**Animal Medicines Australia**
The voice of the animal health industry

# Pets in Australia:
## A national survey of pets and people

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Our offices span all major Australian capital cities. We are a member of the Association of Market & Social Research Organisations and are accredited to the international quality assurance standard ISO 20252.

Animal Medicines Australia (AMA) is the peak body representing the leading animal health companies in Australia.

Our members include those who develop, formulate, register and manufacture veterinary medicine products aimed at managing the health of our pets, livestock and horses.

As part of our role, AMA provides up-to-date data and information on trends to inform decision-making and policy development. This report is part of that work, and forms the third in a series of reports published every three years.

## Our Members


## Acknowledgements

Animal Medicines Australia thanks the Pet Food Industry Association of Australia (PFIAA) for its contribution to this report.

# Message from the president

Our pets play multiple, varied and important roles in our lives. They are companions for relaxation, for physical activity or for teaching our children responsibility. They provide humour, fun and a sense of purpose. As assistance animals they help visually impaired people maintain independent, fulfilling lives and assist the ill and elderly manage anxiety and pain. Companion animals also play an important role in treatment of mental health, particularly for returned soldiers and first responders. Assistance dogs provide support and help to rebuild trust and connections with family and the wider community.

Understanding all the ways that our pets contribute to Australian society is complex.

This report outlines key findings from a Newgate Research quantitative study of Australian households and the state of pet ownership in 2019. It also draws on information from experts in the pet-care industry to provide a comprehensive view of pet ownership in Australia today and over the past three years.

Through this report, we can better understand the role pets play in modern Australian society, both in terms of the value people place on their pets and the value they deliver to us. The report provides a comprehensive dataset to help demonstrate that pets provide benefits to their owners on an individual level, however when considering public policy for companion animals, we must also consider the positive contribution of pets to the broader community.

Identifying who owns pets and what type they own or aspire to own, gives us unique insights into:

- the breadth and diversity of the pet population, by animal type and primary role played within households;
- the drivers and barriers to pet ownership;
- reasons for pet purchase and attitudes towards pets, with insights into the human-companion animal bond;
- pet health and management, including incidences of de-sexing, adoption, microchipping and pet insurance, as well as veterinary services and information sources; and
- estimated expenditure on pet-related purchases, by product and service type, and purchase channels.

Understanding more about our pet populations means we can better advise governments, industry and others about the beneficial role pets play in our community and how that can be enhanced.

**Andrew Mason**
President

**Animal Medicines Australia**

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## Notes to the reader

This study was conducted online among a representative sample of Australian adults. Questionnaires from previous surveys in 2013 and 2016 were modified to address emerging issues for Animal Medicines Australia and its stakeholders, and to ensure a fuller representation of all age groups and states/territories across Australia.

Percentages presented in charts and tables throughout this report may not add up to 100% due to rounding on single response questions, or because the question allowed multiple responses. Percentages included in commentary are not presented as full data sets, but rather represent only those results which are statistically significant at the best-practice 95% confidence level and are relevant to the objectives of this report.

The base (number and type of respondents) and the actual survey questions are shown underneath the charts and tables. This is typically expressed as "Base: year: type of respondent, n=count of respondents". The results throughout the report are weighted to reflect population characteristics and enhance data accuracy.

Any statistically significant differences reported are at the 95% confidence level and noted using arrows (↑↓) or different font colours (**blue** meaning significantly lower than other groups, **pink** meaning significantly higher than other groups). While some differences may appear significant, they may not be considered statistically reliable due to small sample sizes.

## Technical notes

The primary quantitative research conducted by Newgate Research to inform this report was administered online from 9-20 February 2019 by accredited fieldwork agency Lightspeed, using participants drawn from professional research panels. Quotas were set using population data from the ABS Census 2016 by place of residence, as well as gender interlocked with age.

The sample size was n=2,013, which has a maximum error margin of +/-2.2% at the 95% confidence level. To correct for sampling bias, the data set was weighted using 2016 ABS Census data. Given most findings were related to household characteristics, weights were applied by household location interlocked with household size. For findings relating specifically to individual attitudes and behaviours weights were applied by place of residence, as well as gender interlocked with age.

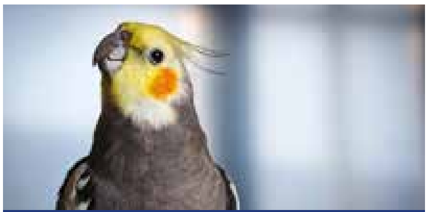
Most results for dogs and cats have been re-based on the total number of animals rather than the number of participants who own a dog or cat. These results have been weighted by household data from the ABS Census, as previously outlined. Findings relating to dog and cat breeds were based on verbatim responses, corrected for misspellings; synonyms have been retained as entered by participants. Similarly, variant spellings for cat and dog names have been taken as given.

Extrapolations by total households or persons have been based on the ABS *Household and Family Projections* (cat. no. 3236.0) and *Australian Demographic Statistics* (cat. no. 3101.0) – placing the estimated number of households nationally at 9,648,665 under a medium-growth scenario, the total population at 25,015,825, and the number of adults at 19,427,762. Note these are estimates only and should not be considered definitive quantification of total pet populations or sales data.

Note there may be slight variances in some previously published results from earlier research due to refined weighting methodology. Where numerical responses were entered directly, averages have been derived as given; where participants have selected from a pre-defined list of ranges, averages have been derived by taking the mid-point of each range along with the absolute upper bound.

This research was conducted in accordance with the international quality standard for market and social research (ISO 20252).

# Top Insights



**Almost two-thirds of Australian households have a pet today, and 90% of us have had a pet at some time**.

If the 2019 survey results were extrapolated across all Australian households, this would mean there are more pets than people in Australia.

This includes an estimated 5.1 million dogs, 3.8 million cats, 11.3 million fish, 5.6 million birds, 614,000 small mammals, 364,000 reptiles and 1.8 million ‘other’ pets.

**The positives of having a pet far outweigh the negatives.**

Almost 90% of pet owners say their pets have a very positive impact on their lives, compared to only 3% who say that impact is negative.

The key benefits cited are love, affection and companionship; while the main perceived downside is organising care when away from home.

**Having a home or lifestyle that is not suitable is the main barrier to pet ownership in Australia.**

Around two-thirds of households without a pet would like one but are unable to due to barriers imposed by landlords, strata or body corporate rules, or their concerns about ongoing responsibility and cost.

**The popularity of pure-breed dogs has declined since 2016** - from 52% of all dogs to 40%, offset by the rising popularity of mixed breeds (up 6% to 46%) and designer breeds (up from 8% to 14%).

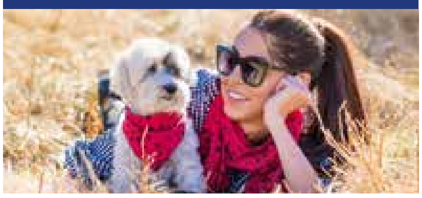
The most popular pure breeds are Labrador Retrievers, Border Collies, German Shepherds, Staffordshire Bull Terriers, Chihuahuas and Golden Retrievers.

The most popular designer breeds are ‘malshis’ (Maltese crossed with Shih Tzu) and ‘cavoodles’ (Cavalier King Charles Spaniel crossed with Poodles).

**Dog and cat owners tend to regard their pets as ‘fur babies’.**

Over 60% of dog and cat owners refer to their pet as a member of the family and most spend an average of 3-4 hours with their pets every day.

Around half of all dog and cat owners allow their pets to share their beds, and more than 25% take their pets on holidays or road trips.



**Perceptions of the costs of pet ownership aren’t always accurate, and it seems that once we have a pet the benefits outweigh the financial burden.**

More than half of those who don’t already own a pet are worried about the ongoing costs of pet ownership.

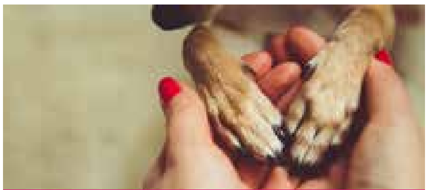
However, among those who already have a pet, less than a quarter share that concern – despite spending an estimated $1 billion more now than three years ago on keeping their pets happy and healthy.

**Women and families with children are the most likely to have a pet.**

The average pet-loving household has four or more people, is located in a rural or regional area and has a mortgage on a free-standing home.

Couple and singles without children who rent in urban areas are the least likely to have a pet.

Dog owners are more likely to be living in the ACT, while South Australians are more likely to have cats.

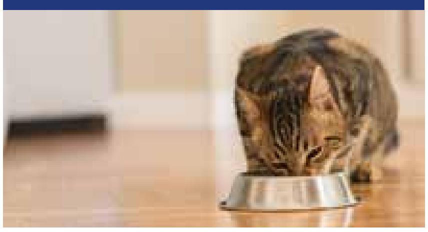


**Many pet owners have adopted ‘pet parenting’ behaviours that mimic traditional parent-child relationships.** Around two-thirds speak to their pets as though they understand the words.

These pets also often given ‘human’ names with Max, Charlie and Bella among the most popular names for dogs, and Chloe, Bella and Felix among the most popular cat names.

**While 28% of dog owners and 48% of cat owners pay nothing up front for their pets, those who do purchase their pets are paying significantly more than they did three years ago, and it’s a rising trend.**

Almost a third of dogs under the age of two cost their owner more than $1,000, with the average cost of a dog estimated to have increased by almost $100 since 2016 – to $627.



# 1.

# Pet ownership in Australia

**There are almost 29 million pets in Australia today - more than the estimated human population of 25 million.**

Three in five Australian households - or 5.9 million in total - have a pet.

61% of Australian households have a pet today.

90% of Australian households have had a pet at some time.

Pet ownership rates are higher in Australia than many other countries around the world. The latest available statistics from the United States, for example, indicate that only 57% of American households have pets[1], while only 40% of households in the United Kingdom are estimated to have pets[2].

## Ownership rates and trends

Around 40% of Australian households include at least one dog, making them the most popular type of pets. This is followed by cats (27%), fish (11%), birds (9%), small mammals (3%) and reptiles (2%) - with another 2% of households reporting that they have pets such as horses, goats, cows, alpacas and hermit crabs. The proportion of households with each type of pet has largely held steady since 2016, though there has been a notable decrease in the proportion of households that keep birds (from 11% in 2016 to 9%).

The average number of dogs and cats owned per household has remained relatively steady in recent years - while the average number of fish, birds and small mammals has increased, and the average number of reptiles has fallen. If the 2019 survey results were extrapolated across all Australian households, this would represent an estimated total of 5.1 million dogs, 3.8 million cats, 11.3 million fish, 5.6 million birds, 614,000 small mammals, 364,000 reptiles and 1.8 million 'other' pets.

Many of us have more than one pet, and 22% of all households have more than one *type* of pet. In total, 90% of all Australian households have experienced pet ownership at some point. This includes 75% of households currently without a pet.

| Pet ownership in Australia 2019 | Household penetration (%) | Total owner Households ('000) | Animals per household (ave.) | Total pet Animals (000) |
|---|---|---|---|---|
| Dogs | 39.9 | 3,848.2 | 1.3 | 5,104.7 |
| Cats | 27.0 | 2,602.4 | 1.4 | 3,766.6 |
| Fish | 11.0 | 1,056.8 | 10.7 | 11,331.7 |
| Birds | 9.0 | 867.9 | 6.4 | 5,569.4 |
| Small mammals | 2.7 | 257.8 | 2.4 | 614.5 |
| Reptiles | 2.0 | 194.5 | 1.9 | 364.2 |
| Other pets | 2.0 | 194.8 | 9.2 | 1,785.3 |
| **Pet Owners** | **61.0** | **5.9 m** | | **28.5 m** |
| **Non-Owners** | **38.9** | **3.7 m** | | |

*QA7. Which of these pets, if any, do you have in your household? QA8. How many pets do you own? Base: All participants (n=2,013). Extrapolations based on survey data and ABS population and household estimates. See technical notes for further information.*

[1] American Veterinary Medical Association, *Pet Ownership and Demographics Sourcebook 2017-18*
[2] Pet Food Manufacturers Association, *Pet Population 2019*

# Dogs

Dogs continue to be Australia's most popular pets, with just over 5 million dogs across the nation.

Forty per cent of Australian households have at least one dog (largely unchanged since 2016, at 38%). The average number of dogs per dog-owning household has also remained relatively steady at 1.3. Delving deeper, there has been a shift towards single-dog households (led by a skew towards smaller dwelling types and inner-city areas) - with 75% of those with a dog now having only one (up from 69% of all dog-owning households in 2016).

Across Australia, 62% of households have had a dog at some point, including 56% of those that don't currently have any pets.

## Dogs in detail

While pure breeds remain popular, mixed breeds are now the most common type of dog in Australia, with the prevalence of designer breeds almost doubling in just three years.

**Pure breeds:** The popularity of pure-breed dogs has declined since 2016 - from 52% of all dogs to 40%, offset by the increased popularity of designer breeds and mixed breeds (often rescue dogs). Common breeds named by dog owners include Labrador Retrievers, Border Collies, German Shepherds, Staffordshire Bull Terriers, Chihuahuas and Golden Retrievers.

Not surprisingly, purebred dogs are more likely to have been purchased from a breeder (59% vs. 20% of other dogs) – and to live in households with incomes of more than $100,000 (47% vs. 35% of households on lower incomes).

While companionship is the number one reason for getting pure breeds (43%, on par with 42% for all dogs), they were also more likely than other dogs to have been chosen for their temperament (11% vs. 3%) and for breeding (2% vs. 0%); indeed, they are less likely to have been de-sexed (only 75% vs. 85%). Purebred dogs were more likely to have seen a vet in the past year (89% vs. 81%) and also more likely to have had multiple visits (56% vs. 44%) – though their reasons for visit (e.g. check-ups, vaccinations, illness) did not differ significantly from other dogs.

**Most popular pure breed dogs**


*QD2. What type of dog is [name]? Base: (n=384 dogs).*

Purebred dogs appear to enjoy a pampered life: They are significantly more likely than other dogs to be taken to beaches, parks and other public spaces (66% vs. 60%); to visit family and friends (54% vs. 43%); on holidays (30% vs. 22%); and out shopping (12% vs. 6%).

*NB: Results relating to dogs throughout this report are largely based on a sample of n=806 dog owners, representing a maximum error margin of +/-3.5% at the 95% confidence level.*

**Mixed breeds:** Mixed-breed dogs are now the most common type of dog in Australia, up from 40% in 2016 to 46%. Based on our sample of n=460 mixed-breed dogs, these dogs are most likely to include some mix of Kelpie, Maltese, Jack Russell, Staffordshire Bull Terrier, Cattle Dog, Shih Tzu and/or Labrador Retriever – with many owners also unsure of the exact breeds. These dogs are much more likely to have been obtained from family/friends/neighbours (27% vs. 16% of other dogs) or shelters (25% vs. 9%) – as well as inherited from others (6% vs. 3%) and found as strays (3% vs. 1%).

Indeed, many of these dogs were obtained for free (38% vs. 19%) or less than $200 (24% vs. 10%), and their owners are much more likely to say the reason they got the dog was to give them a home (17% vs. 7%) or that the dog was given to them (8% vs. 4%). While companionship remains the most common reason for getting these dogs (39%, on par with 42% for all dogs), their owners are less likely - in relative terms - to consider them members of the family (57% vs. 68% of other breeds) instead of mere animal companions (27% vs. 19%).

Mixed-breed dogs are more likely to be owned by those living in regional or rural areas (58% vs. 40% of metropolitan households). They are also more likely to be kept only outdoors (19% vs. 13%), as well as kept only at home (16% vs. 9%). They are less likely to have been seen by a vet in the past year (80% vs. 87%), and their owners were more likely to say they have spent nothing or virtually nothing on most dog-related products and services.

**Designer breeds:** Regarded by some as a variation on mixed breeds, deliberate or designer breeds now account for 14% of all dogs, up from 8% three years ago. The most popular of these are 'malshis' (Maltese crossed with Shih Tzu) and several varieties of Poodle crosses – 'cavoodles' (Cavalier King Charles Spaniel) in particular, along with 'maltipoos' (Maltese), 'labradoodles' (Labrador Retriever), 'cockapoos' (Cocker Spaniel) and 'groodles' (Golden Retriever). Designer breeds are more likely to be smaller (55% weigh less than 10kg, compared to 42% of other dogs) ; indeed, there are indications that Miniature Poodles are popular mixes for many of these breeds.

**Most popular breeds used to create designer dogs**


*QD2. What type of dog is [name]? Base: (n=99 dogs).*

Companionship is again the main reason for getting these dogs (45%, on par with 42% for all dogs), though their owners were also more likely to have chosen them for their low-shedding coats (6% vs. 1%), hence the prevalence of poodle mixes. Designer breeds are more likely than other dogs to be allowed to roam freely indoors and outdoors (79% vs. 71%), and are also more likely to be microchipped (91% vs. 85%).

Insurance rates did not differ markedly by dog breed. However, when evaluating the reasons for any insurance claims made in the past 12 months, designer breeds were much more likely to have been treated for surgery (34% vs. 10%) – surpassing both consultation claims and general illness, which are the most common insurance claims made across all dog breeds. Designer breeds were also more likely to have had insurance claims for diagnostic tests (22% vs. 6%), suggesting perhaps a humanised, preventative approach to medical care among their owners.

# Cats

Around 27% of households have cats, largely in line with the findings from 2016 (29%). The average number of cats per cat-owning household has also remained relatively steady at 1.4, with the estimated total population now at 3.8 million cats.

Across Australia, 43% of households have had a cat at some point, including 41% of those that don't currently have any pets.

## Cat comparisons

**Mixed breeds:** The large majority of pet cats in Australia remain mixed breeds (71%). Many owners are uncertain of the exact breeds involved, offering colloquial responses such as ‘domestic short-hair’, ‘mixed’, ‘moggy’ / ‘moggie’, ‘tabby’, ‘tortoiseshell’ / ‘calico’ - or simply naming the cat’s colours. Indeed, of all n=501 mixed-breed cats in our survey, the most common breed description provided was “don’t know”.

They are much more likely than other cats to have come from shelters (35% vs. 13%) or to be strays (15% vs. 5%); a number of owners also mentioned acquiring mixed-breed kittens from online sources, classifieds and an existing cat's litter. More than half of all mixed-breed cats were obtained for free (54%, vs. 35% for other cats), and a further third were bought for less than $200 (32%, vs. 16%).

The number one reason for obtaining a mixed-breed cat was to give them a home (34% vs. 15% of pure and designer breed cats). The number one role played by all cats in their household is that of a member of the family (60%) - though mixed-breed cats are also more likely to be considered 'fun for the children' (8% vs. 3%).

