

# IMPACT UNLEASHED 2025

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## Sustainability Trends in the Pet Industry Data, Consumers & the Power of Social Listening

*Alisa Hamilton (Harvest Insights), Shannon  
Landry (Packaged Facts), Ingrid Chu (APPA)*



pet  
sustainability  
coalition



# WHO, WHAT, WHERE OF SUSTAINABILITY MARKETING



# Our Goal Today



BONUS:  
Foster puppy  
pictures

- WHO

Who has a sustainability mindset?

- WHAT

What do they need to hear?

- WHERE

Where can you find them?

# THREE DATA SOURCES



## 1 Survey Data

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Yale Program on Climate Communication  
Proprietary Survey of Premium Pet Food Buyers

## 2 Social Listening

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Sprout Social queries

## 3 SMART Personas

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Built in a database of 250 million consumers

WHO HAS A  
SUSTAINABILITY  
MINDSET?



# EVOLUTION OF SUSTAINABILITY MINDSET



- Believe global warming is real, human-caused, and urgent
- Support climate policies



- Acknowledge the threat but see it as distant
- Support policies but prioritize other issues



- Unsure if global warming is real, human-caused or serious



- Know little about global warming
- Rarely hear about it in media

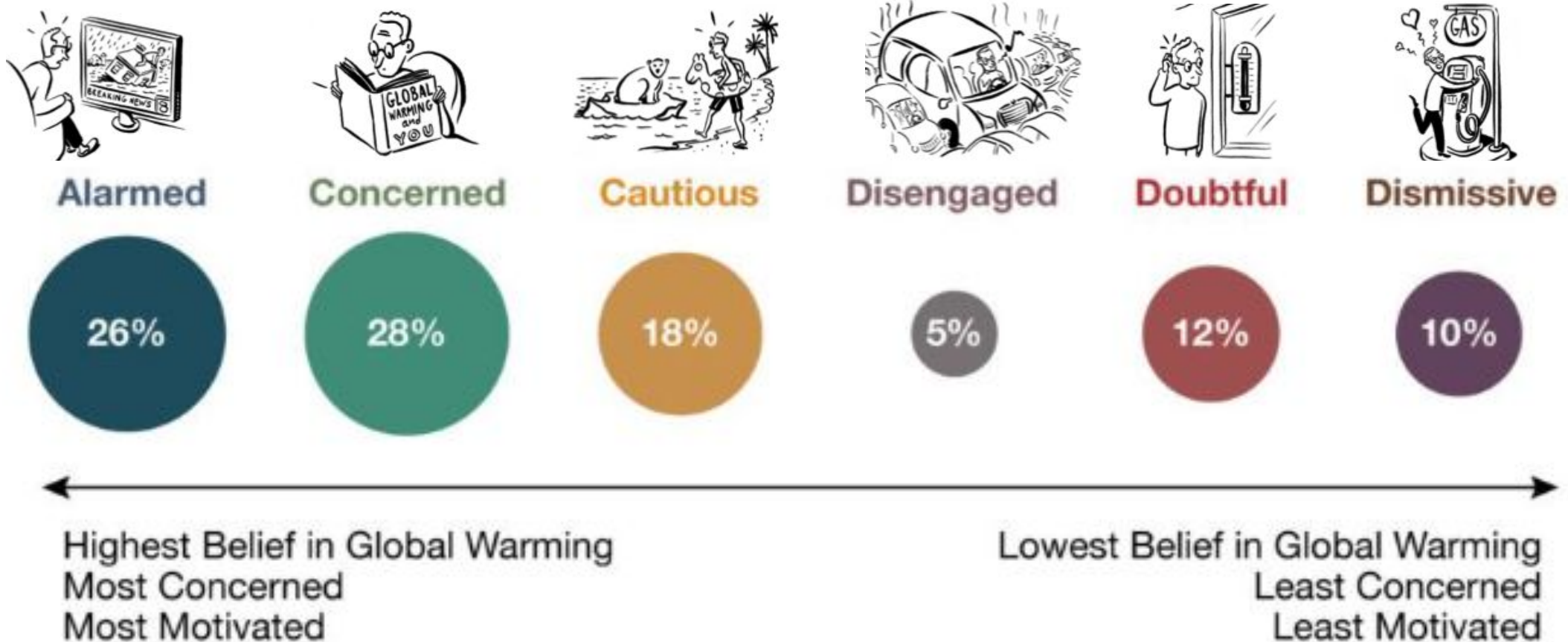


- Doubt global warming or see it as a natural cycle
- Don't view it as a serious risk



- Doubt global warming or see it as a natural cycle
- Don't view it as a serious risk

# WHERE ARE WE NOW?



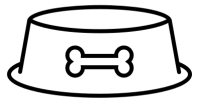
# RELATIVE TO PREMIUM PET FOOD BUYERS



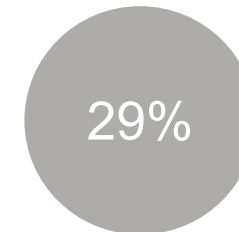
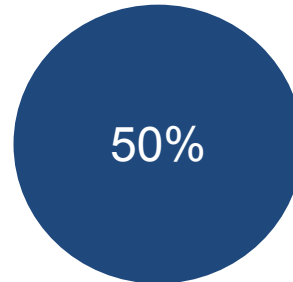
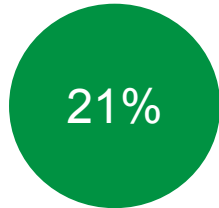
**ENGAGED**  
26%

