

# APPA's State of the Industry 2024

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## Strategic Insights from the National Pet Owner Survey

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## Background and Purpose

**The American Pet Products Association (APPA) was established to promote, develop and advance responsible pet ownership and the pet products industry.**

To this end, APPA supports industry-related market research, monitors and responds to industry legislation and regulation, and sponsors educational seminars, networking and PR opportunities, giving members the tools they need to make important business decisions.

APPA also works closely with other major organizations dedicated to similar goals to accomplish these and other important objectives.

In 1988, APPA began gathering information about pet ownership, pet care practices, purchasing behavior of pet-related products and sources of pet-related goods and services.

APPA's objective is to monitor consumer habits on an ongoing basis to identify short- and long-term trends, as well as new opportunities in pet ownership and pet product and service consumption.

This report represents the ongoing effort to make insights publicly available, by the pet industry and for the pet industry.

Because around eighty percent of pet ownership is comprised of dogs and cats, they will be the focus of parts of this report.

Where applicable, we inserted research from other data sources to lend context to the themes represented in this report.

Pet Influence:  
Right now, 63% of US  
households have pets...  
which means **180,000,000**  
adult consumers live in a  
household that own a pet!

Source: James Lloyd, DVM PhD, Animal Health Economics



In 2023, the Pet Industry supplied an overall economic contribution\* of:

# \$303 Billion

An increase of 16% from \$260 billion in 2022.



