THE NEW ZEALAND
COMPANION ANIMAL
COUNCIL INC

Companion Animals in New Zealand 2016

Pet-n-Sur

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June 2016

Message from the Founding Patron of the NZCAC

By definition ‘companion animals’ embrace all species with whom we chose to share our lives and our homes.

In so doing these animals adjust to the demands we place on them to fit in with our chosen style of life, and this they do willingly, trusting that we will provide in return security, love and their essential needs.

This guardianship places on us the onerous task of undertaking the total responsibility for their well-being, and to successfully achieve this we need to be fully aware of their necessities in life.

In this, the second comprehensive study of ‘Companion Animals in New Zealand’ undertaken by the New Zealand Companion Animal Council, it is clear that in general terms New Zealanders do not dismiss their responsibilities illustrating a high duty of care, although it does indicate some areas in which we could improve our protection of them. We believe the information contained in this report will assist, not only in our understanding, but will also enhance our commitment to them.

In addition to all of this valuable information one simple fact emerges, that being that above all our companion animals deserve our absolute respect and affection.

Keep believing

Bob

BOB KERRIDGE

MNZM., KSTJ., JP., FNZIM., BAppAnTech

FOUNDER/PATRON, NEW ZEALAND COMPANION ANIMAL COUNCIL INC.

Message from the Chair of NZCAC

The NZCAC is committed to creating a better future for companion animals in New Zealand. This will only be achieved when, as a community, we have respect and compassion for companion animals as sentient beings along with a respect and understanding of the interface and relationship between companion animals, the environment and people. This is critical to us achieving our NZCAC vision of; *'A socially responsible nation for companion animals'*.

One of the goals of the NZCAC is to be a centre of excellence for research, knowledge sharing and advocacy for responsible companion animal guardianship. I trust that the Companion Animals in New Zealand 2016 report will go some way in giving a better understanding of the role and importance of companion animals in the lives of most New Zealanders.

BARRY HELEM

BBus, FFin, MInstD

CHAIR, NEW ZEALAND COMPANION ANIMAL COUNCIL INC.

Definition of 'Companion Animal'

A companion animal is any animal that shares a living environment and relationship with humans.

The term 'companion animal' is an all-encompassing phraseology given to an entire spectrum of animals with whom interaction and/or companionship is enjoyed by humans, and where a responsible guardianship is established and accepted for their welfare by humans. Where it is accepted that this degree of 'companionship' will vary by species, the expression 'companion animal' acknowledges the important role all such animals play in our society.

The NZCAC acknowledges and thanks Pet-n-Sur for its ongoing support and partial sponsorship of this report.

Note: Disclaimer

The results herein are indicative trends. The information is to be interpreted with caution as the data has not been subjected to rigorous statistical analysis.

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01 Introduction

1.1 REPORT CONTEXT

The New Zealand Companion Animal Council Inc. (NZCAC) has compiled *Companion Animals in New Zealand 2016* (this report) as an update to and expansion of its similarly named 2011 report.

It builds on the previous findings to gain a deeper understanding of the role and importance of companion animals in the lives of New Zealanders and how this is evolving over time.

New Zealand has an incredibly rich and vibrant history and culture, reflecting both its Māori and European heritage. It has a small, open economy, which operates on free market principles. It has a sizable manufacturing and a large services sector complementing a highly efficient export-oriented agricultural sector (The Treasury, 2015).

It is clear from the findings of this report that companion animals continue to play an integral and important role in the everyday lives of most New Zealanders.

1.2 METHODOLOGY

Galaxy Research was commissioned to undertake a survey of New Zealanders (*the New Zealand Companion Animal Survey*) about the care of their companion animals.

Galaxy Research conducted online research among a representative sample of adults aged 18 years and older. The total sample was 1,013 respondents. Quotas were used to ensure that these respondents were distributed throughout New Zealand in proportion to the population. Of the respondents, 1,013 were pet owners. Data collection commenced on Thursday 18 June, 2015 and was completed on Monday 22 June, 2015. Following the completion of interviewing, the data was weighted by region to reflect the latest Statistics New Zealand household estimates.

In addition to data from the *New Zealand Companion Animal Survey*, market research was analysed from Euromonitor International. This included data and analysis on total market size, market share and industry trends of pet care products in New Zealand.

1.3 EVOLVING TERMINOLOGY

The NZCAC believes it is important to acknowledge the evolving terminology used in relation to companion animals. These changes more appropriately reflect the relationship between people and companion animals and the role they play our lives.

The word ‘pet’ has been largely replaced by ‘companion animal’, with the former mostly only used to describe market segments such as ‘pet food’ and ‘pet care’.

In decades past, people have been referred to as the ‘owners’ of companion animals. This term infers possession and does not reflect the duty of care people have for the animals in their care. As such, the NZCAC fully supports the increasing usage of the term ‘guardian’ or ‘carer’. It is expected that the language around companion animals will continue to change and evolve.

1.4 DATA REPORTING

The following points regarding data should be noted:

- Throughout the report some figures have been rounded to the nearest decimal point. This may result in minor variations between sums of the component items and totals, and some percentages may not total 100%.
- Unless otherwise stated, expenditure figures are in New Zealand dollars.

The NZCAC acknowledges the contributions of all companies, industry associations and government agencies and thanks them for their support in providing information to compile this report.

02 Executive Summary

New Zealand is a nation of animal lovers. With well over 4.6 million companion animals in New Zealand, they outnumber people.

64% of New Zealand households are home to at least one companion animal, more than almost anywhere else in the world. Only the United States has a marginally higher percentage of households that are home to companion animals at 65%. Cats are the most popular companion animal in New Zealand, with 44% of households sharing their homes with at least one cat, followed by dogs at 28%.

Only 10% of households have fish; however, with an average of around nine fish per household the total number of fish is 1.5 million, outnumbering cats at 1.1 million. There are almost 700,000 dogs and over half a million birds.

New Zealand companion animal population breakdown, 2015

Companion animal type	Household penetration	Average number in home	Total (000)
Cats	44%	1.5	1,134
Dogs	28%	1.4	683
Fish	10%	8.9	1,510
Birds	7%	5.4	595
Rabbits	3%	2	116
Horses/ponies	2%	3.4	116
Other	5%	5.9	502
None	36%		
Total	64%		4,656

Fig 1

People are most likely to get a cat from the SPCA or an animal shelter (22%). This is followed by a friend (15%), adopting a found or stray cat (14%), a family member (13%), breeder (9%) or pet shop (9%).

The most significant difference for dogs is that 39% come from breeders. This is followed by the SPCA or an animal shelter (12%), a friend (12%), pet shop (9%) or a family member (8%).

From 2011 to 2015 desexing rates have increased 8% for cats from 86% to 93%; and 19% for dogs from 63% to 75%. The proportion of cats microchipped has more than doubled from 12% to 31%; and increased by nearly 50% for dogs from 48% to 71%. 79% of microchipped cats and 67% of microchipped dogs are on the NZCAR; and 91% of dogs are registered with their local council.

Another key trend is around pet insurance, which has roughly doubled in popularity in the past four years. One in ten (10%) cat

owners and nearly one in five dog owners (19%) now have insurance for their animals.

Companion animals play a vital role in the lives of New Zealanders. While companionship is the main reason for getting these animals, both cats and dogs become members of the family and trusted companions in 95% of households.

People with companion animals place great importance on their health and wellbeing, with total expenditure on products and services for companion animals estimated at $1.8 billion, up from $1.6 billion in 2011.

Over half (58%) of people who do not have companion animals would like to get one, which is around 347,000 households. The main barriers to this group having companion animals are their homes or lifestyle not being suitable (48%), the landlord or property where people live not allowing animals (34%), cost (32%), and responsibility (23%).

Vets are overwhelmingly considered as the best source of information for companion animal related issues, with 72% of people with companion animals having this view. Other trusted sources of information include the internet (51%), the SPCA (32%) and pet shops (31%).

Pet-n-Sur

03 Companion Animal Population

3.1 SUMMARY

New Zealand is home to more than 4.6 million companion animals. They outnumber people and more people share their homes with companion animals than almost anywhere else in the world.

Although the proportion of households with companion animals has declined moderately from 68% in 2011 to 64% in 2015, New Zealand has the second highest rate of households with companion animals in the world, second only to the United States at 65%.

The reason for this decline is a slight drop in the proportion of people sharing their homes with the most popular companion animals in New Zealand - cats, dogs and fish. In contrast there has been a slight increase in rates for birds, while the proportion of households with rabbits, horses or ponies and other animals has remained consistent.

The average number of animals per home mirrors these changes. There are slightly more birds, horses and ponies, rabbits and other types of pets per household. In contrast there is a very small drop in the average number of cats, dogs and fish per household.

New Zealand companion animal population breakdown, 2011 and 2015

Companion animal type	Household penetration		Average number in home		Total (000)	
	2011	2015	2011	2015	2011	2015
Birds	6%	7%	4.9	5.4	527	595
Cats	48%	44%	1.8	1.5	1,419	1,134
Dogs	29%	28%	1.5	1.4	700	683
Fish	11%	10%	9.1	8.9	1,678	1,510
Horses/ponies	2%	2%	3.2	3.4	87	116
Rabbits	3%	3%	1.7	2	88	116
Other	5%	5%	4.9	5.9	446	502
None	32%	36%	~	~	~	~
Total	68%	64%	~	~	4,945	4,656

Fig 2

3.2 DEMOGRAPHICS

Ownership rates are highest amongst people living in Christchurch (72%) and rural areas (78%), women (67%), those aged 34 - 49 (72%), Māori (68%) and European New Zealanders (67%), people working full time (71%) in households earning over $90k per year (72%), those in de-facto relationships or living together (77%) and families with children aged nine to 17 years (78%).

In contrast, ownership rates are lowest amongst people living in Wellington (59%) and suburban areas (62%), those over 50 years old (60%), those who identify as Asian (48%), with a university qualification (60%), not currently employed (53%), households earning less than $40k per annum (56%), people who are separated, widowed or divorced (57%), and those with no children (61%).

3.2.1 Geography

There is a significant variation in the popularity of companion animals across different geographic regions of New Zealand. Almost 80% of people living in rural areas have a companion animal. Surprisingly, the popularity of companion animals is lowest amongst people in suburban areas at 62%, with even city dwellers having a marginally higher rate of pet ownership at 63%.

As may be expected, the largest proportion of households with dogs are those in rural areas, with almost half (45%) having at least one dog. Ownership numbers for dogs are quite consistent for across city (27%), suburban (25%) and regional (25%) areas.

There is also variation in ownership between major cities. Christchurch has by far the highest proportion of households with companion animals at 72%, whereas Wellington is the lowest at 59%.

By far the highest rate of horse/pony ownership is in rural areas, where one in ten households have a at least one horse or pony.

Companion animal ownership demographics, 2015

	Location					Area			
	Auckland	Wellington	Other North Island	Christchurch	Other South Island	Urban – city	Suburban	Regional	Rural
Birds	6%	4%	8%	9%	6%	8%	5%	2%	12%
Cats	39%	40%	50%	45%	47%	43%	40%	52%	59%
Dogs	28%	25%	30%	31%	26%	27%	25%	25%	45%
Fish	13%	9%	9%	9%	7%	11%	9%	7%	11%
Horses/ponies	1%	1%	2%	4%	4%	1%	1%	1%	10%
Rabbits	4%	1%	3%	5%	4%	3%	3%	5%	5%
Other small mammals	1%	~	2%	1%	2%	2%	0%	0%	3%
Reptiles	1%	1%	2%	1%	2%	1%	1%	1%	2%
Other	2%	1%	3%	3%	4%	1%	2%	4%	10%
None	39%	41%	32%	28%	37%	37%	38%	34%	22%
Total	61%	59%	68%	72%	63%	63%	62%	66%	78%

Fig 3

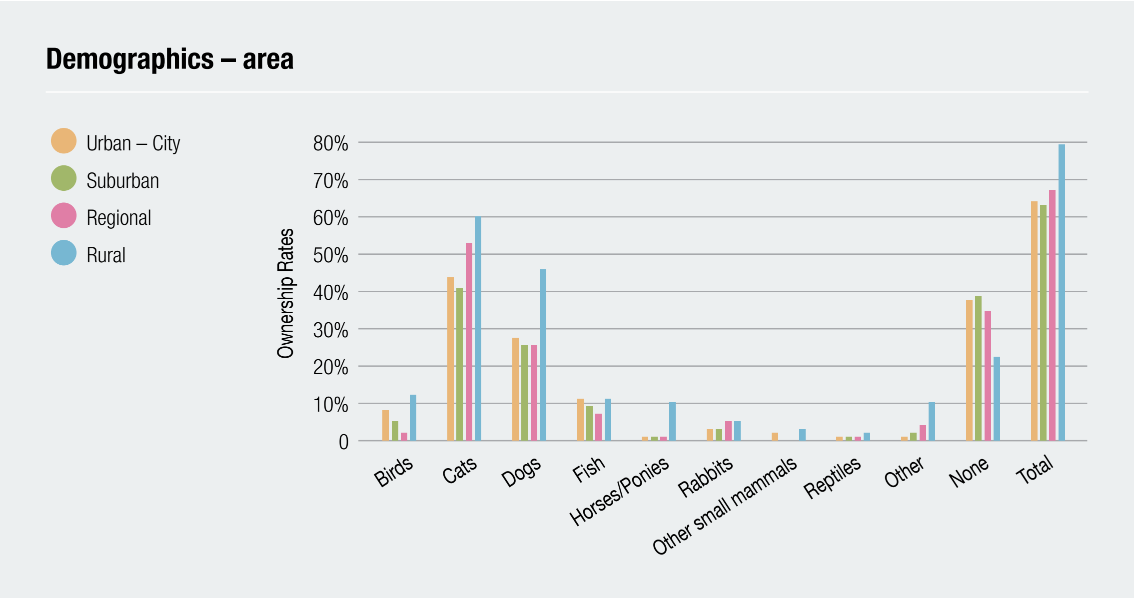

Fig 4

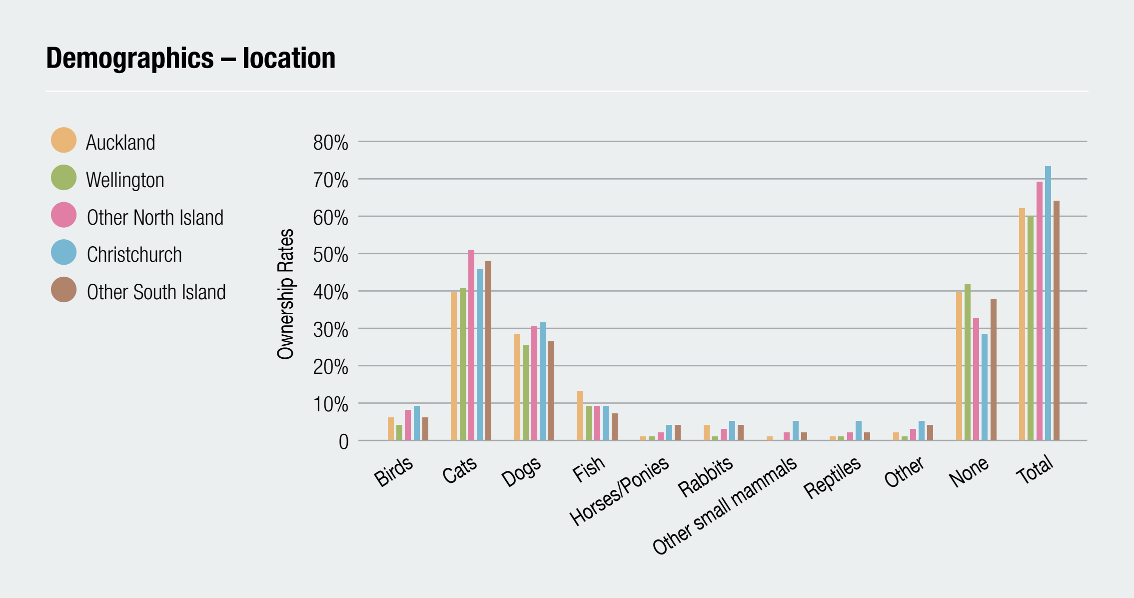

Fig 5

3.2.2 Gender and age

Women are more likely to have companion animals than men across all animal types except birds, which are more popular with men than women.

Those most likely to have companion animals are aged 34 to 49 years at 72%. People aged 50 years and over and those aged 18 to 24 years old are least likely to have companion animals at 60% and 62% respectively.

Companion animal ownership demographics, 2015

	Gender		Age			
	Male	Female	18-24	25-34	35-49	50+
Birds	8%	6%	7%	7%	8%	6%
Cats	41%	48%	45%	39%	52%	42%
Dogs	27%	29%	32%	35%	29%	24%
Fish	9%	11%	13%	11%	14%	6%
Horses/ponies	2%	2%	5%	1%	2%	1%
Rabbits	3%	4%	6%	4%	6%	1%
Other small mammals	2%	1%	4%	2%	2%	0%
Reptiles	1%	1%	2%	1%	2%	1%
Other	2%	4%	3%	2%	3%	3%
None	38%	33%	38%	34%	28%	40%
Total	62%	67%	62%	66%	72%	60%

Fig 6

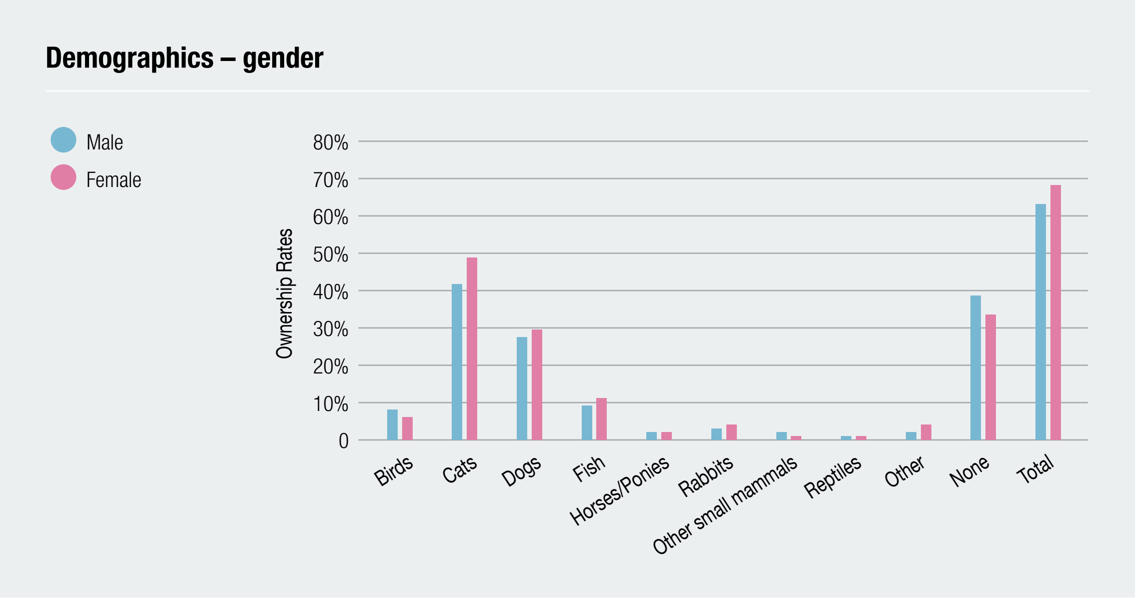

Fig 7

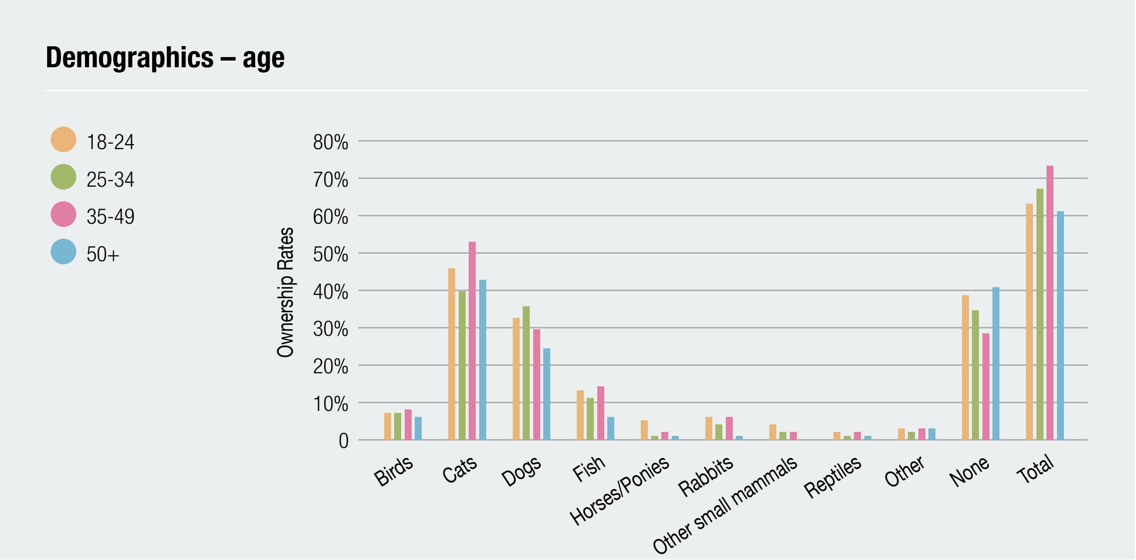

Fig 8

3.2.3 Ethnic groups

The biggest variation in ownership rates is amongst people of different ethnic backgrounds. Māori (68%) and European New Zealanders (67%) are far more likely to have companion animals than those of Asian (48%) or Pacific Island (55%) heritage.

Half of all Māori households have cats, closely followed by European New Zealanders at 48%. Māori households are also most likely to have dogs and birds with ownership rates at 35% and 10% respectively, well above the New Zealand average (28% and 7%).

Compared to 2011, cats are relatively less popular with European households and relatively more popular with Māori households. In 2011 45% of Māori households had at least one cat; this has increased by five percentage points to 50%, a change of 11%. In contrast in 2011 53% of European households had cats; in 2015 this has dropped by five percentage points to 48%, a change of 9%.

Dogs remain most popular with Māori households with ownership rates increased from 33% to 35% from 2011 to 2015. The percentage of European households with dogs has remained consistent with the 2011 figures at 29%.