**UNREALIZED**  
46%

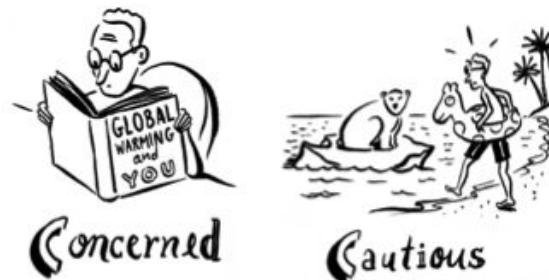
**DISINTERESTED**  
28%



Premium  
Pet Food



# SEGMENT DESCRIPTIONS



## ENGAGED

## UNREALIZED

## DISINTERESTED

- Tend to be younger (under 40)
- More likely to have children and live in an urban area
- More likely to feed raw or an alternative diet
- Spend 1.5x per month on their pet

- Higher percentage of females (60%+)
- Less likely to have children
- Don't have enough knowledge to know what makes a difference
- Sustainability may be part of their consideration set but not always for pet products

- Tend to be older and slightly lower income
- More likely to be Caucasian
- Driven more by price than other factors when shopping for pet
- Sustainability not a part of their consideration set

# CONCLUSION:

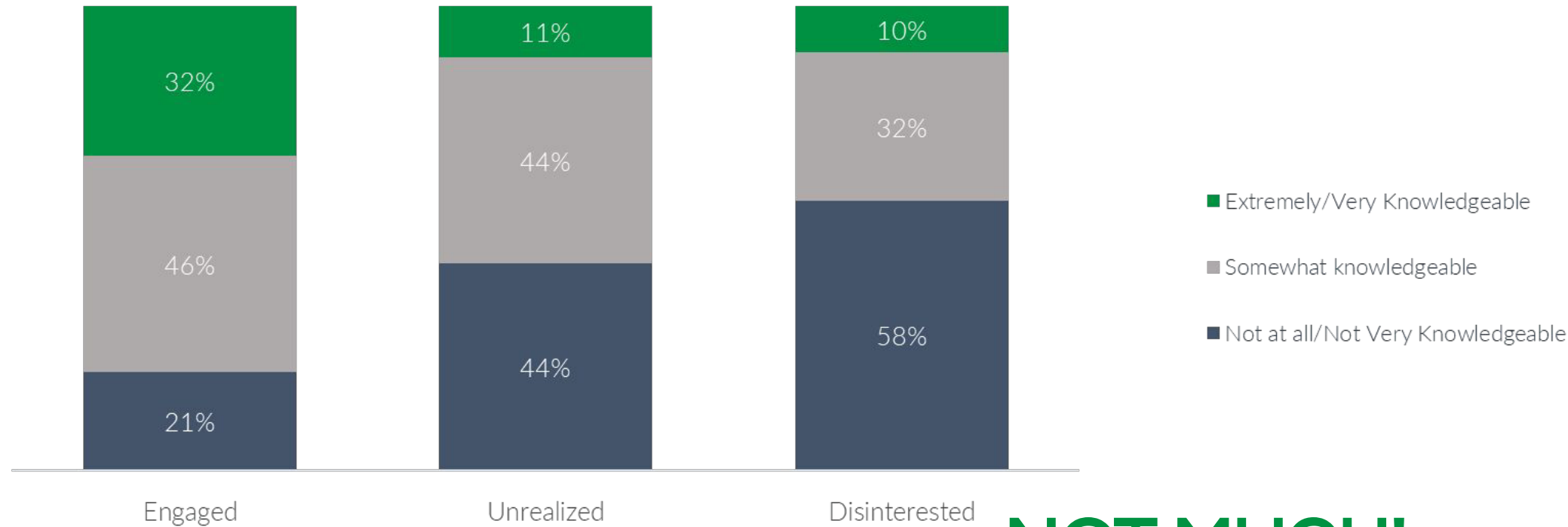
A large percentage of the market is at least open to your brand's sustainability story.

WHAT DO THEY  
NEED TO HEAR?



