



Oral care: understanding pet owners' usage and attitudes and identifying their pain points

Thematic consumer survey
EUROPE, NORTH AMERICA, LATIN AMERICA

Global overview | November 2024

Summary

Introduction p.3

Perceptions & attitudes p.8

Uses & habits p.19

Perspective p.25

Key learnings p.28





Introduction

Methodology



CAWI online quantitative survey conducted via Explorer in **September 2024**



Locations: 6 countries across 3 regions:



EUROPE (EU): France, UK



NORTH AMERICA (NA): USA, Canada



LATIN AMERICA (LATAM): Brazil, Mexico



32 close-ended questions + demographics
N=2,400 respondents (400 per country, 800 per region)



Target: 100% cat and/or dog owners, aged 18+, fully or jointly responsible for purchasing pet food
NatRePP™ sample: population **nationally representative** of pet parents in each country on gender, age and regional repartition



Methodological note:

Data have been weighted to best represent the pet owner population of each market

All questions have been crossed by specific subgroups for analysis purposes:

- the country and/or the region
- the gender of the respondents: Men / Women
- the age of the respondents
- the pet: Cat / Dog

Statistical differences between subpopulations are highlighted as follows:

++ significant @95% confidence level
+ tendency @90% confidence level



Discover our story and meet our proprietary panel, exclusively dedicated to the pet world



EXPLORER
BY YUMMYPETS

You have questions. We have answers.
Uncover them with tailored market research and make smarter decisions.

Explorer connects with 3 million pet parents and is the leading consumer insights provider exclusively dedicated to the pet industry.

FRANCE UNITED KINGDOM UNITED STATES CANADA BRAZIL MEXICO

- Proprietary panel
- GDPR compliant
- High targeting
- Quick and responsive data collection
- 100% cat and dog owners
- National representative

Want to see what we can do?
We can send you our latest consumer report for free.
Send us an email: matthieu.glayvoz@symoise.com

Sustainability origin of the ingredients

YUMMYPETS © 2015-2024

2012 | THE SOCIAL NETWORK

In the early years, we developed YUMMYPETS, the social network with a strategic vision around data collection and enrichment.

We currently connect with more than 3.3 million pet parents from around the world.

2018 | THE PANEL

Because we had access to an abundance of data and because our community is highly engaged, we created EXPLORER, a dedicated and proprietary panel of pet parents.

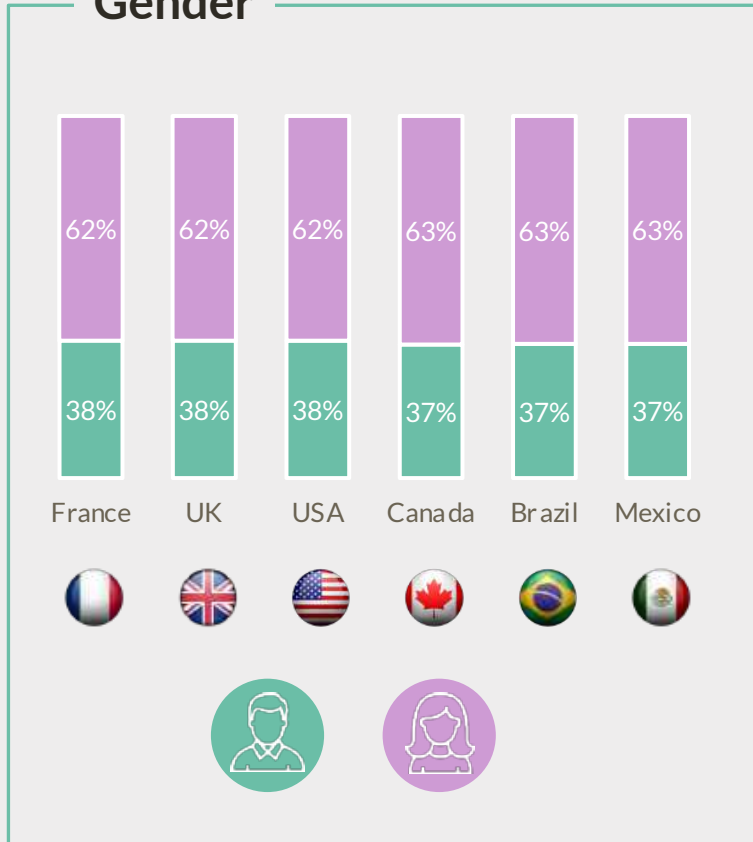
2023 | THE INTERFACE WITH THE INDUSTRY

We launch a customized platform for our clients: LOOP.
The first one-stop shop to access all our pet parent insights.

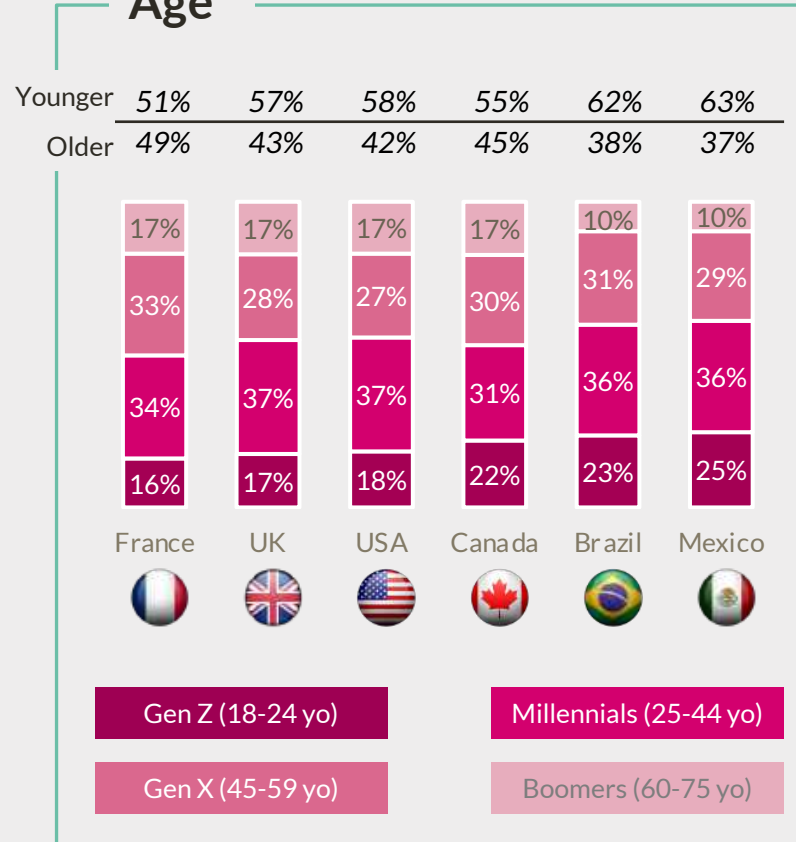
Sample profile (1/2)

Respondent base: TOTAL (6 countries) cat or dog owners 2,400 / France 403 / UK 403 / USA 403 / Canada 396 / Brazil 396 / Mexico 398

