

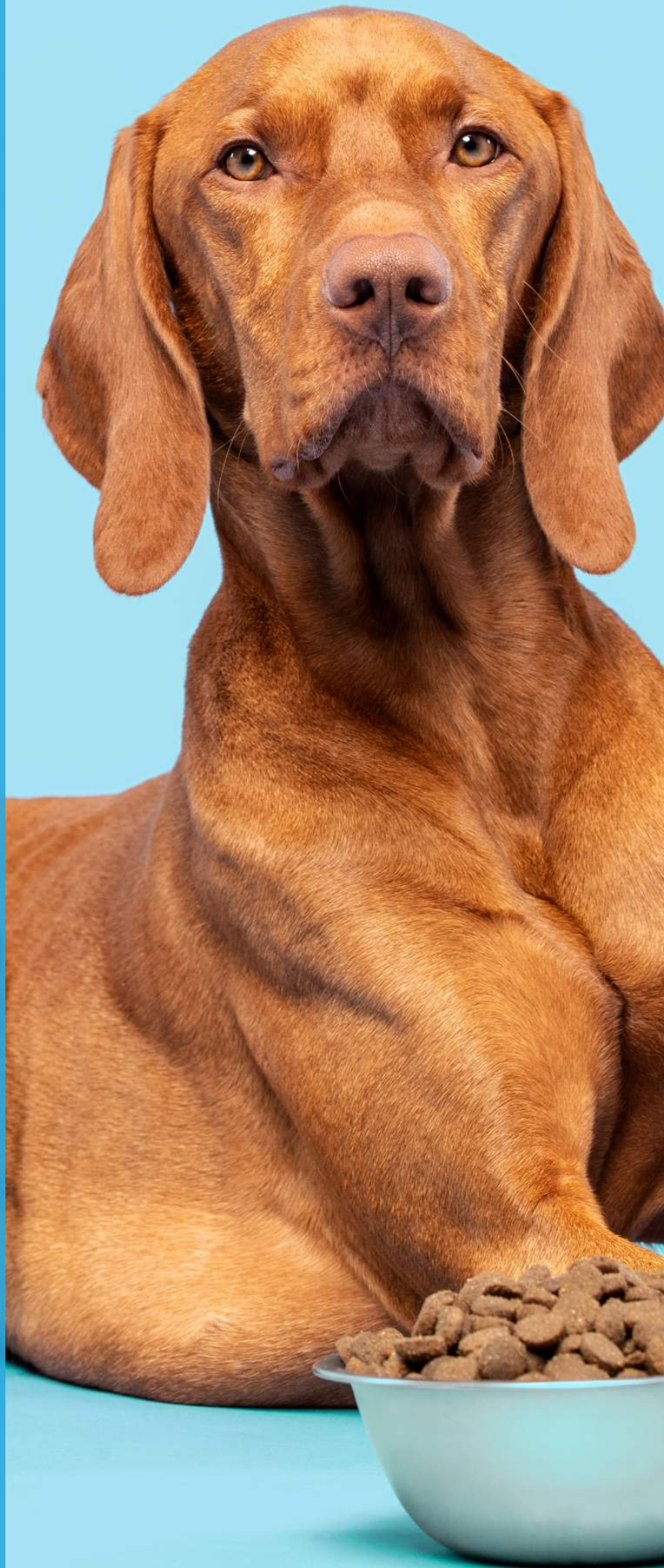
# PET INDUSTRY RESEARCH REPORT

## DOG FOOD

Owner preferences,  
buying behavior and  
other exclusive insights

### **SURVEY RESULTS**

by GlobalPETS & Yummypets



# Dog nutrition - Survey results

This study provides a broad and insightful analysis of how pet consumers view dog nutrition and what their feeding and purchasing behaviors are.

We partnered up with pet social network, [Yummypets](#), to better understand the diverse perspectives of pet owners from five countries: the United States, France, the United Kingdom, Belgium, and Canada.

This study shows the perspective of 1,427 pet owners:

- 27.6% from the United States
- 23.9% from France
- 18.8% from the United Kingdom
- 16.7% from Belgium
- 13% from Canada.

[1. Dry vs. wet food](#)

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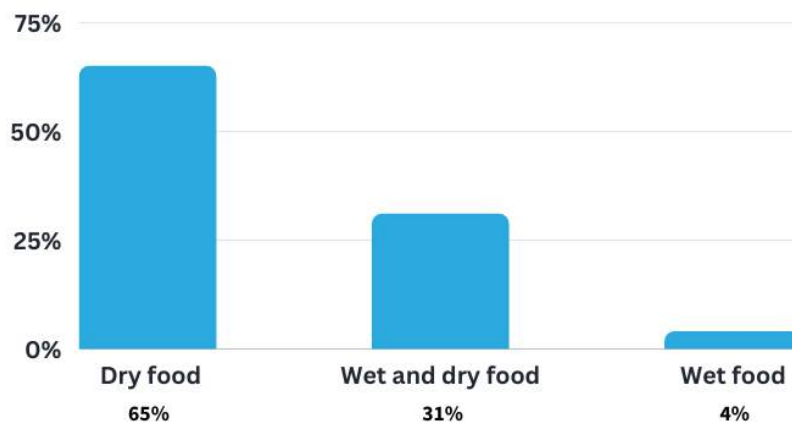
[9. Health focus](#)

## 1. Dry vs. wet food

As we look into what pet owners feed their furry friends, we discover a wide range of choices. Most people, about 65%, prefer dry food (kibble) to feed their dogs.

Interestingly, a significant 31% like to offer a mix of wet and dry food, giving their dogs the best of both worlds. On the other hand, a smaller group, around 4%, go for the tasty appeal of wet food (canned or in trays).

### What do you feed your dog?



GlobalPETS | [www.globalpetindustry.com](http://www.globalpetindustry.com)

Source: Yummypets

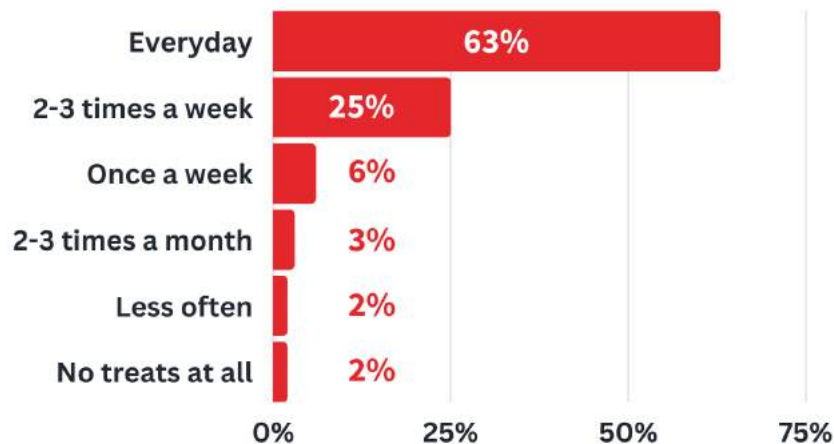
Breaking this down per country, it is interesting to see that the French and Canadians have a stronger preference for dry dog food, with 83% and 75%, respectively.

Moreover, the UK leans more towards the mixed feeding approach, with 56% of respondents choosing to combine wet and dry food for their pets.

## 2. Treating behavior

Treats are more than just a tasty snack for dogs; they symbolize affection and rewards, which play a crucial role in creating and strengthening the bond between them and their owners. Our survey has uncovered some interesting insights about how often treats are used.

### How often do you treat your dog?



GlobalPETS | [www.globalpetindustry.com](http://www.globalpetindustry.com)

Source: Yummypets

The majority of our respondents (63%) admit that they give treats to their dogs every single day. Especially puppies tend to get daily treats, because of the extra attention and training needed during the early stages of life.

On the other hand, 25% of our respondents like to take a more moderate approach towards giving treats. They chose to treat their dogs 2 to 3 times a week. This approach is quite thoughtful and ensures that treats are considered a special reward rather than overindulging in them.

A smaller group of respondents (6%) give treats to their dogs once a week, and even a smaller percentage (3%) does it 2-3 times a month. This can be due to owners caring about their dogs' healthy diets and not overfeed them.

Lastly, 2% of our respondents chose to not give their dogs any treats.

Among all nations, the UK stands out as the one that treats dogs the most often, with an impressive 75% of the respondents giving their furry friends daily treats.

### 3. Feeding behavior

#### *Frequency*

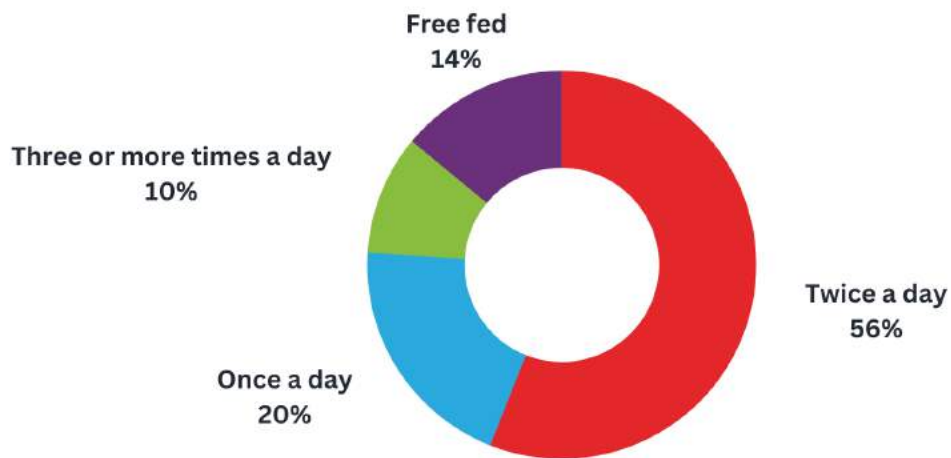
“How often should I feed my dog?” is a common question that arises often among dog parents.

