



For the Love of Pets

TREND REPORT BY

ANTONIO
& PARIS

the DATA
that WAGS
the DOG



ANTONIO & PARIS

It should come as a surprise to absolutely no one that people love their pets—sometimes even more than they care for other people. With the rise of pet ownership that occurred during COVID-19 when consumers spent more time at home, plus the trend of more members of the Millennial and Gen Z groups looking to pet ownership in lieu of having children (we know you've all heard the term "fur baby"), it's natural that consumer trends in pet care, entertainment, training, and wellness are growing more prominent across industries.

Brands in the pet industry should look at how human behavioral trends in the market have progressed the past several years to predict how it might affect customers' desires for new pet products, services, and more.

We'll look at several key trends in this report, but the market's demand for innovative animal care options is not limited to just those businesses who already provide pet-related goods.

Let's dive into how pet care brands can shake up their offerings while companies in other industries should consider their consumers' four-legged family members as an opportunity for new revenue streams or a means of building brand loyalty moving into 2025 and beyond.



THE STATISTICS

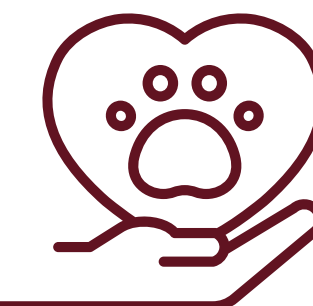
Why have consumer desires trended toward pet-related needs in recent years?

Because
more adults
own pets.

According to the American Pet Products Association (APPA)
(study conducted between 2023 and 2024):

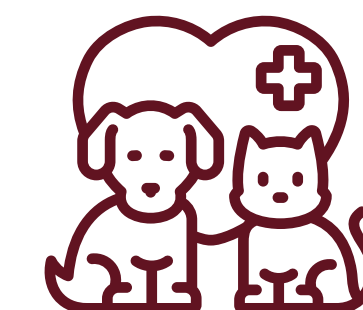
U.S. Pet Ownership Statistics

- **66% of U.S. households** have at least one pet, totaling around **86.9 million households**.
- This is an increase from **56% of households in 1988**.



Pet Ownership by Generation

- **33% of Millennials** are pet owners, according to **Rover Report**, compared to **25% of Gen X consumers**.



Generation Z and Pet Preferences

- **67% of Gen Z respondents** stated they prefer **pet ownership** over human parenting at the moment.
- Gen Z is also the **most likely to spend** on services such as dog walking, doggie daycare, and behavioral training, making them the **most responsible generation** of pet owners.



THE STATISTICS

GENERATIONAL PET OWNERSHIP INSIGHTS

- Gen Z pet owners (ages 18 to 25) **are far more likely than other age groups** to have a variety of pets, according to Forbes Advisor.

In contrast, Gen X pet owners (ages 42 to 57) **are the least likely** to own pets other than cats and dogs, such as hamsters, birds, or fish.

KEY STATISTICS

- **78% of pet owners surveyed by Forbes Advisor** acquired their pets during the pandemic.
- **Americans in rural areas are more likely to own pets and have multiple pets** compared to those in suburban and urban areas.
- **71% of adults in rural areas** have at least one pet.
- **35% of Americans** own more than one pet.
- **According to the American Veterinary Medical Association**, 58% of homeowners have a dog and 36% have a cat, compared to 39% and 29% of renters, respectively.
- 97% of pet owners **consider their pets to be part of their family, says Forbes Advisor.**
- Pew Research Center found that **51% of pet owners say their animals are as much a part of their family as any human member.**

THE STATISTICS

#1 DOGS

65.1 million households

#2 CATS

46.5 million households

#3 FRESHWATER FISH

11.1 million households

#4 SMALL ANIMALS*

6.7 million households

#5 BIRDS

6.1 million households



#1
Still Man's
Best Friend

* SUCH AS HAMSTERS, GERBILS, RABBITS, GUINEA PIGS, CHINCHILLAS, MICE AND FERRETS

Pets
Are
People,
Too.

Pets Are People, Too.

The statistic that nearly all pet owners consider their animals to be part of the family drives us to further explore the pet consumer market.

From *Queen Elizabeth II and her famous corgis* to *Freddie Mercury and his beloved cats*, the deep bond people have with their pets is not a new phenomenon.

However, new products, services, technology, and changing circumstances have made pet ownership more popular than ever.

Treating pets as true family members—in many ways humanizing them—has created an opportunity for brands to target key consumer demographics and grow **market share, loyalty, and revenue.**

According to a University of California study from 2015, there is scientific evidence that people resemble their pets.

Psychologist Michael Roy conducted a study at three dog parks, photographing dogs and their owners separately.

Participants were able to match pets to their owners with reasonable accuracy, and this result has been replicated many times since.



TREND R

Paws for Thought: What Are Pet Owners Really Thinking?

What does all of this tell us about how people shop for and take care of their pets?

What human trends help forecast the next trends in pet care?

How can we use these patterns to help us better predict the actions of pet owners?

How can we look at the pet owner demographic holistically, outside of their pet ownership, and tweak our marketing strategy to better target and speak to them?



Pet owners want products or services that:

- 1. Make their pet's life more comfortable*
- 2. Make owning a pet more convenient or fun*
- 3. Reflect the owners' interests and personalities*



MAIN MENU

Let's look at some of the top industries that can take advantage of these trends:

Lost?

Just click **Bark to Menu (&)** to return to the main menu.



As we delve into each topic in this report,
we'll look at the following:



● KEY STATISTICS

How the industry is adapting to accommodate pet care.

These stats can help brands determine who their target demographics are and how they can relate their own services to pet care to expand brand loyalty, revenue, and market share.

● HUMAN BEHAVIOR

The consumer market as it relates to the industry listed.

This will include trends in the industry based on human consumers outside of pet ownership.

● ANIMAL INSTINCTS

The consumer market with a focus on how it affects the behavior and needs of pet owners specifically.

● INDUSTRY EXAMPLES

Some examples of brands who are already leading the pet care sector for their respective industries and what sets them apart.



Insurance **& Wellness**

Just as human consumers are seeking affordable, reliable options for healthcare and insurance services, more pet owners are looking to ensure that their furry family members are covered with routine care and in the event of an emergency.

KEY STATS

- According to Grandview Research's 2023 Pet Insurance Market Growth Report, **the global pet insurance industry reached \$9.4 billion in 2022 and is expected to grow at a compound annual growth rate of 17.04% through 2030.**
- Only 4.4 million pets were insured in the U.S. and Canada at the end of 2021. **Although this is a 27.7% increase over 2020, it represents a fraction of the 150M+ dogs and cats in these two countries.**
- **Around 80% of insured pets are dogs**, while cats make up the other 20%.
- **Gen Z has been named the generation with the most responsible pet owners** due to having the highest percentage of pet owners with pet insurance plans and the greater likelihood of taking their pets to the vet.
- **41.5% of Gen Z pet owners have pet insurance, and 33.1% are either interested or researching it.**
- **14% of Gen Z pet owners** think pet insurance is too expensive, and **9.4% believe it's unnecessary.**
- In contrast, **less than 3% of Baby Boomer pet owners** have pet insurance. **37.9% believe pet insurance is too expensive**, and 19.8% believe it's unnecessary.



Human Behaviors

Health insurance is a topic of contention among many, especially Americans.

Rising costs, confusing coverage plans, and limited availability to care professionals can make it challenging to choose an insurance provider.

Still, 89.1% of adult Americans had health insurance at some point in 2023, according to the Centers for Disease Control and Prevention, which was a slight increase from 2022.

Healthcare expenditures averaged \$12,555 per person in the U.S. in 2022, says Forbes Advisor.

Mental Health

- **Mental health will continue to be a focus for organizations**, possibly even more so due to the rising rates of employee burnout and the upcoming presidential election.

Flexible Work Arrangements

- **80% of employees consider flexible work arrangements to be a key factor in job satisfaction**, and **61% have left or considered leaving a job due to a lack of flexibility**.

