

GALLUP®

PETSMART
Charities



State of **PET CARE STUDY**

PET PARENTS' ASSESSMENT OF
AMERICAN VETERINARY CARE



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FOREWORD

If you have a pet, you **know** they're family. Sometimes, we rescue them, but most of our pets save us with love and devotion. A family with a pet is more common than a family with a human child — the majority of Americans (62%) have at least one pet.

Today, 97% of pet parents consider their pets as family — including the 51% who say they count as much as human members. And the companionship of pets helps people experience profound health benefits. According to the Human Animal Bond Research Institute (HABRI), it is estimated that pet ownership saves the U.S. healthcare system nearly \$23 billion a year because of the mental and physical health benefits of pet companionship. Wow! The power of pets.

Tragically, though, too many of our pets don't get the health care *they* need to thrive. PetSmart Charities® estimates that 50 million pets in the U.S. lack access to adequate veterinary care — meaning that which is sufficient enough to meet the basic standards of care. They deserve better; the consequences of going without can be dire to pets, their people and communities. It impacts the health, happiness and overall wellbeing of both pets and people.

It's why as the leading funder in the animal welfare space, PetSmart Charities, made a \$100 million commitment to invest in helping more pets get the veterinary care they need. To assess the scope of the crisis, the commitment includes commissioning Gallup to conduct research. We needed to learn how pet parents themselves are experiencing veterinary care and related barriers. The results are insightful, as you'll read, and shine a light on the challenges and difficult decisions pet parents are making about their pet's health every day.

The hope is the findings in ***PetSmart Charities-Gallup State of Pet Care Study: Pet Parents' Assessment of American Veterinary Care*** will influence the evolution of veterinary care to include more affordable, flexible and accessible models. Since no single organization can resolve this crisis alone, we are sharing data in hopes of building common purpose and partnership across the veterinary industry. We plan to repeat this survey every other year to mark our impact and progress. Additionally, to gain insights into challenges facing the veterinary industry, we'll survey veterinary practitioners and gather data to tackle both sides of the issue. Both perspectives are crucial, and solutions must work for pet parents and veterinary healthcare teams to make lasting change.

Pets have the power to unite us, despite our many differences. No matter where you live or what you do, connecting over our pets builds bridges. We invite pet parents, veterinary practitioners, nonprofits, the veterinary and pharmaceutical industries, educators, and local communities to join the effort.

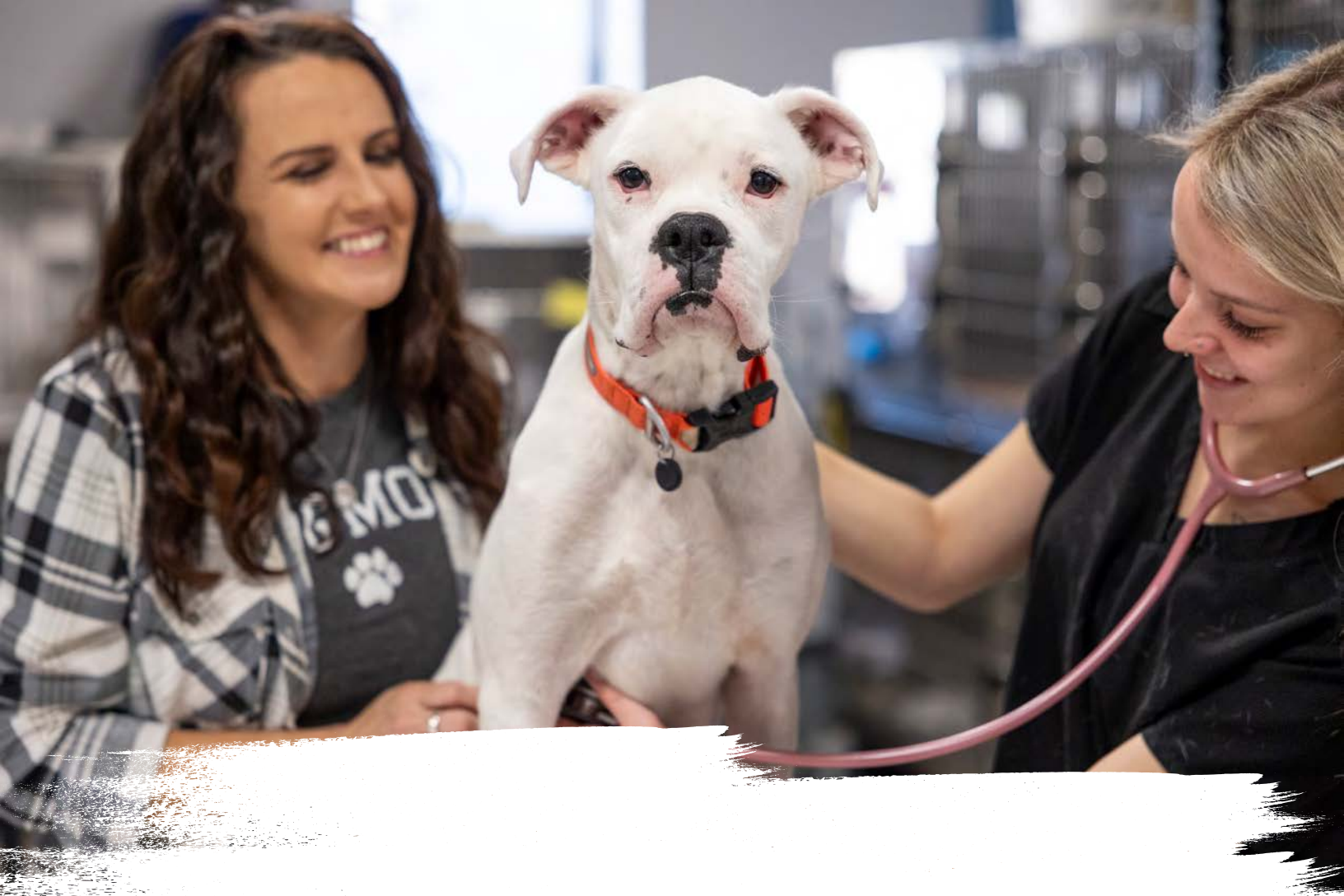
Together, we can make life healthier for pets and people — the foundation of more vital, happy communities.



