

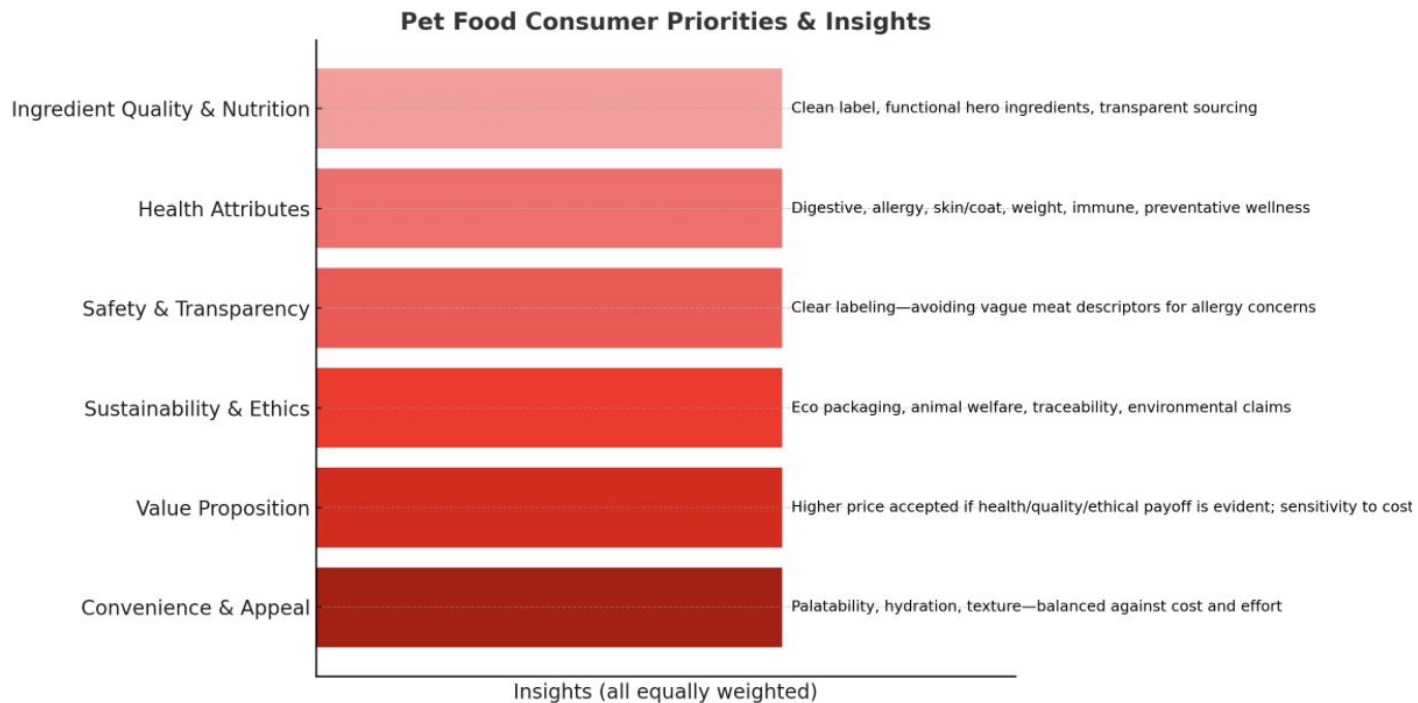
# Purina Wet Dog Food Research Draft

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# What do dog owners look for/care about in wet dog food?

When preparing to do research on Purina's performance as a wet dog food wholesaler, it was vital for us to understand what it is that consumers want in their wet dog food in order to apply it later onto our strategies.

In general, dog owners tend to prioritize the following:



This graph was created by the Market & Research Analysis GPT, after it was prompted to find and analyze its content.

All content came from the following sources, verified by Nicole:  
Sources: [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#)

# What brands do consumers think of when thinking of dog food?

## Top of Mind Awareness:

Brand	Mentions	Percentage
Purina	101	29.53
Blue Buffalo	37	10.82
Blue	24	7.02
Chewy	14	4.09
Pedigree	10	2.92

Table created using ChatGPT, using the inputs from the TOM Awareness data, and then turned into a more aesthetically appealing table using GPT5.

According to a survey, when prompted to mention the first dog food brand that comes to mind, respondents said the following:



## Industry Leaders

- Nestlé Purina PetCare is the industry leader in sales (\$MM) and market share (%) for cat and dog food, except when it comes to wet dog food.
- Mars Petcare is at a significant lead when it comes to wet dog food in both sales and market share.
  - A \$952MM difference, and a 35.4% difference.

