INNOVATING TO IMPACT

dentsu

US EDITION

THE EVOLVING LANDSCAPE OF PET OWNERSHIP IN THE U.S.

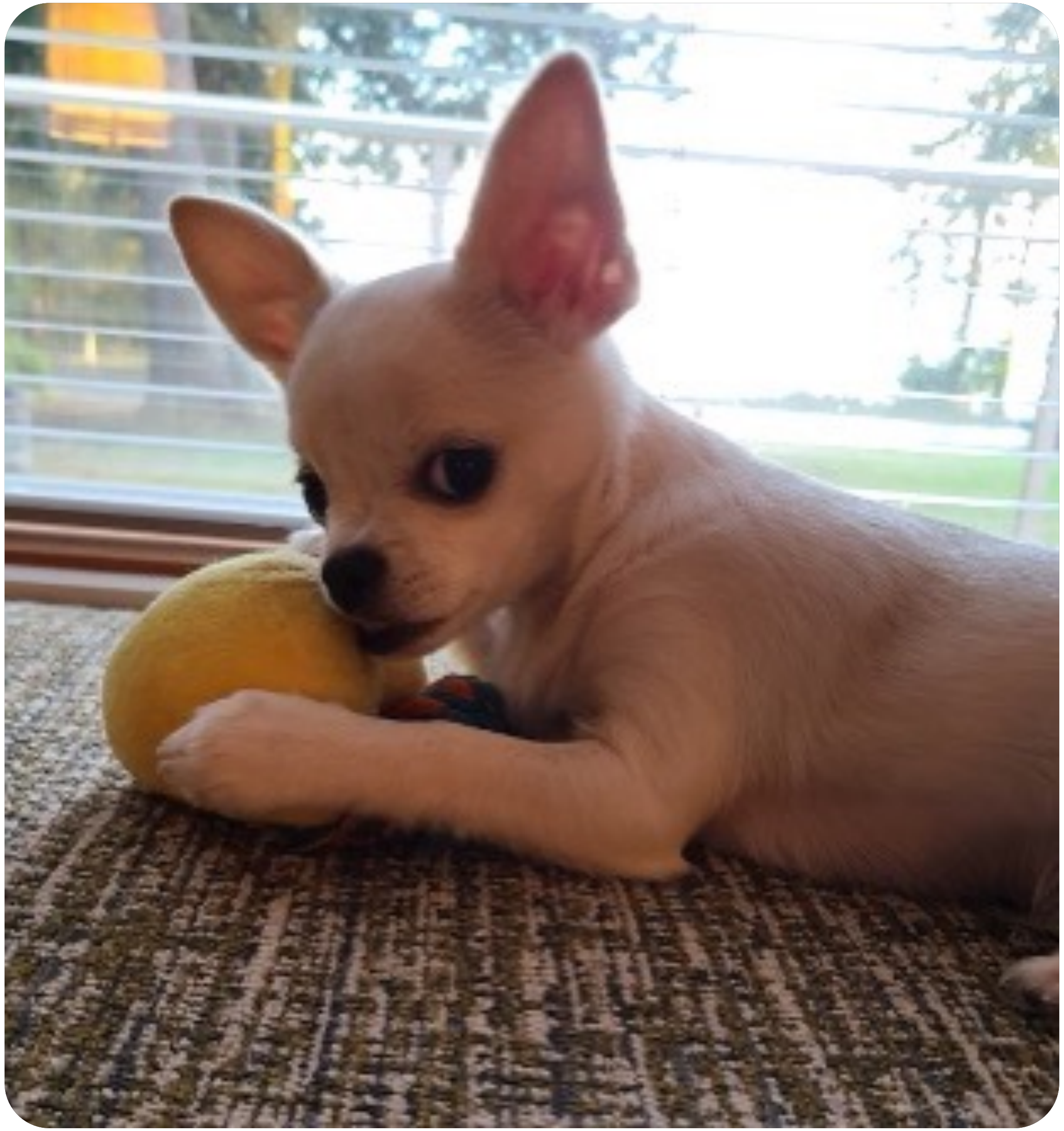
OCTOBER 2025

PART OF THE DENTSU CONSUMER NAVIGATOR SERIES

ABOUT THIS STUDY

Survey Methodology

- The survey was conducted by dentsu via Toluna, an online research panel.
- Administered on October 21st, 2025.
- Distributed among a nationally representative sample of 1,000 U.S. respondents.
- How we defined "pet" in the survey: *an animal that lives with you for companionship, emotional support, or enjoyment – not a utility, like animals you keep as livestock, farming, etc.*



AGENDA

CONTENTS

TOP CONSUMER INSIGHTS

PET OWNERSHIP IS AMERICA'S NEW DEFAULT

Three in four Americans either live with pets or plan to. Even non-owners aren't rejecting the idea — they're simply waiting for the right financial or living conditions. Owning a pet isn't an exception; it's an *aspiration* built into the modern American life plan.

PETS HAVE GRADUATED FROM COMPANIONS TO FAMILY

Across all demographics, pets are family — full stop. For many, they're adopted to *complete* the household, not to fill it. Pets are now co-parents, comforters, and emotional anchors that shape how families define love, care, and belonging.

PETS INCREASINGLY SHAPE HOW AMERICANS LIVE, WORK, AND SPEND

From the cities they choose to the vacations they take, pets are influencing every major lifestyle decision. They reshape work hours, travel plans, and even home design. "Pet-friendly" is no longer a perk — it's a prerequisite.

THE BIGGEST UNTAPPED ADJACENCY FOR CONSUMER BRANDS ISN'T PEOPLE – IT'S PETS

Pet owners — especially younger and higher-income consumers — want non-pet brands to design for their animals too. From apparel and wellness to hospitality and tech, any brand that ignores the "four-legged economy" risks leaving money (and loyalty) on the table.

PETS MAKE ADS WORK HARDER

Four in ten Americans say pets instantly add warmth and relatability to advertising; a third follow pet influencers for joy, comfort, and entertainment. In an age of emotional fatigue, pets are marketing's most trusted ambassadors of authenticity.

AMERICANS ARE READY FOR A TECH-ENABLED PET FUTURE

Pet owners already use connected devices and content to care for their pets — and they're open to more. From AI tracking to virtual companionship, consumers trust pet-specialty brands over Big Tech to build the future of animal care — and affection.

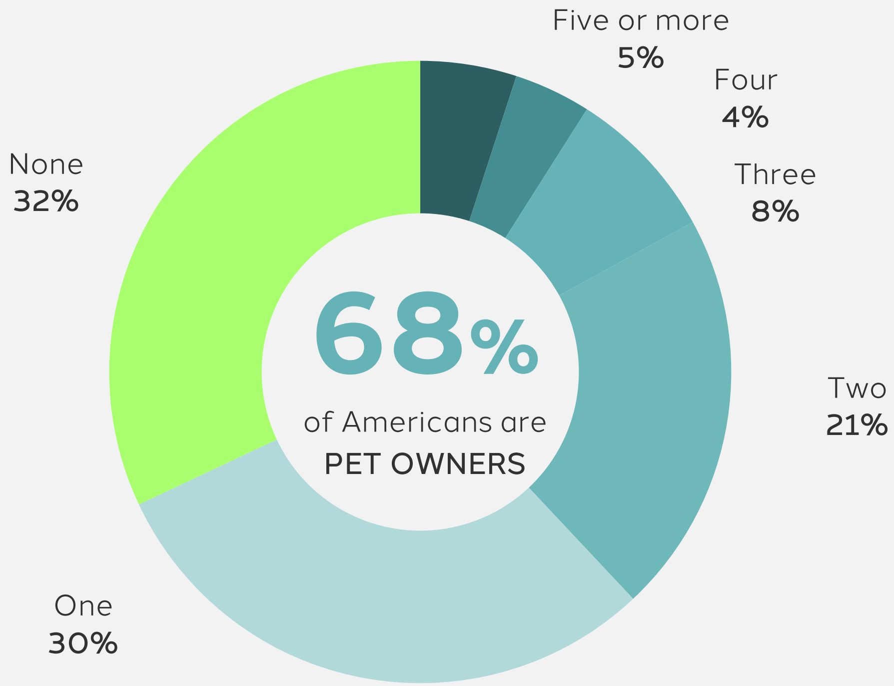
SECTION 02

EXPLORING THE UNITED PET OWNERS OF AMERICA

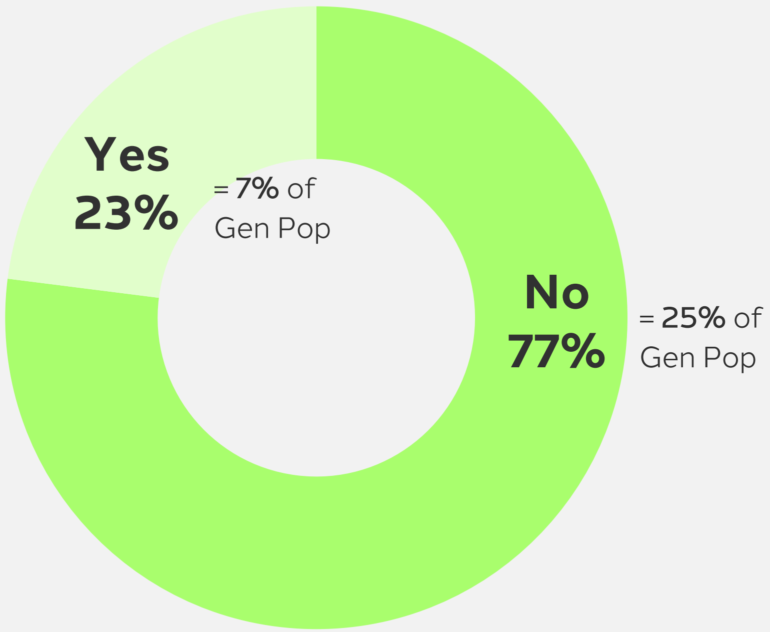
PET HOUSEHOLDS ARE THE NORM IN THE UNITED STATES.

Americans are pet-obsessed: 3 in 4 adult consumers either live in a household with pets or would like to get pets.

IF AND HOW MANY PETS LIVE IN YOUR HOUSEHOLD?

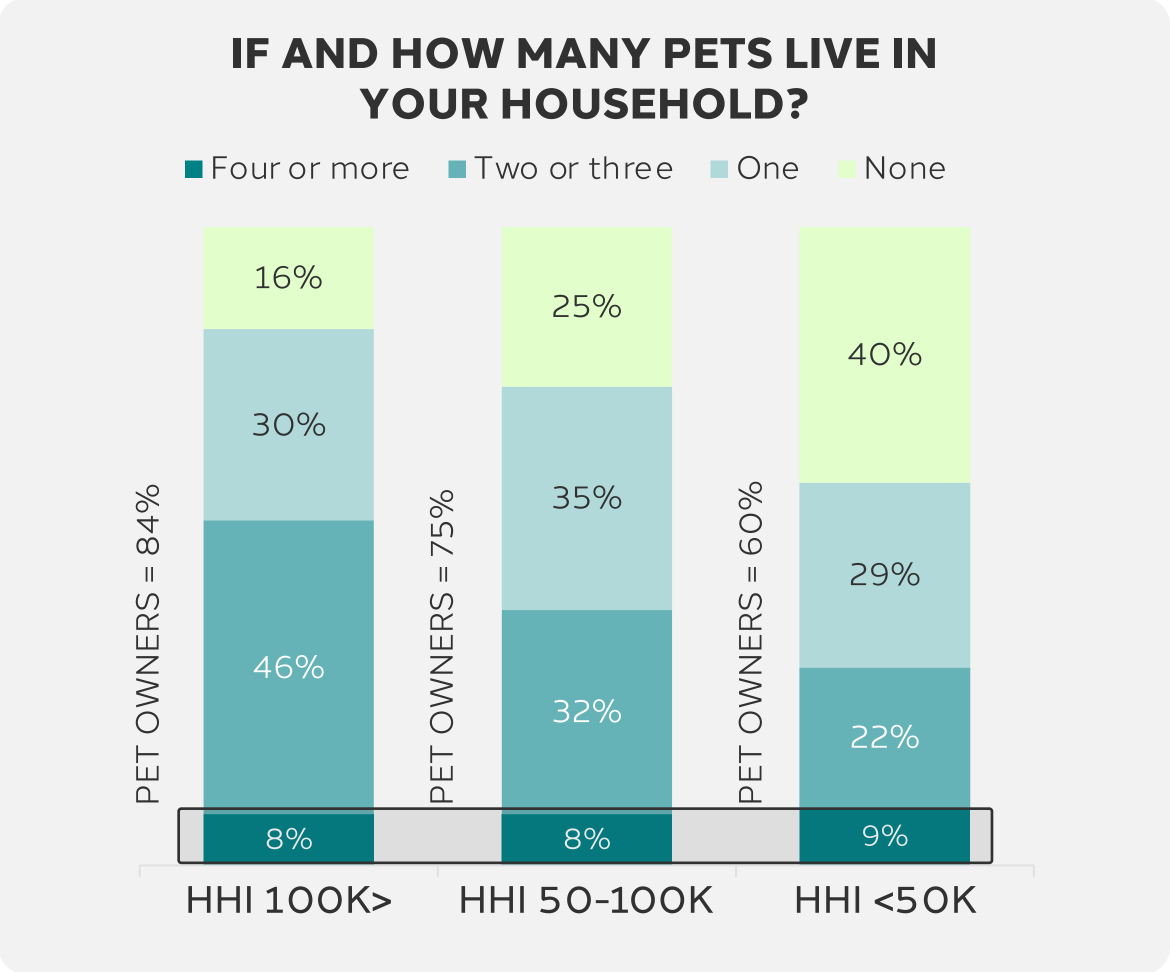


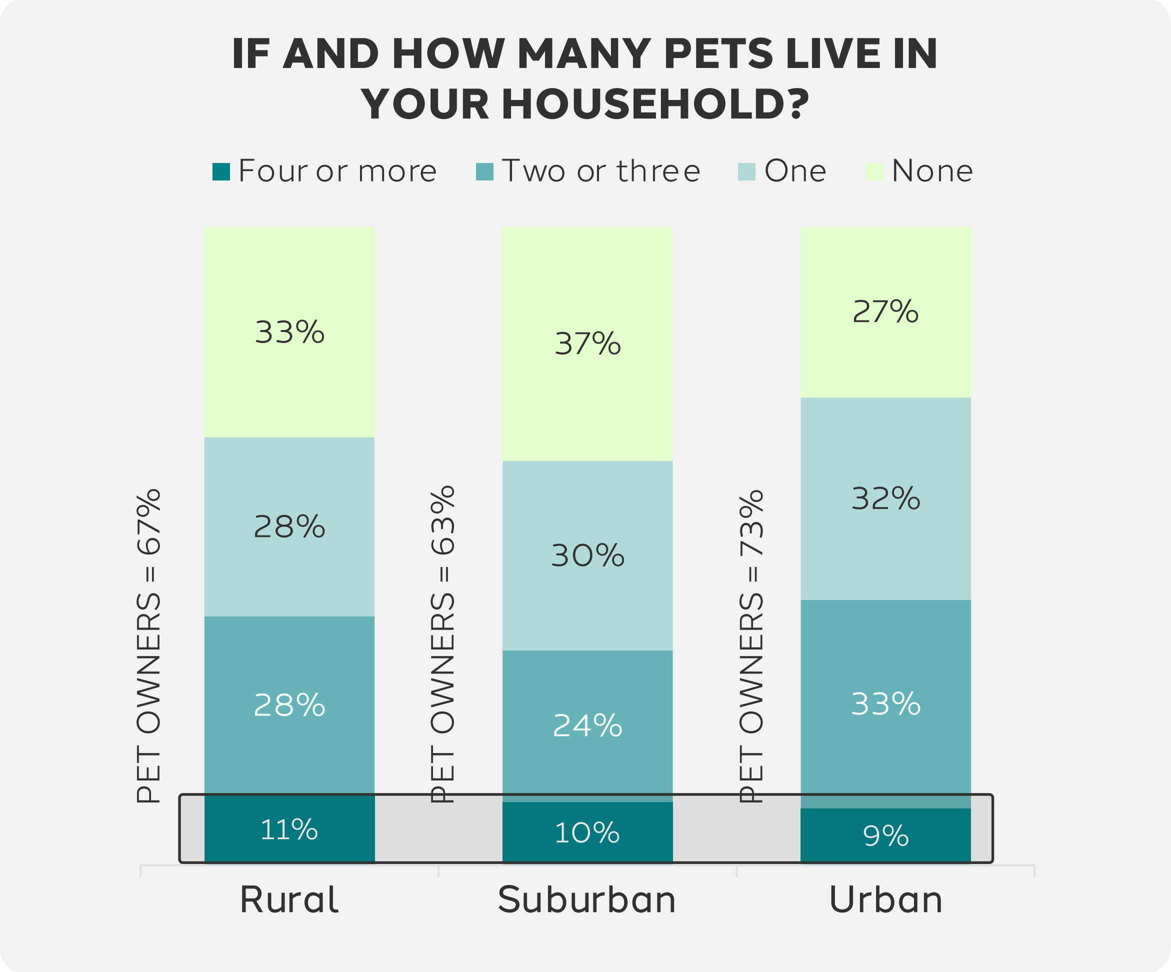
YOU SAID THERE ARE NO PETS IN YOUR HOUSEHOLD. ARE YOU PLANNING TO GET PETS IN THE FUTURE?