With gratitude,

Aimee Gilbreath, MBA

PRESIDENT, PETSMART CHARITIES



EXECUTIVE SUMMARY

To better understand the veterinary habits of pets and their owners, as well as the barriers they face to receiving necessary care, PetSmart Charities partnered with Gallup on the State of Pet Care study, a nationally representative survey of thousands of pet owners across the United States. The survey, conducted Nov. 13, 2024-Jan. 9, 2025, interviewed nearly 2,500 U.S. cat and dog owners on topics related to their experiences with veterinary care — including how often they visit the veterinarian, where they seek information about their pets' health, whether they have ever declined care for their pets, and the extent to which veterinarians offer services that meet both their own and their pets' unique needs. In addition to web-based surveys, Gallup used mail as a supplemental collection tool to ensure adequate representation from key segments of pet parents, including those without internet access.

The study finds that while pet parents broadly acknowledge the need to provide veterinary care for their pets, most say they have either opted not to take their pet to the veterinarian or have declined recommended care during visits, often due to financial considerations. Most pet parents who have encountered these and other barriers say their veterinarian did not offer alternative treatment options that better met their budgetary needs or the needs of their pet. Pet parents also pointed toward potential solutions that would expand access or the ability to accept veterinary care, such as payment plans and non-traditional care formats, including telemedicine and community clinics.

KEY FINDINGS FROM THE FIRST PETSMART CHARITIES-GALLUP STATE OF PET CARE SURVEY INCLUDE:

VETERINARY CARE IS OUT OF REACH FOR MANY.

Just over half of pet parents (52%) have not brought their pets to the veterinarian within the past year, even when they felt the pet needed care, or have declined care that was recommended by a veterinarian. This percentage is especially high among 18- to 29-year-old (59%), Black (58%), and Hispanic (57%) pet parents, as well as those living in households earning less than \$60,000 per year (55%).

FINANCIAL BARRIERS TO CARE IMPACT HOUSEHOLDS ACROSS THE INCOME SPECTRUM.

Among pet parents who did not take their pets to the veterinarian in the past year when in need of care, or who have ever declined care that a veterinarian has recommended, more than seven in 10 (71%) say it is because they could not afford it or that it was not worth the cost. The affordability of veterinary care remains a challenge even for pet parents in the highest-earning households: 33% of those earning \$90,000 or more who have declined or forgone care say they did so because they could not afford it.

CONSEQUENCES OF SKIPPING CARE ARE SEVERE.

Only one-third of pet parents who declined veterinary care say their pet's condition improved after skipping care. Concerningly, 14% say their pet's condition worsened, or their pet died. Moreover, nearly one in three pet parents (30%) say they know a friend or family member whose pet passed away because they could not afford the necessary treatment.

FEW PET OWNERS SAY THEIR VETERINARIANS OFFER OPTIONS THAT BETTER FIT THEIR BUDGET OR NEEDS.

73% of pet parents who declined care due to affordability say they were not offered a more financially attainable option, and 46% of pet parents who declined care that was not practical for them or their pet say they were not offered an option that better fit their needs.

ACCESSIBLE PAYMENT PLANS COULD SIGNIFICANTLY INCREASE ACCESS TO CARE.

Nearly two-thirds of pet parents (64%) say that payment plans would enable them to at least double the amount they could afford to pay for life-saving care for their pet; however, fewer than one in four parents (23%) have ever been offered such a plan.

MANY PET OWNERS ARE INTERESTED IN NON-TRADITIONAL CARE OPTIONS.

About four in 10 pet parents express interest in utilizing non-traditional care delivery models, such as community clinics (38%), home visits from a veterinarian (38%) or telemedicine (37%). Interest in community clinics is highest among Black pet parents (54%), 18- to 29-year-olds (48%), and households earning less than \$60,000 per year (47%) — all of which are groups that find it particularly difficult to access care.





DETAILED FINDINGS

VETERINARY CARE IS OUT OF REACH FOR MANY.

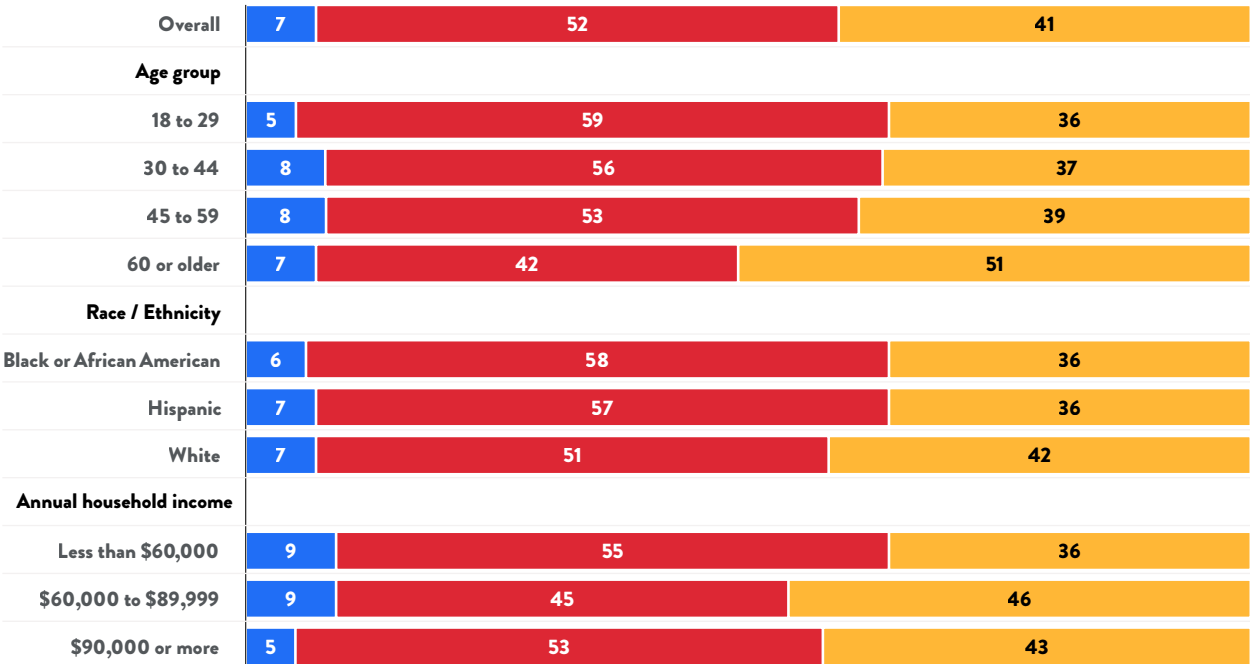
More than half (52%) of U.S. pet parents have declined recommended veterinary care — or forgone visiting the veterinarian entirely in the last year — even if they felt their pet needed care. Specifically, 37% visited the veterinarian but declined recommended care, while 15% did not take their pet to the veterinarian at all despite recognizing a need for care.

