



CATalyst Council

State of the Cat: Wellness & Nutrition

Industry Summary Report 2024

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CATalyst Council 2024 State of the Cat: Wellness & Nutrition Report



About This Report

The CATalyst Council 2024 State of the Cat: Wellness & Nutrition report provides insights on cat care, perspectives on veterinary care delivery, and the overall state of feline wellness and nutrition in the United States. Commissioned by the CATalyst Council and conducted by M/A/R/C® Research, the report offers actionable insights for veterinary practitioners, feline health organizations, and animal health industry stakeholders.

About CATalyst Council

CATalyst Council advances feline health through species-specific intelligence to drive evidence-based innovation and lifelong care. As the veterinary industry's trusted authority on the U.S. feline market, the organization brings this mission to life through research, collaboration, and industry-wide engagement.

For nearly two decades, CATalyst Council, a national 501(c)(3), has united veterinary leaders, industry partners, and data scientists to share evidence-based research aimed at improving quality of life for cats and the people who love them. Its inclusive board structure brings together a broad range of stakeholders across veterinary medicine, animal welfare, and industry, working together to change how the U.S. experiences and values cats.

CATalyst Council Additional Research

CATalyst Council also produced the CATalyst 2026 State of the Cat Report, based on a household survey of over 60,000 U.S. households, and issues the Feline Veterinary Market Insights Report™ (FMIR), an intelligence series integrating seven independent data sources with distribution to its sponsor organizations across the veterinary industry. The 2027 State of the Cat Report is currently under development, expanding the study's footprint to an estimated 70,000 U.S. households.

The organization will continue to leverage these findings to support initiatives that improve feline health outcomes and drive innovation in veterinary care delivery. Industry partners are encouraged to use this data to inform product development, practice support programs, and client education strategies.

For more information, visit www.catalystcouncil.org

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Executive Summary

The CATalyst 2024 State of the Cat: Wellness & Nutrition is designed to assess insights about cat care, perspectives on veterinary care delivery, and the overall state of feline wellness and nutrition in the United States.

Several areas of the study directly surveyed both pet owners and veterinarians on the same or closely related topics, revealing meaningful gaps between the two groups' perceptions. These disconnects represent both challenges and opportunities for the animal health industry.

There is an internal tension within veterinary practices in recognizing the feline health care opportunity and acting on it. The discrepancy between recognizing the opportunity (79%) and actively pursuing it (35%) is one of the study's most significant industry-level findings. The gap suggests that barriers beyond practice capacity may be limiting efforts to expand feline caseloads and represents an important opportunity for the profession to better understand what is preventing practices from acting on the opportunity they recognize. Findings within the study highlight veterinarian perceptions that cats are challenging to diagnose (55%) and not easy to work with during wellness examinations (34%). Veterinary respondents in this survey believe that cat owners are cost conscious and less adherent (55%) to recommendations than dog owners (77%). They feel that only 43% of cat caregivers ensure their pets receive high-quality care, yet 70% of cat caregivers signal that they would take their cat for veterinary care more often if they knew they could prevent problems and avoid expensive treatment later. These perceptions may influence how practices engage with and serve their feline clients.

Only 54% of cat caregivers state that they are completely satisfied with their primary practice. They indicate that a significant barrier to bringing cats to veterinary practices is the physical, emotional and financial stress that both they and the cat experience. Veterinarians and cat caregivers report dramatically different realities about whether stress-reduction instructions are being communicated; veterinarians believe they are providing transport guidance (65%), while only 30% of cat clients say they are receiving it. Other stressors include the experiences in the facility; cat caregivers want waiting areas and examination rooms that are not stressful to their cat. 72% of cat owners desire education to help them better understand their cat's health care needs. Most cat owners (65%) state that they would value a written examination report on the health status of the cat and recommended care over the next year. 61% want payment methods that allow them to spread out the cost of their cat's care evenly over the year, as they indicate that the costs of a routine visit are usually much higher than expected. Cat caregivers are highly bonded to their cats and of those that seek regular veterinary care, 62% state they would spend any amount of money to keep their cat healthy.

