KANTAR

Understanding the challenges to pet care in 2022 and the impact of the cost-of-living crisis on pet ownership

A report prepared for NOAH

NOAH
Supporting the future of animal health

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Contents

Background and objectives

Background

In Q1 2022 NOAH undertook a study focussing looking at the impact of the Covid pandemic on dog and cat ownership, with a focus on, but not exclusively addressing, new dog or cat owners by asking about the most recently acquired pet. This study ascertained the needs and requirements of these new pet owners plus the preparedness of the veterinary services and other routes needed to serve them

Context

The UK is being hit by a cost-of-living crisis which has impacted on some pet owners' ability to continue to afford to keep their pets. There have been changes to people's lifestyles, as many people are spending more time out of the home post-pandemic lockdowns (for example, returning to a fixed place of work). NOAH wishes to understand the extent of this, and how financial and other pressures are impacting pet ownership, particularly focussing on disease prevention

Objectives

Building on NOAH's Q1 2022 pet population and health study, to identify the impact of challenges to pet ownership, including the cost-of-living crisis on preventive health of dogs and cats

Summary of approach

1,500 x

Respondents

- Methodology: online CAWI
- Sample universe: Cat or Dog owners aged 16+ years in the UK
- Sample collected: n = 885 Cat owners, n = 1,000 Dog owners – asking about one specific pet aiming to get a minimum base per Cats, Dogs and pet age
- In depth questions asked in relation to selected Cats and Dogs to cover all age groups

30 Nov – 13 Dec 2022

Fieldwork period

- Quotas: nationally representative on pet owner gender, age and region
- In depth section: quotas applied by Cat and Dog age to ensure robust representation of each group
- No weighting applied

10 x

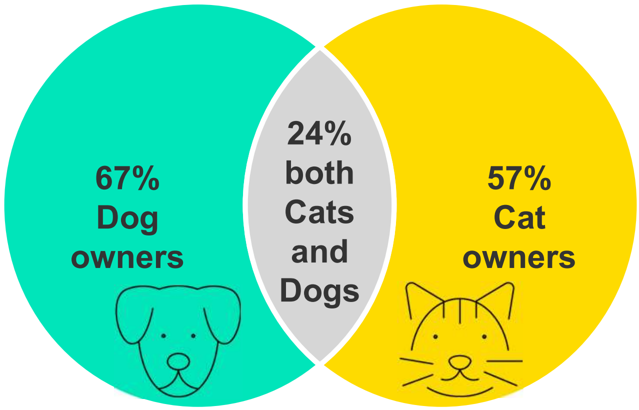
Minute online interviews

- Demographics, impact of cost-of-living crisis
- Cat & Dog ownership (number of pets, age, level of responsibility for the pet/s, vet registration)
- Vet appointments
- Pet insurance, Pet health club or health plan scheme, Vaccinations
- Prevention and treatment of parasites as well as respondents' compliance to instructions on the label

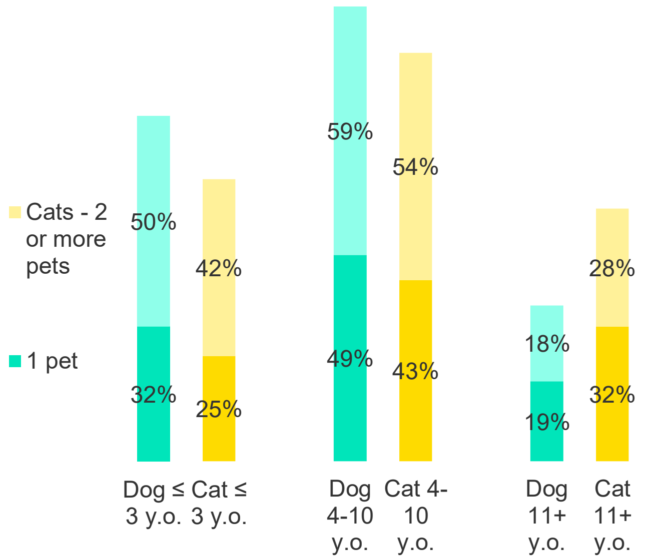
1
Pet household composition

Good representation of cat and dog household, different pet ages and single and multiple pet households

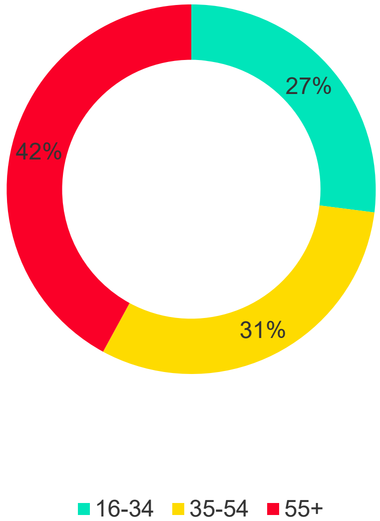
Household composition by pet



Pet age by cats and dogs



Pet owner age – national representative split

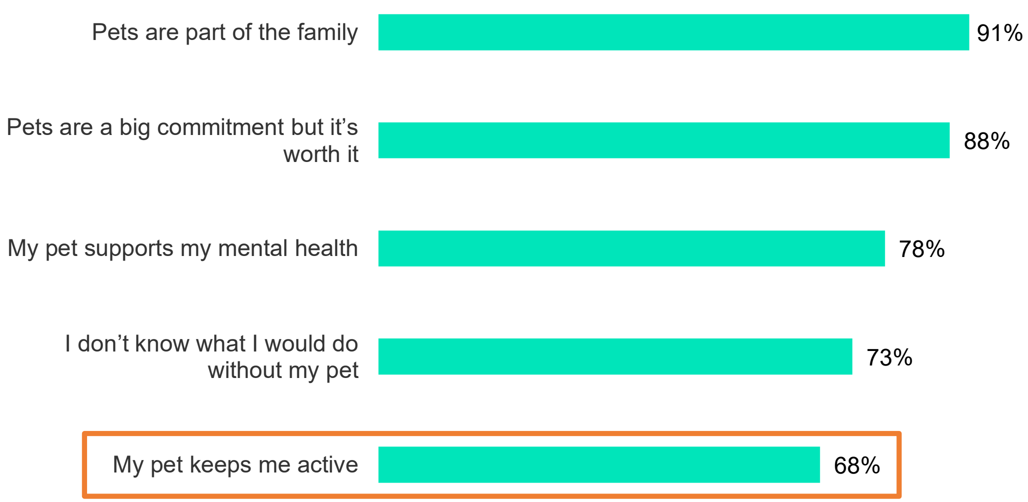


Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which Dog owners (n = 1,000) and Cat owners (n = 855), Dogs up to 3 y.o. (n = 412), Cats up to 3 y.o. (n = 308), Dogs 4-10 y.o. (n = 539), Cats 4-10 y.o. (n = 429), Dogs 11+ y.o. (n = 187), Cats 11+ y.o. (n = 254)
QNO1. You said you have a dog/ cat currently in your home. Please indicate how many you have:
Qdog/ cat_Age. Please select the age of your dog(s)/ cat(s).

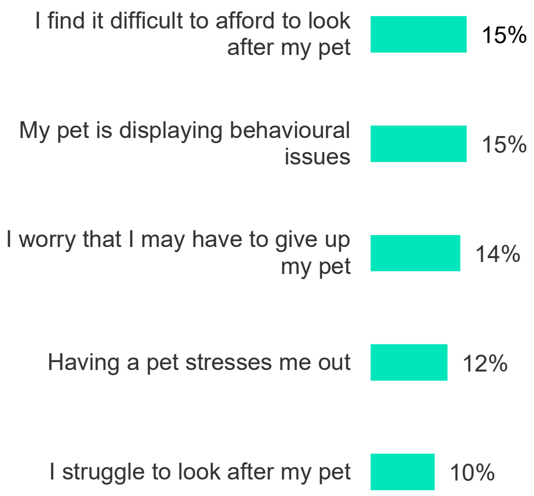
2 Attitudes to pet ownership

Most respondents agree with the positive statements related to pet ownership and fewer agree with the negative ones

Respondents who definitely/ tend to agree with each positive statement



Respondents who definitely/ tend to agree with each negative statement



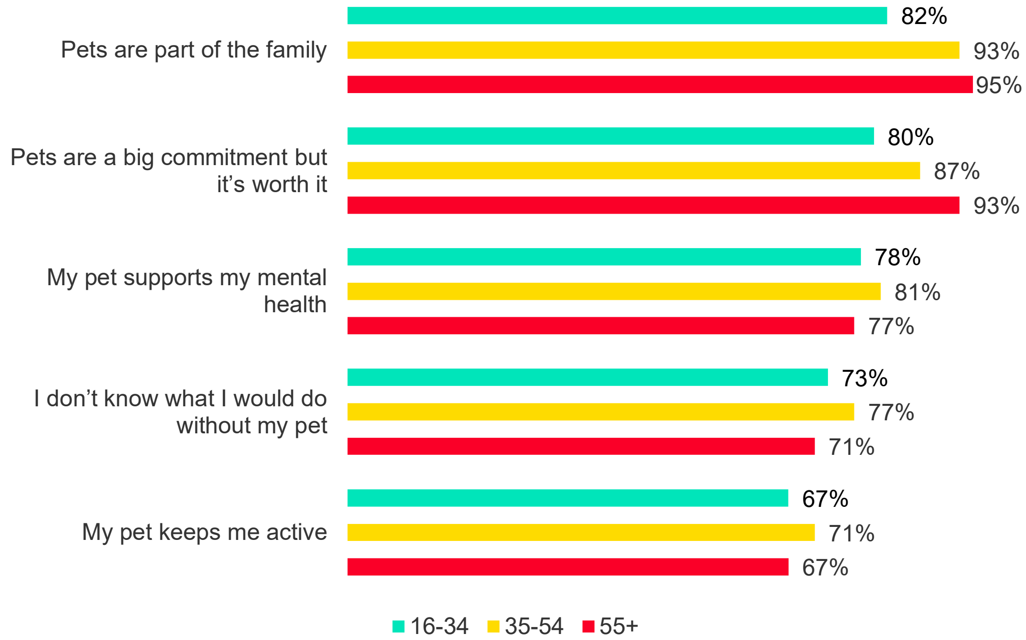
Similar attitudes between Cat and Dog owners for most statements except for the "My pet keeps me active" – 83% of Dog owners agree vs. 56% of Cat owners

No significant differences in attitudes found compared to Jan 2022 data

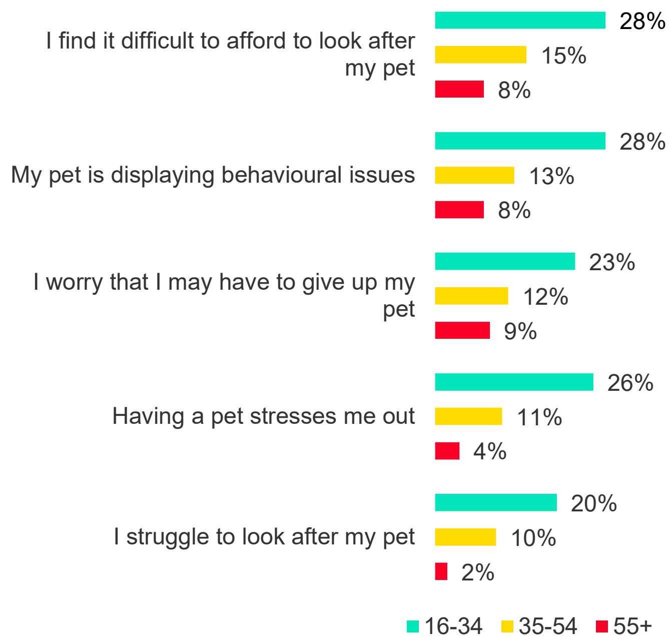
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500)
Q.Atts1. People love their pets, but life is not always easy. We would like to know how sharing your life with your pet impacts on your own life and feelings – both the good and the bad. To what extent do you agree or disagree with the following statements? - Definitely agree OR Tend to agree

Younger respondents tend to agree more than the older age groups with the negative statements related to pet ownership

Respondents who definitely/ tend to agree with each positive statement by age



Respondents who definitely/ tend to agree with each negative statement by age



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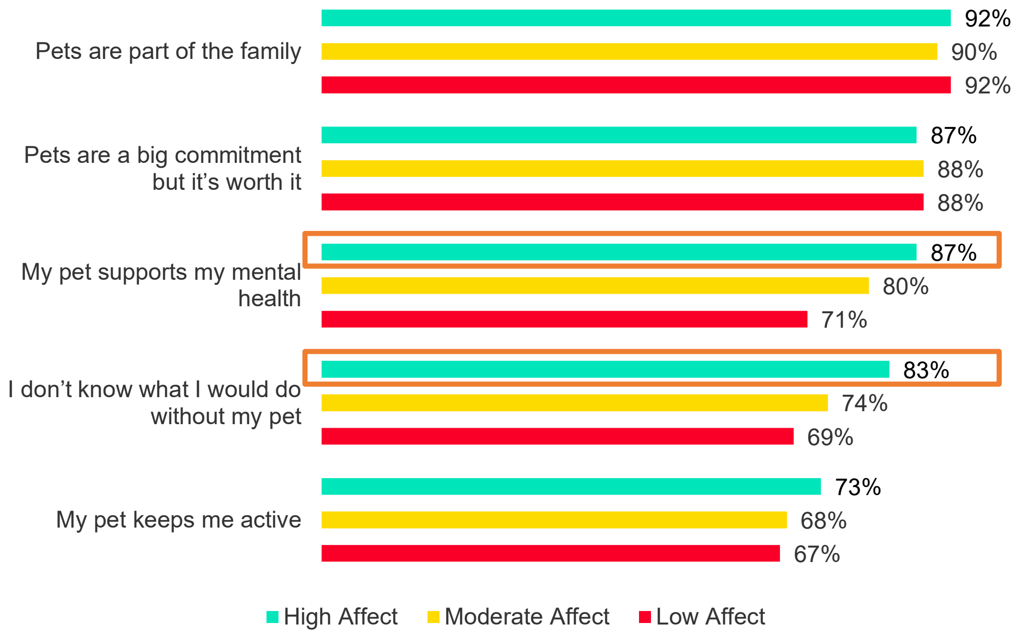
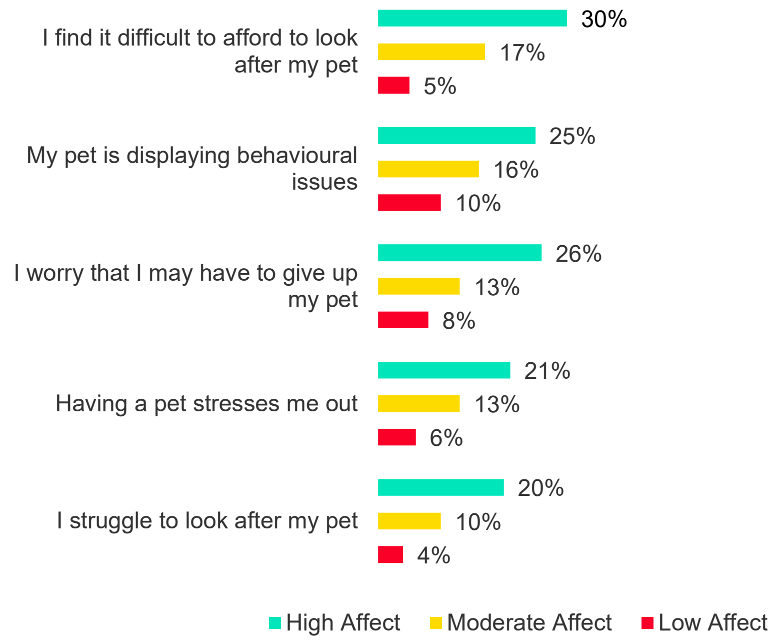
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which 16-34 y.o. (n = 405), 35-54 y.o. (n = 464), 55+ y.o. (n = 631)
Q.Atts1. People love their pets, but life is not always easy. We would like to know how sharing your life with your pet impacts on your own life and feelings – both the good and the bad. To what extent do you agree or disagree with the following statements? - Definitely agree OR Tend to agree

Respondents who were highly affected by the cost-of-living crisis are more likely to agree with the negative statements, but are also more likely to agree that pets support their mental health, being active as well as pets being an integral part of their lives

Respondents who definitely/ tend to agree with each positive statement by the effect of cost-of-living crisis



Respondents who definitely/ tend to agree with each negative statement by the effect of cost-of-living crisis