Fewer than half of pet parents who bring their pets in for exams every year (41%) consistently follow through on the care recommended by their veterinarian during those visits.

CHART 1

PET PARENTS WHO HAVE BROUGHT THEIR PETS TO THE VETERINARIAN IN THE PAST YEAR, OR DECLINED RECOMMENDED CARE IN THE PAST

- % Has not visited veterinarian in the past year because pet did not need care; has never declined recommended care
- % Has not visited veterinarian in the past year due to barriers, or has ever declined recommended care
- % Has visited veterinarian in the past year; has never declined recommended care



When was the last time any of your pets saw a veterinarian?

Have you ever declined any of the following types of care recommended for your pet by a veterinarian?

Please select all that apply.

While more than **four in 10** pet parents of all ages, races and income levels say **they have declined or forgone recommended care in the past**, these barriers are particularly pervasive for certain groups. Pet parents who are 18 to 29 years old (59%), Black (58%) or Hispanic (57%), and those living in households that earn less than \$60,000 per year (55%) are especially likely to say they have declined care or avoided bringing their pets to the veterinarian for needed care.

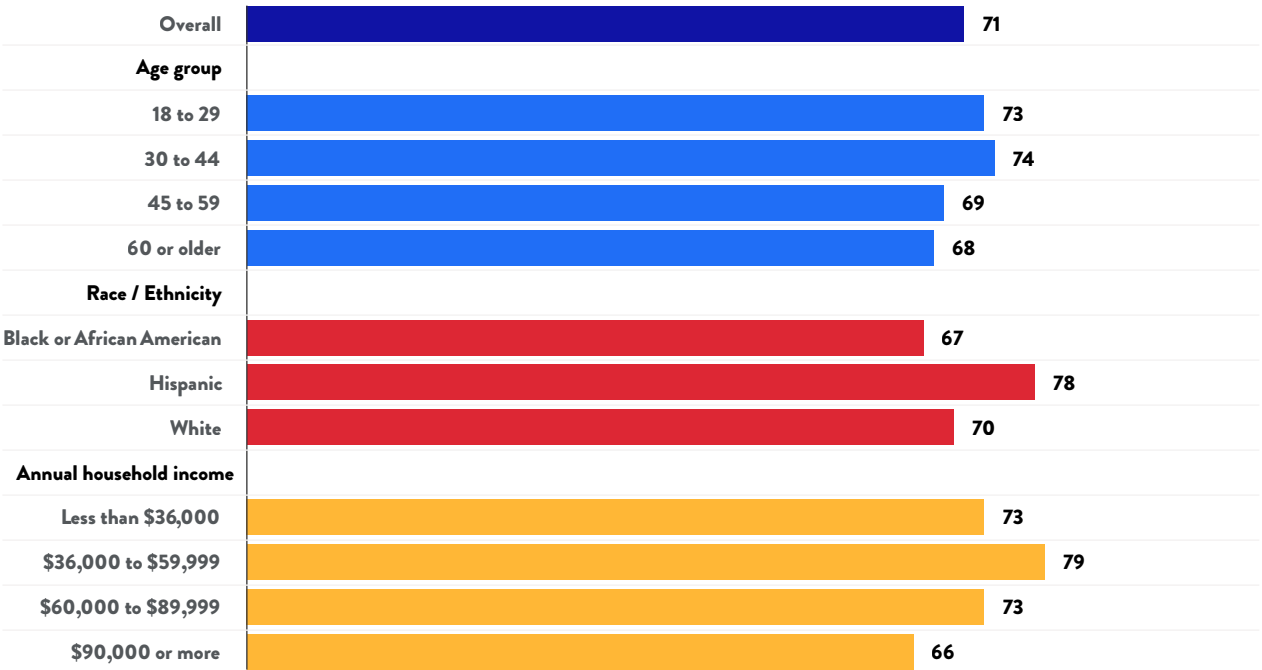
4 in 10
pet parents
of all ages, races and income levels say they have declined or forgone recommended care in the past.

FINANCIAL CONSIDERATIONS ARE THE GREATEST BARRIERS TO CARE.

While pet parents cite several reasons they have not visited or accepted recommendations from their veterinarian, financial considerations loom larger than any other barrier. Among pet parents who say they have declined care or forgone annual veterinary visits, more than seven in 10 (71%) say they did so either because it was not affordable, they did not believe the services were worth the cost or a combination of both. As with access to care more broadly, finances have impeded the ability of at least two-thirds of pet parents across age, race and income groups to provide their pets with needed veterinary care.