Personality & Flexibility

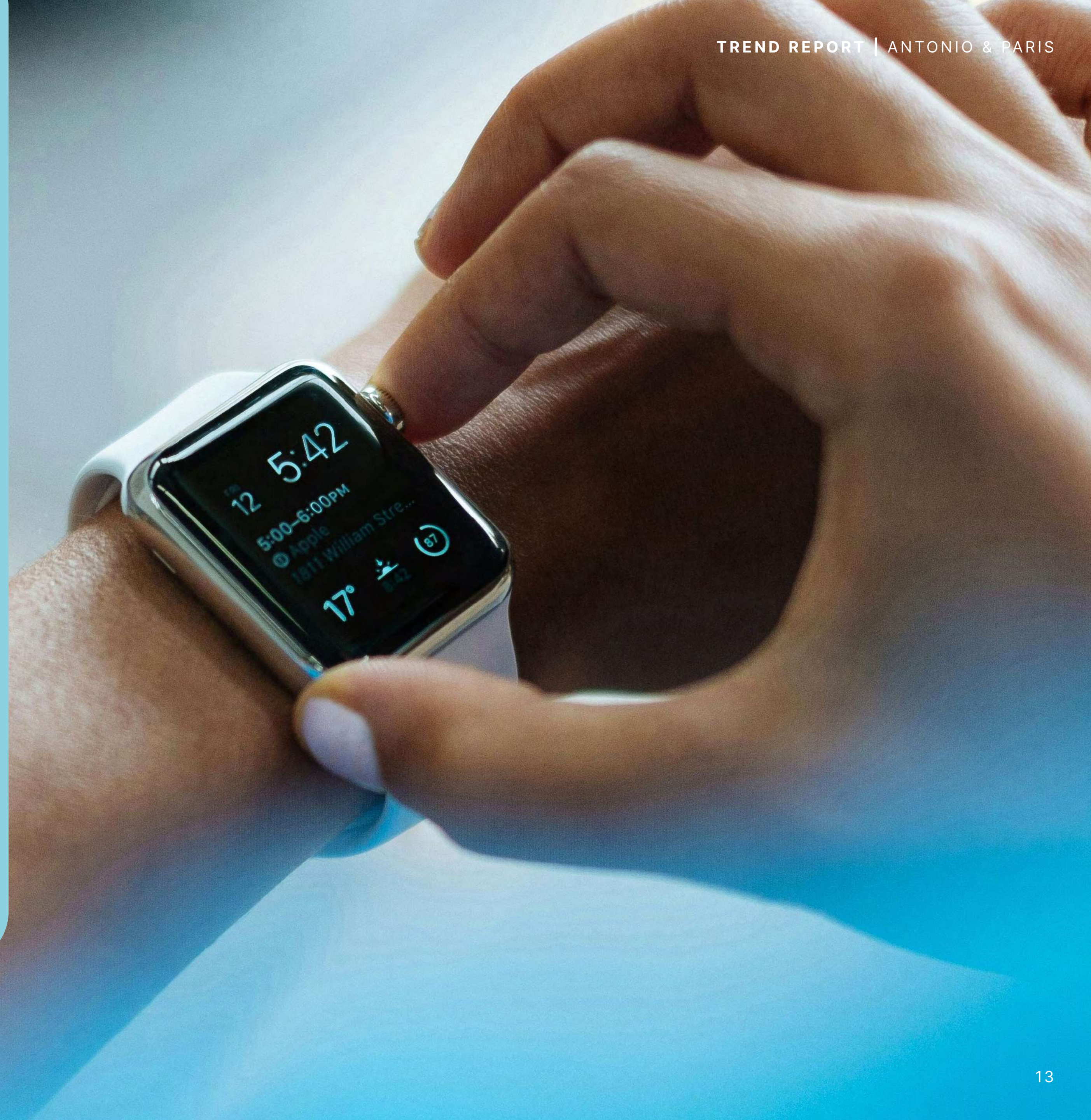
- **The modern workforce is made up of many generations of workers** from different backgrounds, and many employers struggled to find a benefits plan that satisfied everyone in 2023.

Cost & Affordability

- Some issues to watch in 2024 include **prescription drug pricing, virtual care expansion, and state cost control measures**.

Customer Expectations

- Insurers that are able to leverage new technology, customer interactions, and product design innovations will continue to be successful.





Animal Instincts

How pet owners view and plan out their own insurance and healthcare options could easily influence how they choose to take care of their pets. If a consumer feels they're getting a great service through an insurance provider, it's only natural they would look into whether that provider also covers pets—like bundling your home and auto insurance.

Why shouldn't human health insurance providers consider expanding their reach into the realm of pet care, working with veterinarians just as they would partner with doctors' offices?

Pet wellness,
like that of their two-legged counterparts,
has also seen a shift in focus toward
mental health.



Some services and products growing in popularity include:

Pet Therapies

Professionals who provide analysis and treatment/training plans to help pets and their owners achieve a more balanced mental wellbeing, curb bad behaviors, and increase quality of life.

Anxiety Treatments

An increase in products such as calming CBD oils for pets, diffusers, catnip products, etc.

Mental & Physical Support for Cats

Scratching posts and mats for cats.

Stimulating Toys

Play mats, chews, and toys such as the Pupsicle or Kong designed to keep pups busy for longer periods.

The *Snuggle Puppy* stuffed animal with a simulated heartbeat has been a go-to solution for calming anxious pets for over 25 years.

Turning the industry trend in the other direction, Snuggle Puppy HERO is the brand's new product geared toward helping anxious children and adults. The brand has also recently branched out into pet supplements, offering chewable treats designed to promote calmness, gut health, and overall health in dogs.

Pretty Litter is a brand of kitty litter that changes color based on a cat's urine pH levels.

The company, which primarily targets millennial and Gen Z consumers, claims that the product helps cat owners detect illnesses in their cats, such as worms, metabolic acidosis, or a UTI. *Pretty Litter* is also noteworthy because, unlike nearly every other kitty litter on the market, it is sold exclusively via a monthly subscription rather than in stores or through most third-party online retailers like Amazon.

It is available through Chewy.com.

Food Products & Supplements

With more access to educational materials and different nutrition items thanks to online shopping, increased in-store variety, and more specialty store options, many people are more conscious than ever about what they eat.

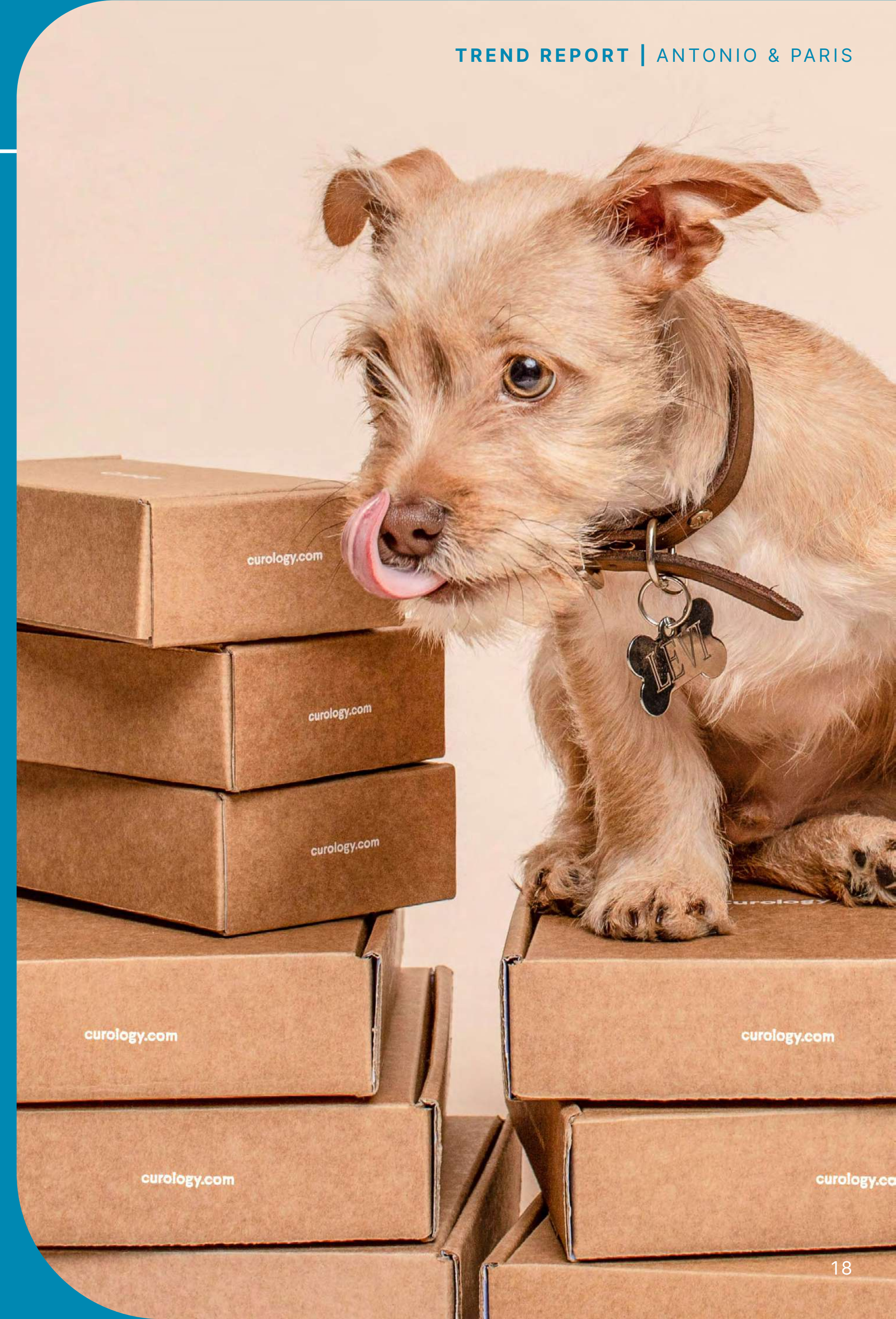
It's no surprise that pet owners are becoming increasingly choosy about what they feed their animals, hoping to increase the quality and length of life for their beloved pets.



