Animal Medicines Australia
The voice of the animal health industry

Pets and the Pandemic

A social research snapshot of pets and people in the COVID-19 era

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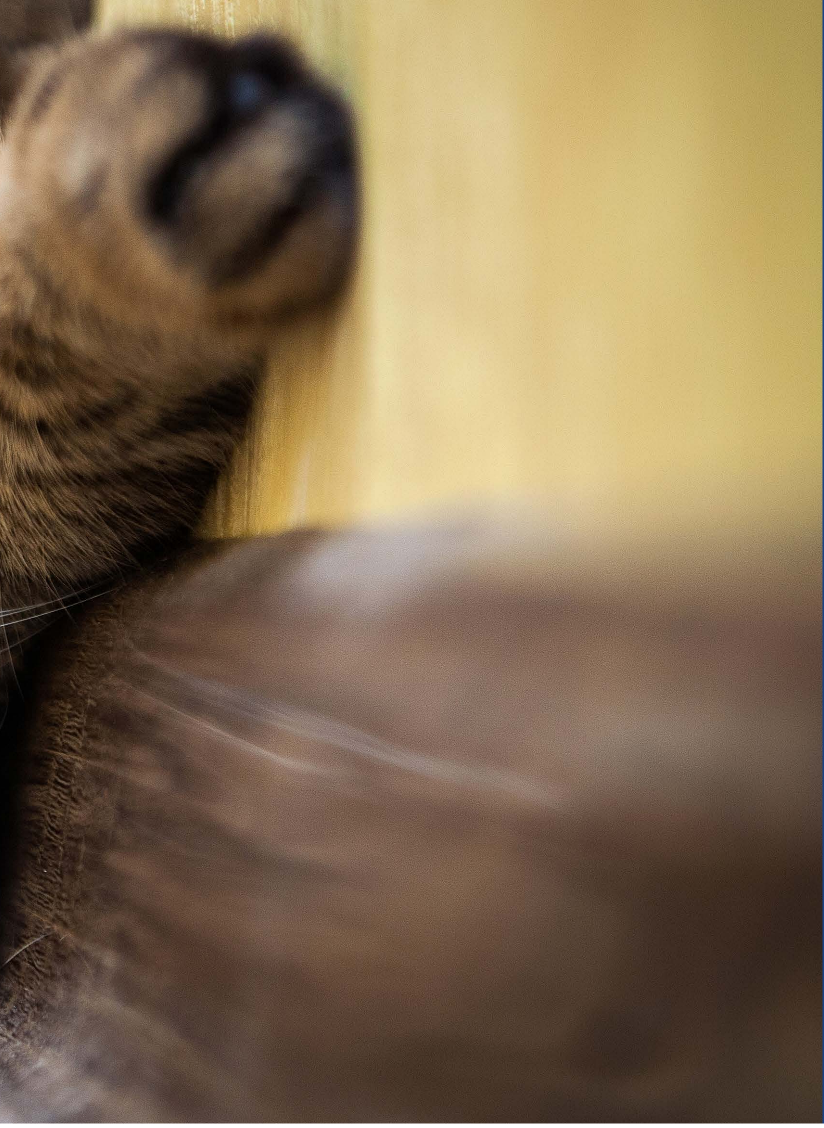

Animal Medicines Australia

Animal Medicines Australia (AMA) is the peak body representing the leading animal health companies in Australia.

Our members include those who develop, formulate, register and manufacture veterinary medicine products aimed at managing the health of our pets, livestock and horses.

As part of our role, AMA provides up-to-date data and information on trends to inform decision-making and policy development, with this research and the triennial *Pets in Australia* reports all part of that work.

Our Members

Boehringer Ingelheim, Elanco, Jurox, MSD Animal Health, Phibro Animal Health Corporation, TROY Animal Healthcare, Vetoquinol, Virbac, Zoetis

Acknowledgements

Animal Medicines Australia acknowledges the Pet Food Industry Association of Australia, the Pet Industry Association of Australia and Australian Veterinary Association for their contribution to this report.

AVA Australian Veterinary Association
PFIAA Pet Food Industry Association Australia
PIAA Pet Industry Association

Message from the president

As Australia and the rest of the world adjusted to significant restrictions introduced because of the COVID-19 pandemic, stories began to emerge about an increase in pet ownership.

As leaders within the pet industry, Animal Medicines Australia considered it essential to understand how the pandemic has changed our relationships with our pets and the people that help care for them.

In this report, *Pets and the Pandemic*, our research indicates that the COVID-19 pandemic restrictions may have created an opportunity for Australians to introduce a previously desired pet into the family, rather than the pandemic being the reason itself for acquiring a pet. For instance, working from home arrangements have provided the opportunity to spend time with a young pet.

Our research shows the early anecdotal reports accurately reflect the biggest boom Australia has seen in pet ownership. In a time of significant uncertainty and reduced social interaction, Australians have turned to pet ownership as a source of comfort and joy. This report, a supplement to Animal Medicines Australia's triennial report, includes overall pet population data as well as information specifically focused on cats and dogs based on a quantitative survey and qualitative research.

Owners said that pets had a positive impact on their lives throughout the pandemic because they provided joy, comfort and were good for mental health. The smaller number of negative experiences reported were associated with things like restricted walking times, worrying that their pet could catch COVID-19 or having their pet pass away.

With pet ownership now at record levels, policy makers must consider the needs of companion animals and their owners. This should range from rental, strata and body corporate regulations to animals in public places, transport access and holiday accommodation. The pandemic also showed that pet animal welfare must be explicitly protected as an essential service/activity.

I would like to thank our industry colleagues at the Pet Food Industry Association of Australia, the Pet Industry Association of Australia and the Australian Veterinary Association for working with us and sharing these insights with the community.

Our pets bring so much love and joy to our lives; it is our responsibility in turn to provide them with the best health, care and environment we possibly can.

Lance Williams
President

Animal Medicines Australia

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1.

Top insights

There has been a substantial boom in pet ownership, with an estimated 30.4 million pets across the country. Nationally, 69% of households now own a pet, up from 61% only two years ago. This has been led by a surge in dog ownership—with over a million additional dogs being brought into Australian households since 2019.

The companionship provided by pets continues to be highly valued by Australians, and the pandemic has given an opportunity for some to experience the benefits of pets for the first time. In both focus group discussions and survey findings, pet owners were near-unanimous in advocating the benefits of pet ownership—wanting others to experience that same joy, so long as they understood the responsibilities.

Pet owners reported that the emotional and social benefits gained from their companions more than outweighed any challenges experienced. Indeed, the survey results suggest an estimated 7.3 million households would like to add a pet to their family—including 85% of pet owners and 43% of non-owners.

Contrary to media portrayals of 'pandemic pet parents', most new or additional pet owners said they had long been thinking of adding a pet to their household—the pandemic had simply given them the time and opportunity to be home to 'on-board' the pets they've long wanted.

On average, pet owners are spending $3,200 per dog and $2,100 per cat each year—primarily on food, veterinary services, and healthcare products. Extrapolated across the country, dog owners have spent $20.5 billion in the last year while cat owners have spent $10.2 billion.

Throughout the pandemic, 37% of pet owners reported experiencing difficulty accessing things like pet food, treats and veterinary services.

On average, pets have been taken to the vet twice since the onset of the pandemic (more frequently for dogs, at 2.5 times)—with vaccinations and general check-ups remaining the most common reasons. While awareness of pet telehealth services appear low, veterinarians remain the top source of information, and 71% of all pet owners have visited the vet at least once during the pandemic.

Focus on dogs:

A fifth (19%) of all pet dogs in Australia have been procured during the pandemic—divided equally between new owners and experienced dog owners.

Companionship is by far the top reason for wanting a dog, with breed temperament and size also considered relatively important.

Focus on cats:

A quarter (24%) of all pet cats in the country were also obtained during the pandemic—again divided between new and experienced cat owners.

Almost half were given freely, and companionship and rescue were the top reasons for getting a cat.

The pandemic appears to have strengthened the relationship between people and their pets as they spend more time together, with 70% saying that being a pet owner has improved their lives during the COVID-19 era.

While our participants in both the focus groups and the survey struggled to pinpoint specific changes to behaviours in their pets or themselves, they were able to readily name overall benefits including companionship, comfort, positive mental and physical health, and unconditional love.

2.

Background and methodology

Background

Animal Medicines Australia (AMA) is the peak body representing leading animal health companies in Australia.

As part of its role, AMA provides up-to-date, authoritative data on pets and pet ownership in Australia—chiefly through its triennial *Pets in Australia* survey to track the state of pet ownership in Australia.

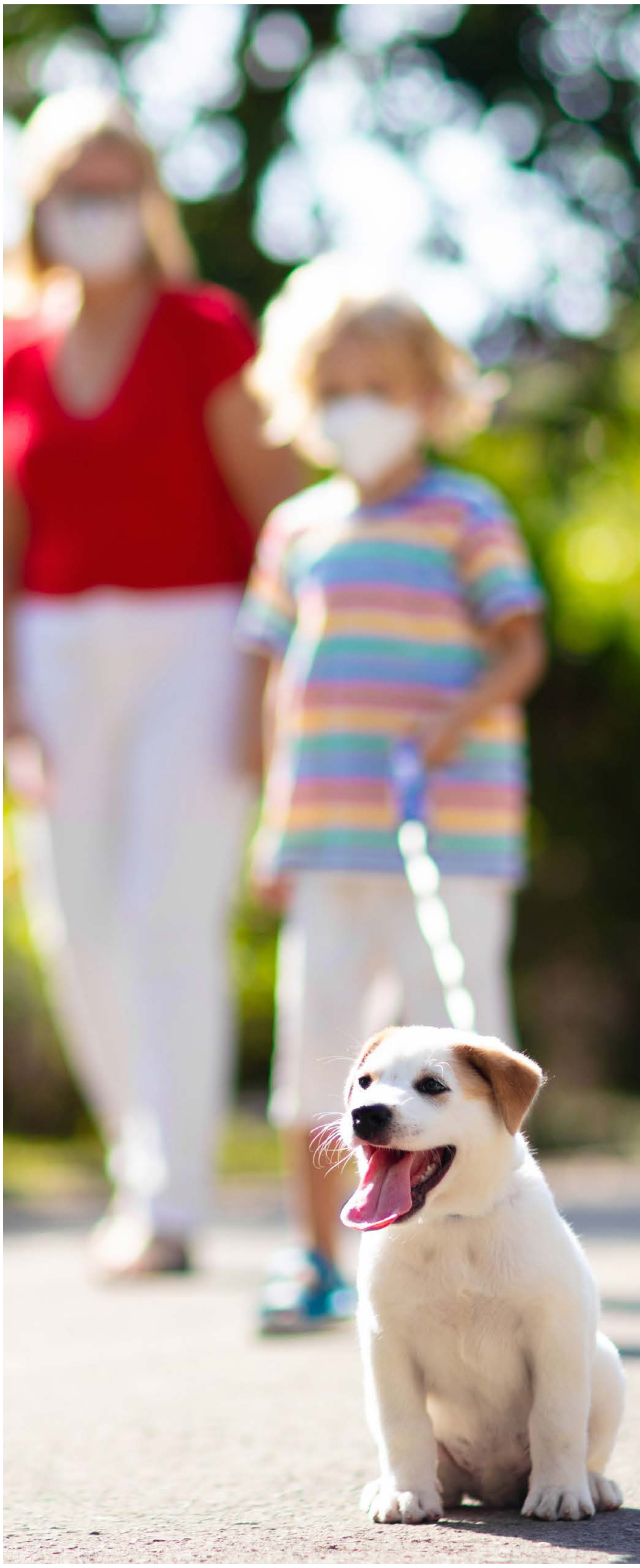
Following the unprecedented changes to daily life as a result of the global COVID-19 pandemic, media coverage on pets and reports of rising waitlists from breeders and animal shelters suggested a substantial shift in the state of pet ownership—including new challenges and evolving relationships with pets and their owners.

Against this context, AMA commissioned Newgate Research to undertake a program of research to explore and provide a 'snapshot' into pet ownership against the backdrop of COVID-19 concerns and restrictions, as well as to track any impacts of the pandemic against key metrics from the previous triennial national survey.

Objectives

Specifically, the key objectives for the research were to:

- Explore the uncharted experiences of pet owners during the pandemic, including new 'pandemic pet parents' and perceived benefits and challenges;
- Quantify and track key changes to pet ownership, benchmarked against the 2019 national survey to validate any shifts due to COVID-19 and lockdowns; and
- Explore how pet parenting consumption behaviours may be shifting, including sources of information, food, accessories, medicines and veterinary care.



