



# Pet and Human Nutrition Crossover Trends and Insights



# Executive Summary

For almost two decades, MarketPlace has lived at the intersection of human and pet nutrition and lifestyle trends. A full-service strategy and creative firm, we've cultivated leading human and pet nutrition and lifestyle brands for B2C and B2B companies—food, treats, supplements, and the ingredients that make them.

*In May 2021, MarketPlace fielded a survey of pet parents to gain insight into their awareness, attitudes, and behaviors related to pet nutrition.*

MarketPlace reported this data in our [Current Pet Shopper Statistics: 2021 Trends](#) white paper, included in the second section (pp 8-38) of this document. In the first section (pp 3-7), we discuss supplemental insights and emerging product and promotion opportunities in pet inspired by purchase drivers and trends in human health and nutrition.

## Good For Me, Good For My Pet

*Probiotics. Immunity. Made in the USA. Personalized nutrition.*

For many pet parents, human-grade is an indicator of quality (although not necessarily a primary purchase driver—more on that later). Beyond ingredients, the influence of human nutrition trends in pet extends to need-states, sourcing, sustainability, how they purchase products, and even where they seek information.

### HUMAN-GRADE INGREDIENTS ARE IMPORTANT TO

**54%** of pet parents (n=506)

**63%** of pet parents who give supplements at least weekly (n=241)

Data from our May 2021 survey (pet parents, n=506) reflects the continuing correlation between the attributes and benefits people seek for themselves and those they seek for their pets. Here, we consider how those insights may be applied in product development, branding, and promotional strategies for pet nutrition products.

# A Natural Connection With Wellness

When asked what pet parents would seek in a consumable product with health benefits, naturalness was prized in both human and pet nutrition (see chart 1.1). Among the full panel of respondents, 43% (n=217) indicated that they would seek natural attributes in a health-oriented consumable for their pet.

When we look only at those who would seek natural products for themselves (n=219), the percentage of those who also sought natural health-oriented consumables for their pets climbed to 67% (n=146), a 56% increase compared to the general pet parent audience.

## Which of the following would you be most likely to seek in a product with health benefits? Select up to two.

		For <u>Your Pet</u> to Consume						
		Natural	Organic	Ingredients from the USA	Limited ingredient	Non-GMO	None of the above	Total
For <u>You</u> to Consume	Natural	146	63	42	42	32	10	219
	Organic	66	78	17	22	29	3	131
	Ingredients from the USA	40	16	76	24	13	7	117
	Limited ingredient	39	27	26	39	20	2	92
	Non-GMO	45	31	20	23	45	1	98
	None of the above	13	4	11	4	2	63	89
	<b>Total</b>	<b>217</b>	<b>133</b>	<b>119</b>	<b>96</b>	<b>80</b>	<b>81</b>	<b>506</b>

In addition to “natural,” “ingredients from the USA” (65%) and “organic” (59%) are likely to be sought for one’s pet if sought for oneself.

Of those who selected “natural” (n=219) as one of the top indicators of quality when selecting products for themselves, 37% indicated “made in the USA” as a top 3 indicator of quality in pet nutrition products, alongside clinical trials (34%) and specific ingredients (32%).

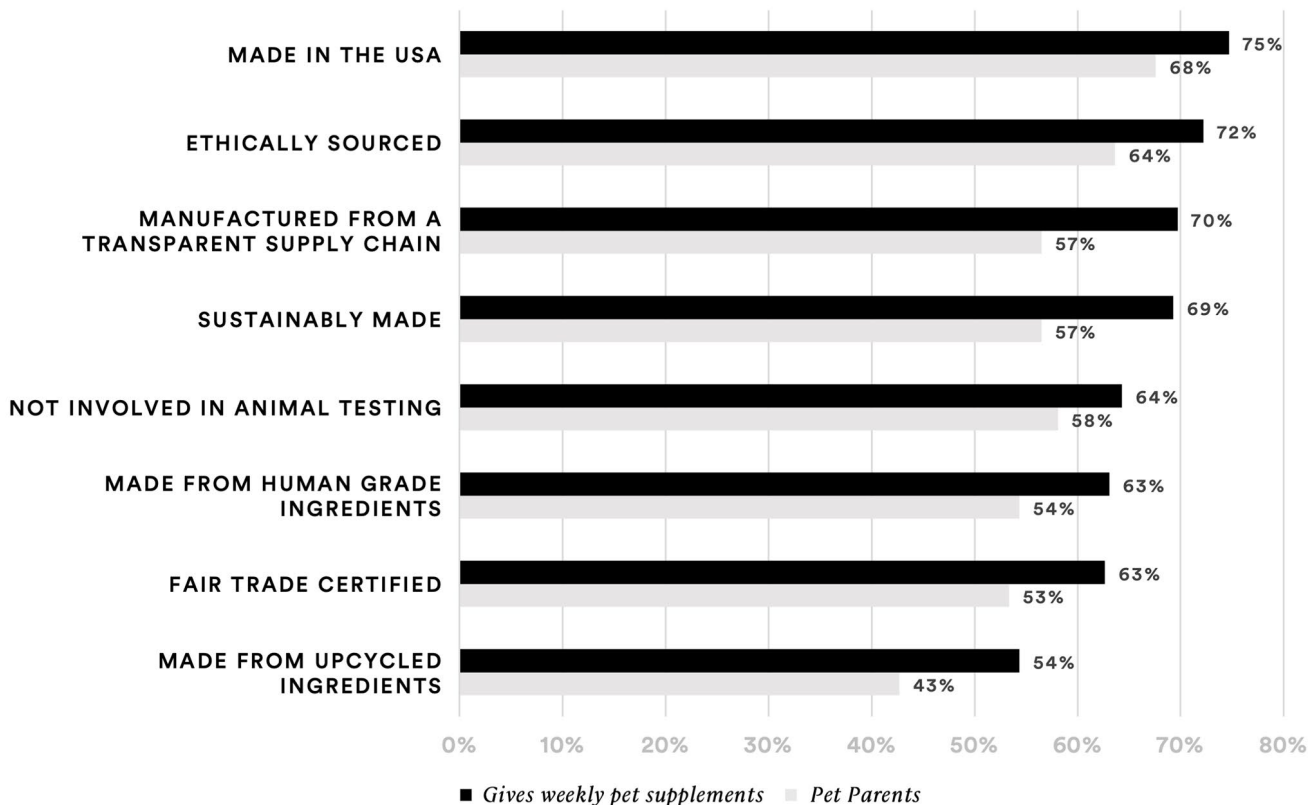
Given that “natural” sustains as a long-time trend in pet nutrition, with 40% more respondents seeking a natural claim than any other attribute tested, MarketPlace sees “naturalness” as a baseline requirement for those seeking to compete with a health-oriented position, such as in functional treats or supplements. Where clinical trials or demand-driving ingredients can distinguish a brand from others, a natural claim on its own is not uniquely differentiating.

## Sourced, Made, and Certified

“Made in the USA” is a prevalent trend, visible on pet nutrition product packaging, Amazon product page content, and promotional content. In MarketPlace’s May 2021 pet parent survey, 68% of pet parents stated it is important that products they purchase for their pets are made in the USA.

Second to “made in the USA,” respondents indicated that “ethically sourced” (64%) was of notable importance when purchasing a pet product.

CHART 2.2



*Much like “natural,” made in the USA is a meaningful descriptor, although not singularly differentiating. “Ingredients from the USA” is perhaps a greater opportunity to differentiate, since many brands in the pet nutrition space rely on ingredients sourced from around the globe. Given the additional sourcing stresses driven, in part, by COVID-19 supply chain disruptions, a 100% American-sourced and -made product could align with primary purchase considerations.*

*While messages “ethically sourced,” “manufactured from a transparent supply chain” (57%), and “Fair Trade Certified” (53%) could each reasonably be used to tell a shared story, the data indicates that certain messages—in this case, “ethically sourced”—may resonate more effectively with the general audience. Of course, how and where each message is displayed is key to effective communication.*

## High-quality and Human-grade

Among pet product considerations, a majority of pet parents indicated “human-grade” is an important attribute (see chart 2.1, above). But how important?

When offered alongside other indicators of quality in food, treats, or supplements, “human-grade” fell into the center of the pack, with 25% selecting it as a one of their top two indicators of high quality.

### INDICATORS OF HIGH QUALITY IN PET NUTRITION

**35%** → **Made in the USA**

**30%** → **Specific Ingredients**

**26%** → **Price**

*With limited billboard on packaging Principal Display Panels (PDP) and online product title character count limitations, prioritization matters. “Kitchen sink” products that offer a vast array of features and benefits can’t communicate each attribute within a first impression. To communicate a product’s unique point of difference, while including the search terms that the right shopper would be most likely to use, MarketPlace often informs our approach with data-driven intelligence. Knowledge of the category, retail channel, competitors, and the audience that the brand best serves can support a more strategic approach to product positioning, design, messaging, and promotion.*

*While “human-grade” is noted as an indicator of quality by the general pet parent audience, it is not a primary purchase driver. We would interpret this as a positive association, a nice-to-have, for the general audience that could support an overall brand position. As always, a more refined definition of an audience could change how the importance of select product attributes are weighted.*

## Supplement Takers, Supplement Givers

When we seek a deeper understanding of the pet parent audience, we seek to define who a brand’s audience should be. Our goal is, ultimately, to connect people with the brand that best serves their needs and shares their values. And we help brands find their people.

Validating and invalidating initial theories can help to hone an audience and reduce confirmation bias. In this case, the data was, indeed, validating: in the supplement category, people who consume supplements themselves are more likely to be pet supplement shoppers.

### SUPPLEMENT-TAKERS

 **more likely than average to give their pet supplements**

Of those who take supplements at least weekly (n=368), 60% also give their pet supplements at least weekly, +12% relative to the general pet parent audience surveyed.

*Among those who consume supplements themselves, it’s reasonable to interpret that an initial objection to supplements—that they’re ineffective or not necessary—is already overcome. They believe in the power of supplements; they are willing and able to purchase proactive health products. When defining a new audience or establishing targeting parameters for a digital campaign, these insights, paired with others, can be applied to fine-tune positioning and promotional efforts.*

## Building Trust in a Supplement Brand

Supplement consumption is largely based on trust. First, that supplements can work to proactively support health and wellness. Then, trust that one’s pet will consume them. And trust in the quality of the ingredients, the efficacy of the product, and in the credibility of the brand, which embodies all aspects of the customer experience.