KEY STATS



- According to a study by Scandiweb, in 2022, the pet food industry was valued at \$136 billion and is projected to expand to \$224 billion by 2027, with a compound annual growth rate (CAGR) of 11.1% from 2023 to 2027. This growth is driven by increasing pet ownership and evolving consumer preferences.
- The COVID-19 pandemic accelerated the shift toward digital platforms within the pet food sector. Both Millennial and Baby Boomer pet owners have increasingly turned to online shopping for pet food, driven by the convenience and safety of eCommerce.
- Dogs dominate the market, particularly influencing the demand for dry food, which accounts for nearly 45% of the market due to its dental benefits for pets.
- The online pet food market is characterized by intense competition and rapid innovation, including trends such as loyalty programs, affiliate marketing, mobile commerce, social shopping, live streaming, and subscription services.
- PetFoodIndustry.com reports that sales for "non-traditional pet food formats" (like freeze-dried) are growing faster than traditional pet food.
- According to a survey conducted by the University of Guelph Ontario Veterinary College, 66% of dog owners and 53% of cat owners feed their pets raw food.
- A survey of 2,181 pet owners discovered that 43.6% prioritize the health of their pet's food over their own.





Human *Behaviors*

What's trending in the gastronomic industry could help pet food brands predict the next big thing people want for their dogs, cats, and other animals.

For example, will the Millennial desire for lab-grown meat products translate to them looking for that product as a desired ingredient in pet food?

As food brands and restaurants lean into nostalgia that appeals to Millennial and Gen Z generations, does it mean we'll see pet-friendly Dunkaroos, Pop-Tarts, or Goldfish crackers?

According to Innova Market Insights, here are some of the top food trends of 2024



Ingredients Taking the Spotlight

Global research shows a growing interest in ingredients, with 1 in 3 consumers checking product labels. Protein is the most important ingredient for 42% of consumers.

Nurturing Nature

Consumers expect companies to protect nature beyond sustainability. There's been a 37% increase in food and beverage products with forest protection claims and a 40% rise in water-usage claims (2020-2023).

Prioritizing Prevention

Consumers are proactive about health, focusing on weight management, heart health, and bone/joint health. Products like Beeza Peanut Butter cater to these needs, with 1 in 3 consumers focusing on weight management and a balanced diet for healthy aging.

Plant-Based

Plant-based products are gaining traction, becoming more familiar and accessible in everyday dishes.

Oceans of Possibilities

The sea is emerging as a sustainable food source, with ingredients like kelp and spirulina growing in popularity. New launches featuring microalgae have increased by 42% (2020-2023).

Quenching the Future

Hydration-focused soft drinks and sports nutrition products are seeing increased interest, with launches up 10% over three years.

Minimizing the Noise

Consumers desire simpler, clearer communication amidst the overwhelming number of claims and labels.

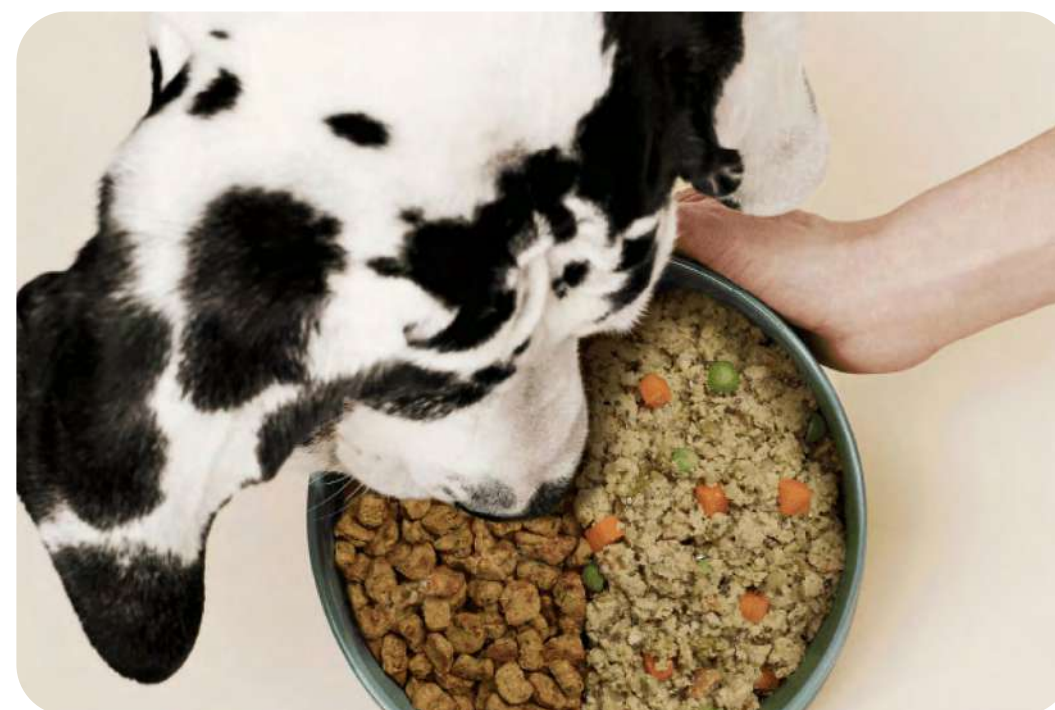
Animal Instincts

As health consciousness takes firmer root in the minds of consumers, they are more likely to translate their own desire for overall wellbeing and longevity to that of their pets.

Pet food brands should look to rising trends in other food products when expanding or enhancing their offerings. Brands promoting treats should consider the “fun” factor that rising nostalgia for childhood snack foods has by creating pet-friendly versions that would appeal to Millennial and Gen Z consumers who want to share their favorite snacks with their pets.

We all know Starbucks lovers can't wait to grab that “pup cup” in the drive-thru! Some of the above trends we see being embraced already include:

- A rise in dog food brands using salmon or whitefish in dry kibble, wet food, and prepared meals, where seafood was once primarily a cat food ingredient.
- Increased demand for human-grade pet foods and fresh pet food options.
- More foods and treats for pets with added health benefits, such as supplements for joint, gut, and dental health.
- Simplified ingredients and fewer preservatives.
- Separate supplements, such as daily vitamins, available for pets.





Industry Examples

- The Farmer's Dog, the hottest name in dog food right now, tackles all the needs of the modern dog owner. It's doctor-approved, with a vet-designed plan customized to your dog's individual needs. Meals are pre-made and pre-portioned to their calorie needs based on the profile you create and made from healthy, high-quality food adhering to the same standards as human food. The food is made fresh and quickly frozen to lock in all the nutrients, conveniently packaged for easy single servings. The Farmer's Dog's 2023 revenue was around \$24 million.
- A well-known leader in pet food, Nestlé Purina PetCare has expanded its offerings with a range of supplements in addition to its popular food brands. Purina Pro Plan Veterinary Supplements recently launched Joint Care, a new soft chewable supplement that supports mobility, health cartilage, and joints in dogs and puppies of all breeds. It also has chews and tablets for dogs and cats promoting hydration, overall wellness, calm, and gut health.



