



FoodScience®

# Understanding the Consumer

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Trusted to help people and their pets live healthier lives every day since 1973





# 8% of US HH buy pet supplements

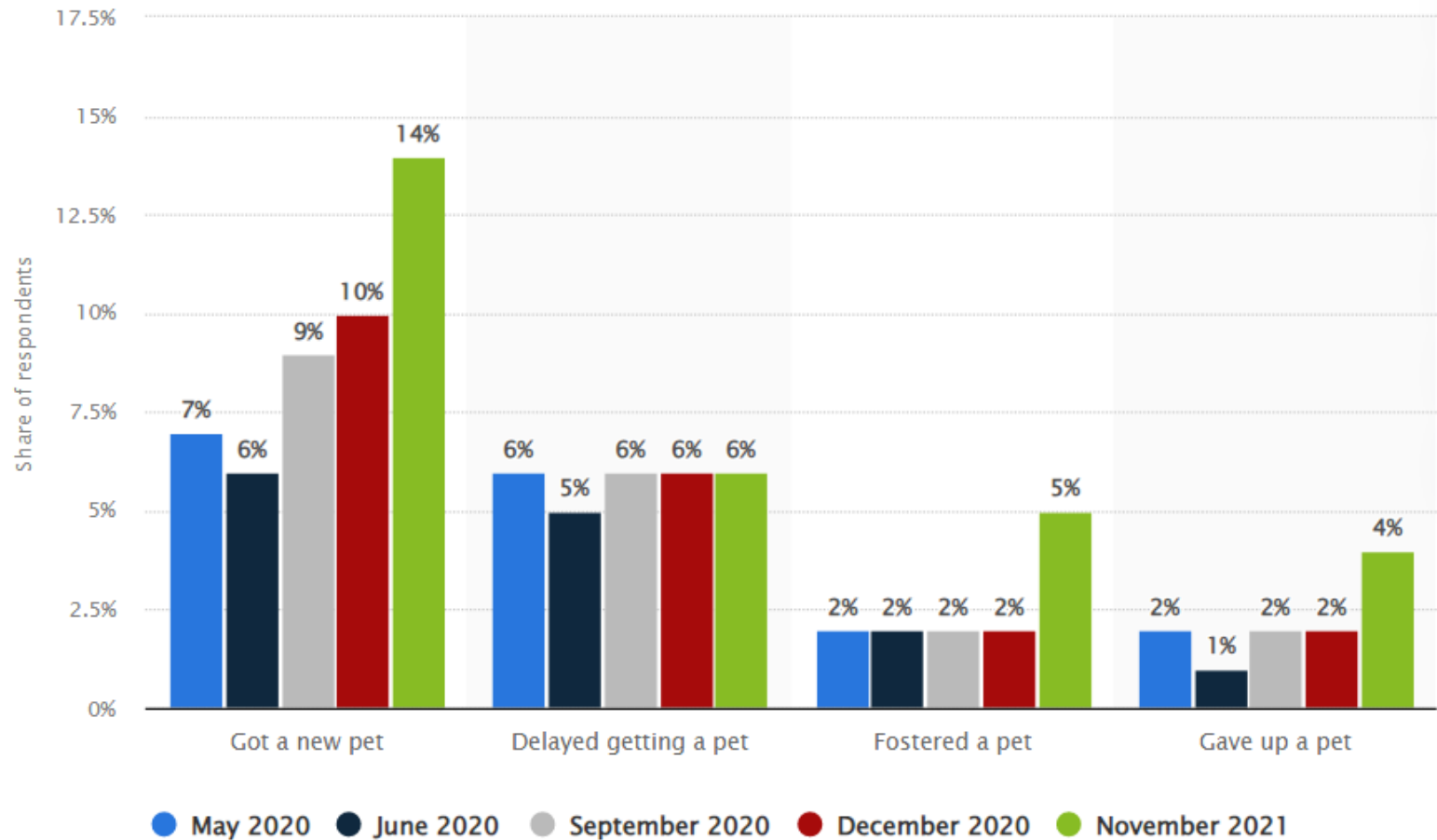


34%

25%



# COVID Influenced Changes in Pet Ownership



# Benefits of Pet Ownership

Reduced stress  
and anxiety

Companionship

Lower  
blood  
