

WHAT THE FUTURE: PETS

How pet food is evolving to fit modern lifestyles PAGE 9

How making pet care more affordable could make people healthier PAGE 12

How AI could revolutionize how we connect with and care for our pets PAGE 19

What elevating pets in our families and society means for business PAGE 23

+ Experts from Mars Pet Nutrition, Zoetis, Hill's Pet Nutrition, Personifi AI and Boise State University share how our evolving relationship with pets is reshaping society, business, health and technology

50th Issue!



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How companies can prepare for the changing status of pets in the future

Imagine it's 2034.

Pets are a big deal. According to the American Association of Pet Products, pets are about a \$150 billion industry in the U.S. Eight in ten younger households (18-34) have a pet, according to the Ipsos Future of Pets survey. That's 10 percentage points more pet households than in 2018, before the pandemic.

Growth in the future will be driven by a combination of long-standing demographic trends: Americans are getting married later, having kids later and having fewer of them. More of us live alone, especially the growing portion of our population that is older. We live in more urban spaces.

But humans are social creatures. We crave companionship. Only 8% of people say they don't want a pet at all.

There are barriers to that potential growth. Younger (and older) people are more likely to rent, so finding housing that will take pets is a challenge. Caring for pets was a lot easier

during the pandemic, when much of this boom occurred. Back-to-office mandates, resumption of normal travel patterns and inflation could create adverse conditions for keeping pets in the family. Most pet owners, according to Ipsos, say pets are more of an investment in both time and money than anticipated.

One thing we heard again and again from the experts we interviewed was that the role of pets in our lives has evolved. Dogs used to live in literal doghouses, outside, in the yard. Then they moved into the kitchen or basement. Now many sleep in beds with humans. Unless the humans are instead sleeping in the *pets'* bed. Because that's a thing. Granted, the ancient Egyptians adorned their pet cats with gold jewelry and dedicated monuments to them. So while our love of pets is constant, it also evolves.

In the future will "in the doghouse" have any meaning?



61%

of adults ages 18 to 34 say they have a dog, up from 52% in 2018.

(Sources: Ipsos surveys conducted Jan. 10-13, 2025, among 1,119 U.S. adults, and Dec. 13-14, 2018, among 1,003 U.S. adults.)

A confession

Let’s acknowledge the (lack of) elephant in the room. I don’t have a pet. As a kid, I did have a goldfish, Horton Waffle, who lived for 10+ years and had his death announced on a 50,000-watt clear-channel radio station.

Why don’t I have pets? I’m allergic, for one thing. And also part of that 8% who just don’t want them. Maybe my hesitance could be overcome if I had an AI-assisted Shazam band for my would-be pet. We’ll talk about that later in the issue, but it sounds so cool that if it does even half of what it’s setting out to do it might, *might* make me want a cat.

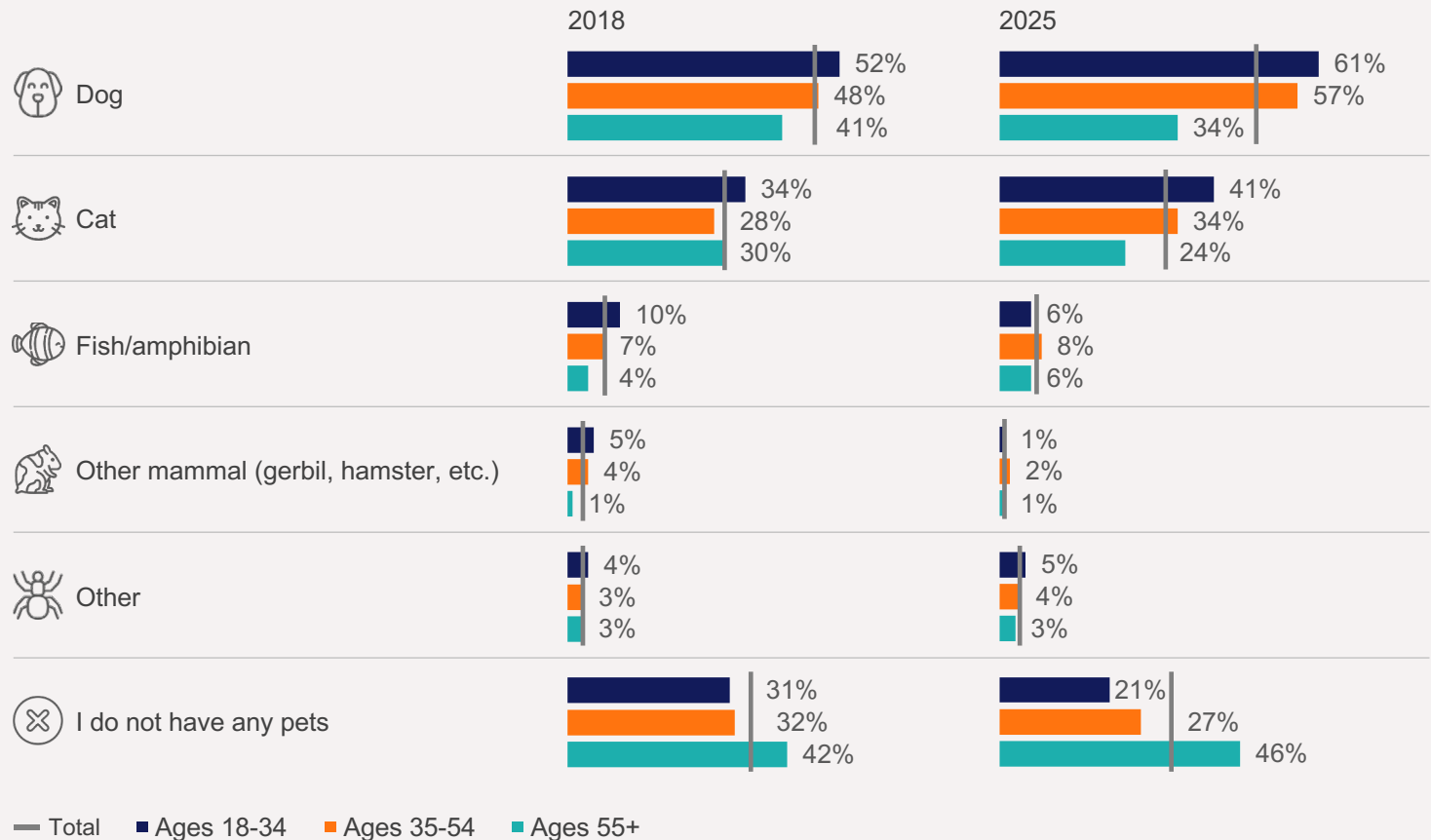
Just don’t tell my kids I said that or I’ll never hear the end of it and will wind up a cat owner.

To parent or to pet parent?

For many, the answer to that question is “both!” But some are getting pets instead of having children. The need for companionship and to care for another are core human values. Therefore, most (70%) agree that having pets is as much work as having kids — even people who have kids.

Pet ownership among younger Americans is surging

Q. Do you have any pets?



Pets *are* work: Most (72%) say pet logistics are a big part of their travel planning. Half say they have had to take time off from work to care for their pets. Pets also cost a lot. Most (72%) say they will pay whatever they need to get the best care for their pets. And most (59%) say they are more likely to pay for premium food for their pets than themselves.

