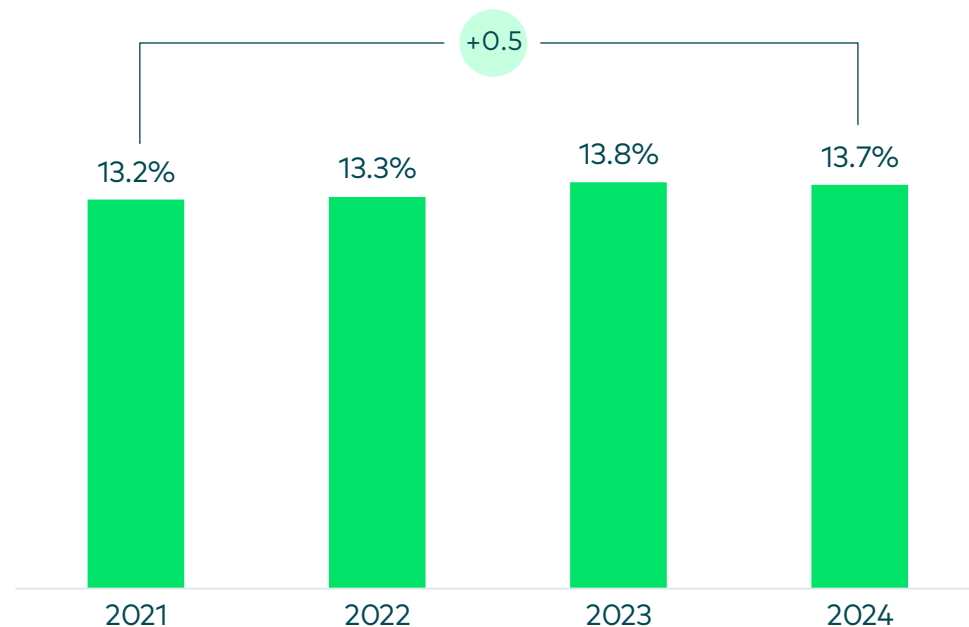
— % Chg from LY — Cumulative Change



With higher prices, consumers are shifting back to private label for pet food & treats but not supplies.

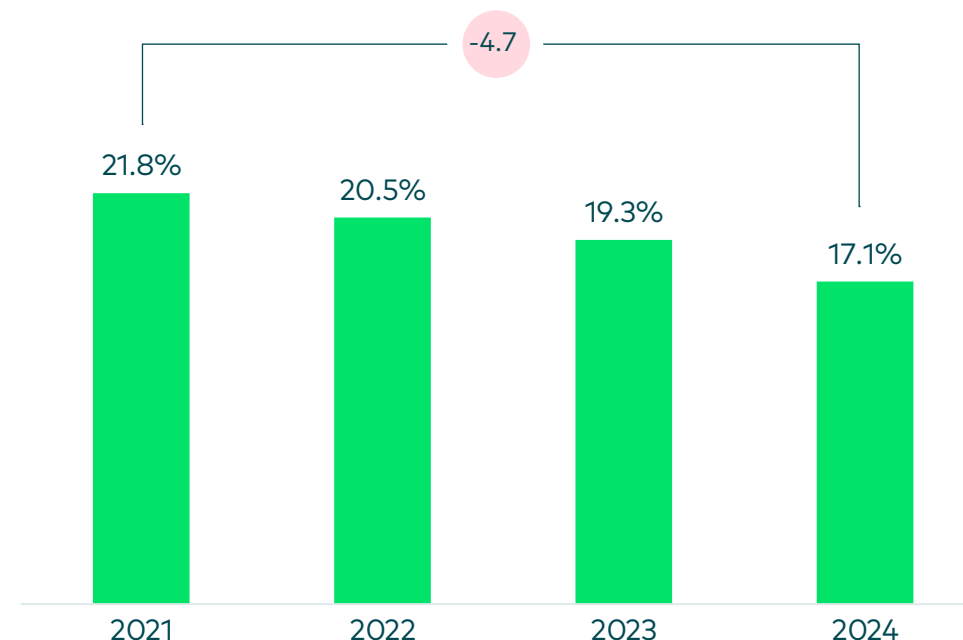
SHARE OF PRIVATE LABEL IN PET FOOD & TREATS

% of Spend | Latest 12 Months Ending 7/31/2024



SHARE OF PRIVATE LABEL IN PET SUPPLIES

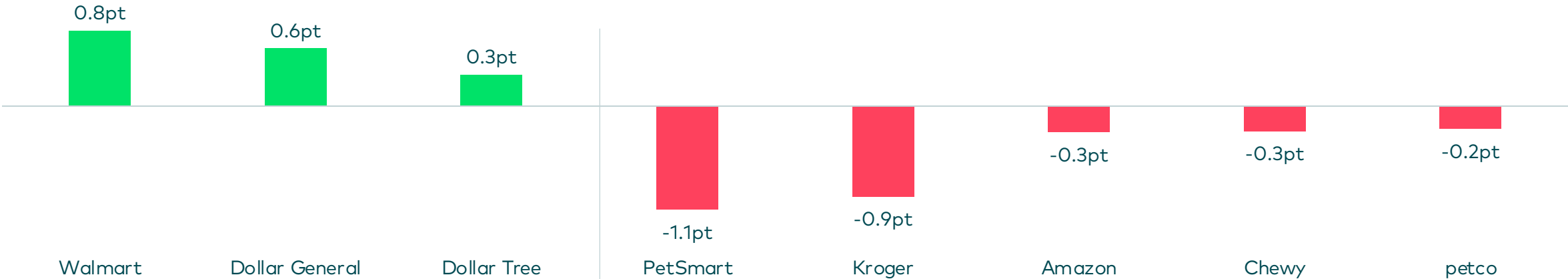
% of Spend | Latest 12 Months Ending 7/31/2024



Although private label pet food has grown, consumers are trading down to lower absolute cost.

PRIVATE LABEL PET FOOD AND TREATS HOUSEHOLD PENETRATION CHANGE (IN PERCENTAGE POINTS)

Latest 12 Months Ending 08/31/2024 vs YA



SPEND PER UNIT ON PRIVATE LABEL DOG FOOD & TREATS

Category Average: \$7.85

Below average Above average

\$5.97 \$3.57 \$2.25 \$8.58 \$6.33 \$19.16 \$16.75 \$9.30

However, consumers likely don't perceive the trade down given recent private label branding.

PRIVATE LABEL PET FOOD BRAND COMPARISON

Based on Household Penetration | Latest 12 Months Ending 08/31/2024 vs Year Ago

WALMART



GOLDEN REWARDS

Walmart's Golden Rewards offers a variety of dog snacks, including jerky treats, chews, and biscuits. It is positioned as an affordable yet indulgent option for pet owners by emphasizing high-protein content and natural ingredients. The brand is step-up from their cheaper Vibrant Life line and has grown penetration by 0.7pts.

DOLLAR GENERAL



HEARTLAND FARMS

Heartland Farms has grown both penetration and purchase frequency in the last year. On a brand level, Heartland Farms has gained \$2.3M from Pedigree Adult.

Heartland Farms branding is not tied to Dollar General and advertises "Complete" and "Balanced" nutrition for dogs.