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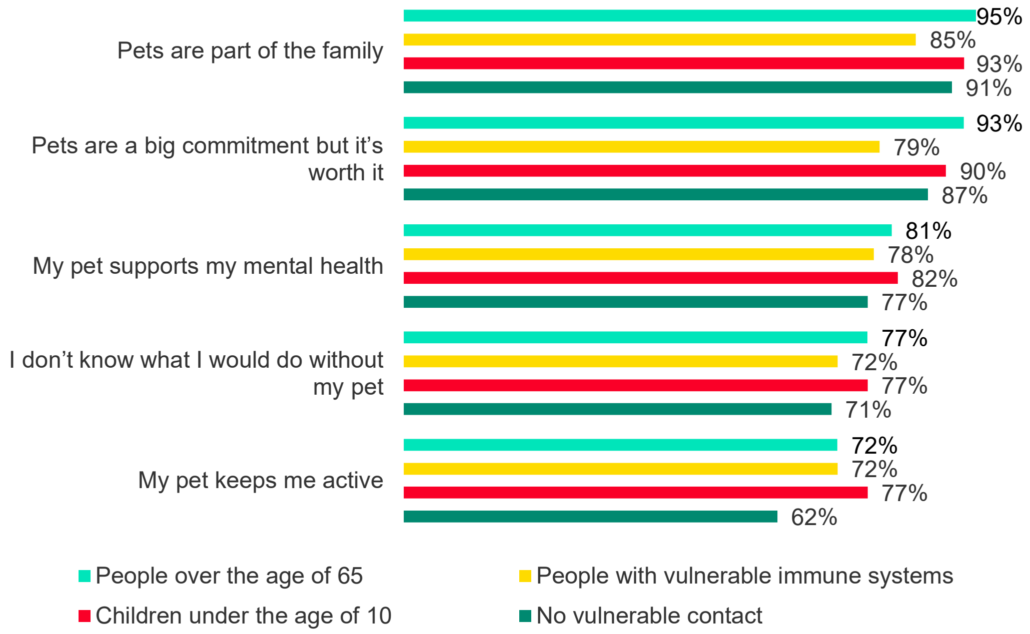
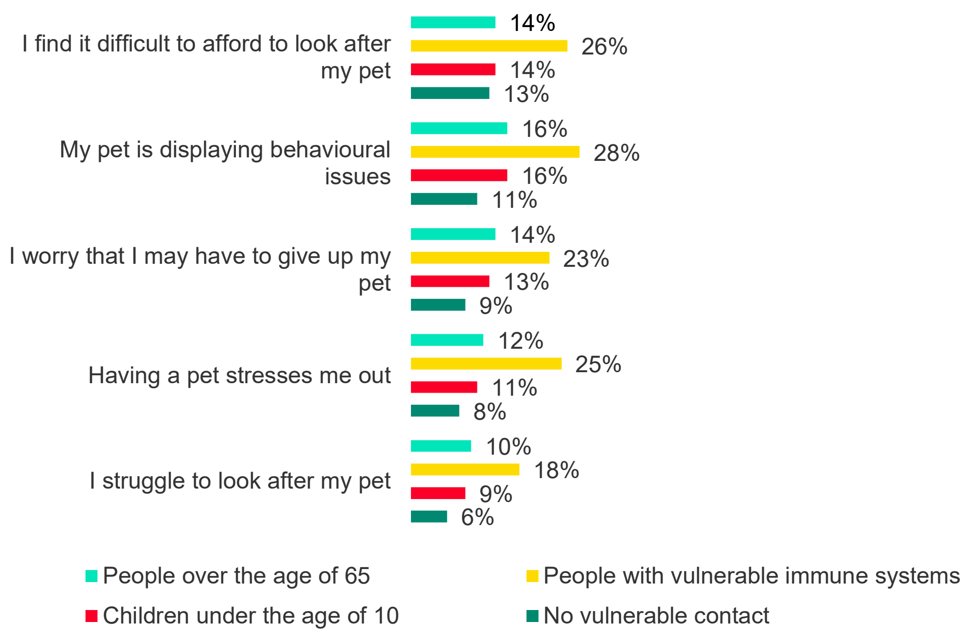
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which High effect (n = 219), Moderate effect (n = 829), Low effect (n = 452)
Q.Atts1. People love their pets, but life is not always easy. We would like to know how sharing your life with your pet impacts on your own life and feelings – both the good and the bad. To what extent do you agree or disagree with the following statements? - Definitely agree OR Tend to agree

Respondents who have a person with a vulnerable immune system tend to agree more with the negative statements while those with a person over 65 y.o. or with kids below 10 y.o. tend to agree more with the positive statements

Respondents who definitely/ tend to agree with each positive statement by household composition



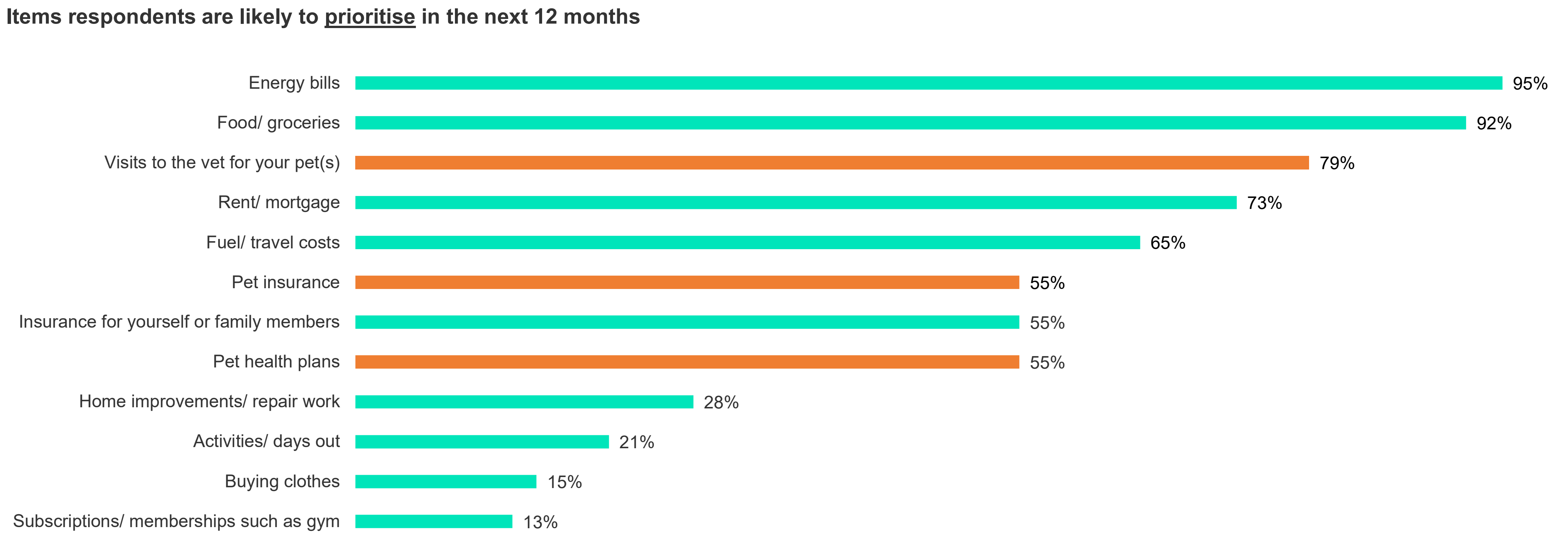
Respondents who definitely/ tend to agree with each negative statement by household composition



Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which People over the age of 65 (n = 620), People with vulnerable immune systems (n = 257), Children under the age of 10 (n = 437), No vulnerable contact (n = 514)
Q.Atts1. People love their pets, but life is not always easy. We would like to know how sharing your life with your pet impacts on your own life and feelings – both the good and the bad. To what extent do you agree or disagree with the following statements? - Definitely agree OR Tend to agree

3
Pet healthcare and the cost-of-living crisis

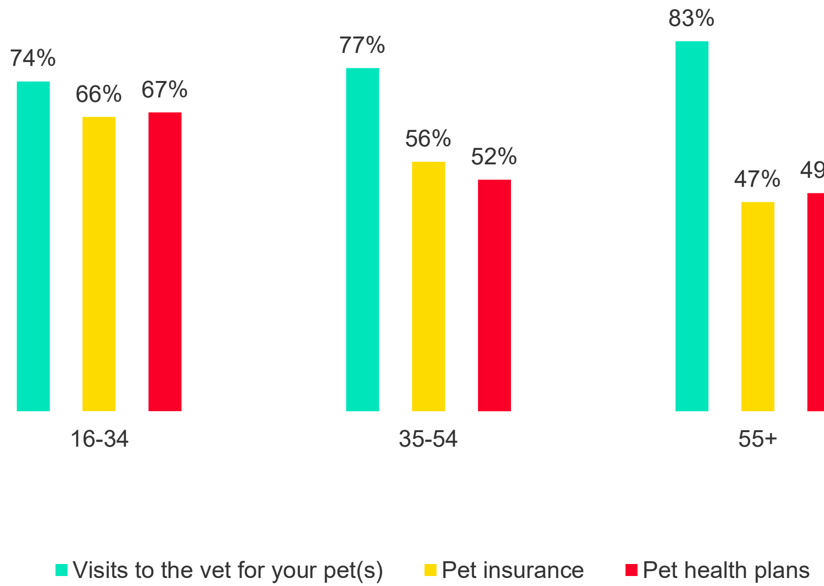
Vet visits feature high on respondents' priorities, while pet insurance and health plans are prioritised by 55% of respondents



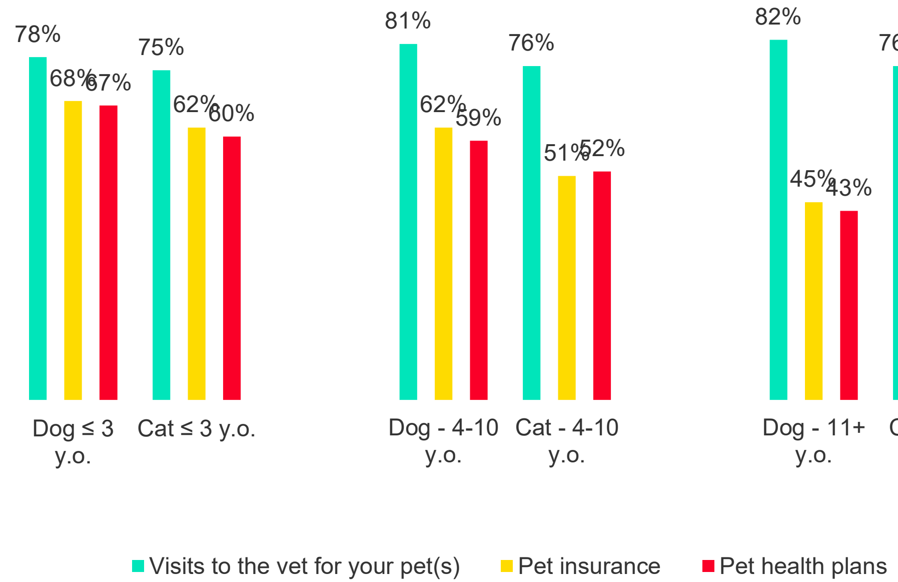
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500)
CoL3 Which things, given the rise in the cost of living, would you be likely to prioritise or de-prioritise within your household in the next 12 months? - Prioritise

Vet visits are prioritised by all age groups, but pet insurance and health plans tend to reduce in likelihood to be prioritised by older age owners and for older age pets

Pet spending likelihood to be prioritised in the next 12 months by age



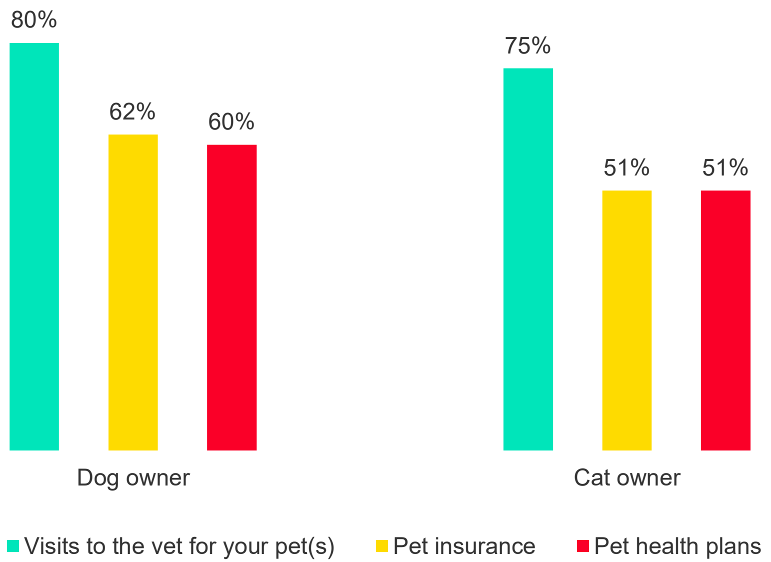
Pet spending likelihood to be prioritised in the next 12 months by pet age



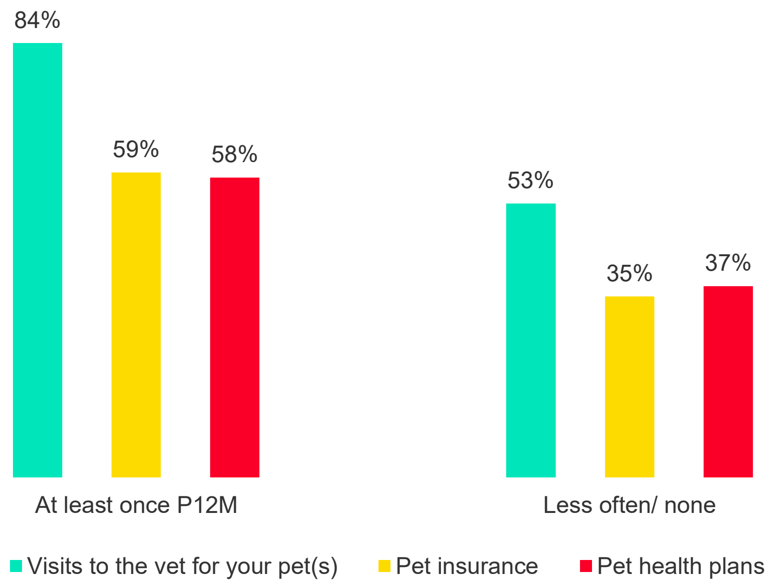
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which 16-34 y.o. (n = 405), 35-54 y.o. (n = 464), 55+ y.o. (n = 631), Dog – up to 3 y.o. (n = 412), Dog - 4-10 y.o. (n = 539), Dog - 11+ y.o. (n = 187), Cat – up to 3 y.o. (n = 308), Cat - 4-10 y.o. (n = 429), Cat - 11+ y.o. (n = 254)
CoL3 Which things, given the rise in the cost of living, would you be likely to prioritise or de-prioritise within your household in the next 12 months? - Prioritise

Cat owners are slightly less likely to prioritise pet spending compared to Dog owners; respondents who have not had a Vet visit in the past 12 months are also less likely to prioritise pet insurance and pet health plans

Pet spending likelihood to be prioritised in the next 12 months by dog and cat owners



Pet spending likelihood to be prioritised in the next 12 months by number of Vet visits in the past 12 months



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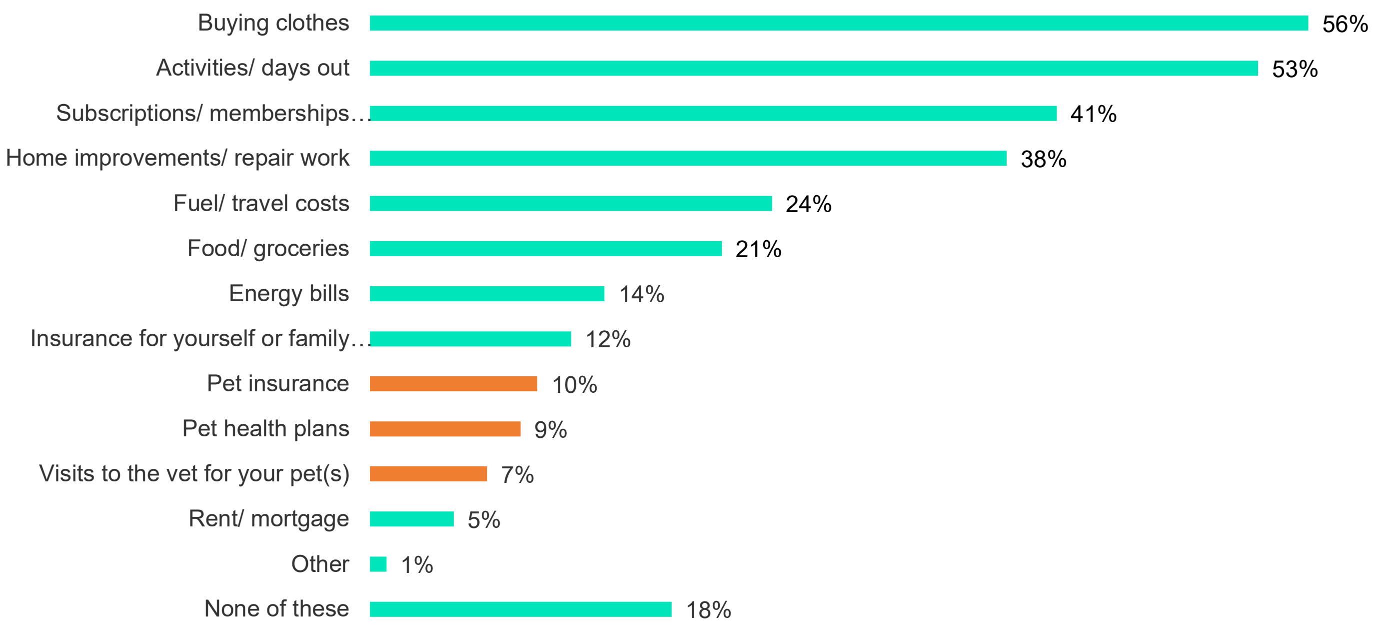
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which Dog owner (n = 1,000), Cat owner (n = 855), At least once P12M (n = 1,241), Less often/ none (n = 259)
CoL3 Which things, given the rise in the cost of living, would you be likely to prioritise or de-prioritise within your household in the next 12 months? - Prioritise

Pet related items feature low on the list of items respondents already reduced or stopped spending on

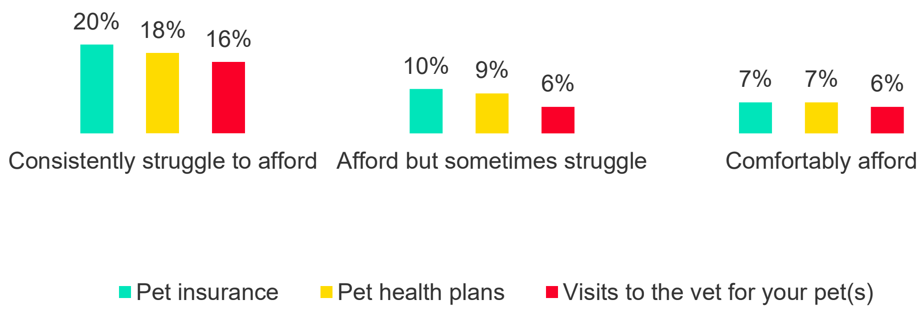
Items respondents have already reduced or stopped spending on



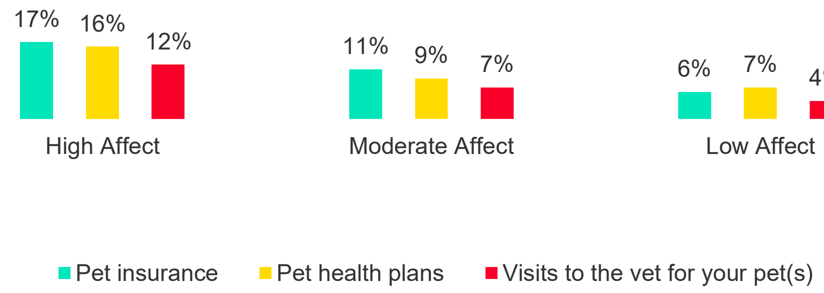
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500)
CoL4 Which of the following have you already reduced or stopped spending on because of the cost-of-living crisis?