# WHAT DO THEY KNOW?

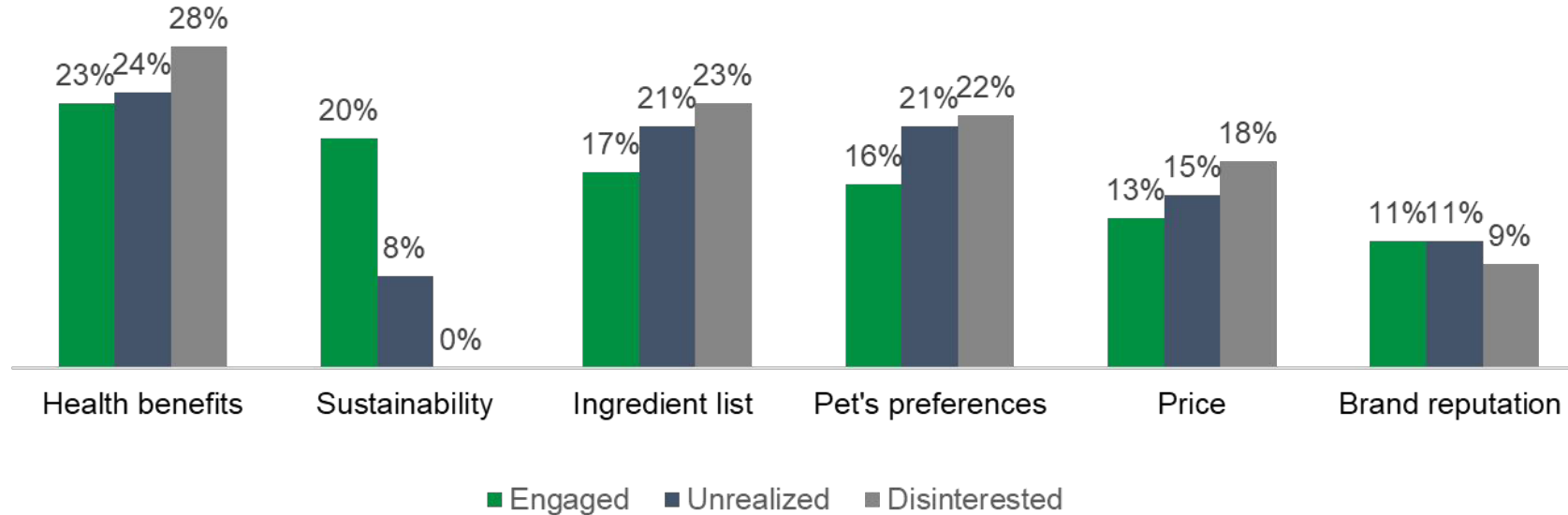
Self-reported knowledge of the environmental impact of pet food production



**NOT MUCH!**

# WHAT DO THEY CARE ABOUT?

Importance of Product Features in Purchase Selection



Data from Proprietary Study

A1. Imagine you have 100 chips to split between these six potential product features, based on how important they are to you in evaluating different brands of food for your pet.

# WHAT DO THEY VALUE?

**Nature:** Life is about protecting the environment.

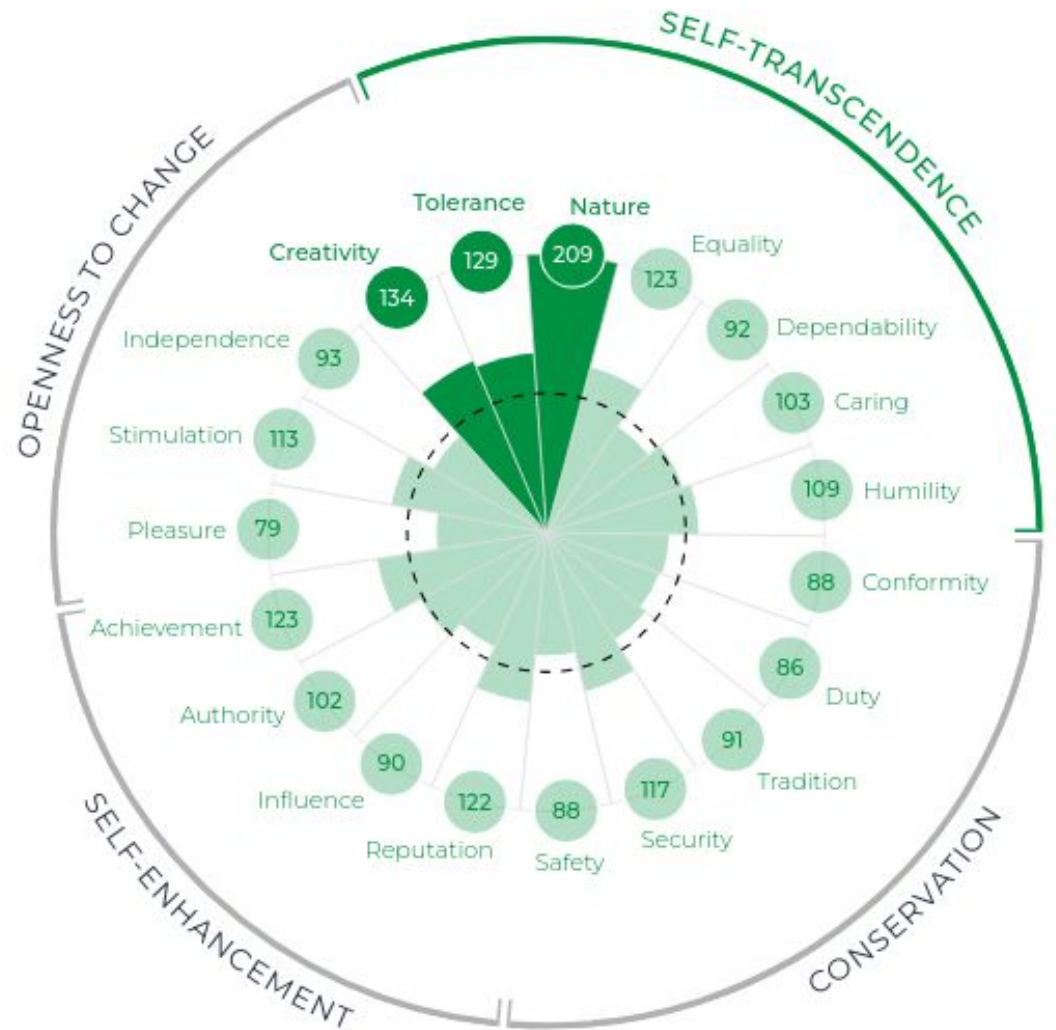
**Tip:** Consider using themes of unity with nature, safekeeping and conservation in your creative and messaging.