Premiumization of pets

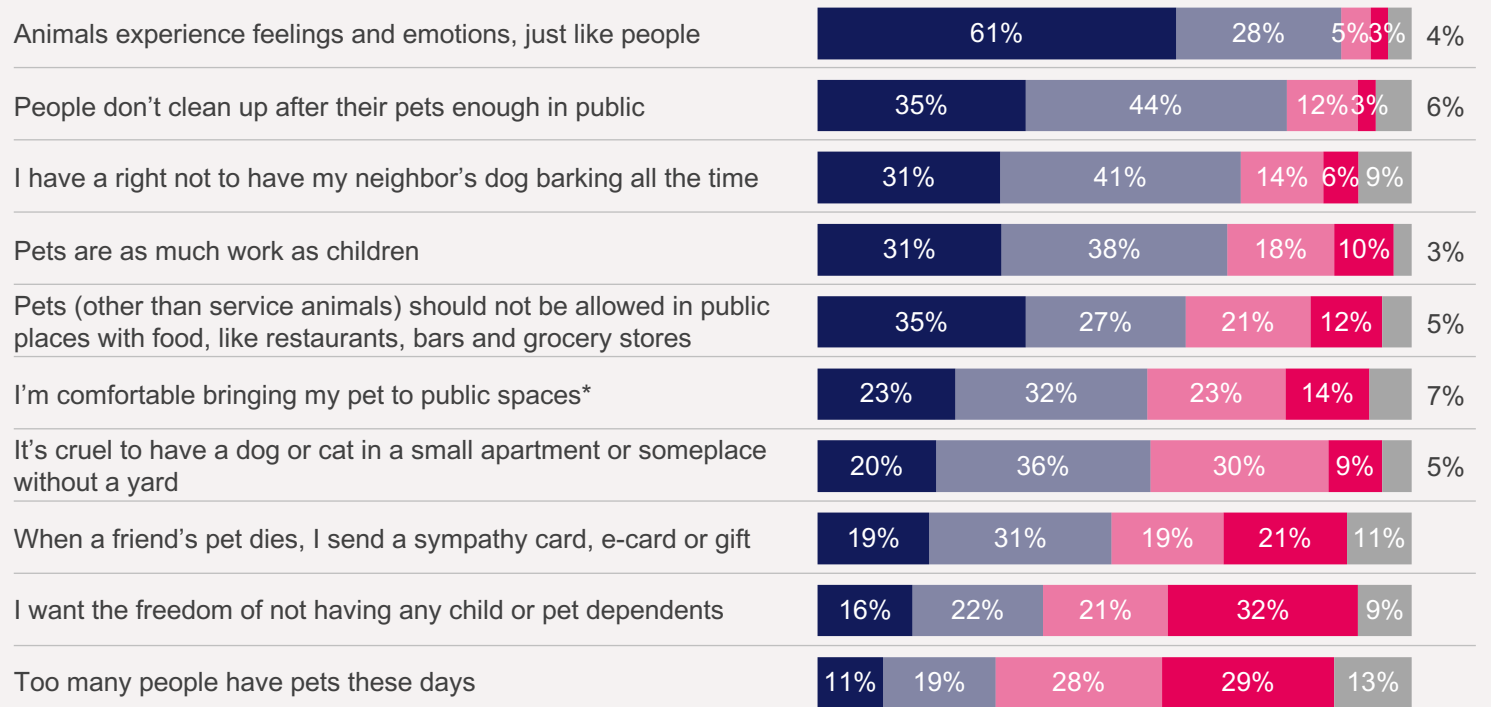
Premiumization is a theme you'll hear throughout this issue. We place our pets on a pedestal, or a patio, an enclosed outdoor patio for our cat. We'll do anything for them, which increasingly means some serious medical bills. Humans have a growing understanding of the effects of food, exercise, and preventative care on both our mental and physical health. That's spilling over into our understanding of pet health — and vice versa!

Pet tensions

Even though most people have pets and still more want them, that doesn't mean everyone wants pets everywhere in everything all the time.

Most Americans strongly agree pets have feelings

Q How much do you agree or disagree with the following statements? (% Total)



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ Don't know / Not applicable

(Source: Ipsos survey conducted Jan. 10-13, 2025, among 1,119 U.S. adults, including *725 who say they have a pet.)

Most (79%) agree that people don't clean up after their pets well enough. Most people (72%) feel that they have a right to quiet and they shouldn't have to put up with their neighbor's dog barking all the time. And most (62%) feel that non-service pets shouldn't be allowed in places that serve food.

These tensions open avenues to both better cater to pets and their caretakers but also to create pet-free spaces. Defining boundaries can reduce the tension in good ways for everyone involved.

What does pet ownership look like in the future?

Let's spin this further forward. We won't get into the whole discussion of designer breeds, but that's a thing, and we'll probably see more of those as we humans adapt to urbanization and climate change.

It's worth noting that most (56%) think it's cruel to keep a pet in a small living space or someplace without a yard. Between that and the tensions, it's easy to imagine that maybe there's a lot of silent judging (or social media shaming) going on, and that that could get much worse in our future.

But there are lots of relevant business questions that all come down to one big question: What's the ceiling of our humanization of pets?

- Will more people need pet health insurance? Or will people's insurance start to cover pets as dependents? Will financial services respond in general, too?
- Will we see more workplace perks related to pets?
- Will the travel industry, rental housing and especially senior living centers expand their pet accommodations?
- How will our economic trade-offs impact our pet spending?
- Will people continue to have fewer pets per household in much the same way they are having fewer children?
- How will the politics of alternative proteins and the "Make America Healthy Again" movement impact the development of pet foods, too?

In the end, it comes down to one final stat: Sixty-four percent of people say they prefer spending time with their pets than with other people. That's unlikely to change in the future.



Matt Carmichael is editor of *What the Future*.

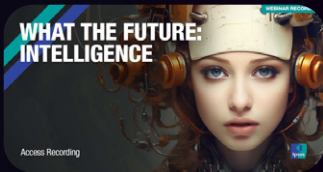
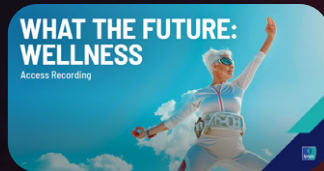
93%

of Americans say they treat their pet like it's a member of the family, with 97% of adults ages 55+ agreeing vs. 91% of younger peers.

(Source: Ipsos Consumer Tracker survey conducted Aug. 20-21, 2024, among 694 U.S. adults who have a pet.)

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When you imagine possible tomorrows, **you ask better questions today.**



Shifts: How will our relationship with pets inform purchase behaviors?



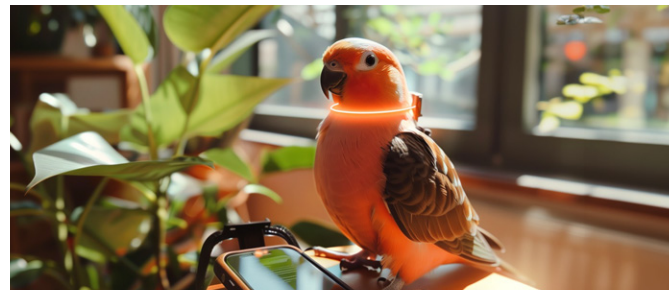
*Matt Palmer is a consultant at Ipsos Strategy3.
matt.palmer@ipsos.com*

NOW: From family pet to part of the family



Our human-pet bond is reflected in heavy spending on pet care, premium products and specialized services. However, human and animal needs are distinct. Pets primarily fulfill an emotional role.

NEXT: From human alternatives to just for pets



Pet tech will become more sophisticated, enabling deeper understanding of animal needs and hyper-personalized care. Pet-centric spaces and services will expand, integrating pets more seamlessly into daily life. Focus will shift into animal wellbeing and mental health, customizing care for happier pets.