These cats are more likely to be kept entirely at home (86% vs. 71% for other cats), whereas pure and designer breeds are more likely to be taken out to public places, around the neighbourhood and on holidays - albeit at relatively low proportions.

**Pure or designer breeds:** Around a quarter of pet cats (24%) are pure breeds, and an additional 5% are considered 'designer breeds' by their owners. Text analysis of the breeds named by owners suggests these categories overlap significantly in people's minds - with frequently cited breeds including Ragdoll, Burmese, Siamese, British Shorthair, Persian, Bengal, Russian Blue and Maine Coon.

Interestingly, around a third of even those who consider their cats pure/designer breeds struggled to name the exact breeds, offering a lot of variants of “don’t know” or mixed breeds.

**Most popular pure breed cats / breeds used to create designer cats**


*QC1. What type of cat is [name]? Base: (n=133 cats).*

Perhaps unsurprisingly, pure and designer breed cats are much more likely to have come from a breeder (45% vs. 3% for mixed-breed cats), and were more likely than mixed breeds to have cost more than $200 (49% vs. 14%). These cats were more likely to have been obtained for companionship (49% vs. 29%), relaxation (5% vs. 2%) and good breed temperament (5% vs. 0%); further, they are also more likely to be considered support animals (8% vs. 2%).

Pure and designer breed cats were more likely to have been insured (26% vs. 17% for mixed-breed cats).

*NB: Results relating to cats throughout this report are largely based on a sample of n=539 cat owners, representing a maximum error margin of +/-4.2% at the 95% confidence level.*





## Fish

Around 11% households have pet fish. While this is on par with our 2016 findings (12%), there appears to have been a jump in the average number of fish kept per fish-owning household, rising from 8.9 to 10.7 – meaning there are now an estimated 11.3 million pet fish in Australia.

The majority of pet fish are kept in tanks indoors (69%), consistent with previous years. For the first time, fish owners were asked about the types of fish they kept, with fishbowl / cold water tank breeds the most popular (46%) - followed by tropical freshwater breeds (34%), pond fish (26%), and marine species (6%).

On average, these pet owners have been keeping fish for over five years, with longer-term owners balanced out by the 16% of households who have only had fish for less than a year. Across Australia, 22% of households have kept pet fish at some point, including 27% of those that don't currently have any pets.

## Birds

Around 9% of Australian households keep birds, down slightly from 11% in 2016. However, the average number of birds kept appears to have increased from 5.5 to 6.4 per bird-owning household, meaning there are currently an estimated 5.6 million pet birds in Australia.

Caged birds remain the most popular (kept by 56% of all bird owners), followed by birds in aviaries (37%); common species include budgerigars, cockatiels, lorikeets, finches and canaries. Chickens were also kept by 28% of all bird owners, with popular breeds including ISA Brown, Silkie and Sussex.

On average, these pet owners have been keeping birds for nearly six years, including 13% who have only had birds for less than a year.

Across Australia, 20% of households have kept pet birds at some point, including 28% of those that don't currently have any type of pets.

## Small Mammals

The proportion of households keeping small mammals as pets has remained relatively stable, now at just under 3%. The average number of mammals kept per mammal-owning household appears to have increased slightly to 2.4, meaning there are currently an estimated 614,000 pet small mammals in Australia.

Guinea pigs are now the most popular, owned by 46% of all households with small mammals. Meanwhile, the proportion of households with rabbits has fallen from 55% to 27% over the past three years. Other types of small mammals owned include mice and rats (19%) and ferrets (11%).

On average, these pet owners have been keeping small mammals for nearly four years, including 20% who have only had small mammals for less than a year. Across Australia, 5% of households have kept small mammals at some point, including 6% of those that don't currently have any pets.

## Reptiles

Around 2% of Australian households keep pet reptiles, on par with 3% in 2016. The average number of reptiles kept per reptile-owning household appears to have decreased to 1.9, meaning there are currently an estimated 364,000 pet reptiles nationally.

Turtles and tortoises are now the most commonly kept kind of reptile, up from 15% of all reptile owners in 2016 to 44% in 2019. This was followed in popularity by lizards (32%), snakes (25%), and frogs and salamanders (14%).

On average, these pet owners have been keeping reptiles for nearly six years, including 11% who have only had reptiles for less than a year. Across Australia, 3% of households have kept pet reptiles at some point, including 2% of those that don't currently have any type of pets.

*NB: Results relating to fish throughout this report are largely based on a sample of n=213 fish owners, representing a maximum error margin of +/-6.7% at the 95% confidence level. Results relating to birds throughout this report are largely based on a sample of n=179 bird owners, representing a maximum error margin of +/-7.3% at the 95% confidence level. Results relating to small mammals throughout this report are largely based on a sample of n=51 owners of small mammals, representing a maximum error margin of +/-13.7% at the 95% confidence level. Results relating to reptiles throughout this report are largely based on a sample of n=41 owners of reptiles, representing a maximum error margin of +/-15.3% at the 95% confidence level.*

# Who are Australia's pet owners?

While all types of people own all types of pets, certain segments of the Australian public are more likely than others to be pet owners:

| Pet-owners – 61% nationally, are more likely to be... (n=1,223) | Non-owners – 39% nationally, are more likely to be... (n=786) |
|---|---|
| **77%** - Families with children aged 6 years or older<br>**82%** - In particular, families with children aged 12-17 years | **45%** - Empty-nester singles/couples whose children have all left home |
| **70%** - Gen Z (18-24 years)<br>**66%** - Gen X (40-54 years) | **59%** - Pre-Boom (70 years or older) |
| **70%** - Rural households | **46%** - Urban or inner city households |
| **70%** - Those that are paying off a mortgage | **45%** - Those that are renting |
| **69%** - Those living in larger, free-standing houses | **61%** - Those living in apartments or units |
| **67%** - Three-person households<br>**76%** - Households of four or more people | **52%** - Solo households<br>**44%** - Two-person households |
| **67%** - Those who are employed by others<br>**71%** - In particular, casual employees | **51%** - Retirees |
| **65%** - Households with incomes of $50,000 or more | **46%** - Households with incomes of less than $50,000 |
| **64%** - Women | **42%** - Men |
| **63%** - Those not from CALD* backgrounds | **43%** - Those with at least one parent born overseas<br>**42%** - Those from CALD* backgrounds |

**Culturally and linguistically diverse: At least one parent born overseas, usually speak a language other than English at home, migrated to Australia within the last decade, and/or identify as Aboriginal or Torres Strait Islander.*

Many of these traits of pet owners and non-owners tend to 'cluster' – for example, older Australians are more likely than others to be living alone, to be empty-nesters, to be retired and/or to have lower household incomes. A notable exception to this is the high propensity for rural households to have pets despite being more likely to have lower incomes – bucking an overall correlation between income and pet ownership. While it may seem Gen Z is another exception – being more likely than older Australians to be renting and/or living in urban areas – our survey data show they are also more likely to still be living at home and thus may be referring the family pet they have left with their parents.

**Above and beyond these common traits of pet owners, some pet-specific differences of note also emerge...**

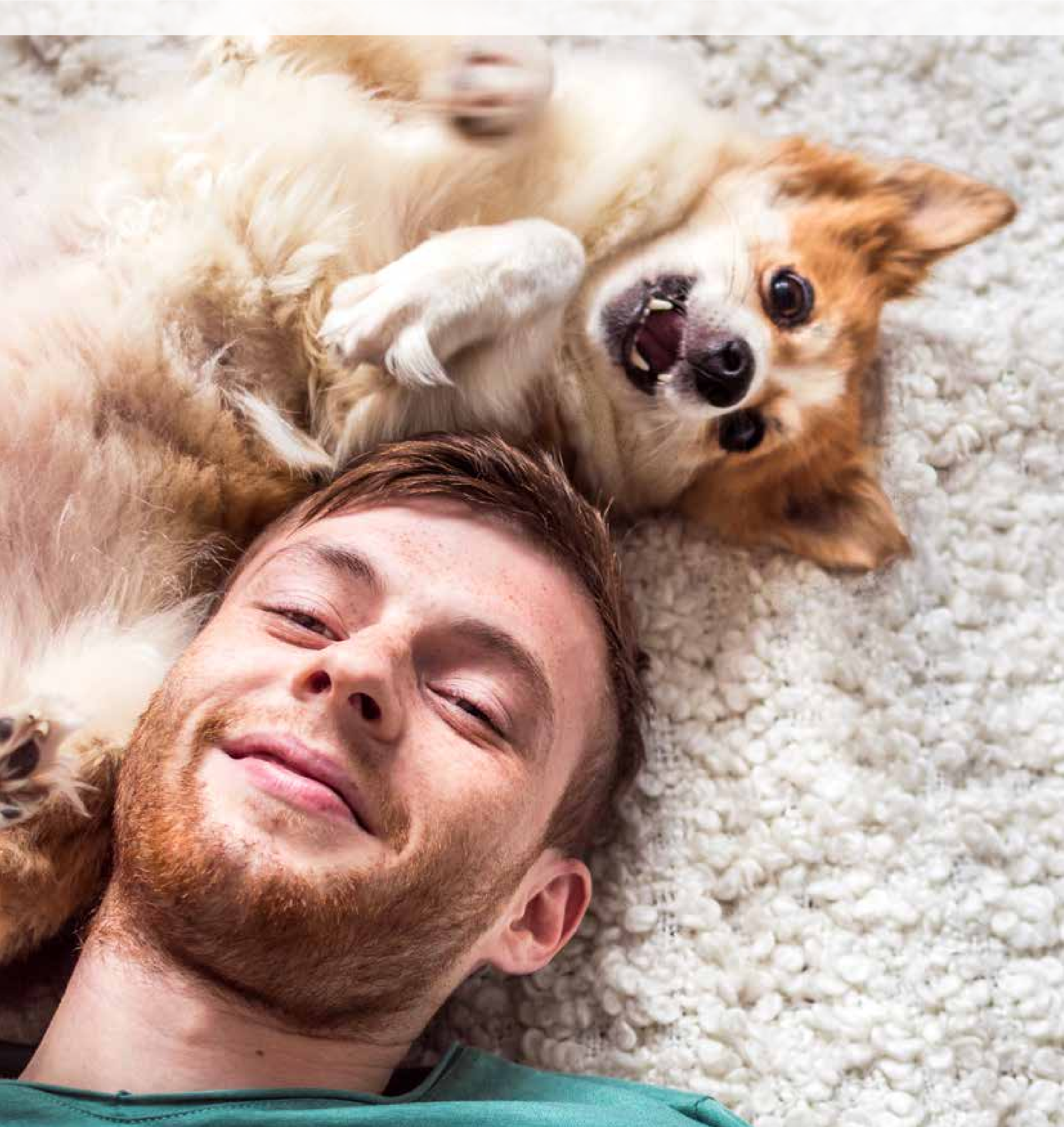
- Dog owners are more likely than others to be living in the ACT (62%), Gen Y - i.e. 25-39 years (45%) or employed full-time (45%). The data suggests this is also true for those identifying as Aboriginal or Torres Strait Islander (71%) - though despite the overwhelming strength of this result, it was based on a small sample of n=28 participants and should be interpreted with caution.
- Cat owners are more likely than others to be living in South Australia (37% of households vs. 27% nationally), unemployed (36%), managing home duties (34%), Gen Z - i.e. aged 18-24 years (34%), or female (30%).
- Those who keep pet fish are more likely than others to be living in NSW (13% of households vs. 11% nationally), living in a suburban area (13%), or Gen X - i.e. aged 40-54 years (15%).
- Bird owners are more likely than others to be living in the ACT (25% of households vs. 9% nationally), managing home duties (18%), or from non-CALD backgrounds (11%).
- Small mammal owners have a similar profile to pet owners overall.
- Owners of pet reptiles are more likely than others to be living in NSW (3% of households vs. 2% nationally).

“My dog has been a constant source of love since my husband passed, I can talk to her and she seems to understand what I am saying to her, I tell her everything and feel instantly better, and she knows when I am having a bad day and she nuzzles me as if to say ‘I love you mum”

***Dog owner, South Australia***

# 2.

# Pets and people



**Australians love living with pets, whether they're big and furry or small and scaly. Considering that 90% of Australian households have had a pet at some time, and 71% of pet owners say their pets have a very positive impact on their lives, that's a lot of happy people.**

## Benefits of Pet Ownership

Most pet owners describe the relationship with their pet as being somewhere on the scale between close companion and beloved family member. This close relationship is seen as a two-way street with pet owners describing the affection, loyalty and love they receive from their pets in the same way as the love they give them. Their pets are often their best friends and faithful companions. Many mentioned being unable to imagine life without their pets and are clearly emotional in the way they describe the joy of spending time with their pets, playing with them, creating memories and keeping life interesting.

"Dogs make people happy. They lift your spirits, fight depression. They take your mind off problems, make you exercise. No downsides just love and support."

***Dog owner, Tasmania***

"They are just like our children, and they comfort us when we are not feeling well!"

***Cat and dog owner, New South Wales***

"My boy is part of the family and I do not know what I would do if he was not around. He's the love of my life!"

***Dog owner, New South Wales***

Survey participants also describe the positive impact of pet ownership on both their physical and mental health. This experience is supported by academic research which outlines the benefits of pet ownership on owner health including cardiovascular health, physical fitness, immune system development, psychological health and child development, as well as benefits of pets acting as social enablers[1].

They report their pets as being a calming influence, lowering blood pressure and promoting exercise.

Pets are also seen to promote optimism, with many survey participants saying that caring for another living being can bring a sense of purpose to their lives. In the same vein, many also report that their pets have a direct positive impact on their experiences of depression and anxiety.

- For some, this is about having a friend who would care for them unconditionally, who won't judge them based on what they may or may not be able to do on any given day, and who will always be there to listen to their worries.
- For others, the pet's dependency on them was a motivating factor, and some mentioned it was the only reason they got out of bed each day.
- Others simply mentioned that the happiness pets bring just makes their lives a little better – a source of fun and laughter in what can otherwise seem like a very heavy world.

[1] Smith, Bradley. *"The 'pet effect': Health related aspects of companion animal ownership"*, Australian Family Physician, Volume 41, No.6, June 2012)

> “It has changed my life for the better and made me much happier. It gives me something to love and look forward to when I get home. The benefits completely outweigh the downsides.”
>
> ***Dog and fish owner, South Australia***

A few also mentioned the social benefit of owning pets, in that it gave them an opportunity to meet neighbours, other dog owners while out walking, a common point of conversation with like-minded people, and a conversation starter when meeting new people.

While an overwhelming majority of pet owners feel positively about their experience (88% ‘somewhat’ or ‘very’ positive), the 3% who felt that pets had a negative impact cited the cost of caring for pets, the limits on their travel and ability to be spontaneous, the level of cleaning and maintenance required, and the pain of mourning when a pet passes away.

**Impact of pet ownership on life (%)**

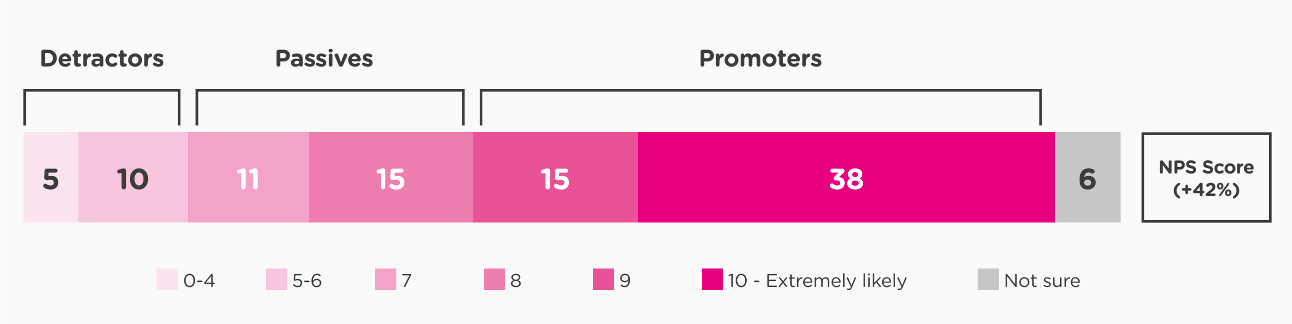

*QF18. On balance, what kind of impact – positive or negative – has being a pet owner had on your life? Base: Pet owners (n=1,221).*

> “My pets have changed my life in a more positive way because it has made me less selfish, so that I think of someone other than myself.”
>
> ***Cat, dog and small mammal owner, Queensland***

Overall, the people who own pets are strong advocates for the benefits they bring. Around 57% are 'promoters' of pet ownership – i.e. giving a rating of 9-10 out of 10 when asked how likely they are to recommend getting a pet to a friend or family member.

If pets were a brand, they would have a 'Net Promoter Score' of +42%[1], outstripping typical scores for charities and most big name brands.

**Likelihood to recommend getting a pet (%)**




*QF20. All things considered, how likely would you be to recommend getting a pet to a friend or family member who didn't have one? Base: Pet owners (n=1,221).*

"Absolutely for the better, even through all the negatives Widget remains the one constant source of positivity."

***Cat, dog and fish owner, Western Australia***

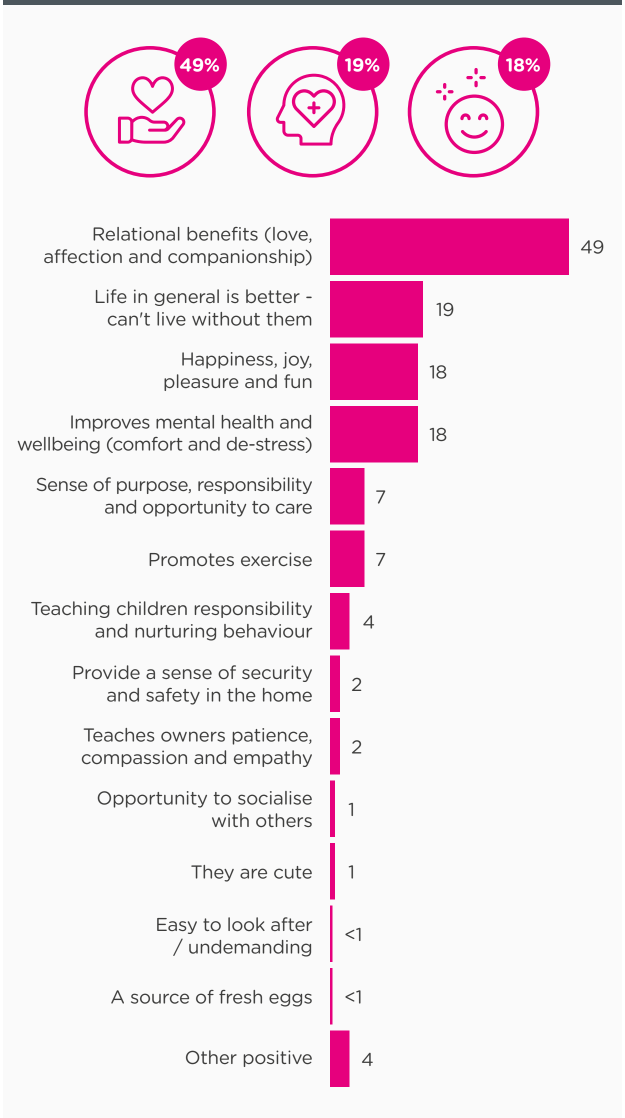
"I suffer from depression, so he has made a positive impact on my life by making me get out of bed in the mornings so that I can feed him. Sometimes when I have really low moods, I find it a bit difficult to care for him"

***Cat owner, Tasmania***

[1] The 'Net Promoter Score' measures how likely people would be to promote an idea or product. The Score is determined by the percentage of people deemed to be 'promoters' (those rating 9 or 10 on their likelihood to recommend) subtracted by the number of 'detractors' (those rating 0 to 6), with "don't know" responses omitted in the calculation. In this case, the Net Promoter Score of pets is +42%, on a scale of -100 to +100 – with 57% promoters, 15% detractors and 28% 'passives' (i.e. ratings of 7 or 8). A score of 0 or higher is generally considered positive, and 50 or more outstanding.

