



TOTAL  
All countries

# TGM Global Pet Care Survey 2023

The world's largest independent survey detailing consumer behavior in Pet Care



# Table of contents:



Click on the image to jump directly to the specific section of the report.

# About the survey:

TGM Research embarks on a worldwide exploration, surveying 40 countries to unravel the fascinating realm of petting care behavior.

**40**

countries studied

**15,000+**

consumers asked



**Schedule:**

01st October - 17th October, 2022



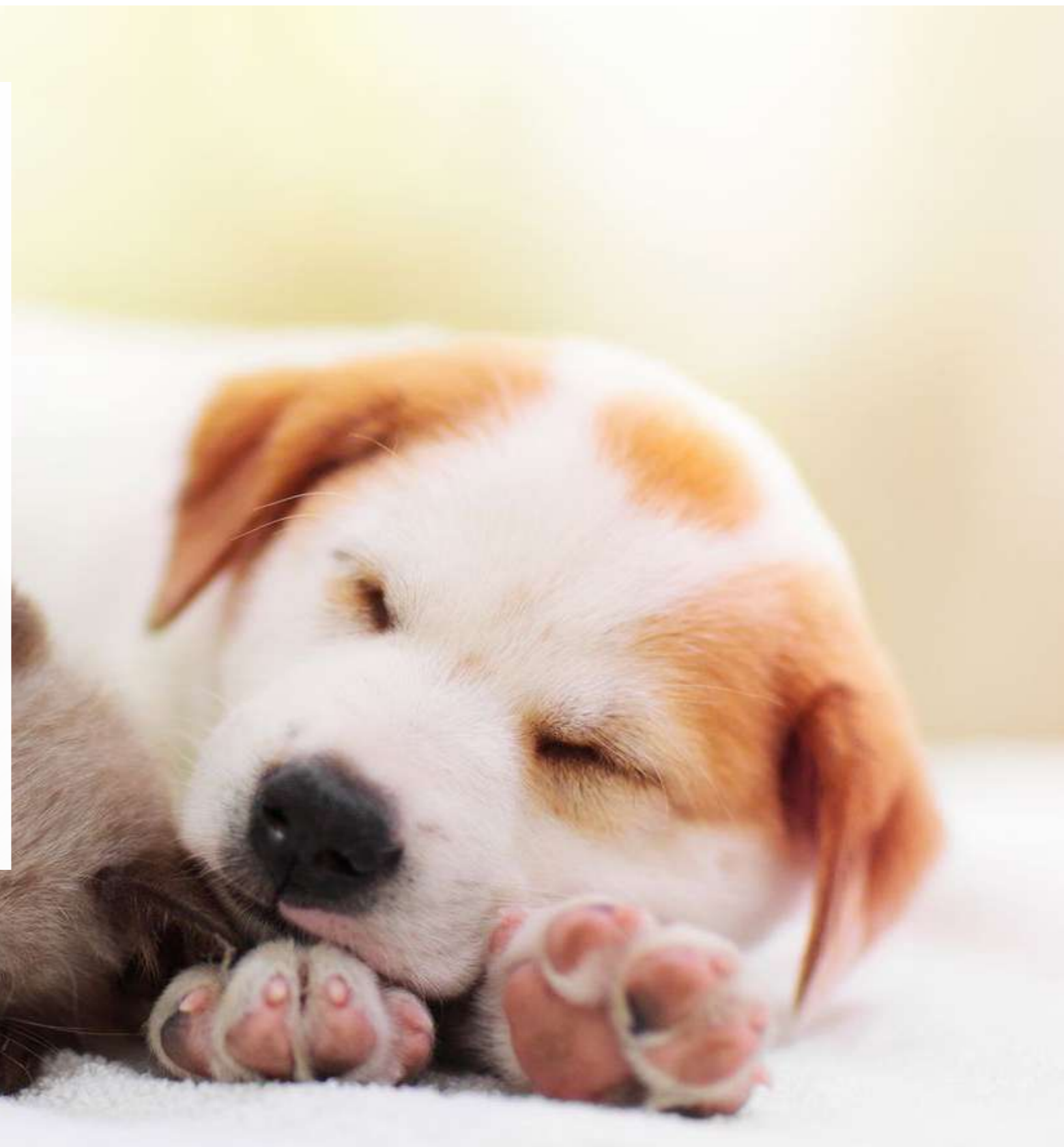
**Sample:**

a representative sample of N = 15,000+ of surveyed countries, age: 18-64



**Methodology:**

Internet interviews (CAWI), research project was entirely conducted by TGM Research




# Pet Care 2023: Data Pill

**TOTAL**









## Pets ownership:

 **58%**  
of people surveyed own pets

## No. of pets owned:

**46%** owns 1 pet  
**27%** owns 2 pets  
**12%** owns 3 pets  
**14%** owns at least 4 pets

## Kind of pets owned:

 **59%** have dog  
 **53%** have cat  
 **9%** have fish  
 **5%** have parrot  
 **4%** have rabbit  
 **3%** have turtle

## Pet care services used:

**67%** Veterinarian  
**23%** Groomer  
**10%** Pet training/behaviourist

## Channels for pet food purchase:

**46%** Supermarkets  
**28%** Independent pet store/small pet chain  
**21%** Online

## Top 3 used pet food brands:

 **16.7%**  
 **15.4%**  
 **12.7%**



# Pet Care: Attitude & Behavior

What is the level of interest in pets?

