



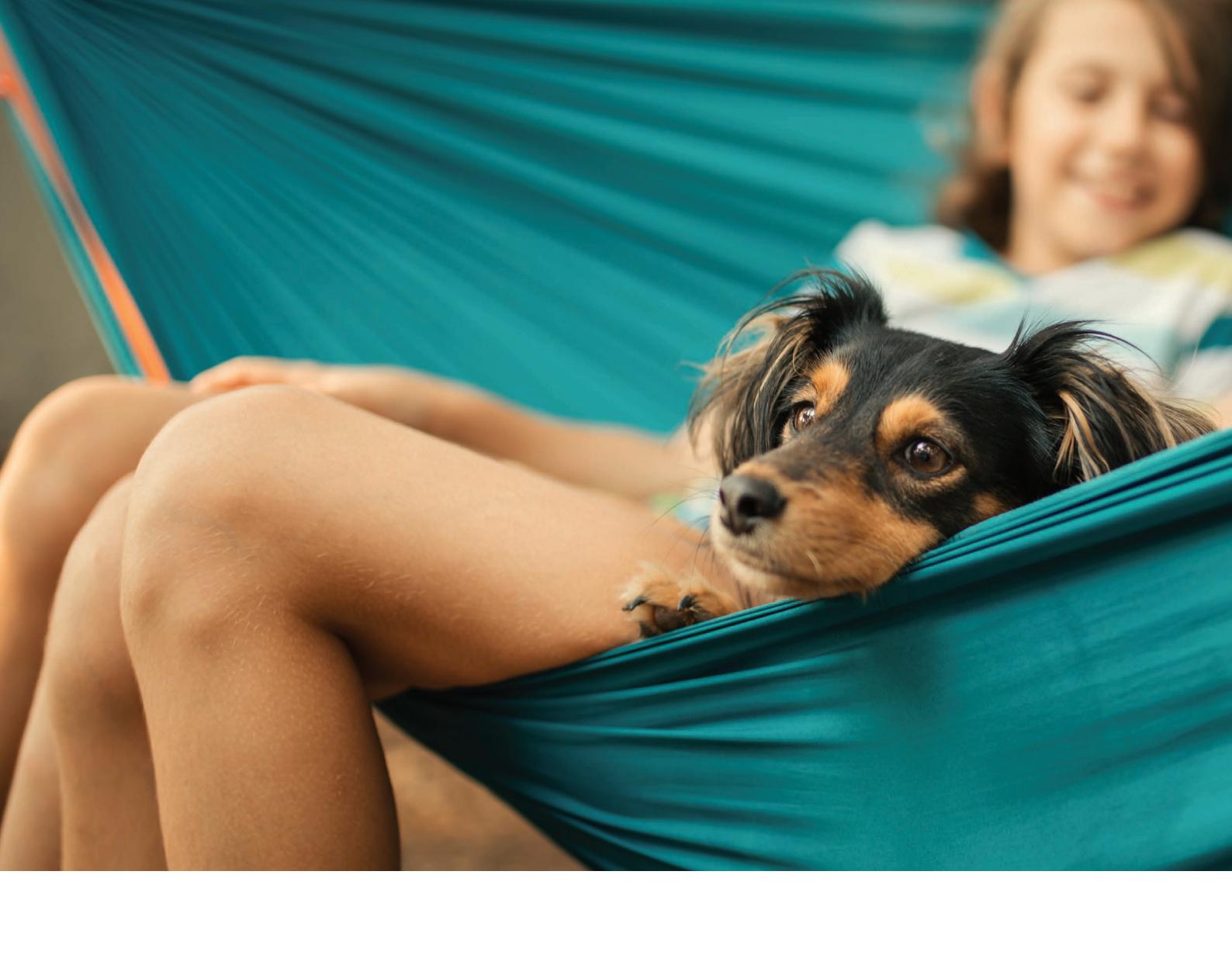
Animal
Medicines
Australia

Animal Medicines Australia
Representing the best in animal health

Pets in Australia:

A national survey of pets and people





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Animal
Medicines
Australia

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, with this triennial report part of that work.

Our members



Acknowledgements

Animal Medicines Australia thanks and acknowledges the Australian Veterinary Association and the Pet Food Industry Association of Australia for contributing to this report.



Message from the President

Our pets form an important component of most Australians' lives. Whether for companionship, assistance, teaching responsibility, or the associated physical and mental health benefits, our relationship with our pets continues to change and evolve.

The animal health industry is committed to supporting enduring, rewarding and sustainable pet ownership experiences. We create and supply animal health products that prevent and treat illness, injury and disease. Our products and technologies promote life-long bonds between pets and their owners and support responsible pet ownership practices.

To ensure that as many Australians as possible can access the myriad benefits associated with pet ownership, we seek a policy environment that facilitates responsible pet ownership practices. This could be achieved by improving strata laws, providing support for vulnerable pet owners, or through greater national consistency in companion animal policy settings. This research is intended to inform thoughtful decision-making by governments, policymakers and others when considering issues that impact Australia's estimated 28.7 million pets in 6.9 million households.

From 2020 to 2022, pet ownership reached new heights in Australia as new owners took advantage of the opportunity afforded by flexible work from requirements imposed by the COVID-19 pandemic. As our community emerges from the pandemic, new pressures and challenges are also emerging. Natural disasters, increasing living costs, inflation, access to housing and other issues are placing pressure on many pet owners. In some circumstances, this can lead to difficult decisions to find alternate care arrangements for a beloved pet.

By better understanding the experiences of pet owners, ownership drivers and challenges governments and industries can create better, more responsive systems and processes to support pet owners and promote enduring, positive, responsible and beneficial pet ownership experiences.



Lance Williams
President

Animal Medicines Australia





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Research methodology

Notes to the reader

This study was conducted online among a representative sample of Australian adults. Questionnaires from previous surveys in 2013, 2016 and 2019, along with a special pandemic-focussed 2021 edition, were updated to address emerging issues for Animal Medicines Australia and its stakeholders.

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 the commentary are not presented as full datasets; rather, they represent only results that 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 to enhance data accuracy.

Any statistically significant differences reported are at the 95% confidence level and noted using arrows ($\uparrow\downarrow$) 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

Fieldwork: The primary quantitative research informing this report was administered online from 6-26 July 2022 by the accredited fieldwork agency Cint, using participants drawn from professional research panels. Quotas were set using population data from the Australian Bureau of Statistics' (ABS) Census by place of residence, as well as gender interlocked with age - ensuring a representative sample of the adult population.

Sampling: This survey included boosted samples for Western Australia and South Australia to improve the robustness of findings at the state level. The total sample size was n=2,453, resulting in an excellent overall maximum error margin of +/-2.0% at the 95% confidence level; please note the error margins are larger for sub-groups. Survey results were weighted using ABS Census data to correct any sampling bias.

Weighting: Given most findings were related to household characteristics, weights were applied by household location interlocked with household size. For findings relating to individual attitudes and behaviours, weights were applied by place of residence and gender interlocked with age.

Stacking: Most results for dogs and cats have been re-based on the total number of animals rather than the number of owners. These results have been weighted by household data from the ABS Census, as outlined above. 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) for 2022 – placing the estimated number of households nationally at 10.1 million under a medium-growth scenario, the total population at 25.8 million, and the number of adults at 20.1 million. Note these are estimates only and should not be considered definitive quantification of total pet populations or sales data.

Refinements: Note there may be slight variances in some previously published results from earlier research due to methodology refinements. Where numerical responses were entered directly, averages were derived with extreme outliers removed; where participants have selected from a pre-defined list of ranges, averages were derived by taking the mid-point of each range along with the absolute upper bound. Further, participants who gave inconsistent responses to questions about pet food expenditure were omitted from the expenditure analysis.

Comparisons: In line with previous triennial reports, this report has focused primarily on comparing results between the 2022 and 2019 surveys - exploring differences in pet ownership before and after the COVID-19 pandemic. Where relevant, comparisons have also been made between the 2022 survey and the shorter 2021 pandemic survey - highlighting differences in pet ownership over the last 12 months.

Quality: This research was conducted per the international quality standard for market and social research (ISO 20252) and the Australian Polling Council Quality Mark standards; a methodology disclosure statement appears at the end of the report.



Top insights



After the pandemic pet boom, Australia's pet population is estimated to be 28.7 million - with 6.9 million households having a pet today.

This equates to 69% of all households - significantly higher than the consistent 61% recorded in 2016 and 2019, before the pandemic. However, the result is also on par with our 2021 *Pets and the Pandemic* findings - suggesting the pandemic pet ownership boom has plateaued into a 'new normal'.

The love Australians feel for their pets has remained strong despite a global pandemic and economic uncertainty, with 85% of owners saying their pets have positively impacted their lives.

Many continue to point to pet ownership's emotional, social and health benefits - providing comfort in difficult times.



The cost of acquiring a dog or a cat soared following the onset of the pandemic, with newer owners reporting prices around double those of the pre-March 2020 world.

Indeed, 34% of dogs now cost more than \$2,000 vs 16% pre-pandemic, and 11% of cats now cost more than \$1,000 vs 8% pre-pandemic.



Housing constraints and costs are key barriers holding back would-be owners and current owners hoping to grow their 'pack'.

Current non-owners - particularly renters and apartment dwellers - are especially likely to point to unsuitable homes or issues with landlords, body corporates and strata laws.



The boom has resulted in a greater proportion of new owners who need tailored information, products and services.

Using advanced analytics, we identified four distinct segments through their demographic, attitudinal and behavioural traits - highlighting how some are driven by Affordability & Convenience, some by Simplicity & Reliability, others by Care & Quality, and yet others by Appeal & Reassurance.

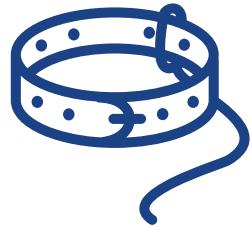
We are now estimated to be spending over \$33 billion annually to keep our pets fed, healthy and well-accessorised.

Food represents 51% of all expenditure - followed by vets at 14%, products and accessories at 9% and pet healthcare products at 9%. Around 89% of this total is on dogs and cats.

Vets remain the most trusted source of advice, and 84% of dog owners and 69% of cat owners taking their animals to the vet in the last 12 months

- mostly for general check-ups and vaccinations.

However, 68% say they had considered not going to the vet when they needed to, driven partly by cost considerations.



1.

Pet ownership in Australia



Australia's pet population is estimated to be 28.7 million, with 6.9 million households having a pet today.

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The boom has resulted in a greater proportion of new owners who need tailored information, products and services. Using advanced analytics, we identified four distinct segments through their demographic, attitudinal and behavioural traits - highlighting how some are driven by Affordability & Convenience, some by Simplicity & Reliability, others by Care & Quality, and yet others by Appeal & Reassurance.

This chapter explores the breadth and depth of pet ownership in Australia today.

Ownership rates and trends

Following a boom in pet ownership at the outset of the COVID-19 pandemic, Australia's pet ownership rate has stabilised.

Dogs and cats have led this sustained growth in pet ownership. Consistent with previous AMA surveys, dogs have remained the most popular pet, with almost half of Australian households having at least one dog (48%, up from 40% in 2019). Cats continued to be Australia's second most popular pet, with a third of all households housing at least one feline friend (33%, up from 27% in 2019).

They are followed in popularity by fish (12%), birds (11%), small mammals (4%), reptiles (3%) and other pets (1%) such as horses, farm animals and crustaceans. Fish ownership has remained steady over time, though there are indications that an initial pandemic uptick in keeping birds, small mammals and reptiles may have softened in the last 12 months.

As noted in our *Pets and the Pandemic* report, many new pet owners said they had long been thinking of adding a pet to their household - and the pandemic had simply given them the time and opportunity to be home to 'on-board' the pet they've wanted. Indeed, few participants in this year's survey chose specific pandemic-related reasons for why they have obtained their pet - though we note there has certainly been a surge in less experienced pet owners who require support - including 58% of those who have acquired a dog since the onset of the pandemic, and 54% of those who've acquired a cat during the same period.

While a consistent two in five pet-owning households have only one pet, a greater proportion of the rest are now more likely to have more than one type of pet - up from 22% in 2019 to 28% now.

Households that own a particular type of pet are most likely to have only one animal of that type - for example, dog-owning households are most likely to have only one dog. However, the average number of animals - shown in the table below - is driven up by the 25% of dog owners who have more than one dog, the 33% of cat owners with more than one cat, the 77% of fish owners with more than one fish, the 54% of bird owners with more than one bird, the 48% of small mammal owners with more than one mammal, and the 41% of reptile owners with more than one reptile.

All of this, when extrapolated against the number of households in Australia, suggests that we collectively have around 28.7 million pets as of July 2022 - outnumbering the 25.8 million people coast to coast.

Pet Ownership in Australia, 2022				
Household penetration (%)	Total owner households ('000s)	Animals per household (average)	Total pet animals ('000s)	
Dogs	47.8	4,831.1	1.3	6,375.6
Cats	33.3	3,365.0	1.6	5,333.2
Fish	12.1	1,223.8	9.2	11,278.2
Birds	10.5	1,064.7	3.7	3,926.8
Small mammals	3.7	376.7	2.4	901.0
Reptiles	3.1	315.7	1.7	538.3
Other pets	0.8	85.1	4.4	377.8
Pet owners	68.7	6,946.1		28,730.8
Non-owners	30.9	3,124.0		

QA7. Which of these pets, if any, do you have in your household?

QA8. How many pets do you own? Base: All participants (n=2,073). Extrapolations based on survey data and ABS population and household estimates. See technical notes for further information.

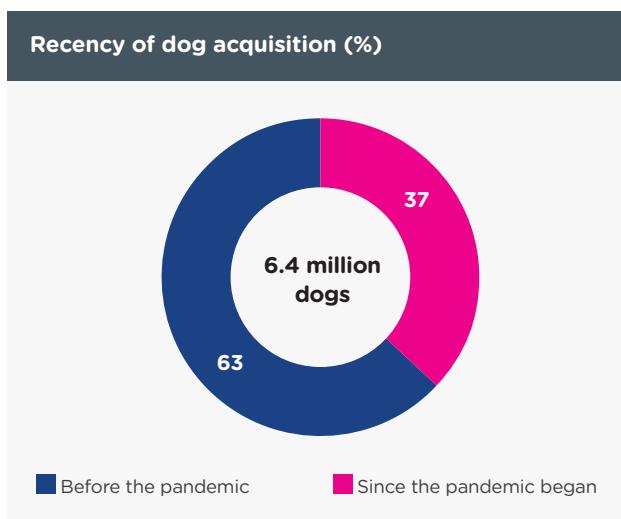
Considering the pandemic pet ownership boom, it is perhaps not surprising that 45% of current pet owners can be classified as less experienced - up significantly from even 12 months ago (39% in the 2021 survey). Specifically, 24% grew up with pets but did not have main caring responsibilities, 9% have lived only with a pet belonging to someone else, and 12% have never lived with a pet - with the latter cohort driving the uptick in new pet ownership.

In supplementary questions fielded as part of SEC Newgate's Mood of the Nation August 2022 (a nationally representative online survey of n=1,804 adults), we found that 93% of all Australians have had a pet at some point - including 79% with dogs, 60% with cats, 58% with fish, 49% with birds, 34% with small mammals, and 16% with reptiles. Our 2021 *Pets and the Pandemic* study also found that pet ownership begets pet ownership - with focus group discussion underscoring how previous experience with pets tends to inform the desire for a pet, the type of animal and the specific breed.



Dogs

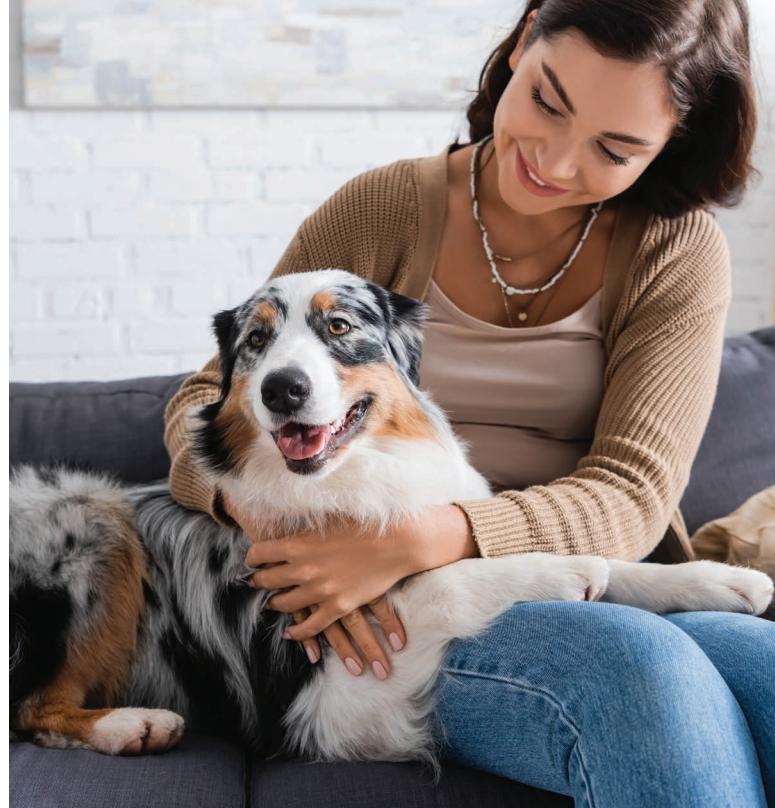
Dogs can be found in almost half of all households (48%) - equating to an estimated 6.4 million pet dogs nationwide. While dog-owning households each have 1.3 dogs on average, the vast majority (75%) have only one dog and most of the remainder (21%) have two dogs.



D21B. When did you get [name]? Base: Dogs, 2022 (n=1,214)

Nearly two in five dogs in Australia (37%) have been acquired since the onset of the pandemic. Of these, 42% were acquired by experienced pet owners, 20% by those who've grown up with family pets, 14% by those who've lived with other people's pets, and 24% by those who have no experience with any pets. A third of these (36%) were also dogs born before the pandemic, including 14% aged five years or older.

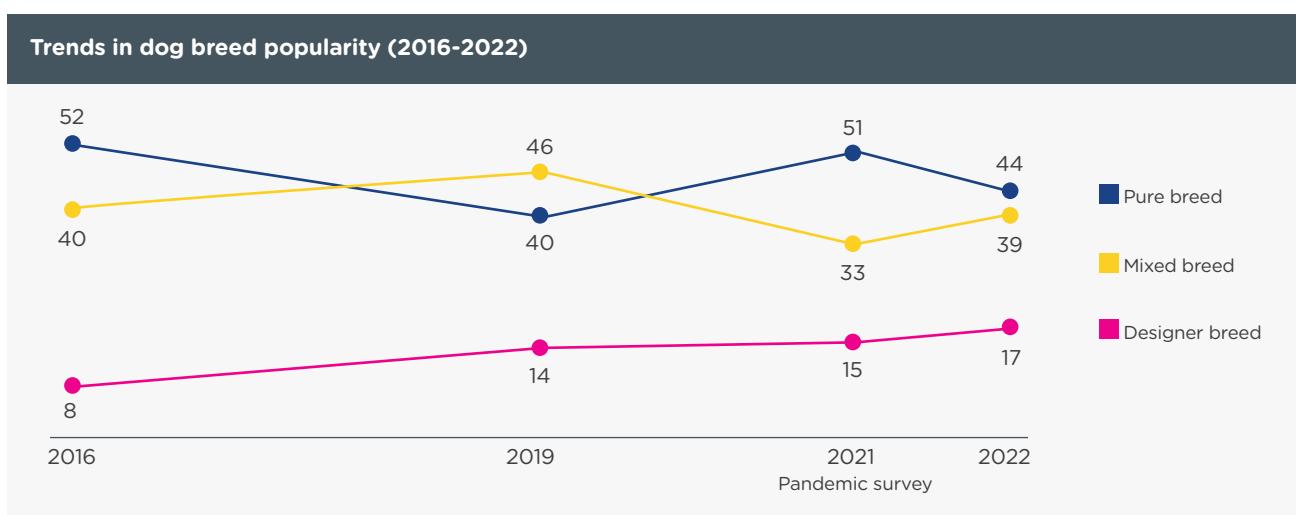
The remaining two-thirds (64%) were pandemic puppies - meaning that a quarter of all pet dogs today (26%) are aged two years or younger, up from 20% in 2019. Perhaps owing to this surge of first-time puppy parents, dogs are now more likely to be kept indoors only - from 13% in 2019 to 17% - though the majority (71%) continue to be kept both indoors and outdoors.