For a new pet supplement brand entering the market, building trust can be a significant, and necessary, challenge. So, we sought those attributes that would instill, among pet parents, confidence in a pet supplement. Among the general pet parent audience (n=506), “vet recommended” (56%) was the top attribute associated with instilling confidence, followed by “clinically proven” (34%) and “all-natural” (21%).

Separately, we tested “veterinarian recommended” alongside other associations with efficacy. Again it earned top billing, with 25% of pet parents most associating “veterinarian recommended” with a highly effective pet nutrition product, nearly twice the number of respondents who selected “veterinarian formulated” (13%).

*While data is only one piece of an informed product and brand development strategy, these insights may spur investment in confirming a “veterinarian recommended” message, for which AAFCO requires a statistically sound number of veterinarians. For a “veterinarian formulated” message, AAFCO notes that “it only takes one veterinarian to support the claim.”*

*At MarketPlace, we apply these insights when consulting on formulation, prioritizing validated on-pack claims, and informing content marketing efforts that support search engine optimization (SEO).*

## There is Always More to Know

*Continue reading Current Pet Shopper Statistics: 2021 Trends for our full report of the data from our May 2021 pet parent survey.*

*Subscribe here for our next report, which covers more on the crossover between pet and human nutrition trends with a focus on Personalized Nutrition, Demand-Driving Ingredients, Ecommerce, Subscription Services, and Cause Marketing.*



# Current Pet Shopper Statistics: 2021 Trends

## Executive Summary

To better understand U.S. consumer trends in pet supplements, MarketPlace surveyed pet parents regarding their awareness, attitudes, and behaviors related to the category. This report presents the findings of this study, along with implications for pet supplement brands.

## Key Findings

- Price and a specific benefit are the first things pet parents look for in a pet supplement. Pet parents who regularly give their pet a supplement are more likely to seek a specific benefit.
- About one in five pet parents said that food meets their pets' nutritional needs, so they give supplements for specific conditions.
- When it comes to gaining confidence in a pet supplement, pet parents indicated a strong preference for “vet recommended” and “clinically proven.”
- The most preferred delivery formats for pet supplements are soft chews, treats with health benefits, and toppers. Pet parents who regularly give their pet a supplement are more likely to prefer soft chews and toppers.
- Many pet parents favor pet supplements with ingredients used in human supplements. Six in 10 who give their pet a supplement agreed that their pets should consume only ingredients that they would themselves consume.
- Pet parents who give their pet a supplement at least once per week are much more likely than average to have purchased certain condition-specific products: skin and coat, joint health, daily wellness, digestion, and immunity.



- The top ingredients pet parents reported associating with positive health benefits are:
  - Fish oil
  - Probiotics
  - Vitamin D
  - Antioxidants
  - Omegas 3 and 6
  - Glucosamine
  - Prebiotics
  - CBD (cannabidiol)
- For pet parents who give their pets a supplement at least once per week, the top claims associated with highly effective pet nutrition products are “Veterinarian approved,” “Clinically supported,” and “Veterinarian recommended.”
- Half of pet parents who give their pets a supplement at least once per week would likely seek “natural” products with health benefits for their pet, and about one-third would seek “organic” products.
- The protein trend in human nutrition has likely influenced pet parents’ perceptions of high-protein claims in nutrition-focused food and supplements for pets. More than four in 10 pet parents indicated that high protein is desirable in these products.
- Pet parents who give their pets a supplement at least once per week are more likely than average to be aware of subscription services for their pets and to consider using one.
- Pet parents who give their pets a supplement at least once per week are more likely than average to say it is important to them that the products they buy for their pets are:
  - Made in the USA
  - Sustainably made
  - Made from upcycled ingredients
  - Manufactured from a transparent supply chain
  - Ethically sourced
  - Fair trade certified
  - Not involved in animal testing
  - Made from human grade ingredient
- When it comes to information sources about pet nutrition, pet parents who give their pets a supplement at least once per week tend to go to their personal vet, YouTube, friends and family, online searches, or Facebook.

# Methodology

MarketPlace conducted a survey of pet parents to develop insights into consumer perceptions and behaviors regarding supplements for pets. In June 2021, MarketPlace partnered with Dynata to conduct a survey of 506 U.S. pet parents who currently have at least one dog, cat, or horse. Findings from this study were presented at the 2021 Annual Conference of the National Animal Supplement Council.

# Findings

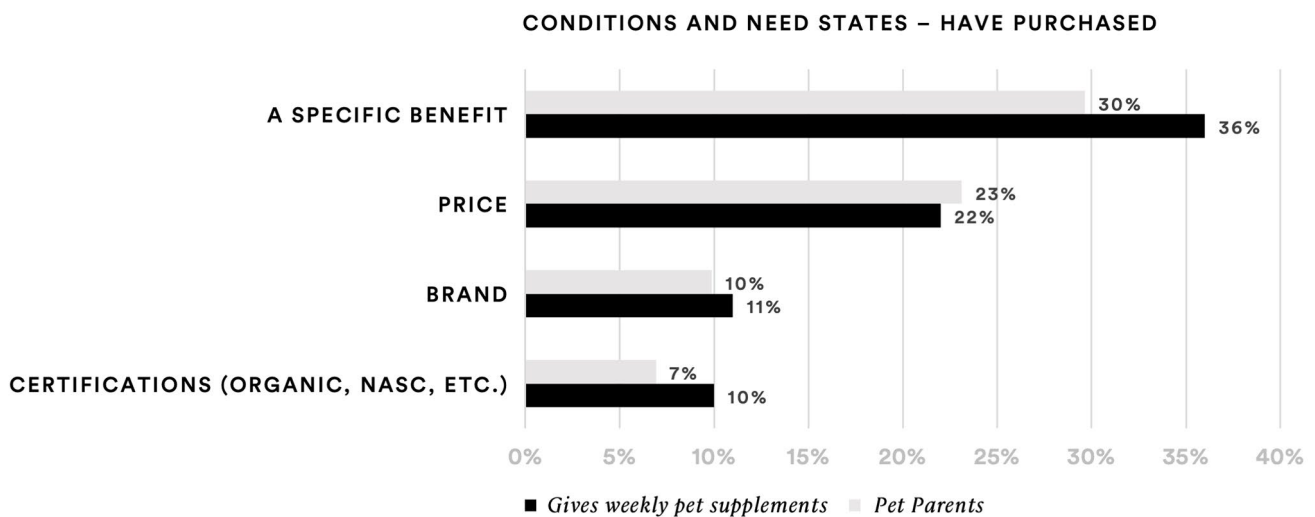
## *Price and specific benefits are the priority considerations for pet parents looking for pet supplements*

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### BRAND INSIGHTS

Pet supplement brands are best served by focusing on effective delivery of specific benefits. Messaging and branding should focus on establishing efficacy. For brands with extensive product lines, analysis of pet specialty retail store scan data will help to optimize pricing. Since pricing is the first thing that about one-fourth of pet parents look for when purchasing a pet supplement, it will be important to go to market at a price point that aligns with consumer expectations.

### *Purchase Drivers*



## If purchasing a supplement for my pet, the first thing I would look for is:

<b>A specific benefit</b>	<b>30%</b>
<b>Price</b>	<b>23%</b>
<b>Brand</b>	<b>10%</b>
<b>Certifications (Organic, NASC, etc.)</b>	<b>7%</b>
<b>Reviews</b>	<b>7%</b>
<b>I would not purchase a pet supplement</b>	<b>6%</b>
<b>A specific ingredient</b>	<b>5%</b>
<b>None of the above</b>	<b>5%</b>
<b>Format (for example, whether it's a liquid, chew, pill, etc.)</b>	<b>4%</b>
<b>Flavor</b>	<b>2%</b>
<b>Other</b>	<b>2%</b>

### *Perceptions vary as to the extent to which pet food meets nutritional needs*

Over half of pet parents (56%) indicated that their pets' food meets their nutritional needs. Just over one in five (22%) said the food they buy meets their pets' needs, so they do not give them supplements. However, while 21% agreed that the food meets their pets' nutritional needs, these pet parents said they give supplements for specific conditions. Similarly, 13% agree that the food meets their pets' needs but give them supplements for added benefits. About 16% give supplements because they do not believe food alone has enough nutrition.

Conversely, pet parents who give their pets supplements at least once per week are much more likely to agree that:

- "My pet's food meets their nutritional needs, and I give them supplements for specific conditions or issues they face" (29%).
- "Food alone does not meet my pet's nutritional needs, so I give my pet supplements" (23%).
- "My pet's food meets their nutritional needs, and I give them supplements for added benefits" (20%).

## BRAND INSIGHTS

Given the variation in pet parents' perceptions of nutritional content in pet food vis-à-vis pet supplements, supplement brands may wish to focus messaging on the specific health benefits that supplements provide and steer away from negative messaging about pet food. This way, brands may appeal to both the audience who believes pet food meets nutritional needs and those who believe it does not.

### Which of the following best aligns with your perspective on pet supplements?

<b>My pet's food meets their nutritional needs, so a pet supplement is not needed.</b>	<b>22%</b>
<b>My pet's food meets their nutritional needs and I give them supplements for specific conditions or issues they face.</b>	<b>21%</b>
<b>Food alone does not meet my pet's nutritional needs, so I give my pet supplements.</b>	<b>16%</b>
<b>My pet's food meets their nutritional needs and I give them supplements for added benefits.</b>	<b>13%</b>
<b>Pet supplements are too expensive to purchase on top of the price of food.</b>	<b>9%</b>
<b>It is a struggle to get my pet to take supplements, so I do not purchase them.</b>	<b>8%</b>
<b>I do not believe pet supplements are effective.</b>	<b>7%</b>
<b>I'm not sure if pet supplements are effective, but I give them to my pet at least occasionally in case they are.</b>	<b>4%</b>