## Dry vs Wet Pet Food Market by Brand

Brand	Dry (\$MM)	Wet (\$MM)	Dry (%)	Wet (%)
Nestlé Purina PetCare	2720.0	516.6	37.1	19.2
Mars Petcare	1873.5	1468.0	25.5	54.6
Private label	957.3	340.8	13.1	12.7
Post Consumer Brands	952.3	132.6	13.0	4.9
Blue Buffalo	609.5	191.6	8.3	7.1
All others	153.8	25.8	2.1	1.0

Table created using ChatGPT, using the existing data provided in the assignment.

# 4 C's

## Company

**Origin:** Founded in 1894; became Ralston Purina in 1902.

**Values:** Driven by "The Five Tall's": Integrity, Passion, Expertise, Performance, and Innovation.

**Market Position:** Part of a dominant duopoly with Mars; a trusted, science-backed industry leader.

**Reputation:** Known for expertise and quality; a leader in fueling champion show and sporting dogs.

**Growth:** Strong market share and well-positioned to grow with the expanding wet pet food category.

## Category

**Clichés:** Guilt-tripping ads, "fresh food" myths, and reliance on anecdotal health claims.

**Position:** A reliable, expert leader among new, flashy rivals.

**Challenges:** High cost compared to dry food and misleading marketing that creates consumer confusion.

**Market Trajectory:** Expanding due to "pet humanization" and consumer demand for premium options.

**Outdated Practices:** Misinformation and shaming around ingredients like corn and meat meal

## Consumer

**Core Problem Solved:** Provides reliable, expert-backed nutrition.

**Higher-Order Goal:** Helps pet owners become the best "pet parents," ensuring their pets live healthier, happier lives.

**Audience:** Focus on Gen Z, who view pets as family and value authenticity.

**Barriers:** Fear of being unprepared, hesitation due to confusing marketing, and the high cost.

**Perception:** Positively seen as a trusted, expert brand; negatively as a large corporation lacking a "boutique" feel.

## Culture

**Audience Fight:** Advocating for pet wellness, ingredient transparency, and the "pets as family" movement.

**Muses:** Pet-centric influencers on TikTok and Instagram who share their genuine pet parent journeys.

**Credible Fight:** Can credibly fight against misinformation and "food shaming" in the pet industry.

**Niche Communities:** Deeply embedded in the show dog and sporting communities, validating its scientific expertise.

**Cultural Challenge:** Can challenge the "natural vs. science" tension, proving that wellness and nutrition are rooted in both.

# Who is the target audience for dog food? Is GenZ a driving consumer?

The dog food market is primarily driven by three generations with active spending power: Millennials, Gen X, and Gen Z. Each group has distinct purchasing habits and priorities:

**Millennials:** This generation is a key driver of the "pet humanization" trend. They often treat their pets as children and are willing to spend more on premium products, including specialized or high-quality foods, based on a focus on ingredients and perceived health benefits.

**Gen X:** Gen X consumers tend to be more established and loyal to brands with a proven track record. They seek quality and convenience, and their purchasing decisions are often influenced by a history of positive experiences with a brand.

**Gen Z:** As the youngest generation with active spending, Gen Z is expected to be on par with Millennials in terms of workforce contribution by 2031. This generation is pragmatic and less brand-loyal than their predecessors.

Despite lacking purchasing power, Gen Z is a driving consumer for several reasons:

**Emotional Connection:** Gen Z sees pets as "close friends" or "sons," a mindset that leads them to consider the pet's needs before their own when making a decision about food.

**Focus on Wellness:** They have an expansive view of health, including physical, mental, and emotional well-being. They see nutrition as a key contributor to a pet's overall health and are concerned with issues like anxiety and stress in their pets, using eating behaviors as an indicator of mental health.