GREATER FINANCIAL MEANS AND LIVING IN URBAN AREAS ENCOURAGE PET OWNERSHIP

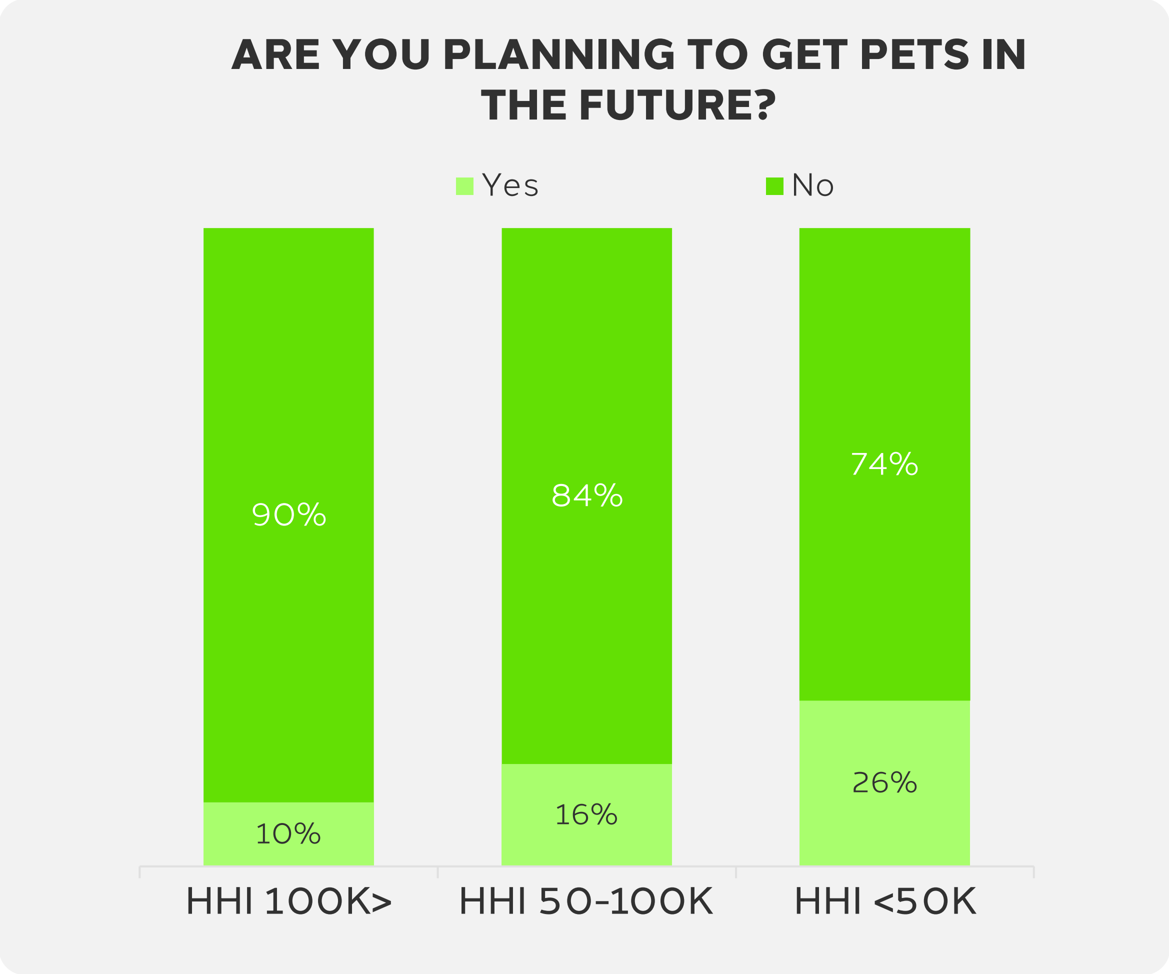
With that being said, pet “fanaticism” (owning more than 4 pets) transcends both income and the community in which consumers live.

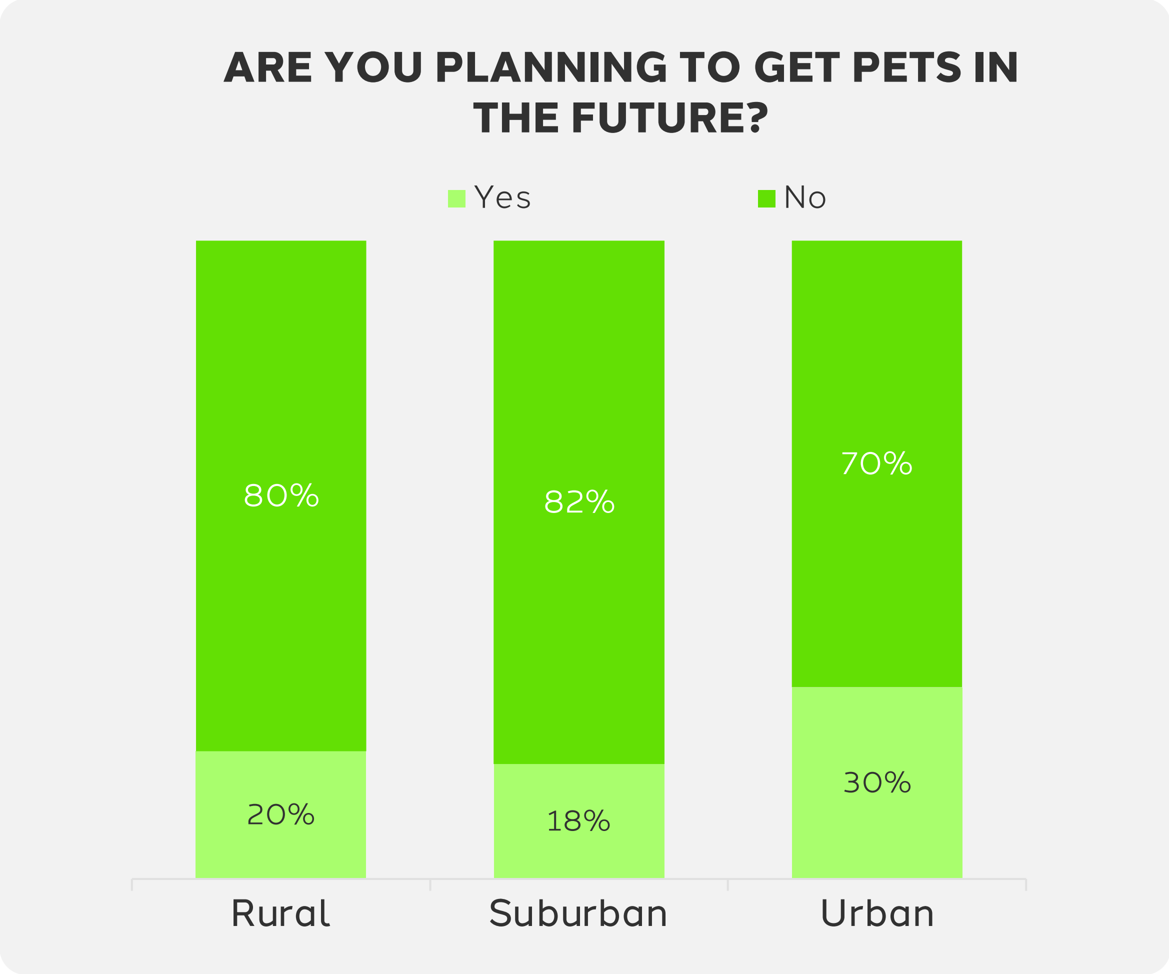




PET OWNERSHIP IN THE U.S. WOULD BE EVEN MORE WIDESPREAD, WERE IT NOT FOR PRACTICAL LIMITATIONS

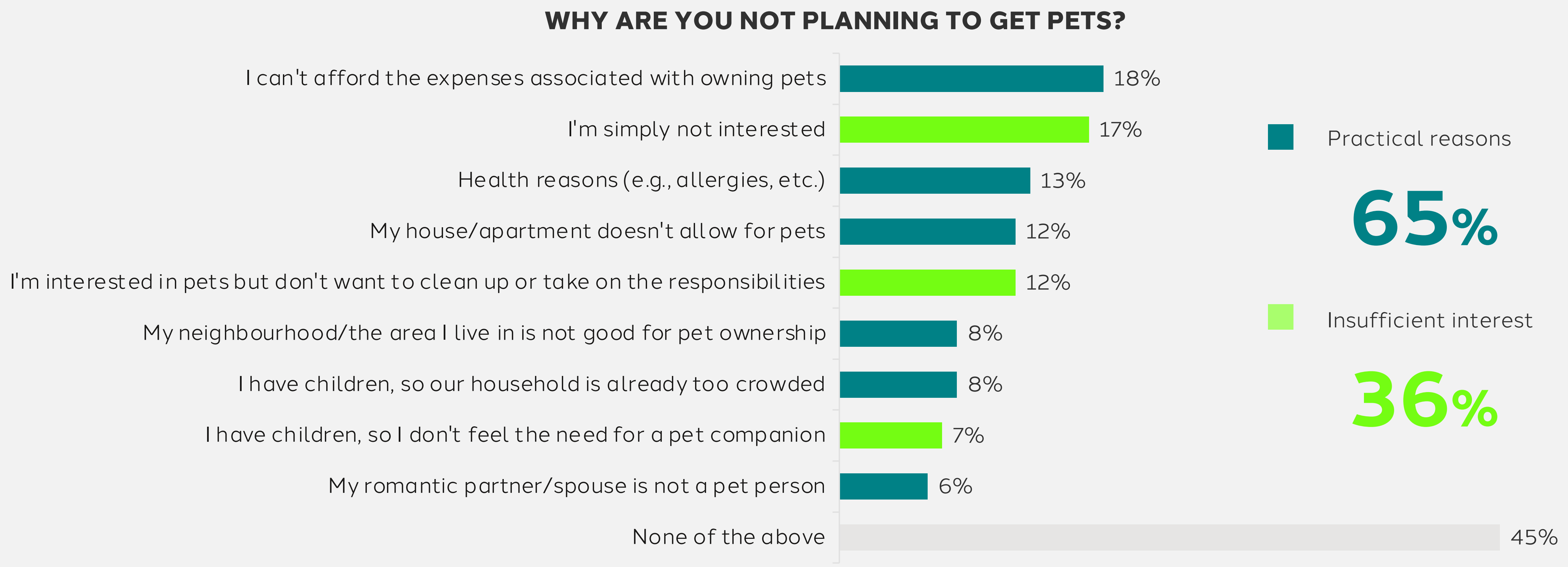
Lower-income consumers and those who live in urban areas are more likely to want to get pets in the future.





THUS, IT'S NOT SURPRISING THAT AFFORDABILITY IS CITED AS THE MAIN DETERRENT BY THOSE WHO ARE NOT PLANNING TO GET PETS.

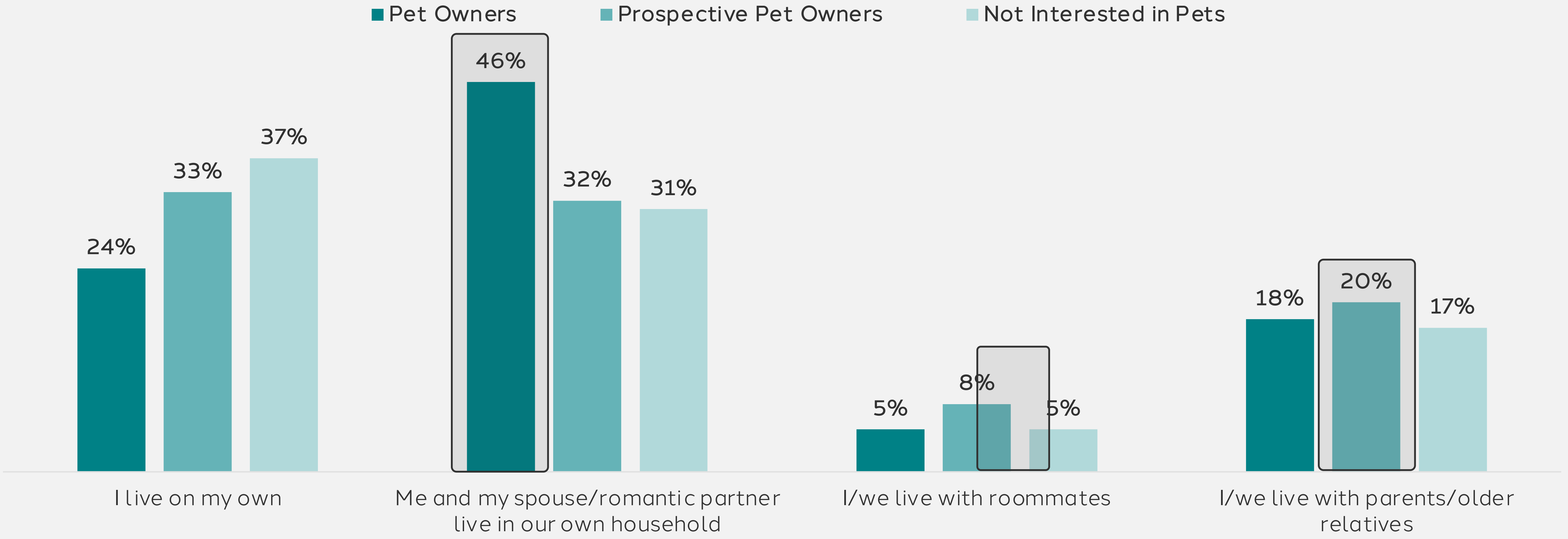
Overall, it's practical reasons (more so than lack of interest) that stands in the way of pet companionship.



PET OWNERSHIP IS OFTEN DEFERRED TO WHEN ROOTS ARE PUT DOWN WITH A PARTNER

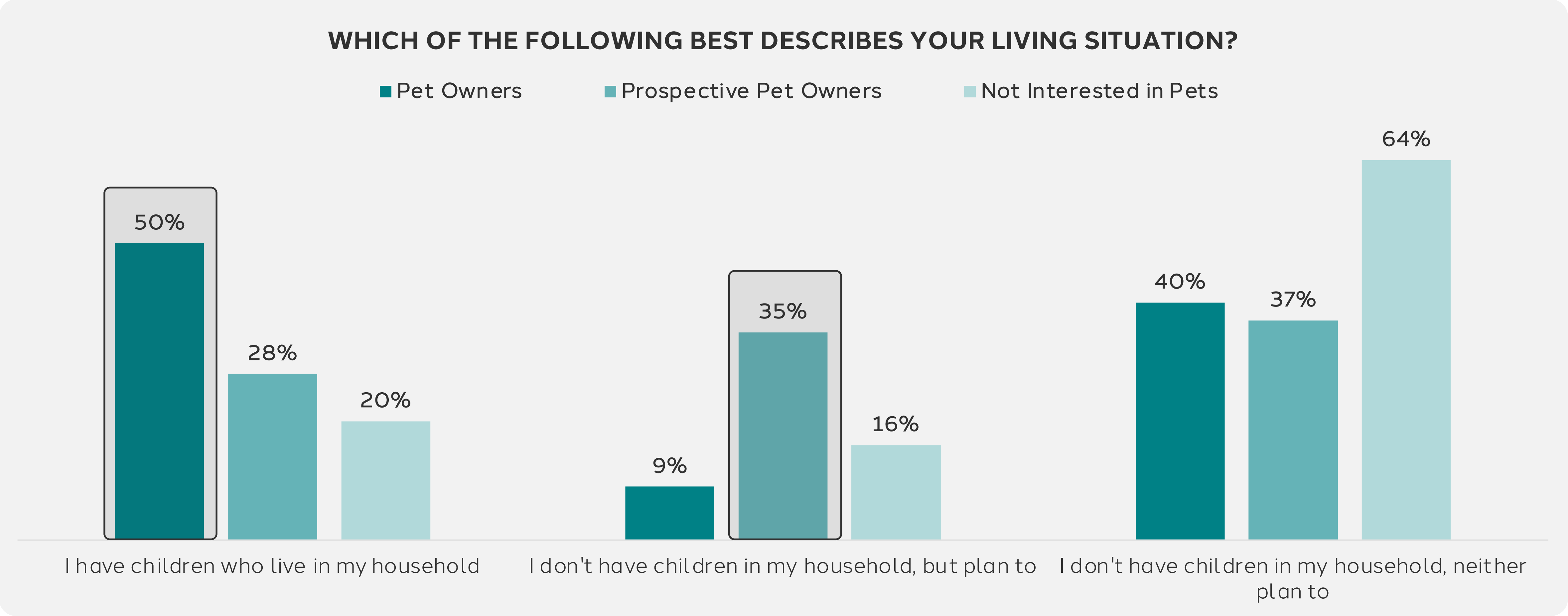
Pet Owners are most likely living with a spouse or romantic partner in their own household. Conversely, Prospective Pet Owners are more likely to live with roommates or older relatives, indicating that ownership will likely kick in once their living situation evolves.