Our respondents have different points of views in this regard: 20% of them like to keep it simple by giving their dogs only one meal per day. While 56% like to split their dog’s meal and feed them twice a day.

10% take it a step further and feed their dogs three or more times per day. Lastly, 14% of our dog owner respondents, decided to give their dog the freedom to eat whenever they want, by free feeding them.

The biggest difference is noticed in this regard with two countries: 19% of US respondents and 20% of Belgium respondents chose the concept of free feeding, granting their dogs the liberty to satisfy their hunger at their own pace.

#### **How often do you feed your dog?**



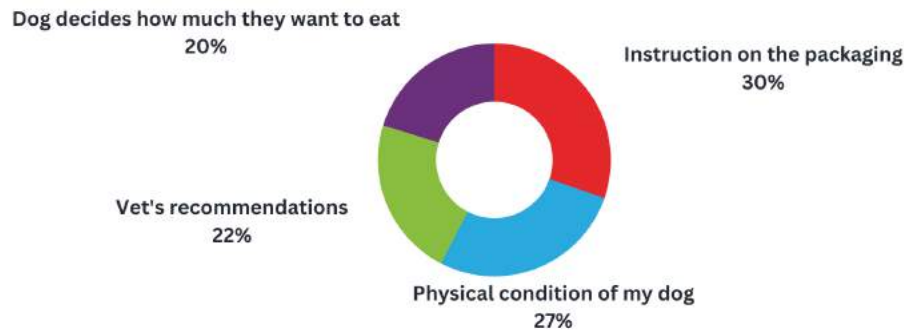
GlobalPETS | [www.globalpetindustry.com](http://www.globalpetindustry.com)

Source: Yummypets

## Quantity

The other common feeding question is around how much to feed a dog. 30% of our respondents decide to follow the clear guidelines printed on the packaging. Others (27%) are more intuitive and feed their dog's based on their physical condition, adjusting the quantity based on how their dog looks.

### How do you decide how much to feed your dog?



GlobalPETS | [www.globalpetindustry.com](http://www.globalpetindustry.com)

Source: Yummypets

For 22% of dog owners, the vet's recommendation plays a crucial role in deciding how often to feed their dog. And 20% of the respondents have a totally different approach from the above. They allow their dogs to decide how often they want to eat.

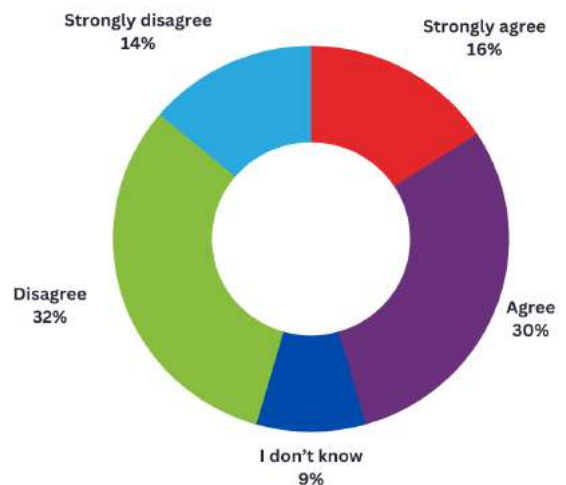
Interesting differences surfaced between different countries: In Belgium, a higher percentage (31%) decide to follow the vet's recommendations on how often to feed their dogs. On the other hand, in the United Kingdom, a smaller percentage (11%) follow their vet's recommendations and instead show more preference to the instructions on the packaging (40%).

## Knowing how much to feed

Almost half of all dog owners find it difficult to know how much to feed their dog: 16% of our respondents strongly agree while 30% somewhat agree with the statement.

32% strongly disagreed and 14% somewhat disagreed, expressing that it is not difficult for them to know how much to feed their dog.

### I find it difficult to know how much to feed:



## 4. Purchasing behavior

Dog owners have their preferred ways of buying food for their furry friends. Many of them (47%) turn to specialized stores and pet retailers to purchase dog food given the fact that these stores usually offer a wider selection of dog food tailored to their needs.

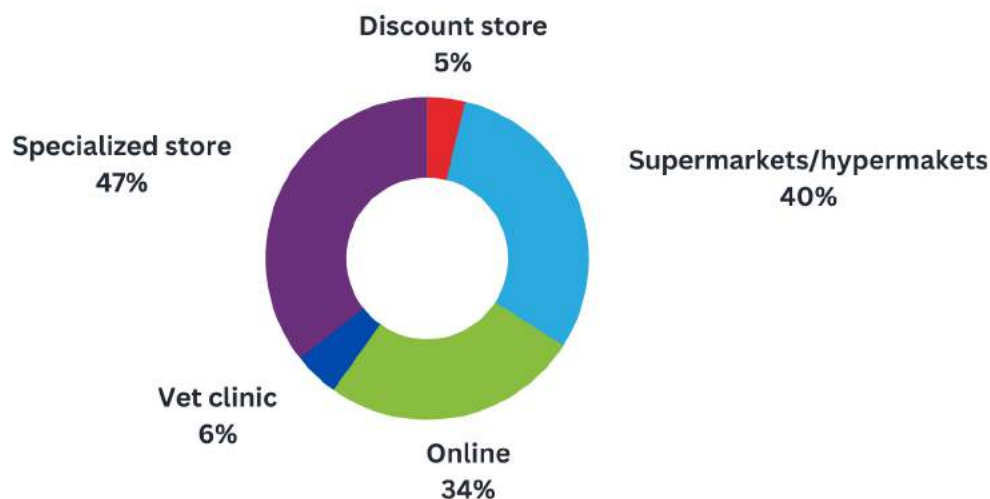
Others (40%) find the convenience of supermarkets and hypermarkets appealing, since they can get their dog food while doing the regular grocery shopping, making the experience easy and efficient.

While we are living in the modern age, online shopping has gained a lot of popularity: 34% of our respondents buy their dog food online and get it delivered to their doorstep. A smaller group of dog owners (6%) trust their veterinarians and buy their dog food from the vet clinics, while 5% of our respondents buy their dog food at discount stores.

There are some interesting differences across the countries: For Canadian dog owners, specialized pet stores are their top choice (59%), while online purchases are least common (9%).

Across the border in the United States, a significant number of consumers buy dog food from supermarkets (55%) or from discount stores (13%). Meanwhile, online shopping is the top choice for French (46%) and British dog owners (49%).

### Where do you buy your dog food?

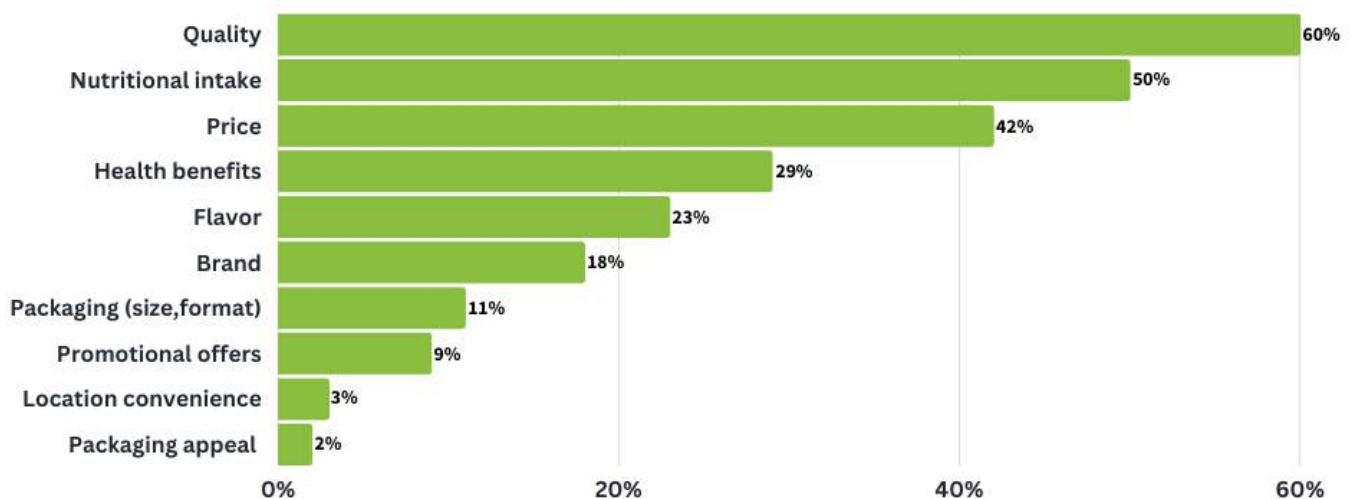


## Criteria when purchasing dog food

The criteria dog owners rely on when choosing food for their dogs sparks different opinions as they all have their own unique priorities.

- The majority (60%) want nothing but the best for their beloved dogs seeking food that is carefully crafted and meets the standards so their top priority is the **quality of the product**.
- The **nutritional value** of the food is also a high priority where 50% of our respondents carefully consider the type and amount of protein, making sure that their dog gets a balanced diet.
- 42% say that they pick their dog's food based on the **price**.
- For 29% of dog owners the **health benefits** of the food are essential, while 23% of them value the **flavors and taste** of the dog food.
- The **brand** plays a crucial role for 18% of the dog owners.
- 11% of the dog owners pick their food based on the **size and format of the packaging**.
- **Promotional offers** catch the attention of 9% of our respondents as they appreciate the chance to save on their dog's food then there is the opportunity.
- 3% consider the **proximity of the store** important, preferring the convenience of a nearby location.
- Lastly, only a few (2%) are influenced by the **appeal of the packaging** and information it provides.