CHART 2
PET OWNERS WHO HAVE DECLINED OR NOT SOUGHT CARE BECAUSE THEY COULD NOT AFFORD IT OR SAID IT WAS NOT WORTH THE COST*

% Pet owners who have declined or not sought care because they could not afford it, or because they did not believe the care was worth the cost



Which of the following prevented you from getting veterinary care for your pet(s) in the last 12 months?
Which of the following best describes the reason(s) you declined care?

Select all that apply.

* Among pet owners who have ever brought their pet to the veterinarian or declined recommended care



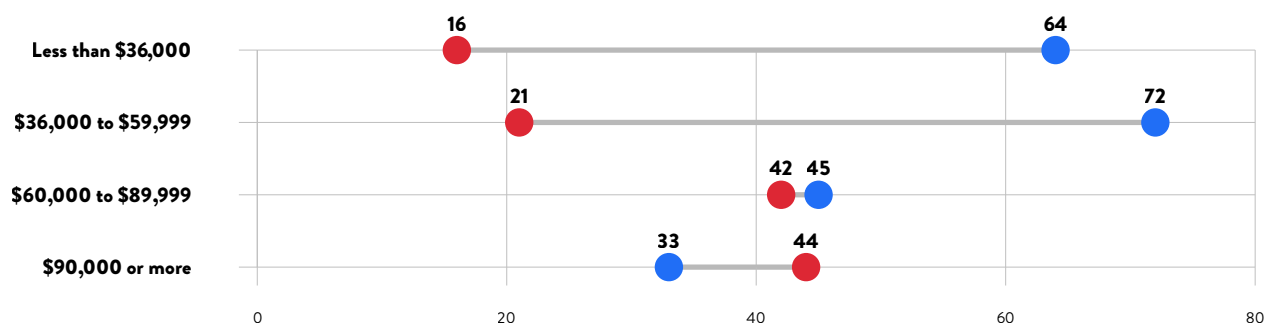
Though financial considerations are common across pet parents, which of these considerations stands in the way of care varies based on household income. Pet parents in households earning less than \$60,000 per year primarily cite affordability as the reason they have avoided care; conversely, those in households earning at least \$60,000 are more likely than their peers to be able to cover the cost of treatment, but are about twice as likely to decline recommended care because they did not feel the cost was justified. Still, the affordability of veterinary care remains a challenge even for pet parents in the highest-earning households: 33% of those earning \$90,000 or more who have declined or forgone care say they did so because they could not afford it.

CHART 3

COMPARISON OF PET PARENTS WHO DECLINED CARE DUE TO AFFORDABILITY OR PERCEPTION THAT CARE WAS NOT WORTH THE COST, BASED ON HOUSEHOLD INCOME*

% Selected, based on annual household income

■ Care was not worth the cost ■ Could not afford the cost



Which of the following prevented you from getting veterinary care for your pet(s) in the last 12 months?

Which of the following best describes the reason(s) you declined care?

Select all that apply.

* Among pet owners who have ever brought their pet to the veterinarian and declined recommended care

In addition to pervasive financial considerations an additional set of barriers to pet care is whether the treatments veterinarians recommend fit the unique needs and circumstances of pets and their owners. Nearly three in 10 pet parents (29%) who have declined care say it was not practical for them or their pet; for example, the care may cause their pet too much stress, or the owner may not be comfortable administering the recommended treatment to their pet. An additional concern about the suitability of care is whether that care would be too painful for an owner's pet, which has caused 11% of those who declined care to forgo treatment.

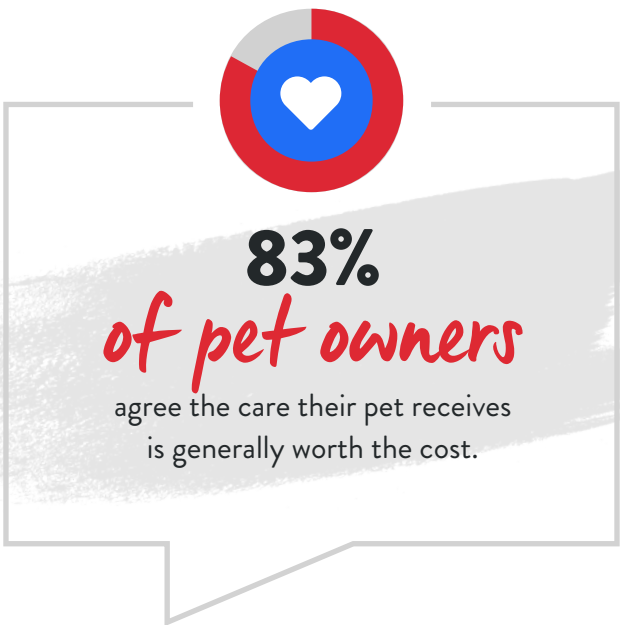
CHART 4
REASONS PET PARENTS DECLINE RECOMMENDED CARE FOR THEIR PETS*



Which of the following best describes the reason(s) you declined care?
Select all that apply.

* Among pet owners who have ever brought their pet to the veterinarian and declined recommended care

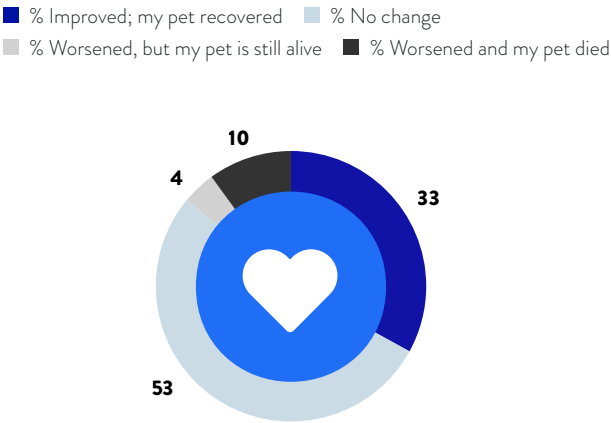
One positive finding related to pet parents who decline care is that in nearly all cases, parents are not declining care because they question the judgment or motives of their veterinarian: Just 7% of pet parents say their primary reason for declining care is because they did not trust the veterinarian. Additionally, while perception that care was not worth the cost has caused some to decline recommendations from their veterinarian, pet parents broadly feel the care they receive is valuable — with 83% of pet parents who have ever visited a veterinarian agreeing the care their pet receives is generally worth the cost.