Methodology overview

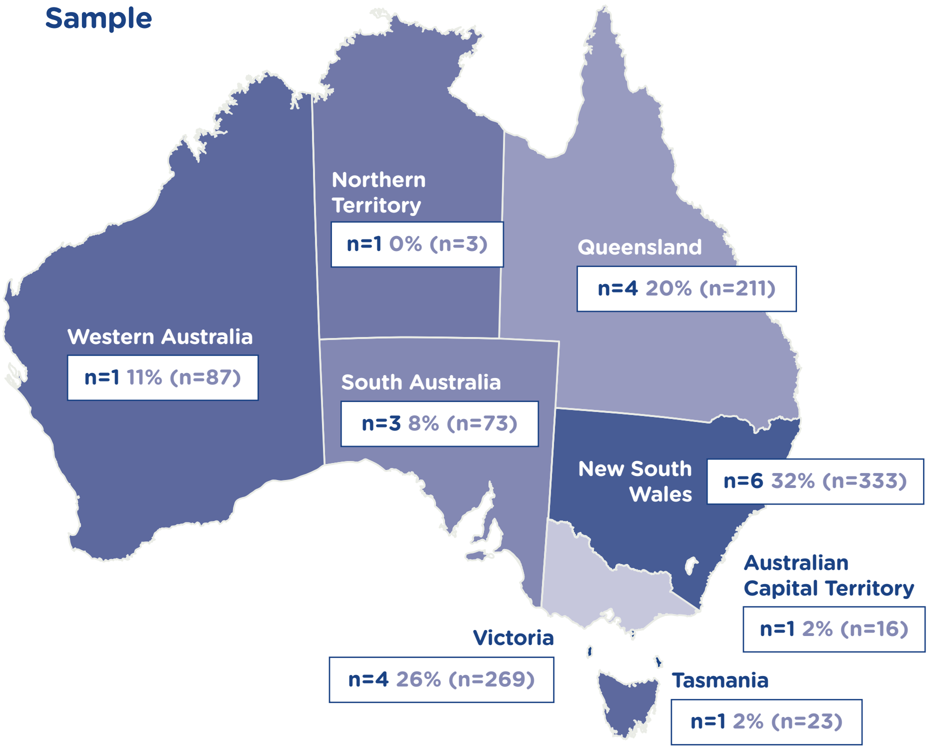
Phase 1: Online focus groups

- 4 x 1.5-hour focus groups by video conference
- Total of 21 participants recruited from across Australia by Research Connections, each receiving a $90 industry-standard incentive
- Groups were split by cat vs. dog owners and recency of cat/dog acquisition, with quotas set to ensure a diverse mix of other demographic and sociocultural traits
- Conducted 13th–14th April 2021, with moderation by Philip Partalis, Jasmine Hoye, and Lisa Vo of Newgate Research

Phase 2: National online survey

- Nationally representative online survey with n=1,017 adult Australians, including pet owners and non-pet owners—with a robust overall margin error of +/- 3% at the 95% confidence level
- Fieldwork was conducted between 7th–13th May 2021 with survey programming and hosting by Lucid; participant sample was sourced from professional opt-in market research panels
- To ensure a population-representative sample, ABS Census quotas were set by place of residence (state/territory interlocked with metro vs. regional), plus age interlocked with gender
- To minimise sampling bias, results were also weighted by Census proportions for household location and size (for findings relating to household traits), and by location, age and gender (for results relating to individual attitudes and behaviours)
- The overall survey methodology is consistent with that of the most recent triennial *Pets in Australia* report published in 2019; please refer to this document for full methodological details

Sample



n=	Number of focus group participants by state/territory
% (n=)	Survey sample by state/territory

Notes to the reader

- Percentages presented throughout may not add up to 100% due to rounding, or because questions allowed multiple responses
- Any statistically significant differences reported are at the 95% confidence level and noted using arrows or colour-coding. While some differences may appear significant, they may not be considered statistically reliable due to small sample sizes

The research was undertaken in compliance with the Australian Polling Council Quality Mark standards which can be viewed here: https://www.newgatecomms.com.au/disclosure-statements/. A methodology disclosure statement for this research appears at the end of the report

3.

Pet ownership

Pet ownership in 2021

There has been a substantial boom in pet ownership since 2019, with an estimated 30.4 million pets nationally. The proportion of pet-owning households has increased significantly from 61% to 69% in just over two years—led by a surge in dog ownership.

Pet ownership in Australia, 2019 vs 2021

Pet type	Household penetration (%)		Total owner households ('000)		Animals per household (average)		Total pets ('000)	
	2019	2021	2019	2021	2019	2021	2019	2021
Dogs	40	47 ▲	3,848.2	4,644.6	1.3	1.4	5,104.7	6,344.3
Cats	27	30	2,602.4	3,030.7	1.4	1.6	3,766.6	4,903.3
Fish	11	13 ▲	1,056.8	1,314.5	10.7	8.5	11,331.7	11,186.5
Birds	9	14 ▲	867.9	1,384.0	6.4	3.9	5,569.4	5,448.4
Small mammals	3	5	257.8	498.9	2.4	3.0	614.5	1,502.0
Reptiles	2	4	194.5	426.4	1.9	1.6	364.2	663.4
Other pets	2	1	194.8	118.6	9.2	3.4	1,785.3	401.2
Pet Owners	**61**	**69 ▲**	**5.9 m**	**6.8 m**			**28.5 m**	**30.4 m**
Non-Owners	**39**	**31 ▼**	**3.7 m**	**3.1 m**				

'Other' types of pets mentioned included mostly 'farm' animals such as horses, cows and sheep.

This estimate of 30.4 million pets is substantially higher than the 28.5 million estimated two years prior in the 2019 *Pets in Australia* report—due to an overall population growth, an increased proportion of pet-owning households, slight increases in the average number of animals (especially dogs and cats—the two most prominent types of companion animals in Australia), and a rise in households with multiple types of pets (from 22% to 27%).

A7. Which of these pets, if any, do you have in your household? // A8. How many pets do you have? // Base: All participants (2021 n=1,017) // Extrapolations by total households or persons have been based on the ABS Household and Family Projections (cat. no. 3236.0) and the ABS's 'Population Projections, Australia, 2017-2066' – placing the estimated number of households nationally at 9,955,106 under a medium-growth scenario, the total population at 26,301,274, and the number of adults at 20,429,953. Note these are estimates only and should not be considered definitive quantification of total pet populations.

Blue up / pink down arrows indicate significant differences between 2019 and 2021

Pet ownership experiences

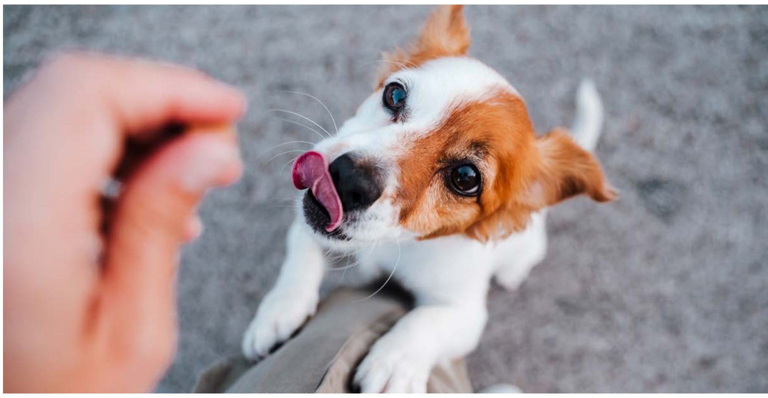
This study focused on the experiences of dog and cat owners, a group that say the emotional and social benefits of having their companion animals more than outweigh any challenges experienced. This is consistent with the 2019 survey findings.

In focus group discussions with owners of dogs and cats, participants were unanimous in advocating the benefits of pet ownership and for others to experience the joys. This was especially true for dog owners, whereas some cat owners were more circumspect and said their recommendation would depend on the cat and the potential owner understanding cat temperaments. All of them underscored this sentiment with the need for prospective owners to understand the long-term responsibilities involved, including selecting the right species and breed for their lifestyle and circumstances.

Pet ownership begets pet ownership, with many saying they had grown up with a pet, which informed their desire for a pet as well as the type and breed of pet they did or did not want—though a few ended up with different types or breeds than they'd envisioned due to housing and lifestyle constraints. In turn, they often wanted their children to grow up experiencing the joys of having pets.

Companionship, affection and comfort were some of the top unprompted reasons given by focus group participants for having a dog or a cat. Dog owners also enjoyed a more active lifestyle, and both dog and cat owners said pets brought more routine and discipline to their lives—helping to improve their physical and mental well-being, particularly through the tougher parts of the pandemic (e.g. extended lockdowns, job losses). More on pandemic experiences appears in the following section of the report.

While all acknowledged there were challenges (e.g. needing a suitable space, boarding and minding while away from home, and on-going costs), it was clear that **pets remained a deeply loved and highly important relationship in their owners' lives,** with the perceived benefits far outweighing any challenges experienced.



"They're so loving and such a beautiful energy around the house—even if they're hard work, you just put the work in."

New dog owner

"Cats are good companions, they're not bothersome, they each have their own character and just go off when they want to go off."

Experienced cat owner

"Yeah, I'd recommend pets ten out of ten, but just be careful. I'd qualify it with get the right breed for your needs."

Experienced dog owner

"I really love having the cat, she's really improved our lives... but it has been a change in how independent we've been in being able to get away at short notice."

New cat owner

Quotes from focus group participants (n=21)

Interest in pet ownership

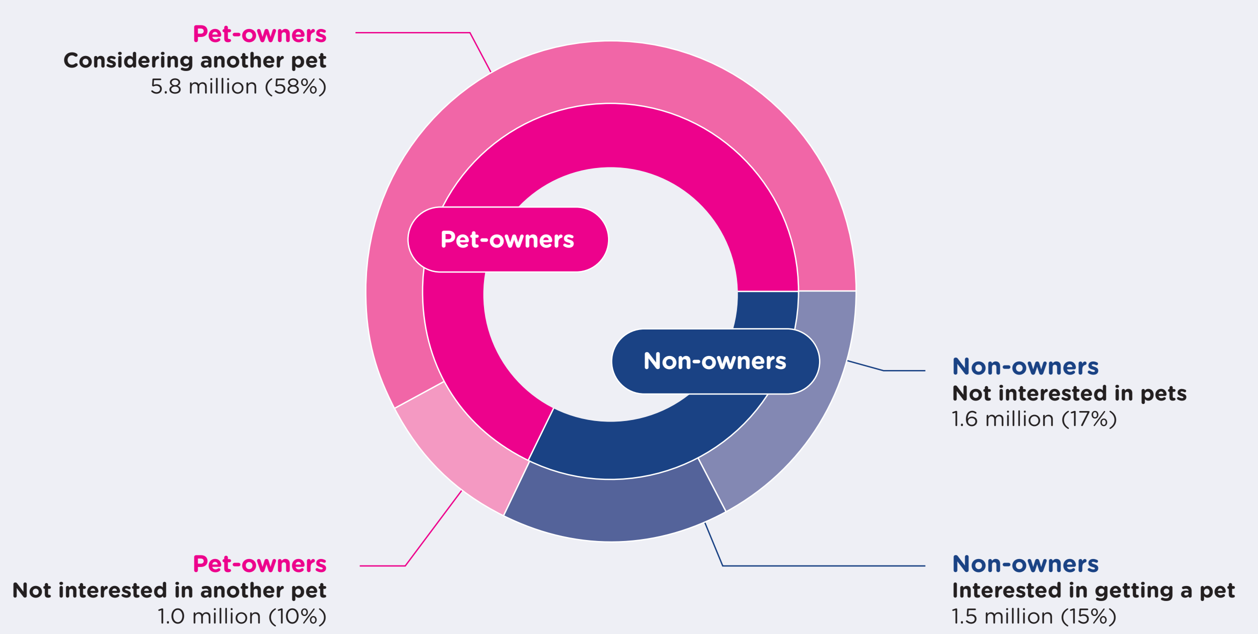
Pet ownership is a way of life for the majority of Australians, and an estimated 7.3 million households (73% of all households) would like to add a pet to their family—with current pet owners far more open to the idea compared to non-owners.

In total, 73% of households would like to add a pet to their family.

Notably, 85% of current pet owners (i.e. 58% of all households) said that they would like more pets, compared to 47% of non-owners (i.e. 15% of the total).

This may be partly driven by having already overcome the main barriers to pet ownership (see the following page) or a desire to find companions for existing pets. Indeed, survey results for dog owners indicate that a fifth (22%) said they got at least one dog to be a companion for an existing pet in the house (see page 20).