The biggest difference in ownership rates across all demographics and animal types is for households with cats. Just 22% of households with Asian heritage have cats, compared to half of all Māori households. However, fish are most popular amongst households with Asian heritage, with 17% of all households having fish. Ownership rates of birds were also relatively high (9%)

Companion animal ownership demographics, 2015

	Ethnic group				
	NZ European	Māori	Asian	Pacific Island	Other
Birds	6%	10%	9%	2%	3%
Cats	48%	50%	22%	35%	43%
Dogs	29%	35%	24%	25%	32%
Fish	9%	15%	17%	12%	6%
Horses/ponies	2%	5%	1%	2%	6%
Rabbits	3%	7%	7%	5%	6%
Other small mammals	1%	5%	3%	2%	0%
Reptiles	1%	4%	3%	3%	3%
Other	3%	4%	1%	0%	3%
None	33%	32%	52%	45%	34%
Total	67%	68%	48%	55%	66%

Fig 9

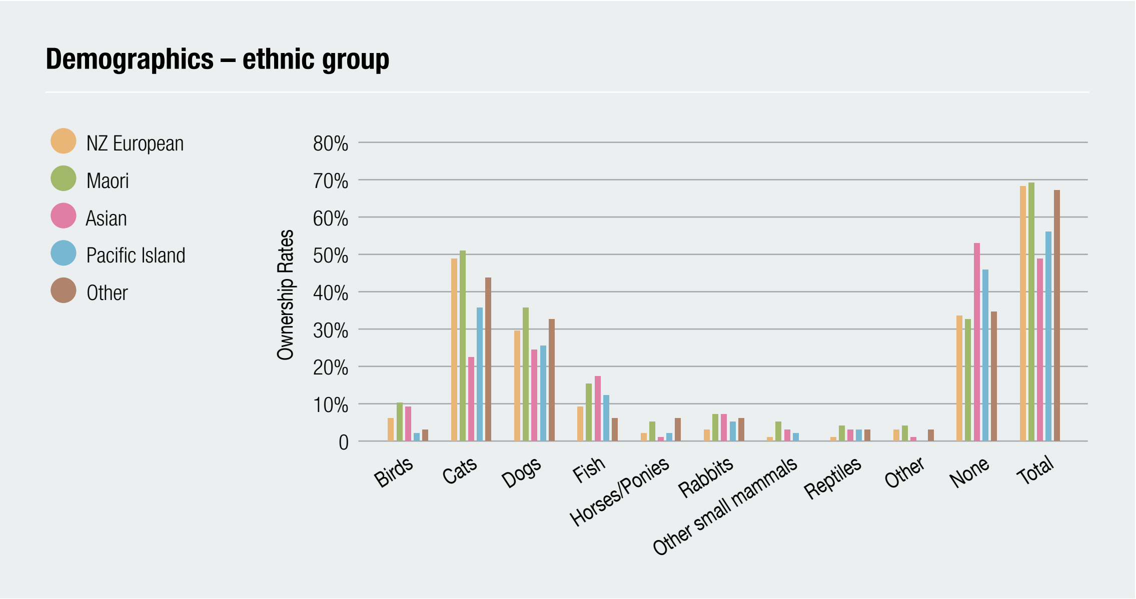

Fig 10

3.2.4 Education, work status and income

Companion ownership rates are highest amongst those with a technical qualification (67%), those working full time (71%) and households with an income of $90k a year or above (72%). In contrast, companion animals are less common amongst people with a university qualification (60%). However, as might be expected, those not working and households earning less than $40k per year (56%) are least likely to share their homes with companion animals (53%). This is likely due to reduced financial capacity of these households to look after companion animals.

Companion animal ownership demographics, 2015

	Education			Work status			Household income		
	Year 13 or below	Technical	University	Full time	Part time	Not working	<$40k	$40k – $90k	$90k+
Birds	7%	7%	6%	8%	6%	5%	5%	10%	6%
Cats	46%	49%	39%	48%	48%	36%	41%	46%	39%
Dogs	30%	26%	28%	32%	28%	22%	21%	29%	28%
Fish	10%	12%	10%	11%	10%	8%	4%	12%	10%
Horses/ponies	2%	2%	2%	3%	2%	2%	2%	2%	2%
Rabbits	3%	3%	4%	4%	5%	1%	2%	4%	4%
Other small mammals	2%	0%	2%	2%	2%	1%	1%	2%	2%
Reptiles	1%	1%	2%	2%	0%	1%	0%	1%	2%
Other	3%	3%	2%	2%	4%	2%	3%	4%	2%
None	34%	33%	40%	29%	32%	47%	44%	33%	28%
Total	66%	67%	60%	71%	68%	53%	56%	67%	72%

Fig 11

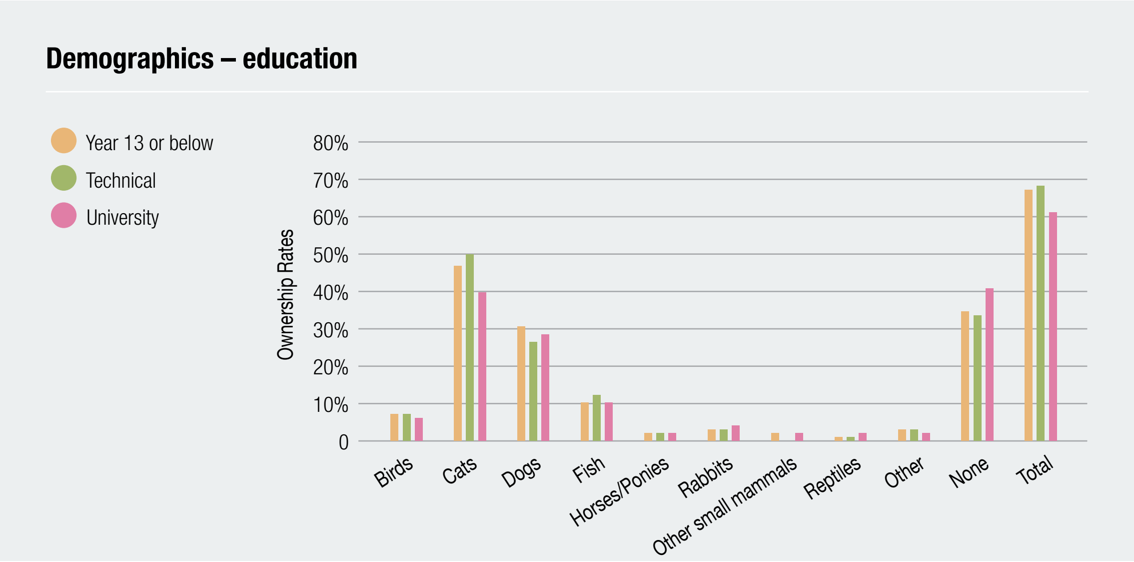

Fig 12

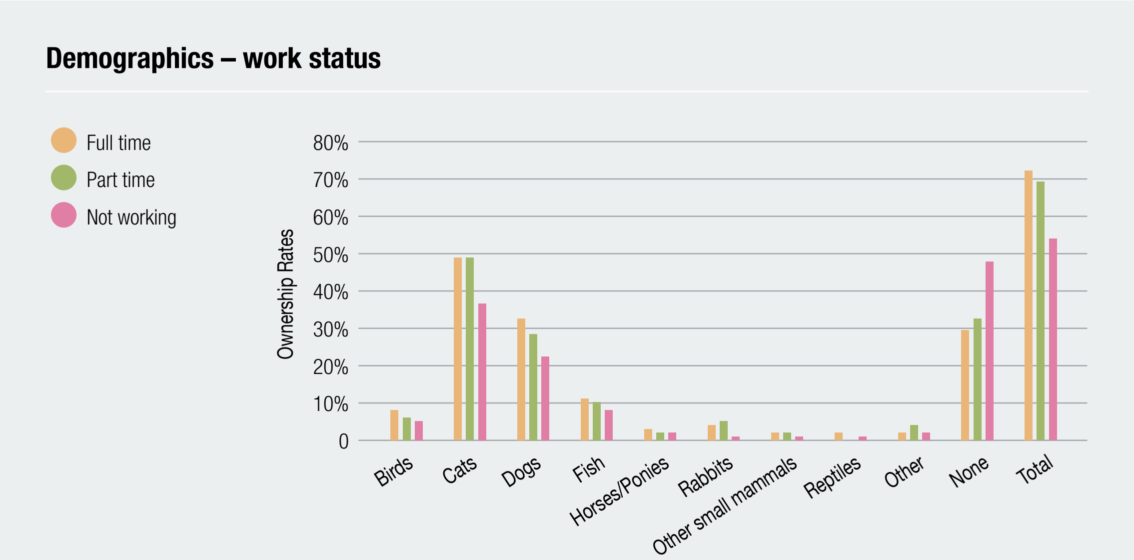

Fig 13

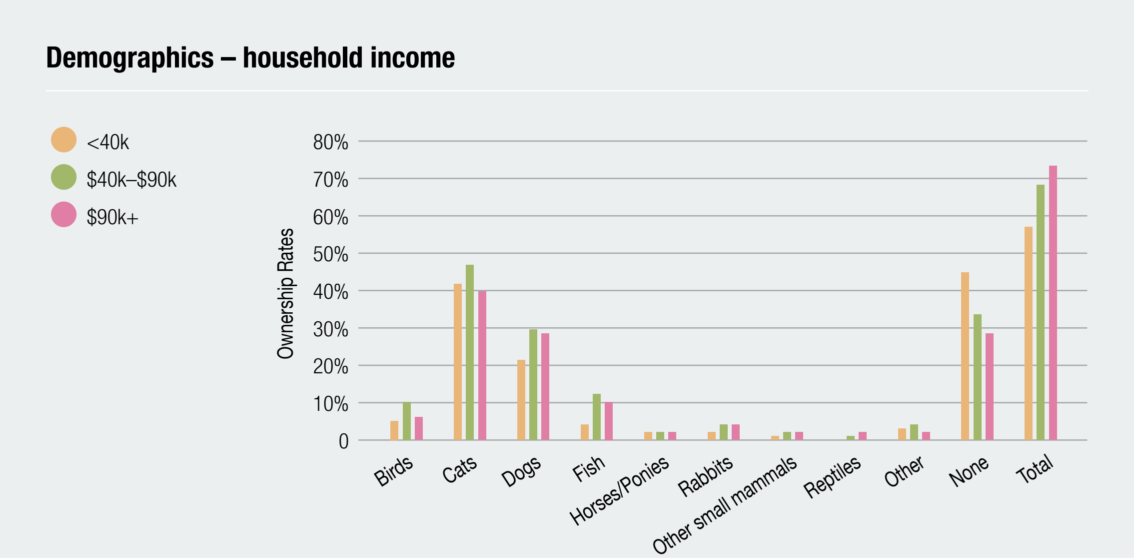

Fig 14

3.2.5 Family and children

Households with couples who are married, de facto or living together are most likely to have companion animals (67%), compared to households with people who are not currently in a relationship or living with a partner (61%).

Households with children are most likely to have companion animals, with nearly four in five households (78%) with children aged nine to 17 years sharing their homes with companion animals. Amongst these households, 57% have cats, 36% have dogs and 19% have fish. This is 13, 8 and 9 percentage points above the averages for these animals respectively.

Companion animal ownership demographics, 2015

	Marital status				Children		
	Single/ never married	De facto/ living together	Married	Separated/ widowed/ divorced	0 to 8 years	9 to 17 years	None
Birds	6%	8%	7%	5%	8%	9%	6%
Cats	43%	54%	41%	45%	47%	57%	41%
Dogs	29%	36%	28%	16%	29%	36%	26%
Fish	10%	12%	11%	7%	17%	19%	7%
Horses/ponies	3%	2%	2%	1%	2%	2%	2%
Rabbits	4%	2%	4%	2%	8%	7%	2%
Other small mammals	2%	2%	1%	0%	2%	3%	1%
Reptiles	2%	1%	1%	0%	2%	2%	1%
Other	3%	4%	3%	1%	4%	2%	2%
None	37%	23%	37%	43%	34%	22%	39%
Total	63%	77%	63%	57%	66%	78%	61%

Fig 15

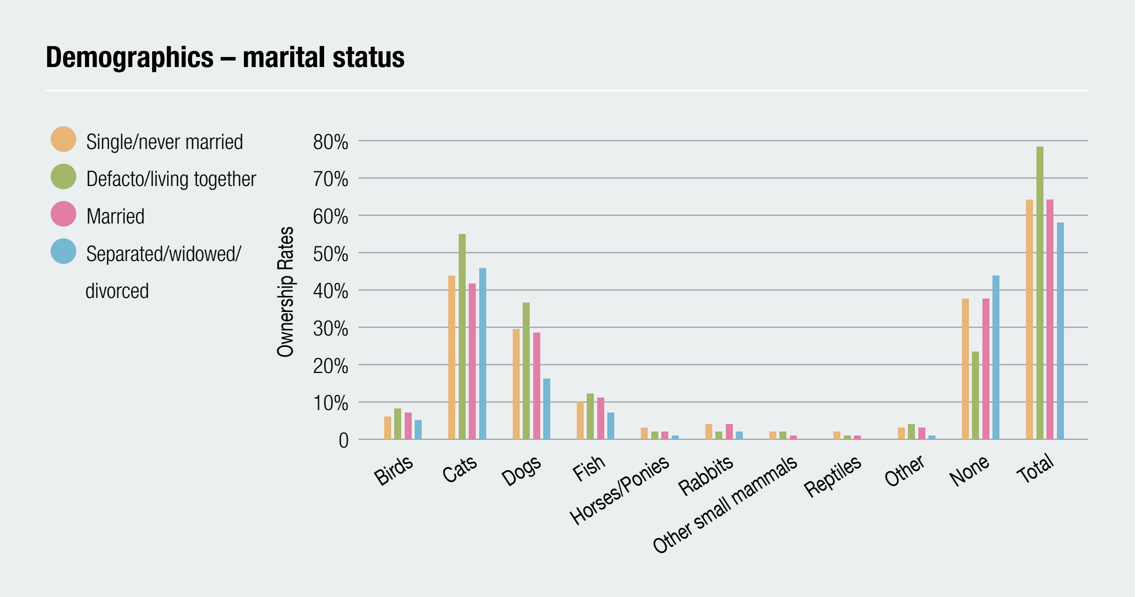

Fig 16

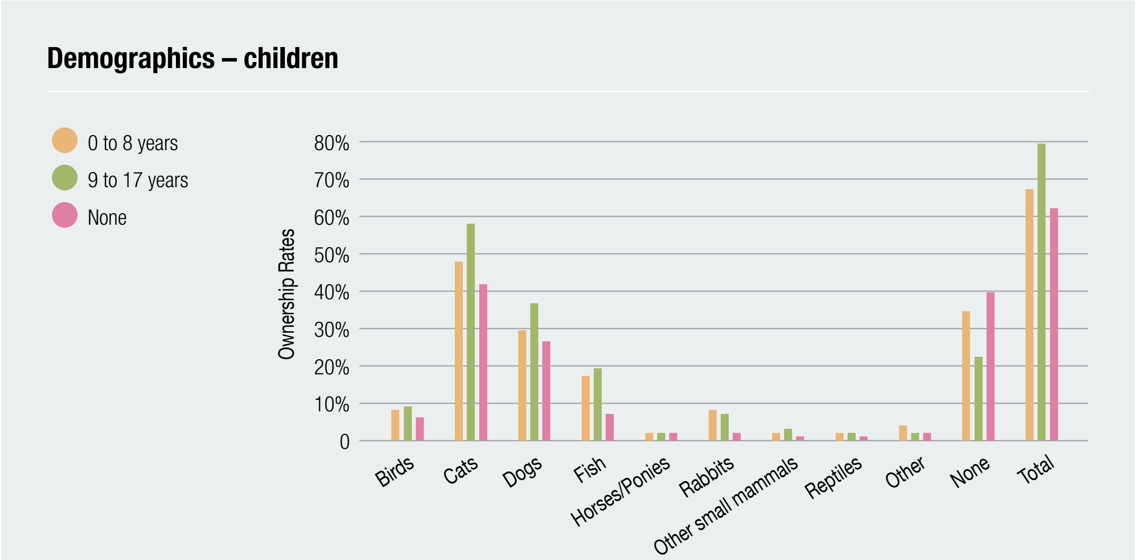

Fig 17

3.3 CATS

Cats are the most popular companion animal in New Zealand in that more people share their homes with cats (44%) than any other animal type. There are 1.134 million cats owned across the country, with the average number per household at 1.5.

However, the percentage of households with cats, the cat population and average number per household of cats has declined since 2011 when these figures were 48%, 1.419 million and 1.8 respectively. This slight downward trend is consistent with industry estimates. The decrease in the population is a result of both a decrease in household ownership rates and the average number of cats per household.

There is variation in this figure across the country. Only 39% of households in Auckland and 40% in Wellington have cats. In comparison, across the rest of the North Island, half of all households have cats. 45% of households in Christchurch have cats, and across the rest of the South Island, 47% have cats. 59% of households in rural locations have cats, compared to 40% in suburban areas. Interestingly, 43% of households in urban areas have cats.

Cats are more popular with women (48%) than men (41%). They are also most popular with people aged 35 to 49 (52%), and least popular with the age group directly below – those aged 25 to 34 (39%). Ownership rates are the same for people working full or part time (48%), but just 36% for those not working. 57% of households with children aged 9 to 17 years have cats, 10 percentage points higher than those with children aged 0 to 8 years (47%).

As outlined in the demographics section, there is a significant difference in ownership rates between people of different ethnic backgrounds. Half of all Māori households have cats, compared to just 22% of Asian households.

3.3.1 Types of cats

Just 4% of owned cats are registered pedigrees. Pure breeds are twice as popular at 8%, however the overwhelming majority of cats are mixed breeds at 88%.

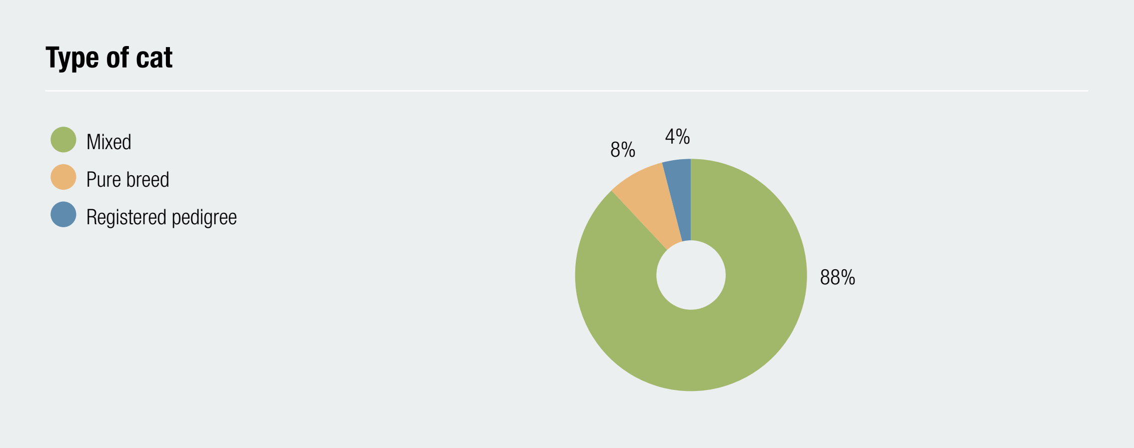

Fig 18

Variations in these figures across New Zealand occur in Wellington, where 8% of cats are registered pedigrees. Registered pedigrees are most popular with Māori households (11%). This may be because cats are most popular amongst Māoris with half of all households sharing their homes with cats.

Of households with cats, pure breeds are most popular in Auckland (12%) and Wellington (11%), amongst 18 to 24 year olds (11%), as well as in households with children aged up to eight years (12%) or earning $90k or more per year (11%). Mixed breeds are most popular in other areas of the South Island (92%) and in households with an income of less than $40k per year (92%).

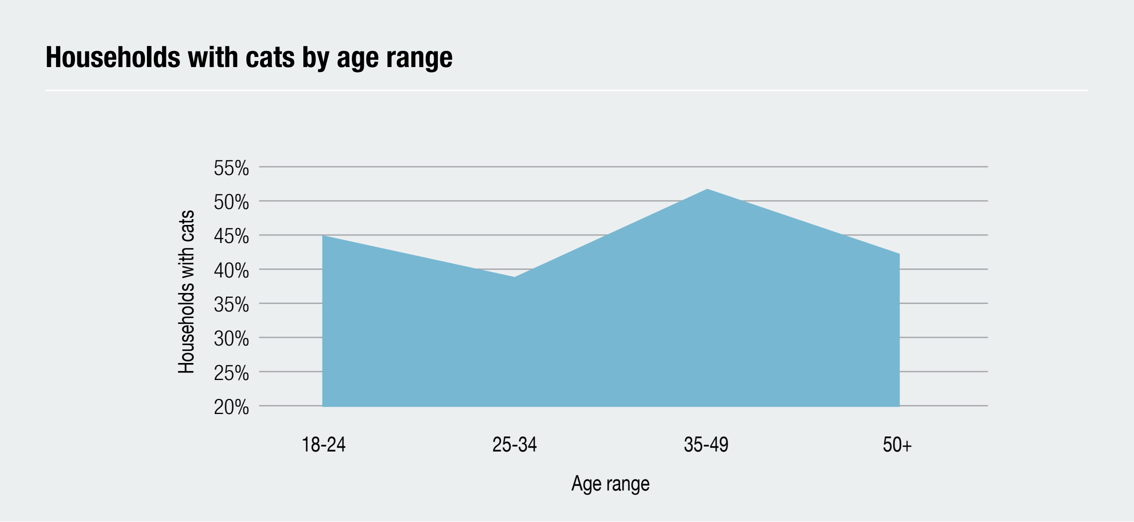

Fig 19

Of cat owners, men are more likely to have a registered pedigree (5%) or pure breed (10%), whereas women are more likely to have a mixed breed cat (90%).

3.4 DOGS

Dogs are the second most popular companion animal in New Zealand, with 28% of households home to an average of 1.4 dogs. There are a total of 683,000 dogs across the country.

Population numbers for dogs have declined marginally since 2011 when the total population of 700,000, and 29% of households, had an average of 1.5 dogs.

There is some geographic variation in ownership rates, with a low of quarter of all households in Wellington providing a home to dogs but up to a high of 31% of households in Christchurch. Auckland is on par with the national average of 28%. 30% of other households in the North Island have dogs, and 26% of other households on the South Island.