CONSEQUENCES OF SKIPPING CARE CAN BE SEVERE.

The consequences of declining recommended veterinary care can lead to tragic outcomes for pets and their owners. While the most declined veterinary services are diagnostic procedures, such as blood tests (22%) and preventive care such as annual check-ups and vaccinations (18%), 16% of pet parents say they have declined elective surgeries, 11% have forgone recommended medications and 7% have declined life-saving surgeries. Among pet parents who have declined care for any reason, most (53%) say their pet’s condition did not change in the three months following their most recent refusal of services; however, 4% say their pet’s condition has worsened and 10% say their pet died after declining care.

CHART 5
SUMMARY OF PET HEALTH DEVELOPMENTS
AFTER OWNER DECLINED RECOMMENDED
CARE*



What happened to your pet’s condition in the 3 months after you declined care?

* Among pet owners who have ever brought their pet to the veterinarian and declined recommended care

Even if a pet parent has not personally experienced the death of a pet after declining care, many know someone who has. **Three in 10 pet parents say they have a friend or family member whose pet died because the owner could not afford needed veterinary care**, and 11% of pet parents know someone who had to give up a pet because they could not afford care.

Beyond the devastating impact these outcomes have on families, pets passing away or being euthanized from potentially treatable conditions due to financial considerations or other barriers to care may also have negative implications for the veterinary profession. A 2014 survey found more than half of veterinarians were regularly unable to provide recommended care due to pet parents’ financial constraints.¹

Pet parents declining care has negative implications not only for pets, but also for veterinarians. A separate national survey of veterinarians found roughly one in three veterinarians reported depressive episodes after graduating from veterinary school, and one in 11 veterinarians was currently experiencing “serious psychological distress.”²

While veterinarians are among the professionals that the American public believes are most ethical, the percentage of adults who rate the honesty and ethical standards of veterinarians as “high” or “very high” declined from 71% in 2006 to 65% in 2023, though both nurses and medical doctors have seen similar declines in perceptions of their own ethical standards over that same period.

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THREE IN 10

PET OWNERS

say they have a friend or family member whose pet died because the owner **could not afford veterinary care.**

1 <https://avmajournals.avma.org/view/journals/javma/250/7/javma.250.7.785.xml>

2 <https://avmajournals.avma.org/view/journals/javma/247/8/javma.247.8.945.xml>

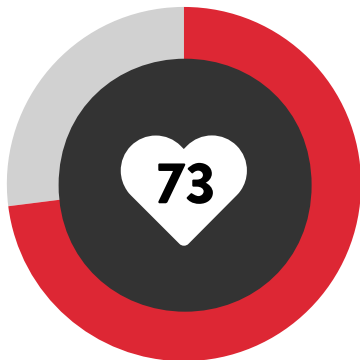
FEW PET PARENTS SAY THEIR VETERINARIANS OFFER OPTIONS THAT BETTER FIT THEIR BUDGET OR NEEDS.

On its own, sizable segments of the pet-owning population being unable to access care due to financial considerations or impracticality is a problem for the veterinary care community. In the worst-case scenario, it can lead to deteriorating health or even the death of pets. Unfortunately, this is the case for some pet parents who find themselves unable to afford or administer recommended treatment. However, part of this may be due to veterinary healthcare teams having a well-intentioned desire to provide the most advanced medical treatments to pets under their care — a practice that is reinforced by most of the training and education they receive. Accordingly, while the most advanced care is an option that should be explored for pet parents, it should not be presented as the only option — or perhaps not even the first option — given the number of pet parents who have financial considerations and the robust research on first-recommendation bias.

About three-quarters of pet parents (73%) who have declined recommended care due to financial considerations say their veterinarian did not offer them a lower-cost option after they declined recommended care, and just under half who declined care that was not practical for them or their pet (46%) say they were not offered another care option that better fit their needs.

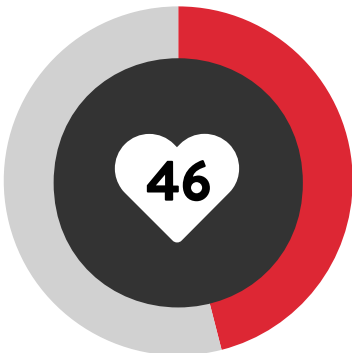
CHART 6
PET PARENTS WHO REPORT THEY WERE OFFERED ALTERNATIVE OPTIONS AFTER DECLINING CARE FOR COST OR PRACTICALITY

% No



**You indicated you declined care because of the cost.
Did your veterinarian offer a lower cost alternative?***

* Among pet owners who declined care because of cost



**You indicated you declined care because it was not practical
for you or your pet. Did your veterinarian offer another option
that better fit you or your pet's needs?†**

† Among pet owners who declined care because it was not practical for the owner or their pet

It is worth noting that these results likely do not account for every element involved in the interplay between veterinarians' clinical recommendations and the diverse circumstances of their clients. Did the pet owner explicitly explain to their veterinarian that the option was not in their price range or appropriate for their needs? Did the veterinarian offer an alternative that was not clearly understood by the owner? Did an alternative care option exist for the pet's condition?

While these factors will all vary from patient to patient, that so few pet parents perceive they were given an alternative avenue to care underscores the need for veterinarians to be aware of and ready to offer an array of care options — even if several of those options would not be their preferred treatment plan.



A method of expanding care options for patients may not involve the veterinarian administering care at all, but rather, redirecting the patient to another provider who may offer a more appropriate solution. However, few patients have received such guidance: Among owners who have not brought their pet to the veterinarian in the last year, or who have ever declined recommended care, more than three-quarters (76%) say they have never been referred to another lower-cost veterinary practice or provider.