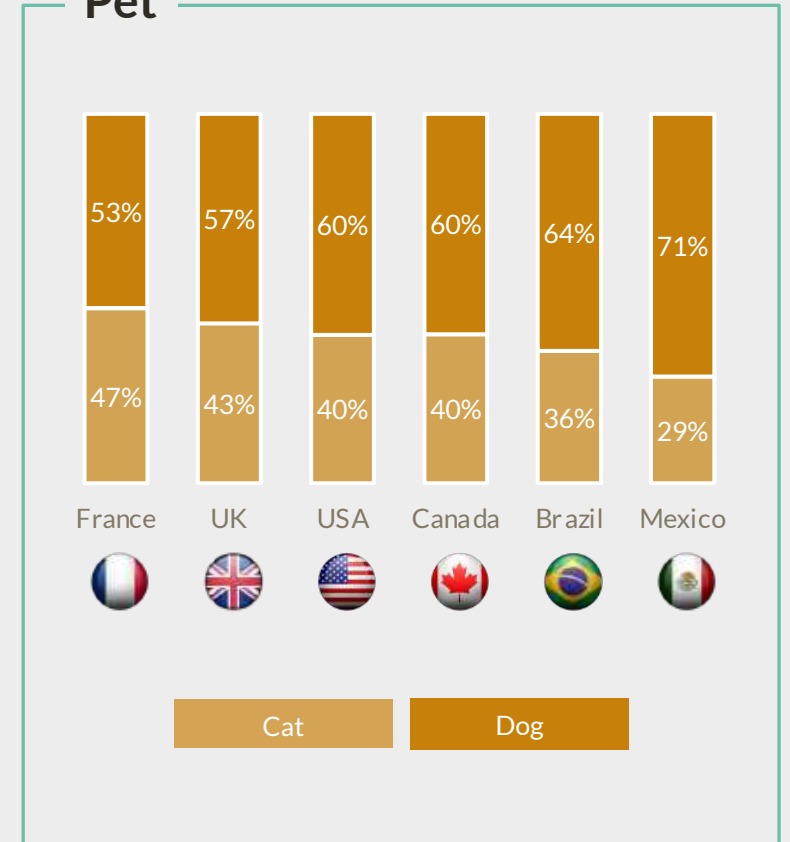
Gender



Age



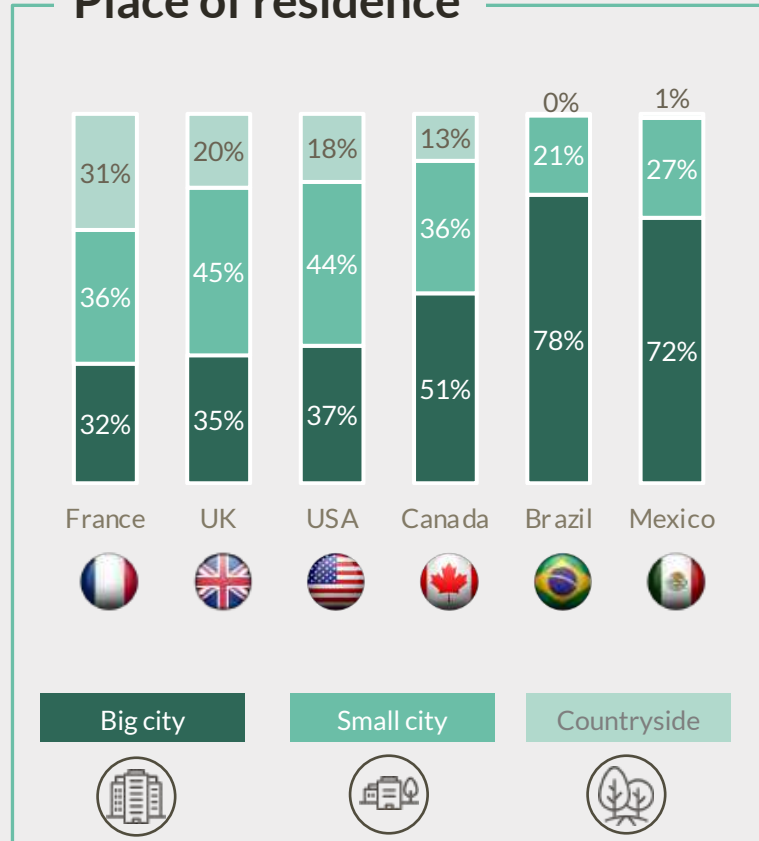
Pet



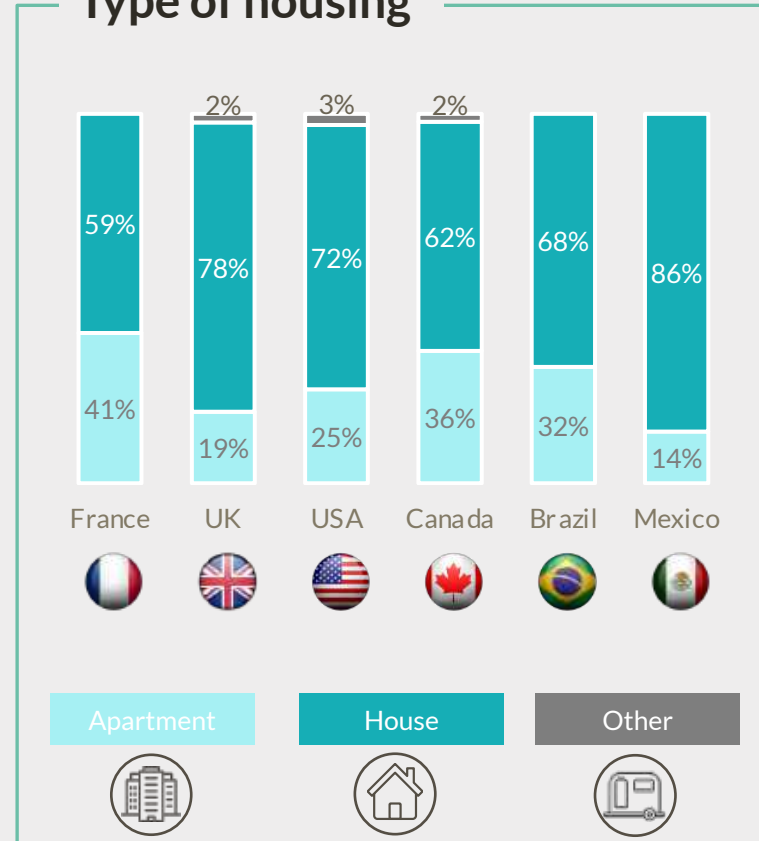
Sample profile (2/2)

Respondent base: TOTAL (6 countries) cat or dog owners 2,400 / France 403 / UK 403 / USA 403 / Canada 396 / Brazil 396 / Mexico 398

Place of residence



Type of housing



A person wearing a grey long-sleeved shirt is petting a grey cat. A golden retriever dog is sitting next to the cat, looking towards the camera. The scene is indoors, likely in a living room, with a wooden table visible in the background.

Perceptions & attitudes



The overall **health condition** of pets is considered **good** by their pet parents.

Pets considered **healthy**
by their owners

72%

CAN ++ 78%

Everyday health and
well-being is the **top**
priority for

52%

CAN ++ 62%
USA ++ 58%


Prevention is more a question of stance rather than of pets' health condition


The unhealthiness of their pets does not encourage pet owners to provide extra health care. Communicating about pets' health seems necessary to raise pet parents' awareness of the need to provide oral care.



PET HEALTH | Health condition

How would you characterize your pet's current health?

Respondent base: TOTAL (6 countries) cat or dog owners 2,400

 The **pets' age** has an impact on their perceived **healthiness**.
Pets that are considered healthy are **4.6 yo** on average vs **8.6 yo** for those that are considered unhealthy.