Pet ownership in Australia, 2021 - share of all households (%)



Differences by current pet ownership status

Type of pet desired (%)	All participants	Pet owners	Non-owners
Dogs	50	57 ▲	35 ▼
Cats	28	33 ▲	16 ▼
Fish	18	23 ▲	9 ▼
Birds	16	21 ▲	6 ▼
Small mammals	12	15 ▲	4 ▼
Reptiles	10	13 ▲	3 ▼
Other pets	2	2	1

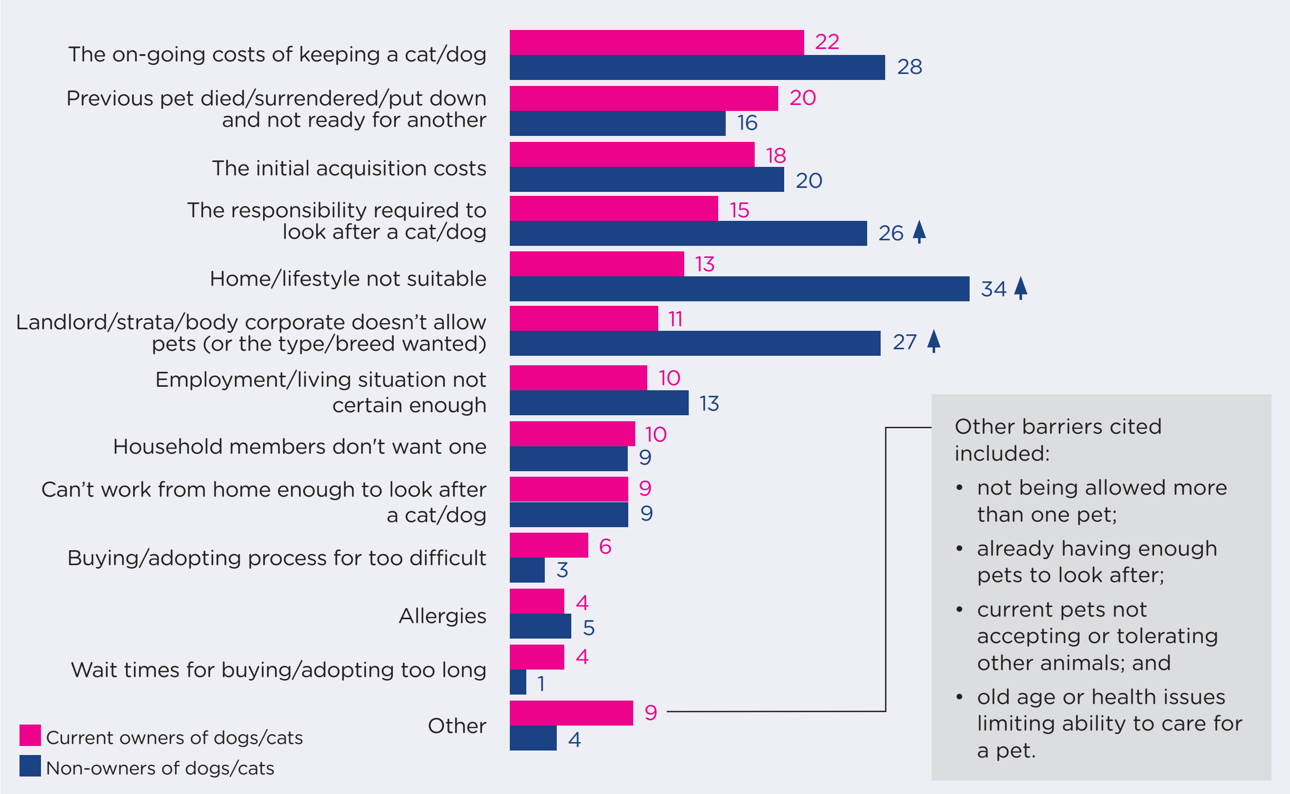
A7. Which of these pets, if any, do you have in your household? // A9. Which of these types of pets, if any, would you like to have? If you are a current pet owner, this is in addition to the pets you already have - and can include more of the same type of pets. // Base: All participants (n=1,017) // Pet owners (n=716) // Non-owners (n=297)

Blue up / pink down arrows indicate significant differences between current pet owners and non-owners

Barriers to pet ownership

The on-going costs of care are the strongest deterrents for those who want to add a dog or cat to their household. Further, those without an existing dog or cat were far more likely to point to unsuitable living arrangements and the perceived burden of responsibility.

Reasons for not having a/nother dog or cat (%) *Multi-select response*



The 2019 survey found that unsuitable living arrangements were the greatest barrier for non-owners interested a dog or cat. While these have remained among the top barriers, they were indicatively raised by fewer participants in this survey (52% then vs. 34% now)—perhaps owing to greater work-from-home flexibility since the onset of the pandemic; this hypothesis echoes parallel focus group discussions amongst pet owners. Increasing recognition of the importance of pets within the real estate and housing space also appears to have progressed this, as indicated by reports on increasing pet friendly housing (see below).

Suitable living arrangements

As pet ownership in Australia boomed throughout the COVID-19 pandemic, the impact was also realised in the real estate sector. In 2020, "pet-friendly" came in as the 5th most popular keyword on realestate.com.au(1) having not featured in 2019's top ten terms. Property developers are also looking to consider the needs of pet owners with amenities such as larger balconies, hard-wearing floors or facilities such as a pet wash(2).

The Australian Housing and Urban Research Institute published a study on the policy and regulatory setting that shape housing options available to households that own companion animals. The report concluded that while some jurisdictions are moving towards more pet-permissive policy development and practice models, many barriers remain in access, mobility/transition and exit pathways for households with companion animals(3).

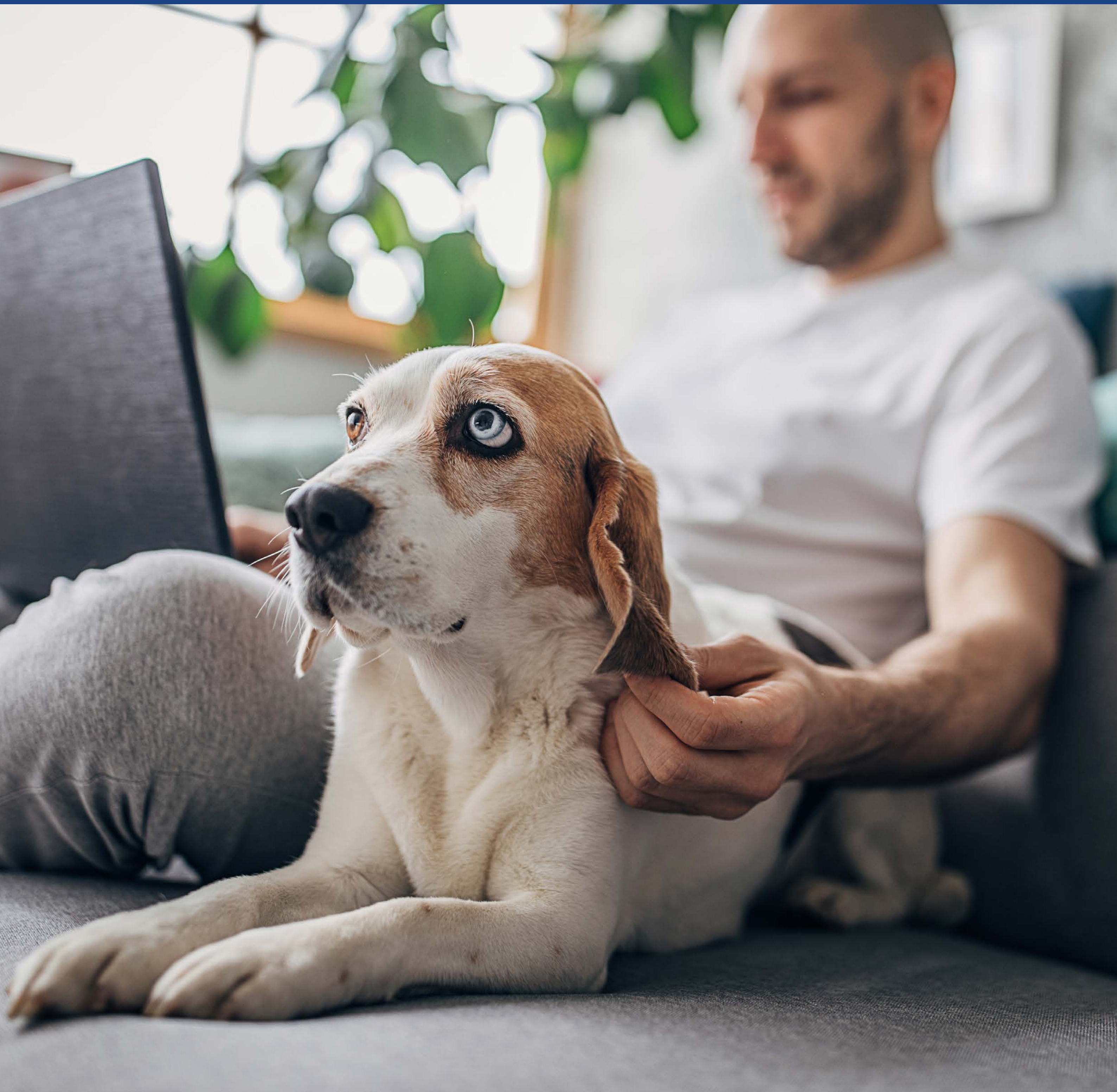
(1) https://www.realestate.com.au/news/pet-owners-fall-head-over-paws-for-the-purrfect-home/
(2) https://www.realestate.com.au/news/pets-planning-in-melbourne-highrises-should-be-mandatory-caydon/
(3) Stone, W., Power, E.R., Tually, S., James, A., Faulkner, D., Goodall, Z. and Buckle, C. (2021) Housing and housing assistance pathways with companion animals: risks, costs, benefits and opportunities, AHURI Final Report No. 350, Australian Housing and Urban Research Institute Limited, Melbourne, https://www.ahuri.edu.au/research/final-reports/350, doi: 10.18408/ahuri5121601

A10B. What are the reasons you do not currently have a/nother cat/dog? // Base: Current owners of dogs/cats who would like a/nother dog/cat (n=424) // Non-owners of dogs/cats who would like a/nother dog/cat (n=123)

Blue up / pink down arrows indicate significant differences between current owners and non-owners of dogs and cats

4.

Impacts of COVID-19



Pet ownership during COVID-19

Not all pet acquisitions during the pandemic have been by new pet parents—indeed, 53% of all dogs and cats acquired since March 2020 have been by existing pet owners. Overall, pet owners reported more time and strengthened relationships with their pets.

When asked to describe how being a pet owner impacted on them during the COVID-19 pandemic, **pet owners spoke overwhelmingly of positive experiences and gratitude,** using descriptors such as "happy", "good", "grateful", "lucky" and "comforted".

Contrary to media portrayals of 'pandemic pet parents', most new pet owners said they had long been thinking of adding a new pet to their household—the pandemic had simply given them the time and opportunity to be home to 'on-board' the pet they've wanted; indeed, some bristled at the suggestion they were irresponsibly 'chasing trends'. The survey lends some credence to this, showing that 53% of all dogs and cats acquired during the pandemic were by existing dog and cat owners, and COVID-specific reasons were rarely selected as a key motivation for acquisition.

Overall, the COVID-19 pandemic appeared to strengthen relationships between owners and their pets—further reinforcing the largely positive experiences of being a pet owner.

