

# MARS

## Mars Global Pet Parent Study

Insights into the behaviors, trends and influences  
defining a new era of Pet Parent Centricity

In partnership with



October 2024



# Methodology

The report highlights the findings from an IPSOS survey, conducted on behalf of Mars, Incorporated, to show the significant impact of pets on people's lives across the globe.



## Field dates

03/01/2024 – 04/04/2024

Online survey in 20 markets with more than 20,000 dog/cat owners and non-owners (with a minimum of 500 cat parents and 500 dog parents in each market).

Markets included:

Canada, U.S., Mexico, Brazil, South Africa, UK, Germany, France, Italy, Spain, Turkey, Poland, India, Thailand, Indonesia, Philippines, China, Japan, Australia, New Zealand

The online sample includes some rural coverage but is likely to be over-representative of population for urban areas:

**n=57,756**

Total reached out

**n=21,106**

Total interviewed

**n=10,551**

Total dog owners

**n=10,555**

Total cat owners

**n=34,890**

Total dog non-owners

**n=37,687**

Total cat non-owners

Cat and dog parents are defined as people (aged 18-65) who are responsible for the decision making or care of their domestic or tamed cat/dog, which is kept in a household for non-commercial purposes (including its feeding, health, and overall well-being).

Gen-Z: 18-27 y.o.; Millennials 28-43 y.o.; Gen X: 44-59 y.o.; Baby Boomers 60+ y.o

Data reported at a global level reflects the mean result across all the countries where the survey was conducted. It has not been weighted to reflect the population size of each country.

# About the study

We love pets and we're on a mission to become the most pet parent\* centric organization in the world

Pet parent centricity is our unwavering commitment to not only meet, but exceed the needs of pet parents and deliver exceptional products, services and experiences.

In order to do that, it is critical that we continue to lead the category while transforming the pet parent experience, so we can deepen our understanding of what makes them tick.

With insights from over 20,000 pet parents\* across 20 countries, the **Mars Global Pet Parent Study** offers an unparalleled view into the evolving needs of pet parents worldwide, reinforcing our commitment to enriching their lives and creating a better world for their furry friends.

With more than one billion pets globally, not only is pet ownership known to be on the rise, but pet parenthood is changing.

We're seeing a surge in younger pet parents who consider pets as one of the most important things in their lives thanks to the love, companionship and entertainment they provide. People are also choosing puppies and

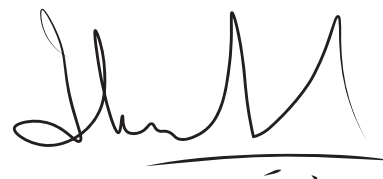
kittens rather than older pets, and are influenced by family and friends more than veterinarians.

Despite the rewards, there are also challenges – unsuitable living conditions, significant commitment, not being able to travel and neighborhoods lacking pet-friendly options remain barriers to pet ownership.

With the global pet care market expected to grow to \$427.75 billion by 2032<sup>1</sup>, there's no doubt **we're entering a new era of pet parent centricity**, where the emotional connection between an owner and their pet is stronger than ever.

We're always working on the next big thing in pet parenting. It's our job to continuously innovate and adapt, meeting the needs of today's pet parent, but also helping connect future pet parents with a four-legged companion that will bring love and joy to their daily lives.

We'll continue to create **A Better World for Pets** because pets make the world better for us.



**Ikdeep Singh**

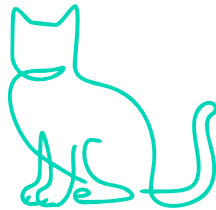
Global President of Mars Pet Nutrition

\*The term pet parents refers to dog and cat owners surveyed

1. [Fortune Business Insights: Pet Care Market 2023](#)