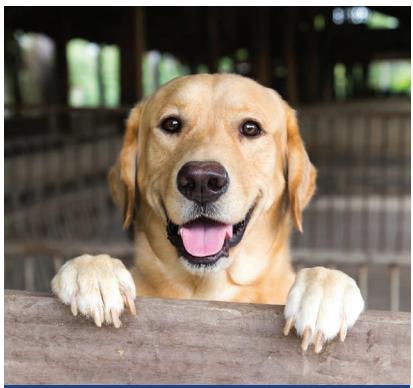
Just over two in five dogs (43%) are small dogs weighing up to 10kg, including 10% that weigh up to only 4kg (though some of these may still be puppies); over the longer term, this appears to have diminished somewhat from the 48% reported by dog owners in 2016. An additional 35% of dogs are in the medium-weight class of 10-25kg, while the remaining 22% are large dogs weighing more than 25kg.

Compared to 2019, dogs are now more likely to be taken out of the home (94% vs 89%) - most commonly on local walks (74%), to parks and beaches (57%), to visit friends or family (50%) and on holidays (25%). At lower levels, dogs are also increasingly more likely to be taken shopping (13% vs 9% in 2019), to work (8% vs 4%), on public transport (5% vs 3%), and on flights (4% vs 1%).

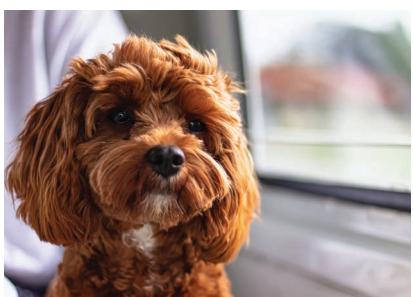
While purebred dogs with certificates have largely remained the most common in Australia (accounting for 44% of all dogs canvassed in this survey), they've tended to be followed closely by mixed-breed dogs (now 39% of all dogs). Meanwhile, designer breeds (crossed between two purebred parents) have increased in popularity - from only 8% in 2016 to 17% now, doubling in proportion in just six years.



D2. What type of dog is [name]? Base: Dog owners, 2016 (n=1,059), 2019 (n=1,013), 2021 (n=648), 2022 (n=1,218)



Pure breeds: Common breeds named by dog owners include Labrador Retrievers, German Shepherds, Border Collies, Jack Russells, Pomeranians, Staffordshire Bull Terriers, Cavalier King Charles Spaniels and Chihuahuas.



Designer breeds: Poodle crosses remain popular - including 'cavoodles', 'labradoodles' and 'cockapoos'.



Mixed breeds: Many mixed-breed dog owners are uncertain about the exact breeds that make up their dogs, though they can identify at least one or two 'source' breeds - often including some mix of Staffordshire Bull Terrier, Kelpie, Maltese, Jack Russell, Labrador or Poodle.

Breeders have remained the top channel for acquiring a pure-breed dog, particularly compared to other breeds (51% vs 29%). This was followed by family, friends or neighbours (14%), pet shops (13%) and animal shelters (11%) - with an uptick in purebred dogs acquired through pet shops since 2019 (8%).

Around 14% of all purebred dogs were obtained for free. Since the onset of the pandemic, purebred dogs have cost an average of \$1,731 for those who paid anything - compared to \$1,246 prior.

Companionship tends to be the number one reason for getting a dog (52%), regardless of its breed - followed by mental health benefits (23%), the specific breed being a suitable size (22%), relaxation (20%), the specific breed having a good temperament (20%) and physical health benefits (18%); for purebred dogs, relaxation and good temperament were even more commonly cited reasons (23% vs 18% and 25% vs 16%, respectively). At lower levels, dogs of all breeds tend to be obtained as rescues (15%), for security (14%), to provide companionship to other pets (14%), to serve specifically as a support animal (11%), and for the company during pandemic lockdowns or working from home (10%).

The lifestyle of a pure-breed dog remains relatively lavish and secure: they are more likely to live in households earning more than \$100,000 (49% vs 40% of households on lower incomes), be based in metropolitan areas (46% vs 37% regional areas), have seen a vet in the past year (87% vs 81%), and be taken to beaches, parks and other public spaces (61% vs 54%).

Breeders are still, by and large, the most common avenue for acquiring a designer dog (41%), followed by pet shops (15%). The data suggests a mid-pandemic surge in designer breeds being obtained through family, friends and neighbours (18% in 2019 to 25% in 2021 to 12% now) and a corresponding dip in acquisition through animal shelters (10% in 2019 to 5% in 2021 to 13% now).

Around 15% of all designer dogs were obtained for free. Since the onset of the pandemic, designer dogs have cost an average of \$1,534 for those who paid anything - compared to \$985 prior.

While the main reasons for acquiring a designer dog were consistent with other breeds, designer dogs were also much more likely to have been chosen for their low-shedding or hypoallergenic qualities (19% vs 7% non-designer breeds). They were also more likely to have been picked to teach responsibility to children (11% vs 7%) - and are more likely to be taken to work (13% vs 7%) and on flights (7% vs 3%).

These dogs were much more likely to have been acquired through personal connections (e.g. family, friends or neighbours - 26% vs 13% other breed types) or animal shelters (27% vs 12%) - and much less likely through breeders (23% vs 48%), pet shops (8% vs 14%) or vets (2% vs 5%).

Around 28% of all mixed-breed dogs were obtained for free. Since the onset of the pandemic, mixed-breed dogs have cost an average of \$1,257 for those who paid anything - compared to \$489 prior.

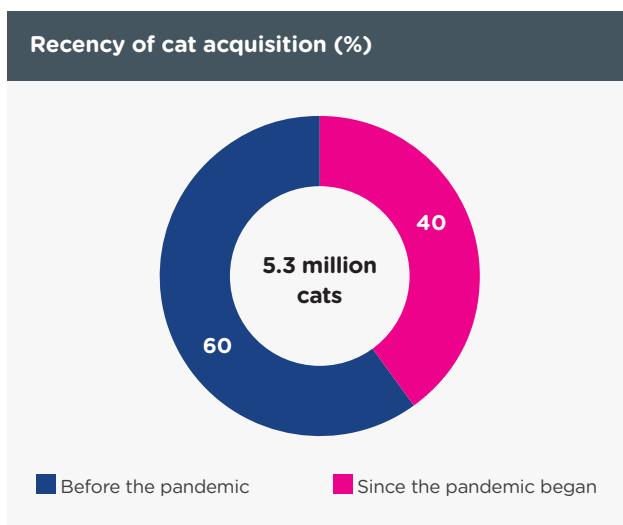
While the top reasons for acquisition were consistent with other dogs, mixed breeds were much more likely to have been rescued (23% vs 10% other breed types) or given to the owners (13% vs 8%) - and less likely to have been picked for their temperament (12% vs 25%) or low-shedding qualities (6% vs 11%).

Though mixed-breed dogs live in all types of households, they are more likely found in lower-income households earning less than \$100,000 per annum (43% vs 34% of households earning \$100,000+). Their owners are also more likely to be not employed (e.g. unemployed, home duties, studying or retired - 46% vs 35% of people in employment) or receiving social security benefits (e.g. pensions - 46% vs 35%).



Cats

A third of Australian households have a cat today (33%), with the estimated number of pet cats at 5.3 million. While cat-owning households each have 1.6 cats on average, the vast majority (67%) have only one cat and most of the remainder (23%) have two cats - meaning the final 10% have three or more cats.



C20B. When did you get [name]? Base: Cats, 2022 (n=838)

Around two in five cats in Australia (40%) have been acquired since the onset of the pandemic. Of these, 46% were acquired by experienced pet owners, 20% by those who've grown up with family pets, 13% by those who've lived with other people's pets, and 21% by those who have no experience with any pets. A third of these (33%) were also cats born before the pandemic, including 10% aged five years or older.

The remaining two-thirds (67%) were pandemic kittens - meaning 29% of cats today are two years or younger. This is on par with the result in 2019 (25%) but follows a significant spike in 2021 (34%), suggesting a surge of pandemic kittens being acquired last year. And, also like dogs, cats are being increasingly kept indoors only - from 36% in 2019 to 42% now, with a corresponding decrease in those who allow their cats both indoors and outdoors (from 58% to 51%).

Cats were most likely acquired through animal shelters (28%) and friends, neighbours or family (25%). At lower levels, people also turned to breeders (14%), pet shops (11%, up significantly from 8% in 2019), and vets (5%). Additionally, one in ten pet cats (10%) tended to be adopted strays, while 3% were inherited.

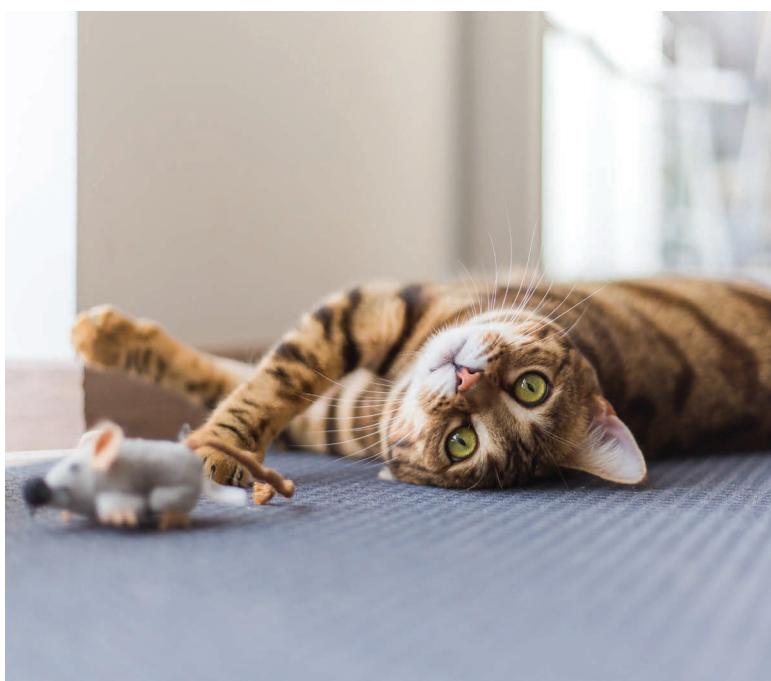
The 2019 Pets in Australia report featured a module on cat breeds - finding that 71% of cats at the time were mixed breeds, 24% were pure breeds with certificates, and 5% were designer breeds (though cat owners appeared to use the latter two categories interchangeably). We found that many owners struggled to name specific breeds, using colloquialisms such as 'domestic short-hair', 'moggy', 'tabby', or simply naming the cat's colours.



The most commonly cited pure or designer cat breeds at the time included Ragdoll, Burmese, Siamese, British Shorthair, Persian, Bengal, Russian Blue and Maine Coon.

The top reasons for getting a cat included companionship (44%), rescue (32%), mental health benefits (21%) and relaxation (20%) - followed by having the cat specifically serve as a support animal (15%), having been gifted or bequeathed the cat (14%) and providing companionship to other pets (14%).

Though pet cats tend to live in higher-income households earning over \$100,000 per annum (42% vs 30% of households making less than \$100,000 a year), this income skew is true of pet ownership in general. Cat owners, however, are more likely to exhibit higher financial vulnerability indicators (37% vs 32% with lower vulnerability) and to have a household member who requires regular care (44% vs 32% who do not).





Fish

Around one in ten Australian households have pet fish today (12%), with the estimated number of pet fish at 11.2 million. Fish-owning households each have 9.2 fish on average - with 23% having only one fish and 24% having more than ten (and a median of four fish per household).

The top reasons for keeping pet fish are relaxation (42% - particularly tropical freshwater fish, at 54%), their relatively low-maintenance nature (31%), treating them as a hobby (26%), mental health benefits and companionship (14% each). Pond fish are also more likely to have been obtained as gifts or bequeathments (22% vs. 8% of other fish), to specifically serve as support animals (11% vs 4%), and because the owner had more time due to lockdowns and working from home (9% vs 2%).

Pet fish continue to be kept mostly indoors (74%), with fishbowl / cold water tank species the most popular (51%) - followed by tropical freshwater species (35%) and pond species (24%). Though they are still the least common, marine species have jumped in popularity - from 6% in 2019 to 12% today.

Birds

Around 11% of Australian households keep birds today, representing an estimated 3.9 million pet birds. The average number of birds per bird-owning household is 3.7 - though 46% of bird owners have only one bird, a further 24% have a pair of birds, and the remaining 30% have three or more birds (with a median of two birds).

The most common reasons for keeping birds are for their company (29% - particularly indoor birds, at 36%), using them as a hobby (25%), relaxation (22%) and their eggs (18% - particularly chickens, at 53%).

Caged indoor birds are the most popular (kept by 65% of all bird-owning households), followed by chickens (34%); both of these categories have increased since 2019 (56% and 25%, respectively). Meanwhile, there are indications that outdoor aviary birds may have become slightly less popular over time - from 37% in 2019 to 31% now.



Small mammals

Around 4% of Australian households keep small mammals - resulting in an estimated 901,000 nationally. Mammal-owning households each have 2.4 on average, though 52% have only one animal, 29% have two animals, and the remaining 19% have three or more animals (with a median of one).

Relaxation (27%) and companionship (25%) are the most common reasons for keeping small mammals, followed by using them as a hobby, rescuing them and these pets being lower maintenance (18% each).

The most popular small mammals to keep as pets are rabbits (54% of small mammal-owning households) and guinea pigs (43%), followed by mice or rats (13%) and ferrets (8%). There are some indications that rabbit ownership may have dipped slightly in 2019 (27%, from 55% in 2016), though the sample sizes for this cohort of pet owners are relatively small - meaning results should be interpreted with caution.



Reptiles

Around 3% of Australian households keep pet reptiles today, with an estimated 538,000 pet reptiles nationally. On average, 1.7 reptiles can be found in each reptile-owning household - though 59% own only one reptile, 29% own two reptiles, and the remaining 12% own three or more (with a median of one).

The most common reasons for keeping reptiles are their relatively low-maintenance nature (24%), being gifted or bequeathed them (24%), companionship (22%) and using them as a hobby (19%).

The most popular pet reptiles are snakes (owned by 36% of reptile owners), turtles and tortoises (33%) and lizards (31%) - followed by frogs and salamanders (14%). There are indications that pet turtles and tortoises have become more popular over the longer term, compared to only 15% in 2016.

Pet ownership during the COVID-19 pandemic

The onset of the COVID-19 pandemic was an extremely difficult time for many people across the world – and Australia was no exception. Caught between stay-at-home orders, border closures, social isolation and financial stress, many turned to pets – whether old or new.

As detailed in our *Pets and the Pandemic* report (available from the Animal Medicines Australia website), the protracted periods at home gave pet owners the time to strengthen the bond with their pets - and the opportunity for anyone considering adding a new pet to their household to do so.

When asked to describe how they have felt about being a pet owner during the pandemic, it's clear that Aussie pet owners feel pets brought a light of happiness and love during a challenging time - underlying the importance of pets in people's lives.



Z1. In a single word, how would you describe the way you've felt about being a pet owner over the course of the pandemic?
Base: Pet owners, 2022 (n=1,723)



Who are Australia's pet owners?

The portrait of Australia's pet owners has remained largely unchanged. However, new profiling questions asked for the first time this year have highlighted additional nuances in who is more likely to own pets.

Pet owners		Non-owners
69% nationally - are more likely to be... (n= 1,723)		31% nationally - are more likely to be... (n=730)
87%	Those who identify as Aboriginal and/or Torres Strait Islander*	32% Those who do not identify as Aboriginal or Torres Strait Islander
86%	Households with children aged under 18 years	47% Solo-person households 36% Couple-only households
85%	Those who identify as part of the LGBTQI+ community*	32% Those who do not identify as part of the LGBTQI+ community
82%	Households with incomes of \$100,000 or more per annum	36% Households with incomes of less than \$100,000 per annum
79%	Gen Z (18-24 years)	48% Boomers+ (60 years or older)
80%	Millennials (25-39 years)	
77%	Those who have experienced a recent natural disaster	32% Those who have not experienced a recent natural disaster
77%	Those who are employed by others	52% Retirees
76%	Those with home duties	
75%	Multi-person households	49% Single-person households
74%	Regional or rural households	33% Urban or inner-city households
74%	Those with tertiary-level or higher education	34% Those without tertiary-level or higher education
73%	Those not from culturally and/or linguistically diverse backgrounds	39% Those from culturally and/or linguistically diverse backgrounds
73%	Those living in houses	50% Those living in apartments or units
72%	Homeowners	36% Renters
72%	Those who do not receive any social security benefits	36% Those who do receive social security benefits

*Vulnerable cohorts within the general community tend to be under-represented in professional online research panels. Indeed, the participants in this survey who identified as First Nations and/or queer skewed towards less vulnerable members of those cohorts - e.g. with higher-than-average educational attainment and household income. As a result, findings relating to these cohorts should be interpreted with caution.

As seen in previous reports, many of these traits of pet owners and non-owners tend to 'cluster'. For example, older Australians are more likely to live alone, be empty-nesters, be retired and have lower household incomes. As in the past, a notable exception is a higher propensity for regional and rural households to have pets despite being more likely to have lower incomes - bucking an overall correlation between income and pet ownership.

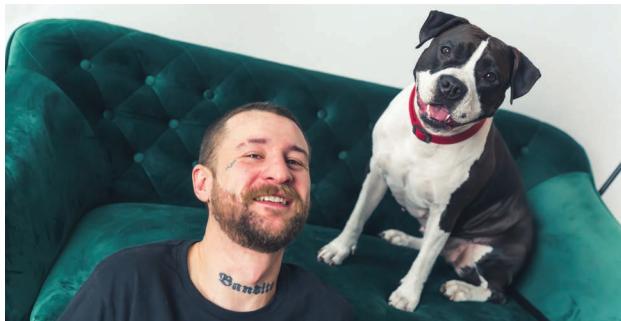




Australia's pet owner personas - a formal market segmentation

To delve deeper into who Australia's pet owners are - and how their needs could be better met - we undertook a formal segmentation analysis. We have identified four distinct pet ownership segments through iterative exploration of demographics, personal circumstances, attitudes, and behaviours - using this data-driven approach to check for archetypal pet-owner personas that may otherwise go unnoticed.

These segments have been named for their key values as pet owners - highlighting the most optimal approach to providing them with targeted pet-parenting information, products and services.



Affordability & Convenience (30%, n=527)

Stressed out and less likely to recommend pet ownership to others, higher financial and social vulnerability indicators characterise this segment. While dogs and cats are still the most common types of pets this cohort keeps, they are more likely than the other segments to keep pet fish.