When pressed to think about the benefits and downsides pet ownership has brought them personally, the top responses from our survey participants were relational benefits such as love, affection and companionship (49% of all pet owners), followed by life being better in general (19%), happiness / joy / pleasure / fun (18%) and improved mental health and well-being (18%). In contrast, the top downsides were cited by only 4% of pet owners – inconvenience for those who are often away from home, and on-going costs.

**Benefits of pet ownership (Pet owners) %**

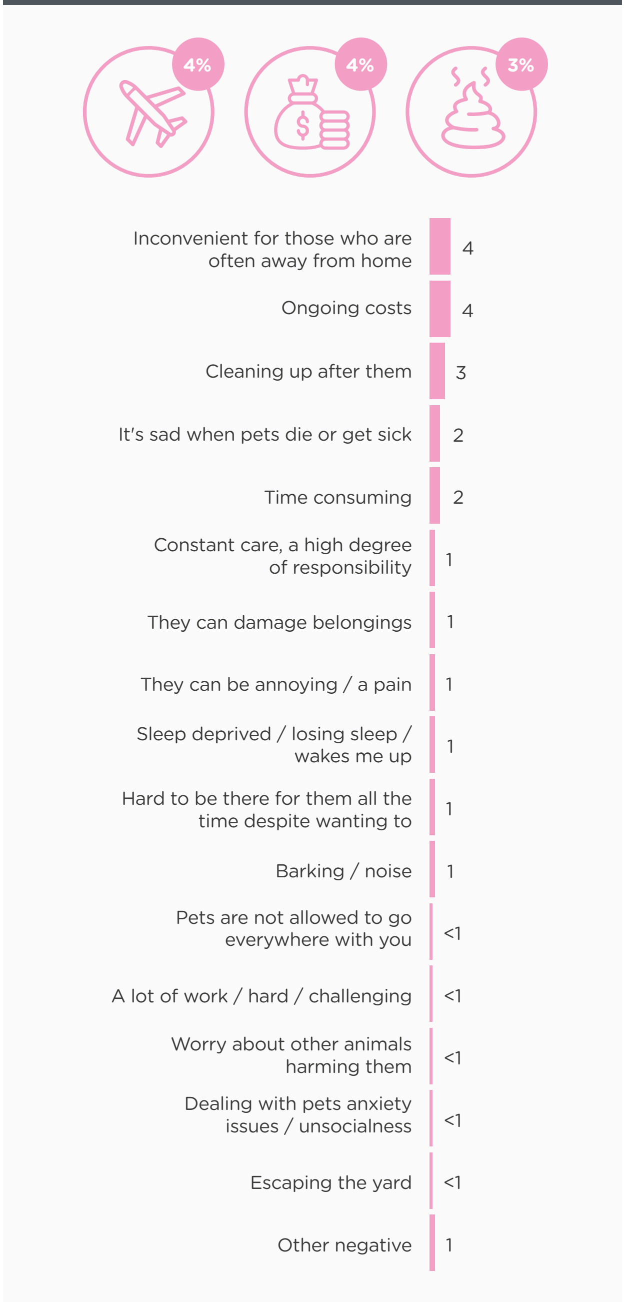



*QF19. How has being a pet owner changed your life, for better or worse? What are some of the benefits or downsides? Base: Pet owners (n=1,221).*

“Just helps me to focus away from myself for a while.”

***Cat and dog owner, South Australia***

**Downsides of pet ownership (Pet owners) %**




*QF19. How has being a pet owner changed your life, for better or worse? What are some of the benefits or downsides? Base: Pet owners (n=1,221).*

**Common words used to describe the personal impacts of having a pet**


*QF19. How has being a pet owner changed your life, for better or worse? What are some of the benefits or downsides? Base: Pet owners (n=1,221).*

## Reasons for getting a pet

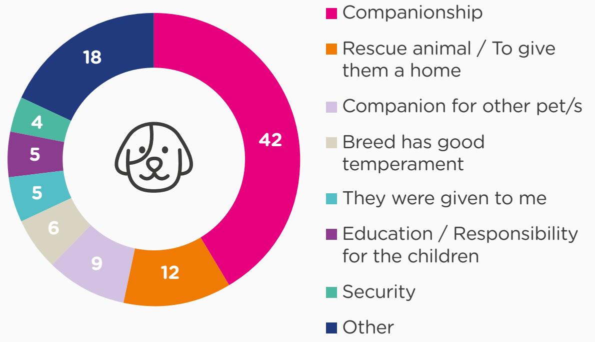
Typical reasons for getting a pet include companionship, rescuing animals, being given animals, teaching children responsibility, and for relaxation – though these varied for different types of pets.

Companionship is by far the most common reason for getting a dog (42%), cat (35%), bird (30%) or small mammal (27%). The top reason for getting fish is relaxation (39%), which is also notably true for reptiles (17%). Meanwhile, the top reason for getting a reptile is that they are considered lower-maintenance (21%) – a view some people also hold about fish (16%).

Other notable differences include:

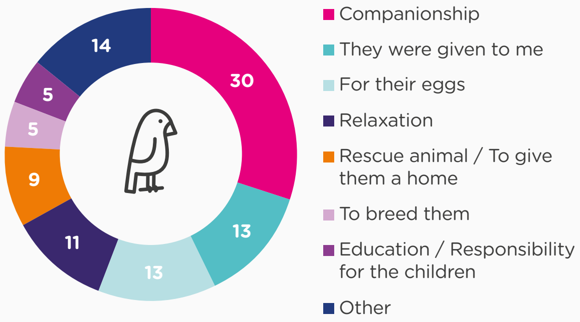
- Cats and reptiles are especially likely to have been rescue pets (28% and 18%, respectively).
- Birds are especially likely to have been given to their owners and to be kept for their eggs (both 13%).
- Small mammals are considered particularly suitable for teaching children responsibility (17%).

## Top reasons for getting dogs (3%+ only)



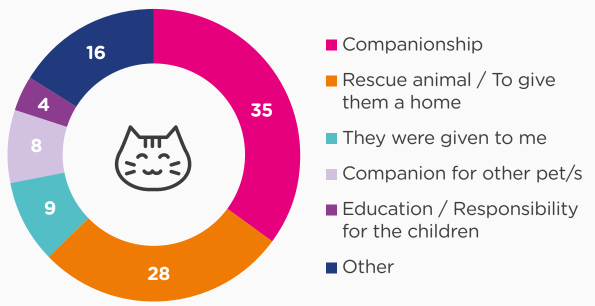

*QD9 - What was the main reason that you decided to get your dog/s? Base: (n=1,013 dogs).*

## Top reasons for getting birds (3%+ only)



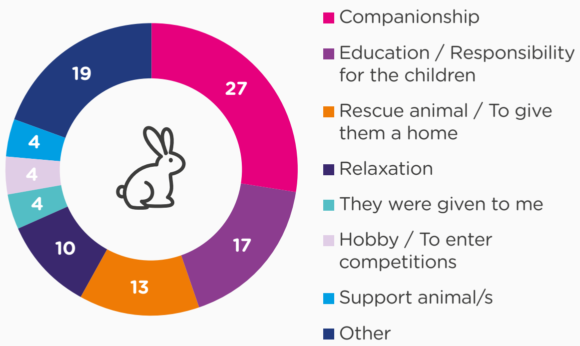

*QB3 - What was the main reason that you decided to get your bird/s? Base: Bird owners (n=171).*

## Top reasons for getting cats (3%+ only)



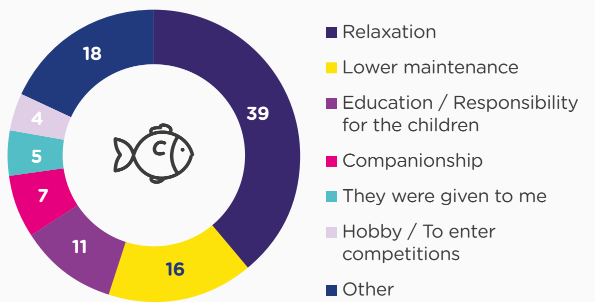

*QC8 - What was the main reason that you decided to get your cat/s? Base: (n=705 cats).*

## Top reasons for getting small mammals (3%+ only)



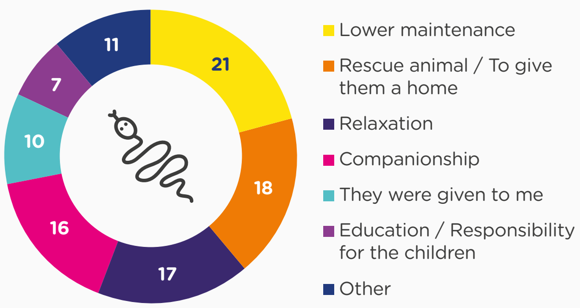

*QI3 - What was the main reason that you decided to get your small mammal/s? Base: Small mammal owners (n=42).*

## Top reasons for getting fish (3%+ only)




*QE5 - What was the main reason that you decided to get your fish? Base: Fish owners (n=213).*

## Top reasons for getting reptiles (3%+ only)




*QH2 - What was the main reason that you decided to get your reptile/s? Base: Reptile owners (n=40).*

# The role of pets in the household

Dog and cat owners tend to regard their pets as 'fur babies'.

Consistent with 2016 findings, 63% of dog owners refer to their pet as a member of the family, with 23% regarding them as companions. Similarly, cats are also commonly seen as family members (60%, down slightly from 65% in 2016) – with qualitative indications that owners may be instead increasingly seeing their cats as more independent companions (27%, vs. 24% in 2016).

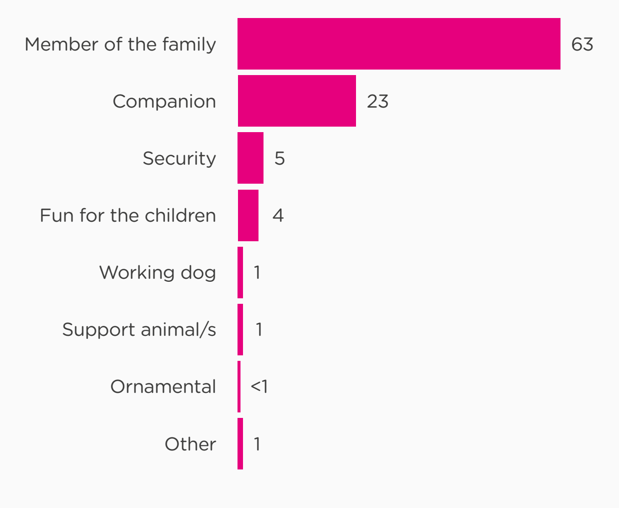
Around 5% of dogs were characterised as primarily guard dogs while 4% were described as 'fun for the children' – as were 7% of cats. This year, the survey also asked specifically about support animals, with 1% of dogs and 3% of cats fulfilling this as their primary role.

**Pet roles appear strongly tied to generational attitudes:** Dogs are especially likely to be considered family members by Gen Z (73% vs. 62% of older owners), and more likely to be considered simply companions by Baby Boomers and older owners (34% vs. 18% of Gen X or younger owners).

While no such differences are evident for cat roles among different age groups, feline family members are more prevalent among couples who haven't had children (71%).

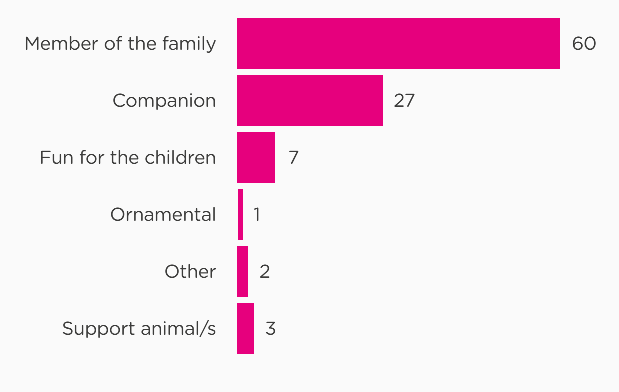
**Cultural attitudes also play a role in the perceptions of dogs:** They are much more likely to be seen as 'fun for the children' by owners who speak a non-English language at home, are relatively recent migrants, or identify as Aboriginal or Torres Strait Islander (9% vs. 4% of all other dog owners).

**What is the main role your dog plays in your household (%)**




*QD11. What is the main role [DOG] plays in your household? Base: (n=1,013 dogs).*

**What is the main role your cat plays in your household (%)**



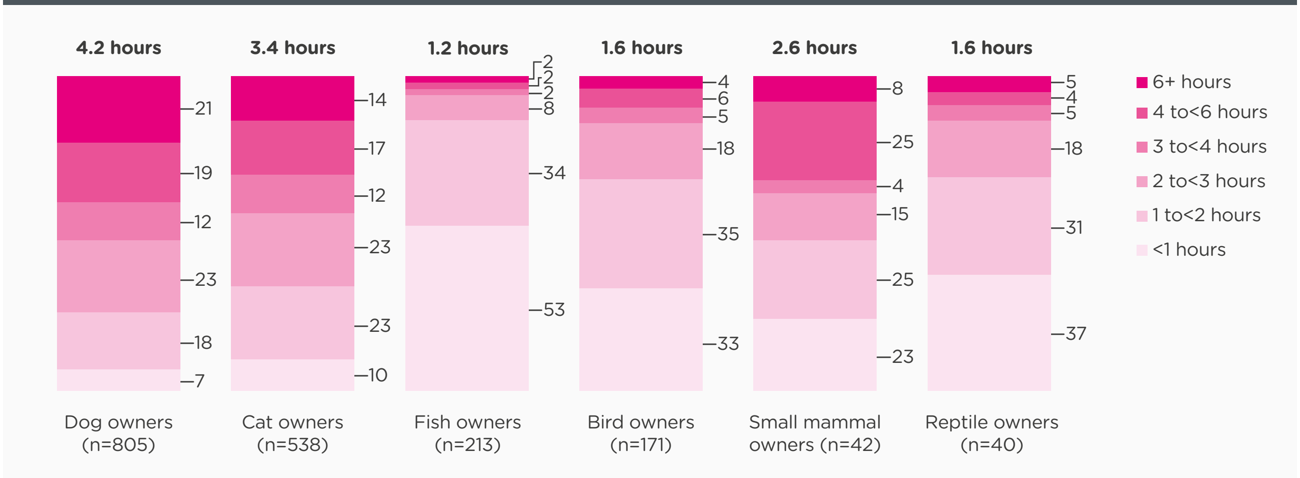

*QC10. What is the main role [CAT] plays in your household? Base: (n=705 cats).*

## Time spent with pets

In line with the general view of pets as family, dog owners report spending an average of 4.2 hours with their fur babies each day, and cat owners an average of 3.4 hours.

At the higher end of the spectrum, 21% of dog owners and 14% of cat owners say they spend six hours or more with their pets each day. This includes a higher ratio of women (25% of female dog owners vs. 17% of males, and 17% of female cat owners vs. 9% of males), as well as dog owners who are retired (32% vs. 19% of other dog owners).

**Time spent with pets on an average day (%)**




*QB8, QC24, QD25, QE8, QH8, QI8. Approximately how many hours do you spend directly interacting with your [pet/s] on a typical day? This can include looking after them, grooming, exercising or training them, or just generally interacting with them.*

## What's in a name?

The most popular names for both cats and dogs are often human names, in keeping with the idea that pets are viewed as members of the family. Other common naming conventions include borrowing names from popular culture, literature, and ancient mythologies.

**Australia's top dog names**


*QA9dogs. What is the name/are the names of your dog/s? Base = (n=1,065 dogs).*

**Australia's top cat names**


*QA9cats. What is the name/are the names of your cat/s? Base = (n=780 cats).*

Comparing the names of cats and dogs whose owners took part in this study to the most popular baby names of 2019, it is clear that the trends dominating baby names are also prominent for our fur babies:

- Of the top 100 girls' names, 55 also appeared as pet names in this study – 18 as dog names, 10 as cat names and 27 as both cat and dog names.
- Of the top 100 boys' names, 49 were shared by pets in this study – 20 as dog names, 8 as cat names and 21 as both cat and dog names.