 **Cats** are considered **healthier** than dogs (**++76%** vs 70%) by their owners.


 **NA owners** declare a **higher level of healthy pets**, while they do not claim to provide more care for their pets or have younger pets.

The feeling that their pet is unhealthy **doesn't raise the mindfulness of pet parents** about providing care and, in particular, oral care:
++71% (vs 42% for healthy pets) said their pet had **at least one oral issue** within the past year



Though they **provide less oral care**:
-35% (vs 38% total) brush their pets' teeth
--55% (vs 59% total) give dental treats or chewing sticks

They feel providing **oral care** is **very difficult and painful** (more than average).



A noteworthy amount of pet parents are willing to focus on prevention, rather than needing to find a cure.

The younger pet parents are more represented in this “preventive group”

Have vaccinated
their pets

93%

BZ ++ 97%
MX ++97%
FR --88%

Have visited the
vet within the
past 12 months

79%

MX ++89%
BZ +83%
USA --77%
CAN - 71%

Intend to or have
health insurance

65%

UK ++ 81%
BZ ++ 79%
MX ++71%
CAN - 53%
FR --45%



Pet parents consider that **oral care contributes greatly** to overall good health.

Consider that oral health has a direct impact on pets' health

94%

BZ ++ 98%
MX ++97%
FR --87%

Oral/dental care is one of the key concerns

33%

MX ++42%
BZ ++42%
USA --27%
FR --26%

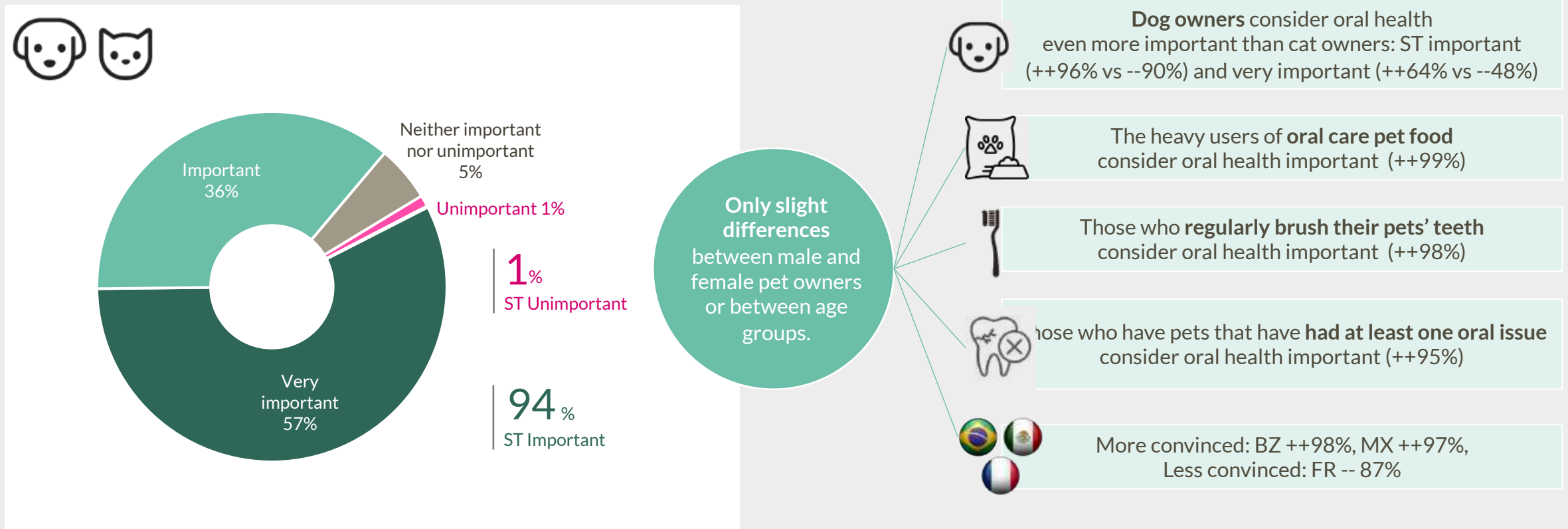
94% consider that oral health has a direct impact on their pets' health

This is whether the pet parent belongs to the “preventive group” or not. Though, dog owners display an even stronger conviction.

PET HEALTH | Impact of oral health on overall health

How important do you consider oral health in your pet's overall health?

Respondent base: TOTAL (6 countries) cat or dog owners 2,400 ST = Sub-Total



Oral hygiene is part of the routine to ensure the overall good health of pets

64% of pets have their teeth brushed regularly. Dogs are provided more regular oral care, as well as male pet owners who are more likely to answer for a dog, and the younger pet owners (more willing to carry out almost all health care).

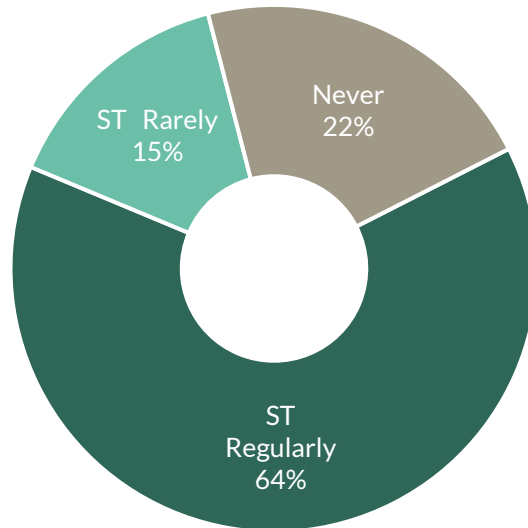
PET HEALTH | Hygiene measures

How often do you personally carry out the following hygiene measures for your pet?

Respondent base: TOTAL (6 countries) cat or dog owners 2,400



Brush teeth, oral care hygiene



Among the 64% who regularly brush their pets' teeth ...



... **dogs** have their teeth brushed more frequently than cats (++74% vs -- 48%), as well as male pet owners who more often responded for a dog (++72%)



... the **younger pet owners**, who are more numerous in the "preventive group", brush their pets' teeth more frequently (++70% vs -56% for the older pet parents)



.. the heavy users of **oral care pet food** brush their pets' teeth more frequently (++79%)



.. those who have pets that have **had at least one oral issue** brush their pets' teeth more frequently (++69%)