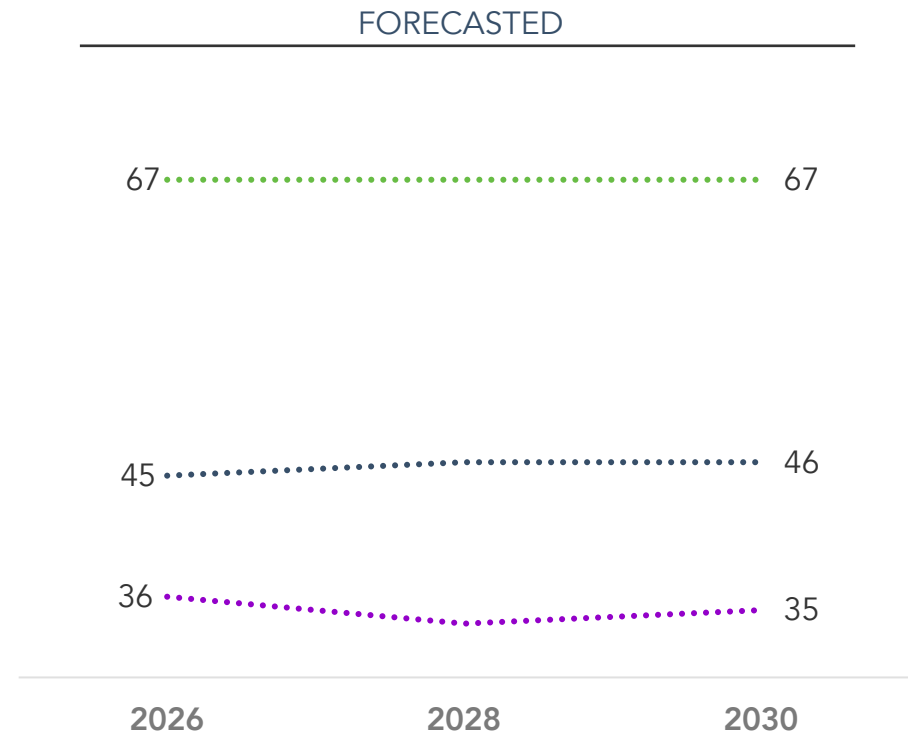
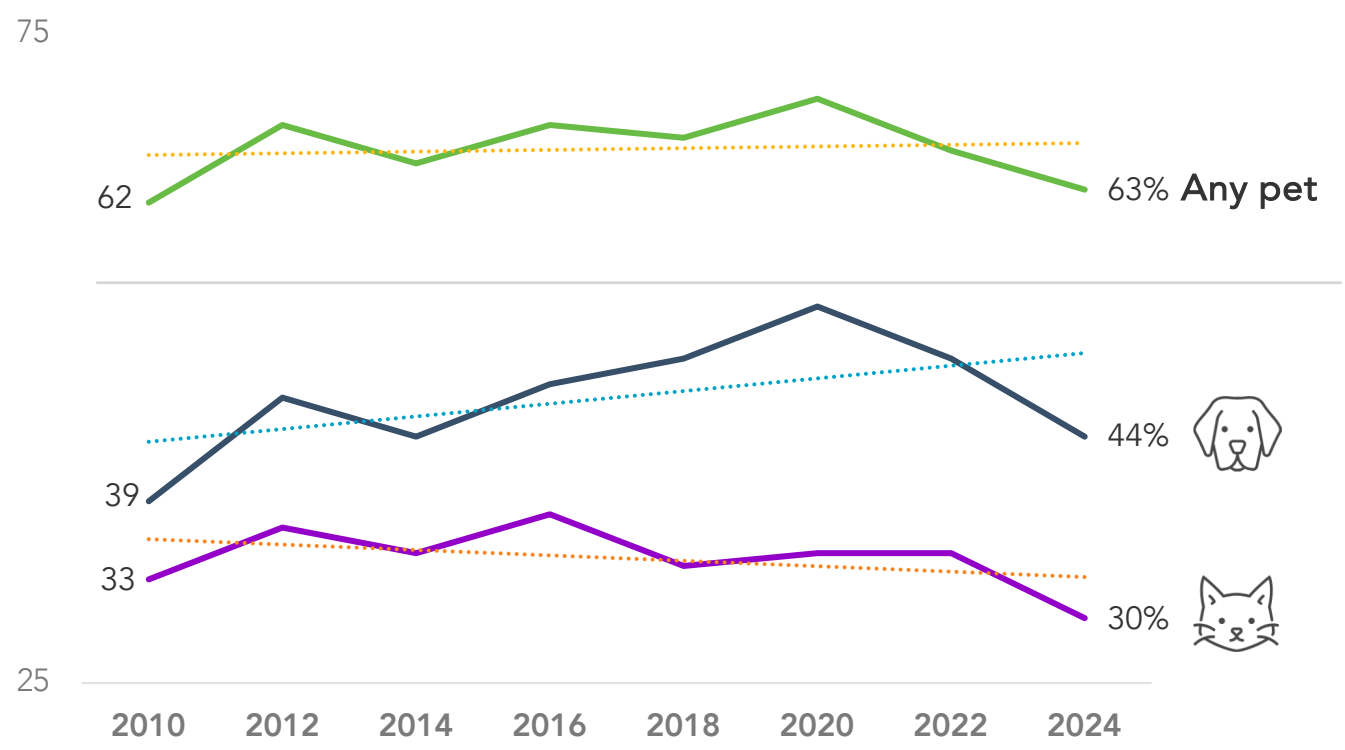
## Industry Economic Contribution Explained

The pet industry is thriving despite global economic uncertainty and inflation. A study by Michigan State University asserts that the U.S. pet industry had a \$303 billion overall contribution to our economy in 2023. Additional 2023 economic impact estimates include:

- Total annual household expenditures on pets, pet services, and pet products amounted to \$109 billion.
- The U.S. pet industry contributed \$217 billion in annual gross domestic product (GDP).
- About 2.7 million U.S. jobs were directly or indirectly attributed to expenditures on pets, with an associated \$140 billion in personal earnings.
- The direct and secondary effects of the pet industry generated a total of \$21.7 billion in annual tax revenue.