One potential impact of this lack of options — either in the care veterinarians recommend, or in the actual provider administering that care — is pet parents seeking guidance about their pets' health from non-veterinary sources. When their pets are sick or injured, most pet parents (81%) do seek guidance from a veterinarian, either in-person or remotely. Still, veterinarians are not the sole source of information for many owners: 44% say they consult online resources for information about their pet's health, 22% ask their friends or family and 11% consult a non-veterinary pet professional, such as a groomer or trainer.

CHART 7

SOURCES OF PET-RELATED HEALTH INFORMATION

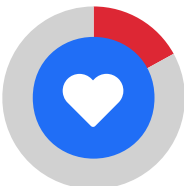
% Selected



Where do you typically go for information about your pet's health if you think they are sick or injured?

Select all that apply.

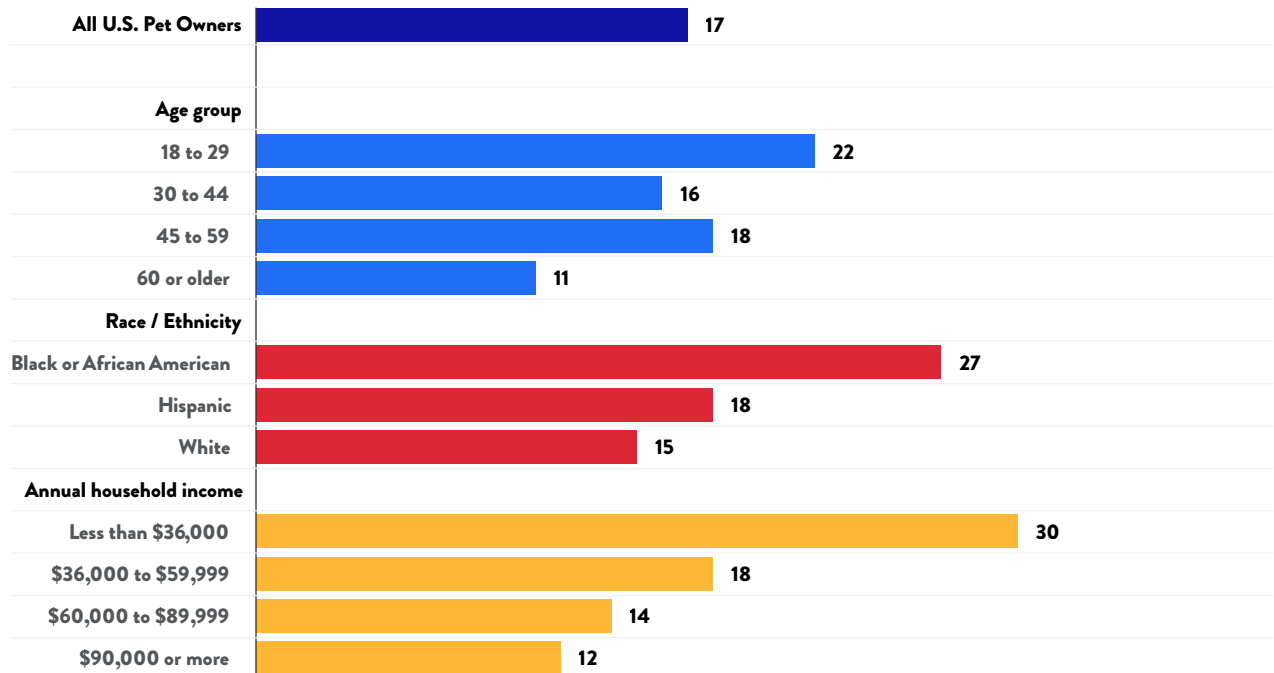
Perhaps more importantly, some pet parents do not consult a veterinarian, even when their pet is sick or injured. **Nearly one in five pet parents (17%) say they only seek advice from non-veterinary resources when their pet is sick or injured.** This is particularly true of several groups who are most likely to say they have declined or forgone veterinary care in the past, including those in households earning less than \$36,000 per year (30%), Black pet parents (27%) and 18- to 29-year-old pet parents (22%). This may suggest that some of these owners seek alternative sources of veterinary information not out of preference, but because they are unable to access veterinarians due to cost or other barriers.



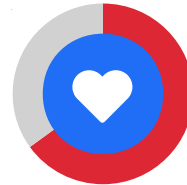
Nearly 1 in 5
pet parents
(17%) say they only seek advice from non-veterinary resources when their pet is sick or injured.

CHART 8
PET PARENTS WHO ONLY SEEK PET HEALTH INFORMATION FROM NON-VETERINARY SOURCES

% Pet owners who have needed information, but only consult non-veterinary resources



Where do you typically go for information about your pet’s health if you think they are sick or injured?
Select all that apply.



About two-thirds of pet parents

(65%) say that if their pet required life-saving treatment, the amount they would be able to pay for the cost of that treatment would be \$1,000 or less.

In addition to diversifying the types of care offered, one policy that could increase access to recommended care is the expansion of accessible payment plans that would allow pet parents to finance the cost of large veterinary bills over time without interest. **About two-thirds of pet parents (65%) say that if their pet required life-saving treatment, the amount they would be able to pay for the cost of that treatment would be \$1,000 or less.**

CHART 9

AMOUNT OF MONEY PET OWNERS COULD AFFORD TO SPEND ON LIFE-SAVING CARE FOR THEIR PET

■ \$0; I would not get the treatment ■ Up to \$250 ■ Up to \$500 ■ Up to \$1,000 ■ Up to \$5,000
 ■ Up to \$10,000 ■ More than \$10,000