Respondents who consistently or sometimes struggle with their finances are more likely to have reduced/ stopped spending on pet items and the same is valid for those who were highly affected by the cost-of-living crisis with pet insurance and health plans being most affected

Items respondents have already reduced or stopped spending on by financial situation



Items respondents have already reduced or stopped spending on by effect of cost-of-living crisis

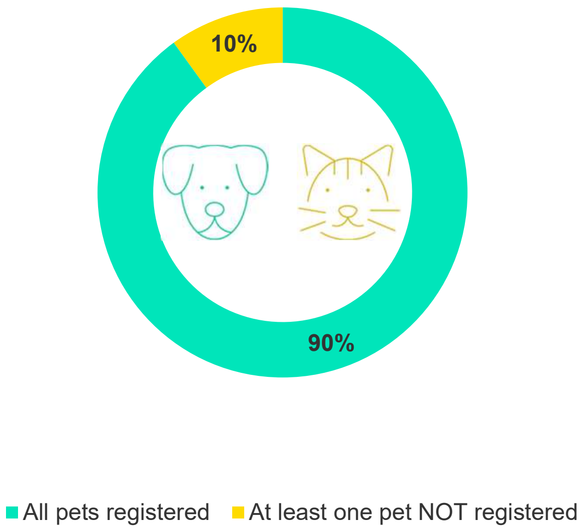


Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which Comfortably afford (n = 604), Afford but sometimes struggle (n = 693), Consistently struggle to afford (n = 184), High effect (n = 219), Moderate effect (n = 829), Low effect (n = 452)
CoL4 Which of the following have you already reduced or stopped spending on because of the cost-of-living crisis?

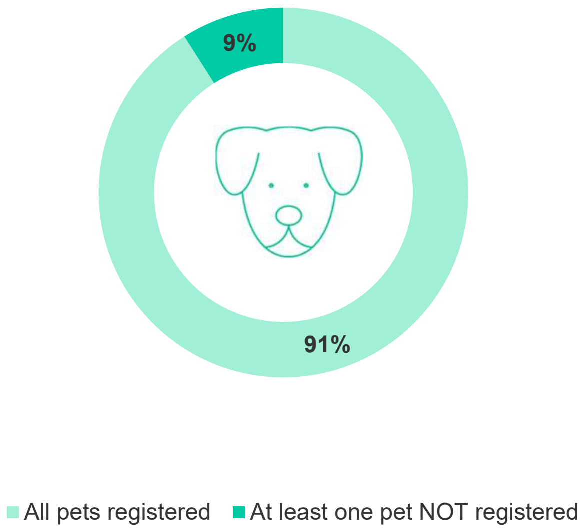
4
Pet healthcare and wellness – Vet focus

The majority of pets are registered with a Vet practice; Dogs are slightly more likely to be registered than Cats, but overall small differences between Cats and Dogs

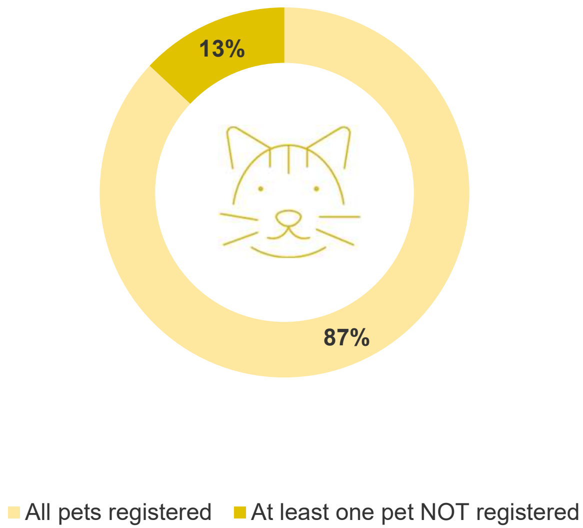
Vet registration – all pets



Vet registration – Dogs



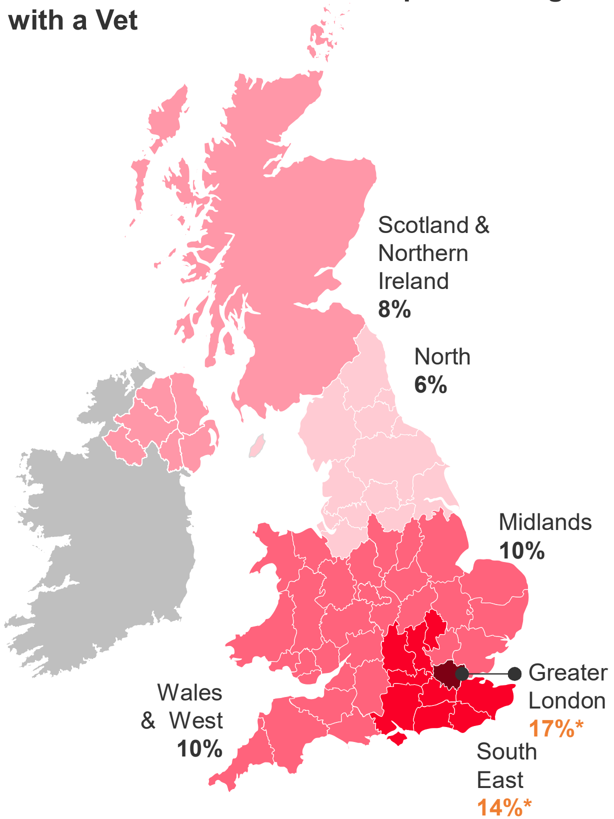
Vet registration – Cats



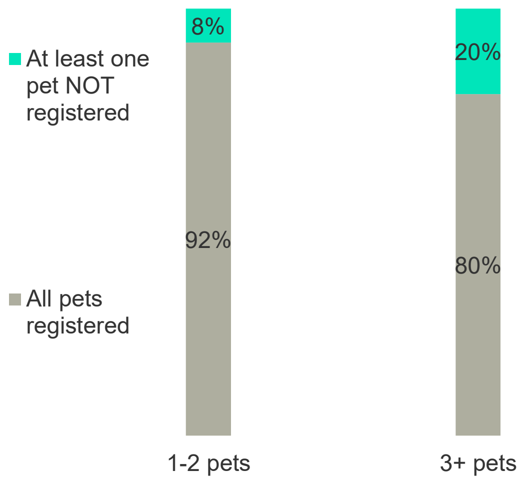
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which Dog owners (n = 1,000) and Cat owners (n = 855)
Q.DOG_CAT_VET. Is your dog/cat currently registered with a veterinary practice?

There are more respondents in London and South East with pets not currently registered with a Vet; also we find more pets not being registered in households with multiple pets and those who were highly affected by the cost-of-living crisis

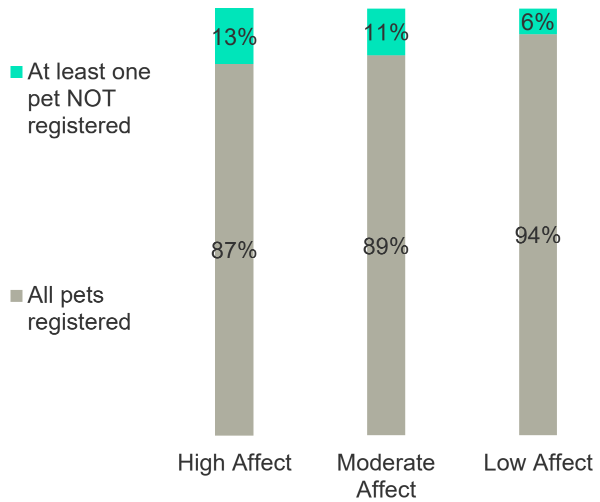
Households with at least one pet NOT registered with a Vet



Vet registration by number of pets in household



Vet registration by effect of cost-of-living crisis



* Significantly higher than North region

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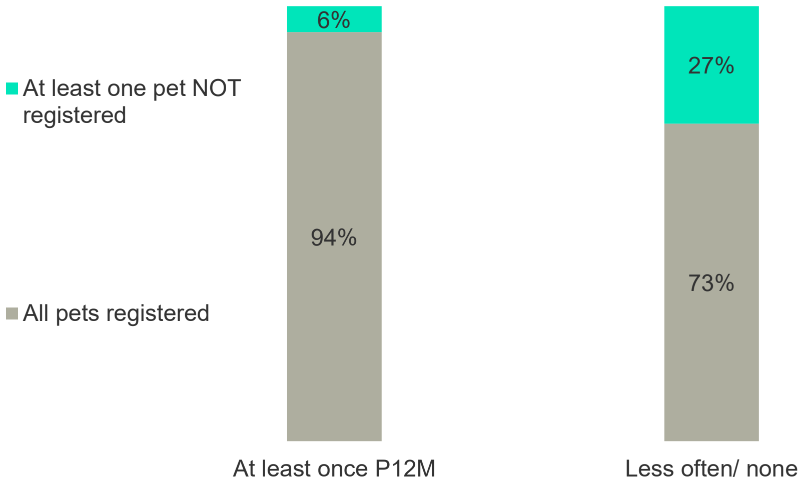
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which Greater London (n = 138), South East (n = 340), Scotland and N. Ireland (n = 160), North (n = 388), Midlands (n = 398), Wales & West (n = 211), 1-2 pets (n = 1,268), 3+ pets (n = 232), High effect (n = 219), Moderate effect (n = 829), Low effect (n = 452)
Q.DOG_CAT_VET. Is your dog/cat currently registered with a veterinary practice?

Respondents who are not registered with a Vet are also more likely to have not had a Vet visit in the past year

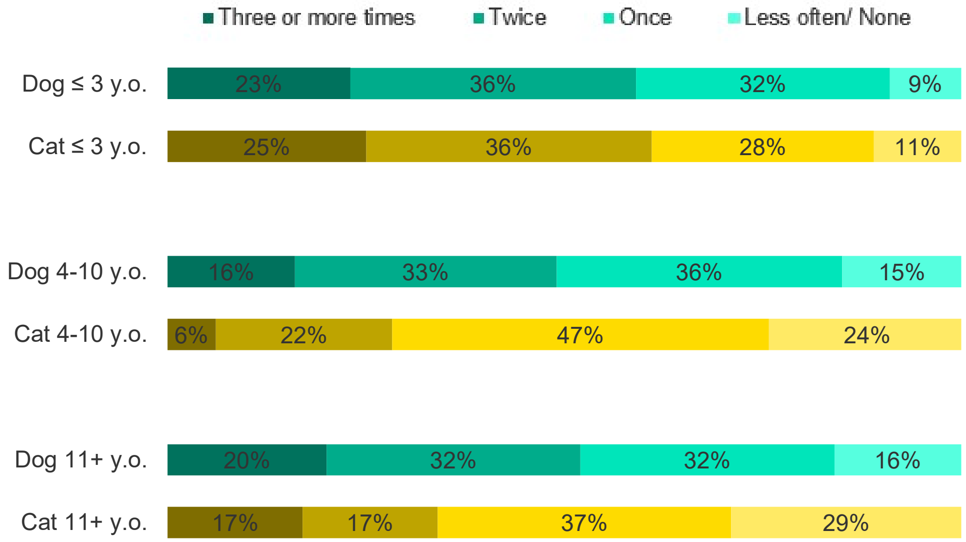
Vet registration by number of Vet visits in the past 12 months



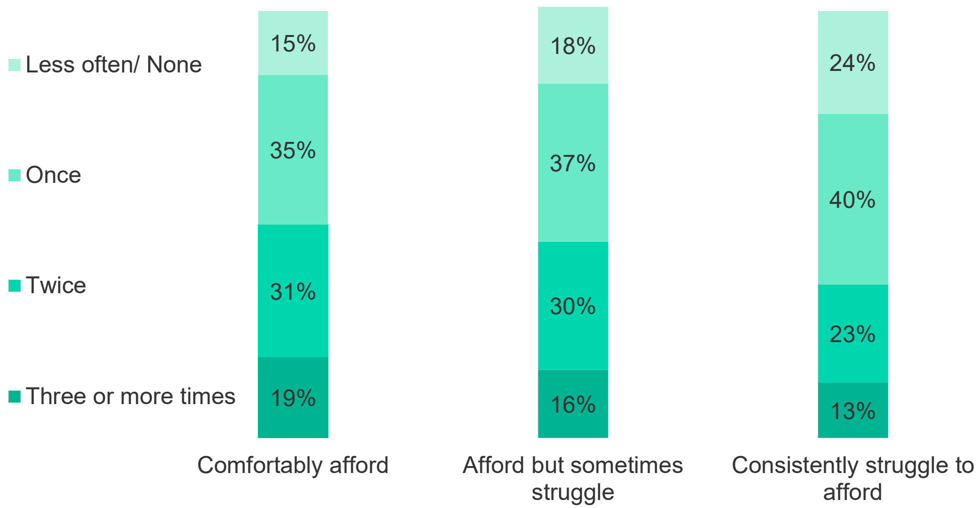
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which At least once P12M (n = 1,241), Less often/ none (n = 259)
Q.DOG_CAT_VET. Is your dog/cat currently registered with a veterinary practice?

Younger pets had more Vet appointments in the past year than older pets; respondents who state that they constantly struggle with their finances had fewer Vet appointments

Number of Vet appointments in the past 12 months by age of pet



Number of Vet appointments in the past 12 months by financial situation



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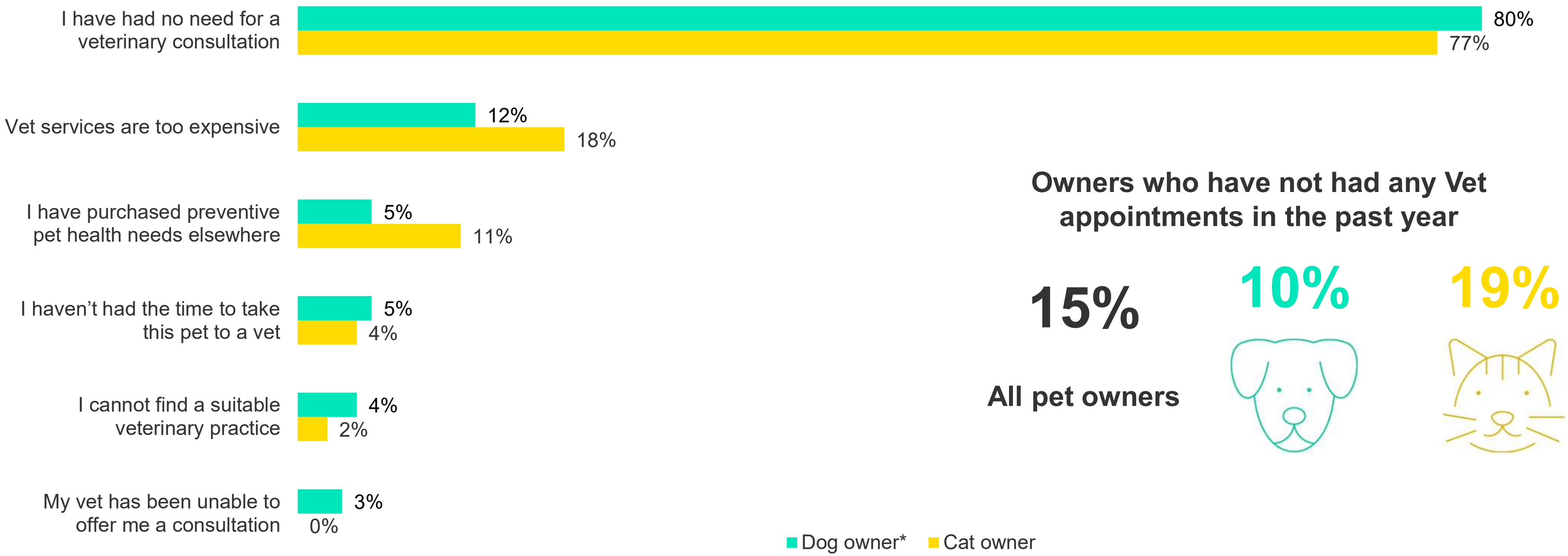
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which Dogs up to 3 y.o. (n = 412), Cats up to 3 y.o. (n = 308), Dogs 4-10 y.o. (n = 539), Cats 4-10 y.o. (n = 429), Dogs 11+ y.o. (n = 187), Cats 11+ y.o. (n = 254), Comfortably afford (n = 604), Afford but sometimes struggle (n = 693), Consistently struggle to afford (n = 184)
Q.Vet1. How often in the past 12 months only, if at all, have you had an appointment with the vet either in person or virtually (not including any visits for grooming) for this cat/ dog aged ?