FUTURE: From companions to equals



Pets may achieve near-human status in some societies, spurring an evolution in legal and ethical frameworks. Advanced technology may enable interspecies communication. This integration will raise complex questions about animal rights and the very definition of family.

How pet food is evolving to fit modern lifestyles



Lisa Campbell

Senior vice president, corporate affairs, Mars Pet Nutrition North America

Pet ownership is evolving as adoption rates soar and pets become integral family members. Pet care and food companies are responding with products that not only meet pets' nutritional needs but also align with modern living conditions and owner preferences, says Mars' Lisa Campbell. She believes this shift is making long-term, responsible pet ownership more accessible and sustainable for the future.



Peanut

Lisa's French Bulldog, age 3

37%

of dog owners and 36% of cat owners in the U.S. strongly agree that their pet is the most important thing in their life.

(Source: Mars Global Parent Pet Study, conducted by Ipsos among 490 dog owners and 496 cat owners, 2024.)

What The Future interview with Lisa Campbell

Kate MacArthur: Pet adoption has long been a tactic of improving pet care sales. How does that factor?

Lisa Campbell: Pet adoption is the No. 1 way in the U.S. that people acquire their pets. It's more than 30%. But when you broaden that to the informal channels like picking up strays, maybe adopting a pet through a friend, it's almost 80%. It's important to understand that dynamic. The more we ensure pet ownership is a viable, sustainable, long-term option for people, the better.

MacArthur: Your global pet parent study found that more men (52%) than women (48%) globally have cats. How are demographic shifts changing pet ownership?

Campbell: One thing is where people live, but also people are getting married later and having children later and their pets are becoming their fur baby. More than a third of people say their pet is the most important thing in their life. With Gen Z and Millennials, that's between 40% and 45%.

MacArthur: Is the humanization of pet food more about owners' needs or pets' needs?

Campbell: There's a little bit of both. People start with "What's good for myself?" but then they also look at, "I know my dog's not exactly like me. What else might he need specifically?"

Americans most attribute their satisfaction as pet owners to the unconditional love, entertainment and stress relief they get from pets

Q. You rated your overall experience of owning your [dog/cat] a [score from prior question] out of 10. Could you please share the reasons that led to this score? Please select all that apply. (% Selected)



(Source: Mars Global Parent Pet Study, conducted by Ipsos among 490 dog owners and 496 cat owners, 2024.)

MacArthur: What shifts could shape the kinds of pet foods offered? Will there be a climate change food?

Campbell: Areas like oral care and skin and coat will continue to grow because those tend to be evident. Sustainability is something we think about through our pet food processes as well, whether that's through the ingredients we source, how we source them or where we source them, the processes that we go through, the packaging. All those things will continue to evolve as we look at achieving and making progress toward our "Sustainable in a Generation" goals.

MacArthur: How is urbanization affecting pet ownership and diets?

Campbell: In our Ipsos study of the barriers for people getting a pet, nearly 20% said they don't have the right living conditions. We tend to see people in urban areas having smaller pets. You might not want to lug a gigantic bag of dog food, so you might buy smaller bags, even for a bigger dog. Someone might say, "I travel a lot for work, and I live downtown, so it's easier to have a cat than a dog because my cat can be more self-sufficient."

MacArthur: How are pet food portfolios evolving to meet changing needs?

Campbell: It's nice to be able to offer a range and to democratize benefits that might typically be found only in

specialty channels but to bring them to the masses.

MacArthur: When we think about making places more pet-friendly, how does that shape pet food offerings?

Campbell: One example is we have a partnership with TripAdvisor with the CESAR brand where we consider what else is there to do beyond a visit and the hotel? What are other places I can take my pet with me so that they don't have to spend their whole trip in the hotel? For Restaurant Week in New York, we made a Pet Restaurant Week and had some of the food available for dogs.

MacArthur: Only 35% of Americans think pets should be allowed in all public spaces. What has to change to make pets in public spaces work for everybody?

Campbell: The foundation is responsible pet ownership. It's understanding the boundaries where your pets are allowed and where it's best that they aren't. We have a program we call "Pets Welcome." Throughout downtown Franklin, Tennessee, we created paw print markings in red, yellow and green for navigation, because the reality is pets can't be everywhere. Then it's just making sure you are creating the best environment for both the people who do own pets and the people who don't.

Kate MacArthur is managing editor of What the Future.



The more we ensure pet ownership is a viable, sustainable, long-term option for people, the better."

How making pet care more affordable could make people healthier



Jamie Brannan

Chief commercial officer, Zoetis

Humans have a better understanding of their own health, and as we become closer to our pets, that understanding often translates to our furry friends. Better care for our pets can lead to efficiencies, but also new costs. Zoetis is the world's leading animal health company. Its chief commercial officer, Jamie Brannan, sees a future where we help our pets live longer, and maybe they help us live longer, too.

47%

of Americans say the ability to afford healthcare for pets will get worse.

(Source: Ipsos survey conducted Jan. 10-13, 2025, among 817 U.S. adults who say they own a pet or intend to get one in the next year.)



What The Future interview with Jamie Brannan

Matt Carmichael: Where will growth come from in the pet health sector?

Jamie Brannan: The heart really is around the human-animal bond. If an animal's sleeping with you, you'll see different health conditions that you perhaps wouldn't see if the animal was in the yard. That increased focus on pet health is increasing medicalization and changing what people are expecting in treatments. We're also seeing that pets are living longer. That can lead to more chronic conditions and areas of unmet needs.

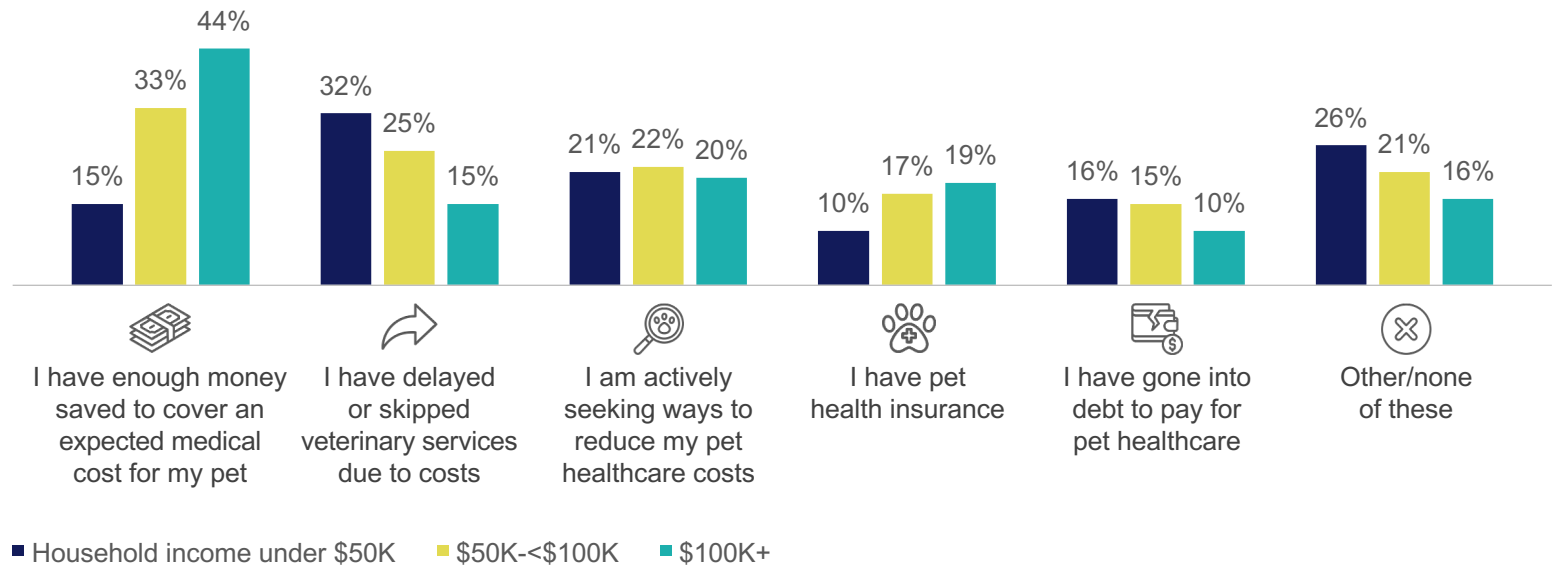
Carmichael: What innovation does that require?