**Creativity:** Life is an exploration and learning about new ideas and being imaginative is important.

**Tip:** Consider using themes of innovation, originality, and cleverness in your creative and messaging.

**Tolerance:** Life is about accepting the beliefs and behaviors of others.

**Tip:** Consider using themes of acceptance, inclusion, harmony and diversity in your creative and messaging.



# CONCLUSION:

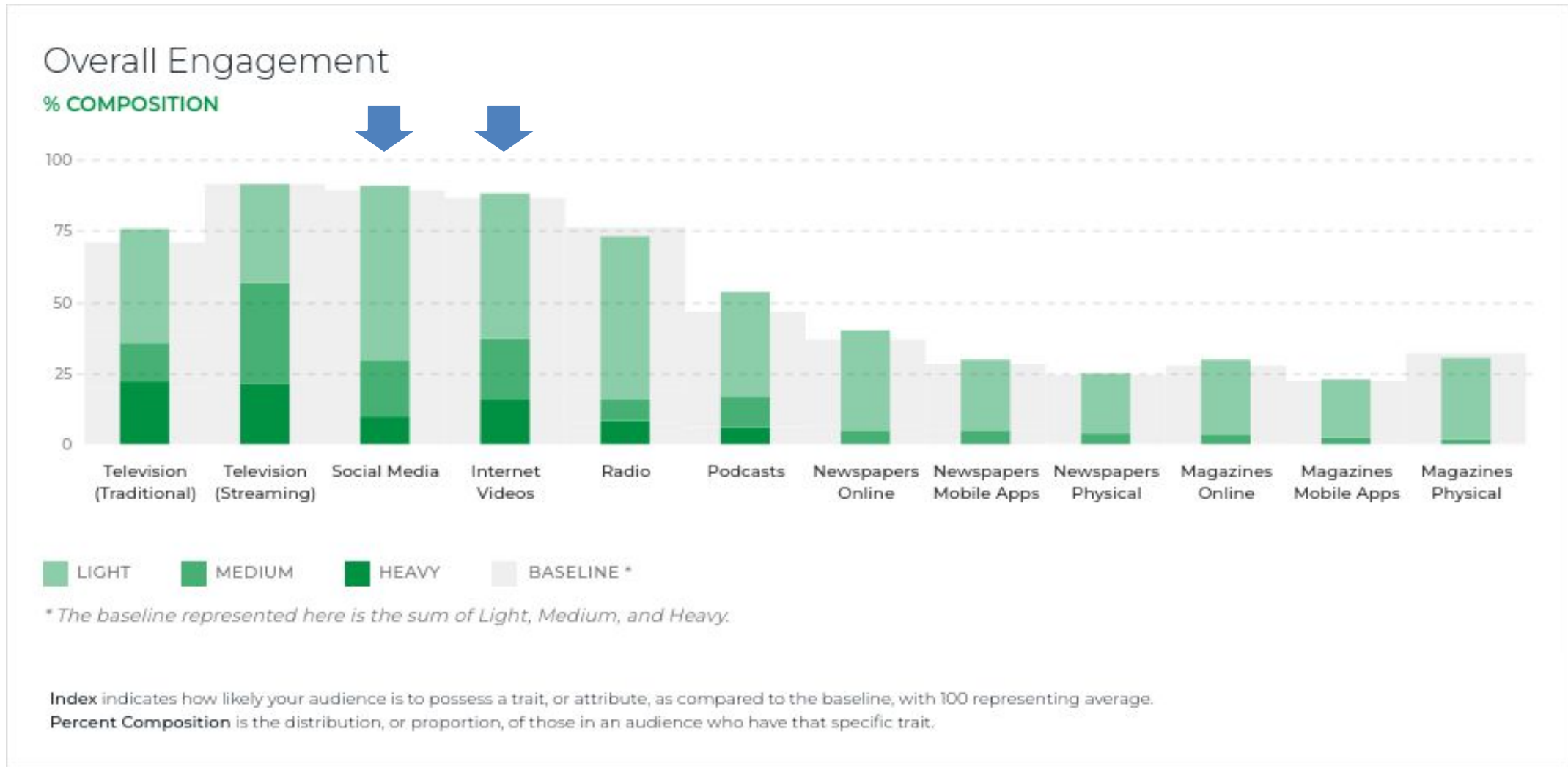
Effective Marketing will:

1. Educate
2. Inspire
3. Motivate

WHERE CAN YOU FIND  
ENGAGED  
CONSUMERS?