Most respondents who have not had any Vet appointments in the past year state that they did not need one or find the appointments too expensive

Reasons for not having had any Vet appointments in the past 12 months by Cats and Dogs



Owners who have not had any Vet appointments in the past year

15%

All pet owners

10% **19%**

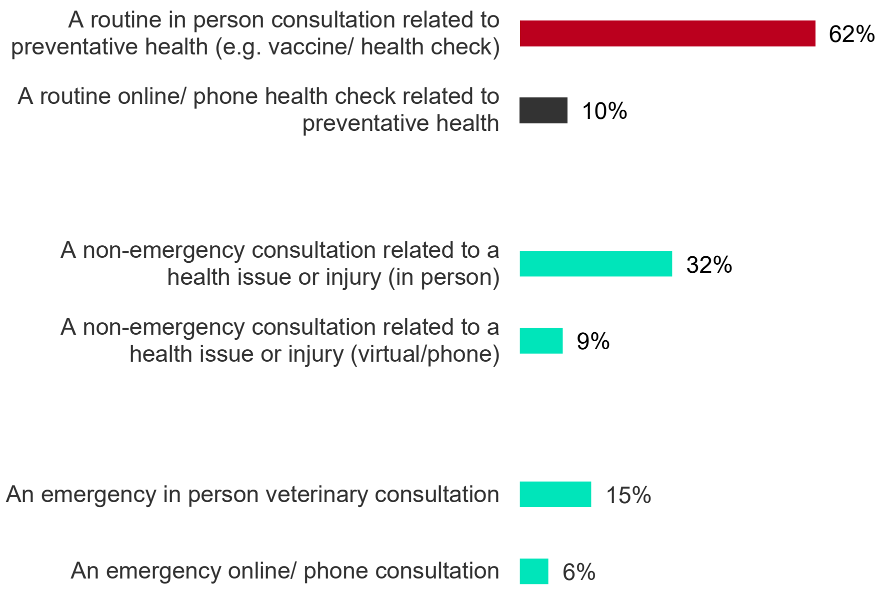
No significant difference found between Cats and Dogs in terms of rationale for not having had Vet visits P12M

*Warning small base size n<100

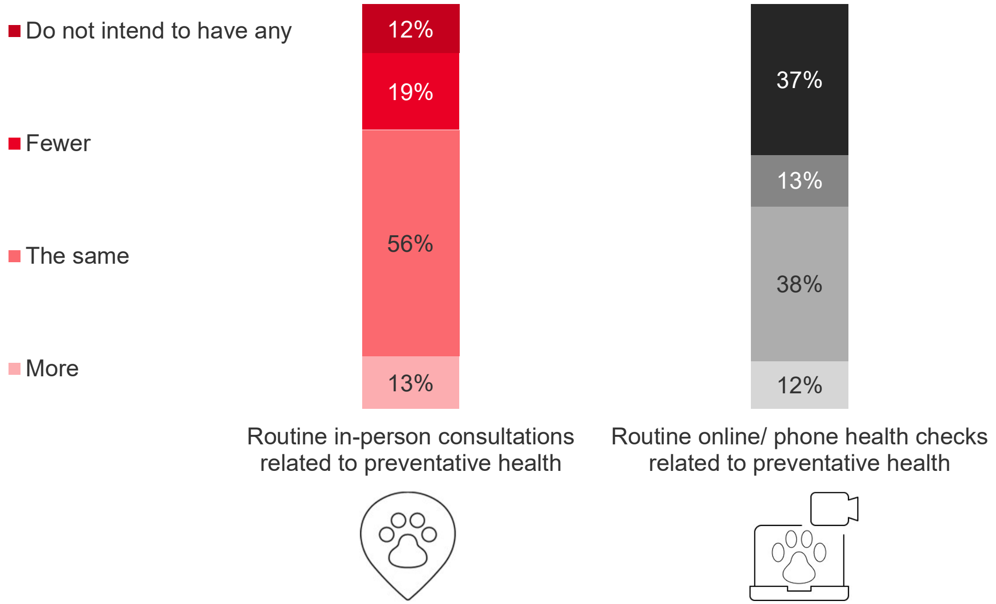
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500)
Q.NoVet1. Which of the following best describes why you have not had a veterinary consultation in the last 12 months for this cat/ dog aged ? - who have not had a Vet appointment in the past year (n = 221), out of which Dog owners (n = 75*), Cat owners (n = 146)
Q.Vet1. How often in the past 12 months only, if at all, have you had an appointment with the vet either in person or virtually (not including any visits for grooming) for this cat/ dog aged ? - Dog owners (n = 1,000) and Cat owners (n = 855)

Only 62% of respondents have had a preventative health Vet appointment in the past year with 10% having had these online, and in the next year 56% of respondents expect to have the same number of appointments

Types of Vet appointments had in the past 12 months



Number of each type of <u>preventative health appointment</u> expected to be had in the next 12 months



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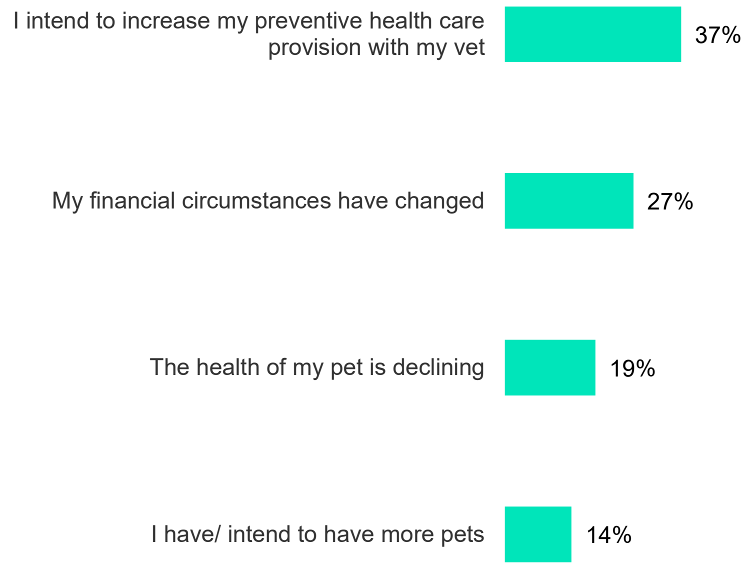
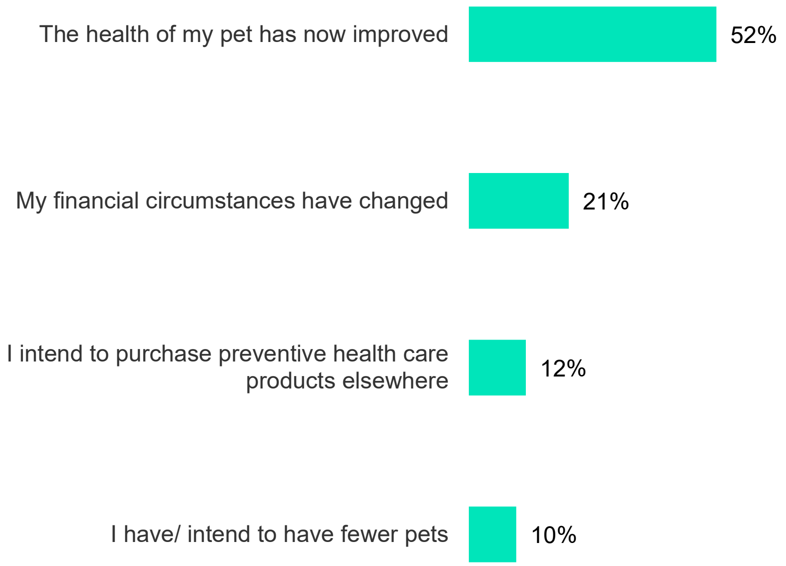
Base: Cat or Dog owners aged 16+ y.o. in the UK
Q.Vet2. Thinking about the last 12 months only, has this cat/ dog aged had… - who have had at least one Vet appointment in P12M (n = 1,279)
Q.Vet3. Thinking about the next 12 months, which of the following best applies to you in terms of the number of each type of preventative health appointment you will have for your cat/ dog aged ? (n = 1,500)

One third of respondents who expect to have more appointments in the next year intend to increase preventative health care for their pets; a fifth of these cite financial reasons for both increase and decrease in future number of appointments

Reasons for having <u>more</u> routine preventative health checks in the next 12 months



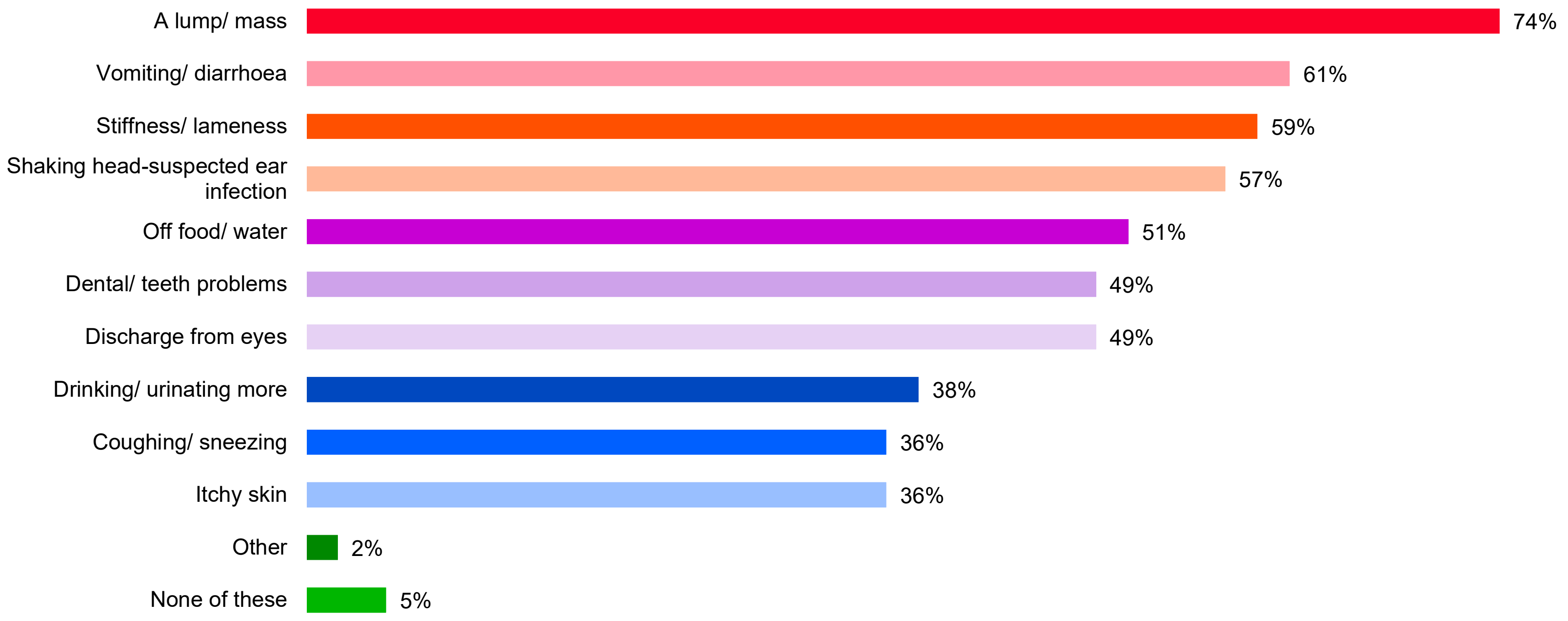
Reasons for having <u>fewer</u> routine preventative health checks in the next 12 months



Base: Cat or Dog owners aged 16+ y.o. in the UK
Q.Vet4A. You mentioned that you will have fewer routine preventative health checks for your cat/ dog aged in the next 12 months. Why is this? (n = 347)
Q.Vet4B. You mentioned that you will have more routine preventative health checks for your cat/ dog aged in the next 12 months. Why is this? (n = 290)

Respondents have rated the pet health issues that would make them book a Vet appointment immediately

Health issues that would make respondents book a Vet appointment immediately



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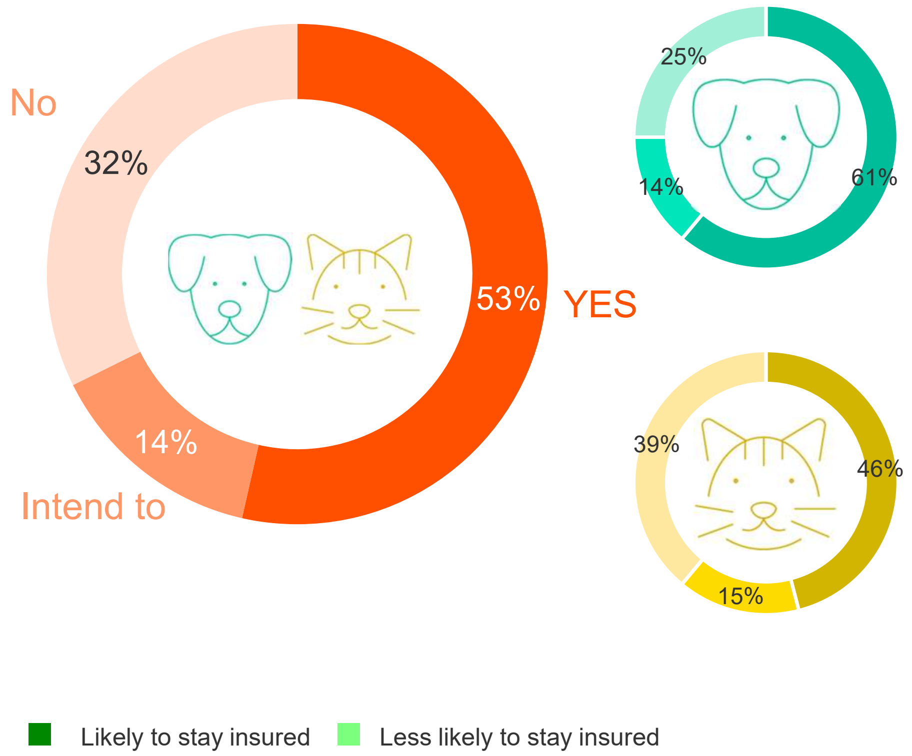
Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500)
Q.Vet5. Which of the following health issues would make you book an appointment at the vet immediately?

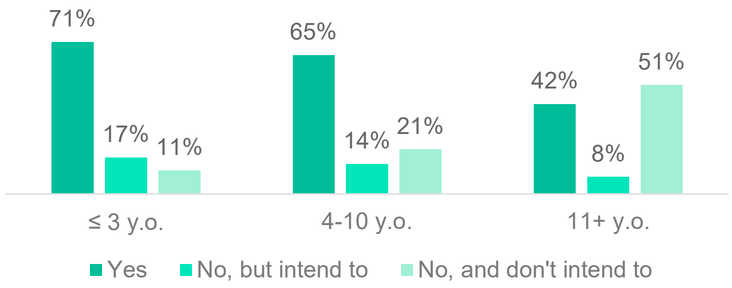
5
Pet healthcare and wellness – Pet insurance focus

About half of pet owners have pet insurance for their dog or cat, with dogs more likely to be insured than cats. Older pets are less likely to be insured

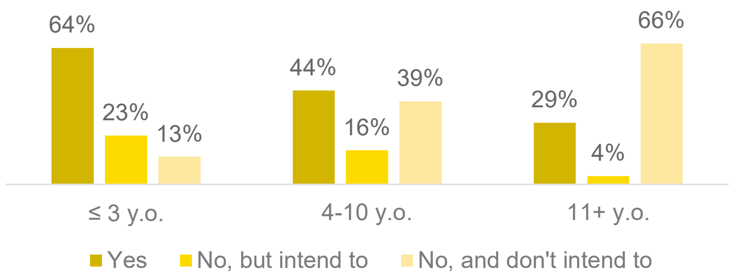
Pet insurance status



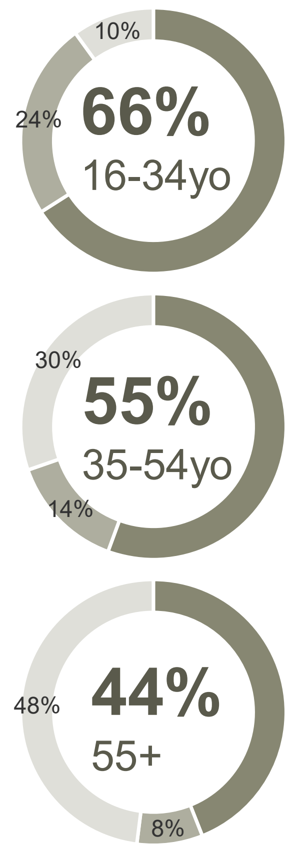
Age of dog



Age of cat



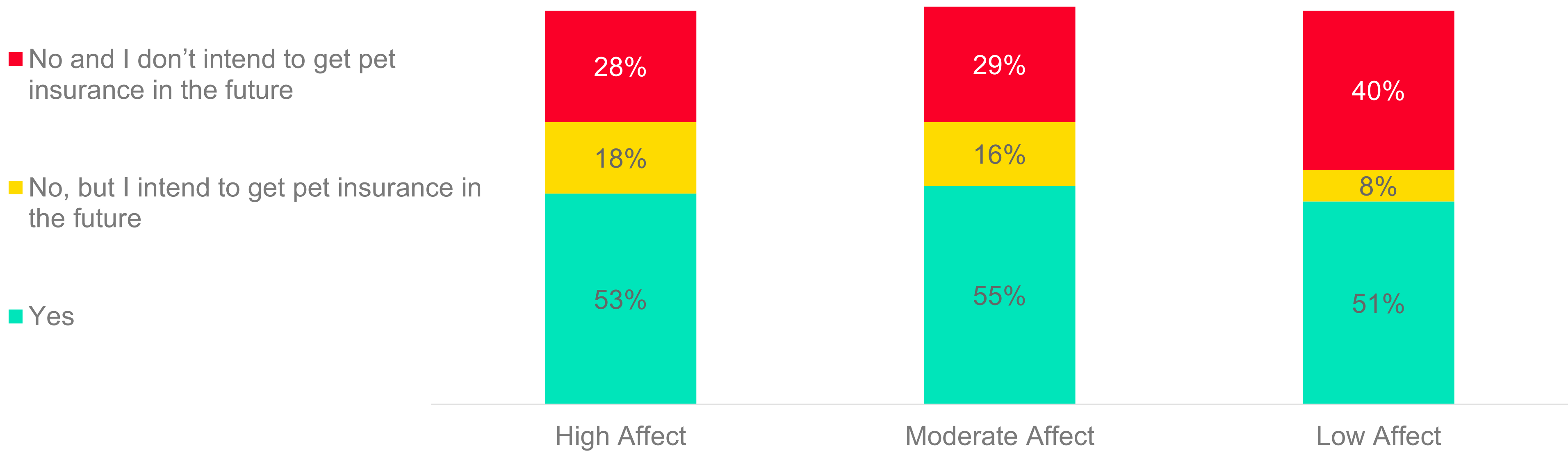
Age of pet owner



Q.Ins1. Do you have pet health insurance for this cat/ dog aged?
Base: Pet owners with joint/sole responsibility (n = 1,474) out of which Dog owners (n = 716) and Cat owners (n = 758), Dog up to 3 y.o. (n = 245), Dog 4-10 y.o. (n = 293), Dog 11+ y.o. (n = 289) , Cat up to 3 y.o. (n = 245), Cat 4-10 y.o. (n = 289), Cat 11+ y.o. (n = 224)

Although levels of insurance across cost-of-living crisis impact levels is consistent, those who see themselves as more affected have more of an intention to get insured if they have not done so already than those who see themselves as least affected