WHICH OF THE FOLLOWING BEST DESCRIBES YOUR LIVING SITUATION?



LIKEWISE, PETS OFTEN ROUND OUT A HOUSEHOLD THAT ALSO INCLUDES CHILDREN

Pet Owners are most likely to live in a household with children, while Prospective Pet Owners are also significantly more likely to be planning to have children, compared to others.



DIVING DEEP INTO AMERICAN PET OWNER PERSONAS

There is some truth in the 'cat lady' stereotype. With that being said, Gen Zers also over-index on being Pet Fanatics. There is no linear correlation between household income and the number of pets. Lower-income pet owners are more likely to have 4+ pets but might do so instead of having children. Higher-income pet owners usually settle for 2-3 pets 'rounding out' a household that also includes children.

PET FANATICS 9%

4+ PETS HOUSEHOLD

Women (110i);
Gen X (122i), Gen Z (110i);
HHI <50k (110i)
Rural (122i)
Don't live w/ children and don't plan to (111i)

MULTIPLE PET OWNERS 29%

2 or 3 PETS HOUSEHOLD

Men (104i);
Millennials (131i)
HHI 100k> (159i)
Urban (114i)
Live with children (134i)

SINGLE PET OWNERS 30%

1 PET HOUSEHOLD

Men (107i);
Millennials & Gen X (107i)
HHI 50-100k (117i)
Urban (107i)
Live with children (117i)

IMPLICATIONS FOR MARKETERS

TURN PET OWNERSHIP INTO A LIFE-STAGE MARKER

Pet adoption often coincides with other defining transitions—moving in with a partner, getting married, or starting a family. For many, bringing home a pet feels like "completing" the household. Brands that show up at this emotional inflection point can earn disproportionate affinity. Treat "getting a pet" as a modern milestone—on par with marriage, parenting, or buying a first home.

REMOVE PRACTICAL BARRIERS, NOT EMOTIONAL ONES

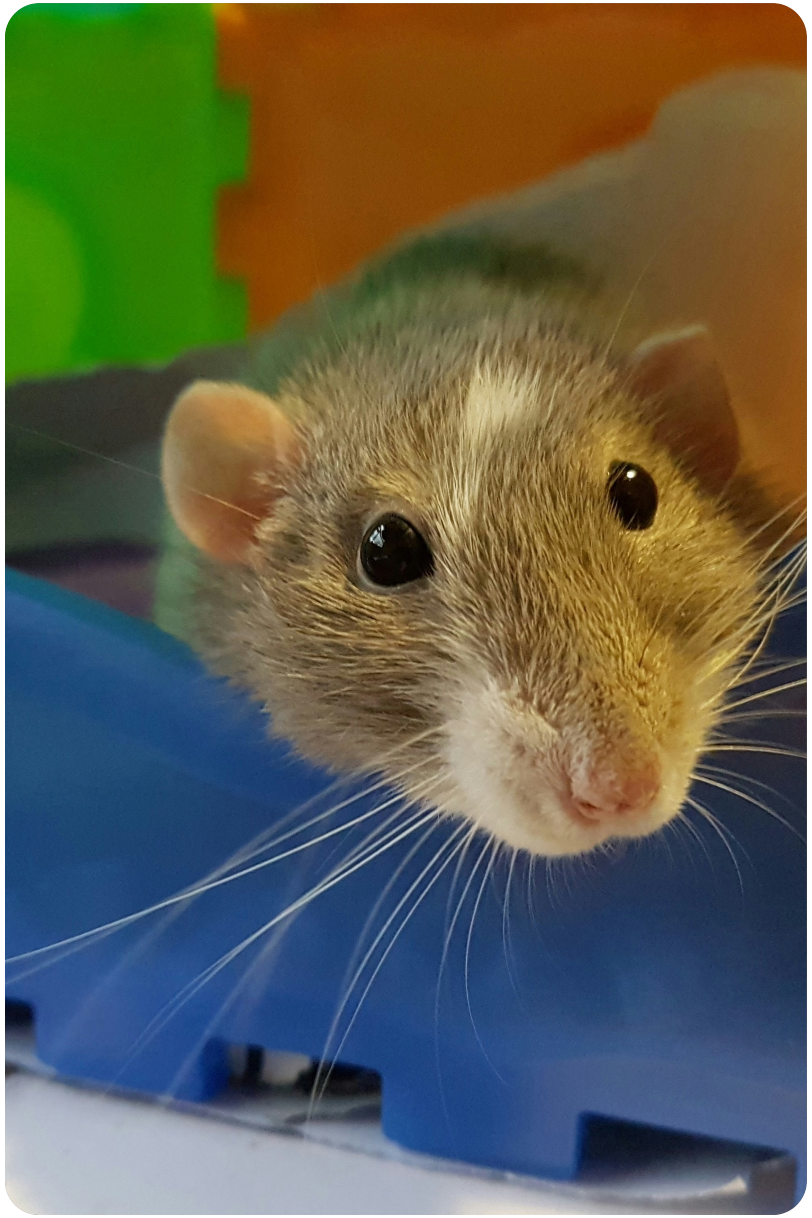
The desire for pet companionship is nearly universal; what holds people back isn't interest but logistics—costs, housing rules, and work routines. Financial Services, Insurance, and Housing brands can remove friction by making ownership more attainable and sustainable. Design products and pricing models that turn "someday I'll get a pet" into "I can afford it now."

RECOGNIZE—AND REWARD—THE PET FANATICS

Households with four or more pets exist across every income tier and community type. They represent high-frequency, high-affinity consumers who treat pet care as a core life priority. Brands that acknowledge their intensity can win outsized loyalty. Build offers, bundles, and rewards that reflect multi-pet living—not single-pet convenience.

INTEGRATE PETS INTO COUPLE + FAMILY EXPERIENCES

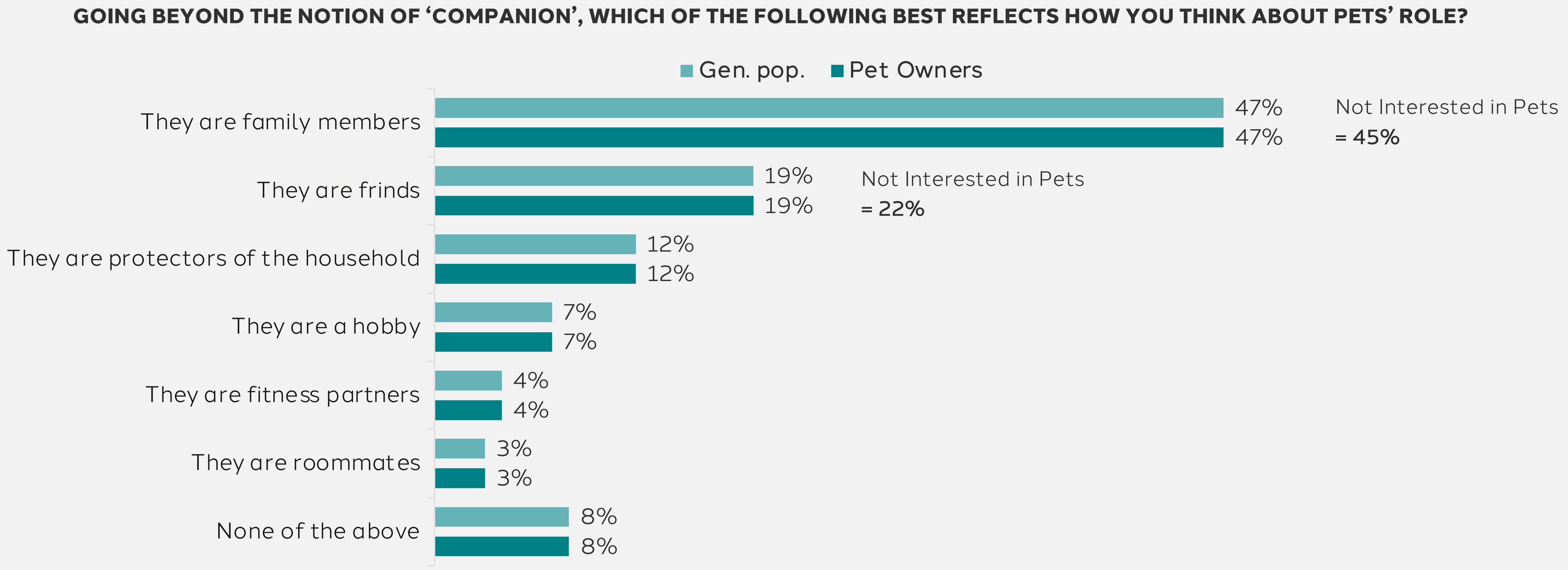
For many, pets are the connective tissue of modern family life. They bridge generations and often arrive alongside children or significant others. Extending couple- or family-oriented experiences to include pets deepens emotional resonance. Reimagine shared moments—from holidays to milestones—as "all-species" occasions: think non-chocolate Valentine's Day treats that are safe for all to enjoy, etc.



PETS ARE RESHAPING THE AMERICAN HOUSEHOLD AND ITS RITUALS
(BUSINESS IS NEXT)

MOST AMERICANS SEE PETS AS FAMILY MEMBERS, EVEN THOSE WHO DON'T HAVE ANY

Going beyond the notion of companionship, consumers are more than twice as likely to think of pets as family vs. friends. Sentiment among Pet Owners and Gen. Pop. is consistent, and consumers who are Not Interested are only slightly less likely to think of them as family members to those who have them..



LIFE STAGES INFORM HOW WE LOVE OUR PETS

Older consumers and those who don't plan to have children are even more likely to see pets as family members. Gen Zers are more likely to assign different roles to pets, including "protector" and "fitness partner."

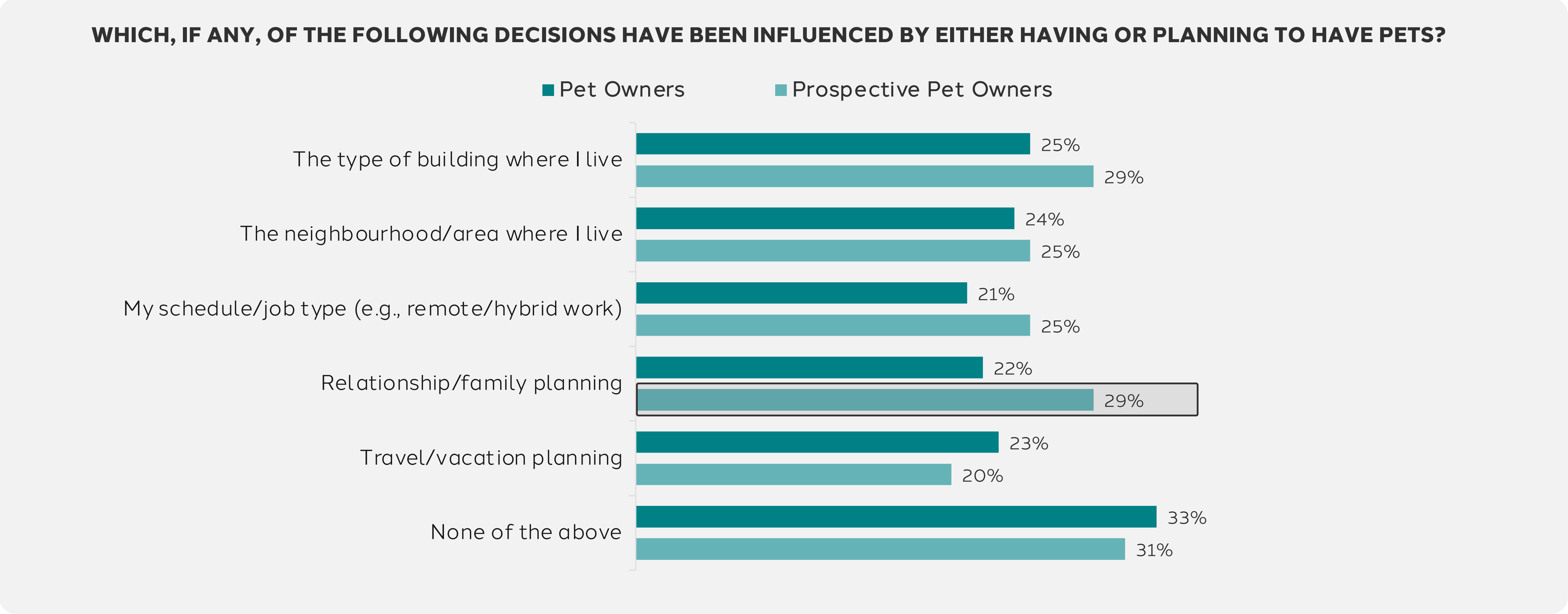
GOING BEYOND THE NOTION OF 'COMPANION' WHICH OF THE FOLLOWING BEST REFLECTS HOW YOU THINK ABOUT PETS' ROLE?

MEN	WOMEN	GEN Z	MILLENNIALS	GEN X	BOOMERS
Friends (110); Protectors (125i)	Family (115i)	Protectors (158i); Fitness partners (175i)	Friends (121i); Protectors (108i)	Family (113i)	Family (138i)

URBAN	SUBURBAN	RURAL	LIVE WITH CHILDREN	PLAN TO HAVE CHILDREN	NO CHILDREN + DON'T PLAN TO
Friends (116i)	Family (119i)	Family (108i)	Protectors (117i)	Fitness partners (225i)	Family (110i)

PET OWNERSHIP AND THE DESIRE TO HAVE PETS INFLUENCE A VARIETY OF LIFESTYLE DECISIONS.

Pet Owners choose the areas and buildings where they live to accommodate pets' needs. For 2 in 10 Pet Owners, family plans and careers are also being shaped around pets. Prospective Pet Owners over-index on their relationships and family plans being influenced by pets.



GEN ZERS ARE PICKING JOBS AND TOWNS BASED ON PETS, WHILE MILLENNIALS ARE INFLUENCED BY PETS AS THEY PLAN FAMILIES.

Women, older consumers and those who live in rural areas are less likely to have major lifestyle decisions be influenced by pets.

WHICH OF THE FOLLOWING HAVE BEEN INFLUENCED BY EITHER HAVING OR PLANNING TO HAVE PETS?

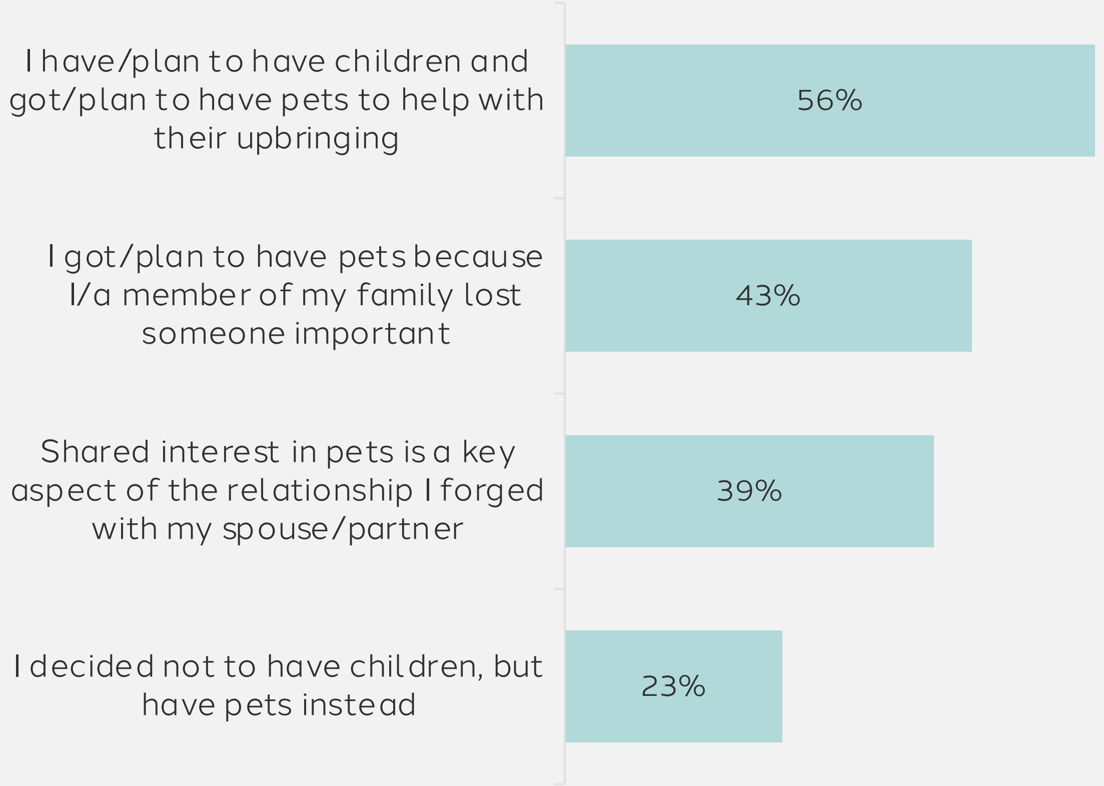
MEN	WOMEN	GEN Z	MILLENNIALS	GEN X	BOOMERS
Area where I live (116i); Travel/vacation planning (113i)	NONE OF THE ABOVE (121i)	Area where I live (145i); Schedule/job type (136i)	Relationship/family planning (145i); Building where I live (127i)	NONE OF THE ABOVE (127i)	NONE OF THE ABOVE (170i)

URBAN	SUBURBAN	RURAL	LIVE WITH CHILDREN	PLAN TO HAVE CHILDREN	NO CHILDREN + DON'T PLAN TO
Relationship/family planning (145i); Building where I live (134i)	Travel/vacation planning (109i)	NONE OF THE ABOVE (148i)	Relationship/family planning (136i); Area where I live (133i);	Schedule/job type (136i)	NONE OF THE ABOVE (145i)

FOR MOST RESPONDENTS – ESPECIALLY WOMEN AND MILLENNIALS - PET OWNERSHIP IS PLANNED AS A COMPLEMENT TO HAVING CHILDREN

Gen Xers over-index on getting pets after the loss of a loved one, while Boomers over-index on getting pets instead of children.

