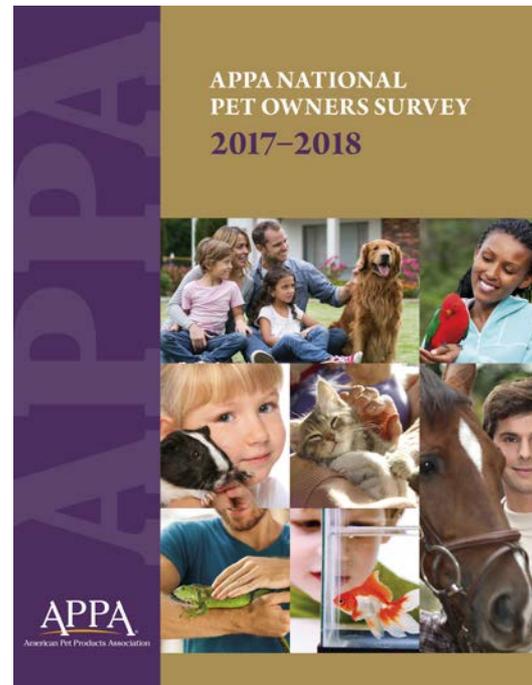


The 2017-2018 APPA National Pet Owners Survey Debut



Trusted Data for Smart Business Decisions.

Presented by: Julie Springer

2017-2018 APPA National Pet Owners Survey
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About The American Pet Products Association

- **The American Pet Products Association (APPA) is the foremost not-for-profit trade association serving the interests of the pet products industry in the U.S. and internationally.**
- **APPA was founded in 1958 with 35 member firms. Today APPA's membership currently includes over 1,000 pet product manufacturers, importers, manufacturers' representatives and livestock suppliers representing both large corporations and growing enterprises worldwide.**
- **APPA was established to promote, develop and advance responsible pet ownership and the pet products industry. To this end, APPA supports industry-related market research; monitors and responds to industry legislation and regulation; and sponsors educational seminars, networking and PR opportunities, giving members the tools they need to make important business decisions.**
- **APPA also works closely with other major organizations dedicated to similar goals to accomplish these and other important objectives.**
- **Each year, APPA hosts Global Pet Expo, the largest annual pet products trade show in the world. Global Pet Expo is the premier event in the pet products industry and enables APPA members to showcase their latest pet product lines. This year's show is *sold out!***

Background and Objective

- **In 1988, APPA began gathering quantified data from pet owners about pet ownership, pet care practices, purchasing behavior of pet-related products and sources of pet-related goods and services. These studies are conducted every other year. The current Survey was conducted in 2016 and is the fifteenth in the series.**
- **APPA's objective is to monitor consumer habits on an on-going basis to identify short and long-term trends, as well as new opportunities in pet ownership and pet product and service consumption.**
- **The National Pet Owners Survey is over 600 pages of detailed data. It begins with an Executive Summary and continues with a section for each species researched – dog, cat, freshwater and saltwater fish, bird, small animal, reptile and horse. The final section in the report is the Lifestyle & Media Survey, which explores the personal habits and attitudes of pet owners, as well as their media habits.**

Methodology

- **The 2017-2018 National Pet Owners Survey was conducted by Ipsos, Inc. Invitations to the current Survey were distributed online to a nationally representative sample from the Ipsos Online Panel. Prior to 2012, the Survey was conducted via their mail panel.**
- **The Survey was divided into two parts – a screener and detailed pet owner module (questionnaire). 22,202 respondents completed the screener, of which 12,581 were current pet owners.**
- **Following the screener, there were eight different modules, each corresponding to a different type of pet – dog, cat, freshwater fish, saltwater fish, bird, small animal, reptile and horse. Upon completing the screener, pet owners selected for *one* of the eight follow-up modules were then directed to complete the appropriate module based on the type of pet they owned.**
- **A total of 2,559 completed pet owner surveys are included in the tabulations.**
- **For the generational analysis, the following definitions for each generation apply. ‘Gen Y’ (1994-1980) includes respondents aged 18-36; ‘Gen X’ (1979-1965) respondents are 37-51 years old; ‘Baby Boomers’ (1964-1946) are between 52-70 and ‘Builders’ (1945-1920) are 71+ years old.**

Sample and Margin of Error

- The online sample was balanced by gender, age, household size, income and region. A quota system was used to ensure proper representation of sample groups.
- The table below shows the number of completed surveys and the margin of error for each species.
- The margin of error represents the percentage point difference were every pet owner in the U.S. to be interviewed.

<u>Pet Type</u>	<u>Completed Surveys</u>	<u>Margin of Error</u>
Dog	505	+/- 4.4%
Cat	451	+/- 4.6%
Freshwater Fish	300	+/- 5.7%
Saltwater Fish	151	+/- 8.0%
Bird	301	+/- 5.7%
Small Animal	300	+/- 5.7%
Reptile	301	+/- 5.7%
Horse	250	+/- 6.2%

Get Maximum Benefits From The National Pet Owners Survey!

- **There are many benefits of The National Pet Owners Survey --- it is the complete knowledge center for information about the habits, attitudes and buying practices of pet owners in the U.S.**
- **FIRST AND FOREMOST.....Read the Table of Contents! It tells you in precise detail the questions that are included in the report.**
- **The information in this presentation, as well as that in the Executive Summary, is an overview and does not include all of the questions for each species or every response option.**
- **By reading each species section the reader will obtain a more in-depth, detailed analysis of the questions asked in the Survey.**

What's New in the Pet Owners Survey?

- **Every Survey year, the questionnaires undergo a revision process to ensure we include new trends in pet care, as well as new items in the pet market.**
- **Some examples of new and/or revised questions included in the 2017-2018 Pet Owners Survey are:**
 - **Limited ingredient pet food, raw pet food and freeze-dried pet food (for dogs and cats)**
 - **Grain-free and freeze-dried treats (for dogs and cats) and grass treats (for cats)**
 - **Calming products for pets**
 - **BPA-free products**
 - **Lightweight litter**
 - **How often dog owners walk their pets**
 - **Pet-monitoring systems**
 - **The amount pet owners spend on wild bird feed/seed**
 - **Importance of made in the USA products**

Pet Ownership in the U.S.

- **Currently, pet ownership stands at 68% of all U.S. households.**
- **With the U.S. Census reporting 124.587 million households, the number of pet-owning households is 84.6 million.**
- **Pet Ownership by Species (as a Percentage of the U.S. Population):**
 - **Dog: 48%**
 - **Cat: 38%**
 - **Freshwater fish: 10%**
 - **Bird: 6%**
 - **Small animal: 5%**
 - **Reptile: 4%**
 - **Horse: 2%**
 - **Saltwater fish: 2%**
- **Pet ownership displays a consistent upward trend over more than two decades.**

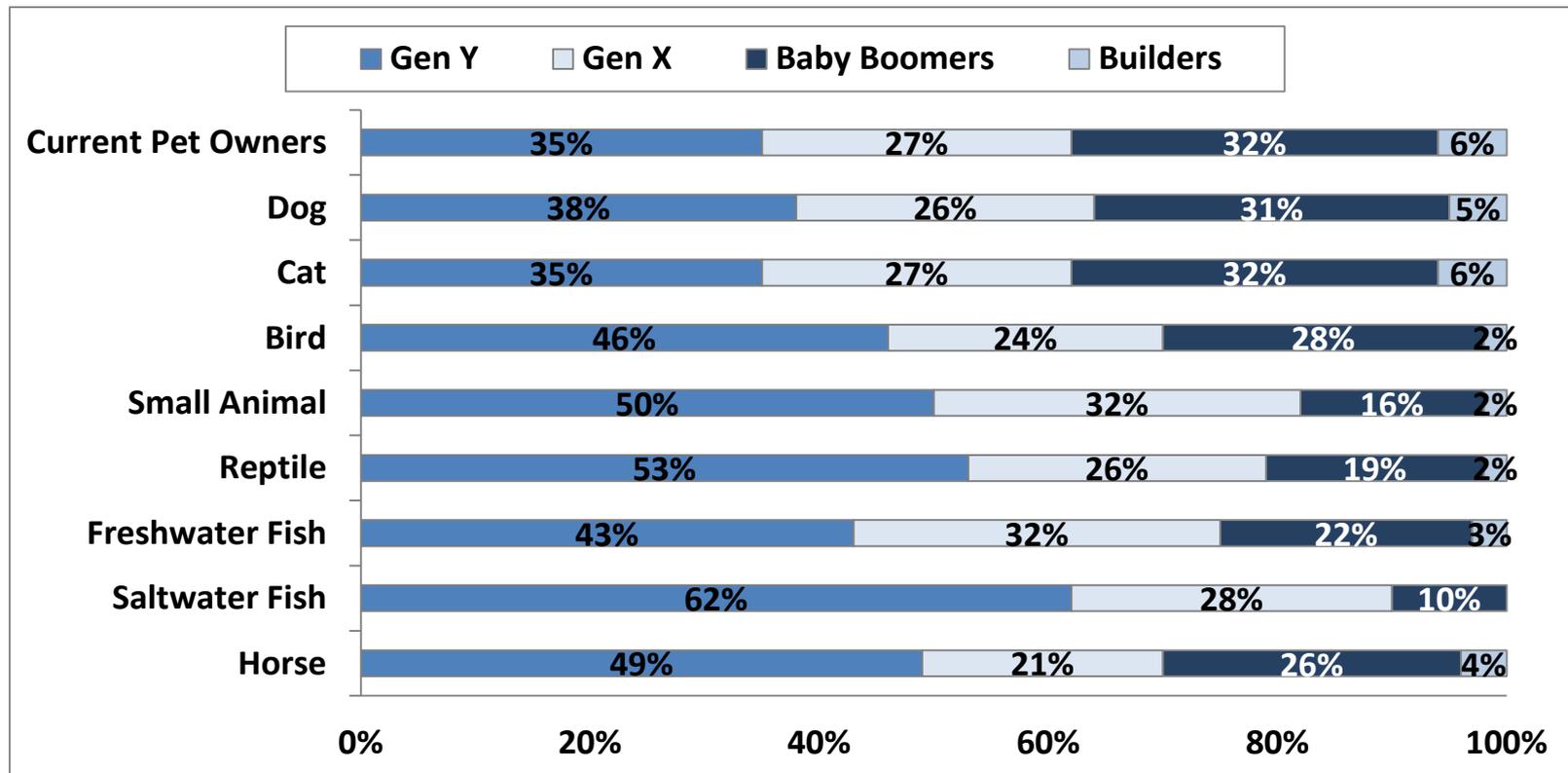
Number of Pets Owned in the U.S. (millions)

2016	Dog	Cat	FW Fish	SW Fish	Bird	Small Animal	Reptile	Horse
	#	#	#	#	#	#	#	#
Average # of pets owned per household - 2016:	1.49	2.00	11.14	7.50	2.57	2.09	2.01	2.91
# of households own pet type – 2016 (millions):	60.2	47.1	12.5	2.5	7.9	6.7	4.7	2.6
Total # of pets in the U.S. – 2016 (millions):	89.7	94.2	139.3	18.8	20.3	14.0	9.4	7.6

- The number of pets owned in the U.S. is calculated by multiplying the number of households that own the pet by the average number of pets owned per household.