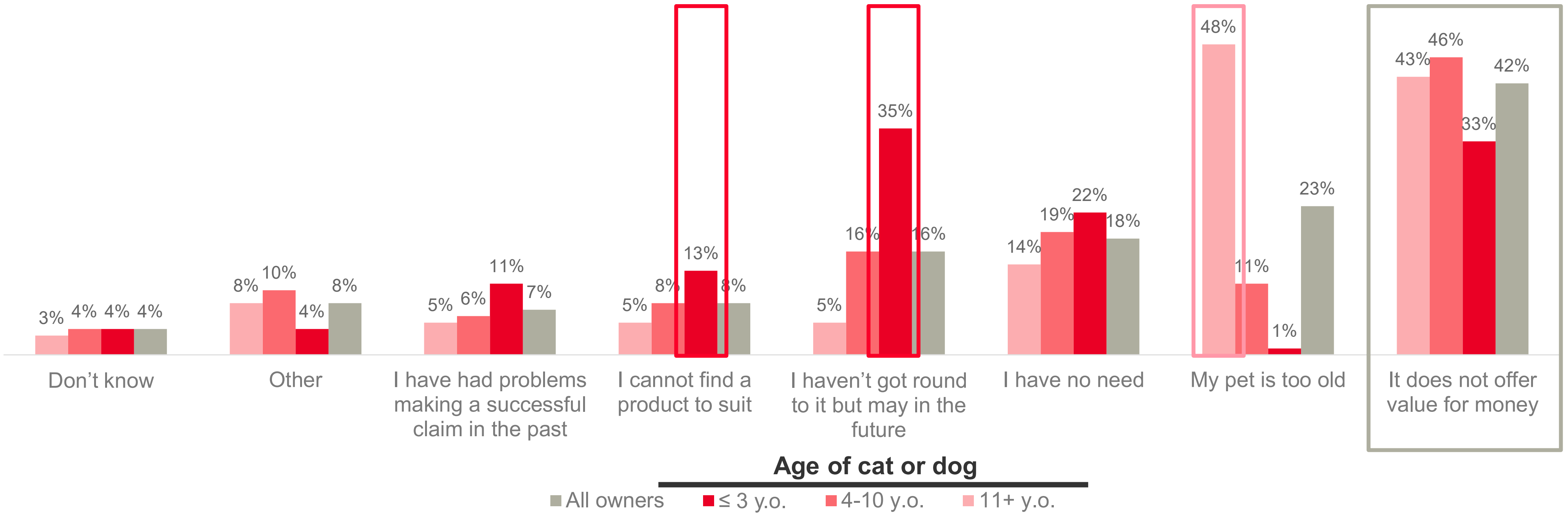
Pet insurance for dog or cat by level of cost-of-living impact



Q.Ins1. Do you have pet health insurance for this cat/ dog aged?
Base: Cat or Dog owners aged 16+ y.o. in the UK Low income (n = 559), Medium income (n = 592), High income (n = 313), High effect (n = 218), Moderate effect (n = 817), Low effect (n = 439)

Not offering value for money is the key barrier to people not taking out insurance for their cat or dog. There are differences between ages of pet: those with younger pets are more likely to still consider getting it but perhaps have not gotten around to it or have not found a suitable product, but those with older pets believe their pet is too old for insurance

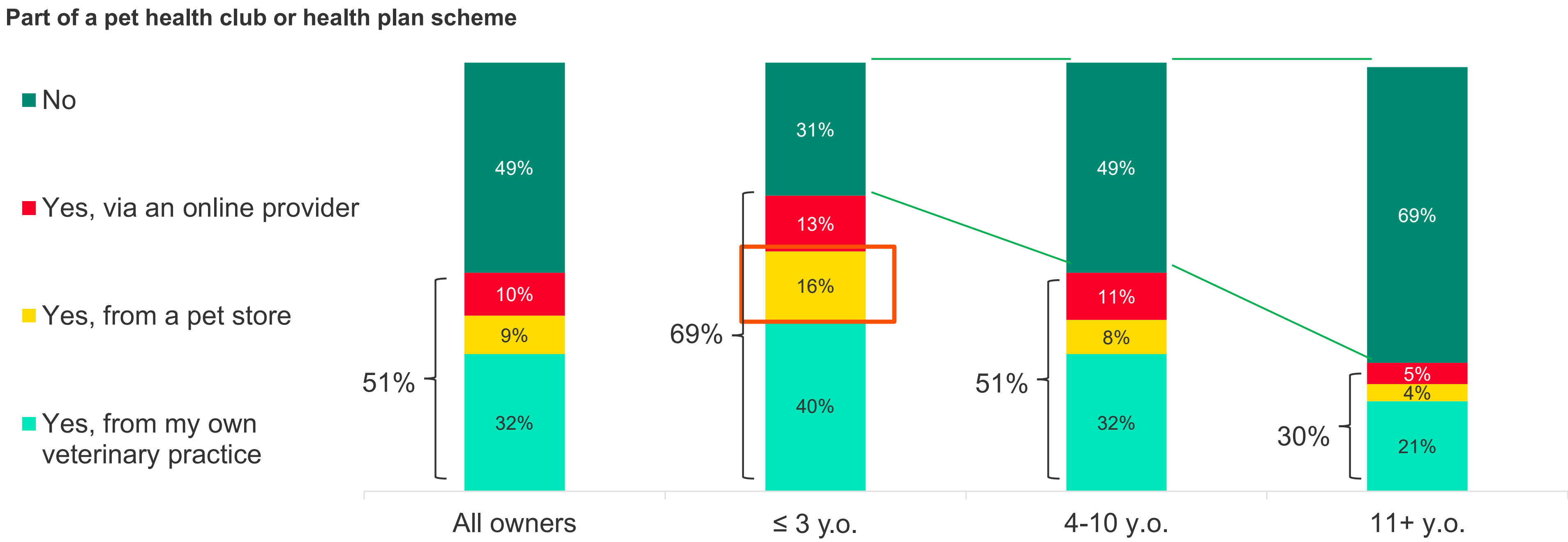
Reasons for not having taken out pet insurance



Q.SomeIns. Which of the following statements best describes why you've not taken out pet insurance for your cat/ dog aged?
Base: Cat or Dog owners aged 16+ y.o. in the UK without insurance fpr their cat or dog (n = 684) out of which cat or dog aged up to 3 y.o. (n = 159), 4-10 y.o. (n = 264), 11+ y.o. (n = 261)

6
Pet healthcare and wellness – Healthcare plans focus

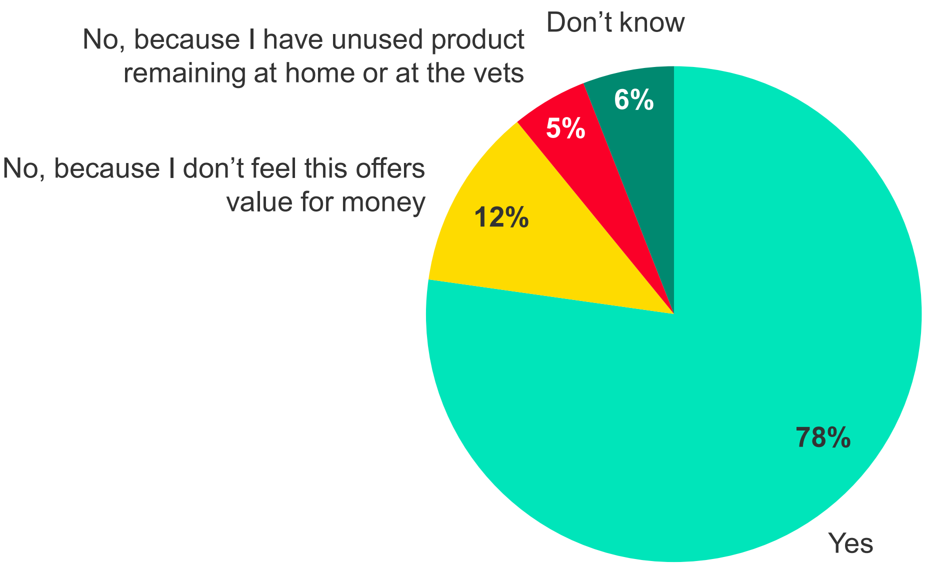
Around half of owners are part of a pet health club or health plan scheme which include the costs of routine vaccinations and parasite products, with significant differences by age of pet: around 7 in 10 for owners of pets aged ≤3 years hold memberships versus the inverse for the oldest pets. Most memberships are via their veterinary practice, although memberships via pet stores and online providers are more likely with younger pets



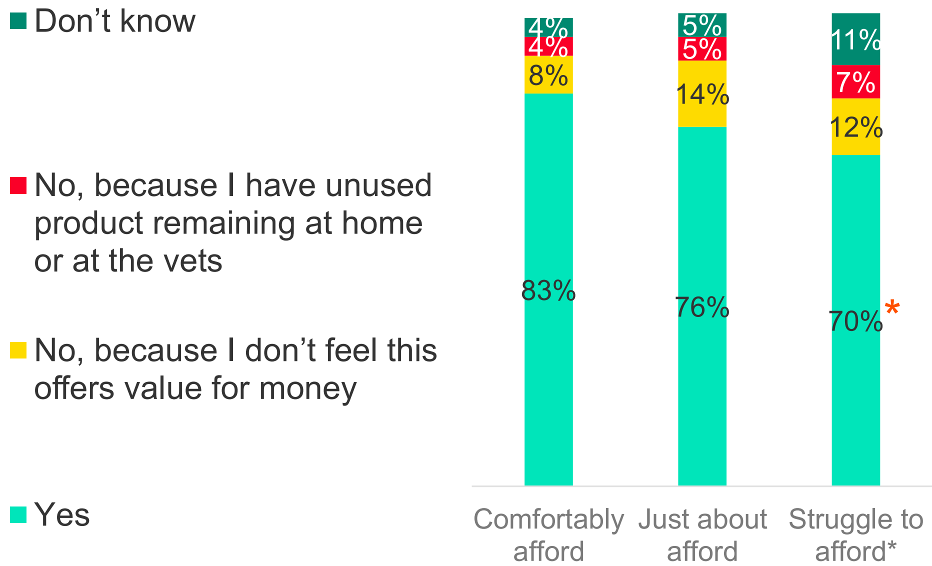
Base: Pet owners with joint/sole responsibility (n = 1474) out of which cat or dog aged up to 3 y.o. (n = 490), 4-10 y.o. (n = 582), 11+ y.o. (n = 402)
Q.SUB1 Are you part of a pet health club or health plan scheme which includes the costs of routine vaccinations/ flea/ worming treatment (paying monthly by direct debit) for your cat/ dog aged ?

Around 8 in 10 of pet health club members intend to continue the scheme next year. Offering value for money is important to member retention: this is a significant reason for cancelling membership, particularly amongst those where finances are a concern, amongst whom intention to continue membership is highest

Intend to continue the pet health club or scheme next year



Financial situation



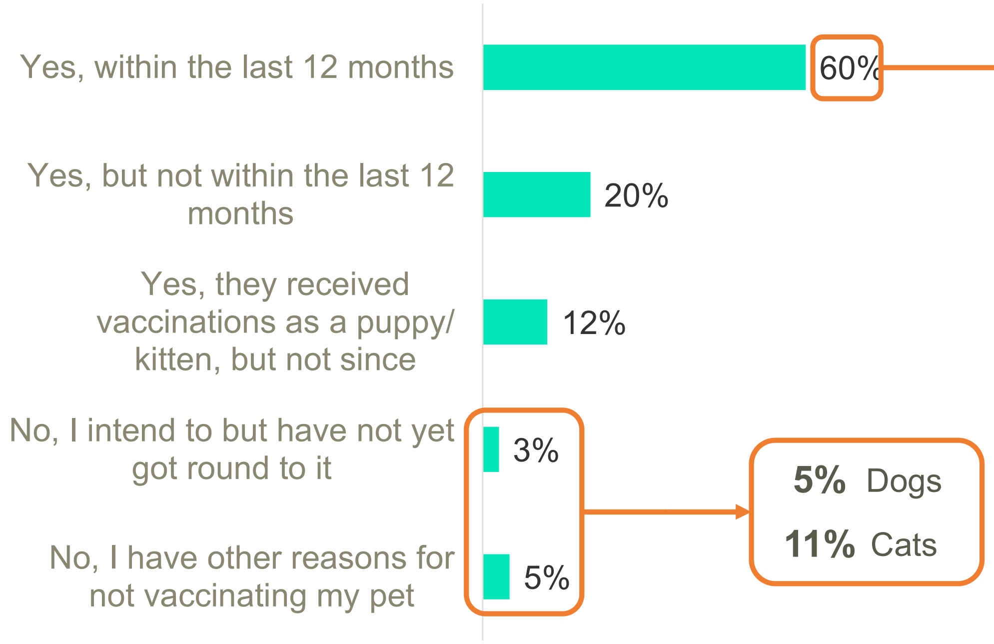
Q.CONTSUB. Do you intend to continue the pet health club or scheme next year?
Base: Cat or Dog owners aged 16+ y.o. in the UK who are part of a pet health club (n = 753) out of which Comfortably afford (n = 295), Just about afford (n = 369), Struggle to afford (n = 82*)
- Warning, small base size

* Denotes 95% statistical significance

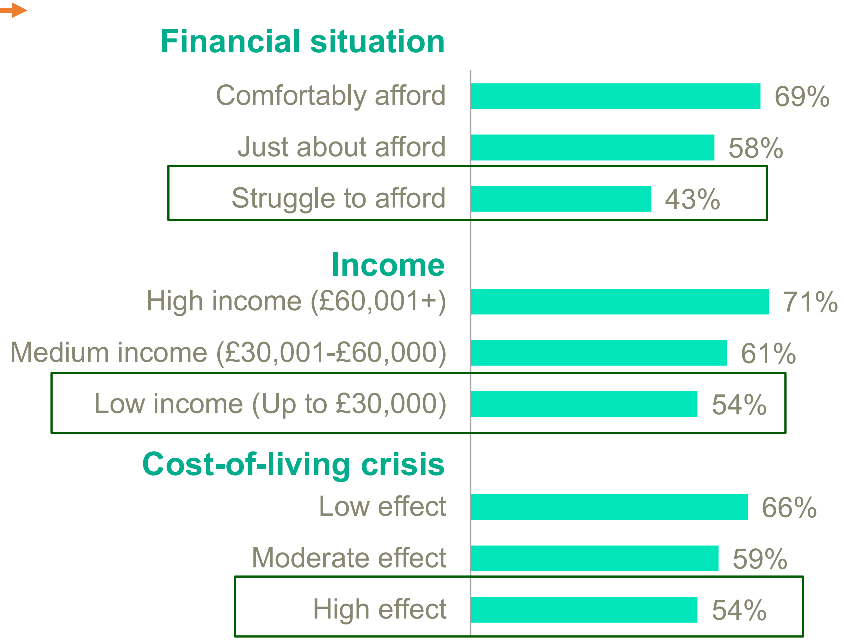
7
Pet healthcare and wellness – Vaccination focus

While most pet owners have had their dog or cat vaccinated, only 60% have had this done in the past 12 months. People's financial situation has a significant impact on vaccination in the past year, with lower incomes, those struggling most with the cost-of-living crisis and those who struggle to afford the things they want the least likely to have their pet vaccinated in the past 12 months. Cat owners are twice as likely as dog owners not to vaccinate

Pet vaccinations over the last 12 months



Financial situation of those who vaccinated in the past 12 months

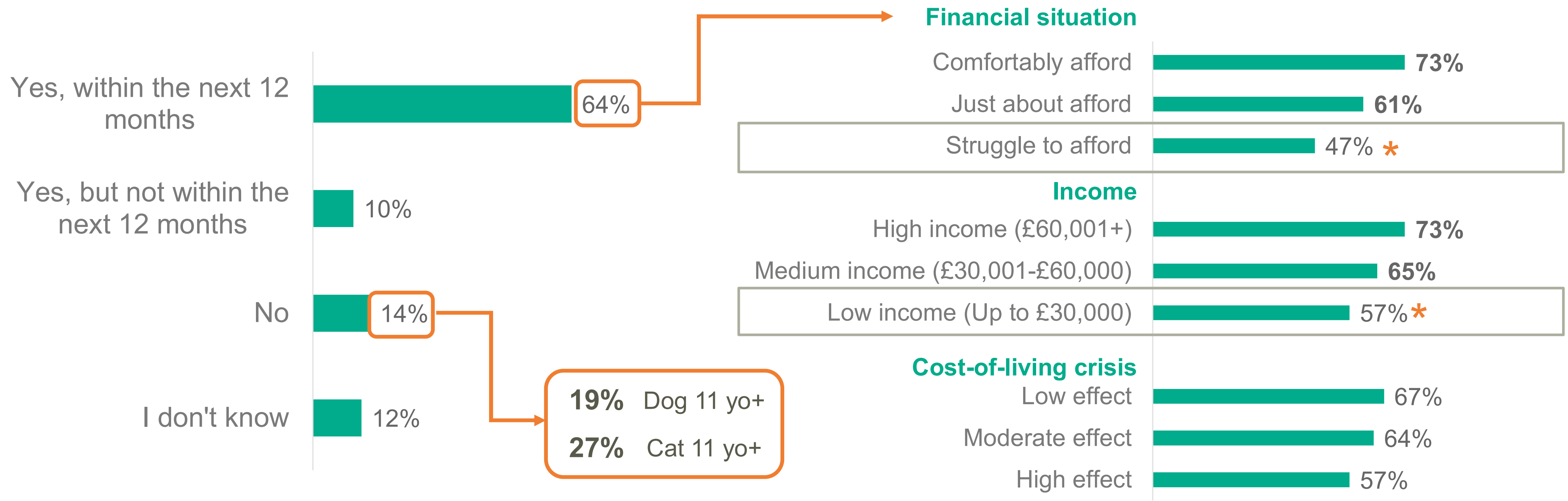


Base: Cat or Dog owners aged 16+ y.o. in the UK who are decision makers (n = 1,474)
Q.SUB2. How do you primarily receive your parasite products from your pet health club or health plan scheme?