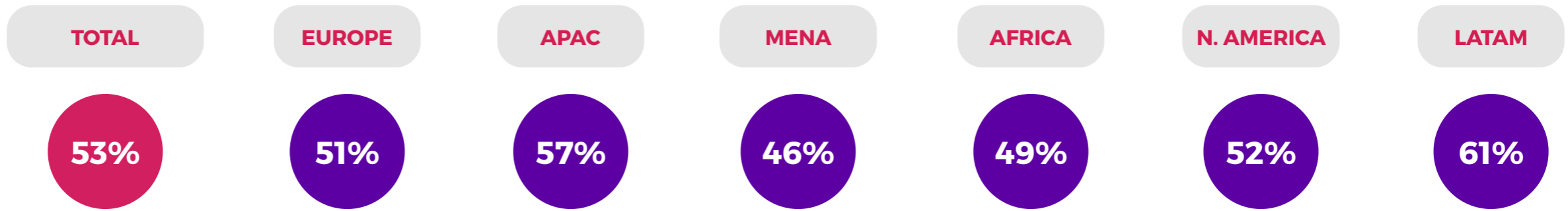


# Dogs and cats are the most popular pets worldwide




## Global results.



% of people own at least 2 pets



What kinds of pets do people personally have?

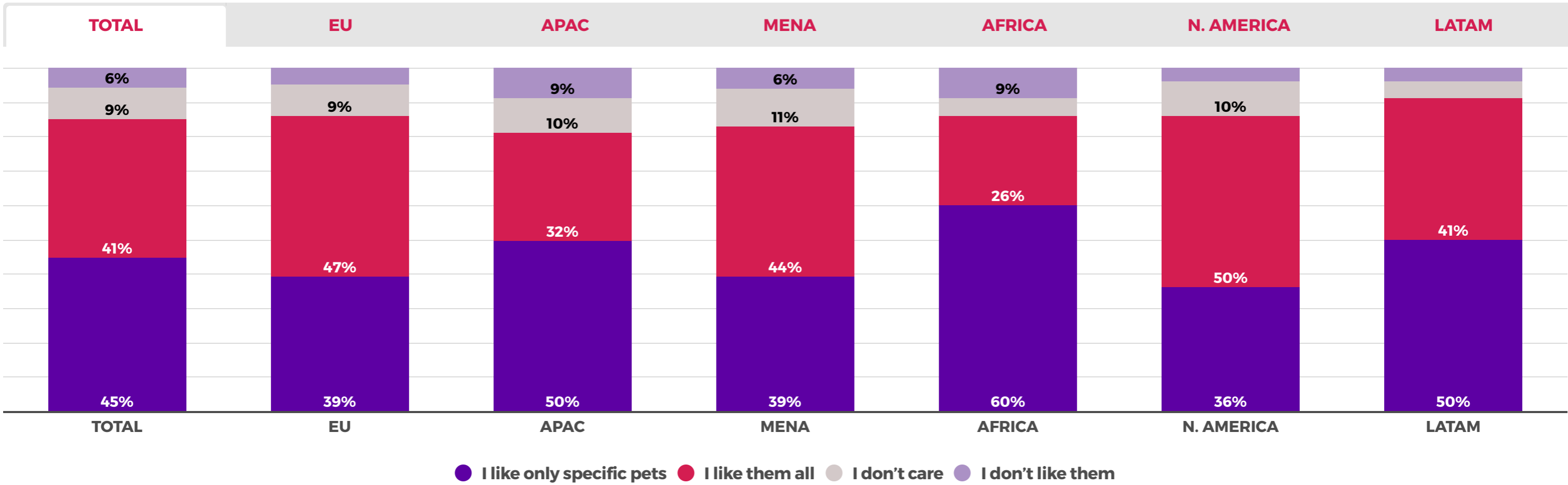
	59%	60%	55%	29%	71%	66%	79%
	53%	53%	55%	63%	48%	52%	46%
	9%	8%	15%	14%	5%	5%	5%

# What is the attitude towards pets:

## Regional focus: **TOTAL**



What is your attitude towards pets? (%)



Q: 'What is your attitude towards pets' - TOTAL N=15031

# What is the attitude towards pets:

## Age and Gender differences - **TOTAL**



**58%**

of people in all countries surveyed own pet



**59%**

of pet owners all countries surveyed own dog as their pet



**53%**

of people all countries surveyed own cat as their pet



**9%**

of people all countries surveyed own fish as their pet

Q: 'What kind of pets do you have personally' - TOTAL N=8664

### What is your attitude towards pets? (%)

TOTAL	EU	APAC	MENA	AFRICA	N. AMERICA	LATAM		
		18-24 yo	25-34 yo	35-44 yo	45-54 yo	55-64 yo	Male	Female
I like them all		43%	42%	39%	39%	40%	38%	44%
I like only specific pets		44%	45%	45%	45%	44%	45%	44%
I don't like them		5%	6%	7%	7%	6%	6%	6%
I don't care		7%	7%	9%	9%	10%	11%	6%

Q: 'What is your attitude towards pets' - TOTAL N=15031

The relationship between humans and their beloved animal companions has experienced a remarkable transformation. Pets have become cherished companions, offering unwavering companionship and support to a significant extent.

Our findings indicate that an impressive 58% of respondents all countries surveyed proudly call themselves pet owners. Notably, the age group of 18-34 emerges as the most ardent pet enthusiasts, aligning perfectly with the endearing nickname bestowed upon them as the "pet parent" generation.



# Veterinarians are the most utilized pet services.

## Regional focus: **TOTAL**




**53%**  
of people in all countries surveyed own at least 2 pets

Q: 'How many pets do you have' - TOTAL N=8664

As the bond between humans and their pets grows stronger, responsible pet ownership has surged in popularity. The heightened awareness of the numerous health benefits that come with pet keeping has ignited a passionate desire among pet parents to provide their companions with top-tier care.

Within the EU, veterinarians have emerged as the clear favorite among pet owners across all demographic groups. Notably, the most responsible segment lies within the age group of 55 to 64, with an overwhelming representation of 79% expressing a distinct preference for veterinary check-ups. Groomers ranked as the second most popular service among all pet owners, with a particular significance among the 18-24 age group, making up 20% of their preference.