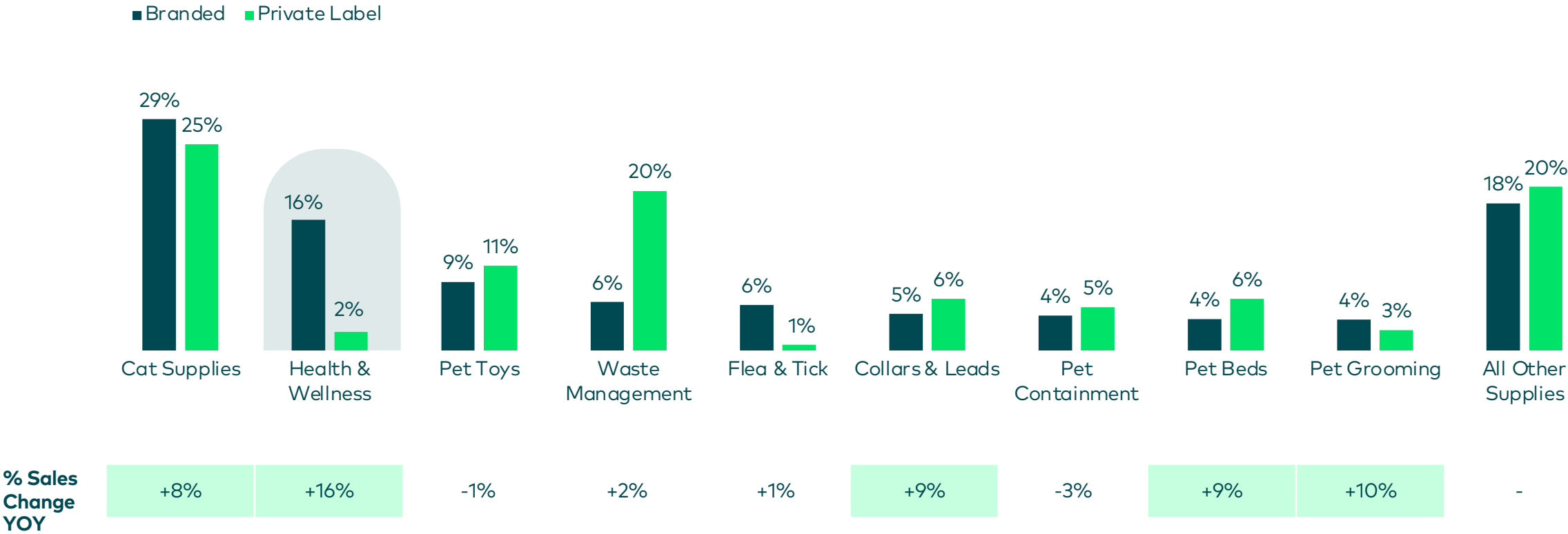
ASHLAND FARMS

Family Dollar's Ashland Farms pet food has grown 0.7pts HHP and 4.5% in annual buy rate.

Ashland Farms branding is explicitly "premium" and natural and not tied to Family Dollar branding, giving it the appearance of a non-private label product

Private label's decline in pet supplies stems from a broader shift towards pet wellness that retailers have not focused on.

% OF PROJECTED SALES BY PET SUPPLIES MAJOR CATEGORIES
Latest 12 Months Ending 8/31/2024



Inspiration for Pets and Price Tags.



PREMIUMIZE TO GROW

With pet owners increasingly hesitant to add another pet to their household due to the rising upfront and ongoing costs of supplies and food, brands must focus on driving growth through their existing customer base. Expanding the category will require identifying and capitalizing on whitespace opportunities and emerging trends that encourage pet owners to invest more in their pets.

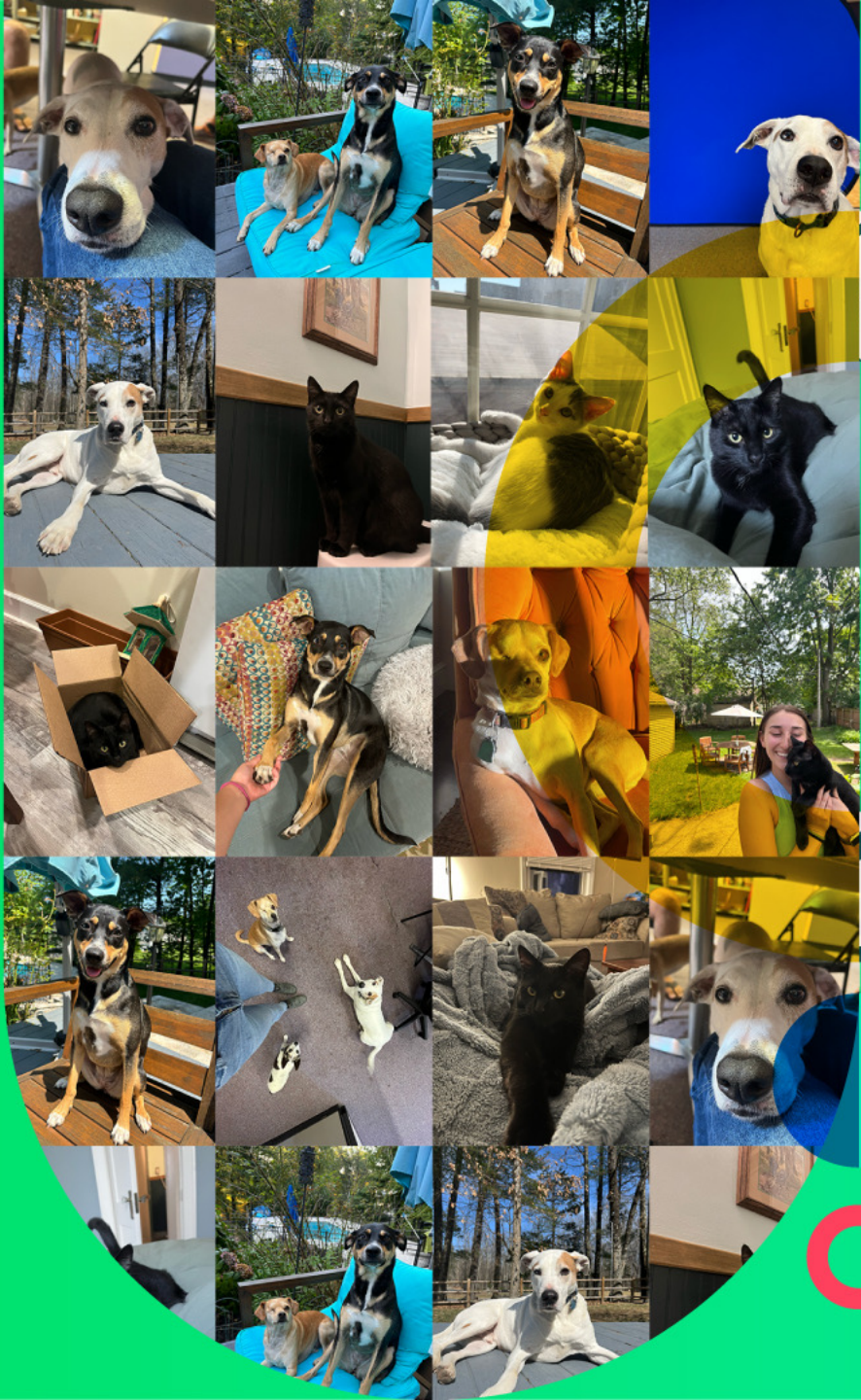
This could include premium offerings such as higher-quality food or new ventures into the expanding world of pet wellness, which will be explored further in the next section of the report.



A PRIVATE LABEL DUALITY

The private label pet industry is experiencing a split trajectory, with growth in pet food and treats but decline in pet supplies. In the pet food and treats segment, private label brands with premium positioning at budget-friendly retailers like Walmart and dollar stores are gaining traction. In contrast, private label pet supplies are losing market share as retailers fall in keeping pace.

To navigate this duality, brands must first defend their position in pet food and treats to secure shelf space and maintain visibility. They also have an opportunity to collaborate with retailers to revamp private label offerings in the pet supplies segment. Retailers should focus on refreshing their private label branding to better align with current trends while maintaining affordability. Entering the wellness space could also provide a pathway for retailers to capture a larger share of this growing market.



PAW POWER: PET PURCHASING TRENDS

Wellness Unleashed

Health & wellness products are experiencing the fastest growth within the pet sector.