Grooming

People are obsessed with their skincare routines, so why would they feel any differently about how they take care of their dog's skin, coat, nails, and teeth?

A rise in dog owners' desire for designer cross-breeds, such as variations of poodle mixes—affectionately known as "**doodles**"—also means more dogs that require regular grooming and maintenance to prevent matted fur, ear infections, and other issues.



KEY STATS



Pet owners worldwide **spent \$4.13 billion** on skin- and coat-care products in 2022,

a number that is expected to grow by nearly 10% in the next decade.



According to a Dogster.com 2024 survey:

- 84% of pet owners groom their dogs at least once a year.
- 41% of owners groom their dogs at home, 30% take their pets to a grooming salon, and 9% use mobile grooming services.
- The U.S. holds 56% of the global pet grooming market.
- Two-thirds of pet owners understand that regular grooming contributes to a healthier pet.
- The global pet grooming market is valued at over \$1.3 billion annually.
- The mobile pet care market is valued at just over \$0.5 billion annually.
- The pet grooming industry is projected to reach an annual revenue of \$2.5 billion by 2032.

Human *Behaviors*

The range of skin, hair, and other body-care products has grown exponentially in the past few decades, with retailers like ULTA and Sephora growing into household names.

The TikTok generation especially loves “*get ready with me*” videos, where users chat while going through their daily routine or getting ready for a special event. Some of these rack up millions of audience members.



So how can pet care brands track trends in human grooming and beauty care and translate them successfully to pet products or services?



Continued Emphasis on Natural and Organic Ingredients

According to the Environmental Working Group, the average person applies nine personal care products to their body daily. More than 65% of consumers are looking for environmentally friendly brands, and 55% are willing to pay more for sustainable products. A recent report from Nosto said that 68% of people are looking for products described as “clean” and 59% of people are influenced by products that are described as “natural and organic”.

Hyper-Personalization with AI and AR

Research from McKinsey shows that 71% of today’s consumers expect to receive a personalized experience when they shop. Nearly 80% of consumers are more likely to make repeat purchases from a company and recommend that company to a friend or family member if the company provides a personalized experience. More specifically relating to the beauty industry, 58% of shoppers say they are more likely to buy from a business that offers an online quiz to recommend specific beauty products for them.

Biotech & Sustainability

Most often, it’s not sustainable to grow beauty ingredients on a large scale. However, the biotech movement is prompting researchers to find beauty ingredients that already exist in organisms in nature. Then they are able to replicate that natural process and mass produce ingredients in a lab.

Beauty Sales and Brand Engagement on TikTok and Instagram

Nearly half of all social media users will make at least one purchase on a social platform this year, and beauty products are one of the top things they buy directly on social media, second only to clothing. Nearly 60% of users have made a beauty purchase after seeing the product on social media and, specifically, 89% of TikTok users have made a beauty purchase after seeing a product on the platform.

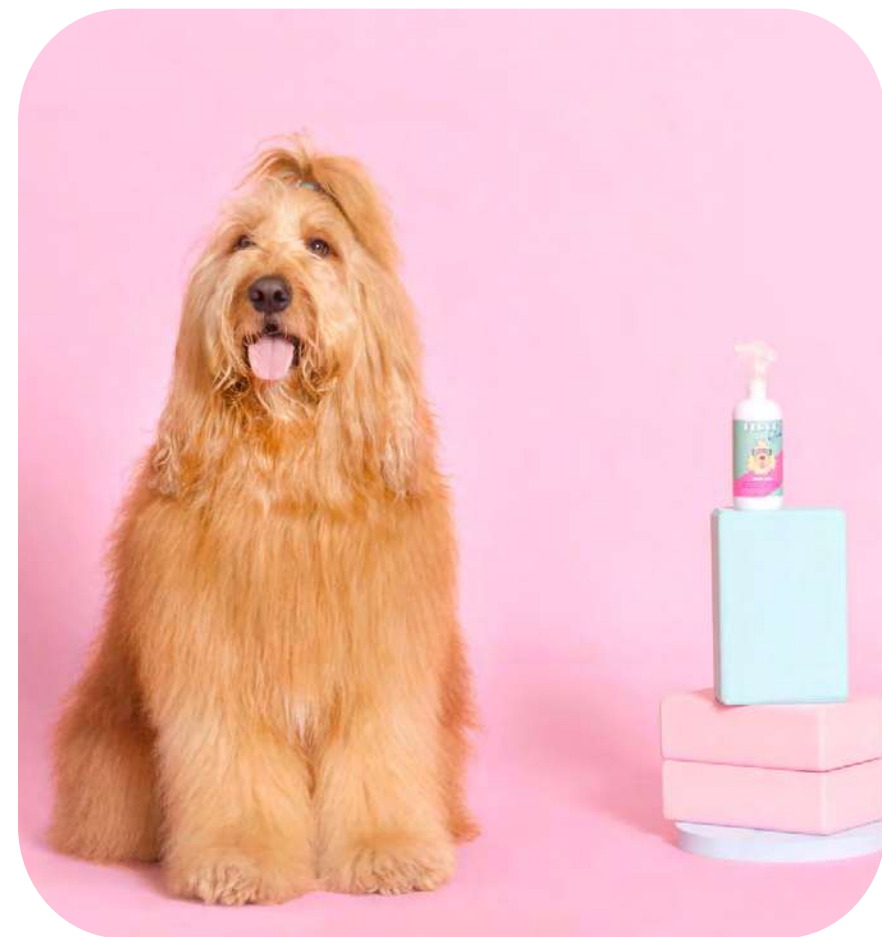
Top beauty industry trends of 2024, according to Exploding Topics

Animal Instincts

- Many clinics and “wellness centers” offer preventative care: nail trims, vaccinations, dental care, blood panels, and annual exams.
- Pet wipes: Pet wipes are essentially moist towelettes used on pets after going to the bathroom. Although a relatively new category, Amazon already has nearly 300 brands of pet wipes for sale.
- Want your dog to smell like your favorite products? Look no further than OUAÏ, Aesop, and Kiehl’s, each of which offer products formulated specifically for poodles.
- Groomers are taking to the streets with mobile services becoming more available and more popular, providing a more personal touch and one-on-one client interaction as opposed to owners dropping their pets off at the groomer.



Industry *Examples*



Cleo&Hooman, a new luxury pet care brand, offers premium grooming products specifically formulated for pets with allergies and sensitive skin, including Zoomie Wipes, Bark Butter, and a range of shampoos infused with nourishing ingredients.

For doodle owners and others with dogs needing hair care, **Floof by Brodie** introduced Floof Juice, a dry shampoo that keeps fur fresh without a full bath. The brand effectively targets social media with Instagram ads geared toward golden retriever and doodle owners.

Some renowned pet spas worldwide include:

- The Barkley Pet Hotel in Los Angeles, California
- The Pet Spa in London, UK
- Posh Pet Hotel in Palm Beach, Florida
- Dogs in the City in Paris, France
- The Country Dog Hotel in Somerset, United Kingdom
- D Pet Hotels in Scottsdale, Arizona
- Critterati in Gurugram, India
- Chateau Poochie in Pompano Beach, Florida
- The Wagington in Singapore
- Urban Mutts in London, UK.

A golden retriever dog is shown in profile, sitting in a car seat and looking out a window. The dog's fur is a mix of golden and white. The window shows a blurred outdoor scene. The car's interior is dark grey with a perforated texture.

Transportation

People have to get around, and so do their pets, especially those that are service animals and ones that are considered core members of the family.

With pet ownership on the rise and travel surging back to healthy levels post-pandemic, a new range of pet-friendly transportation services has also emerged.

As humans are looking for affordable, convenient public transit or personal vehicles that suit their lifestyle, those with pets will keep furry friends in mind when making those choices.

