

# ‘All of the Above’ and pet product channel shopping trends

Omnichannel shopping continues to evolve as pet owners eschew the either/or concept and use whatever’s most convenient.



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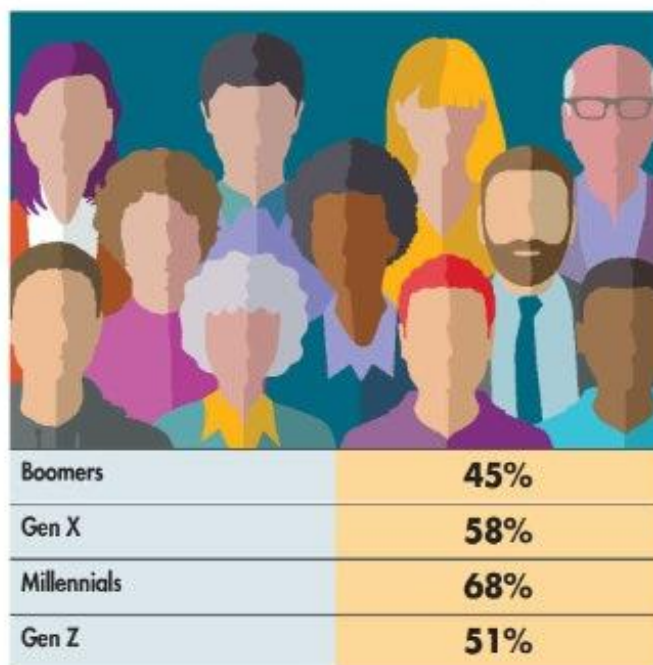
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In an “[omnimarket](#)” world of pet industry competition, how do retail shopping patterns play out for pet food? Discount stores/supercenters (including Walmart) and supermarkets combined are the top channel for pet food shopping, according to MRI-Simmons Spring 2024 data, drawing 56% of category purchasers. Rounding out the [top three channels](#) for pet food purchasing are online (36%) and pet specialty stores (31%). Overall pet food shopping rates are fairly consistent across the Gen Z to Boomer generations for these top channels.

**AGREEMENT WITH THE STATEMENT\*,  
"MY PET PRODUCT SHOPPING PATTERNS  
ARE 'ALL OF THE ABOVE,'" MAY 2024**  
(% COMPLETELY OR SOMEWHAT AGREEING)



\* NOTE: The survey question was, "My pet product shopping patterns are 'all of the above' – both in-store and online, and through different stores or websites."

SOURCE: Packaged Facts, "US pet product retail and internet shopping trends," 2024  
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**TABLE 1:** Pet omnichannel shopping has truly taken hold among all generations in the U.S., according to survey responses.

## Shopping patterns by generation

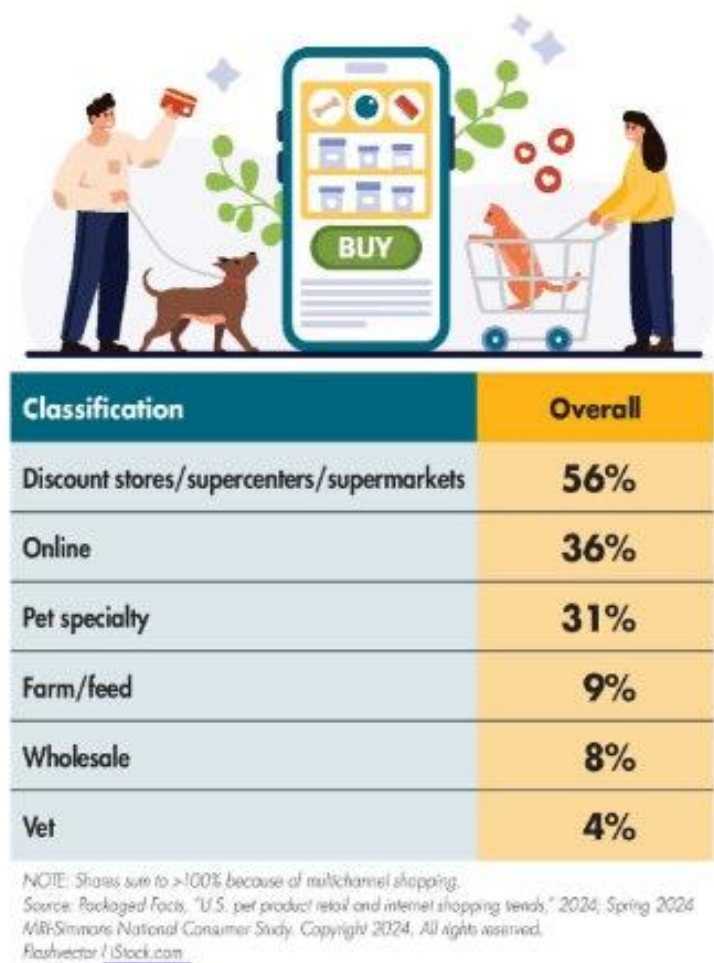
Looking at pet food shopping patterns by generation for individual retail and e-tail leaders:

