## America's Pet Owners - US - August 2019

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.


This report looks at the following areas:

The pet market is made up of four segments: pet food, pet supplies, pet services and veterinary services. Together, these market segments are estimated to reach $\$ 96.4$ billion in 2019. Growth in the pet market has been strong in the past five years ( $5 \%+$ annually) but is anticipated to decelerate slightly over the next five years. Even so, above-average growth is projected; a $28 \%$ increase is expected between 2019 and 2024.
"Americans are looking at the products and services made for them and asking: "why don't they have this for my pet?" From fresh food delivery to anti-anxiety offerings, products for pets are looking more like products for people every day. This is one of the major factors driving this market forward to an estimated $\$ 96.4$ billion in 2019."

- Dana Macke, Associate Director - Lifestyles \&

Leisure

## BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL:
EMEA
+44(0)2076064533

Brazil 08000959094

Americas
$+1(312) 9435250$

China
$+86(21) 60327300$

APAC
$+61(0) 282848100$
EMAIL: reports@mintel.com

## America's Pet Owners - US - August 2019

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

## Overview

What you need to know
Definitions

## Executive Summary

## Market overview

Figure 1: Total US sales and fan chart forecast of pet care products and services, at current prices, 2014-24

## Redefining Adulthood

The trend
The implication
Figure 2: Attitudes toward pet ownership - Pets understand owners, April 2019
Creature Comfort
The trend
The implication
Figure 3: Usage and interest - Out-of-home pet services, April 2019
Total Wellbeing
The trend
The implication
Figure 4: Pet health concerns, April 2019
Social Isolation
The trend
The implication
Figure 5: Attitudes toward pet ownership - Communicating with pets, April 2019
What it means

## The Market - What You Need to Know

Pet market grew nearly 6\% from 2018
Pet ownership remains stable
Owners treat pets more like people

## Market Size and Forecast

Pet market nearing $\$ 100$ billion
Figure 6: Total US sales and fan chart forecast of pet care products and services, at current prices, 2014-24
Figure 7: Total US sales and forecast of pet care products and services, at current prices, 2014-24

## Market Breakdown

Pet segments remain stable
Pet and vet services
Pet supplies
Pet food

## America's Pet Owners - US - August 2019

Report Price: $£ 3254.83|\$ 4395.00| € 3662.99$

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 8: Pet segments as share of total market, at current prices, 2014-19

## Market Factors

Pet ownership remains stable post-recession
Figure 9: Share of US households with pets, 2010-18
Fur babies are a first step for Millennial families
Figure 10: Median age at first marriage, by gender, 2008-18
Young adults enter the housing market
Figure 11: Primary residence type, March 2019
Housing priorities shift
Figure 12: Median lot size and median house size of new single-family houses sold excluding condominiums, 2009-17

## Market Perspective - Humans First, Pets Next

Pet food good enough to eat
Fresh
Snacks
Customization
The eco-friendly pet
Reducing plastic waste
Pets let their hair down
Fit owners, fit pets
Pet gear
Partner workouts
Specialized classes

## Key Trends - What You Need to Know

Pets express their own personal style
GPS trackers help us watch our watchdogs
Popular pets set trends online
Pets lighten the mood for traditional brands
Planning for a pet's life and death
Owners want to travel with pets, but not stress
Meat-free and loving it

## What's Happening Now

Pets accessorized to match owner's aesthetic
Who's doing this well
Figure 13: Wild One walk kit, June 2019
Figure 14: The Foggy Dog Instagram post, June 2019
TV and toys keep pets entertained