There is considerable variation when it comes to the type of area people live in. A quarter of suburban and regional households have dogs, however in rural areas ownership rates are almost double at 45%. 27% of households in city centres are home to dogs.

There is little difference in ownership rates between men (27%) and women (29%). There is more than a 10% difference in ownership rates across different age groups. Ownership rates peak at 35% for people aged 25 – 34 and drop down to 24% for those aged over 50.

A similar level of variation exists across ethnic groups. 24% of households with Asian heritage have dogs, compared to 35% of Māori households; a quarter of Pacific Island households have dogs. These highs and lows for ownership of dogs mirror those for cats across different ethnic groups.

Ownership rates are lowest for those not working (22%) and those earning under $40k per year (21%), and are highest for those working full time (32%) and those earning between $40k and $90k (29%). Given the fact the relative costs of caring for dogs is higher than other companion animals these differences are probably to be expected.

There is an interesting variation in ownership rates based on marital status. Just 16% of people who are separated, widowed or divorced have dogs, whereas 36% of those living together or in de facto relationships share their homes with dogs. People who are single and those who are married are effectively on par with the national average at 29% and 28% respectively. Households with children aged 9 to 17 years are most likely to have dogs at 36%.

3.4.1 Types of dogs

Owners of dogs are most likely to have a mixed breed dog (39%), there are a far higher proportion of pure breeds (36%) and registered pedigrees (18%) amongst the dog population than the cat population.

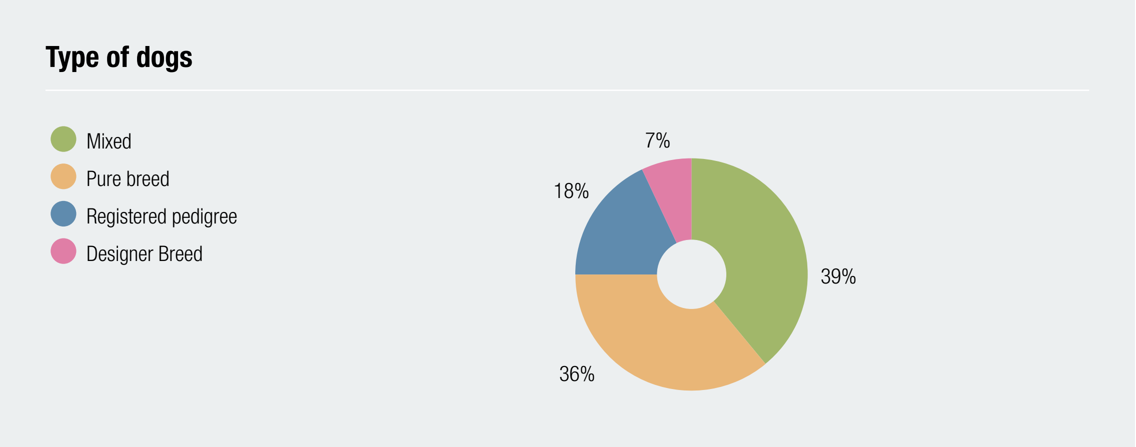

Fig 20

In recent years designer dog breeds such as labradoodles and cavoodles have become more popular and in 2015, 7% of the dog population comprised these designer breeds.

Mixed breeds are most popular with people 25 – 34 years old (43% of people in this age group with dogs have mixed breeds), working part time (45%), living in the South Island (42%) and Māori heritage (46%). Those least likely to have mixed breeds are over 50 (33%), not working (36%) and without children living at home (36%).

Registered pedigrees are most popular with people aged over 50 (24%) and those living outside of Auckland and Wellington on the North Island (22%) and in regional and rural locations across the country (24%). People aged 35 to 49 years (9%) and those living in the South Island (14%) are least likely to have registered pedigrees.

People most likely to have pure breed dogs are aged 35 – 49 years (41%), have children aged 0 – 8 years (45%), and live in the South Island (40%). Those least likely to have these kinds of dogs are 18 – 24 years old (33%), living in Auckland (32%).

Designer breeds are most popular with those aged 18 – 24 (10%) and people living in Auckland (13%). Those least likely to have designer breeds are 35 – 49 years old (5%), and those living outside of Auckland and Wellington in the North Island (4%).

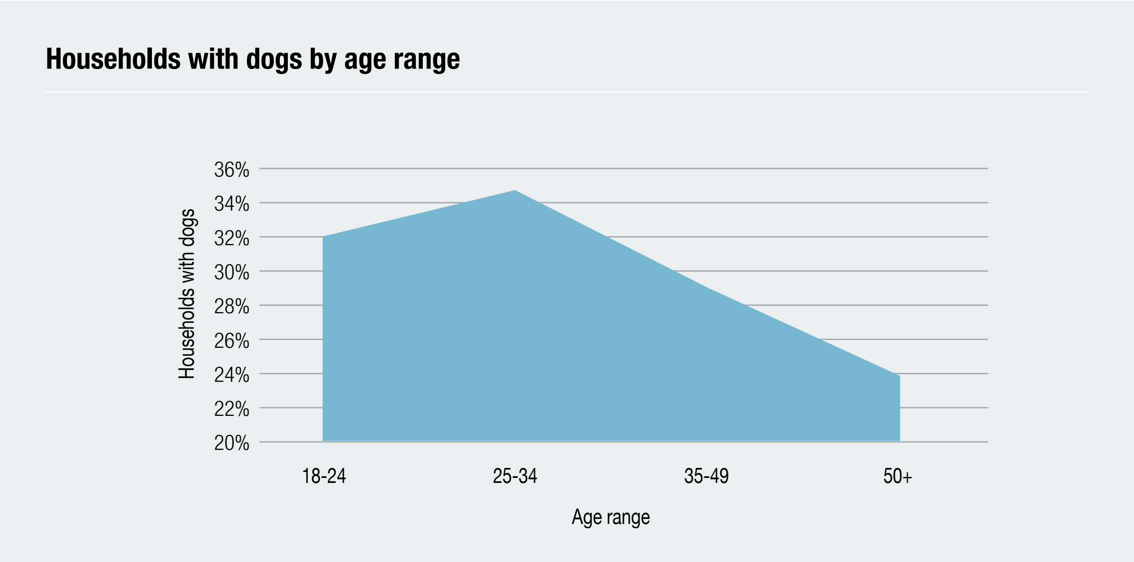

Fig 21

3.5 FISH

At 1.51 million, there are more fish than any other kind of companion animal in New Zealand, with one in ten households having an average of 8.9 fish.

As with cats and dogs, the number of fish, percentage of households with fish and average number per home has declined slightly since 2011 when these figures were 1.678 million, 11% and 9.1 respectively.

There is some geographic variation when it comes to the popularity of fish. Just 8% of households in the South Island have fish compared to 13% in Auckland. Fish are most popular with those aged 35 – 49 (14%) and those with children aged 9 to 17 (19%). In comparison just 6% of people over 50 have fish and 7% of those with no children living at home.

There is a relatively large variation in ownership rates when it comes to income. Just 4% of households earning under $40k a year have fish, where as 12% of households earning over $40k have fish.

Type of fish, 2015

	Percentage
Goldfish in an aquarium	51%
Tropical freshwater aquarium	28%
Pondfish	27%
Marine aquarium	3%
Other	3%
Total	112%

Fig 22

Some households have more than one aquarium set up for their fish. The most popular is goldfish kept in an aquarium, with 51% of all households with fish having this kind of set up.

3.6 BIRDS

Around 7% of all households have an average of 5.4 birds. There are around 595,000 birds across the country.

Birds are more popular in 2015 than they were in 2011. Four years ago 6% of households had an average of 4.9 birds, and the total population was 527,000.

There is very little variation in ownership rates across different demographics. People living in Wellington are least likely to have birds (4%). Those most likely to have birds have a household income between $40k and $90k.

Type of birds, 2015

	Percentage
Caged birds in your home	54%
Chickens in a hen house/garden	27%
Birds in an outdoor aviary	24%
Other	8%
Total	114%

Fig 23

Households may have more than one kind of bird. Most popular are caged birds kept inside the home, with 54% of all bird owners having this kind of set up. 27% of households with birds have chickens in a hen house or in the garden and nearly a quarter (24%) have birds in an outdoor aviary.

Caged birds indoors are most popular with those aged 18 – 24 (64%) and 35 – 49 (62%), people working part time (67%), households with children aged 9 – 17, those living in the South Island (62%) or Auckland (61%), and city dwellers (66%).

People with chickens are most likely living in Wellington (43%) or in a regional or rural location (53%). Bird owners least likely to have chickens are in Auckland (19%), city or urban locations (19%).

3.7 OTHER COMPANION ANIMALS

3.7.1 Rabbits

Rabbits have become more popular over the past four years. Now 3% of households have an average of 2 rabbits. It is estimated there are a total of 116,000 rabbits kept as companion animals across the country.

In 2011 the same proportion of households had rabbits, but slightly fewer at an average of 1.7. This difference has seen the total population increase from 88,000.

Rabbits are most popular in the South Island (5%), Auckland (4%) and with people living in regional and rural areas (5%); also with those aged 18 – 24 and 35 – 49 (both 6%), and households with children (7%). They are also relatively more popular with households that have a Māori heritage (7%)

3.7.2 Ponies and horses

As with rabbits, the same proportion of households has ponies or horses as they did in 2011 (2%), however the average number per household has increased from 3.2 to 3.4. This has seen the total population increase from 87,000 to 116,000.

Ownership demographics are relatively consistent across most areas, except for where people with horses and ponies live. In the South Island, 4% of households have horses or ponies. As would be expected, people living in rural and regional areas are most likely to have horses and ponies, with 7% of all households in these areas enjoying the company of these animals.

3.7.3 Other companion animals

The most common types of other companion animals are small mammals such as mice and rats, and reptiles. Both of these account for 1% of the total companion animal population.

There is little variation in ownership rates for the small mammals and reptiles across the different demographics, with the exception of small mammals being most popular amongst 18 – 24 year olds with 4% of this age group having these kinds of companion animals. A notable anomaly is amongst households with Māori heritage, of which 5% have small mammals and 4% have reptiles.

Other types of companion animals account for 3% of the total companion animal population. People living in rural and regional locations are most likely to have ‘other’ types of companion animals - 8% of all these households. It is expected that these animals most likely include domesticated farm animals such as orphan lambs.

3.8 INTERNATIONAL COMPARISON

An international comparison provides an insight into companion animal populations and trends in similar pet owning countries and regions around the world. Australia, the United States and United Kingdom have been selected for comparative purposes due to their economic and cultural similarities to New Zealand.

In recent years, total ownership rates in New Zealand, Australia and the United States have come become much closer, with only a 2% difference between the three countries currently.

International comparison

Animal type		New Zealand (2015)	Australia (2013)	United States (2015)	United Kingdom (2015)
Cats	Households with cats	44%	29%	35%	17%
	Cats per 100 people	24	15	27	11
Dogs	Households with dogs	28%	39%	44%	24%
	Dogs per 100 people	15	19	24	13
Total	Households with any type	64%	63%	65%	46%

Fig 24

3.8.1 Trends in Australia

In 2013 there were estimated to be more than 25 million companion animals in Australia, with nearly 5 million of Australia's 7.6 million households home to companion animals. At 63%, Australia has one of the highest rates of pet ownership in the world.

Dogs are the most common pet, with 39% of households owning a dog. There are estimated to be 4.2 million pet dogs in Australia; 19 dogs for every 100 people.

Cats are the second most common pet, with 29% of households owning a cat. There are estimated to be 3.3 million pet cats in Australia; 15 cats for every 100 people.

The pet care industry in Australia is estimated to be worth AU$8.0 billion annually.

Australian companion animal population

Animal type	Percentage of households	Total animals (million)
Dogs	39%	4.2
Cats	29%	3.3
Fish	15%	10.7
Birds	13%	4.8
Other pets	7%	2.2
Total	63%*	25.2

Fig 25 | Source: Animal Health Alliance, 2013. * Figure relates to ownership of any type of pet.

3.8.2 Trends in the USA

Over the past 25 years, ownership rates of companion animals in the United States have been steadily increasing from 56% in 1988 to 65% in 2015 (American Pet Products Association, 2015a).

Total number of companion animals in the United States, 2015

Animal type	Million
Freshwater fish	95.5
Cat	85.8
Dog	77.8
Bird	14.3
Small animal	12.4
Horse	7.5
Saltwater fish	9.5
Reptile	9.3
Total	312.1

Fig 26 | Source: APPA, 2015a

The American Pet Products Association (APPA) undertakes a biennial National Pet Owners Survey, the most recent of which was conducted in 2014 and released in 2015. The survey found that more than 10% of current pet owners are new pet owners, which equates to almost eight million new pet owners within the past year, the majority of which are Gen Y and Gen X (APPA, 2015b).

The APPA estimates that total expenditure on the pet care industry in the Unites States will hit US$60 billion in 2015 - up from US$58 billion in 2014 and double the amount spent in 2002 (APPA, 2015a).

According to the survey, the Gen Y pet owners tend to pamper and spend more on their pets than their parents and grandparents. A Gen Y dog or cat owner spends more to purchase their pet; takes them to the vet more often; buys more toys, gifts and care items; and utilises more services than Gen X, Baby Boomers and older pet owners (APPA, 2015b).

Expenditure on companion animals in the United States, 2015

Expenditure area	Amount (US$ billion)
Food	23.04
Veterinary care	15.73
Supplies/OTC medicine	14.39
Pet services: grooming & boarding	5.24
Live animal purchases	2.19
Total	60.59

Fig 27 | Source: APPA, 2015a

3.8.3 Trends in the United Kingdom

The United Kingdom's (UK) peak pet food industry body, the Pet Food Manufacturers' Association (PFMA), estimates the population of companion animals in the United Kingdom to be around 58 million in 2015, with 46% of households home to companion animals (PFMA, 2015c).

The percentage of households with companion animals has fluctuated over the past five years, reaching a high of 48% in 2012-13 and in 2015 returning back to the same level seen in 2010-11 of 46% (PFMA, 2015b).

Companion animal population in the United Kingdom, 2015

Animal type	Total animals (million)	Percentage of households
Indoor fish	19.9	9%
Outdoor fish	17.1	5%
Dogs	8.5	24%
Cats	7.4	17%
Rabbits	1	2%
Domestic fowl	0.7	1%
Guinea Pigs	0.7	1%
Indoor birds	0.5	1%
Hamsters	0.4	1%
Lizards	0.3	1%
Total	58.4	46%

Fig 28 | Source: Pet Food Manufacturers' Association, 2015c

Expenditure on companion animals in the UK was expected to reach a record high of £4.6 billion in 2015, which represents growth of around 25% since 2010 (Davidson, 2015).

The PFMA reports that UK pet food sales reached 1.5 billion tonnes worth €2.8 billion in 2015 (PFMA, 2015a).

Pet-n-Sur Equine

04 Ownership Insights

4.1 SUMMARY

New Zealanders overwhelming consider their companion animals to be members of the family. This is true for 83% of people with cats and 77% with dogs, with these figures unchanged since 2011.

Over half (58%) of people who do not have companion animals would like to get one, which is around 347,000 households. The main barriers to this group having companion animals is their home or lifestyle not being suitable (48%), the landlord or property where people live not allowing animals (34%), cost (32%), and responsibility (23%).

Vets are overwhelmingly considered as the best source of information for companion animal related issues, with 72% of people with companion animals having this view. Other trusted sources of information include the internet (51%), the SPCA (32%) and pet shops (31%).

4.2 ACQUIRING A COMPANION ANIMAL

4.2.1 Reasons for acquiring a companion animal

Companionship is the main reason people get companion animals. It is the most common reason for getting a dog (41%), cat (35%), or bird (19%). Relaxation is the driving reason for getting fish (21%), whereas for rabbits it is 'fun for the children' (22%). In contrast and not surprisingly, the main reason for getting a horse or pony is a hobby (40%).

The top five reasons for getting a cat are companionship (35%), that people have had a cat in the past (16%), it needed a home or adopted us (16%), it was inherited or acquired from a friend, family member or neighbour (9%), and as fun for the children (7%).

More women (38%) than men (32%) say they got their animals for companionship. This reason is highest with people in households earning more than $90k a year (41%), people without children under 18 (40%), those who are not married (39%), and those living in rural and regional areas (38%). Companionship is given as the main reason by only 28% of people with children under 18 and 21% of Māoris.

The top reasons for getting a dog are companionship (41%), that people have had a dog in the past (12%), it was inherited or acquired from a friend, family member or neighbour (5%), and fun for the children (5%). An equal proportion of people got a dog because it needed a home or adopted them (4%), it was someone else's decision (4%), and to encourage exercise (4%).

People most likely to select companionship as the main reason for getting a dog include those living in Wellington (47%) and suburban areas (45%), and people who are not married (44%). In contrast, this reason is only given by 29% of people from ethnic backgrounds other than European and Māori. People without children under 18 years (43%) are more likely to select companionship as the main reason for getting a dog compared to those with children under 18 (37%).

There is quite a lot more variation in the demographics of people whose main reason for getting a bird is companionship. This reason is most likely to be given by those in suburban areas (31%), people living in Wellington (29%), those aged 18 to 24 (29%), those without children under 18 (28%), people working part time (25%) or not currently working (24%), and men (23% compared to 15% of women).

Other common reasons for getting birds are for their eggs (15%) or as a hobby (13%).

There is quite a spread of reasons for acquiring fish. While relaxation is the most popular reason (21%), as a hobby (14%), fun for the children (13%) and because the person had had fish before (11%) featured strongly.

The reasons for acquiring a rabbit are quite mixed. Fun for the children is the most popular reason (22%). Other common reasons include because people had had rabbits before (13%), it needed a home or adopted us (11%), the animal was inherited or it came from a friend, family member or neighbour (9%), or for companionship (9%).

Main reason for acquiring companion animals

Reason	Cats	Dogs	Fish	Birds	Rabbits	Ponies/ horses
Companionship	35%	41%	3%	19%	9%	3%
Have had this type of pet in the past	16%	12%	11%	8%	13%	3%
It needed a home/it adopted us	16%	4%	3%	9%	11%	6%
Inherited it/from a friend, family member or neighbour	9%	5%	6%	3%	9%	6%
Fun for the children	7%	5%	13%	8%	22%	3%
Relaxation	4%	3%	21%	4%	7%	6%
It was a gift	4%	3%	5%	8%	7%	~
It was someone else's decision	3%	4%	6%	2%	4%	6%
Education for children	2%	1%	3%	3%	4%	3%
Give children responsibility	2%	3%	9%	3%	7%	
Hobby	1%	3%	14%	13%	2%	40%
Encourage exercise	0%	4%	~	~	~	6%
To breed/enter competitions	0%	2%	1%	3%	2%	9%
It is a working animal	0%	2%		2%		6%
Security	~	4%	~	~	~	~
Eggs	~	~	~	15%	~	~
Some other reason	2%	4%	4%	2%	4%	~
Total	100%	100%	100%	100%	100%	100%

Fig 29 | Notes: Where '~' is used there were no responses for this option. '0%' represents a very low number of responses that round to '0'.

4.2.2 Desire to acquire a companion animal

Well over half (58%) of all people who do not have a companion animal would like to get one. This equates to around 347,000 households.

Women (61%) are slightly more likely to want a companion animal than men (56%). The desire to get a companion animal is highest with the younger generation and drops off with age – 77% of Gen Y, 65% of Gen X and 46% of Baby Boomers.

City dwellers (69%) are far more likely to want a companion animal than those based in rural and regional areas (49%). People who are not married (66%) are also more likely to want a companion animal than those who are (53%).

For people who would like to have a companion animal, dogs are the most popular choice (67%), followed by cats (50%), fish (10%), birds (6%) and rabbits (6%). Horses and ponies (2%), other small mammals (2%), and other animals (2%) did not rate as highly.

Type of companion animals people would like to have

Animal type	Percentage
Dog	67%
Cat	50%
Fish	10%
Bird	6%
Rabbit	6%
Reptile	5%
Pony/Horse	2%
Other small mammal	2%
Other	2%
Do not know	0%
Total	151%

Fig 30

Dogs are by far the most popular choice for Gen Y (77%) and people from an ethnic background other than NZ European and Māori (77%).

In contrast Baby Boomers (60%), women (57%), people without children under 18 (56%), and NZ Europeans (56%) are most likely to want a cat. The figures are lower for Gen X (40%), men (43%), people with children under 18 (34%), and those of an ethnic background other than NZ European and Māori (29%).

Birds are favoured by people with children under 18 (15%), those from an ethnic background other than NZ European and Māori (13%), households earning more than $90k per year (12%), and Gen X (12%).

Fish are most popular with people from an ethnic background other than NZ European and Māori (22%), those with children under 18 (19%), and Gen X (16%).

4.2.3 Barriers to getting companion animals

The main reason why people who want a companion animal do not have one is that their home or lifestyle is not suitable (48%). This is most likely to be an issue for people living in rural and regional areas (57%) and Gen Y (56%).

Other significant barriers are that the landlord or property where people live does not allow animals (34%), cost (32%), and responsibility (23%), and there is a clear trend across the generations for these barriers. All three of these barriers affect Gen Y most significantly, decrease for Gen X and are least likely to affect Baby Boomers. This is likely due to a combination of increased earning capacity over time and change in lifestyle and life stage as you get older that sees people more able to take on responsibilities, including caring for a companion animal.

Barriers to getting companion animals

Reason	Gen Y (21-35)	Gen X (36-51)	Baby Boomers (52-70)
The landlord/property where I live does not allow animals	50%	32%	24%
Cost	43%	36%	15%
Responsibility	34%	21%	10%

Fig 31

The landlord/property not allowing companion animals is a major barrier for 18 – 24 year olds (58%), those in urban/city areas (50%), people living in Wellington (49%), and Māoris (44%).

The barriers of cost and responsibility are more significant for people working part time (46% and 29% respectively) than those working full time (24% and 26% respectively) or not working at all (30% and 15% respectively).

Barriers to getting companion animals

Reason	Percentage
Home/lifestyle not suitable	48%
The landlord/property where I live does not allow animals	34%
Cost	32%
Responsibility	23%
Other household member does not want one	13%
Allergies	8%
Other reason	11%
Total	167%

Fig 32

4.3 WHERE COMPANION ANIMALS ARE SOURCED

People are most likely to get a cat from the SPCA or an animal shelter (22%). This is followed by a friend (15%), adopting a found or stray cat (14%), a family member (13%), breeder (9%) or pet shop (9%).