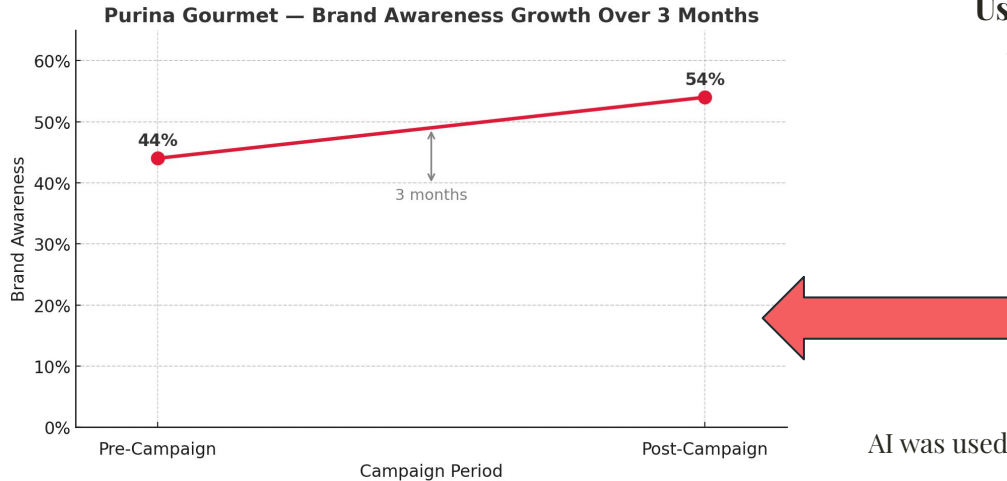
**Pragmatism and Price-Consciousness:** While they desire high-quality food, they are also pragmatic, with many facing "financial headwinds." They are more likely to be influenced by low prices and special offers compared to older generations. They are less interested in buying "the best" food and are more open to "basics". This shift means they are looking for value, function, and convenience, not just aspirational brands.

**Influence of Vets and Authenticity:** Gen Z's top source for information on pet food and health is now veterinarians, with a declining reliance on social media and news. They also expect companies to "walk the talk" on issues like animal welfare and sustainability, demanding evidence rather than just claims.

# What does Purina do correctly when advertising their other products?

We want to examine what Purina does correctly when advertising their dry dog food and other products in order to implement better strategies when advertising their wet dog food.

We have found that Purina excels in two categories when advertising:



AI was used to create the graphic showing Purina's increase in brand awareness.

## Interest-Based Advertising

- Purina engages in interest based advertising. Purina claims that their use of IBA is one of the many reasons they are so successful in their advertising.
- Ads are served to consumers after they have left their website or apps, encouraging them to return.
- These ads are relevant based on the consumer's personal browsing habits or online activities.

## Using relevant trends that connect to their product

- The Catfluencer Campaign
  - Purina implemented a campaign that features various cats that post on social media as influencers.
  - These cats promote Purina's food through engaging and "foodie" content
  - Brand awareness grew 10% and more than 3 million accounts were reached in the 2022 campaign: Gourmet Next Catfluencer Election.

# What is Purina Doing Wrong in their Advertisements for Wet Food?

Table: Wet Dog Food Advertising Weaknesses

Advertising Principle	What Might Be Missing or Underperforming	Explanation
<b>Connecting Emotional + Functional Benefits</b>	Lacks emotionally compelling storytelling; may focus too much on functionality without emotional pull.	Emotional connection (like dry ads) appears underleveraged in wet promotions.
<b>Transparency &amp; Authenticity</b>	Limited consumer-facing messaging for wet lines; recall acknowledged but not tied to brand messaging.	Needs stronger narrative around safety and ingredient integrity.
<b>Accessibility &amp; Value</b>	Product may be seen as lower priority; marketing investment seems low for wet compared to dry.	Fewer standout campaigns or premium messaging evident.
<b>Holistic Health Alignment</b>	Wet dog formulas lack clear science-based narrative or premium differentiation.	No visible campaign emphasizing advanced nutrition or natural ingredients.
<b>Animal Welfare Messaging</b>	Little explicit messaging around wet food's role in pet health, welfare, or special needs.	Wet products aren't highlighted as caring or beneficial the way dry is.
<b>Interest-Based Targeting</b>	No evidence of highly targeted online campaigns to boost wet dog food awareness or trial.	Likely underutilized in digital ad mix for wet products.

We used ChatGPT to help analyze Purina's advertising strategies for weaknesses in their wet dog food promotions. ChatGPT generated this table summarizing where Purina's wet dog food ads underperform across key principles like emotional connection, transparency, and holistic health alignment. To support the analysis, it incorporated external research and linked sources, such as sales data showing wet food represents only 4% of Purina PetCare's sales compared to 30% for dry dog food. [Source](#)

# Comparing Purina Wet Food to Dry Food Advertisements

## Dry Dog Food Advertisements

- Many campaigns, large ad spend, frequent new product launches. Dry is central to Purina's portfolio.
- Strong Messaging: quality ingredients, nutritional science, visibility of "real meat," protein content, etc.
- Campaigns that focus on pet bonding, pride, care, lifestyle. Dry adverts tap into owner's emotions.
- Authentic: "I Stand Behind Beneful" shows employees; shows facilities, ingredient sourcing. Clear claims.
- Dry food ads often include "superfood," whole ingredients, natural recipes, "weight management," etc.
- Dry food tends to be positioned for everyday meals, staple feeding, wide base. Also premium tiers with dry. Purina invests in broad reach.

