



# Pet Ownership Study



Ireland Report



March 2015

Job Number: 14-028090-01

**MARS**

**Objective:** *To obtain a robust read on the pet population and pet ownership in Ireland*



**Fieldwork period:**

**October/November 2014**

### Content

- **Pet ownership and pet profiling**
- **Pet life stages**
- **Owners relationship with pets**
- **Pet gifting**
- **Pet feeding**
- **Pet owner demographics**

### Methodology & Sample:



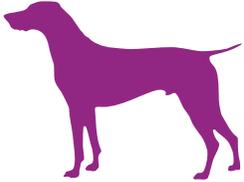
**Online survey**

**A nationally representative sample of 2000 households**

*The survey was weighted on, gender, region, urban/rural split, working status, number of people in household and presence of children in household to ensure our data is representative of households in Ireland*



Ireland is more of a **dog market** than a cat market



The majority of dogs and cats are fed at least some **manufactured food**.

Cats are predominately fed on a mixed diet, whereas dogs are equally likely to be fed mixed or just dry food



Dogs are more likely to be fed **treats** than cats by their owners. The main reasons for treating dogs are to **reward them, show love** and for **functional reasons**, such as help with teeth cleaning, giving medication and training.



Most cats and dogs were bought by their owners when they were a puppy or a kitten. Very few were bought as adult or senior dogs



Owners say that **healthy skin/coats, no digestion issues and vitality** are the key indicators that their pet is in good health

Few pet owners visit their vet primarily for advice on how to take care of their pet. However, some pet owners say that a recommendation from a **vet** is the **best indication** that the food they use is good for their pet's health

Owners tend to have a **closer** relationship with their **dogs** than cats



Both pet owners and non-pet owners are most likely to have bought their own pet or someone else's pet a gift for **Christmas**. They are also most likely to be interested in purchasing a gift for Christmas in the future



Cat ownership is skewed towards people who owned a **cat during their childhood**



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# Core Findings

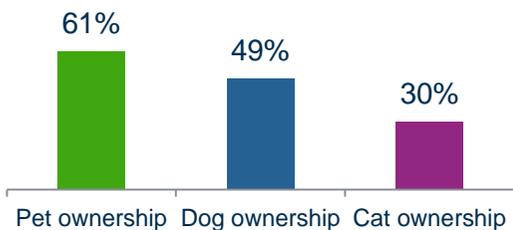


Ireland

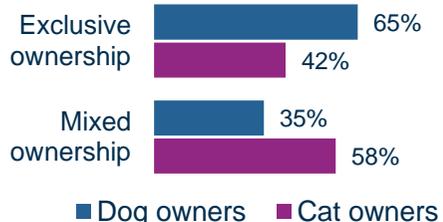


## 2014

All Households : n=2000



Dog owners : n=978  
Cat owners : n=587



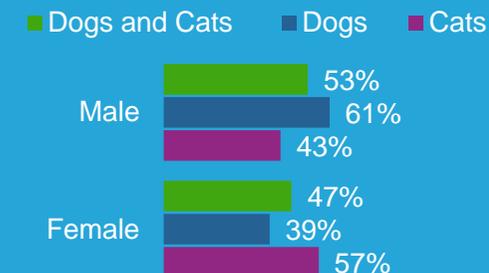
Dog owners : n=978  
Cat owners : n=587

Average number of pets owned

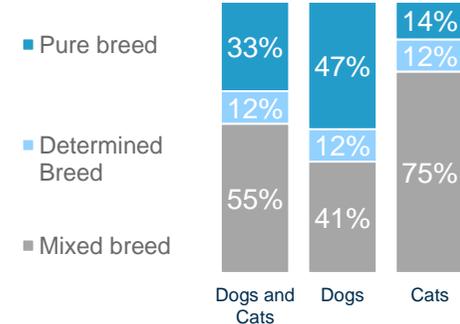


## 2014 - All pets

All Dogs : n=1235  
All Cats : n=817



All Dogs : n=1304  
All Cats : n=961

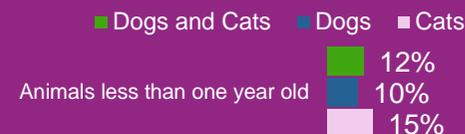


All Dogs : n=1285  
All Cats : n=973

Average age (Years)