The most significant difference for dogs is that 39% come from breeders. This is followed by the SPCA or an animal shelter (12%), a friend (12%), pet shop (9%) or a family member (8%).

Nearly three quarters (74%) of people have bought fish from a pet shop. Other popular places to get fish are a breeder (13%), family member (11%), or a friend (11%).

Over a third of people have bought a bird from a breeder (36%) or a pet shop (37%). Other popular places include a hobbyist or enthusiast (12%), friend (10%), family member (9%) or the SPCA or animal shelter (8%).

Ponies and horses are most likely to be acquired from a breeder (44%), hobbyist or enthusiast (22%) or a friend (19%).

The most popular places to get a rabbit are a breeder (38%), pet shop (26%), or a friend (16%).

Where companion animals are acquired

Source	Cat	Dog	Fish	Bird	Pony/Horse	Rabbit
SPCA/Animal shelter	22%	12%	4%	8%	6%	9%
Friend	15%	12%	11%	10%	19%	16%
Found/Stray	14%	2%	3%	5%	3%	5%
Family member	13%	8%	11%	9%	6%	9%
Breeder	9%	39%	13%	36%	44%	38%
Pet shop	9%	9%	74%	37%	3%	26%
Neighbour	5%	2%	3%	5%	3%	5%
Vet	3%	1%	2%	1%	~	2%
Hobbyist/Enthusiast	2%	4%	5%	12%	22%	~
Other	9%	12%	6%	6%	19%	9%
Total	100%	100%	130%	127%	125%	120%

Fig 33 | Notes: Where '~' is used there were no responses for this option. '0%' represents a very low number of responses that round to '0'. This question was asked for each cat and dog, and generally for the other animal types. As such the totals for the other animal types reflect multiple responses.

4.3.1 Where cats are acquired

The most popular place for acquiring a cat is the SPCA or an animal shelter, with more than one in five cats (22%) adopted from one of these organisations.

Other popular places for acquiring a cat are a friend (15%), adopting a found or stray cat (14%), or from a family member (13%).

This question was expanded in the 2015 survey, providing more options for respondents to select from. This has resulted in a lower proportion of respondents selecting each of the three most popular places for acquiring a cat, and it is important to note it does not allow for a direct comparison.

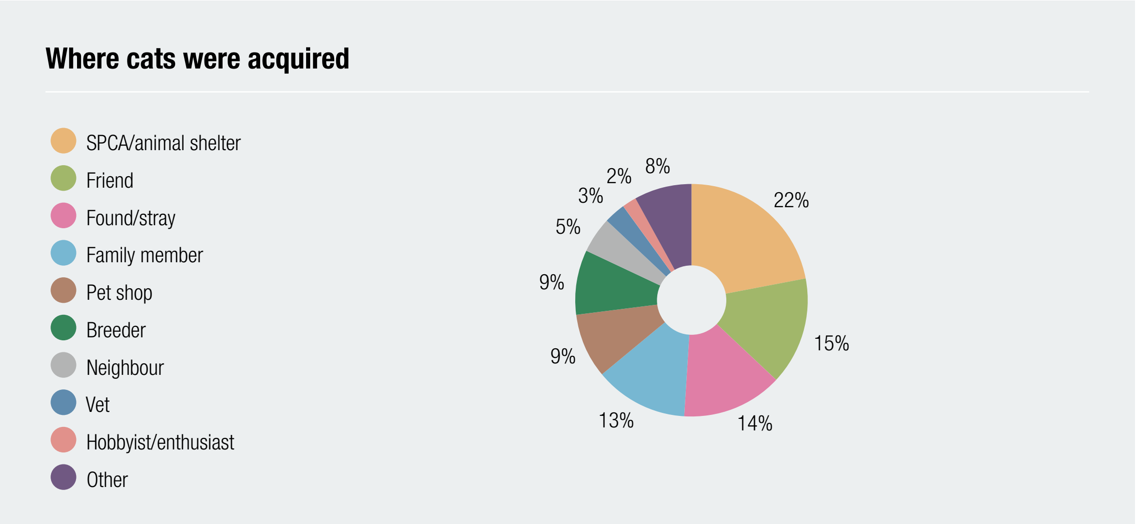

Fig 34

While there is generally little variation in these figures across different demographic groups, there are a few exceptions. In Wellington, where pedigree and pure breeds are popular, cats are more likely to be sourced from a breeder (16%). Similarly, 14% of Māori households acquired their cats from a breeder, as would be expected given the relative popularity of registered pedigrees.

Across all demographic breakdowns, households most likely to adopt a cat from the SPCA or an animal shelter are those earning $90k per year or more (28%). In contrast those least likely to adopt are those earning less than $40k per year (18%) or those living in rural and regional areas (18%). For people living in rural and regional areas, the lower adoption rates from the SPCA or animal shelters is possibly simply due to proximity. People living in these areas are most likely to get a cat from a friend (19%), as are people who have achieved Year 13 qualifications or below (20%). Households in the lower income bracket are most likely to get a cat from a family member (20%).

4.3.2 Where dogs are acquired

By far the most popular place to get a dog is from a breeder, with 39% acquired in this way. While this is fairly consistent across different demographics, those least likely to get a dog from a breeder are Gen X (36%), those working part time (32%), people with children under 18 (32%) and those with Māori heritage (28%).

Where dogs were acquired

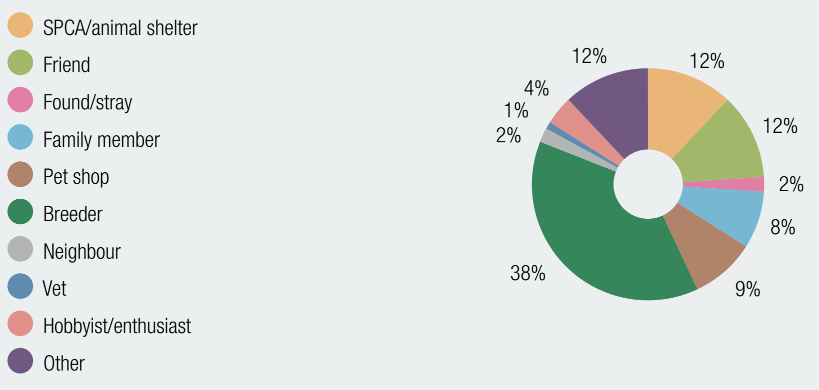

Fig 35

Around 12% of dogs are acquired via the SPCA or an animal shelter. This number is highest with households that have children aged 9 to 17 (17%), and lowest with households earning less than $40k per year (6%) and people with Māori heritage (5%).

People are equally likely to get a dog from a friend (12%), and those of Māori heritage (23%) are by far the most likely to acquire dogs in this way.

Around 9% of dogs are purchased from a pet store. Baby Boomers (5%), people with children aged 9 to 17 (4%), and households earning less than $40k per year are least likely to get their dogs here. Those most likely include Gen X (13%), people living in Auckland (18%) and those from a background other than NZ European or Māori (15%). Men (12%) are also more likely to get a dog from a pet shop than women (7%).

4.3.3 Where other pets are acquired

By far the most popular places to get a bird are a pet shop (37%) or a breeder (36%), with people also sourcing their pets from a hobbyist/enthusiast (12%), friend (10%), or family member (9%).

Men (40%) are more likely to get a bird from a pet shop than women (33%). These figures are reversed for getting birds from a breeder. People from a non NZ European or Māori background (68%), Gen Y (47%), and people with children under 18 (45%) are most likely to get birds from a pet shop. Those least likely include Baby Boomers (20%), people living in rural and regional areas (21%), and those with a Māori heritage (25%).

Breeders are a more popular place to get birds for those in the South Island (55%), Baby Boomers (50%), and people living in rural and regional locations (41%). Gen Y (26%) and people from a non NZ European or Māori background (26%) are less likely to get birds from a breeder.

As might be expected, pet shops are the first port of call for most people looking to get fish (74%), with other sources including breeders (13%), family (11%), or friends (11%).

Gen X (81%) are more likely to get fish from a pet shop than Baby Boomers (64%), with one in five Baby Boomers getting fish from friends. People in suburban areas (82%) are more likely than those in rural and regional areas (56%) to get fish from a pet shop, with just over one in four (26%) people in rural and regional areas getting fish from a breeder.

People who are not in paid work (65%) are less likely to get fish from a pet shop, as are households earning under $40k per year (43%), who are much more likely than any other group to get fish from a friend (36%).

The most popular place to get a pony or horse is from a breeder (44%), followed by a hobbyist or enthusiast (22%) or from a friend (19%). Just 6% of horses come from the SPCA/animal shelter.

Most rabbits are sourced from a breeder (38%), pet shop (26%) or a friend (16%), while a smaller number are acquired through the SPCA or an animal shelter (9%) or a family member (9%).

4.4 TRUSTED SOURCES OF INFORMATION

People with companion animals were asked who or what they consider to be the best sources of information for pet related issues.

Vets are regarded as the best source of information for companion animal related issues (72%). This is followed by the internet (51%), the SPCA (32%) and pet shops (31%).

While these numbers are all marginally lower than in 2011, the SPCA is now considered a better source of information than pet shops.

Best sources of information for companion animal related issues

Source	Cat	Dog	Bird	Fish	Pony/ Horse	Rabbit	Total
Vets	76%	77%	60%	60%	75%	58%	72%
The internet	49%	51%	60%	60%	59%	64%	51%
SPCA	35%	32%	31%	22%	16%	33%	32%
Pet shops	31%	29%	38%	47%	19%	49%	31%
Books/the library	15%	18%	18%	19%	22%	24%	15%
Breeders	13%	21%	22%	14%	25%	27%	15%
Family members	11%	14%	13%	9%	12%	11%	12%
Neighbours/friends	10%	14%	18%	10%	25%	15%	11%
Animal shows on television	8%	10%	8%	8%	~	7%	8%
NZCAC	4%	7%	4%	4%	~	7%	5%
None of the above	3%	3%	4%	3%	3%	7%	3%
Total	254%	275%	276%	259%	256%	302%	254%

Fig 36

More women (78%) consider vets to be a good source of information than men (66%). Vets rated highest with those in rural and regional areas (81%), people living in the South Island (81%) and Baby Boomers (80%), and lower with Gen Y (63%), people living in the city (63%) (as separate from suburban areas), and people from a background other than NZ European or Māori (50%).

Consideration of the internet as a good source of information was remarkably consistent across different demographics, including generation groups - 50% of Gen Y, 54% of Gen X and 51% of Baby Boomers.

The SPCA rated highest with younger age groups, being consider to be a good source of information by 38% of people aged 18 to 24, 35% aged 25 to 34, 31% aged 35 to 49 and 29% aged 50 plus. The SPCA rated highest with those living in the city (37%) and those with a Māori heritage (49%). The SPCA was least likely to be considered a good source of information by people living in rural and regional areas (25%).

Pet shops are favoured as good sources of information by Gen X (37%), people living in the city (36%), and those with children aged under 18 (36%). Pet shops rated lowest with people who do not have children aged under 18 (27%) and those in rural and regional areas (20%).

4.4.1 Accessing information

The majority of people (88%) feel easily able to access enough quality information about responsible care of companion animals. Over two thirds (68%) say there is information easily available in print or online, although around one in five (19%) believe the information is only available verbally from an expert like a vet.

7% of people feel there is a lot of information available but it is often contradictory, and 2% feel there is not enough information available.

Access to quality information on responsible companion animal care

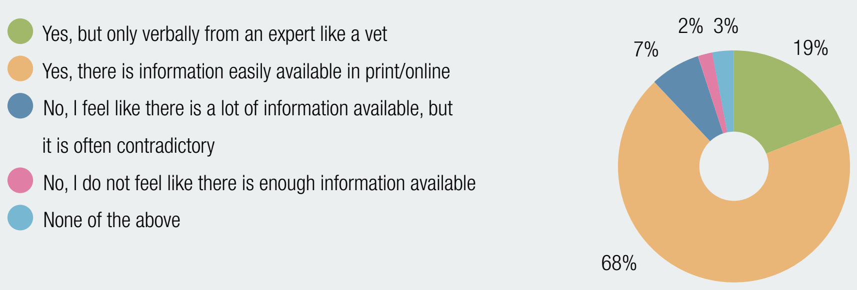

Fig 37

Those most likely to feel there is information easily available in print and/or online include Gen X (76%) and households earning more than $90k per year (73%). This response is least likely to be given by Gen Y (62%), those not working (62%), households earning under $40k per year (57%), those with a Māori heritage (56%) and those from a heritage other than NZ European or Māori (55%).

Those most likely to feel there is a lot of information available, but that it is often contradictory, include those with a Māori heritage (14%), Gen Y (13%), those not working (10%), and people living in Wellington (10%).

There is not much variation across different demographics in terms of those who feel there is not enough information available; however this view is most strongly held by those with a background other than NZ European or Māori (8%), and a Māori heritage (5%).

4.5 THE ROLE OF COMPANION ANIMALS

New Zealanders overwhelming consider their companion animals to be members of the family. This is true for 83% of people with cats and 77% with dogs, with these figures unchanged since 2011.

Role companion animals play in the household

Role	Cat	Dog	Fish	Bird	Rabbit	Pony/ Horse
Member of the family	83%	77%	31%	53%	60%	34%
Trusted companion	12%	16%	2%	7%	11%	19%
Hobby	2%	2%	51%	18%	18%	37%
Security	0%	3%	1%	2%	2%	~
Working animal	1%	3%	2%	17%	~	6%
Some other role	2%	0%	12%	4%	9%	3%
Total	100%	100%	100%	100%	100%	100%

Fig 38

A huge 83% of people with cats consider them to be members of the family, which is consistent with the 2011 findings. A further 12% view them as trusted companions, up from 10% in 2011.

A higher proportion of women (87%) see their cats as members of the family, compared to 77% of men.

Well over three quarters (77%) of people with dogs view them as members of the family, with a further 16% considering them to be trusted companions. This is unchanged from 2011.

As with cats, more women (78%) than men (75%) agree that their dogs are members of the family. This view is held more strongly by those on the South Island (85%) and in suburban areas (82%),

compared to those in regional and rural areas (66%). This is due to more dogs being seen more as working animals (8%) in the country.

There has been an interesting shift in how fish are viewed, with 31% now seen to be members of the family, up from 20% in 2011. Correspondingly, the number of people who view their fish as a hobby has fallen from 60% to 51% during this time.

Birds play more mixed roles, with 53% considered members of the family, 18% a hobby and 17% as working animals, with the latter being chickens kept for egg laying. This appears to have become considerably more popular over the past four years, with just 7% of birds kept as 'working animals' in 2011. During this time the proportion of birds kept as a hobby has decreased from 27%.

More people now consider their rabbits to be members of the family (60%), up from 53% in 2011, with the proportion kept as a hobby decreasing from 28% to 18%. 11% are considered trusted companions, which is unchanged.

There is a more even split in the roles horses and ponies play, with 37% kept because of a hobby, 34% seen as members of the family and 19% viewed as trusted companions.

4.6 RESPONSIBILITY FOR CARE

When it comes to primary responsibility for care of companion animals, depending on the animal there is quite a lot of variation in terms of whether this role sits largely with one person in the household or is evenly shared.

79% of fish and 77% of birds are primarily cared for by one person. Shared responsibility for care is more common for cats (36%), rabbits (40%), dogs (41%), and horses and ponies (44%).

Women (67%) are far more likely than men (48%) to be the primary carer for cats, with relatively little differentiation across the generations. Gen X (40%) is more likely to share care than Gen Y (33%) or Baby Boomers (34%).

For dogs, women (56%) are also more likely than men (46%) to be the main carers, although the difference is not as significant as seen with cats. Baby Boomers (48%) are most likely to equally share care compared to Gen Y (35%) and Gen X (41%).

For fish, men (70%) are far more likely than women (53%) to be the main carer. This is also true for Gen X and Baby Boomers (both 67%), compared to Gen Y (52%). Shared care is most common with Gen Y (34%), with the figures dropping significantly for Gen X (17%) and Baby Boomers (8%).

Primary responsibility for the care of horses is more likely to sit with men (43%) than women (28%), and Gen X (55%) or Gen Y (39%) than Baby Boomers (10%). Baby Boomers (50%) are more likely to share responsibility for care.

Women (53%) are more likely than men (38%) to be the main carer of rabbits, as are the younger generations (Gen Y: 57%, Gen X: 42%, and Baby Boomers: 34%). Shared responsibility is most likely amongst Gen X (50%) compared to Gen Y (30%) and Baby Boomers (33%).

Unlike other animal types, for birds there is little difference between men (62%) and women (64%) when it comes to being the main carer. As with rabbits, those who are younger are more likely to have primary responsibility for care (Gen Y: 65%, Gen X: 62%, and Baby Boomers: 57%). Conversely, older generations are more likely to share the responsibility (Baby Boomers: 37%, Gen X: 22%, and Gen Y: 18%).

5
Ownership
Trends

Pet-n-Sur

05 Ownership Trends

5.1 SUMMARY

There are a number of important components to responsible companion animal ownership and their care. These include desexing, microchipping and registration on the New Zealand Companion Animal Register (NZCAR) and, for dogs, with local councils. Each of these has seen significant improvements over the past four years.

From 2011 to 2015 desexing rates have increased 8% for cats from 86% to 93%; and 19% for dogs from 63% to 75%. The proportion of cats microchipped has more than doubled from 12% to 31%; and increased by nearly 50% for dogs from 48% to 71%. 79% of microchipped cats and 67% of microchipped dogs are on the NZCAR; and 91% of dogs are registered with their local council.

Another key trend is around pet insurance, which has roughly doubled in popularity in the past four years. One in ten (10%) cat owners and nearly one in five dog owners (19%) now have insurance for their animals.

The vast majority (88%) of cats spend time both indoors and outdoors, which is also the case for well over half (65%) of all dogs. Interestingly, a higher proportion of dogs (20%) live indoors only compared to just 8% of cats.

Over a third (34%) of all households with companion animals have bought items for their animals online.

Trends in desexing, microchipping and insurance

Ownership trend	Animal type	2011	2015
Desexing	Cats	86%	93%
	Dogs	63%	75%
Microchipping	Cats	12%	31%
	Dogs	48%	71%
Insurance	Cats	5%	10%
	Dogs	8%	19%

Fig 39

5.2 DESEXING

Over the past four years desexing rates for cats have increased 8% from 86% to 93%. During the same period, desexing rates for dogs have increased significantly (19%), up from 63% in 2011 to 75% in 2015.

These rates are higher than the most recently reported figures from Australia, where 91% of cats and 71% of dogs are desexed (Animal Medicines Australia, 2013).

While high overall, desexing rates for cats are highest in suburban areas at 96%, and lowest in rural and regional areas at 91%. Geographically, by far the highest rate of desexing is in Wellington at 99%, with the lowest being in Auckland at 91%. Gen X and Baby Boomers who have cats are most likely to have their cats desexed at 94% and 95% respectively, compared to 89% of Gen Y cat owners.

Desexing rates across registered pedigrees, pure breeds and mixed breeds are largely consistent at 93%, 92% and 93% respectively.

As with cats, desexing rates for dogs are highest in suburban areas at 85%. This drops to 72% in urban areas and 67% in rural and regional areas. The desexing rate for dogs is consistent across all parts of the country. Mirroring the trend seen with cats, Gen X and Baby Boomers are most likely to desex their dogs at 81% and 74% respectively, compared to just 69% of Gen Y dog owners.

There is quite a range in desexing rates depending on the type of dog - 60% of registered pedigrees, 71% of pure breeds, 89% of designer breeds and 83% of mixed breeds are desexed.

The Society for the Prevention of Cruelty to Animals (SPCA) advocates the desexing of cats and dogs from 6 weeks of age to prevent the births of unwanted animals that could increase the stray population. It is SPCA policy that all animals are desexed before being adopted to a new home.

Other important benefits from desexing include (SPCA, 2015):

- **No desexed dog or cat can ever get cancer or other diseases of the reproductive organs**, such as testicular tumours, cystic ovaries, ovarian tumours or acute or chronic uterine infections. Desexed animals are also at far less risk of mammary cancer, prostate diseases, perianal tumours and perianal hernias. There will never be a risk of pregnancy complications. Because neutered animals avoid these medical problems they tend to live longer, healthier lives.
- **A desexed animal is often a more relaxed companion animal**. Neutering reduces an animal's desire to roam and fight.
- **Desexing decreases embarrassing behaviours** like leg mounting and spraying, and eliminates the frantic pacing and crying of a cat in heat.
- **Desexing your pet saves you a lot of money.** A pregnant animal requires additional food, as will the puppies or kittens. They may also need extra veterinary care.

- **Desexing reduces roaming,** thereby lessening the likelihood of your animal being hit by a car or getting injured in fights with other animals. "Entire" animals are more likely to roam in search of a mate.
- **Most councils have cheaper registration fees** for neutered dogs.
- **Desexing fees for your animal are very reasonable** and veterinarians are already keeping costs to a minimum to encourage people to have their animals desexed.

5.2.1 Barriers to desexing

There is a mix of reasons why people have not had their cats and dogs desexed.

For cats, the most common reason is cost (28%), followed by the animal being too young (23%), a feeling that it is unnecessary to do so (20%), or that the animal was not desexed at the time it was acquired and it is now too old (20%).

Those most likely to select cost as a reason are aged 18-24 (50%), not working (47%) or earning less than $40k per year (46%).

While 23% of people selected the animal being too young as a reason for not desexing, the SPCA recommends cats are desexed at six weeks of age. This would seem to indicate a gap in understanding about what age it is best to have the procedure done. Interestingly, this reason is most likely to be given by women (35% compared to men at 15%), Baby Boomers (30%), people working part time (40%), earning less than $40k (36%), and without children (31%).

One in five cat owners do not see desexing as being necessary. This would indicate that the reasons for desexing have not resonated effectively to drive behaviour change. This reason is most likely to be given by Gen X (28%) and people living in the city (25%).

Barriers to desexing cats

Reason	Percentage
Cost	28%
Concern about the process	8%
Feel it is unnecessary	20%
Animals should have at least one litter	8%
Was not desexed when we got it and it is now too old	20%
Too young	23%
Some other reason	10%
Total	118%

Fig 40 | Note: More than one response could be selected.

While cost was also an issue for one in five dog owners, 34% of people say their dogs are kept for breeding, with 28% feeling desexing is unnecessary.