# With one billion pets across the world, ownership is known to be on the rise

Cat ownership is more common than dog ownership



and more men are cat owners

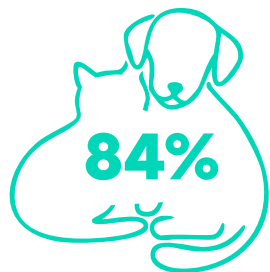
52%

MEN



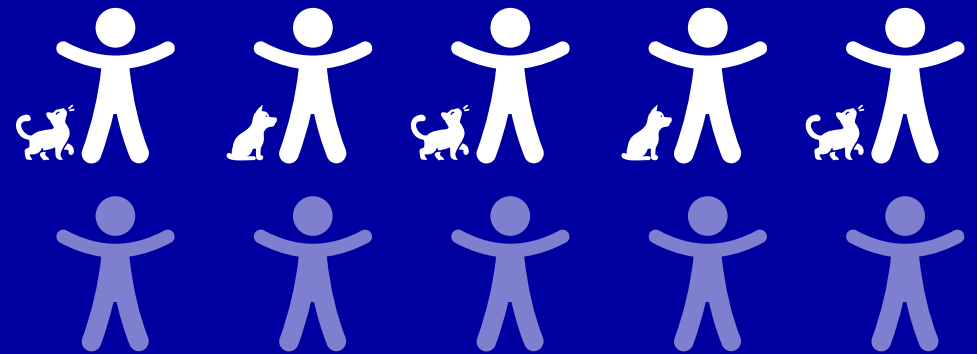
48%

WOMEN



84% of cats and dogs are acquired before the age of 12 months

## 56% of people surveyed own a cat or a dog

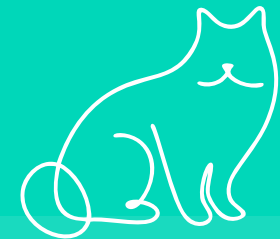


and nearly half (47%) are first time owners

## The most commonly owned breeds globally are



Labrador



Persian

Dogs: Labrador (6%), Chihuahua (6%), and Golden Retriever (5%).  
Cats: Persian (16%), British Shorthair (11%), and Siamese (9%).

# We're becoming a pet-obsessed world, with pets fast becoming one of the most important things in our lives



More than one-third (37%) of dog and cat owners consider their pets the most important thing in their lives.

And it's no surprise!  
Of those satisfied with their pets<sup>2</sup>,  
dog owners appreciate...



**Unconditional love**

**50%**



**Family completeness**

**49%**

while cat owners appreciate...



**Entertainment**

**48%**

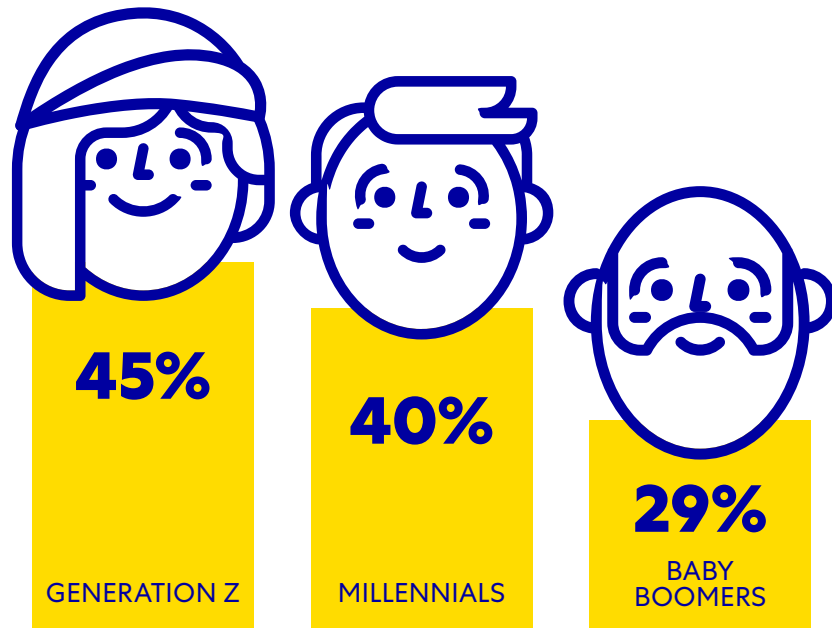


**Stress Relief**

**44%**

# Generational shifts signal a new era of pet ownership

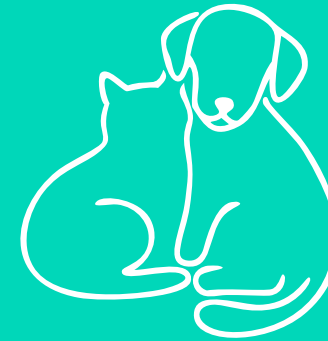
Generation Z and Millennials are the most pet-centric of all generations



**SEE THEIR PETS AS THE MOST IMPORTANT THING IN THEIR LIFE**

Generation Z and Millennials also tend to have younger pets. With...