KEY STATS

According to Yahoo Finance, with a compound annual growth rate of approximately 9.6%, **the pet travel industry is estimated to be worth around \$3.73 billion by 2030.**



- **Fivebarks**, a participant in the Amazon Services LLC Associates Program, reports that around 85% of U.S. dog owners use cars as their primary mode of transportation when traveling with their dogs, followed by 10.8% who travel by plane.
- Additionally, Fivebarks notes that around 79% of Americans travel with their dogs for vacation, while 11.3% travel with them for relocation purposes.
- Data from the U.S. Department of Transportation and the International Pet and Animal Transportation Association reveals that **over 4 million pets and other live animals are transported by air each year worldwide.** Less than 0.01% of pets that travel by air experience any incidents, a number expected to increase in 2024 and 2025 due to rising pet ownership.
- Yahoo Finance also highlights that in 2023, dogs led the pet travel market by pet type, generating the largest revenue share at over 59%. According to a survey of U.S. pet parents, **about 61% of dogs enjoy traveling the country with their owners.**

Human Behavior

Travel trends can be predicted by different market demands across industries. For example, the 2024 Summer Olympics in Paris has influenced a spike in Parisian and French travel even among those visiting before or after the Games.

The consumer desire to follow and support sustainable practices can be used to predict a rise in travel to wellness-focused and eco-friendly destinations.

Car buyers are also more apt to consider greener vehicles and to drive for a vacation if they're the type of people who put corporate social responsibility on their radar.



Virtuoso Travel Week Insights

Women's Trips

Cruise lines and tour operators, such as Butterfield & Robinson, Insight Vacations, and UK-based Wilderness Group, are increasingly organizing women's trips. Notably, Natural Habitat Adventures' Women in the Wild trips offer departures focused on female explorers, from bear spotting in Alaska to Icelandic circuits. Uniworld Boutique River Cruises is even planning a women-only cruise in 2026.

Conservation Efforts

Travel providers are embracing projects that reconnect people with nature and aim to restore natural habitats. Examples include WildChina's rehabilitation of the Tea Horse Road and the Arabian Leopard Fund's massive rewilding initiative in the 580-square-mile Sharaan Nature Reserve.

Community-Based Tourism

Ensuring local communities benefit as much as visitors is becoming a focus. In Peru, Virtuoso's on-site connections work closely with local governments to ensure that communities in the Sacred Valley and Lake Titicaca actively participate in tourism planning and benefit from it.

Wellness Retreats with Specific Goals

Travelers are seeking hyper-targeted wellness solutions. Properties such as Equinox Hotel New York offer sleep programs, while The Taj Mahal Palace in Mumbai focuses on gut biome care. Carillon Miami Wellness Resort features an AI-powered mattress, and MEA Wisdom offers a midlife wellness program.

Longer Stays in Fewer Destinations

Travelers now prefer spending more time in fewer destinations, seeking deeper connections with places. Virtuoso advisor Carolyn Addison notes that while trip lengths remain the same, the number of destinations visited has decreased. Regent Seven Seas Cruises is addressing this with more overnight stays, and Royal Caribbean is even offering a nine-month Ultimate World Cruise.

Top travel
trends of 2024
and **beyond**

Animal *Instincts*

Top Travel Destinations

According to GlobalVetLink, the top international destinations for travelers with pets in July 2024 were France, Germany, Canada, Spain, and Mexico. Domestically, the most popular U.S. destinations include Colorado, Texas, California, New York, and Florida.

Travel Safety Products for Pets

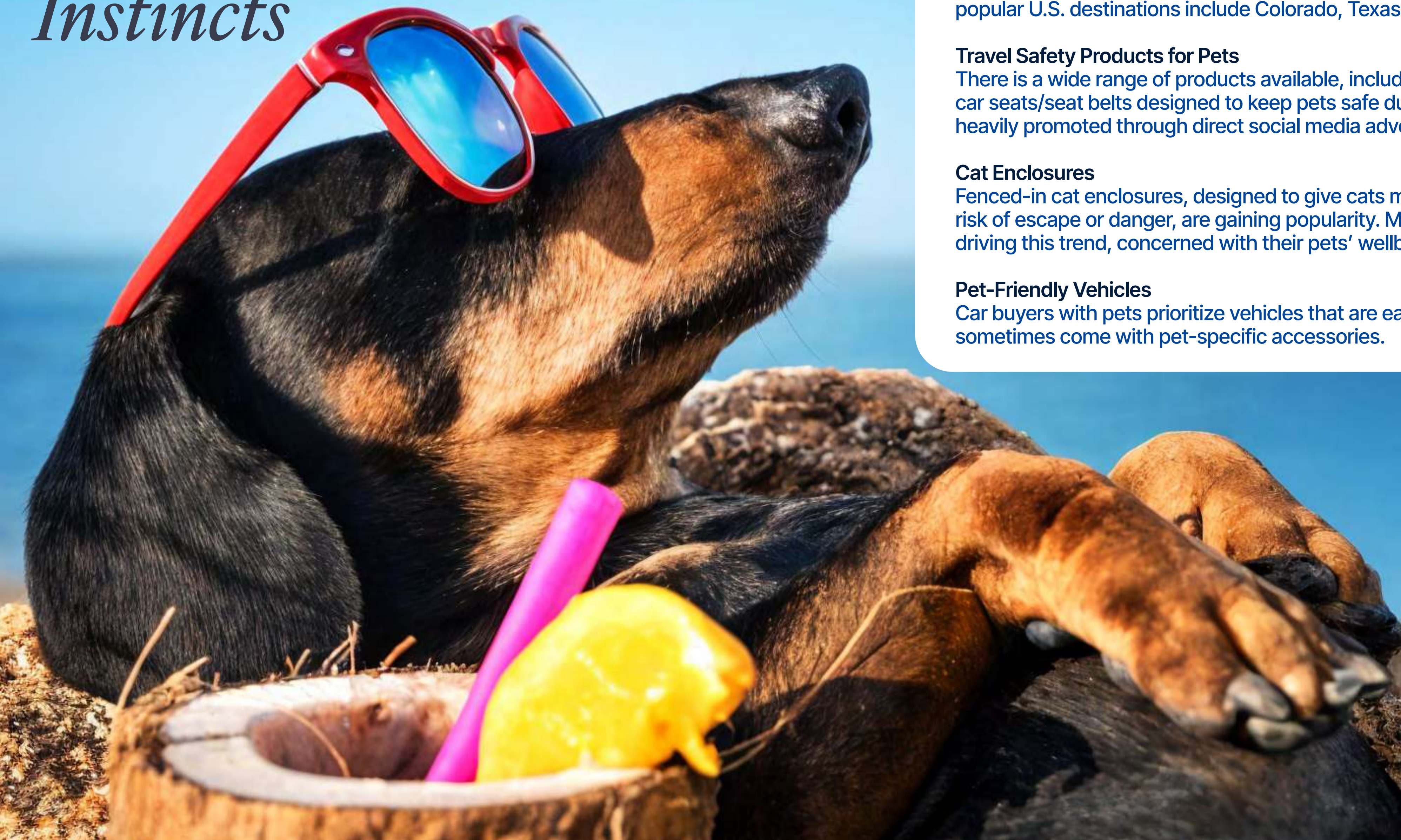
There is a wide range of products available, including leashes, harnesses, carriers, and car seats/seat belts designed to keep pets safe during travel. Many of these products are heavily promoted through direct social media advertising.

Cat Enclosures

Fenced-in cat enclosures, designed to give cats more outdoor time while minimizing the risk of escape or danger, are gaining popularity. Millennials and Gen Z, in particular, are driving this trend, concerned with their pets' wellbeing both at home and during travel.

Pet-Friendly Vehicles

Car buyers with pets prioritize vehicles that are easy to load, easy to clean, and sometimes come with pet-specific accessories.



Industry Examples

Uber Pet launched in spring/summer 2024 in the US and UK and continues to roll out in other locations, allowing riders to select a pet-friendly ride even if their dog or cat is not a registered service animal (those have always been welcome in Ubers).

When a rider requests an Uber Pet trip, they agree to pay a little extra for their ride, which means the driver earns more per trip than they would driving UberX on the same route.

From the makers of the top toy-and-treat-focused subscription box for dogs, BarkBox, now comes BARK Air.

It launched in April 2024 as the first airline specifically created with a “dogs fly first” philosophy. Offering chartered flights between New York, Los Angeles, Paris, and London, the airline plans to expand to more destinations that are difficult to drive between, especially with a dog. “Listening to dog people and giving them more ways to spoil their dogs is what drives every business decision we make as we further our mission to make all dogs happy, and it will be no different for the next phase of BARK Air,” says the company.