Cost is more likely to be an issue with Gen Y (26%) and those not working (35%). Those who do not think it is necessary are more likely to be Gen Y (32%) or earning less than 40K per year (42%).

Barriers to desexing dogs

Reason	Percentage
Cost	20%
Concern about the process	34%
Feel it is unnecessary	9%
Animals should have at least one litter	28%
Was not desexed when we got it and it is now too old	10%
Too young	6%
Some other reason	13%
Total	121%

Fig 41 | Note: More than one response could be selected.

5.3 MICROCHIPPING

In recent years it has become a legal requirement to microchip dogs. While encouraged, it is not mandatory for cats to be microchipped.

In the past four years the proportion of cats that are microchipped has more than doubled from 12% in 2011 to 31% in 2015. There has also been a significant increase in microchipping of dogs, increasing by nearly 50% from 48% to 71%.

The generational trend seen in desexing practices is reversed when it comes to microchipping. 39% of Gen Y cat owners have microchipped their animals compared to 35% of Gen X and 22% of Baby Boomers. Microchipping of cats is least common in rural and regional areas at 19%. 30% of cats in urban areas and 40% in suburban areas are microchipped. Registered pedigrees (53%) and pure breeds (48%) are more likely to be microchipped than mixed breeds (29%).

Across the generations, those belonging to Gen X with dogs are most likely to microchip their animals at 78%, compared to 71% of Baby Boomers and 68% of Gen Y dog owners.

Four in five dogs in suburban areas are microchipped compared to 67% in rural and regional areas and 65% in urban areas. Designer breeds are most likely to be microchipped at 78%, followed by mixed breeds (73%), pure breeds (70%) and registered pedigrees (64%). A possible reason for this reduction is the exemption of “working dogs” from microchipping in the Dog Control Act.

5.3.1 Barriers to microchipping

The most common reason for not microchipping is that people feel it is unnecessary or not important. This is true for 57% of people who have not microchipped their cats and 42% of people who have not microchipped their dogs.

For those with cats, this reason is most common with men (65% versus 51% of women). There is relatively little variation across other demographics.

For people with dogs, men are also more likely to have this view (52% versus 34% of women). This reason is also far more common with Gen Y (47%) and Baby Boomers (54%) compared to Gen X (21%). People without children (53%) and those having completed a technical education (50%) are also more likely to give this reason.

21% of people with cats and 25% of people with dogs say they have not, as yet, microchipped their animal.

The people with cats most likely to list this as a reason are Gen Y (30%) and those living in Wellington (40%). Dog owners most likely to give this reason are men (31% compared to 20% of women), Gen X (35%), those with children (35%), and those living in the city (33%).

One in four people who have cats and nearly one in five with dogs listed cost as a reason for not microchipping. This reason is more likely to be given by those living in the city – 31% of cat owners and 27% of dog owners whose animals are not microchipped. Cost was also more likely to be an issue for cat owners earning under $40k (32%).

Barriers to microchipping

Reason	Cats	Dogs
Cost	25%	19%
Feel it is unnecessary	57%	42%
Haven't gotten around to it	21%	25%
Concerned about the process	4%	5%
Some other reason	12%	26%
Total	119%	117%

Fig 42

5.4 REGISTRATION

Expenditure on registration and membership for dogs has increased by 80% from an estimated $41.7 million in 2011 to $52 million in 2015. For cats the increase has been far greater, up 160% from an estimated $4 million in 2011 to $10.4 million in 2015. It is somewhat lower for horses and ponies, decreasing 23% from $3.9 million to $3 million over the same time frame.

Since it was founded in September 2007, more than 405,000 companion animals have been registered on the New Zealand Companion Animal Register (NZCAR) using their unique microchip identification numbers. In the past four years alone just over 270,000 animals have been added to the register, an increase of nearly 200%.

79% of microchipped cats and 67% of microchipped dogs are on the register, with 91% of dogs registered with their local council.

Of the small proportion of dogs not registered with their local councils, the main reasons for this are cost (41%), that people have not gotten around to it (24%), a feeling that it is unnecessary or not important (22%), or that they did not know they needed to (11%).

Animals with registered microchips

Animal type	30 May 2011	30 Sept 2015	Increase
Cats	70,311	230,586	228%
Dogs	64,505	172,094	167%
Rabbits	834	2,921	250%
Horses	38	153	303%
Rodents	~	43	~
Birds	10	41	310%
Goats	6	19	217%
Turtles	12	15	25%
Ferrets	~	9	~
Lizards	8	8	0%
Rodents	7	~	~
Tortoises	2	7	250%
Pigs	~	4	~
Fish	2	3	50%
Donkeys	~	3	~
Cattle	~	1	~
Total	135,735	405,907	199%

Fig 43 | Source: New Zealand Companion Animal Register. 2011 & 2015

5.5 PET INSURANCE

Caring pet owners can be unprepared to manage expensive veterinary bills if their companion animals unexpectedly fall ill or require emergency veterinary treatment. Insurance companies, including specialist pet insurance companies such as Pet-n-Sur and Southern Cross Pet Insurance, offer a range of plans to suit different pet owner needs and budgets. Other organisations and companies operating in the companion animal sector, also provide pet insurance services.

In the past four years the popularity of pet insurance in New Zealand has roughly doubled. One in ten (10%) cat owners and nearly one in five dog owners (19%) now have insurance for their animals; this is compared to just 5% and 8% respectively in 2011. For people with horses and ponies the increase has been more moderate, from 13% to 16%.

The main reasons cat owners do not have insurance is that they do not see the value in it (54%), it is considered too expensive (32%), or they do not know much about it/have not looked into it (25%). Just 8% did not know it was available.

Households earning more than $90k (67%), men (61%) and those living in regional and rural areas (60%) are more likely to list not seeing the value as a reason for not having insurance.

The breakdown of reasons dog owners do not have insurance is similar. Dog owners who live in rural and regional areas (55%), earning more than $90k a year (54%) and those working full time (50%) are most likely to list not seeing the value as the reason they do not have insurance.

There is also a similar proportional breakdown of reasons people with horses and ponies do not have insurance. Men (85%) and Gen Y (75%) horse/pony owners are far more likely to list not seeing the value as a reason for not having insurance.

Reasons for not having pet insurance

Reason	Cats	Dogs	Horses/ponies
Do not see the value	54%	44%	55%
Too expensive	32%	37%	30%
Do not know much about it/ not looked into it	25%	22%	22%
Did not know it was available	8%	8%	11%
Some other reason	5%	8%	18%
Total	125%	119%	137%

Fig 44

The increase in popularity of pet insurance helped see the amount spent each year increase by 139% from $15.7m to $37.5m.

Annual expenditure on insurance

Animal type	2011		2015	
	$ million	% total	$ million	% total
Cats	4.8	13%	15.9	42%
Dogs	8.1	52%	20.0	53%
Horses/ponies	2.8	18%	1.6	4%
Total	15.7	100%	37.5	100%

Fig 45

5.6 INDOORS VERSUS OUTDOORS

There is a reasonable difference between cats and dogs when it comes to whether animals live exclusively indoors or outdoors, or a combination both.

Fewer than one in ten cats (8%) lives exclusively indoors, with just 4% kept outdoors only. The vast majority (88%) spend time both indoors and outdoors.

One in five (20%) dogs lives indoors, with slightly fewer (15%) living outdoors. Most dogs (65%) spend time both indoors and outdoors.

These figures are quite different for animals living in Australia. More than one third (34%) of cats and 11% of dogs are kept indoors; with 8% of cats and 24% of dogs living exclusively outdoors (Animal Medicines Australia, 2013).

For cats in New Zealand, there is almost no variation in these figures based on whether people live in urban, suburban, rural or regional areas. However, people living in Auckland are more likely to have indoor only cats (12%) compared to just 2% in Wellington.

For dogs, people living in urban and suburban areas are roughly twice as likely (25% and 21% respectively) to have indoor only dogs than people based in rural and regional areas (12%). As is the case with cats, people living in Auckland are far more likely to have indoor only dogs (29%) compared to those in Wellington (6%).

5.7 ONLINE PURCHASES

One in three households with companion animals (34%) has bought companion animal-related items online. The most popular items are pet food (15%), toys and accessories (15%) and equipment, such as litter or a water pH tester for fish (12%).

Households with companion animals that have bought animal related items online

Item	Percentage of households
Companion animal	5%
Pet food (same quality as sold by vets)	9%
Pet food (same quality as sold by supermarkets)	6%
Consumables (e.g. litter, water pH tester)	5%
Equipment (e.g. food bowls, water bubbler, aquarium decoration)	12%
Toys and accessories	15%
Grooming products	6%
Healthcare products	7%
None of the above	66%

Fig 46

06 Consumer Expenditure

6.1 SUMMARY

This survey found total expenditure across all categories of the estimated four million companion animals in New Zealand was $1.8 billion, up from $1.6 billion in its previous survey in 2011.

Of this, the cat and dog sectors made up $1.5 billion, or 86%, which was (proportionately) slightly down from 2011, when expenditure on cats and dogs accounted for 92% of the total. This reflects the shift in companion animal population numbers over this period.

Despite having almost half the population size of fish and cats, dogs accounted for the highest annual expenditure of all companion animals in New Zealand at $797 million, or 44% of the total.

This was similar to the 2011 survey findings, in which dogs accounted for 48% of total expenditure at $752 million.

Across all animal types in New Zealand (except fish), food was the largest cost for people with companion animals in 2015.

This reflects recent findings from Euromonitor International (2014) that New Zealand consumers are becoming increasingly aware of the importance of providing a nutritionally adequate diet for their companion animals.

This is resulting in a trend towards higher pet food sales volumes and values, and higher sales volumes and values for other pet care products.

Euromonitor International data indicate the volume of pet food sold through the New Zealand retail sector has increased by about 7% from 2011 to 2014 to reach 97,756 tonnes worth $549 million last year.

This sector is forecast to further expand by 1.2% in 2015-16 to reach 99,000 tonnes worth $584 million.

Growth is then expected to plateau to a rate of 0.7% to 1% per annum from 2016-17 to 2018-19, when sales of pet food are expected to reach a retail value of $629 million.

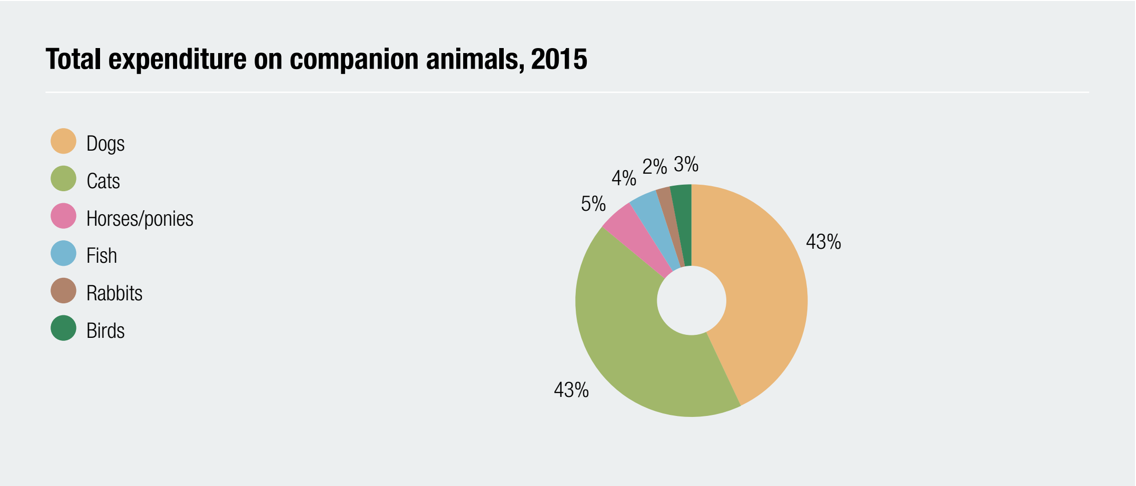

Fig 47

Looking at expenditure on healthcare products for companion animals, Euromonitor International estimates this increased by 28.7% from 2011 to 2015, with expenditure on dietary supplements increasing by an estimated 31% over the same period.

6.2 CATS

In 2015 New Zealanders are estimated to have spent $747 million on their cats, accounting for 42% of the total companion animal spend.

This is an increase of $71 million compared to 2011, when total expenditure on cats was $676 million. While cat numbers have declined slightly during this period, people who have cats are spending more on their animals in every expenditure category. It should be noted that while the total amount spent has increased, it remains a similar proportion of the total expenditure on all companion animals at 43%.

The 2015 survey identified that the average New Zealand cat-owning household spends $1,005 on their cats per year, or about $670 per animal (when households with multiple cats are taken into account).

This is an increase on 2011, when the annual average spend was $883 per household and $466 per animal.

Food makes up half (50%) of the total spend in 2015, down slightly from 59% in 2011.

In 2015, commercial dry cat food was the most popular type of food for cats (bought by 93% of households with cats), followed by commercial wet food (68%) and raw meat or chicken (33%) – with the bulk purchased from supermarkets.

The 2015 NZCAC survey shows that most cats (68%) see a vet every year, principally for vaccinations or an annual check-up.

Insurance costs were low in 2015, with the survey finding only 10% of cats are insured. The main reasons given for this were that people with cats do not see the value in insurance (54% of respondents) or it was too expensive (32% of respondents). While the proportion of cats insured is relatively low, this area has seen significant growth since 2011 with expenditure increasing by 250%.

Starting from a relatively low base in 2011, expenditure on clipping and grooming, registration and membership and training have all increased significantly. This is likely due to importance placed on companion animals and increased discretionary spending.

Estimated annual expenditure on cats per household, 2011 and 2015

Expenditure type	2011	2015	Change
Food	$496	$506	2%
Veterinary services	$195	$241	24%
Cat litter	$31	$53	71%
Boarding/minding	$35	$46	31%
Clothing/leads/bowls	$28	$39	39%
Healthcare products	$31	$34	10%
Insurance	$6	$21	250%
Clipping/grooming	$10	$17	70%
Registration/membership	$5	$14	180%
Training	$1	$5	400%
Anything else	~	$29	~
Total	$883	$1,005	14%

Fig 48

Household expenditure on cats, 2015

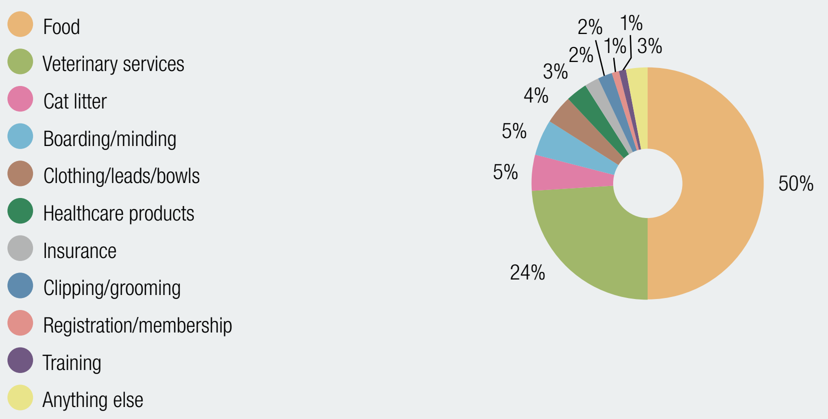

Fig 49

6.3 DOGS

In 2015, New Zealanders are estimated to have spent $797 million, up $45 million on the 2011 NZCAC survey estimate of $752 million. As with cats, while dog numbers have declined slightly since 2011, expenditure per household and total expenditure have increased.

In 2015 the average household is expected to spend $1,686 on their dogs, a 7% increase on the 2011 figure of $1,571.

The average spend per animal (taking into account households with multiple dogs) is estimated to be $1,200, which is up from $1,047 in 2011.

The main areas of expenditure remain food ($692 compared to $697 in 2011) and veterinary services ($403 compared to $393 in 2011).

Commercial dry dog food is the most popular food for dogs (bought by 88% of households with dogs), followed by table scraps/left-overs (50%) and raw meat or chicken (37%). Only 32% of dogs were estimated to be fed commercial wet food in cans, trays or tubs in 2015.

Supermarkets were the most popular outlets to purchase dry dog food in 2015 (73%), followed by pet stores (20%) and vets (15%).

Most owners (92%) bought wet food from a supermarket in 2015 (if they used it).

The 2015 NZCAC survey found most dogs (75%) see a vet each year, principally for vaccinations or an annual check-up.

While insurance spend on dogs per household in 2015 is relatively low compared to other categories of spending at $41 per head, it is considerably higher than the 2011 figure of $17.

Nearly one in five (19%) dog owners now have pet insurance; more than double the 2011 figure of 8%. The main reasons for not investing in insurance were perceived lack of value (44%) or perception it was too expensive (37%).

Expenditure on clothing, leads and bowls increased by an estimated 154% from 2011 to 2015, reflecting the importance placed on companion animals and increased discretionary spending on them.

Estimated annual expenditure on dogs per household, 2011 and 2015

Expenditure type	2011	2015	Change
Food	$697	$692	-1%
Veterinary services	$393	$403	3%
Registration/membership	$87	$110	26%
Boarding/minding	$94	$105	12%
Clothing/leads/bowls	$39	$99	154%
Clipping/grooming	$71	$96	35%
Healthcare products	$154	$61	-60%
Insurance	$17	$41	141%
Training	$19	$25	32%
Anything else	~	$54	~
Total	$1,571	$1,686	7%

Fig 50 | Source: NZCAC, 2011; Galaxy Research, 2011 and 2015.

Household expenditure on dogs, 2015

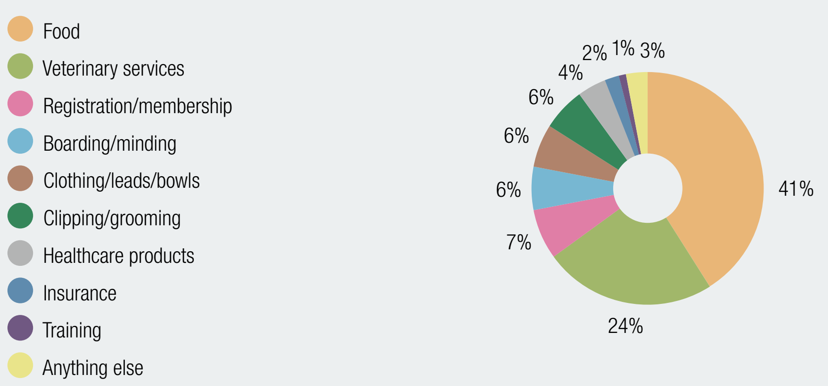

Fig 51

6.4 FISH

There are around 1.5 million fish being kept as companion animals in New Zealand, with the average fish-owning household having nine fish.

A combined total of $158 million is estimated to be spent on fish, birds and rabbits in 2015, making up 9% of New Zealand's annual companion animal expenditure.

Of this, total annual expenditure on fish alone was estimated at $67 million with the average expenditure per household at $398 per year.

The biggest expense area for fish owners is aquariums and equipment; with an average annual spend of $155 per household. This is followed by fish food at $122 and consumables such as water conditioner, medications, décor, and water quality test kits at $68.

The survey found annual expenditure on fish to be estimated at $38 million, with the average household spending $204 a year. This was

made up of expenditure of $90 on food, $78 on housing and $36 on other expenses.

Estimated annual expenditure on fish per household, 2015

Expenditure type	Amount
Aquarium and equipment	$155
Food	$122
Consumables	$68
Veterinary services	$12
Anything else	$41
Total	$398

Fig 52

Household expenditure on fish, 2015

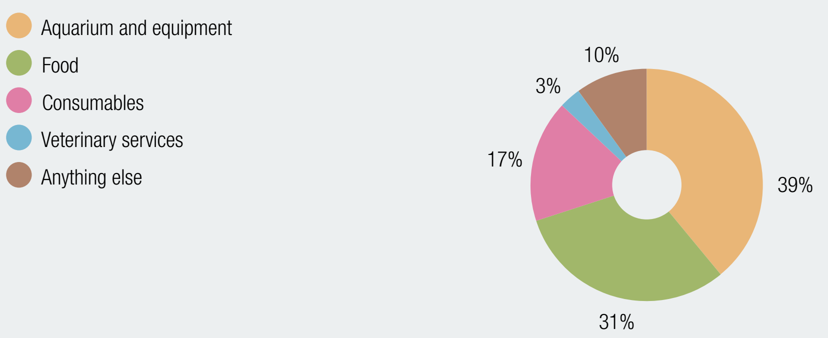

Fig 53

6.5 HORSES AND PONIES

Total expenditure on horses and ponies in 2015 is estimated to be $91 million, or 5% of the total spend on companion animals.

This is similar to 2011, when total expenditure on horses was $77.4 million, or 5% of all expenditure.

While total expenditure increased between 2015 and 2011, the average horse owner/household spent almost $200 less on their horses in 2015 (at $2,674), compared to 2011 (at $2,865).

With the average owner having three or four horses, this represented $785 per animal in 2015, down from $895 per animal in 2011.

'Healthcare products' was added as an expenditure area to the survey in 2015, which accounts for an apparent reduction in expenditure on veterinary costs. When expenditure on veterinary services and healthcare products is combined, this represents a 22% increase in expenditure on average per horse compared to 2011.

The overall reduction in average expenditure is attributed to lower spending on training, clothing/accessories, insurance (only 16% of survey respondents said they insured their horses, down on 18% in 2011) and registration/membership.

Expenditure on boarding and minding increased, while the amount spent on feed remained relatively unchanged.

Estimated annual expenditure on horses & ponies per household, 2015

Expenditure type	2011	2015	Change
Food	$788	$779	-1%
Veterinary services	$468	$277	22%
Healthcare products	~	$294	
Clothing/leads/bowls	$373	$265	-29%
Clipping/grooming	$128	$206	61%
Boarding/minding	$65	$206	217%
Training	$317	$199	-37%
Registration/membership	$143	$87	-39%
Insurance	$102	$48	-53%
Anything else	$481	$313	-35%
Total	$2,865	$2,674	-7%

Fig 54

Household expenditure on horses & ponies, 2015

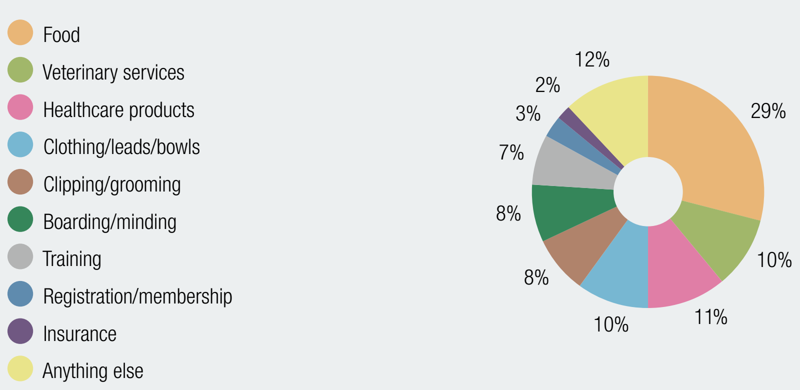

Fig 55

6.6 RABBITS

The estimated average expenditure on rabbits per household for this survey was $617 and the total annual expenditure for this sector was estimated at $36 million.