Brush teeth more often: BZ ++72%, MX ++70%,
Brush teeth less often: FR -- 47%

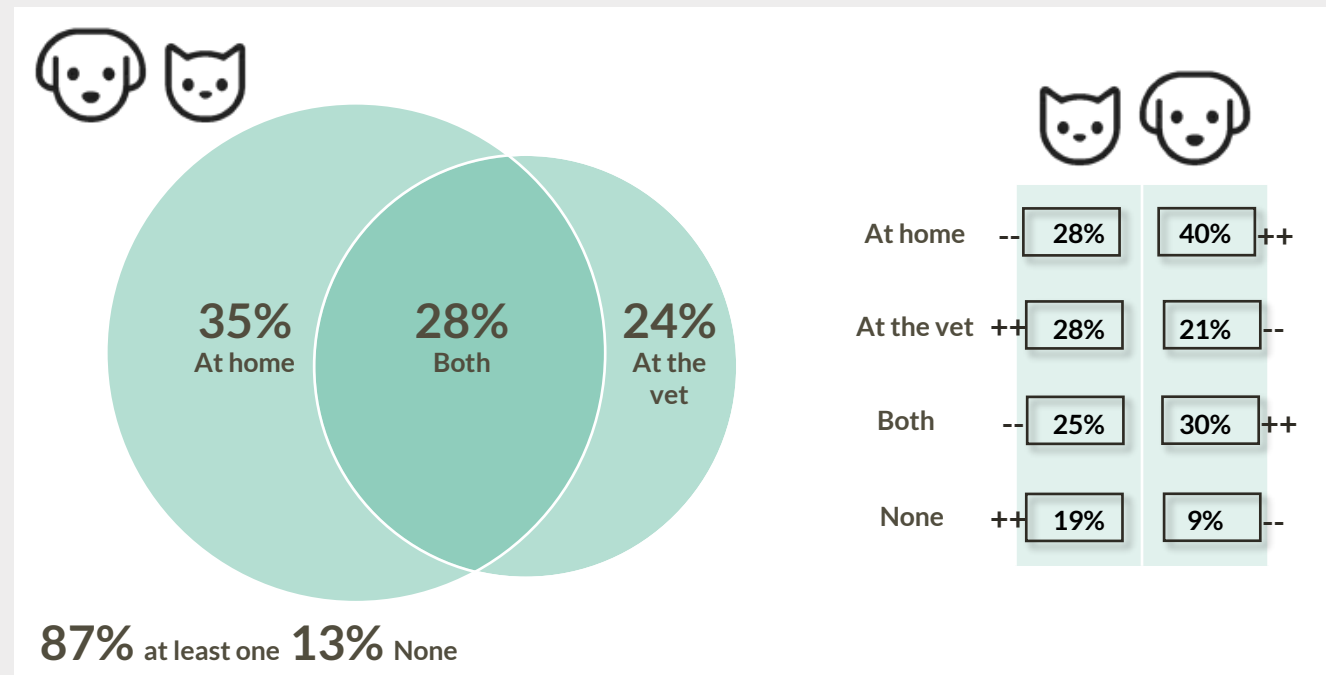
87% of pet parents provide oral care, slightly more often at home

While oral care is equally given at home and at the vet for cats, dogs visit the vet more often for it. Though teeth scaling remains infrequent and concerned only 36 % of pets last year (compared to 79% of visits).

ORAL CARE | Routines

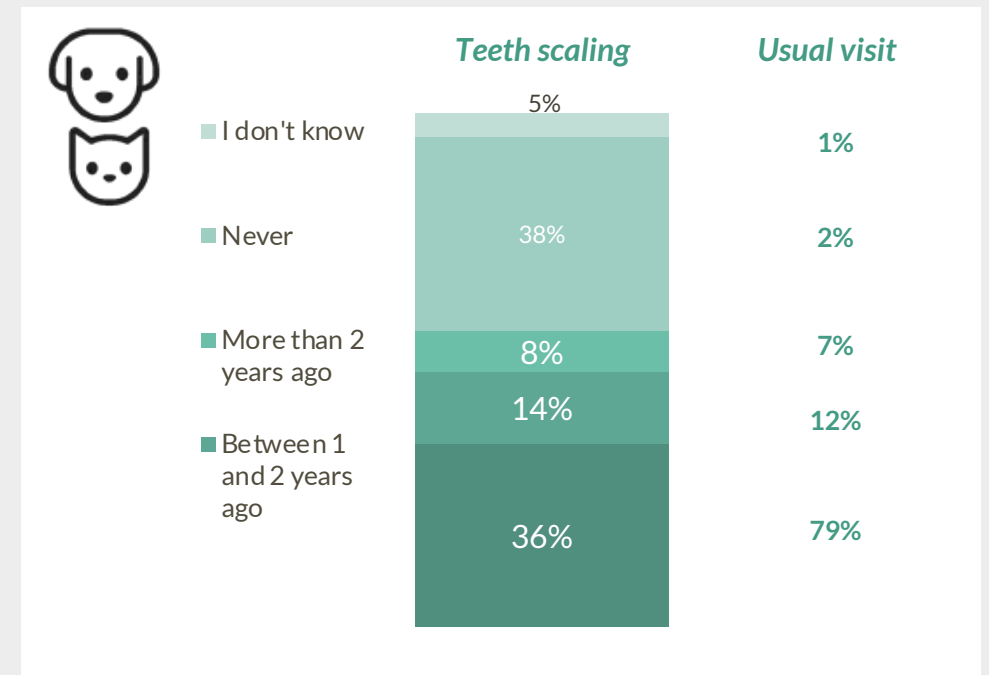
How do you manage your pet's oral health?

Respondent base: TOTAL (6 countries) cat or dog owners 2,400



When was the last time a vet saw your pet for teeth scaling?

Respondent base: TOTAL (6 countries) cat or dog owners 2,400



EU owners are more likely to bring their pets to the **vet for oral examinations** (++60% vs 52% total). On the contrary, **LATAM owners** (--45%) provide oral care at home more frequently (++71% vs 63% total vs -57% EU).

Different from routine oral examinations, **teeth scaling** remains an **infrequent procedure** for pets. **EU owners** (++42% vs 38%), **women** (++46%), the **older** (++43%), **cats** (++41%) **NEVER** perform teeth scaling.



Although pet parents are **convinced of the necessity** of oral care, it often proves to be **complicated and stressful**, particularly for **cat owners**.

Brushing my pet's teeth is too difficult

54%

FR ++65%

Taking care of my pet's oral health can be painful, both for my pet and myself

38%

FR ++52%
UK - 33%
BZ -33%

Cat owners have a harder time carrying out oral hygiene measures

However, it is painful for most pet parents. Brushing teeth is particularly difficult for cats as it has negative consequences on their mood. French owners are the most concerned.