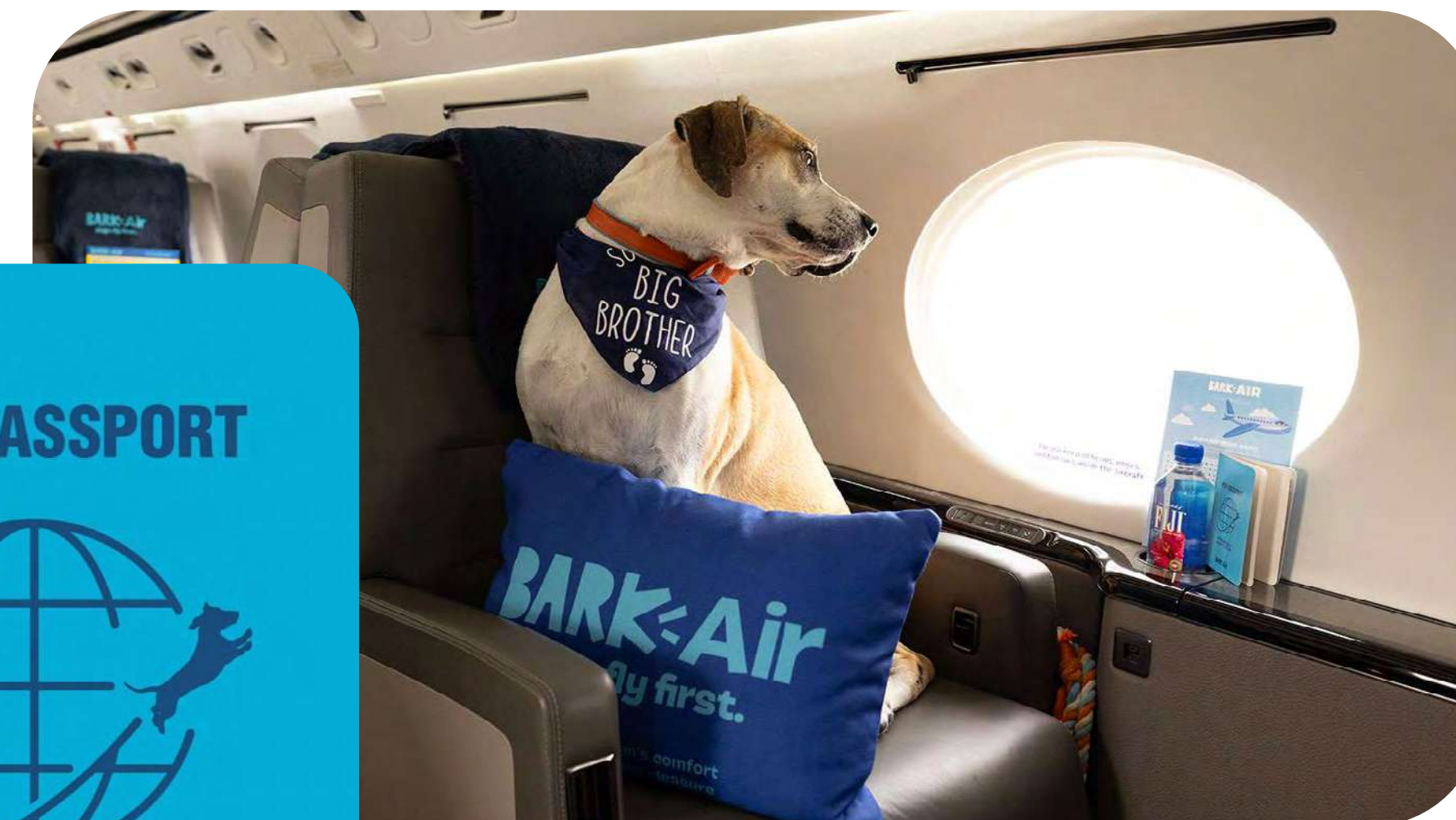
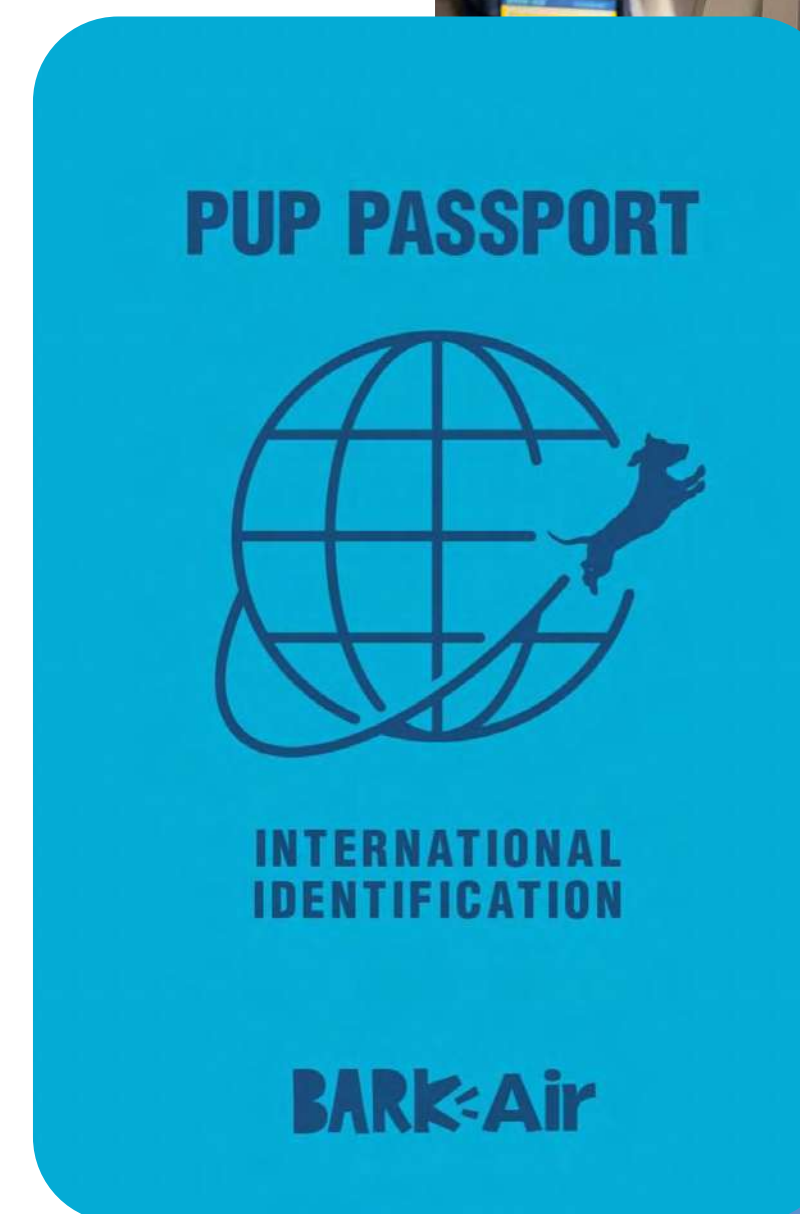
To promote its launch and mission of comfort and luxury for all passenger pooches, BARK Air even had CEO Matt Meeker ride from South Florida to NYC in a dog crate in the cargo hold of a commercial plane to share how terrible the experience was.

Starwood Pet Travel is the highest-rated pet relocation service in the US, helping pet owners move or travel over long distances with their pets by providing personalized concierge for relocation, door-to-door transport, and more.

Services include transportation to or from Hawaii, pet importation into the United States, and all-encompassing door-to-door international air transport from the US to many countries across the globe.

“There’s a lot of overlap between dog people and Subaru people,” says a 2024 U.S. News report of the Best Cars for Dogs. Subaru even plans entire marketing campaigns around this slice of the Venn diagram. Subaru also partners with animal shelters at auto shows to help get puppies into loving homes.

While almost all Subaru vehicles are dog-friendly (we’d skip the BRZ coupe for this purpose), the Outback is considered one of the best in the brand’s lineup, and in general.





Technology & Wearables

We all know that coworker who was obsessed with “getting their steps in” with tracking via the FitBit and now is the one who must “close their rings” each day on their Apple Watch.

Today’s wearable tech provides people with everything from fitness tracking and GPS to health monitoring, social connections, virtual reality, and so much more. A natural progression in the industry was creating wearable tech products for pets to promote their safety and provide vital data.

