










**EXECUTIVE INSIGHTS**

# Beyond Dogs and Cats: Exploring Growth in Other Backyard Animals and Wildlife

## Introduction

Companion pets (dogs and cats) have long dominated animal industry conversations. However, other companion animals (small animals), backyard animals, including chickens and horses, and wildlife hobbies like bird watching or feeding are gaining increased attention. These animals and associated activities represent a growing segment of the broader pet and animal market and population, reflected in increased spending and strong enthusiasm from consumers. Millions of households are already participating in these categories, bringing a notable shift in pet ownership trends (see Figure 1).

**Figure 1**  
US pet population – APPA 2024 National Pet Owners Survey

	Backyard animals				Companion animals		Other animals
							
	Backyard chickens	Wild birds (feeding)	Horses	Goats/ other livestock	Dogs	Cats	Small animals
<b>Number of U.S. households with animals</b>	<b>17M</b>	<b>14M</b>	<b>2M</b>	<b>&lt;0.5M</b>	<b>58M</b>	<b>40M</b>	<b>5M</b>

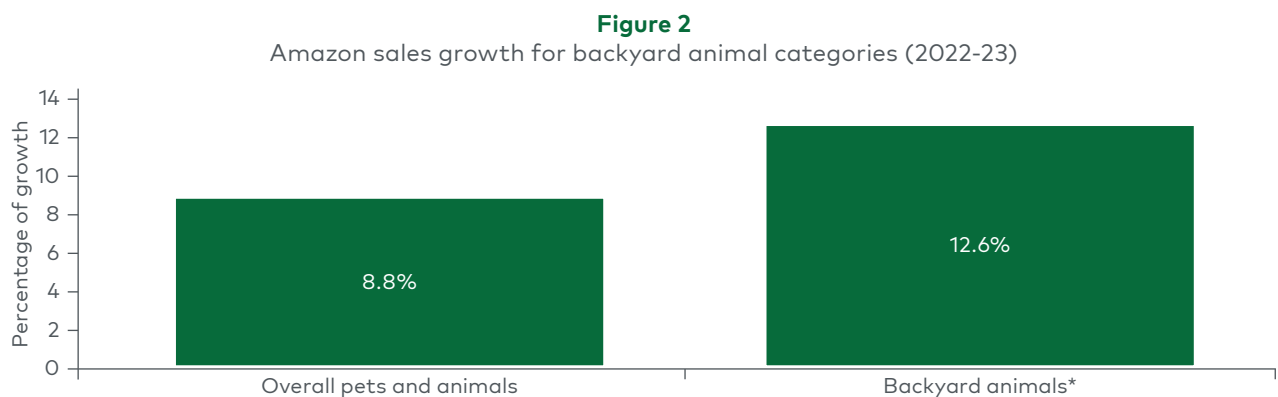
Source: American Pet Products Association 2024 National Pet Owners Survey; L.E.K. research and analysis

This edition of L.E.K. Consulting's *Executive Insights*, in partnership with William Blair, looks at the growing importance of "other" backyard animals, examining key market drivers, consumer behavior shifts, and emerging opportunities for retailers and brands.

To contextualize the significance of backyard animals, consider the following:

- Approximately 17 million U.S. households raise backyard chickens, representing 13% of all pet owners.
- Nearly 14 million households make intentional efforts to feed wild birds, showcasing the widespread interest in backyard wildlife.
- Ownership of horses and other livestock is less prevalent, but these categories still account for millions of households across the U.S.
- Approximately one-third of pet-owning households own a pet other than a dog or cat (e.g., rabbits, hamsters, reptiles or fish).

Interestingly, the spending growth on backyard animals has outpaced the overall pet market. Amazon reports an approximately 13% year-over-year (YoY) increase in backyard animal categories from 2022 to 2023, as compared to nearly 9% growth for the broader pet and animal categories (see Figure 2).



\*Includes spend on backyard birding and wildlife, equestrian equipment, and livestock supplies categories  
Source: Stackline; L.E.K. research and analysis

The strong momentum seen in backyard animals is not limited to recent history. As an indicator of historical growth, the APPA estimated in their 2021-22 National Pet Ownership Survey that ownership of backyard chickens increased significantly from 8% in 2018 to 13% in 2020.