Pet Ownership by Generation

- The generational makeup of pet owners is starting to shift. In 2014, Baby Boomers were the largest segment of pet owners (37%). In 2016, that percentage declined to 32%.
- Where previously Baby Boomers accounted for the largest segments of dog, cat and bird owners, the current data shows that Gen Y has supplanted Baby Boomers as the largest group of owners of these pets.



Pet Combinations Owned

- This table is based on total current pet owners. It shows combinations of any two types of pets owned but does not show those who own more than one of the same type of pet or those who own more than two types of pets.
- 46% of current pet-owning households have multiple types of pets.
- A combination of dogs and cats is still the most common (32% of current pet owners).
- 11% own dogs and fish, followed by cats and fish (9%) and dogs and birds (7%).

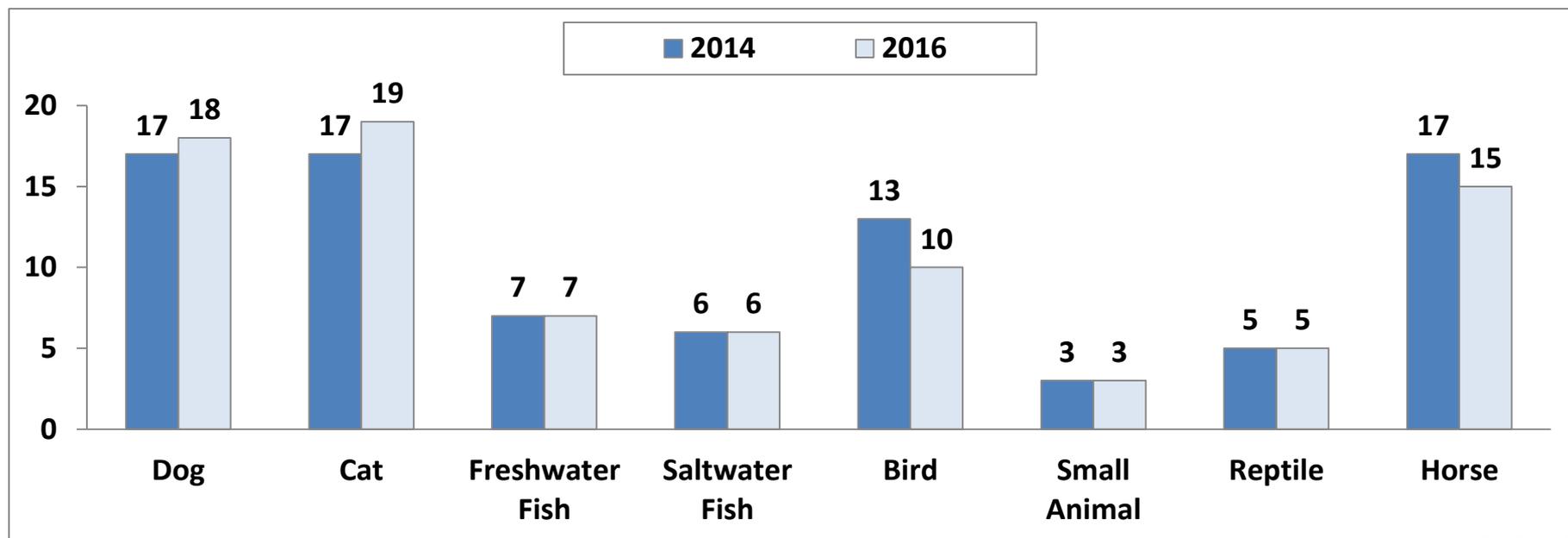
2016	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
	%	%	%	%	%	%	%
Dog	X	32	11	7	6	4	3
Cat	32	X	9	6	5	3	2
Total Fish	11	9	X	3	3	2	1
Bird	7	6	3	X	2	2	1
Small Animal	6	5	3	2	X	2	1
Reptile	4	3	2	2	2	X	1
Horse	3	2	1	1	1	1	X

Demographics of Pet Owners

- **To ensure a representative group of respondents, the sample is designed to mirror the US Census numbers for certain variables. However, when the data is examined by specific species, there are notable demographic differences.**
- **There is a higher percentage of bird owners in the Mid-Atlantic, South Atlantic and Pacific regions; a higher percentage of small animal owners in the Mid- Atlantic; a higher percentage of reptile owners in the Pacific region and a higher percentage of horse owners in the South Central regions.**
- **Horse owners live in more rural areas, while bird owners live in large urban areas and reptile owners live in urban areas with 2.5-4.9 million people.**
- **Horse owners have the highest average household incomes, followed by bird, fish, dog and small animal owners. Reptile owners have the lowest average household income.**
- **Owners of small animals, fish, birds and reptiles demonstrate a higher percentage of having young children at home. Therefore, these owners also have larger households that are defined as family households.**
- **Fish, small animal and reptile owners report the youngest average age, while cat, dog and horse owners report the oldest.**
- **While pet owners in general report a higher percentage of home ownership than the total U.S. population, horse owners indicate the highest level of home ownership of a single family house.**
- **Dog, fish and bird owners have the highest levels of being married, while cat and reptile owners actually fall below the levels reported for the general population.**

Number of Years as a Pet Owner

- At first glance, the average number of years of being a pet owner is primarily stable within each species owned. However, a decline of even one or two years can be indicative of new owners in the category reducing the overall average number of years as an owner.
- Dog and cat owners have seen an increase over the previous Survey.
- Freshwater and saltwater fish remain stable, as have small animals and reptiles.
- The number of years respondents have been a bird owner notes a decline, as does the number of years of horse ownership. This could mean new owners in both categories.



Common Sources Where Pets Are Obtained

2016	Dog	Cat	Total Fish	Bird	Small Animal	Reptile
Base: Total Survey Pet Owners	(505)	(451)	(451)	(301)	(300)	(301)
	%	%	%	%	%	%
Adopted at a pet chain/superstore	6	7	NA	23	30	21
Adopted at a pet store-independent	4	3	NA	13	15	11
Animal shelter/humane society	22	28	NA	8	11	3
Breeder/hatchery/animal farm	25	4	3	10	5	6
Fair/carnival/bazaar	NA	NA	9	NA	1	1
Feed store/home improvement/hardware/garden store	NA	NA	NA	4	3	NA
Friend/relative	25	26	11	20	17	22
Gift	2	2	9	8	6	9
Private party	10	6	3	3	12	5
Purchased at a pet chain/superstore	1	1	36	10	16	15
Purchased at a pet store-independent	3	*	13	5	10	10
Bred at home/from own pet	1	6	11	3	2	3
Rescue group	12	9	NA	NA	NA	NA
Specialty store (fish or bird store)	NA	NA	38	21	NA	NA
Stray/caught or found outside/flew into yard	4	32	6	4	1	15
Swap meet	NA	NA	1	1	1	1
Teacher/school	NA	NA	*	NA	1	3
Veterinarian	1	3	NA	2	NA	NA
Other	4	3	2	4	5	6

How Owners Learn of Pet's Availability

- Word of mouth is the most effective tool to communicate a pet's availability.
- The Internet is a leading resource for dogs, fish, birds and small animals. The percentage of pet owners who learned their fish, bird or small animal was available via the Internet has increased from the previous Survey.
- Close to one-half of cat, fish and reptile owners learned about their pet from an "other" undefined source.

2016	Dog	Cat	Total Fish	Bird	Small Animal	Reptile
Base: Total Survey Pet Owners	(505)	(451)	(451)	(301)	(300)	(301)
	%	%	%	%	%	%
Internet/online	33	19	32	31	35	21
Newspaper/magazine/publication	10	5	17	11	5	2
Sign/bulletin board	3	2	10	8	6	1
Word of mouth	46	45	39	46	42	47
Other	25	49	47	33	32	44

Pet-Related Expenses

- **Dog and cat owners report spending the most on the same categories – boarding/kennel, food and all types of veterinarian visits (sick, routine, surgical and emergency). While the amounts spent are comparable for food, for the other expenses, cat owners tend to spend less than dog owners.**
- **Freshwater fish owners spend more on ponds, tanks, stands and aquariums, while saltwater fish owners' top expenses are tanks, filtration, water conditioners and other supplies.**
- **Bird owners spend the most on treats, followed by food, sick veterinarian visits and cages.**
- **Horse expenditures are clearly in a category of their own, with the top items being boarding and food. Other expenses topping \$1,000 per year are stable help, trainers and saddles.**
- **Please note that these expenses are based on consumer recollection and not syndicated sales data.**
- **The chart on the next page compares some common expenses but does not include every item related to pet ownership.**