Brannan: The animal health sector is still quite young so there are many areas that need innovation to address unmet needs, such as therapeutics for long-term, chronic diseases. We also think about preventative medicine. If we can prevent diseases, we can also improve healthcare. That can help manage costs around pet ownership as you're preventing problems before needing emergency treatment or big therapeutic agents. We'll see continued developments in diagnostics.

There's a lot of work with AI, which can enable quicker diagnosis of different diseases. You don't have to take a sample and send it off to a lab and wait for a diagnosis and then a therapeutic treatment. You can do it in the veterinary practice. And I think we'll see more genomics and more precision medicine targeting an individual pet based on the genomic profile.

Income influences people's pet care financing and decisions

Q. How, if at all, has the cost of pet healthcare influenced your decisions about pet care and maintenance? (% Total)



(Source: Ipsos survey conducted Jan. 10-13, 2025, among 725 U.S. adults who say they own a pet.)

Carmichael: How will the relationships between vets and clients shift with these changes?

Brannan: We're going to see different channels and ways of connecting pets to vets. Vets will always be the heart of what we do and of the industry. But there will be a proliferation of channels with different ways of connecting with a vet. That will create efficiency and quicker diagnoses.

Carmichael: How are attitudes about health changing how humans think about pet health?

Brannan: It's a mutual relationship. The informed view on health and how we want to live and keep ourselves healthy as a human being is translating into pet care. But the flip to this is also understanding the positive impacts pets have on us and our physical and mental health.

Carmichael: Are there ways to encourage more of that?

Brannan: If people can have pets, it could help the reduction of *their own* healthcare spending, but we still have some barriers to pet ownership. In the U.S., for example, people who are looking for rental homes can struggle to find pet-friendly housing. There's also making public spaces more accessible for pets or the ability for people to take pets on vacation with them.

Carmichael: Could workplace benefits for pets, like having them covered by traditional health insurers or work benefits that cover pet insurance, help with the cost of pet ownership?

Brannan: The People and Animal Wellbeing Act, which was introduced in Congress late last year, would allow the use of HSAs, or health savings accounts, for funding veterinary care. Pet insurance adoption is less than 5% in the U.S. In the Nordics, it's getting close to 50%. The U.K. is closer to 30%. So, we see a huge opportunity for insurance and wellness plans to play a much bigger part in affordable care. There needs to be more collaboration with the role we play, the veterinarians, policy makers, and insurers. We can all put our arms around this and collaborate.

Carmichael: Does the reverse work in our awareness of our pet's health factors into our awareness of our own health?

Brannan: It can only be positive. If you're thinking about your preventative care for a dog or a cat, humans don't have to be concerned with fleas and ticks, but the education around the importance of this preventative care and thinking about what we need to do in terms of our own health, I think that's always a very good prompt.

Matt Carmichael is editor of What the Future.



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How brands can balance price and premiumization in evolving markets

Today, our love for our pets has driven a surge in demand for premium pet healthcare, from nutrition to targeted therapies. But it's also creating a top-heavy marketplace, which could price some Americans out of pet ownership.

Whether they specialize in pet penicillin or organic kibble, pet healthcare brands — like those in any sector — face renewed pressure to clearly communicate their value to Americans across the economic spectrum.

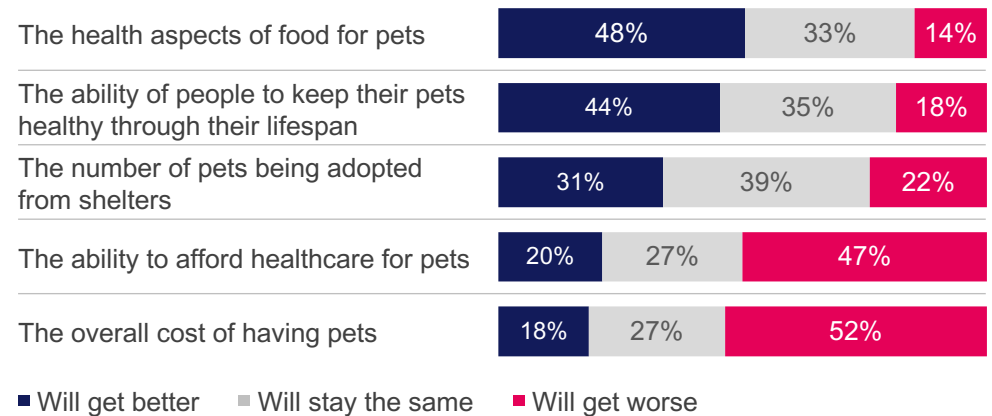
Market research can play an important role in ensuring that products line up with Americans' expectations and expenses. Instead of launching one-size-fits-all offers, brands can tap real-world qualitative and quantitative data to develop tiered products at a range of prices, supporting growth across the board. The brands that understand diverse consumer needs and adapt accordingly are more likely to achieve sustainable growth.



Keri Christensen is a senior director in Ipsos' U.S. Qualitative practice.
keri.christensen@ipsos.com

Americans are hopeful for pet health but are skeptical about future costs

Q. In the next few years, do you think the following will get better or worse, or will they stay the same? (% Total)



(Source: Ipsos survey conducted Jan. 10-13, 2025, among 817 U.S. adults who say they own a pet or intend to get one in the next year.)

How humanizing pets is reshaping pet owners' habits



Yvonne Hsu

President, general manager, U.S., Hill's Pet Nutrition

Pets are becoming more prominent in our lives. As humans become more aware of the connections between their own diet and health, they are also more aware of how food impacts their pets' health. Hill's Pet Nutrition's Yvonne Hsu knows that people want to feed their pets more human food. But she also knows that even if a pet food doesn't appeal to people, it might appeal to pets. This is just one of the many tensions she faces as she plans for future offers and trends.

91%

of U.S. pet owners ages 18-34 say it is important for them to purchase pet foods and treats that promote specific health benefits, such as gut biome improvement or joint health.

(Source: Ipsos survey conducted Jan. 10-13, 2025, among 725 U.S. adults who say they own a pet.)

What The Future interview with Yvonne Hsu

Matt Carmichael: How are demographics around household formation changing who owns pets?

Yvonne Hsu: I like to believe that pets are universal, and everybody could benefit from having a pet in their lives. We know having pets is a big trend that has happened over the last few years. We expect that to continue.

