

Animal Health Alliance
SOLUTIONS FOR THE FUTURE

PET OWNERSHIP IN AUSTRALIA

SUMMARY **2013**

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1 Introduction

Pet Ownership in Australia 2013 has been prepared by the Animal Health Alliance (Australia) and is based on the findings of one of the most comprehensive surveys of pet ownership undertaken in Australia. It provides an insight into pet ownership trends and buying behaviour, and outlines the value of the Australian pet care industry to the Australian economy.

This survey will be repeated every three years, with the findings published in future editions of the *Pet Ownership in Australia* report.

This summary provides high level findings and an overview of the information available in the full report.





2 Overview

Australia has a strong history of pet ownership, with pets playing an important role in the lives of Australians for generations. Today there are more pets living in Australia than people, confirming their importance in modern Australian society.

The Australian pet industry is estimated to be worth \$8.0 billion annually.

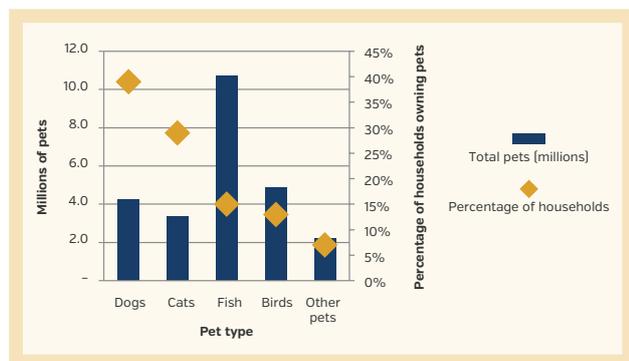
The full report includes:

- Detailed breakdown of the value of the pet care sector
- International comparison on pet ownership rates and market value
- Detailed analysis on:
 - Reasons for pet ownership
 - Roles that pets play in the lives of Australians
 - Barriers to pet ownership
 - Plans for new pet ownership in the next 12 months
- Insights into the buying behaviour of pet owners
- Total and average expenditure on a range of different pet product and service categories



3 Pet population

Figure 1: Australian pet population and ownership rates



In 2013 there are estimated to be more than 25 million pets in Australia, with nearly 5 million of Australia’s 7.6 million households home to pets. At 63%, Australia has one of the highest rates of pet ownership in the world.

Dogs are the most common pet, with 39% of households owning a dog. There are estimated to be 4.2 million pet dogs in Australia; 19 dogs for every 100 people.

Cats are the second most common pet, with 29% of households owning a cat. There are estimated to be 3.3 million pet cats in Australia; 15 cats for every 100 people.

More than 1.1 million Australian households [14.9%] are planning to get a pet in the next 12 months.

The full report includes:

- Demographic analysis of pet ownership, including national and state comparisons
- Pet ownership trends including:
 - Adoption
 - Micro-chipping
 - De-sexing
 - Whether pets are kept indoors or outdoors
 - Outings and holidays
 - Online purchasing of products and services

4 Pet food

Pet owners are estimated to spend over \$3 billion a year on pet food. Together, dog and cat food represent almost 90% of all pet food expenditure.

Pet food has been compared to baby food in terms of its resilient market performance, with people prioritising spending on their pets as they would a member of their immediate family.

Dog food accounts for over half of all pet food sold.

The full report includes:

- Sales of dog and cat food by value and volume
- Trends in pet food – how the market is segmented, size of private label sales etc.
- Breakdown of pet food expenditure data across different:
 - Pet types – dogs, cats, birds, fish and other pets
 - Categories for dog and cat food – dry, wet, and treats and mixers
 - Price points for dog and cat food – economy, mid-priced, premium, and treats and mixers
 - Channels where dog, cat, bird and fish food are purchased – supermarkets, pet stores etc.
- The split between prepared and non-prepared dog and cat food
- Trends driving buying behaviour
- Online purchases of pet food



5 Pet products and accessories

The value of the pet product and accessory market is estimated to be worth over \$1.6 billion. This is split between healthcare products (including medicines), and other products and accessories such as collars, leads, food bowls, toys and litter trays.

Advances in pet healthcare products technology have enabled pet owners to protect their pets from fleas, ticks and internal parasites. Over recent decades this has seen the domain of dogs and cats move from outside to inside the home.

Over half of all expenditure on products and accessories is for dogs.

The dominant channel for purchasing pet products is supermarkets (44%), followed by pet shops or specialty stores (39%).

The full report includes:

- Total and average expenditure on healthcare products by pet type
- Total and average expenditure on other products and accessories by pet type
- Breakdown of the channels for buying products and accessories
- Trends in pet healthcare
- Insight into the range of healthcare product categories
- Ex-manufacturer sales of different healthcare product categories over the past three years

6 Veterinary services

Veterinarians are considered to be the most important source of information about companion animals, therefore fulfilling an important education role for pet owners.

Pet owners are currently estimated to spend \$1.7 billion on veterinary services a year.

The full report provides:

- Breakdown of the total and average expenditure on veterinary services for different pet types
- A demographic breakdown of expenditure patterns on veterinary services
- What pet owners consider the role of veterinarians to be
- Frequency of veterinary visits
- Proportion of pet food and other products purchased through veterinary practices.
- Insights into the reasons for veterinary visits for dogs and cats



7 Pet care services

Expenditure on other pet care services is estimated to total \$1.2 billion a year. More than 70% of expenditure on pet care services is for dogs.

The range of services available to pet owners is increasing and includes clipping and grooming, boarding and minding, pet insurance, training and behaviour therapy, transport and walking services.

Pet insurance is growing in popularity with pet owners.

The full report provides:

- The total and average expenditure on different services for dogs and cats
- An analysis of the services offered for dogs and cats
- Demographic insights on the pet owners utilising these services

8 The human-companion animal bond

The range of benefits that pets provide their owners is well established. Beyond companionship, enabling social interaction and general health benefits, research into the human-animal bond provides greater insight into the value of companion animals to those in socially isolating environments, suffering poor mental or physical health and as part of specialised educational or therapy programs for any age group.

The full report explores the significance of the human-companion animal bond and the range of benefits of pet ownership.

Visit the Pets in Australia website for more information or to purchase the full report, Pet Ownership in Australia 2013.
www.petsinaustralia.com.au



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