**Pet ownership levels have remained steady (mid-to-high 60's) in the American household since 2010. While our industry did experience large gains as a result of COVID closures and working from home (WFH), we see trends normalizing back to pre-COVID standards.**

Pet Ownership as a Percentage of U.S. Households (%) – over time

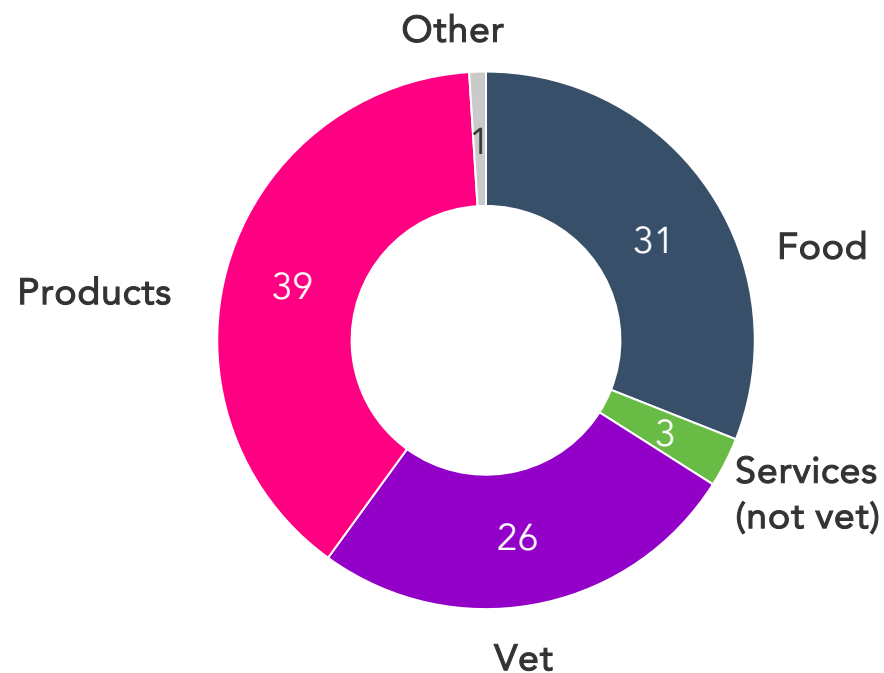
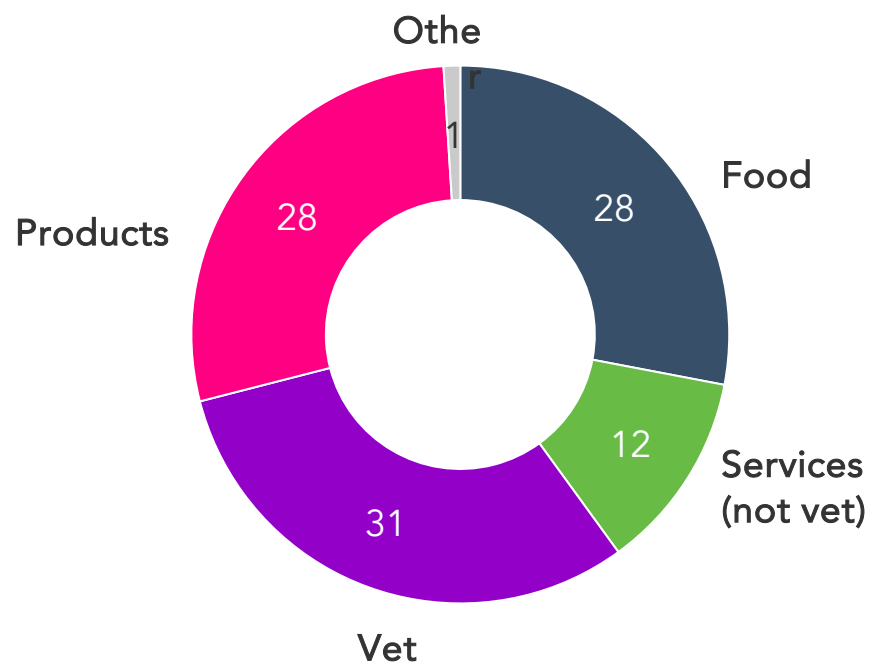


Base 2018: 15000, 2020: 2999, 2022: 15002, 2024: 16575.  
Forecast to 2030 based on ARIMA model method.



## How do dog and cat owners spend money? Veterinary care, pet products\*, and food account for the largest share of dollars spent annually.