# MEDIA MIX




# Social Media



# WHAT ARE THEY TALKING ABOUT?

 X **Don Staniford** @TheGAAIA 2k+

If you're going to boycott Scottish farmed salmon then please add pet food to your banned shopping list - diseased fish from Scottish salmon farms can end up in the feed for dogs and cats #Pelagia @scotseafarms <https://t.co/CEo2mzNxZf>



86 Engagements

 X **Connor GPT** @connorgpt

🔥 Attention pet parents! 🚨 Major pet food recall in WA linked to bird flu outbreak! 🌿 🐾 Keep your furry friends safe! Check your pet food ASAP and stay updated for more info. 🐾 🐱 #PetSafety #BirdFluAlert #PetFoodRecall #WAnews 📄 Read more: [link]

1 Engagements

Positive Words: eco-friendly, sustainable, recycle, ethical, biodegradable, green innovation

Negative Words: boycott, outbreak, toxic, recall, shortage, contamination

1. Timely topics
2. Easily tied back to health benefits and ingredients
3. Insert sustainability message

# CONCLUSION:

**Sustainability-minded pet parents  
are video and social media  
focused**

# LET'S REVIEW

1. Sustainability importance
2. Intentionality in marketing
3. Video is key

**THANK YOU!**  
(APPENDIX AVAILABLE)



# YALE PROGRAM ON CLIMATE CHANGE COMMUNICATION

**4-question segmentation created & validated by Yale Program for Climate Change Communication: will classify into the Six Americas [read more here](#)**

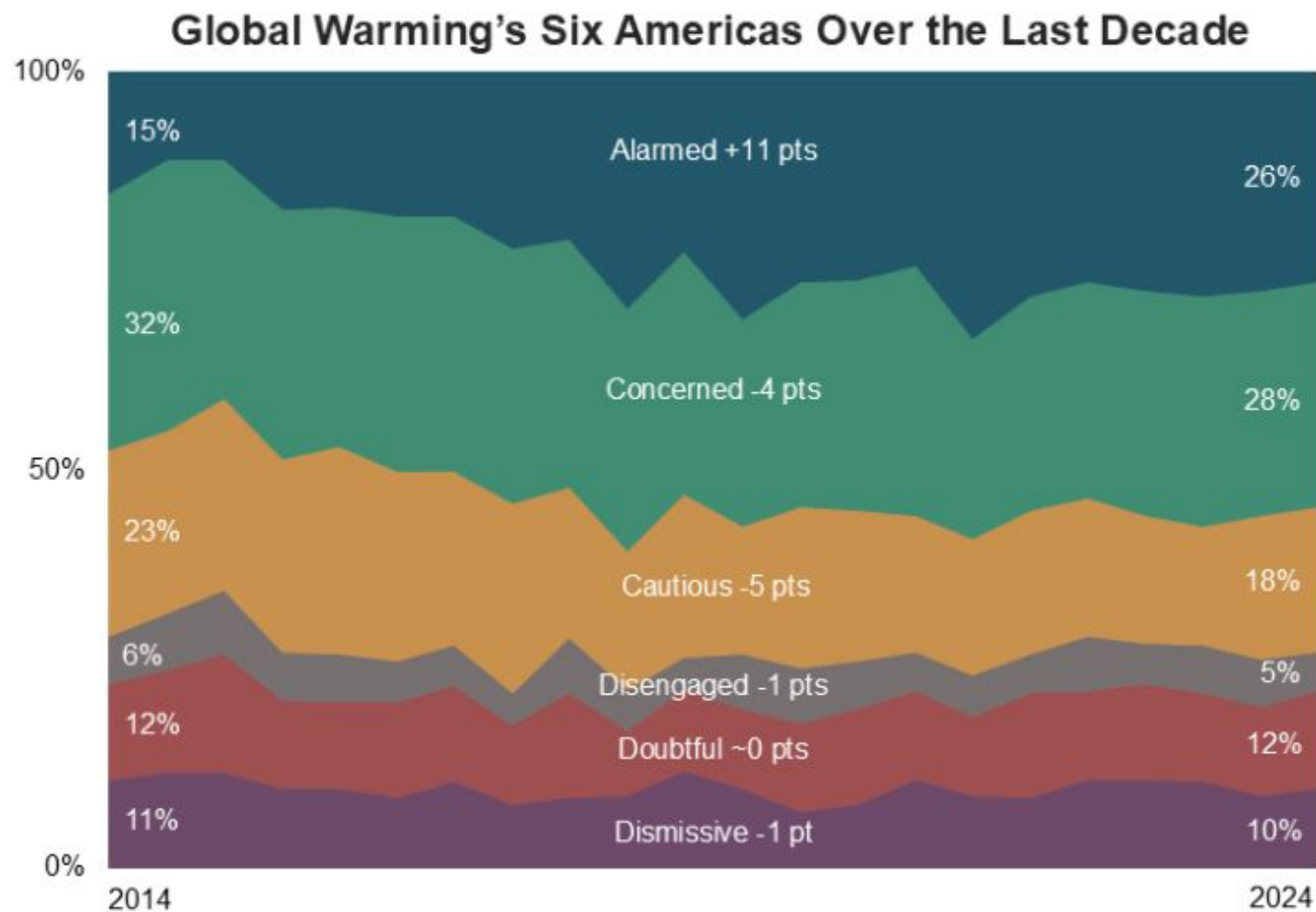
C30. How important is the issue of global warming to you personally?

C35. How worried are you about global warming?

C40. How much do you think global warming will harm you personally?

C45. How much do you think global warming will harm future generations of people?

# WHERE HAVE WE BEEN?



Base: 25,537 U.S. adults. Data include 22 waves of national surveys spanning April 2014 – December 2024.