### Criteria when buying dog food





When looking at the differences between countries, the quality of the product is very important for France (75%), while US consumers care less about it (48%).

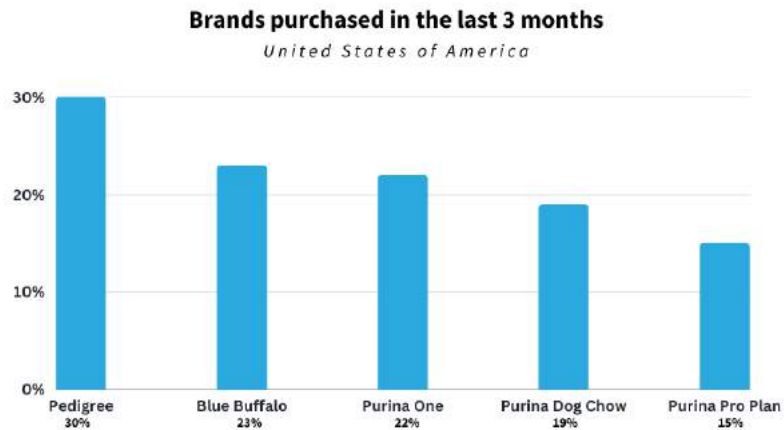
Regarding nutritional value, France (62%) and the UK (61%) place a slightly higher importance on it, compared to Belgium (26%) and the US (40%).

On the other hand, brand has a strong importance in the US (39%) and Canada (31%).

Belgian pet parents find packaging (20%) and promotional offers (16%) important in their decision making.

## Brands purchased in the last 3 months - Country breakdown

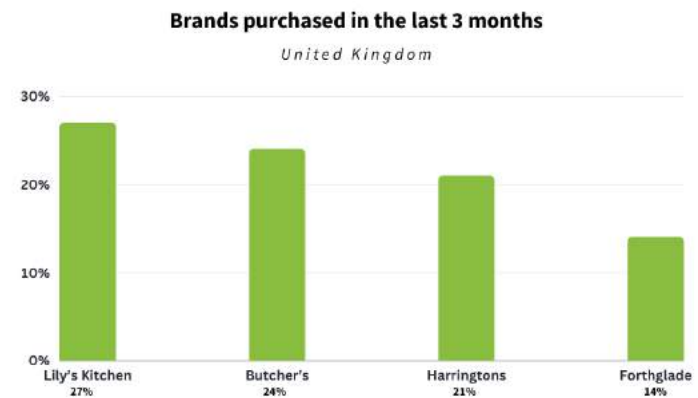
In the **United States**, Pedigree holds the first place as the most popular brand, chosen by 30% of dog owners in the last 3 months. Close behind is Blue Buffalo with 23% and Purina One with 22%, followed by Purina Dog Chow with 19% and lastly Purina Dog Chow with 19%.



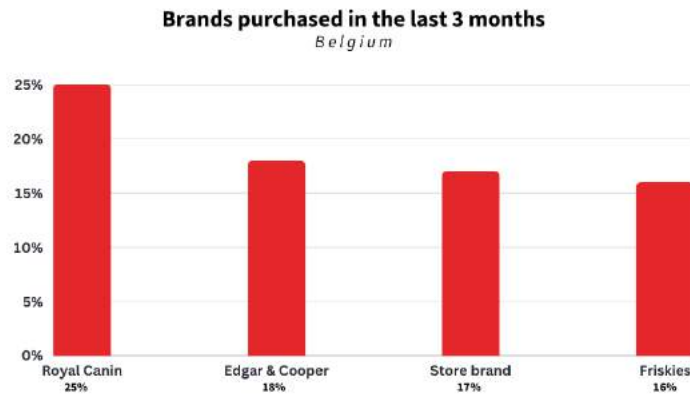
In **France**, their first choice of dog food in the last 3 months was Carnilove with 23%, followed by Ultra Premium Direct with 9% and Ownat with 5%.



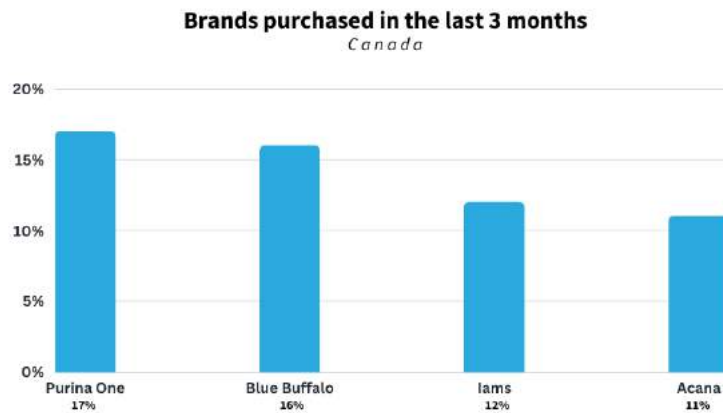
**United Kingdom** dog owners favorite dog food in the last three months was Lily's Kitchen with 27%. Close behind is Butcher's with 24%, followed by Harringtons with 21% and lastly Forthglade with 14%.



In **Belgium**, Royal Canin was the favorite dog food in the last three months with 25% of pet parents choosing it. Edgar and Cooper followed them with 18%, Store brand with 17% and finally Friskies with 16%.



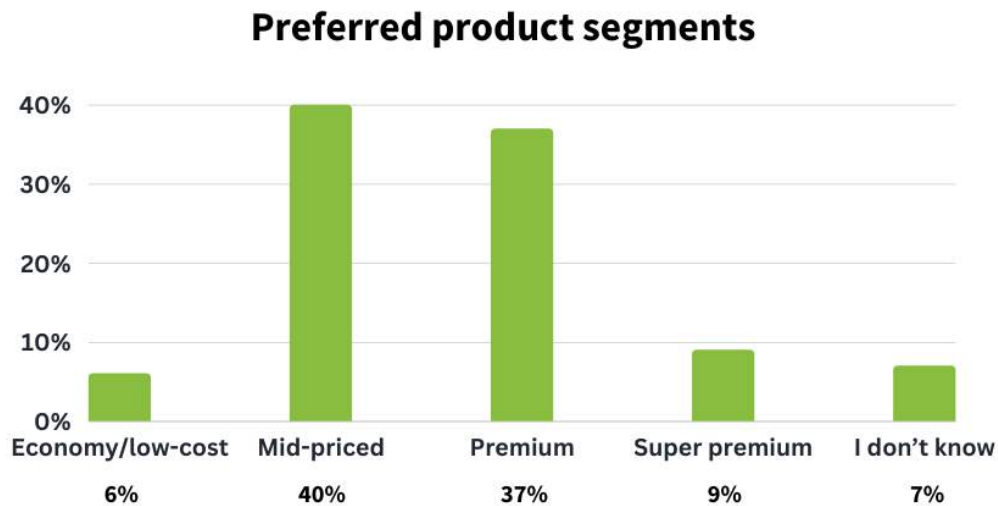
Lastly, in **Canada**, Purina One was the first choice in the last three months with 17%, right behind it comes Blue Buffalo with 16%, Iams with 12% and Acana with 11%.



## Preferred price segments

When it comes to the segment of the purchased products, 6% of dog owners opt for **economy and low-cost options**, finding choices that fit their dog's needs without spending too much.

Close to half the dog owners (40%) prefer **mid-priced products**. On the other hand 37% prefer **premium products**, and 9% **super premium** products for their dogs. 7% are not sure or don't have a clear preference for a category.



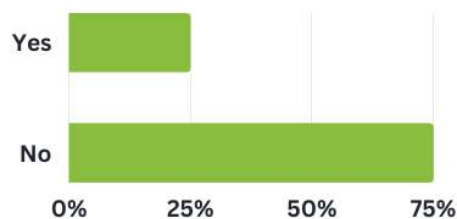
GlobalPETS | [www.globalpetindustry.com](http://www.globalpetindustry.com)

Source: Yummypets

## Impact of price increases

When asked whether the increase of prices in the last months has changed their purchasing decisions, 75% said that it hasn't impacted their decision, while 25% said it did.

### Did recent price increases have an impact on your purchasing decisions?



GlobalPETS | [www.globalpetindustry.com](http://www.globalpetindustry.com)

Source: Yummypets

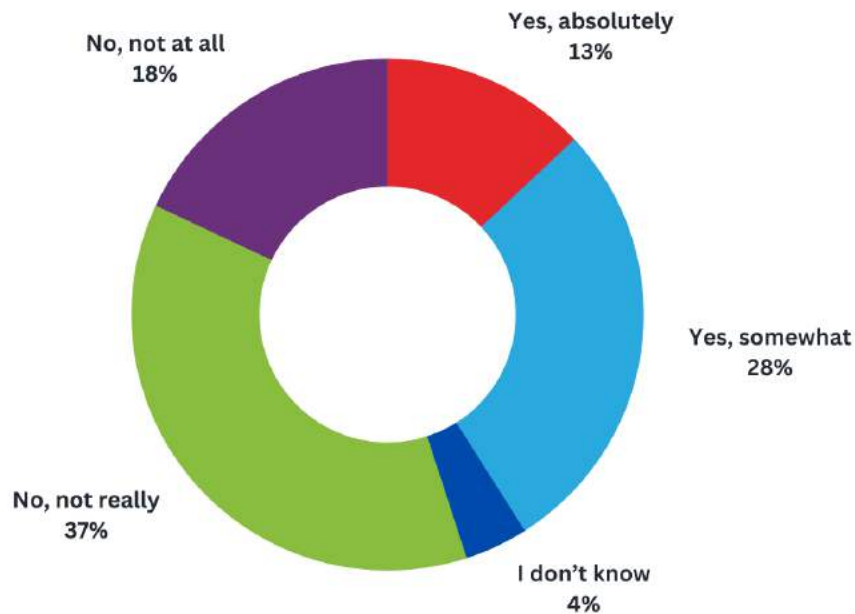
## Product selection

When sharing their experience of choosing dog food, dog owners have different feelings and emotions.