Over half of pet owners intend to vaccinate their dog or cat within the next 12 months. As seen with vaccinations over the past 12 months, those who are struggling financially are significantly less likely to do so. Looking at pets whose owners do *not* intend to vaccinate, dogs and cats over 11 years old are significantly more likely not to be vaccinated than younger pets

Pet Owner's Intentions for Future Vaccinations

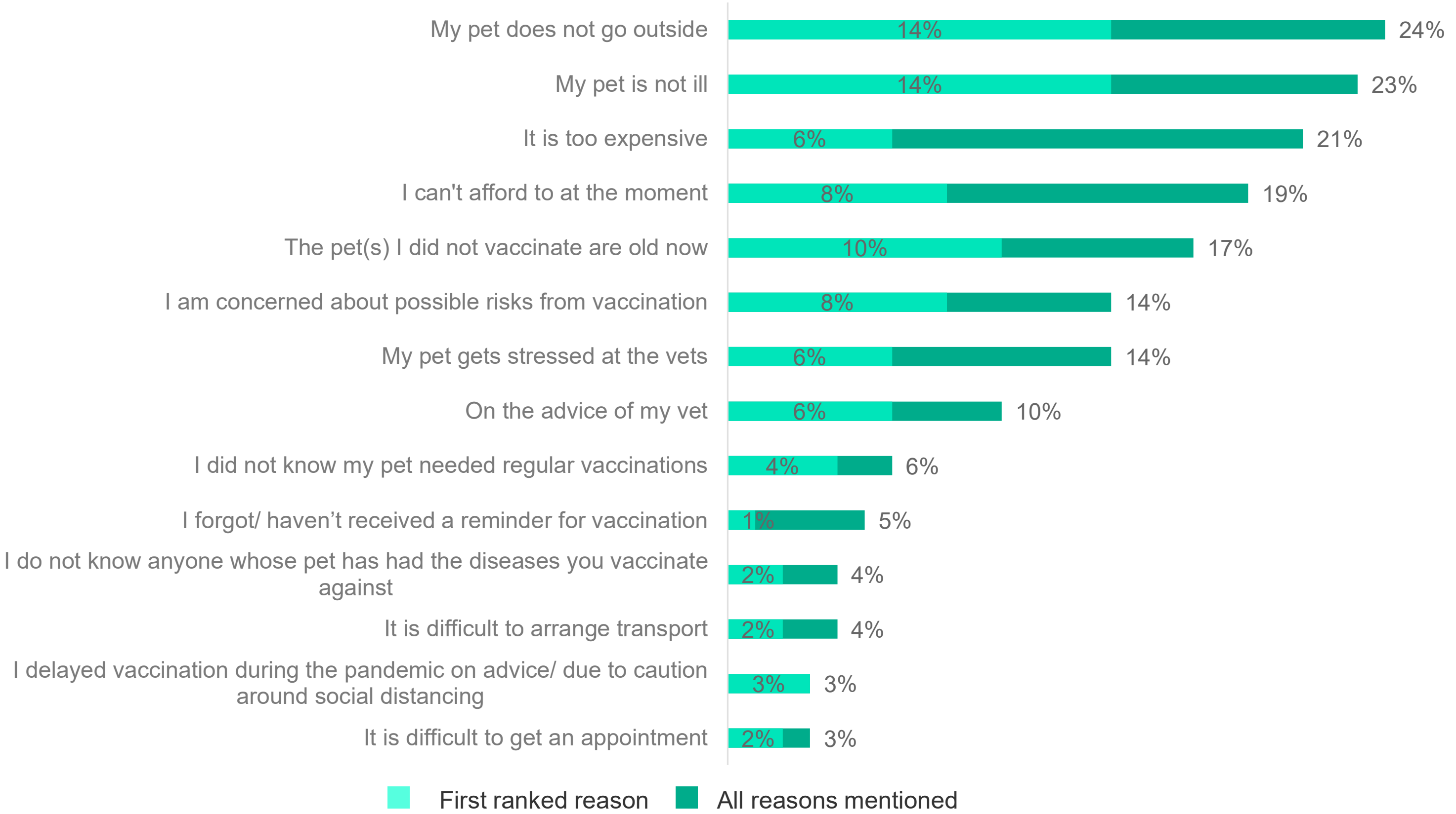
Financial situation of those who intend to vaccinate in the next 12 months



Base: pet owners with joint/sole responsibility (n=1,474)
Q.Vax_FUTURE Do you intend to have your aged vaccinated in the future?

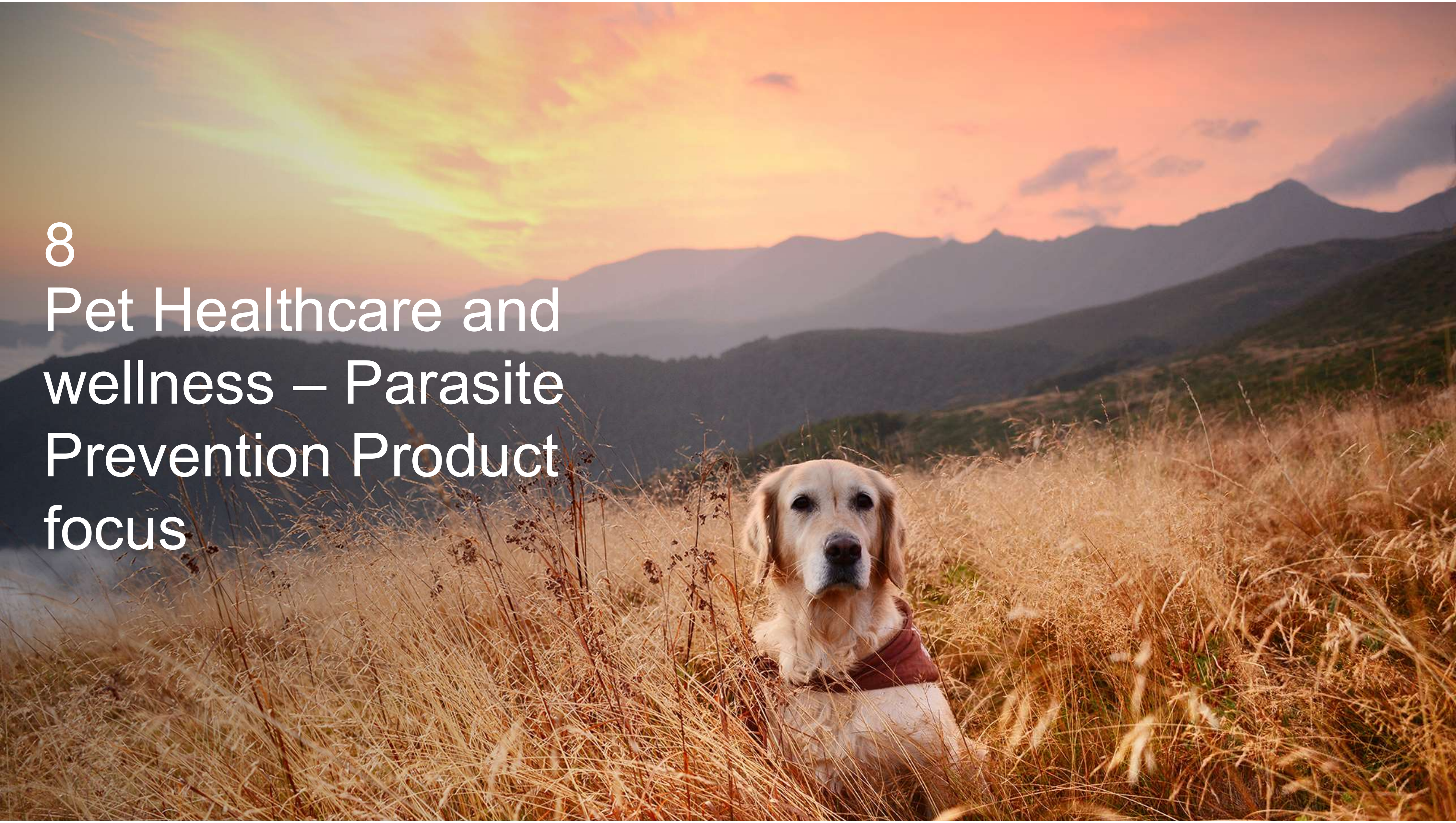
* Denotes 95% statistical significance

Around a quarter of those who have not had their cat or dog vaccinated say it is because it does not go outside, or because it is not ill, with these being the most commonly top ranked reasons. Cost and affordability are also key reasons stated, while age of pet ranks highly as a first ranked reason



Base: Pet owners who have not had their cat or dog vaccinated (n=118)
Q.NoVaxWhyAlls_1. Which, if any, of the following statements reflect your reasons for not vaccinating within the last 12 months?

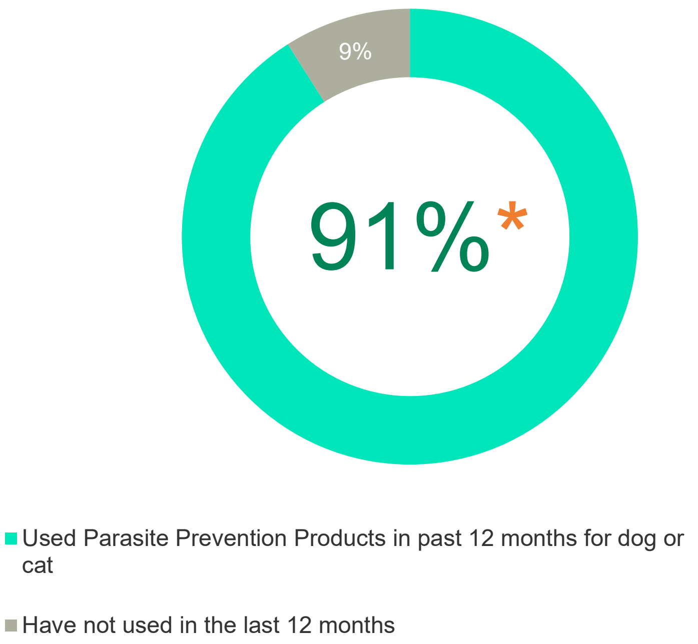
8
Pet Healthcare and wellness – Parasite Prevention Product focus



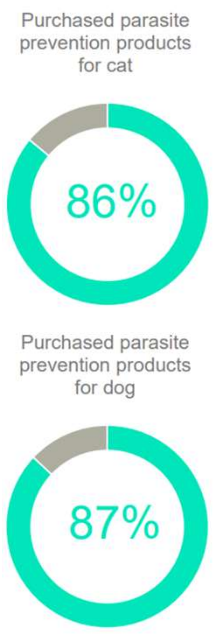
Pet owners see use of parasite prevention products a worthwhile investment: use in the past 12 months has increased from January, and is particularly strong amongst those most affected by the cost-of-living crisis

Parasite prevention products bought/used in past 12 months

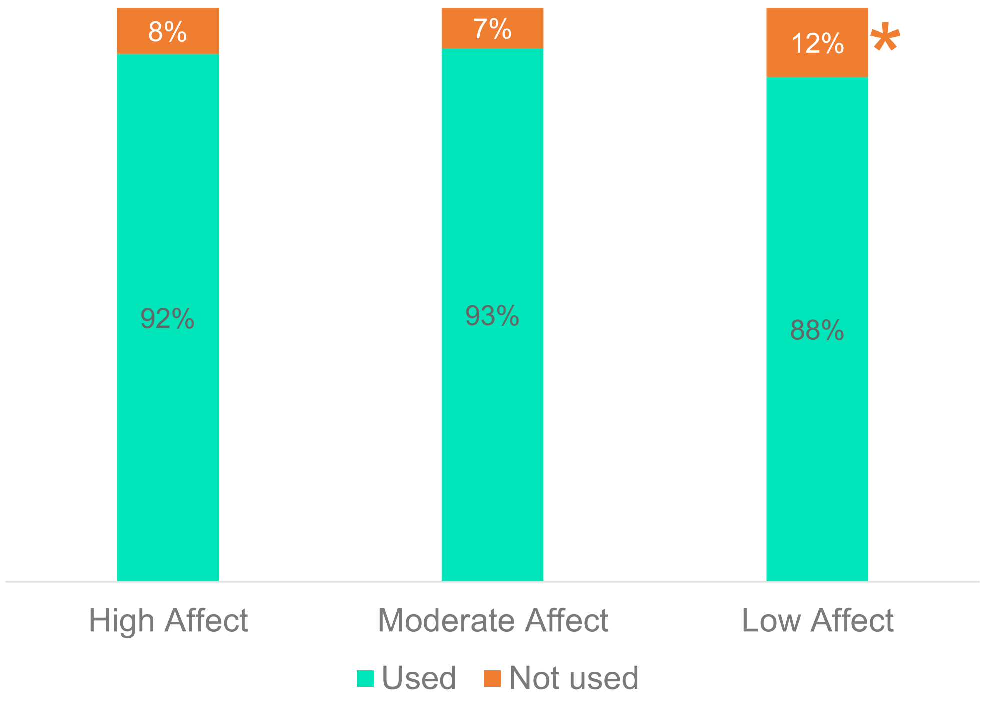
Used in p12m, Dec-22



Bought in p12m, Jan-22



Used in p12m, Dec-22, by degree of affect

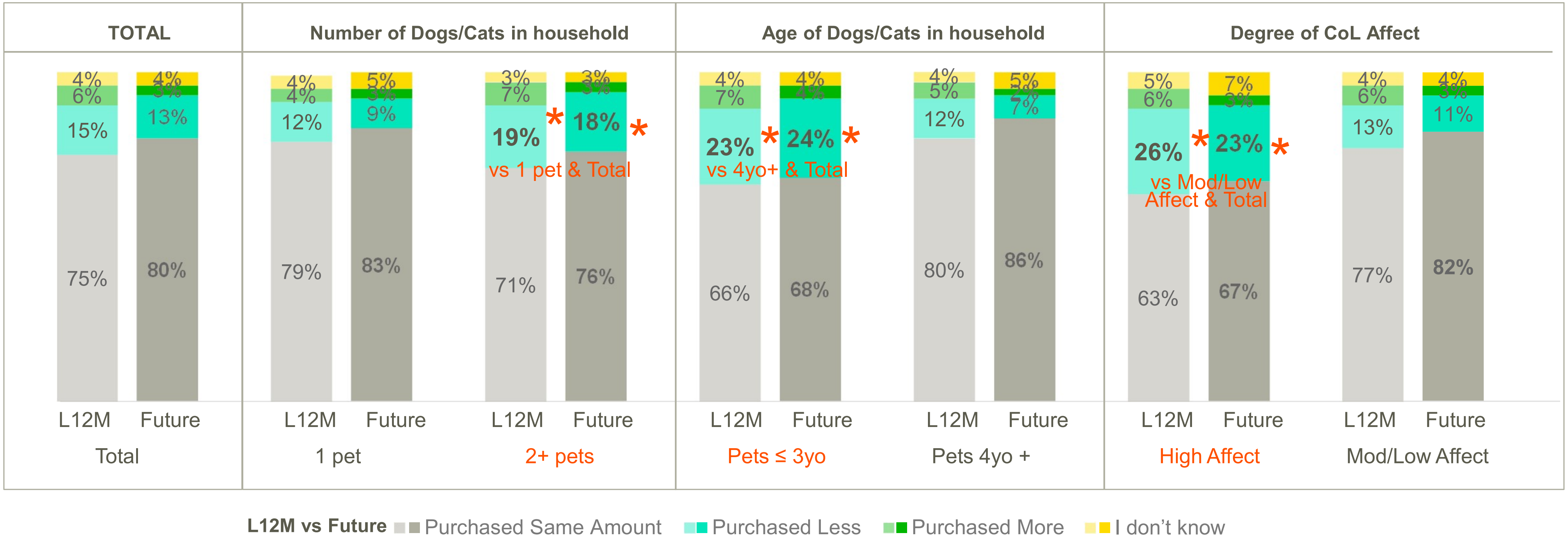


Q.Para1. Have you used products designed to prevent or treat for parasites for your aged in the last 12 months? Base: sole/joint responsibility for cat or dog (n=1474)

* Denotes 95% statistical significance

However, although the overall use has increased, the frequency of use varies. The majority of pet owners have not made changes to their parasite prevention purchasing over the past 12 months, households with more than 1 pet, with pets 3 years old or younger and those most highly affected by the cost-of-living crisis are more likely to have purchased less in the past and are more likely to do so in the future

Future vs L12M changes in purchasing of parasite prevention products for dog/cat

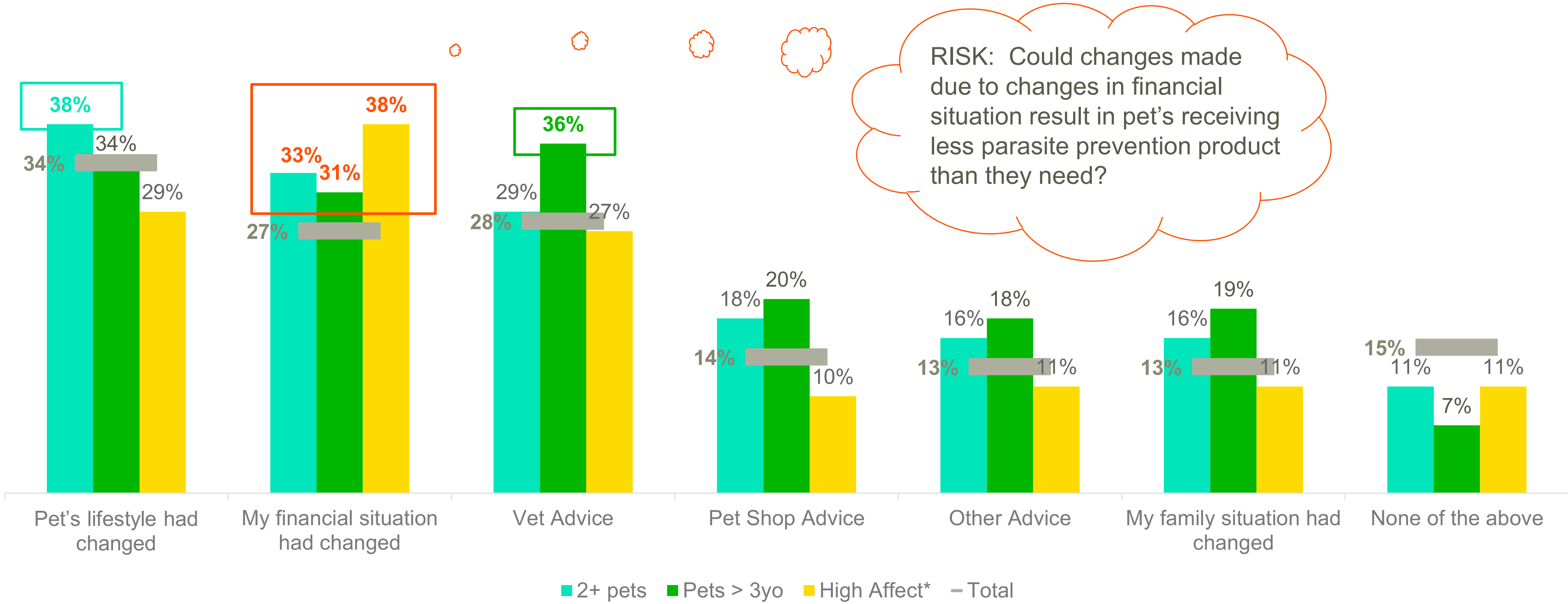


Q.ParaPa. To what extent has your purchasing of these products changed in the last 12 months for your cata/dog? Base: all who buy parasite prevention products (n=1340), 1 pet (n=717), 2+ pets (n=623), pet ≤ 3 yo (n=446), pet 4 yo + (n=894), high affect (n=199), moderate/low affect (n=1141)
Q.ParaFu. Now thinking ahead to the next 12 months, to what extent do you expect your purchasing of these products to change. Base all who buy parasite prevention products (n=1340), 1 pet (n=717), 2+ pets (n=623), pet ≤ 3 yo (n=446), pet 4 yo + (n=894), high affect (n=199), moderate/low affect (n=1141)

