October Consumer Research Confirms Pet Health Remains Non-Negotiable Household Priority

November 6, 2026

Latest U.S. Survey of 2,000+ Consumers Shows 93% of Pet Owners Maintained or Increased Pet Spending in Past Three Months, Omnichannel Shift Redefines Purchasing

INDIANAPOLIS, Nov. 6, 2026 /PRNewswire/ -- Elanco Animal Health Incorporated (NYSE: ELAN), today released findings from its latest U.S. consumer research, demonstrating that pet owners continue to fiercely protect health spending for their pets, affirming expectations for enduring strength of the animal health sector.



According to the national omnibus survey of 2,018 U.S. consumers, including 1,495 dog and cat owners, fielded in mid-October 2026, pet health and wellness remains an indispensable household priority even as families navigate cost-of-living pressures:

- **Pet Health Remains a Protected Household Priority:** Despite broader macro pressures, 93% of pet owners surveyed maintained or increased pet spending over the past three months.
- **Increasing Pet Spend Expected:** 32% of pet owners surveyed said they increased spend on their pets in the past three months, while 93% expect to maintain or increase spending in the year ahead, remarkably consistent with earlier Elanco surveys in February (93%) and May (91%).
- **Pet Health is the Last Place Consumers Cut:** Just 7 percent of surveyed consumers would cut pet health spending under economic pressure, far below dining out and entertainment (54 percent), travel (44 percent), and digital subscriptions (33 percent).
- **Deepening Humanization and Healthspan Mindset:** 87% of surveyed pet owners affirm their pet's happiness and wellbeing is as important as their own, with nearly two-thirds (63%) saying it is *more* important. The primary motivations driving spend: keeping pets healthy and living longer (65%), seeing them happy and comfortable (59%), and treating them as family members (54%).

"Our October data reinforces what we see every day across the marketplace: pet health is not a discretionary luxury, but a deeply emotional, non-negotiable commitment," said Bobby Modi, Executive Vice President, U.S. Pet Health and Digital Transformation at Elanco. "Even in challenging macroeconomic environments, pet parents consistently prioritize the health, comfort and longevity of their animals. We have seen this in Elanco's results with strong growing demand for our pet health innovations that continue to build the standard of care, reinforcing our expectations for exceptional resilience for our pet health business."

Vet Visit Volume and Medication Spend Decoupling
The October study also provides critical clarity on how pet owners access care and purchase medications, confirming that changing consumer habits are expanding access points while still relying on the veterinarian as the ultimate trusted authority.

In the survey, 38% of pet owners say they've shifted their pet medication purchasing outside the clinic in the past year or two, expanding total access without sacrificing care.

Respondents report pet medication purchases are now distributed across diverse channels:

- in-person veterinary clinics (37%),
- home-delivery through veterinarian's online pharmacy (17%),
- online pet specialty pharmacies (31%),
- mass retail/grocery (28%),
- physical pet specialty retail (27%),
- general e-commerce (25%).

Discounts Don't Drive Pet Owner Switching
Yet, a doctor's recommendation is the #1 reason a pet owner would switch medications, outweighing one-time discounts or rebates (3%).

"As consumer purchasing habits evolve toward omnichannel convenience – spanning vet clinics, retail shelves, and vet home delivery – Elanco's broad omnichannel portfolio is purpose-built to meet pet owners wherever and however they choose to shop," added Modi. "Importantly, vet visits are no longer a leading economic indicator for pet spend."

Future Pet Demand
Finally, the survey indicated future pet demand is strong. Across all consumers surveyed, 21% expect to add a pet in the year ahead. Among current pet owners, 25% expect to adopt another pet in the next year.

About the Survey
The Elanco Pet Health Trends Omnibus survey was conducted online between October 16 and October 21, 2026, among a nationally representative sample of 2,018 U.S. adults aged 18 and older, including 1,495 dog and cat owners aged 18-80.

ABOUT ELANCO
Elanco Animal Health Incorporated (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 70 years of animal health heritage, we are committed to breaking boundaries and going beyond to help 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 are driven by our vision of Food and Companionship Enriching Life and our purpose – all to Go Beyond for Animals, Customers, Society and Our People. Learn more at www.elanco.com.

CAUTIONARY STATEMENT REGARDING FORWARD-LOOKING STATEMENTS
This press release contains forward-looking statements within the meaning of the federal securities laws, including, without limitation, statements concerning our expectations regarding our industry, operations, performance and financial condition, including expected consumer trends, market dynamics, competitive landscape and industry growth. Forward-looking statements are based on our current expectations and assumptions regarding our business, the economy and other future conditions. Because forward-looking statements relate to the future, by their nature, they are subject to inherent uncertainties, risks and changes in circumstances that are difficult to predict. As a result, our actual results may differ materially from those contemplated by the forward-looking statements. Important risk factors that could cause actual results to differ materially from those in the forward-looking statements include regional, national or global political, economic, business, competitive, market and regulatory conditions, and additional factors that could cause actual results to differ materially from forward-looking statements described in the company's latest Form 10-K and Form 10-Qs filed with the Securities and Exchange Commission. We caution you against relying on any forward-looking statements, which should also be read in conjunction with the other cautionary statements that are included elsewhere in this press release. Any forward-looking statement made by us in this press release speaks only as of the date thereof. We undertake no obligation to publicly update or to revise any forward-looking statement, whether as a result of new information, future developments or otherwise, except as may be required by law.

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