Pet impact on social isolation

Pets, touch, and COVID-19: health benefits from non-human touch through times of stress by Dr Janette Young and colleagues (University of South Australia) explored the impact of contact between pets and their owners while human contact is limited through the COVID-19 pandemic. This study found that "participants frequently described touch-based interactions with their pets as being comforting or relaxing in a way that contributed to their overall wellbeing." The impact of pets in healthcare settings, in aged care, and in broader society led the authors to conclude that now is the time to grasp the value of pets and develop policies that recognise their role.[4]

(4) Young, J., R. Pritchard, C. Nottle and H. Banwell, 2020. "Pets, touch, and COVID-19: health benefits from non-human touch through times of stress" in Journal of Behavioural Economics for Policy, v.4 (COVID-19 Special Issue 2), p25-33

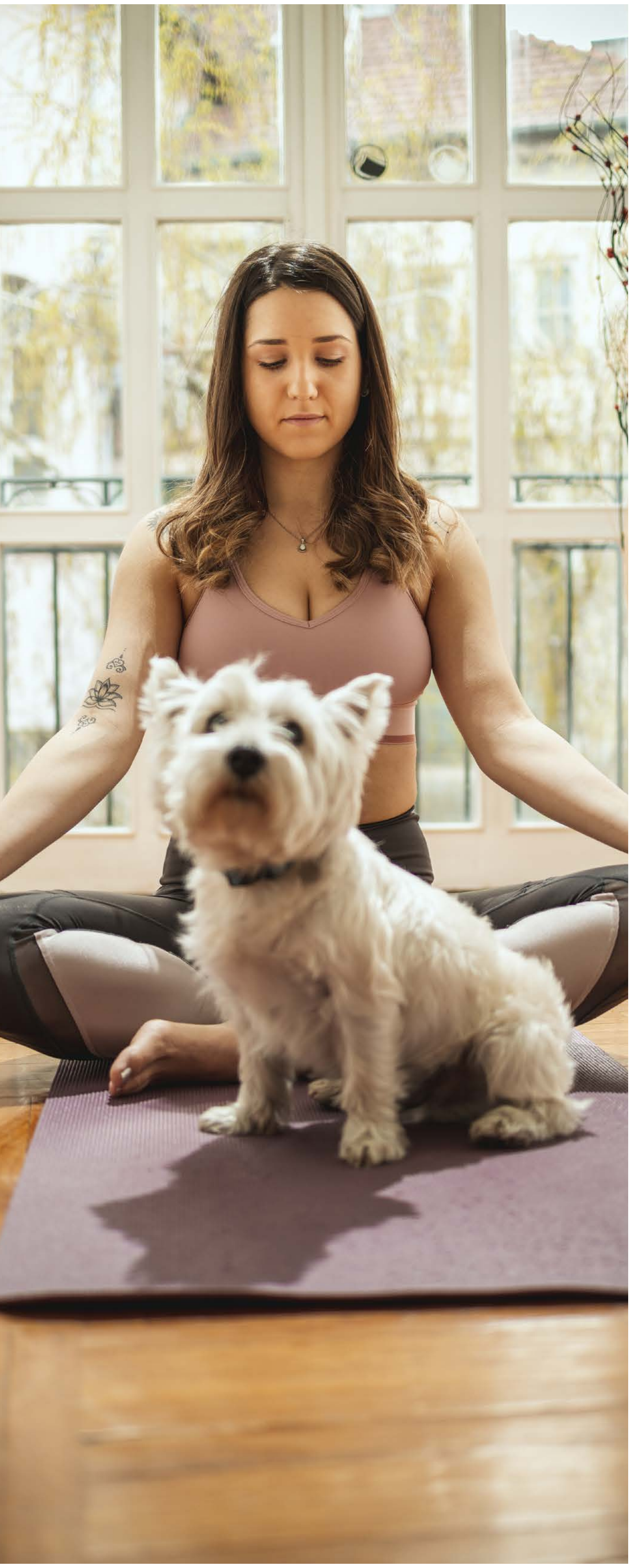
"The fact that we were home so much, our cats got used to us. And they're better with other people now, so I think we've socialised and domesticated them. And if it weren't for COVID, that wouldn't have happened."

New cat owner

Z1. In a single word, how would you describe the way you've felt about being a pet owner over the course of the pandemic?
Base: Pet owners (n=716) // Quotes from focus group participants (n=21)

Pet ownership during COVID-19 cont.

A small portion of pet owners noticed specific impacts of COVID-19 on their pets and their pet routines—including heightened concerns and difficulties due to the pandemic.



Only a few owners with existing pets noticed any changes in their pets during lockdown. Notably, those with cats felt their pets had become friendlier and more 'used to' humans due to continued proximity. Meanwhile, dog owners acknowledged taking their dogs out for more walks as an excuse to get out of the house—despite heightened concern from some around the COVID-19 virus and whether their dogs could contract it from strangers or the environment; this concern was echoed in the survey (see page 17).

A few dog owners also recalled experiencing **difficulties in accessing some food items and services for their pets,** including being unable to send their dogs to socialise and train at puppy school, and experiencing bone shortages at the butchers.

"When there was lockdown, I had a lot of concern for my dog Max. I wouldn't send him outside, and gave him fresh food and water and everything. Cleaned everything and kept everything covered. I was more hygiene conscious, yeah."

Experienced dog owner

Pet repatriation

Throughout the pandemic, there was significant media coverage of families who were returning home to Australia but were experiencing difficulties bringing their beloved family pet with them. In September 2020, Federal Minister for Agriculture David Littleproud announced[5] that pet owners who were seeking to repatriate their pets to Australia would be allowed to tranship their cats and dogs via Sydney to the Post Entry Quarantine Facility in Melbourne (when there was not option for their pets to fly directly to Melbourne). In September, the Government reported that 2,800 dogs and cats had arrived in Australia, approximately 60% of the volume for the same period in 2019.

(5) https://minister.awe.gov.au/littleproud/media-releases/cats-dogs-tranship-sydney?fbclid=IwAR1utuqvKH4phTTT1jYyJ4spUCG4jGUycjCFJmeMffNjVt-io2iTKYT1sRO

Changes to pet and people behaviours

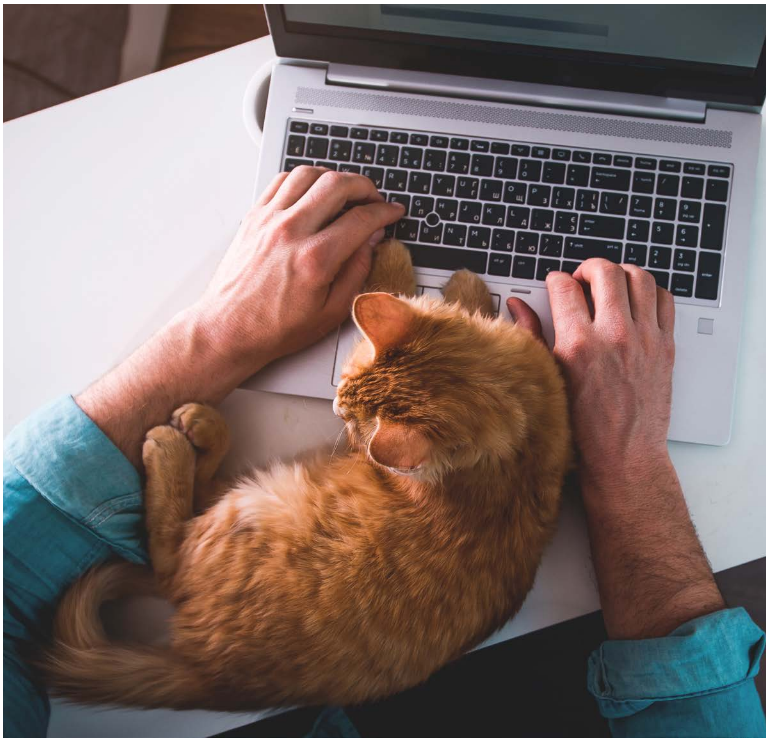
While 49% of owners reported spending more time with their pets than before the pandemic, most struggled to articulate any specific behavioural shifts in their pets or themselves—beyond more frequent interactions resulting in more talking/treats/walks.

Behavioural science and other research tell us people are often unable to accurately recollect past events and to judge self-behaviour (i.e. recall bias). Self-determination of behaviour should therefore be interpreted with caution.

- Indeed, both the focus group and survey findings highlighted that people often found it difficult to recall specific changes in their relationship with their pets, or to otherwise judge the extent to which they themselves changed. This vagueness appeared exacerbated by the prolonged nature of the COVID-19 lockdowns and restrictions, which may have 'blurred' recollections of subtle shifts.

Nevertheless, survey participants were asked to evaluate any behavioural or attitudinal shifts against a battery of measures, with many failing to produce any result of note. Among the measures evaluated, the most notable were:

- **Around nine out of ten pet owners felt they had a high-quality relationship with their pet/s** (rated 7 or more out of 10). This remained consistent over different timeframes—applying equally before (91%) and during (90%) the height of pandemic restrictions, as well as following the easing of these restrictions across much of Australia when the survey was conducted in May 2021 (93%).
- **Almost half of pet owners said that they now spend more quality time with their pets compared to before (49%) and even during the pandemic (46%)**. This may be due to continuing flexibility around working from home for many office workers.
- **The majority of owners didn't notice any specific changes in their pets during the pandemic.** Those who did observe (or recall) any differences were most likely to feel their pets were more playful (22%) or active (21%), as well as sleeping more (20%) and eating more (19%). We note, however, that this may simply be the result of pet owners being home to observe typical pet behaviours.
- **As with their pets, the majority of pet owners didn't perceive any changes in their own behaviours**—again, likely due to the fact that ratings of self-behaviour are often over- or under-estimated. Some owners specifically recalled talking to their pets more (38%), giving more treats (30%), or taking them out for more walks (27%)—followed by washing/grooming their pets more (20%), buying more gifts/accessories (19%), posting more about their pets on social media (18%), or feeding them more in general (17%).
- **Reinforcing this, the majority of owners (60%) reported no discernable changes in their pet-related shopping habits.** At lower levels, 8% reported shopping online more for pet-related items, while others adjusted their spending up/down (4% each way) or focused more on healthier or better-quality pet foods (also 4%).

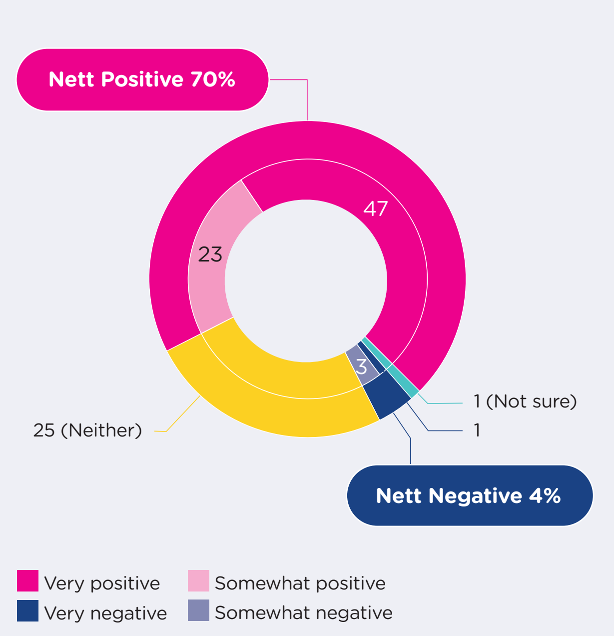


Z4. Overall, how would you rate the quality of your relationship with your pet/s? If you have more than one pet, please consider your relationships with them on balance. // Z5. How has the amount of quality time you spend with your pet/s changed, if at all? If you have more than one pet, please think about the quality time you spend with them on balance. // Z6. During the height of the COVID-19 pandemic restrictions, did you notice any of the following behaviours in your pet/s compared to before the pandemic? If you have more than one pet, please choose any that apply. // Z7. During the height of the COVID-19 pandemic restrictions, did you notice any of the following behaviours in yourself compared to before the pandemic? If you have more than one pet, please think about your behaviours towards them on balance. // F30. Since the onset of the COVID-19 pandemic (i.e. since March 2020), how have you changed your shopping habits when it comes to food, accessories and healthcare products for your pet/s? (Coded thematically) // Base: Pet owners (n=716)

Positive and negative impacts

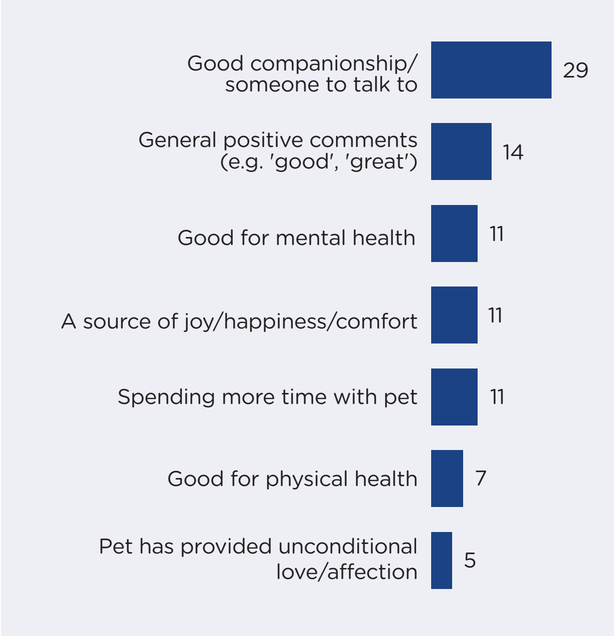
Overall, 70% of owners said pets have had a positive experience on their lives during the pandemic—with almost half (47%) feeling 'very positive'. This was driven by the companionship provided, mental health benefits, and having a constant source of joy.

Impact that being a pet owner had on life during the COVID-19 pandemic (%)



Reasons for feeling positive (% of all owners)

Open-ended responses coded thematically, 5+% only



"It's my first time to have a cat, I got her from a rescue shelter... she's effectively my therapy cat. I work quite long weeks, like I can work 100-hour weeks, but a cat is very independent. So that's why we went for a cat."

New cat owner

"[Dogs] fill a void, if you've got a void in the family. They keep you active. They make you get up and about, so even if you struggle getting up and out of bed, you have to do it."

Experienced dog owner

Only a very small number of participants felt negatively about being a pet owner during the pandemic. These negative experiences were predominantly informed by pandemic-related restrictions and concerns (e.g. possible virus transmission to and via pets: broader financial concerns and stress). Other reasons cited included pets passing away during the pandemic, and experiencing difficulties accessing services and pet products and food.

Those who chose the neutral middle ground were most likely to say that hadn't perceived any impact or change as a pet owner during the pandemic—an explanation offered by 61% of this cohort of pet parents. As previously noted, this perception may be attributed to difficulty in judging self-behaviours.