This cohort skews towards middle-aged Millennials and Gen X pet owners renting in suburban areas - with a higher prevalence of solo households, young families and those living in share houses. They are the least culturally or linguistically diverse (CALD) group of pet owners - and there are far more men in this segment than women. While a majority are employed, they are also more likely than others to be not employed (unemployed, home-making, studying, retired), have lower income levels, have lower educational attainment, and feel more financially vulnerable.

Likely due to these characteristics, they demonstrate a stronger focus on affordability and convenience in their approach to pet ownership. They are the most likely of all the segments to express cost concerns and perceive difficulties with looking after their pets. Perhaps, as a result, they are less likely overall to have spent money across various pet expenditure categories or to undertake fun, social activities with their pets.

Consequently, empowering these pet owners should focus on providing affordable and convenient options that minimise cost and stress.



Simplicity & Reliability (25%, n=398)

This pet-loving segment comprises mostly Boomers+ aged 60 years or older, with a slight skew towards women. As a result, they are more likely to be retirees and empty-nesters, to have someone in their household who requires regular care, and to own their own (often larger) homes. They are more likely than the other segments to live in regional centres or rural areas, especially in NSW and Queensland.

This segment is more likely than others to have a single dog at home who provides them with a great sense of happiness and contentment. They are the most likely to say 'whether my pet likes it' is the top deciding factor in what they feed their pet - and more likely than most others to prioritise value for money, quality, variety, natural ingredients, nutritional completeness, and a familiar brand. Of all four segments, they have the least interest in getting another pet.

Perhaps due to their age and experience, they show greater confidence as pet owners. They are more likely than many other segments to spend quality social time with their pets, including taking them on neighbourhood walks and to parks and beaches. They are most interested in ensuring the needs of their pets are met to a reliable standard - and less interested in any elaborate activities or offerings for their pets.

This segment's characteristics indicate that they would appreciate simple, reliable products and services to help them maintain a happy, well-cared-for pet.



Care & Quality (27%, n=466)

This segment is the most positive and enthusiastic of all four segments, showcasing a strong emotional connection with their pets and a willingness to invest in their pets' quality of life. They adore their pets, whose needs are capably catered for - though they are not as overtly enthused about their pet parenting as the Appeal & Reassurance segment.

Skewing middle-to higher-income families, this segment is more likely to be middle-aged Millennial and Gen X women living in larger homes in suburban areas. They are likely employed and appear to be the least financially vulnerable segment, underscoring their ability and willingness to pay whatever it takes - so long as the proposal isn't too 'over-the-top'.

This segment tends to be more experienced and self-assured pet owners - partly because they seem to read all the fine print on their pet food labels! They are the most likely to partake in a range of fun, pet-related activities and to take their pets out to social places such as cafés and restaurants. Consequently, they are the most willing to spend money across all pet product and service categories - including paying vets for preventative advice as much as treatment for illness.

Given their focus on the happiness of their pets, these owners would appreciate high-quality products, services and information that demonstrate a sense of genuine care for their pets.



Appeal & Reassurance (19%, n=330)

This segment skews towards urban, wealthier, highly educated and younger men - particularly high-flying professionals and well-to-do families with young children. They are the most likely to identify as First Nations, CALD and/or queer - though we note our participants from these community cohorts skew wealthier and highly educated. They are also most likely to be paying a mortgage on an apartment or townhouse, particularly in Sydney.

They are the least experienced pet owners but paradoxically more likely to have more pets and more types of pets. Dog owners in this segment are more likely to take their dogs everywhere (including work and holidays) - and these pet owners are more likely to engage in social-media-friendly activities such as wearing matching outfits and arranging pet parties.

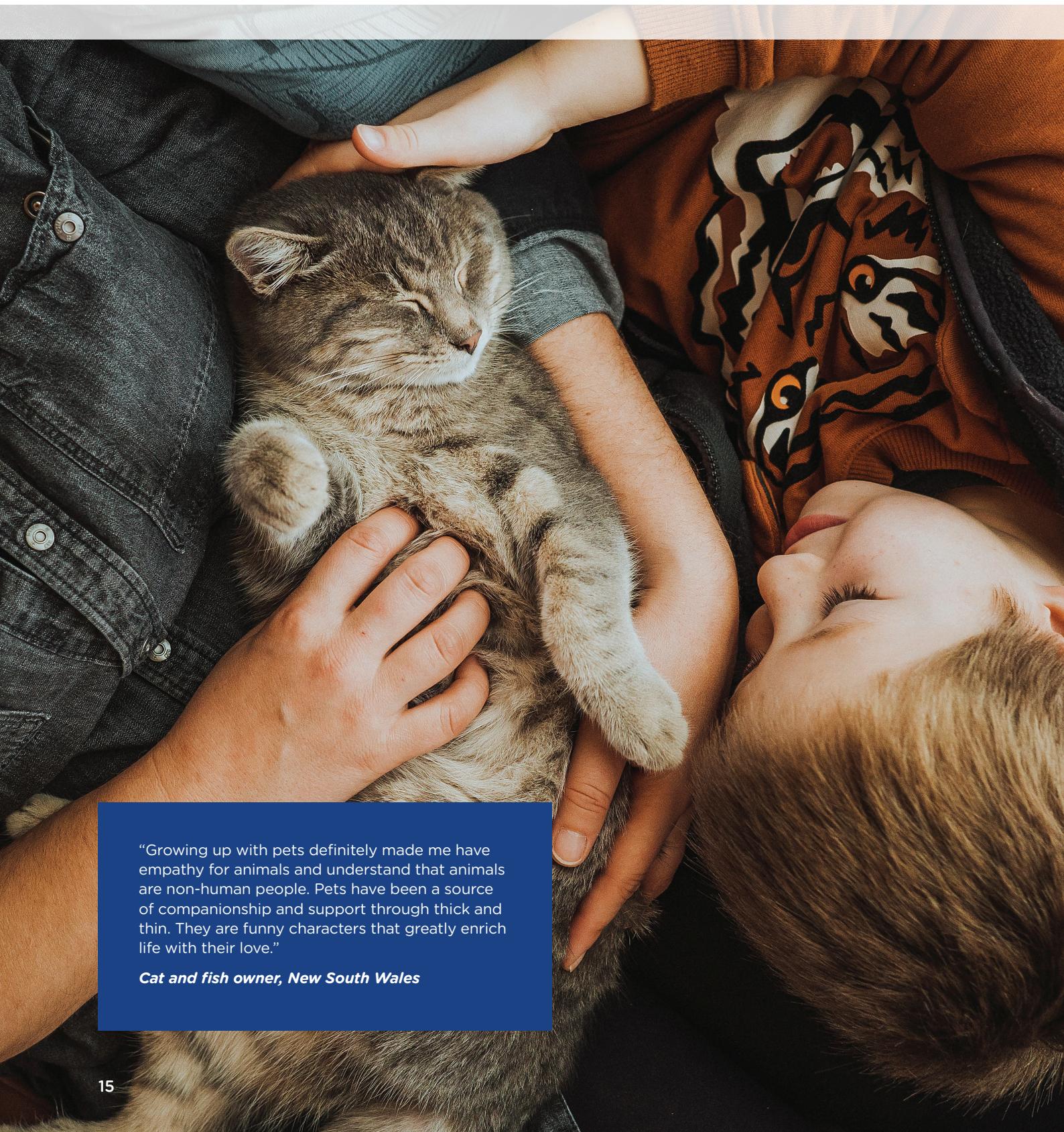
They are willing to go beyond 'the basics' and invest in more discretionary pet expenditure categories such as boarding, minding, and pet competitions and clubs. When making purchases, they rely on a combination of visual appeal and reassurance - for example, choosing pet food based on breed-specific recommendations, quality certifications and visually-engaging packaging.

This segment is likely searching for fun and shareable solutions - underpinned by a sense of comfort that they are getting their pets the best, even if it's stretching the budget. This segment has the greatest opportunity for further education on keeping a happy and healthy pet.



2.

Pets and people



The love Australians feel for their pets has remained strong despite a global pandemic and economic uncertainty, with 85% of owners saying their pets have positively impacted their lives.

Many continue to point to pet ownership's emotional, social and health benefits - providing comfort in difficult times.

Indeed, companionship remains a key reason for acquiring a pet - regardless of whether they are big and furry or small and scaly. Previous surveys found that most dogs and cats, in particular, were seen as family members - and this has continued to manifest in how we talk to and engage with our pets.

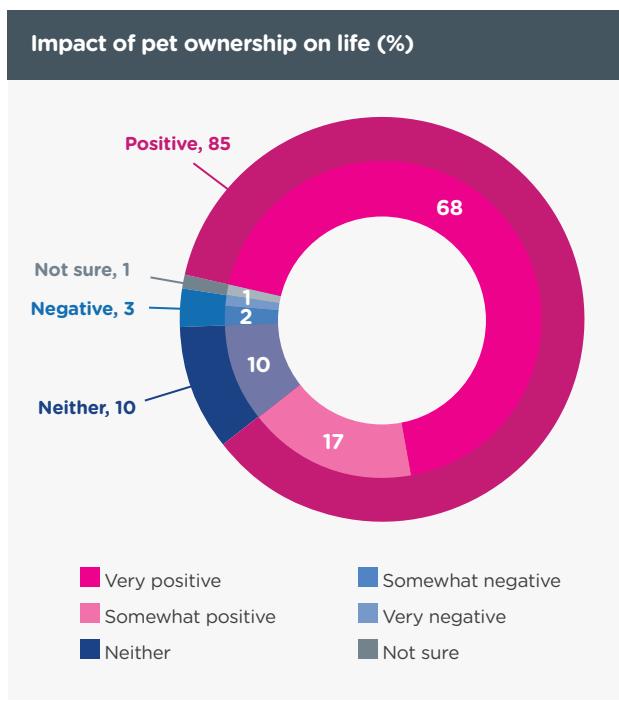
When we are away from home, we turn to trusted family members and friends to look after our pets - and, increasingly, pet sitting and minding services. Meanwhile, new questions on surrendering explore what happens when we can no longer look after our pets - a solution of last resort affecting the more vulnerable.

Benefits of pet ownership

Pets are seen as sources of unconditional love and joy, with many treated as life companions, best friends and family members. Indeed, many pet owners enthusiastically extolled the benefits of ownership, with some saying they cannot imagine life without their pets.

Beyond love and companionship, owners are also quick to mention pets' positive impacts on their physical and mental health. They say their pets get them out of bed, keep them moving, and boost their moods - particularly during the early days of the pandemic, where their routines provided a sense of calm and 'sanity' amidst heightened distress and anxiety.

Pets also brighten the social lives of their human families - teaching children responsibility and compassion, providing a connection to the community, and offering opportunities for human interaction that would otherwise be missing (whether in dog parks or online forums for tropical fish owners).



F18. On balance, what kind of impact - positive or negative - has being a pet owner had on your life? Base: Pet owners (n=1,724).

"They fill a socialisation and happiness gap that humans don't provide, and provide a lot of companionship of high value."

**Dog and small mammal owner,
New South Wales**



"I think I would be much worse off without my pets. They bring me laughter and joy. They need me and love me. I think I would be depressed and unhappy and less capable of looking after myself if it weren't for my pets."

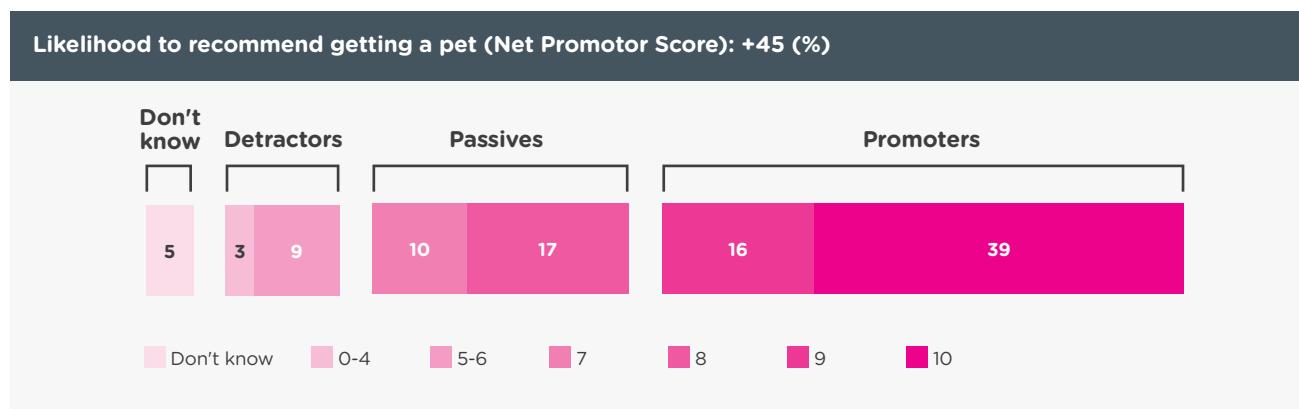
Cat and dog owner, New South Wales

"Over the years, I have had many dogs and have enjoyed many a long walk. Current birds make me smile when they whistle the 1812 overture or Jingle Bells."

Bird owner, Western Australia

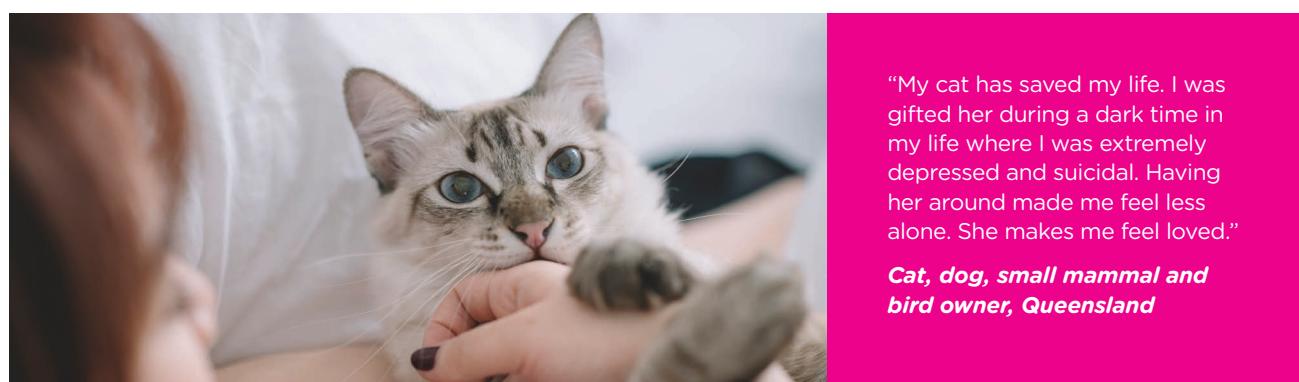


As a result, it is perhaps unsurprising that 85% of pet owners feel having pets has impacted their lives positively - regardless of the type of pet, and on par with the 88% who felt the same in the 2019 study. The 3% who feel that pet ownership has impacted them negatively (higher amongst the 'Appeal & Reassurance' segment, at 8%) tended to cite the costs of caring for pets, the level of cleaning required, the time and responsibility demands, and limits on their ability to travel and be spontaneous.



F20. 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 ($n=1,724$).

Overall, the people who own pets remain staunch advocates for the benefits of pet ownership. Around 59% 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. As a result, the 'brand image' of pets remains strong, with a 'Net Promoter Score' (NPS) of +45%¹, on par with the +42% result in 2019 and continuing to outshine many charities and big-name brands.



"My cat has saved my life. I was gifted her during a dark time in my life where I was extremely depressed and suicidal. Having her around made me feel less alone. She makes me feel loved."

Cat, dog, small mammal and bird owner, Queensland



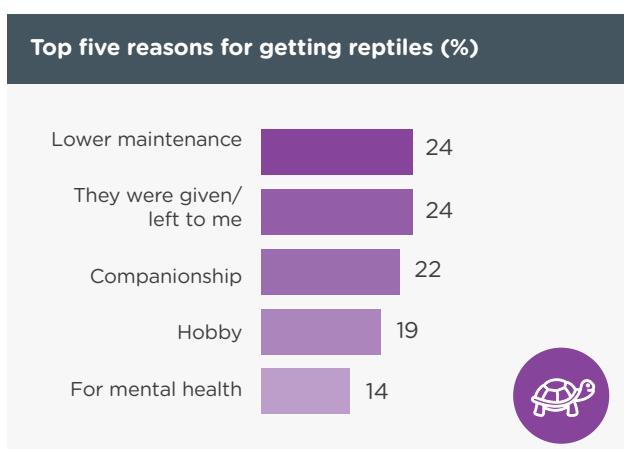
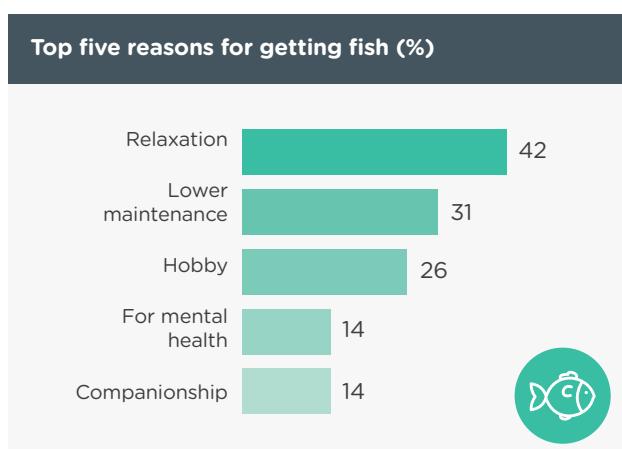
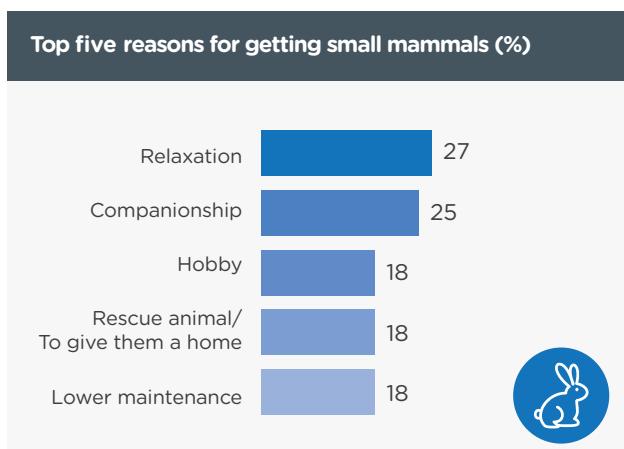
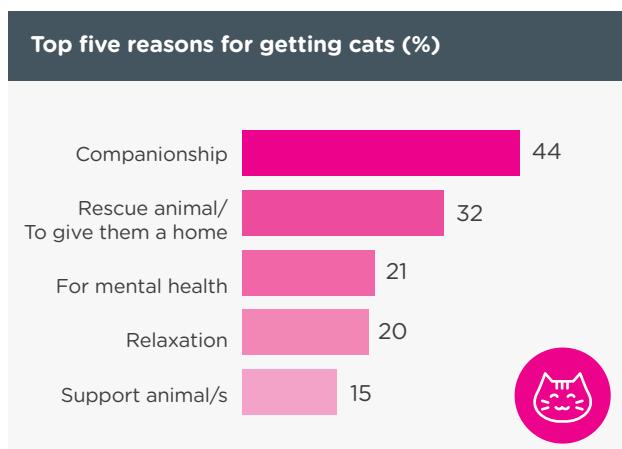
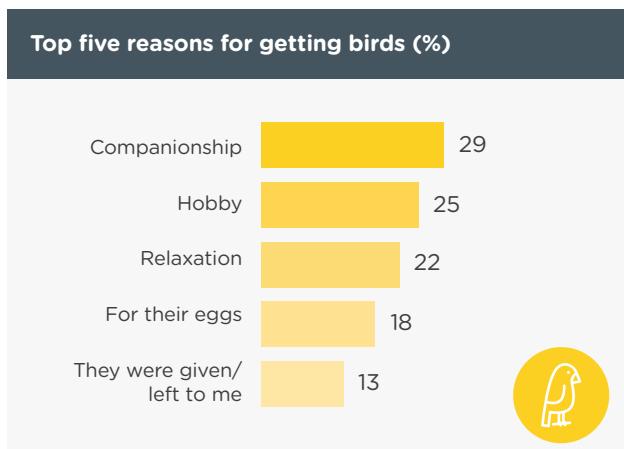
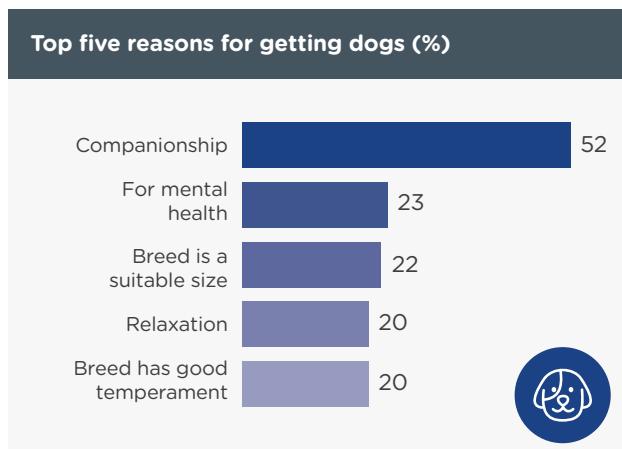
"The love from an animal is the best feeling in the world. Without them, my life would be over. They are my only source of companionship, and I love them."