### Services that people have used for their pet (region):

TOTAL	EU	APAC	MENA	AFRICA	N. AMERICA	LATAM		
		18-24 yo	25-34 yo	35-44 yo	45-54 yo	55-64 yo	Male	Female
Pet training/ behaviourist		12%	13%	10%	7%	6%	10%	9%
Groomer		22%	24%	25%	22%	22%	22%	24%
Pet Massage/ spa		6%	6%	4%	2%	1%	4%	4%
Veterinarian		59%	65%	67%	72%	75%	64%	70%
Pet sitter/ walker		9%	9%	6%	5%	4%	7%	6%
Pet dietitian		8%	8%	6%	3%	2%	7%	5%
Pet hotel		5%	5%	6%	4%	3%	5%	5%
None of the above		24%	19%	21%	21%	19%	23%	19%

Q: 'Which of the listed services have you used for your pet' - TOTAL N=8664





# Pet Breed

Which pet breeds are the most common?



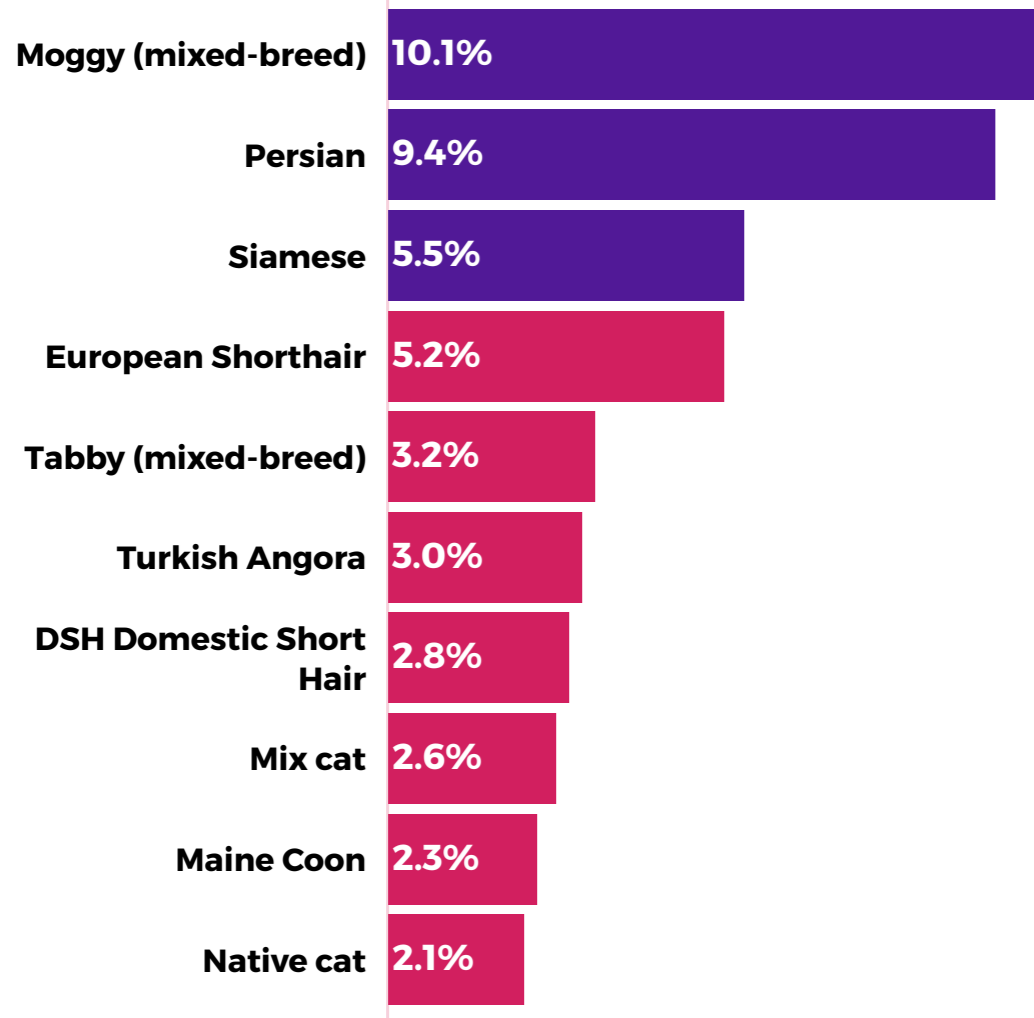
# Moggy is the most popular cat breed

## TOTAL



### What is the breed of your cat?

(All countries, Top10):



Moggy



Persian



Siamese



European Shorthair



Tabby (mixed-breed)



Turkish Angora

Q: 'What is the breed of your cat(s)? - TOTAL N = 4363

# Most popular cat breed across regions

EUROPE

APAC

MENA

AFRICA

N. AMERICA

LATAM

1



European Shorthair



Persian



Persian



Moggy



Moggy



Moggy

2



Moggy



Moggy



Siamese



Maine Coon



Tabby (mixed-breed)

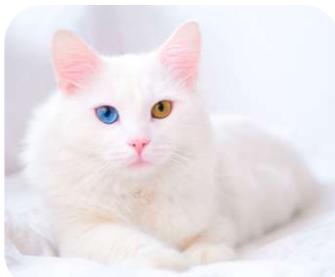


Siamese

3



Persian



Turkish Angora



Tabby (mixed-breed)