For 13%, the process of selecting dog food is an absolute headache. A rather larger group of 28% admitted that choosing dog food is somewhat difficult for them. 4% were not sure how they felt in this regard.

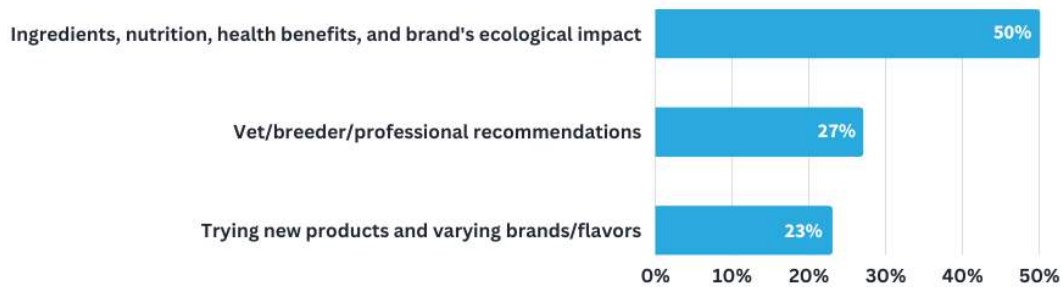
On the other hand 37% of dog owners we asked found choosing dog food manageable and not really difficult, while 18% said they do not find this difficult at all.

### Is choosing dog food difficult?



When asked **based on what criteria they pick their dog's food**, 50% of dog owners say they read the ingredients list and carefully assess the nutritional information, health benefits and ecological impact.

## How do you pick your dog's food?



GlobalPETS | [www.globalpetindustry.com](http://www.globalpetindustry.com)

Source: Yummypets

A significant group of dog owners (27%) trust the opinion of professionals by sticking to their vets, breeders or dog professionals' opinion when choosing food for their dog.

Meanwhile, 23% of dog owners choose their dog's food by trying new products and varying the brands and flavors.

Looking at the differences between countries, France (61%) and UK (62%) dog owners are more likely to follow the ingredients list, prioritizing the nutritional aspect in their decision-making.

42% of Belgian dog owners lean towards trusting the recommendations of vets, breeders or professionals, valuing the expert opinions, while 30% of them choose their dog food based on their personal preferences, seeking variety for their dogs meals.

The same applies to US pet parents, where 29% go for variety as well, while in France they are less likely to try new products with only 14% going for this option.

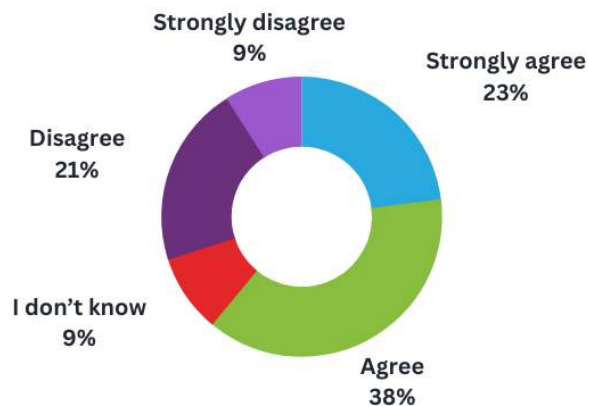
## 5. Difficulties when buying dog food

### *Picking a good brand*

A significant number of pet owners (23%), strongly agree that the process of choosing a good brand is difficult, while a larger group (38%) somewhat agree that it is difficult.

On the other hand, a notable percentage (21%) disagreed with the fact that it is difficult to decide on a brand, while a small portion (9%) strongly disagreed.

#### **“I find it difficult to pick a good brand”**

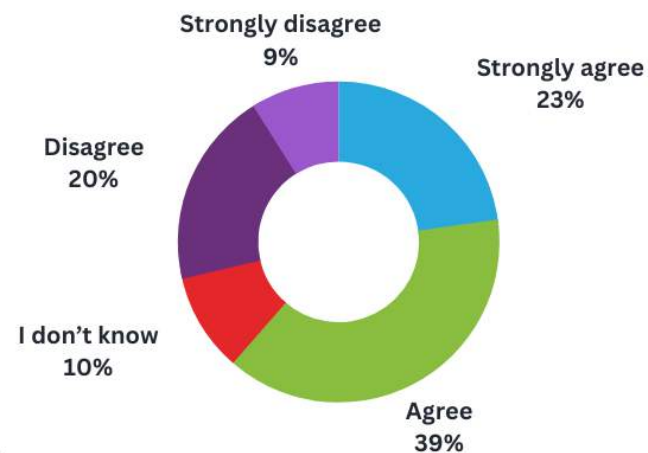


### *Recipe*

When choosing the right recipe for their dogs, 23% of pet parents strongly agree with the struggle. 39% of them somewhat agree that it is difficult, while 10% are uncertain in this regard.

Moreover, 20% of the respondents disagree that it is difficult to pick a good recipe, whereas 9% strongly disagree.

#### **“I find it difficult to pick a good recipe”**



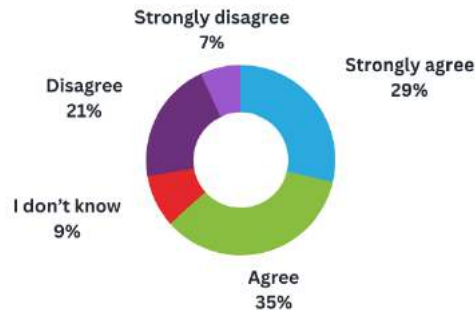
## ***The best ingredients***

A significant portion of pet owners (29%) strongly agree that it is a struggle to find the best ingredients for their dogs' health, while a larger group (35%) somewhat agree with having this issue.

On the other hand, 9% of our respondents strongly disagree, while 21% somewhat disagree, thus asserting that they don't find this difficult.

In France a higher percentage of pet owners (40%) strongly agreed with this struggle. And in the UK, 34% of pet owners disagreed with this statement.

### **“I find it difficult to pick the best ingredients for the dog’s health”**



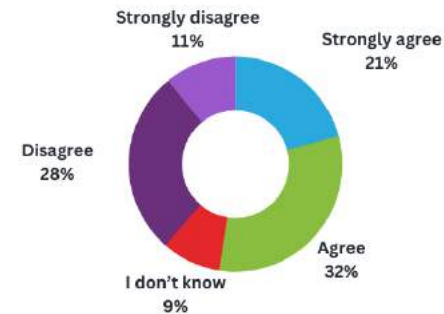
## ***Different flavors***

Some dogs are a little more picky about what they eat.

21% of our respondents strongly agree that it is difficult to find enough different tastes/flavors to satisfy their dog. 32% somewhat agree, acknowledging that it could sometimes be tricky to find enough variety to truly please their furry friends.

On the other hand, 11% strongly disagree and 28% somewhat disagree that it is difficult to find enough different tastes to satisfy the dog.

### **“I find it difficult to find enough different tastes to satisfy the dog”**

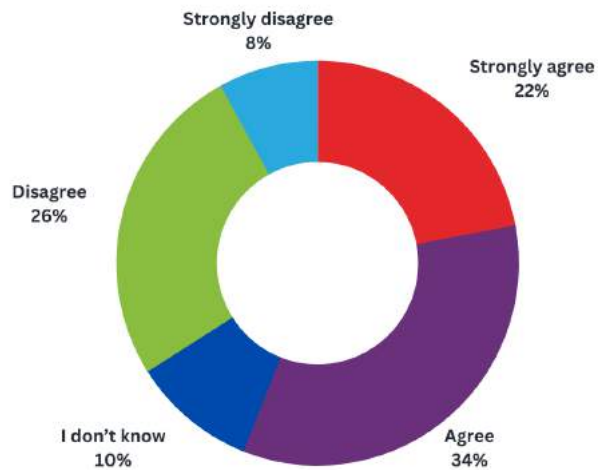




## Packaging

The majority of respondents find it difficult to find enough relevant information on the packaging to make an informed decision: 22% strongly agree and 34% somewhat agree with the fact that finding information in packaging is indeed difficult.

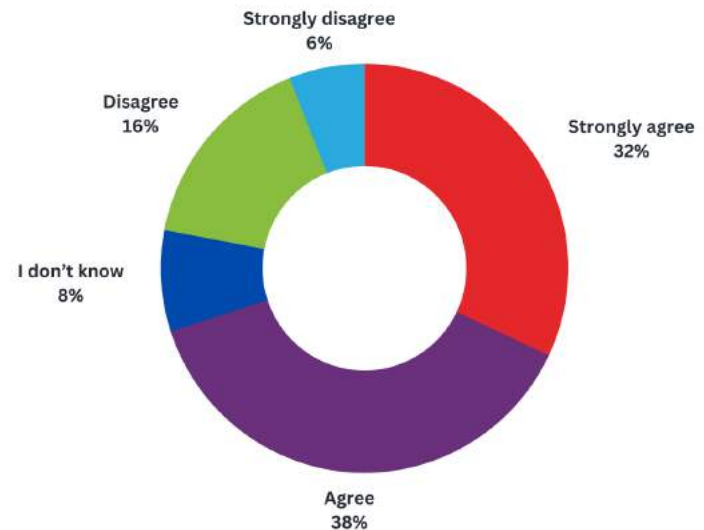
### I find it difficult to find enough information on the packaging:



## Ensuring the quality of the ingredients

32% of dog owners strongly agree and 38% somewhat find that ensuring that the quality of the ingredients is indeed good, difficult.