According to cat caregivers, 56% of cats did not receive veterinary care within the past 12 months. Veterinary facilities that want to provide care for more feline patients can begin by focusing on proactive client education, discussing with cat owners how health recommendations benefit them and their cat. They should prioritize team training around appropriate management of feline patients, such as always having a towel on the examination room table, examining cats where they are most comfortable, having owners present during examinations and using respectful handling techniques. Practices should consider offering wellness plans to help cat caregivers budget for preventive care as well as bundled care plans for chronic diseases. Pricing transparency by posting service costs on websites will also help owners to be prepared for the price of the visit.

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Veterinary Insights: Key Findings

The veterinary survey examined attitudes toward feline and canine patients, current care protocols, practice offerings for cats, and nutritional recommendations. Key findings are organized below.

Perceptions of Cat vs. Dog Patients

Veterinarians hold notably different views of feline versus canine patients and their owners. These views are not personal in nature, as 42% of veterinarians state that they like dogs and cats equally. Rather, cats present distinct clinical and behavioral challenges, with far-reaching implications for practice engagement.

- Only 41% of veterinarians rated cats as "easy to work with" during wellness exams, compared to 78% for dogs.
- 77% found cats' medical needs more intellectually challenging than dogs.
- Veterinarians estimated that 60% or more of their cat clients find bringing their cat to the vet very or moderately stressful, compared to 40% of dog clients.
- Veterinarians perceive that cat caregivers are less adherent than dog owners across all engagement metrics:
 - 53% of cat caregivers bring their cat in for annual wellness exams vs. 76% of dog owners.
 - 55% of cat caregivers adhere to recommendations vs. 77% of dog owners.
 - 43% of veterinarians believe that cat caregivers ensure their pet receives high-quality care compared to 74% of dog owners. In contrast, 62% of cat caregivers who regularly take their cat to the veterinarian state they would spend any amount of money to keep their cat healthy.
 - 29% of cat caregivers understand their pet's wellness needs vs. 59% of dog owners.
 - 18% of cat caregivers consistently bring their cats in for annual wellness exams vs. 72% of dog owners.

Importance of Cat Clients to Practice

Despite the challenges, veterinarians recognize the strategic importance of feline patients:

- 79% agreed that cats represent one of the most significant missed opportunities for the profession.
- 79% agreed their practice could handle an increase in cat visits without significant changes.
- Just 35% reported actively making efforts to attract more cat-owning clients.
- 50% of practices schedule the next wellness exam before the client leaves. This is the most common client retention service offered.

"79% of veterinarians agree that cats represent one of the most significant missed opportunities for the veterinary profession."

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Stress Reduction and Practice Adaptations

Veterinarians recognize that cat caregivers find it stressful to bring their cat to the veterinarian; 64% of veterinarians estimate that their cat clients are very/moderately stressed, while 47% of cat caregivers state that just thinking about a veterinary visit with their cat is stressful. Communication failures complicate the situation as 65% of veterinarians report their practice always or often provide advice to make the cat's visit less stressful. However, only 30% of cat caregivers report receiving such guidance. This represents the opportunity to provide information in different formats (email, video, text, etc.) to cat caregivers about how to safely and less stressfully transport their cats, as well as the value of low stress examinations and diagnostic testing processes. It is important that veterinary teams counsel clients about the reintroduction of the cat to the home environment after a visit or hospitalization, especially if it is a multi-cat household.