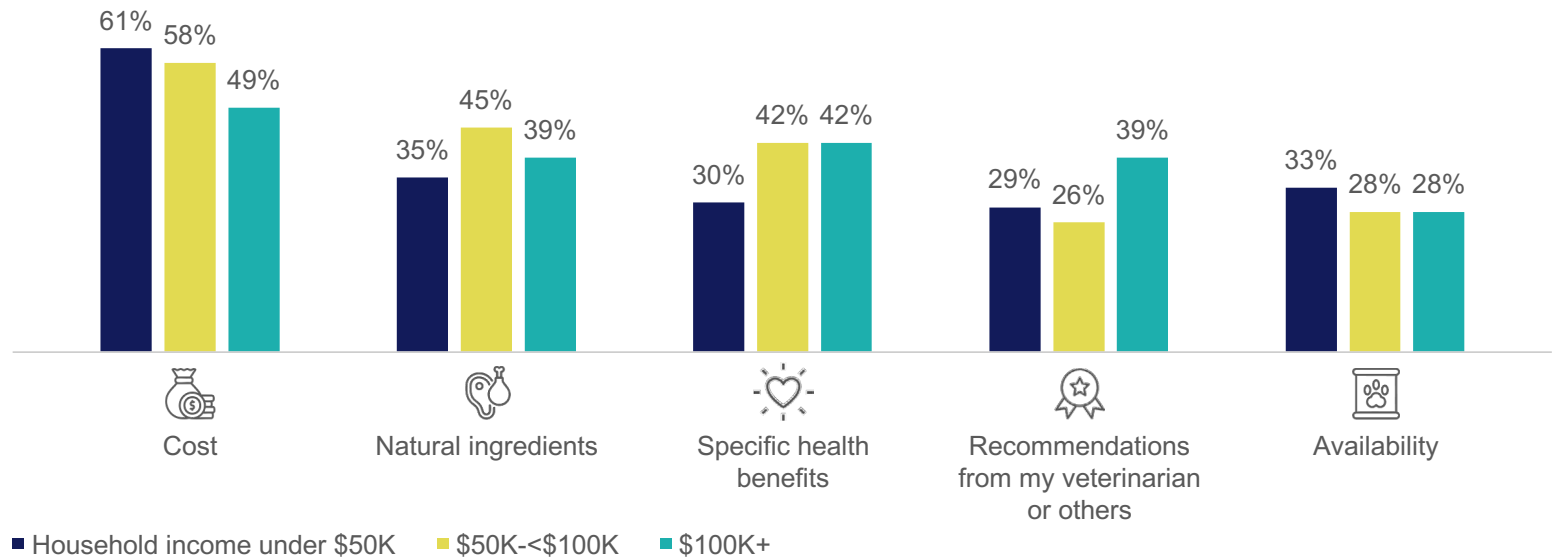
There's a staggering statistic from the U.S. Census that there are now more households with pets than children in the U.S. You would expect to see more Millennial and Gen Z folks making a choice to have pets even over having children. It elevates their importance in the household.

Carmichael: We're even elevating them to human status now, aren't we?

Hsu: The humanization trend has been here for a long time, but it has manifested in different ways. There's a focus on making sure that pets are stimulated mentally and emotionally in addition to physically. So you see more toys and experiences that allow you to make sure you are driving that mental engagement. But you also see differences in behaviors.

Cost, ingredients and income are top factors in Americans' pet food choices

Q. What are the top factors you consider when choosing food for your pet(s)? (% Total)



(Source: Ipsos survey conducted Jan. 10-13, 2025, among 725 U.S. adults who say they own a pet.)

Carmichael: What kinds of behaviors?

Hsu: Dogs used to sleep in the barn, then in the house and now in the bed with you. That affects choices people are making. People are investing

more in their pet's comfort, health and happiness. From custom furniture to tech gadgets, feeders to standing grooming appointments, pets are family and are treated as such.

Carmichael: How does humanizing pets shape food choices?

Hsu: The humanization trend used to be about making sure everything was natural, to having the right ingredients, to feeding food that looked like human food. Now it's, "I want to feed my pets something that I would eat myself."

Carmichael: There are many parenting styles of children. How does that translate with "fur babies"?

Hsu: We have found that behavior toward pet nutrition has more to do with feeling that sense of accomplishment as a pet parent, being at your best. Three-quarters of pet parents are doing something to transform the food. It could be as simple as adding water to kibble. They want to make sure they're doing the very best for their pet because they're not there all the time. Conversely, as your kids get older, they have more of their own lives. Your worlds collide in important moments of connection, love and support rather than an ongoing, daily responsibility and attention. The pressures and experiences are different.

Carmichael: Many humans are using food more deliberately for functional or performance reasons. Do you see that with pet nutrition, too?

Hsu: Yes. You could feed your pet Science Diet and that is going to be good for every single pet out there.

But we know that there are specialized needs, whether it is something the pet parent has observed or whether it is something that they have heard from their vet. We have a full specialty line that really taps into this insight of what are the specialty needs a pet might have. And, of course, we have our therapeutic line that is specifically for pets that are sick.

Carmichael: Does pet nutrition sometimes lead human food innovations and trends?

Hsu: Obesity is an issue with pets, too. We have metabolic food in which 96% of pets who eat this food every day lose weight in two months. The comment from people is always, "Why can't I get that food?" Well, people probably would, but humans don't eat the same things every single day.

Carmichael: What other trends are having an impact?

Hsu: Sustainability. We believe that is going to be a continued pressure and trend especially with younger generations. They will make more decisions based on the sustainability impact of brands and products. We have a partnership with Bond Pet Foods for a fermented protein we plan to roll out in the future that helps us deliver animal protein while significantly reducing our carbon emissions.

Matt Carmichael is editor of What the Future.



Behavior toward pet nutrition has more to do with feeling that sense of accomplishment as a pet parent, being at your best."

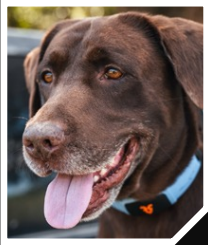
How AI could revolutionize how we connect with and care for our pets



John McHale

CEO, Personifi AI

Shazam is trying to make it possible for your pet to communicate what it's feeling in human language. It reads data from sensors, AI and other tech on pet collars to listen to and sense the pet's environment, track its movements and vitals, and even tie in weather data to, say, warn you if you've left your pet in a hot car. Then it uses voice actors and personas to represent the pet. For CEO John McHale, it's a fun way to better care for our pets and help them better care for us, too. Beyond that, he believes this tech could help us to connect even more deeply with our pets.



Roscoe

John's
Chocolate
Lab, age 6

76%

of Americans ages 18-34 are interested in using technology to better understand their pet's thoughts and needs.

(Source: Ipsos survey conducted Jan. 10-13, 2025, among 817 U.S. adults who say they own a pet or intend to get one in the next year.)

What The Future interview with John McHale

Matt Carmichael: Can we start with a quick overview of what the Shazam Band even is?

John McHale: It snaps on your dog or cat and brings them to life in fun and meaningful ways. The fun things are that the pet can converse with their owners, express their needs and feelings, and tell their owner if they forgot to feed them. They can also banter with you. It's pet science meets machine learning meets ChatGPT meets Hollywood.

Carmichael: The band uses sensors, so it's reading the pet and its environment. But it's also reading you, the owner, too, right?

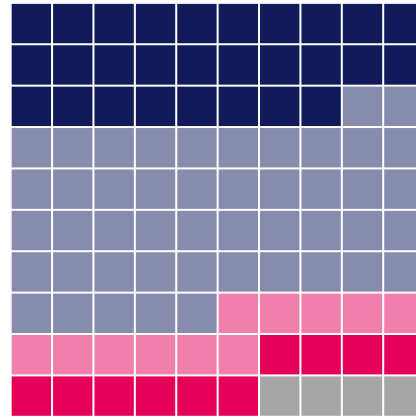
McHale: We are what we call empathic AI. Not only is the pet better cared for, but it brings real joy and meaning to humans as well. The pet can determine your emotional state automatically just like a human can. Shazam listens to the owner's change of voice, whether they're laughing or whether their tone has turned sad. We look at the context of a statement using AI.