KEY STATS

- According to Global Market Insights, the Pet Tech Market was valued at \$10.5 billion in 2023 and is estimated to register a CAGR of over 13.5% between 2024 and 2032.
- The pet tech market is categorized into pet healthcare, petowner convenience, communication and entertainment, and pet safety.
- In February 2024, the U.S. FDA released guidelines for data security in pet health monitoring devices, ensuring manufacturers develop secure products without stifling innovation.
- North America holds a significant share, accounting for over 57% of the market in 2023, driven by high pet ownership rates and advanced technology adoption.
- In May 2023, the American Pet Products Association reported a significant increase in spending on pet tech products, reaching \$3.7 billion, driven by smart collars and health monitoring devices.
- Asia-Pacific is one of the fastest-growing regions. In February 2024, the Japan Pet Food Association reported a 20% increase in sales of smart pet care devices, indicating a growing acceptance and demand among Japanese pet owners.



**UNDERSTANDING
YOUR 'WOOF'**

Human Behavior



Fitness monitoring may have been one of the key factors in humans' wearable technology trends, but that is quickly expanding as more consumers adopt products for daily health monitoring, mobile apps to track wellness and progress, and a bevy of services or other tech-related products to make life easier.

We order groceries and food delivery, track the mail, have doctor and therapist visits, and entertain ourselves on our mobile devices more often than not.

Monitoring our pets and using tech to help with their care is a natural step for all pet parents.

Animal Instincts



- Pet owners are becoming more informed about their companions' health needs, driving demand for pet tech products that monitor activity, track vitals, and offer remote veterinary consultations.
- Pet wearables are a growing market. The desire to know where your pet is and have peace of mind about their health is strong. Tech isn't cheap, but people are getting closer with their pets and are willing to spend money to ensure their wellbeing.
- GPS trackers are the most popular type of wearable tech for pets, particularly dogs and cats. But many of them are not reliable or have a short battery life. Others, such as the Tile, rely on phones to triangulate location. If no phone is around, it does not work.
- Training collars and invisible fences were some of the first wearable tech products for pets, and have come a long way while remaining popular for behavioral correction and safety.
- Health monitoring collars can track biometrics. They are becoming popular with epileptic pets and can provide predictive diagnostics.
- Mobile apps for pet care are also increasing in popularity. Everything from vet scheduling to digital pharmacies, medicine tracking, training, calmness, and more can be downloaded at pet owners' fingertips.
- Cameras geared toward monitoring pets act as a "baby monitor" when pet owners are not at home or in the same area as their pets. Most of these connect to a mobile app where owners can monitor and sometimes interact with pets in real-time.
- Smart feeders and treat dispensers are also becoming more common for pets whose owners are away. Global Market Insights shares PetSafe's March 2024 launch of an AI-driven smart feeder that adjusts feeding schedules based on pets' eating habits and health data. By adjusting feeding schedules based on a pet's needs, the AI feeder can help with weight management.



Industry Examples

- The newly launched Fi Series 3 Smart Collar claims to offer more features than any other smart collar, “speaking dog so you don’t have to.” With live GPS tracking, escape alerts, activity monitoring, vet sharing, sleep tracking, behavioral insights, and ways to connect with your pet-loving community, this collar is one of the most advanced in wearable tech for pets.
- In October 2023, PetPace announced the launch of its next-generation Health 2.0 smart dog collar, which offers features such as early symptom detection, location tracking, disease management, and continuous health monitoring. PetPace’s AI-powered life-saving technology enables pet owners of sick, at-risk, or old pets with medical insights that often go overlooked.
- The company’s Health 2.0 measures all major vital signs and health-related biometrics, including heart rate variability (HRV), activity, posture, sleep quality, pulse, behavior, respiratory rate, and internal temperature. Additional features include a wellness index, health profile, pain indicator, and workout intensity assessment.
- PetPace also partnered with Veterinary Health Research Centers in November 2023 to research Canine Alzheimer’s Disease. The initiative has been named Dogs Overcoming Geriatric Memory and Aging (DOGMA).
- Woofz training app is a full-service mobile app for dog training, designed to help new puppy owners settle into their role as pet parents and help their new fur baby find its place in the household with confidence and comfort. The app includes tips, training modules, quizzes, videos, and even the option to speak with a certified trainer.
- As pet owners and their dogs progress with learning positive behaviors and how to prevent negative ones, their dog’s avatar journeys further along the map inside the app, and the training modules move on to more in-depth educational tools.



Care Services

We've already established that pets are seen by most owners as part of the family, even as important as its human members in some cases.

Pet care services are nothing new—dedicated dog walkers have long been parading the sidewalks and impressing others with their ability to handle a handful of pets at once, and boarding facilities are important service providers for when pet owners can't take their animals out of town with them.

But just as human childcare has become more hands-on with parents, pet care services are offering more options.



KEY STATS

- The global pet boarding market is worth approximately \$20 billion and will grow to \$36 billion by 2031.
- The pet daycare market is worth an estimated \$3.7 billion a year in the US.
- Pet sitters reported a more than 50% decline in business during the pandemic.
- Doggy daycare costs an average of \$35 per day.
- Dog boarding costs an average of \$40 per night.
- There are more than 20,000 pet care facilities in the US.
- There are 35,000 pet sitters in the US.
- There are 9,000 boarding kennels across the US and Canada.
- Daycare accounts for about 40% of the pet-sitting market.
- 22% of owners use dog walking services and 27% use daycare.
- Cats and dogs are the pet species accommodated by most pet-sitting services.
- The pet daycare market is forecasted to rise 8% per annum until 2032.
- More than three-quarters of professional pet sitters expect an increase in business in the next year.
- 64% of owners said they would spend more time with their pets after the pandemic.

A beagle dog on a leash looking up at a person's leg in a park setting. The dog is white with brown patches and is wearing a red collar. The person is wearing blue jeans and a black boot. The background is a blurred park with fallen leaves.

Human Behavior

Today it's not good enough to hire a sitter or choose a daycare for your child based on a positive recommendation or interview.

The industry is competitive, with more daycares offering introductory education and programming for young minds.

Costs are steadily climbing for quality childcare. Sitters are expected to come with multiple references and be backed by certifications and trusted services.

Parents want to know where their child is, what they are doing, and their emotional status in real-time via tools like video monitoring, apps, and social media. The same could be said for many discerning pet owners.



- As pet owners embrace an increasing trend of humanizing their animals, the desire for full-time pet care will increase as opposed to owners leaving their pets home unsupervised.
- Daycare facilities for dogs are popular options for busy working pet parents, providing dogs with important socialization and exercise throughout the day and week that they would not get if they were home alone.
- Many doggie daycares also offer training and other services to help improve dogs' overall wellness and quality of life.
- Upscale boarding facilities and "spas" for dogs and cats offer everything from TV time to enrichment, nail and grooming services, and more for pampered pets.
- Pet owners are increasingly involved and aware of their pets' activities throughout the day at care facilities thanks to social media and photos or videos through mobile apps or provided by the staff.
- Video monitors with coordinating mobile apps allow pet owners to see their pets when they are home alone. Many offer features to talk to pets or even give them a treat via a smart dispenser.

There's nothing like going all out for your kid's—or your pet's—birthday. Pet party planning kits are available on Amazon and from other retailers, like Okra & Molly, which started as a bakery specializing in dog birthday cakes and expanded from there.

This pawty-planning helper has everything from decorations to pet-friendly cakes, treats, and presents so pet parents can celebrate their fur-baby's big day with ease (and cuteness).

With nearly 30k followers on Instagram, Okra & Molly is growing market share by capitalizing on all their adorable cake designs and happy four-legged customers.

Tavo Pets has rivaled the top children's car seat brands with its innovative and lab impact-tested car seat design for pets.

The Maeve car seat by Tavo comes with a secure locking base, has been front- and side-impact tested, and meets industry safety requirements for child safety seats. Like most infant car seats, the Maeve carrier also comes off the base for portability, and Tavo designed a stroller mount called Roscoe that is also compatible with it.

Did we mention the bundle for both starts at \$900 for the smallest size?

It's proof that people are taking their pets' safety very seriously and are willing to pay premium pricing for the peace of mind and convenience a product like this can offer.