Of veterinarians not already operating as Fear Free or Cat-Friendly practices, 55% had implemented changes in the past two years to lower stress for cat patients. Common adaptations included:

- Cat-only exam rooms/waiting rooms/ entrances (40% of practices)
- Low-stress handling techniques (22%)
- Pheromone products such as Feliway in exam rooms (76%)
- Towels on exam tables (6%)
- Pre-visit gabapentin protocols (24%)

Despite these efforts, only 20% of practices are Fear Free certified and just 8% hold Cat Friendly Practice certificates. Notably, 75% of respondents were unaware of their own practice's certification status.

When veterinarians were asked about in-clinic team training to make cat visits less stressful, just 35% reported that all veterinary teams received this training.

Wellness Protocols and Annual Exams

Veterinarians broadly recommend annual wellness exams across all life stages, but compliance rates fall significantly short. Compounding cat caregiver adherence to recommendations is the veterinary perspective regarding the willingness of cat parents to bring in their pets more frequently; 33% of veterinarians do not believe that cat caregivers will bring their pets in more often, no matter what they do and 12% don't consider it their responsibility to convince cat caregivers that their pets require more frequent wellness examinations.

Written examination reports represent an opportunity for practices to enhance their feline offerings and gain improved recommendation adherence. Given that 60% of veterinarians believe cat caregivers are stressed during the visit and 55% of cat caregivers don't follow recommendations, it is possible that cat caregivers are not able to actively hear, or may not remember, veterinary care advice:

- 26% of veterinarians report they provide a written examination report on the health status of the cat and recommended care over the next year.
- 65% of clients were very or somewhat interested in receiving a written report about their cats.

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Additional insights around feline wellness care include an enhanced opportunity to educate cat caregivers about the social, emotional and environmental needs of cats:

- 75% of veterinarians report that they provide information about the cat's environment and housing to about 23% of cat caregivers.
- 75% of veterinarians estimate that they routinely provide information about exercise and physical activity to 15% of cat caregivers.
- 75% of veterinarians offer feline behavior education to roughly 13% of cat caregivers.

72% of cat owners want more education to help them understand their cat's health care needs.

83% of veterinarians recommend once yearly visits for cats ages 1-10. Beginning at age 11, 68% of veterinarians recommend that cats are examined every six months.

- 92% of cat caregivers agree that more frequent examinations are needed for older or overweight cats.
- 70% of cat caregivers agree that they would bring their cat in for examinations more frequently if they knew it would help prevent problems and avoid expensive treatments later.

Nutritional Recommendations

Nutritional counseling for cats is largely reactive rather than proactive.

- 98% of veterinarians make nutritional recommendations for cats with nutrition-responsive disease states (e.g., renal disease, diabetes).
- 94% of veterinarians state that they make nutritional recommendations for obese cats.
- Only 24% routinely make nutritional recommendations for healthy cats.
- Top barriers to nutritional recommendations: client disinterest (45%) and insufficient time (42%).
Validating the perception of possible client disinterest is that 72% of cat caregivers feel comfortable and well informed about nutritional needs.
- An opportunity to educate cat caregivers about food relates to their concerns about future health problems.
 - 42% of cat caregivers are concerned about their cat developing osteoarthritis/pain in the future.
 - 39% of cat caregivers are concerned about their cat developing obesity.
- 3 out of 5 veterinarians reported that 50% or more of their cat patients with a nutrition-responsive condition receive an appropriate therapeutic diet.
- Palatability (81%) and cost (78%) were identified as the top client factors when selecting a diet.

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Pet Owner Insights: Key Findings

The pet owner [caregiver] survey examined cat acquisition, ownership attitudes, veterinary care behaviors, and health awareness. Nutritional insights are included in the Key Veterinary Finding section. Below are the primary findings across these domains.

Cat Acquisition and Ownership Profile

Cat ownership in the United States is frequently unplanned, and the acquisition process differs markedly from dog ownership. It also influences the amount of information the new owners receive about cat health needs, including nutrition and socialization.