Pet-Related Expenses

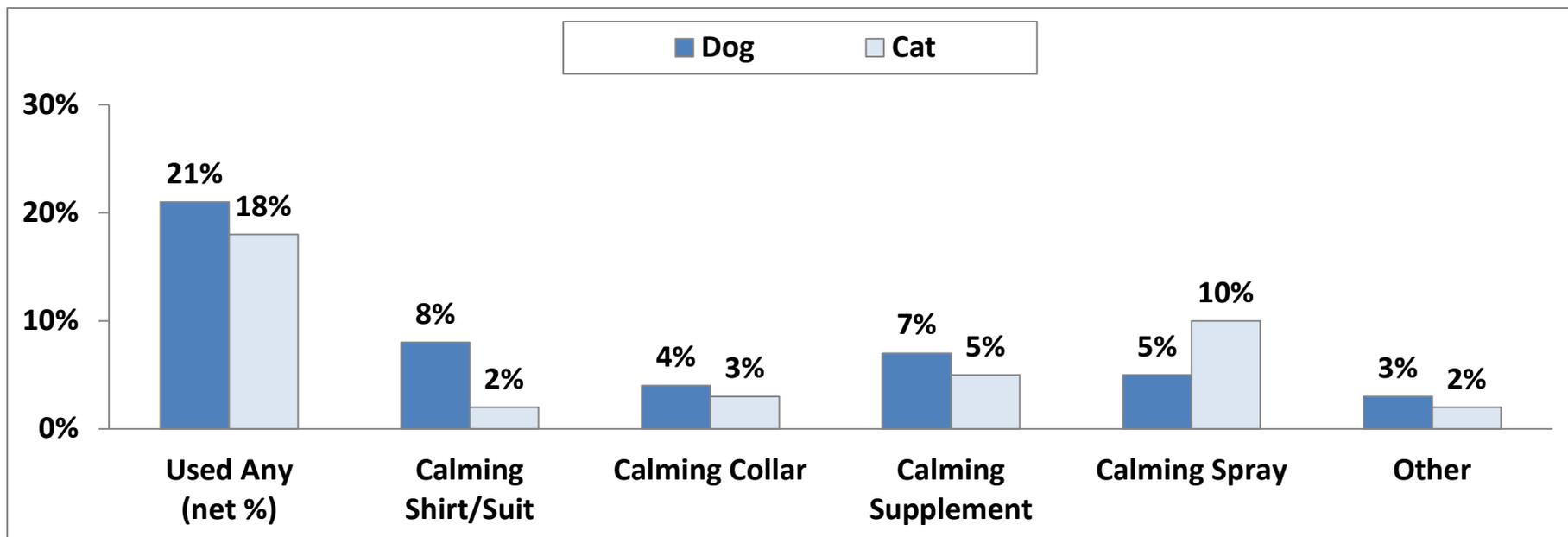
2016	Dog	Cat	FW Fish	SW Fish	Bird	Horse
Base: Total Survey Pet Owners	(505)	(451)	(300)	(151)	(301)	(250)
	\$	\$	\$	\$	\$	\$
Beds (bowls-fish; blankets/wraps/sheets-horse)	43	29	80	86	NA	204
Boarding/kennel (ponds-fish)	322	164	376	NA	56	2,645
Books/pamphlets/videos on care/training	27	17	NA	NA	30	NA
Cages/crates (desktop aquariums-fish; stable help-horse)	62	NA	100	99	129	2,418
Carriers (tanks-fish; trainers-horse)	86	38	234	192	NA	1,131
Emergency veterinarian visits	349	154	NA	NA	107	471
Food	235	235	41	101	169	1,776
Food treats (live plants-fish)	72	56	78	75	378	261
Groomer/grooming aids (filtration-fish)	84	30	60	118	45	225
Heartworm medication (hoof care-horse)	102	65	NA	NA	NA	540
Leashes (lighting-fish; training aids-horse)	23	28	73	83	NA	337
Medicated flea & tick control products (medicated shampoo-bird; insect control-horse)	85	77	NA	NA	49	102
Non-medicated collars/decorative collars (stands-fish; bridle/bridle accessories-horse)	21	18	190	74	NA	288
Other expenses (saddles-horse)	104	91	NA	NA	63	1,168
Other medications	132	82	92	66	89	366
Other supplies (farrier-horse)	71	71	75	117	51	612
Routine veterinarian visits (test kits-fish)	257	182	67	47	102	549
Shampoo/conditioner (non-medicated)	25	24	NA	NA	34	110
Sick veterinarian visits	204	244	NA	NA	138	NA
Surgical veterinarian visits	474	245	NA	NA	45	NA
Toys (decorations-fish) (rider gear/boots/helmets-horse)	47	30	50	80	35	388
Vitamins/supplements (chemicals/water conditioners-fish)	58	46	43	132	40	NA

Caring for a Pet's Health

2016	Dog	Cat	Bird
Base: Total Survey Pet Owners	(505)	(451)	(301)
	#	#	#
Average number of veterinarian visits in the past 12 months:	2.7	2.2	3.1
Services received at the veterinarian's office:	%	%	%
Rabies vaccinations	48	31	NA
Routine physical	68	49	45
Other vaccine(s)	58	42	23
Flea/tick protection/prevention/cure products	39	19	NA
For specific illness/only when sick	28	20	11
Boarding	4	2	10
Food	10	7	39
Food treats	6	3	28
Dental care products/services	16	8	NA
Emergency visit	11	6	15
Grooming	14	5	27
Grooming supplies	3	2	14
Surgery	10	8	8
Other	4	2	5
	%	%	%
Pets spayed/neutered:	85	93	NA
Pets groomed (any type, professional or at home):	84	9	35
Pets given homeopathic remedies:	8	6	NA
Pets given flavored oral medication:	29	18	NA
Pets ever put in hospice care at a veterinarian's:	5	6	NA

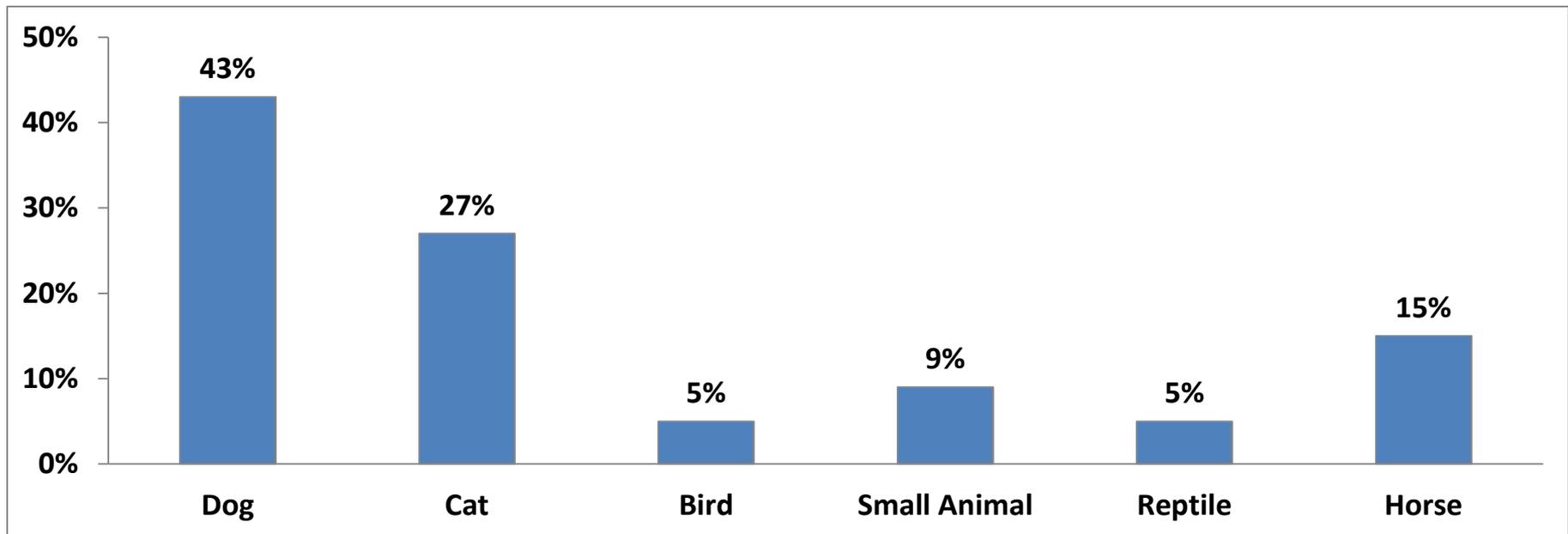
Calming Products

- A new topic in the current Survey asked dog and cat owners about calming products they have used for their pet.
- Slightly more dog owners have used such products than cat owners.
- Calming shirts or suits and supplements are the most popular among dog owners, while calming spray is more popular with cat owners.



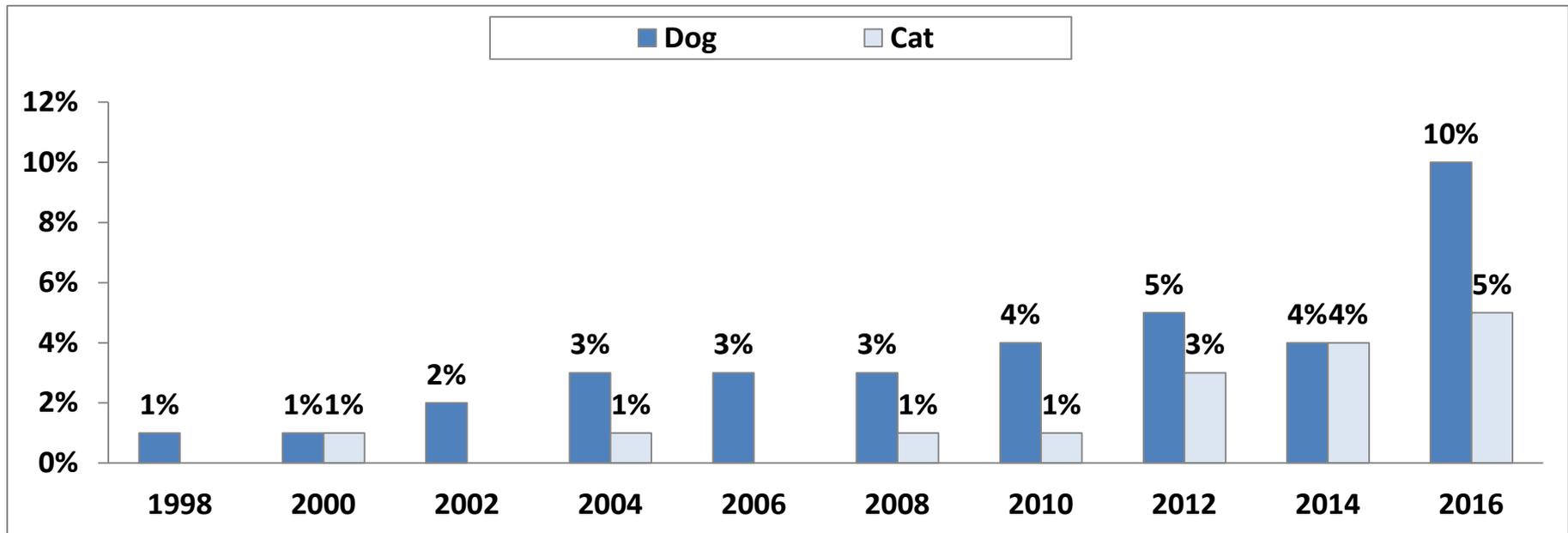
Electronic Tracking Devices

- Almost half of dog owners have an electronic tracking device for their pet. This is an increase from the last Survey's level of 36%.
- More than one-quarter of cat owners have such a device.
- The other four pet categories have all noted increases from the past Survey.