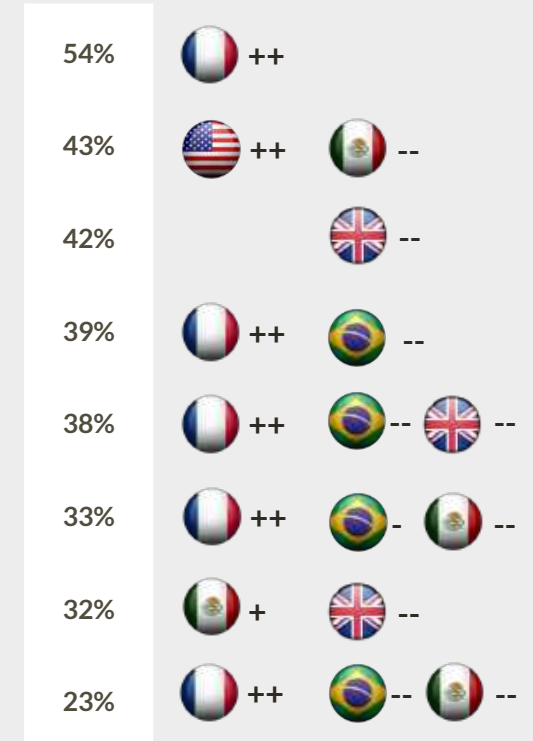
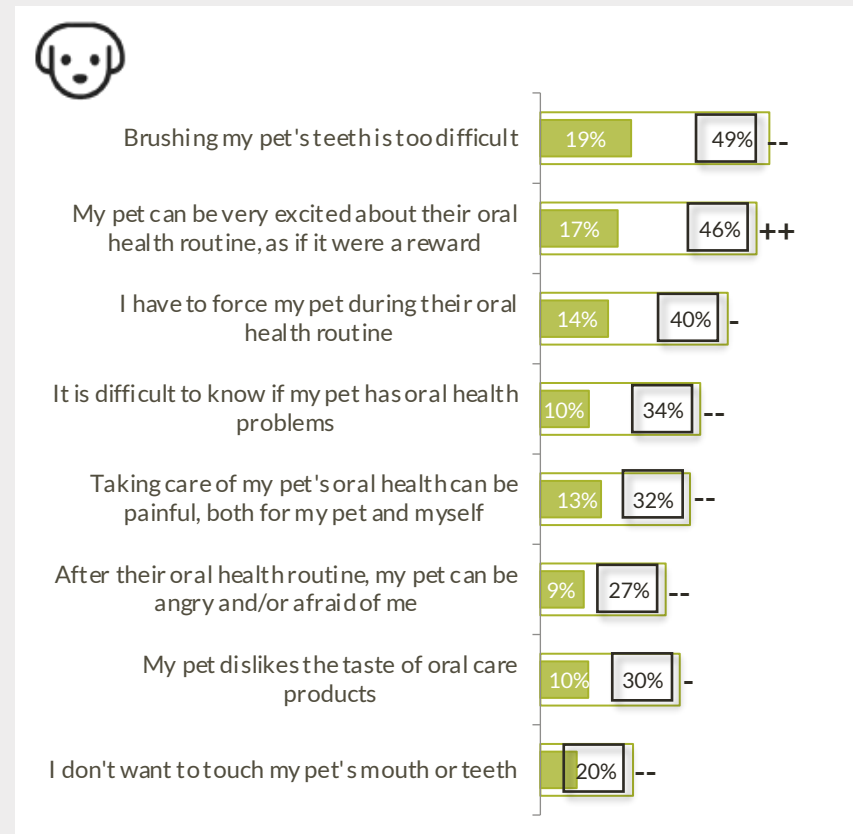
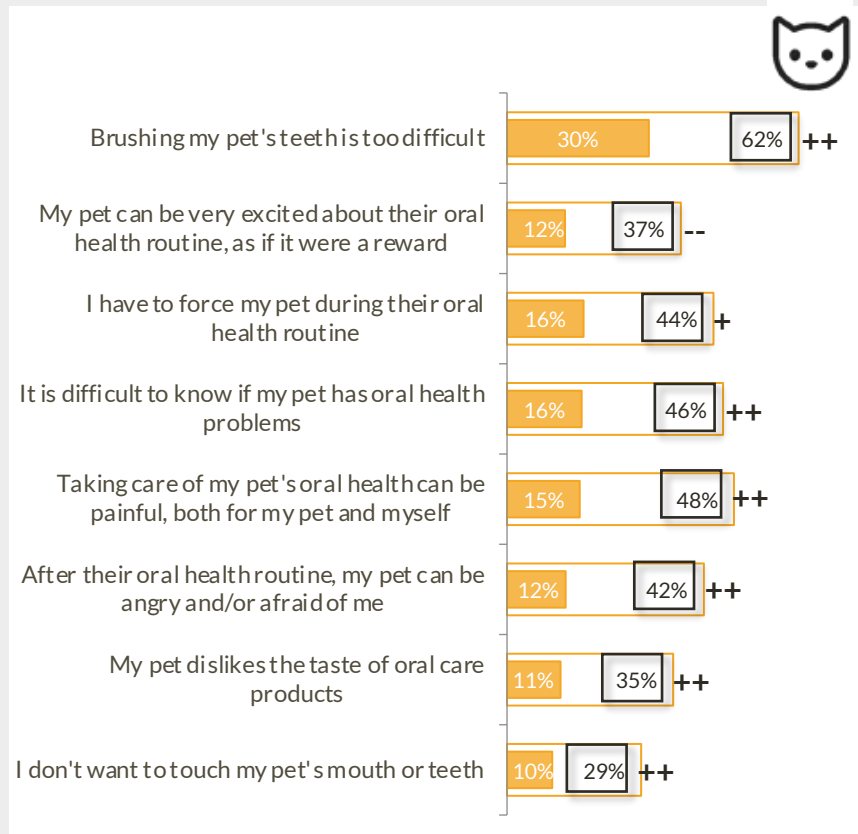
ORAL CARE | Experiences about oral care

How much do you agree with each of the following statements?

Respondent base: TOTAL (6 countries) cat or dog owners 2,400 / Cat owners 945 / Dog owners 1,455

 I strongly agree
 ST Agree (strongly + agree)

ST = Sub-Total





In these situations, pet parents are **grateful for all initiatives** that help them maintain their pets' good oral health.

Brushless products could help me maintain my pet's oral health (agree)

73%

USA ++78%
MX --60%

Give my pet a pet food that is good for oral health (important)

85%

MX ++95%
BZ ++92%
UK - 82%
USA --79%
CAN --79%

A fluffy orange and white cat is sitting on a light-colored chair. A person's hand is holding a white and orange toothbrush to the cat's mouth. The cat has its eyes partially closed and appears to be looking at the toothbrush. The background is a plain, light-colored wall.

Uses & habits



Dental treats & chewing sticks are the most purchased oral care products, particularly by dog owners.

Purchased at least one oral care product within the past year

89%

UK ++92%
FR --84%

Purchased oral care products from specialist channels

70%

BZ ++82%
MX ++77%
CAN ++77%
UK --64%
FR -- 52%

Vet is the first adviser

47%

BZ ++58%
MX ++56%
FR -41%
CAN -- 40%
UK --39%

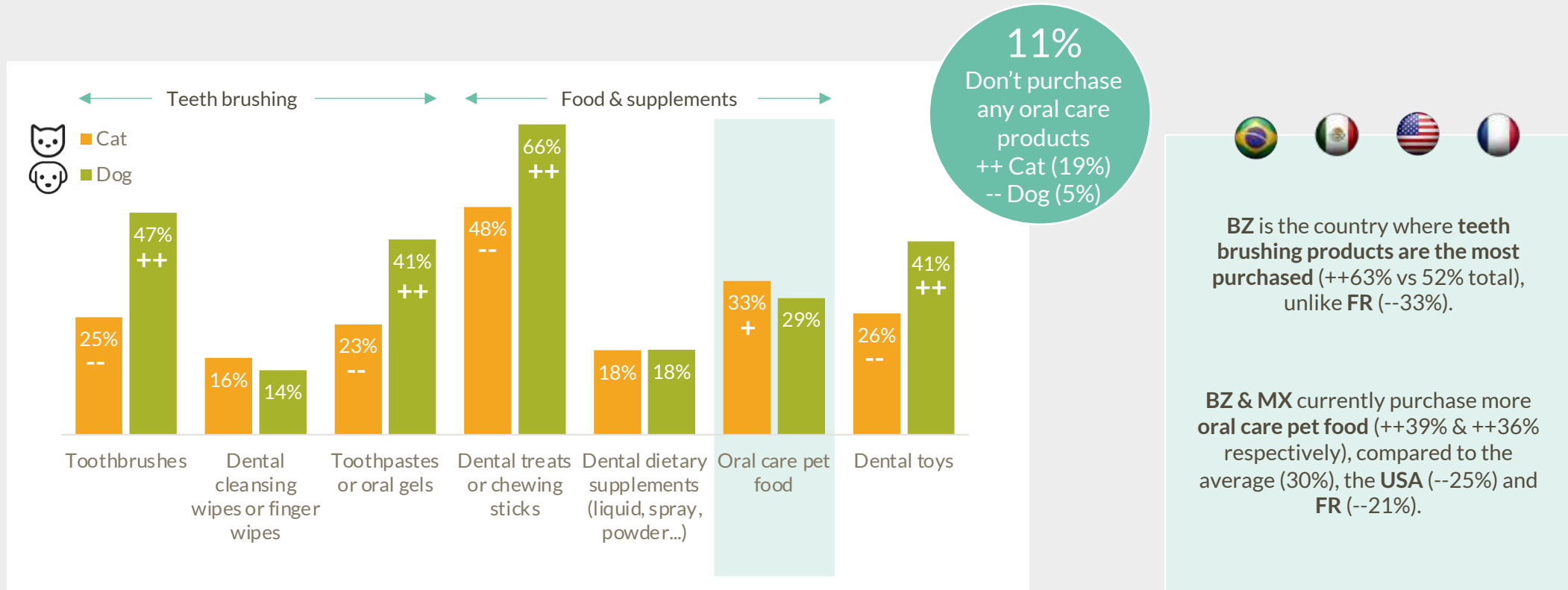
89% of pet parents have purchased at least one oral care product within the past year

