



# Pet Owner Attitudes Toward Natural Nutrition

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Proceedings from a CE-credit seminar conducted at the 2010 Central Veterinary Conference in Kansas City. The seminar also included studies conducted with veterinary practitioners, covered in a previous report.

As pet owner relationships have evolved over the years, so have consumer demands for pet food options. In recent years, there has been explosive growth in pet foods with a natural claim. Practitioners may be challenged to explain natural pet food to clients who seek their recommendation. A recent sample of consumer attitudes toward natural nutrition offers several implications for practitioners and animal health nutritionists.

First, let's recap the evolution of pet nutrition, natural claims and a current industry definition which we will compare with pet owner perceptions.

## A brief history of pet nutrition.

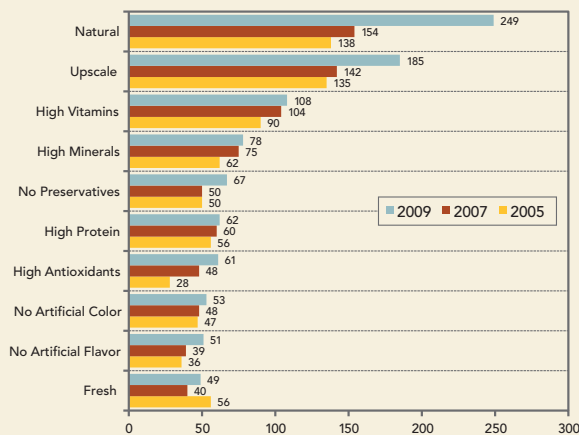
The first commercial pet foods mirrored knowledge being discovered in human nutrition. Vitamin, macronutrient and micronutrient requirements were being researched, however, pet foods were not "complete and balanced" as we know them now to be.

Beginning in the 1960s, we began to learn more, not only about nutrition in general, but also the specific nutrient needs of dogs and cats. Among the more important developments were life stage nutrient requirements for puppies and kittens, and the emergence of clinical and geriatric diets, concurrent with new findings in nutrition and improvement in veterinary care.

In recent years, socio-economic and cultural changes as well as consumers' humanization of pets have driven both increased variety and overall growth in

pet products, particularly foods. Those products with the largest growth are premium dog and cat foods, treats, healthcare products and dietary supplements. All these point to consumer interest in health, happiness and wellness for their pets.

Top Marketing Claims (New Products)



Source: Packaged Facts Pet Market Outlook 2010-2011

The largest and fastest-growing segment is natural products which have almost doubled since 2005. In 2009 alone, some 250 new products were introduced with a natural claim.

## What is natural?

Most in our industry turn to the definition created by the Association of American Feed Control Officials (AAFCO). AAFCO develops and implements guidelines for the creation of regulations and policies that control the manufacture, distribution and sale of animal feeds including pet foods. However, the definition is not only very broad but also open to interpretation:

*"A feed or ingredient derived solely from plant, animal or mined sources, either in its unprocessed state or having been subject to physical processing, heat processing, rendering, purification, extraction,*

hydrolysis, enzymolysis or fermentation, but not having been produced by or subject to a chemically synthetic process and not containing any additives or processing aids that are chemically synthetic except in amounts as might occur unavoidably in good manufacturing practices.”

Pet owners have a much broader and understandably less-scientific interpretation, as was seen in a recent initiative.

## Highlights of consumer focus group discussions

How do consumers define *natural*? What do they consider not *natural*? Unlike a veterinary survey also conducted this year on behalf of The Nutro Company, data from consumers is completely qualitative but it does offer some interesting insights.

Earlier this year, Catapult Marketing Group LLC conducted six, two-hour consumer focus group discussions in San Francisco, CA. Participants were selected for their propensity to purchase natural or organic foods. Four of the groups were comprised of dog owners; two of the groups were cat owners. Across all groups, 20% were male and 80% female.

### What is “Natural”?

**Organic** Less Additives 'Not Purina' No added preservatives  
Not from a supermarket NO BY-PRODUCTS HIGH PROTEIN  
Made for specific breeds Ingredients I can pronounce  
Made with quality meats Specific proteins (lamb, chicken, turkey, fish)  
Contains lots of meat **Nutro** Expensive CONFUSING!!  
I know what it means for human food, but not so sure for dog food  
Vet recommended Flash dried? The vet said IAMS is natural  
I never really thought about it like that The bag that says 'active' or 'weight control' How can dog food be natural since it's kibble?  
Homemade pet foods Frozen specialty dog food Royal Canin

Source: Catapult Marketing Group LLC (2009)

Displayed in “word cloud” fashion in which the most-recommended terms are larger in size, it is perhaps not surprising that *organic* was frequently mentioned. Others most often associated included *no by-products*, *high protein* and few brand names.

Interestingly, *vet recommended* received quite a few votes. This speaks well to the influence of the practitioner. And from the veterinary

survey covered in the previous report, 55 to 60 percent of practitioners said they actively discuss nutrition with clients and that, on an annual basis, they recommend to approximately one-third of all clients that they change their pet’s non-prescription diet. Veterinarians were not specifically asked why they recommended a switch to such a large percentage of clients, but we can surmise that pet life stage, a change in appetite or a condition not requiring a specific clinical diet may contribute to the recommendation.