**72%**  
of kitten owners

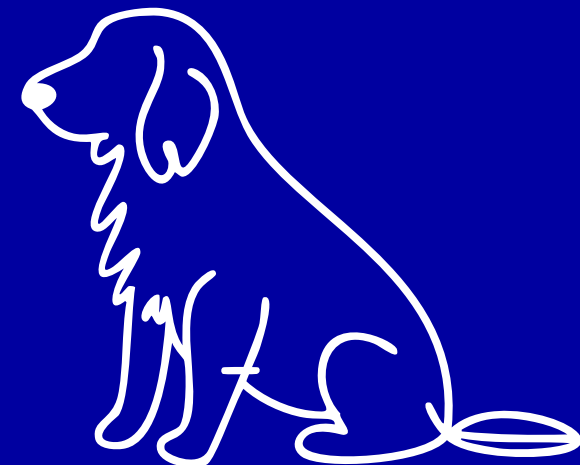


**70%**  
of puppy owners

falling within these generations

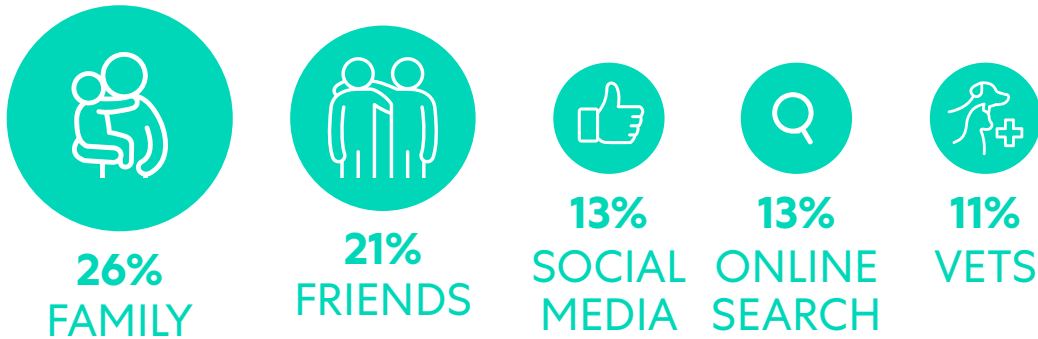
In contrast, Baby Boomers are more likely to have older pets, often over

**7**  
years old

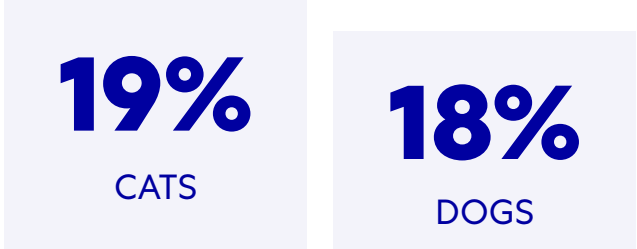


# Those around us inspire our decisions on pet ownership, but new influence channels are emerging

## Top influences on pet ownership



People primarily get their pets from friends and family



Social media appears to be an influence too, having a slightly more pronounced impact on...



It is also influencing Generation Z, with 15% using it as inspiration to get a dog, and 18% for a cat

Veterinarians have a notable impact on the selection of pet food brands (29%) and healthcare decisions (40%)



**By tackling common pain points, we can continue to transform the pet parent experience and allow more people to see the benefits of pets**