* Denotes 95% statistical significance

Changing frequency of purchase is often attributed to a change in the pet's lifestyle, particularly amongst owners of more than one pet. Changes in frequency of pets younger than 3 years are more often attributed to advice given by vet, pet shop, or other source. All sub-groups over index on 'financial situation has changed,' although the difference is not statistically significant

Reasons for changing frequency of L12M purchase of parasite prevention product

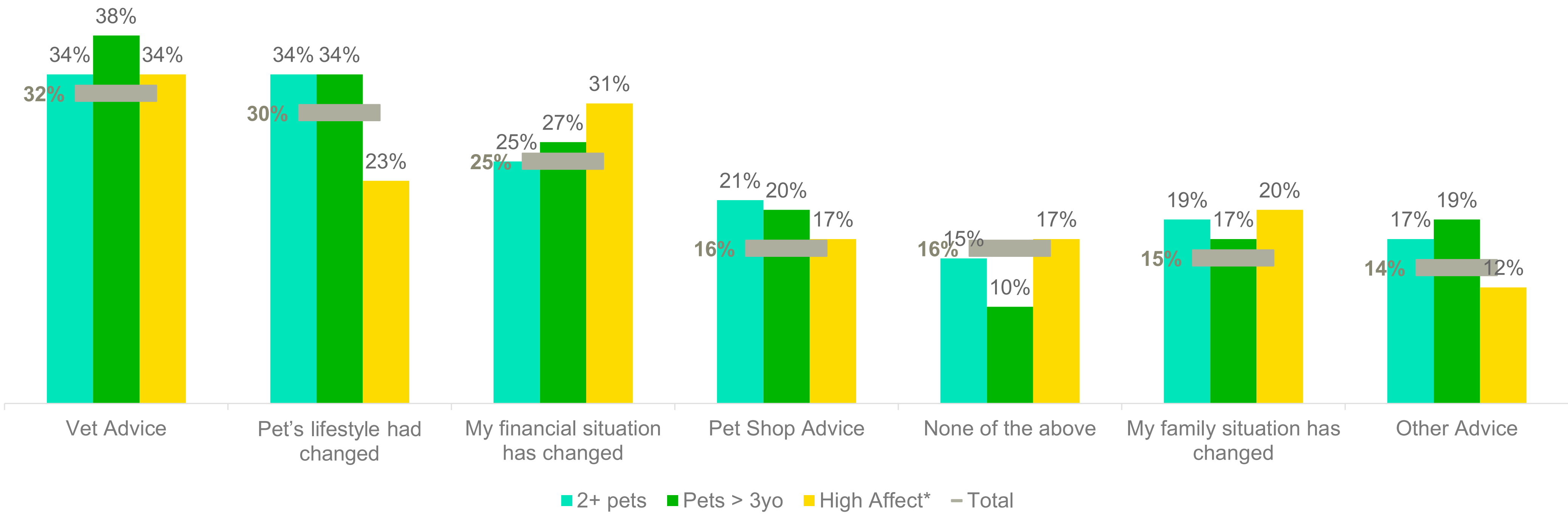


Q.ParaPay. You mentioned that your use of parasite prevention products has changed in the past 12 months. Why did this change? Base, those who made changes to purchasing (n=281), 2+ pets (n=160), pet ≤ 3 yo (n=134), High Affect* (n=63)
* Warning, low base size

* Denotes 95% statistical significance

Reasons for changing the frequency of purchase in the future are driven largely on vet advice or a change in the dog or cat's lifestyle. For those who are more highly affected by the cost-of-living crisis, the financial situation remains a strong driver

Reasons for changing frequency of future purchases of parasite prevention product

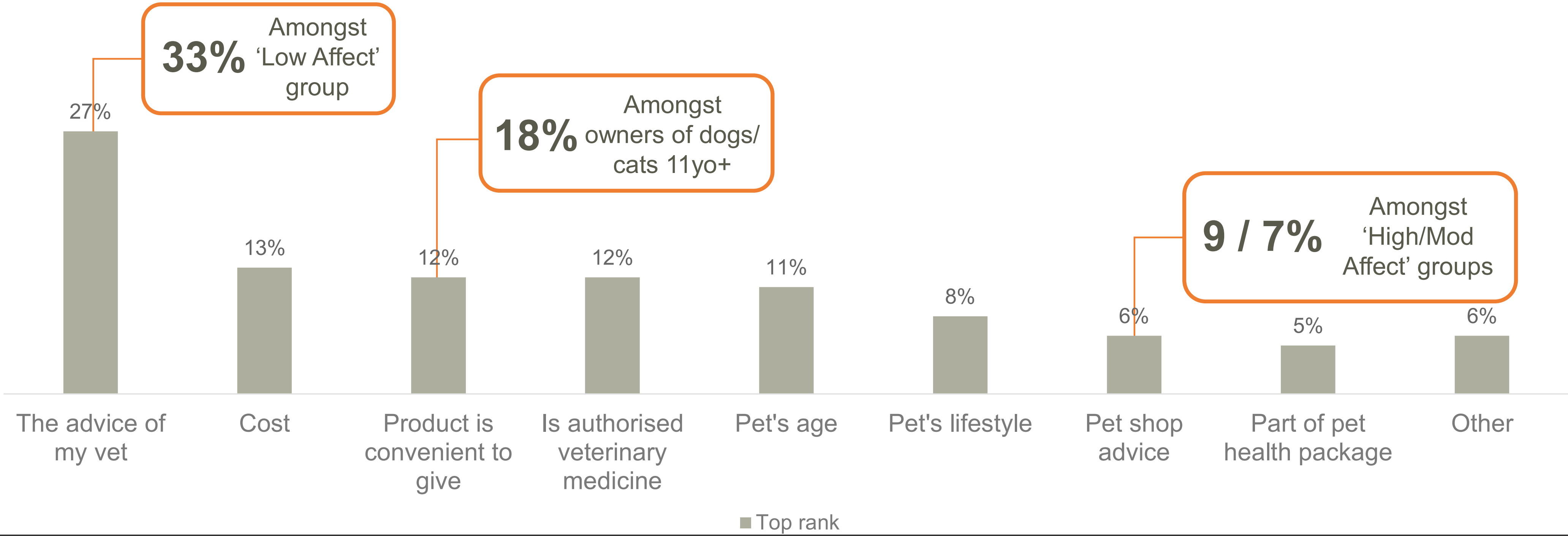


Q.ParaFuY You mentioned that your use of parasite prevention products will change in the next 12 months. Why do you think this might change? Base, those who intend to make changes to purchasing (n=267), 2+ pets (n=148), pet ≤ 3 yo (n=143), High Affect* (n=65)
Warning, low base size

* Denotes 95% statistical significance

Advice of a vet is the top ranked factor influencing the choice of parasite prevention product. This is particularly the case amongst those who are among the least affected by the cost-of-living crisis, whereas those who have been affected are more likely to also take advice from the pet shop

Influencing factors on choice of parasite prevention product, top rank

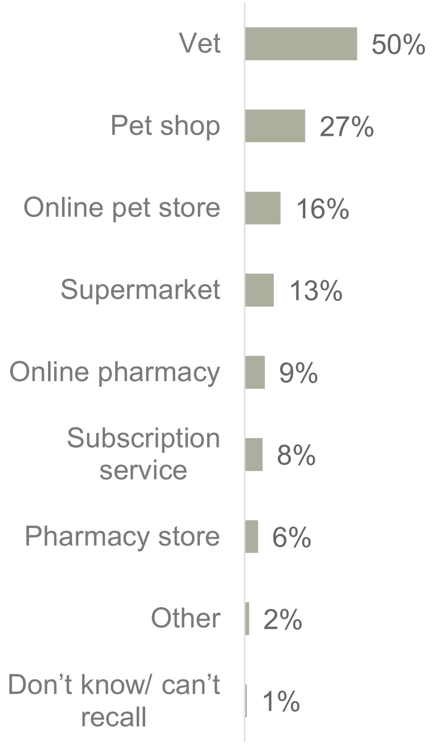


KANTAR | NOAH Supporting the future of animal health

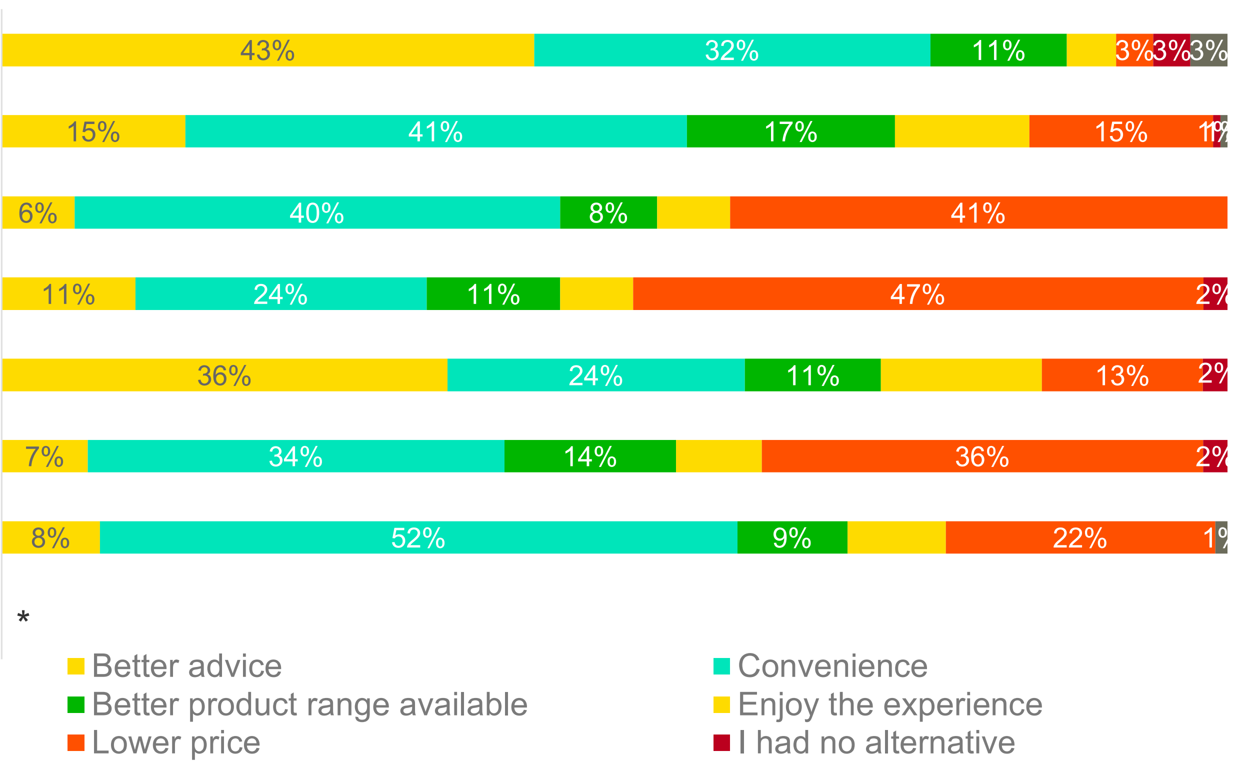
Q.ParaProd1s_1 Which of the following factors influences your choice of preventative products for your cat/dog?. Base: pet owners 16+ (n=1500)

Decisions about purchase of parasite prevention products is largely driven by convenience and quality advice. Pet owners find both at their vet, making it the most common place of purchase

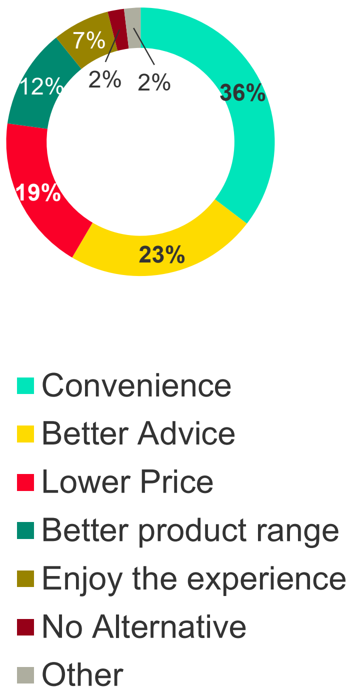
Parasite Prevention Product Place of Purchase



Reasons for Choosing Location



Summary of Reasons given



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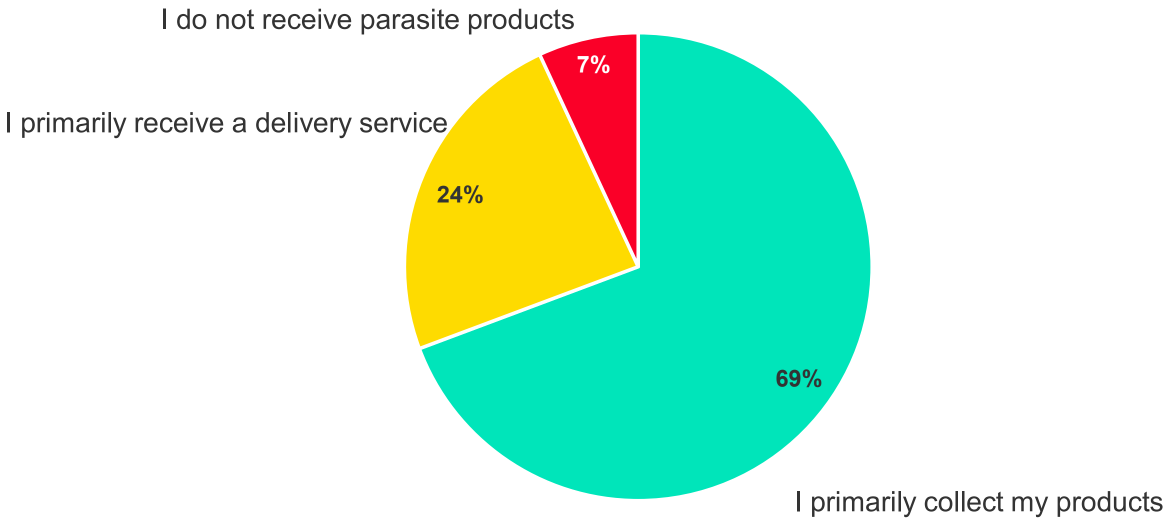
QParaBuy. Where did you get these parasite prevention products? Please select all that apply (n=1340)
QParaWhy. Why did you choose this location? Please select the answer that most closely reflects the main reason for choosing this location. Base: vet (n=669), pet shop (n=358), Online pet store (n=214), Supermarket (n=172), Online pharmacy (n=122), Subscription service (n=103), Pharmacy store (83), Other (n=29)

Around a quarter make use of a delivery service to receive parasite products from their pet health club, but most members collect the products in person. A small number say they do not get parasite products as part of the plan

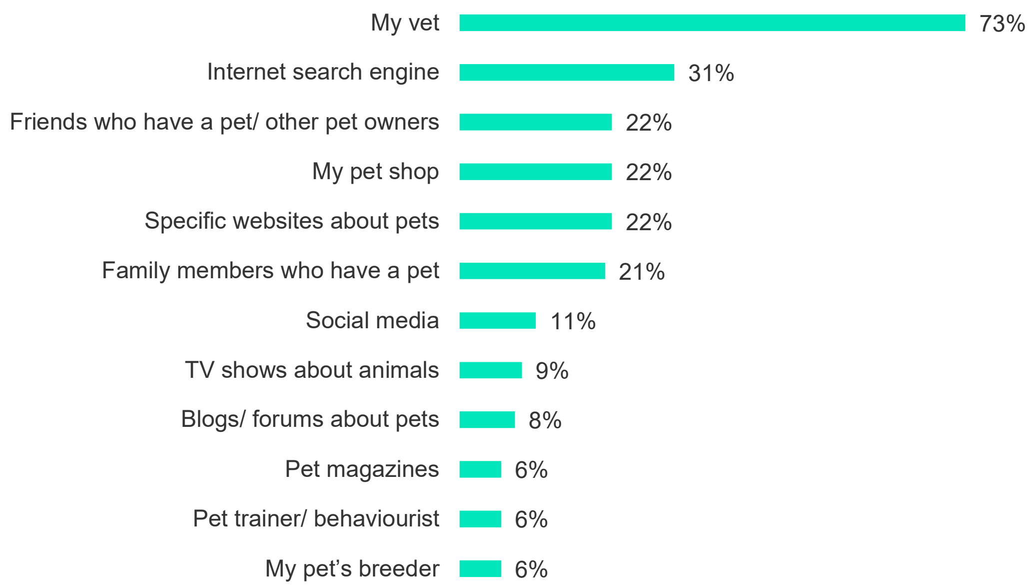
How receive parasite products from pet health club or health plan scheme



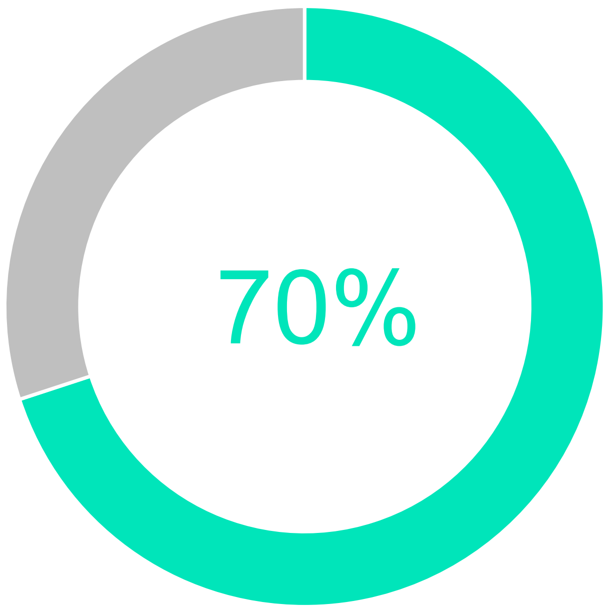
Base: Cat or Dog owners aged 16+ y.o. in the UK who are part of a pet health club (n = 753)
Q.SUB2. How do you primarily receive your parasite products from your pet health club or health plan scheme?