Persian



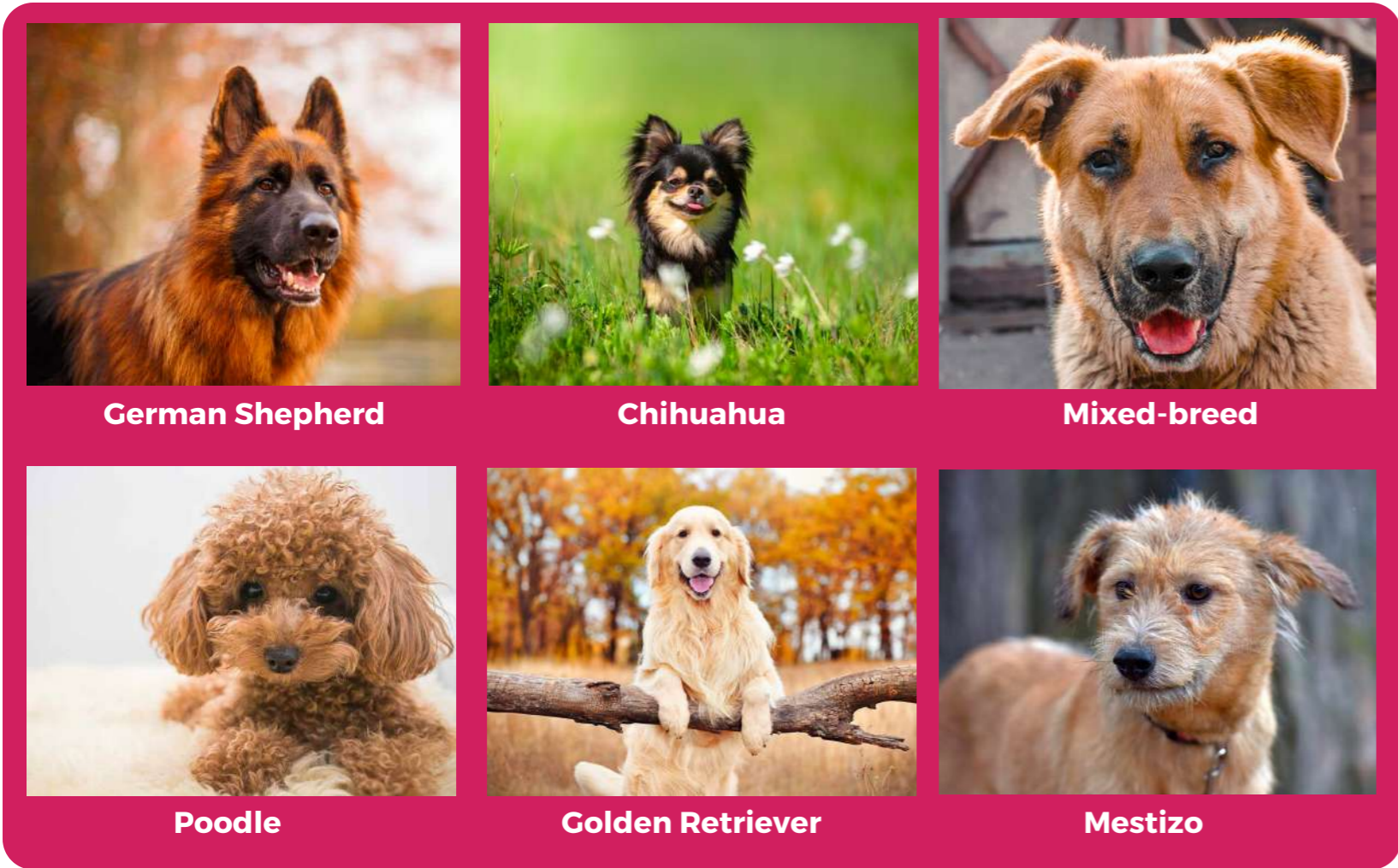
DSH Domestic Short Hair



Mixed-breed

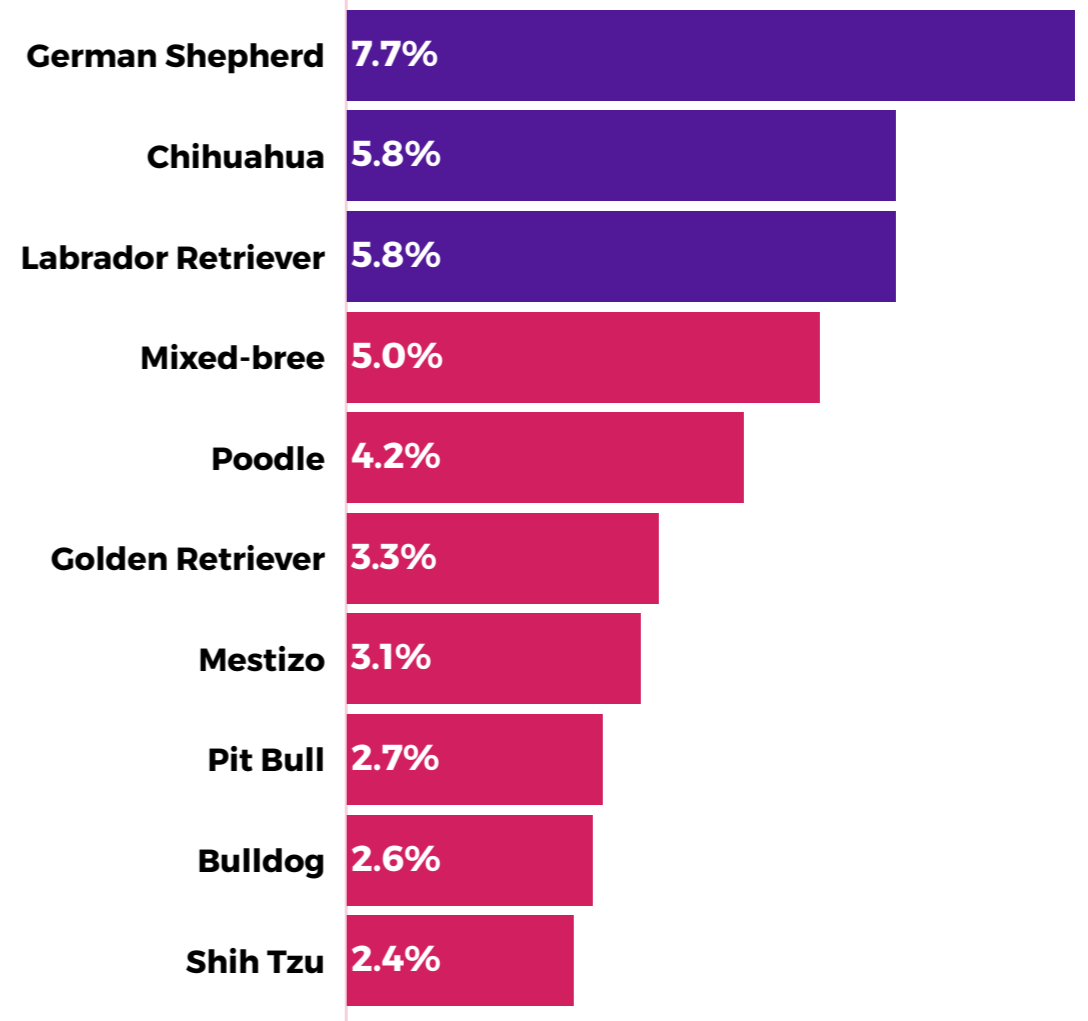
# German Shepherd is the most popular dog breed