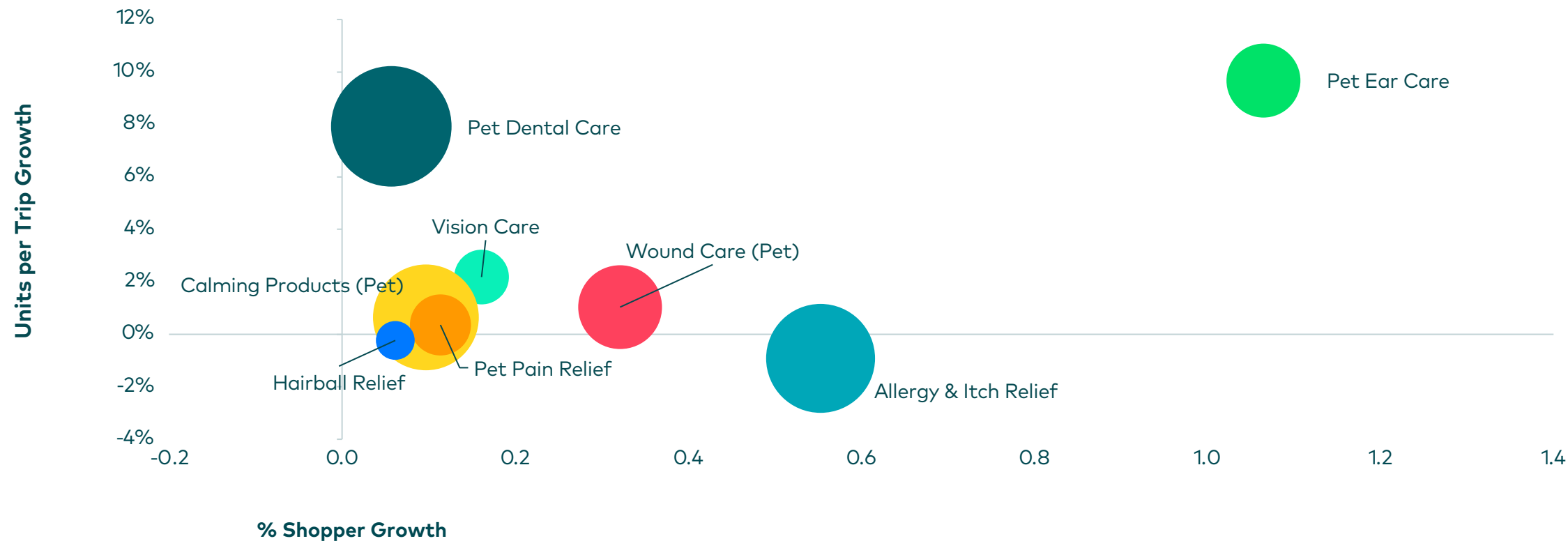
TOP GROWING PET CATEGORIES AMONG PET OWNERS
Latest 12 Months Ending 08/31/2024 vs Year Ago

Category		% Of Pet Owners	Buy Rate
	Health & Wellness	+1.8pts	+9.2%
	Waste Management	+0.8pts	-1.5%
	Cat Supplies	+0.7pts	+5.8%
	Cat Food & Treats	+0.5ptss	+5.9%

Source: Numerator
Top Categories based off greatest % of Pet Owner YoY Growth

And nearly all categories are seeing both new and existing customers drive growth.

TOP PET HEALTH & WELLNESS CATEGORIES
12 Months Ending 08/31/2024



Source: Numerator
Bubble Size = projected sales in the last 12 months ending 8/31/2024

Pet shoppers aren't just focused on one health need– they are buying across the board with dental care being the entry point.

PET HEALTH & WELLNESS CATEGORIES AND BRANDS PURCHASED

12 Months Ending 08/31/2024



46%

of Pet Wellness shoppers purchased more than 1 wellness category.



2.5

Average number of Pet Wellness brands pet owners purchased in the last 12 months.



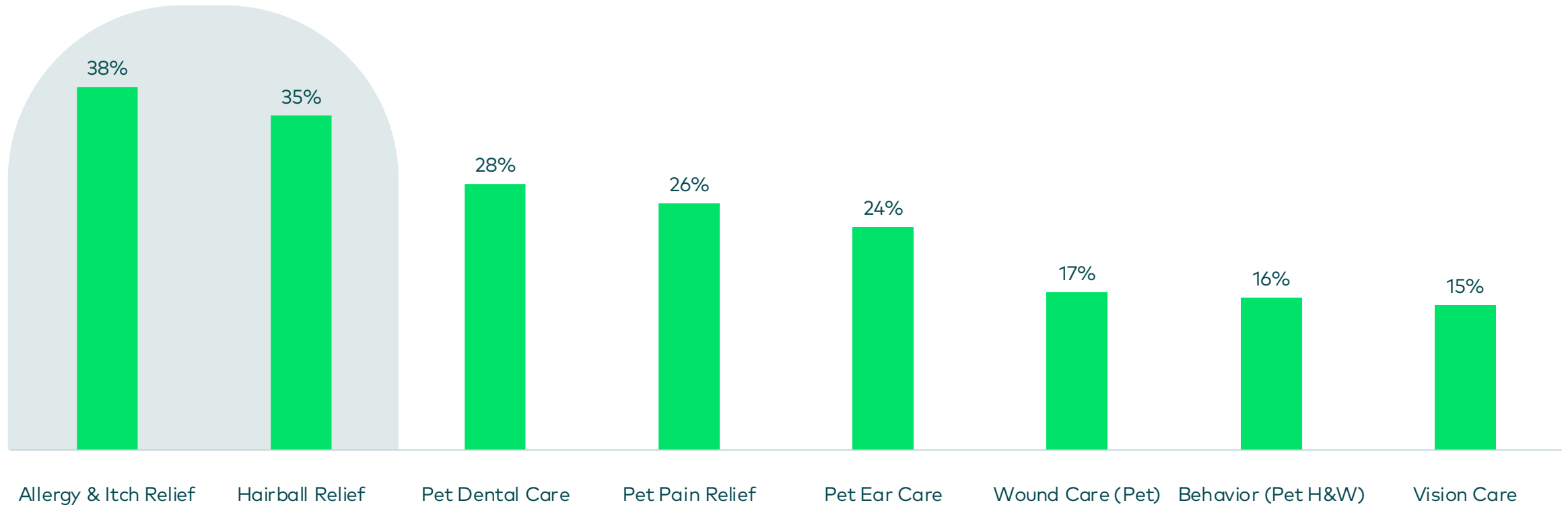
1 in 2

Shoppers who purchased just one Health & Wellness category purchased a form of Pet Dental Care.

Categories focused on pet skin care are driving the growth.

PROJECTED SALES CHANGE YEAR AGO ACROSS CATEGORIES

Latest 12 Months Ending 08/31/2024 vs Year Ago



Many fast-growing pet skin care products are being marketed with gut health in mind– a trend also found in human health.

TOP GROWING ALLERGY & ITCH RELIEF AND HAIRBALL RELIEF BRANDS

Latest 12 Months Ending 08/31/2024 vs Year Ago | Select List of Brands



Learn more about digestive health in our [Health Trends for 2024 & 2025](#) article.

Pet wellness shoppers are typically older, high-income couples.

PET WELLNESS SHOPPER

% of Pet Wellness Shoppers vs. Overall Pet Sector Shoppers



Gen X
33%, 109 Index



Rural
32%, 108 Index



White/Caucasian
74%, 111 Index



No Children
73%, 101 Index



High Income (\$125k+)
31%, 109 Index



Adult Couples
22%, 120 Index



Pet Subscription
9%, 147 Index



The percentage of adults living without children has risen by 19 points since 1967.¹ Known as DINKs (Dual Income, No Kids), this growing group is also likely to own pets, with 72% of DINKs having a pet.