Dental treats are the most purchased product, particularly by dog owners. Overall, cats are less likely to be provided with oral care products, except for pet food, interestingly.

PURCHASE HABITS | Other oral care product purchases

What kinds of oral care products have you used within the last 12 months?

Respondent base: TOTAL (6 countries) cat or dog owners 2,400 / Cat owners 945 / Dog owners 1,455



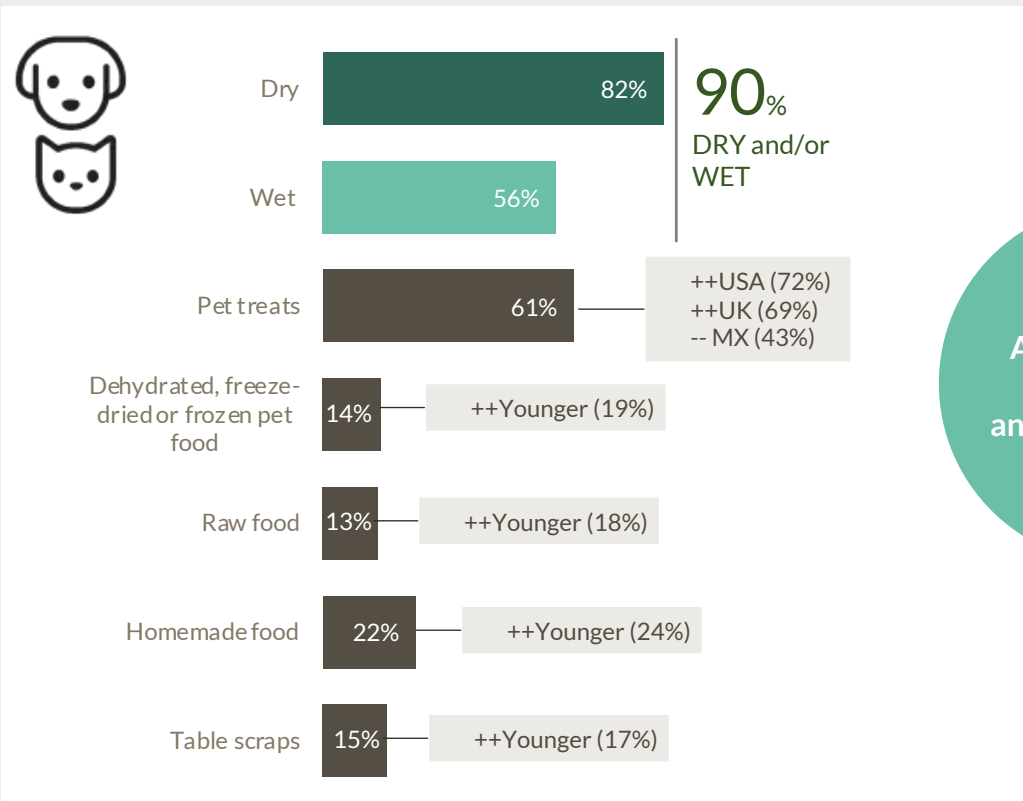
Most pets are fed either dry or wet food, frequently both

Cat owners are heavier users of both dry and wet pet food as they favor a mixed diet. Dogs and younger pet owners are more likely to feed their pet non-manufactured or new forms of pet food.

PURCHASE HABITS | Breakdown per food type

What kinds of foods do you usually give to your pet(s)?

Respondent base: TOTAL (6 countries) cat or dog owners 2,400



Among the 90% who give dry and/or wet food to their pets ...

- ... cats are fed **dry food** (++)85% vs -- 80%) and **wet food** (++)73% vs -45%) more than dogs. **Non-manufactured food** is given to **dogs** more (however, they are mainly fed dry food).
- ... the **younger pet owners** feed their pet dry and/or wet food less (--88% vs ++93% older pet parents), but more **non-manufactured food** or **new forms of pet food**
- ... the heavy users of **oral care pet food** feed their pets **ret food** (++)60% vs 56% total) and **non-manufactured or new forms of pet food** more (however, strong users of dry food).
- ... those who **regularly brush their pets' teeth** feed their pet dry and/or wet food less (--88% vs 90% total) but more **non-manufactured food** or **new forms of pet food**
- Those who feed their pet **dry food**:
 MX ++90%, FR ++87%, UK --78%.
 Those who feed their pet **wet food**:
 UK ++70%, CAN -- 48%, MX --46%,

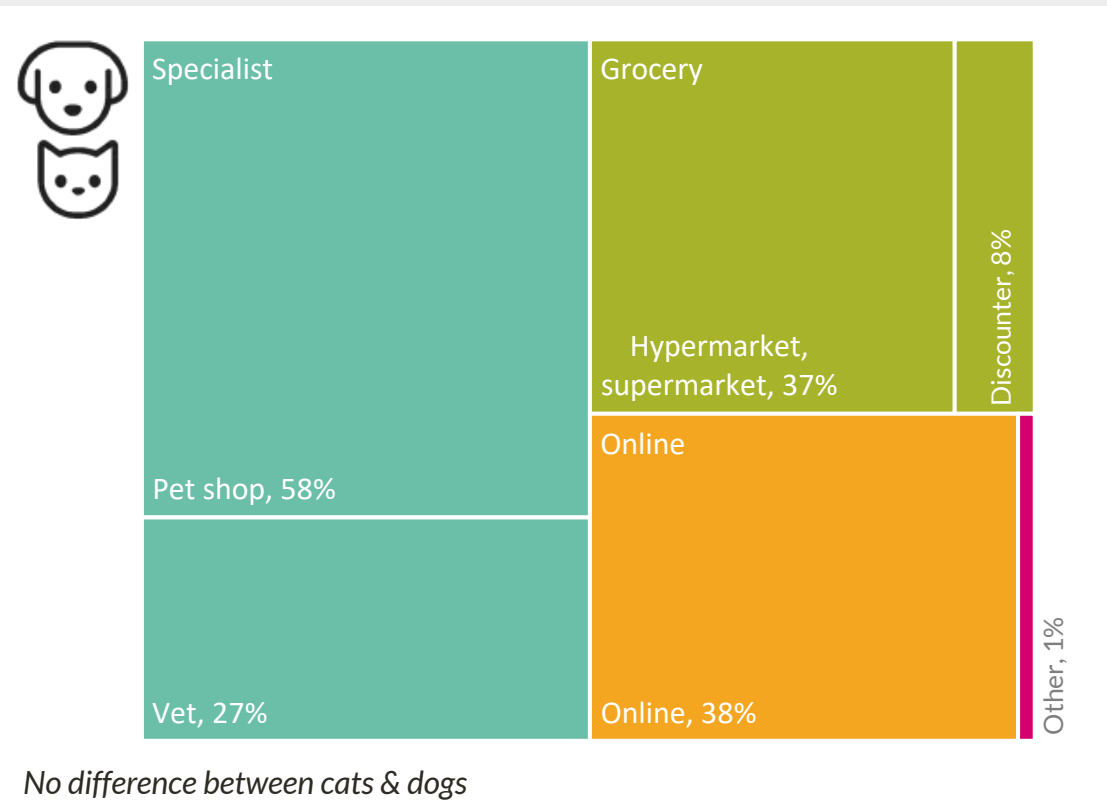
Not entirely used to it, pet parents are eager to find advice about oral care products