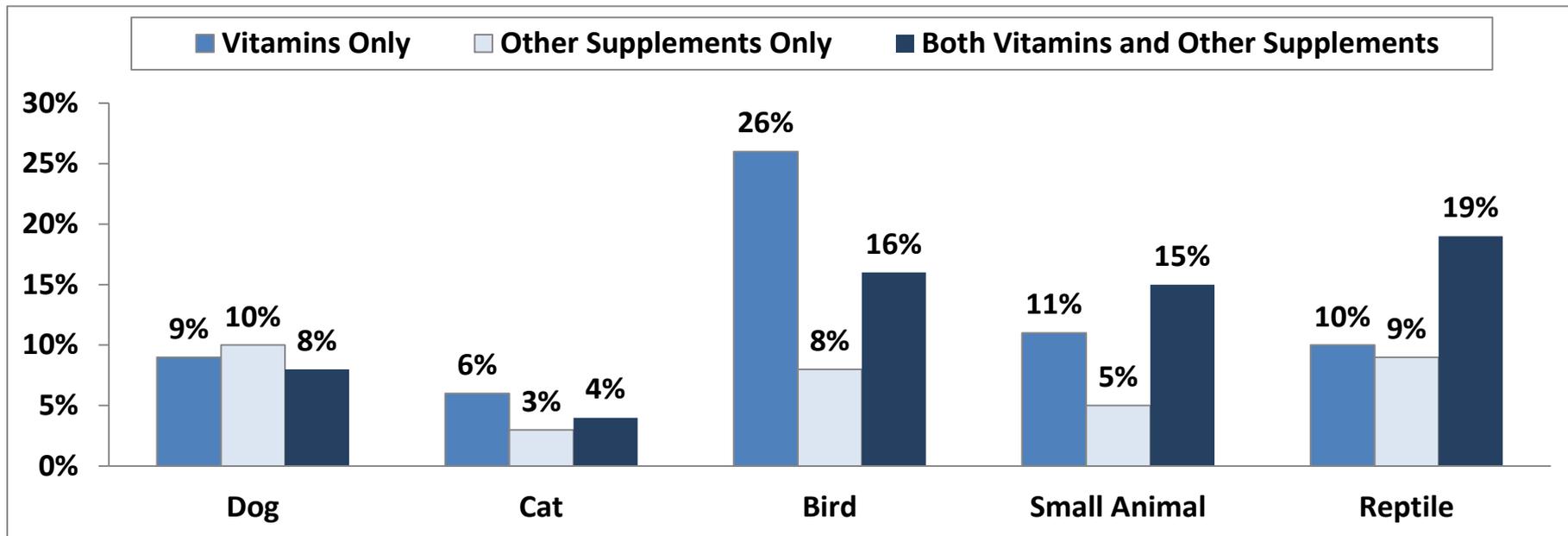
Health Insurance for Dogs and Cats

- 10% of dog owners and 5% of cat owners have health insurance for their pets.
- Based on the total number of dogs and cat in the US that equates to nearly 9 million dogs and over 4.5 million cats with insurance.
- Gen Y dog and cat owners are more likely than older pet owners to have insurance policies for their pets.
- Most policies cost between \$250-\$499 per year.



Pets Given Vitamins and/or Other Supplements

- The current Survey shows across the board increases in the use of vitamins and other supplements for pets.
- 26% of bird owners give their pet vitamins only.
- 15%-20% of bird, small animal and reptile owners give their pets both vitamins and other supplements.
- Dog owners tend to use vitamins and supplements equally, while cat owners lean more toward vitamins only.

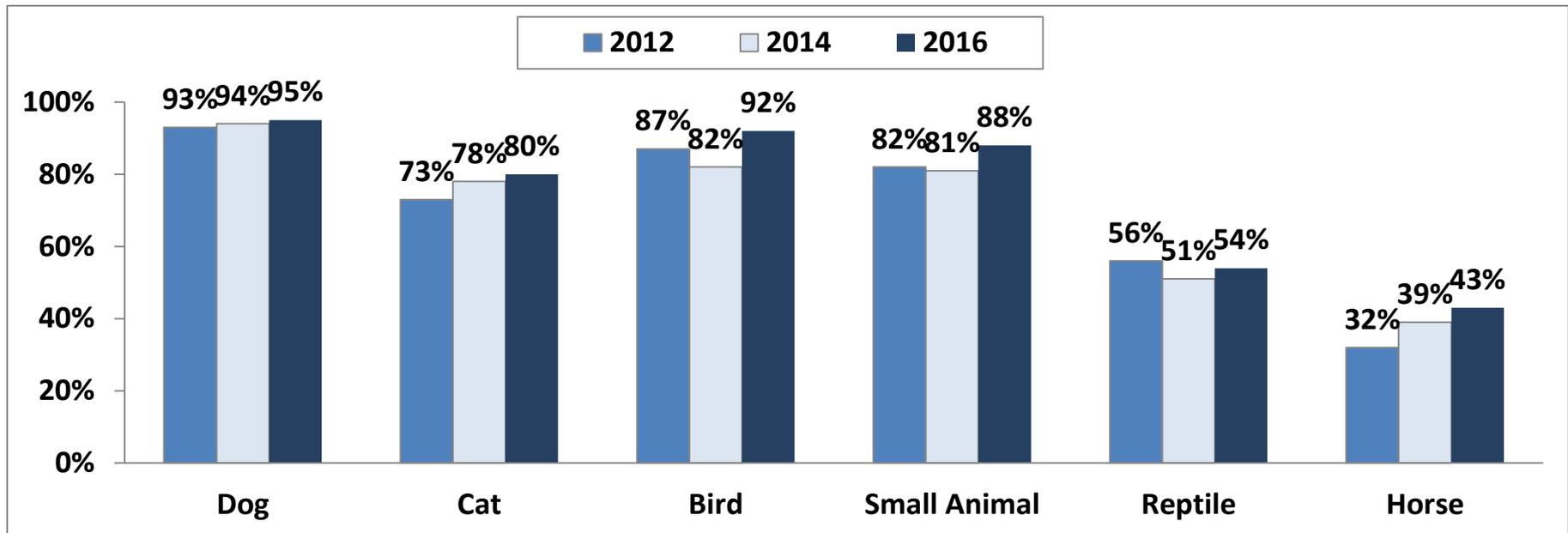


Food Purchased for Dogs and Cats

	Dog			Cat		
	2012	2014	2016	2012	2014	2016
Base: Total Survey Pet Owners	(527)	(521)	(505)	(461)	(457)	(451)
	%	%	%	%	%	%
Food with added vitamins or minerals (such as calcium or vitamin E)	19	16	12	17	18	18
Food with added glucosamine and/or chondroitin	8	5	6	2	4	3
Food with added herbs and/or botanicals	3	3	3	5	6	5
Food with added prebiotics or probiotics	5	5	6	5	7	4
Organic food (food made in accordance with a certification process which limits the amount of chemicals used in production)	7	7	8	4	6	7
Natural food (food with no synthetic material, but no certification process)	18	19	22	14	19	18
Gourmet food (food considered upscale or fancy)	8	6	5	15	19	17
Premium food (food with more nutrients, less preservatives & metabolized more efficiently than lower grade food)	45	47	41	40	42	39
Grain-free/gluten-free food	7	11	19	4	9	15
Raw food	NA	NA	3	NA	NA	4
Specialty food (e.g., kosher, vegetarian, frozen, fresh, etc.)	3	5	5	4	7	2
Limited ingredient food (for pets with food sensitivities)	NA	NA	12	NA	NA	10
Other pet food	20	16	16	31	23	23
Human food (either cooked or raw)	19	17	17	10	9	9
Bottled water for pets (plain/flavored/nutrient enhanced)	3	4	4	2	3	4

Pets Given Treats

- The percentage of pet owners giving treats to their pets has increased from the previous Survey across all pet types.
- New to this year's Survey are grain-free treats and freeze-dried treats (for dogs and cats) and grass treats for cats.
- More specific treat information can be found in the individual species sections of the Survey.