In 2011, the average expenditure per household was estimated to be $310 a year based on a condensed list of expenditure options. This comprised of $153 on food, $102 on cages/accommodation, and $55 on other expenses, with total annual expenditure across the sector estimated at $16 million.

A breakdown of the average spend per household with rabbits is outlined in the table below.

Estimated annual expenditure on rabbits per household, 2015

Expenditure type	Amount
Food	$173
Cages/housing	$155
Veterinary services	$84
Consumables	$81
Anything else	$124
Total	$617

Fig 56

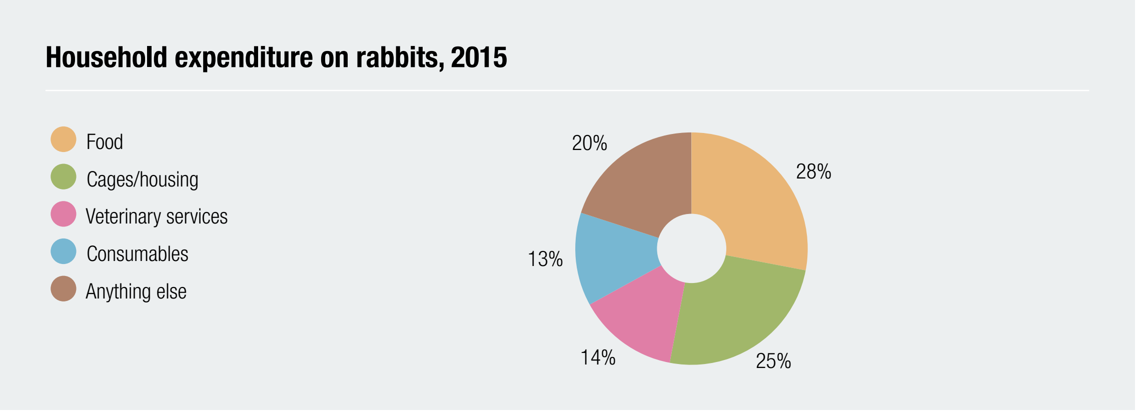

Fig 57

6.7 BIRDS

The average expenditure on birds per bird-owning household was $501, with the total annual expenditure for this sector estimated at $55 million. The biggest costs are food and cages/housing.

In 2011, annual expenditure on birds per household was estimated to be $395 a year, comprising of $214 on food, $100 on cages/accommodation and $81 on other expenses. Total expenditure across the sector was estimated to be $43 million.

Estimated annual expenditure on birds per household, 2015

Expenditure type	Amount
Food	$245
Cages/housing	$105
Consumables	$48
Veterinary services	$30
Anything else	$73
Total	$501

Fig 58

Household expenditure on birds, 2015

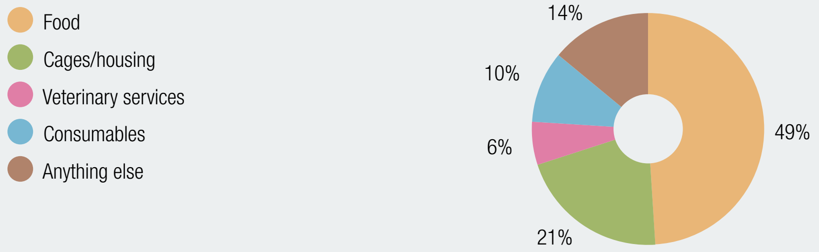

Fig 59

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Pet-n-Sur Exotic

07 Pet Food

7.1 TRENDS

Expenditure on pet food is estimated to be $787.3 million. Cat food accounts for nearly half of pet food expenditure, with expenditure on cat and dog food accounting for 88% of all pet food expenditure.

Total expenditure on pet food ($ millions), 2015

Animal type	Amount	Percentage of total
Cats	376.1	47%
Dogs	327.1	41%
Horses/ponies	26.5	3%
Fish	20.5	3%
Rabbits	10.1	1%
Birds	26.9	3%
Total	787.3	100%

Fig 60

People with companion animals place increasing value on the health and wellbeing of their animals and are also time poor. This has supported continued growth in both premium products and a focus on convenience (Euromonitor International, 2014).

There has been minimal growth in the value of pet food sold through supermarkets in recent years, with pet superstores increasing slightly in terms of value share due to the expansion of Animates. In addition, it is expected that mass merchandiser The Warehouse is likely to look to grow its share of pet food sales following its acquisition of internet retailer pet.co.nz (Euromonitor International, 2014).

Multi-national firms have continued to dominate the pet care space in recent years, supported by greater buying power and supply chain capabilities. Nestlé Purina PetCare New Zealand and Mars New Zealand accounted for 41% of total pet care value sales in New Zealand during 2013. Domestic pet care manufacturers focused on more specialised or niche products, such as pet supplements or fortified foods (Euromonitor International, 2014).

The major supermarket operators Progressive Enterprises and Foodstuffs have significant private label strategies designed to increase profit margins, which incorporate pet care. In line with health and wellness concerns, many private label products have transitioned from being economy to mid-priced based on consumer perception surrounding the quality of economy brands. Animates also maintains a private label offering and mass merchandiser, The Warehouse, is expected to follow suit (Euromonitor International, 2014).

Premiumisation is expected to continue to drive growth, with both consumer demand and new product developments set to continue to focus on premium segments (Euromonitor International, 2014).

7.2 CAT FOOD

7.2.1 Mix of foods fed to cats

Cat owners were asked what kinds of food they had fed their animals in the past month. A huge 93% of households feed their cats commercial dry cat food, with 68% feeding them commercial wet cat food. While these are by far the most popular choices for cat owners, a third (33%) also feed their cats fresh or raw meat. Slightly fewer (27%) give their cats leftover human food or table scraps. Around one in ten cat owners (11%) feed their animals commercial chilled cat food. A small percentage (3%) prepare food themselves specifically for their cats.

There are some interesting variations in what different groups of people choose to feed their cats. Those with a household income of under $40k per year provide the widest range of foods for their cats. Women are also more likely to provide a wider mix of food options, with more women feeding their cats commercial dry cat food, commercial wet cat food, and fresh or raw meat.

Gen Y are less likely to feed their cats commercial wet cat food (60%) and fresh or raw meat (27%), whereas Baby Boomers are much more likely to feed their cats these foods (71% and 38% respectively); with Gen X representing the average.

While commercial dry cat food is very popular (95%) amongst those with a Māori heritage, this group is less likely than the average household to feed their cats commercial wet cat food (55%) and more likely to feed them fresh or raw meat (41%), human leftovers or table scraps (38%), and commercial chilled cat food (26%). Commercial dry cat food (87%) and fresh or raw meat (17%) are least popular with households with a background other than NZ European or Māori.

Mix of food fed to cats in an average month

	Total	Gender		Generation			Household income			Ethnic group		
Food type	All	Men	Women	Gen Y 21-35	Gen X 36-51	Baby Boomer 52-70	<$40k	$40-$90k	$90k+	NZ Euro	Māori	Other
Commercial dry	93%	88%	97%	92%	94%	93%	97%	92%	94%	94%	95%	87%
Commercial wet	68%	64%	71%	60%	69%	71%	77%	67%	63%	69%	55%	60%
Fresh or raw meat	33%	30%	36%	27%	33%	38%	40%	28%	33%	35%	41%	17%
Leftover human food	27%	27%	26%	28%	28%	26%	29%	24%	28%	27%	38%	24%
Commercial chilled	11%	11%	11%	11%	12%	11%	16%	11%	10%	11%	26%	16%
Homemade for the cat	3%	3%	3%	4%	3%	1%	2%	2%	4%	2%	10%	10%
None of the above	0%	1%	~	1%	~	~	~	1%	~	0%	~	3%

Fig 61

Mix of food fed to cats in an average month

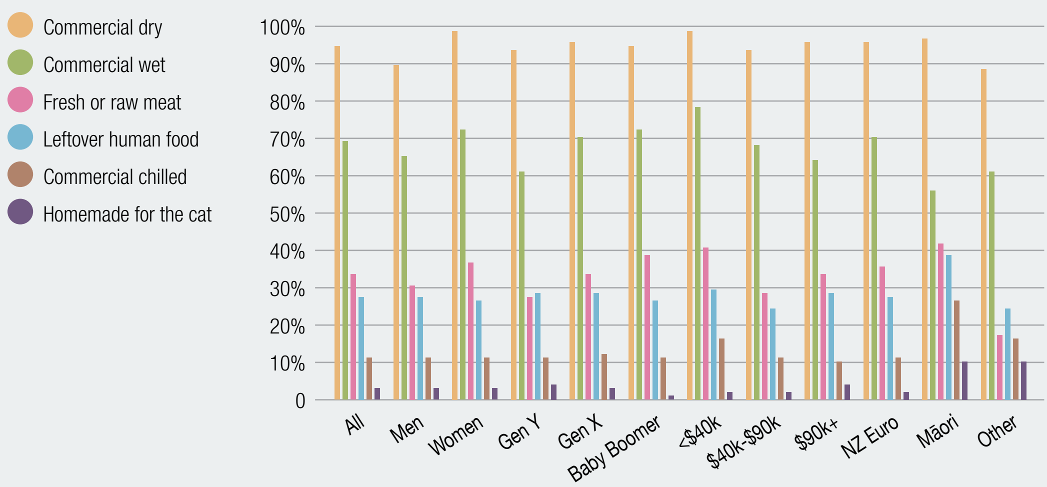

Fig 62 | *Gen Y: 21-35, Gen X: 36-51, Baby Boomer: 52-70

7.2.2 Where cat food is purchased

The vast majority of cat food is purchased from supermarkets. However, it is also clear that a noticeable number of cat owners favour pet stores and veterinarians when it comes to buying dry cat food. This is likely accounted for by the popularity of specialist premium dry cat foods such as Science Diet and Eukenuba. These dry cat foods tend to be for specific life stages (kitten, adult, senior etc.) or health and wellbeing needs (oral health, weight management etc.).

Where cat food is purchased

	Dry cat food	Wet cat food
Supermarket	86%	95%
Pet store	13%	5%
Veterinarian	13%	4%
Variety store (Kmart, The Warehouse etc.)	7%	3%
Internet/online	2%	1%
Rural Merchandiser (PGG, CRT, RD1 etc.)	2%	1%
Somewhere else	1%	1%

Fig 63

Buying behaviour is largely consistent across the demographics, with a few notable variations. Women are more than one and half times more likely than men to buy dry cat food from the vet (15% versus 9%). Baby Boomers (17%) are also much more likely than Gen Y (12%) and Gen X (9%) to get their dry cat food from a vet. Interestingly, in Wellington fewer people (77%) get their dry cat food from a supermarket, favouring pet stores (19%) instead.

As might be expected, households earning under $40k per year are more budget conscious, with a higher percentage (93%) getting their dry cat food from the supermarket and fewer choosing to get it from a pet store (7%) or veterinarian (10%). The reverse is true for households earning more than $90k per year, with 78% getting their dry cat food from the supermarket, 21% at pet stores and 17% from the vet. Households with Māori heritage are more likely than the average to get their dry cat food from variety stores (15%) and pet stores (20%), and less likely from the supermarket (80%).

Where dry cat food is purchased

	Sex		Location				Generation			Household income			Ethnic group		
Channel	Male	Female	Auckland	Wellington	Other North Island	South Island	Gen Y 21-35	Gen X 36-51	Baby Boomer 52-70	<$40k	$40k-$90k	$90k+	NZ Euro	Māori	Other
Supermarket	88%	84%	85%	77%	90%	85%	85%	87%	85%	93%	89%	78%	86%	80%	89%
Variety store (Kmart, The Warehouse etc.)	5%	8%	8%	3%	8%	6%	8%	6%	6%	9%	7%	4%	6%	15%	15%
Rural Merchandiser (PGG, CRT, RD1 etc.)	1%	2%	~	2%	1%	4%	1%	2%	2%	3%	1%	2%	2%	~	~
Pet store	13%	13%	17%	19%	8%	11%	12%	14%	12%	7%	9%	21%	12%	20%	13%
Veterinarian	9%	15%	13%	14%	12%	12%	12%	9%	17%	10%	11%	17%	13%	7%	8%
Internet/online	1%	2%	2%	3%	1%	2%	3%	2%	1%	1%	1%	3%	2%	~	2%
Somewhere else	2%	1%	1%	~	1%	1%	~	2%	~	2%	1%	2%	1%	3%	2%

Fig 64

7.2.3 Market share by price point

From 2011 to 2015 both value and volume sales of dry cat food are estimated to have decreased for the economy and mid-priced segments, with the premium segment's share of the market increasing by 15% in volume terms and 11% in value terms.

Volume sales of dry cat food

Price point	2011	2015
Economy	13%	11%
Mid-priced	60%	59%
Premium	27%	31%

Fig 65

Value sales of dry cat food

Price point	2011	2015
Economy	5%	4%
Mid-priced	38%	34%
Premium	57%	63%

Fig 67

Volume sales of dry cat food (2015)

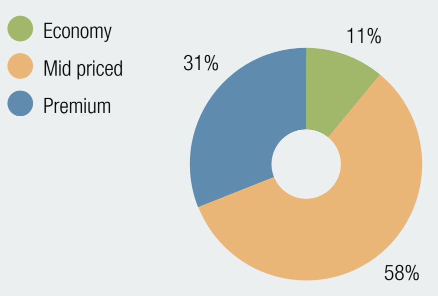

Fig 66

Value sales of dry cat food (2015)

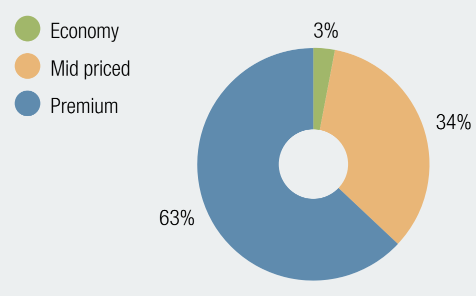

Fig 68

A similar trend is seen with wet cat food, with volume and value sales of the economy and mid-priced segments both decreasing over the four years, with the premium segment's share of the market increasing by 17% in volume terms and 18% in value terms.

Volume sales of wet cat food

Price point	2011	2015
Economy	14%	13%
Mid-priced	74%	72%
Premium	12%	14%

Fig 69

Value sales of wet cat food

Price point	2011	2015
Economy	7%	6%
Mid-priced	59%	53%
Premium	34%	40%

Fig 71

Volume sales of wet cat food (2015)

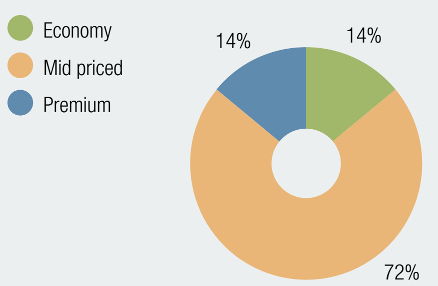

Fig 70

Value sales of wet cat food (2015)

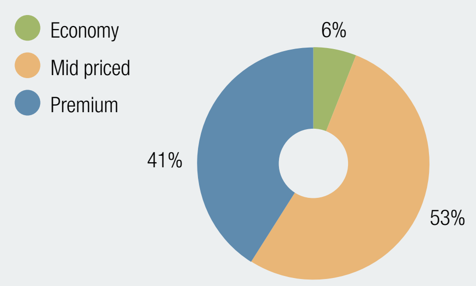

Fig 72

7.3 DOG FOOD

7.3.1 Mix of foods fed to dogs

Unlike cat food, which is clearly dominated by commercial dry and wet food, there is a lot more variation in dog food. Overall, commercial dry dog food is by far the most popular, fed to 88% of dogs in an average month. The second most popular is leftover human food or table scraps, which is fed to half of all dogs in any given month. Also proving popular are fresh or raw meat (37%), commercial wet dog food (32%), and commercial chilled food (31%). 13% of dog owners prepare homemade food specifically for their animals.

Unlike cats, there is little variation between what men and women feed their dogs.

People with Māori heritage are most likely to give their dogs the widest range of foods during any given month.

Baby Boomers are also likely to feed their dogs a wide range of foods, and while they are less likely than the average to choose commercial wet dog food (28%), they are more likely to feed them commercial chilled (38%), fresh or raw meat (44%), and human leftovers or table scraps (56%). In contrast, Gen X tend to favour commercial wet dog food (37%), as do chose with children under 18 years (36%), for which there is likely a strong overlap.

Dog owners in Wellington (74%) are nearly twice as likely as those living in Auckland (38%) to feed their animals leftovers or table scraps. Commercial chilled dog food is least popular in Auckland (23%) and most popular in the South Island (36%).

Feeding dogs fresh or raw meat is most popular with those in rural and regional areas (52%) and those who have Māori heritage (55%).

Households earning under $40k per year are less likely to favour commercial wet food (26%) and more likely to make food specifically for their dogs themselves (22%).

Mix of food fed to dogs in an average month

	Total	Gender		Generation			Household income			Ethnic group		
	All	Male	Female	Gen Y 21-35	Gen X 36-51	Baby Boomer 52-70	<$40k	$40-$90k	$90k+	NZ Euro	Māori	Other
Commercial dry	88%	88%	88%	86%	92%	86%	89%	87%	87%	89%	90%	82%
Leftover human food	50%	49%	52%	47%	51%	56%	51%	53%	47%	52%	55%	36%
Fresh or raw meat	37%	37%	37%	31%	39%	44%	39%	36%	37%	36%	55%	36%
Commercial wet	32%	33%	30%	33%	37%	28%	26%	35%	34%	30%	41%	38%
Commercial chilled	31%	28%	33%	25%	33%	38%	33%	35%	37%	31%	41%	29%
Homemade for the dog	13%	12%	13%	11%	12%	13%	22%	11%	11%	10%	24%	24%
None of the above	1%	1%	0%	2%	1%	~	~	1%	1%	1%	~	3%

Fig 73

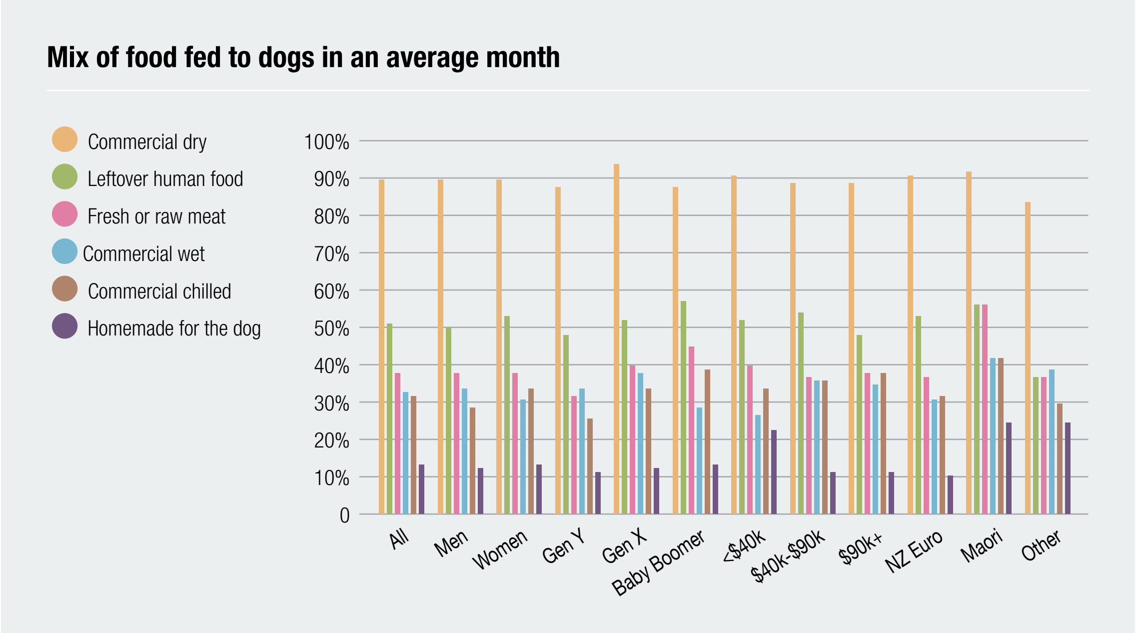

Fig 74 | *Gen Y: 21-35, Gen X: 36-51, Baby Boomer: 52-70

7.3.2 Where dog food is purchased

Supermarkets are by far the most popular place for dog owners to buy commercially produced dry (73%) and wet (92%) dog food.

As with cats, a reasonable proportion of dog owners are buying dry dog food from pet stores (20%) and veterinarians (15%). This is also likely due to the popularity of premium specialised dry dog food options, which are available through these channels. Compared to cat owners, more dog owners source wet dog food from pet stores (13%).

Where dog food is purchased

	Dry dog food	Wet dog food
Supermarket	73%	92%
Pet store	20%	13%
Veterinarian	15%	3%
Variety store (Kmart, The Warehouse etc.)	7%	4%
Rural Merchandiser (PGG, CRT, RD1 etc.)	6%	3%
Internet/online	6%	2%
Somewhere else	2%	1%

Fig 75

Supermarkets are more popular for buying dry dog food amongst those with a background other than NZ European or Māori (87%), of Māori heritage (85%), with children under 18 (80%), households earning between $40k and $90k per year (79%), Gen X (79%), and people working part time (79%). They are least popular with Baby Boomers (63%), people who do not have children under 18 (68%), those not working (69%), people who are not married (69%), and those earning more than $90k per year (69%).

Pet stores are most popular for buying dry dog food with those of Māori heritage (34%), people living in Auckland (30%), households earning more than $90k per year (28%), those in suburban areas (24%), and Gen Y and Baby Boomers (both 23%). They are least popular with households earning under $40k per year (9%), people in rural and regional areas (12%), those who are not working (15%), and Gen X (16%).