RELATIONSHIP/FAMILY PLANNING INFLUENCED BY OWNING/WANTING PETS



RELATIONSHIP/FAMILY PLANNING INFLUENCED BY OWNING/WANTING PETS

MEN

I decided not to have children, but have pets instead (104i)

WOMEN

I have/plan to have children and got/plan to have pets to help with their upbringing (111i)

GEN Z

Shared interest in pets is a key aspect of the relationship I forged with my spouse/partner (115i)

MILLENNIALS

I have/plan to have children and got/plan to have pets to help with their upbringing (111i)

GEN X

I got/plan to have pets because I/a member of my family lost someone important (144i)

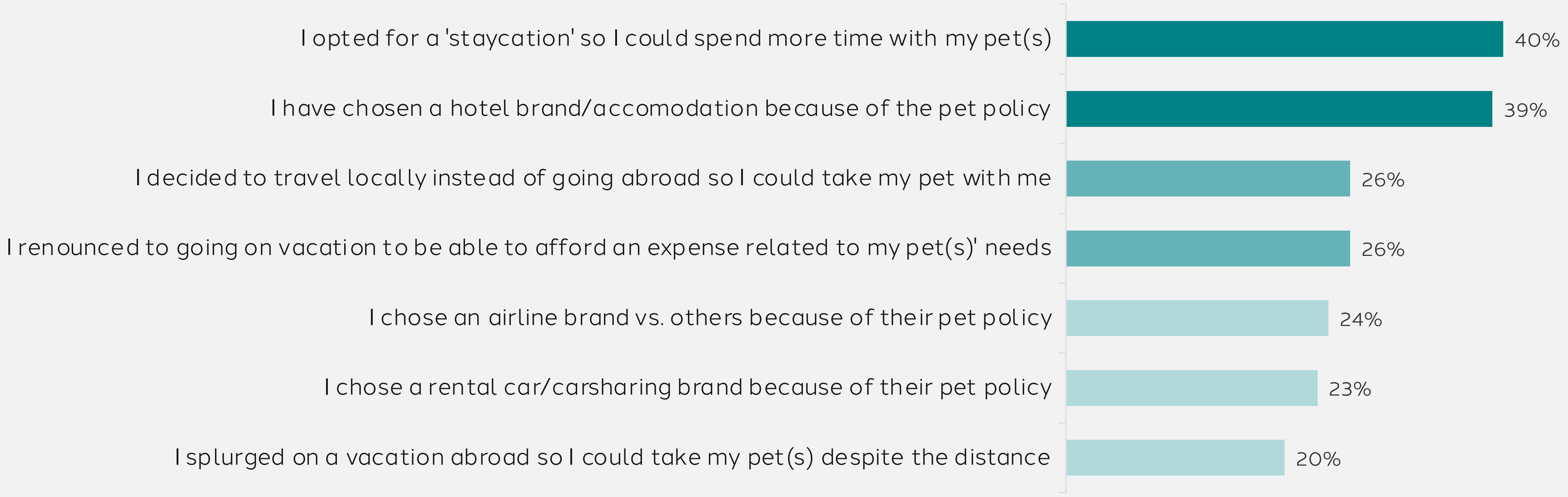
BOOMERS

I decided not to have children, but have pets instead (122i)

PET INFLUENCE TRAVEL DECISIONS, FROM NOT GOING ON VACATION TO BRAND SELECTION WHEN TRAVELLING.

‘Staycations’ and the selection of hotel brands/accommodations are most likely to be informed by having/planning to get pets.

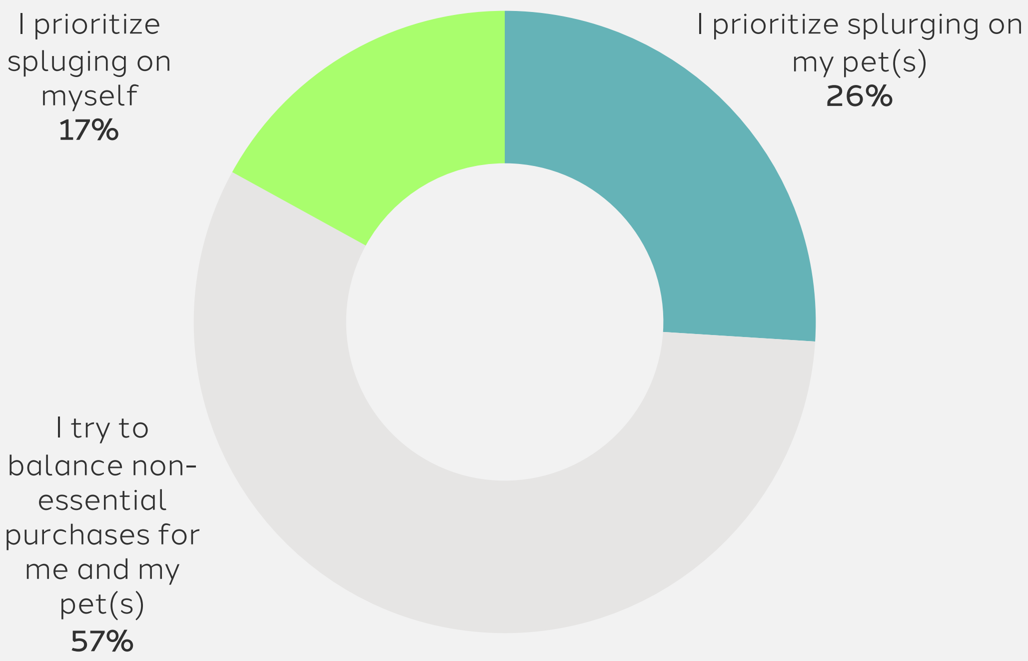
WHICH, IF ANY, OF THE FOLLOWING DECISIONS HAVE BEEN INFLUENCED BY EITHER HAVING OR PLANNING TO HAVE PETS?



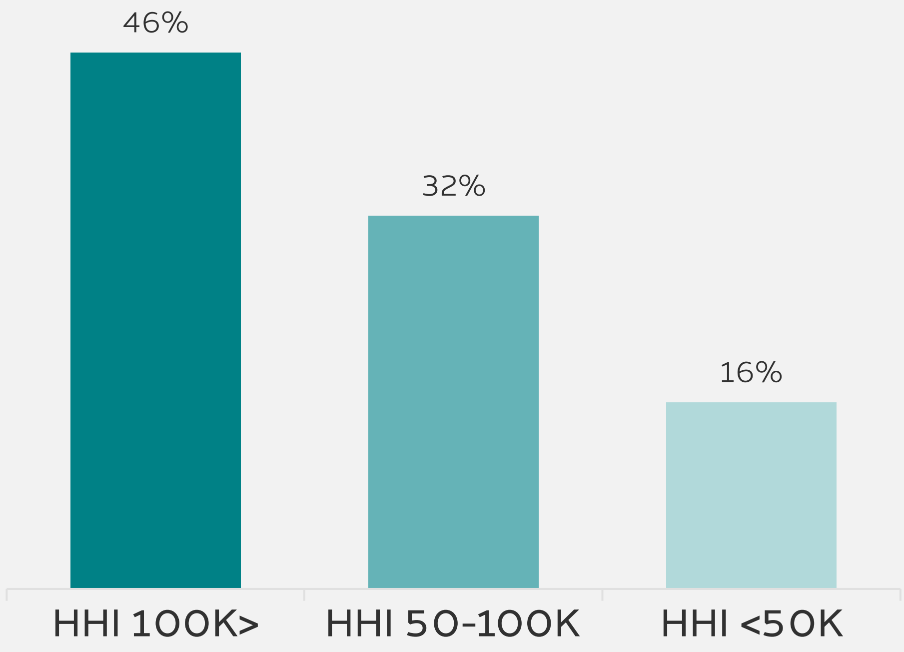
PET OWNERS TEND TO SPLURGE ON THEIR PETS AS MUCH, IF NOT MORE, THAN ON THEMSELVES.

Expectedly, this behavior is driven by those with a higher household income.

WHICH OF THE FOLLOWING BEST REFLECTS HOW YOU NORMALLY BEHAVE WHEN YOU HAVE A LITTLE EXTRA TO SPEND?



"I PRIORITIZE SPLURGING ON MY PET(S)"



AMERICANS ARE READY TO TRADE OFF NON-ESSENTIAL EXPENSES TO PRIORITIZE PET CARE AND PET PAMPERING

They are more likely to be willing to give up on expensive meals and big-ticket item purchases than they are on giving up on celebrating milestones and going on vacation– but agreement to trade-offs is high across the board.

TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS? (*)

75%

"IF I HAD TO, I WOULD GIVE UP ON MAKING A NON-ESSENTIAL EXPENSIVE PURCHASE (E.G., A NEW CAR, GOING ON VACATION) TO LOOK AFTER MY PET'S NEEDS"

72%

"I WOULD FOREGO DINING AT AN EXPENSIVE RESTAURANT TO BUY A SPECIAL TREAT/ITEM FOR MY PET INSTEAD"

66%

"IF I HAD TO, I WOULD GIVE UP ON SPENDING MY SAVINGS ON HOSTING AN IMPORTANT CELEBRATION (E.G., WEDDING, SWEET SIXTEEN) TO LOOK AFTER MY PET'S NEEDS"

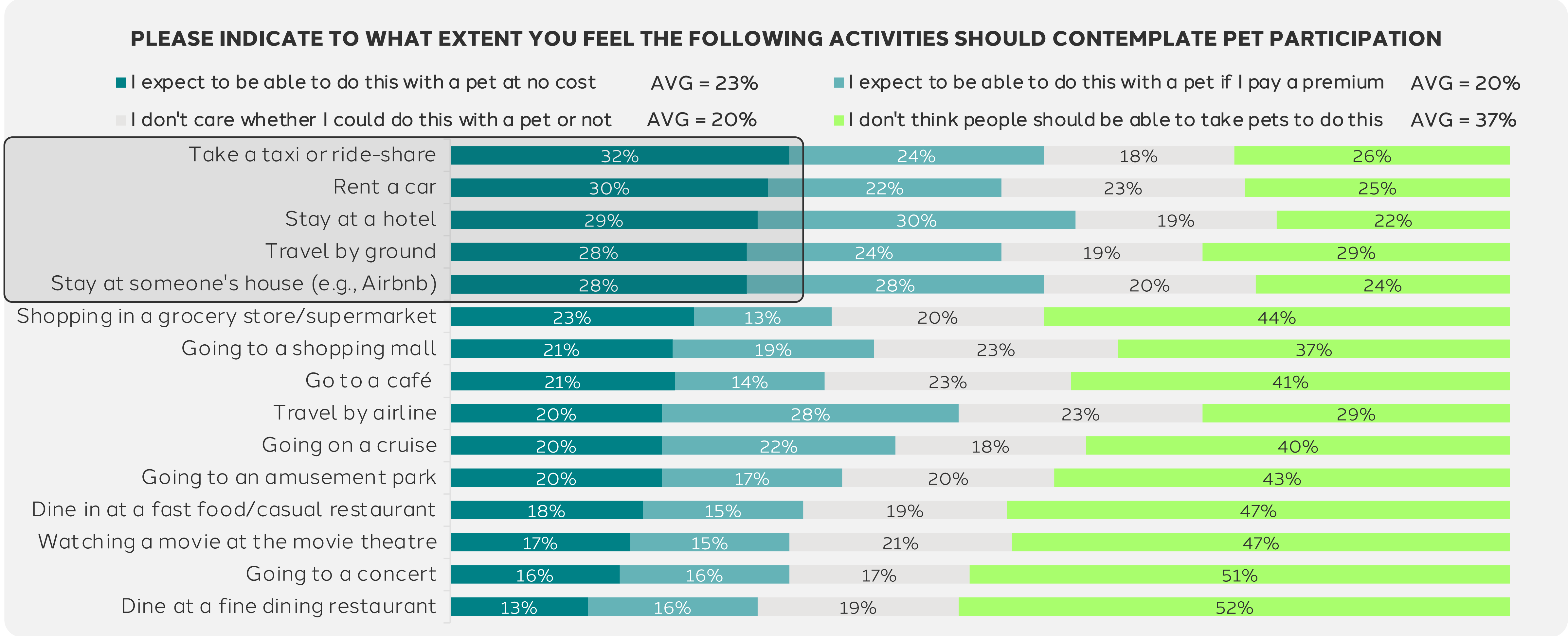
61%

"I WOULD NOT GO ON VACATION TO BE ABLE TO SPEND MORE TIME WITH MY PET INSTEAD"

(*) Only asked to Pet Owners + Prospective Pet Owners

BY AND LARGE, AMERICANS EXPECT PET TO BE ABLE TO TAKE PART IN MOST OF THEIR ROUTINE ACTIVITIES, ESPECIALLY IF THEY ARE WILLING TO PAY A PREMIUM

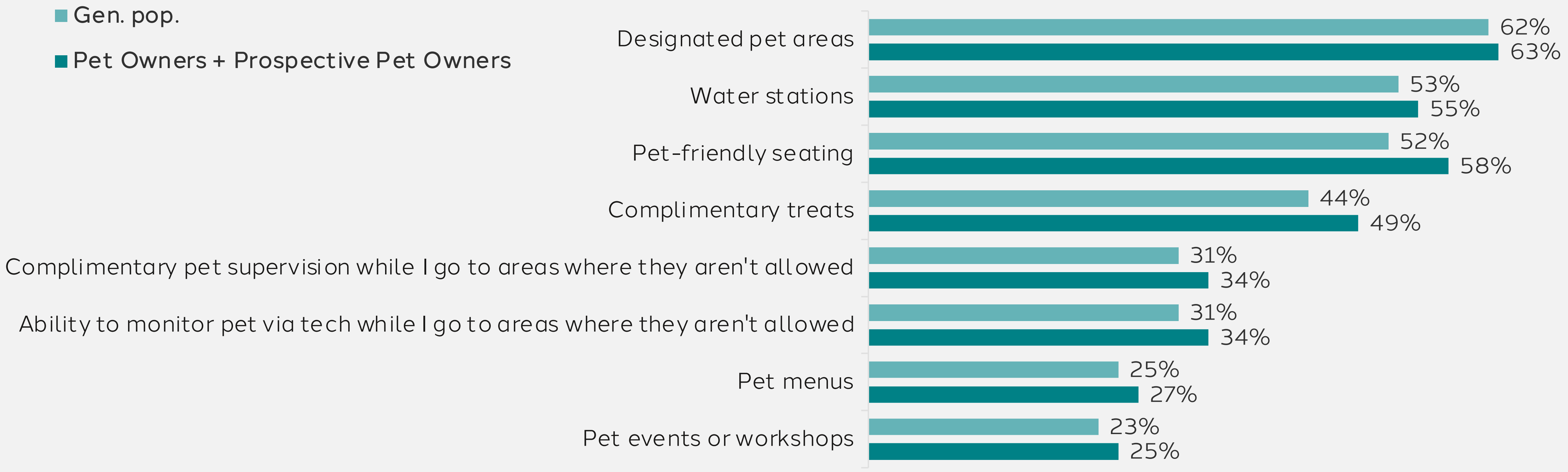
Travel and hospitality brands, beware: except for cruises, pets are expected to be accommodated across most experiences.



THE BAR TO BEING RECOGNIZED AS A ‘PET-FRIENDLY’ BUSINESS IS GETTING RAISED

Consumers are in line with the expectations that those who own or plan to own pets have. Most expect designated pet areas, water stations, friendly seating and complimentary treats. Pet safety is next, either via complimentary supervision or via tech-enabled monitoring.