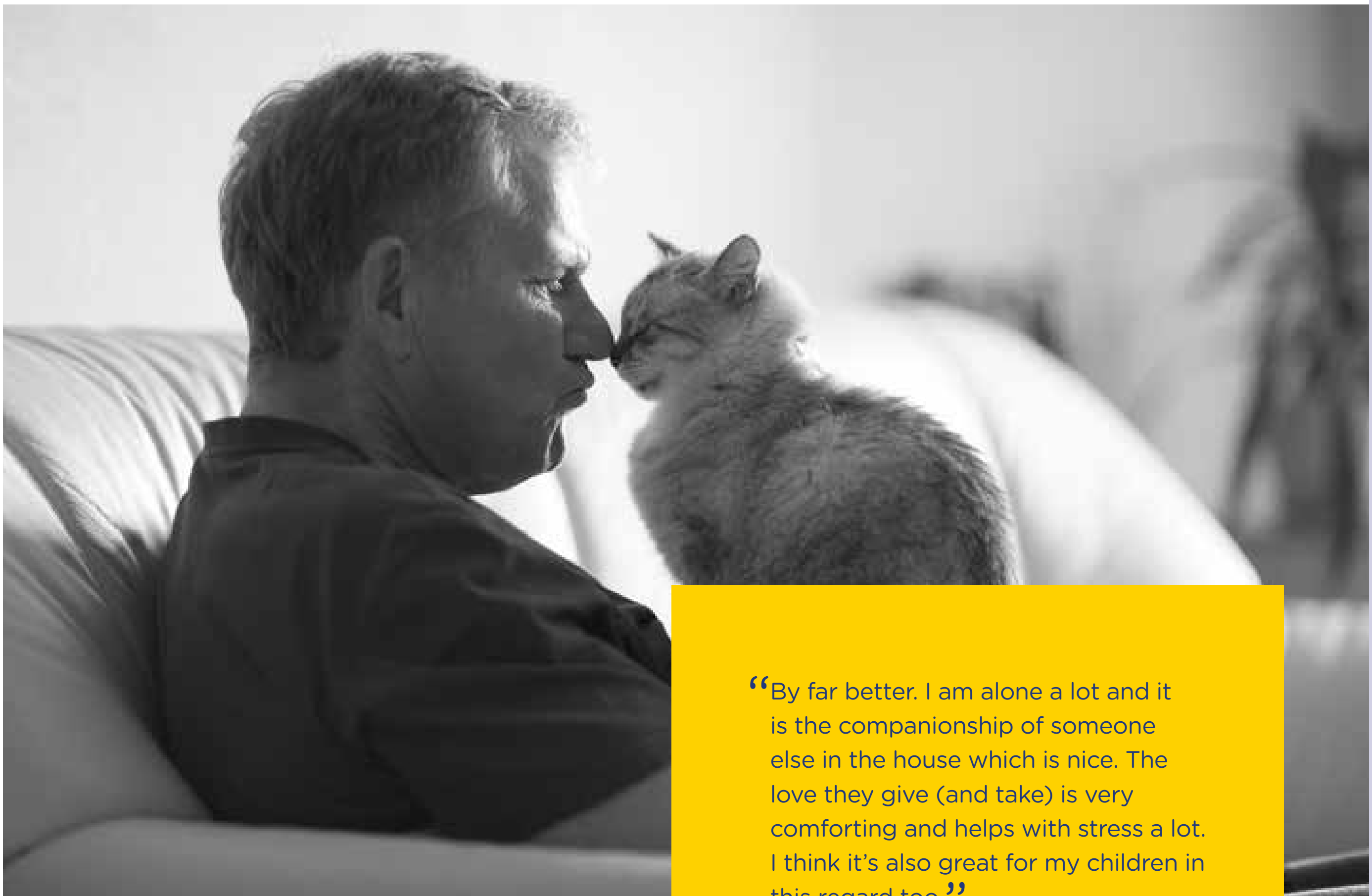
## Confessions of pet parents

Many pet owners have adopted 'pet parenting' behaviours that mimic traditional parent-child relationships. Around two-thirds speak to their pets as though they understand the words.

Owners also reported being focused on the welfare or comfort of the pet (such as the type of food it is fed, where it sleeps, training and discipline and controlling temperature and ambient noise to calm the pet), giving their pets gifts, referring to themselves as their parent, and taking the pet with them on holidays.

The proportion of owners who speak to their pets as though they understand increases with each generation and is inversely proportionate to the number of people in the household: For example, 82% of the Pre-Boom Generation (70yrs+) and 72% of Baby Boomers (55-69yrs) talk to their pets, and 72% of solo and two-person households do the same.

It may be that as the makeup of our households change over time pet parenting behaviours might fill an important social role in our homes – helping us to feel connected and giving us someone to talk to. Similarly, 1-2 person households are also more likely than larger households to allow pets to sleep in the same bed (53% vs. 40% of larger households).

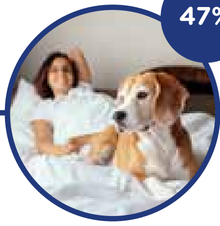


"By far better. I am alone a lot and it is the companionship of someone else in the house which is nice. The love they give (and take) is very comforting and helps with stress a lot. I think it's also great for my children in this regard too."

***Cat owner, New South Wales***

## Activities done with pet (%)

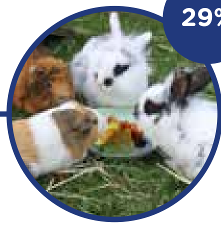

64% Talk to them regularly as if they understand you


47% Allowed them to sleep in/on the same bed as you


37% Referred to yourself as their 'parent'

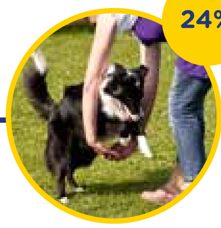

36% Given them gifts for special occasions


35% Left on the heating/ cooling, lights or TV/radio for them


29% Cooked or made treats for them


25% Rearranged personal commitments around them


25% Taken them on holidays / road trips


24% Taught them tricks or enrolled in obedience training

- 23% Given them premium / expensive human food
- 14% Arranged play dates with other pets
- 14% Taken time off work to look after them
- 13% Bought or made them outfits / costumes
- 11% Organised sitters and pick-up/drop-off for them
- 7% Called / video-called them while away from home
- 7% Participated in pet-owner social media forums
- 6% Threw a birthday party with other pets and people
- 5% Opened a social media account for them
- 5% Installed home monitoring cameras for them
- 3% Taken them on a flight / Flown them somewhere
- 3% Worn matching outfits / accessories with them
- 14% None of the above

*QF17. Have you ever done any of the following for any of your pet/s? Base: Pet owners (n=1,221).*

But while older people are speaking to their pets more often, those under the age of 40 (i.e. Gen Z and Y) are more likely to inject some 'fun' socialisation into their pets' lives.

| | Aged <40yrs | Aged 40yrs+ |
|---|---|---|
| Give them gifts for special occasions | 40% | 33% |
| Bought or made them outfits / costumes | 21% | 8% |
| Arranging playdates with other pets | 19% | 11% |
| Calling or video calling them while away from home | 13% | 3% |
| Actively participating in pet owner social media groups | 10% | 5% |
| Throwing them a birthday party with other pets and people | 10% | 3% |
| Opening a social media account for them | 9% | 2% |
| Installing home monitoring cameras for them | 9% | 2% |
| Wearing matching outfits / accessories with them | 6% | 1% |

*QF17. Have you ever done any of the following for your pet/s? Base: Pet owners (n=1,221).*

## What to do when you can't look after your pets

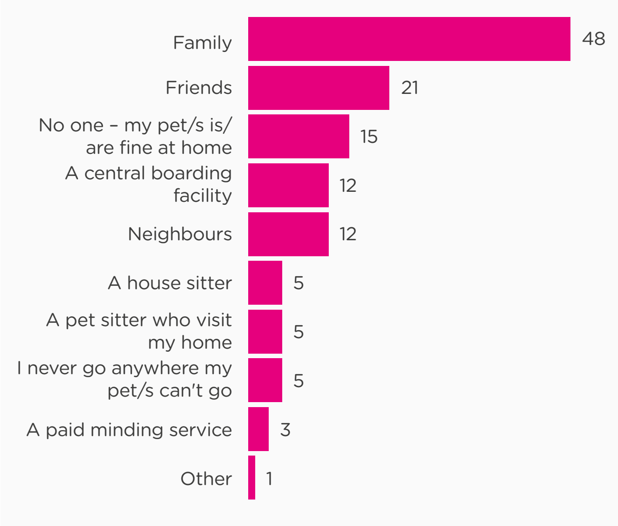
When owners are unable to have their pets with them for the short term, most turn to family (48%) or friends (21%) for help. It may be that this further indicates the emotional bond we have with our pets; we want them to be cared for by someone familiar or trusted – or at least someone who will do it for free!

Those who live in urban or inner-city areas are significantly more likely to use a pet sitting service than other pet owners (10% vs. 4%). This is likely due to saturation of these services in inner-city areas, and subsequent awareness and access.

Pre-Boomers (aged 70yrs+) are significantly more likely than Gen Y or Gen Z (aged 18-39) to feel their pets will be fine at home alone – 24% vs. 11%.

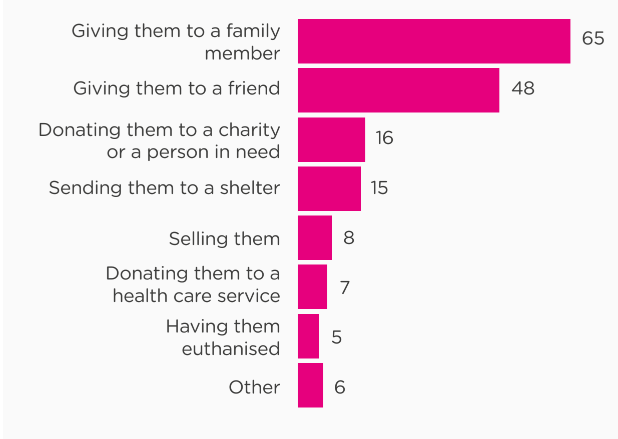
When faced with the idea that they may not be able to look after their pets in the longer term, by far the most popular option is again to have a friend or family member take care of them (65% and 48% respectively) - reflecting the close emotional bond the majority of owners have with their pets. The next most popular approach would be to donate them to a charity (16%) or to send them to a shelter (15%) – while a small proportion say they would consider euthanising their pet (5%).

**Who normally looks after your pets for you? (%)**




*QF15. When you are unable to have your pet/s with you, who normally looks after them for you? Base: Pet owners (n=1,221).*

**What options would you consider if you couldn't look after your pets (%)**




*QF16. If you could no longer look after your pet/s, which of the following options would you consider? Base: Pet owners (n=1,221).*

# 3.

# Barriers and challenges

## While 61% of all Australian households already have a pet, there are many more who would like to own one.

An estimated 2.3 million pet-free households are either currently interested in or actively considering a pet in the next 12 months – while another 686,000 pet-owning households are also actively considering getting another one (or more) within the year.

This means there are nearly 3 million estimated households in total - or 31% of all households in Australia - that are currently open to the prospect of new or additional pets.

But for many, their housing situation or lifestyle is holding them back.

# Prospective pet owners

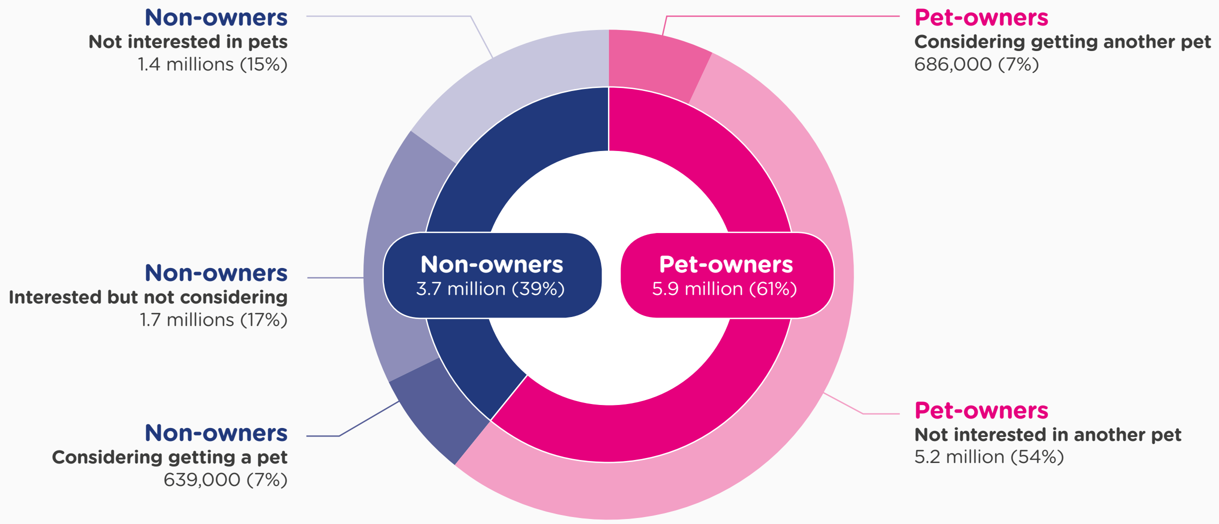
Around 62% of pet-less households (i.e. 24% of all households) are interested in the idea of getting a pet.

Relative interest in different types of pets largely reflects current patterns among pet owners. Among Australia's 3.7 million pet-free households, 48% would like a dog - up from 43% in 2016. Another 20% would like a cat - with relatively lower levels of demand for fish (7%), birds (6%), small mammals (3%) and reptiles (2%).

Children of primary school age play a key role in determining certain types of prospective pets: Pet-free households with children under the age of 12 are much more likely than other pet-free households to be interested in fish (19% vs. 6%) and small mammals (7% vs. 2%).

Interest in future pet ownership overall is particularly strong among pet-free households that rent (55% vs. 43% of pet-less owner-occupier households). This is likely as a result of those in owner-occupier households wanting a pet being more able to do so than those sometimes restrained by landlord requirements.

**Australian households by current and prospective pet ownership**




*QA9. Which of these pets, if any, would you like to own? QA13. In the next 12 months, are you planning on getting any of the following types of pet? QF8. Are you planning on getting another pet in the next 12 months? Base: All participants (n=2,013). Extrapolations based on survey data and ABS population and household estimates. See technical notes for further information.*

The gap between interest and intention, however, can be great: An overwhelming majority of interested pet-free households (72%) are not quite ready to make the next step, while just 28% said they were seriously considering a pet within the next 12 months.

Of all pet-free households, only 17% said they would get a dog (compared to 48% who were interested) and 8% were serious about cats (compared to 20% interested). Unsurprisingly, fish appear generally more 'attainable', with 5% of all pet-free households contemplating buying fish compared to 7% who were interested. Meanwhile, the proportion seriously considering other types of animals drops to 1% for birds and 0% for both small mammals and reptiles.

Echoing findings regarding general interest in getting a pet, pet-free households with children are much more likely than others to be seriously considering one - including 46% of those with kids under the age of 18 (vs. 24% of other types of households). In particular, these families were more likely than others to be considering a dog (30% vs. 15%) or birds (3% vs. 0%).

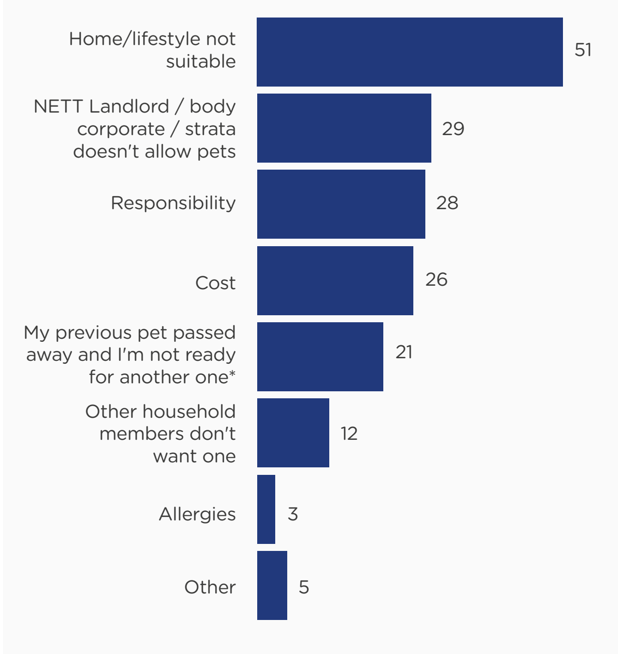
Meanwhile, those living in a share house without a pet were also more likely than others to be seriously thinking about getting a dog (28% vs. 16%) - as were those in larger households (31% of households of three or more, vs. 11% of solo or duo households). This is perhaps a result of being able to share caring responsibilities with more people.

## Barriers for non-owners

Among non-owners who would like to have a pet, the main barrier by far is that their home or lifestyle is not suitable (51%). When taken in context with other findings from this study, this is likely to reflect people's desire to be good 'parents' to their pets, dedicating enough time and energy to their wellbeing.

Three in ten interested non-owners (29%) cited barriers posed by landlords, strata laws or body corporate rules – with a disproportionate impact on renters, those in apartments and those in inner-city areas. For example, these barriers impacted only 10% of those who own their homes – compared to 55% of renters. Similarly, only 11% of those living in larger houses were concerned about this, vs. 55% of those in apartments – and 25% of those living outside inner-city areas vs. 41% of those living in the urban core.

**Reasons for not owning a pet (%)**




*QA10. What are the reasons you do not currently own a (pet type)? Base: Aspiring non-owners (n=486).*

Prospective owners are also concerned about on-going responsibilities (28%) and costs (26%). These issues are much more pronounced for those who have an immigrant parent, usually speak a non-English language at home or are themselves a recent a migrant – i.e. a few cohorts within the community who are already less likely to be pet owners. While further investigation is required, this suggests a lack of cultural familiarity with pet ownership or difficulties estimating what's involved in keeping a pet.

Meanwhile, 21% said their previous pet had passed away and they are not yet ready for another one. Indeed, mourning the loss of a previous pet is the key difference between those actively considering a pet in the next 12 months and those who are not - 28% vs. 18% - whereas other barriers are largely consistent in the minds of all non-owners broadly *thinking* about getting a pet.