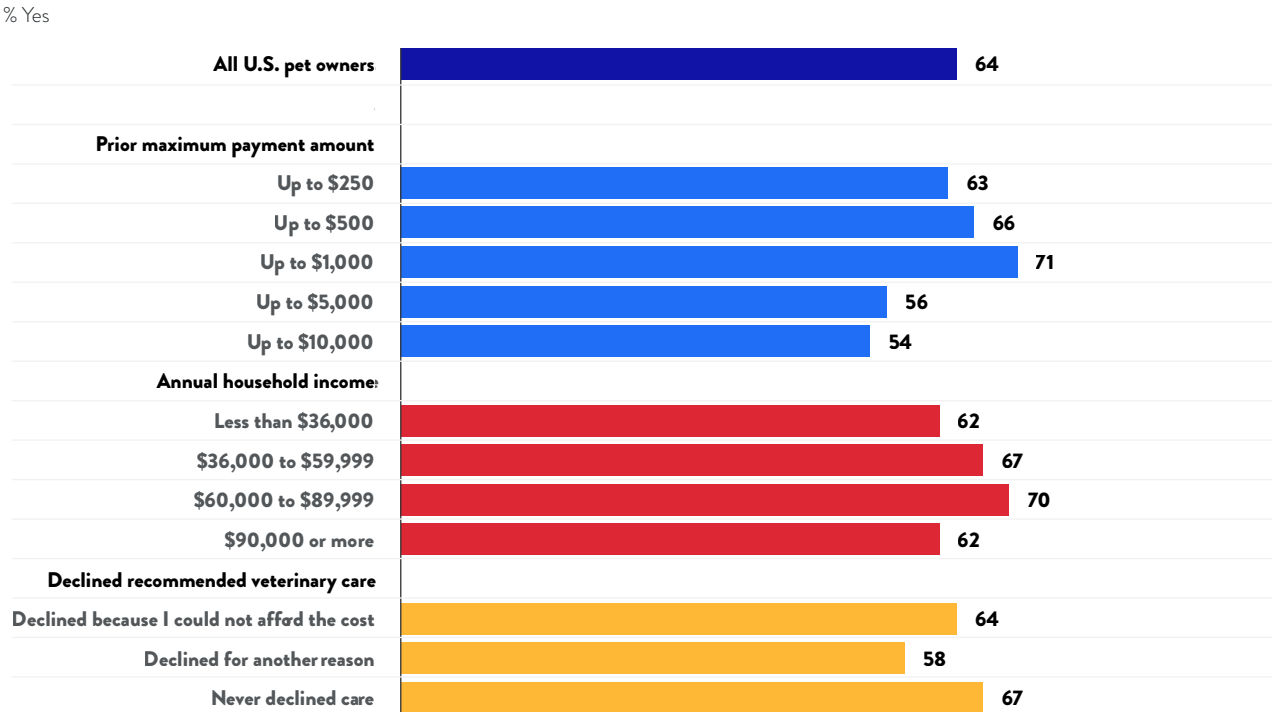


Imagine your pet had a life-threatening condition and your pet's life was at risk if they did not receive treatment. How much would you be able to pay for this treatment?

Due to rounding, percentages may sum to 100%, +/- 1.

Interest-free payment plans would significantly increase most pet parents' cost ceilings. Nearly two-thirds of pet parents (64%) say that if their veterinarian offered them the option to pay the cost of life-saving care over a one-year period through an interest-free payment plan, they could at least double the amount they previously said they would be able to afford for that care. This is especially true among owners who said their maximum budget for life-saving care would be \$1,000 or less.

CHART 10
IMPACT OF INTEREST-FREE PAYMENT PLANS ON PET PARENTS' MAXIMUM BUDGET FOR LIFE-SAVING CARE



Imagine the treatment for your pet's condition cost twice the amount you said you'd be able to pay. Would you be able to pay that amount if your veterinarian allowed you to pay over a one-year period through an interest-free payment plan?

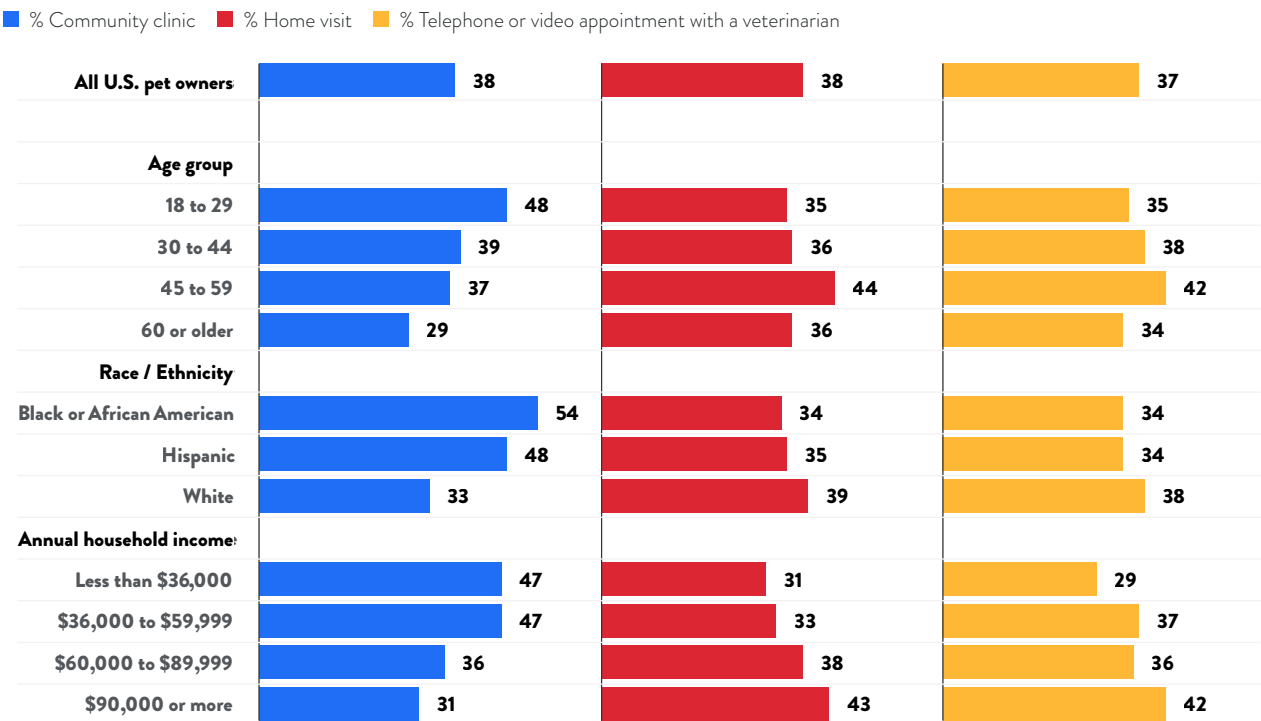
Despite the positive impact that interest-free payment plans could have on pet parents struggling to afford veterinary care for their pets, most have never been given that option. About one in four pet parents overall (23%) say their veterinarian has offered them a payment plan in the past; importantly, this percentage is only marginally higher among owners who likely stand to gain the most from such an option, including those who have declined care in the past due to affordability (27%), as well as those earning less than \$36,000 per year (28%).