Baby monitors and nanny cams are next-level with today's tech, and that consumer desire translates to a product that can help monitor pets when they're home alone. CNN listed the Furbo 360° Dog Camera and Treat Dispenser as the best "splurge" pet camera for 2024. At \$210 on Amazon, it features a rotating base for maximum room coverage, an interactive treat tosser, and a user-friendly app.

The Furbo 360° provides the most functionality out of all the cameras tested in CNN's roundup.

Luxury Goods

People love their designer clothes, beauty and skincare products, and experiences.

From illustrious fashion houses like Gucci and Tiffany & Co. to top-tier luxury bath and beauty products, high-income consumers appreciate brand recognition and indulgence.

Are you surprised they would want the same for their pets?

Believe us, the luxe brands deliver.

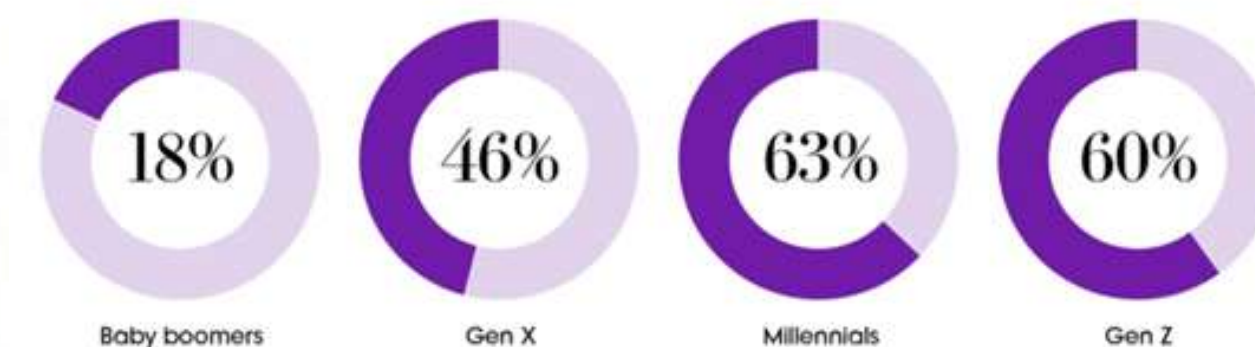
KEY STATS

- The Global Luxury Pet Accessories Market is expected to be worth around \$6.3 billion by 2032, up from \$3.8 billion in 2022, growing at a CAGR of 5.30% during the forecast period, according to Market.us.
- 7 out of 10 pet owners are open to investing more in luxurious items for their pets than they would for themselves.
- Based on product type, the global luxury pet accessories market is classified into apparel, collars, harnesses, and leashes, beds and furniture, toys, feeding accessories, grooming products, and other.
- North America is the largest market for luxury pet accessories, accounting for a 35% share in 2022 of the global market, and is expected to remain dominant during the forecast period.
- Valued at \$1.44 billion in 2024, the pet perfume market is expected to reach \$2.26 billion by 2034, according to research from Quince Markets Insights.



Spend from younger consumers is growing 3x faster than other generations

Percentage of shoppers who bought luxury in the past 12 months



*ATA SOURCE: RAKUTEN AND VOGUE BUSINESS SURVEY OF VOGUE AND GQ READERS

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Human Behavior



“To be a lifestyle brand, you have the good fortune and opportunity to play in these adjacent spaces, and that’s what we’re doing here,” said True Religion CMO Kristen D’Arcy in 2023.

True Religion’s new collection features everything from harnesses to cold-weather accessories.

Denim, a staple of True Religion’s products, is woven into some of the items, including bedding and leashes.

“What consumers have come to love about the brand is our attention to detail.”

All of those elements... you will see translated into the product line for pets.”



Animal *Instincts*



- The global luxury pet accessories market is becoming increasingly competitive due to the entry of new key companies. Leading players in the market are focusing on product innovation to meet rising consumer needs.
- Brand recognition is important for pet owners who seek luxury goods from their favorite designers, allowing their dog, cat, or other pet to match their personal style.
- Celebrity pets and pet influencers could play a significant role in driving this market across social media and online retailers.
- Some of the top global luxury fashion brands with pet products include Gucci, Prada, Versace, Dolce & Gabbana, Louis Vuitton, Fendi, Miu Miu, Hermès, Moncler, Christian Louboutin, Thom Browne, Saint Laurent, and Tiffany & Co.

We couldn't choose, so for this entry,
*enjoy a small luxury pet shopping guide fit for
a royal pooch or feline:*

Key Takeaways

How can we take data about pet owners and apply them to your marketing strategy?

- Does your brand have an opportunity to extend your product or service line to pet care?
- Owners see themselves in their pets. How can we allow them to care for and pamper their pet in the best way? What are their priorities in life, and how do those extend to their pets?
- How can you bundle services or products to better meet consumer needs?
- Pivoting into pets: How would we take your product and expand your brand into pet care?
- How can we better target your core audiences and anticipate their needs?
- Social commerce: Selling on social media platforms is important, and people are more likely to share pics of their pets than themselves or their kids. Could your brand take advantage of this by asking for sharing and user-generated content?

ABOUT

ANTONIO & PARIS

*Global brand innovation
& design studio.*

We transform leading brands into icons and startups into leaders.

We assist businesses at critical parts of their growth journey to define, design, and build incredible experiences for their audiences that result in increased shareholder wealth.



ABOUT

ANTONIO & PARIS

Brand Strategies That Work

From gathering data on your target market to forecasting strategies essential for your brand's future, our team's tools and methods help you innovate, disrupt the status quo, build brand equity, deliver compelling creative content, and foster consumer loyalty.

White-Glove Branding

Our team of seasoned strategy and design experts crafts both short- and long-term strategies that drive brand loyalty through meaningful consumer interactions and experiences.

We treat your brand as our own every step of the way.

Competitive Market Landscape Analysis

We conduct comprehensive, client-centered research to understand the complexities of your industry and audience.

From there, we build a brand strategy with a cohesive message that drives results.

Expansion Opportunities

Using proprietary technology and face-to-face interactions, we conduct voice-of-consumer research to uncover expansion opportunities and track industry developments, enabling your organization to plan strategically for the future.



How? Our Proprietary Tools

PlayGround Sessions

This qualitative tool helps brands understand the complex balance between practical and emotional drivers that encourage consumer engagement. These three-hour sessions are inspired by Dr. Clotaire Rapaille's theory that decisions are driven by the Reptilian Brain.

This approach delves into instincts of attraction and survival, influencing emotions (like love and hate) and practical reasoning (like price and value).

Project:FollowMe

Project:FollowMe is a cutting-edge real-time ethnographic study using digital tools to capture insights into consumer actions and behaviors.

Participants engage with brands live, responding to prompts, assignments, and more. They share photos, videos, and digital diaries, providing brands with an authentic, real-world view of their buying and engagement journeys.

Voices Across the World

When there's a need for a closer, more personal view of your audience, Voices Across the World (VAW) provides it.

This documentary-style project immerses brands in the daily lives of their target consumers, spotlighting specific needs and providing actionable insights on how to delight and serve them. Our award-winning creative team and documentary filmmakers bring unique storytelling that reveals the needs and desires that spark consumer loyalty.

Disruption Days

Disruption Days are designed to help brands identify everyday conventions within their industry and disrupt them to carve out a unique space for driving revenue and loyalty.

This process uncovers and solves key business challenges across marketing, operations, customer service, finance, and more. Strategists, designers, and storytellers work together to create innovative ideas during these convention-breaking sessions.

Historically, AT&T built products and messaging based on what they wanted to do and say. We began implementing **PlayGround sessions** to identify consumers' emotional and practical needs. We also developed **unique personas** to better highlight how the products and services mirrored the consumers.

Lastly, we developed a **Drivers Study** and creative campaigns that utilized consumer feedback to prioritize the most effective and efficient marketing messages.

All of the above not only helped to increase sales but significantly enhanced brand equity.



A&P Case Studies

From a competitive perspective, MINI utilized a typical segmentation of consumers to sell cars. Most of the category focused on practical drivers (intellectual alibis) such as MPG, size of vehicle, etc. This resulted in a commoditization of the category.

A&P recommended and implemented a segmentation based on an emotional need that focused on "individuality" and a "rebellious nature." Additionally, our design team created experiences that were authentic to the rebel in all of us.

This was not an exercise in segment demographics but based on the unique aspect of emotional needs which could then be transferred to the product.

This differentiation still holds true today.



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