Z2. Since the onset of the COVID-19 pandemic (i.e. since March 2020), what kind of impact – positive or negative – has being a pet owner had on your life? // Z3. How has being a pet owner changed your life since the onset of the COVID-19 pandemic, for better or worse? What are some of the benefits or downsides? (Coded thematically) // Base: Pet owners (n=716) // Had negative impacts during COVID-19 (n=28 – note the small sample size, so please treat results with caution) // Had positive impacts during COVID-19 (n=505)

5.

Focus on dogs and cats

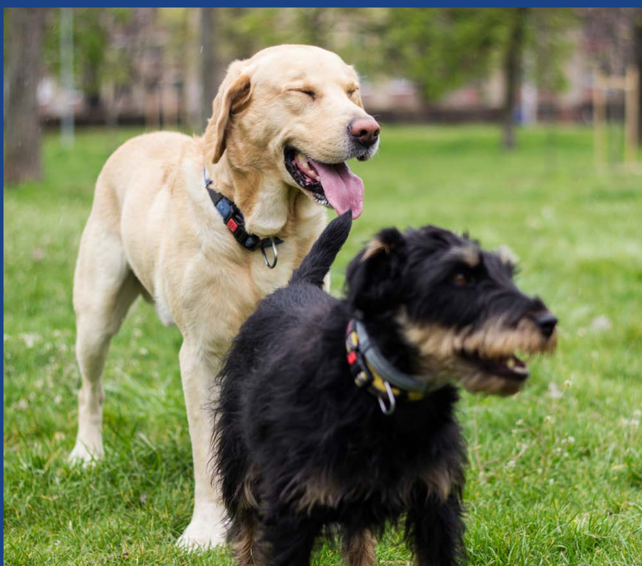
Focus on dogs

In 2021, the typical Australian pet dog is most likely a young, medium-sized pure breed, acquired through a breeder. A third of dogs were obtained for free, but costs for the remainder have increased—averaging $1,113 and rising to $1,740 for 'pandemic pups'.

There are an estimated 6.3 million pet dogs in Australia in 2021.

Half (51%) of all dogs asked about in the survey were reported to be purebred, up from 40% in 2019. Common purebreds named were Labrador and Golden Retrievers, English and American Staffordshires, German Shepherds, Jack Russells.

A third (33%) of all dogs were said to be 'mixed', down from 46% in 2019. Owners often acknowledged not fully knowing the mix breeds of their dogs—or even not knowing at all. Mixed dogs commonly identified included Staffordshire crosses, Maltese crosses, Jack Russell crosses, and Kelpie crosses.



15% of pet dogs are now reported as designer breeds, on par with 14% in 2019. Common breeds mentioned included Maltese Shih Tzu, Jack Chi, and Poodle crosses such as Cavoodles, Schnoodles, and Maltipoos.

Around a quarter (26%) of dogs weigh over 25kgs, significantly up from 21% in 2019. Another two in five (41%) dogs weigh <10kgs, and a third (33%) weigh between 10-24kgs.

Over half (55%) are aged under 5 years, significantly up from 46% in 2019—reflecting the overall increase in dog ownership in the last two years.

Two in five dogs were acquired through a breeder (40%), while another quarter came via friends, family and neighbours (24%). A further 13% have been rescued from the RSPCA or other animal shelters, 11% were purchased from pet shops, 2% each were inherited or acquired through a vet, and 1% were found as strays; the remaining 6% were acquired through miscellaneous other means. Methods of acquisition remained largely unchanged from 2019.

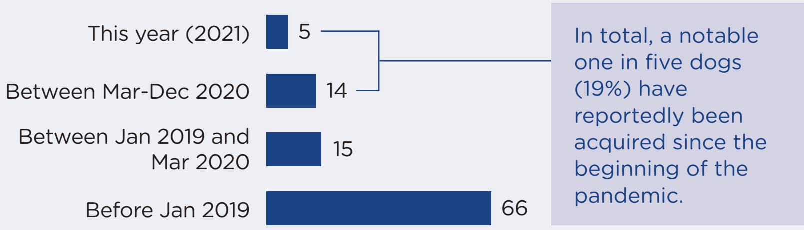
The price of dogs is on the rise, with 22% of all pet dogs in Australia costing more than $1,000 at the time of acquisition—up significantly from only 15% in 2019. While a third of dogs were acquired for free, the remaining two-thirds costed an average of $1,113—with those acquired since March 2020 averaging $1,740.

D2. What type of dog is [DOG NAME]? // D1. What is the weight of [DOG NAME]? // D3. Where did you get [DOG NAME]? // D22. How old is [DOG NAME] (in human years)? // D5B. How much did you purchase [NAME] for? This is excluding any initial costs for registration, microchipping, vaccination, etc. Base: Dogs (n=646) // NB: Most results for dogs have been re-based on the total number of dogs rather than the number of dog owners.

Acquisition of dogs

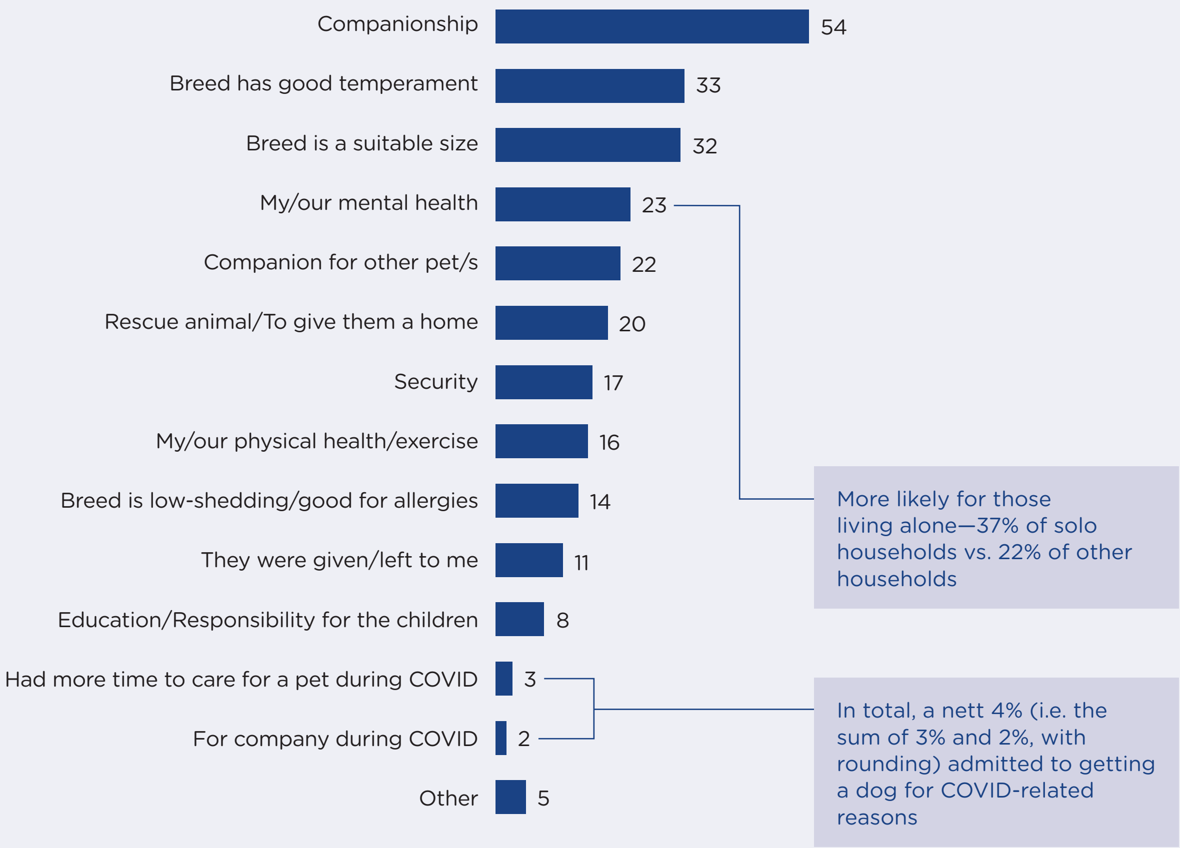
A fifth of all pet dogs in Australia have been acquired during the COVID-19 pandemic—with 53% of these by experienced dog owners. Companionship is by far the top reason for acquiring a dog, with breed temperament and size also deemed relatively important.

When did you get each dog? (%)



Those most likely to have acquired a dog since the onset of the pandemic were inner-city dwellers (28%, vs 17% other areas) and households with primary school-aged children between 6-11 years (28%, vs 17% other households).

Reasons for deciding to get each dog (%) *Multi-select response*



D21B. When did you get [DOG NAME]? // D9B. What were the reasons that made you decide to get [DOG NAME]? Base: Dogs (n=646) // NB: Most results for dogs have been re-based on the total number of dogs rather than the number of dog owners.
NB: D9B was previously asked as a single-select question about the 'main reason'. As a result, a direct comparison is not possible, as 2021 results that are markedly higher than 2019 results may simply mean those have always been supplementary reasons (e.g. only 6% were mainly chosen for 'good temperament' in 2019).

Focus on cats

As with dogs, the typical pet cat is now likely to be under 6 years of age, acquired through an animal shelter or via friends/family. Around one in two cats (48%) continue to be obtained for free, while the other half had costed an average of $372.

There are an estimated 4.9 million pet cats in Australia in 2021.

Methods of obtaining cats have remained consistent since 2019—most commonly through animal shelters (27%) or friends/family/neighbours family (25%). These were followed by breeders (14%), adopting strays (12%), pet shops (9%), vets (6%), inherited (1%), and miscellaneous other means (5%).

More cats are younger, with almost two-thirds (63%) aged under 6 years, up significantly from 52% in 2019. Kittens and younger cats appear especially common at present, with a third (34%) of cats aged under 2 years—up from 25% in 2019.

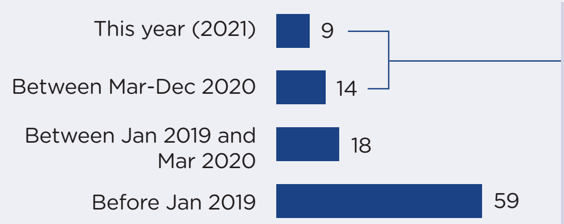
Almost half (48%) of cats were given freely—on par with 2019 results. A further third (34%) were obtained for $200 or less, compared to only 28% in 2019. The pet cats of Australia that had cost anything at all averaged $372 at the time of acquisition—rising to $410 for those obtained since the onset of the pandemic (which is a substantially lower pre-/post-pandemic cost differential than for dogs).

C2. Where did you get [CAT NAME]? // C21. How old is [CAT NAME] (in human years)? // C4B. How much did you purchase [CAT NAME] for? This is excluding any initial costs for registration, microchipping, vaccination, etc. Base: Cats (n=321) // NB: Most results for cats have been re-based on the total number of cats rather than the number of cat owners.

Acquisition of cats

A quarter of cats (24%) were acquired during the COVID pandemic—with 53% of these, as with dogs, obtained by experienced cat owners. Companionship also remained the top motivation for getting a cat, followed by rescuing the cat.

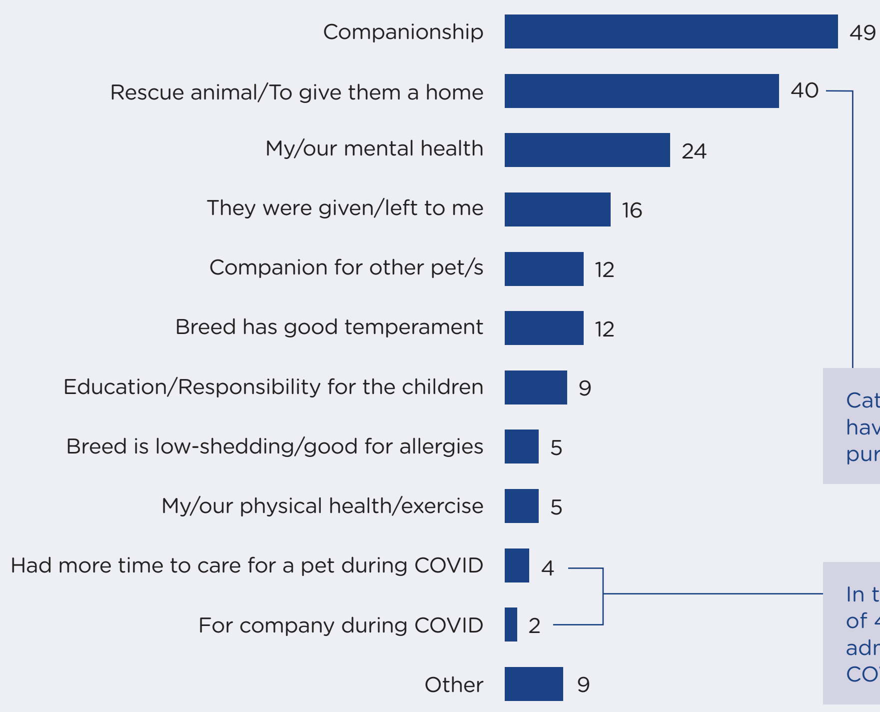
When did you get each cat? (%)



Of all pet cats currently in Australia, an astounding 24% were reported to have been obtained during the pandemic.