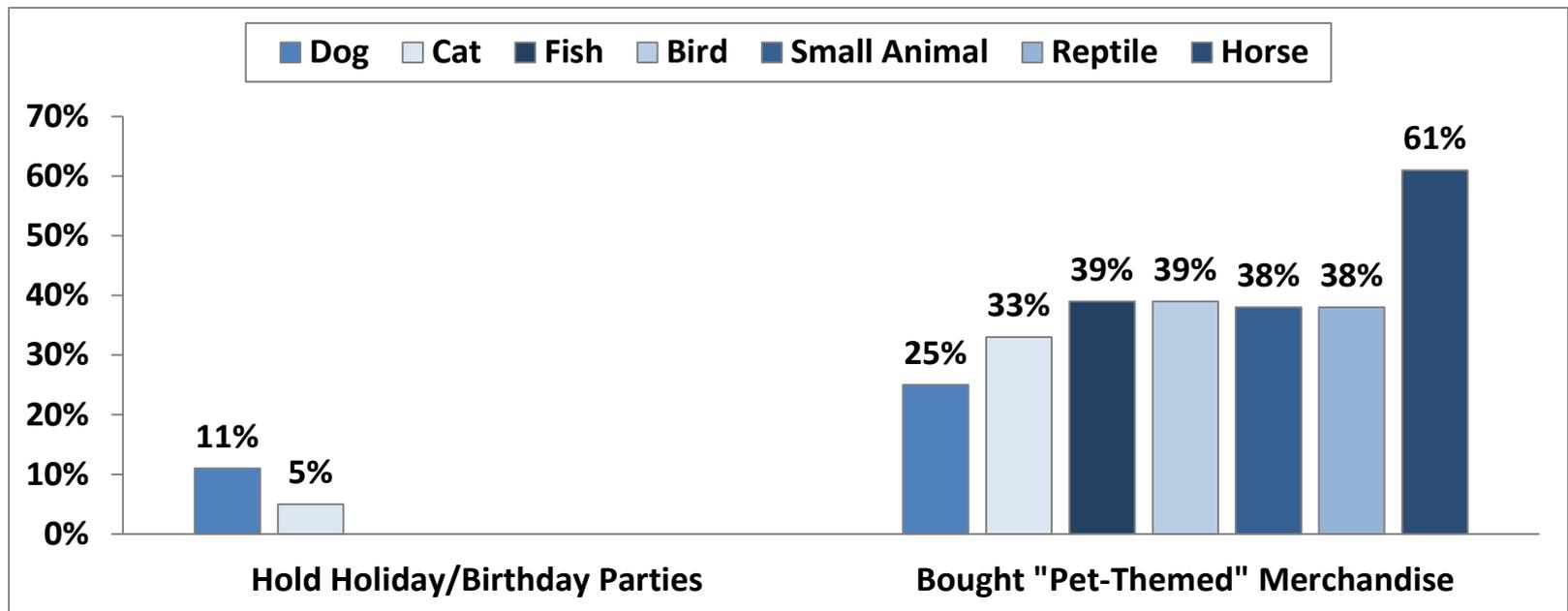


Gifts for Pets

2016	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Survey Pet Owners	(505)	(451)	(451)	(301)	(300)	(301)	(250)
	%	%	%	%	%	%	%
Any Gift Purchased (net %):	<u>78</u>	<u>67</u>	<u>46</u>	<u>69</u>	<u>74</u>	<u>46</u>	<u>62</u>
Anytime/no special occasion	44	42	27	35	44	32	38
Birthday	28	17	14	19	24	9	19
Chanukah	2	1	7	6	4	1	4
Christmas	48	38	13	26	33	14	25
Easter	5	2	9	8	8	1	8
Halloween	7	4	6	9	6	3	5
Valentine's Day	6	5	7	8	7	1	6
Other holiday	2	2	3	4	4	*	3
When pet is good	12	6	-	12	8	3	10
When we go on vacation	6	3	5	6	7	4	6
Other occasions	7	5	2	6	8	3	7
Do not purchase gifts for pet	22	33	54	31	26	54	38
% of Pets Who Share Gifts	70%	87%	NA	NA	NA	NA	NA
Base: Purchased Gift for Pet	(396)	(304)	(205)	(209)	(223)	(138)	(154)
Average spent per gift:	\$14	\$12	\$80	\$56	\$26	\$22	\$72
# of gifts purchased per year:	5.0	4.9	3.9	4.0	4.5	3.2	6.6

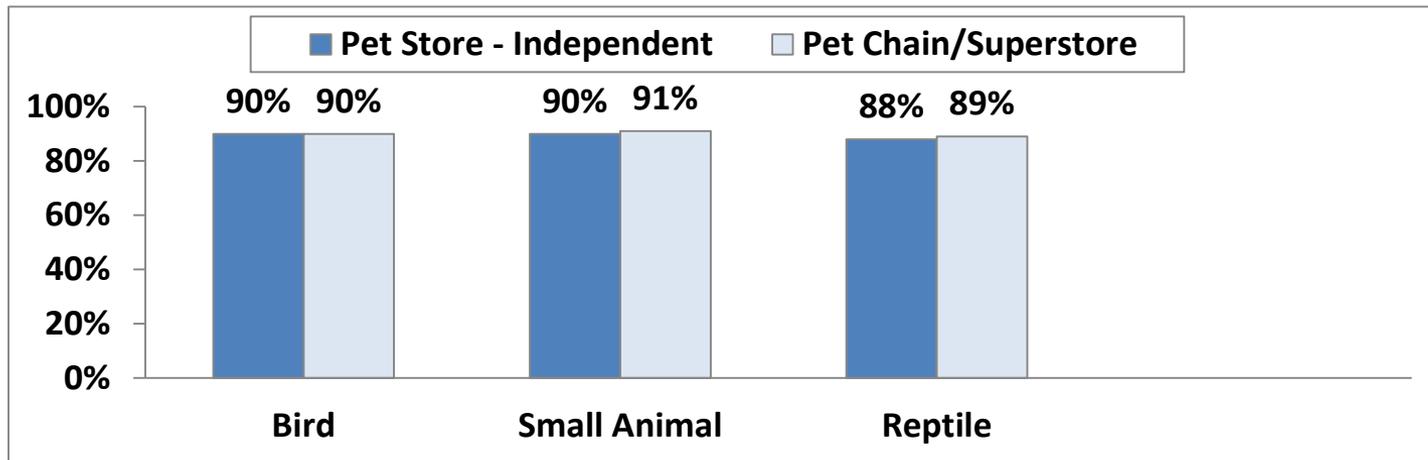
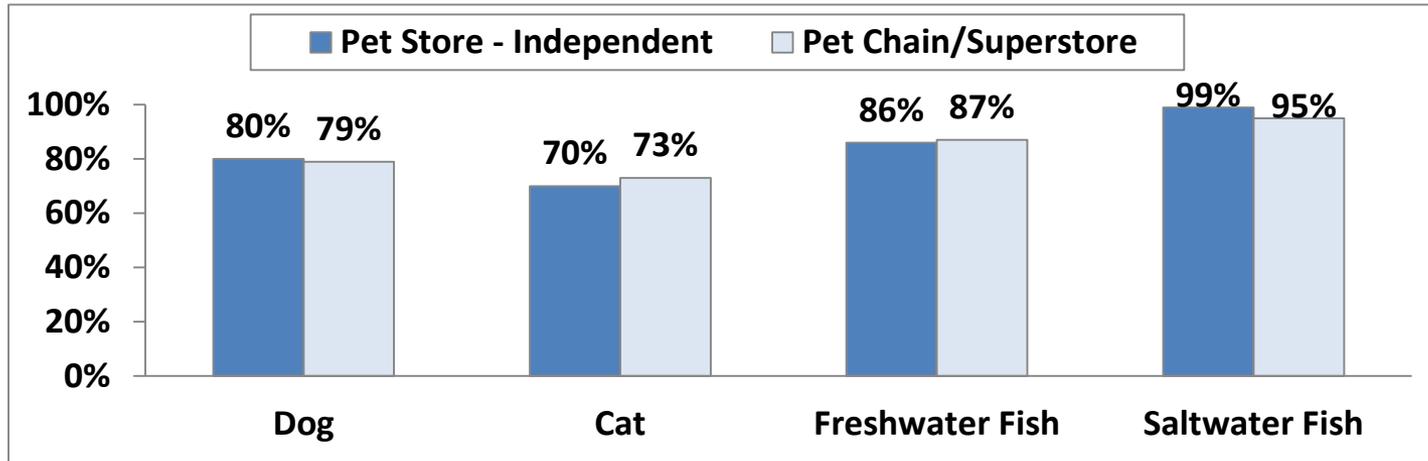
Pet Parties and Pet-Themed Merchandise

- **11% of dog owners and 5% of cat owners hold holiday or birthday parties for their pet. The percentage of dog owners has increased from 7% in 2014.**
- **Horse owners are the most likely to have purchased “pet-themed” merchandise (61%), while dog owners are the least likely (25%).**



Local/Independent Pet Stores vs. Pet Chains/Superstores

- Most pet owners indicate equal patronage of independent pet stores and pet superstores, with 70% or more visiting both within the past 12 months.
- Owners of saltwater fish, small animals and reptiles visit independent pet stores and pet superstores between 6 and 8.5 times per year. Owners of other species report between 5 and 6 visits to each.



Items Purchased Online

- The previous Survey indicated close to one-third of pet owners had purchased food, treats, medications and supplies online. The current Survey shows closer to one-half are doing so.
- The average number of purchases of each item per year has remained consistent with the previous Survey.

2016	Current Pet Owners	Dog	Cat	FW Fish	SW Fish	Bird	Small Animal	Reptile	Horse
Base: Total Pet Owners	(12,581)	(8,701)	(6,773)	(1,689)	(227)	(881)	(729)	(553)	(289)
Items Purchased:	%	%	%	%	%	%	%	%	%
Food	48	50	48	51	72	75	56	53	56
Treats	45	50	44	45	72	61	55	48	58
Medication	37	44	37	39	69	51	42	41	60
Other Supplies	47	49	48	50	72	59	61	57	66

2016	Current Pet Owners	Dog	Cat	FW Fish	SW Fish	Bird	Small Animal	Reptile	Horse
Base: Total Pet Owners	(12,581)	(8,701)	(6,773)	(1,689)	(227)	(881)	(729)	(553)	(289)
Average # of Purchases:	#	#	#	#	#	#	#	#	#
Food	7.6	7.5	7.9	7.0	7.5	7.1	7.1	7.4	8.3
Treats	6.0	6.1	6.0	5.7	5.9	5.4	5.6	5.8	6.7
Medication	3.4	3.5	3.5	3.4	4.0	3.9	3.7	3.6	4.1
Other Supplies	4.5	4.4	4.9	4.7	5.2	5.1	5.2	5.1	5.9