TOTAL



## What is the breed of your dog?

(All countries, Top10):



Q: 'What is the breed of your dog(s)? - TOTAL N = 4787

# Most popular dog breed across regions

EUROPE

APAC

MENA

AFRICA

N. AMERICA

LATAM

1



Mixed-breed



Labrador Retriever



German Shepherd



German Shepherd



Chihuahua



Poodle

2



Labrador Retriever



Shih Tzu



Golden Retriever



Mixed-breed



German Shepherd

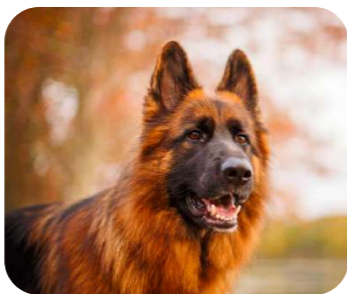


Chihuahua

3



German Shepherd



German Shepherd



Terrier



Chihuahua



Pitbull



Mestizo



# **Pet Food Purchase Behavior**

**How Consumers Shop for Pet Food?**

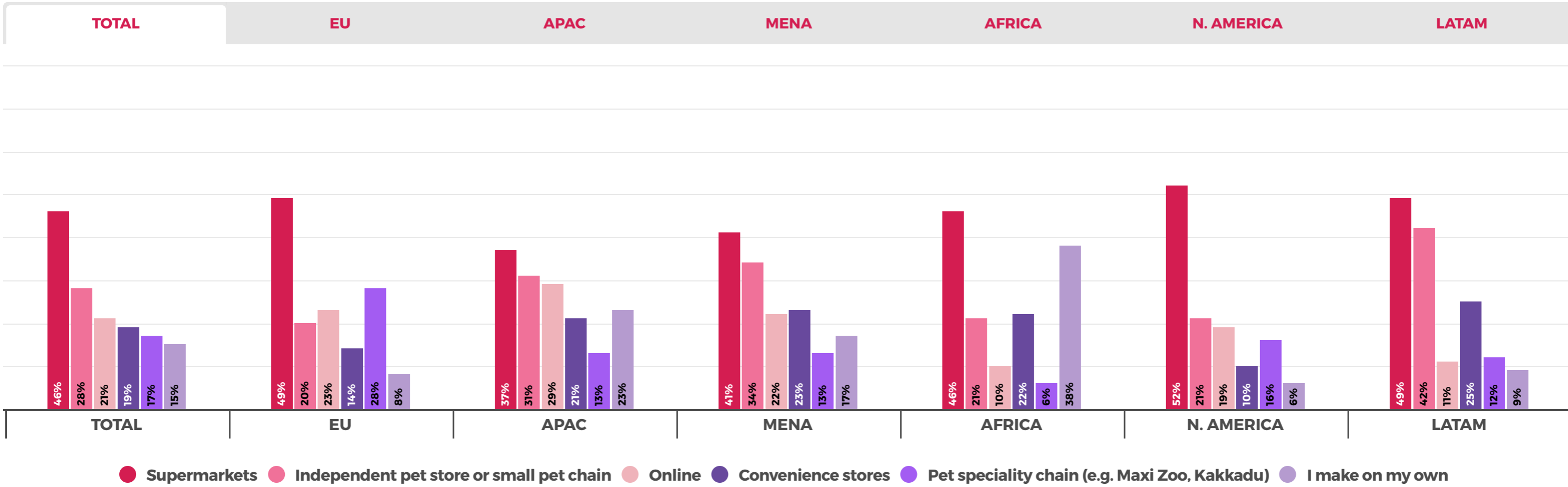


# Supermarkets are generally the most popular channel for purchasing pet food, although preferences vary across countries.

## Regional focus: TOTAL



Where do you usually purchase pet food? (%)