Those more likely to get a cat during the pandemic were those living in apartments or townhouses (35%, vs 17% of those in larger, free-standing houses), those with children under the age of 18 years (34%, vs 18% all other household types), inner-city dwellers (34%, vs 21% other areas) and renters (28%, vs 21% owner-occupiers).

Reasons for deciding to get each cat (%) *Multi-select response*



Cats were twice as likely to have been acquired for rescue purposes, compared to dogs

In total, a nett 5% (i.e. the sum of 4% and 2%, with rounding) admitted to getting a cat for COVID-related reasons

C20B. When did you get [CAT NAME]? // C8B. What were the reasons that made you decide to get [CAT NAME]? Base: Cats (n=321) // NB: Most results for cats have been re-based on the total number of cats rather than the number of cat owners.
NB: D9B was previously asked as a single-select question about the 'main reason'. As a result, a direct comparison is not possible, as 2021 results that are markedly higher than 2019 results may simply mean those have always been supplementary reasons (e.g. only 28% were mainly chosen as 'rescue animals' in 2019).

6.

Pet expenditure and shopping preferences

Expenditure on cats and dogs

On average, pet owners are spending $3,200 per dog and $2,100 per cat each year—primarily on food, veterinary services, and pet healthcare products.

Average annual household spend on pet-related categories by dog and cat owners in the last 12 months

Category	Average spend by dog owners ($) *	Average spend by cat owners ($) *
Pet food	$1,858	$1,493
Veterinary services	$617	$717
Pet healthcare products *(e.g. veterinary medicines, flea/worming treatments, dietary supplements)*	$411	$356
Products or accessories *(e.g. clothing, toys, leads, bowls, collars, carriers)*	$238	$224
Pet insurance	$246	$116
Boarding/Minding	$223	$138
Clipping/Grooming (incl. mobile shampoo)	$196	$133
Training/Behaviour/Therapy	$182	$59
Dog walking	$160	N/A
Transport	$147	$12
Participating in competitions/Club membership	$80	$43
Alternative health treatment *(e.g. acupuncture, massage)*	$58	$52
Other	$6	$14
Total average spend per household *	**$4,422**	**$3,356**
Total average spend per animal *	**$3,237**	**$2,074**

Methodology notes: The averages presented in this table include dog and cat owners who spent nothing in some categories, for ease of extrapolation to the broader population on the next page. For example, 99% of dog and cat owners reported spending money on food in the last 12 months—whereas only 59% of dog owners and 52% of cat owners reported spending money on vet bills, and 24% of dog owners and 19% of cat owners paid for pet insurance. It is for this reason that the averages presented may appear lower than expected.

Cat litter was the predominant 'other' spend for cat owners.

C17X / D18X. In the last 12 months, have you spent money on any of the following for your cat/s / dog/s? // Base: Cat owners (n=321) // Dog owners (n=499)

Expenditure on cats and dogs

When extrapolated across all dog- and cat-owning households of Australia, dog owners have spent $20.5 billion in last year, while cat owners have spent $10.2 billion.

Estimated population expenditure on pet-related categories in the last 12 months		
Category	**National spend on dogs ($m)**	**National spend on cats ($m)**
Pet food	$8,627.5	$4,523.5
Veterinary services	$2,867.8	$2,174.1
Pet healthcare products *(e.g. veterinary medicines, flea/worming treatments, dietary supplements)*	$1,909.5	$1,078.1
Products or accessories *(e.g. clothing, toys, leads, bowls, collars, carriers)*	$1,103.4	$677.3
Pet insurance	$1,143.2	$351.3
Boarding/Minding	$1,036.6	$418.9
Clipping/Grooming (incl. mobile shampoo)	$909.5	$403.2
Training/Behaviour/Therapy	$843.5	$177.5
Dog walking	$743.7	N/A
Transport	$682.7	$37.1
Participating in competitions/Club membership	$371.2	$130.2
Alternative health treatment *(e.g. acupuncture, massage)*	$269.8	$158.7
Other	$29.8	$41.7
National total spend on dog and cats	**$20.5 billion**	**$10.2 billion**

Methodology notes: The methodology for deriving household expenditure figures has been revised in this study to address potential under-estimation in previous years. Where survey participants had previously selected their spend in each category from pre-coded dollar ranges, they were asked in this survey to first choose their average frequency of spend for each category and then how much they would spend each time, on average. This methodological revision provides more accurate measures of household spend, but comparisons to previous industry estimates should be made with caution.

C17X / D18X. In the last 12 months, have you spent money on any of the following for your cat/s / dog/s? // Base: Cat owners (n=321) // Dog owners (n=499) NB: Population expenditure extrapolations have been based on estimated number of households (see footnote on page 9), following methodological revisions to calculating annual household expenditure from 2019 (see note on page 24). Note these are estimates only and should not be considered definitive quantification of total sales data, and any comparisons between 2019 and 2021 expenditure should be treated with caution.

Purchasing pet-related things

Overall, supermarkets are the most popular place to buy pet foods and treats, alongside pet shops—unless shopping for healthcare products, where vets have taken the lead; meanwhile, preferences for pet products/accessories are split evenly across channels.

Supermarkets were by far the top place for people to purchase all categories of pet food (distinguished in the survey as wet/retorted, chilled/fresh, air/freeze-dried, dry, and baked/cold-pressed), **as well as treats.** Notably, around half of all pet owners say they get the majority of their pets' dry food (53%), wet food (49%) and/or treats (49%) from supermarkets.

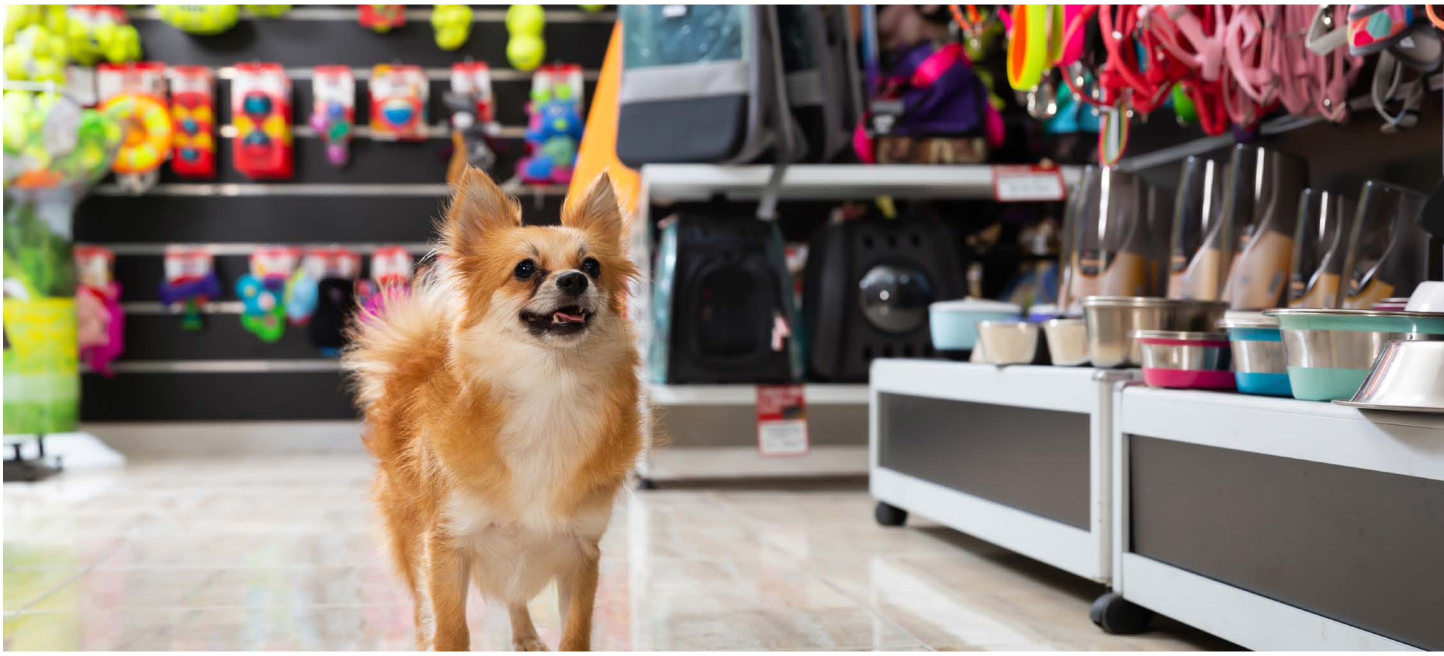
Pet shops were the next most popular, with in-person shopping slightly ahead of online shopping in most categories—albeit at much lower levels than supermarkets (e.g. 14% get the majority of their dry pet food from in-person pet shops and a further 12% get it from online pet shops). In-person pet shops, however, places equal first for **pet products and accessories**—used as the primary channel by 20% of pet owners, on par with retail shops (21% - e.g. Kmart) and supermarkets (20%).

Vets, however, were the preferred channel for pet healthcare products (30%). This was followed by online pet shops and supermarkets—with 18% of all pet owners choosing each of these channels as their primary source of healthcare products (e.g. flea and worming treatments, dietary supplements).

Discussions in focus groups suggested that pet aisles in supermarkets are considered a convenient and 'incidental' way to find pet-related items whilst shopping for other grocery and day-to-day things. Supermarkets were also seen to provide a good variety and prices when on sale.

Notably, however, vets have overtaken supermarkets as the top place to buy pet healthcare products since 2019. Similarly, retail stores have indicatively surpassed supermarkets as the preferred place to find products and accessories for pets; at the very least, the two are now on par.

During the COVID-19 pandemic, more than a third of pet owners (37%) have experienced difficulty accessing at least one product or service. First-time pandemic pet owners were more likely to have noticed experiencing a difficulty (53%, vs 35% others), as well as younger owners (50% aged under 40 years, vs 25% aged 40+) and men (45%, vs 30% women). The most common difficulties recalled were accessing at least some pet food or treats (24% of all pet owners), or veterinary services (9%).



F28. Where do you purchase or get the majority of each of the following categories for your pet/s? // F31. Since the onset of the COVID-19 pandemic (i.e. since March 2020), have you experienced any difficulties in accessing or obtaining any of the following products and services? Base: Pet owners (n=716)

Considerations for buying pet food

The most common factors considered when making purchasing decisions on pet food are the pet's own food and taste preferences, quality of ingredients, perceptions of price and value for money, and whether the food is nutritionally complete.

Factors considered when making decisions about what to feed pets (%) *Multi-select response, 6+% only*

Affordability is a strong factor when choosing pet food. Price was more likely to be considered by those who live in rural or regional areas (47%, vs 36% in urban or suburban areas), and those with lower household incomes (47% of those earning <$50,000, vs 37% of those earning $50,000+). Separately, first-time pandemic pet owners were more likely to focus on the look and feel of the packaging (15%, vs 5% other pet owners).

In the focus groups, it was clear that people often considered multiple factors in choosing what to feed their pets. Chief among these were strong guidance from the pets themselves about what they liked or didn't like—with owners recounting stories of learning by trial and error, and some having very 'fussy' pets.

Other key factors discussed included whether the food smelled or looked good to the owners, any specific recommendations they have received (e.g. from a trusted source like a vet or the breeder), and any specific dietary requirements for the pet in question (including whether it was for the right breed, size or age).

While price and sales featured in these qualitative discussions, these cost-related issues were less pronounced than in the survey results. Instead, many focus group participants almost treated cost as a secondary issue and instead spoke about wanting the best for a beloved member of a family—e.g. some pet owners noting that they ensured a rotation of foods so that the pet didn't get bored ("because I wouldn't eat the same thing everyday!").

"My cat just had major dental surgery, and because of that we're changing to wet food. And I want to get him the good stuff, so it's very expensive."

New cat owner

"I give my dog a mix just because they get bored, to break it up. I've kept the same brand [of pet food] since we've had it, I have tried others but it doesn't work for them. But they get variety, like chicken and meat."