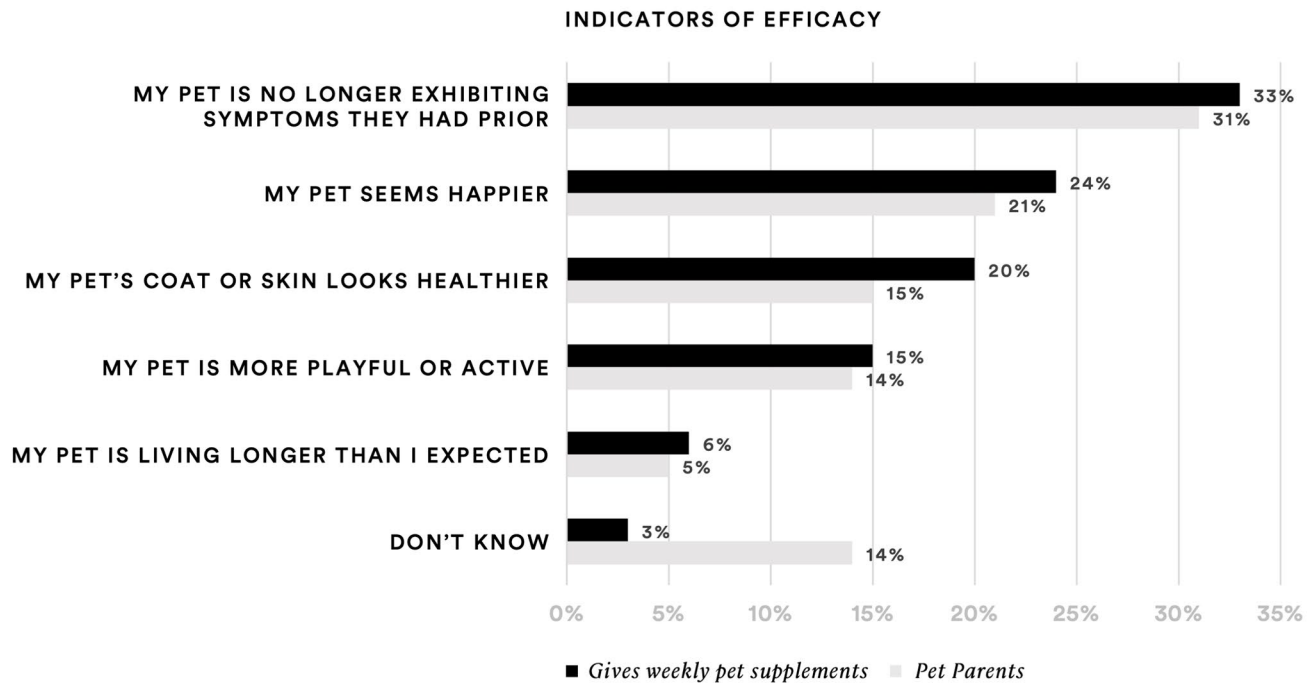
### *Symptom relief, perceived happiness are top indicators of efficacy*

Just over half of pet parents surveyed said that the best indicator that a supplement is working is either that their pet is no longer exhibiting symptoms they had prior (31%) or that their pet seems happier (21%). Pet parents who take a supplement for themselves at least once per week indicated similarly.

Pet parents who give their pet a supplement at least once per week, on the other hand, were slightly more likely than average to agree that indicators of efficacy would be that their pet is no longer exhibiting symptoms they had prior (33%), seems happier (24%), or that their skin or coat looks healthier (20%). Very few recognized longevity as one of the best indicators of efficacy of pet supplements.

## BRAND INSIGHTS

Pet supplement brands have numerous opportunities to communicate the top indicators of efficacy. Art direction and copywriting in advertising and packaging, online assets, and overall branding should communicate the possibilities of symptom abatement and happiness for pets.



**Which of the following would you consider to be the best indicator that a supplement is working for your pet?**

<b>My pet is no longer exhibiting symptoms they had prior.</b>	<b>31%</b>
<b>My pet seems happier.</b>	<b>21%</b>
<b>My pet's coat or skin looks healthier.</b>	<b>15%</b>
<b>Don't know</b>	<b>14%</b>
<b>My pet is more playful or active.</b>	<b>14%</b>
<b>My pet is living longer than I expected.</b>	<b>5%</b>

## *Pet parents trust veterinarian recommendations, clinical studies*

When it comes to gaining confidence in a pet supplement, pet parents indicated a strong preference for “vet recommended” (56%) and “clinically proven” (34%). These preferences suggest a preference for experts as sources of authoritative information on pet supplements. Some pet parents also indicated that “all-natural” and “Made in America” claims gave them added confidence in a pet supplement.

Pet parents who take a supplement for themselves at least once per week are more likely than average to prefer “vet recommended” pet supplements (61%). Pet parents who give their pet a supplement at least once per week are more likely than average to prefer “all natural” (26%).

### **BRAND INSIGHTS**

The data suggest that medically authoritative sources, such as the vet or clinical studies, have the most potential to instill confidence in a consumer for a pet supplement they are considering. Pet supplement brands that can also make “all natural” and made-in-USA claims will benefit from communicating these attributes on package, in advertising, and in other communications.

### **Which of the following attributes would give you the most confidence in a pet supplement you were considering for your pet?**

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<b>Vet recommended</b>	<b>56%</b>
<b>Clinically proven</b>	<b>34%</b>
<b>All natural</b>	<b>21%</b>
<b>Made in America</b>	<b>15%</b>
<b>Made with ingredients from the USA</b>	<b>12%</b>
<b>Organic</b>	<b>9%</b>
<b>None of the above</b>	<b>6%</b>
<b>Non-GMO Project Verified</b>	<b>4%</b>
<b>AAFCO approved</b>	<b>4%</b>
<b>NASC Quality Seal</b>	<b>2%</b>

## *Soft chews are the most preferred format for pet supplements*

Although there was not a format preferred by a majority of pet parents, the most preferred delivery formats for pet supplements are soft chews (38%), treats with health benefits (22%), or toppers (not kibble or powder) (22%). Pet parents who give their pet a supplement at least once per week are more likely than average to prefer soft chews (42%) and toppers (not kibble or powder) (29%).

### **BRAND INSIGHTS**

The data suggest that tablets (11%), capsules (7%), and tinctures (5%) are falling out of favor. Pet supplement brands may be able to carve out a niche within one or more formats. However, soft chews, treats, and toppers will have the broadest appeal and should be a good fit for brands with extended product lines.

### **If purchasing a supplement for my pet, I would most prefer the following formats.**

<b>Soft chew</b>	<b>38%</b>
<b>A treat made with ingredients that provide health benefits</b>	<b>22%</b>
<b>Food topper that is not a kibble or powder format (e.g., gravy)</b>	<b>22%</b>
<b>Kibble</b>	<b>19%</b>
<b>Liquid (e.g., broth)</b>	<b>15%</b>
<b>Powder (e.g., to sprinkle on food)</b>	<b>15%</b>
<b>Tablet</b>	<b>11%</b>
<b>Capsule</b>	<b>7%</b>
<b>No answer</b>	<b>7%</b>
<b>Tincture (e.g., concentrated herbal extract)</b>	<b>5%</b>

## *Pet parents tend to associate ingredients used in human supplements with high quality*

Many pet parents favor pet supplements with ingredients used in human supplements. About four in 10 pet parents (40%) surveyed agreed that ingredients used in human supplements are also good for pets. Nearly half of pet parents (49%) agreed pets should consume only ingredients that they would themselves consume. And 42% of pet parents surveyed agreed that human-grade pet supplements are higher quality than pet supplements that are not human grade.

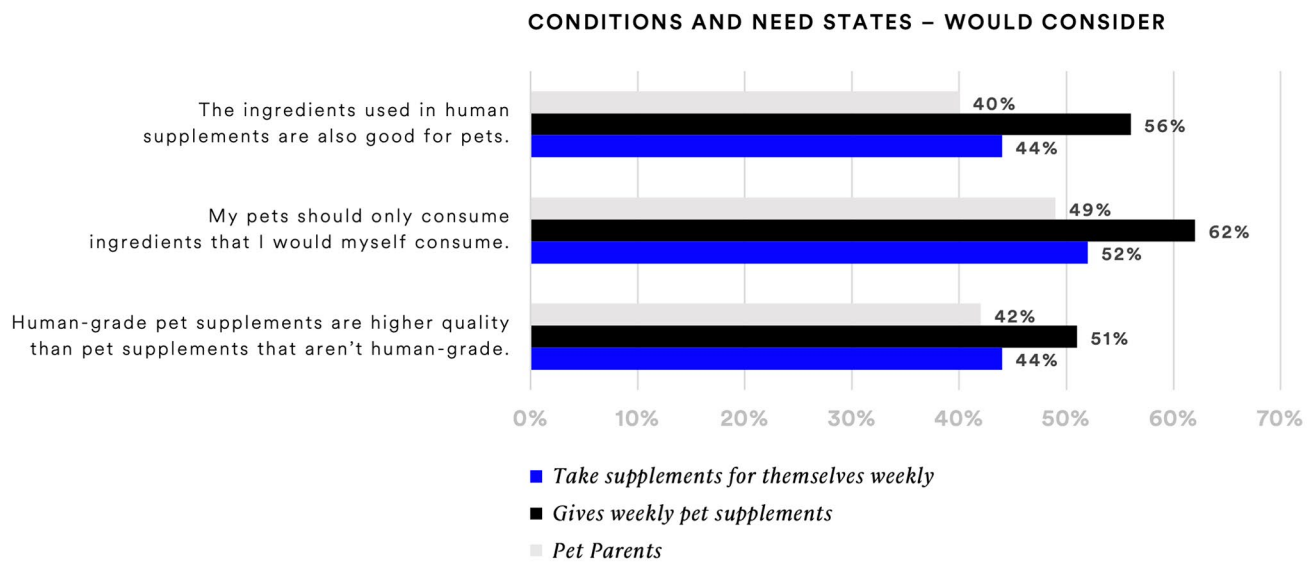


Over half of pet parents (52%) who take supplements for themselves agreed that pets should consume only ingredients that they would themselves consume. Pet parents who give their pet a supplement at least once per week are much more likely than average to agree that:

- “The ingredients used in human supplements are also good for pets” (56%)
- “My pets should only consume ingredients that I would myself consume” (62%)
- “Human-grade pet supplements are higher quality than pet supplements that aren’t human grade” (51%)

## BRAND INSIGHTS

Elsewhere in this study, the data point to positive associations with common human supplement ingredients in pet supplements. These include fish oil, probiotics, antioxidants, and omegas 3 and 6 fatty acids. Pet parents who already give their pets supplements at least once per week are more likely to have these positive associations. These findings suggest that pet parents are primed to associate quality with common human supplement ingredients in pet supplements.



Read the following statements listed below. Rate each on how strongly you agree or disagree. Use the scale provided.

