



ELANCO COVID-19 DOG SOCIALIZATION SURVEY

Methodology

Elanco Animal Health and [TRUE Global Intelligence](#), the in-house research practice of FleishmanHillard, fielded an online survey of 1,000 adults 18 and older in the United States who own at least one dog.

The survey was fielded from June 25 – June 30, 2020 and the sample was census-balanced for age, gender and geographic region.

Objectives

- Understand the emotional connectivity between dog owners and their dogs
- Illustrate the change in activities and socialization that dog owners have undertaken with their dogs since the onset of the COVID-19 pandemic, and understand how these behaviors might change in the long-term
- Generate newsworthy statistics about the impact of COVID-19 on the "man's best friend" relationship

Summary of Findings

The COVID-19 pandemic has changed the long-term relationship between dogs and their owners.

Consumers have reevaluated their priorities during the pandemic and are not only spending more time with their dogs, but want to integrate their dogs more into their daily lives after the pandemic ends.

- **DATA:**
 - Not only are people spending more time with their dogs on average, a strong majority (68%) say their dogs have become even more of an emotional companion over the course of the pandemic.
 - Gen Z in particular is reaping the social benefits of dog ownership. Nearly half (45%) report including their dog in a social video chat during the pandemic.
 - Three-quarters (75%) of Gen Z, Millennials and Gen X reported they have become more emotionally attached to their dog compared to just 55% of Baby Boomers and Silents.
 - Across all genders and generations, dog owners reported a 14% increase in desire to spend more time with their dog than they did before the pandemic.
 - After the pandemic ends, dog owners reported they are 10% more likely to work from home more often to spend time with their dog.
 - Dog owners report they're 11% more likely to take their dog more places after the pandemic ends than they did before COVID-19.

Dog owners' priorities and spending habits have evolved. *While respondents report spending the same amount on their dogs, they are prioritizing purchase of treats and chews and health-related categories, showing owners are pampering their dogs more so than they did before the pandemic. In focusing their*

spending on health and leisure for their dog, the survey results suggest dog owners are keeping their dogs' health, wellness and overall happiness the top priority.

- **DATA:**
 - People are pampering their dogs more than before the COVID-19 pandemic, spending more on toys (+9.7%) and treats (9.7%).
 - Dog owners reported a 22.2% increase in spend on supplements and OTC medication.
 - Almost 60% of dog owners reported they're spending the same amount or more on their dogs during the pandemic than they did before.

Dog owners' relationship with their dogs differs across gender and generation, uncovering implications across life stages. *Men report higher rates of social connectivity with others through their dogs – they're meeting new people and connecting with other dog owners through shared activities. But, women report spending more time with their dogs than men and experience the relationship with their dogs more personally and emotionally, while their male counterparts report their relationship with their dog as social. Younger generations are increasing the time they spend with their dog each day significantly more than older generations. Additionally, Millennials are getting new dogs at 4x the rate of Baby Boomers, potentially due to differences in life stage.*

- **DATA:**
 - Men are three times as likely to have gotten a new dog during the pandemic than women (15% vs. 5%).
 - Men more so than women report significant social benefits of dog ownership, despite the fact that women spend more time on average per day with their dogs than men do (70% vs. 56%).
 - Gen Z in particular is reaping the social benefits of dog ownership. Nearly half (45%) report including their dog in a social video chat during the pandemic.
 - Across demographics, dog owners reported their concern for bringing their dog to public places was nearly the same as their concern for bringing their children to public places (7.69 vs. 6.98).
 - Women (41%) are spending more time outside with their dogs than men (29%).
 - Women (57%) are more likely to worry about the sanitation of public places they bring their dog to than men (45%).

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ABOUT ELANCO

Elanco Animal Health (NYSE: ELAN) is a global leader in animal health dedicated to innovating and delivering products and services to prevent and treat disease in farm animals and pets, creating value for farmers, pet owners, veterinarians, stakeholders, and society as a whole. With nearly 70 years of animal health heritage, we are committed to helping our customers improve the health of animals in their care, while also making a meaningful impact on our local and global communities. At Elanco, we're driven by our vision of Food and Companionship Enriching life and our Elanco Healthy Purpose™ CSR framework – all to advance the health of animals, people and the planet. Learn more at www.elanco.com.