Share of Pet Wallet (%) - 2024



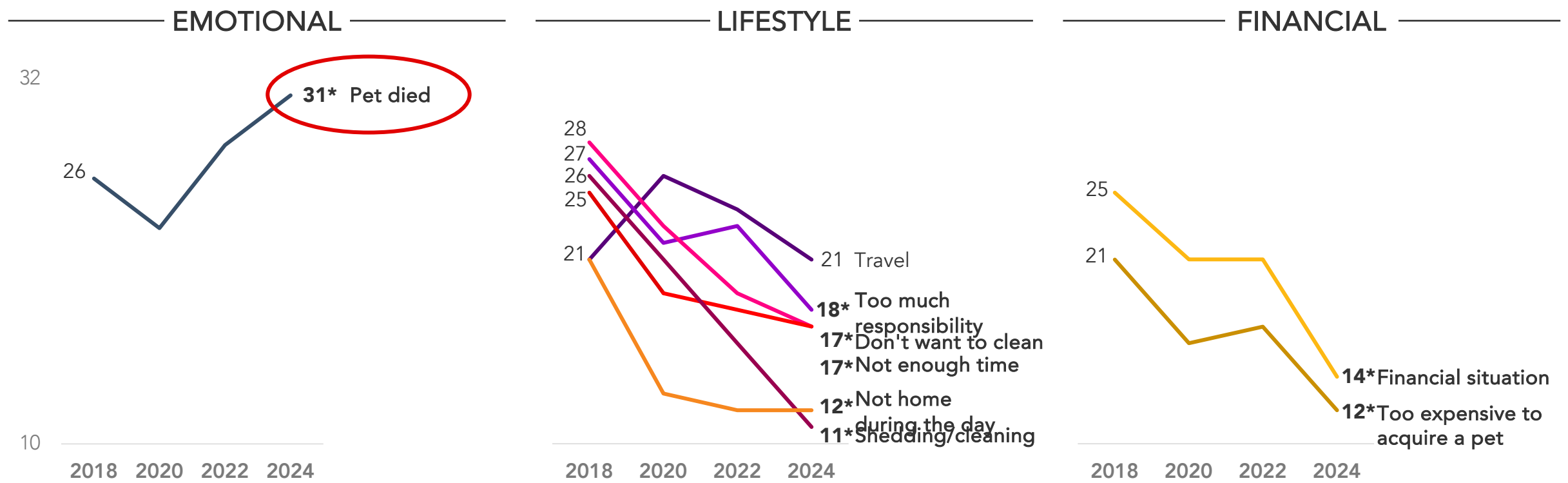
Q334/Q438. In the past 12 months, approximately how much did you spend on your dog/cat(s) for each of the following?

Base Dog/Cat : 2024: 3669/3389.

\*Products = beds, cages/crates, carriers, chews, grooming aids/brushing, harnesses/halters, heartworm meds, leashes, flea/tick meds, non-med collars, other meds, other supplies, shampoo/conditioner, food and water bowls, toys, vitamins/supplements

# Why don't previous pet owners have pets? They say it's because of pet's death and less about lifestyle or financial reasons.