	<i>Strongly agree</i>	<i>Somewhat agree</i>	<i>Neither agree nor disagree</i>	<i>Somewhat disagree</i>	<i>Strongly disagree</i>	<i>No answer</i>
<b>The ingredients used in human supplements are also good for pets.</b>	<b>17%</b>	<b>23%</b>	<b>28%</b>	<b>13%</b>	<b>14%</b>	<b>5%</b>
<b>My pets should only consume ingredients that I would consume myself.</b>	<b>24%</b>	<b>25%</b>	<b>25%</b>	<b>13%</b>	<b>10%</b>	<b>3%</b>
<b>Human-grade pet supplements are higher quality than pet supplements that aren't human-grade.</b>	<b>19%</b>	<b>23%</b>	<b>38%</b>	<b>9%</b>	<b>6%</b>	<b>7%</b>

### *Pet parents are likely to take supplements for themselves*

Taking supplements for oneself is popular among pet parents, with over half reporting taking supplements every day (54%). An additional 19% report taking a supplement at least once per week, but not every day. Pet parents who give their pet a supplement at least once per week are much more likely than average to report taking supplements every day (68%).

Additionally, about one-fourth of pet parents surveyed said they give their pets supplements every day (26%). Notably, pet parents who take supplements for themselves are more likely than average to give their pets supplements every day (33%).

### **BRAND INSIGHTS**

These data bolster the aforementioned conclusion that pet parents are primed to make positive associations between common ingredients in human supplements and the same ingredients in pet supplements. This finding also suggests potential targeting opportunities in media that are popular sources for information on human supplements.

## Currently, how often do you take supplements?

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Every day	54%
At least once per week, but not every day	19%
I don't use supplements	13%
Less than once per week, but at least once per month	6%
Less than once per month	4%
On occasion, such as to address a symptom	3%
Don't know	1%
On occasion, as a preventative (such as before travel)	1%

## Currently, how often do you give supplements to your pet?

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I don't give supplements to any of my pets	28%
Every day	26%
At least once per week, but not every day	22%
Less than once per week, but at least once per month	10%
On occasion, such as to address a symptom (such as allergies)	6%
Less than once per month	5%
On occasion, as a preventative (such as before/during boarding)	2%
Don't know	1%

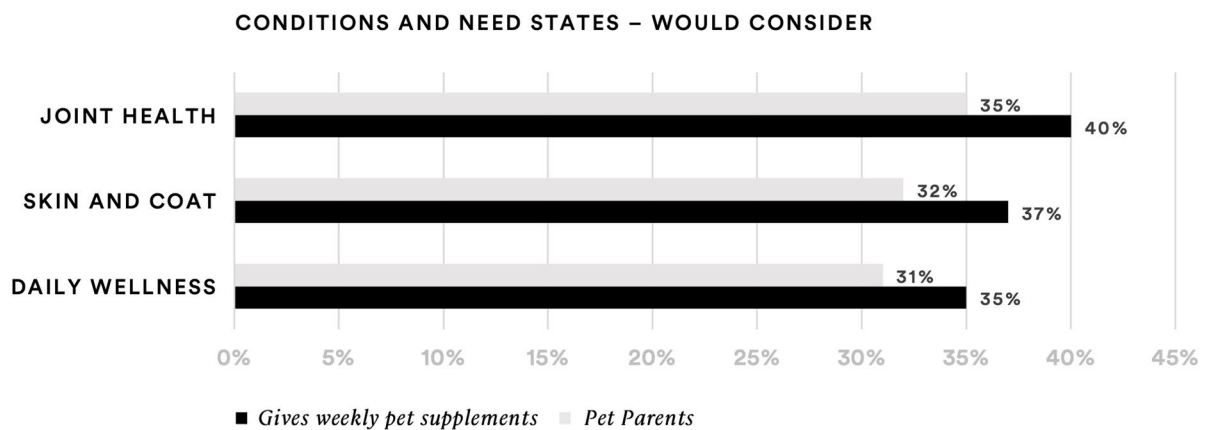
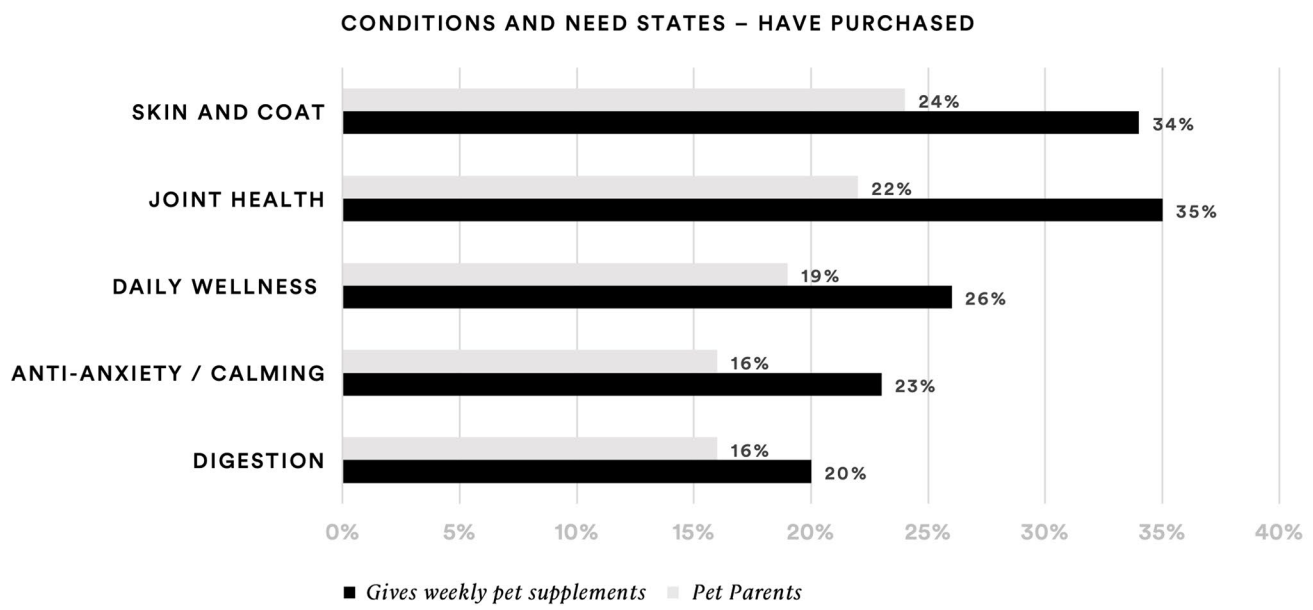
*Pet parents are most likely to purchase, or consider purchasing, skin and coat and joint health supplements for their pets*

The most purchased pet supplements among pet parents surveyed are skin and coat (24%), joint health (22%), daily wellness (19%), anti-anxiety/calming (16%), and digestion (16%). Pet parents who give their pet a supplement at least once per week are much more likely than average to have purchased certain condition-specific products: skin and coat (34%), joint health (35%), daily wellness (26%), digestion (23%), and immunity (20%).

When it comes to the pet supplements pet parents might consider, they indicated that they are most likely to consider supplements for their pets' joint health (35%), skin and coat (32%), and daily wellness (31%). Pet parents who give their pet a supplement at least once per week are much more likely than average to consider the same condition-specific products: joint health (40%), skin and coat (37%), and daily wellness (35%).

## BRAND INSIGHTS

Joint health and skin and coat represent the largest opportunity in condition-specific pet supplements. A significant opportunity also exists for daily wellness products. Supplement brands that are looking to launch or expand product lines should include some or all these categories. However, brands should not overlook niche opportunities in emerging categories, such as senior wellness, anti-anxiety, gut health, and allergy.



**For which of the following conditions have you purchased products for your pet?**

<b>Skin and coat</b>	<b>24%</b>	<b>Weight gain</b>	<b>11%</b>
<b>Joint health</b>	<b>22%</b>	<b>Heart and liver</b>	<b>10%</b>
<b>None of the above</b>	<b>21%</b>	<b>Senior wellness</b>	<b>9%</b>
<b>Daily wellness</b>	<b>19%</b>	<b>Eye health</b>	<b>8%</b>
<b>Anti-anxiety / calming</b>	<b>16%</b>	<b>Cognitive function / brain health</b>	<b>8%</b>
<b>Digestion</b>	<b>16%</b>	<b>Urinary and kidney</b>	<b>8%</b>
<b>Pain relief</b>	<b>14%</b>	<b>Paw / hoof</b>	<b>7%</b>
<b>Allergy relief</b>	<b>12%</b>	<b>Weight management</b>	<b>6%</b>
<b>Gut health</b>	<b>12%</b>	<b>Other</b>	<b>2%</b>
<b>Immunity</b>	<b>11%</b>		

**For which of the following conditions would you consider purchasing products for your pet, if it were within your budget to do so?**

<b>Joint health</b>	<b>35%</b>	<b>Immunity</b>	<b>24%</b>
<b>Skin and coat</b>	<b>32%</b>	<b>Heart and liver</b>	<b>24%</b>
<b>Daily wellness</b>	<b>31%</b>	<b>Proactive health</b>	<b>22%</b>
<b>Pain relief</b>	<b>28%</b>	<b>Eye health</b>	<b>21%</b>
<b>Senior wellness</b>	<b>28%</b>	<b>Cognitive function</b>	<b>16%</b>
<b>Anti-anxiety / calming</b>	<b>26%</b>	<b>Paw / hoof</b>	<b>14%</b>
<b>Allergy relief</b>	<b>25%</b>	<b>Weight gain</b>	<b>12%</b>
<b>Gut health</b>	<b>25%</b>	<b>None of the above</b>	<b>11%</b>
<b>Urinary and kidney</b>	<b>24%</b>	<b>Other</b>	<b>1%</b>

## *Pet parents have various contextual reasons to give, or consider giving, calming and joint supplements to their pets*

Pet parents are most likely to consider “calming” supplements (22%) over similar types of supplements. However, pet parents who give their pet a supplement at least once per week are much more likely than average to prefer “relaxation” (24%). The top reasons pet parents indicated for considering giving their pet a calming supplement are being home alone (26%), vet visits (22%), weather (storms) (22%), or travel (20%).

Pet parents who give their pet a supplement at least once per week are somewhat more likely than average to consider giving their pet a calming supplement for vet visits (26%), weather (storms) (27%), or travel (23%). These pet parents are much more likely to give calming supplements for grooming (22% vs. 15% average).

Additionally, pet parents surveyed are most likely to consider “hip and joint health” supplements (22%) over similar types of supplements. Pet parents who give their pet a supplement at least once per week are somewhat more likely than average to prefer “hip and joint health” (25%).

### **BRAND INSIGHTS**

Given the variety of reasons that might prompt a pet parent to give a calming or relaxation supplement, pet supplement brands may wish to consider appeals to multiple contexts in their communication strategy. Advertising, packaging, and other consumer-oriented communications about “calming” or “anti-anxiety” supplements should highlight situations that may prompt a need state, like pets being left home alone, vet visits, weather, and travel. The terms “calming” and “anti-anxiety” appear to resonate most with consumers. Likewise, the term “hip and joint health” resonates with pet parents, particularly those who give their pet a supplement.