### I find it difficult to ensure the good quality of the ingredients:

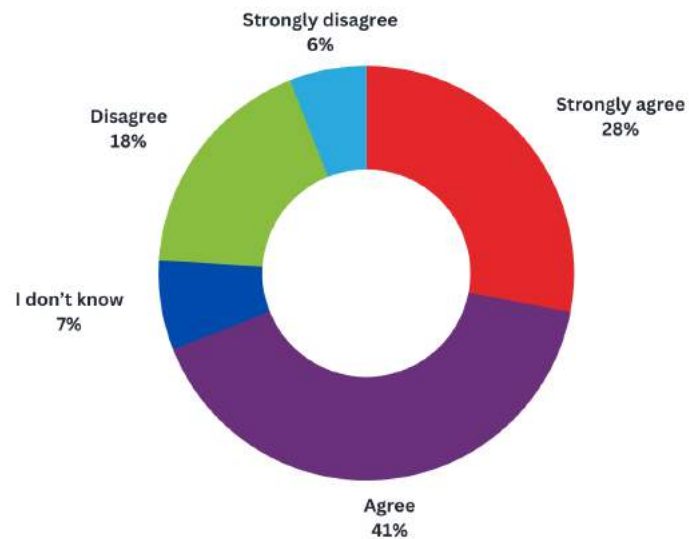


## ***Finding the best value for money***

The majority of dog owners (69%) find it difficult to find the best value for money.

On the other hand, 18% disagree and 6% strongly disagree that it is difficult to find good value for money.

### **I find it difficult to find the best value for money:**

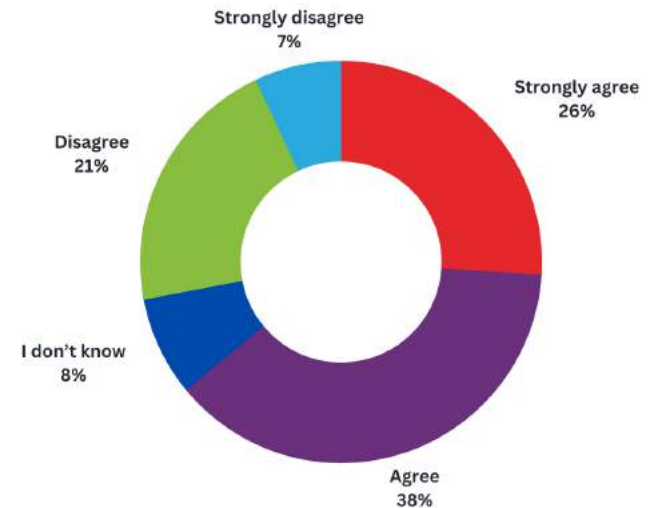


## ***Nutritional or health needs***

A significant portion (26% and 38%) indicate they find it difficult to make an informed decision whether the product will suit the dog's nutritional or health needs.

Conversely, 21% disagree and 7% strongly disagree with the fact that it is difficult to choose the appropriate product for their dogs' nutritional or health needs.

### **I find it difficult to choose the product that will suit my dog's nutritional or health needs:**

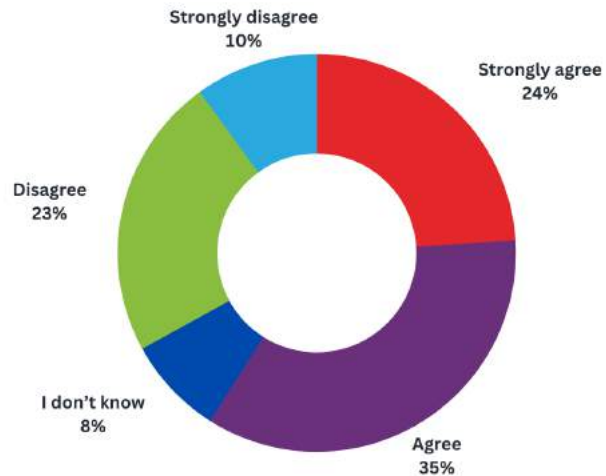


## ***The dog's taste***

Is it difficult for dog owners to find products that their dogs truly enjoy? For the majority (24% and 35%) it is.

On the other hand, 10% strongly disagree and 23% disagree with this statement, admitting they do not encounter difficulty in selecting products that suit their dog's tastes.

### **I find it difficult to choose a product that suits the dog's taste:**

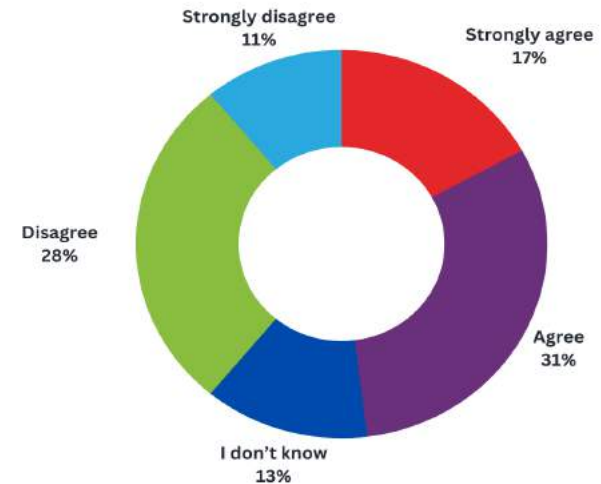


## ***Weight gain prevention***

Almost half of pet parents admit they find it difficult to select a suitable food product that helps with their dog's weight management.

On the other hand, 28% disagree, and 11% strongly disagree and don't have this problem.

### **I find it difficult to choose a product that will prevent them from gaining too much weight:**

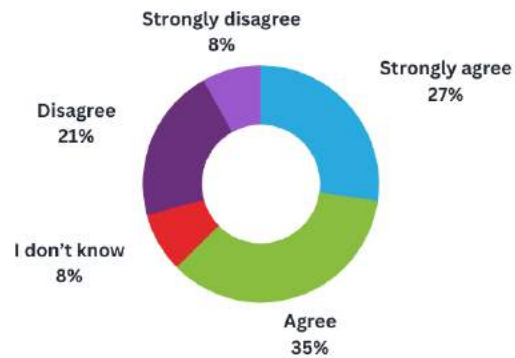


## ***Digestion***

When it comes to the difficulty in choosing a product their dog can properly digest, 27% agree and 35% strongly agree that they have this issue.

21% disagree, and 8% strongly disagree.

### **“I find it difficult to find a product my dog can digest easily”**

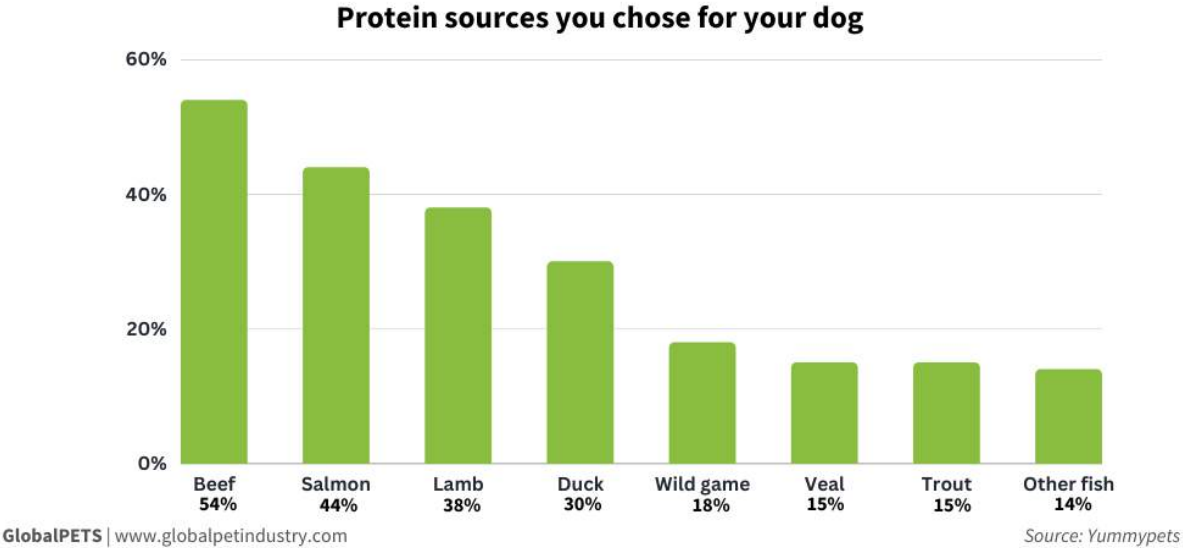


# 6. Protein source

## Most popular protein source

The majority of respondents (54%) opt for beef as a protein source making it the most popular choice among the options. Salmon follows with 44%, while Lamb ranks third with 38%.

Duck is selected by 30% of our respondents, Wild Game by 18%, while Veal (15%) and Trout (15%) stand in the same position. Other fish, at 14% are the least considered protein source.