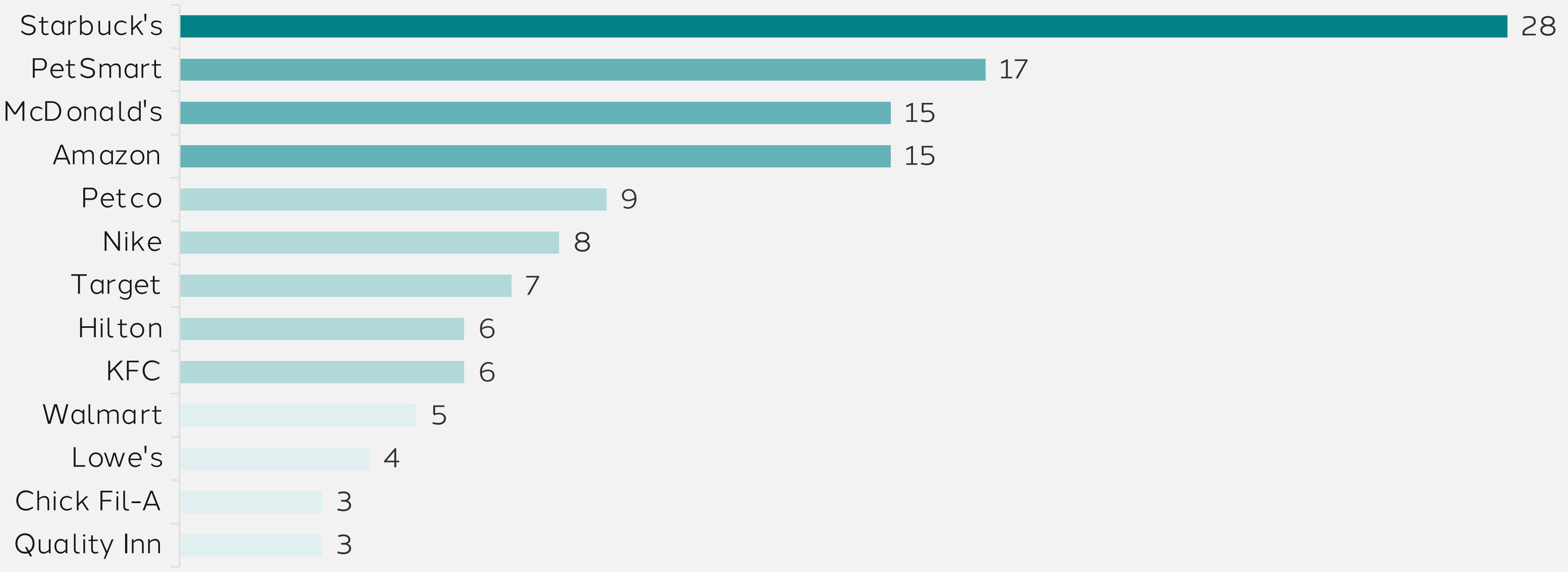
WHICH OF THE FOLLOWING DO YOU EXPECT BUSINESSES THAT DESCRIBE THEMSELVES AS ‘PET-FRIENDLY’ SHOULD HAVE?



STARBUCK'S STANDS OUT IN CONSUMERS' PERCEPTION AS THE EPITOME OF A PET FRIENDLY BUSINESS

Among non-pet brands, Amazon and McDonald's also garner a significant number of mentions. Between pet brands, PetSmart garners almost twice as many mentions as Petco.

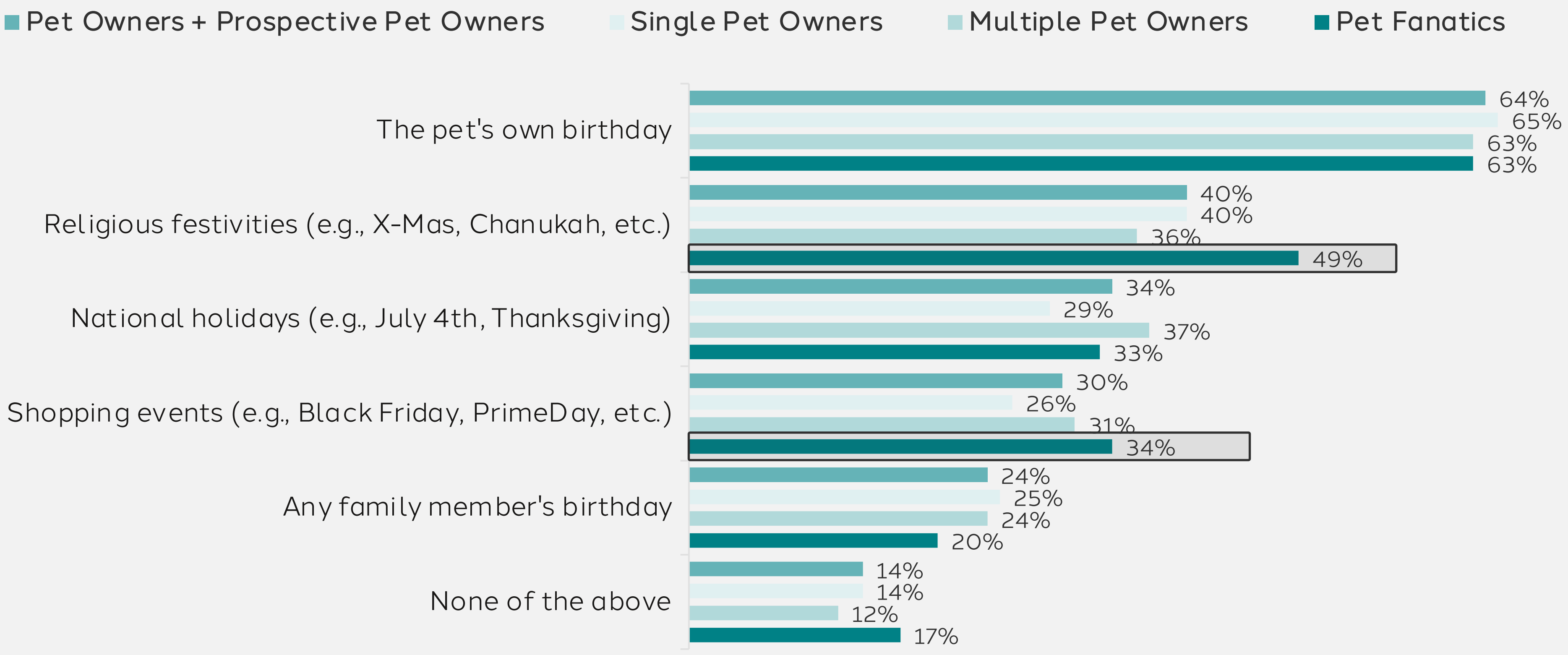
THINKING ABOUT RETAIL, TRAVEL & DINING EXPERIENCES, WHICH BRANDS STOOD OUT FOR BEING PET-FRIENDLY? (# OF RESPONDENT MENTIONS)



A LARGE SHARE OF SPECIAL OCCASIONS ARE CELEBRATED WITH A PURCHASE FOR PETS.

Pets' birthdays, obviously – but purchases for religious festivities like X-Mas are also widespread. Having more pets to deal with, Pet Fanatics over-index on X-Mas and shopping event-based purchases for pets.

ON WHICH OF THE FOLLOWING OCCASIONS DO/WOULD YOU PURCHASE GIFTS OR SPECIAL TREATS FOR YOUR PET(S)?



SECTION 03

IMPLICATIONS FOR MARKETERS

COMPETE ON PET INCLUSION, NOT JUST PET POLICY

“Pet-friendly” is no longer a differentiator — it’s a baseline expectation. Consumers compare hotels, airlines, and restaurants by how seamlessly they accommodate pets. Raise the bar from ‘allowed’ to ‘welcomed.’ Make pets visible in every stage of the experience, from booking filters to in-store amenities.

DESIGN FOR ELECTIVE PET PURCHASES DURING KEY RETAIL CALENDAR MOMENT

Birthdays, holidays, and shopping events like Black Friday are now joint celebrations for pets and people. Design retail, promo, and gifting activations that make pets part of every occasion. The more brands lean into “pet-centric joy,” the more incremental sales they unlock.

SOLVE CONSUMERS’ ‘FOMP’ (FEAR OF MISSING PETS)

As consumers hesitate to travel or dine without their pets, tech-enabled supervision, live-streaming, and comfort-care services become emotional reassurance tools. Integrate convenience and connection — from pet-cams to on-site care — to free people to re-engage with experiences they’re currently avoiding.

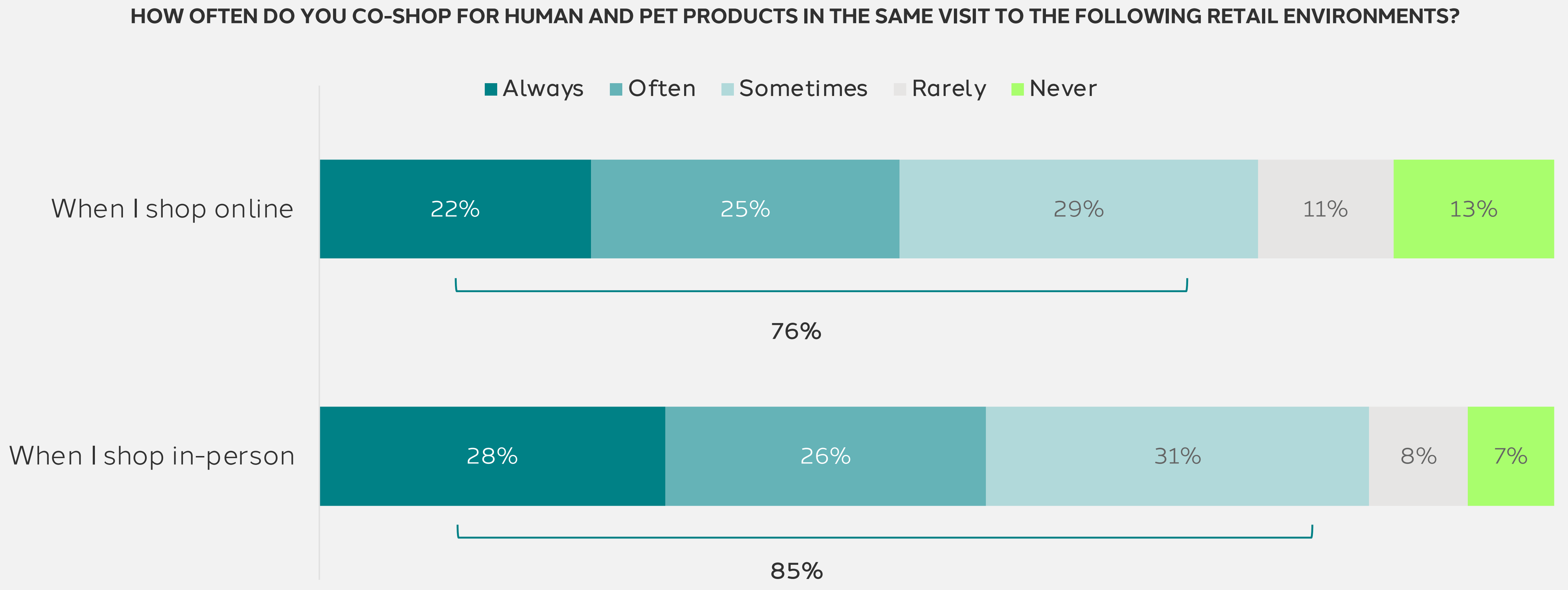
REDEFINE HOSPITALITY AROUND THE MULTI-SPECIES FAMILY

The modern household includes fur, feathers, and fins. Experiences built for couples or kids now feel incomplete if pets are excluded. Reimagine “family” through a multi-species lens — create environments, packages, and communications where every member, human or not, belongs.

PETS CAN MAKE OR BREAK BRANDS
(NOT JUST THE PET ONES)

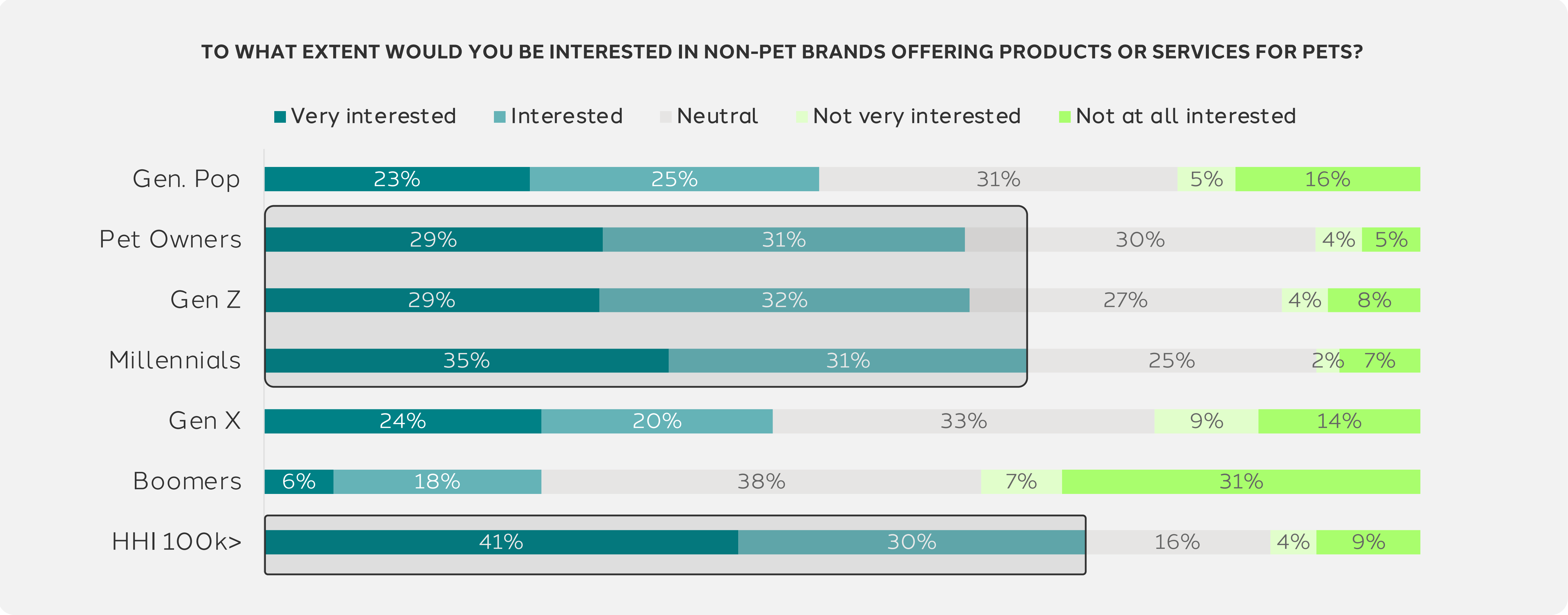
MOST OF THE TIME, PET OWNERS CO-SHOP FOR HUMAN AND PET PRODUCTS IN THE SAME RETAIL EXPERIENCE

This is even more likely to occur when they shop in person.



‘PET-IFICATION’ REPRESENTS A TANGIBLE OPPORTUNITY FOR NON-PET BRANDS

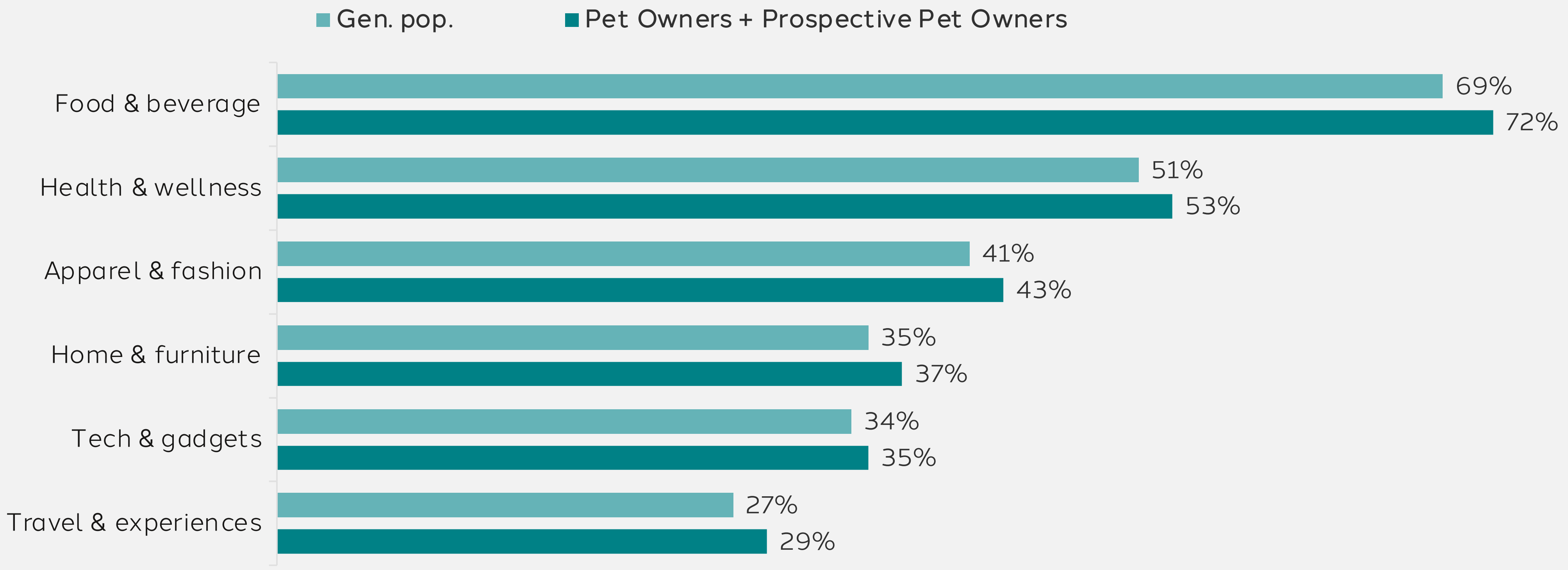
Almost half of consumers are interested in non-pet brands launching products or services for pets. Pet Owners, Gen Z and Millennials are even more likely to be interested. Interestingly for brands, higher household income consumers are very much interested.