### **Which of the following types of supplements would you be most likely to consider for your pet?**

---

<b>None of the above</b>	<b>26%</b>
<b>Calming</b>	<b>22%</b>
<b>Anti-anxiety</b>	<b>17%</b>
<b>Relaxation</b>	<b>16%</b>
<b>Stress relief</b>	<b>16%</b>
<b>Sleep support</b>	<b>3%</b>

Select the options that describe reasons why you might consider giving your pet a calming supplement.

Home alone	26%	None of the above	15%
Vet visit	22%	Sleep support	15%
Weather (e.g., storms)	22%	Destructive behavior	14%
Travel	20%	Doggy daycare	10%
Outside noises (e.g., fireworks)	17%	Boarding	8%
Grooming	15%	Other	2%

Which of the following types of supplements would you be most likely to consider for your pet?

Hip and joint health	22%
Joint support	19%
Pain management	18%
Joint relief	14%
Mobility	14%
Agility	13%

*Pet parents are most likely to associate fish oil, probiotics with health benefits for pets*

The top ingredients pet parents reported associating with positive health benefits are:

- Fish oil (24%)
- Probiotics (22%)
- Vitamin D (19%)
- Antioxidants (16%)
- Omegas 3 and 6 (15%)



- Glucosamine (14%)
- Probiotics (13%)
- CBD (cannabidiol) (11%)

Pet parents who give their pet a supplement at least once per week are more likely than average to associate the following with health benefits:

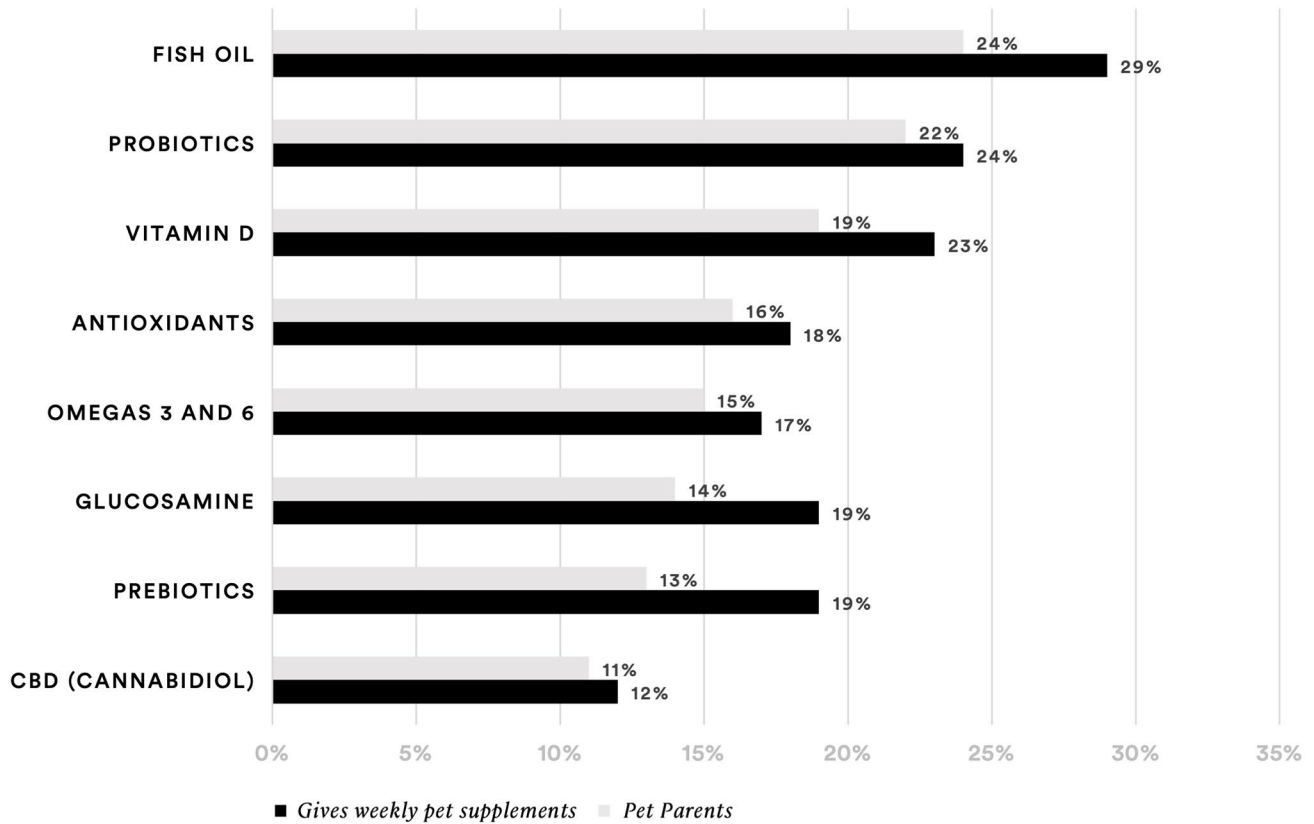
- Fish oil (29%)
- Probiotics (24%)
- Vitamin D (23%)
- Antioxidants (18%)
- Omegas 3 and 6 (17%)
- Glucosamine (19%)
- Probiotics (19%)
- CBD (cannabidiol) (12%)

## BRAND INSIGHTS

Since pet parents are most likely to associate fish oil and probiotics with positive health benefits, these ingredients should be strongly considered for any relevant formulations. The data show that many other ingredients in human supplements, such as antioxidants, omega-3, and glucosamine, are also relevant to pet parents.

Interestingly, pet parents associated vitamin D with health benefits, even though it rarely appears as a stand-alone supplement. While it is an essential vitamin and needs to be ingested via diet, **excessive vitamin D can be toxic to dogs**. Consumer interest in vitamin D (for humans) rose during the COVID-19 pandemic. Within this context, the survey finding suggests low awareness about vitamin D and pets but further validates the conclusion that trends in human supplements are drivers of trends in pet supplements.

### INGREDIENTS ASSOCIATED WITH HEALTH BENEFITS



Which of the following ingredients would you be most likely to associate with positive health benefits for your pet?

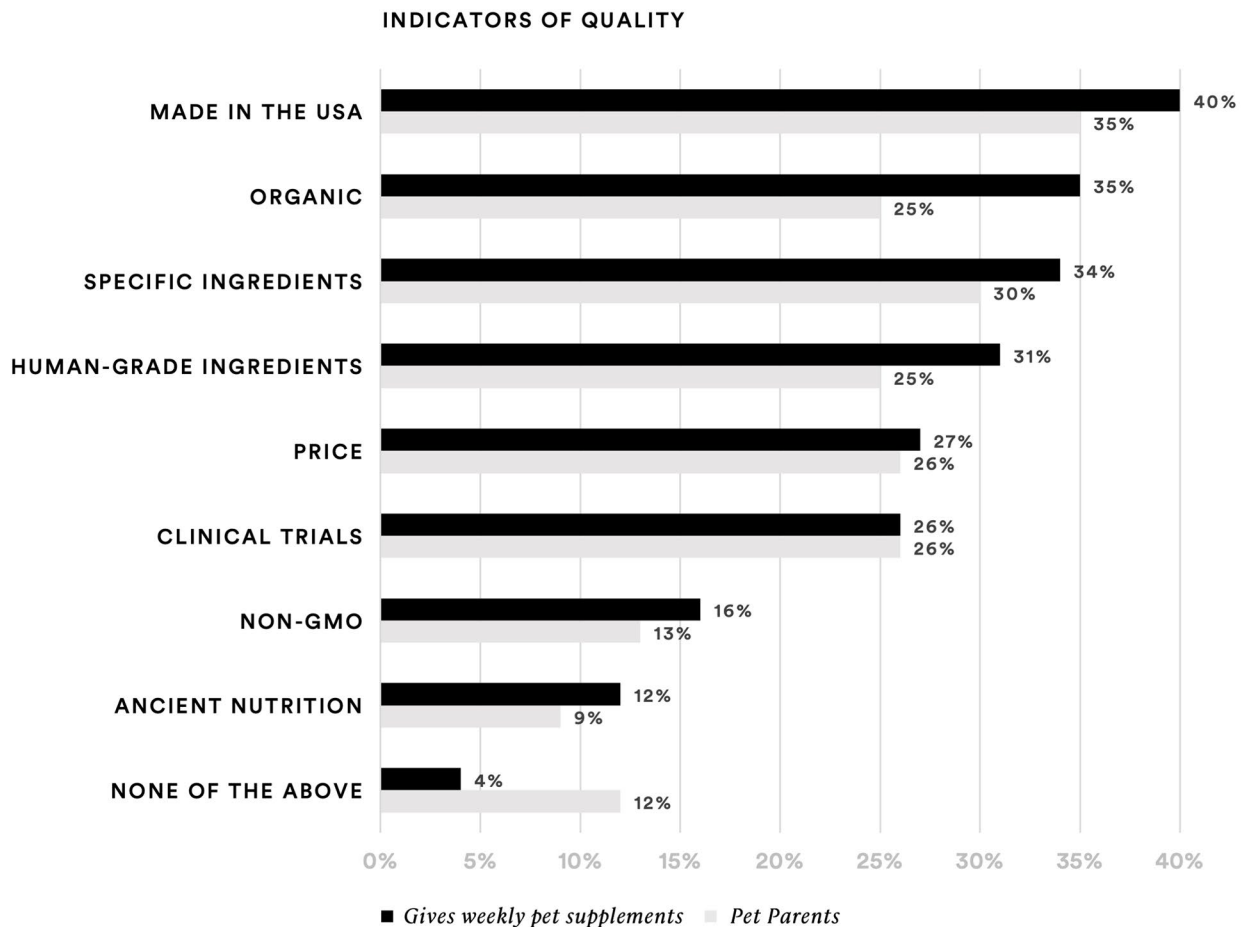
Fish oil	24%	Biotin	9%	Triphala	3%
Probiotics	22%	Turmeric	9%	L-Theanine	3%
None of the above	21%	Hemp	8%	Nootropics	3%
Vitamin D	19%	Chondroitin	8%	Colostrum	3%
Antioxidants	16%	Apple cider vinegar	6%	Fermented yeast	3%
Omegas 3 and 6	15%	Postbiotics	6%	Marine algae	3%
Glucosamine	14%	Elderberry	5%	Zinc	2%
Prebiotics	13%	Chlorophyll	4%	Terpenes	2%
CBD (cannabidiol)	11%	Trace minerals	4%	Astaxanthin	2%
B-complex	10%	Krill oil	4%	Adaptogens	2%
Collagen	9%	Hyaluronic acid	4%	Shatavari	1%

## Made in the USA claims are strong indicators of quality in pet consumables

Indicators of quality in pet consumables are “made in the USA” claims (35%), use of specific ingredients (30%), price (26%), clinical trials (26%), human-grade ingredients (25%), and organic claims (25%). Pet parents who give their pet a supplement at least once per week are much more likely than average to associate organic (35%) with high quality.