Also, nearly 40% of the veterinarians surveyed reported they were getting more client inquiries about natural pet food over the past year. We believe that this tracks with increased pet owner interest in natural foods—they are purchasing natural foods more frequently and asking more questions.

But this does present a challenge to practitioners given that there is a slim body of published research specific to aspects of natural nutrition, such as digestibility, specific or systemic health benefits, ingredients and manufacturing processes to help veterinarians evaluate and recommend natural diets with confidence.

When asked, “What do you believe is the opposite of *natural*?” consumers most frequently cited characteristics in the chart below. I believe most of us in the veterinary and animal nutrition communities have no argument with several of these, including *additives*, *synthetic* and *preservatives*.

### What is the opposite of “natural”?

- Processed
- Added sugar
- Comes in a box
- Polluted
- Obstructed
- Contaminated
- Synthetic
- Bioengineered
- Manmade
- Added chemicals
- With preservatives
- Not fresh
- Contains high fructose corn syrup

Source: Catapult Marketing Group LLC (2009)

Let's look back at what consumers considered natural and what many in our profession believe. A disconnect should be quite clear. First, *organic*. That has been clearly defined and is regulated, and thus is very different from natural. As for proteins, we know there's both high-quality and low-quality, and that a low-quality protein that is minimally processed remains low-quality. Consumers perceive "processed" as negative; they do not understand that the profile, amino acid quality and other nutritional aspects of a protein are just as important as how a protein is processed. Conversely, *homemade* and *fresh* are examples of consumers projecting their perceptions of human foods to pet foods. *Fresh* can perhaps provide some nutritional benefit, but few if any in the veterinary or animal nutrition communities would feel comfortable suggesting that pet food prepared at home would meet the specific nutritional needs of canines or felines.

## Demographic and cultural changes drive demand for natural pet foods

We accept consumer demand for natural pet foods, but what is driving that demand? Consider these demographics:

- A growing percentage of the population is older. They have the means to care for and the desire to have pets as companions
- Young adults—whether single or married—are opting for four-legged children
- The population of Americans living in urban centers is growing, driven by highly educated,

### Fastest Growing Segments

- Global market (1998–2009)
  - Premium dog food (8%)
  - Cat treats (8%)
  - Healthcare (7%)
  - Dog treats (6%)
  - Premium cat food (6%)
  - Dietary supplements (5%)

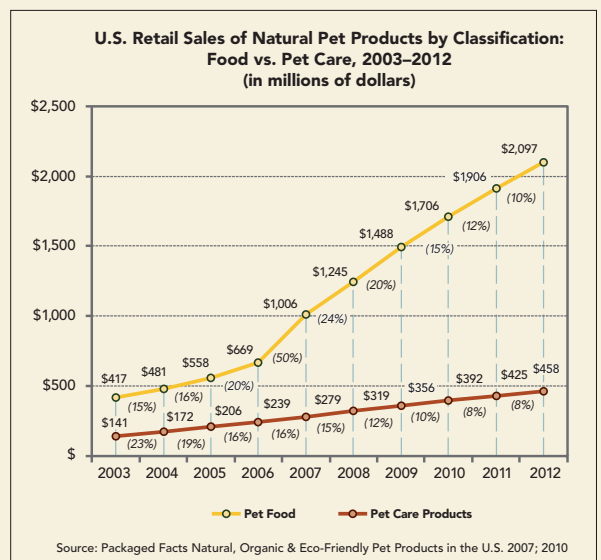
Source: Euromonitor International (L. Linthicum; 2010)

sophisticated "new professionals," many with at least one companion animal

- More disposable income has translated into increased spending on pets

Finally, for every two people in the U.S., there is a dog or a cat—75 million dogs and roughly 90 million cats—and they are treated as family. They live, eat and sleep with us and so, are treated much differently than in decades past.

Regardless of the economy, pet owners continue to purchase for their pets with a decided focus on health and wellness, reflecting the humanization of companion animals and their position not as pets but as members of the family. As the chart shows, among purchase of pet products with a natural or organic claim, natural pet food sales have skyrocketed in recent years.



I believe that the humanization of pets is beneficial to all of us, not solely to skillful marketers. Pet owners are more engaged. They're voting with their minds, hearts, feet and wallets that their pets' health and well-being is a priority. They're taking more interest in nutrition. They're opting for diets that they believe in, and more and more, they believe in *natural*. It is our responsibility and charge to qualify *natural* as more than a marketing claim, and to equip practitioners to discuss and recommend natural diets based on science and a sound nutritional perspective.

*Dr. Swanson's seminar included studies conducted with veterinary practitioners regarding their awareness of and attitudes toward natural nutrition, covered in a previous report. Copies of that report, other veterinary resources and the CE-credit seminar are available online and on-demand at [TheNutroCompany.com/Veterinarians](http://TheNutroCompany.com/Veterinarians).*



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### About The Nutro Company

The Nutro Company has been researching and perfecting pet food for over 80 years. Our mission is to provide superior, natural foods fortified with vitamins and minerals that you can recommend to your clients with confidence. Our diets are made exclusively from the finest ingredients and come in a range of premium formulas based on pets' individual physiological and nutritional needs.

Working in concert with WALTHAM, THE WORLD'S LEADING AUTHORITY ON PET CARE AND NUTRITION® and leading veterinary nutritionists, we are committed to further explore natural pet nutrition and how diets can best provide what nature requires. Our collaboration will result in informational and educational tools for the veterinary community and your clients.