CONSUMERS FEEL FOOD & BEVERAGE AND HEALTH & WELLNESS BRANDS CAN MORE CREDIBLY BRANCH INTO PET PRODUCTS

Pet Owners' preferences are consistent with those of Gen. Pop.

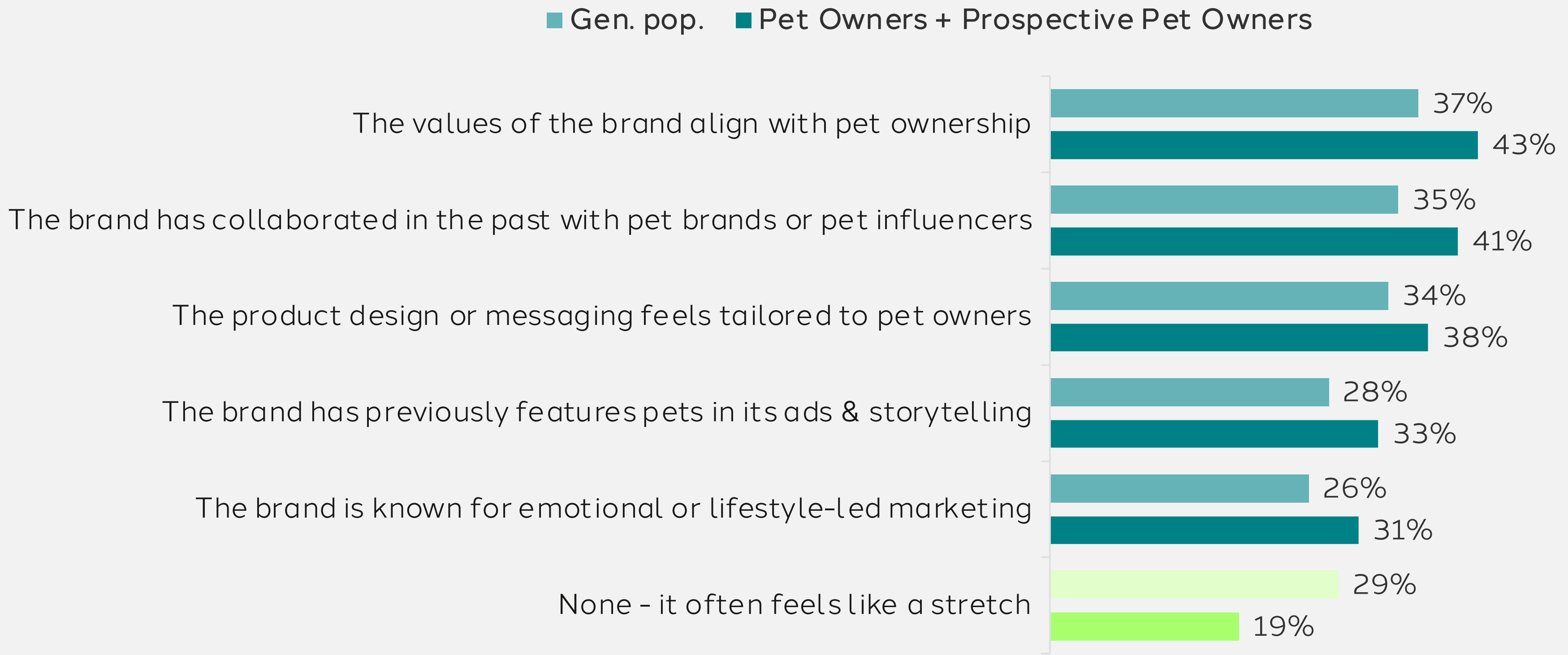
WHICH BRAND CATEGORIES DO YOU THINK COULD MORE CREDIBLY OFFER PET-FOCUSED PRODUCTS?



BRANCHING INTO PET PRODUCTS WORKS BEST WHEN IT RESTS ON COMPATIBLE BRAND VALUES AND PAST COLLABS

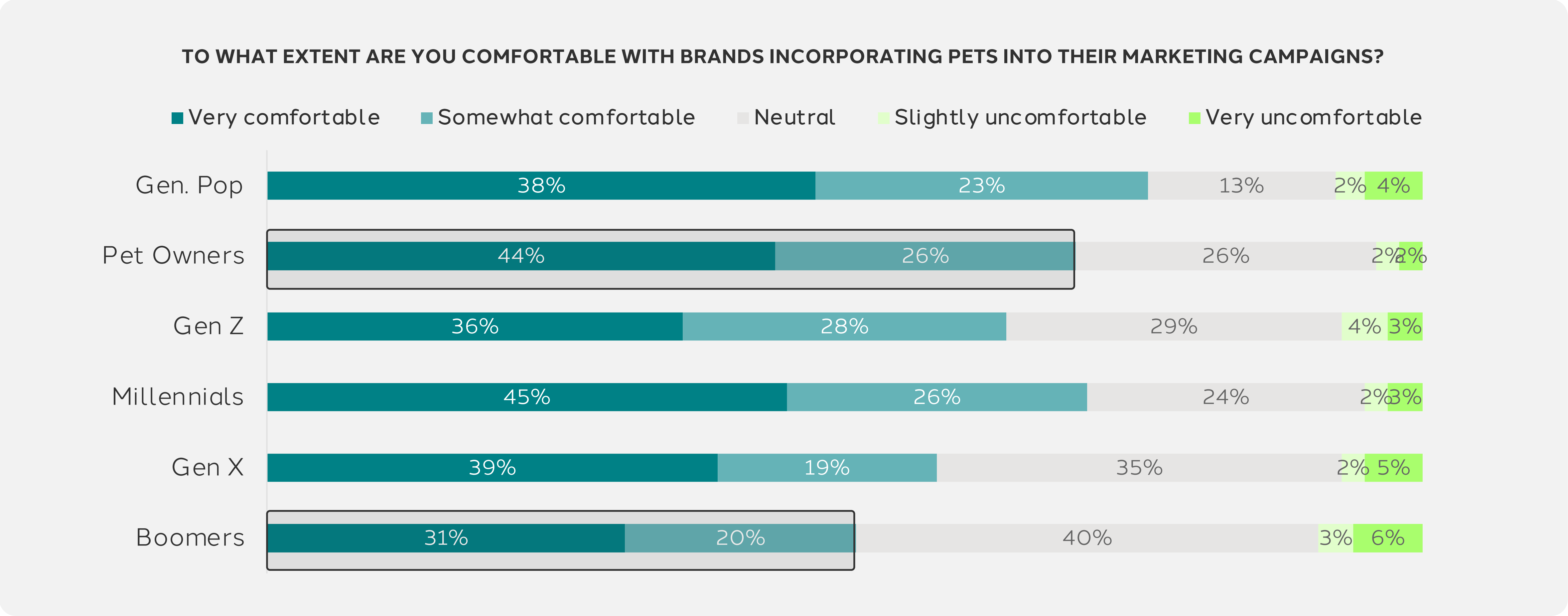
Pet Owners are specifically looking for product designs and messaging that cater to them as individuals.

WHICH BRAND CATEGORIES DO YOU THINK COULD MORE CREDIBLY OFFER PET-FOCUSED PRODUCTS?



MARKETING CAMPAIGNS INCORPORATING PETS ARE GENERALLY WELL RECEIVED

Interestingly, Pet Owners are slightly less comfortable with it than Gen. Pop. Boomers are significantly less comfortable than other cohorts.



PET INFLUENCERS CAN BE A POWERFUL ALLY TO BRANDS IN REACHING A LARGE SHARE OF U.S. CONSUMERS (NOT ONLY PET OWNERS)

1 in 3 Americans follow them. More than half of Gen Zers and Millennials do.

DO YOU FOLLOW PET INFLUENCERS (I.E., SOCIAL MEDIA ACCOUNTS DEDICATED TO A SPECIFIC PET)?

"I FOLLOW ONE OR MORE PET INFLUENCERS"

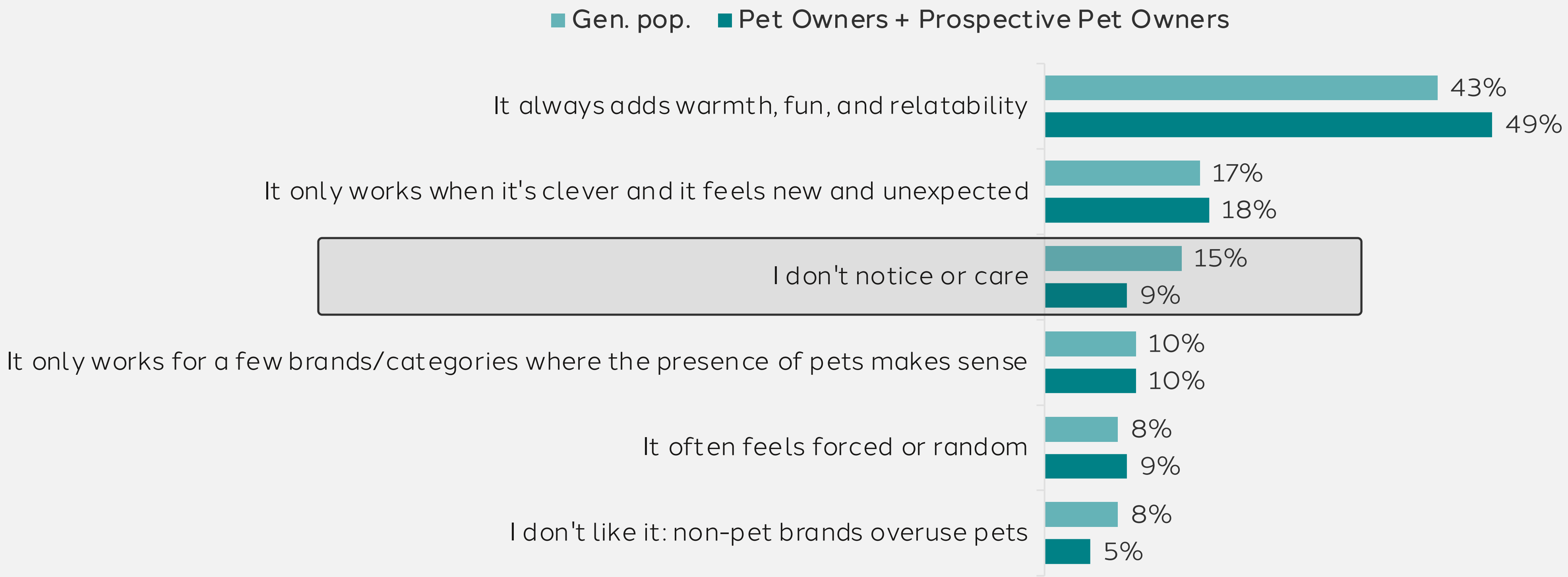
MEN	WOMEN
41%	31%

GEN Z	MILLENNIALS
57%	53%
GEN X	**BOOMERS**
31%	9%

MOST CONSUMERS FEEL THAT PETS BRING A POSITIVE ENERGY TO ADS FOR NON-PET BRANDS.

Pet Owners + Prospective Pet Owners are significantly more likely to notice that pets are being featured.

WHICH OF THE FOLLOWING BEST REFLECTS HOW YOU FEEL ABOUT WHEN NON-PET BRANDS FEATURE PETS IN THEIR ADS?



CONSUMERS WANT MORE PET-SAFE EVERYDAY PRODUCTS AND EASIER TO UNDERSTAND PET POLICIES FROM TRAVEL & QSR BRANDS

2 in 3 would like products around their home (e.g., snacks, household essentials, etc.) to more clearly indicate whether they are pet safe. Interest in snacks that both humans and pets can eat is also high.

TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS?

64%

"I WOULD LIKE IT IF ALL THE PRODUCTS I HAVE AROUND MY HOME MORE CLEARLY INDICATED WHETHER THEY ARE SAFE FOR PETS OR NOT"

60%

"I WOULD LIKE IT IF RESTAURANTS / FAST FOOD CHAINS MORE CLEARLY INDICATED ON THEIR WEBSITE/APPS WHAT THEIR PET POLICY IS"

58%

"I WOULD LIKE IT IF MORE OF THE SNACKS I EAT WERE SAFE FOR PETS TOO, AND INDICATED PET PORTION SIZES ON THEIR PACKAGING"

46%

"I FIND IT HARD TO UNDERSTAND THE PET POLICY ON MOST TRAVEL/HOTEL WEBSITES AND APPS"

PET OWNERS ARE LIKELY TO REWARD PET BRANDS THAT EMPATHIZE WITH THEM AND NON-PET BRANDS THAT CROSS THE PEOPLE/PET DIVIDE

Interest in therapy/counselling for pets is also surprisingly high: almost 4 in 10 Pet Owners. Most Pet Owners would purchase insurance for all their pets if they could afford it.

TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS?

57%

"I AM MORE LIKELY TO CONTINUE PURCHASING PET BRANDS THAT SHOW EMPATHY TOWARDS ME WHEN I AM GRIEVING THE LOSS OF A PET"

51%

"I AM MORE LIKELY TO PURCHASE APPAREL BRANDS THAT DEVELOP PET CLOTHING COLLECTIONS"

51%

"I DO/WOULD PURCHASE PET INSURANCE FOR ALL MY PETS"

38%

"I AM INTERESTED IN SECURING THERAPY/COUNSELING FOR ONE OR MORE OF MY PETS"

SECTION 04

IMPLICATIONS FOR MARKETERS

TREAT “PET-IFICATION” AS YOUR NEXT ADJACENCY, NOT A GIMMICK

Consumers already expect their favorite brands to make room for their pets. Whether you’re in food, apparel, beauty, or wellness, extending into pet lines is now a credibility play, not a novelty. Test crossover collections and co-branded experiences that blur the line between human and pet products.

BUILD EMOTION THROUGH THE PET LENS

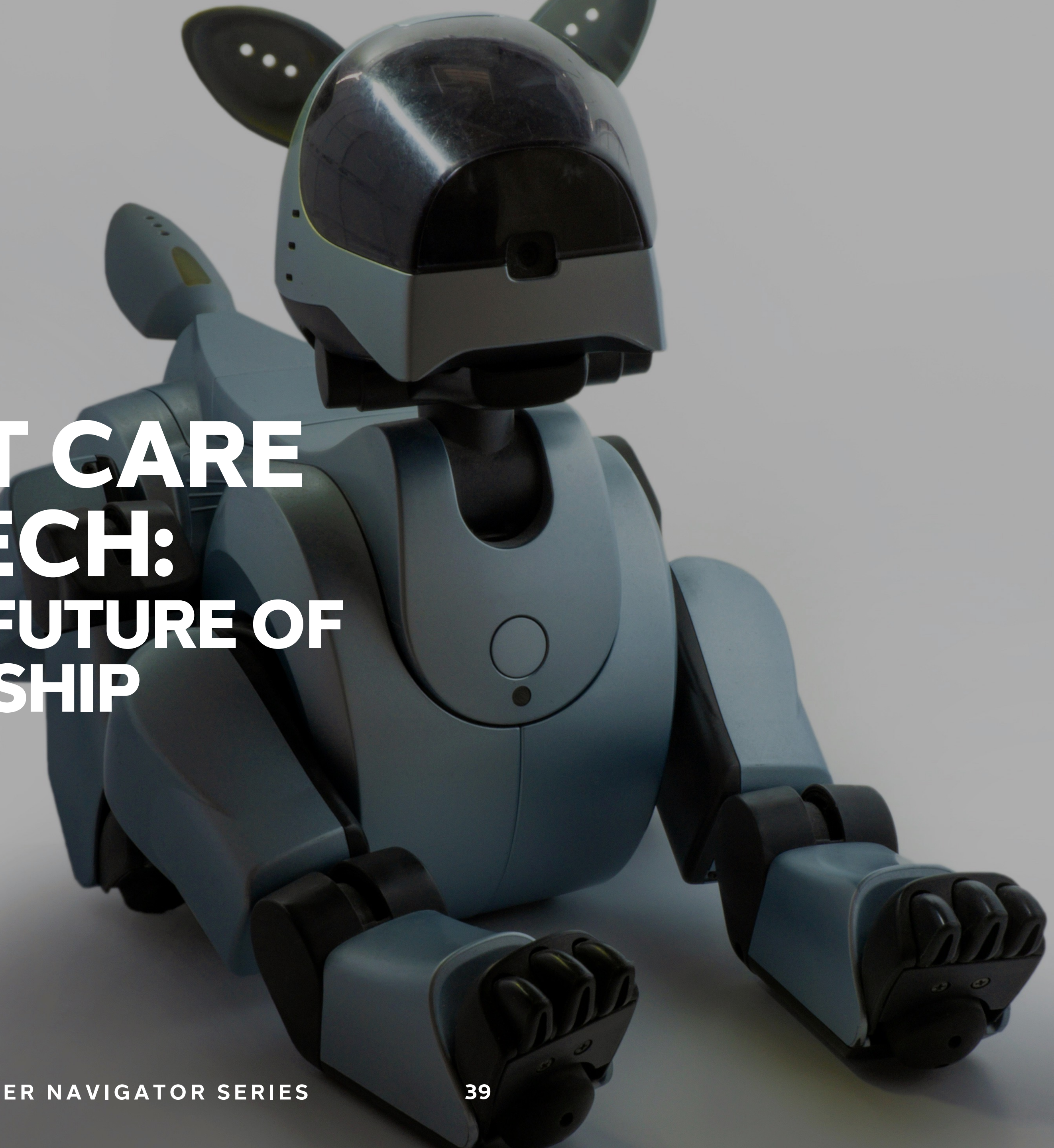
Pets are a cultural shortcut to warmth and authenticity. From social content to brand storytelling, they deliver instant empathy. Use pets strategically to humanize your brand — not as props, but as emotional connectors that embody care, loyalty, and joy.