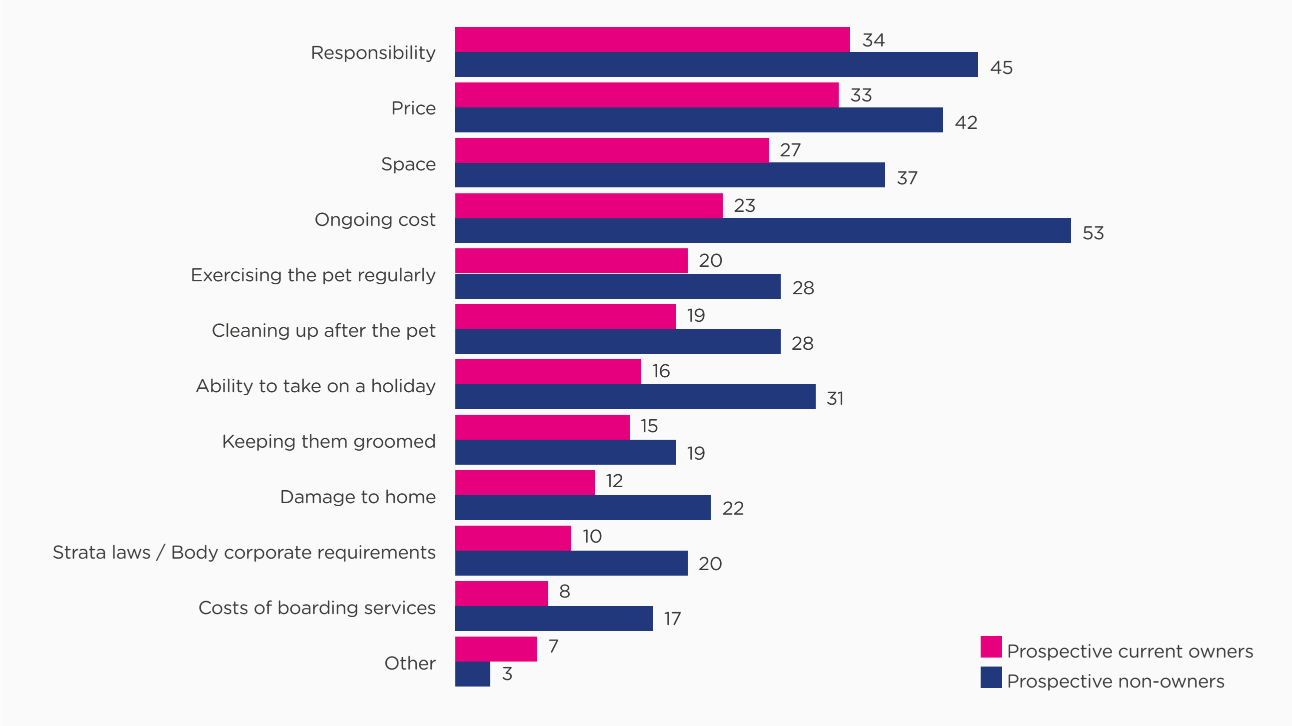
# Factors influencing purchase

Among non-owners, those who are actively considering getting a pet in the next 12 months said that their biggest considerations in deciding to obtain a pet would be the ongoing cost (53%), responsibility (45%), the upfront price (42%) and the space required (37%).

Many of these decision drivers are consistent with sentiment expressed by current pet owners who are considering another pet in the next 12 months – albeit with relatively lower proportions across all factors, suggesting perhaps these are not as prominent in the minds of pet owners who already know what to expect.

The greatest gaps in expectations exist around perceptions of on-going costs (cited by 53% of non-owners vs. 23% of current pet owners), the ability to take pets on holidays (31% vs. 16%), space (37% vs. 27%), potential damage to the home (22% vs. 12%) and strata / body corporate requirements (20% vs. 10%). Among current pet owners who said 'other', a few pointed to the importance of making sure any new pet gets along with other pets in the household.

**Factors influencing prospective pet ownership (%)**




*QA14, QF10. Which of these factors do you think will influence your decision to get a/another pet in the future? Base: Prospective non-owners (n=131) and prospective current owners (n=141).*

This shows that those who already have experience with a pet assess their likely impacts and needs as being less than those without one. It highlights an opportunity for greater education of the costs and benefits associated with pet ownership to ensure life-long responsible ownership without setting unrealistic expectations.

For more resources on responsible pet ownership, please visit: **www.animalmedicinesaustralia.org.au.**

## Pet caring responsibilities

**Primary pet carers** tend to report the traits that might be expected of passionate 'pet parents'. They are more likely to also be living with high-school-aged children of 12-17 years (64% vs. 53% all other pet owners), Gen X (59% vs. 52% of those from other generations) or women (58% vs. 49% of men).

Primary carers are more likely than other pet owners to:

- Rely on the RSPCA or animal shelters for pet-related information (9% vs. 4%);
- Actively participate in pet-owner social media groups (8% vs. 5%);
- Open a social media account for their pets (7% vs. 4%); and
- Say they never go anywhere their pets can't go (6% vs. 3%).

Those who say they **share caring responsibilities** equally with someone else exhibit many of the same behaviours as primary carers, though they typically have family members to call on and are more likely to feel they don't have as much time for their pets as they'd like. These owners tend to be men (43% vs. 35% of women); they are also more likely to have had no children, only adult children living at home or all children having left home, or be aged 70+ themselves (50% vs. 38% of those from other generations).

These 'co-owners' are more likely to call on family members when they can't have their pets with them - either temporarily (57% vs. 43%) or permanently (71% vs. 62%). They are also more likely than other pet owners to:

- Refer to themselves as a pet parent (41% vs. 35%);
- Take their pets on holidays (28% vs. 23%);
- Worry about their capacity to give their pets enough attention (23% vs. 16%);
- Arrange play dates with other pets (18% vs. 12%); and
- Have bought their pets an outfit or costume (16% vs. 12%).

Pet owners who **rely on someone else** for primary pet-caring exhibit indications of being reluctant owners; they are more likely to be Baby Boomers (10% vs. 6% of those from other generations) or living with adult children at home (11% vs. 6% of all other pet owners). Indeed, when asked if they would recommend having pets to others, 34% gave low ratings of 0-6 out of 10, compared to 14% among all other pet owners.

These 'secondary' pet owners are more likely than other pet owners to:

- Gripe about cleaning up after their pets (34% vs. 22%);
- Say their pets are fine unattended at home (24% vs. 14%); and
- Consider selling their pets if they could no longer look after them (16% vs. 7%).

## Challenges in pet ownership

While the vast majority (88%) of pet owners feel positively about their 'pet parenting' experiences, 66% still admit they experience some difficulties – particularly pet owners living in inner-city areas (78% vs. 64% all other pet owners).

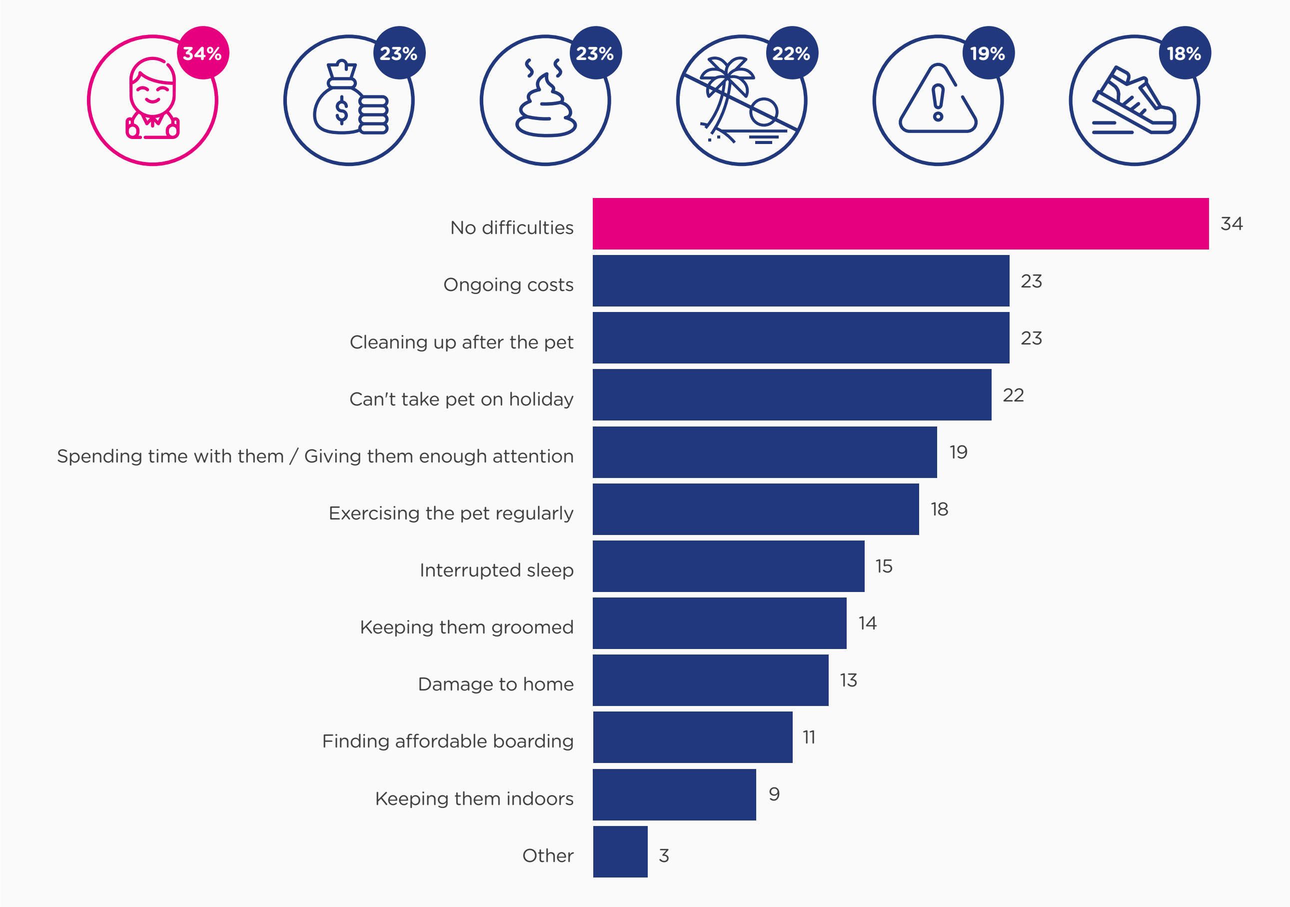
The most common difficulties faced by pet owners include ongoing costs (23%), cleaning up after the pet (23%), and being unable to take their pet on holiday (22%). Each of these concerns are more pronounced among people with CALD backgrounds (including those with at least one parent born overseas) and members of Generation Z (i.e. aged 18-24).

Some professional cleaning services certainly exist for pets and their owners – for example, fish tank maintenance services, or even general household cleaning that includes removal of pet fur.

However, it's the pet holiday market that's perhaps booming the most: 25% of all pet owners say they take their animal companions on holidays or road trips, including 35% of dog owners. Pet-friendly travel and accommodation options appear to be on the rise, with more than 12,000 pet-friendly listings on accommodation platform AirBnB[1,2] and air transport services like Jetpets flying more than 50,000 pets each year.

At a lower level, 19% of current pet owners are worried about not giving their pets enough attention and 18% find exercising the pets regularly a challenge. Overall, 34% say they experience 'no difficulties', suggesting perhaps that the benefits have outweighed many of the concerns that are more prominent in the minds of those without pets.

**Difficulties with pet ownership (%)**




*QF13. Which of these difficulties, if any, do you experience with pet ownership? Base: Pet owners (n=1,223).*

1 Domain.com.au, *Australia's most popular pet-friendly Airbnb* listings https://www.domain.com.au/news/australias-most-popular-petfriendly-airbnb-listings-20161117-gsqe5e/
2 Australian Traveller, *Best perfectly pet-friendly stays around Australia* https://www.australiantraveller.com/australia/pet-friendly-airbnb-stays/

# 4.

# Putting a value on pets

**If the amount of money spent is any indication of the value Australian households place on their pets, then they could well be considered priceless.**

**We are now estimated to be spending over $13 billion[1] per year to keep our pets fed, healthy and well-accessorised - with food and veterinary services continuing to account for half of all on-going expenditure.**

[1] All expenditure estimates are based on survey participants' recollections of spending over the past 12 months, extrapolated to all households relevant for each type of pet owned. These should be interpreted in conjunction with actual sales data where available.

## Acquiring our pets

While 28% of dog owners and 48% of cat owners pay nothing up front for their pets, those who do purchase their pets are paying significantly more than they did three years ago – from an average of $548 to $627 for dogs, and an average of $274 to $308 for cats.

| Amount Paid | Dogs (n=1,013) | Cats (n=705) |
|---|---|---|
| Nothing / Free | 28% | 48% |
| Up to $200 | 16% | 28% |
| $201-$500 | 23% | 15% |
| $501-$1,000 | 18% | 6% |
| More than $1,000 | 15% | 3% |
| **Average** (excl. "nothing") | **$627** (n=741) | **$308** (n=496) |

*QC4, QD5. How much did you purchase [name] for?*

Since 2016, there has been a significant increase in the proportion of dog owners who paid more than $1,000 for their pet (up from 9% to 15%); indeed, this was the case for nearly a third (31%) of all dogs under the age of two. The average dog cost $627 at the time of purchase - with pure breeds at around $850, designer breeds at $765, and mixed breeds at $310. Dogs from breeders tend to have cost almost twice as much as those from pet shops ($940 vs. $510 on average), and almost four times as much as those from shelters ($260).

Similar trends have been observed among cats, with a significant rise in cats bought for more than $500 (from 5% to 9%). The average cat cost $308 at the time of acquisition - with pure breeds at around $570, designer breeds at $355, and mixed breeds at $175. Cats from breeders tend to have cost around $620 on average - over two-and-a-half times more than those from pet shops ($240) and four times as much as those from shelters ($155).

At the other end of the scale, free pets were most likely to have come from family, friends or neighbours - as well as adopting strays (particularly for cats) and from shelters (particularly for dogs).

## Buying a pet online

Animal Medicines Australia's *Pet Ownership in Australia 2016 Report* included a warning from the Australian Competition and Consumer Commission (ACCC) for prospective pet owners who were considering purchasing a pet online.

Since 2016, several jurisdictions have updated requirements for online sales or advertisements to include identification information, such as a microchip number for online sales of companion animals[1].

The Australian Veterinary Association has provided guidelines for the sale of pets online including some information important for pet owners to seek such as the unique microchip number, a recent picture and the medical history including the vaccination status[2].

For the first time in the study, owners of common animals other than dogs and cats were asked how much they had spent in the past year to 'replenish' their animals. While many reported no expenditure, an estimated $203 million was spent on new pets across these four categories.

| Cost of new animals in the past 12 months | Fish (n=213) | Birds (n=171) | Small mammals (n=42) | Reptiles (n=40) |
|---|---|---|---|---|
| Nothing | 45% | 67% | 63% | 67% |
| Less than $100 | 36% | 18% | 17% | 13% |
| $100 - $199 | 10% | 4% | 7% | 5% |
| $200 - $499 | 5% | 4% | 6% | 3% |
| More than $500 | 2% | 4% | 6% | 7% |
| Don't know | 2% | 3% | 2% | 6% |
| **Average** (excl. "nothing") | **$150** (n=113) | **$293** (n=52) | **-*** (n=16) | **-*** (n=10) |

**NB: Omitted due to small sample sizes.*
*QB1, QE3, QH6, QI6. In total, approximately how much has been spent on [new pets] in the past year?*

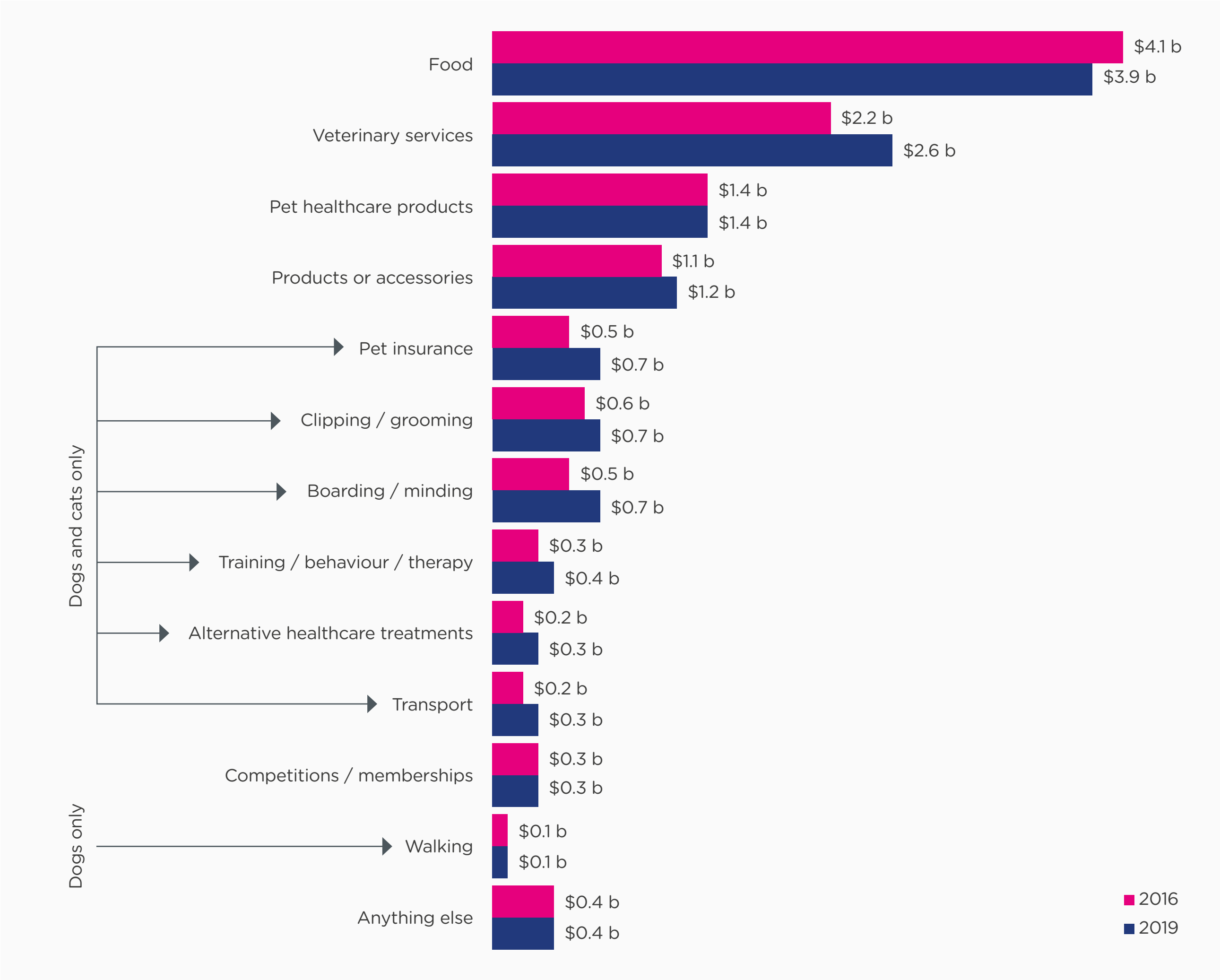
[1] NSW Office of Local Government, *Responsible pet ownership*, https://www.olg.nsw.gov.au/public/dogs-and-cats/responsible-pet-ownership-program and Victorian Department of Jobs, Precincts & Regions, Microchip numbers needed in pet sale advertisements, http://agriculture.vic.gov.au/pets/domestic-animal-businesses/breeding-and-rearing-businesses/microchip-numbers-needed-in-pet-sale-advertisements

[2] Vet Voice, *Buying pets online: what you see is not always what you get*, https://www.vetvoice.com.au/media-releases/buying-pets-online-what-you-see-is-not-always-what-you-get/

## On-going expenditure

Self-reported expenditure on pet-related products and services in Australia is now estimated at more than $13 billion a year, up from $12 billion in 2016. Food remains the standout, at 30% of all on-going expenditure. This is followed by vet services at 20% of people’s total spend, pet healthcare products at 11%, and products and accessories at 9%.