Cat, dog, and bird owner, Queensland

¹The '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 +45%, on a scale of -100 to +100 - with 59% promoters, 13% 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.

Reasons for getting a pet

Typical reasons for getting a pet include companionship, rescuing animals, relaxation and mental health - plus breed-specific reasons such as certain animals being lower-maintenance or a more suitable size.



D9B, C8B, E5B, B3B, I3B, H2B. What were the reasons that made you decide to get your [pet]? Base: Dogs (n=1,215), Cats (n=838), Fish owners (n=309), Bird owners (n=265), Small mammal owners (n=93), Reptile owners (n=86)

In line with 2019, companionship is by far the most common reason for getting a dog (52%), cat (44%), or bird (29%). The top reason for getting a fish (42%) or small mammal (27%) tends to be relaxation. Meanwhile, the top reason for getting a reptile is that they are considered lower-maintenance (24%).



Confessions of pet parents

Given the humanisation of pets, it's unsurprising that popular baby names continue to appear amongst the most popular pet names. The top dog names submitted by our survey participants this year included Lucy, Coco, Max, Bella and Charlie - while popular cat names included Luna, Kitty and Maggie.



However, while many have continued to adopt pet parenting behaviours, this year's survey found a significant decrease in the popularity of some pet-parenting activities compared to before the pandemic. For example, while 50% talk to their pets regularly, this is down from 64% in 2019. Other downward shifts - at least in self-reported pet owner behaviour - included allowing pets to sleep in the same bed, calling themselves a 'mum' or 'dad' to the pet, giving gifts on special occasions, leaving on the heating / cooling / lights / TV / radio, rearranging personal commitments, and organising sitters or drop-offs/pick-ups.

The diminished prevalence of these activities may be due to the impacts of the pandemic. Perhaps the novelty of spending more time with pets at home has worn off following protracted stay-at-home lockdowns across much of Australia. Or, with the return to a post-pandemic 'new normal' and increasing cost-of-living pressures, perhaps pet owners are finding themselves with less time to spare. Further investigation may be required to unpack the reasons driving these behavioural shifts.

Nevertheless, there are some activities that pet owners are more likely to do compared to three years ago.

These include buying or making outfits and costumes for their pets (17% vs 13% in 2019), installing home monitoring cameras (8% vs 5%), opening up social media accounts for their pets (8% vs 5%), and wearing matching outfits and accessories with their pets (6% vs 3%).

Younger pet owners continue to be more likely to undertake a number of these activities - particularly 'fun' and social things like dressing up with their pets, throwing their pets birthday parties, and opening dedicated social media accounts. However, older pet owners such as those found in the 'Simplicity & Reliability' segment (as well as those living in smaller households) are more likely to talk to their pets.

Perhaps unsurprisingly, the 'Care & Quality' segment is more likely than other pet owners to do virtually all of these things, while the 'Affordability & Convenience' segment is the least likely to do any of these things. Meanwhile, members of the 'Appeal & Reassurance' segment are more likely to focus their energy on less conventional, more 'high-effort' things such as arranging pet parties and play dates, checking in remotely via security cameras or video calls, wearing matching outfits, and taking pets on flights.

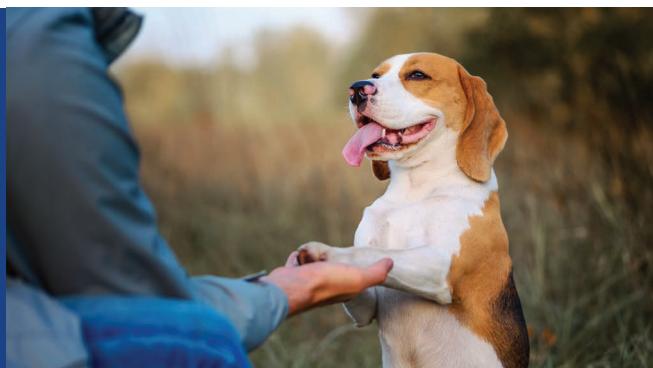
"I have struggled with mental health my whole life. When I got my dogs, I felt less alone, and they made me have to get up every day because they were my responsibility. They pushed me to get up and keep going. I'm so grateful for them and the joy they continue to bring."

**Dog, small mammal and reptile owner,
South Australia**



"My dog needs walking, and it motivates me every day to walk in the morning and afternoon. Healthy for him and myself. He makes me laugh and is a great companion."

Dog owner, South Australia



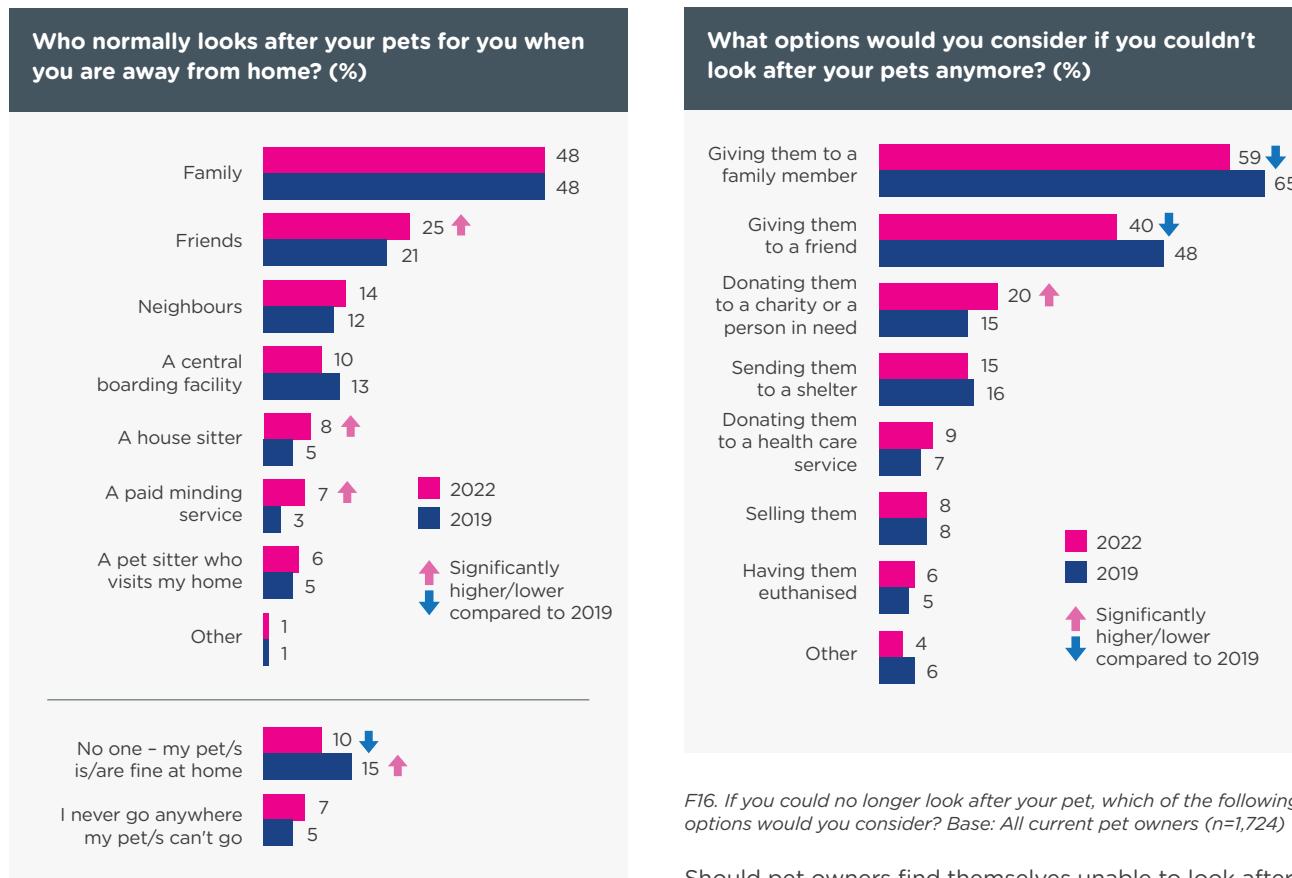
"They are always there for you and love you no matter what. The only downside is you virtually cannot take them with you on holidays, hotels, resorts, planes, etc. - especially if one of them is not well-behaved."

Cat and dog owner, Victoria





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



F15. When you are unable to have your pets with you, who normally looks after them for you? Base: All current pet owners (n=1,724)

Pet owners continue to turn to family (48%) and friends (25%) to care for their pets when they cannot look after them in the short term, with reliance on friends increasing from 21% in 2019. Notably, more owners are also turning to house sitters (8%, up from 5%) and minding services (7%, up from 3%) – perhaps because these services have become more accessible through apps such as Madpaws and Pawshake. Indeed, less experienced pet owners are more likely than others to call on sitters or minding services.

Interestingly, fewer owners today appear to be comfortable leaving their pets home alone - down from 15% in 2019 to 10% now. Boomers+ aged 60 years or older are significantly more likely to feel this way, as well as single-person households; both are traits associated with the 'Simplicity & Reliability' segment, who are indeed the segment more likely to feel their pets are fine at home alone. By contrast, the 'Appeal & Reassurance' segment is more likely to turn to most of the possible caring options - perhaps partly due to the relative ease of accessing commercial minding options in urban areas.

F16. If you could no longer look after your pet, which of the following options would you consider? Base: All current pet owners (n=1,724)

Should pet owners find themselves unable to look after their pets in the longer term, most would give them to a family member (59%) or friend (40%). While these options remain the most popular possible paths overall, pet owners are less likely to consider them today than in 2019. Instead, more people now would take their pet to a shelter (20%, up from 15%) – perhaps due to greater public awareness of the role that pet shelters and adoption centres have played in rehoming pets during the pandemic.

Some segments strongly prefer a trusted family member or friend to inherit their pet - particularly the owners in the 'Care & Quality' and 'Simplicity & Reliability' cohorts. Meanwhile, the 'Appeal & Reassurance' cohort is more likely to consider shelters, health care services, charities or people in need - as well as selling or euthanising their pets.

Notably, men are more likely than women to consider all options except giving pets to a family member or friend. Those who indicate some form of social or financial vulnerability - such as struggling to make ends meet, having a member of the household who requires regular care, receiving social security benefits, or recently experiencing a natural disaster - tend to prefer to donate or sell their pets. Indeed, this dovetails with findings regarding surrendering, detailed in the break-out box.

Pet surrendering

To explore the issue of pet surrendering, supplementary questions were fielded as part of SEC Newgate's *Mood of the Nation* August 2022, a nationally representative online survey of n=1,804 adults. The results indicate that, just as Australia had a pandemic-driven pet acquisition boom, there was also a surge in pet surrendering occurring in parallel - driven by difficult circumstances and amongst vulnerable pet owners.

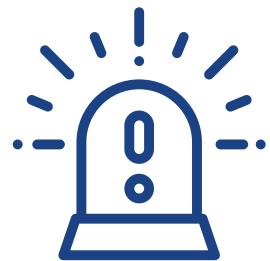
Around 13% of Australians have surrendered a pet because they could no longer look after them - with a skew towards reptiles and less common pets such as horses, cows, sheep and llamas. While most of this surrendering occurred before the pandemic, a disproportionately high proportion has been since March 2020 - 4% of the total 13% in just over two years.

Of those who surrendered a pet after the pandemic began, two in five (42%) had also acquired that pet after the pandemic began - people who perhaps quickly realised that they could not take on the required caring responsibilities. However, this means the other three in five pandemic-era 'surrenderers' were giving up pets they've had since before the pandemic.

The relatively low proportion of owners who have ever surrendered a pet - much less during the pandemic - means we cannot make confident extrapolations about their circumstances or reasoning. However, there does appear to be a skew towards those with greater financial and social vulnerabilities - including renters, younger people, queer people, First Nations people, those from a CALD background, single parents, households with lower incomes, those who care for someone with a disability, and those who've experienced a natural disaster in recent times.

These data points paint a portrait of people stretched thin and stressed out, having to give up their pets. It suggests a need for supporting services to help keep pet owners with their animals through difficult times, particularly given the earlier findings regarding the mental health benefits of companion animals.





3.

Barriers and challenges



While 69% of Australian households now have a pet, many more would like a pet (or an additional pet).

When extrapolated across the population, an estimated 3.5 million households are actively considering new pets in the next 12 months, and a further 4.4 million are broadly interested.

However, housing constraints and costs are key barriers holding back would-be owners and current owners hoping to grow their 'pack'. Current non-owners - particularly renters and apartment dwellers - are especially likely to point to unsuitable homes or issues with landlords, body corporates and strata laws.

And, despite extolling the benefits of pet ownership, 79% of current owners acknowledge experiencing at least some difficulty - higher than 66% in 2019 - perhaps spurred by some combination of pandemic challenges, cost-of-living pressures and an evolving public understanding of responsible ownership.

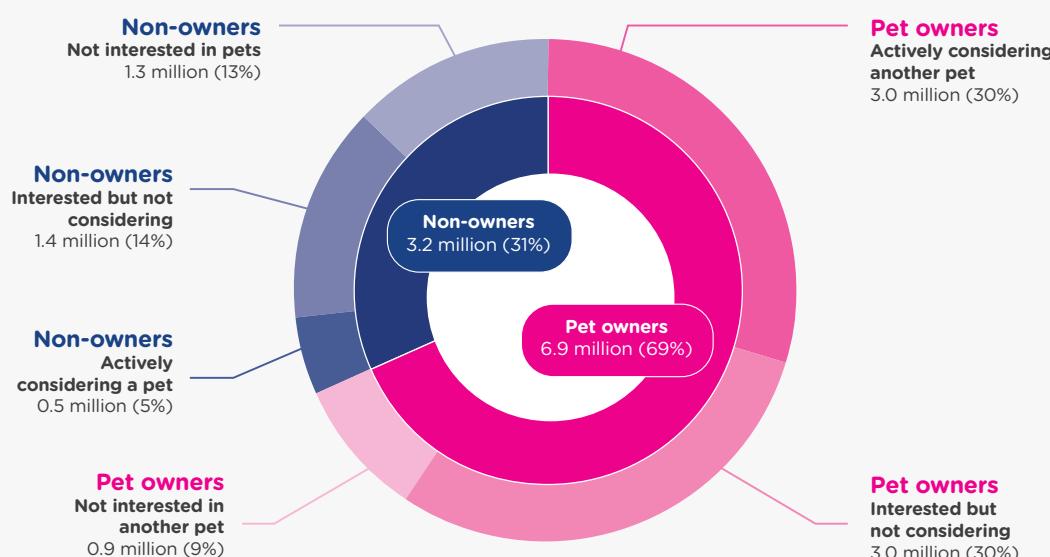
Prospective pet owners

Of the 31% of Australian households currently without a pet, 60% are interested in getting a pet - on par with 2019 findings. Pet preferences from non-owners are largely in line with current ownership proportions - with dogs (45%) and cats (20%) the most desired pets, followed by birds (10%), fish (9%), small mammals (5%), and reptiles (3%).

However, pet-less households with certain characteristics show a propensity towards different pet types: those based in regional areas are particularly interested in dogs (60% vs 53% of those in metro areas), while metro-based households are more likely to be open to cats (36% vs 29% of those in regional areas) or fish (16% vs 12%). Cats are also the preference for households exhibiting higher financial vulnerability indicators (38% vs 33% of those less vulnerable), along with small mammals (11% vs 9%).

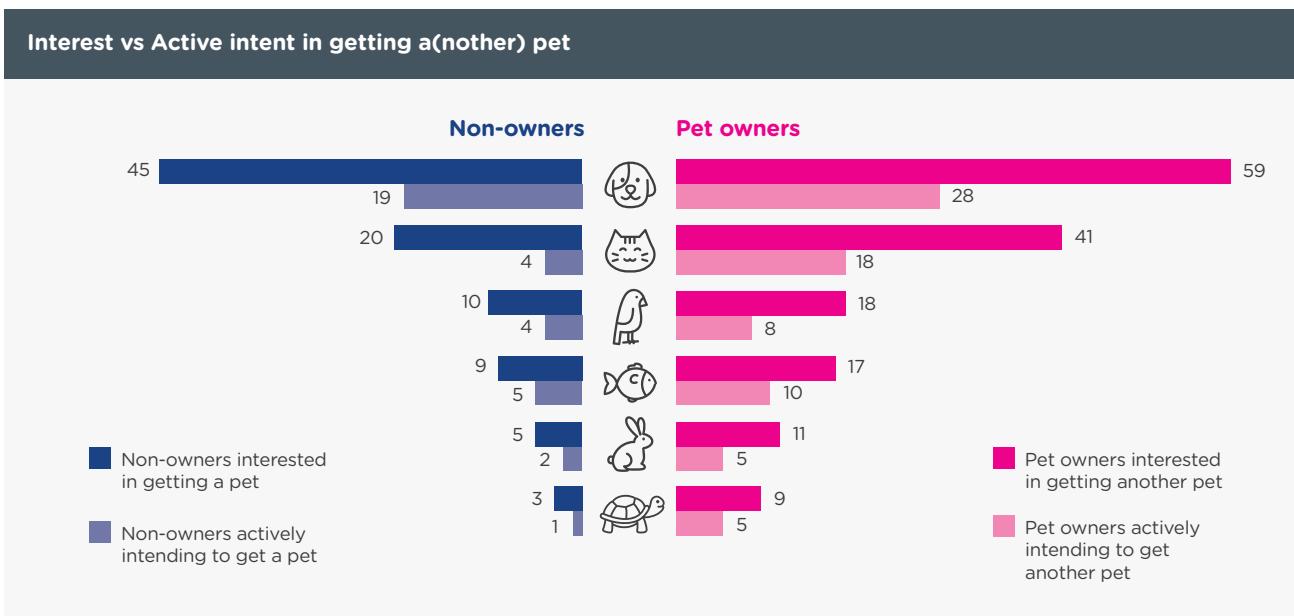
In general, younger people are very interested in all types of pets, with 93% of Gen Z adults (18-24 years old) interested in getting a new pet or another pet (vs 77% of older generations). Larger households with more than three members are also more likely to be drawn to the idea of having a pet (85% vs 74% solo or couple-only households) - ditto wealthier households earning more than \$100,000 annually (85% vs 76% earning less than \$100,000 per year).