Top Dog Ailments

Allergies
25%, 114

Anxiety /
Stress
16%, 115

Arthritis /
Hip Issues
13%, 113

Top Cat Ailments

Weight
Issues
8%, 111

Allergies
8%, 106

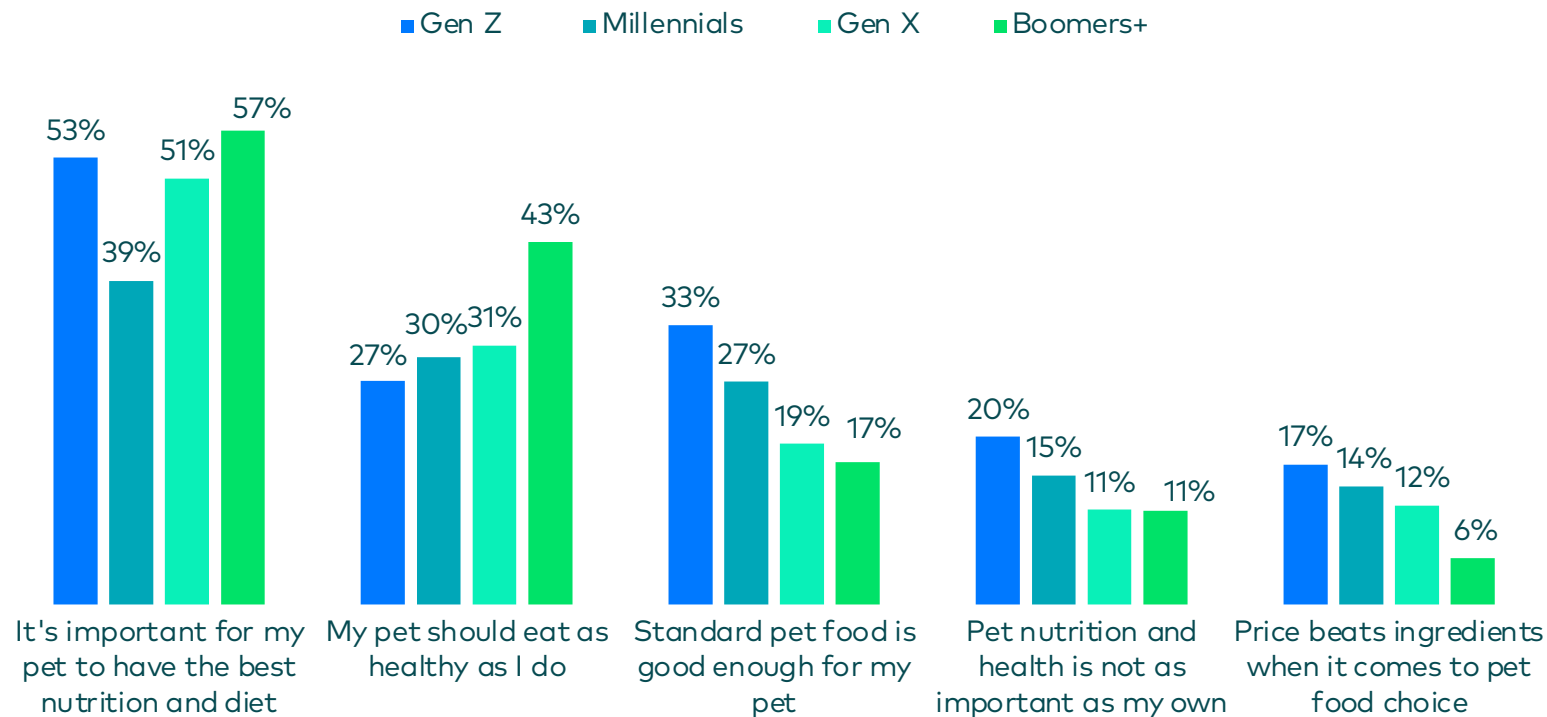
Anxiety /
Stress
7%, 106



Older pet owners view their pets as members of the family.

PET HEALTH & WELLNESS IMPORTANCE

% of Respondents



In Their Own Words

"We love animals and **consider them to be a part of our family**. Our cats are all rescues. We added each one knowing that we were saving their lives. Each cat has brought joy and love into our household."

"Because I always grew up with a pet and I see a pet more than just a pet. **I see them as family** so that's the reason why I have a cat and a bird. Having a pet just makes me feel complete."

Brands will need to drive more occasions among younger consumers to further grow health & wellness.

PET WELLNESS SPEND METRICS
Latest 12 Months Ending 08/31/2024

Z Gen Z & Millennials have a similar price tolerance compared to other generations. Brands should tap into their values to drive purchase occasions to grow purchasing.

Age Generation	Buy Rate	Purchase Frequency	Spend Per Unit
Gen Z	\$69.38	3.5	\$14.49
Millennial	\$101.70	4.4	\$17.06
Gen X	\$109.47	5.0	\$16.01
Boomers+	\$101.77	5.0	\$14.53

Source: Numerator
Health & Wellness Pet also includes Dog Dental Chews and Cat Dental Treat

Beyond physical health, consumers are considering how they take care of their pet's mental health through enrichment toys.

CONSUMER PERCEPTION OF MOST INTERESTING PET TRENDS BY GENERATION

% of Respondents | Among Pet Owners

Ranking	Gen Z	Millennials	Gen X	Boomers+
1	Enrichment Toys	Dental Hygiene Products	Enrichment Toys	Dental Hygiene Products
2	Sustainable Pet Products	Enrichment Toys	Dental Hygiene Products	Grooming Devices
3	Grooming Devices	Grooming Devices	Grooming Devices	Smart Feeders, Water Bowls, and Litter Boxes

Source: Numerator | Survey fielded October 2024 N=1,034
Q. Which of the following pet health and wellness trends interest you the most? Select all that apply.

As pet wellness becomes a priority, brands should look to specialize in these demand spaces to drive growth.

GROWING PET WELLNESS BRANDS

Pet Owner Projected Sales Indexed to Year Ago

Grooming and Enrichment

Grooming kits keeps pets looking their best with minimal mess, while treat-dispensing toys engages pets in active play, helping prevent boredom. By supporting both physical upkeep and mental enrichment, these products ensure pets stay healthy, happy, and entertained.



OneisAll
124 index



Barkbox
157 index

Pet Dental Care

With a variety of options designed to suit different preferences including dental wipes, water additives, and powder. These pet dental products provide convenient, effective, and gentle ways to support oral hygiene, ensuring your pet's mouth stays fresh, clean, and healthy.



HICC Pet
1533 index



Petlab Co.
278 index



Proden
160 index

Inspiration for Wellness Unleashed.



HUMANIZE PET HEALTH

Consumers are fully invested in their pets' well-being, from purchasing supplements to managing dental and ear care, and this movement shows no signs of slowing. Some of the fastest-growing brands and categories initially focused on skin and coat health, but an emerging trend highlights the importance of gut health—closely mirroring concerns seen in human wellness. This parallel allows pet owners to empathize with the issues their pets face, making it easier for brands to connect on a deeper level.

To stay competitive, brands should continue prioritizing high-growth areas while expanding their offerings to address challenges that resonate with human experiences, such as anxiety or joint pain.



PRIME THE NEXT GENERATION

Wellness products for pets must be tailored to the distinct needs and priorities of different generations. Younger pet owners often seek cost-effective solutions that offer value for money, while older generations are more inclined to invest in premium products that promise enhanced health benefits.

To foster deeper connections with pet owners, brands should emphasize the emotional bond between people and their pets by showcasing wellness products that reflect their values and the notion of pets as family members and extend into other pet ailments. Education is needed among younger consumers to showcase the value of investing in their pet to save costs in the future.