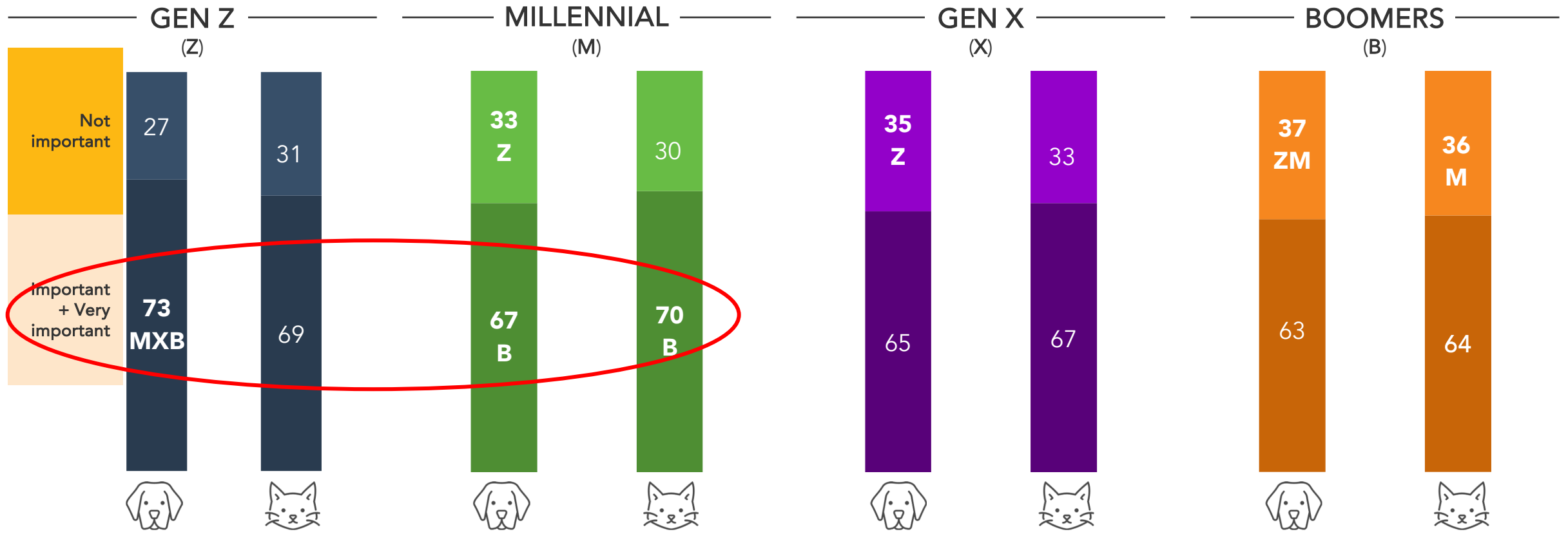
Reasons For Not Currently Owning A Pet Among Previous Pet Owners (%) – over time



\* Significantly different vs. 2018 at a 95% level of confidence  
 QS11. Please indicate why you don't currently own a pet.  
 Base 2018: 3046, 2020: 516, 2022: 3297, 2024: 3765.

# Brand Matters. Brand names are much more important to Gen Zs and Millennials than to Boomer pet owners, which makes branding a big opportunity for strategy and marketing departments.

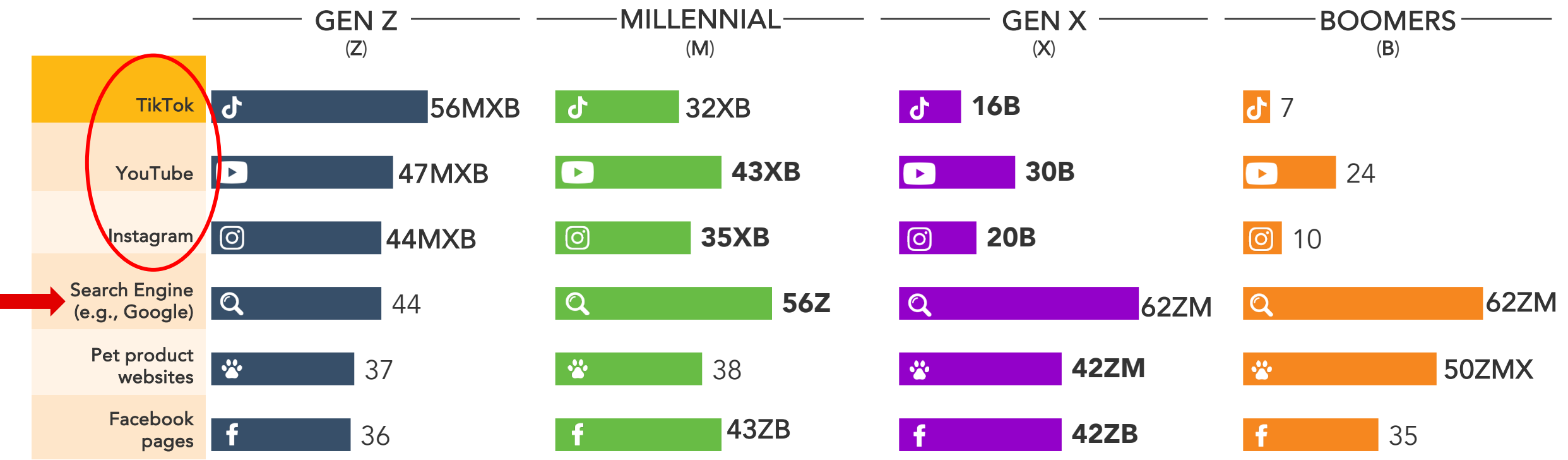
Importance of Brand Name When Purchasing Pet Products (%) - 2024