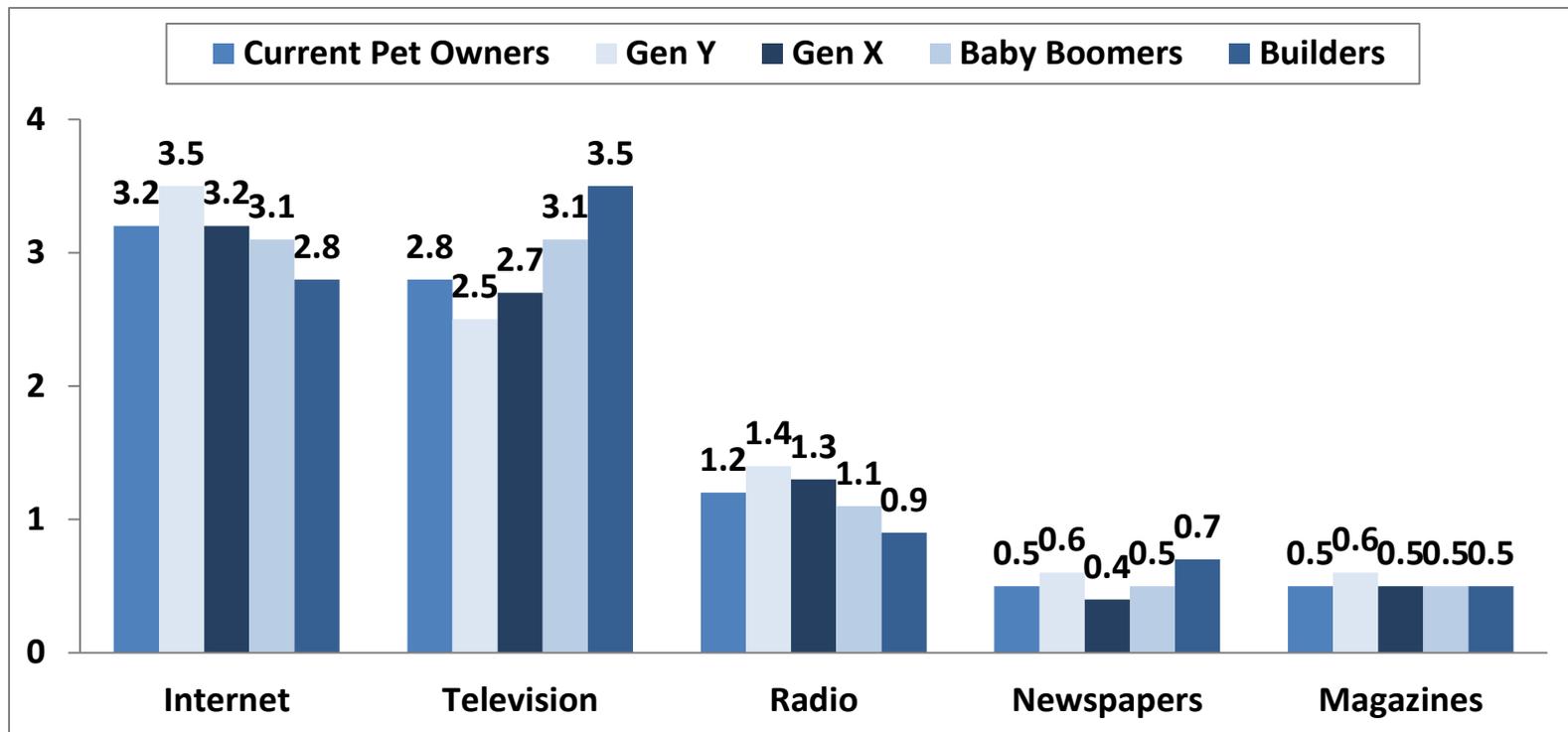
Importance of Brand Name

- Brand name is very important to 50% of saltwater fish owners.
- Brand name importance has increased among all pet owners (except dog owners).
- Across all pet types owned, significantly more Gen Y pet owners feel that brand name is very important when shopping for pet care items

2016	Dog	Cat	FW Fish	SW Fish	Bird	Small Animal	Reptile	Horse
Base: Total Survey Pet Owners	(505)	(451)	(300)	(151)	(301)	(300)	(301)	(250)
	%	%	%	%	%	%	%	%
Very important	15	16	14	50	33	22	12	24
Somewhat important	54	54	45	40	44	39	44	50
Not at all important	31	30	41	10	23	39	44	25

Media Habits

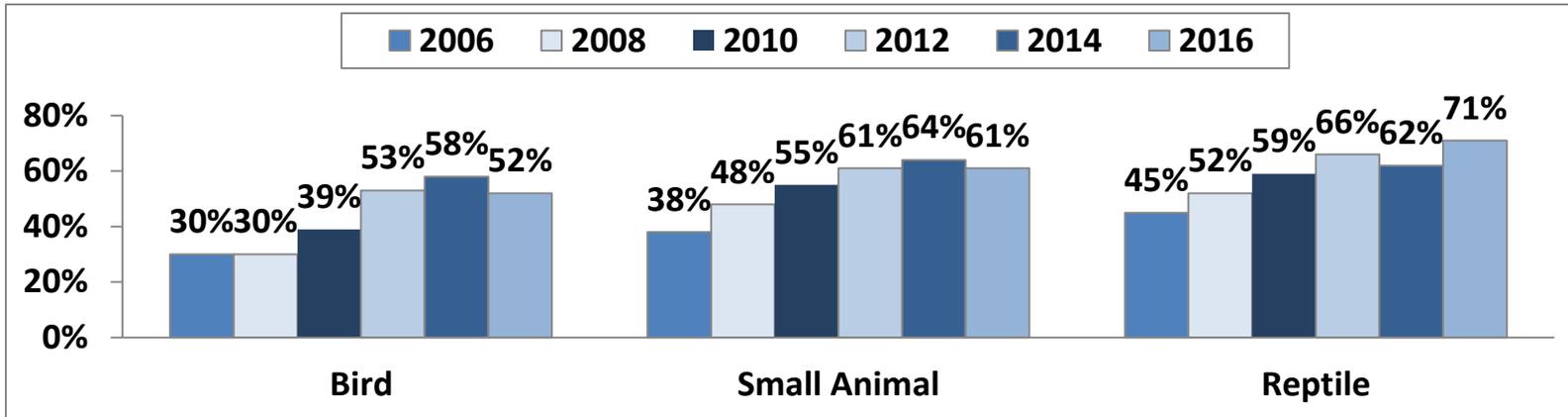
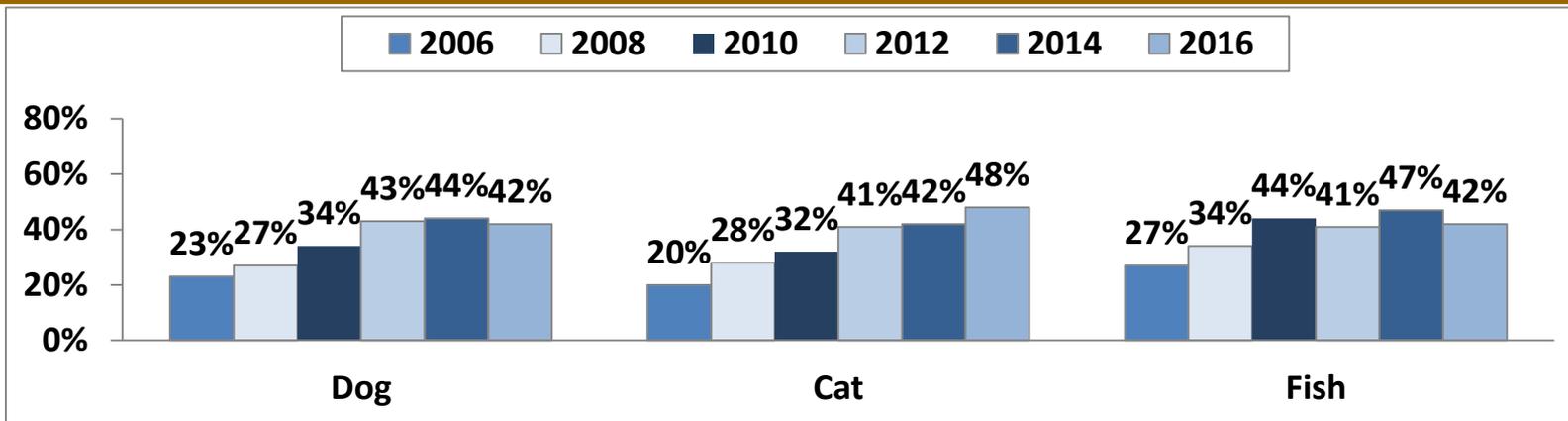
- The amount of time spent on each media outlet is fairly consistent across the different pet types owned.
- By generation, media habits exhibit differences. For example, time spent on the Internet increases as the age of the pet owner decreases. Gen Y spends 3.5 hours per day, while Builders spend 2.8 hours per day.
- Television watching patterns are the reverse of the Internet pattern, with the amount of time spent watching television greater among older pet owners.



Information Sources

2016	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Survey Pet Owners	(505)	(451)	(451)	(301)	(300)	(301)	(250)
	%	%	%	%	%	%	%
Advertising	5	4	8	6	8	2	10
Animal shelter personnel (clinicians-horse)	5	5	NA	NA	NA	NA	22
Bird store/fish store/tack store (horse)	NA	NA	37	18	NA	NA	22
Books/library/videos	9	12	12	20	19	20	31
Breeder	7	1	5	9	NA	7	15
Friends/relatives	28	35	25	20	36	27	46
Groomer (groom/barn manager-horse)	14	3	NA	NA	NA	NA	16
Internet/online	42	48	42	52	61	71	43
Kennel/breed club/societies	3	4	11	11	NA	9	23
Magazines (sports organizations-horse)	9	12	9	14	11	6	6
Other store personnel (feed store-horse)	2	3	6	6	9	8	31
Past experience	32	38	25	21	40	29	58
Pet store personnel	13	17	39	31	39	45	8
Radio	3	3	3	2	4	1	6
Television	11	11	10	13	10	4	11
Trainer/farrier (horse)	3	NA	NA	NA	NA	NA	47
Veterinarian	60	49	10	26	28	21	70
Other	8	10	6		7	2	8

Information Sources – The Internet



How a Pet Owner Becomes Aware of New Pet Products

- Browsing in a store is the number one way a pet owner becomes aware of new pet products.
- While television ads have softened, they are still the number two source of new products, followed by the Internet at number three.

2016	Current Pet Owners	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Pet Owners	(12,581)	(8,701)	(6,773)	(1,790)	(881)	(729)	(553)	(289)
	%	%	%	%	%	%	%	%
Any Internet (net)%	38	40	40	44	51	50	50	52
Internet/Web surfing	32	34	34	37	43	42	44	44
Online banner ads	8	9	9	10	15	13	12	19
Link from another site	9	11	11	13	19	17	16	54
Browse in a store	58	58	60	60	59	66	66	68
Direct mail	11	12	13	13	19	17	16	25
Friend/Relative	31	34	32	34	34	37	41	41
Pet store personnel	21	23	21	31	32	33	32	30
Print ad	23	23	25	22	24	25	24	24
Radio	5	6	6	7	11	8	9	14
Television ad	39	41	42	37	37	36	38	36
Veterinarian	25	30	25	25	32	28	26	42
Other	3	3	4	4	5	4	4	5

How a Pet Owner Learns About Pet Products on the Internet

- Those using the Internet to learn about new pet products usually do so through a pet product company website.
- The use of Facebook pages has significantly increased from the previous Survey.
- Other social media outlets (Instagram, Twitter, YouTube, etc.) have all noted increases over the previous Survey.