## Who's doing this well

Figure 15: iFetch Frenzy Interactive Brain Game

## America's Pet Owners - US - August 2019

Report Price: $£ 3254.83|\$ 4395.00| € 3662.99$

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Pet holidays give a reason to tweet and treat
Figure 16: Popularity of the search term "Puppy," June 2018-June 2019
Who's doing this well
Figure 17: National Puppy Day Twitter posts - Military organizations, March 2019
Figure 18: National Puppy Day Twitter posts - Sports organizations, March 2019
Celeb pets steal the show
Who's doing this well?
Figure 19: Taylor Swift - ME! (feat. Brendon Urie of Panic! At The Disco)
Figure 20: Kim Kardashian West Instagram post for The Secret Life of Pets 2, May 2019
Brands create "relatability" with pets in advertising
Who's doing this well?
Figure 21: Lulu \& Lobo vs. the Woo Woo Monster, April 2019
Figure 22: Dog toys piling up? Track recurring payments with Control Tower(SM), March 2019
Figure 23: Introducing the new Propel $®$ Card - Movie Night|Popular Streaming Services, January 2019
Tracking pets' activity and location
Who's doing this well?

## What's Happening Next

Planning for pets' lives and deaths
Emerging opportunity: financial planning for pets
Figure 24: Nationwide veterinary pet insurance, mobile ad, June 2017
Pets need self-care too
Emerging opportunity: CBD pet products
Nipping at the plant-based market
Emerging opportunity: vegan pet food
Living their best (nine) lives
Figure 25: REI adventures for pets (April Fool's campaign), April 2019
Emerging opportunity: help owners bring their pets along
Figure 26: Smart Pet Love Snuggle Puppy, June 2019
Pets are just dirty enough
Emerging opportunity: messaging around the pet mess
Cuddle without the chaos
Emerging opportunity: part-time pets
Figure 27: CoPuppy | Pet Sharing, October 2018

## The Consumer - What You Need to Know

Pets remain a part of most peoples' lives
Breed matters more for dog owners
Growing service market driven by dogs
Pet owners want to take their pets along
Medical professionals have the most sway

VISIT: store.mintel.com
CALL: EMEA +44 (0) 2076064533 | Brazil 08000959094
Americas +1 (312) 9435250 | China +86 (21) 60327300
APAC +61 (0) 282848100 |
EMATL: reports@mintel.com

## America's Pet Owners - US - August 2019

Report Price: $£ 3254.83$ | $\$ 4395.00 \mid € 3662.99$
The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Mental and emotional health are a priority
Pets are part of the family
Pet owner segmentation shows key opportunities

## Pets and Their People

The majority of Americans have a pet in the household
Figure 28: Pet ownership - Type of pet and number of pets, April 2019
Pet owner profiles
Little distinction between pet owner profiles
Figure 29: Pet owner demographics, April 2019
Pet characteristics: dogs
Owners want small dogs, but not too small
Figure 30: Pet ownership - Size of dog, April 2019
The puppy phase is critical, but short
Figure 31: Pet ownership - Age of dog, April 2019
Pet characteristics: cats
The adult stage is extended for cats
Figure 32: Pet ownership - Age of cat, April 2019
Pet characteristics: other pets
Figure 33: Pet ownership - Other pets word cloud, April 2019

## Pet Acquisition

Dogs are primarily "rescued"
Figure 34: Pet acquisition - Dogs, April 2019
Pet stores and breeders have less play for cats
Figure 35: Pet acquisition - Cats, April 2019

## Pet Services

Out-of-home services
Opportunity areas: day care and pet training
Figure 36: Usage and interest - Out-of-home pet services, April 2019
In-home services
Opportunity area: video monitors
Figure 37: Usage and interest - In-home pet services, April 2019
Emerging services
Opportunity area: subscription services
Figure 38: Welcome, Pet Owners - Amazon commercial, April 2019
Figure 39: Usage and interest - Emerging pet services, April 2019
Opportunities for cat owners: subscriptions and pet sitting
Figure 40: Usage and interest - Pet services, by cat owners only and dog owners only, April 2019

```
How Pets Influence Owners
```

BUY THIS
REPORT NOW

## America's Pet Owners - US - August 2019

Report Price: $£ 3254.83|\$ 4395.00| € 3662.99$

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Owners are tracking their own activity, not their pets'