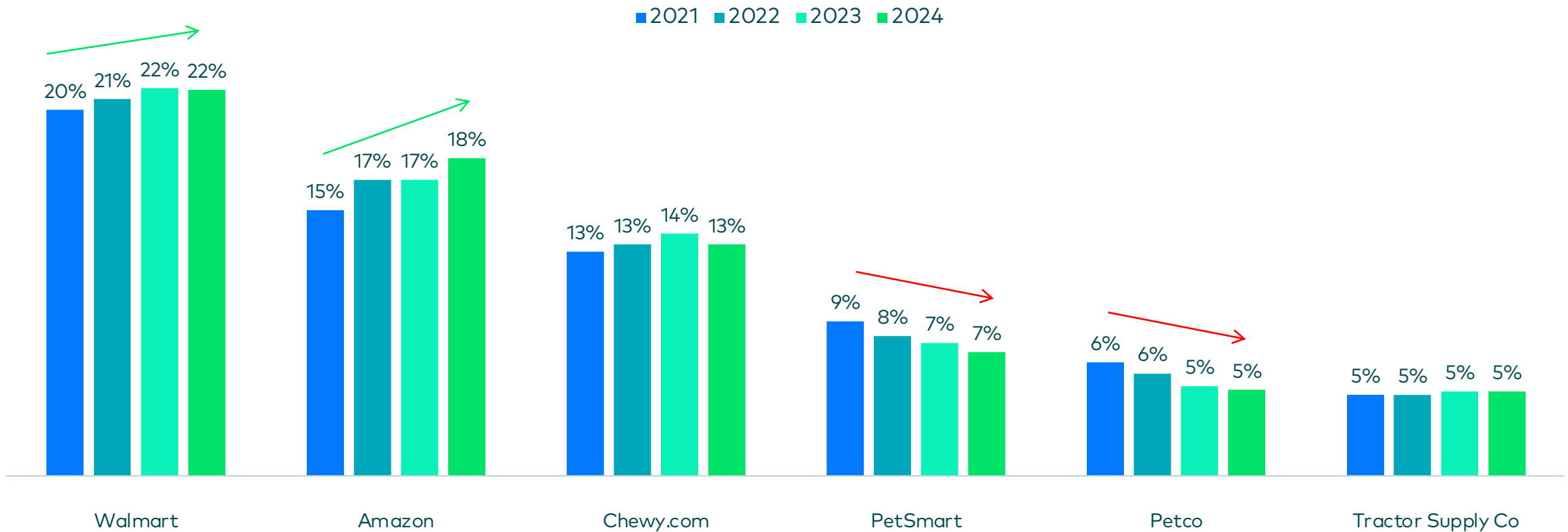
PAW POWER: PET PURCHASING TRENDS

Pawing Through the Aisles

Amazon and Walmart has been the beneficiary of shopper shifts within pet- growing share compared to 2021.

PET SECTOR DOLLAR SHARE BY RETAILER

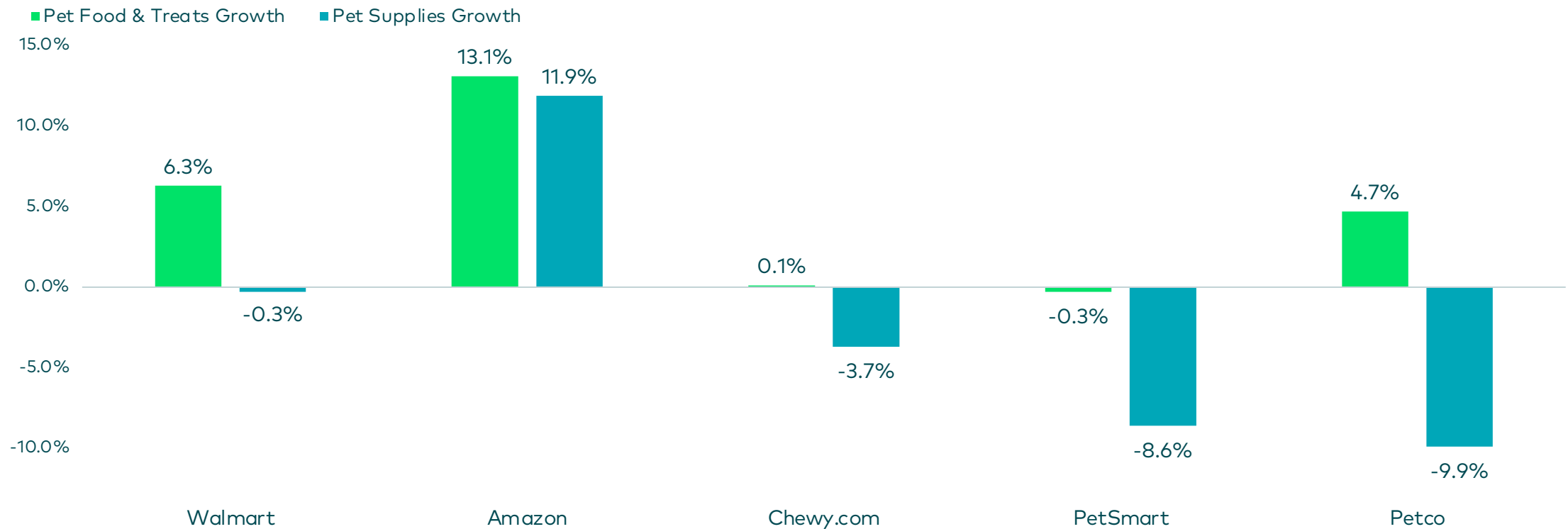
Latest 12 Months Ending 8/31/2024



Traditional pet retailers have lost in pet food and supplies while Amazon and Walmart have seen growth outpace any declines.

PET DEPARTMENT SALES GROWTH ACROSS RETAILERS

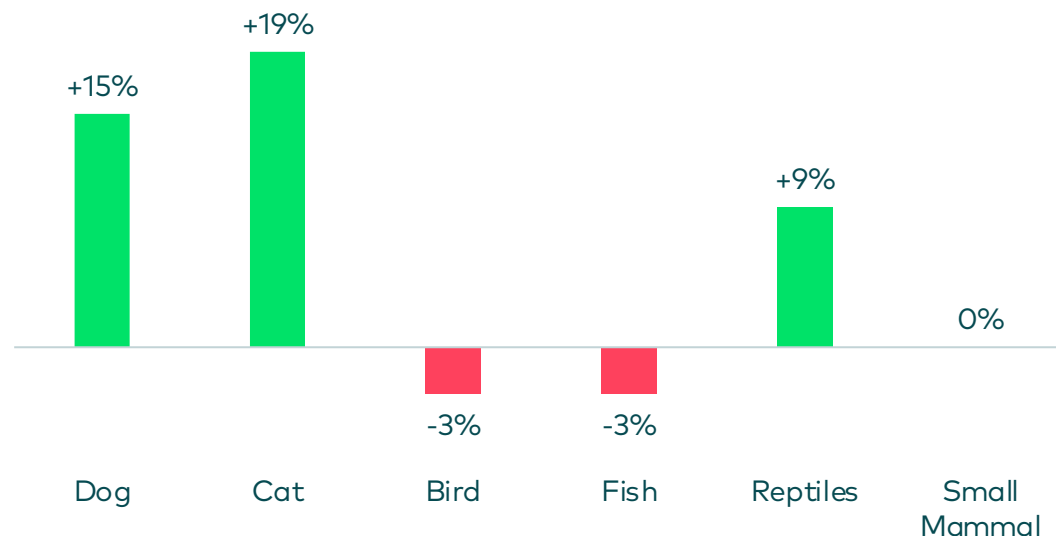
Latest 12 Months Ending 08/31/2024 vs Year Ago



Amazon has grown among dog and cat products and has been a successful channel for brands in the space even during Prime Day.

AMAZON PROJECTED SALES GROWTH BY SPECIES CATEGORY

Latest 12 Months Ending 08/31/2024 | Ranked by Category Size



Part of Amazon's Dog and Cat growth comes from Subscribe & Save deliveries for food and litter. When shoppers use **Subscribe & Save**, Amazon wins **+13% more** share of wallet.

Source: Numerator

MOST PURCHASED ITEMS PRIME DAY 2023

Based on # of units



What are shoppers buying on Amazon Prime Day 2023?

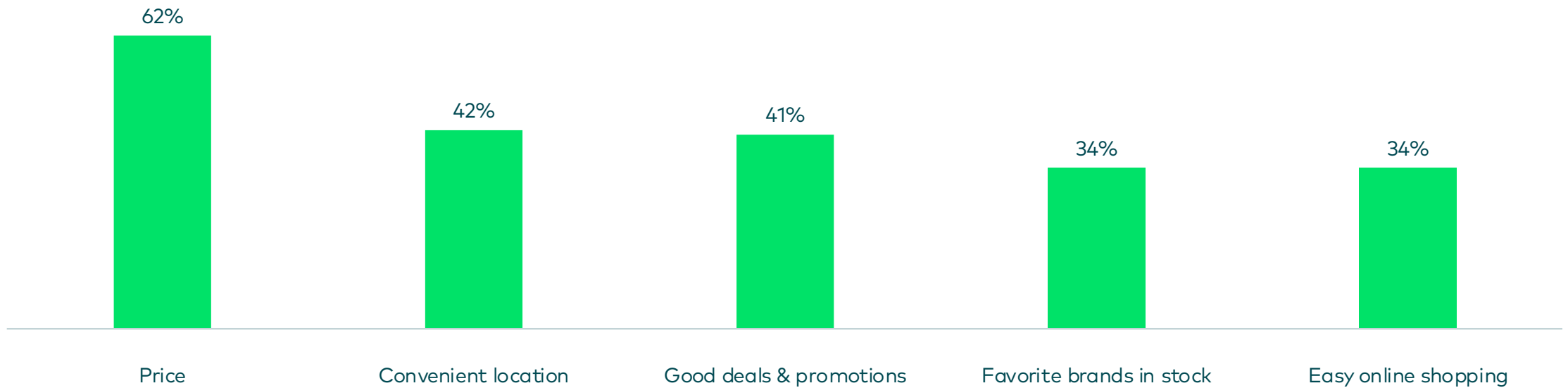
Data firm Numerator's 2023 [Live Prime Day Tracker](#) – last updated at 1 p.m. Eastern at time of publication – found some of the top categories so far this year have been home goods (purchased by 27% of shoppers), household essentials (26%) and apparel and shoes (25%). The data is based on more than 1,800 verified buyer surveys.