### BRAND INSIGHTS

Pet brands that can claim U.S. origins, clinical trials, and organic ingredients may wish to do so on packaging, web assets, and other media. Furthermore, the data suggest that pet parents are looking for specific ingredients. This fact aligns with the finding that noted a preference for specific benefits. Brands should also be cognizant about how price influences perceptions of quality and should, thus, tread carefully with aggressively low pricing.



## Which of the following are, in your opinion, the best indicators of high quality in food, treats, or supplements for pets?

<b>Made in the USA</b>	<b>35%</b>
<b>Specific ingredients</b>	<b>30%</b>
<b>Price</b>	<b>26%</b>
<b>Clinical trials</b>	<b>26%</b>
<b>Human-grade ingredients</b>	<b>25%</b>
<b>Organic</b>	<b>25%</b>
<b>Non-GMO</b>	<b>13%</b>
<b>None of the above</b>	<b>12%</b>
<b>Ancient nutrition</b>	<b>9%</b>

### *Low overall awareness of branded ingredients among pet parents*

When buying supplements for themselves, pet parents tend not to seek a specific branded ingredient. However, 44% of pet parents indicated that they seek specific ingredient(s) but do not seek a specific ingredient brand. In contrast, 43% of pet parents who give their pets a supplement at least once per week said that, in supplements for themselves, they seek a specific ingredient with its own brand name.

About one-in-four (27%) indicated they seek a specific ingredient with a brand name, though when asked to identify the branded ingredients, pet parents tended to name product brand names or generic names of specific ingredients. This finding suggests low awareness and possible confusion among pet parents as to their understanding of branded ingredients in human supplements.

When it comes to pet supplements, nearly four in 10 pet parents (37%) indicated that they seek specific ingredient(s) but do not seek a specific ingredient brand in supplements for their pets. However, the same percentage (37%) of pet parents who give their pets a supplement at least once per week said that, in supplements for their pets, they seek a specific ingredient with its own brand name.

## BRAND INSIGHTS

Like the finding in human supplements, when asked to identify the branded ingredients in pet supplements, pet parents tended to name product brand names or generic names of specific ingredients. Formulation of pet supplements with branded ingredients has potential to enhance perceived value but requires strategic communication to raise consumer awareness and understanding of the ingredient's unique benefits.

### When selecting a supplement for yourself, do you seek specific ingredient brands?

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<b>I seek specific ingredient(s) but do not seek a specific ingredient brand.</b>	<b>44%</b>
<b>I seek a specific ingredient that has its own brand name.</b>	<b>27%</b>
<b>I take supplements but do not seek a specific ingredient when making a selection.</b>	<b>15%</b>
<b>I do not take supplements.</b>	<b>13%</b>

### When selecting a supplement for your pet, do you seek an ingredient that has its own brand name?

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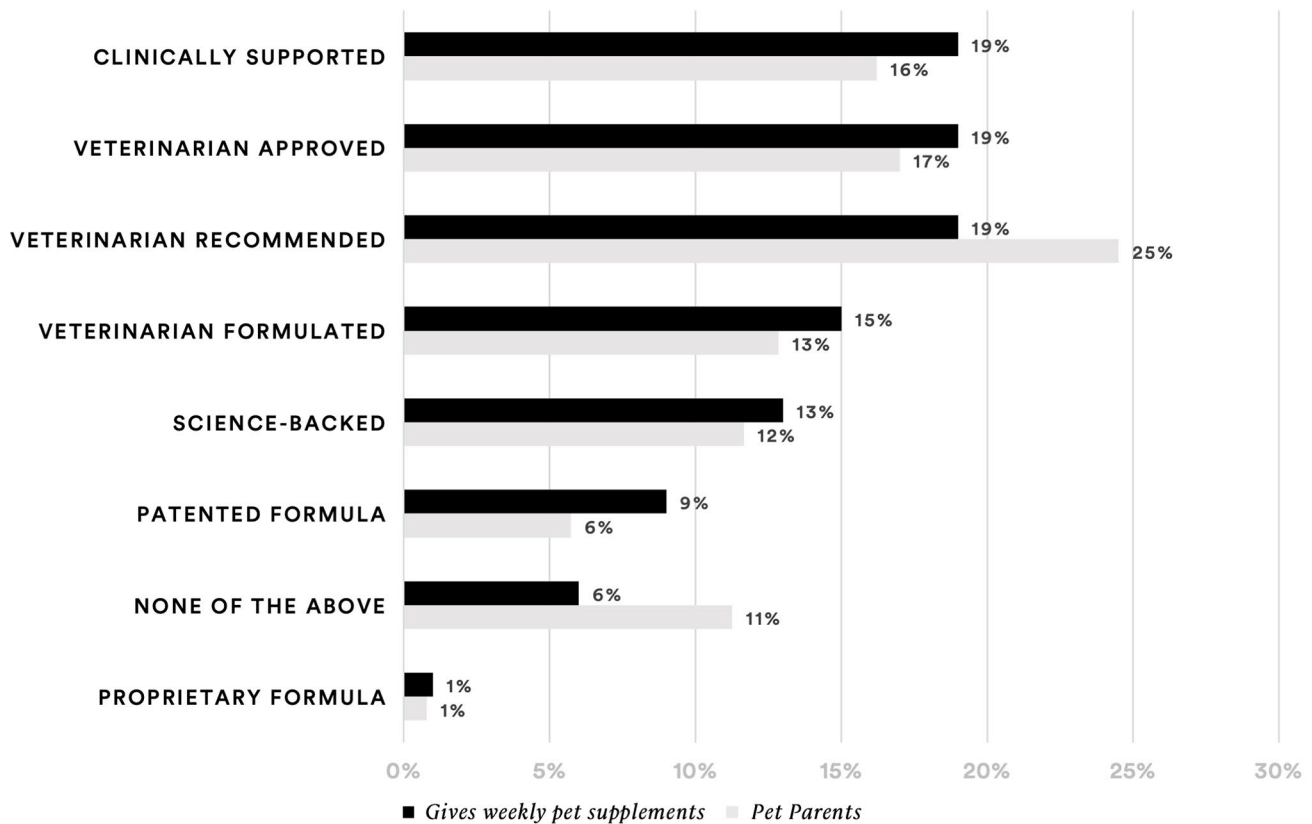
<b>I seek specific ingredient(s) but do not seek a specific ingredient brand.</b>	<b>37%</b>
<b>I do not give my pet supplements.</b>	<b>25%</b>
<b>I seek a specific ingredient that has its own brand name.</b>	<b>23%</b>
<b>I purchase pet supplements but do not seek a specific ingredient when making a selection.</b>	<b>14%</b>

### *Veterinarian recommendation and approval signals high efficacy in pet nutrition*

The study tested several scientific or veterinarian-related claims. One in four pet parents (25%) said they associate “veterinarian recommended” with highly effective pet nutrition products. For pet parents who give their pets a supplement at least once per week, the top claims associated with highly effective pet nutrition products are “Veterinarian approved” (19%), “Clinically supported” (19%), and “Veterinarian recommended” (19%).

## BRAND INSIGHTS

Efficacy is a key purchase driver for pet parents choosing a pet supplement. Brands that can leverage authoritative sources in pet medicine, such as veterinarians and clinical research, have an advantage in making appeals to efficacy on packaging and in marketing communications.



**Which of the following claims would you most associate with a highly effective pet nutrition product, like a supplement or food?**

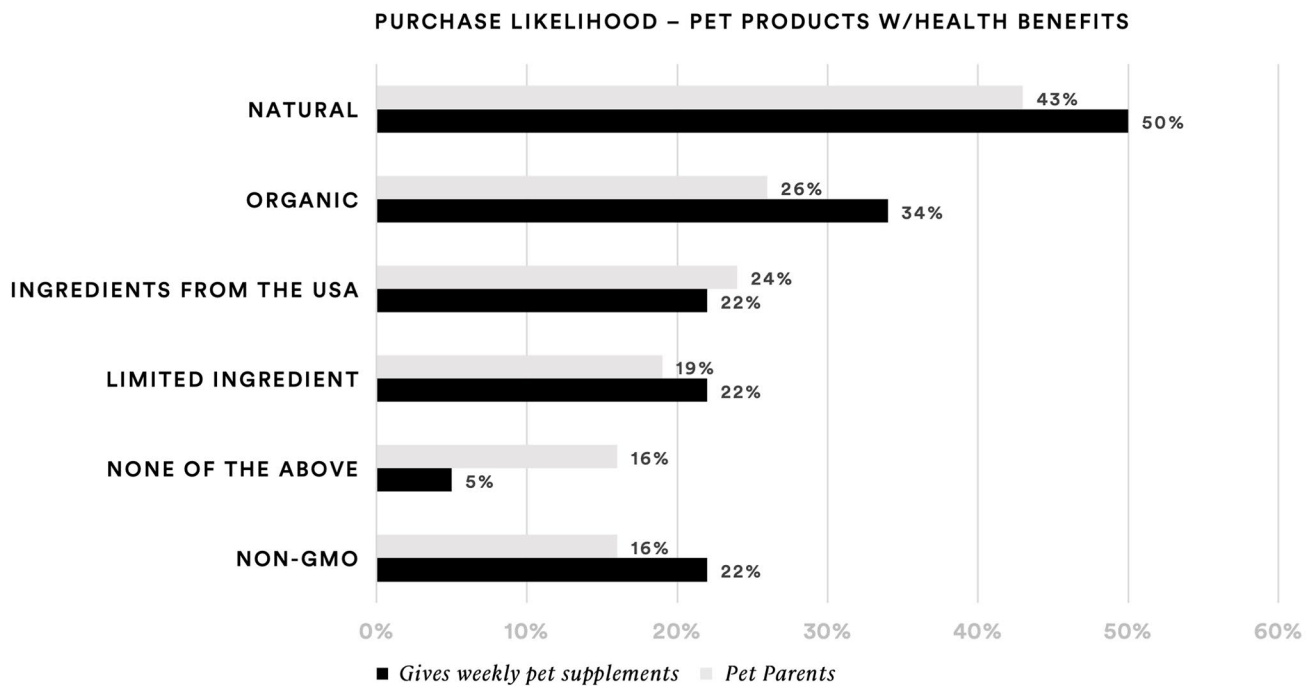
Veterinarian recommended	25%
Veterinarian approved	17%
Clinically supported	16%
Veterinarian formulated	13%
Science-backed	12%
None of the above	11%
Patented formula	6%
Proprietary formula	1%

More than four in 10 pet parents (43%) said they would likely seek “natural” products with health benefits for their pet to consume. About one in four (26%) would seek “organic” products. Half of pet parents (50%) who give their pets a supplement at least once per week would likely seek “natural” products with health benefits for their pet to consume, and about one-third (34%) would seek “organic” products.