Australian households by current and prospective pet ownership, 2022



QA9. Which of these pets, if any, would you like to own?

QA13B. Are you actively planning on getting a new pet in the next 12 months? Base: All participants (n=2,453). Extrapolations based on survey data and ABS population and household estimates. See technical notes for further information.



A9. Which of these pets, if any, would you like to own? A13B. Are you actively planning on getting a new pet in the next 12 months?
Base: All participants (n=2,453).

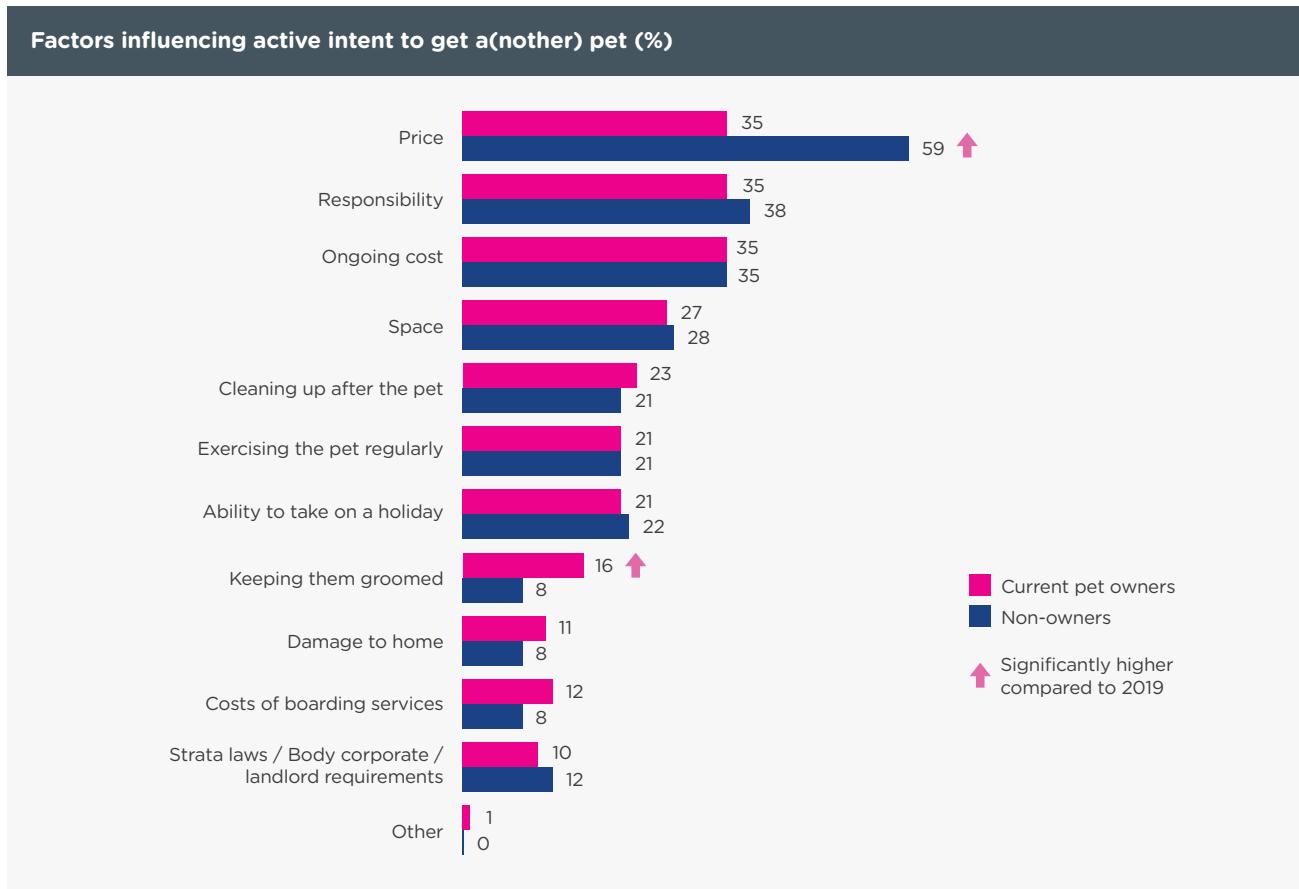
Interest in getting a new pet is stronger amongst current pet owners than non-owners - likely due to owners already having overcome common barriers and concerns. Notably, the proportion of current pet owners who say they are considering another pet has increased substantially since 2019 - from around one in ten to nine in ten - and half of these say they are actively considering a new pet within the next 12 months. This may have been partly triggered by the pandemic opening up opportunities for many to get the pet they had always wanted, as work and life have become more flexible for many.

In contrast, the proportion of non-owners contemplating pet ownership is relatively consistent with 2019 results - though many of them have since become pet owners, given the shift in overall pet ownership from 61% to 69%. A small proportion says they are actively considering a pet within a year.

In line with previous findings, families with children under 18 years are more likely to seriously consider getting a pet in the next 12 months (44% vs 25% other household types). Consistent with their overall profile, those in the 'Appeal and Reassurance' segment report the greatest interest and intent in getting a new pet - more so than all the other segments.



Factors influencing pet acquisition



A14B. Of the following factors, please select the top three that would most influence your decision to get a(nother) pet in the future.
Base: Prospective non-owners (*n*=121) and prospective current owners (*n*=752)

Current pet owners and non-owners are largely aligned on all the factors influencing their pet-acquisition decision - chief among them the purchase price, responsibility and ongoing costs. This is consistent with the most common considerations in 2019 - though participants were asked about all factors rather than top factors, and there was a greater perceptual gap (with non-owners more worried about most things - particularly ongoing costs and being able to take pets on holidays).

Price is a particularly important factor for non-owners (selected as a top-three consideration by 59%, compared to only 35% of current pet owners) - likely due to purchase costs that have surged during the pandemic on the back of an uptick in demand. Conversely, in-the-know pet owners are more likely than non-owners to worry about grooming costs (16% vs 8%), despite this being a lower-order consideration.

Certain pet-free households have additional needs: smaller households are more likely to consider their ability to take a pet on holiday (30% vs 7% of households with at least three people), while households earning more than \$100,000 per annum are more likely to be concerned about the potential damage a pet can do to their home (19% vs 5% households earning less than \$100,000 per annum).

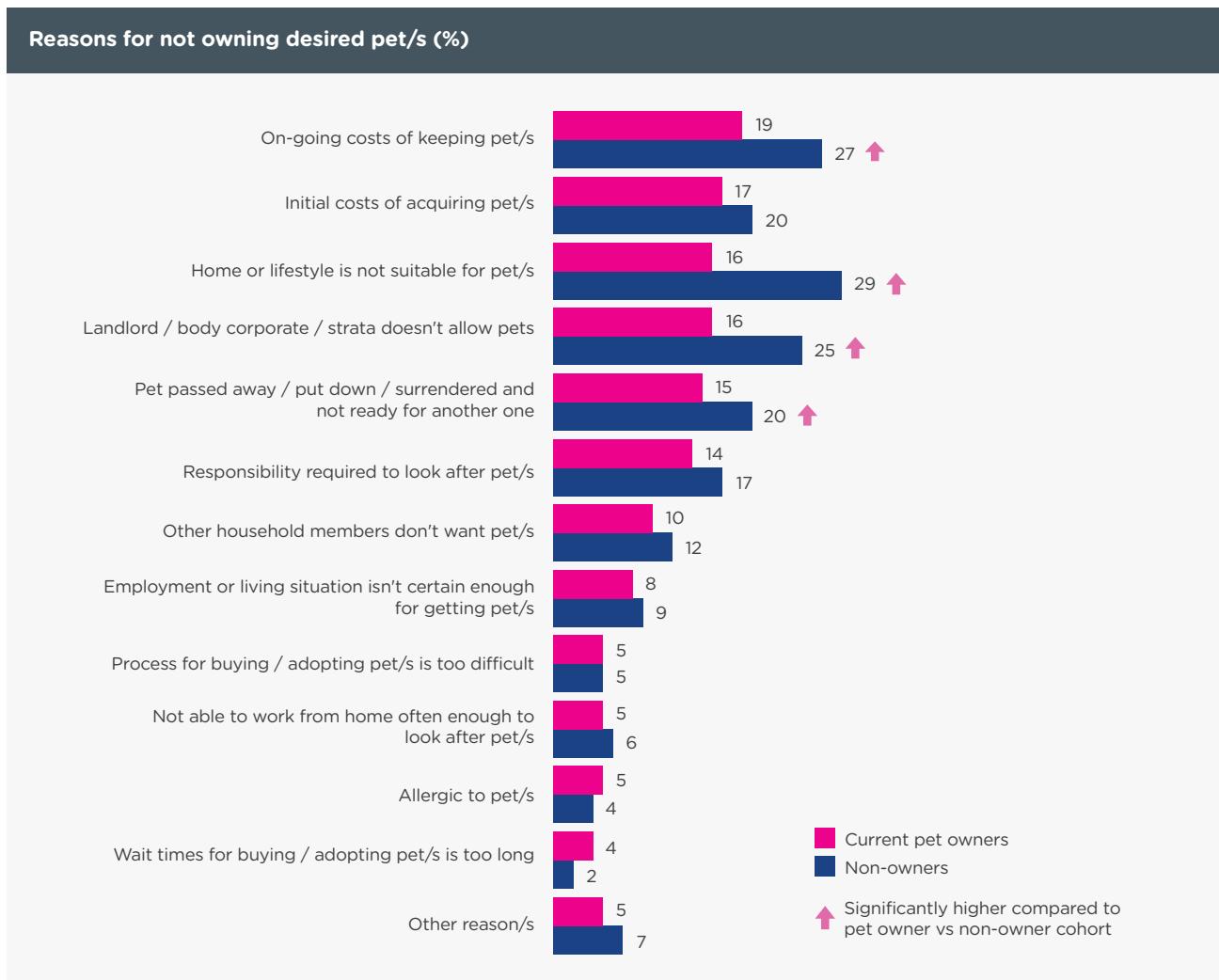
Among current pet owners, the 'Appeal & Reassurance' segment is much more concerned about pet upkeep (e.g. cleaning up after their pets, keeping pets groomed), the cost of boarding services, potential damage to their home, and housing restrictions (e.g. strata laws). In contrast, both the 'Care & Quality' and 'Simplicity & Reliability' segments are more likely to say that none of these issues matters to them - in line with their overall positivity as pet owners.





Barriers to pet ownership

Beyond broad considerations, the survey participants were also asked to consider specific reasons why they do not currently have their desired pet.



A10C. What are the reasons you do not currently have the pet/s you would like to have? Base: Prospective non-owners ($n=436$) and prospective current owners ($n=1,491$)

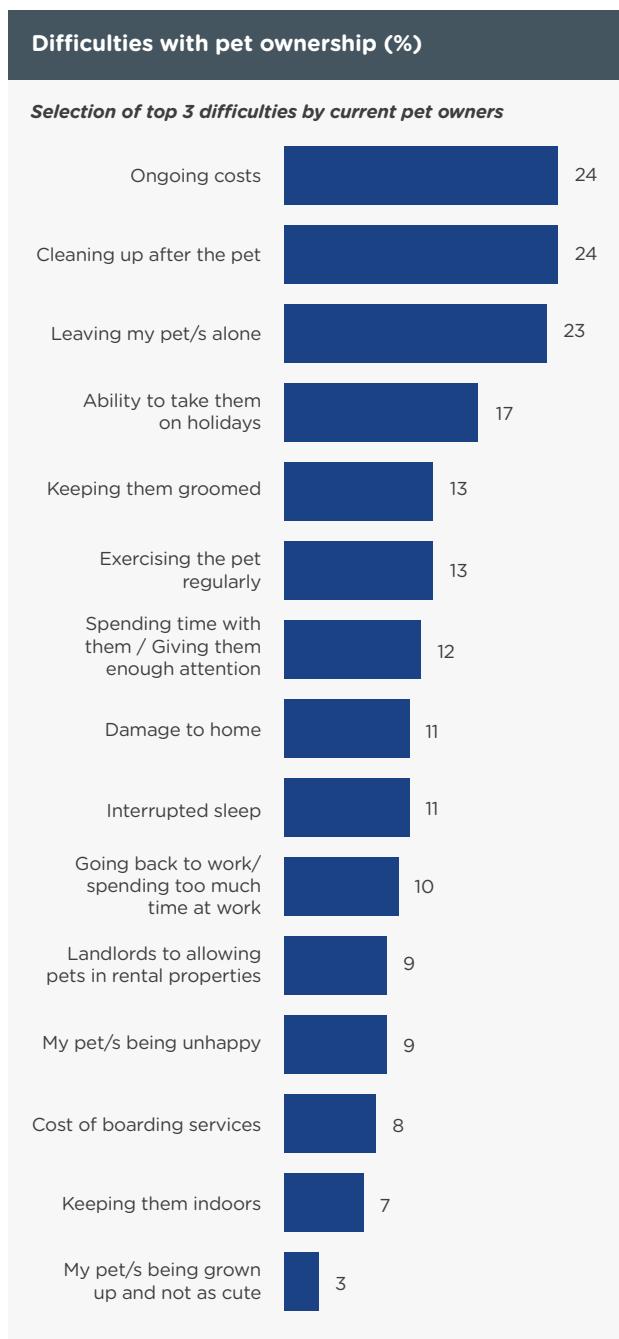
The top barriers are similar for current owners and non-owners - though non-owners are much more likely to cite unsuitable living arrangements (29% vs. 16% among current owners), ongoing costs (27% vs 19%), tenancy restrictions (e.g. landlords, body corporates or strata laws - 25% vs 16%), and not yet feeling ready after a previous pet had passed away (20% vs 15%). The acquisition costs and the required responsibility are also among the top barriers for both cohorts.

Although it is a mid-level barrier overall, disagreement with other household members is more likely to be prominent in pet-free couple-only households (22% vs 6% other households) and households with a member who requires regular care (25% vs 10%).

Meanwhile, limitations on pet ownership due to landlords, strata laws or body corporate rules continue to disproportionately impact renters and apartment dwellers, despite recent reforms around the country to minimise tenancy discrimination based on pet ownership. Half of those living in apartments (51%) still feel they can't get the pet they want due to these restrictions (compared to 11% of those living in houses), while 42% of renters (vs 8% of homeowners) also experience this setback.

At the same time, those from CALD backgrounds continue to have heightened concerns about ongoing costs (34% vs 23% from non-CALD backgrounds) and responsibilities (24% vs 13%). They are also more likely to be concerned about the stability of their employment or living situation (14% vs 5%) - a sense of precariousness that the COVID-19 pandemic has perhaps exacerbated.

Challenges in pet ownership



F13B. What are the top three difficulties that you experience with pet ownership? Base: All current pet owners (n=1,724)

Around **79%** of pet owners today acknowledge experiencing at least some difficulties with pet ownership – up significantly from 66% in 2019

Despite extolling the benefits of pet ownership, 79% of current owners acknowledge experiencing at least some difficulty. This is up from 66% in 2019 - perhaps spurred by some combination of pandemic challenges, cost-of-living pressures and an evolving public understanding of responsible ownership. The boom in less experienced pet owners also plays a role, with 88% reporting some difficulty compared to 71% of more experienced owners.

When asked to consider their top three difficulties, pet owners focused equally on ongoing costs, cleaning up after their pets, and leaving their pets alone. A slightly different question was asked in 2019, focusing on all difficulties rather than the top ones - though costs and cleaning were still key issues, alongside being unable to take pets on holidays. However, in a post-pandemic environment, it is clear that leaving pets alone has emerged as a greater concern - especially with anecdotes of many dogs and cats becoming so accustomed to having their owners around most of the time.

The 'Simplicity & Reliability' segment is likelier to say they don't experience any difficulties. Difficulties vary for the others: the 'Care & Quality' cohort is more likely to worry about the happiness and wellbeing of their pets, the 'Affordability & Convenience' group is more likely to be concerned with keeping their pet indoors, and the 'Appeal & Reassurance' segment is more likely to worry about a range of issues - including pets not being allowed in rental properties, returning to work and the cost of boarding services, keeping their pets happy and groomed, and their pets growing up and no longer being as cute.

Suitable living arrangements

As pet ownership in Australia boomed throughout the COVID-19 pandemic, the impact was also realised in the real estate sector. In 2020, "pet-friendly" came in as the 5th most popular keyword on realestate.com.au² having not featured in 2019's top ten terms. In 2022, Australian rental vacancy rates are 0.9%, the lowest levels since 2006³, while rents are growing strongly. Finding suitable pet friendly accommodation can be challenging in highly competitive rental markets, with lessors often seeing pets as a source of property risk.

The Australian Housing and Urban Research Institute published a study on the policy and regulatory setting that shape housing options available to households that own companion animals. The report concluded that while some jurisdictions are moving towards more pet-permissive policy development and practice models, many barriers remain in access, mobility/transition and exit pathways for households with companion animals⁴.

² www.realestate.com.au/news/pet-owners-fall-head-over-paws-for-the-purrfect-home

³ sqmresearch.com.au/graph_vacancy.php?national=1&t=1

⁴ Stone, W., Power, E.R., Tually, S., James, A., Faulkner, D., Goodall, Z. and Buckle, C. (2021) *Housing and housing assistance pathways with companion animals: risks, costs, benefits and opportunities*, AHURI Final Report No. 350, Australian Housing and Urban Research Institute Limited, Melbourne, www.ahuri.edu.au/research/final-reports/350, doi: 10.18408/ahuri5121601



4.

Putting a value on pets



If the amount of money spent indicates the value we place on our pets, they could be considered priceless.

We are now estimated to be spending over \$33 billion annually to keep our pets fed, healthy and well-accessorised - with food representing 51% of all expenditure, followed by vets at 14%.

The cost of acquiring a dog or a cat soared following the onset of the pandemic, with newer owners reporting prices around double those of the pre-March 2020 world. Indeed, 34% of dogs now cost more than \$2,000 vs 16% pre-pandemic, and 11% of cats now cost more than \$1,000 vs 8% pre-pandemic.

In deciding what to feed our pets, we place a premium on quality ingredients and whether our pets like the taste - as much as price and value for money. Supermarkets and pet shops remain the top sources of pet food, though retail stores are increasingly popular for pet products and accessories.

Acquiring our pets

The cost of acquiring Australia's most popular pet types continues to climb, with notable price jumps over the pandemic. The only exception was a temporary drop in the reported cost of cats at the outset of the pandemic - perhaps due to an uptick in rescues and adoptions.

The cost of obtaining dogs	Time period obtained			
	Pre-March 2020	March-December 2020	2021	2022
Obtained for free (% of all dogs)	22% (n=773)	12% (n=137)	11% (n=222)	27% (n=83)
Average cost (excl. "nothing")	\$930 (n=605)	\$1,433 (n=120)	\$1,506 (n=197)	\$1,793 (n=61)

D5B. How much did you purchase [dog] for?