pressure

Increased  
physical activity

Lower  
cholesterol

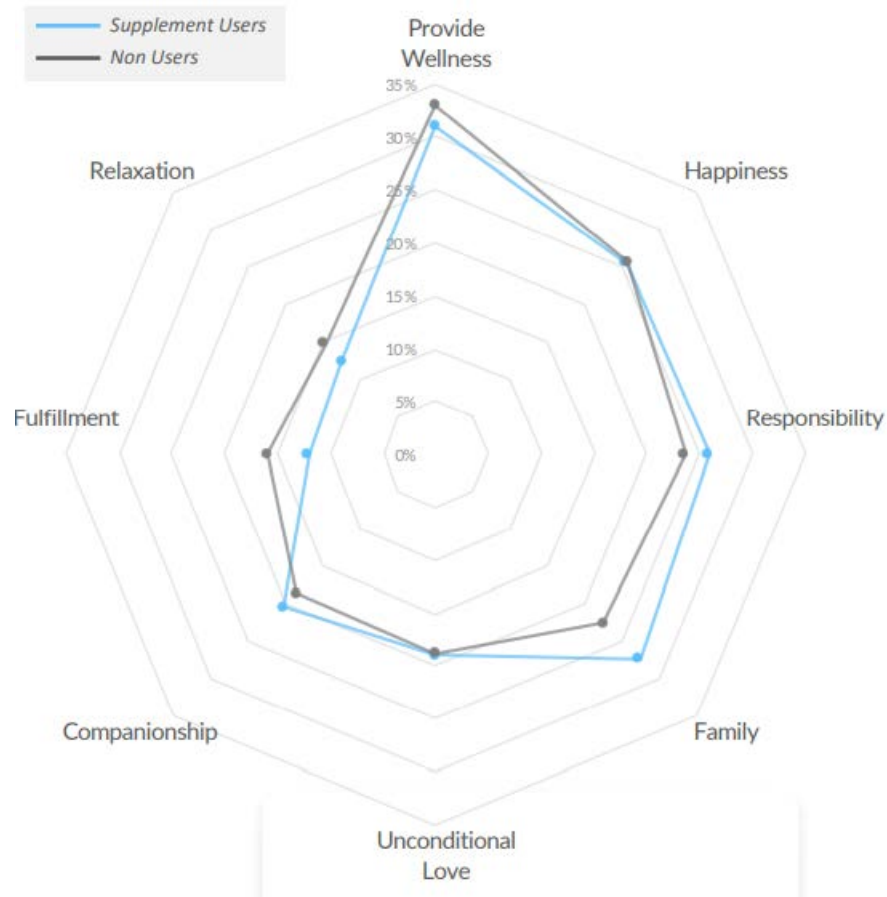
More  
opportunities  
to get  
outdoors and  
socialize





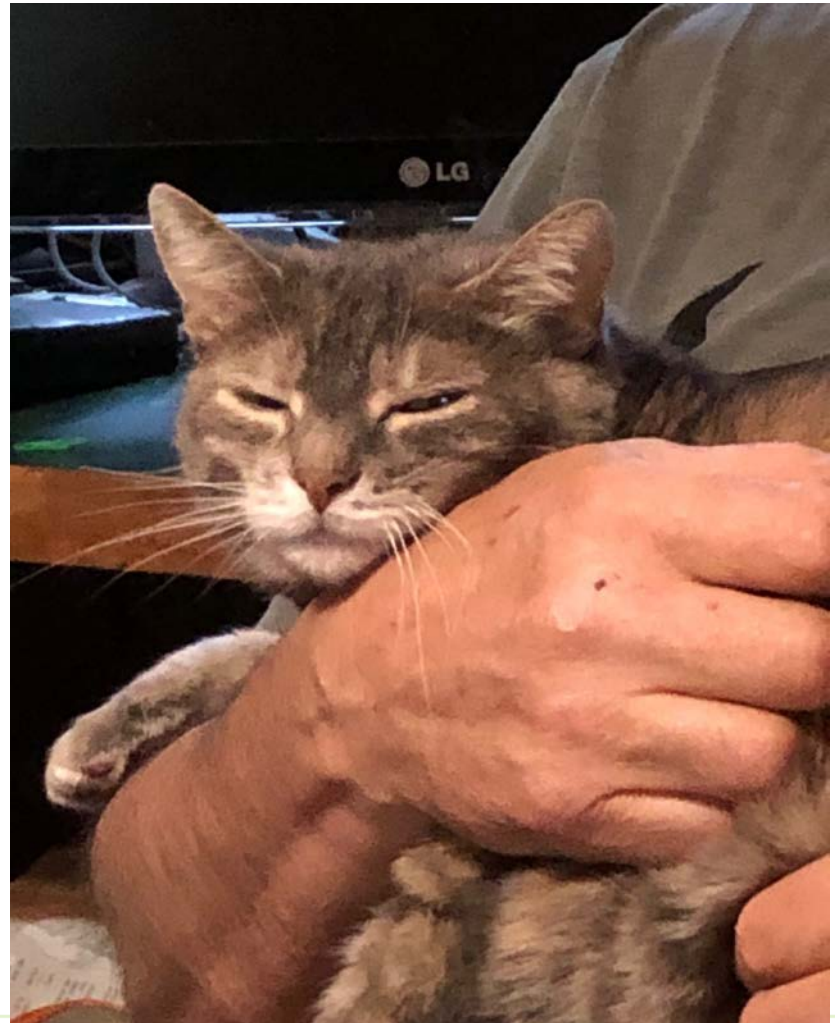


# Do Pet Supplement Users Feel Differently Than Non-Users?



# Fur Babies?

58% of non-users  
42% of users





# Who Is More Likely To Be A Pet Supplement User?

- Inexperienced or Experienced pet owner?