You could be sitting on the couch, and you've talked to your pet. If your pet determines that you're sad, it's going to jump up on the couch, right? But now the pet is going to verbalize that it understands that you're feeling a certain way and gives you support.

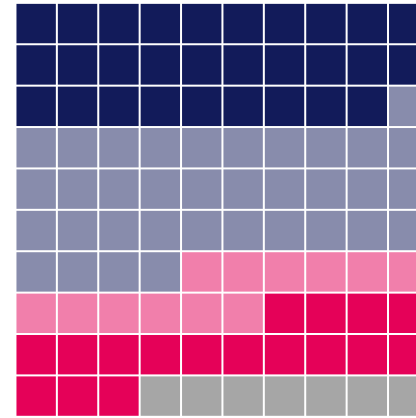
Younger adults show more interest in pet translation technology

Q. New technologies aim to "translate" a pet's vocalizations and behaviors into human language using AI. How interested, if at all, are you in using technology to better understand your pet's thoughts and needs? (% Total)

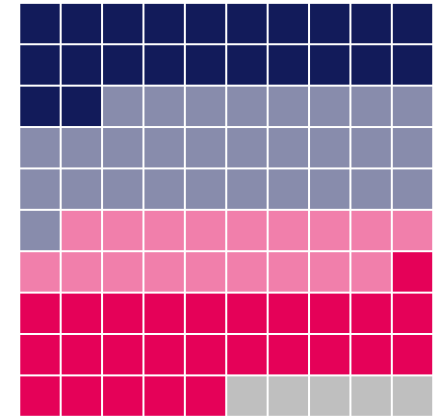
Ages 18-34



Ages 35-54



Ages 55+



■ Very interested ■ Somewhat interested ■ Not very interested ■ Not interested at all ■ Don't know

(Source: Ipsos survey conducted Jan. 10-13, 2025, among 817 U.S. adults who say they own a pet or intend to get one in the next year.)

Carmichael: Part of the idea for this came after your dog was bitten by a rattlesnake. Would Shazam know that had happened?

McHale: Yes, we have something called a pet lab, and we've collected thousands of data points. We have pets that come in all day long, and we run them through a two-hour set of tests to train our AI about how they move, when they jump, how they shake toys. And we've integrated the sounds of thousands of rattlesnake rattles into our neural networks. That's a niche feature. But we listen for a lot of other things that are dangerous to the pet. If we're hearing traffic in the background, we've developed technology that uses different sounds to warn the pet that they're going the wrong way. Then the owner's voice will come out of the band and tell the pet to turn around and go home.

Carmichael: Shazam has different personalities for the pets. Can it voice disdain and sarcasm for cats?

McHale: There are personalities like that, for sure. We have 27 personas that people can select from for their pets. That'll continue to grow.

Carmichael: Can you turn off the voice, too?

McHale: You can say, "Hey, be quiet," and adjust the verbosity. It's all up to the user.

Carmichael: There are interesting implications with older audiences, where the pet becomes even more of a companion. What will that mean in the future?

McHale: We think about the loneliness epidemic today. It definitely brings your relationship to a whole new level.

Carmichael: Can it integrate with other technology?

McHale: Down the road, we'll be looking at integrating with a lot of other technologies. And now you can speak a fence into existence. You can be out on a hike and say, "I don't want you to get more than 100 yards from me!" And when the pet does, our turnaround sequence kicks in with voice and tones they're trained on, and it will turn around and come back.

Carmichael: What other data does this collect? I imagine pet pharma or food brands could use this to scale understanding of how people and pets interact.

McHale: You can enter in the app what things stress your pet. If you're not home, and it's encountering those things, you'll get a text from your pet saying, "Hey, there's some loud noises over here. It sounds like thunder." You can immediately just start soothing your pet from where you are. You can't leave a kid at home that's got anxieties, right? They can't take care of themselves. So why leave your pet at home like that?

Matt Carmichael is editor of What the Future.



It snaps on your dog or cat and brings them to life in fun and meaningful ways. ... It's pet science meets machine learning meets ChatGPT meets Hollywood."

How community panels help brands tap into growing trends

Brands have scaled up quickly to keep up with the fast-growing pet product market. To succeed, this market evolution requires them to tap into the more subtle (and perhaps more significant) shifts in how Americans relate to their pets.

72%

of Americans say they will pay whatever expenses are needed to care for their pet(s), regardless of the cost.

(Source: Ipsos survey conducted Jan. 10-13, 2025, among 725 U.S. adults who say they own a pet.)

As the market for pet-related products grows, the brands that can understand and anticipate shifts in pet owners' needs are the ones that will win big. One method for gathering those essential insights into pet owners is the use of community panels.

By holding real conversations with a curated group of Americans, brands can understand and empathize with the perspectives behind their purchases. For instance, a panel with pet owners to reveal the social and emotional factors behind the humanization of pets — could lead to premium products that answer unmet needs, inspire innovation in pet tech and healthcare, or inform a marketing plan that people can really relate to.

From the pet sector to other lifestyle-based groups, these panels can inspire product designers and ensure that marketers are barking up the right tree.



Kristy Click is a senior vice president and senior client officer.

kristy.click@ipsos.com

What elevating pets in our families and society means for business



Shelly Volsche

Affiliate faculty at Boise State University

Today, we increasingly regard pets as equal members of our families — and even society. For many people, that means having a fur baby in place of human children. For whatever reasons or lifestyles, this pattern is changing how we live, shop, work and travel. Anthropologist and animal welfare expert Shelly Volsche explains how pets replacing kids is not just a passing fad but a significant cultural shift with far-reaching future implications for workplaces, restaurants and urban planning.



Lucy

Shelly's Pug,
age 17

4x

as many adults ages 18 to 34 (31%)
than those ages 55+ (7%) say they have
pets but no kids because of the cost.

(Source: Ipsos survey conducted Jan. 10-13, 2025, among 485 U.S. adults who say they have a pet but not a child.)



What The Future interview with Shelly Volsche

Kate MacArthur: You wrote a book called “Voluntarily Childfree: Identity and Kinship in the United States” about people having pets as surrogate children. For what reasons do people choose to have pets instead of children?

Shelly Volsche: Some are very personal in the sense that maybe somebody was an only child, or they may have had some sort of trauma they don't want to pass on. There are certainly those who are thinking about environmental consequences of overpopulation. Quite a few participants expressed a preference for pets in their lives.