In 2022, the average reported price for dogs was \$1,793 - almost double the average of \$930 for all dogs obtained before the pandemic. Indeed, 34% of all dogs bought after the pandemic have cost \$2,000 or more (for those who paid anything) compared to 16% pre-March 2020. At the other end of the scale, the proportion of dogs bought for less than \$500 dropped from 45% to 36%.

In total, 20% of all pet dogs were obtained for free - most commonly through family, friends or neighbours. This has dropped following the onset of the pandemic, from 22% pre-March 2020 to 15% last year. However, based on the experiences of 83 people who acquired a dog this year, there may be a slight resurgence in dogs being given away for free (27%) - perhaps further underscoring the end of pandemic peak demand.

The cost of obtaining cats	Time period obtained			
	Pre-March 2020	March-December 2020	2021	2022
Obtained for free (% of all cats)	44% (n=500)	37% (n=110)	30% (n=165)	38% (n=63)
Average cost (excl. "nothing")	\$394 (n=278)	\$289 (n=69)	\$530 (n=112)	\$804 (n=36)

C4B. How much did you purchase [cat] for?

Meanwhile, the increased cost of cats has been just as dramatic, doubling from \$394 for all pre-pandemic cats to \$804 in 2022. Around 11% of all cats bought during the pandemic have cost \$1,000 or more (for those who paid anything) - compared to 8% pre-March 2020. At the other end of the scale, the proportion of cats bought for less than \$200 also dropped from 51% to 47%.

Notably, 40% of all pet cats were obtained for free - most commonly through social networks or adopted as strays. As with dogs, this dipped after March 2020 - from 44% pre-pandemic to 34% over the last couple of years. And, per dogs, there are signs this may be reversing - based on the experiences of 63 people who acquired a cat this year, 38% of whom did so for free.



Owners of other animal types were asked how much they had spent in the previous 12 months to ‘replenish’ their animals. While most reported no expenditure, an estimated \$364.6 million was spent on new pets across these four categories – primarily birds and fish.

Cost of new animals in the past 12 months	Fish (n=217)	Birds (n=208)	Small mammals (n=69)	Reptiles (n=69)
Spent money on new animals	22%	13%	6%	6%
Average household spend	\$92	\$226	\$16	\$16
Extrapolated national spend	\$112.8m	\$240.8m	\$6.0m	\$4.9m

B6X, C17X, D18X, E3X, H6X, I6X. In the last 12 months, have you spent money on any of the following for your [pet/s]?

Base: Pet owners (n=1,724). Extrapolations based on survey data and ABS population and household estimates. See technical notes for further information. *NB: Averages presented in this table include those who spent nothing, for ease of extrapolation to the broader population.



Buying a pet online

As demand for pets increases, so can the risk of scams. Prospective owners should make sure they choose a reputable breeder or rescue shelter, ensure that they can see the animal in person, and check the animal's worming and vaccination status.

Since 2016, several jurisdictions have also updated requirements for online sales or advertisements to include identification information, such as a microchip number for online sales of companion animals⁵.

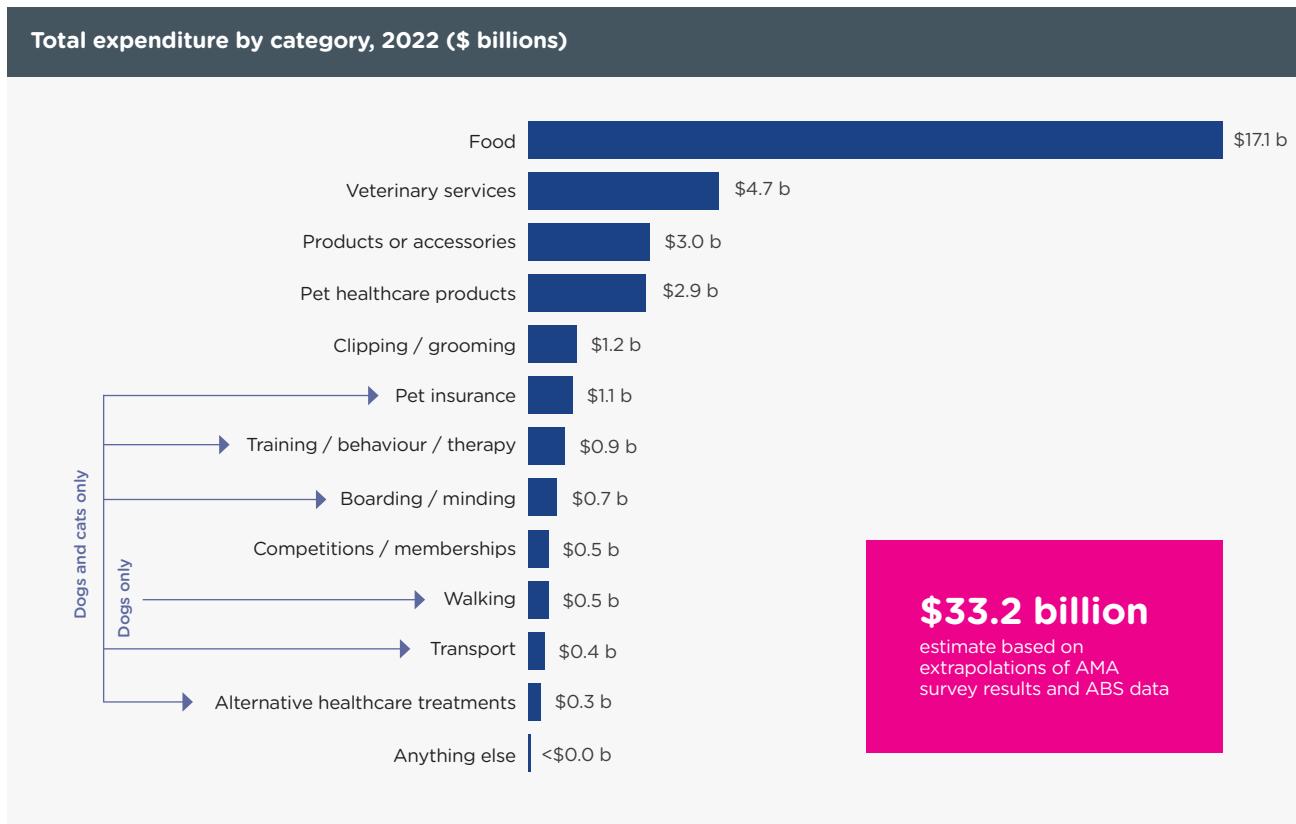
Prospective pet owners should also consider the merits of getting a vet check on a new pet prior to purchase. This can help identify any breed- or health-related concerns.

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 status⁶.

⁵NSW Office of Local Government, *Responsible pet ownership*, 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*, agriculture.vic.gov.au/pets/domestic-animal-businesses/breeding-and-rearing-businesses/microchip-numbers-needed-in-pet-sale-advertisements

⁶Vet Voice, *Buying pets online: what you see is not always what you get*, www.vetvoice.com.au/media-releases/buying-pets-online-what-you-see-is-not-always-what-you-get/

On-going expenditure



Extrapolations based on survey data and ABS population and household estimates. See technical notes for further information and caveats.

Self-reported expenditure on pet-related products and services is currently estimated at \$33.2 billion across the six most common pet types. Most of this is on dogs and cats, accounting for 89% of the total.

As expected, food continues to top the list, representing 51% of total spending – followed by veterinary services (14%), pet products and accessories (9%) and pet healthcare products (9%). The remainder of the total spend is virtually all attributable to dogs and cats – including clipping and grooming (4%), pet insurance (3%), and training, behaviour and therapy services (3%).

As outlined in the first methodology note in this section, the approach to estimating pet owner expenditure has been revised this year, introducing a break in the time series. This new approach was piloted in 2021's *Pets and the Pandemic* study, focusing only on dogs and cats.

Compared to the 2021 estimates, spending on dogs has held steady at \$20.5 billion – with an uptick in spending on food, veterinary services, products and accessories, clipping and grooming, and alternative healthcare treatments offsetting reduced spending on all other categories. Some of this shift is likely driven by increasing cost-of-living concerns, though further investigation would be required.

The estimated total spend for cats decreased from \$10.2 billion last year to \$9.1 billion. While this may be partly due to ‘noise’ in the data being amplified when extrapolated to population-wide levels, the 659 cat owners who provided spending estimates indicated they have reigned in spending across most categories – especially veterinary services, which had recorded atypically high spending in the 2021 survey.

Methodology note 1:

This study maintained the revised methodology for deriving household expenditure first introduced in the 2021 *Pets and the Pandemic* report – addressing potential underestimation in previous years. Where survey participants before 2021 had selected their spend in each category from pre-coded dollar ranges, they are now asked first to choose their average purchase frequency – and then how much they would typically spend each time. This methodological revision provides more accurate measures of household spending – but as a consequence, comparisons to previous industry estimates should be made with caution.



Average annual household spend, 2022 (\$)	Dogs (n=924)	Cats (n=659)	Fish (n=217)	Birds (n=208)	Small mammals (n=69)	Reptiles (n=69)
Food	\$2,024	\$1,595	\$510	\$1,396	\$936	\$650
Veterinary services	\$631	\$388	\$115	\$156	\$159	\$30
Products or accessories	\$349	\$181	\$179	\$318	\$134	\$195
Pet healthcare products	\$323	\$280	\$107	\$120	\$158	\$257
Clipping / grooming	\$196	\$70	Not asked	Not asked	Not asked	Not asked
Pet Insurance	\$152	\$94	Not asked	Not asked	Not asked	Not asked
Training / behaviour / therapy	\$166	\$22	Not asked	Not asked	Not asked	Not asked
Boarding / minding	\$104	\$53	Not asked	Not asked	Not asked	Not asked
Competitions / memberships	\$71	\$6	\$45	\$49	\$4	\$149
Walking	\$95	-	Not asked	Not asked	Not asked	Not asked
Transport	\$70	\$16	Not asked	Not asked	Not asked	Not asked
Alternative healthcare treatments	\$65	\$7	Not asked	Not asked	Not asked	Not asked
Anything else	\$2	\$6	\$0	\$0	\$0	\$0
Total per household	\$4,247	\$2,718	\$957	\$1,328	\$1,390	\$1,281
Total per animal	\$3,218	\$1,715	\$104	\$360	\$581	\$751

B6X, C17X, D18X, E3X, H6X, I6X. In the last 12 months, have you spent money on any of the following for your [pet/s]?
 B6B, C17B, D18B, E3B, H6B, I6B. In the last 12 months, how often did you typically spend money on [each selected item for your [pet/s]]?
 B6C, C17C, D18C, E3C, H6C, I6C. How much did you typically spend in the time period you've indicated above? Base: Pet owners (n=1,724).



Methodology note 2:

The averages presented in this table include pet owners who spent nothing in some categories for ease of extrapolation to the broader population on the next page. For example, 98% of dog owners and 99% of cat owners reported spending money on food in the last 12 months, whereas only 52% of dog owners and 41% of cat owners reported spending money on vet bills. This is why the averages presented may appear lower than expected.

Across most pet types, our four segments displayed notable differences in their consumption patterns.

The 'Appeal & Reassurance' and 'Care & Quality' segments were the most willing to spend money across multiple product and service categories. However, while the 'Care & Quality' segment is more likely to concentrate on acquiring essential items and services for their pets (food, veterinary services, products and accessories, clipping and grooming, training, and pet insurance), the 'Appeal & Reassurance' segment is more likely to invest in more discretionary categories (competitions and club memberships, transport, alternative health treatments, dog-walking).

Indeed, the 'Appeal & Reassurance' segment reported much higher quantities of average spending across all product and service categories - often more than double the average spending of the other segments. In contrast, the 'Simplicity & Reliability' and 'Affordability & Convenience' segments are relatively less likely to spend money in most categories - though the former cohort is almost as likely as the 'Care & Quality' cohort to spend on pet healthcare products.

Sources of pet food

Pet owners estimated spending over \$17 billion on food for their pets over the past 12 months - with the majority from supermarkets and pet stores (in-person and online). These sources stand out as the most popular food sources regardless of pet type. Supermarkets and pet stores also tend to be the preferred sources for all our pet owner segments - except for the 'Appeal & Reassurance' segment, who are more likely to shop everywhere but in supermarkets.

Where owners source their pet food has remained relatively consistent over the last three years. However, fewer owners are now buying food for their pets from the supermarket: from 74% to 64% of dog owners and from 84% to 70% of cat owners.

Dogs are also being fed less human food or leftovers than three years ago (20%, down from 26% in 2019); instead, they're more likely to be eating food sourced from the vet (15%, up from 10%). Meanwhile, fish owners are making fewer trips to pet shops and specialty stores in-person (46%, down from 67%) - now being more likely to turn to vets (9%, up from 1%), making fish food at home (7%, up from 2%), giving fish leftover 'human food' (4%, up from 1%).

This year's strengthened focus on online shopping revealed that 30% of dog owners and 30% of cat owners are buying pet food through online channels - primarily online pet shops, followed by online subscription services. Compared to owners of other pet types, fish and bird owners are the least likely to use online sources (22% and 25%, respectively), while small mammal owners are most likely (36%).



Sources of pet food over the past 12 months (%)	Dogs	Cats	Fish	Birds	Small mammals	Reptiles
Supermarket	64	70	41	50	48	13
Pet shop / pet speciality store - in person	32	27	46	41	35	42
Pet shop / pet speciality store - online	24	25	18	20	30	20
I give them human food / leftovers	20	11	4	13	21	15
I make food at home	17	5	7	7	15	15
Butcher	16	6	0	0	0	0
Vet	15	12	9	8	13	4
Retail store	11	14	10	12	12	11
Online subscription with regular deliveries	8	8	5	9	8	13
I collect food from the wild	0	0	5	10	14	15
Somewhere else	0	0	1	4	2	2

B4, C15, D16, E1, H3, I4. From which of these places have you bought / obtained [pet] food in the past 12 months? Base: Pet owners (n=1,724).



Quality pet food: What to look for

Australia has a voluntary pet food standard – AS5812 Manufacturing and Marketing of Pet Food – for cat and dog food.

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;
- metabolisable energy, minimum percentage of crude protein and crude 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.

Primary source of majority of food items	Wet / retorted food	Chilled / fresh food	Dry food	Baked / cold-pressed food	Air / freeze-dried food	Treats
Supermarket	47	35	50	31	29 ↓	47
Pet shop / pet speciality store - in person	11	9	14	12 ↓	9	14
Pet shop / pet speciality store - online	7	5	12	6	7	10
Make it for them at home	3	4	2	3	2	2
Retail store	3	2	4	3	3	4
Online subscription with regular deliveries	3 ↓	2	3	2	2	3
Butcher	3	7	1	1	2	3
Vet	2	3 ↓	5	5	3	4 ↓
Give them human equivalents	2	3	1	2	2	2
Collect it from the wild	1	1	1	1	1	1
Somewhere else	0	0	1	0	0	0
I don't buy those things for my pet/s	17	28	6	34 ↑	39 ↑	9

NB: Arrows indicate a significantly higher or lower result than the 2021 result.

F28. Where do you purchase or get the majority of each of the following categories for your pet/s? – Wet/retorted food (e.g. canned, pouches or trays, puree, broths, soups, pastes), Chilled/fresh food (e.g. pet meat, meatballs, rolls), Dry food (e.g. kibble), Baked or cold-pressed food (e.g. soft pellets), Air/freeze-dried food, Treats. Base: Pet owners (n=1,724)

Supermarkets remain the most common place for owners to purchase the majority of all types of pet foods, including treats. Over the last 12 months, it has become an even more popular source of air- and freeze-dried food (29%, up from 23%).

Pet shops, meanwhile, are growing in popularity as a source of baked and cold-pressed food (12%, up from 9%). Online shopping still lags behind in-store visits, but the gap is negligible for many categories. And while online subscription services are still not used by pet owners for most of their food purchases, these are growing in popularity as a source of wet and retorted foods (e.g. cans, trays - 3%, up from 1%).

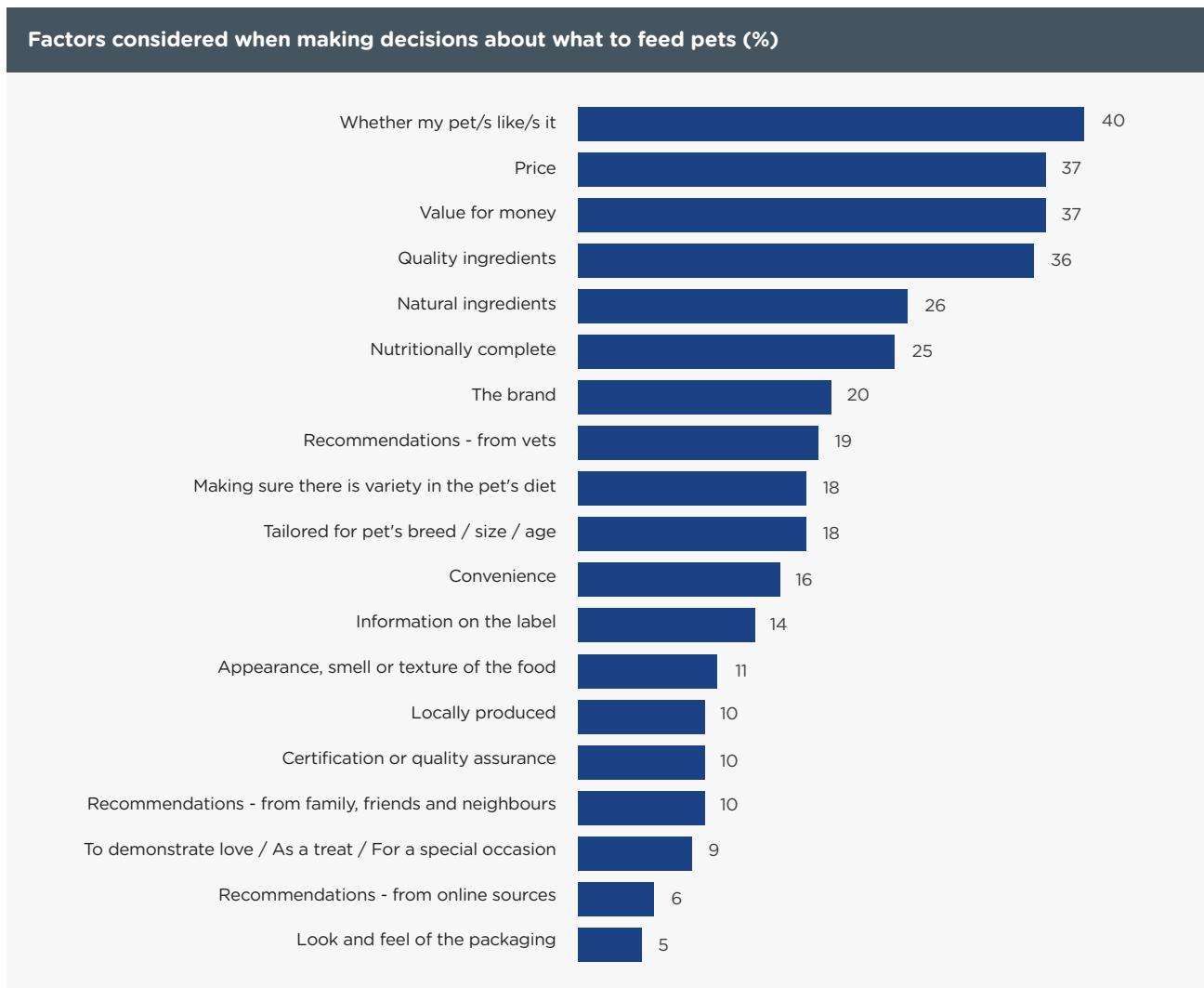
At lower levels, pet owners rely on retail stores such as Kmart and The Reject Shop, their local butcher, cooking at home, giving their pets leftover 'human food', and collecting food from the wild. Compared to last year, vets are increasingly used by a minority of pet owners for most of their chilled and fresh food (e.g. meatballs - 3%, up from 1%) and treats (4%, up from 2%).