**Total expenditure by category ($ billions)***




**NB: Includes only expenditure on dogs, cats, fish, birds, small mammals and reptiles.*
*QB1, QC17, QD18, QE3, QH6, QI6. In total, approximately how much has been spent on each of these items in the past year for your [pet/s]?*
*Base: Pet owners (n=1,221)*

A significant proportion of the increase since 2016 has been driven by a reported uptick in spending on vet fees and pet insurance premiums - off-setting a reported decline in expenditure on food, and a flatlining in healthcare products (both categories now readily available through online retailers at competitive price points).

Indeed, pet insurance appears to have leap-frogged both minding and grooming services over the past three years to become the fifth largest category - perhaps speaking to the increasing premium we place on the welfare of our 'fur babies'. In a similar vein, alternative healthcare treatment fees appear to have overtaken spending on transport and competitions.

Examples provided by survey participants for the 'anything else' category tended to relate to toys, gifts, clothing and accessories, suggesting perhaps that the value of the products and accessories category may be over $1.2 billion.

| Average annual household spend, 2019 | Dogs | Cats | Fish | Birds | Small mammals | Reptiles | National total ($m) |
|---|---|---|---|---|---|---|---|
| Food | $586 | $491 | $125 | $224 | $226 | $160 | $3,949.9 |
| Veterinary services | $470 | $261 | $24 | $60 | $136 | $77 | $2,616.0 |
| Pet healthcare products | $224 | $147 | $60 | $88 | $96 | $72 | $1,422.6 |
| Products or accessories | $157 | $96 | $137 | $122 | $108 | $221 | $1,174.2 |
| Pet insurance | $147 | $69 | - | - | - | - | $744.5 |
| Clipping / grooming | $154 | $45 | - | - | - | - | $710.3 |
| Boarding / minding | $108 | $96 | - | - | - | - | $666.4 |
| Training / behaviour / therapy | $70 | $36 | - | - | - | - | $364.4 |
| Alternative healthcare treatments | $57 | $44 | - | - | - | - | $335.8 |
| Transport | $51 | $43 | - | - | - | - | $305.5 |
| Competitions / memberships | $35 | $29 | $26 | $29 | $20 | $64 | $281.6 |
| Walking | $37 | - | - | - | - | - | $144.1 |
| Anything else | $61 | $35 | $39 | $30 | $18 | $34 | $404.3 |
| **Average per household*** | **$2,158** | **$1,393** | **$411** | **$552** | **$605** | **$629** | |
| **Average per animal*** | **$1,627** | **$962** | **$38** | **$86** | **$254** | **$336** | |
| **National Total ($m)** | **$8,303.6** | **$3,624.2** | **$434.7** | **$478.9** | **$155.9** | **$122.3** | **$13,119.6** |

**NB: Averages presented in this table include those who spent nothing, for ease of extrapolation to the broader population. QB1, QC17, QD18, QE3, QH6, QI6. In total, approximately how much has been spent on each of these items in the past year for your [pet/s]? Base: Pet owners (n=1,221). Extrapolations based on survey data and ABS population and household estimates. See technical notes for further information.*

# Expenditure on food

Pet owners estimated that they're spending more than $3.9 billion on food each year - down 4% from 2016. While reported food expenditure has increased for dogs and - to a lesser extent - small mammals, this has been offset by reported declines in expenditure for the four other types of pets examined in this study - particularly cats (due to a combination of fewer total pet cats and lower expenditure on cat food per cat-owning household).

Expenditure on dog food accounts for approximately 57% of all pet food spend, valued at an estimated $2.3 billion - followed by cat food, accounting for 32% and valued at an estimated $1.3 billion. Both categories have experienced a decline on an average household expenditure basis - this shift in dog food sales appears to have simply been masked by an overall increase in the dog population.

The change in buying habits is not immediately apparent: 60% of dog owners and 70% of cat owners continue to source the majority of their pet food from the supermarket, on par with 2016 results.

However, when asked about all sources of pet food, a shift to online sources is clear, with one in ten dog and cat owners buying their pets' food online - including a significant uptick among cat owners, albeit from a low base (1% in 2016 to 5% in 2019).

This year, new options were also introduced to the survey, revealing that a quarter of dog owners and one in ten cat owners give their pets leftover human food, and 16% and 4% respectively make food specifically for their pets - particularly women and those in lower-income households. One in five dog owners also feed their pets from the butcher - though only 4% rely on the butcher as their main source of food.

Pet shops also remain popular among pet owners purchasing food for their pets, used at least sometimes by 36% of dog owners and 31% of cat owners. Indeed, owners of other types of pets tend to rely on pet shops as their primary source of food - though bird owners prefer supermarkets. Sizeable proportions of bird (26%), mammal (42%) and reptile (29%) owners also say they make or forage for food for their pets at least sometimes.

**Sources of food by pet type (%)**

| | Dog owners | | Cats owners | | Fish owners | | Birds owners | | Small mammals owners | | Reptiles owners | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | All sources | Primary source | All sources | Primary source | All sources | Primary source | All sources | Primary source | All sources | Primary source | All sources | Primary source |
| Supermarket | 74 | 60 | 84 | 70 | 40 | 32 | 55 | 47 | 45 | 35 | 8 | 5 |
| Pet shop/ Pet specialty store | 36 | 18 | 31 | 18 | 67 | 61 | 50 | 37 | 67 | 44 | 64 | 53 |
| I give them human food/ leftovers | 26 | 3 | 11 | 1 | 1 | 0 | 17 | 5 | 16 | 3 | 10 | 5 |
| Butcher | 19 | 4 | 6 | 1 | - | - | - | - | - | - | - | - |
| I make food at home | 16 | 6 | 4 | 0 | 2 | 2 | 6 | 2 | 13 | 8 | 10 | 7 |
| Vet | 10 | 2 | 12 | 4 | 1 | 0 | 4 | 2 | 12 | 5 | 5 | 3 |
| The internet/ online | 11 | 5 | 10 | 5 | 6 | 3 | 6 | 1 | 7 | 0 | 9 | 9 |
| I collect food from the wild | - | - | - | - | 3 | 1 | 9 | 1 | 27 | 2 | 12 | 9 |
| Other | 1 | 1 | 1 | 1 | 1 | 1 | 8 | 5 | 4 | 4 | 9 | 9 |
| *Sample n* | *806* | | *539* | | *213* | | *171* | | *42* | | *40* | |

*QB4, QC15, QD16, QE1, QH3, QI4. From which of these places have you bought/obtained [pet] food in the past 12 months?*
*QB5, QC16, QD17, QE2, QH4, QI5. Where do you get the majority of your [pet] food?*

## Quality Pet Food: What to look for

Australia has a voluntary standard for pet food developed by the Australian Veterinary Association, the RSPCA, the Pet Food Industry Association of Australia (PFIAA) and Standards Australia.

Under Standard AS5812, pet food labelling must include:

- the words "pet food only" and an illustration of the animal species the food is intended for;
- information about the protein and fat the food contains;
- information about whether the product is considered a "complete and balanced diet" or is intended as a treat or complimentary food;
- a feeding guide;
- a "best before", "use by" or packaging date depending on the nature of the food;
- an ingredients list in descending order (by weight); and
- the name and address of the company responsible for the product.

It is always important to seek the advice of a veterinarian if unsure about an individual pet's nutritional requirements.

A list of pet food manufacturers certified to the Australian Standard is available on the PFIAA website: www.pfiaa.com.au.

## Expenditure on products and accessories

The Australian market for other pet products and accessories has now reached an estimated $1.2 billion each year (compared to $1.1 billion in 2016). More than $600 million of this is attributed to dog owners, while another $250 million is being spent on cats - with items including food bowls, bedding, leads, litter trays, toys and clothing.

Pet shops and supermarkets remain important sources of pet products and accessories, with around a third of all pet owners selecting each as their primary retail outlet for this category. This is particularly true for rural households, who tend to rely more on supermarkets due to limited local choice, and older pet owners (Baby Boomers and Pre-Boomers).

However, pet shops appear to have decreased in popularity - though some of this may be due to the introduction of a new option in this year's survey, with 19% of pet owners choosing retail stores such as Kmart and The Reject Shop as their primary outlet. This was especially true for female pet owners, with 22% preferring such stores (vs. 15% of male owners). Indeed, some traditionally non-pet-focused retail stores appear to be recognising the lucrative market opportunity of pet owners and are now offering a wider range of products, increasing competition with pet stores and supermarkets.

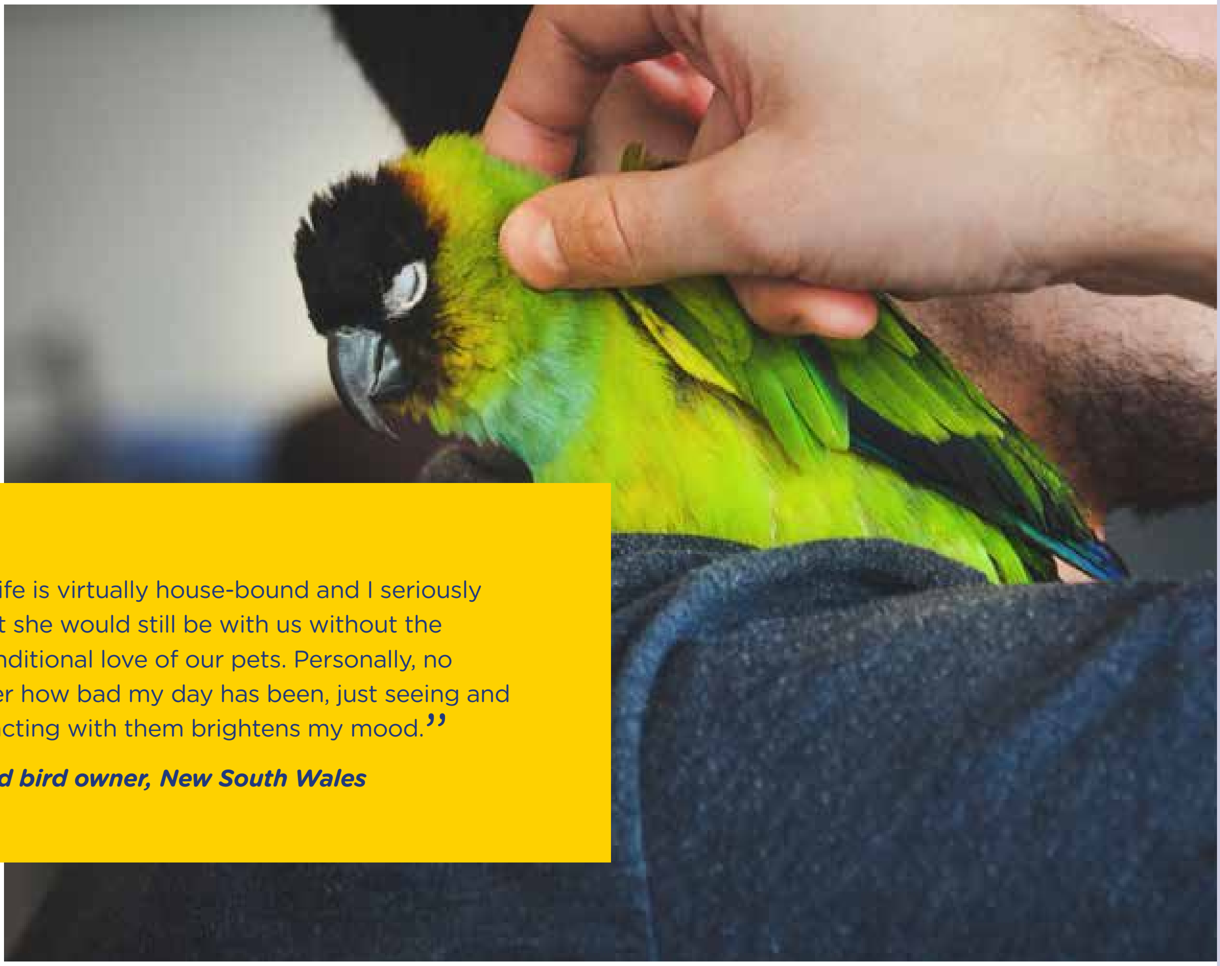
Meanwhile, there has also been a small but significant increase in the proportion of pet owners shopping online for products and accessories, from 7% to 9%[1]. Those who have migrated to Australia within the last decade are especially likely to prefer online retail – 16% vs. 9% of all other pet owners.

[1] In comparison, the ABS estimates all online retail trade increased as a proportion of total national retail turnover from 3.0% in January 2016 to 5.6% in January 2019 – though this aggregate of course accounts for a diverse number of industry sectors, including those where propensity for online purchasing remains limited. (Source: ABS Retail Trade, Australia, cat. no. 8501.0)

**Primary source of products and accessories (%)**

| | Dog owners | Cats owners | Fish owners | Birds owners | Small mammals owners | Reptiles owners |
|---|---|---|---|---|---|---|
| Pet shop/ Pet specialty store | 31 | 29 | 51 | 36 | 40 | 45 |
| Supermarket | 30 | 39 | 27 | 31 | 31 | 35 |
| Retail store | 22 | 18 | 11 | 19 | 15 | 10 |
| The internet/ online | 11 | 8 | 6 | 8 | 8 | 5 |
| Vet | 4 | 4 | 2 | 2 | 2 | 0 |
| Pharmacy | 1 | 0 | 1 | 1 | 2 | 3 |
| Other | 2 | 1 | 2 | 4 | 2 | 2 |
| *Sample n* | *806* | *539* | *213* | *171* | *51* | *41* |

*QF2. Where do you purchase the majority of your pet products and accessories (e.g. clothing, toys, leads, bowls, carriers)?*

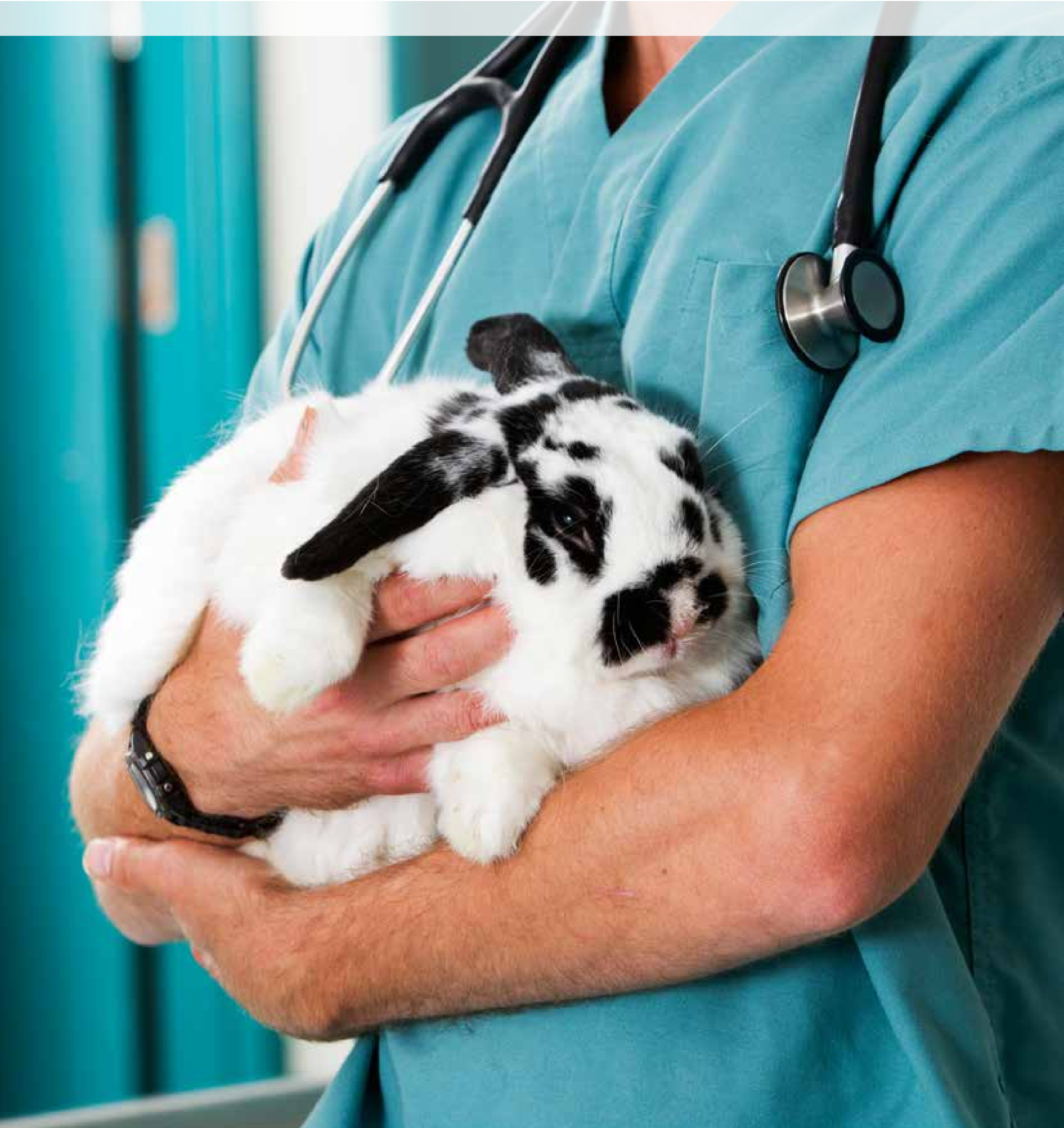


“My wife is virtually house-bound and I seriously doubt she would still be with us without the unconditional love of our pets. Personally, no matter how bad my day has been, just seeing and interacting with them brightens my mood.”

***Dog and bird owner, New South Wales***

# 5.

# Managing pet health



**Australians are now investing an estimated $2.6 billion a year - more than ever - on the health of their pets. Expenditure at veterinary clinics rose by 19% in the past three years, and spending on pet insurance boomed by 56% over the same period.**

## Expenditure with vets

After pet food, veterinary services account for the second largest category of on-going expenditure according to our survey participants. Australian pet owners are now reportedly spending more than $2.6 billion annually at the vet, up 19% - or some $414 million - since 2016.

| Total household expenditure on veterinary services | Dog Owners | Cat Owners | Fish Owners | Bird Owners | Small mammals Owners | Reptiles Owners | Total* |
|---|---|---|---|---|---|---|---|
| National total, 2019 ($m) | $1,810 m | $678 m | $25 m | $52 m | $35 m | $15 m | $2,616 m |
| Change since 2016 ($m) | + $439 m | - $51 m | - $4 m | + $7 m | + $16 m | + $6 m | + $414 m |
| Change since 2016 (%) | +32% | -7% | -12% | +15% | +79% | +73% | +19% |

**NB: Total estimate includes only the six types of pets listed here.*
*QB1, QC17, QD18, QE3, QH6, QI6. In total, approximately how much has been spent on [veterinary services] in the past year for your [pet/s]? Base: Pet owners (n=1,221). Extrapolations based on survey data and ABS population and household estimates. See technical notes for further information.*

This additional spending on veterinary services has been driven predominantly by dog owners - adding an additional $439 million to offset decreased spending reported by cat and fish owners.