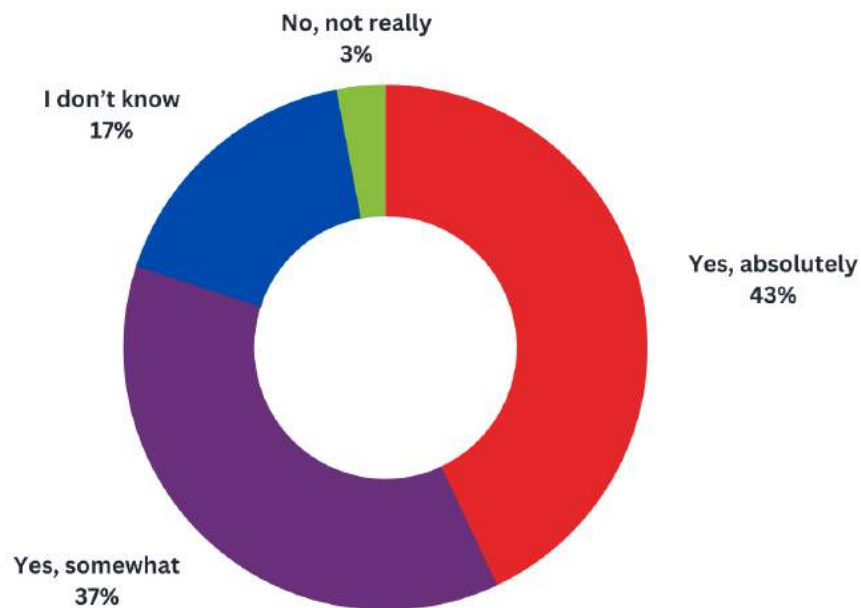
## ***Nutritional differences between protein sources***

Most people (80%) agree that there are indeed nutritional differences depending on the protein source. On the other hand, 17% remain uncertain, stating that they do not know what opinion they have in this regard.

A small fraction (3%) expresses skepticism, stating that they do not agree that there are nutritional differences between different sources of protein used in dog food.

The data highlights that the majority of respondents from Canada (52%) are more inclined to agree that there is a nutritional difference.

### **Are there nutritional differences depending on the source of protein used in dog food?**



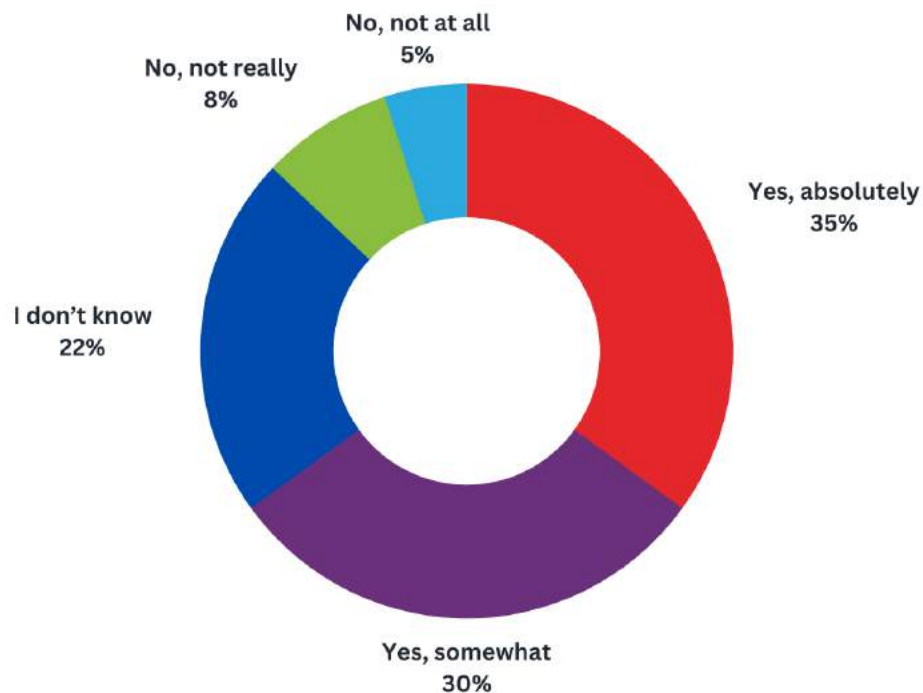
## Alternative proteins

When it comes to considering alternative protein sources, a notable proportion (35%) shows strong enthusiasm, expressing they would absolutely be open to the idea. 30% state they are somewhat open to it.

On the other hand, 22% remain unsure regarding this topic. A smaller percentage (8%) stated they would not really support this, while an even lower percentage (5%) firmly declines the idea by stating they wouldn't support it at all.

Consumers from the United States (45%), United Kingdom (43%), and Canada (47%) demonstrate a higher likelihood of supporting alternative protein sources, while those from France and Belgium seem to be less receptive to this idea.

### Would you be open to non-animal protein for your dog's diet?



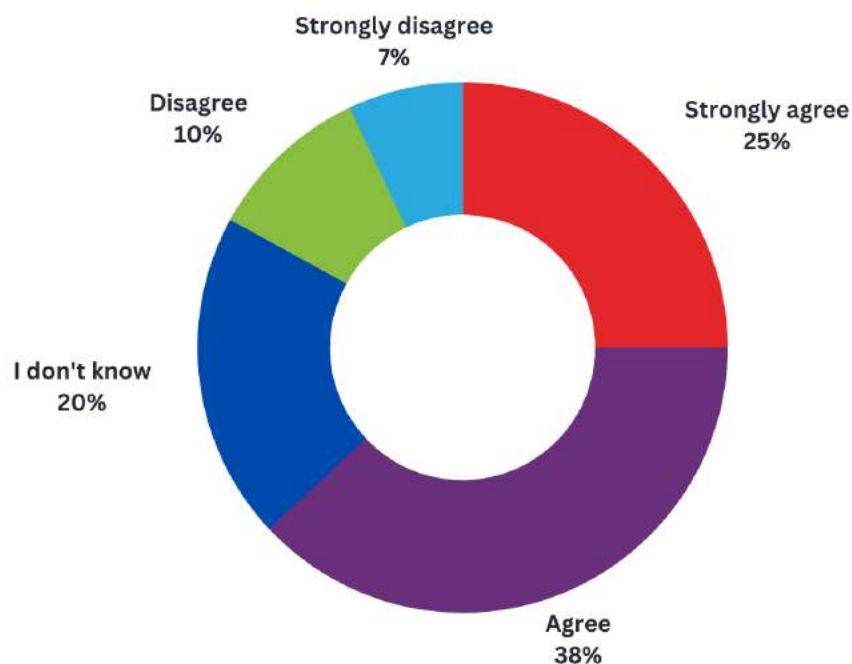
## ***Vegetable protein***

When it comes to being open to using vegetable protein as an alternative, the majority is open to feeding their dogs food that contains these proteins: 25% strongly agree and 38% agree to consider it.

On the other hand, 10% disagree and 7% strongly disagree with the idea of vegetable protein dog food.

Consumers from France and Belgium demonstrate a higher likelihood of being open to the concept, with 36% and 35% respectively agreeing to consider it. Contrary to that, consumers from the United Kingdom appear to be less open to the idea.

### **Would you agree to giving your dog food with vegetable protein?**





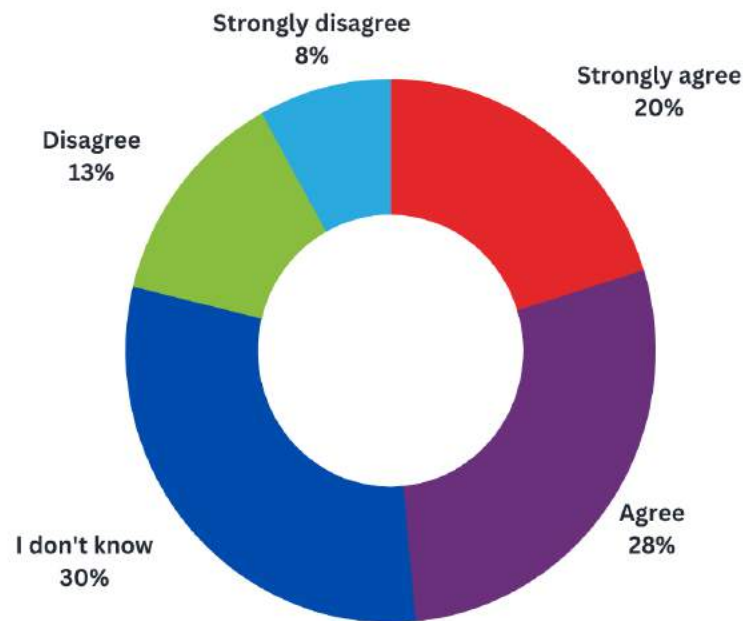
## ***Insects***

When discussing the openness to providing their dogs with food containing insect proteins, 20% strongly agree and 28% agree to consider this alternative. 30% remain uncertain, stating they do not know.

A small group is opposed to the idea: 13% disagree and 8% strongly disagree with the idea of using insect-based protein.

Consumers from the United States appear to be less open to this concept compared to other regions.

### **Would you agree to giving your dog food with insect protein?**

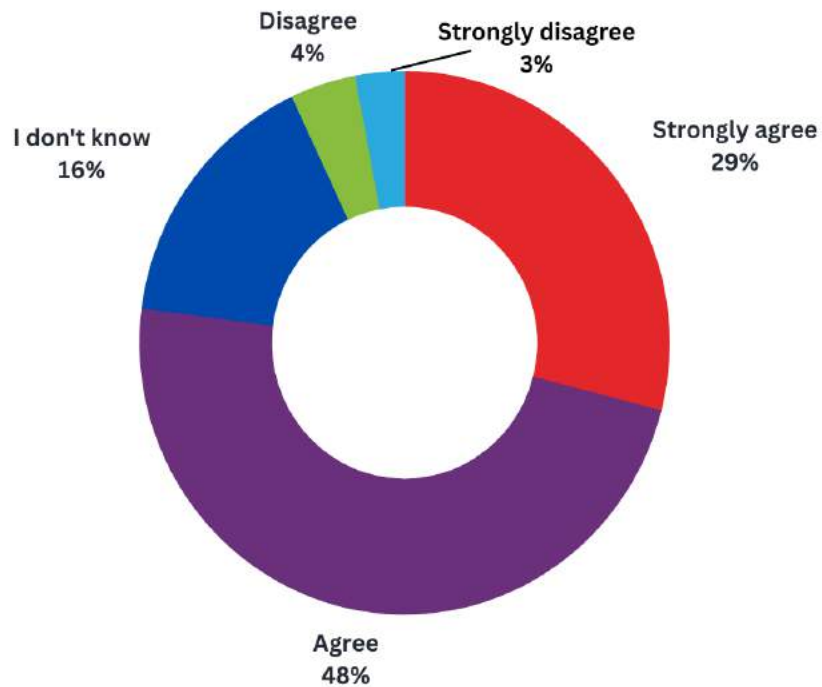


## Eggs

Quite a high percentage exhibits a positive opinion around incorporating egg protein in their dog's food: with 29% strongly agreeing and 48% agreeing to the idea of it.