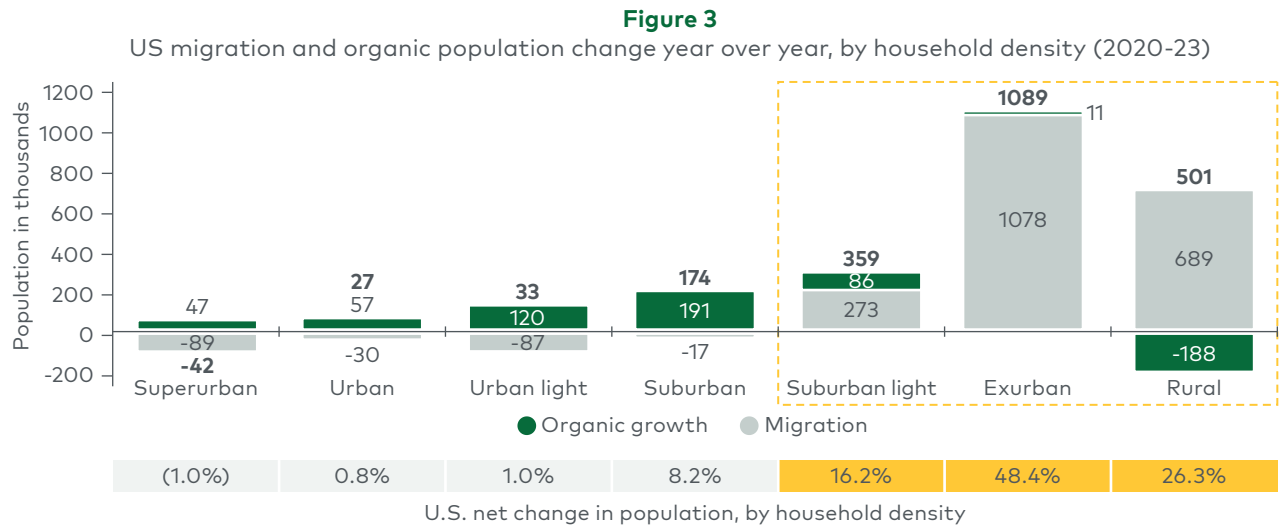
Furthermore, the same survey showed that chicken ownership is most popular among millennials (22%), followed by Gen Z (19%), which supports a favorable trajectory for the category going forward.

### Key drivers of the backyard animal market

Factors contributing to the rise in backyard animal ownership and hobby participation and the associated market growth include migration trends and evolving interests in multiple aspects of outdoor living and self-sufficiency. The following sections explore these drivers in detail.

### Urban exodus post-COVID-19

The ongoing migration away from urban areas since the COVID-19 pandemic significantly influences backyard animal ownership. Millions of Americans have moved to suburban, exurban and rural areas, creating an environment conducive to owning backyard animals. Between 2020 and 2023, more than 2 million people relocated to less-densely populated areas, while urban centers experienced a net loss of residents (see Figure 3).



Source: Census data analysis; L.E.K. research and analysis




This migration is expected to continue, as seen in the U.S. Census Bureau data showing that half of the fastest-growing areas in 2023 were located more than 20 miles outside a major city. This translates to more people living in homes with backyards, increasing the potential for backyard animal ownership. Past surveys reveal the most common reason for not owning backyard animals is a lack of outdoor space — a barrier that is becoming less relevant as more people move to homes with larger lots and yards.

### Changing consumer attitudes toward the outdoors

In parallel with this migration, consumer attitudes have shifted. There is a growing movement toward outdoor hobbies, including gardening, farming and wildlife activities. Spending on gardening and lawn care has grown at an average of 8% per year from 2018 to 2023, demonstrating strong consumer interest in cultivating outdoor spaces.

Participation in hobby farming has increased as well. Spending on livestock supplies rose by 8% in 2023 alone. As consumers seek greater engagement with nature and sustainable living, raising backyard animals offers a way to integrate these values into their everyday lives (see Figure 4).