The top items so far, based on the number of units purchased tracked by Numerator, include:

- Temptations Cat Treats
- Amazon Fire TV Sticks
- Liquid I.V. Packets
- Apple Watch Series 8
- Melissa & Doug Toys

Price, convenience, and promotions drive retailer choice among Amazon shoppers.

TOP IMPORTANT FACTORS IN CHOOSING RETAILER FOR PET SUPPLIES % of Amazon Pet Shoppers



Assortment and trade promotions are areas of focus for pet retailers to grow.

What could a traditional pet retailer do to encourage you to shop there more?

"**Carry the items I use** for my cat or dogs. They have a lot of the big name brands that aren't actually that healthy."



"Have **better selection** and prices. It's sad, but Amazon has a much better selection."

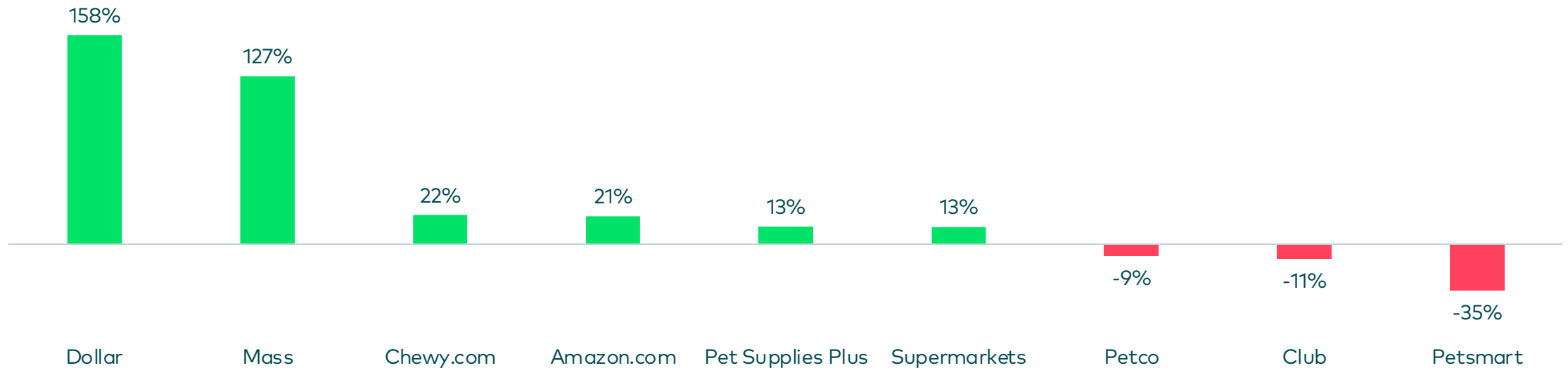
"...encourage me to shop there more by **improving their rewards programs**. I want my pet to receive a toy or treat on her birthday."

"**More promotions** in different varieties. Grooming, items bought... Savings mean a lot to people now with inflation! I also love that you can take your dog in store!"

Traditional pet stores will need to reassess promotional strategy as mass, dollar, and Amazon have taken up share of voice.

NUMBER OF AD BLOCKS CHANGE YEAR OVER YEAR

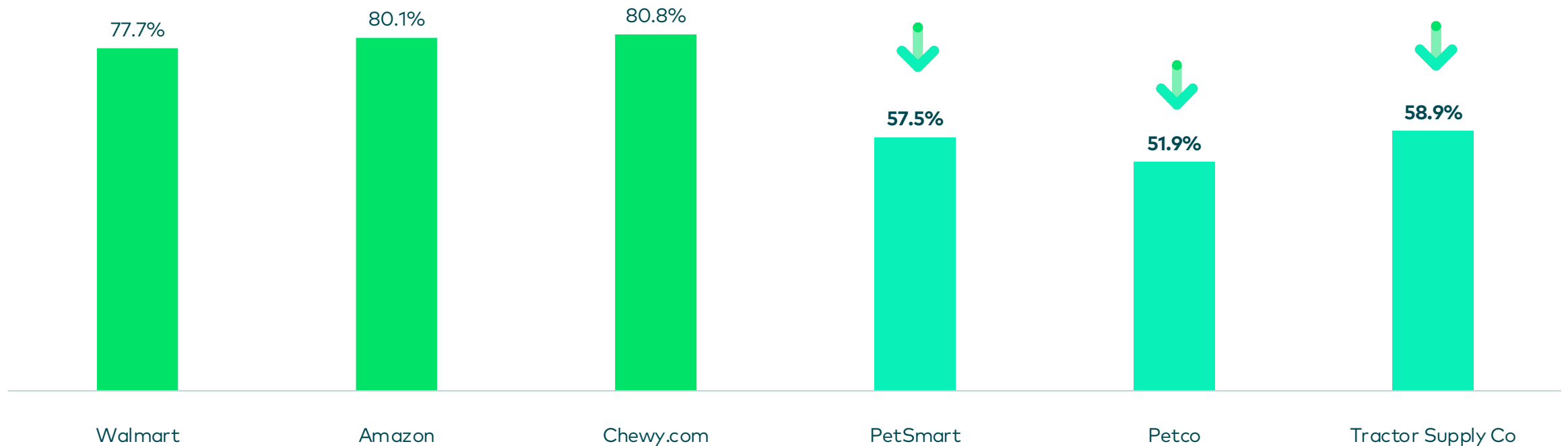
Latest 12 Months Ending 8/31/2024 | Showing Pet Banners, Amazon and Key Channels



Additionally, specialty brick & mortar retailers struggle in retaining households.

PET SECTOR REPEAT RATE ACROSS RETAILERS

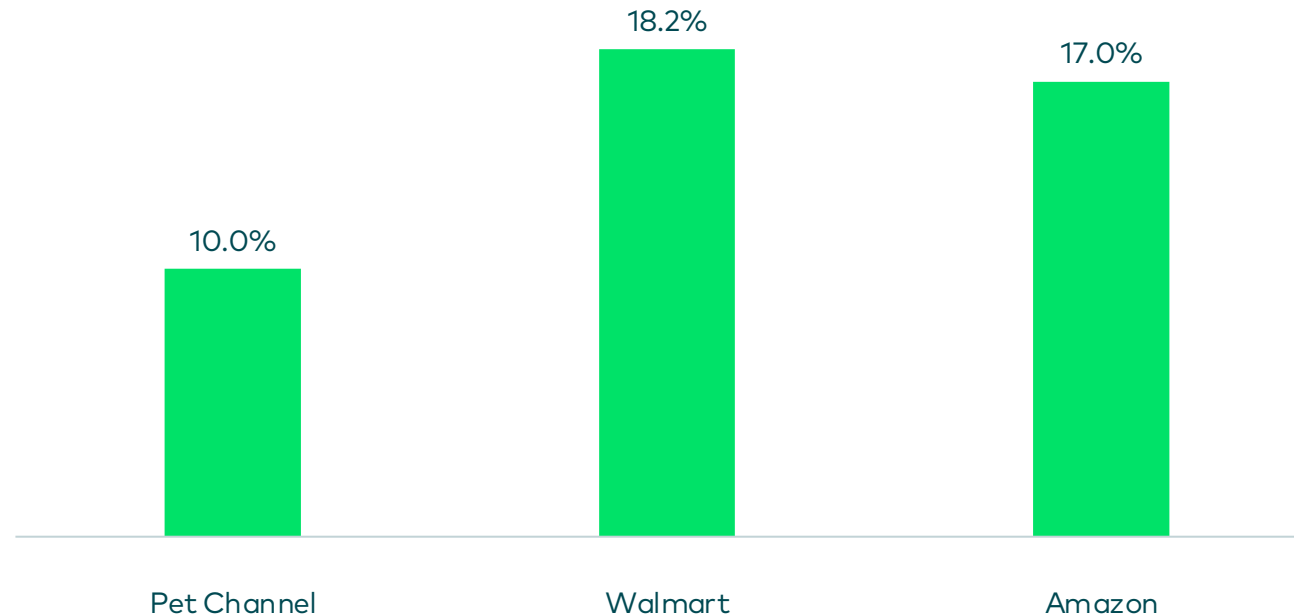
Latest 12 Months Ending 08/31/2024 vs Year Ago



Driving consecutive repeat for new pet shoppers is important as traditional pet retailers lag.