When asked about health products for themselves to consume, pet parents’ responses were nearly identical to their responses to the previous question. Separately, when asked about health products for themselves to consume, pet parents who give their pets a supplement at least once per week are more likely than average to seek out non-GMO items (26% vs. 16% average).

## BRAND INSIGHTS

Pet supplement brands that can make all-natural claims may improve their appeal to pet parents, in general. Although “organic” does not necessarily have broad appeal, it does matter to a sizeable niche of consumers. Among pet parents who already give supplements on a regular basis, non-GMO claims also have niche appeal, though this will matter less when converting new supplement consumers from the general pet parent audience.





**Which of the following would you be most likely to seek in a product with health benefits for your pet to consume?**

<b>Natural</b>	<b>43%</b>
<b>Organic</b>	<b>26%</b>
<b>Ingredients from the USA</b>	<b>24%</b>
<b>Limited ingredient</b>	<b>19%</b>
<b>None of the above</b>	<b>16%</b>
<b>Non-GMO</b>	<b>16%</b>

*High protein in nutrition-focused products is desirable to pet parents*

**Which of the following would you be most likely to seek in a product with health benefits for you to consume?**

<b>Natural</b>	<b>43%</b>
<b>Organic</b>	<b>26%</b>
<b>Ingredients from the USA</b>	<b>23%</b>
<b>Non-GMO</b>	<b>19%</b>
<b>Limited ingredient</b>	<b>18%</b>
<b>None of the above</b>	<b>18%</b>

The protein trend in human nutrition has likely influenced pet parents' perceptions of high-protein claims in nutrition-focused food and supplements for their pets to consume. More than four in 10 pet parents indicated that high protein is desirable in these products. Pet parents similarly found high protein desirable in nutrition-focused food and supplements for themselves.

Notably, over half of pet parents surveyed who give their pets a supplement at least once per week (52% vs. 43% average) agreed that high protein is a desirable trait in products for their pets' nutrition. Additionally, pet parents who give their pets a supplement at least once per week are also more likely than average to find "grain-free" desirable (24% vs. 19% average).

**BRAND INSIGHTS**

Although most supplement formats are not conducive to delivering a high dose of protein, inclusion of high-quality protein may be an attractive feature in any nutritionally focused product. For example, soft chews, treats, and specialized foods may be effective formats for pairing protein claims alongside specific health benefits.

**Which of the following qualities do you find most desirable in nutrition-focused products, such as food or supplements, for your pet to consume?**

High in protein	43%	Plant-based	10%
None of the above	25%	Lactose-free	8%
High in fiber	21%	Keto	6%
Grain-free	19%	Low FODMAP	6%
Gluten-free	14%	Paleo	4%
Raw	12%	Fermented	4%

**Which of the following qualities do you find most desirable in nutrition-focused products, such as food or supplements, for you to consume?**

High in protein	39%	Grain-free	10%
High in fiber	27%	Raw	8%
Non of the above	25%	Keto	7%
Gluten-free	16%	Fermented	6%
Plant-based	12%	Paleo	5%
Lactose-free	11%	Low FODMAP	4%

*Pet parents who give supplements are more likely to consider using a subscription service*

Subscription services may provide opportunities for pet supplement and nutritional brands. For the most part, most pet parents have some level of awareness of subscription services that sell nutrition services for humans. Only 28% of pet parents are unaware of any services that provide personalized nutrition for themselves. However, pet parents who give their pets a supplement at least once per week are more likely to be aware of these services for themselves and to consider using one (29% vs. 21% average).

Although awareness is lower for such services for pet products, pet parents who already give supplements to their pets on a regular basis are more likely to consider using them. On average, over one-third (35%) of pet parents surveyed are unaware of any services that provide personalized nutrition for their pets. On the other hand, pet parents who give their pets a supplement at least once per week are more likely to be aware of these services for their pets and to consider using one (24% vs. 18% average).

### BRAND INSIGHTS

Only about one-third (33%) of pet parents said they have not used a subscription service for their pet nutritional products and would not consider it. In contrast, far fewer (21%) pet parents who give their pets a supplement at least once per week said the same.

Pet parents, in general, said free shipping (35%), money back guarantees (25%), and significant discounts (22%) would prompt them to consider a subscription service. These data suggest that pet parents are willing to consider supplement-focused subscription services, which opens new avenues for brands to attract new customers.

### Which of the following options best describes your relationship to personalized nutrition services for you?

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<b>I am unaware of any services that provide personalized nutrition.</b>	<b>28%</b>
<b>I am aware of services that provide personalized nutrition and would consider using one.</b>	<b>21%</b>
<b>I am aware of services that provide personalized nutrition but would not consider using one.</b>	<b>18%</b>
<b>I am aware of services that provide personalized nutrition and do not have an opinion about them.</b>	<b>18%</b>
<b>Don't know</b>	<b>8%</b>
<b>I currently pay for a service that provides personalized nutrition.</b>	<b>7%</b>

## Which of the following options best describes your relationship to personalized nutrition services for pets?

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I am unaware of any services that provide personalized nutrition for pets.	35%
I am aware of services that provide personalized nutrition for pets and would consider using one.	18%
I am aware of services that provide personalized nutrition for pets but would not consider using one.	15%
I am aware of services that provide personalized nutrition for pets and do not have an opinion about them.	13%
I currently pay for a service that provides personalized nutrition for my pet.	10%
Don't know	9%

## Which of the following best describes your feelings about subscription services, specifically for pet nutrition products (supplements, food, treats)?

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I have not used a subscription service and would not consider it.	33%
I have not used a subscription service but would consider it.	30%
I currently use a subscription service and like it.	14%
I have used a subscription service in the past and would consider doing so again.	9%
I have used a subscription service in the past and would not consider doing so again.	7%
I currently use a subscription service and do not like it.	7%

## Which of the following would be most likely to prompt you to consider a subscription service for pet nutrition products, such as supplements, pet food, or treats?

Free shipping	31%
Money back guarantee if not satisfied	25%
I would not consider a subscription service regardless of benefits	23%
A significant discount (15% or more)	22%
Ease of cancellation	21%
Personalized nutrition for my pet	20%
First month free	12%
Other	2%

### *Transparency, sustainability, and ethical practices are important to pet parents when buying pet products*

Pet parents tend to agree that, when buying products for their pets, it is important to them that the products are made in the USA (67%), sustainably made (56%), made from upcycled ingredients (43%), manufactured from a transparent supply chain (57%), ethically sourced (63%), fair trade certified (53%), not involved in animal testing (58%), and made from human grade ingredients (54%).

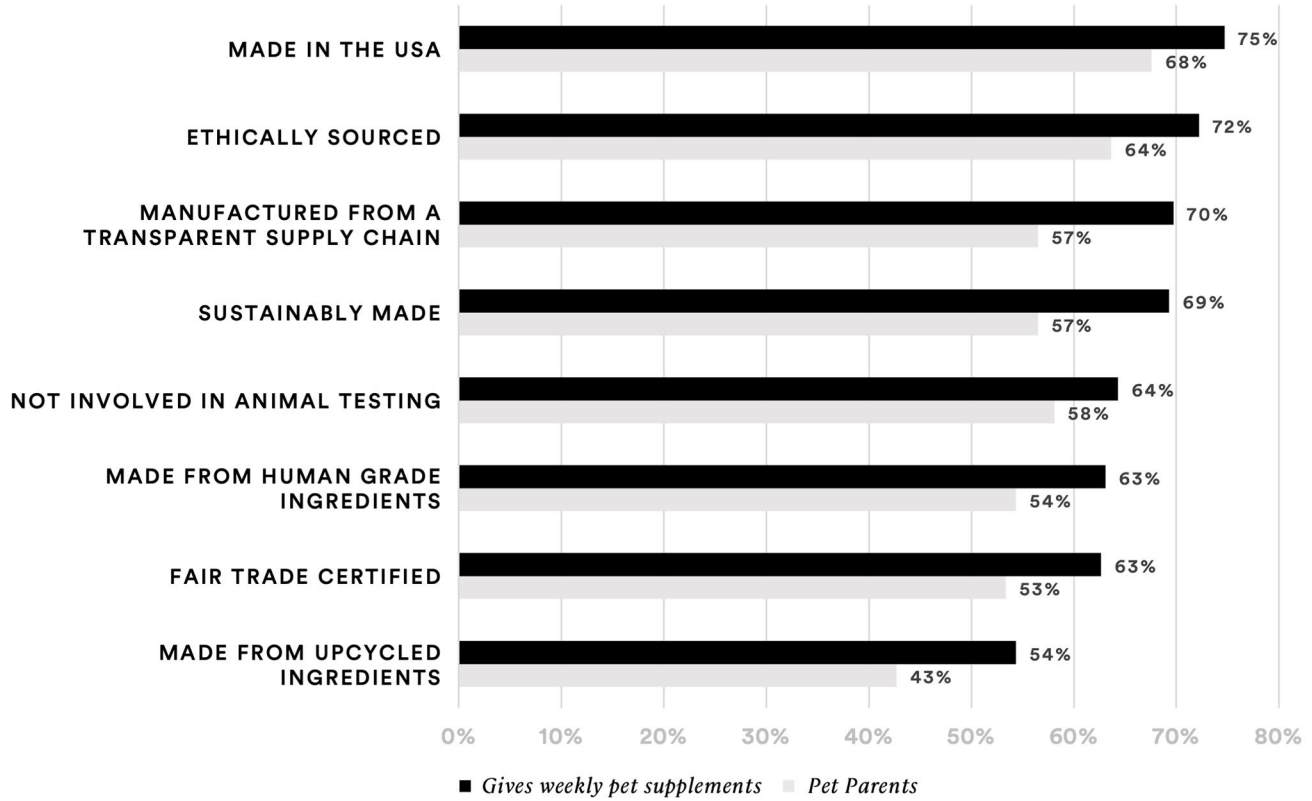
Moreover, pet parents who give their pets a supplement at least once per week were more likely than average to say it is important to them that the products they buy for their pets are made in the USA (75%), sustainably made (70%), made from upcycled ingredients (54%), manufactured from a transparent supply chain (70%), ethically sourced (72%), fair trade certified (62%), not involved in animal testing (64%), and made from human grade ingredients (63%).