- 63% of cat caregivers paid nothing to acquire their cat (down from 69% in the 2013 Bayer Veterinary Care Usage Study), with an average acquisition cost of just \$57.
- Most common acquisition sources: friend/colleague/neighbor/family (41%), shelter or rescue (30%), or found/stray/abandoned (26%). Only 4% came from a breeder.
- When cats were obtained through private sources (friend/colleague/neighbor/family), the new cat caregiver did not receive education about cat care. Of the cats rehomed from this source, 28% had received no veterinary care in the first 12 months of ownership.
- 58% of owners agreed the cat "found them" rather than the other way around.
- 17% of respondents were first-time cat owners; 65% described themselves as having a great deal of prior cat ownership experience.
- 70% of cats entered the household as kittens under 6 months of age.

Emotional Bond and Ownership Attitudes

Despite the often-accidental nature of cat acquisition, cat caregivers report deep emotional connections:

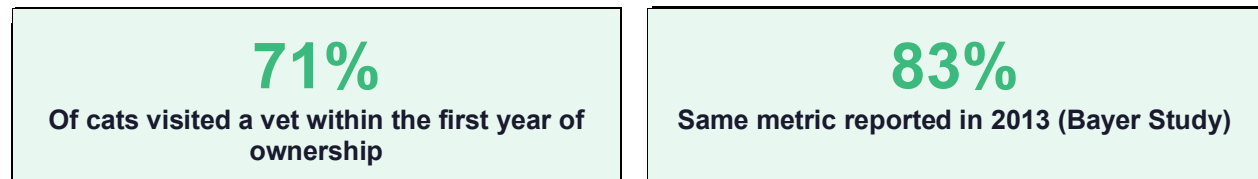
- 91% described their cat as a "member of my family."
- 84% said they enjoy being the primary caregiver for their cat.
- 77% expect they will always have at least one cat in their household.
- 49% prefer cats over dogs because cats are low maintenance; 30% because cats are less expensive to own.

62% of cat caregivers who regularly visit the vet say they would spend any amount of money to keep their cat healthy.

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Veterinary Care Utilization

The finds suggest a decline in first-year veterinary utilization:



- Only 46% of cat owners report bringing their cat in for annual wellness exams.
- 56% of cats had not visited a veterinary clinic at all in the past 12 months.
- Primary reason for last veterinary visit: vaccination-related (77%); illness (20%); injury (10%).
- 25% of owners received no wellness recommendations during their cat's initial veterinary visit or did not remember receiving any.

The top reasons cat caregivers provide for never taking their cat to the vet include: "the cat is healthy" (54%), cost concerns (45%), and convenience/ease of access issues (8%).

Stress Around Veterinary Visits

Transporting cats to the veterinarian is a significant barrier, and one that the veterinary community is not fully addressing:

- 47% of cat caregivers who regularly visit the vet say just thinking about the appointment is stressful.
- 61% of cat caregivers who do not routinely visit the vet describe the thought as stressful.
- Only 30% of cat caregivers report receiving instructions from their veterinarian on how to make transportation less stressful, *a stark contrast to the 65% of veterinarians who believe they provide this guidance.*

"65% of veterinarians believe they provide transport guidance to reduce cat stress. Only 30% of cat caregivers say they receive it."

Information Sources for Pet Health Decisions

Veterinarians remain the most frequently consulted resource for cat health questions, but digital channels are prominent. These statistics highlight an opportunity for veterinarians to provide legitimate, high-quality on-line sources of information for cat owners.

- Veterinarian (67%) is the top source used regularly to make pet health decisions.
- Internet searches (64%) and other cat owners such as friends, family, or colleagues (57%) follow closely.
- When asked what source they used most recently for a specific health question, 44% cited internet searches and 40% cited their veterinarian.
- TikTok (15%) and YouTube (13%) are the top social media platforms used for cat health information among those who use social media for this purpose.