IMMEDIATE LOYALTY TO RETAILER AFTER FIRST PET SHOPPING TRIP

Latest 6 Months Ending 4/30/2024 | Post Period 26 Weeks After Analysis Period



Inspiration for Pawing Through the Aisles.



PROMOTE TO STAY AFLOAT

Traditional pet retail is facing a watershed moment as consumers are moving away from these stores and going back to Walmart and Amazon. For Walmart, we learned in our Pets & Price Tag section that private label was a growing success while Amazon shoppers seek for the lowest price and deals.

With prices at an all time high, reducing trade promotions can cause headwinds as traditional pet retailers have shown. Retailers will need to reassess what promotions they offer and determine which types of promotions drive the biggest change in driving incremental shoppers going forward.



RETAIN TO STAY ASHORE

Another threat to traditional pet retail is that new shoppers view these stores as a one-time visit instead of a repeatable destination. Walmart and Amazon are nearly two times more likely to have new shoppers visit them in their next immediate pet trip compared to the entire pet channel.

For retailers, this means breaking down who the new-to-store shopper (such as Gen Z) is and building out a nurturing campaign to drive repeat trips. For brands, it means helping these retailers out by offering brand exclusives to help stem leakage.

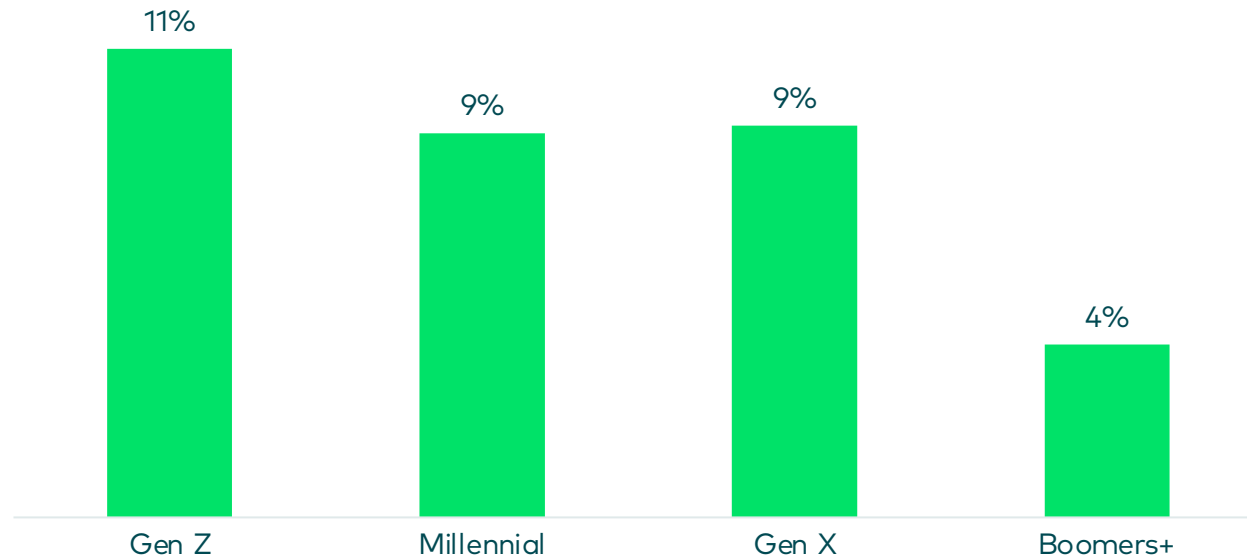


PAW POWER: PET PURCHASING TRENDS

GENERATION Z(OOMIES)

As Gen Z ages and continues to grow their spending, they will represent a larger share of total pet spending.

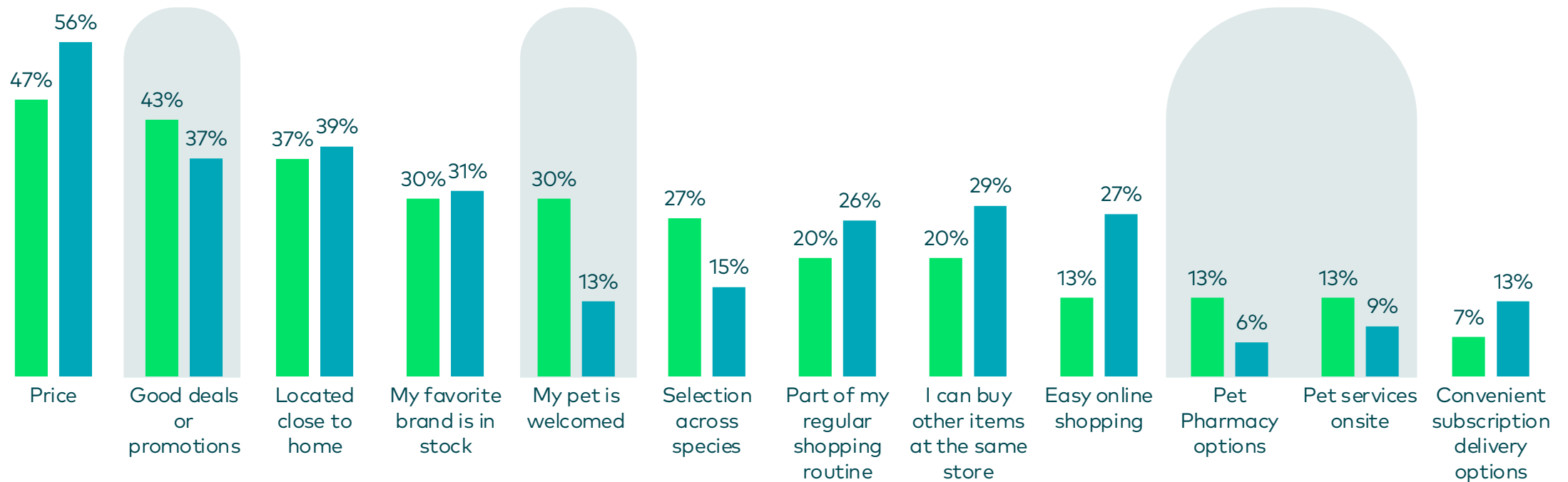
PET BUY RATE GROWTH BY GENERATION
% Change vs YA | Latest 12 Months Ending 8/31/2024



Although Gen Z seeks good deals, they heavily appreciate having the in-store experience.