Source: Yale Program on Climate Change Communication;  
George Mason University Center for Climate Change Communication



# **Sustainability Trends in the Pet Food Market**

**Barriers to sustainability  
among pet owners**

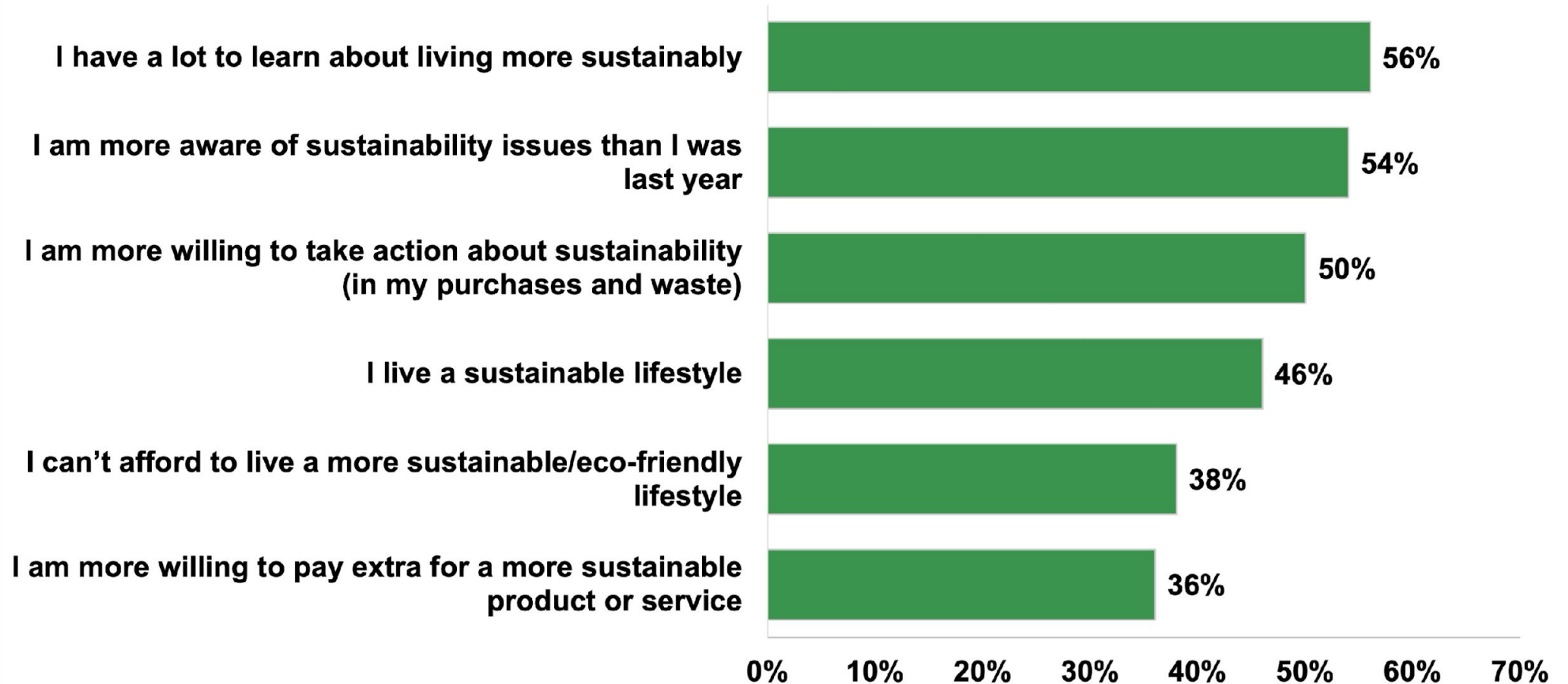
**Shannon Landry**

# Agenda

- **How pet owners view sustainability**
- **How it impacts pet owner purchases**
- **Disconnect in consumer attitudes**
  - **Alternative pet food ingredients**
  - **Eco-friendly packaging**
- **Wrap-up**