Figure 41: Whistle 3 setup and specs, June 2019
Figure 42: Pet owner activities and preferences, April 2019
Pets in public
Figure 43: Pet owner activities - Bringing pets in public, April 2019
Have pet, will travel
Figure 44: Pet owner activities and preferences - Traveling with pets, April 2019
Cats may have emotional benefits, but dogs motivate physical activity
Figure 45: Pet owner activities and preferences, by cat only and dog only owners, April 2019
Young adults bring pets along
Figure 46: Pet owner activities and preferences - Pets in public, by age, April 2019

## How Pet Owners Stay Informed

Vets play crucial role in guiding owners
Figure 47: Sources of pet information - Pet professionals, by age of pet, April 2019

## Entertainment is an avenue to pursue

Figure 48: Jiffpom merchandise at Walmart, February 2019
Figure 49: Sources of pet information, April 2019
Dogs take the internet back from cats
Figure 50: Why Does Grumpy Cat Hate The Holidays? November 2018
Figure 51: Sources of pet information, by type of animal owned, April 2019

## Pet Health Concerns

Wholly healthy pets, Batman!
Figure 52: Pet product examples - Healthy weight, June 2019
Figure 53: Pet product examples - Other health benefits, June 2019
Figure 54: Pet health concerns, April 2019
Anxiety can impact pets of all ages
Figure 55: Pet health concerns - Select items, by age of pet, April 2019
Owner anxiety might manifest as a pet concern
Figure 56: Pet health concerns - Select items, by age of owner, April 2019
Cat can't hide those extra pounds
Figure 57: Pet health concerns, by type of pet, April 2019

## Attitudes toward Pet Ownership

Pet benefits go beyond the functional
Figure 58: Attitudes toward pet ownership - The pet/owner bond, April 2019
Also, dude, "pet owner" is not the preferred nomenclature
Figure 59: Attitudes toward pet ownership - Pet acquisition and experience, April 2019
Concerns of loneliness may prompt people to adopt a pet for their pet
Figure 60: Attitudes toward pet ownership - Pet worries, April 2019

## America's Pet Owners - US - August 2019

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## How people and pets communicate

Figure 61: Attitudes toward pet ownership - Communicating with pets, April 2019
Bond may be strong for cat owners, but cattitudes differ
Figure 62: Attitudes toward pet ownership - Select items, by cat and dog owners, April 2019

## In Their Words - Pet Personalities

Pet Enneagram types
In their dreams
Pet obsessions
Pet Owner Segmentation

## Factors

Figure 63: Pet owner segments, April 2019
Rescues (35\%)
Characteristics
Demographics
Opportunity
Figure 64: Demographic profile: Rescues segment, April 2019
Show Dogs (24\%)
Characteristics
Demographics
Opportunity
Figure 65: Demographic profile: Show Dogs segment, April 2019
Lap Dogs (21\%)
Characteristics
Demographics
Opportunity
Figure 66: Demographic profile: Lap Dogs segment, April 2019
Free Range (20\%)
Characteristics
Demographics
Opportunity
Figure 67: Demographic profile: Free Range segment, April 2019
Figure 68: Interest in pet services, by pet owner segments, April 2019

## Appendix - Data Sources and Abbreviations

Data sources
Fan chart forecast
Consumer survey data
Consumer qualitative research
Direct marketing creative

## America's Pet Owners - US - August 2019

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Abbreviations and terms

## Abbreviations

## Terms

## Appendix - The Market

Figure 69: Total US sales and forecast of pet care products and services, at current prices, 2014-24
Figure 70: Total US sales and forecast of pet care products and services, at inflation-adjusted prices, 2014-24
Figure 71: Total US sales and forecast of veterinary services, at current prices, 2014-24
Figure 72: Total US sales and forecast of veterinary services, at inflation adjusted prices, 2014-24
Figure 73: Total US sales and forecast of pet services, at current prices, 2014-24
Figure 74: Total US sales and forecast of pet services, at current prices, 2014-24

## Appendix - The Consumer

Figure 75: Share of households with pets, 2010-18
Figure 76: Median age at first marriage, by gender, 2008-18
Figure 77: Median lot size and median house size, 2009-17