Veterinarians are most popular for buying dry dog food with Baby Boomers (19%), those earning over $90k per year (19%), and those on the North Island outside of Auckland and Wellington (18%). They are least popular with people from a background other than NZ European or Māori (6%), Gen X (9%), those in Wellington (10%), and those earning $40k-$90k per year (10%).

Where dry dog food is purchased

Channel	Sex		Location				Generation			Household income			Ethnic group		
	Male	Female	Auckland	Wellington	Other North Island	South Island	Gen Y 21-35	Gen X 36-51	Baby Boomer 52-70	<$40k	$40k-$90k	$90k+	NZ Euro	Māori	Other
Supermarket	72%	73%	70%	74%	76%	70%	76%	79%	63%	75%	79%	69%	70%	85%	87%
Variety store (Kmart, The Warehouse etc.)	8%	5%	6%	~	7%	11%	7%	4%	9%	5%	8%	6%	6%	8%	11%
Rural Merchandiser (PGG, CRT, RD1 etc.)	7%	5%	2%	8%	8%	10%	6%	4%	9%	13%	7%	6%	6%	15%	2%
Pet store	22%	18%	30%	21%	12%	18%	23%	16%	23%	9%	22%	28%	19%	34%	24%
Veterinarian	13%	17%	13%	10%	18%	15%	17%	9%	19%	16%	10%	19%	17%	11%	6%
Internet/online	6%	6%	7%	10%	4%	7%	9%	5%	4%	6%	4%	7%	6%	8%	9%
Somewhere else	2%	2%	2%	~	4%	2%	1%	2%	5%	2%	3%	2%	2%	~	2%

Fig 76

7.3.3 Market share by price point

From 2011 to 2015 both value and volume sales of dry dog food are estimated to have decreased for the economy and mid-priced segments, with the premium segment's share of the market increasing by 15% in volume terms and 8% in value terms.

Volume sales of dry dog food

Price point	2011	2015
Economy	5%	4%
Mid-priced	69%	66%
Premium	26%	30%

Fig 77

Value sales of dry dog food

Price point	2011	2015
Economy	2%	1%
Mid-priced	47%	43%
Premium	52%	56%

Fig 79

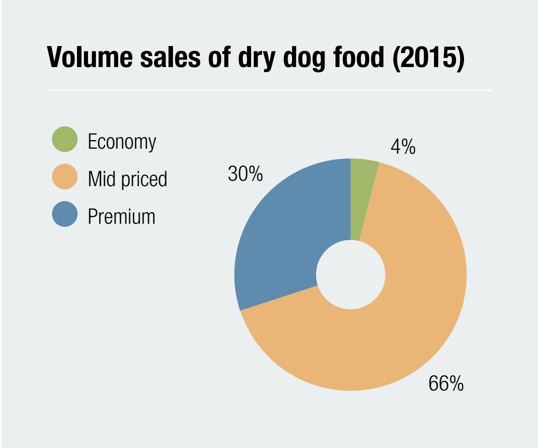

Fig 78

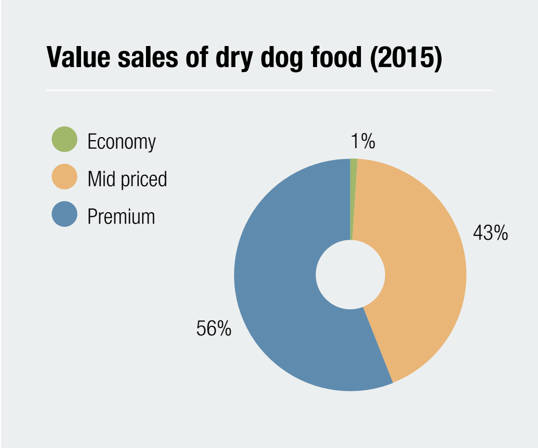

Fig 80

A similar trend is seen with wet dog food, with volume and value sales of the economy and mid-priced segments both decreasing over the four years, with the premium segment's share of the market increasing by an estimated 29% in volume terms and 18% in value terms.

Volume sales of wet dog food

Price point	2011	2015
Economy	25%	22%
Mid-priced	60%	60%
Premium	14%	18%

Fig 81

Value sales of wet dog food

Price point	2011	2015
Economy	10%	8%
Mid-priced	51%	46%
Premium	39%	46%

Fig 83

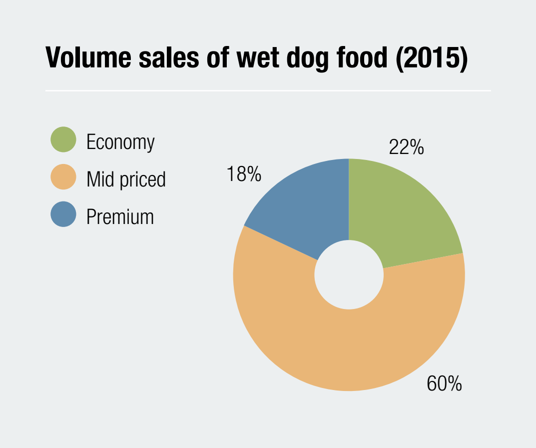

Fig 82

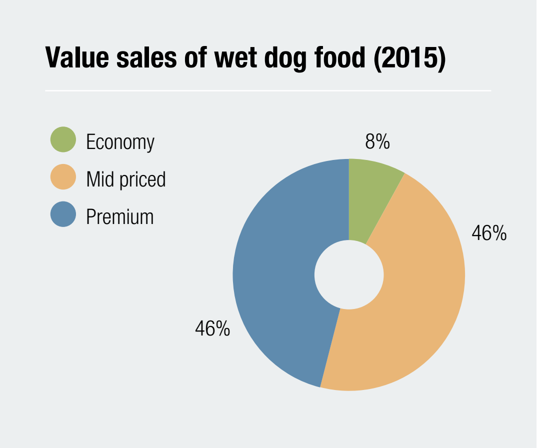

Fig 84

7.4 OTHER PET FOOD

From 2011 to 2015, the volume of bird food sold has increased by an estimated 20%, corresponding to an estimated 28% increase in the value of bird food sales (Euromonitor International, 2014).

The volume of fish food sold has also increased over this period, up by an estimated 6%, with the value of fish food sold increasing by an estimated 11% (Euromonitor International, 2014).

For small mammal and reptile food, the volume of food sold increased by an estimated 5%, with the value increasing by an estimated 25% (Euromonitor International, 2014).

Pet-n-Sur

08 Pet Care

8.1 PET CARE PRODUCTS

8.1.1 Trends

The vast majority of people who have companion animals view them as members of the family. As such, many trends seen in human wellness and wellbeing are mirrored in pet care.

The easing of consumer spending pressures and increasing consumer discretionary spending has allowed consumers to spend more on products and services for their animals. Retailers such as Animates have seen an increase in the sales of toys, treats, premium foods, and clothing in recent years.

In line with this, the range of pet care products has been expanding. This has included an increase in specialised products and those that target specific health issues such as dietary supplements and dry food formulated for oral care (Euromonitor International, 2014).

This has seen an increase in the number of both traditional specialty "bricks and mortar" and online stores, as well as the number of retailers introducing or developing their pet care offerings. Notably, home improvement retailer Mitre 10 introduced a pet care product range in late 2014. (Euromonitor International, 2014)

Major pet retail stores, such as market leader Animates, have both physical and online stores to meet the evolving needs and spending habits of consumers. As the 2015 New Zealand Companion Animal Survey found, a third of people have purchased products for their animals online.

The main healthcare products purchased for cats and dogs continued to be treatments for internal and external parasites such as fleas, ticks and worms. Although treatments are available through supermarkets, many people consider premium products available through pet and veterinary channels to be more effective. (Euromonitor International, 2014)

Dietary supplements for companion animals have performed strongly in the market place in recent years. The use of dietary supplements mirrors the trend seen in human health, with people shifting their focus from the treatment to the prevention of illness. Dietary supplements are therefore becoming more widespread and increasingly sophisticated. (Euromonitor International, 2014)

Looking ahead, the emergence of private label products is expected to impact the overall value of pet product sales. In particular, private label products are expected to drive price competition for cat litter. It is anticipated that this will also be impacted by supermarkets expanding their offerings and focusing on driving volume sales at the expense of retail sales margins. (Euromonitor International, 2014)

Pet care is expected to mimic trends in consumer health, with people placing increasing importance on keeping their animals healthy. As such, the popularity of pet healthcare is expected to continue to grow. (Euromonitor International, 2014)

8.1.2 Market leaders

In 2010 Bayer AG acquired the Auckland-based Bomac Group, which was previously New Zealand's largest privately owned animal health company manufacturing more than 290 production animal, equine, and companion animal products for sale domestically and overseas. This included the BomaZeal range of pet dietary supplements. (Euromonitor International, 2014)

In 2013 Bayer New Zealand was the leading player in pet products in the country, accounting for around 25% of value sales. Contributing significantly to its market share has been the company's leading pet healthcare brand, Advantage. The brand is well established and enjoys significant brand recognition among target consumers, accounting for 34% of pet healthcare product sales in 2013. The company's Bomac brand ranked second in pet dietary supplements, accounting for 13% of the market in 2013. (Euromonitor International, 2014)

Masterpet Corp ranked second in the pet products market in 2013, with its market share estimated at 16%. Although mainly competing in the mid-priced segment, Masterpet offers a wide range of other pet products under various brands, including Pet Team (exclusive to The Warehouse). The Pet Team range includes pet accessories and pet healthcare products. While Bayer New Zealand and Merial Ancare NZ offer the leading premium brands within pet healthcare, Masterpet Corp possesses the leading pet healthcare brand within supermarkets (Vitapet). Vitapet offers a more cost effective range of flea and worm solutions. Masterpet Corp was also the leading player in cat litter, accounting for an estimated 50% of the market in 2013. (Euromonitor International, 2014)

Merial Ancare NZ ranked third in pet products in 2013, with a market share of 9%. The company owes this position to its Frontline pet healthcare brand, which ranked third overall. Frontline is sold in pet shops, pet superstores and veterinary clinics nationwide. (Euromonitor International, 2014)

Animates is the largest pet product retailer in New Zealand, with 37 store locations across the country. It was also the most prominent

private label player in 2013 (Euromonitor International, 2014). In addition to a wide range of pet food and products, sold both instore and online, the company has expanded its offering to include a number of pet care services. These include veterinary care at both Animates vet care locations and veterinary partners, puppy school courses, pet grooming, do it yourself dog washes, pet insurance, and a pet adoption partnership with the SPCA that has seen over 8,000 animals rehomed. In addition to these services the company has introduced 'Animates Angels', which is aimed at shifting perceptions around special needs animals and has seen 30 special needs cats rehomed.

Dietary supplements were the biggest growth area in pet care products in 2013, with sales increasing by 15%. Local company VitaPower accounted for 40% of the market, with its strong performance was led by the My Beau range of products (particularly My Beau Senior and My Beau Bone & Joint). (Euromonitor International, 2014)

8.1.3 Expenditure

Given that companion animals play such an important role in the lives of New Zealanders, the growing range of products available for them is not surprising.

People with cats, dogs and horses spent an estimated $84.8m on products such as clothing, leads, bowls and toys for their animals in the past year. Those with fish, rabbits and birds spent an estimated $46.7m on equipment and housing for their animals in the past year.

The second largest area of expenditure for cats, dogs and horses is healthcare products, with a combined expenditure of $64.1m.

For people with cats, the single biggest area of expenditure is cat litter, totalling an estimated $39.4m a year. Given 96% of cats spend time indoors, cat litter represents a staple expenditure item for most cat owners.

People with fish, rabbits and birds spent an estimated $21.4m on consumables such as pH water testers and litter in the past year.

Total annual expenditure on pet care products ($ million), 2015

Expenditure type	Cats	Dogs	Horses/ponies	Fish	Rabbits	Birds
Cat litter	39.4	~	~	~	~	~
Clothing/leads/bowls etc.	29.0	46.8	9.0	~	~	~
Healthcare products	25.3	28.8	10.0	~	~	~
Cages/housing (aquariums/equipment)	~	~	~	26.1	9.0	11.5
Consumables	~	~	~	11.4	4.7	5.3
Total	93.7	75.6	19.0	37.5	13.8	16.8

Fig 85

8.2 VETERINARY SERVICES

8.2.1 Overview of the veterinary industry

According to the Veterinary Council of New Zealand's (VCNZ) most recent analysis of the veterinary workforce, there were 2,608 practicing veterinarians at 30 June 2013. This figure is based on the VCNZ's 2012-2013 workforce survey, which had a 96% response rate.

In 2013 there were 59 veterinarians per 100,000 people, a 3.5% increase on the previous year and a 9.3% increase compared to 2007.

Veterinary industry workforce, 2007–2013

	2007	2008	2009	2010	2011	2012	2013
Size of the workforce[1]	2,275	2,312	2,360	2,392	2,425	2,521	2,608
Vets per 100,000 population[2]	54	54	55	55	55	57	59
Percent IVG FTEs[3]	~	~	27	28	28	28	28
Percent women FTEs[4]	~	~	42	43	43	45	47
Percent specialist FTEs	~	~	~	2.7	2.6	2.9	3.0
Median age (years)	~	~	43	43	43	43	43
Average routine work hours[5]	~	~	42	42	41	41	41

Fig 86

[1] Number of practicing veterinarians with an Annual Practicing Certificate on 30 June of respective year.

[2] Population counts from Statistics New Zealand.

[3] IVG: international veterinary graduates.

[4] Number of women FTEs divided by the total number of practicing veterinarian FTEs.

[5] Average routine work hours per week, includes activities carried out as a veterinarian during business hours as well as veterinary work done while on call.

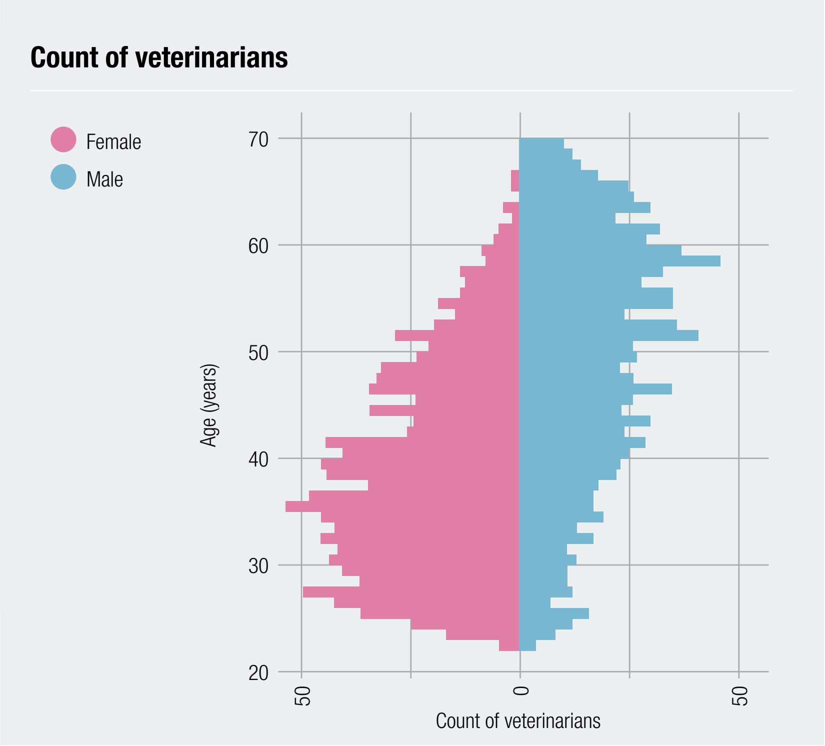

Fig 87

The New Zealand Veterinary Nursing Association has over 700 members in veterinary practices across the country (New Zealand Veterinary Nursing Association, 2015), up from the 650 reported in 2011.

There is an interesting shift in the gender and age distribution of the veterinary workforce, with men representing a greater proportion of the workforce in the older age groups, and women representing a greater proportion in the younger age groups.

In 2013, 59% of women in the workforce were under age 40 compared to 23% of men. 14% of women in the workforce were over the age of 50, compared to 51% of men. (Veterinary Council of New Zealand, n.d.)

Most veterinarians (70%) are in clinician roles, with a further 13% in technical roles. Roughly even numbers (6%) are in education or manager positions, with 4% working as consultants.

Practicing veterinarians by work role, 2008–2012

Workforce role	2008	2009	2010	2011	2012
Clinician	1,382	1,547	1,481	1,525	1,499
Technical	304	281	265	296	291
Education	60	71	55	107	130
Manager	146	109	139	143	122
Consultant	72	87	93	95	83
Other	26	36	30	26	21
Not stated	5	-	-	-	-
Total	1,993	2,130	2,063	2,182	2,146

Fig 88 | Source: Veterinary Council of New Zealand, n.d.

Practicing veterinarians by work role, 2012

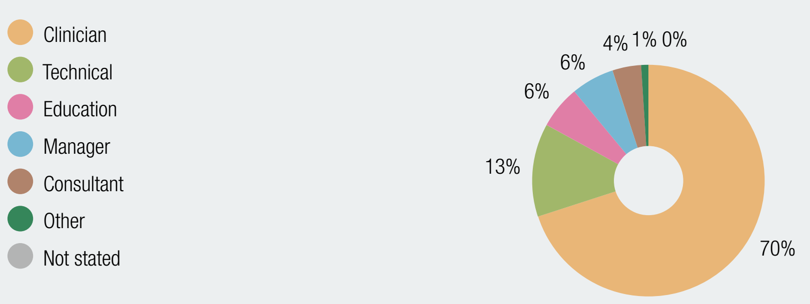

Fig 89

The table below shows the breakdown of practicing veterinarians by work type. Veterinarians working in the agriculture sector are included for reference and comparison.

Practicing veterinarians (FTE) by work type, 2008–2012

Work type	2008	2009	2010	2011	2012
Companion animals	792	782	789	773	757
Equine	153	164	153	163	145
Dairy cattle	349	286	297	307	319
Regulatory	225	253	250	277	257
Mixed animal practice	67	238	192	244	234
Miscellaneous	127	124	115	158	185
Large animals	32	113	102	95	101
Practice management	71	62	67	74	67
Other	104	62	44	37	38
Small ruminants	30	15	16	18	15
Beef cattle	38	21	26	23	20
Monogastric	8	9	11	10	7
Total	1,993	2,127	2,063	2,179	2,145

Fig 90 | Source: Veterinary Council of New Zealand, n.d.

35% of veterinarians work specifically with companion animals, and a further 7% with horses. 11% are in a mixed animal practice and 3% are in a practice management role.

Practicing veterinarians by work type, 2012

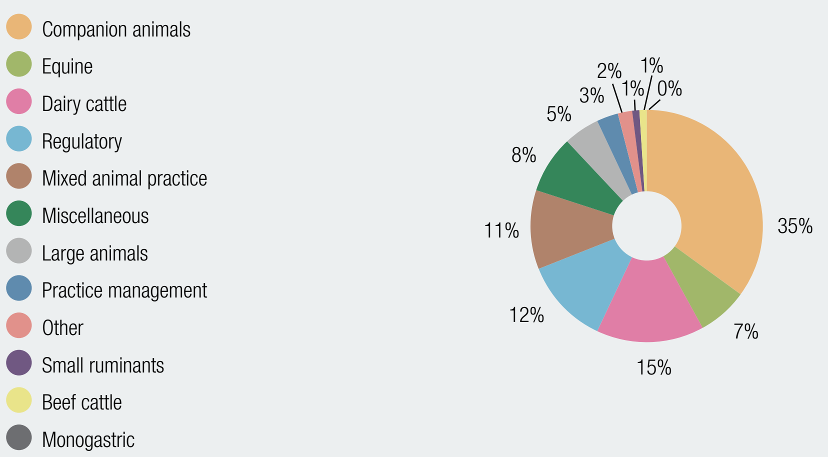

Fig 91

8.2.2 Veterinary visits

In the past year 64% of cats and 82% of dogs have been to the vet at least once. On average, cats go to the vet 1.3 times per year, and dogs 1.7 times per year.

Vet visitation rates (at least one visit in the past year) for cats are lowest in households earning under $40k per year (55%); compared to 68% for households earning over $90k.

Wellington has the highest vet visitation rate for cats at 70%. In contrast 59% of cats in rural and regional areas have been to the vet in the past year.

While dogs are more likely to have been to the vet in the past year, similar demographic trends are observed. Visitation rates range from 75% for households earning under $40k per year to 90% for those earning over $90k per year.

Auckland has the highest visitation rate for dogs at 87%, compared to rural and regional areas at 71%.

Cats (38%) and dogs (37%) are most likely to go to the vet once a year, with 22% of dogs and 13% of cats going twice a year.

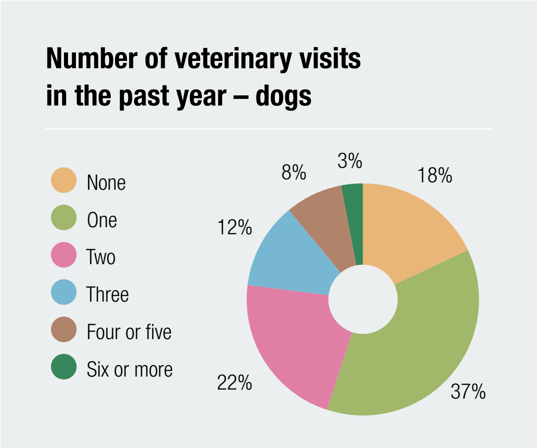

Fig 92

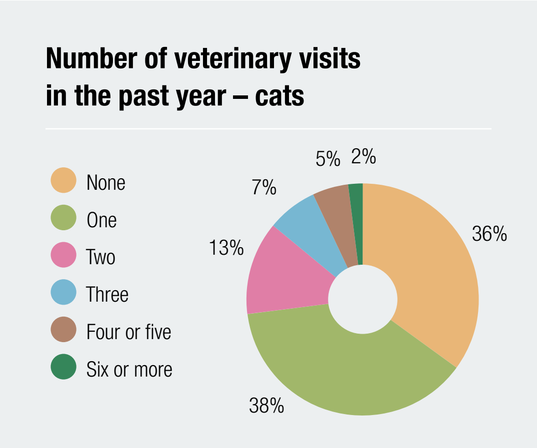

Fig 93

For animals that have been to the vet in the past year, the most likely reason is for an annual check-up and/or vaccinations. 75% of dogs and 68% of cats that have been to the vet in the past year have been taken for this reason. The second most likely reason is specific health issues/needing to consult with a vet.

