

2021-2022 APPA National Pet Owners Survey

Business/Finance Fact Sheet

Overview

2020 was a year of profound impact and change, and the pet industry experienced its share of both. The industry exceeded over \$100 billion in sales for the first time last year, according to APPA's 2020 State of the Industry Report. APPA is bullish for the coming year, projecting growth of 5.8%, well above the historical average of 3% to 4%.

According to the 2021-2022 APPA National Pet Owners Survey, 70% of U.S. households own some type of pet, up from 67% in the 2019-2020 Survey. In fact, 14% of total respondents (pet owners and non-pet owners) obtained a new pet during the pandemic and at least one in four new pet owners said their recent pet acquisition was influenced by the pandemic. Millennials were also revealed to be the largest cohort of pet owners at 32%, followed closely by Boomers at 27% and Gen X at 24%.

Key Findings

COVID-19 Drove Pet Acquisition

Fourteen percent of total respondents (pet owners and non-pet owners) obtained a new pet during the pandemic. Additionally, at least one in four new pet owners shared their recent pet acquisition – including saltwater fish (60%), dogs (47%), birds (46%), small animals (46%), cats (40%), freshwater fish (34%), reptiles (27%) and horses (27%) – was influenced by the pandemic.

Pet Spending is on the Rise

Pet spending increased during the past year, with 35% of pet owners stating they spent more on their pet/pet supplies – including food, wellness-related products and other pet care items – in the last 12 months than in the preceding year. The average amount spent to purchase pets varies widely depending on the type of pet owned. Horse owners spend the most by far. Dogs are the next most expensive pets with an average purchase price of \$498. Many pet owners have demonstrated an increase in spending in the past 12 months, with food as a top expense, regardless of pet type owned. Veterinarian care is also a greater expense for pet owners.

Online Shopping Surges

Pet owners shopping online increased by almost 20%, from 72% in the prior year to 86% of responses in this year's study. Before the pandemic, 60% of pet owners usually purchased pet products in person at brick-and-mortar stores. During the pandemic, in-person shopping dropped to 41%, aligning more closely with the 46% of pet owners who prefer to purchase online with purchases shipped to their home. Online purchasing was up for all pet care categories tracked in the Survey.

In the 2019-2020 Survey, browsing in a store was the No. 1 way a pet owner became aware of new pet products. Given the impact of COVID-19 on the retail sector in 2020, browsing in a store was greatly reduced (from 56% to 42%). In line with this, the percentage of pet owners who learned about pet products by surfing the internet was nearly equal to the percentage who found new products by browsing in a store in 2020. When asked how they anticipate their online shopping for pet products will change in the coming year, many pet owners said they felt their use of home delivery, pickup in-store and pickup curbside would remain the same.

Pet Owners Report Being Influenced by Brand Name

Pet owners spent more money on their pet and pet supplies, with more indicating brand name is important to their purchasing decision. Between two-thirds and three-quarters of all pet owners report brand name is important on some level.

State of the Economy Affects Pet Spending

Thirty-five percent of current pet owners surveyed said that the state of the economy has influenced them to spend more money on their pet and pet supplies in the past 12 months, while 57% report spending the same. Sixty percent of pet owners say they consider their pet when making financial plans.

Survey Background

Since 1988, the American Pet Products Association (APPA) has collected and published the pet industry's most comprehensive consumer research study about pet ownership, pet care practices, and preferences in the consumption of product and services by America's pet owners. Published every other year, it is used by all sectors of the pet products industry and those looking to enter the market, including manufacturers and retailers, marketers, research and investment firms and media professionals alike to understand their consumers and define their business strategies.

The premier resource for members of the pet care community, this year's Survey was expanded to include new content and additional insights on topics like online purchasing behavior, preferred method of purchasing, pet product development and coronavirus-specific questions to understand how pet acquisition was impacted by the pandemic. In addition, the 2021-2022 APPA National Pet Owners Survey contains a lifestyle and media study, which examines what motivates pet ownership and relationships with pets, along with habits such as internet usage, travel, work and other demographic criteria.

A total of 9,206 pet owners are included in the 2021-2022 National Pet Owners Survey. Invitations to the online survey were sent to a nationally representative sample that was balanced using U.S. Census targets for gender, age, region, race/ethnicity, income and household size. The Survey was fielded in December 2020.

For more information, visit AmericanPetProducts.org/Survey.

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