MAKE PET SAFETY AND POLICY RADICAL TRANSPARENCY MOMENTS.

Consumers are anxious about what’s safe for their pets and frustrated by vague policies. Lead with clarity — label products, publish pet-friendly guidelines, and make inclusion easy to find. Transparency here builds trust across every category.

EXTEND EMPATHY BEYOND OWNERSHIP MOMENTS

Pet relationships carry grief, joy, and deep attachment. Brands that recognize that emotional spectrum create enduring loyalty. Design touchpoints — from bereavement messaging to insurance offers — that acknowledge the full emotional lifecycle of pet companionship.

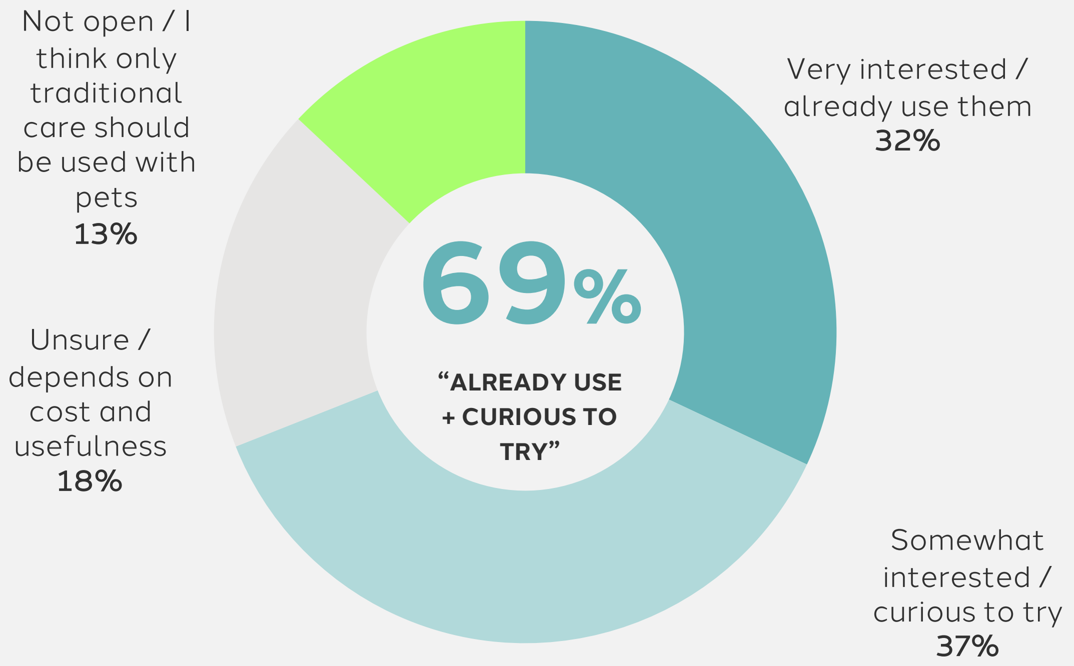


FROM PET CARE TO PET TECH:
THE DIGITAL FUTURE OF COMPANIONSHIP

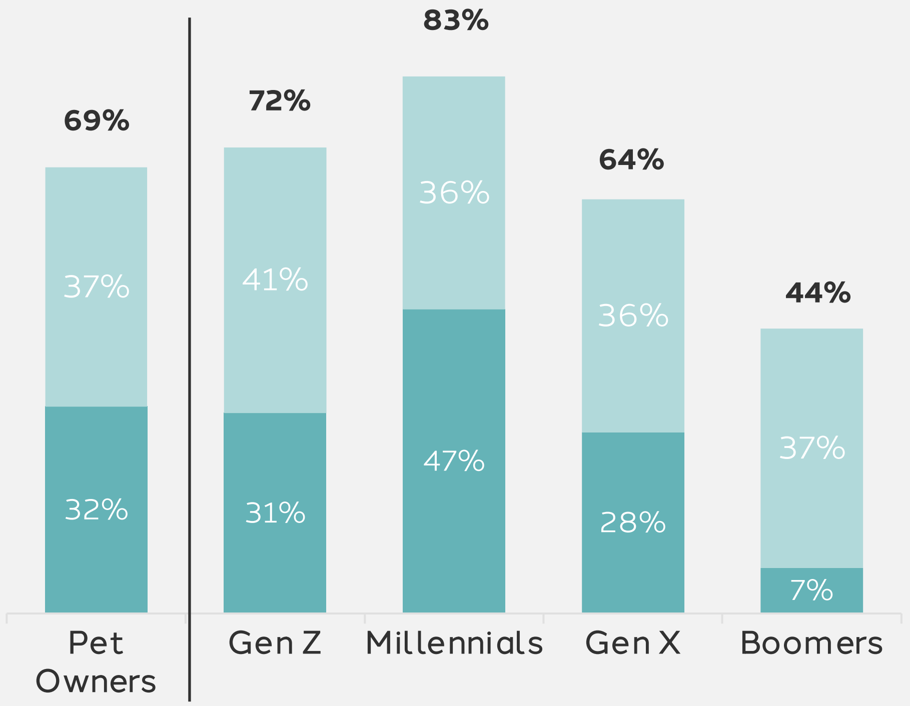
INTEREST IN TECH DEVICES FOR PETS IS HIGH AMONG ALL CONSUMERS, AND 1 IN 3 PET OWNERS HAVE ALREADY ADOPTED THEM

Millennials over-index in both using these devices and being curious to try them, while Boomers are more skeptical.

HOW OPEN WOULD YOU BE TO USING TECH PRODUCTS FOR PET (E.G., SMART COLLARS, AI TOYS, HEALTH TRACKERS)?



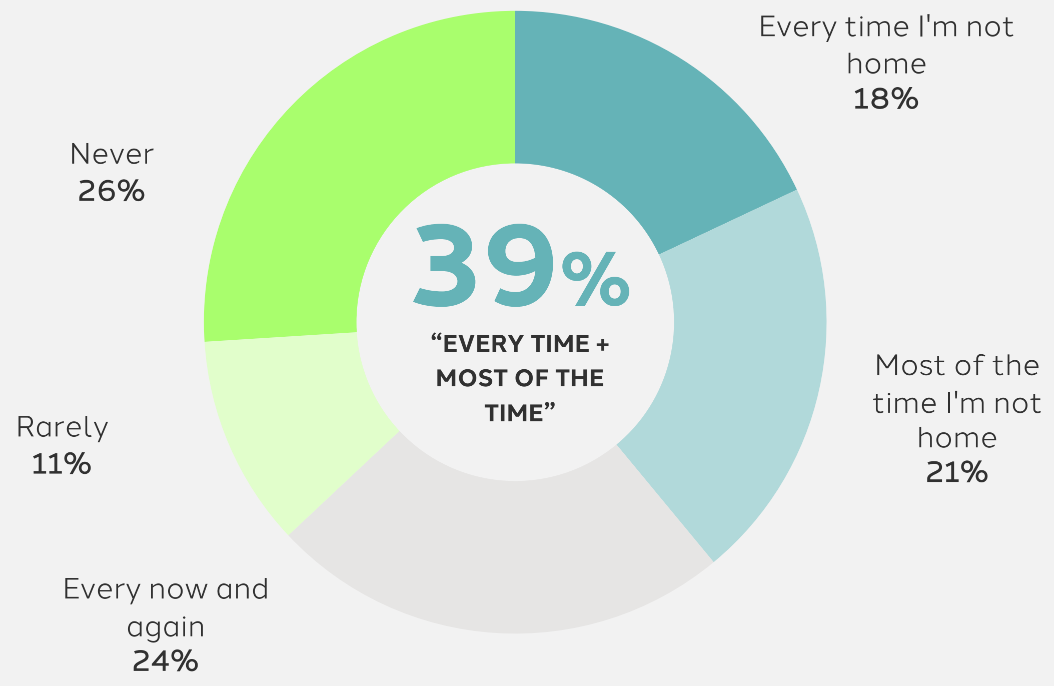
"I ALREADY USE THEM + CURIOUS TO TRY THEM"



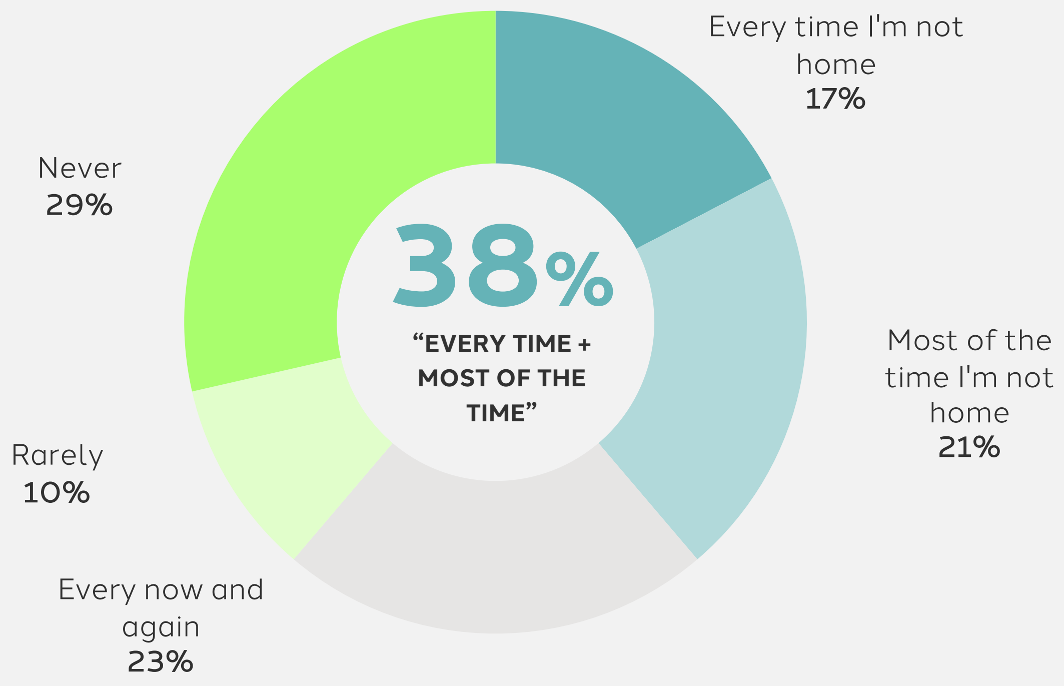
A LARGE SHARE OF PET OWNERS TURN TO PET-DEDICATED CONTENT AND SMART DEVICES TO ENTERTAIN PETS AND CONNECT WITH THEM WHEN THEY ARE AWAY

Only 1 in 4 never uses pet-dedicated content. This share is slightly higher for smart devices.

HOW OFTEN DO YOU USE PET-DEDICATED CONTENT ON YOUR HOME DEVICES (E.G., TV, ETC.) TO ENTERTAIN YOUR PET WHILE YOU'RE GONE?



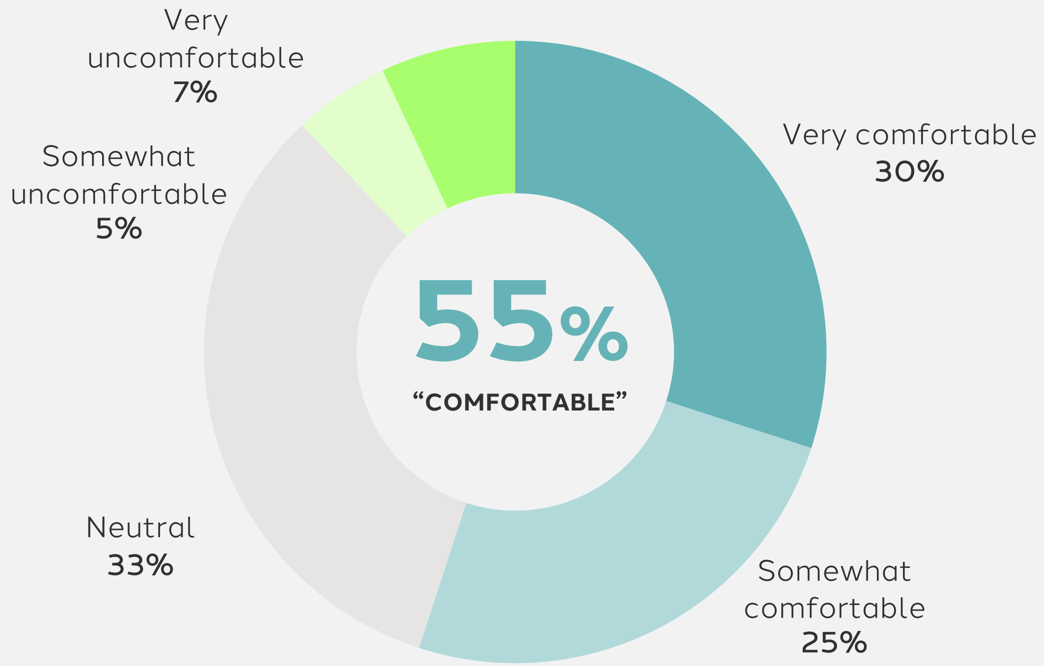
HOW OFTEN DO YOU USE PET-FOCUSED SMART DEVICES (E.G., CAMERAS, TREAT DISPENSERS, ETC.) TO MONITOR/CONNECT WITH YOUR PET WHILE YOU'RE GONE?



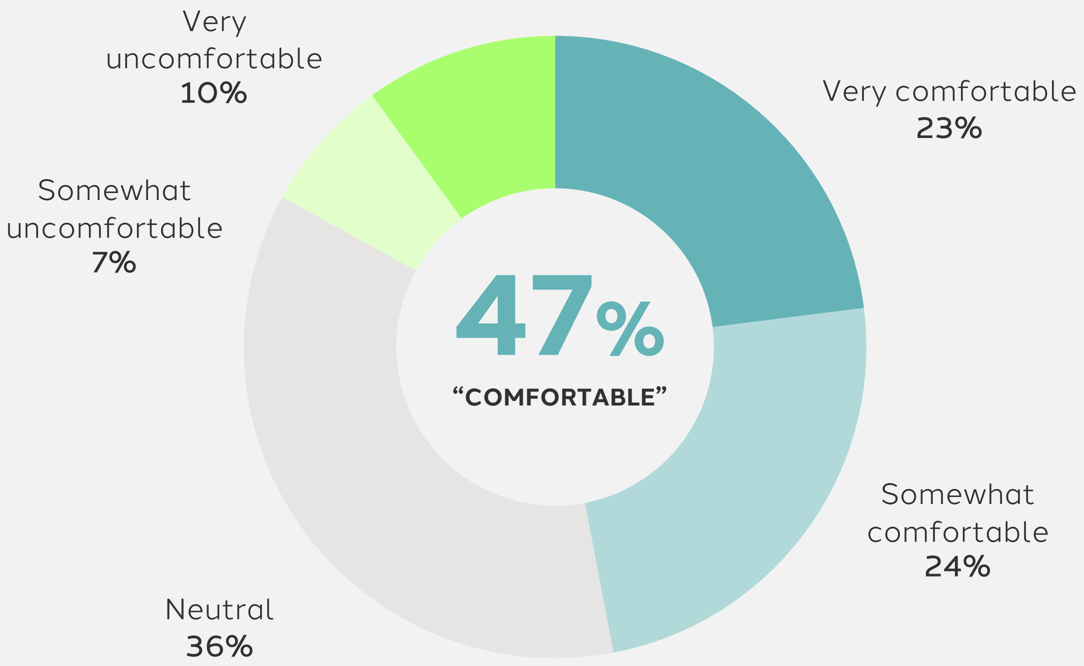
MOST AMERICANS ARE COMFORTABLE WITH THE NOTION OF TECHNOLOGY PLAYING A BIGGER ROLE IN PETS' LIVES

The level of comfort is higher for tech-enabled pet care, while more consumers are on the fence when it comes to AI interacting with pets.