Ponies/horses and rabbits are more likely to visit the vet for desexing than other animal types. This is possibly due to cats and dogs being desexed by the time they are bought or adopted. Generally, a little over 10% of veterinary visits are due to emergencies and accidents.

A significant 80% of people from a background other than NZ European or Māori have taken their cats to the vet for an annual check-up and vaccinations in the past year. Gen X (71%) are far more likely than Gen Y (62%) to take their cats to the vet for an annual check-up and vaccinations, with Baby Boomers close to the average at 66%.

Baby Boomers (81%) and Gen X (78%) are much more likely than Gen Y (69%) to take their dogs to the vet for an annual check-up and vaccinations.

Reasons for veterinary visits in the past year

Reason	Dogs	Cats	Horses/ponies	Rabbits
Vaccinations/annual check-up	75%	68%	47%	47%
Specific health issues/ needed to consult vet	45%	35%	21%	40%
Desexing	13%	15%	37%	~
Microchipping	12%	9%	10%	~
Emergency/accident	12%	12%	11%	13%
Some other reason	1%	3%	5%	7%

Fig 94

Around one in three cats (36%) and one in five dogs (18%) have not been to the vet in the past year. Far and above the most common reason for not taking animals to the vet is that they have not been sick so people have not seen it as being necessary. 94% of people with dogs and 90% of people with cats gave this reason for not taking their animals to the vet. This would indicate that these people do not see annual check-ups and vaccinations as being necessary.

Reasons for not taking animals to the vet in the past year

Reason	Dogs	Cats	Horses/ponies	Rabbits	Birds	Fish
Was not sick/not necessary	94%	90%	88%	91%	94%	85%
Cost/too expensive	18%	14%	12%	9%	14%	5%
There is not a vet near where I live	1%	1%	~	2%	~	1%
Accessibility/it is difficult for me to take my pet to the vet	3%	3%	~	1%	~	4%
Some other reason	1%	3%	~	5%	3%	10%

Fig 95

8.2.3 Expenditure on veterinary services

Visits to the vet represent one of the most significant areas of expenditure for households with companion animals, particularly for cats, dogs, horses and ponies.

It is estimated that $389.3m was spent on veterinary services for companion animals in the past year. This is an increase of 8.7% or $31.3m compared to 2011. 95% of expenditure is on cats and dogs, with a relatively even split between the two.

Total annual expenditure on pet care services ($ million), 2015

Expenditure type	Dogs	Cats	Horses/ponies	Rabbits	Birds	Fish	Total
Veterinary services	190.5	179.1	9.4	4.9	3.3	2.0	389.3

Fig 96

Expenditure on veterinary services

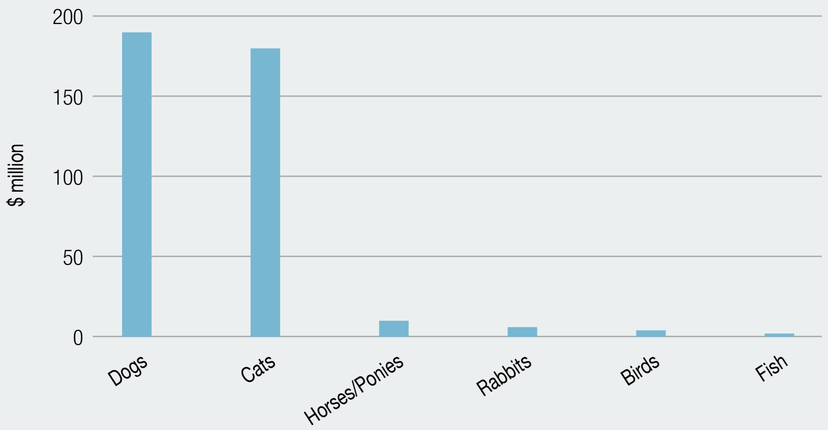

Fig 97

8.3 OTHER PET CARE SERVICES

New Zealanders spend an estimated $242.8m a year on other companion animal services, an increase of 19% compared to 2011.

Overall, the biggest area of expenditure is boarding, minding, day care and walking services, which account for 37% of expenditure. This was followed by registration and membership at 27%. By far the biggest growth area over the past four years is pet insurance, which saw expenditure increase by 133% from $15.7m to $36.6m.

Total annual expenditure on other pet care services

Expenditure type	2011		2015		% change
	$ million	% of total	$ million	% of total	
Boarding/minding/day care/walking	75.0	37%	90.8	37%	21%
Registration/membership	49.6	24%	65.4	27%	32%
Insurance	15.7	8%	36.6	15%	133%
Clipping/grooming	45.5	22%	27.7	11%	-39%
Training	18.5	9%	22.3	9%	21%
Total	204.3	100%	242.8	100%	19%

Fig 98

Expenditure on other pet care services, 2015

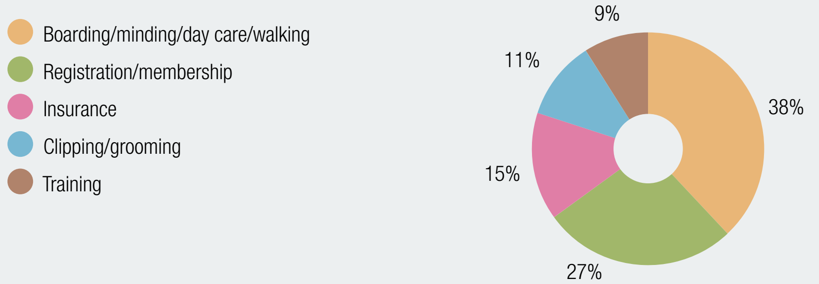

Fig 99

8.3.1 Boarding, minding, day care and walking

Around a third of households with dogs (32%) and horses (31%) have used boarding, minding, walking, and day care services in the past year. While somewhat lower, nearly one in five households with cats (19%) have used these services.

Many companies offer multiple services to meet customer needs. For example, pet minding companies often offer dog walking services for people with busy schedules or for those who are out of town. In recent years day care centres, particularly for dogs, have become increasingly popular. Some companies also offer a pick up and drop off service.

From 2011 to 2015, expenditure on these services increased by 21% from $75m to $90.8m. In 2015, dogs account for 55% or $49.6m of this expenditure; with cats accounting for 38% or $34.2m.

Annual expenditure on boarding, minding, day care and walking

Animal type	2011		2015		% change
	$ million	% of total	$ million	% of total	
Cats	28.2	38%	34.2	38%	21%
Dogs	45.0	60%	49.6	55%	10%
Horses/ponies	1.8	2%	7.0	8%	289%
Total	75.0	100%	90.8	100%	21%

Fig 100

8.3.2 Clipping and grooming

Pet grooming is frequently offered alongside other pet care services such as day care and boarding or minding. Mobile and do it yourself (DIY) grooming services are also popular as they offer a convenient service for people with a busy lifestyle.

Overall, 16% of households with cats spent $12.6m on clipping and grooming over the past year. As might be expected, a far higher proportion of households with dogs (47%) spent money on clipping and grooming, totalling $8m. This is lower than the estimated expenditure in 2011 and is possibly due to a combination of a decrease in the dog population and an increase in the use of DIY services.

Expenditure on clipping and grooming services for horses and ponies is estimated to have doubled in the past four years. This is in part attributed to the 33% increase in the number of horses and ponies.

Annual expenditure on clipping and grooming

Animal type	2011		2015		% change
	$ million	% of total	$ million	% of total	
Cats	8.1	18%	12.6	46%	56%
Dogs	34.0	75%	8.0	29%	-76%
Horses/ponies	3.5	8%	7.0	25%	100%
Total	45.5	100%	27.6	100%	-39%

Fig 101

8.3.3 Training

Training can be an invaluable service for many dog owning households. Training varies by company and by trainer, with courses ranging from beginner lessons for puppies through to more advanced training programs.

Training can be undertaken in group classes, which help with socialisation for dogs, one-on-one training for a more dedicated approach, or in-home training for more specific behavioural problems.

Companies such as Animates have expanded their product and service offering to include training programs.

Nearly one in five households with dogs (19%) spent an estimated $11.8m on training for their animals in the past year. This is up from 15% and $9.1m in 2011, representing a 30% increase in expenditure.

There has been a significant increase in the estimated amount of money spent on training for cats in the past four years, up from $800k to $3.7m.

Annual expenditure on training

Animal type	2011		2015		% change
	$ million	% of total	$ million	% of total	
Cats	0.8	4%	3.7	17%	363%
Dogs	9.1	49%	11.8	53%	30%
Horses/ponies	8.6	46%	6.8	30%	-21%
Total	18.5	100%	22.3	100%	21%

Fig 102

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09 Education

A number of educational programs involving companion animals are run throughout New Zealand for children and for the betterment of the broader community.

The SPCA undertakes educational programs to teach compassion and responsible behaviour towards animals, and help people to recognise that all creatures matter, not just those we regard as cute, friendly, or economically beneficial.

Education programs run in local communities by SPCA centres in Auckland, Wellington, Canterbury and Otago are tailored to suit a range of ages.

In a new initiative, SPCA Auckland has developed an animal welfare education program designed to integrate into the New Zealand school curriculum. Pilot programs have been conducted with Auckland schools to fine-tune the new education resources, which are anticipated to be available to teachers nationwide in 2016.

These programs will give animal welfare a real-life, meaningful context to apply and learn school subjects through. The resources will:

- Develop students' core values
- Support teaching and learning of the New Zealand Curriculum Learning Areas
- Support citizenship education
- Develop students' knowledge and understanding of animal welfare concepts
- Support students' social and emotional development

9.1 YOUTH AT RISK

The SPCA has been working with Child, Youth and Family (CYF) to deliver a successful special empathy building program for youth within the community, designed to help young people make responsible adult decisions.

The goal is to prevent violence in a planned positive way, develop and strengthen empathy, provide young people with practical skills and increased knowledge of animal care, and empower young people by providing them with purposeful activity that is valued in the wider community.

9.2 OUTREACH THERAPY PETS

Outreach Therapy Pets is a joint initiative between St John and SPCA Auckland. The program involves volunteers and their pets visiting rest homes, hospitals and other health services.

Animal-assisted therapy has been shown to promote emotional wellbeing in hospitals and rest homes. It is also used as an added therapy for children suffering from a variety of illnesses. Contact with gentle animals provides comfort and helps people to feel happier.

At the moment, Outreach Therapy Pets operates in Auckland, Kerikeri, Waihi and Thames and involves 250 volunteers visiting over 200 establishments.

Two kinds of therapy are offered through the program: animal assisted activity and animal assisted therapy. The animals involved include cats, dogs, rabbits, guinea pigs, hens, donkeys and miniature horses. SPCA Auckland helps by providing animal expertise and training.

The benefits of contact with pets

- Animals do not judge or criticise
- They treat everybody equally
- They are not shocked by human ailments, frailties, handicaps and confusion
- They can reduce the stress and fears associated with illness or old age
- They offer unconditional love and friendship

Source: St John, 2015

9.3 THE LINK

Research in North America, the United Kingdom and Australia has decisively established that abusive relationships with animals within a family setting are closely linked to domestic and social violence more generally (Potts et al, 2013). This connection is referred to as 'the link'.

These studies have found that animal cruelty occurs as part of a continuum of abuse. Violence towards companion animals is often indicative of child abuse within the family. In addition, children who harm animals are more likely to show aggressive and antisocial behaviours as adults (Potts et al, 2013).

There is also a growing body of evidence that shows that threatening to harm companion animals is a method commonly used by abusers to control their partners (SPCA, 2012).

A study published in the Australian Veterinary Journal found that 32% of women in an abusive relationship had their companion

animal threatened by the abuser. In a US study about 71% of pet-owning women entering women's shelters reported that their abuser had injured, maimed, killed or threatened family pets. Many victims of domestic violence avoid leaving their abuser, or delay leaving, to protect animals from threats made against them. (New Zealand Veterinary Association, 2015)

In 2012 the SPCA, in association with the Women's Refuge organisation, conducted New Zealand's first concerted local investigation into the connection between human-animal and human-human abuse, culminating in the publishing of the findings in a document entitled 'Pets as Pawns', and in 2012, the NZCAC featured 'the link' as the theme for its annual national conference.

The findings of the report noted that one in three (33%) of the women surveyed delayed leaving violent relationships for fear their pets and other animals would be killed or tortured by their abusive partners. Of these 25% said that their children had witnessed violence against animals in their home.

The survey involved 203 Women's Refuge clients, with 111 (58%) stating that animal cruelty was part of the violence suffered, with either a family member or partner threatening to kill their animals. One third of the respondents also reported witnessing actual injury or death of an animal in these circumstances.

Due to companion animals being considered members of the family, not only are they subject to the same violent acts as human family members, but they also require sanctuary from such abuse when their families seek shelter (Potts et al, 2013).

While research on 'the link' is still in its relative infancy in New Zealand, a number of important initiatives have sought to address it practically. In 2002 a New Zealand network based on the American First Strike program was launched, with the goal of ensuring information on cases of animal abuse and human violence is shared between social and animal welfare agencies. Significantly, in September 2008 New Zealand became the first country in the world to adopt a formal national protocol between the agencies for child and animal protection (Potts et al, 2013). The Link, Aotearoa, is now operated under the auspices of the NZCAC.

In 2015, the New Zealand Veterinary Association (NZVA) expressed strong support for amending the legal definition of domestic violence to include 'coercive control', which covers emotional and psychological abuse such as threats to harm the family pet. This was included in its submission to the Ministry of Justice in response to the discussion document *Strengthening New Zealand's legislative response to family violence*, which looks at how to reduce the high incidence and impact of family violence.

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10 About the New Zealand Companion Animal Council NZCAC

The strategic vision of the NZCAC is for New Zealand to be a "socially responsible nation for companion animals"

10.1 STRUCTURE

The NZCAC Executive Board is comprised of representatives from the following stakeholder organisations:

- New Zealand Companion Animal Council Inc.
- New Zealand Veterinary Association Inc
- The RNZSPCA
- NZVA Companion Animal Society
- New Zealand Kennel Club
- New Zealand Cat Fancy Inc

The Board can also have up to 3 "open" Board member positions.

The objectives of the NZCAC are four fold:

- To be the leaders in companion animal welfare and urban animal management through the use of scientific, evidence-based research to lobby and advocate on behalf of companion animals with a collective voice in New Zealand.
- To facilitate a harmonious relationship between companion animals, people and the environment (engage members in forums, networking, conferences, workshops, communications, etc.).
- To promote responsible pet ownership, the benefits of pet ownership and the human-animal bond.
- To recognise organisations and individuals displaying exceptional urban animal management and companion animal welfare. For example the Assisi Awards presented at the annual conference in recognition of outstanding service to animals in New Zealand or internationally.

10.2 HISTORY

Throughout New Zealand there are many individuals, organisations and official bodies who are actively involved both with the welfare and control of companion animals. The diverse nature of their philosophies and modus operandi creates a need for communication and the sharing of ideas so that collectively, and by consensus, each

and every one of them can contribute to the improvement of the welfare of companion animals in their areas of activity.

It was this ideology that prompted the Auckland SPCA to initiate the formation of a forum which would bring together the many and varied animal groups in an open meeting for an exchange of views and ideas.

The gathering in 1990 was named the Companion Animal Workshop, and it has enjoyed an annual conference status ever since. As the workshops/conferences grew in importance, and the intensity of the discussions developed into meaningful welfare concerns, it became apparent that the participants craved a structure whereby the resolutions of the meetings could be more actively pursued and topics raised could be further advanced.

As a result the NZCAC was established in February 1996 with the aim of being a forum for the facilitation of a harmonious relationship between companion animals, people and the environment and has since become a respected national organisation representing the amalgam of a diverse range of animal groups.

In 2015 the NZCAC completed a strategic review and established the Executive Board to provide governance and operationalize the outcomes of the strategic review.

Today the NZCAC has more than 80 members, including 59 organisations, and the associated New Zealand Companion Animal Trust (NZCAT) has five key stakeholders/trustees – SPCA, NZVA, NZ Kennel Club, NZ Cat Fancy and NZVA Companion Animal Society.

10.3 NEW ZEALAND COMPANION ANIMAL REGISTER (NZCAR)

As microchipping was becoming more common place, and in the case of dogs a legal requirement, the NZCAC recognised there was a need for a suitable New Zealand based animal repatriation system. This lost pet register operates 24/7 through both its website, www.animalregister.co.nz and its 0800 LOST PET register phone line.

The register is operated under the stewardship of the Board of the NZCAC which includes (but is not limited to) representatives from founding New Zealand Companion Animal Register stakeholder organisations.

These are The New Zealand Veterinary Association, The New Zealand Kennel Club, The New Zealand Cat Fancy, The Royal New Zealand Society for the Prevention of Cruelty to Animals, The New Zealand Companion Animal Society (a branch of the New Zealand Veterinary Association), and The New Zealand Companion Animal Council.

It is designed to provide instant access to comprehensive information which assists with reuniting animals with their owners/guardians.

10.4 NEW ZEALAND COMPANION ANIMAL TRUST (NZCAT)

The New Zealand Companion Animal Trust (NZCAT) has as Trustees, representatives from the Founding Stakeholders of the NZCAR. They include the NZ Veterinary Association, the NZ Kennel Club, the NZ Cat Fancy, the NZ Companion Animal Society, the SPCA and the NZCAC.

Under the establishment of the trust, profits derived from the register are allocated on application and at the discretion of the trustees to projects that provide ongoing welfare services to companion animals throughout New Zealand.

10.5 OTHER ACTIVITIES OF THE NZCAC

In its normal course of activities the NZCAC has been involved in the writing of various Codes of Welfare, and Minimum Standards, in association with the National Animal Welfare Advisory Committee (NAWAC) and the Ministry (MPI). These have included Codes for Cats, Dogs, and the Temporary Housing of Companion Animals.

Two publications issued by NZCAC deal with Codes of Welfare for cats and for dogs, containing the Minimum Standards of care as recommended, and in accordance with the Animal Welfare Act (1999). These publications may be viewed at:
www.nzcac.org.nz

Full Codes of Welfare may be viewed at:
www.mpi.govt.nz/protection-and-response/animal-welfare/codes-of-welfare/

The Animal Welfare Act (1999) may be viewed at:
www.legislation.govt.nz/act/public/1999/0142/latest/DLM49664.html

The communication of information and ideas is also an important function of the NZCAC, and in this regard its annual conferences are seen as important vehicles in sharing data, both from New Zealand and Internationally.

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Pet-n-Sur Exotic

11 Explanatory Notes

Baby Boomers: See ‘generation groups’.

Companion Animals: Any animal that shares a living environment and relationship with humans. The term ‘companion animal’ is an all-encompassing phraseology given to an entire spectrum of animals with whom interaction and/or companionship is enjoyed by humans, and where a responsible guardianship is established and accepted for their welfare by humans. Where it is accepted that this degree of ‘companionship’ will vary by species, the expression ‘companion animal’ acknowledges the important role all such animals play in our society.

Designer breed: A designer breed animal is deliberate offspring from two purebred animals of different varieties or breeds.

Dry pet food: Dry pet foods have lower moisture contents than other pet foods and can come in a number of food varieties depending on the companion animal (Euromonitor International, 2014).

Economy pet food: Includes all pet food with an economical price positioning. These products are generally sold in supermarkets, discount outlets and other non-specialist outlets (Euromonitor International, 2014).

Gen X: See ‘generation groups’.

Gen Y: See ‘generation groups’.

Generation groups: The 2015 New Zealand Companion Animal Survey incorporated expanded demographic data, including respondent age group or generation. The reason for this inclusion is to better understand the relationship between different generations and companion animal guardianship. Baby Boomers include people born between 1946 and 1964; Generation X (Gen X) includes people born between 1965 and 1980, and Generation Y (Gen Y) includes people born between 1981 and 1995.

Humanisation: Humanisation occurs when the pet owner increasingly treats their companion animal as a human by paying extra attention to the nutritional and psychological needs of their pet (Knight, 2010).

Mid-priced pet food: Includes all pet food with a price positioning that falls between economy and premium. Such products are typically sold through both pet and specialist outlets, as well as

supermarkets, discount outlets and other non-specialist outlets (Euromonitor International, 2014).

Mixed breed: Mixed breed animals differ from other cross-bred animals in that their parentage is undocumented or unknown.

Mixers: The essential function of a mixer in pet food is to make the main meal bulkier. Mixers are created to complement wet pet food types and may have additional benefits such as being good for teeth, although they are not considered a health care or dietary supplementary product (Euromonitor International, 2014).

Ownership rates: The percentage of households that are also home to companion animals.

Pet: See ‘companion animal. The terms ‘pet’ and ‘companion animal’ are used interchangeably in this report.

Pet care products: Items manufactured for use on or by pets, including toys, scratching posts, bowls, litter trays and grooming items.

Pet care services: Includes all pet care services including veterinary services, pet-minding, transport, clipping and grooming and walking.

Pet/companion animal/animal type: Refers to a species of animal i.e. a dog, cat, etc. as opposed to specific breeds of different species i.e. Labrador, Alsatian, German Shepherd, etc.

Premium pet food: Premium pet food products are generally higher priced, or the brand positioning is considered speciality. These are typically available through specialist pet stores and supermarket outlets (Euromonitor International, 2014).

Premiumisation: Refers to pet owners seeking premium pet food options that have a higher price positioning and are branded as premium or high quality.

Private label: Refers to a brand owned by a retailer or supplier, generally a supermarket chain, (as opposed to a producer or manufacturer), with its own label, that gets its goods made by a contract manufacturer.

Pure breed: Purebred animals refer to companion animals that have been bred from parents of the same breed or variety and have unmixed lineage in their pedigree strain.

Regional/rural: Those areas not considered metropolitan (urban or suburban) areas.

Suburban: Residential areas located on the outskirts of a metropolitan area.

Treats: Products marketed and fed not as a main meal, but more as a reward or indulgence. They include chocolate flavoured, meat, biscuit, cereal, milk, fish or yeast –based products (Euromonitor International, 2014).

Units and apartments: The Australian Pet Ownership survey groups units and apartments as one accommodation type.

Urban: Residential areas surrounding a city.

Wet pet food: Wet pet food products have a moisture content of 60-85% and are generally (not always) preserved by heat treatment. Wet pet food is packaged in steel or aluminium cans, rigid or flexible plastic, or semi-rigid aluminium trays (Euromonitor International, 2014).

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