Q: 'Where do you usually purchase pet food' - TOTAL N=8664



# Driving Factors in Pet Food Purchases: Quality and Price

Regional focus: **TOTAL**



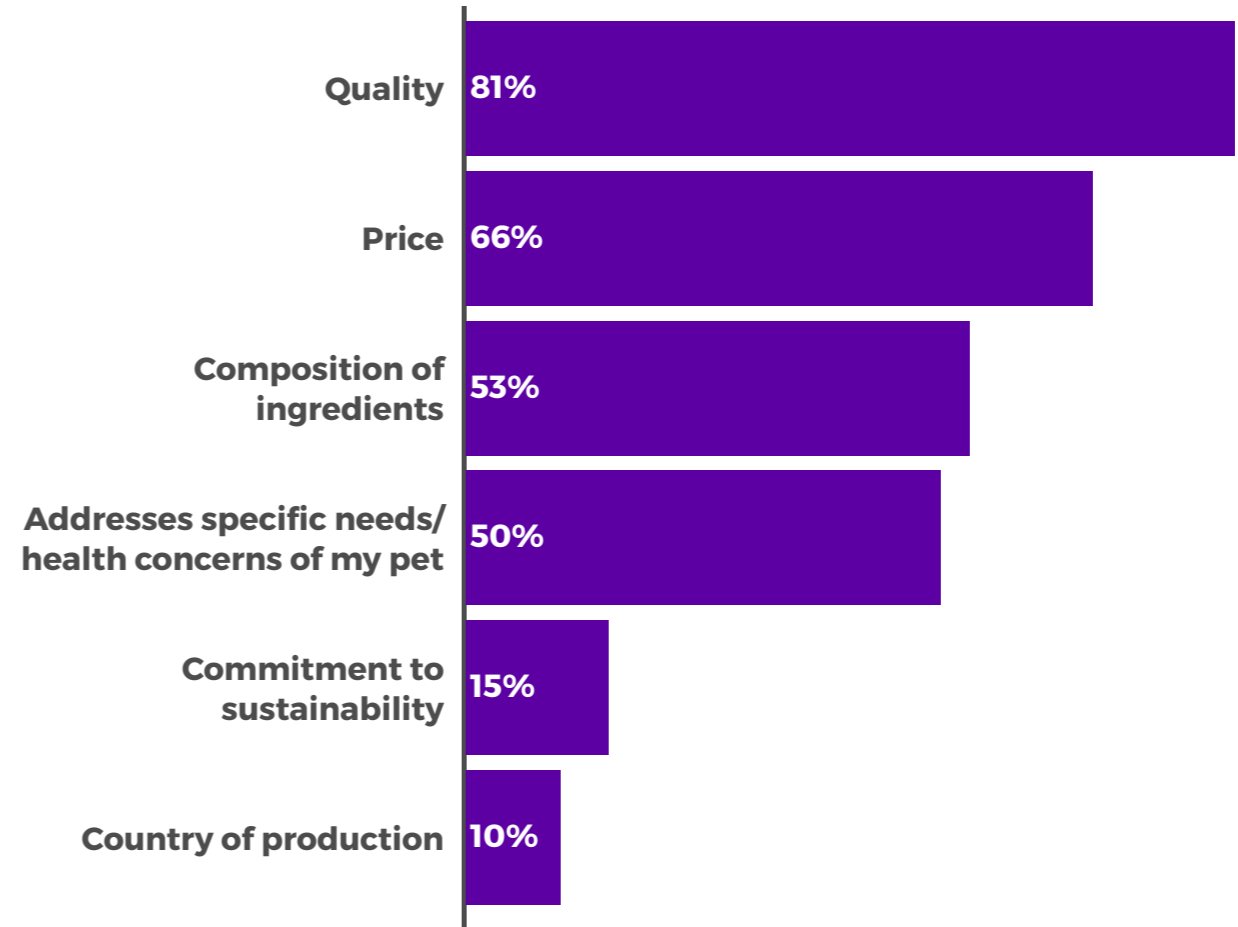
Pet food purchase channels (%)

< TOTAL >



Q: 'Where do you usually purchase pet food' - TOTAL N=8664

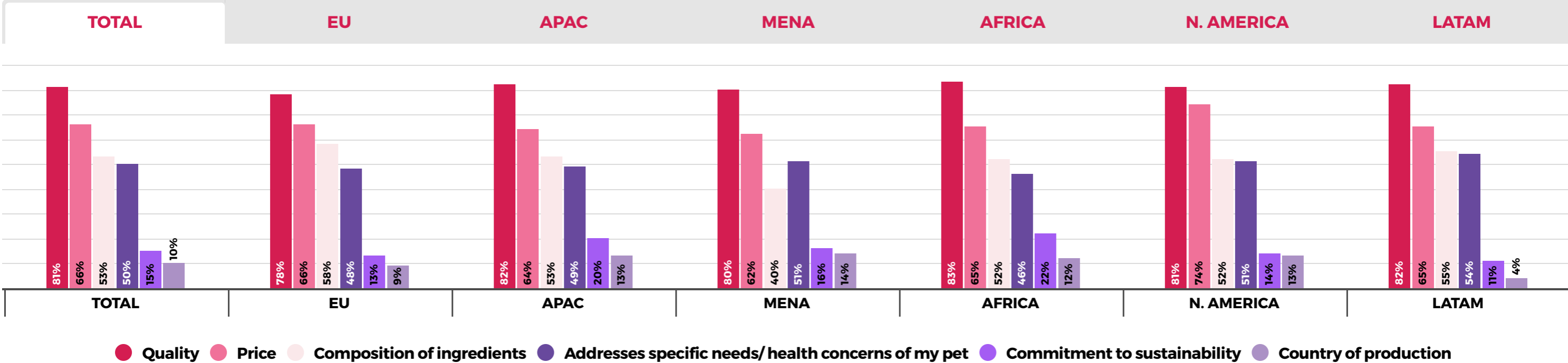
Important factors while buying pet food (%)



Q: 'Indicate the 3 most important factors for you while buying pet food' - TOTAL N=8664

# Key factors for pet food purchase:

## Regional focus: TOTAL



In the present day, pets hold a special place in the hearts of families, being cherished and cared for as valued members of the household. This deep affection has led to a heightened focus on ensuring the highest quality of food for their beloved pets. With a growing concern for nutritional value and other side-effects, owners are now more conscious than ever about what pet food products they purchase.

In a holistic view, among the multitude of factors influencing pet food purchasing decisions, quality stands out as the foremost concern, as evidenced by a resounding 81% of respondents prioritizing it. Price and ingredient composition ranks second and third with 66% and 53% of agreed respondents, respectively. The Middle East and North Africa (MENA) region stands out as an exceptional case where pet owners prioritize products that address the specific needs and health concerns of their beloved companions above the sole consideration of ingredient composition.

Q: 'Indicate the 3 most important factors for you while buying pet food' - TOTAL N=8664



# Pet Food Brands

Which pet food brands are the most known?