## Wet Dog Food Advertisements

- Much smaller share of media attention; fewer big standout wet-dog-food-only campaigns.
- Less clarity in ingredients, less prominence of wet-specific benefits (e.g. hydration, texture).
- Ads echo or piggyback on dry food messaging, show wet as a variant instead of standalone emotional stories.
- Fewer ads prominently show internal processes, the people behind the product, or owner testimonials specific to wet food.
- Could leverage inherent strengths (moisture, palatability, digestion), but ads don't develop them.
- Mostly positioned as complementary (meals, treats, special occasions) rather than staple. May not be reaching all segments (e.g. owners who want premium wet food).

# What does Nestle Purina's primary competitor, Mars Petcare do correctly when advertising dog food?

## Mars Wet Dog Food Advertising Strengths

Principle	How They're Appealing	Execution Example
<b>Indulgence as Love</b>	Frames feeding as an emotional act, not just nutrition. Owners feel they're spoiling their dogs.	Cesar ads like "Love Them Back", gourmet plating visuals, focus on small dog pampering.
<b>Convenience &amp; Modern Packaging</b>	Makes wet food feel easy, clean, and contemporary (vs. messy cans).	Single-serve trays and pouches, variety multipacks, resealable formats.
<b>Everyday Affordability with Heart</b>	Appeals to value-conscious buyers while building trust through cause marketing.	Pedigree's "Feed the Good" and shelter adoption tie-ins, donations with purchases.
<b>Science &amp; Precision Nutrition</b>	Builds credibility with pet parents who prioritize health and vet trust.	Royal Canin breed- and condition-specific wet diets marketed via vets and clinical channels.
<b>Global Expertise, Local Relevance</b>	Uses Mars' global dominance in wet food while tailoring campaigns to local lifestyles (e.g., urban small dogs).	Cesar small dog focus in city markets; adoption campaigns aligned with local shelters.

Used ChatGPT-5 to generate Mars Petcare's top advertising principle, the impact they have on the consumer, examples of such, and to combine it all into a table.

## Focus

Mars shows their strength through having several pet food brands that treat wet food as a primary product, rather than an afterthought.

## Strength

They are able to comfortably balance emotional love (Cesar), social good (Pedigree), and evidence-based trust (Royal Canin). On top of that, the packaging they provide is very modern and convenient.



# Research Findings and What to Focus on Going Forward

## What We Found

**Consumer Priorities:** Owners want their wet food to be healthy, convenient, and trustworthy.

**Purina's Strengths:** Strong emotional advertising in dry food, frequent campaigns, authenticity, clear nutritional claims.

**Purina's Weaknesses in Wet:** Few wet-only campaigns, weaker clarity on wet-specific benefits (hydration, palatability), positioned more as “complementary” than essential.

**Competitive Advantage (Mars):** Strong brand segmentation (Cesar = indulgence, Pedigree = social good, Royal Canin = science), modern packaging (pouches, trays), and consistent emotional storytelling

## What We Want to Research Next

**Packaging Impact:** How much do consumers value trays/pouches vs. cans in purchase decisions?

**Emotional Storytelling:** Which specific messages resonate most with Gen Z buyers in wet food?

**Competitive Playbook:** Deeper dive into Mars' most effective wet campaigns, as well as Pedigree's most effective dry campaigns, to better understand Mars and see how Pedigree can better leverage their strengths

**Growth Opportunities:** Identify untapped wet food benefits (hydration, digestion, texture) Purina can own in advertising.

**Channel Strategy:** Where should Purina invest more—TV, social media, retail displays, or vet endorsements?

# AI Usage & Sources

## How did AI (ChatGPT) assist us and make the research easier?

- Provided help with finding out what to look for, how to research
- Analyzing the datasets for TOM and brand thoughts, creating appropriate graphs
- Helped analyze data and come to conclusions
- Found multiple credible sources in a matter of seconds
- Found old Purina and cat and dog food ads with ease for us to compare
- Compiled all information from multiple sources into tables that are easy to consume
- Provided apt summaries and application of found information
- Helped generate visualizations for information and research

## Sources Used

[1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#), [9](#), [10](#), [11](#), [12](#), [13](#)