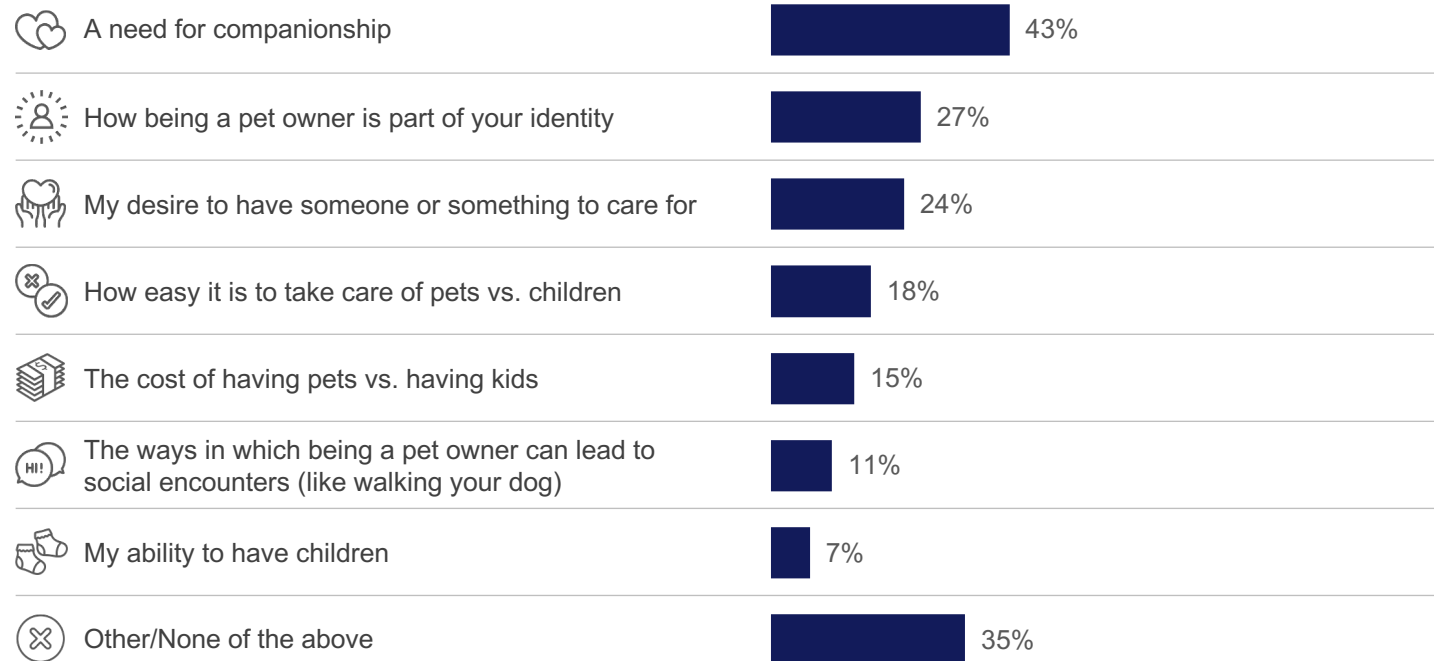
But there's this parallel life orientation to traditional parenting that is more of a professional and personal fulfillment avenue, and that seems to come along with these major demographic shifts in culture.

MacArthur: What does having pets instead of kids fulfill for people?

Volsche: We have that outlet for nurturing. But a lot of people who choose not to have children still want to have something that they care for, something that they invest in. And that's actually how I define pet parenting: It is the investment of time, emotion and finance that mirrors human parenting.

Child-free people with pets choose them for companionship and identity

Q. In previous questions you indicated that you have pets but do not have children in your household. Which of the following factors, if any, did you consider in having a pet instead? (% Total)



(Source: Ipsos survey conducted Jan. 10-13, 2025, among 485 U.S. adults who say they have a pet but not a child.)

MacArthur: How will pets fit in families in the future?

Volsche: I don't think we're going to see families stop having pets, but the types of pets they have may shift. Globally, just like we saw with human parenting, you're going to see a reduction in the number of pets so that you can give each of them better lives. As families live in increasingly urban spaces, you'll see a reduction in the size and types of pets. When it comes to families with children, I think that we're going to see a return of some of those smaller, pocket pets.

MacArthur: Do you see tensions emerging between pet parents and non-pet parents?

Volsche: The tension is going to be coming from those who are embracing their pets as part of human society and those who aren't. Things like whether or not your pet goes to the restaurant. And the same thing with airline travel. From a marketing perspective, what you're going to see is an increase in companies and services who emphasize if they're pet-friendly and really highlight that as a selling point.

MacArthur: Is there a tipping point for how far society will allow pets to be elevated in society with humans?

Volsche: In a lot of ways, we are already making huge adjustments for our pets to be able to be treated like people. And you're seeing the debates about whether or

not they should be guardian versus owner. There are pros and cons to any of that. We're seeing it happening in other countries. Finland's president and his wife lost their dog, and it was a national day of mourning because that was like losing a child in that culture. This is not just a weird U.S. thing anymore, and that is going to make [pet equality proponents] very resistant to pressures against it.

MacArthur: Are people elevating animals above humans?

Volsche: Yes. And it is not just the U.S. Even pet parenting is rising in China. And if tomorrow somebody dropped a bomb, you're going to see a lot of people grabbing their pets before they go to their neighbor.

MacArthur: How might businesses accommodate for pets in the future?

Volsche: One thing I'm already seeing popping up is the idea of pet bereavement. There's going to be a demand for some sort of "paw paternity" leave, where people are bringing home a new animal. You might see the return in the airlines where you can purchase a seat and have your dog or your cat with you. The market for pet products is going to continue to change. There needs to be a balanced understanding of what individual species need and fulfilling that and marketing that better.

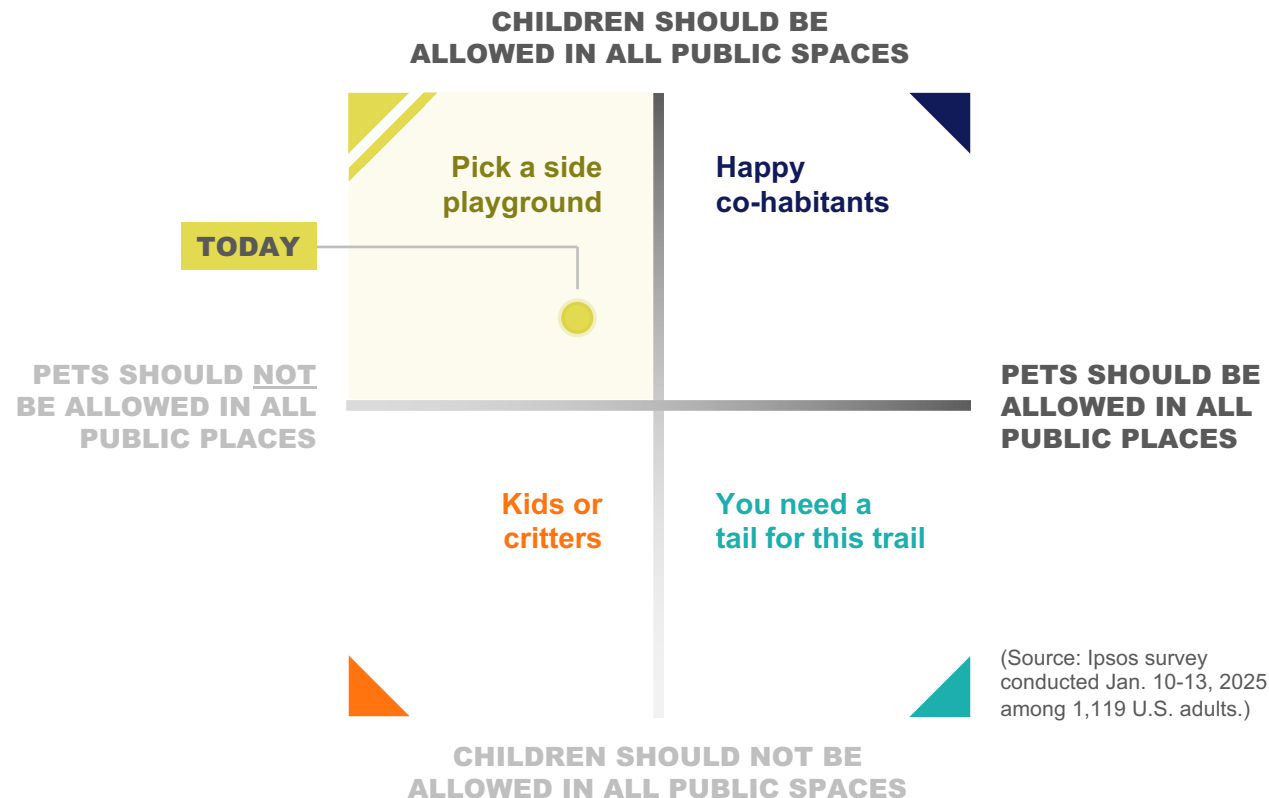
Kate MacArthur is managing editor of What the Future.