Most owners turn to Vets when they need information related to their pet's health, and this is also the source they trust most

Pet health sources of information used



Most trusted source:
My Vet

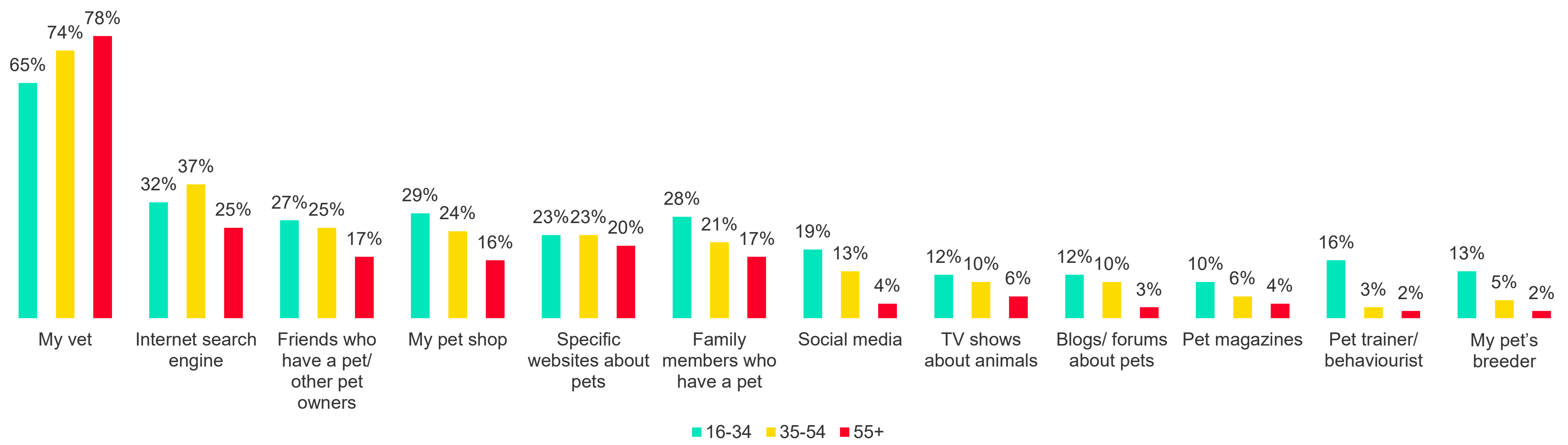


Vs. 6% - internet search engine

Base: Cat or Dog owners aged 16+ y.o. in the UK
Q.Info. Which of the following sources of information, if any, do you use when it comes to the health of your pet(s)? (n = 1,500)
Q.Trust. And which one do you trust the most when it comes to the health of your pet(s). (n = 1,424)

Vets are the main source of pet health information for owners, but online and social circle resources also play a role particularly for younger age owners

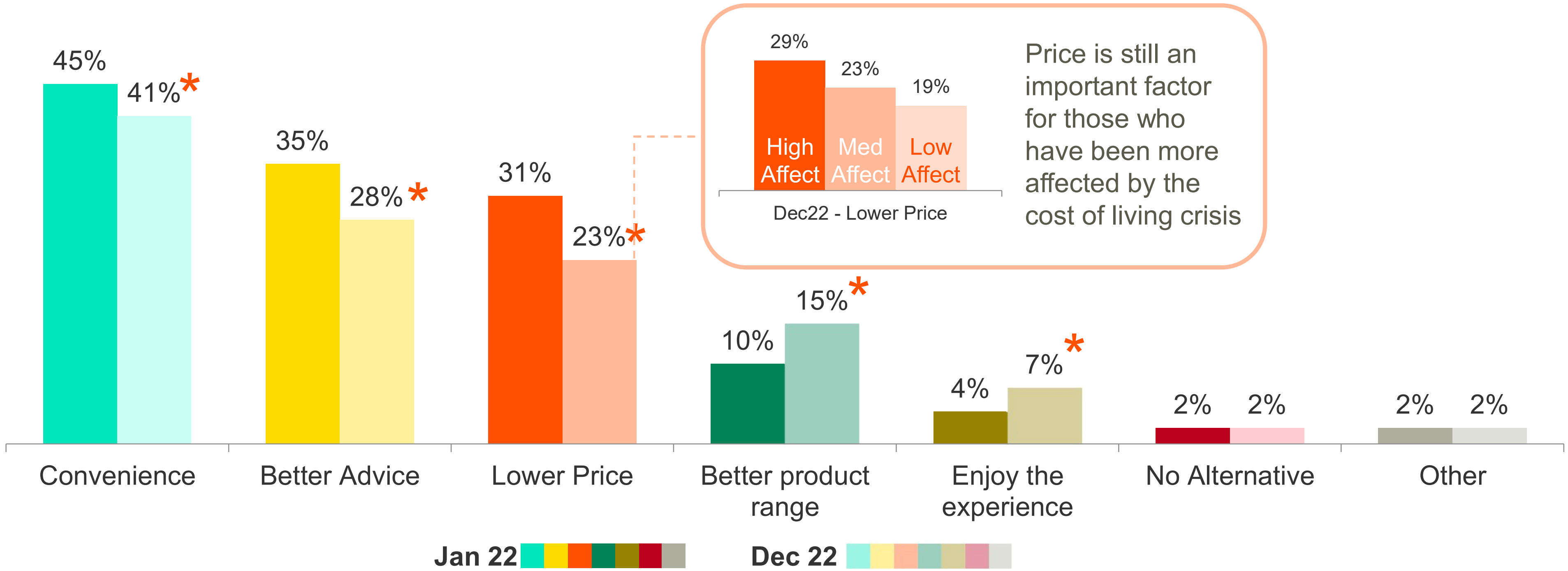
Pet health sources of information used by age of owner



Base: Cat or Dog owners aged 16+ y.o. in the UK (n = 1,500) out of which 16-34 y.o. (n = 405), 35-54 y.o. (n = 464), 55+ y.o. (n = 631)
Q.Info. Which of the following sources of information, if any, do you use when it comes to the health of your pet(s)?

Although 'convenience', 'price' and 'better advice' are still the biggest influencers to purchase location, these factors are less important to pet owners than they were in the start of the year. Pet owners are increasingly influenced by product range and the experience when purchasing their parasite prevention product

Reasons for choosing location of parasite prevention product

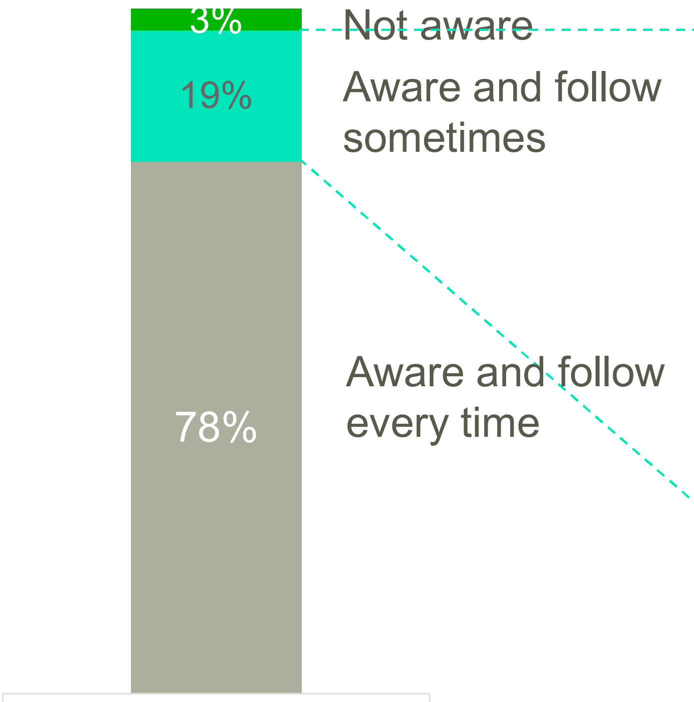


QParaWhy. Why did you choose this location? Please select the answer that most closely reflects the main reason for choosing this location. Base: total reasons given Jan 22 (n=1282), Dec 22 (n=1332)

* Denotes 95% statistical significance

The majority of pet owners are aware and adhere to usage instructions of parasite prevention products, and there is no meaningful difference in response between dog and cat owners. However, cat owners are significantly more likely to find their pet makes it difficult to apply the product.

Use of product advice



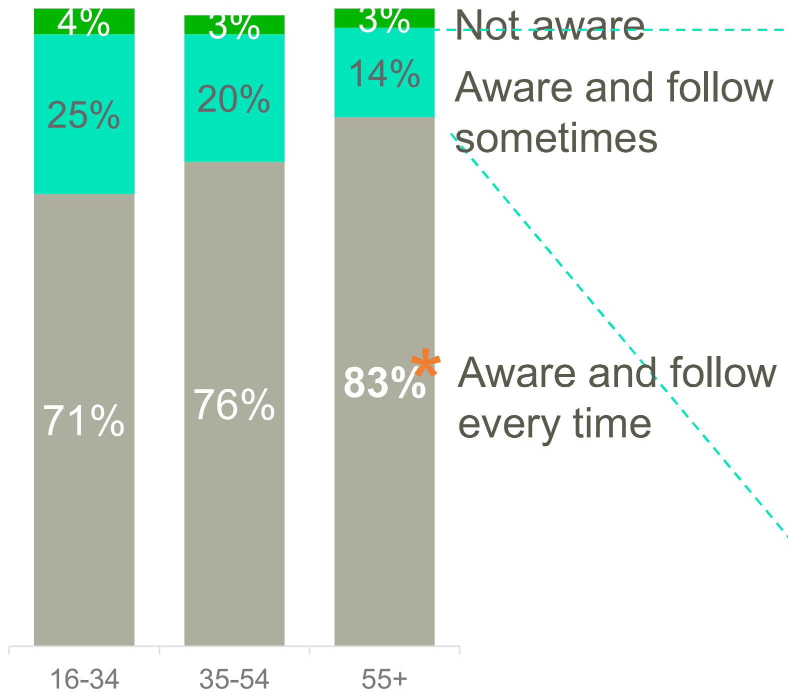
Reasons instructions are not always followed	Dog Owner	Cat Owner
My pet makes it difficult to apply the product	29%	49%*
The advice is difficult to read	21%	13%
I forget what my vet practice/ Suitably Qualified Person under the Veterinary Medicines Regulations has said	19%	13%
The advice is very complicated	18%	13%
It is difficult to stick to usage advice after applying a product because my pet insists on going into water	19%	10%
I do not know how to dispose of product/ packaging	17%	12%
It is difficult to stick to usage advice because my pet always needs to be bathed after a walk	17%	10%
It is difficult to stick to usage advice for another reason	4%	4%

Q.ParaLabel1 Products to treat parasites are sold with important information on how to use them, either on the label/ packaging or the vet will provide advice. Base: pet owners with joint/sole responsibility for pet (n=1474)
Q.ParaLabel2 So we can try to understand why you are not always able to stick to the advice/ information given to you when purchasing products to treat parasites, please select the reasons that best apply to you. Base: pet owners who don't always follow product instructions at QParaLabel1 (n=275)

* Denotes 95% statistical significance

The majority of pet owners are aware and adhere to usage instructions of parasite prevention products, and there is no meaningful difference in response between dog and cat owners. However, cat owners are significantly more likely to find their pet makes it difficult to apply the product.

Use of product advice



Reasons instructions are not always followed	16-34	35-54	55+
My pet makes it difficult to apply the product	38%	34%	45%
The advice is difficult to read	21%	20%	11%
I forget what my vet practice/ Suitably Qualified Person under the Veterinary Medicines Regulations has said	21%	16%	9%
The advice is very complicated	17%	15%	14%
It is difficult to stick to usage advice after applying a product because my pet insists on going into water	20%	12%	11%
I do not know how to dispose of product/ packaging	13%	20%	11%
It is difficult to stick to usage advice because my pet always needs to be bathed after a walk	17%	15%	8%
It is difficult to stick to usage advice for another reason	2%	2%	9%

Q.ParaLabel1 Products to treat parasites are sold with important information on how to use them, either on the label/ packaging or the vet will provide advice. Base: pet owners with joint/sole responsibility for pet (n=1474)
Q.ParaLabel2 So we can try to understand why you are not always able to stick to the advice/ information given to you when purchasing products to treat parasites, please select the reasons that best apply to you. Base: pet owners who don't always follow product instructions at QParaLabel1 (n=275), 16-34 (n=98*), 35-54 (n=92*), 55+ (n=85*)

* Denotes 95% statistical significance

Most pet owners understand the importance of preventing parasites. However, 16-34 year olds and residents of Greater London are significantly more likely to agree that not seeing the parasite means there is no need to treat it

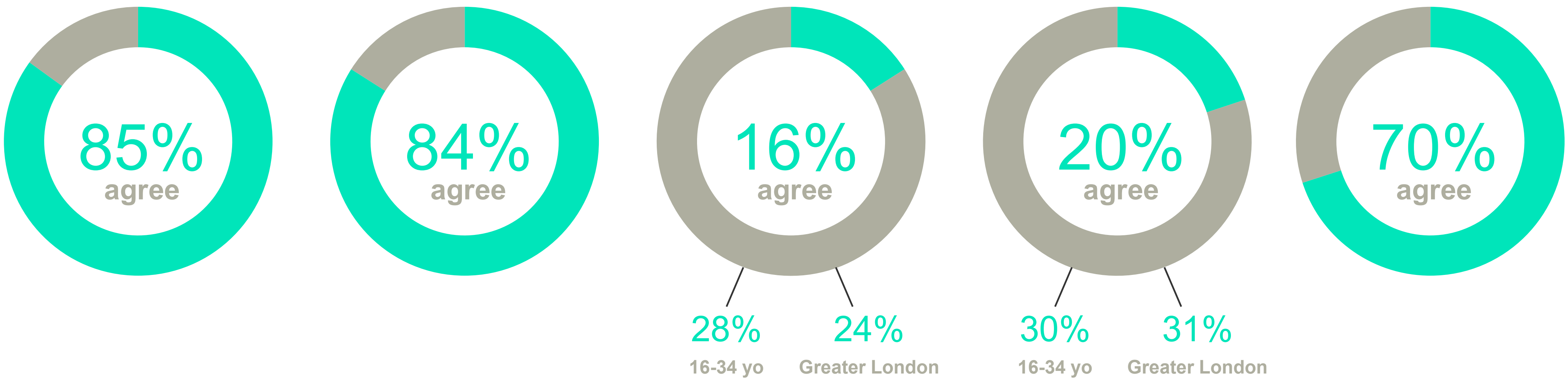
Preventing parasites such as worms, fleas and ticks is essential to protect my pet

Preventing parasites such as worms, fleas and ticks is essential to protect the health of my family

If I cannot see worms, there is no need to treat

If I cannot see evidence of fleas there is no need to treat

I regularly check for ticks on my pet



Q.PARAatt. To what extent do you agree or disagree with the following statements about parasites and the pets in your household? Base: Pet owners (n=1500)

9
Summary of findings

Key Findings

- Overall positive attitudes regarding pet ownership, but there are some groups who tend to struggle more:
  - Pet owners 16-34 y.o.
  - Those who describe themselves as having been highly affected by the cost-of-living crisis
  - Those who may have additional responsibilities like a member of their household having a vulnerable immune system
- Respondents who state that they struggle to look after their pets they are also agree with the statements that “My pet supports my mental health” & “I don’t know what I would do without my pet”
- Vet registration is high at 90% of sample, but is lower in Greater London and the South East
- Vet visits are important to respondents of all ages, but pet insurance and health plans tend to decrease in priority for older age respondents and pets
- Perceptions of offering value for money are key to insurance and health plan membership retention, particularly amongst those who are less financially comfortable
- Use and purchase of parasite prevention products is high, but is likely to decrease over the coming year amongst households with more than one pet, those with younger pets, and those most affected by the cost-of-living crisis
- There is a correlation between consistently following the direction on the labels and age of pet owner, with older respondents being significantly more likely to regularly adhere to the instructions than younger pet owners.

10 Methodology and sample

Methodology and sample

Methodology

- Methodology: online CAWI
- Length of interview: 10 minutes
- Sample universe: Cat or Dog owners aged 16+ y.o. in the UK
- Sample size: 1,500
- Dog owners (n = 1,000) and Cat owners (n = 855)
- Fieldwork period: 30 Nov – 13 Dec 2022
- Quotas: national representative on age, gender, region

Sample profile

- 98% of pet owners are solely or jointly responsible for the health and welfare of at least one pet in their household so "non-responsible" respondents were not analysed separately due to low base size (n=26 out of total 1,500 = 1.7%)
- In depth questions asked in relation to selected Cats and Dogs to cover all age groups: Dog owner (n=730), Cat owner (n=770), Dog ≤ 3 y.o. (n=248), Cat ≤ 3 y.o. (n= 246), Dog - 4-10 y.o. (n=300), Cat - 4-10 y.o. (n= 295), Dog - 11+ y.o. (n=182), Cat - 11+ y.o. (n=229)

Quota breakdown

Female: 50%
Male: 50%

16-34: 27%
35-54: 31%
55+: 42%

Greater London: 9%
South East: 23%
Scotland & N. Ireland: 11%
North: 26%
Midlands: 27%
Wales & West: 14%

Low income (30,000 GBP a year or below): 38%
Medium income (30,001 to 60,000 GBP a year): 40%
High income (60,001 per year and above): 21%

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