# Attitudes Towards Sustainability



Source: Packaged Facts March 2025 Survey of Pet Owners

# What Does Sustainability Mean to Pet Owners?

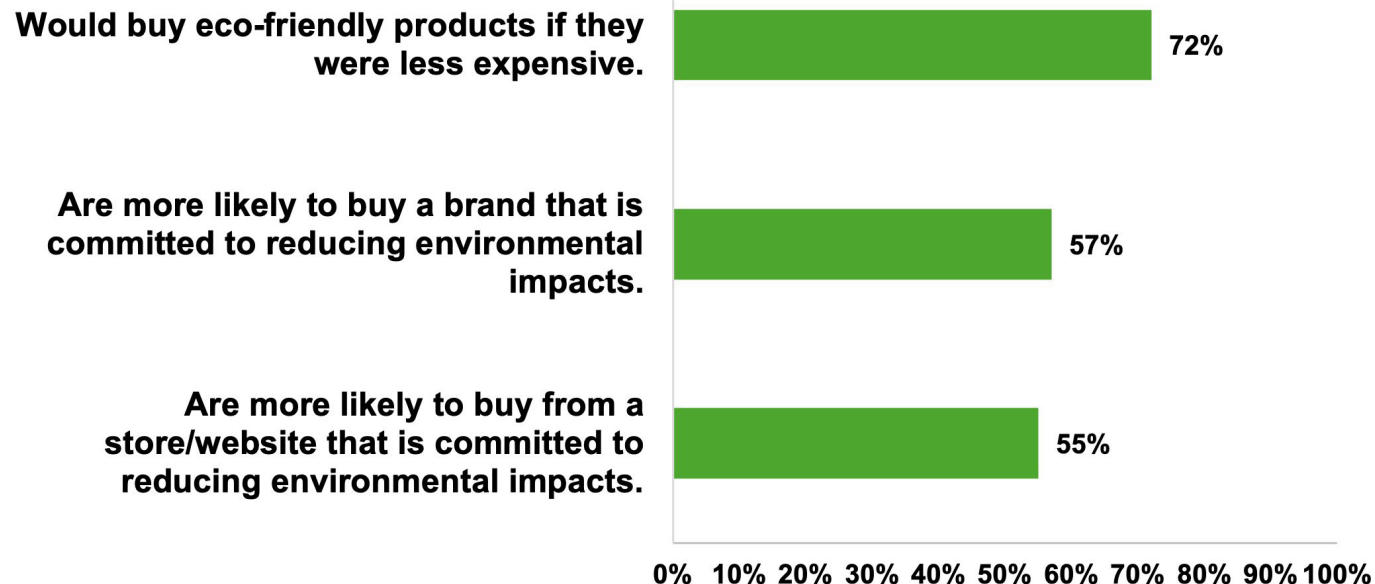


Source: Packaged Facts March 2025 Survey of Pet Owners

# Sustainability and Consumer Purchasing

## Pet Owners Want to be Eco-Conscious

### Pet Owners...



Source: Packaged Facts January 2025 Survey of Pet Owners

# Sustainability and Consumer Purchasing

But is there a DISCONNECT?

## Pet Owners...

Would buy eco-friendly products if they were less expensive. 72%

Are more likely to buy a brand that is committed to reducing environmental impacts. 57%

Are more likely to buy from a store/website that is committed to reducing environmental impacts. 55%

Are influenced by retailer/brand corporate values when buying pet products 13%

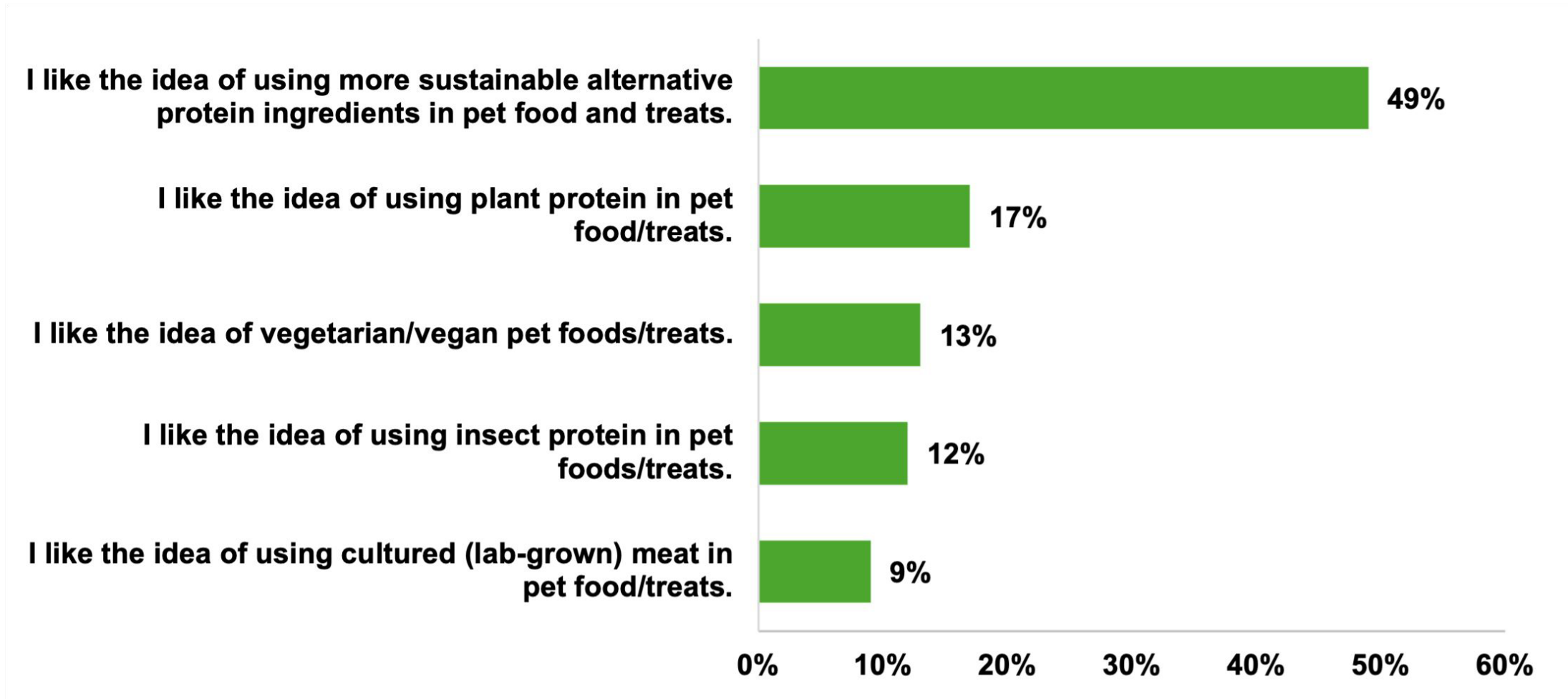
Are influenced by retailer/brand sustainability and eco-consciousness when buying pet products 13%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



Source: Packaged Facts January 2025 Survey of Pet Owners

# Alternative Proteins in Pet Food and Treats



Source: Packaged Facts August 2024 Survey of Pet Owners



# Plant-Based Protein Interest

## Plant Protein

17% of pet owners like the idea of plant protein in pet food/treats.