**Figure 4**  
Consumer attitudes toward the outdoors

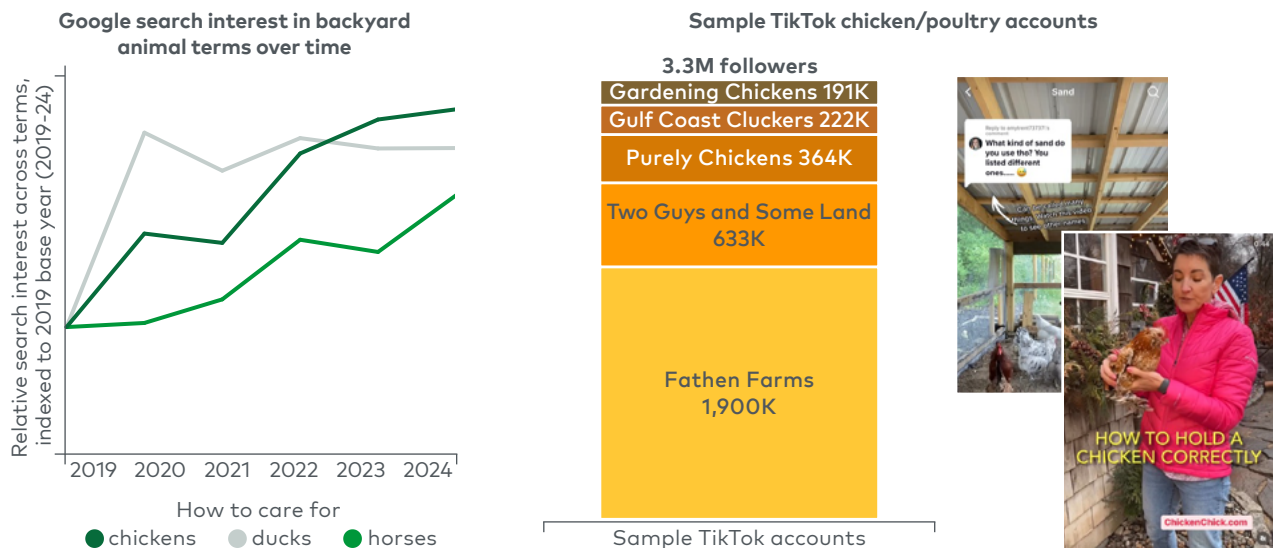
	CAGR 2018-23	CAGR 2022-23
 Spend on gardening and lawn care	8%	7%
 Spend on seed to feed wild birds	11%	6%
 Spend on livestock supplies on Amazon	12%	8%

Note: CAGR=compound annual growth rate  
Source: L.E.K. research and analysis

### Growing interest in backyard animal ownership

Since 2019, search trends and social media activity have reflected surging interest in ownership of backyard animals, as seen in Google searches for terms related to this topic. Google search interest for “How to care for chickens” has grown by 87.5% over the past five years, highlighting a steady rise in consumer curiosity. Platforms like Instagram and TikTok are seeing increased engagement with educational content that focuses on caring for chickens, horses and other backyard animals (see Figure 5). For instance, top backyard chicken influencers on Instagram have follower counts ranging from approximately 15,000 to over 123,000, indicating a substantial and engaged audience. Additionally, some TikTok accounts, such as “Fathen Farms,” have amassed 1.9 million followers, demonstrating a broad and engaged audience.

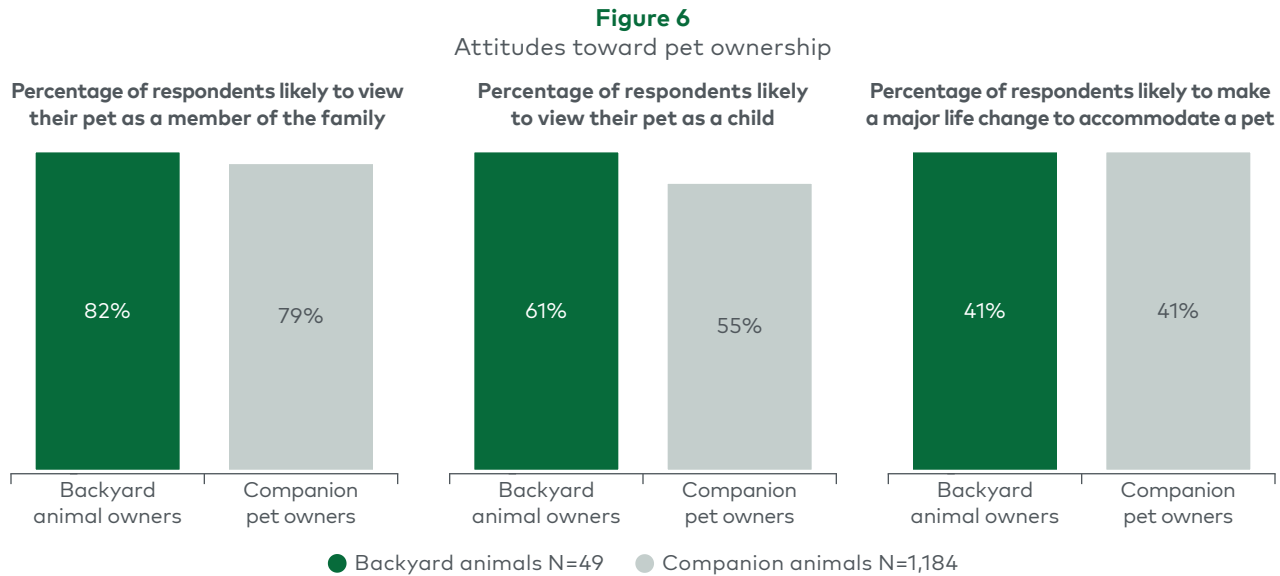
**Figure 5**  
Backyard animal social media accounts