- In the discount store/supercenter arena, shopping rates across generations are very consistent for Walmart, which draws 32% of pet food shoppers overall — edging up slightly to 34% of Gen Zers, the generation most likely to be dollar-stretching. A younger-generation skew is somewhat sharper for Target, which draws at 10%–11% of Gen Z and Millennials pet food shoppers and 9% of their Gen X and Boomer counterparts.
- With e-commerce, Chewy draws a lower share of Gen Z pet food shoppers — at 20%, compared with 23%–25% of the Millennial through Boomer generations. Amazon, drawing 15% of pet food shoppers overall, shows more consistent patterns across generations.

- In the pet specialty channel, PetSmart and especially Petco show a younger-generation customer skew. For PetSmart, which draws 18% of pet food shoppers overall, shopping rates slip slightly from 19% of Millennials to 17% of Boomers. For Petco, drawing 13% of pet food shoppers overall, shopping rates slip from 16% of Gen Z to 12% of Boomers.

With pet products, as for consumer-packaged goods generally, looking at cross-channel shopping patterns is as important as looking at the shopper draw for individual retail channels or retailers. [Packaged Facts'](#) May 2024 Survey of Pet Owners shows that 56% of pet owners describe their overall pet product shopping patterns as “all of the above” — that is, “both in-store and online, and through different stores or websites.” (See Table 2.) This figure rises to 68% among Millennials and slides down to 45% among Boomers.

### PET FOOD CHANNEL SHOPPING PATTERNS, 2024 (% OF PET HOUSEHOLDS)



**TABLE 2:** Pet omnichannel shopping has truly taken hold among all generations in the U.S., according to survey responses.

# E-commerce vs. in-store shopping patterns

With pet products, how does this play out in a battle between e-commerce and in-store shopping? In keeping with Chewy's pet specialty focus, cross-shopping for pet products is slightly higher between Chewy and the pet specialty channel (at nearly 8% of customers) than between mass-market Amazon and pet specialty stores (at nearly 6%).

For Millennial pet parents — both the largest generational cohort of pet owners and the most prone to “all of the above” shopping — cross-shopping between Chewy or Amazon and other retailers runs particularly high. As shown by MRI-Simmons data:

- Millennial cross-shopping for pet products is particularly high between Amazon and Target (at an index of 132, or 32% above the overall pet product shopper average), and also high between Amazon and Petco (index of 119) and Amazon and PetSmart (index of 117).
- Similarly, Millennial cross-shopping is high between Chewy and Target (index of 122, or 22% above average), Chewy and Petco (index of 118), and Chewy and PetSmart (index of 115).

With Millennial as well as Gen Z shoppers, Amazon is particularly a threat to traditionally brick-and-mortar-based retailers. Cross-shopping between Amazon and pet superstores is high among Millennials (at an index of 117 for PetSmart and an index of 119 for Petco), and even higher among Gen Z (at an index of 145 for PetSmart and an index 139 for Petco). With Boomers, in contrast, cross-shopping indexes between Amazon and these pet superstores range low, at an index of 73 (27% below average) for PetSmart and of 77 (23% below average) for Petco.

Various armed with shopping technologies, and variously influenced by the internet and social media, “all of the above” younger-generation shoppers are deft at evading or shedding either/or choices. Therefore, generational trends keep raising the bar for keeping pet product shoppers in your corner.

This competitive reality underlies the game-changing recent history of pet industry dynamics: omnichannel, autoship/subscribe & save, border-crossings between pet products and vet/pet services, and increasingly “all of the above” market positioning and customer loyalty programs. Walmart's October 8, 2024 announcement of “Pet Care Unleashed” — new service locations, online vet access, and prescription delivery — continues in this vein.