2016	Current Pet Owners	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Pet Owners Who Became Aware of Products via the Internet	(4,721)	(3,485)	(2,673)	(778)	(451)	(364)	(276)	(150)
	%	%	%	%	%	%	%	%
Blogs	19	21	21	23	32	33	30	37
Facebook pages	47	50	51	51	54	57	50	58
Instagram	14	17	17	19	29	25	21	27
Pet product company websites	63	63	64	67	67	69	68	69
Pinterest	22	24	23	27	24	30	34	37
Product review sites	43	44	42	46	45	48	50	56
Twitter	12	15	16	17	27	20	15	21
YouTube	25	28	28	35	45	37	33	36
Other	13	11	13	10	10	9	14	13

Benefits and Drawbacks of Owning Pets

- **Owners of all types of pets recognize the benefits of companionship/love/company/ affection, that pets are fun to have in the home, pets are like a family member and pets can relieve stress.**
- **Fish owners enjoy their pets for their appearance and as a hobby.**
- **Bird and reptile owners feel their pets are a conversation piece.**
- **Reptile, cat and small animal owners appreciate the convenience of their pets.**
- **Nearly half of all small animal and horse owners feel their pet is good for teaching children responsibility.**
- **Health benefits are noted by owners of horses, dogs and cats.**
- **Drawbacks to pet ownership are often species specific (for example, keeping water clean for fish, noise for birds or shedding for dogs and cats).**
- **In general terms, some universal drawbacks mentioned are sadness when the pet dies, cleaning up, the cost for food/care/medicine and finding care when away from home.**
- **Some pet owners feel there are no drawbacks to pet ownership. Dog and reptile owners are the most likely to say there are no drawbacks (24% and 23%, respectively).**

Benefits of Owning a Pet

2016	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Survey Pet Owners	(521)	(457)	(452)	(301)	(300)	(300)	(250)
	%	%	%	%	%	%	%
Appearance	NA	NA	44	NA	NA	NA	NA
Breed for money (breeding-horse)	NA	NA	5	5	5	2	15
Brings my family closer together	38	35	18	29	35	21	38
Companionship, love, company, affection	81	83	NA	46	62	29	62
Convenience, easy to maintain	14	37	29	31	36	46	NA
Conversation piece (entertainment-horse)	NA	NA	32	40	32	49	46
Educational (dog shows; for profit-horse)	1	NA	18	21	24	31	13
Fun to watch, have in household	73	76	64	67	76	73	62
Good for children, teach responsibility	25	22	33	34	52	36	46
Good for my health or my family's health	53	46	20	28	37	20	59
Provides therapy/assistance to handicapped/elderly	12	8	NA	NA	NA	NA	NA
Hobby (manual labor-horse)	NA	NA	34	22	26	32	30
Keep undesirable animals/rodents away	14	33	NA	NA	NA	3	NA
Like a child/family member	59	56	NA	45	44	28	46
Quiet (trail/pleasure riding-horse)	NA	NA	36	NA	NA	53	62
Relaxation/relieves stress	67	68	51	48	55	40	71
Security	49	NA	NA	NA	NA	NA	10
Walking/jogging/exercise	48	NA	NA	NA	NA	NA	58

Drawbacks of Owning a Pet

2016	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Survey Pet Owners	(521)	(457)	(452)	(301)	(300)	(300)	(250)
	%	%	%	%	%	%	%
Algae	NA	NA	28	NA	NA	NA	NA
Bad around other pets	5	4	NA	7	6	4	14
Bad around small children/biting (safety issues-horse)	3	2	NA	8	5	2	19
Cleaning up (time consuming-horse)	26	28	38	43	45	36	29
Cost for food, care, medicine (maintenance-horse)	31	31	16	19	25	16	46
Damage to furniture, carpets, floors	18	37	NA	12	17	2	NA
Damage to outdoor property	5	2	NA	NA	12	1	NA
Escape from cage	NA	NA	NA	11	11	9	NA
Family member allergy	4	7	NA	6	10	1	9
Finding care when away from home	28	23	20	24	25	23	40
Fleas and ticks	14	18	NA	NA	NA	NA	NA
Getting children to accept responsibility	3	2	NA	9	16	10	8
Health problems (dog, cat, horse)/sanitary conditions (bird, small animal, reptile)/keep water clean (fish)	14	14	40	12	8	7	18
Noise	26	14	NA	25	7	NA	4
Odor	12	29	NA	15	36	23	8
Sadness when they die/die too easily	48	54	23	38	53	35	59
Shedding	32	40	NA	NA	NA	NA	NA
Too great a responsibility (daily responsibility-horse)	3	3	8	9	7	3	30
Veterinarian not knowledgeable	NA	NA	7	10	7	9	46
No drawbacks to ownership	24	19	16	18	15	23	10

Specific Health Benefits From Pet Ownership

- 80% of total pet owners derive happiness and emotional support from their pets.
- Stress relief and lower anxiety or depression are reported by 66% and 55% of pet owners, respectively.
- Physical benefits such as lower blood pressure and more exercise are noted by one-third of pet owners.

2016	Current Pet Owners	Dog	Cat	FW Fish	SW Fish	Bird	Small Animal	Reptile	Horse
Base: Total Pet Owners	(12,581)	(8,701)	(6,773)	(1,790)	(1,689)	(227)	(881)	(729)	(553)
	%	%	%	%	%	%	%	%	%
Better mental acuity	32	35	32	34	33	45	40	40	40
Happiness/Emotional support	80	81	81	76	76	66	76	80	80
Exercise more	33	44	27	34	34	45	41	37	37
Improved cardiovascular health	18	22	17	18	18	30	25	22	22
Improved immunity	14	16	15	16	16	32	22	19	21
Less anxiety/depression	55	57	57	55	56	52	55	62	63
Lower blood pressure	34	35	37	33	34	37	38	38	40
Stress relief	66	67	68	67	67	65	64	72	70
Other	4	4	4	4	4	5	5	5	5
No health benefits	8	6	7	10	10	2	6	7	9

Personal Attitude Statements

2016	Current Pet Owners	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Survey Pet Owners	(12,581)	(8,701)	(6,773)	(1,790)	(881)	(729)	(553)	(289)
	%	%	%	%	%	%	%	%
People should only have pets if committed to spending time with it	85	85	85	83	82	84	85	85
Pets are a good source of affection	85	85	85	81	82	84	87	87
Exercising with a pet is more enjoyable than exercising alone	59	68	54	62	65	63	67	72
I am aware that owning a pet can be beneficial to my health	81	82	82	79	80	82	84	85
Buying eco-friendly products is important to me	45	46	47	48	54	51	49	50
Interacting with a pet can help me relax	82	83	84	79	83	83	85	86
Pets bring family members closer together	71	74	71	71	74	75	78	76
I want my children to have the experience of growing up with a pet	64	68	63	69	68	77	77	73
Pets are easier to take care of now than in the past	41	42	43	43	53	48	46	45
Pets are happier with another pet at home	52	54	58	57	63	62	65	66
The health benefits of pet ownership are very important to me	66	69	66	63	69	66	72	71
It's important to me to shop for the best deal/use coupons	68	68	69	70	68	72	71	65
Having a pet is a conversation starter	66	68	65	65	69	69	72	68
Buying BPA-free pet products is important to me	42	45	43	45	53	49	47	44
Buying pet products made in the USA is important to me	61	64	60	60	65	60	61	68

Influence of the Economy on Pet Ownership

- Compared to 2014, the percentage of pet owners spending less on their pet because of the economy has gone down slightly and the percentage spending more on their pet has risen slightly.
- Most pet owners say their pet ownership is not influenced by the state of the economy.

2016	Current Pet Owners	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Pet Owners	(12,581)	(8,701)	(6,773)	(1,790)	(881)	(729)	(553)	(289)
	%	%	%	%	%	%	%	%
Spend less money on pet	15	17	16	17	20	20	21	24
Spend more money on pet	10	11	11	13	21	17	14	21
Didn't get a pet	3	3	3	5	7	4	5	7
Had to give up pet	2	2	2	3	5	5	5	9
Not influenced by economy	73	70	72	69	61	64	65	58

Pets in the Workplace

- 11% of pet owners indicate pets are allowed at their workplace.
- In 2014, that number was 8%.

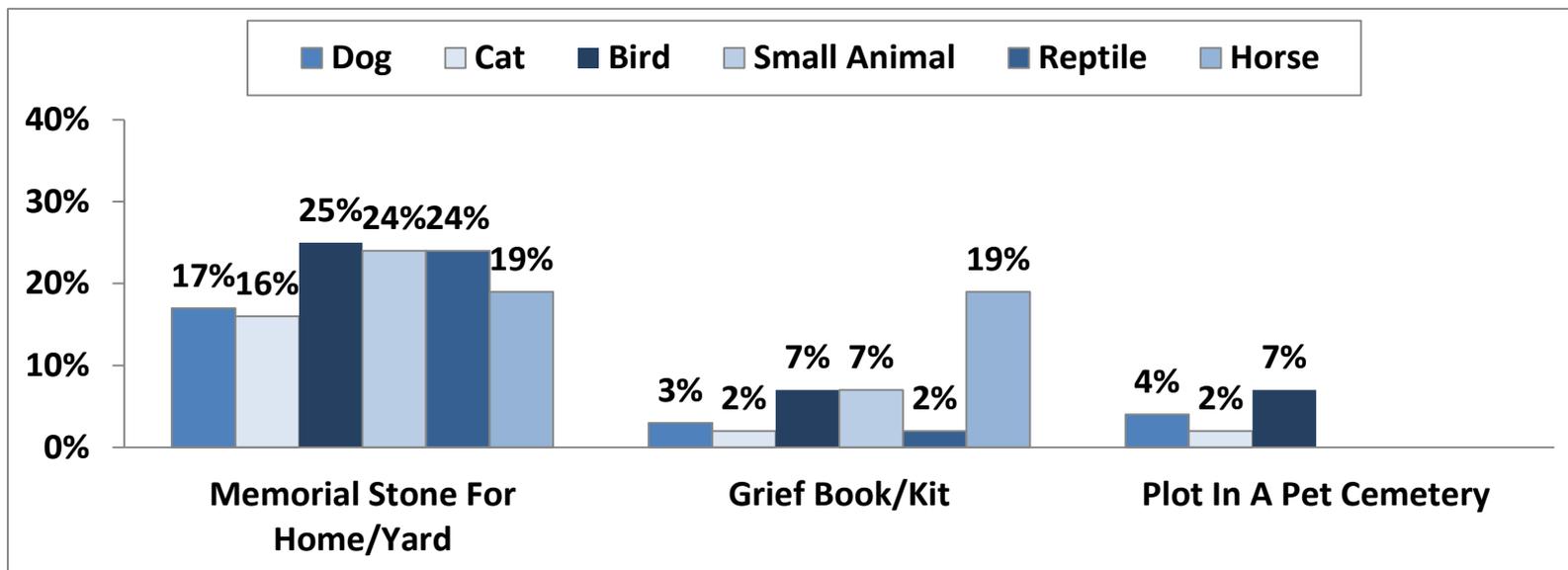
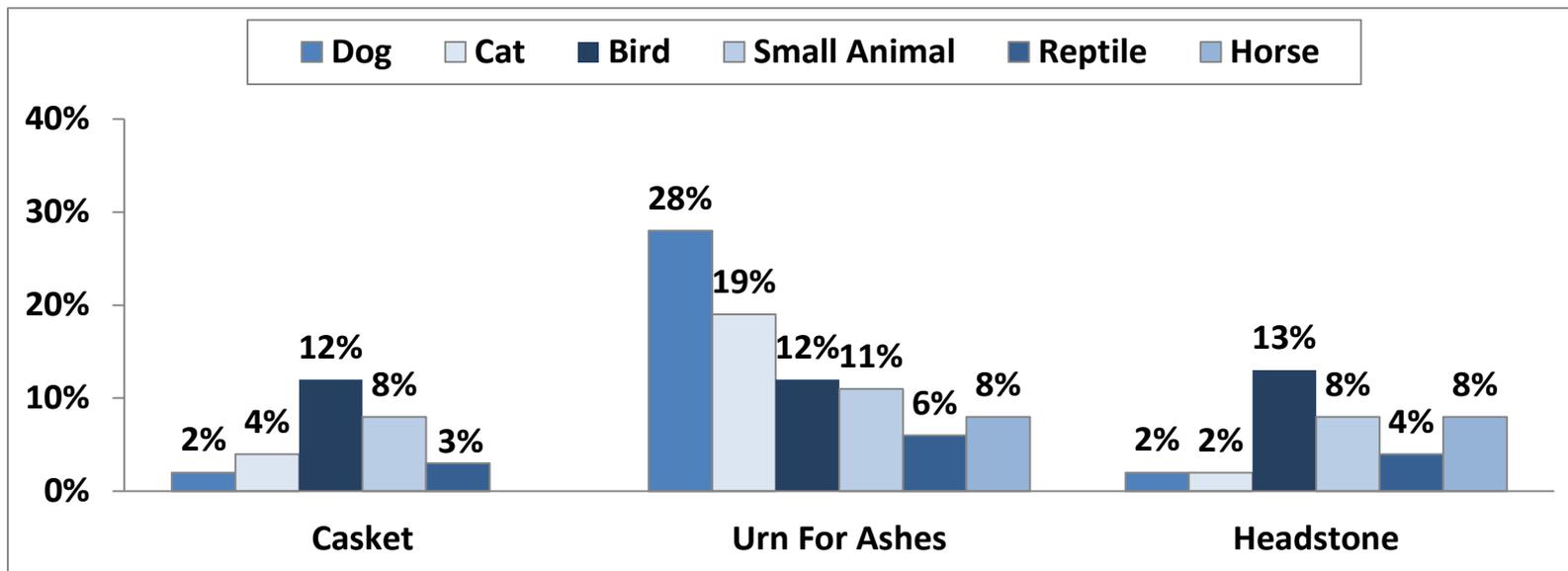
2016	Current Pet Owners	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Pet Owners	(12,581)	(8,701)	(6,773)	(1,790)	(881)	(729)	(553)	(289)
	%	%	%	%	%	%	%	%
Yes	11	13	12	15	23	17	16	31
No	47	48	46	47	39	47	45	34
Don't know/Not sure	4	4	4	5	5	5	6	5
Not applicable	38	35	38	34	33	31	33	31