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Interest in Practice Offerings

Cat caregivers demonstrated high interest in a range of services that could increase engagement with veterinary care:

- 75% are interested in phone access to a practice staff member for free health/behavior questions.
- 65% are interested in a written post-visit report on their cat's health status and care recommendations for the coming year.
- 62% are interested in an annual wellness plan with monthly payment options covering physical exams, core vaccines, and basic lab work.
- 60% are interested in a practice offering separate cat and dog waiting areas.
- 57% are interested in a Cat Friendly Practice-certified clinic.

Cost Sensitivity and Financial Perceptions

Cost is a central factor in veterinary engagement and product purchasing decisions:

- 70% of cat caregivers who visited a vet said costs were usually higher than expected.
- 72% said they would take their cat to the vet more often if each visit was less expensive.
- 61% indicated they would prefer to spread veterinary costs evenly over the year.

61% of cat caregivers want payment options that spread the cost of their cat's care evenly across the year.

Conclusion and Industry Implications

The CATalyst 2024 State of the Cat Report: Wellness & Nutrition paints a clear picture: **cats represent a substantial and growing opportunity for veterinary practices and the broader animal health industry**, yet the current model of care delivery continues to fall short of its potential.

Key industry takeaways include:

- The "Well Cared For" cat population is estimated at approximately 30 million out of an estimated 65.9 million owned pet cats in the U.S. (AVMA Pet Ownership and Demographic Sourcebook, 2022), a substantial base that is not yet fully engaged with the veterinary system.
- The rate of first-year veterinary visits has declined from 83% in 2013 to 71% in 2023, suggesting a weakening of the critical initial touchpoint between new cat owners and veterinary care.
- Perception gaps, particularly around stress-reduction communication, indicate that veterinary messaging may be failing at the point of delivery, not intent.
- Cat owners are cost-sensitive but highly interested in convenience-enhancing and value-adding services such as phone consultation access, written health summaries, and monthly wellness plans.
- The strong human-feline bond, combined with significant unmet demand for education, lower-stress veterinary experiences, and more accessible care options, **represents a meaningful opportunity to increase feline engagement with veterinary care.**

"The U.S. veterinary model in 2013 was canine-centric and continues to be so today. What is different is the likely rate of change in the mix of future veterinary patient volumes given recent economic and lifestyle changes among young pet owners, which appear more favorable for cats versus dogs."

— Jim Thomas, PhD, Principal Investigator

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Practice Takeaways

Feline healthcare is entering a new era. Veterinary practices that recognize caregivers and their cats' unique needs today will be better prepared for tomorrow's opportunities. The next section highlights specific recommendations that practices can implement to elevate the care that cats receive and to meet the expectations of feline caregivers:

- Clients indicate that they want their cats seen by veterinary teams that clearly like cats. Cat friendly practices might include:
 - When scheduling cats for veterinary care, have dedicated patient care teams that are cat friendly and enthusiastic about interacting with cats.
 - All team members that interact with cats should be trained on methods that make cat visits less stressful.
 - Train team members to understand the unique needs of cats, including the cats environmental and social preferences. This training should include information so that team members can educate clients about housing needs, environmental enrichment, feline behaviors, and appropriate interactions between cat caregivers and cats.
 - Feline patient care teams should receive specific training to ensure that cats are comfortable during examinations using techniques like always having a towel on the examination room table, examining cats where they are most comfortable, having caregivers present during examinations and using respectful handling techniques.
 - Veterinary teams should be careful of the language they use to describe cat behavior, which can bias the way teams interact with cats and be negatively received by cat caregivers. For example, words like aggressive, fractious, sassy, and spicy should be replaced by more appropriate terms that describe a cat's actions in terms of its emotional state, such as protective or repelling behaviors.
- Clients want to reduce the stress their cats experience when receiving veterinary care. Ideas to consider:
 - Instructions from the veterinary practice with information about how to acclimate the cat to the carrier, what types of carriers are best and how to make cat handling and transportation less stressful.
 - Separate waiting rooms for dogs and cats. If this isn't feasible with the facility design, cats can wait in the car with their caregivers until time for their services. Alternatively, they can be placed directly into the examination room.
 - The examination room should be species specific and used only for cats. It should be cat friendly, with resting ledges and hiding boxes.
 - The practice can offer cat only days or hours