Experienced dog owner

F29. Which of the following factors do you consider when making decisions about what to feed your pet/s? Base: Pet owners (n=716)

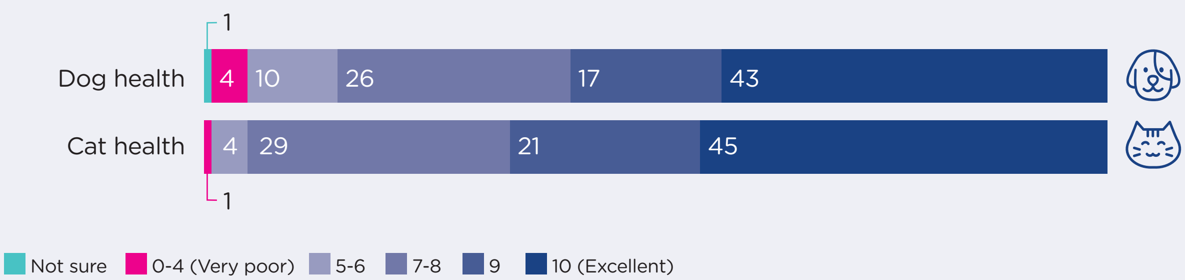
7.

Pet healthcare

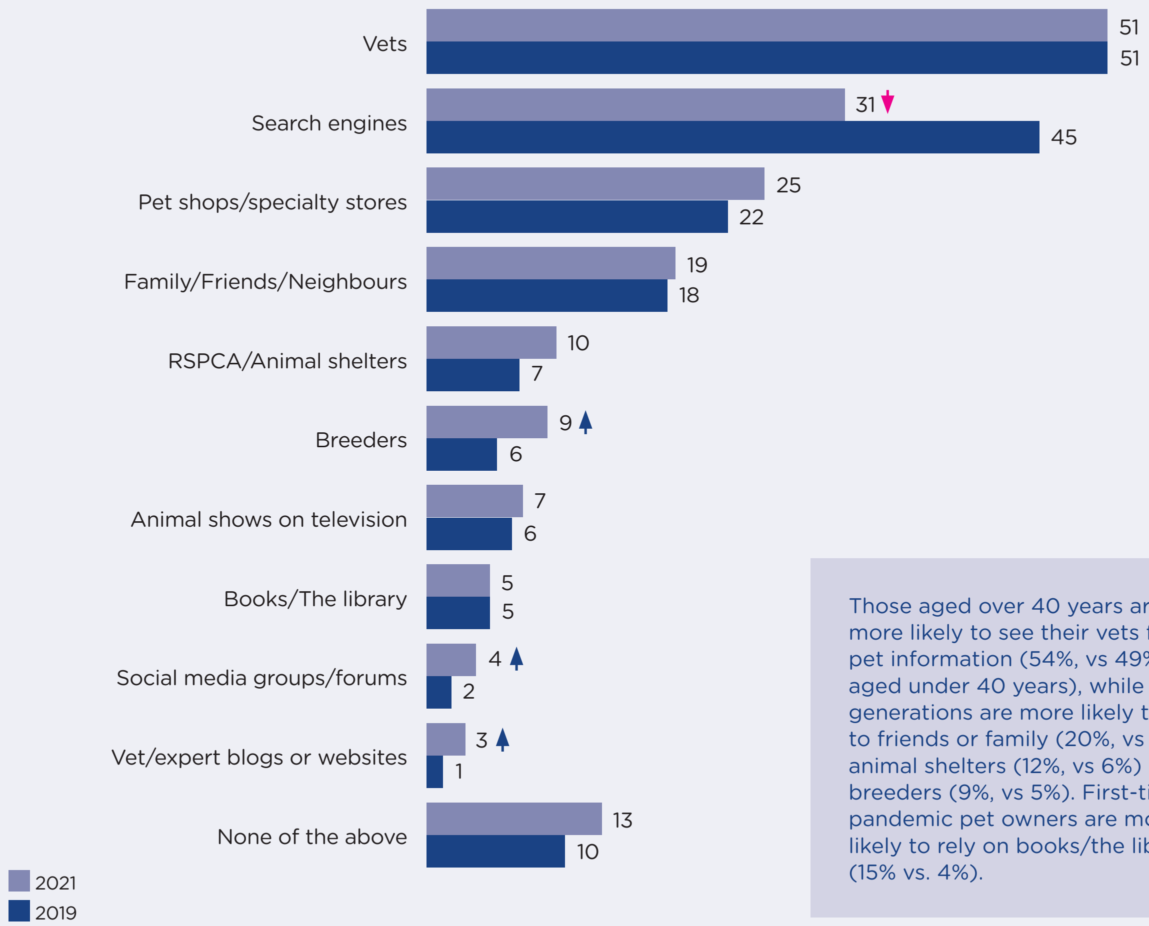
Pet health and information sources

Vets remain the top source of information for pet-related issues, relied on by 51% of all pet owners. At lower levels, there is growing reliance on information from breeders, social media forums or groups, and blogs/websites maintained by vets or experts.

Rating of current pet health (%)



Sources of information for pet related issues (%)



Those aged over 40 years are more likely to see their vets for pet information (54%, vs 49% aged under 40 years), while young generations are more likely to turn to friends or family (20%, vs 17%), animal shelters (12%, vs 6%) or breeders (9%, vs 5%). First-time pandemic pet owners are more likely to rely on books/the library (15% vs. 4%).

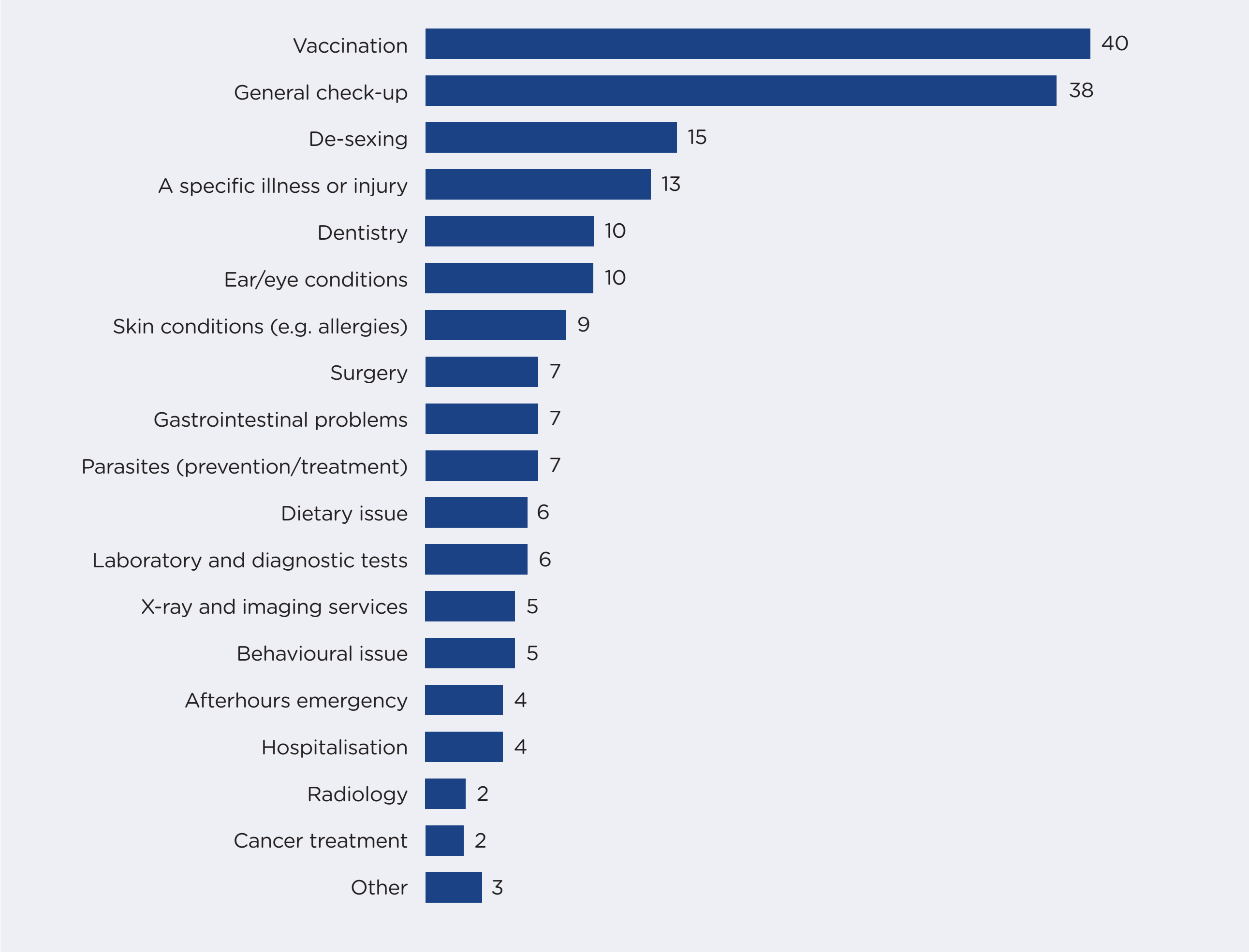
D27 / C26. On a scale of 0-10, how would you rate the current health of [DOG / CAT]? // F14. Which of the following sources of information do you mainly use for pet-related issues? // Base: Dogs (n=646) // Cats (n=321) // Pet owners (n=716) // NB: Most results for cats and dogs have been re-based on the total number of cats and dogs rather than the number of cat and dog owners.

Blue up / pink down arrows indicate significant difference between 2019 and 2021

Visits to the vet

Pets were taken to the vet twice a year on average during COVID—most commonly for vaccinations and general check ups. Awareness of pet telehealth services appears low.

Reasons for visits to vets in the last two years (%) *Multi-select response*



The majority of all pet owners (71%) have taken their pets to see the vet at least once since the pandemic began—particularly dog owners (79%). On average, owners had taken their pets to the vet twice since the onset of the pandemic—higher again for dog owners, who have visited on average 2.5 times.

For 14% of pet owners, this was more often than before the pandemic, while 20% of pet owners went less often during the pandemic than before. Most (63%), however, reported no change in the frequency of their vet visits.

20% of pet owners haven't felt the need to visit the vet in the last two years. However, of these, only 10% indicated that they had actually checked with the vet. In addition, 4% of pet owners indicated that they don't usually visit the vet at all—regardless of any COVID-19 restrictions.

F21. In the last two years, which of the following have been reasons for your visit/s to the vet? // F23. How many times have you taken your pet/s to the vet since the onset of the COVID-19 pandemic (i.e. since March 2020)? // F24. And was this more or less often than before the onset of the COVID-19 pandemic (i.e. before March 2020)? // F26 Are you aware of your vet offering either of the following services? // Base: Pet owners who visited the vet in the last two years (n=637) // Pet owners (n=716)

Reasons pet owners haven't visited the vet

One in five pet owners haven't visited the vet in the last two years. For these owners—and anyone who considered visiting the vet less frequently—the top barriers were related to cost, already knowing what to do, and being able to resolve the issue via online sources.

Reasons for not visiting the vet, or visiting the vet less, in the last two years (%) *Multi-select response, 3+% only*

Nearly half of all pet owners (45%) said none of these barriers adjacent applied to them—i.e. they have not avoided going to the vet at all, or going to the vet less.

This means the other half (55%) have at least one reason for not visiting the vet as much as they need or perhaps should. These pet owners are more likely to be first-time pandemic pet parents (70%, vs 53% others), inner-city dwellers (69%, vs 51% others), and renters (63%, vs 50% homeowners).

When pet owners were asked about policy changes that would improve pet ownership, some made comparisons to human health and the Medicare/PBS system, acknowledging that—unlike veterinary care—the human health system is substantially subsidised.

Preventative care

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

Routine tests like obtaining baseline blood work, heartworm tests and urinalysis provide your veterinarian with important information on the health risks your pet is facing.

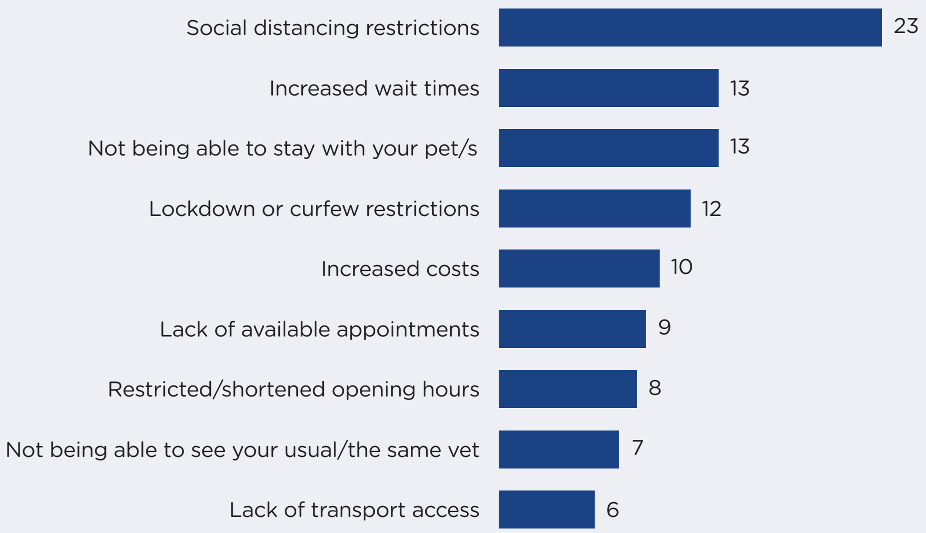
Focus group discussions highlighted some awareness of the fatal repercussions of failing to protect pets from preventable diseases such as parvovirus. Talking to your veterinarian about nutrition, dental care, vaccinations and heartworm/flea/tick preventions will help you protect your pet.