This is due to a number of factors:

- In addition to an estimated increase in the pet dog population since 2016, the proportion of dogs visiting the vet has increased from 79% to 84%; and
- Among those dogs, the annual vet bill according to pet owners has increased from an average of $479 to $546.

| Average household expenditure on veterinary services | Dog Owners | Cat Owners | Fish Owners | Bird Owners | Small mammals Owners | Reptiles Owners |
|---|---|---|---|---|---|---|
| Visited a vet in the past year (%) | 84% | 68% | 13% | 27% | 41% | 28% |
| *^ Sample size for vet visits (n=)* | *n=806* | *n=539* | *n=213* | *n=171* | *n=42* | *n=40* |
| Average household spend among those who visited the vet ($) | $546 | $371 | $185 | $215 | $324 | $271 |
| *^ Sample size for vet spend (n=)* | *n=672* | *n=366* | *n=28 ** | *n=44* | *n=18 ** | *n=11 ** |

**NB: Low base sizes - results should be interpreted with caution. QB1, QC17, QD18, QE3, QH6, QI6. In total, approximately how much has been spent on [veterinary services] in the past year for your [pet/s]? Base: Pet owners (n=1,221). Extrapolations based on survey data and ABS population and household estimates. See technical notes for further information.*

## The role of vets

Overall, 84% of dog owners and 68% of cat owners say they have taken their pet to a vet in the past 12 months - with attendance rates falling to 41% for small mammals, 28% for reptiles and 27% for birds. In addition, 13% of aquarists also consulted a vet about their fish.

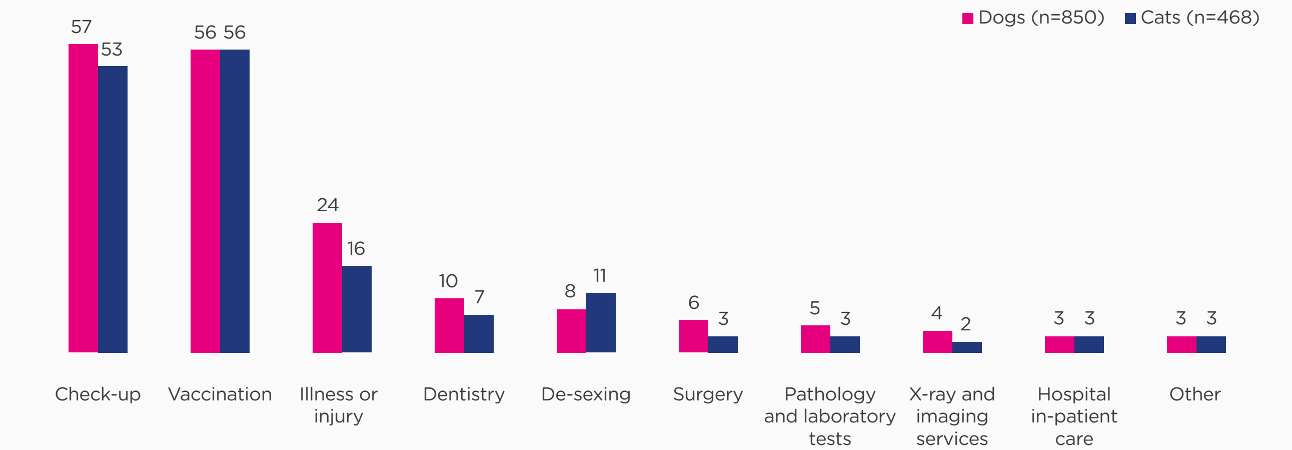
Across all animal types, attendance rates are linked to financial factors. Higher-income households and employed pet owners remain more likely to take their animals to the vet.

There are also indications that pet owners who are younger, male or from CALD backgrounds may be more likely to take their animals to the vet, especially less common pets such as fish and reptiles; however, these findings are based on small sample sizes within the survey, with further investigation required.

Dog and cat owners who visit the vet are going multiple times a year - averaging 2.1 visits per dog and 1.7 per cat. The most common reasons tended to be check-ups and vaccinations, followed by general illness or injury, de-sexing and dentistry.

Reported reasons for visits have remained largely consistent over the past three years, with a few notable increases, including dogs being taken in for general illness or injury (up from 20% to 24%), dentistry (up from 6% to 10%) or surgery (up from 3% to 6%), and cats being vaccinated (up from 47% to 56%).

**Reasons for visits to the vet, past 12 months (%)**

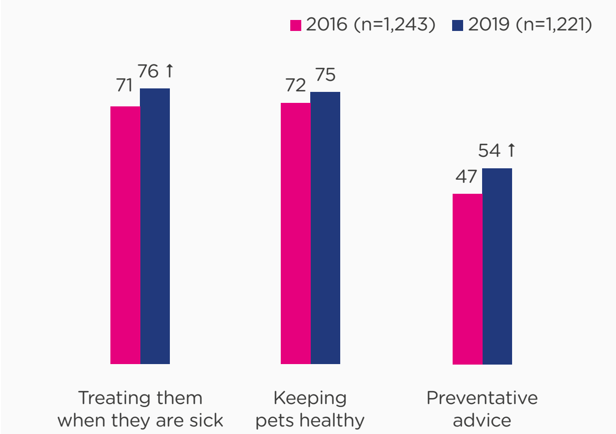



*QC14, QD15. What was the reason for the visit/s?*

When asked about the role of vets, pet owners tend to agree that they mostly think of their vet when their pets are sick (76%) or to keep pets healthy (75%). This is largely consistent with 2016 findings, though more are "treating them when they are sick" – up from 71%.

Around 54% of pet owners agree that vets provide preventative advice - up from 47% in 2016. Baby Boomers in particular are more likely to agree with this (62%), while inner-city dwellers were less likely (46%).

**Perceived role of vets (%)**




*QF1. What do you see as the role of vets? Base: Pet owners (n=1,221).*

A very small number of participants wrote in additional responses, with several relating to perceptions that vets are too expensive, price-gouge or do not deliver value for money. The Australian Veterinary Association notes that veterinary fees can feel expensive when compared with the cost of human healthcare, which is typically subsidised by governments and private health insurance; further, veterinarians fulfil specialist roles beyond that of a 'pet GP' – acting as a pet's surgeon, radiologist, dermatologist, neurologist, psychiatrist, oncologist and pharmacist[1]. This sentiment among some pet owners may be a worthwhile area of further exploration.

Interestingly, despite varying rates of vet *attendance* by animal type, there were no significant differences in perceptions of the role of vets among owners.

## Expenditure on healthcare products

Pet healthcare products such as flea treatments and dietary supplements account for 11% of all on-going spending by pet owners - representing an estimated $1.4 billion in sales in 2019, on par with 2016 in nominal terms.

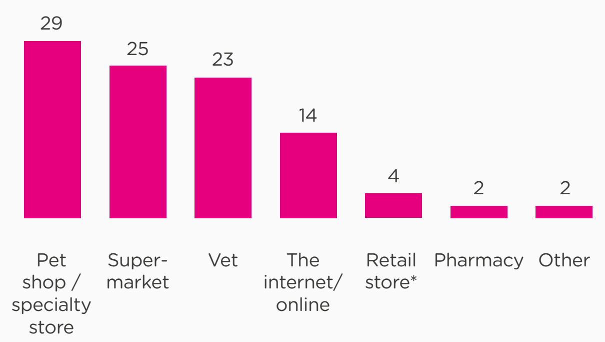
This has been led by a reported decline in spend by cat owners in particular, with falls also among dog and reptile owners.

However, this estimated $45 million decline in healthcare product spending by owners of dogs, cats and reptiles has been offset by an estimated $43 million uptick in spending by owners of birds, fish and small mammals.

There has been no significant change in *where* pet healthcare products are bought, with pet shops and specialty stores remaining the most popular (29%). This was followed by supermarkets (25%), vets (23%) and general retail stores (4% - rising to 10% for those living in inner city areas).

The proportion of households buying the majority of their pet healthcare products online has also remained steady, at 14%. Online purchases are especially popular among pet owners who are Gen X (18%) or female (17%). Consistent with previous years, the most common online purchases in this category were treatments for fleas, worms and ticks.

**Source of majority of pet healthcare products (%)**




*QF3. Where do you purchase the majority of your pet healthcare products (e.g. flea/tick/worming treatments, dietary supplements)? Base: Pet owners (n=1,221).*

Meanwhile, Gen Z pet owners and those non-CALD backgrounds are more likely than others to buy healthcare products from the vet - at 35% and 26%, respectively.

| Items purchased online (n=173) | % |
|---|---|
| Flea treatments | 82% |
| Worming treatments | 76% |
| Tick treatments | 59% |
| Dietary supplements | 14% |
| Other | 5% |
| NET | 100% |

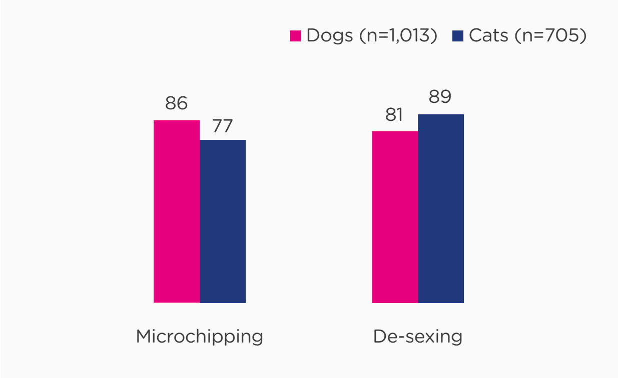
*QF5. What pet healthcare products do you buy online? Base: Pet owners (n=1,221).*

Protecting your pet from parasites such as ticks, fleas, heartworm, lungworm or intestinal worms might require more than one product. It is important to consult your veterinarian to ensure products can be safely used together. A veterinarian can also provide advice specifically for the size of your pet and for the local environment. In Australia, animal medicines are assessed by the Australian Pesticides and Veterinary Medicines Authority to ensure they are effective and safe for use.

[1] Vet Voice, *Frequently asked questions about the cost of veterinary health care*, https://www.vetvoice.com.au/ec/pet-ownership/cost-of-veterinary-health-care/

# De-sexing and microchipping

**Rates of micro-chipping and de-sexing (%)**




*QC5, QD6. Has [name] been de-sexed? QC6, QD7. Has [name] been micro-chipped?*

## De-sexing

The proportion of dogs that are de-sexed has increased slightly from 77% in 2016 to 81%, while for cats this has remained unchanged at 89%.

De-sexing an animal before it is sold or given away is compulsory in some states – including for cats in Western Australia[1], and both cats and dogs in South Australia[2] and the Australian Capital Territory[3] – while Queensland, New South Wales and Victoria encourage pet owners to de-sex their pets. Some jurisdictions offer discounted registration if a pet has been de-sexed.

The RSPCA and almost all animal shelters have a policy of de-sexing animals before they are re-homed. For kittens and puppies, this usually occurs at eight weeks of age. These policies, coupled with education programs about the benefits of de-sexing aimed at pet owners (for example those run by animal shelters and local councils), appear to be having a positive impact on the number of abandoned animals. Over the six years since the first Animal Medicines Australia report, both the number and proportion of animals euthanised by the RSPCA has continued to decline steadily – from 49,688 or 38% in 2011-12 to 36,838 or 28% in 2017-18[4].

The Australian Veterinary Association (AVA) also supports the de-sexing of companion animals. The health and behavioural benefits of de-sexing dogs and cats are well documented and include the following:

### Health benefits

- De-sexed animals generally live longer, healthier lives;
- Reduced risk of cancer and other diseases affecting the reproductive organs; and
- Reductions in the frequency of pregnancy and therefore the need to raise litters which can cause exhaustion in female cats and dogs.

### Behavioural benefits

- Less likely to run away, wander, get into fights or get injured;
- Reduced territorial behaviour such as spraying and marking territory;
- Less likely to suffer from anti-social behaviour;
- Eliminates the 'urge to mount' peoples' legs in male dogs;
- Eliminates the 'heat' cycle in female cats and therefore their efforts get out and roam for a mate; and
- Can make them more affectionate, which means they are better companions.

### Cost benefits

- Reduces the huge community cost associated with caring for and re-homing unwanted animals;
- The financial impost of de-sexing is minimal (ranges from $115 to $500 depending on the type of animal, gender, size and age[5]) when compared to the cost of a lifetime of feeding, veterinary bills and care for offspring;
- Lower ongoing costs, as most registration fees are less for de-sexed animals; and
- Reduced cost of treating animals injured during fights.

[1] Western Australian Department of Local Government, Sport & Cultural Industries, *Cats and dogs*, https://www.dlgsc.wa.gov.au/local-government/community/cats-and-dogs
[2] South Australian Department for Environment & Water, *Your guide to South Australia's new dog and cat desexing laws*, https://www.environment.sa.gov.au/goodliving/posts/2018/02/desexing-pets
[3] Transport Canberra & City Services, *Animal management within the Act*, https://www.tccs.act.gov.au/city-living/pets/dogs/your-responsibilities#desexing
[4] RSPCA Australia, *Annual Statistics 2017-18*, https://www.rspca.org.au/sites/default/files/RSPCA%20Australia%20Annual%20Statistics%202017-2018.pdf
[5] RSPCA Australia, *Costs*, https://www.rspcansw.org.au/learn/owning-a-pet/costs

## Microchipping

Microchipping rates have remained steady over the past three years for both dogs and cats, at 86% and 77%, respectively.

Microchipping is mandated in most states and territories and across local government areas, and is usually a requirement for registration of pets. (There are exemptions to this where a veterinarian has determined the procedure may pose an undue risk to the health or welfare of an animal.)

The following summary provides examples of requirements by different states and territories. This information is general in nature and specific, up-to-date details should be sought from relevant state, territory or local government authorities.

- In New South Wales, under the *Companion Animal Act 1998*, all dogs and cats must be microchipped at the point of sale, change of ownership or by 12 weeks of age – whichever occurs first[1].
- In Victoria, the *Domestic Animals Act 1994* requires that all dogs and cats be microchipped as a condition of pet registration, which is compulsory once they are three months old[2].
- In Queensland, dogs and cats born after 10 April 2009 are required to be microchipped prior to sale or transfer – regardless of age and before they are 12 weeks old[3].
- In Western Australia, local governments are given the power to administer and enforce the *Cat Act 2011* including identification, registrations and sterilisation[4], and dogs are required to be microchipped by three months of age[5].
- Dogs and cats in South Australia have been required to be microchipped from 1 July 2019 at the point of sale or by 12 weeks of age[6].
- In Tasmania, under the *Cat Management Act 2009*, all cats sold or given away must be microchipped unless a veterinary surgeon issues an exemption certificate based on health or welfare concerns[7], and dogs over six months must be microchipped[8].
- In the Australian Capital Territory, cats and dogs must be microchipped – however only dogs are required to be registered[9].
- In the Northern Territory, the City of Darwin requires microchipping as a condition for registration[10].

[1] NSW Office of Local Government, *Microchipping and registration,* https://www.olg.nsw.gov.au/content/microchipping-and-registration
[2] Victorian Department of Jobs, Precincts & Regions, *Microchipping information for dog and cat owners*, http://agriculture.vic.gov.au/pets/registration-legislation-and-permits/microchipping-of-dogs-cats-and-horses/microchipping-information-for-dog-and-cat-owners
[3] Queensland Government, *Laws for pet owners in Queensland*, https://www.qld.gov.au/families/government/pets/pet-laws
[4] WA Department of Local Government, Sport & Cultural Industries, *Cats and dogs*, https://www.dlgsc.wa.gov.au/local-government/community/cats-and-dogs
[5] WA Government, *Dog microchips compulsory from 1 November 2015*, https://dlgc.communities.wa.gov.au/News/Pages/DLGCNewsArticle38.aspx
[6] South Australian Department for Environment & Water, *Understand SA's new pet microchipping laws*, https://www.environment.sa.gov.au/goodliving/posts/2018/03/microchipping-pets
[7] Tasmanian Department of Primary Industries, Parks, Water & Environment, *Information for cat owners*, https://dpipwe.tas.gov.au/invasive-species/cat-management-in-tasmania/information-for-cat-owners
[8] Tasmanian Department of Premier & Cabinet, *Microchipping FAQs*, http://www.dpac.tas.gov.au/divisions/local_government/legislation/dog_control/micro-chipping_faqs
[9] Access Canberra, *Pets and wildlife*, https://www.accesscanberra.act.gov.au/app/home/petsandwildlife
[10] City of Darwin, *Pet registration and microchipping*, https://www.darwin.nt.gov.au/live/pets-wildlife/great-pets-start-with-you/pet-registration-microchipping

# Pet insurance

Australians now report spending nearly $745 million on pet insurance for their dogs and cats, up a sharp 56% in three years. Note that these results are extrapolated from spend recall by pet owners, and may not align exactly with industry premiums data – though these findings may prove a useful indication of the assumed cost of insurance in pet owners' minds.

The self-reported rate of pet insurance remains unchanged, at 30% among dog owners and 21% among cat owners.

However, the average premium reported by dog owners has increased, from $421 to $525 per household; per dog, this equates to $302 in 2019 - up 31% from 2016.