And the specialist channel looks to be a good place for finding such advice. The vet is also a major recommendation source, even if the oral care products are purchased elsewhere.

PURCHASE HABITS | Purchase channels & Influencers

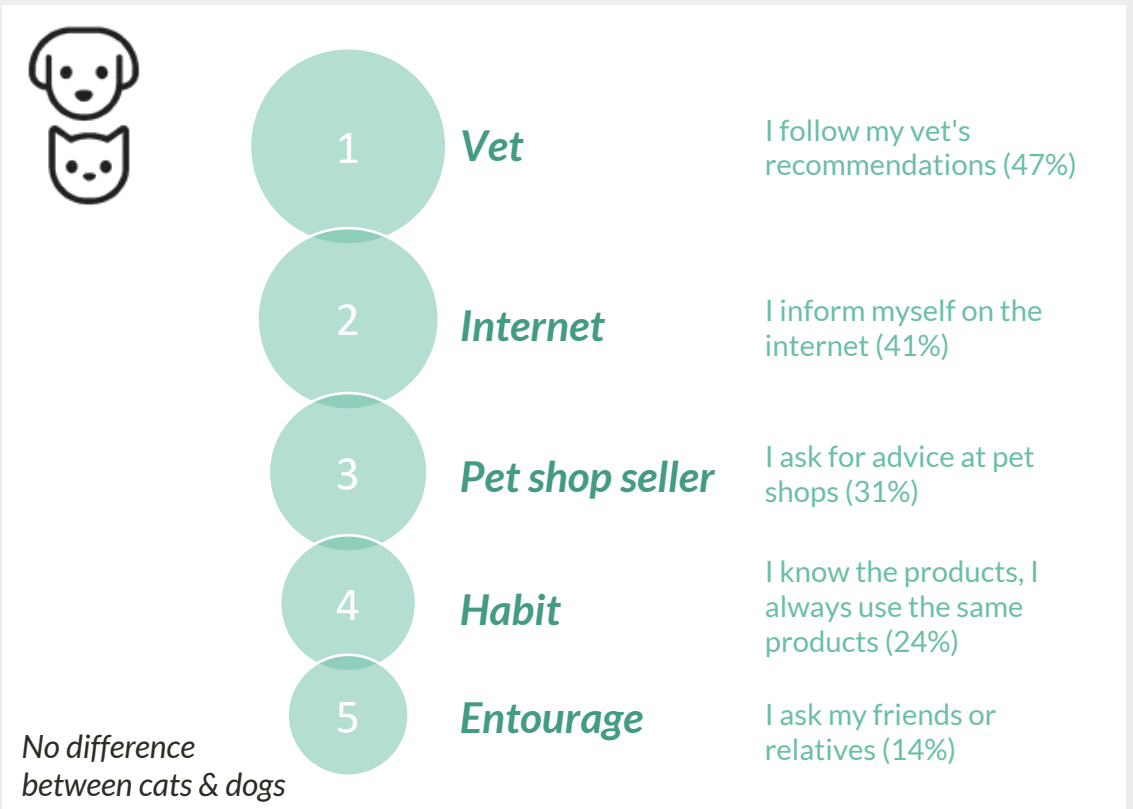
Where do you usually purchase your pet's oral care products (all products considered, excluding toys)?

Respondent base: TOTAL (6 countries) cat or dog owners 2,400



How do you choose which oral care products to give to your pet (all products considered, excluding toys)?

Respondent base: TOTAL (6 countries) cat or dog owners who purchase oral care products 2,144

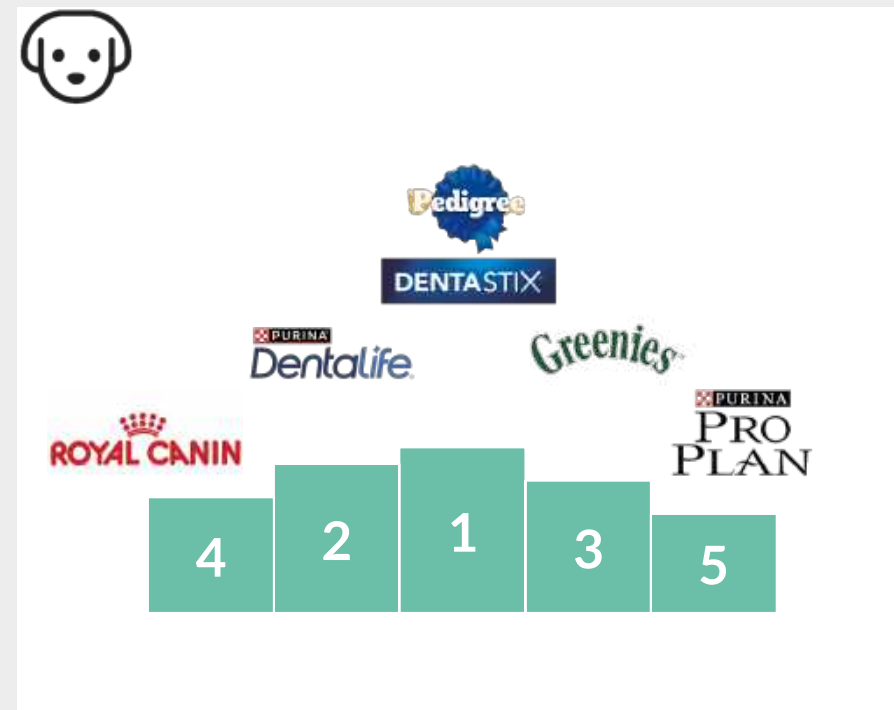


The surveyed regions have similar brands in the top 5, except for the leader in each market. Dentalife, Greenies, Royal Canin and Pro Plan share strong positions among both cat and dog oral care products, while Whiskas Dental and Pedigree Dentastix dominate their respective market.

PURCHASE HABITS | Oral care product brands

Which brand(s) of oral care products (all products considered, excluding toys), have you bought for your pet within the last 12 months?