Provisions for Pet in Owner's Will

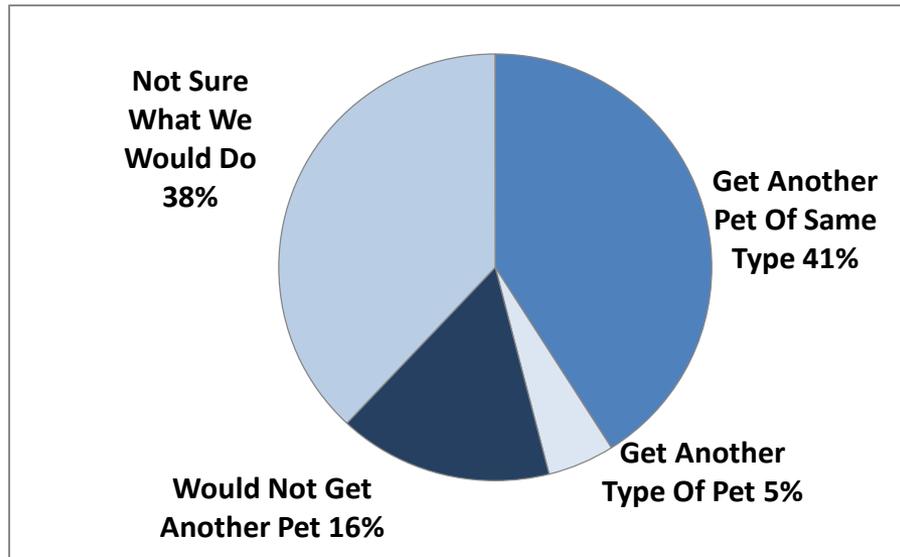
- Making provisions (either financial or naming a caretaker) for pets in the owners' wills is becoming more common, especially among Gen Y owners.
- Owners of horses, birds and fish are the most likely to financially provide for their pets.
- Caretakers have been named by more than half of all horse owners and close to 40% of dog, cat, bird, small animal and reptile owners.

2016	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Survey Pet Owners	(505)	(451)	(451)	(301)	(300)	(301)	(250)
	%	%	%	%	%	%	%
Financially provided for your pet	12	12	21	25	18	7	29
Have a caretaker/guardian for your pet	37	39	25	39	39	38	56
Neither of these	56	57	60	46	54	60	35

What Owner Would Buy Upon Death of Pet



What Owner Would Do If Their Pet Died

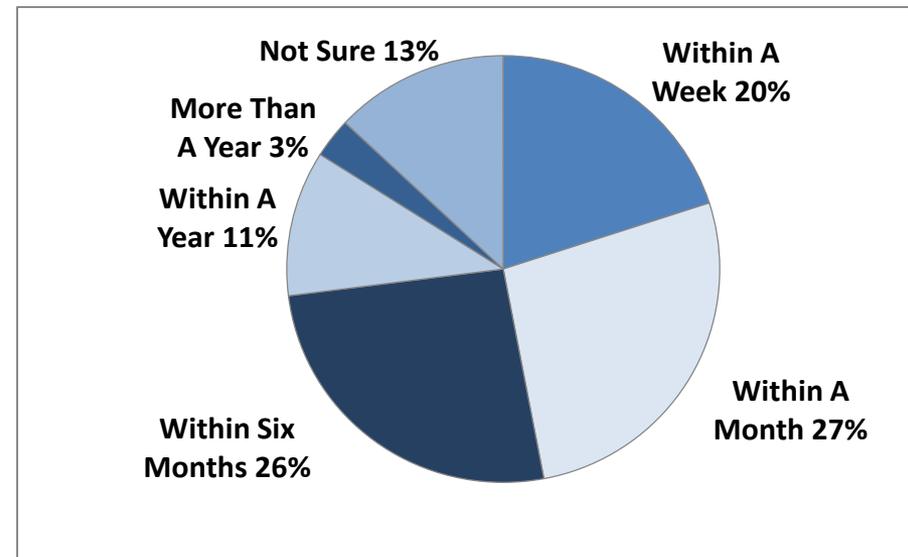


What Owner Would Do if Their Pet Died

- 41% of pet owners would get another pet of the same type if their current pet died.
- 5% would get a different type of pet.
- Both numbers are higher than previously reported.

How Long Would Pet Owner Wait to Get a New Pet

- 20% of those who would get another pet would do so within a week, while 27% would do so within a month.
- One-quarter would get a new pet within six months.



Previous Pet Ownership (by Current Pet Owners)

- 85% or more of all pet owners indicate they have previously owned a pet.
- More than one-third of reptile and horse owners and one-quarter of cat owners got their current pet while they still had their previous one.

2016	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Survey Pet Owners	(505)	(451)	(451)	(301)	(300)	(301)	(250)
	%	%	%	%	%	%	%
Owned a Previous Pet	85	93	89	85	91	93	98
Base: Total Pet Owners Who Previously Owned a Pet	(429)	(418)	(401)	(256)	(274)	(280)	(245)
	%	%	%	%	%	%	%
Length of Time Between Previous and Current Pet:							
One week or less	5	4	12	8	7	3	9
One month or less	10	9	13	16	12	8	5
Six months or less	18	18	18	22	21	17	19
One year or less	8	7	12	8	10	9	8
More than a year	35	28	19	17	24	19	11
Got current pet while I still had my previous pet	17	27	19	20	20	35	38

Reasons for Owning Multiple Pets

- Dog and cat owners with multiple pets say the primary reason for owning more than one pet is companionship for each other, followed by the owner's enjoyment of multiple pets.
- Companionship for the owner is given as a reason by close to half of all pet owners with multiple pets.

2016	Dog	Cat	Total Fish	Bird	Small Animal	Reptile	Horse
Base: Total Pet Owners with Multiple Pets	(208)	(334)	(439)	(275)	(269)	(277)	(249)
	%	%	%	%	%	%	%
Pets are companions for each other	65	64	39	45	48	33	53
Enjoy having multiple pets	50	53	55	52	67	70	63
Companionship for me/my family	43	52	43	48	54	46	56
Rescued from a shelter	26	24	19	26	23	18	35
Health benefits for me/my family	16	18	25	25	29	16	34
Pets are related/Didn't want to separate them	12	18	13	15	13	8	16
Blending families/Moved in together	6	7	11	14	10	5	8
Other	9	12	12	7	9	9	11

Interesting Facts We Learned from This Survey...

- **The humanization of pets continues to be a driving factor for the pet industry. More than ever before pet owners are:**
 - **Feeding their pets as they do themselves, with more turning to organic or grain-free options.**
 - **Giving their pets vitamins/other supplements.**
 - **Purchasing treats for their pets.**
- **Millennials (Gen Y), in particular, are taking the humanization of their pets to the next level. For example, Gen Y dog owners are more likely to:**
 - **Take their pet to the vet more often, give them flavored oral medication and give them vitamins**
 - **Pay for any pet service (day care, boarding, pet sitting at home)**
 - **Have been to a pet-friendly restaurant**
 - **Take their dog with them on errands and to a dog park**
 - **Own designer items for their pet and hold parties for their dog**
 - **Buy gifts for more occasions, spending more per gift and getting more gifts in total**

Unleash the Benefits of Pet Ownership!

- **Once a pet owner, always a pet owner! More pet owners say they will get another pet when the time comes.**
- **Pets will be taken care of when their owner dies, with financial arrangements and a caretaker named for them.**
- **The use of electronic tracking devices continues to increase – pet owners want to keep their pet safe.**
- **The role of the Internet continues to expand, with more pet owners shopping online for pet supplies and social media playing an increasing role in educating pet owners on new pet products.**
- **Brand name is very important to more pet owners than ever and more pet owners are spending more money on their pet.**
- **Pets continue to be an important part of their owners' lives, providing companionship and love, relieving stress and offering a host of other health benefits. In turn, pet owners are humanizing pets more than ever!**



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