Food choice considerations

When thinking about what to feed their pets, owners say they are most likely to consider four things: the pet's food preferences, the price, the perceived value for money, and the quality of the ingredients.



F29. Which of the following factors do you consider when making decisions about what to feed your pet/s? Base: Pet owners (n=1,724)

Those who are more concerned about their pets' preferences include more experienced pet owners (50% vs 28% less experienced owners), people aged 40+ years (49% vs 29% younger people), women (46% vs 33% men), and households with no children (43% vs 36% households with children). Perhaps reflecting the age-old 'fussy-cat' quandary, cat owners are more likely to make purchase decisions based on what their feline companions like to eat (42% vs 36% owners of other pet types).

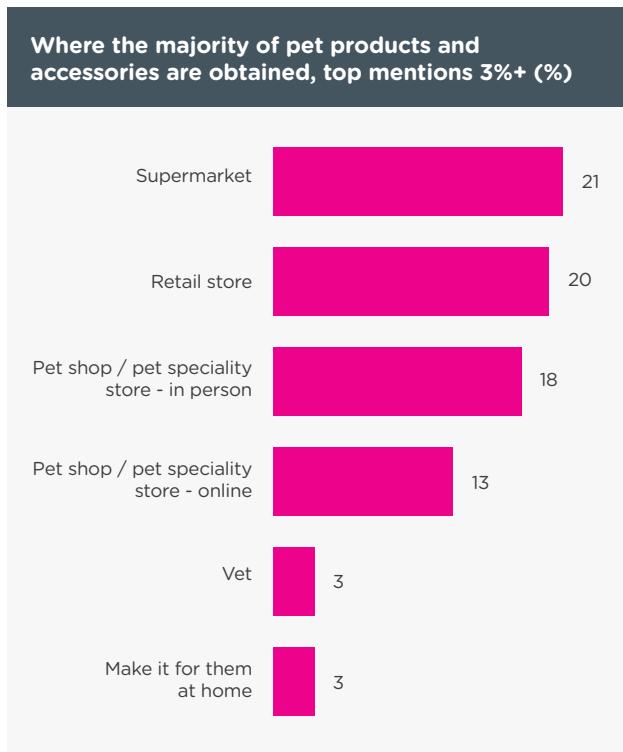
Not surprisingly, those more likely to be especially concerned with price and value for money are households feeling more financially vulnerable (47% concerned with price and 43% concerned with value for money - compared with 33% and 34%, respectively, of those less financially vulnerable). Results were similar for lower-income households - though we note that not all financially vulnerable households are lower-income, as some higher-income households are financially overcommitted and equally stressed.

Across the board, several cohorts are more likely to consider almost all factors - suggesting they are perhaps reading ingredient lists very closely! These include more experienced pet owners, people over 40 (i.e. Gen X and Boomers+), women, and the 'Care & Quality' segment. In line with their overall profile, the 'Affordability & Convenience' segment is most likely to consider the price (39%) and value for money (35%) - far above their pets' food preferences (21%).

The 'Simplicity & Reliability' segment is more likely than others to focus on quality - including ensuring quality ingredients, natural ingredients, nutritionally complete food, and a varied diet. This segment is also especially likely to consider their pet's preferences, value for money, and the brand. Meanwhile, the 'Appeal & Reassurance' segment is more likely to focus on locally produced food, certification and quality assurances, online recommendations, and the look and feel of the packaging.

Products and accessories

The Australian pet product and accessories market is estimated to have reached almost \$3 billion in the last 12 months. Over half of this is attributed to dog owners, who reported spending almost \$1.7 billion - followed by cat owners (\$610 million) and bird owners (\$339 million).



F28. Where do you purchase or get the majority of each of the following categories for your pet/s? – Products and accessories.
Base: Pet owners (n=1,723)

Most of these sales are via supermarkets, retail stores such as Kmart and The Reject Shop, and pet shops (in-person and online). Retail stores, in particular, appear to have risen in popularity compared to 2019, where they trailed supermarkets and pet shops.

In line with 2019 results, cat owners are more likely to buy products and accessories from supermarkets (25% vs 19% of other pet owners), while dog owners are more likely to prefer retail stores (23% vs 19%) and pet shops (19% vs 17% brick-and-mortar, 14% vs 11% online).

Across our pet owner segments, the 'Affordability & Convenience' cohort is more likely than others to make these purchases in supermarkets (29% vs 17%) as part of their grocery shopping. The 'Care & Quality' cohort prefers retail stores (34% vs 15%) and pet shops (27% vs 14% in person, 20% vs 10% online) - while the 'Appeal & Reassurance' cohort is more likely to buy these from the vet (10% vs 2%), make these at home (7% vs 2%), and add them to online subscription orders (6% vs 1%). Consistent with their overall attitudes, the 'Simplicity & Reliability' cohort is the most likely to say they do not buy pet products or accessories (36% vs 9%).





5.

Managing pet health



Australians are investing more than ever in our pets' health - spending an estimated \$4.7 billion in vet visits, \$1.1 billion in insurance for dogs and cats, and \$2.9 billion in healthcare products.

Treatments for fleas, worms and ticks continue to dominate sales, though supplements are increasing in popularity.

Vets remain the most trusted source of advice, and 84% of dog owners and 69% of cat owners taking their animals to the vet in the last 12 months - mostly for general check-ups and vaccinations. However, 68% say they had considered not going to the vet when they needed to, driven partly by cost considerations.

Perhaps due to a combination of cost, convenience and COVID-19, the proportion of dogs and cats that are de-sexed has fallen since 2019 - from 81% to 73% for dogs and 89% to 83% for cats. Micro-chipping rates have also dropped - from 86% in 2019 to 82% in 2022 for dogs and 77% to 74% for cats.

The role of vets

Veterinary services remain the second largest category of ongoing expenditure for pet owners, after food. Australian pet owners spent an estimated \$4.7 billion at the vet in the last year - with signs that perhaps some owners are noticing more health issues due to spending more time with their pets (particularly cats).

Vet expenditure	Dog Owners	Cat Owners	Fish Owners	Bird Owners	Small mammals Owners	Reptiles Owners
Spent money on veterinary services in the last 12 months	52% (n=924)	41% (n=659)	5% (n=217)	15% (n=208)	26% (n=69)	11% (n=69)
Average household spend among those who visited the vet	\$1,220 (n=449)	\$936 (n=257)			Sample sizes too small to report on	

B6X, C17X, D18X, E3X, H6X, I6X. In the last 12 months, have you spent money on [veterinary services] for your [pet/s]?

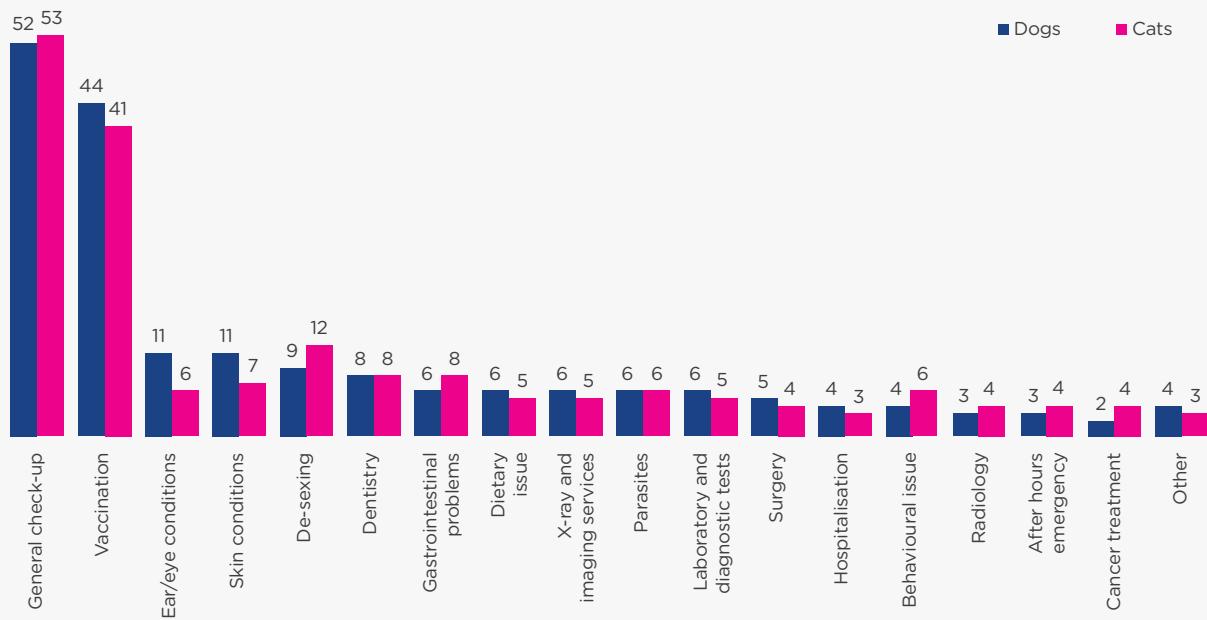
D18C, C17C, E3C, B6C, I6C, H6C. You've told us that you typically spend money on veterinary services [insert relevant frequency of purchase]. How much did you typically spend in the time period you've indicated above? Base: Pet owners (n=1,724).

Within the previous 12 months, 84% of dog owners and 69% of cat owners reported having taken their pet to the vet - though only 52% of dog owners and 41% of cat owners said they spent any money on veterinary services. This difference may be a product of pet insurance covering vet visits instead of owners having to pay out of pocket - and potentially, for some, free diagnostic telehealth consultations that resulted in no further follow-up.

Owners who are more likely to take their pets to the vet, regardless of pet type, tend to be from higher-income households - as well as those who are homeowners, employed, and university educated.

Dogs and cats averaged 2.1 and 1.9 vet visits, respectively, in the last year. The most common reasons for both by far were general check-ups and vaccinations.



**Reasons for visiting the vet in the past 12 months - Dogs and Cats (%)**

C14B, D15B. Think about the time/s [cat/dog name] visited the vet in the past 12 months... What was the reason for the visit/s?
Base: Cats who have visited the vet in the past 12 months (n=571), Dogs who have visited the vet in the past 12 months (n=998)



Around 68% of pet owners had considered not going to the vet when needed - or going less often - in the past 12 months - up significantly from an already high 55% in 2021.



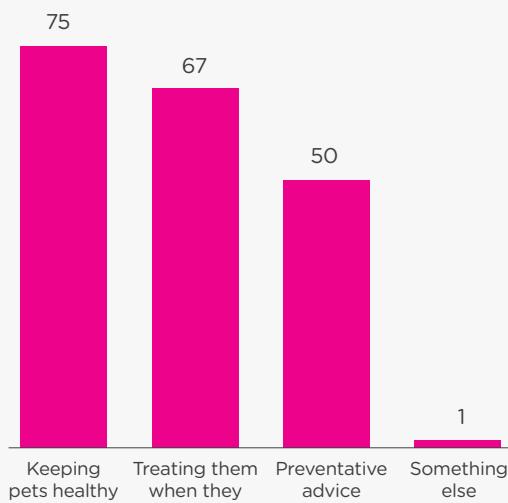
F22. In the last 12 months, did you consider any of the following reasons for not going to the vet - or going to the vet less often?
Base: Pet owners (n=1,723)

68% of pet owners have considered a reason for not going to the vet, or going less often, in the last 12 months - up significantly from 55% in 2021.

Those falling into this camp were most likely to feel that they did not need to. Common reasons included feeling their pets were healthy (24%, up from 20% in 2021), knowing what to do from experience (14%), and confirming with their vets there was no need to visit (11%, up from 7%). These reasons were notable for the 'Care & Quality' segment and, to a lesser extent, the 'Simplicity & Reliability' segment.

However, some of this uptick had been driven by cost concerns - including being unable to afford the consultation fees (11%, up from 8% in 2021), the medicines or procedure (steady at 9%), or the cost of travel to the vet (6%, up from 4%). Other lower-order barriers included the availability of convenient times and appointments, not having time or transport, and not having a trusted local vet. Younger people, less included pet owners, those living in metropolitan areas - and, by extension, the 'Appeal & Reassurance' segment - were all more likely than others to cite these barriers.



**Perceived role of vets, 2022 (%)**

F1. What do you see as the role of vets? Base: All current pet owners (n=1,724)

Today, the predominant view of the role of vets is as a service to keep pets healthy, followed by treating pets when they are sick - while one in two pet owners also look to vets for preventative advice.

A very small number of participants wrote in additional responses. Some noted that vets play an important role in providing dignity to animals and reassurance to owners. Others, however, felt the vets they had dealt with were too profit-driven and offered poor value for money. The Australian Veterinary Association notes that similar to human health services, veterinary services are expensive to deliver and fees can be perceived as expensive when compared with the cost of human healthcare, which is subsidised by governments through Medicare and private health insurance⁷.



Preventative care

Taking a preventative approach to pet healthcare will give your pet the best chance at a long and healthy life. Ensuring your pet has regular general check-ups allows a skilled veterinarian to look out for and assess the risk of a variety of problems such as ear infections, eye issues, dental issues, skin problems, heart disease, undertake an abdominal palpation and make an assessment on musculoskeletal issues like osteoarthritis.

There can be fatal repercussions of failing to protect pets from preventable infectious diseases such as parvovirus. Talking to your veterinarian about nutrition, dental care, vaccinations and heartworm/flea/tick prevention will help you protect your pet.

Veterinarian workforce

The Australian Veterinary Association has noted a severe veterinary workforce shortage which has been exacerbated by COVID-19 and an increase in pet ownership.

Although in 2021, veterinarians were included on the Priority Migration Skilled Occupation List—meaning that employer-sponsored nomination and visa applications for veterinarians will be given priority processing, veterinarians remain an occupation considered to be in shortage in the 2022 Skills Priority List report. In 2022, for the first time, veterinary nurses have also been assessed as being in shortage.

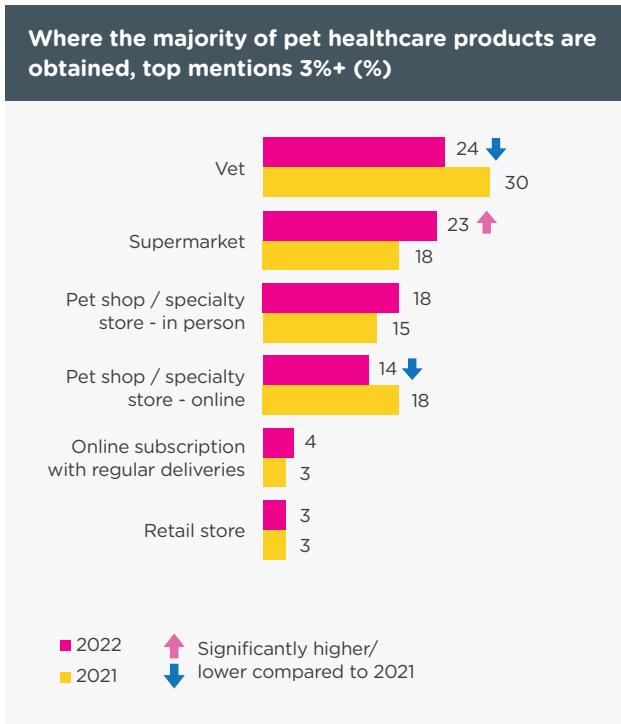
Telehealth for pets

Telehealth for pets can be a useful adjunct to provide care in situations where there is an established veterinarian-client-patient relationship. It can also be useful in emergency health situations where human interaction is not advisable, as was seen in the COVID-19 pandemic. Although pet owners would like to see more telehealth offerings, by veterinarians, in Australia there are strict state-based regulations around the provision of telehealth services for animals that veterinarians must abide by.

⁷Vet Voice, *Frequently asked questions about the cost of veterinary health care*, www.vetvoice.com.au/ec/pet-ownership/cost-of-veterinary-health-care

Healthcare products

Pet healthcare products such as dietary supplements and treatments for fleas, ticks and worms make up 9% of all ongoing spending by pet owners - equating to an estimated \$2.9 billion in sales per annum.



In line with the 2019 survey findings, the top sources of pet healthcare products are vets, supermarkets, and pet shops. Over the last 12 months, however, there has been a decrease in owners looking to their vets for the majority of healthcare products (24%, down from 30%) - instead, vets are now on par with supermarkets (23%, up from 18%). Meanwhile, there are also indications that a greater proportion of owners are returning to pet shops in person rather than shopping online (14%, down from 18%).

In total, 18% of pet owners buy most of their pets' healthcare products online, including 4% via online subscriptions that ship regular deliveries. Flea and worming treatments remain the top healthcare products bought online (65% each), though this is down from 2019 (82% and 76%, respectively). This may be due to a shift towards in-person purchases for these products, or it may align with industry reports that suggest pet owners are 'stretching out' healthcare products in response to cost-of-living pressures.

Meanwhile, there has been an uptick in online purchases of dietary supplements for pets - rising from 14% to 25%. This appears to be led by Gen Z and Millennial owners (33% vs 17% older generations) - particularly the 'Appeal & Reassurance' segment (45% vs 18% other segments). Elsewhere, the 'Care & Quality' segment is more likely than others to buy flea, worming and tick treatments online.



Healthcare items purchased online (%)	2019 (n=173)	2022 (n=309)
Flea treatments	82	65 ↑
Worming treatments	76	65 ↑
Tick treatments	59	56
Dietary supplements	14	25 ↓
Other	5	7

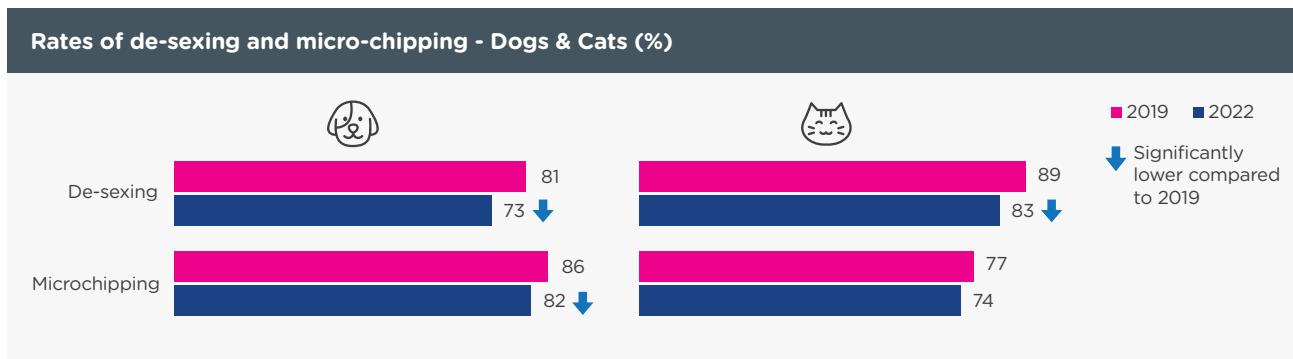
NB: Arrows indicate a significantly higher or lower result than the 2021 result.