Furthermore, pet parents who give their pets a supplement at least once per week are highly likely to want their purchases to support shelters (75%) or want their purchases to support restoring the environment (65%).

## BRAND INSIGHTS

The high agreement among pet parents who give their pets supplements indicates that these attributes may be especially meaningful to this target audience. Pet supplement brands may gain credibility by appealing to transparency, sustainability, and ethical practices. Doing so may serve as a potential differentiator and encourage first-time trial and repeat purchase.

### TRANSPARENCY CLAIMS



“It is important to me that products I buy for my pet are \_\_\_\_.”

	<i>Somewhat agree</i>	<i>Strongly agree</i>
<b>Made in the USA</b>	<b>27%</b>	<b>40%</b>
<b>Sustainably made</b>	<b>27%</b>	<b>29%</b>
<b>Made from upcycled ingredients</b>	<b>20%</b>	<b>23%</b>
<b>Manufactured from a transparent supply chain</b>	<b>27%</b>	<b>30%</b>
<b>Ethically sourced</b>	<b>29%</b>	<b>34%</b>
<b>Fair trade certified</b>	<b>26%</b>	<b>27%</b>
<b>Not involved in animal testing</b>	<b>22%</b>	<b>36%</b>
<b>Made from human grade ingredients</b>	<b>27%</b>	<b>27%</b>

**“It is important to me that some of proceeds from the products I buy for my pet go to support \_\_\_\_.”**

	<i>Somewhat agree</i>	<i>Strongly agree</i>
<b>Animal shelters</b>	<b>27%</b>	<b>39%</b>
<b>Restoring the environment</b>	<b>26%</b>	<b>26%</b>

Pet parents tend to agree that it is important to them that the packaging for pet products is sustainable (58%), recyclable (64%), compostable (58%), made from only natural materials (56%), or made without plastic (55%). This sentiment was even higher among pet parents who give their pets a supplement at least once per week. This subgroup agreed that it is important to them that the packaging for pet products is sustainable (72%), recyclable (77%), compostable (69%), made from only natural materials (69%), or made without plastic (66%).

**BRAND INSIGHTS**

Sustainable packaging is another potential key differentiator for pet supplement brands. Manufacturers should take into consideration packaging materials and post-consumer use as a medium to emphasize their brand values.

*Online sources, friends, and family are key information sources about health and wellness, for themselves and their pets*

**“It is important to me that packaging used for the products I buy for my pet is \_\_\_\_.”**

	<i>Strongly disagree</i>	<i>Somewhat disagree</i>	<i>Neither agree nor disagree</i>	<i>Somewhat agree</i>	<i>Strongly agree</i>	<i>No answer</i>
<b>Sustainable</b>	<b>5%</b>	<b>7%</b>	<b>26%</b>	<b>26%</b>	<b>32%</b>	<b>3%</b>
<b>Recyclable</b>	<b>3%</b>	<b>5%</b>	<b>25%</b>	<b>29%</b>	<b>35%</b>	<b>3%</b>
<b>Compostable</b>	<b>3%</b>	<b>7%</b>	<b>29%</b>	<b>29%</b>	<b>29%</b>	<b>3%</b>
<b>Made from only natural materials</b>	<b>5%</b>	<b>8%</b>	<b>29%</b>	<b>29%</b>	<b>27%</b>	<b>3%</b>
<b>Made without plastic</b>	<b>4%</b>	<b>9%</b>	<b>30%</b>	<b>23%</b>	<b>32%</b>	<b>3%</b>

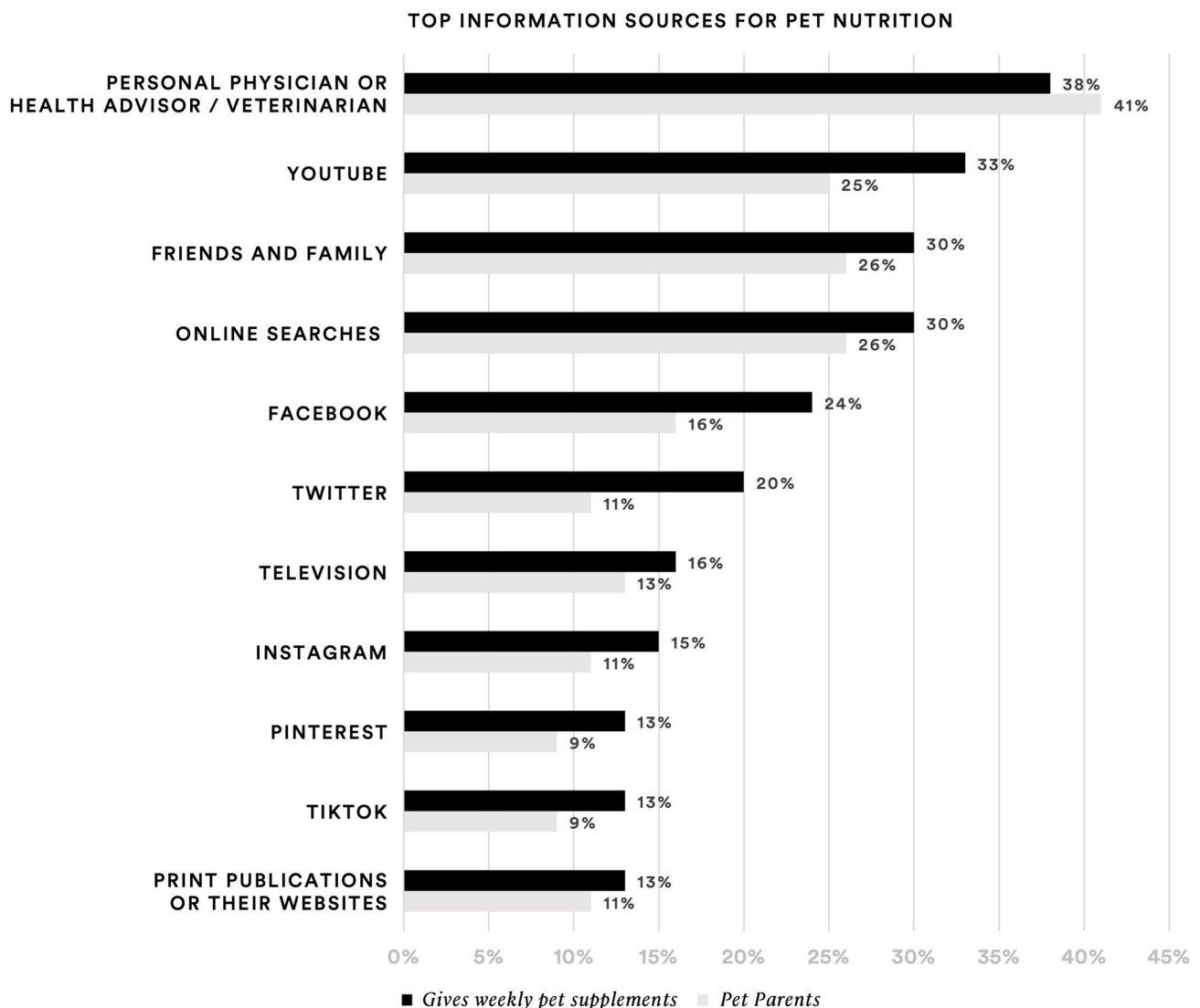
When pet parents seek inspiration or information about health and wellness for themselves, they tend to go to a personal physician (37%), friends and family (31%), online searches (28%), YouTube (27%), or Facebook (24%). However, for pet parents who give their pets a supplement at least once per week, they tend to go to YouTube (38%), friends and family (37%), online searches (32%), a personal physician (32%), or Facebook (29%).

When it comes to seeking inspiration or information on health and wellness for their pets, pet parents tend to go to their personal vet (41%), online searches (26%), friends and family (26%), YouTube (25%), and Facebook (16%). On the other hand, YouTube is more popular with pet parents who give their pets a supplement at least once per week (33%).

## BRAND INSIGHTS

Investing in strong online assets, search engine optimization, and social media planning are critical to raising awareness and shaping attitudes about pet supplement brands. Content should be easily shared with friends and family. Brands may also benefit from highlighting veterinarian recommendations or encouraging pet parents to ask their personal vet about a supplement product.

## Thank You For Reading





## Where do you seek inspiration or information on health and wellness for yourself?

Personal physician or health advisor / veterinarian	37%	Twitter	11%
Friends and family	31%	TikTok	11%
Online searches (e.g., Google, DuckDuckGo)	28%	Print publications or their websites (e.g., The New York Times or nytimes.com)	11%
YouTube	27%	Nutrition program (e.g., Weightwatchers)	8%
Facebook	24%	Celebrity physician or health advisor (e.g., Dr. Oz, Dr. Axe)	7%
Instagram	18%	Bloggers	5%
Television (e.g., CNN, Fox News, NBC News)	16%	Podcasts	4%
Pinterest	14%	Webinars	3%
None of the above	12%	Other	2%

If you have any questions or would like to request more information about our study, please contact

## Where do you seek inspiration or information on health and wellness for your pet?

Personal physician or health advisor / veterinarian	41%	Print publications or their websites (e.g., The New York Times or nytimes.com)	11%
Online searches (e.g., Google, DuckDuckGo)	26%	TikTok	9%
Friends and family	26%	Pinterest	9%
YouTube	25%	Bloggers	5%
Facebook	16%	Celebrity physician or health advisor (e.g., Dr. Oz, Dr. Axe)	5%
None of the above	13%	Nutrition program (e.g., Weightwatchers)	4%
Television (e.g., CNN, Fox News, NBC News)	13%	Webinars	3%
Twitter	11%	Other	3%
Instagram	11%	Podcasts	2%

us at [hello@market-pl.com](mailto:hello@market-pl.com).

## Working With MarketPlace

For almost two decades, MarketPlace has lived at the intersection of human and pet nutrition and lifestyle trends. A full-service strategy and creative firm, we've cultivated leading human and pet nutrition and lifestyle brands for B2C and B2B companies—food, treats, supplements, and the ingredients that make them.

If you're working to launch a pet supplement brand, we do that, too—let's talk!