FACTORS THAT ARE MOST IMPORTANT WHEN SELECTING A RETAILER TO SHOP FOR PET % of Respondents

■ Gen Z ■ All Shoppers



Source: Numerator | Survey fielded October 2024 N=1,034

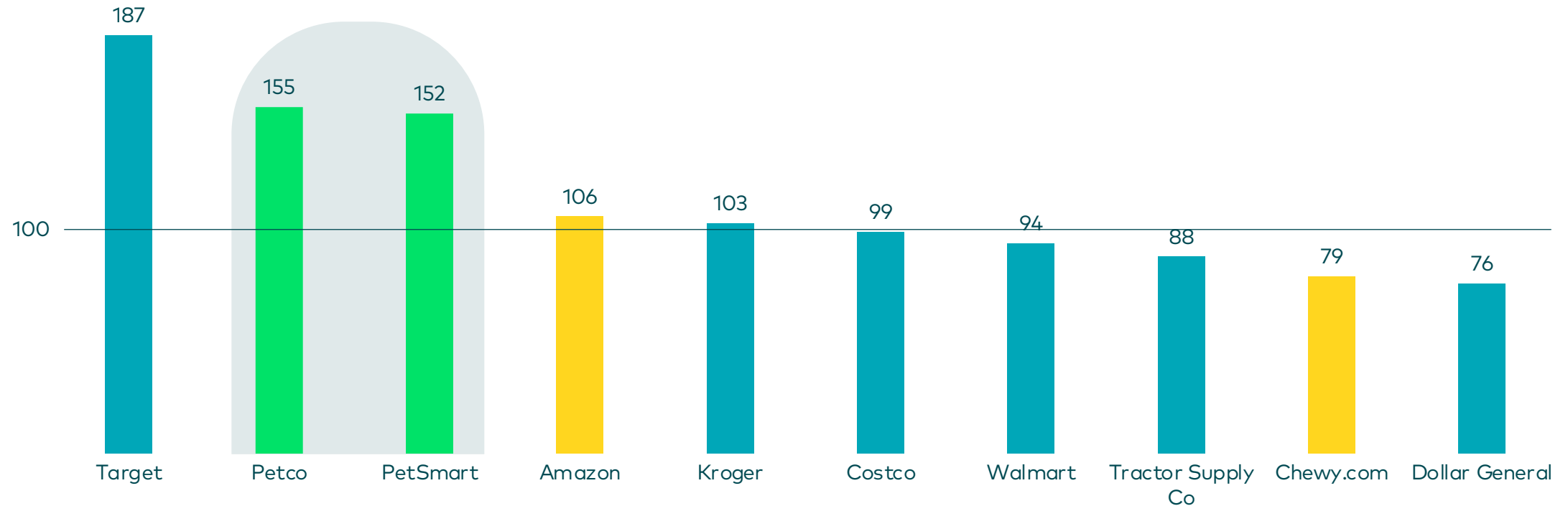
Q. Now we are going to ask you a few questions about your retailer choice for pet supplies. What factors are the most important in choosing a retailer when shopping for your pet? Select all that apply.

Having an in-store experience where pets can join in has made Gen Z more likely to shop at declining traditional pet shops.

% OF GEN Z PET SPEND INDEXED TO ALL SHOPPERS

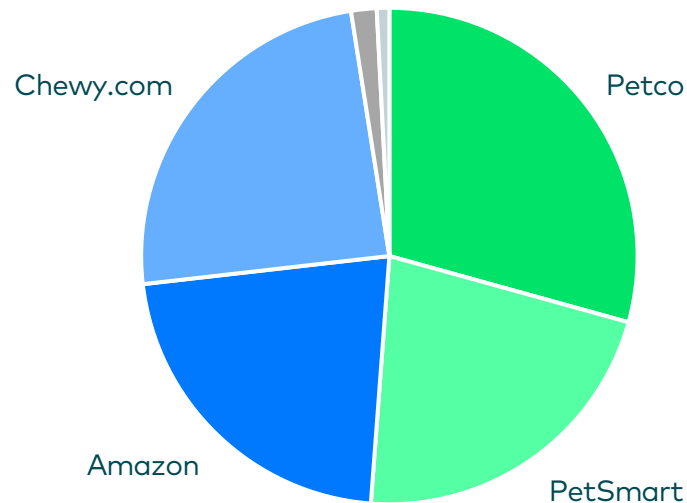
Latest 12 Months Ending 8/31/2024

■ Pet Channel ■ Online Channel ■ All Other Channel



Tiki Pets is an example of being found where Gen Z is with half of sales sourced from traditional pet retailers.

TIKIPETS % OF SPEND BY RETAILER
Latest 12 Months Ending 8/31/2024



Tiki Pets



TikiPets is a premium pet food brand offering nutritionally rich, high-quality meals for cats and dogs. Known for its real, whole-food ingredients, TikiPets provides protein-packed recipes inspired by natural diets, free from fillers and artificial additives.

Over half of TikiPet sales are found in pet shops which is where Gen Z is **57% more likely to educate themselves in for pet care**. The brand has grown by over 40% among Gen Z households (2x faster than the average brand among Gen Z).

Gen Z pet shoppers are more likely to be Hispanic, lower Income and living in urban areas.

GEN Z PET SHOPPERS

Indexed to All Pet Shoppers



Hispanic
27%, 183 Index



Cat Owner
47%, 127 Index



Low Income (<\$40k)
46%, 193 Index



Kitten (<1 year old)
18%, 134 Index



Urban
40%, 124 Index



Pet Education through Pet Store
24%, 151 Index



Cats are becoming a more likely option for Gen Z due to renting smaller multi-unit complexes.

GEN Z PET SHOPPERS

Indexed to All Pet Shoppers



Rent House/Apartment

53%, 228 Index



Cat Owner

47%, 127 Index



Live in 2-4 Unit Complex

12%, 176 Index



Dog Owner

64%, 108 Index



Brands appealing to what Gen Z's cats are experiencing is resonating with them.

TOP OVERINDEXING GEN Z PET BRANDS: SMARTYKAT CASE STUDY

Gen Z Pet Shoppers indexed to All Pet Shoppers



SmartyKat is a pet product brand dedicated to enhancing the lives of cats and their owners through innovative, eco-friendly, and affordable solutions. Their product line includes toys, scratchers, bedding, and grooming items designed to stimulate natural instincts, promote wellness, and strengthen bonds.

The brand has resonated with Gen Z pet owners well as they are **90% more likely to have their cat be diagnosed with anxiety** than the average pet owner. The brand is 29% more likely to be purchased by Gen Z pet owners vs the average pet shopper.



Inspiration for Generation Z(oomies).



LET THE CAT (AND DOG) OUT OF THE BAG

While traditional pet retailers are facing challenges, there's a bright spot: Gen Z. This generation places a noticeably higher value on the in-store experience compared to other age groups, largely because they want their pets to join them in the shopping experience. This preference is reflected in their spending, with Gen Z's purchases at traditional pet stores significantly overindexed.

Brands looking to win with this cohort should focus on proving to traditional pet retailers that their products align with the values and needs of Gen Z shoppers. This can be achieved by addressing the specific categories they prioritize or catering to the pet-related concerns that matter most to them. Meanwhile, non-traditional pet retailers should explore ways to replicate the in-store experience that appeals to Gen Z, such as creating pet-friendly store sections or hosting events designed for pet owners and their companions.



MAKE PEACE WITH THE CAT VS DOG WARS

Gen Z is also redefining pet ownership trends. While dogs remain the most common pet in their households, this generation is far more likely to own cats than previous ones, largely due to their current living conditions, which often involve smaller spaces or urban environments.

As Gen Z matures and gains more purchasing power, brands will need to track whether increased income or homeownership leads to a shift toward dog ownership. In the meantime, there is a clear opportunity to innovate within the cat category and tap into this growing segment, riding the momentum of Gen Z's evolving preferences.

How Numerator helps pet brands and retailers grow.



OMNICHANNEL VISIBILITY

The share for pet products has shifted heavily to online in the past four years reaching nearly the same amount of share as in-store mass and pet retail combined.

Pet retail is also facing a challenge as they struggle to keep up against inflationary pressures. For brands and retailers to find growth, they need the coverage for it first.

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GEN Z VISIBILITY

Amid challenges for traditional pet retailers, Gen Z offers a growth opportunity. To be able to capture them, brands and retailers must understand their purchasing and sentiment behaviors.

Numerator offers in-depth visibility among Gen Z pet owners where brands can get purchase-verified survey responses and insight into what products they prefer.

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IN-DEPTH CONSUMER INSIGHT

Understanding pet owners is essential for driving growth. Numerator's Premium People Groups provides detailed insights into key segments, from "Doggo-graphics" like dog size and age to "Catto-graphics" such as indoor/outdoor status. Track performance across shopper profiles, household affinities, and basket trends to identify gaps in brand messaging and monitor competitor performance.

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