Despite the rewards, pet parenthood also brings challenges

**32% of pet parents feel guilty about leaving their dogs and cats alone**



The reasons some people don't have dogs or cats primarily relate to lifestyle

**The top barriers for non-dog owners include**



**Unsuitable living conditions**

**18%**



**Significant commitment it entails**

**18%**

**Living conditions also deter cat ownership, with challenges including**



**Furniture damage**

**15%**



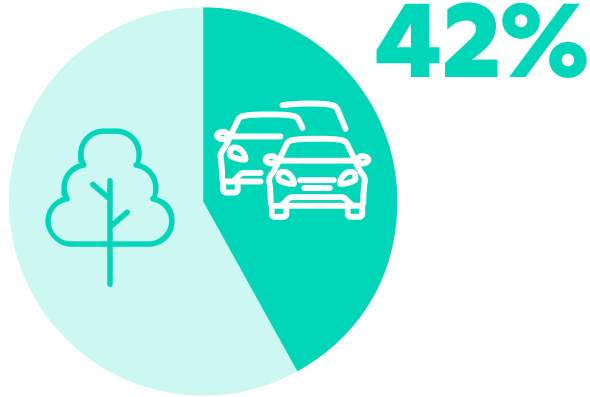
**Allergies**

**11%**



# A strong desire for more pet-friendly options at home and on the go

Less than half of pet parents find their neighborhoods very pet-friendly



**The USA is noted as the most pet-friendly country**

with countries like Canada, Brazil, India, South Africa, and New Zealand also ranking highly

Pet owners claim they find the idea of traveling with their pets demanding / challenging.



**25%**

of dog owners



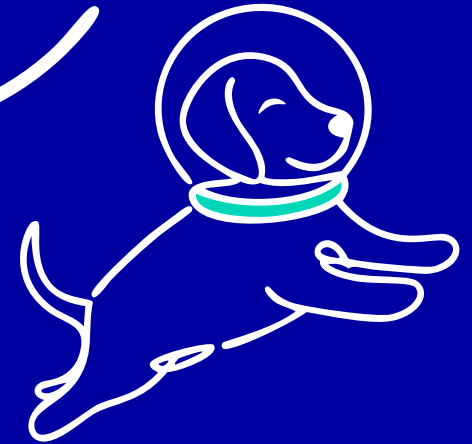
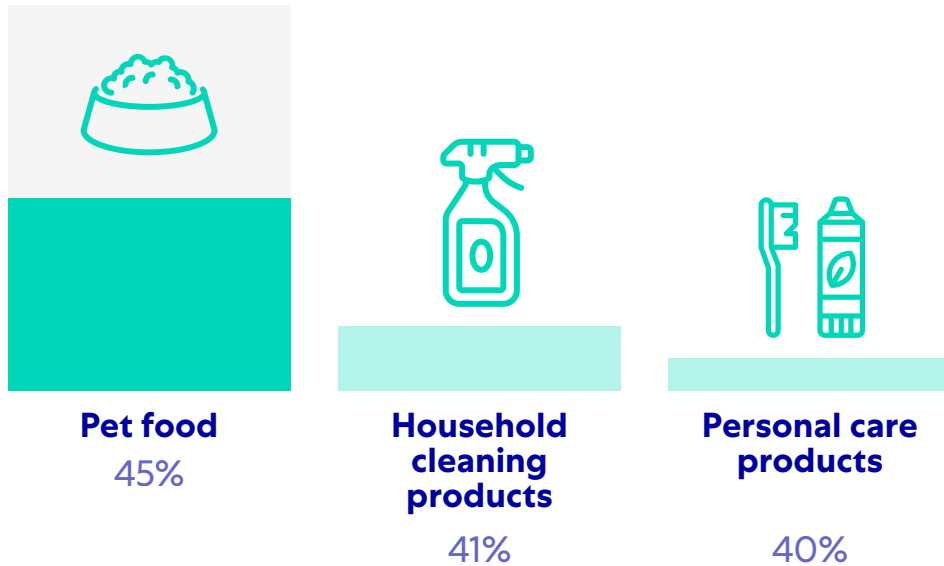
**27%**

of cat owners

# Sustainable pet ownership is a priority

## Sustainability is a key consideration for pet parents

In fact, dog/cat parents think it is very important when purchasing



This sentiment is particularly strong among Generation Z, indicating a shift towards more sustainable and ethically produced products

# About Ipsos

Ipsos is the third largest market research company in the world, **present in 90 markets** and **employing more than 18,000 people**. Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our **75 business solutions** are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

**Founded in France in 1975**, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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