Letters indicate statistical significance at a 95% level of confidence within corresponding species group Q333d/437d. How important is the brand name when purchasing products for your pet? Base Dog/Cat Gen Z: 538/471, Gen M: 1237/1178, Gen X: 871/821, Boomers: 1085/990

# Gen Zs learn about new pet products on TikTok, YouTube, and Instagram – all visual platforms. All other generations use search engines.

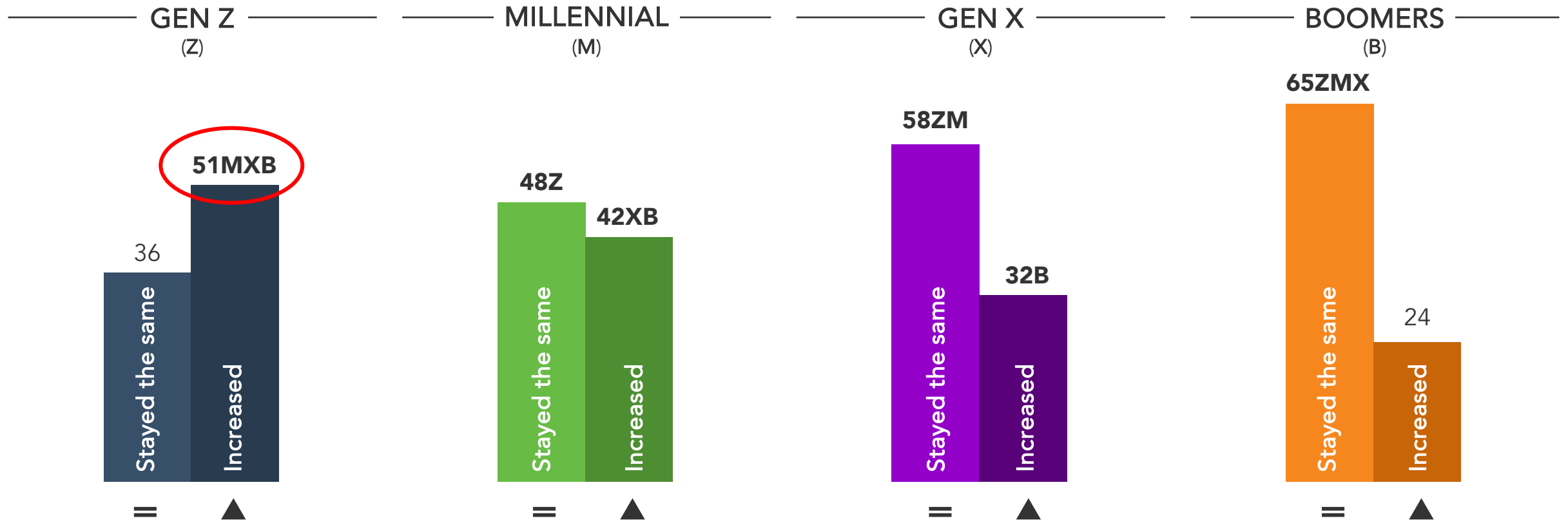
How A Pet Owner Learns About Pet Products On The Internet (%) - 2024



Letters indicate statistical significance at a 95% level of confidence  
 QS5b. Which of the following do/did you use to learn about pet products on the Internet?  
 Base Gen Z: 1099, Gen M: 2181, Gen X: 1602, Boomers: 1080.