16% remain uncertain about their stance on this matter. 4% disagree and a mere 3% strongly disagree with the concept of using egg protein.

### Would you agree to giving your dog food with egg protein?



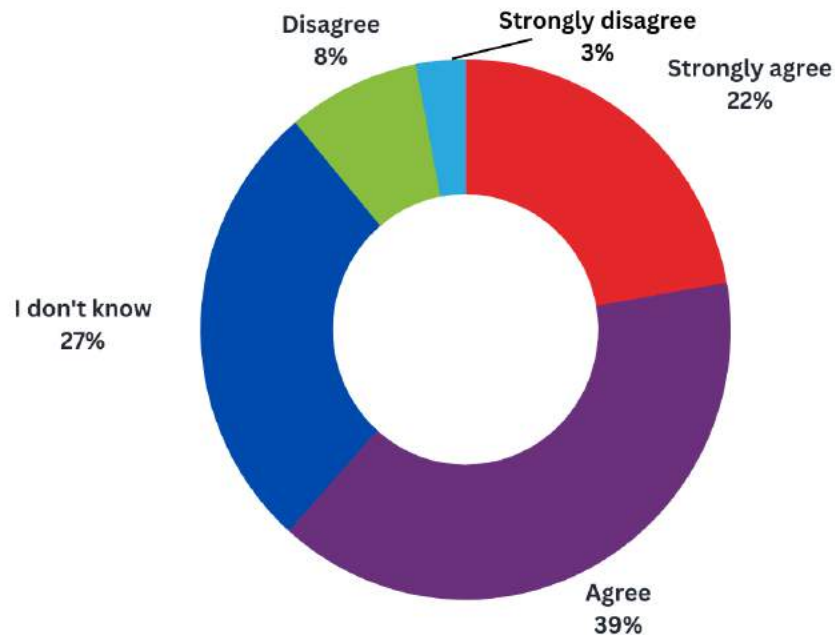
## Algae

A notable number of respondents have a positive attitude towards using algae-based protein in dog food: 22% strongly agree and 39% agree to the idea.

While 27% do not know where they stand in this regard, 8% disagree and 3% strongly disagree with this option.

France and the United Kingdom demonstrate more openness to this idea compared to other regions.

### Would you agree to giving your dog food with algae protein?



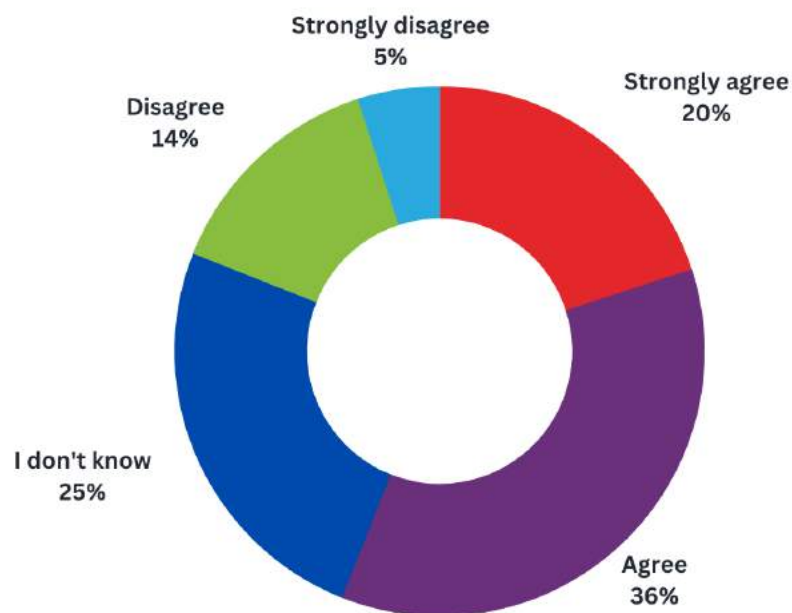
## **Milk**

For using milk protein as an alternative, 20% strongly agree and 36% agree they would consider this protein for their dog's food. 25% are not sure.

14% disagree and 5% firmly disagree with the idea of using milk protein.

Respondents from the United States appear to be more open to this concept compared to other regions.

### **Would you agree to giving your dog food with milk protein?**

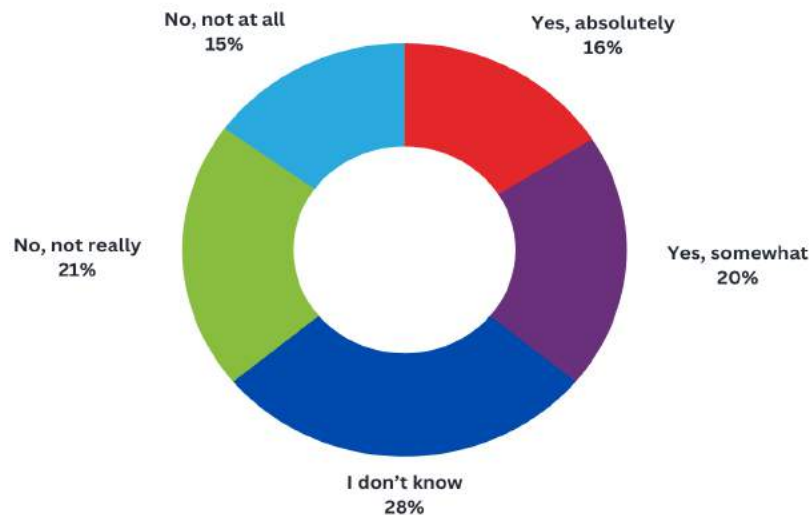


## 7. Meat or no meat?

Do pet parents believe that their dog can be healthy without any source of animal protein?

Assuming the dog's diet would be appropriately balanced, 16% strongly agree and 20% agree to the feasibility of a meatless diet.

### Could your dog be fed on a meat-free balanced diet?



GlobalPETS | [www.globalpetindustry.com](http://www.globalpetindustry.com)

Source: Yummypets

However, a considerable 28% remain uncertain, while 21% disagree and 15% strongly disagree with the thought of providing a meatless diet to their dogs.

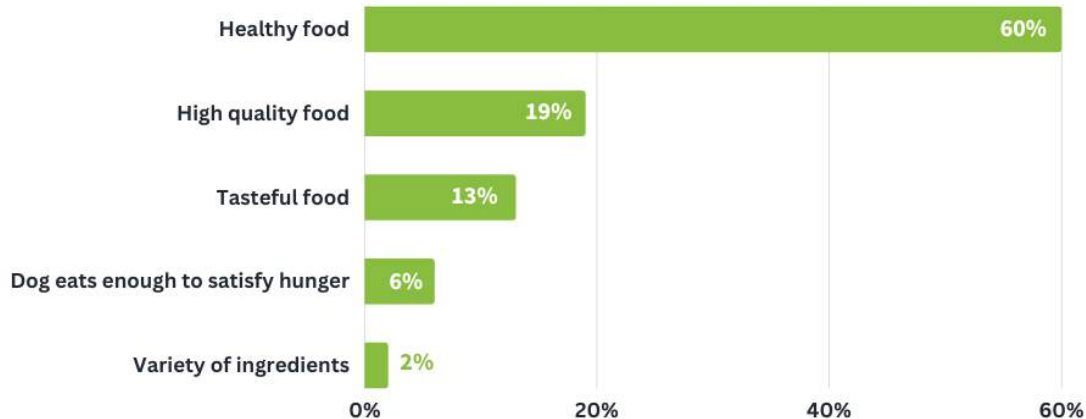
## 8. Dog diet - important factors

The majority (60%) place great importance on ensuring that the food they provide for their dog is beneficial for its health, emphasizing the focus on nutrition and overall well-being.

Additionally, 19% prioritize high-quality food. A smaller percentage (13%) emphasizes their dog's taste preferences.

Whether the dog eats enough to satisfy its hunger (6%) or the variety of ingredients (2%) is less important.