# Which pet food brands are the most known?

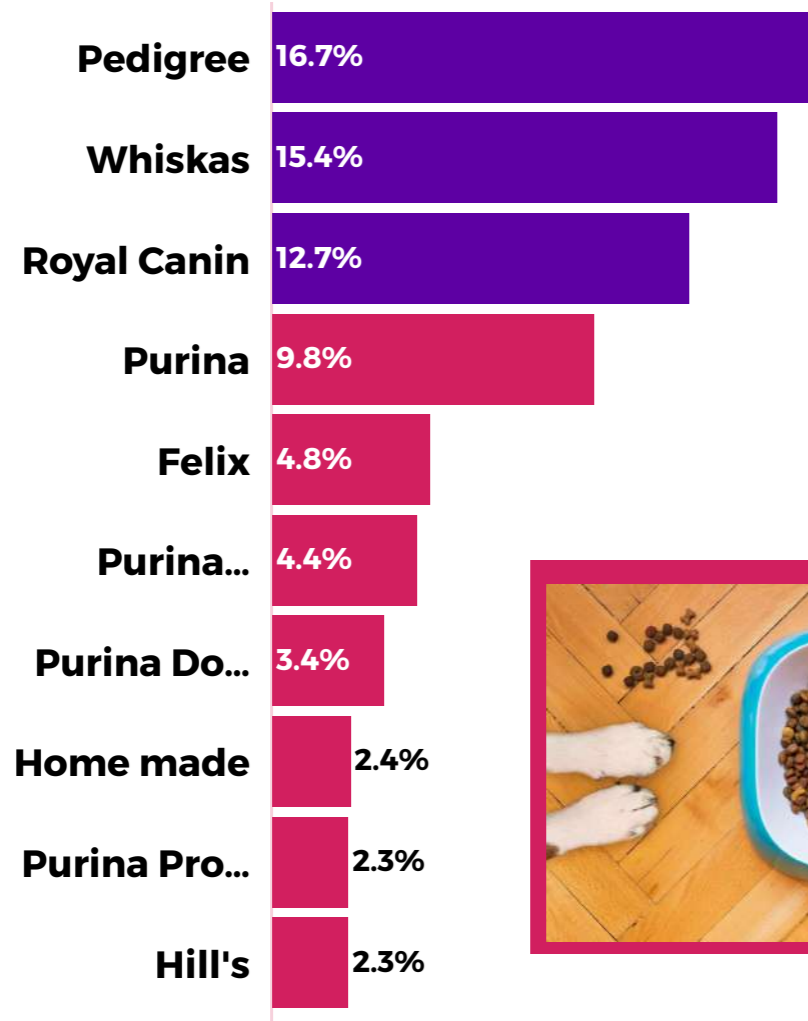
## TOTAL

TOTAL



### What are your favorite pet food brand?

(All countries, Top10):



The choice of appropriate sustenance for cherished companions continues to be a matter of utmost importance for pet guardians. The competition among pet food brands is fierce, with each vying to capture the hearts and stomachs of our pets. Some brands have successfully solidified their positions as renowned entities, exemplifying trustworthiness, excellence, and groundbreaking advancements in their offerings. On a global scale, Pedigree stands as the most relied-upon pet food brand (17%), closely trailed by Whiskas (15%) and Royal Canin (13%).

Q: 'What are the top 3 brands of pet food that you usually feeding your pet?' - TOTAL N = 7773

# Which pet food brands are the most known?

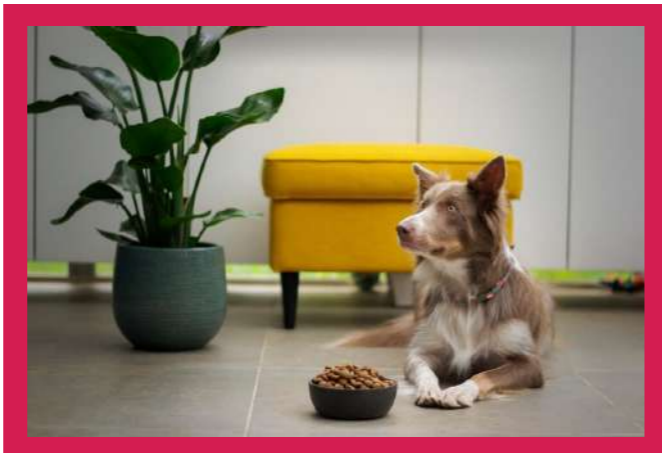
## Regional focus: TOTAL



What are the top pet food brands that you usually feeding your pet? (Region, Top5):

	TOTAL	EU	APAC	MENA	AFRICA	N. AMERICA	LATAM
1st	Pedigree	Whiskas	Pedigree	Fish	Home made	Purina	Pedigree
2nd	Whiskas	Pedigree	Whiskas	Royal Canin	Royal Canin	Pedigree	Purina Dog Chow
3rd	Royal Canin	Royal Canin	Royal Canin	Whiskas	Pedigree	Iams	Whiskas
4th	Purina	Purina	Me-O	Home made - meat	Bobtail	Purina Friskies	Purina
5th	Felix	Felix	Purina	Felix	Whiskas	Blue Buffalo	Royal Canin

Q: 'What are the top 3 brands of pet food that you usually feeding your pet? - TOTAL N = 7773



Preferences for pet nutrition vary across different regions and countries, as pet owners have distinct inclinations when it comes to selecting the optimal sustenance for their cherished animal companions. While some individuals opt for homemade meals, carefully preparing food for their pets, others lean towards commercially branded pet foods. The choice ultimately depends on the personal preferences, beliefs, and priorities of pet owners in each respective region or country. On a global scale, Pedigree stands as the most relied-upon pet food brand, closely trailed by Whiskas and Royal Canin.



# Appendix: Methodology

Methodological notes about the  
TGM Global Pet Care Survey 2023



# About TGM Global Pet Care 2023 Project

The survey was carried out between the 01st October - 17th October, 2022, using the method of online interviews in 40 countries on a nationally representative sample.

The sample is a representative population of the given countries in terms of gender and age (details below).