F22. In the last two years, did you consider any of the following reasons for not going to the vet – or going to the vet less often? Base: Pet owners (n=637)

Pandemic difficulties in visiting vets

During the COVID-19 pandemic, half of all pet owners recalled encountering a difficulty when visiting—or trying to visit—the vet. The top challenges experienced were social distancing restrictions, increased wait times, and being separated from their pets.

Experiences when visiting (or trying to) a vet during COVID-19 (%) *Multi-select response, 3+% only*



Overall, half (51%) of pet owners had experienced at least one difficulty when visiting or trying to visit a vet during the COVID-19 pandemic.

This was significantly more likely to be reported by Victorians (61%) compared to residents from any other state or territory (47%). Additionally, first-time 'pandemic pet parents' were also more likely to report having encountered a difficulty (70%, vs 49% others)—potentially as owners of puppies and kittens are likely to visit multiple times for de-sexing and vaccinations.

Several focus group participants who took their pets to the vet during COVID-19 lockdowns described feeling frustrated and even distressed after encountering distancing restrictions, and having to see different vets each visit. This included not being allowed into the veterinary clinic or consultation room with their pets, but rather having to wait in a car park. This brought forth concerns around not knowing the state of their pets, particularly for owners of pets with dislike or anxiety around vet visits.

> "The first time we took the cats took the vet we weren't allowed in. We didn't even know. I found it impersonal, and I didn't like it, but it was COVID."
>
> ***New cat owner***

Veterinarian workforce

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

In May 2021, veterinarians were included on the Priority Migration Skilled Occupation List—meaning that employer sponsored nomination and visa applications for veterinarians will be given priority processing.

F25. Have you experienced any of the following when visiting or trying to visit a vet during the COVID-19 pandemic? Base: Pet owners who visited the vet during COVID-19 (n=637)

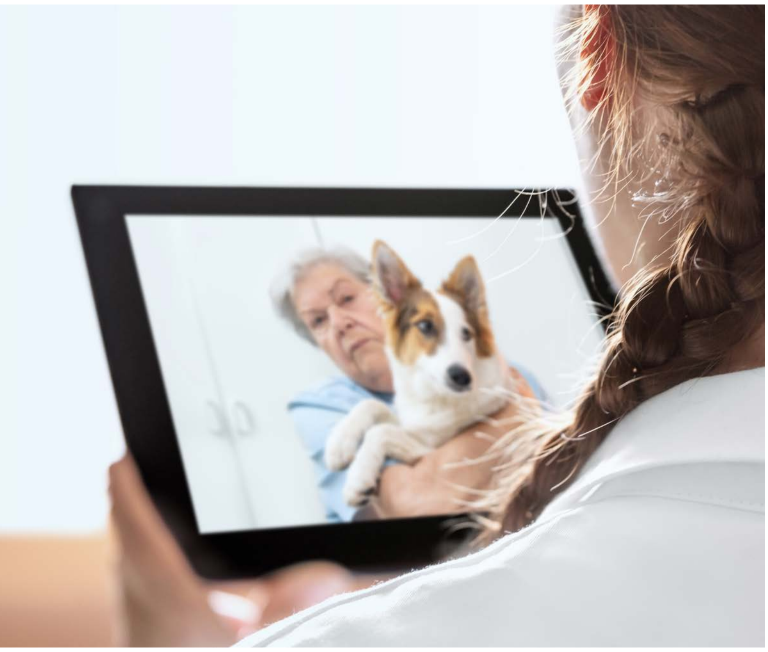
Telehealth for pets

While awareness of telehealth services is limited, pet owners in the focus groups said they would consider the option where appropriate—and would expect to pay a lower-than-usual consultation fee.

In 2020, the Federal Government introduced telehealth services through the Medicare Benefits Scheme with more than $2.9 billion in benefits paid and more than 83,540 providers using telehealth services. Telehealth funding was extended in the 2021 Federal Budget(6). The take up of telemedicine for pets appears to be lagging behind the take up in human health.

The use of telemedicine services in Australia appears to be lower than in other international markets. A HealthforAnimals survey of 3,258 cat and dog owners from Brazil, the United States, France and the United Kingdom found that almost half (47%) stated that their veterinarians offered digital/remote consultations, up from 20% prior to the pandemic. Overall, 50% of owners across all surveyed nations said they would like their vets to offer digital/remote consultations and 60% were willing to pay for veterinary advice through these services(7).

(6) https://www.health.gov.au/ministers/the-hon-greg-hunt-mp/media/universal-telehealth-extended-through-2021
(7) https://healthforanimals.org/downloads/content/global_pet_survey_results.pdf



When prompted about pet telehealth, more pet owners were aware of the idea of impromptu consultations over the phone (37%) than of scheduled consultations via call or video (26%).

Younger generations tended to be more aware of both services (59% aged under 40, vs 41% aged 40+ each).

Focus group discussions indicated that most pet owners would at least consider using pet telehealth services, depending on the issue and situation. Participants noted the limitations of telehealth due to the inability for vets to physically examine a pet, but recognised the convenience and reassurance that telehealth can provide for general pet-health related questions.

In recognising the benefits that pet telehealth could offer, most participants would expect to pay for the service. However, they thought it should be a lower consultation fee than a standard, in-person visit due to what they presumed to be limitations of the medium. One participant suggested that any telehealth consultation should be charged on a pro-rata basis in accordance with a vet's hourly rate, though there was an expectation that a cost should only be applied to 'full' consultations; a 30-second check in call, for example, wouldn't warrant a consultation fee.

> "I think [using telehealth] depends on the problem. I'm not confident the vet would be able to get a read without handling the cat. Unless it's like general health things."
>
> ***New cat owner***

F26. Are you aware of your vet offering either of the following services? A) Impromptu consultations over the phone – e.g. a quick call for advice or to determine whether it's serious enough to take your pet into the clinic. B) Scheduled consultations via video call, phone or online messaging – e.g. to provide diagnosis and advice on non-urgent or behavioural issues
Base: Pet owners (n=716)

8.

Policy reform

What next in pet policy?

Pet owners are responsible for the health, welfare, wellbeing and care of their pets. The responsibilities and duties that accrue—as well as the myriad benefits associated with pet ownership—raise important questions about federal, state/territory and local government policies that impact on pets and their owners.

With 69% of Australian households now including a family pet, there is a large proportion of society experiencing the benefits of pet ownership. All levels of government should consider how sensible policies regarding pet ownership could be adapted to maximise benefits for owners. It is time for public policy makers to properly consider the needs of these households, and ensure that policies empower pet owners to meet their ownership responsibilities.

The benefits of pet ownership have been recognised in many jurisdictions around Australia. Changes to tenancy rules, access to public transport and other services mean that more people are able to obtain the benefits of pet ownership.

The needs of our pets in public spaces are also emerging on the agenda with investment in public infrastructure like dog parks[8] that support pet ownership. Public discussions on animal friendly services and public spaces including transport have continued.

Throughout the COVID-19 pandemic, an increase in working from home has facilitated millions of pet owners to spend time with their new and existing pets.

Flexible working arrangements, pet friendly work environments and even the concept of 'pet-ernity' leave policies are amongst options to increase accessibility of pet ownership and strengthen the human-animal bond.

A maturation of the public policy discussion as pet ownership has grown should encourage jurisdictions to harmonise pet-related legislation.

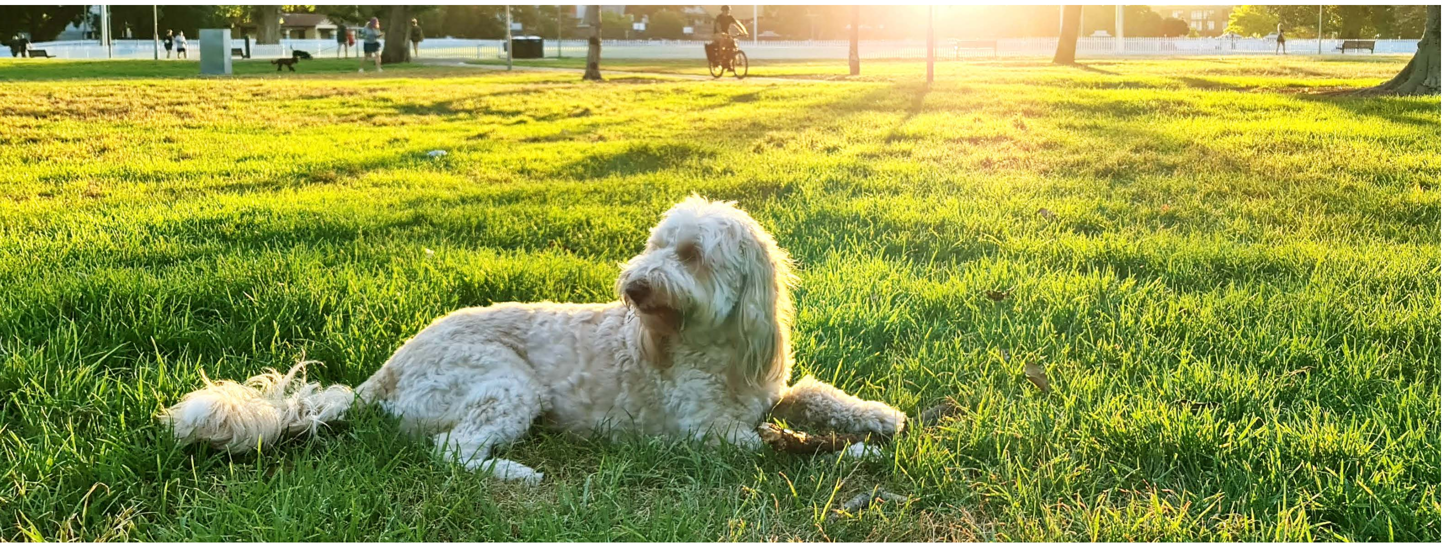
An essential service

Pet owners have a duty and a legal responsibility to ensure their pets' welfare needs are met. This responsibility should always be facilitated by public policy makers.

Throughout the COVID-19 pandemic, there have been a variety of restrictions imposed on Australians in all jurisdictions. In most cases, it has been clear that caring for animals has been considered an "essential service". Veterinary clinics around the country updated policies to ensure animal health services could still be provided, sometimes with 'contactless' delivery. In a few circumstances the delivery of pet services such as grooming was not allowed.

(8) https://www.premier.vic.gov.au/dog-parks-get-bark-approval-citys-south-east

The COVID-19 pandemic has focussed attention on our pets for may Australians. With an estimated 30.4 million pets across Australia, meeting their physical and health needs is essential to protecting their welfare.



Australian Polling Council methodology disclosure statement

This research was conducted by Newgate Research on behalf of Animal Medicines Australia between the 13th April and 13th May 2021.

The target population for the research was Australian residents (all states and territories) aged 18 years or above.

The research comprised 4 x focus groups with n=21 participants (in total) and a 15-minute self-complete online survey with n=1,017 participants.

Survey participants were sourced from databases via the Lucid marketplace. Qualitative participants were recruited by Research Connections. Participation was on a voluntary, opt-in basis.

Weighting was applied to the survey dataset to more accurately reflect the target population, using rim weighting (or raking).

The data set was weighted to match population data from the Australian Bureau of Statistics' Census 2016 on household location and size (for findings relating to household traits), and by location, age and gender (for results relating to individual attitudes and behaviours). The weighting approach was consistent with that used in the 2019 study.

For sample weighted by household location and size, weighting efficiency was around 94% for most survey estimates; that is, the effective sample size for most estimates was around 94% of the actual sample size (i.e. n=954 for estimates made on the total sample). For sample weighted by location, age and gender, the weighting efficiency was around 93% for most survey estimates, with effective sample size for most estimates at n=945 for estimates made on the total sample. Using the effective sample size, the maximum margin of error for estimates made on the total sample is +/- 3%.

All population extrapolations by total households or persons for 2021 have been based figures drawn from the ABS Household and Family Projections (cat. no. 3236.0) and the ABS's 'Population Projections, Australia, 2017-2066', which placed the estimated number of households nationally at 9,955,106 under a medium-growth scenario, the total population at 26,301,274, and the number of adults at 20,429,953.

The full question wording used in the survey is included within the footnotes of the report. For multiple choice questions and statement grids, the order of response options and statements was randomised to avoid potential order effect.

The research was undertaken in compliance with the Australian Polling Council Quality Mark standards which can be viewed here https://www.newgatecomms.com.au/disclosure-statements/

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