HOW COMFORTABLE ARE YOU WITH PET HEALTH TECHNOLOGY (E.G., TRACKING ACTIVITY, DETECTING ILLNESSES, OFFERING CARE SUGGESTIONS)?



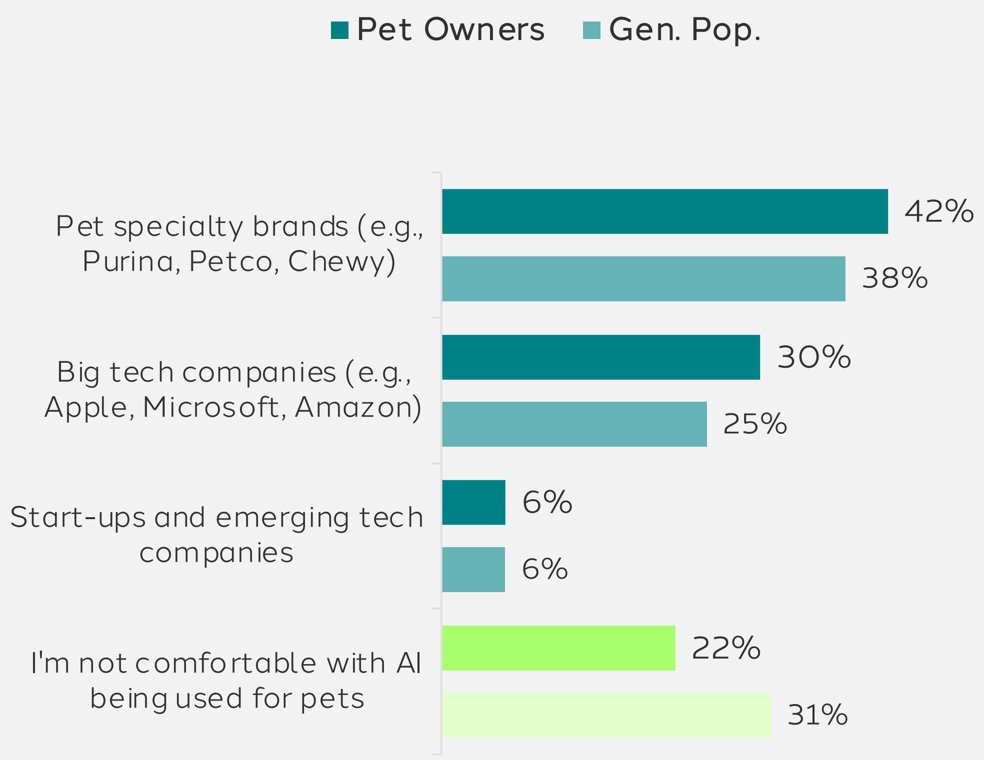
HOW COMFORTABLE ARE YOU WITH AI TECHNOLOGY INTERACTING WITH YOUR PETS (E.G., TRACKING BEHAVIOURS, INTERACTING WITH THEM)?



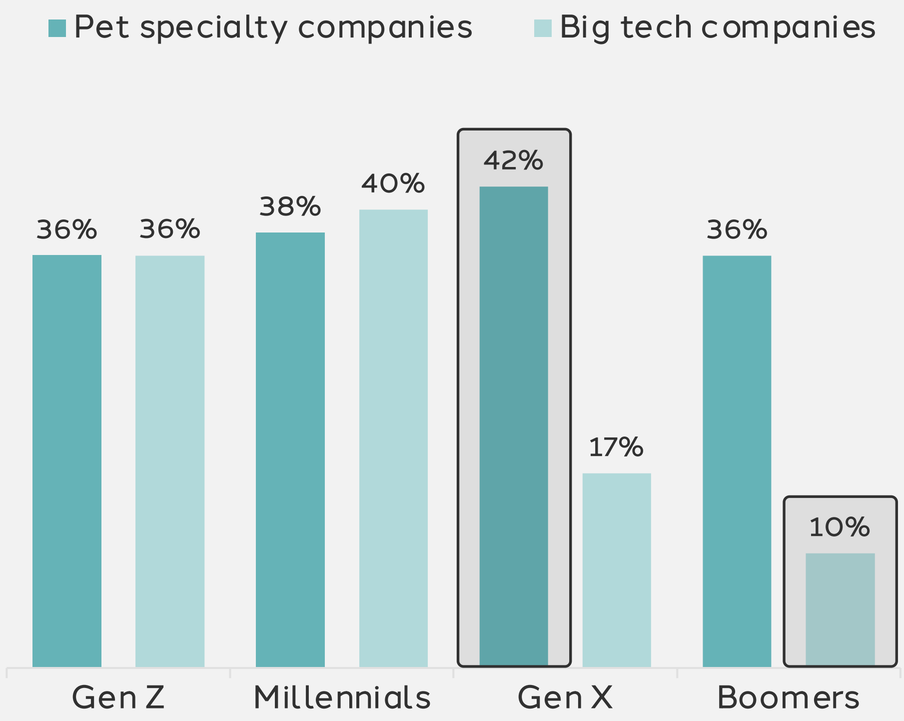
CONSUMERS TRUST PET SPECIALTY BRANDS TO DEVELOP AI FOR PET USE MORE THAN THEY TRUST TECHNOLOGY COMPANIES TO DO SO

Pet Owners and older consumer cohorts, especially Gen X, drive trust in pet specialty brands. Boomers are most likely not to trust Big Tech.

WHICH TYPE OF BRAND WOULD YOU TRUST THE MOST TO DEVELOP AI TECHNOLOGY FOR PETS?



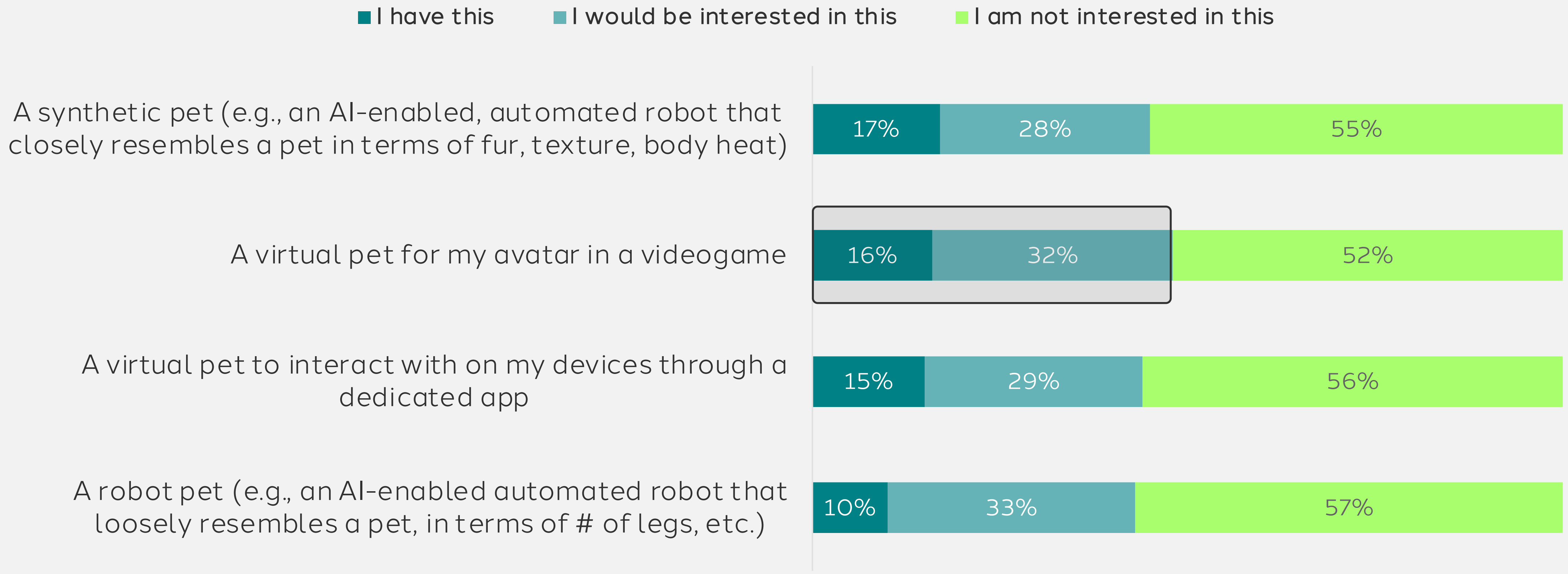
WHICH TYPE OF BRAND WOULD YOU TRUST THE MOST TO DEVELOP AI TECHNOLOGY FOR PETS?



CONSUMERS ARE SPLIT WHEN IT COMES TO INTEREST IN TECH-ENABLED PETS

Interest is highest in virtual pets to accompany consumers' avatars in video games.

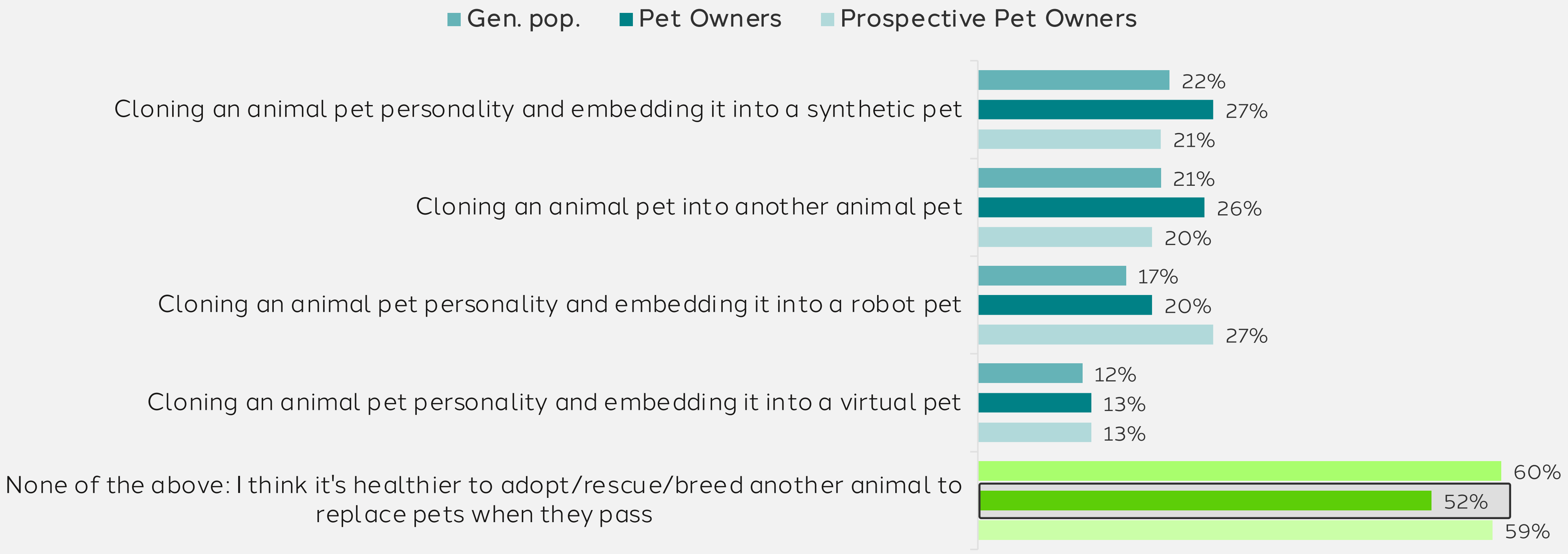
WHICH, IF ANY, OF THE FOLLOWING TECH-ENABLED PETS DO YOU HAVE OR WOULD BE INTERESTED IN HAVING?



AMERICANS – AND PET OWNERS ABOVE ALL – ARE GETTING READY FOR THE ATTACK OF THE PET CLONES

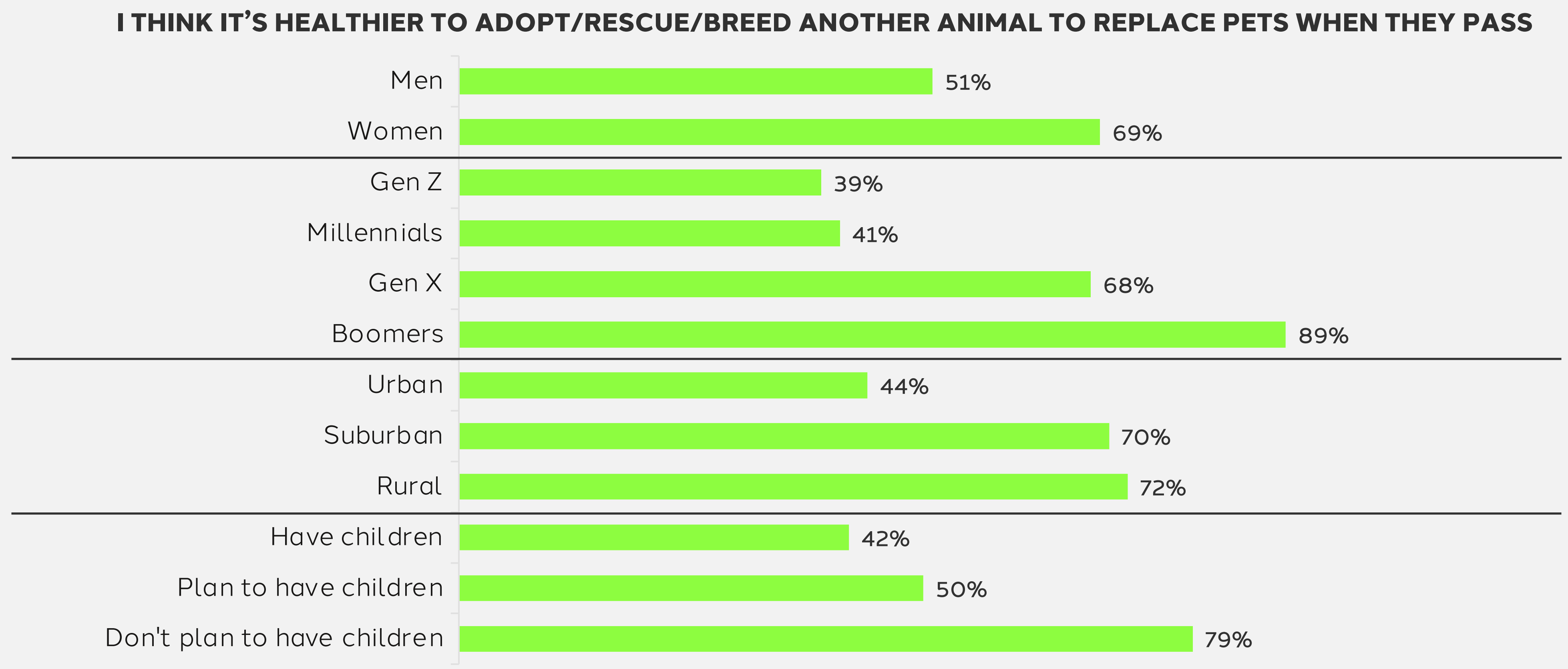
Cloning an animal's personality into a synthetic pet garners more interest than cloning pets into other animals. Interestingly, Pet Owners are less likely to be opposed to the notion of cloning animals or their personalities.

WHICH OF THE FOLLOWING 'PET CLONES' WOULD INTEREST YOU, IF TECH MADE IT POSSIBLE & YOU HAD THE FINANCIAL MEANS TO AFFORD THEM?



MEN, YOUNGER CONSUMERS, AND AMERICANS WHO LIVE IN URBAN AREAS ARE MORE LIKELY TO BE OPEN TO THE NOTION OF PET CLONES

Possibly due to the practical implications tied to owning 'animal' pets who need looking after, consumers who live with children in their household are also more likely to be open to this idea.



IMPLICATIONS FOR MARKETERS

BUILD TRUST AT THE INTERSECTION OF PETS AND TECH

Consumers are far more willing to hand their data — and their pets — to brands they already trust. Pet specialists have the credibility; tech firms have the capability. Form alliances that merge emotional trust with technological mastery, white-labeling where needed to scale faster than Big Tech can.

TURN “FOMP” INTO A PLATFORM FOR INNOVATION

The anxiety of leaving pets alone is birthing new categories — connected feeders, live-stream cams, AI-powered companions. Design or partner around experiences that soothe separation guilt and extend everyday connection — from smart-home integrations to content bundles that keep owners emotionally tethered.

PREPARE FOR A HYBRID FUTURE OF REAL AND VIRTUAL COMPANIONS

As AI companions, clones, and robotic pets move from fiction to marketplace, pet care will splinter between the physical and the synthetic. Decide early whether your brand leads that frontier or stands for the authenticity of real-world animal bonds — either position can win if it’s owned with conviction.

RE-IMAGINE LOYALTY IN A CONNECTED PET ECOSYSTEM

When the pet, the home, and the device are all part of one data loop, the definition of brand loyalty changes. Use connected services, behavioral data, and predictive care to create always-on relationships — not just transactions — between owners, pets, and your brand.

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THANK YOU

INNOVATING TO IMPACT

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