F5. What pet healthcare products do you buy online? Base: Pet owners who have purchased healthcare products online (n=309)

Protecting your pet from parasites such as ticks, fleas, heartworm, lungworm or intestinal worms requires careful product application. Pet owners should take care to read product use instructions and reapplication schedules. Never seek to stretch out applications by applying less frequently than prescribed, as this limits the protection provided. If in doubt, always consult with your veterinarian for specific advice 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 that when used in accordance with instructions, they are effective and safe for use.



De-sexing and microchipping



C5, D6. Has [cat/dog name] been de-sexed? C6, D7. Has [cat/dog name] been microchipped?
Base: Cats (2019: n=705, 2022: n=840), Dogs (2019: n=1,013, 2022: n=1,215)

De-sexing

The proportion of de-sexed dogs and cats has fallen significantly since 2019, from 81% to 73% for dogs and 89% to 83% for cats. There are few demographic differences between pet owners who do and do not de-sex their animals - though older people are more likely to have done so.

De-sexing an animal before it is sold or given away is compulsory in some states - including for cats in Western Australia⁸, and both cats and dogs in South Australia⁹ and the Australian Capital Territory¹⁰ - while Queensland, New South Wales and Victoria encourage pet owners to de-sex their pets. (We note this does not bear out in the survey data, where dog and cat owners in different jurisdictions were just as likely 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 in reducing the number of abandoned animals.

Over the four years to 2020-21, the number of dogs received by the RSPCA across Australia has halved - from 44,770 in 2016-17 to 22,311; nine in ten are typically reclaimed, rehomed or placed into care, while those euthanised are primarily due to behavioural or medical issues. A similar but more gradual decline is also apparent in the number of cats received, from 53,912 in 2016-17 to 42,572 in 2020-21; around eight in ten are now rehomed, up from seven in ten only four years ago¹¹.

The Australian Veterinary Association also supports the de-sexing of companion animals. The health and behavioural benefits of de-sexing dogs 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;
- Eliminate the 'urge to mount' peoples' legs in male dogs;
- Eliminates the 'heat' cycle in female cats and therefore their efforts to 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 age¹²) 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

⁸ Western Australian Department of Local Government, Sport & Cultural Industries, *Cats and dogs*, www.dlgsc.wa.gov.au/local-government/community/cats-and-dogs

⁹ South Australian Department for Environment & Water, *Your guide to South Australia's new dog and cat desexing laws*, www.environment.sa.gov.au/goodliving/posts/2018/02/desexing-pets

¹⁰ Transport Canberra & City Services, *Animal management within the Act*, www.cityservices.act.gov.au/pets-and-wildlife/domestic-animals/dogs/your-responsibilities

¹¹ RSPCA Australia, *Annual Statistics 2017-18*, www.rspca.org.au/sites/default/files/RSPCA%20Australia%20Annual%20Statistics%202017-2018.pdf

¹² RSPCA Australia, *Costs*, www.rspcansw.org.au/learn/owning-a-pet/costs

Microchipping

Microchipping rates have also dropped – from 86% in 2019 to 82% in 2022 for dogs and 77% to 74% for cats (though this is just within the margin of error and, therefore, only indicative of a potential shift). Dogs in regional areas are more likely than their metropolitan counterparts to have been microchipped (87% vs 80%) – while the opposite is true for cats, with 77% of city cats microchipped vs 63% of country cats.

Microchipping ensures that pets are identified for life and can be reunited with their owners if they are lost, and it can be invaluable following a natural disaster such as a flood or cyclone, where a large number of pets can be displaced. It is also useful in identifying the breeder of a particular pet, especially when some breeders have a lifetime guarantee to re-house a pet if their owner is no longer able to care for it.

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 first¹³.
- 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 old¹⁴.
- In Queensland, dogs and cats born after April 2009 are required to be microchipped prior to sale or transfer – regardless of age and before they are 12 weeks old¹⁵.

- In Western Australia, local governments are given the power to administer and enforce the Cat Act 2011 including identification, registrations and sterilisation¹⁶, and dogs are required to be microchipped by three months of age¹⁷.
- 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 age¹⁸.
- 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 concerns¹⁹, and dogs over six months must be microchipped²⁰.
- In the Australian Capital Territory, cats and dogs must be microchipped – however only dogs are required to be registered²¹.
- In the Northern Territory, the City of Darwin requires microchipping as a condition for registration²².



¹³ NSW Office of Local Government, *Microchipping and registration*, www.olg.nsw.gov.au/content/microchipping-and-registration

¹⁴ Victorian Department of Jobs, Precincts & Regions, *Microchipping information for dog and cat owners*, agriculture.vic.gov.au/livestock-and-animals/animal-welfare-victoria/domestic-animals-act/registration-legislation-and-permits/microchipping-of-dogs-cats-and-horses/microchipping-of-dogs-and-cats

¹⁵ Queensland Government, *Laws for pet owners in Queensland*, www.qld.gov.au/families/government/pets/pet-laws

¹⁶ WA Department of Local Government, Sport & Cultural Industries, *Cats and dogs*, www.dlgsc.wa.gov.au/local-government/community/cats-and-dogs

¹⁷ WA Government, *Dog microchips compulsory from 1 November 2015*, www.dlgsc.wa.gov.au/local-government/community/cats-and-dogs

¹⁸ South Australian Department for Environment & Water, *Understand SA's new pet microchipping laws*, www.environment.sa.gov.au/goodliving/posts/2018/03/microchipping-pets

¹⁹ Tasmanian Department of Primary Industries, Parks, Water & Environment, *Information for cat owners*, www.dpipwe.tas.gov.au/invasive-species/cat-management-in-tasmania/information-for-cat-owners

²⁰ Tasmanian Department of Premier & Cabinet, *Microchipping FAQs*, www.dpac.tas.gov.au/divisions/local_government/legislation/current_legislation/dog_control/micro-chipping_faqs

²¹ Access Canberra, *Pets and wildlife*, www.cityservices.act.gov.au/pets-and-wildlife/domestic-animals/dogs/your-responsibilities

²² City of Darwin, *Pet registration and microchipping*, www.darwin.nt.gov.au/live/pets-wildlife/great-pets-start-with-you/pet-registration-microchipping



Pet insurance

Around 17% of dog owners are paying for pet insurance, down from 30% in 2019, while the proportion of insured cat owners has fallen from 21% to 12% over the same period - with average annual premiums of \$776 per dog and \$535 per cat.

Total pet insurance expenditure is hovering around an estimated \$1.1 billion today - with 70% of this attributable to insurance for dogs. We note that this result, like other expenditure estimates in this report, is extrapolated from spend recall by pet owners and may not align with industry sales data - though these findings may prove a useful indication of the cost of insurance in pet owners' minds.

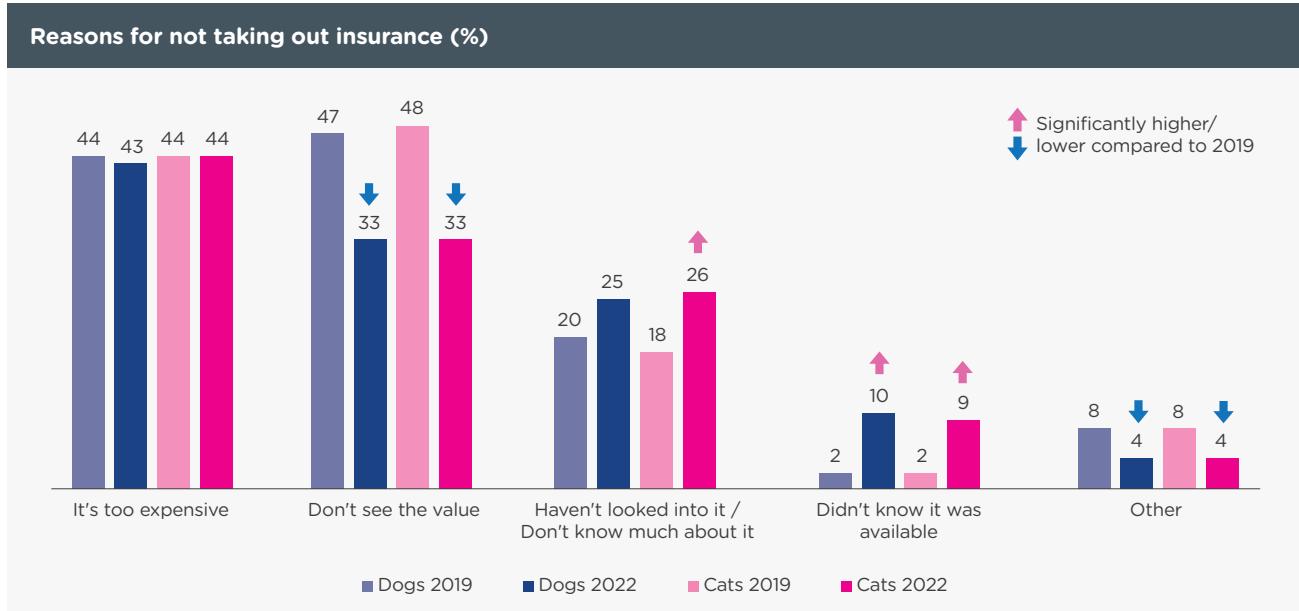
Average household expenditure on pet insurance	Dog Owners	Cat Owners
Households that have pet insurance	17% (n=920)	21% (n=649)
Average premium among those with insurance	\$916 (n=150)	\$795 (n=72)

D18C, C17C. You've told us that you typically spend money on pet insurance [insert relevant frequency of purchase]. How much did you typically spend in the time period you've indicated above?
Base: Cat owners (n=649), Dog owners (n=920)

As noted in past reports, the propensity to insure dogs is linked to the following traits:

- City living (34% among those living in the inner city, falling to 8% among those living in regional or rural areas);
- Those from CALD backgrounds (24% vs 14% of those without CALD characteristics);
- Higher household incomes (24% of those earning \$100,000 or more per annum vs 13% of those on lower incomes);
- Higher education levels (23% with university qualifications vs 12% without);
- Being younger (22% of Gen Z and Millennials vs 13% of those over the age of 40);
- Being employed (21% vs 9% of the rest of the population); and
- Prior experience with pets (20% less experienced owners vs 14% more experienced owners).

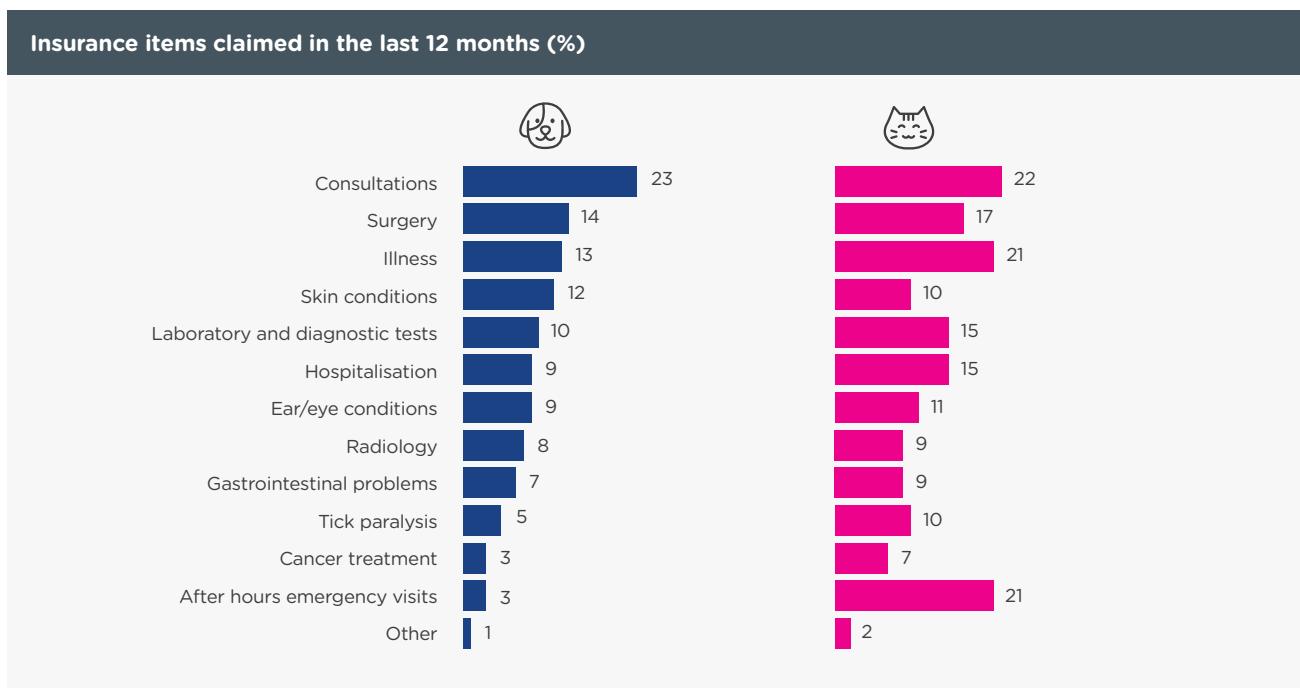
These traits were also largely similar among insured cat owners.



C19, D20. For what reason have you NOT bought pet insurance for your cat/s / dog/s in the last 12 months? Base: Cat owners who haven't taken out pet insurance (2019: n=428, 2022: n=735), Dog owners who haven't taken out pet insurance (2019: n=566, 2022: n=1,013)

For those without pet insurance, cost remains the top reason for their decision - particularly those with lower household incomes or older owners (e.g. the 'Simplicity & Reliability' segment). We note this does not appear to be a question of the value of insurance for many people, as the proportion citing that reason has dropped since 2019. Instead, there is a rise in people not knowing much about pet insurance or knowing it was available at all - especially younger owners (e.g. the 'Appeal & Reassurance' segment).

A small proportion of uninsured pet owners also mentioned common limitations - including their pet not being eligible due to old age or existing health conditions, preferring to put money into a separate 'emergency fund', or poor perceptions of the reputation of pet insurance companies.



C25, D26. Which of the following items have you claimed against your pet insurance in the last 12 months?

Base: Owners who have claimed insurance items for cats (n=103), Owners who have claimed insurance items for dogs (n=201)

One in two dog owners made an insurance claim in the last 12 months, while the same was true for two in three cat owners. For both pet types, the most claimed items were general consultations, surgery and general illness - though a relatively high proportion of cat owners in this year's survey also cited after-hours emergency visits.

Information sources

The information preferences of pet owners remain consistent with previous surveys: vets still lead as the most popular information source (51% of pet owners), followed by online searches (39%), pet shops (23%), and word-of-mouth advice from family, friends and neighbours (22%).

However, despite remaining the second most popular go-to information source, general online searches appear less popular than in 2019. Instead, owners are increasingly turning to information from animal shelters, TV shows, breeders and books - particularly those in the 'Appeal & Reassurance' segment.

In contrast, the 'Care & Quality' and 'Simplicity & Reassurance' segments are especially likely to trust vets for information - although the 'Care & Quality' cohort is also more likely than many others to turn to social media groups and forums for advice.

Less experienced owners are likelier to turn to books (9% vs 5%). Meanwhile, experienced owners are likelier to call on vets (58% vs 42%) - but also likelier to rely on their own experience and judgement (9% vs 5%).

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

↑ Significantly higher/
↓ lower compared to
2019

F14. Which of the following sources of information do you mainly use for pet related issues? (n=1,724)



6.

Policy reform



This report confirms that the significant growth in companion animal ownership recorded through 2020 and 2021 has stabilised at nearly 29 million across 6.9 million households.

This is significantly higher than before the pandemic. As Australia emerges from two years of economic disruption, rising living costs, inflation and housing costs now make considered and thoughtful companion animal policies a necessity for all Commonwealth, state, territory, and local governments.

Current and potential pet owners face numerous, significant challenges when seeking to obtain or keep a pet. These challenges include meeting their duties as responsible pet owners, accessing and keeping suitable accommodation, securing healthy animals from reputable breeders or shelters, and complying with myriad registration, containment and public space access rules.

Consistency across all jurisdictions and levels of government is now necessary to maximise benefits to pet owners while addressing community concerns from irresponsible breeding and ownership practices. While many jurisdictions have regulatory frameworks specific to pet ownership responsibilities, these often vary in scope and detail. Complexity, cost and confusion can discourage prospective owners from adding an appropriate pet to their household.

Reform in three key areas will help address many of the issues that pet owners face, and help maximise the physical, mental and community benefits arising from responsible pet ownership. Governments and stakeholders should consider:

1. Develop a consistent policy framework for companion animal ownership

Currently, companion animal policy is addressed through a variety of portfolios, agencies and governments. Depending on the issue, policy responsibility could fall to departments of agriculture or primary industry, environment, consumer affairs, health or planning and infrastructure. Inconsistent approaches to companion animal policies results in undesirable health and welfare outcomes for breeding, responsible ownership and places higher than necessary barriers to families seeking to add a pet to their household.

An effective and consistent policy framework is required to address companion animal policies through a collaborative approach that engages governments, industries and other stakeholders. Such a framework should produce better outcomes for pet owners, better pet welfare outcomes, and improve community acceptance of companion animals as a vital part of a healthy and vibrant community.

2. Greater support for pet owners that are socially and financially at risk

Consistent with previous reports, Pet Ownership in Australia 2022 confirms that owners have an overwhelmingly positive experience from pet ownership. However, for some pet owners, the ownership experience can be a source of stress. This is often associated with financial and caring responsibilities and can be associated with another personal shock, such as losing a job or a personal health emergency.

Some jurisdictions are trialling targeted support for animal welfare organisations that provide care for animals where owners are experiencing personal crises.

This support, such as that provided by the Victorian Government²³ provide an option for vulnerable pet owners to access services that are essential to protect the health and welfare of their pet.

An assessment of the merits of pet owner support programs, and the associated societal costs and benefits could identify additional opportunities for broader development and application of similar programs Australia-wide.

3. Address companion animal housing controls

Ensuring prospective owners can responsibly accommodate pets within their premises remains a key issue in maximising the benefits of pets. While many jurisdictions have passed legislation to remove some barriers, restrictive tenancy terms and strata rules often prevent some prospective owners from acquiring a desired pet that suits their living arrangements. Tight rental markets can exacerbate these problems, as lessors sometimes view pet ownership as a rental risk.

Better understanding the many benefits of responsible pet ownership may work to ameliorate some of these challenges. Indeed, some research suggests that being pet friendly can increase property value by 10%²⁴ and rental income by 30%²⁵.

In some Australian jurisdictions, body corporate rules may still sometimes preclude pet ownership without any consideration of the appropriateness of some pets to higher density living. More flexible approaches that replace restrictive rules and facilitate responsible and appropriate pet ownership are encouraged.

²³ www.premier.vic.gov.au/more-support-vulnerable-pet-owners

²⁴ www.realestate.com.au/news/petfriendly-adds-value-to-homes-for-buyers-and-sellers

²⁵ www.domain.com.au/advice/landlords-who-allow-pets-could-boost-their-rental-return-by-up-to-30-per-cent-833532



Australian Polling Council methodology disclosure statement

This research was conducted by SEC Newgate Research on behalf of Animal Medicines Australia between 6-26 July 2022.

The target population for the research was Australian adults aged 18 or older.

The research comprised an online survey with a total sample size of n=2,453. For additional details, please refer to the Technical Notes on page 3.

The research was undertaken in compliance with the Australian Polling Council Code of Conduct, which can be viewed here: www.australianpollingcouncil.com/code-of-conduct.

The Long Methodology Disclosure Statement for this research can be viewed here: www.newgatecomms.com.au/disclosure-statements



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