### What is most important to you about your dog's diet?



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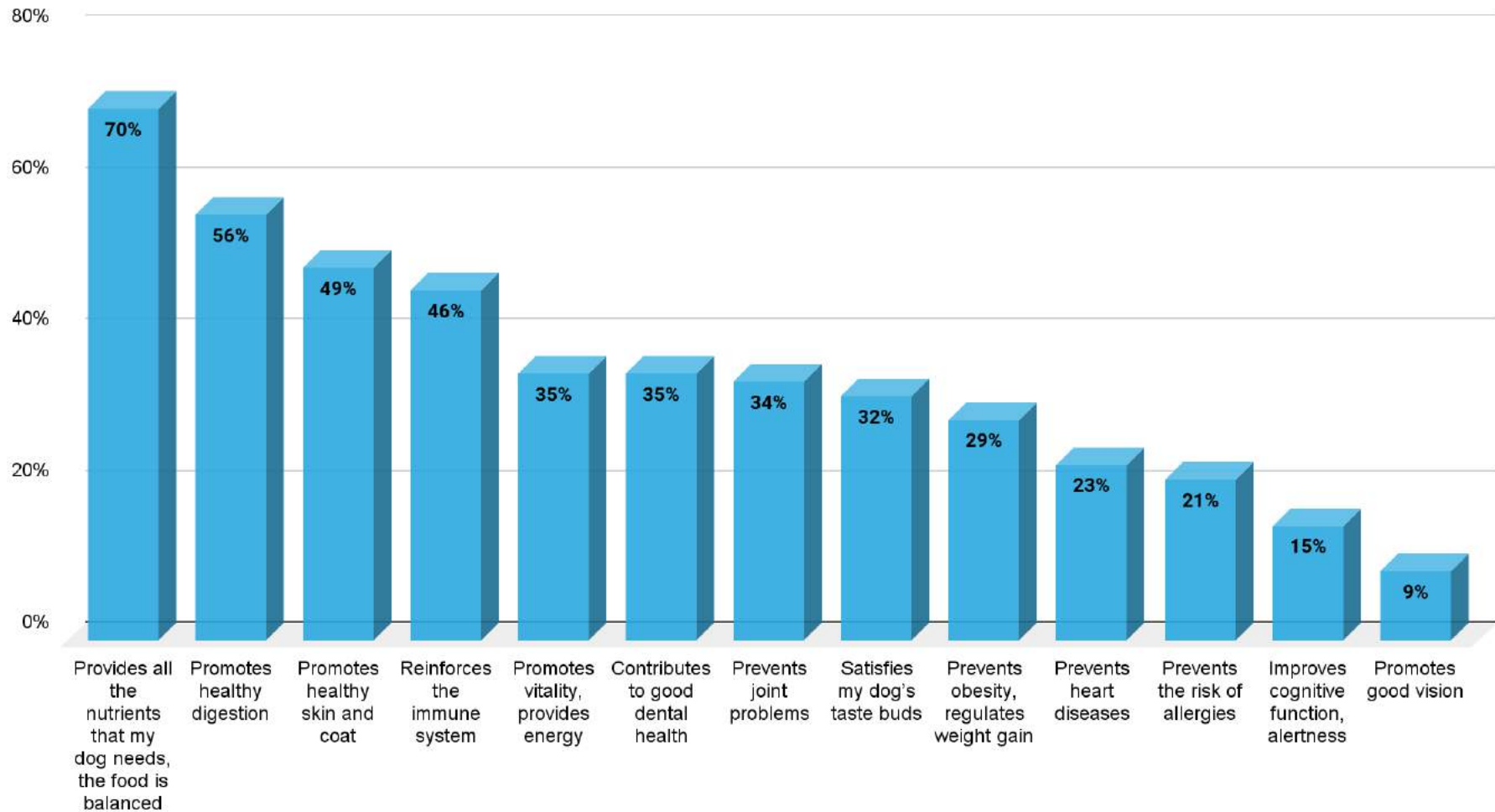
Source: Yummypets

### ***Most important benefits provided by dog food***

70% of participants consider it most important that their dog's food provides all the necessary nutrients and is balanced. Other important benefits include healthy digestion (56%), healthy skin and a shiny coat (49%) and reinforcement of the immune system and natural defenses (46%).

The least important benefits seem to be good vision (9%), cognitive function improvement (15%), allergy prevention (21%) and heart disease prevention (23%).

## MOST IMPORTANT BENEFITS PROVIDED BY DOG FOOD

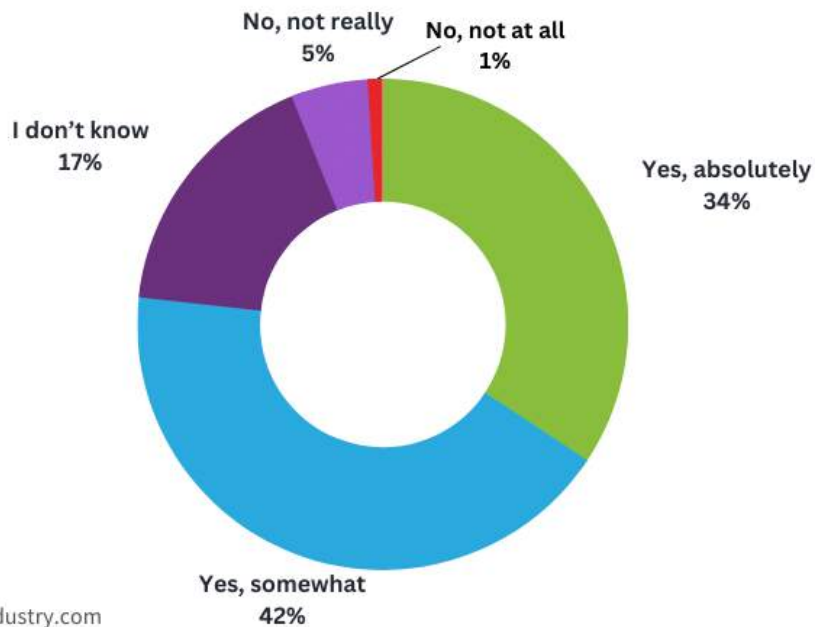


## ***Price elasticity of personalized food***

A notable portion (34%) state that they would be absolutely willing to pay a higher price for food that is specifically tailored to their dog's needs. 42% agree, indicating a willingness to pay more to some extent.

Only 5% express hesitancy stating they would not really do that, and merely 1% firmly reject the idea. 17% remain uncertain.

### **WOULD YOU BE WILLING TO PAY MORE FOR FOOD TAILORED TO YOUR DOG'S NEEDS?**



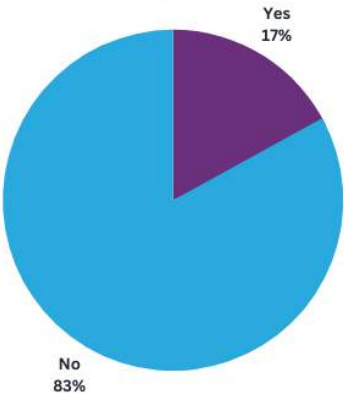


# 9. Health focus

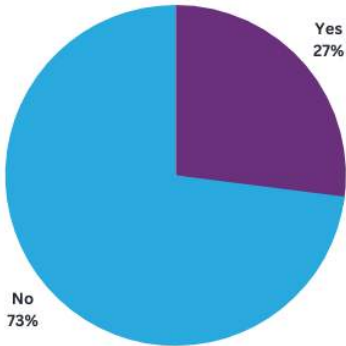
To get a better sense of how healthy the average dog is, we asked about a number of possible ailments and conditions their dog might suffer from.

Here's what we found:

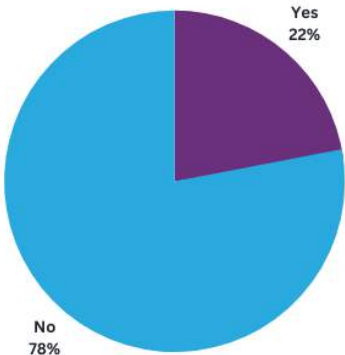
**Issues with joints?**



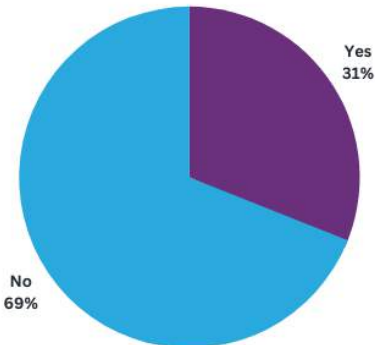
**Issues with digestion?**



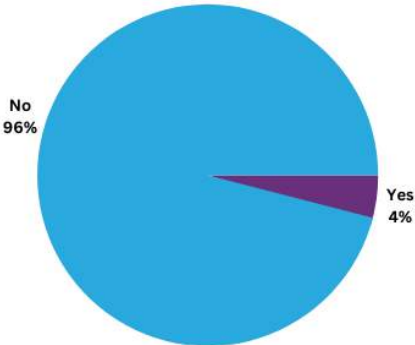
**Allergies or skin problems?**



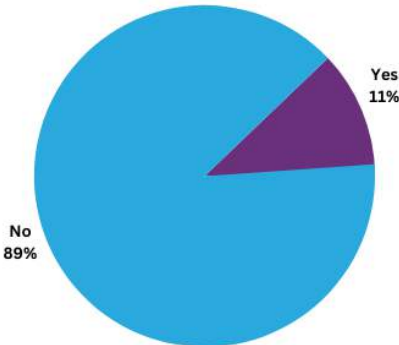
**Issues with stress?**



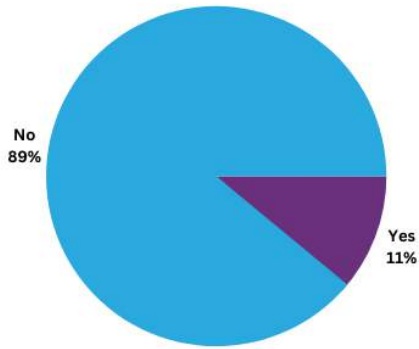
**Urinary issues?**



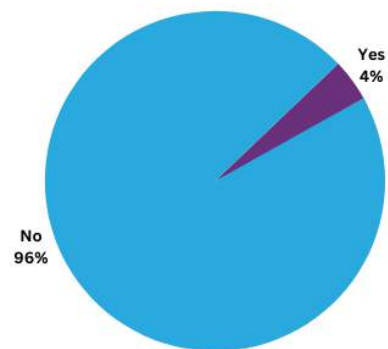
**Issues with overweight?**



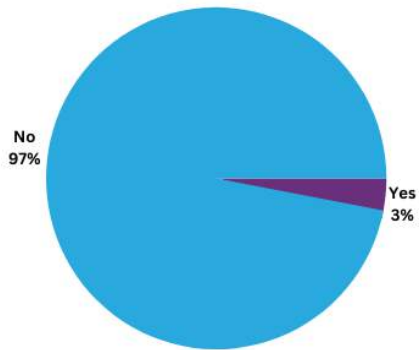
### Difficult appetite?



### Breathing issues?



### Heart issues?



### Other issues?