# Gen Z increased the number of pet products purchased online over the past year. All other pet owners' online purchases stayed the same.

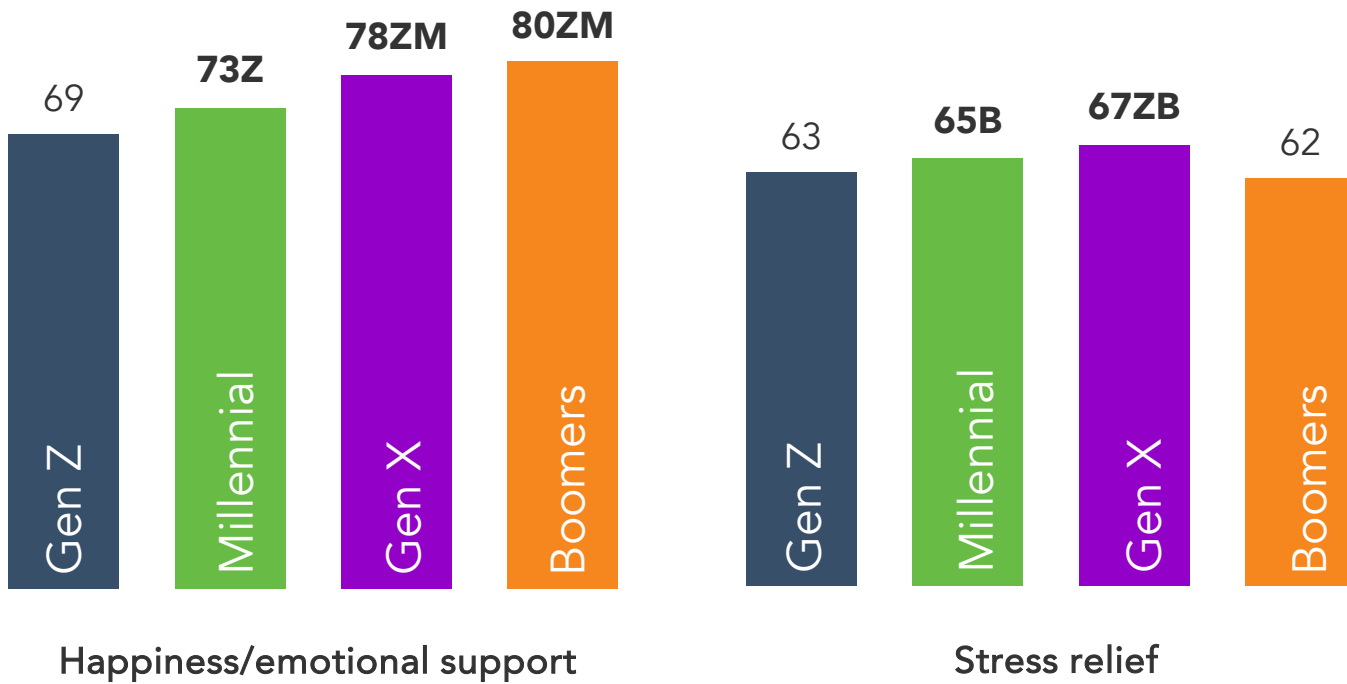
Change In The Number Of Online Purchases In The Past Year (%) – 2024 (versus 2023 purchases)



Letters indicate statistical significance at a 95% level of confidence  
QS6c. How has the number of times you purchased pet products online changed in the past year?  
Base Gen Z: 1459, Gen M: 2970, Gen X: 2537, Boomers: 2220.

# The benefits of owning pets are salient to pet owners across generations.

Specific Health Benefits of Pet Ownership (%) - 2024



Letters indicate statistical significance at a 95% level of confidence  
QS7. What are the specific health benefits, if any, you feel you gain from having a pet?  
Base Gen Z: 1459, Gen M: 2970, Gen X: 2537, Boomers: 2220.



# STATE OF THE INDUSTRY 2024

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**Ingrid Chu**

VP RESEARCH & INSIGHTS

CONNECT WITH US

[research@americanpetproducts.org](mailto:research@americanpetproducts.org)

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