While availability or awareness of these plans is just one of several hurdles that may not fully be within the control of veterinarians, the data suggest alternatives to the “payment due at time of service” model may reduce the percentage of pet parents who decline care they do not believe they can afford.

MANY PET PARENTS ARE INTERESTED IN NON-TRADITIONAL CARE OPTIONS.

Beyond diversified types of care and options to pay for it, many pet parents express interest in receiving that care outside of traditional veterinary offices, perhaps in an effort to navigate accessibility barriers — such as transporting pets to a veterinarian’s office or attending appointments during standard business hours — in addition to financial concerns. Nearly four in 10 pet parents who have ever brought their pet to the veterinarian say that if the option were available to them, they would be interested in using community clinics (38%), home visits from a veterinarian (38%) or telemedicine (37%) to get care for their pets.

CHART 11
PET PARENTS’ INTEREST IN NON-TRADITIONAL VETERINARY CARE FORMATS



Which of the following types of veterinary care would you use if it were available to you?
Select all that apply.

While significant portions of pet parents across age, race and income brackets express interest in at least one of these non-traditional care options, it is important to note that several of the groups who are least likely to visit the veterinarian regularly are particularly interested in community clinics. This includes roughly half of Black (54%) and Hispanic (48%) pet parents, 18- to 29-year-olds (48%), and pet parents from households earning less than \$60,000 per year (47%).

However, increased availability of these care formats may be constrained by resources or legislative limitations. For example, nine states do not permit veterinary telemedicine, and just eight states allow veterinarians to establish a veterinarian-patient relationship via telemedicine without having previously seen or examined the pet.³ Pet parents express clear interest in non-traditional venues that could expand access to care for those struggling to do so.

3 <https://vvca.org/resources/telemedicine-map/>



IMPLICATIONS

For most pet parents, there has been a time when the recommendation of a veterinarian has run up against the practical realities of their circumstances. Deciding whether they can afford or administer care that a veterinarian believes is in the best interest of their pet, or whether the cost or stress of the treatment is worth it, is an agonizing choice — especially for those who understand that not moving forward with treatment puts the life of their pet at risk.

Through the PetSmart Charities-Gallup State of Pet Care study, pet parents have given veterinary professionals clear indications of the ways in which the current environment is not meeting their needs, or the needs of their pets. As veterinary care costs have risen more than 60% since 2014,⁴ pet parents are clear that financial considerations are the primary barriers to care, but also share that certain types of care are just not practical for them or their pet. If these barriers persist, tens of millions of the roughly 70 million American households that own at least one cat or dog will likely continue to forgo the care that veterinarians say their pets need. In some cases, this will lead to the worst possible outcome for pets and their families. Moreover, owners say the care recommendations they receive are often rigid, with alternatives rarely offered when they cannot take the initial recommendation.

But these pet parents have also shared valuable insights into how the veterinary community can break down barriers to care. Wider availability of interest-free, or more accessible payment plans may help those struggling financially to afford needed care for their pets. Increased availability of community clinics or telemedicine could also allow those who struggle most with accessing care to utilize options that are more affordable or more flexible. Additionally, veterinary professionals' awareness of other veterinary resources in the area that may offer services that better fit patients' needs could help ensure all options have truly been exhausted before pet parents make the difficult decision to decline necessary healthcare for their family pets.

⁴ <https://www.nytimes.com/2024/06/23/briefing/the-costs-of-caring-for-pets.html>



METHODOLOGY

Results for the PetSmart Charities-Gallup State of Pet Care study are based on a combined web- and mail-based survey conducted with 2,498 dog and cat owners in the United States. Gallup surveyed 2,307 U.S. adults who indicated they currently owned at least one dog or cat via a web-based survey Nov. 13-20, 2024. Gallup also surveyed an additional 191 dog and cat owners via a mail-based survey Dec. 2, 2024-Jan. 9, 2025, to reach pet owners who may not have access to the internet.

Gallup used the Gallup Panel to randomly select respondents to participate in the study. The Gallup Panel is a probability-based panel of U.S. adults who are randomly selected to join the panel primarily through address-based sampling (ABS), as well as random-digit-dialing (RDD) telephone surveys.

Gallup weighted the obtained sample to match national demographics of gender, age, race, Hispanic ethnicity, education and region for the population of U.S. dog and cat owners. This was achieved by weighting all respondents who entered the survey — including those who indicated they did not currently own a dog or a cat — to demographic weighting targets of the total U.S. adult population, based on the 2024 U.S. Current Population Survey. Respondents who indicated they did not currently own a dog or cat were then removed from the dataset prior to analysis.

For results based on the total sample of 2,498 U.S. dog and cat owners, the margin of sampling error is ± 2.6 percentage points at the 95% confidence level. Margins of error for subgroups are larger. The reported margin of sampling error includes computed design effects for weighting. In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls.

GALLUP®

World Headquarters

The Gallup Building
901 F Street, NW
Washington, D.C. 20004

t +1.877.242.5587

f +1.888.500.8282

www.gallup.com