**Most Likely =**

Dog/cat owners who have previously owned **1 or 2 pets**

**Least Likely =**

Dog/cat owners who have had **5 to 6 pets**



# Why or Why Not?

1. My pets are healthy enough without them
2. Supplements are too expensive
3. I don't know what to buy
4. Proper nutrition is enough
5. My pet won't take them



# Supplements Are Just For Older Pets

Most users start giving supplements between 1 – 2 years



# What Are The Top Choice Drivers?

1. Specific health benefit (2X)
2. Price
3. Quality certifications (NASC)
4. Specific ingredient
5. Format (chew, liquid, etc)



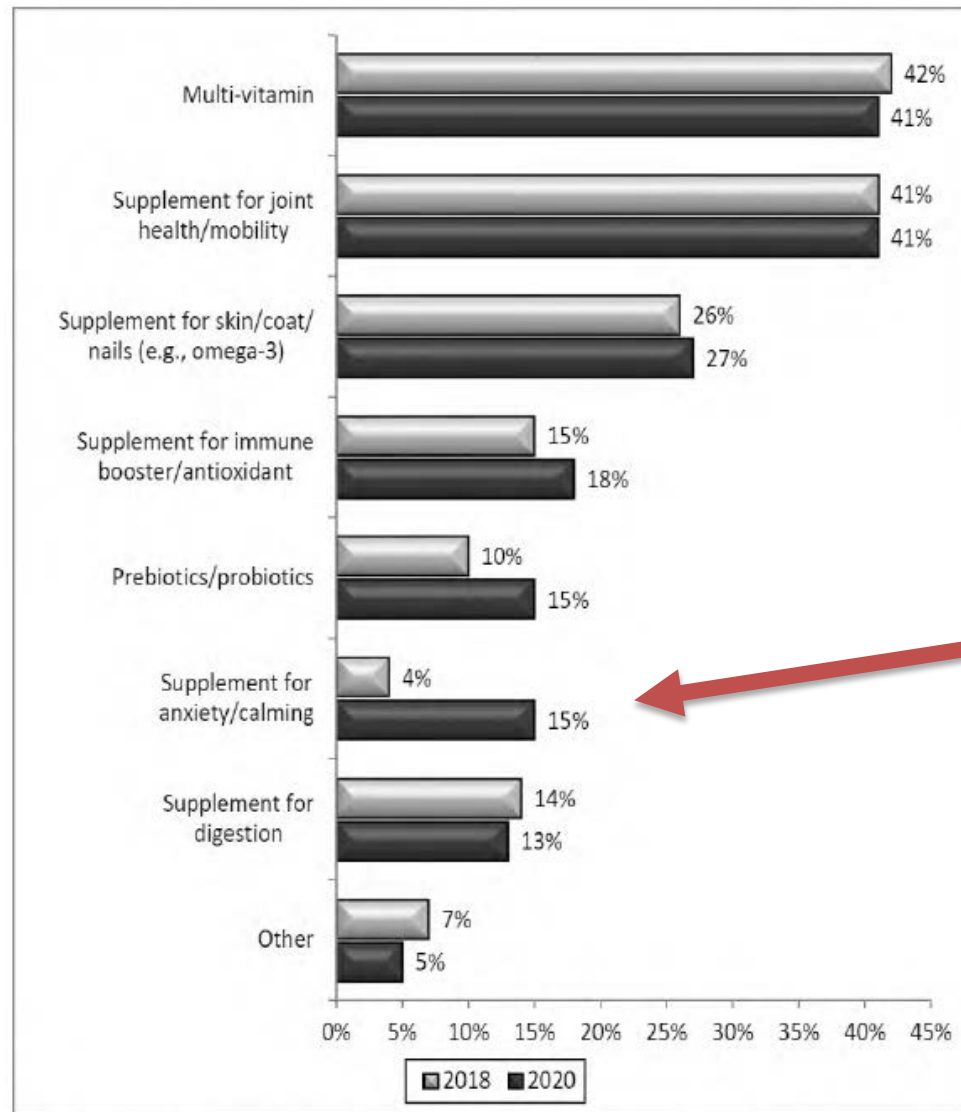
# Ingredients Most Likely Sought After

1. Probiotics
2. Fish Oil
3. Omega 3's
4. Glucosamine
5. Antioxidants
6. CBD





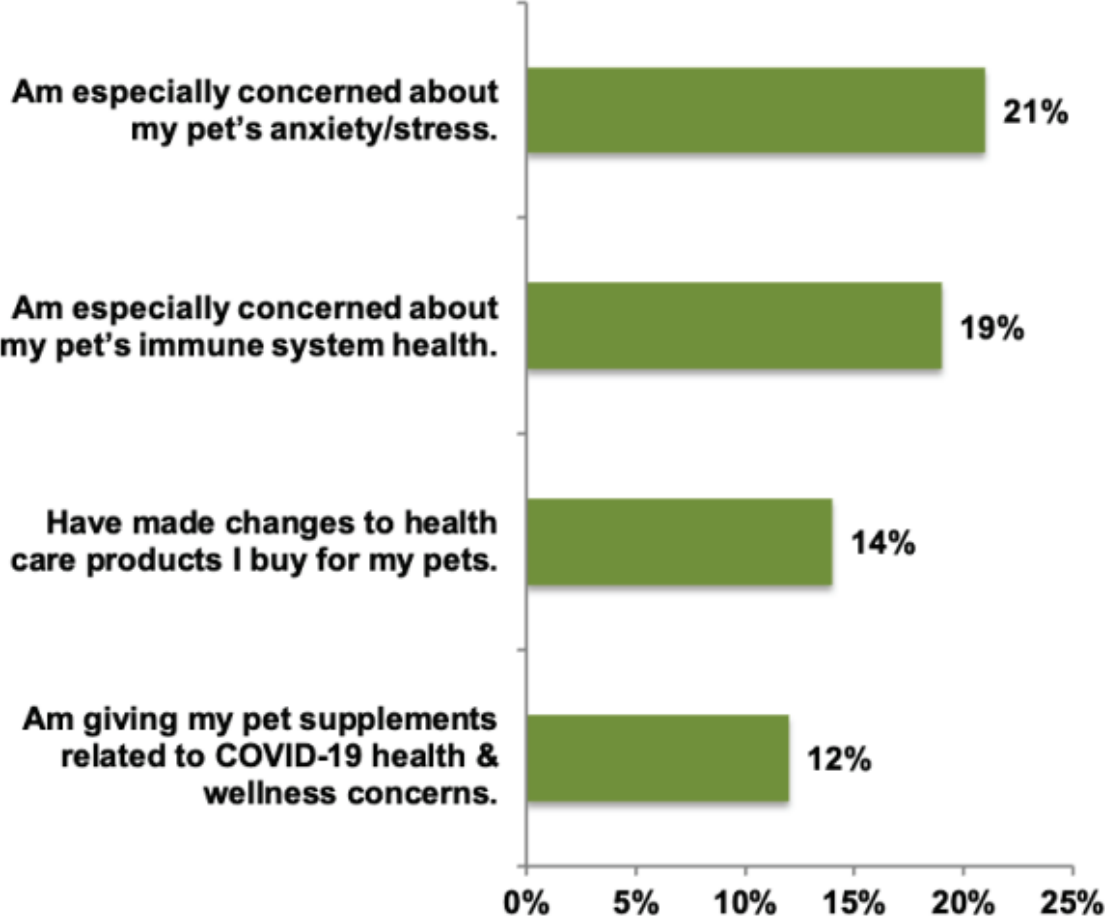
# Health Conditions Evolve



*APPA Pet Owner  
Survey 2021-2022*



# COVID Influences Two Key Conditions



*Packaged Facts Pet Supplements in the US 2021*





# Describe Your Brand

1. Reliable
2. Trustworthy
3. High-quality

Top Brands Share These Themes



# Describe the Supplement Category

1. Safe
2. Natural (made with natural ingredients)
3. Veterinarian recommended





# Describe the Supplement Category

1. Artisanal (small batch)
2. Organic/Non-GMO
3. Money back guarantee



# Parallel Categories



# Treats

1. Price
2. Brand I trust
3. Made in USA
4. Natural
5. Highly digestible
6. Recco'd by vet



# Dog Food

1. Natural ingredients
2. “Less processed”
3. Eco-conscious packaging
4. Organic
5. The idea of insect protein



# Your Key Take Away?





# Sara's Key Take Aways

- Users and non-users share similar beliefs about pet ownership
- Supplement use may start earlier than believed
- New pet owners may be more likely to use supplements
- Specific health conditions are primary reason pet owners seek supplement