Source: Google Trends; social media websites; L.E.K. research and analysis

Our April 2024 survey suggests that approximately 10% of non-backyard animal owners and hobby participants are considering joining the market within the next five years, which means an

additional 13 million to 14 million households could join the market in the near future, presenting a substantial growth opportunity for retailers and brands.



Source: L.E.K. Pet Survey (2023)

### Backyard animal owner profile

Backyard animal owners differ from traditional companion pet owners in some ways. Current owners are more likely to be female and tend to be younger; 52% of backyard animal owners are younger than 45, compared to 48% of companion pet owners. They also live in homes with more space: 95% of backyard animal owners have access to a backyard, compared to 81% of those with companion pets.

Despite these differences, similarities exist between backyard animal owners and pet owners when it comes to enthusiasm. Although backyard animal owners may not have day-to-day interaction with their animals, they often are very passionate about them (see Figure 6).

This passion drives high spending on supplies and care for backyard animals, creating a lucrative market for products catering to this demographic. Furthermore, many backyard animal owners expect a return for their efforts — for example, in eggs from laying chickens and in meat from meat birds.

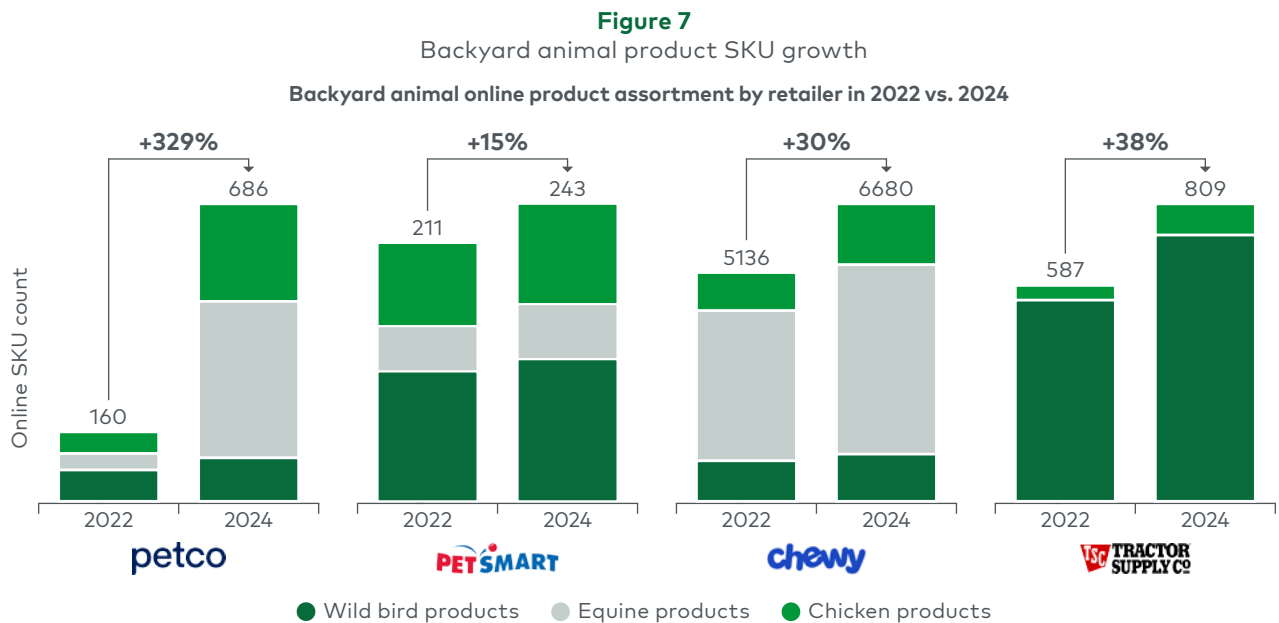
Looking at future backyard animal owners, we find that they are generally younger and wealthier than the current market participants; 66% of potential future owners are younger than 45, and 42% have a household income exceeding \$100,000. These characteristics suggest that the market for backyard animals will continue to grow as these wealthier and more enthusiastic consumers enter the space.