13% find vegetarian/vegan options appealing.

Plant-based is gaining ground in human markets.

Source: Packaged Facts January 2025 Survey of Pet Owners



Owners want to ensure their pet's dietary needs are met with plant-based protein alternatives.





# Insect Protein Acceptance

## Insect Protein in Pet Food

12% of pet owners like the idea of using insect protein in pet food and treats.

## Objections to Insect Protein?

Overcoming the “ick” factor



# Cultured Meat Considerations

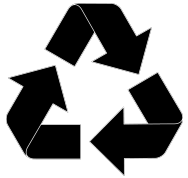


9% of pet owners like the idea of cultured (lab-grown) meat in pet food and treats

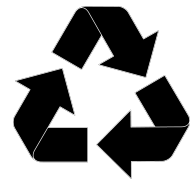


Pet food is on the leading edge of cultured meat development, but technology is far from mainstream use.

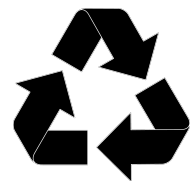
# Eco-Friendly Petfood Packaging



37% of pet owners are willing to pay more for recyclable pet food packaging.

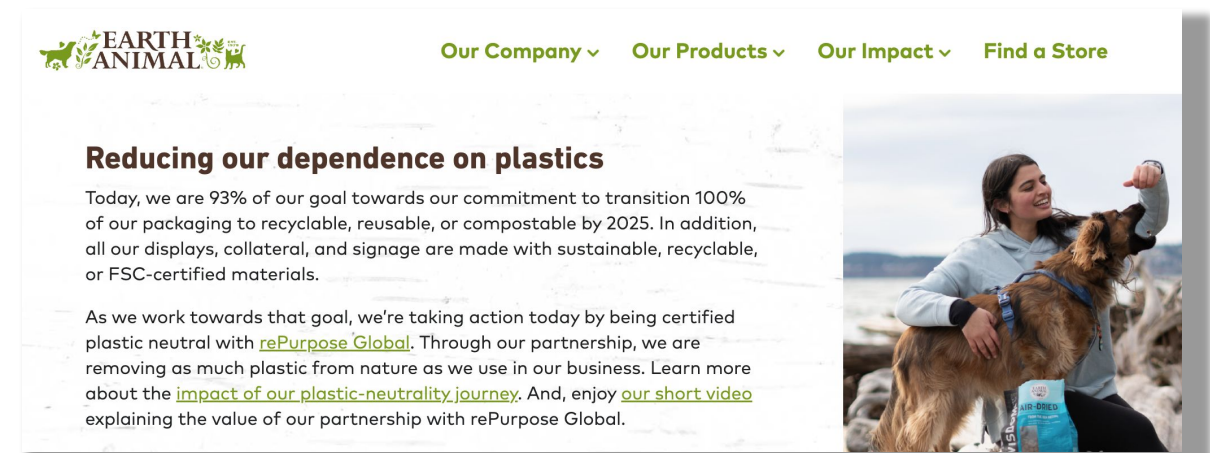
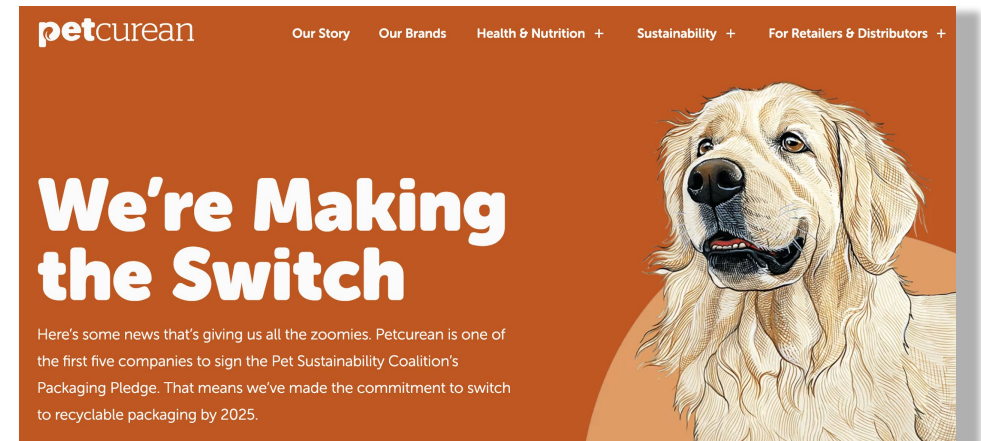


But only 18% of pet owners actually purchase sustainably packaged pet food\*.



More marketers are switching to recyclable options.

\* “sustainably packaged” is self-defined



# Wrap-Up

- Many pet owners want to shop sustainably
- Expense can be a hindrance
- Education is key in gaining acceptance for alternative proteins
- Eco-friendly packaging is gaining steam





**THANK YOU!**

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coalition

Moderator: Sophie Gildesgame



**Alisa Hamilton**

*Harvest Insights*



**Shannon Landry**

*Packaged Facts*



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