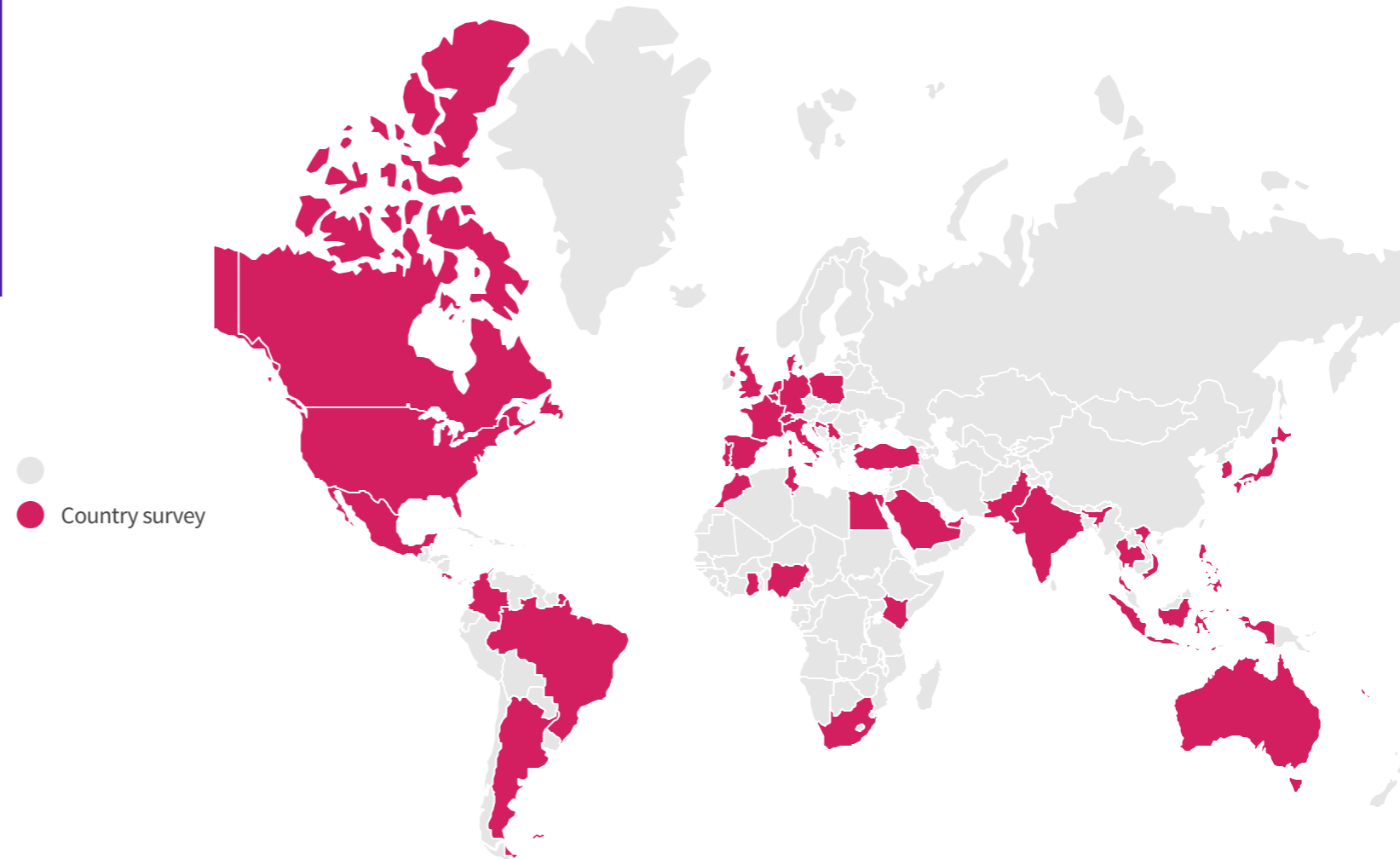
**Schedule:** 01st October - 17th October, 2022



**Sample:** a representative sample of N = 15,000+ of surveyed countries, age: 18-64



**Methodology:** Internet interviews (CAWI), research project was entirely conducted by TGM Research



# About TGM Global Pet Care 2023 Project

	Belgium	Croatia	Denmark	France	Germany	Italy	Netherlands	Poland	Portugal	Serbia	Spain	Switzerland	England	Wales	Region Total
POPULATION	11M	4M	6M	67M	83M	60M	17M	38M	10M	7M	47M	9M	67M	3M	430M

SAMPLE SIZE	366	386	254	447	442	454	300	525	404	346	416	185	458	244	4984
DEMOGRAPHIC	18-64														

	Australia	India	Indonesia	Japan	Pakistan	Philippines	South Korea	Thailand	Vietnam	Region Total
POPULATION	25M	1.4B	271M	126M	217M	108M	52M	70M	96M	965M




SAMPLE SIZE	278	312	413	521	319	362	266	319	294	3085
DEMOGRAPHIC	18-64	18-64	18-64	18-64	18-54	18-64	18-54	18-54	18-54	








	Ghana	Kenya	Nigeria	South Africa	Region Total
POPULATION	32M	57M	220M	59M	368M

SAMPLE SIZE	370	345	462	406	1583
DEMOGRAPHIC	18-44				



# About TGM Global Pet Care 2023 Project

	Canada 	USA 	Region Total 
POPULATION	38M	328M	366M
SAMPLE SIZE	419	503	922
DEMOGRAPHIC	18-64		

	Egypt 	Morocco 	Saudi Arabia 	Tunisia 	Turkey 	UAE 	Region Total 
POPULATION	107M	38M	34M	12M	83M	10M	279M
SAMPLE SIZE	454	507	388	207	431	415	2401
DEMOGRAPHIC	18-64	18-54	18-54	18-64	18-64	18-54	

	Argentina 	Brazil 	Colombia 	Costa Rica 	Mexico 	Region Total 
POPULATION	45M	211M	50M	5M	128M	492M
SAMPLE SIZE	392	395	368	271	387	1813
DEMOGRAPHIC	18-64	18-64	18-64	18-54	18-64	



# About TGM Research





**TGM Research (TGM) is a technology-driven market research company specialising in global online data collection and innovative survey technology.**

**TGM provides agile insights for better decisions, using the most comprehensive Res-Tech to spearhead the use of digital for better market research. TGM is a remote-first company with a team of 50+ members, having a presence on five continents.**



# Agile Research for Better Decisions

3 billion people in 130+ countries at your fingertips