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- Cat caregivers desire education to help them better understand their cat's health care needs. Examples include:
 - Veterinarians should employ the talking physical examination¹ to increase the perceived value of the examination to the health and wellbeing of the cat.
 - Provide a written examination report about the health status of the cat and recommended care over the next year.
 - Proactive client education that emphasizes how health recommendations benefit them and their cat.
 - A simple, brief, step-by-step brochure on how to care for the cat, based on life stage, with an explanation of the importance of routine examinations
- Cat caregivers state that the costs of a routine visit are usually much higher than expected and they would like to be able to spread the price of care out evenly over the year. Strategies to meet cat caregivers needs include:
 - Proactive cat caregiver education regarding the anticipated price of care for the different life stages of the cat.
 - Wellness plans, with monthly payments
 - Chronic care bundled plans, which allow pet caregivers to spread out the cost of chronic diseases into monthly payments.
 - Financial triage tools and education
 - Pet insurance
 - Pricing transparency on the practice website, for frequently used services such as examinations, wellness diagnostics, vaccinations, spay, neuter, and dental care.

References:

1. Phillips, E., Coe, J. B., Blois, S., and Stone, E. (2025). The Talking Physical Exam: a communication tool for engaging clients during the companion animal physical exam. *Journal of the American Veterinary Medical Association* 263, 6, 1-1

Resources:

- [Cat Friendly Certificate Program](https://catvets.com/cat-friendly/certificate-program/) (<https://catvets.com/cat-friendly/certificate-program/>)
- Fear Free Certification Program (<https://www.fearfree.com/certifications/>)
- Feline VMA <https://catvets.com/>
- The indoor pet initiative (cats) (<https://indoorpet.osu.edu/cats>)

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Survey Methodology

Veterinarian Survey

M/A/R/C® Research conducted an online survey of 410 U.S. companion animal veterinarians in August 2023, in collaboration with CATalyst Council. Respondents were required to meet the following criteria:

- Spend at least 70% of their time with dogs and cats (with a minimum of 20% with cats)
- Work at least 20 hours per week
- Have graduated between 2 and 43 years prior from veterinary school
- Represent a mix of gender, geographic region, practice size, and practice type

Pet Owner Survey

M/A/R/C® Research conducted an online survey of 1,933 U.S. cat caregivers between October and November 2023. Respondents were required to:

- Be 18 years of age or older
- Own at least 1, but fewer than 10, cats in the household
- Be the primary or co-decision maker relating to pet care
- Not be employed by a veterinary practice, pharmaceutical company, pet food manufacturer, or related industry
- Represent a mix of geographic region, gender, age, and household income

The survey was split into two groups of approximately 950 respondents each. Group 1 focused on cat health and veterinary care; Group 2 focused on cat health and nutrition. The combined sample represents 3,765 cats, averaging approximately 2 cats per household. Margin of error at the 95% confidence level is $\pm 3.2\%$.

Practice Management Software (PIMS) Analysis

A longitudinal cohort analysis was completed using data from 1,250 small animal practices across three time periods, 2015, 2019, and 2022, with a corroborative analysis of an additional 7,900 practices available for 2019 and 2022. This analysis tracked patient volumes, invoice frequency, vaccination rates, and parasiticide usage over time.

Feline Medicalization Estimate

Animalytix LLC provided an analysis of feline core vaccine (HCP/RCP) sales data to estimate the U.S. population of "Well Cared For" cats, defined as those receiving vaccination on an annual, biannual, or 3-year protocol. This analysis was informed by sales data from veterinary practices, shelters, and specialty centers.

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