The average premium reported by cat owners has held relatively steady, from $352 in 2016 to $358 per household - equating to $231 per cat, up 7% in three years.

| Average household expenditure on pet insurance | Dogs Owners | Cats Owners |
|---|---|---|
| Households that have pet insurance (%) | 30% | 21% |
| *^ Sample size for insured households (n=)* | *n=806* | *n=539* |
| Average premium among those with insurance ($) | $525 | $358 |
| *^ Sample size for insurance premiums (n=)* | *n=218* | *n=102* |

*QC17, QD18. In total, approximately how much has been spent on [pet insurance] in the past year for your [pet]/s?*

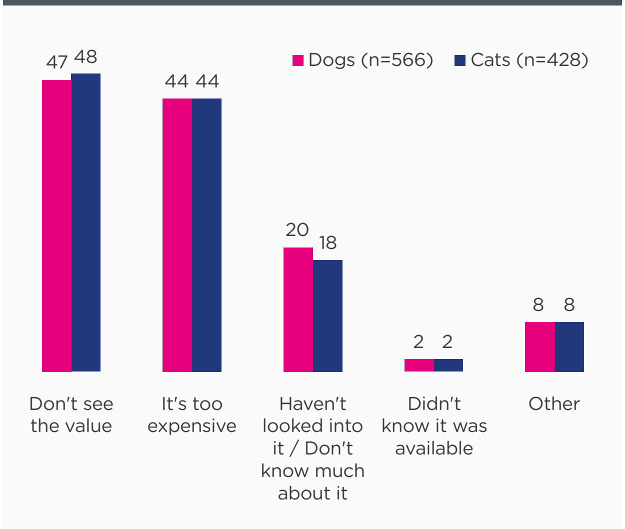
The propensity to insure dogs appears to be linked to:

- Cultural and linguistic background (56% vs. 25% of those without CALD characteristics);
- Household location (53% insurance among those living in inner city areas, falling to 14% among rural households);
- Age (42% of Gen Z and Y vs. 21% of older generations);
- Employment status (35% of those employed vs. 22% rest of population); and
- Household income (34% of those earning $50,000 or more vs. 18% of those on lower incomes).

Similar differences were observed among cat-owning households.

Reasons for non-insurance have remained consistent over time, with nearly half of dog and cat owners questioning the value or cost. Around one in five said they haven't given it much thought, while only a tiny fraction said they weren't aware of pet insurance.

**Reasons for not taking out insurance (%)**




*QC19, QD20. For what reason have you not bought pet insurance for your cat/s in the last 12 months?*

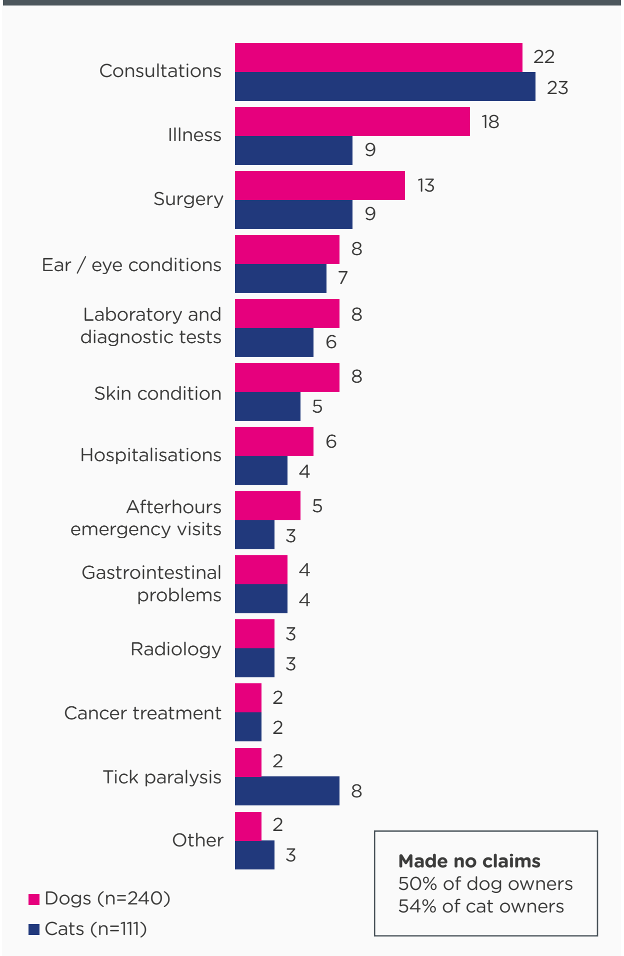
Around 8% also reported 'other' reasons, primarily relating to exclusions or limited coverage (e.g. due to old age).

Differences by type of pet owner:

- Dog owners in inner-city areas are more likely than others to say they haven't given insurance much thought (34%).
- Unsurprisingly those on lower incomes are more likely to say pet insurance is too expensive (57% of households earning less than $50,000).
- Gen Z dog owners were also likely to say they haven't given insurance much thought (39%) or that they didn't know it was available (7%).
- Similar differences were observed in the reasons given by cat owners.

Around half of all insured dog and cat owners have not made a claim; for the other half, general consultations were the most common item. Dog owners were more likely than cat owners to have claimed against several common items, including illness and surgery, while cat owners were more likely to have made a claim for tick paralysis.

**Insurance items claimed within past 12 months (%)**

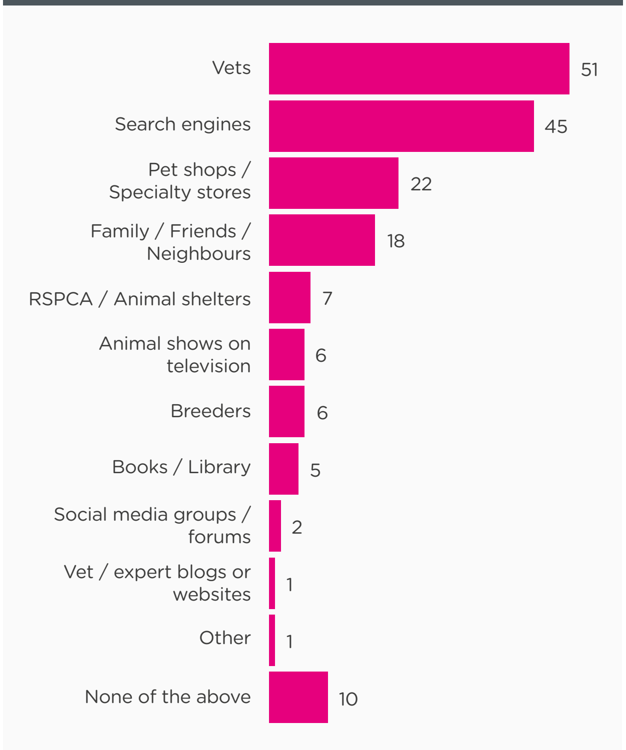



*QC25, QD26. Which of the following items have you claimed against your pet insurance in the last 12 months?*

## Information sources

Vets remain the most popular source of pet-related information, cited by 51% of pet owners. This was followed closely by searching for information online (45%) and - to a lesser degree - turning to pet shops (22%) and word-of-mouth advice from family, friends and neighbours (18%).

**Sources of information used for pet-related issues (%)**




*QF14. Which of the following sources of information do you mainly use for pet-related issues? [Select up to three]. Base: Pet owners (n=1,221).*

Differences by type of pet owner:

- Male pet owners and those living in inner-city areas are less likely to call on vets for advice (only 47% and 42%, respectively).
- Gen X pet owners and those with at least one parent born overseas are more likely than others to turn to search engines (both at 52%).
- Solo households and Gen Z pet owners are more likely than others to turn to animal shelters and rescue organisations such as the RSPCA (both at 13%).

Vets and search engines are the top two information sources regardless of the type of pet owned. However, dog owners are more likely to turn to vets for information (54%), while the opposite is true for fish owners (only 40%); instead, they are more likely than others to seek advice from pet shops (33%). Meanwhile, bird owners are more likely to turn to breeders (10%), books (9%) and social media forums (3%).

The proliferation of online resources has allowed pet owners to seek out relevant niche forums and other sources of advice, with examples provided by survey participants focusing on specific breeds (e.g. groodles or rainbow lorikeets) or issues (e.g. anxious dogs).

# 6.

# Community benefits

**For most Australian households, their pets are much loved companions, but the role of pets in our community goes far beyond providing company.**

**Increasingly, pets are being recognised for the positive impact they have on our physical and mental health, and for the roles they play in providing safety and security where it is needed most.**

## Beyond ownership

Pet owners surveyed for this report are in no doubt about the important role pets play in our lives. The bond between animals and their owners remains strong.

Across Australia, there is increasing evidence demonstrating that positive relationships with animals – as pets, companion or assistance animals, or as work colleagues - benefits our physical, mental and social health and wellbeing. In our legal systems, our schools and in our social services, animals are providing a calming and caring presence.

In Victoria, the Office of Public Prosecutions is using the calming influence of highly trained Trauma Support Dogs[1]. Witnesses and victims report the support dogs make it easier for victims and witnesses to provide evidence relating to traumatic events. Prison dog programs, operating in different forms throughout Australia, have been described as a "promising rehabilitative intervention" with opportunities for giving back and for developing "social, emotional and vocational skills"[2].

Across Australia, in 284 schools, the Story Dogs program is helping to improve children's literacy by providing a sympathetic ear for reading practice, with positive feedback from students, teachers and parents[3].

Dogs have also been found to assist people with intellectual disabilities build stronger community connections. A 2018 study of a visiting dog walking program for people with intellectual disabilities in supported living[4] found that dog walking "has the potential to encourage convivial encounters, which in the long term could be catalysts to help people with intellectual disabilities build social connections in their communities".

[1] ABC Radio National Law Report, The dog helping survivors give harrowing evidence, https://www.abc.net.au/radionational/programs/lawreport/the-dog-helping-survivors-give-harrowing-evidence/11221362
[2] University of New England, Humby, Lauren, Pawsitive Solutions – the symbiotic relationship between prisoners and dogs, https://hdl.handle.net/1959.11/22600
[3] Courier Mail, Story Dogs help unleash kids' hidden readability, https://www.couriermail.com.au/news/queensland/story-dogs-help-unleash-kids-hidden-readability/news-story/b3b483938e2229891e696c1fef9890e1
[4] Bould, E, Bigby, C, Bennett, PC & Howell, TJ (2018), *'More people talk to you when you have a dog' – dogs as catalysts for social inclusion of people with intellectual disabilities, Journal of Intellectual Disability Research,* https://www.researchgate.net/publication/327111020_'More_people_talk_to_you_when_you_have_a_dog'-dogs_as_catalysts_for_social_inclusion_of_people_with_intellectual_disabilities

It is not just dogs making a difference to people's lives. In the NSW Illawarra region, Marco Polo Aged Care Services have cited the benefits to residents from therapy animals including visits from Bushman the Therapy Horse[1] and registered charity Animals For All Care facilitates visits by dogs in animal shelters with retirement home residents[2].

More broadly, the benefits of companion animals have been considered by a number of studies including the US National Poll on Healthy Aging conducted by the University of Michigan which found that having a pet assisted older people with emotional and physical health, including pain[3].

"She has made my life better. She brings joy, companionship, warmth, and a whole bunch of other positives. Not to mention, sometimes during my negative health spirals, the only reason I got up in the morning is because I knew I had this innocent creature who was dependent on me."

***Cat owner, Queensland***

## Providing support, security and safety

Domestic animals also make a considerable contribution to our economy, working alongside us on farms, protecting our valuable produce from biosecurity threats, with emergency services in search and rescue, and in the Australian Defence Force.

There are now more than 270,000 stock-herding dogs working across rural Australia[4]. While most cost between $300 and $700 to purchase, their value on Australian farms can be seen in the recent record sale of kelpie 'Eveready Possum' for $25,000 in February 2019[5], approaching world record levels. While that seems a lot of money, a Farm Dog Survey undertaken by the University of Sydney in 2013, found that herding dogs typically cost around $7,700 over their lifespan, but provide their owners with about $40,000 worth of work[6].

Beyond the farm gate, dogs also play a key role in biosecurity. At Australia's entry points around 60 Department of Agriculture detector dogs work to find items that could bring pests or disease into the country[7] while Australian Border Force dogs work to detect money, drugs, firearms, tobacco and explosives[8].

The NSW Police Dog Unit dog teams (with similar functions operating in other jurisdictions) provide specialty support to police at high risk confrontations and for crowd control, urban search and rescue disasters, and drug detection and firearms/explosives detection[9].

Military working dogs, along with their handlers, provide additional security, detection, tracking and early warning in the Royal Australian Air Force and in the Australian Army on military bases in Australia and in deployed locations[10,11].

1 Marco Polo Aged Care Services, Bringing The Outside In - Horse Therapy, https://www.marcopolo.org.au/blog/bringing-the-outside-in-horse-therapy
2 ABC 730, Dogs transforming lives in retirement homes, https://www.abc.net.au/7.30/dogs-transforming-lives-in-retirement-homes/11280106
3 University of Michigan, National Poll on Healthy Aging, https://deepblue.lib.umich.edu/bitstream/handle/2027.42/148428/NPHA_Pets-Report_FINAL-040319.pdf
4 ABC News, Working dogs: The history and value of an "indispensable" Australian icon, https://www.abc.net.au/news/2019-06-26/working-dogs-history-of-an-aussie-icon/11096742
5 Beef Central, Jerilderie sets national working dog sale mark at $25,000, https://www.beefcentral.com/news/jerilderie-sets-national-working-dog-sale-mark-at-25000/
6 ABC News, Farm dogs worth $40,000 for a lifetime of mustering, https://www.abc.net.au/news/rural/2013-11-05/value-of-working-dog/5069616
7 Australian Government Department of Agriculture, Detector Dogs, http://www.agriculture.gov.au/biosecurity/australia/detector-dogs
8 Australian Border Force, Detector Dog Program, https://www.abf.gov.au/about-us/what-we-do/border-protection/detector-dogs/training
9 NSW Police, Dog Unit, https://www.police.nsw.gov.au/about_us/organisational_structure/units/dog_unit/role
10 Australian Air Force, Military Working Dogs, https://www.airforce.gov.au/technology/combat-support-capability/military-working-dogs
11 Australian Army, Special operations military dogs, https://www.army.gov.au/our-people/units/special-operations-command/special-operations-military-working-dogs

## Policy reform since 2016

Since the release of the Pet Ownership in Australia report in 2016, a number of jurisdictions have made changes to the regulation of pet ownership, particularly in relation to rental properties.

While agreement is often still required by the landlord, there is a move towards requiring reasons for not permitting an appropriate pet in rental accommodation, rather than the default position being that pets are not allowed[1]. In reforms passed last year in Victoria, every tenant has the right to keep a pet. While still subject to a landlord's permission, the new laws make it much harder to refuse a pet, with tenants having new right to appeal a negative decision. Similar laws are expected to be introduced this year in Queensland.

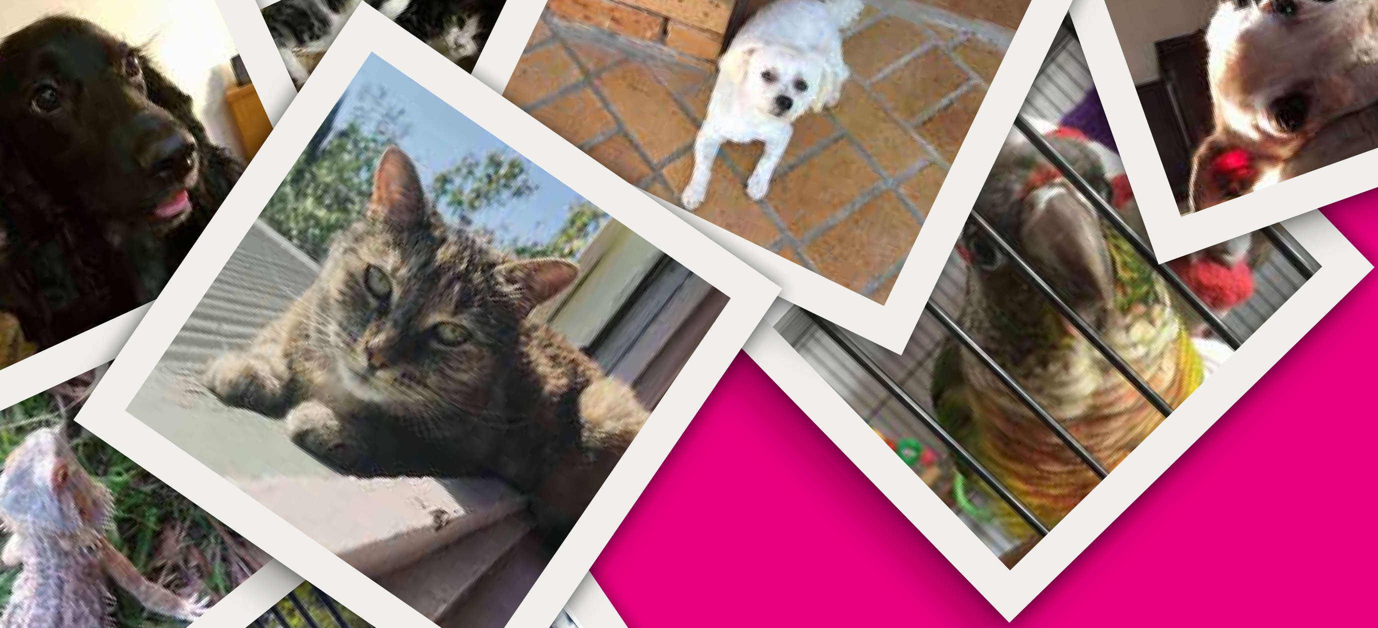
For property owners, there has also been acknowledgment that allowing pets may increase the value of a strata property. In some cases, being 'pet friendly' can increase property value by 10%[2] and rental return by 30%[3].

Legislators are also moving on reforms to ensure the safe and appropriate breeding of companion animals. New regulations have been introduced in Victoria[4] in relation to ethical breeding practices, however leaders in the pet industry remain concerned about online 'black markets' for pets. In NSW the advertisement of kittens, cats, puppies of dogs must now include an identification number such as a microchip or breeder identification number[5].

Despite these changes, regulations associated with pets and pet industries vary significantly between Australia's states and territories. Efforts to improve consistency on pet industry regulation may enhance opportunities for improved services and greater pursuit of pet ownership benefits.

Animal Medicines Australia (AMA), as the peak body representing the leading animal health companies in Australia, will continue to work with industry, governments, the community and others to continue to understand and promote the benefits of pet ownership and the important relationships between pets and their owners.

1 Domain, How to rent if you have pets: A state-by-state breakdown of rules for landlords and tenants, https://www.domain.com.au/advice/how-to-rent-if-you-have-pets-a-state-by-state-breakdown-of-rules-for-landlords-andtenants-806193/
2 RealEstate.com.au, "Pet-friendly" adds value to homes for buyers and sellers, https://www.realestate.com.au/news/petfriendly-adds-value-to-homes-for-buyers-and-sellers/
3 Domain, Landlords who allow pets could boost their rental return by up to 30 per cent, https://www.domain.com.au/advice/landlords-who-allow-pets-could-boost-their-rental-return-by-up-to-30-per-cent-833532/
4 Agriculture Victoria, Puppy farm legislation, http://agriculture.vic.gov.au/pets/puppy-farm-legislation
5 NSW Department of Primary Industries, Selling or giving away a cat or dog, https://www.dpi.nsw.gov.au/animals-and-livestock/animal-welfare/companion-animal-welfare/selling-or-giving-away-a-cat-or-dog



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