It is well-understood that the humanization of dogs and cats has spurred innovation and increased spending in those categories, especially on premium products that promote overall pet wellbeing. There is emerging evidence that this trend is occurring in other animal segments as well. For example, companies are now offering specialized diets and health products for small animals such as rabbits, guinea pigs, and hamsters. Brands like Oxbow Animal Health have launched high-fiber hay blends and natural supplements designed to meet the specific nutritional needs of these pets. Additionally, products like Kaytee's Forti-Diet Pro Health food and Vitakraft's Slims treats are gaining popularity on platforms like Amazon, reflecting a growing consumer demand for premium small pet products.

### Retail and brand opportunities

Retailers and brands have already begun to capitalize on the growing backyard animal market, expanding product assortments and launching new offerings to meet consumer demand.

Major pet retailers like Petco, PetSmart, Chewy and Tractor Supply have increased their backyard animal product offerings by 15%-40% since 2022, with some segments seeing even greater growth. Petco's assortment of chicken and poultry products has grown by over 300% in the past two years, reflecting the surging interest in backyard poultry (see Figure 7).



Note: SKU=stock-keeping unit  
Source: Company websites; L.E.K. research and analysis

Tractor Supply, in particular, has seen strong sales growth tied to its "Chick Days," with more than 11 million chicks sold in 2023, up from 7.5 million in 2019, representing a compound annual growth rate of 10% over the period.

Brands are also recognizing the value of the backyard animal market and are expanding their portfolios to include products tailored to this audience. For example:

- **Compana**, a leading portfolio of brands including MannaPro, Flock Party, Oxbow, Smallworld, Calf Manna, Corona and ZuPreem offers a wide variety of feed, treats, supplements, supplies and nutrition products for backyard chickens, horses, goats, sheep, birds and small animals.
- **Kalmbach Feeds** provides high-quality feed for poultry, horses and small animals.
- **Producer's Pride**, a Tractor Supply brand, focuses on providing affordable feed and supplies for backyard poultry and livestock.

Some companies have entered the backyard animal market through mergers and acquisitions, broadening their product offerings to include care and wellness products.

- **Kaytee (Central Garden & Pet brand)** has expanded from products for small animals and birds to include offerings for backyard chickens
- **Nestle (Purina)** now offers feed products for backyard poultry and other animals, such as Purina Flock Raiser, Purina poultry supplements, Purina Omolene, and Purina Goat Chow
- **Nutrena (Land O'Lakes brand)** has strengthened its position in the animal feed market through acquisitions of regional feed companies specializing in livestock and poultry.

Smaller brands continue to drive new innovations across various segments, underscoring the dynamism and growth potential within this space.

## Conclusion

The market for "other" animals represents a rapidly growing and increasingly important segment of U.S. households. This includes not only backyard animals but also small mammals, reptiles, birds and exotic pets. The growing enthusiasm, coupled with favorable demographic shifts, presents a promising future for businesses that choose to invest in this space. As consumers continue to migrate to suburban and rural areas, embrace outdoor activities, and show greater interest in sustainable living, the demand for backyard animals is set to rise.

Retailers and brands that recognize the potential in this market can capitalize on the opportunity by expanding their product offerings, catering to the unique needs of backyard animal owners and tapping into the strong consumer passion driving this trend.

For more information, please [contact us](#).

## About the Authors



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Lauren DeVestern is a Managing Director and Partner in L.E.K. Consulting's Boston office and a member of the retail & Consumer practice. A thought leader on pet industry dynamics, Lauren leads L.E.K.'s Pet & Animal practice, advising industry clients on issues ranging from growth and channel/go-to-market strategy to brand positioning and M&A support, including due diligence and portfolio value enhancement. She has published numerous articles in the pet care sector and frequently participates in industry events and webinars. Lauren also has extensive experience in beauty and personal care, apparel and footwear, and health and wellness.



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## About L.E.K. Consulting

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