The tension is going to be coming from those who are embracing their pets as part of human society and those who aren't."

Who should be welcome in public spaces, kids or pets?

The future is always in tension. We can measure those contradictions today with forced-choice questions. We plotted two responses against each other in a classic 2x2 grid. If nothing changes, we'll stay where we are. But this way you can see how far opinion would have to shift to move us into a different quadrant in the future.

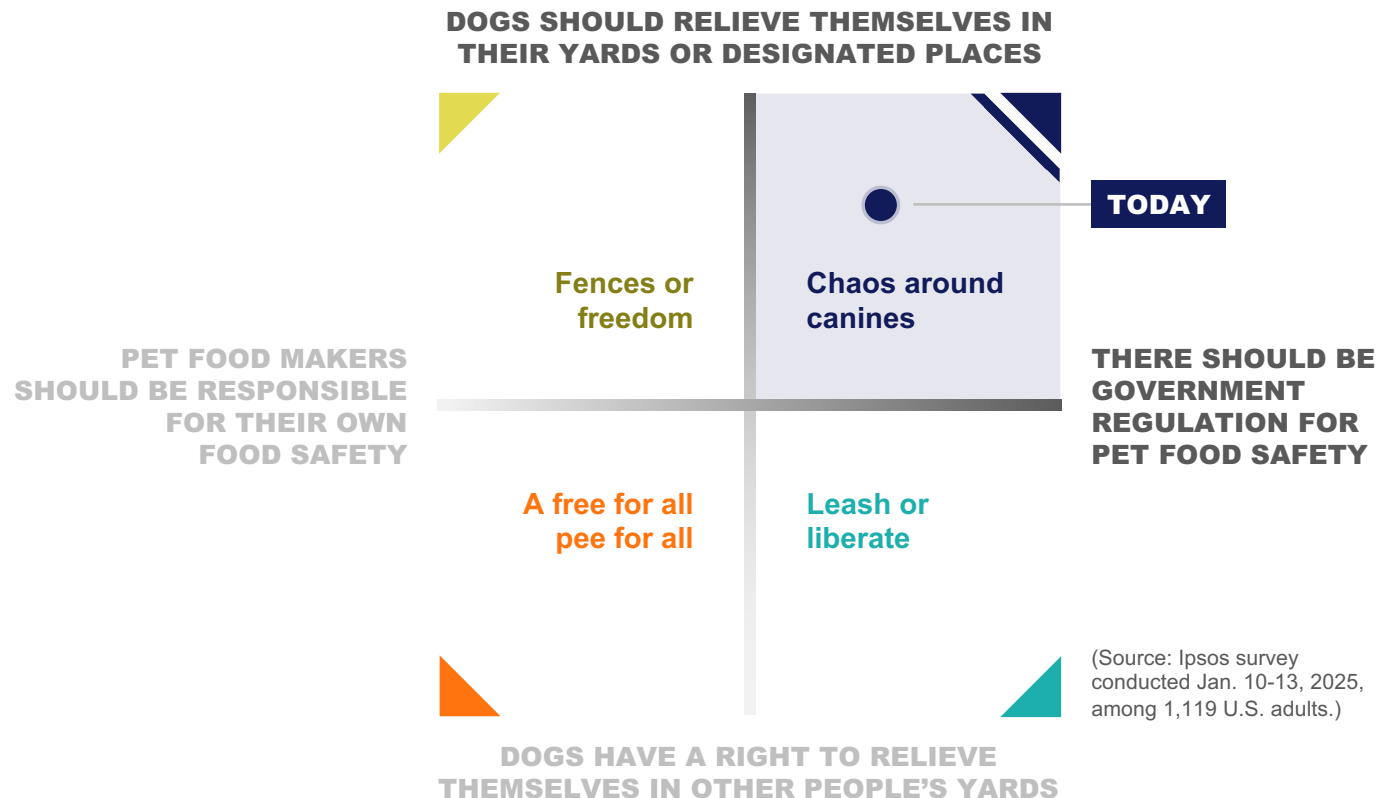


Today we feel that human kids should be allowed in public spaces, but pets should face some reasonable restrictions, like maybe not in places where food is served, etc. If this future continues, there will be a tension between where pets are allowed and where they aren't. Uncertain boundaries will become more awkward as our pets take on greater and greater prominence. Being pet-forward, or human-forward will go a long way toward clarity. Friction comes more from uncertainty (as in, "Is my pet allowed here?") than from knowing it's not allowed. That tension, coupled with the elevation of pets in our lives, is exactly what could drive us into one of the alternate futures.

Because let's face it, kids can be annoying in public, too. As pets become more prevalent and important to us, and kids become rarer (but still important!) look for more businesses to draw lines one way or another and more tensions to exist.

How we'll navigate the leashes vs. liberty of pet freedom

The future is always in tension. We can measure those contradictions today with forced-choice questions. We plotted two responses against each other in a classic 2x2 grid. If nothing changes, we'll stay where we are. But this way you can see how far opinion would have to shift to move us into a different quadrant in the future.



This tension sits oddly within a host of competing American values. On one hand, we have the role of government oversight, which we're not always fans of, but we often like some regulation, like when it comes to food safety. On the other hand, we have American property rights and a kind of Libertarian bent. Imagine a "Don't Tread on Me" flag, but with a dog lifting its leg on a well-groomed yard. It's a literal "Get off my lawn!" moment.

And it's funny, because in any urban-ish area, dogs get "walked" on other people's lawns all day. Everyone does it. Does this mean everyone hates that everyone else also does it? There's a tension.

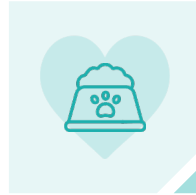
For us to shift to a different quadrant and a different future, we'd need shifts in our ideals about personal freedom, government oversight and property rights. But will our "anything for our pets" sentiment make that more or less likely?

Implications: Where the opportunities are for...



Pet-human experiences

- Lines between human and pet products/services further blur with buddy packages and cross-pollination of baby-to-pet products
- Expand entertainment content/events for simultaneous pet-human enjoyment
- Design pet-centric residential and public spaces by partnering with local services



Health/wellness

- Expand genetic engineering and develop new treatments and preventive measures based on gene editing
- AI and data analysis tools grow to personalize pet food, toys and other products based on advanced pet health monitoring systems
- Expand hyper-personalized, functional diet subscriptions, like anti-inflammatory, food allergies, dairy-free or gluten-free based on lab work



Technology

- Standardize pet care into smart home systems
- Implement AI-driven personalization of pet products and services
- Pet technology mirrors that of humans, including wearables, smart appliances and/or devices
- Create immersive VR/AR experiences for pet interaction and care
- Broader pet edu-tainment channels and apps integrated with speaking buttons for pets to choose



Travel/hospitality

- Create pet-specific seating and amenities in various modes of transportation
- Develop advanced pet travel accessories for safety and comfort
- Transform hotels from pet-friendly to pet-inclusive with a dedicated pet concierge with activities for pets to fully participate



Services/insurance

- In-home health services for aging pets to support grooming, medications and mobility/stimulation
- Encourage adoption of insurance and liability products for pets
- Include pet care in health savings accounts (HSAs)

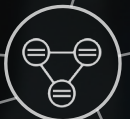
*With contributions from Ipsos'
Kristy Click, Jola Burnett and Matt Palmer.*

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Staff writer

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Kahren Kim *she/her*

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