Respondent base: TOTAL (6 countries) cat or dog owners 2,400 / Cat owners 945 / Dog owners 1,455



Perspective





Pet food that promises to maintain good oral health is very appealing to both cat and dog parents.

Willingness to change for a diet that contains functional ingredients that maintain oral health

BZ ++88%
MX ++81%
USA --70%
FR --69%
CAN -- 67%

74%

Have NEVER given their pet an oral care pet food (including treats)

USA ++ 26%
CAN ++22%
UK -- 14%
BZ -- 11%
MX --11%

17%

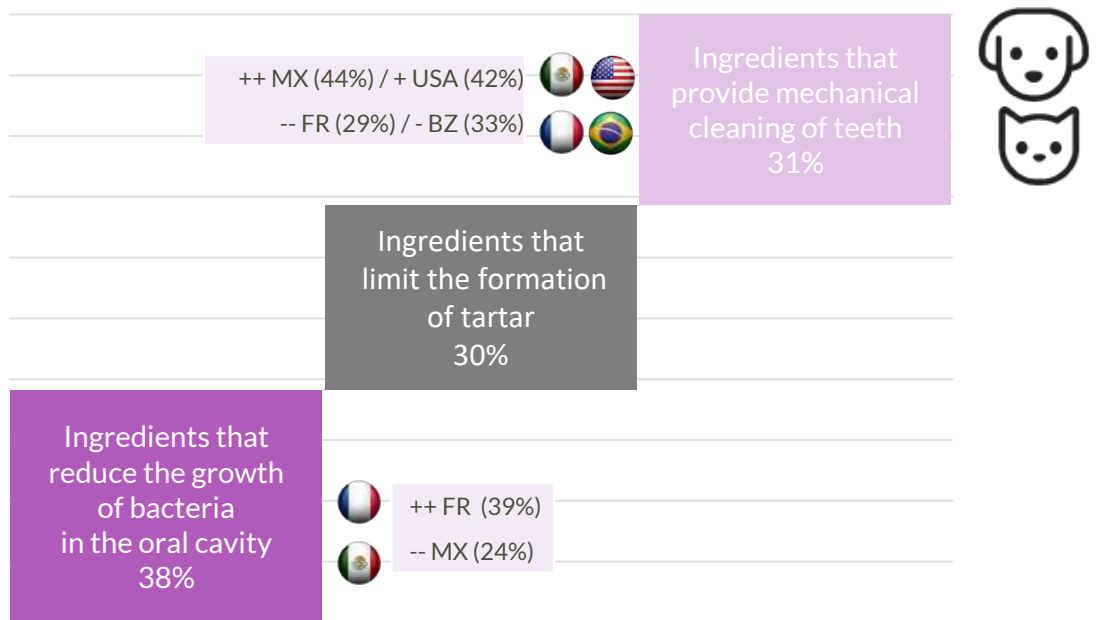
Lack of awareness is the first reason mentioned for not currently using oral care pet food

This is particularly striking in MX with 64%. Consistent with previous results, dog owners are more willing to provide oral care pet food than others, while cat owners are less convinced about the necessity of it.

PURCHASE HABITS | Considerations for oral care pet food

Among the three modes of action commonly implemented in oral care products for pets, which one is the most important for you?

Respondent base: : TOTAL (6 countries) cat or dog owners 2,400

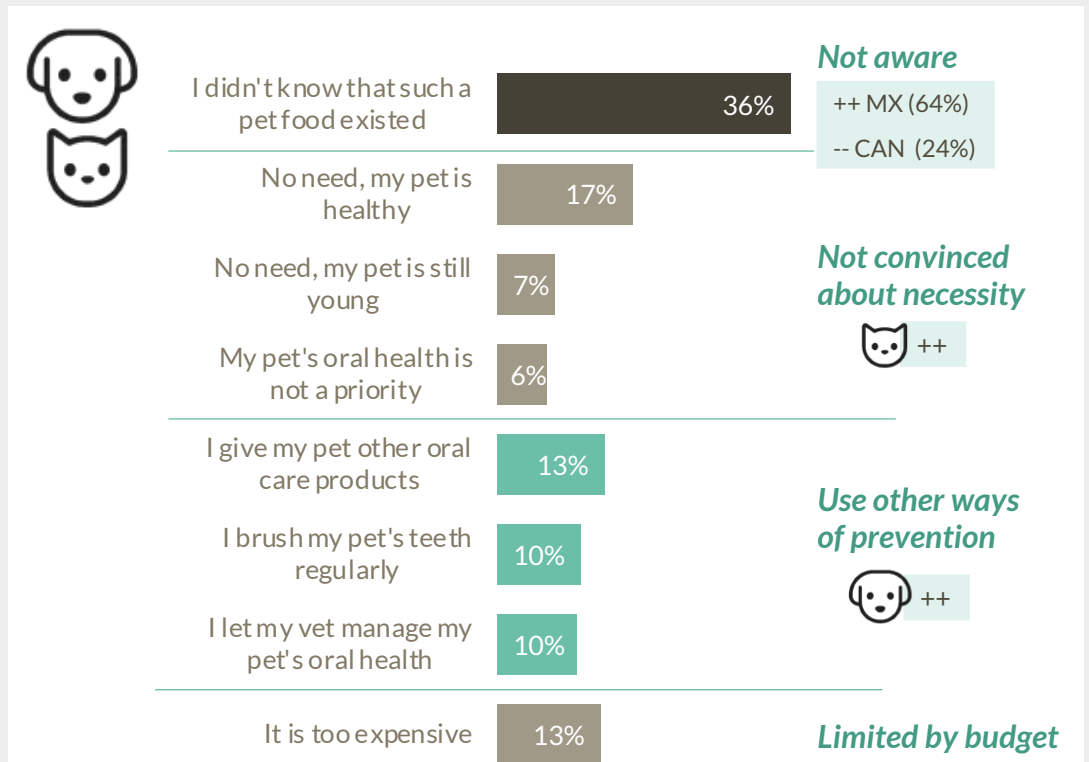


No significant differences across the subpopulations, except for “reducing the growth of bacteria”: ++ women (40%), ++ those who regularly brush their pets’ teeth (40%), ++ heavy users of oral care pet food (40%).

Why don't you give your pet oral care food?

Respondent base: : TOTAL (6 countries) cat or dog owners who don't give pet oral care food 412

Reasons for not giving oral care pet food





Key learnings

At a glance



To develop the oral care pet food market, it is necessary to:

- **Accompany and convince** pet parents about the necessity to provide their pets with oral care.
- **Provide information** regarding the existence of pet foods with other actions than the simple “mechanical cleaning action”.

On paper, pet parents are convinced of the importance of good oral hygiene and its direct impact on overall health. The truth is more complicated.

Those who are the most aware are already involved in oral hygiene measures such as brushing their pets' teeth or providing dental sticks. There are more younger pet parents this way.

Lack of information and/or the complexity of implementing this oral care are the main obstacles to its wider use. Particularly true for cat owners.

Brushless solutions or oral care pet food with active ingredients to fight tartar building or bacteria growth, are very attractive offerings. For the time being, propositions with mechanical cleaning remain the most widespread.

Thank you

Matthieu Glayrouse
Business Manager
matthieu.glayrouse@symrise.com
+33(0)642652814

 **Loop**

22 rue Vital Carles
33000 BORDEAUX, FRANCE