All Dogs : n=1304  
All Cats : n=961

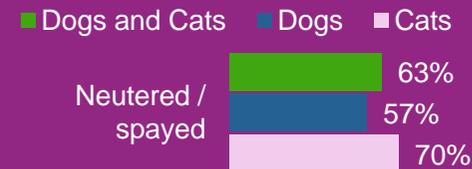


All Dogs : n=1300  
All Cats : n=918

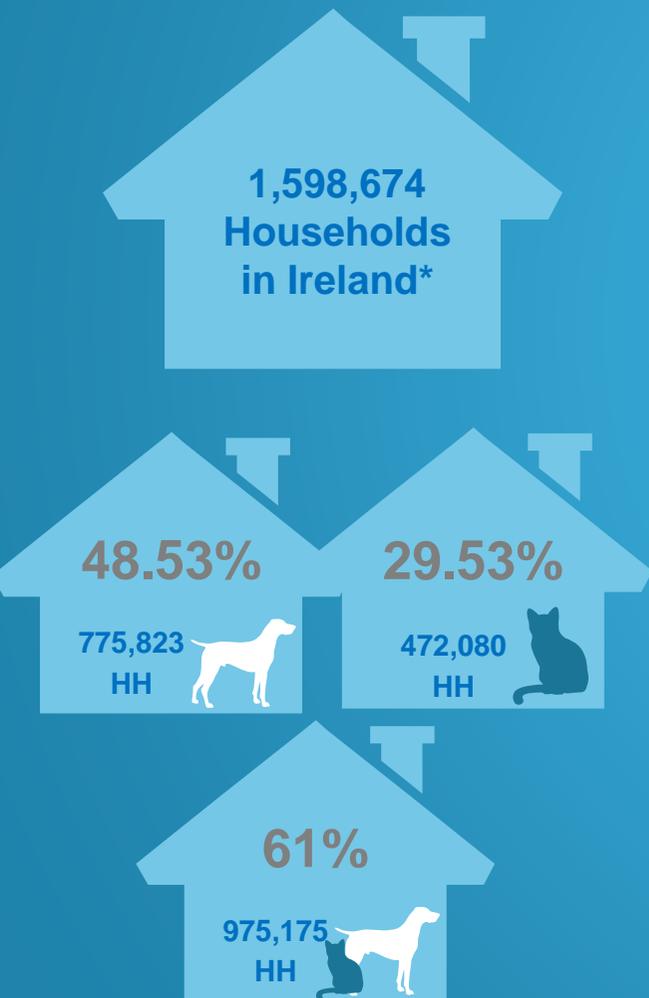
Average weight (KGs)



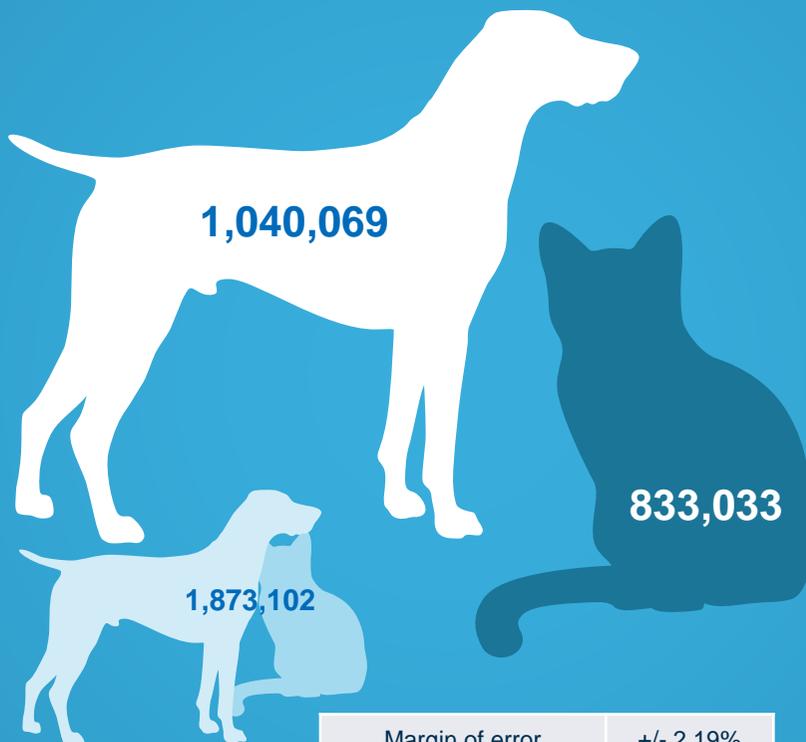
All Dogs : n=1235  
All Cats : n=817



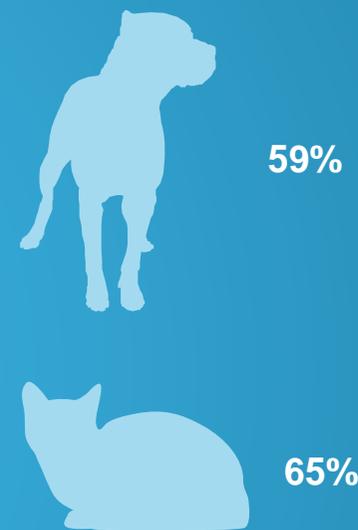
## Dog and Cat owning households



## Dog and Cat population

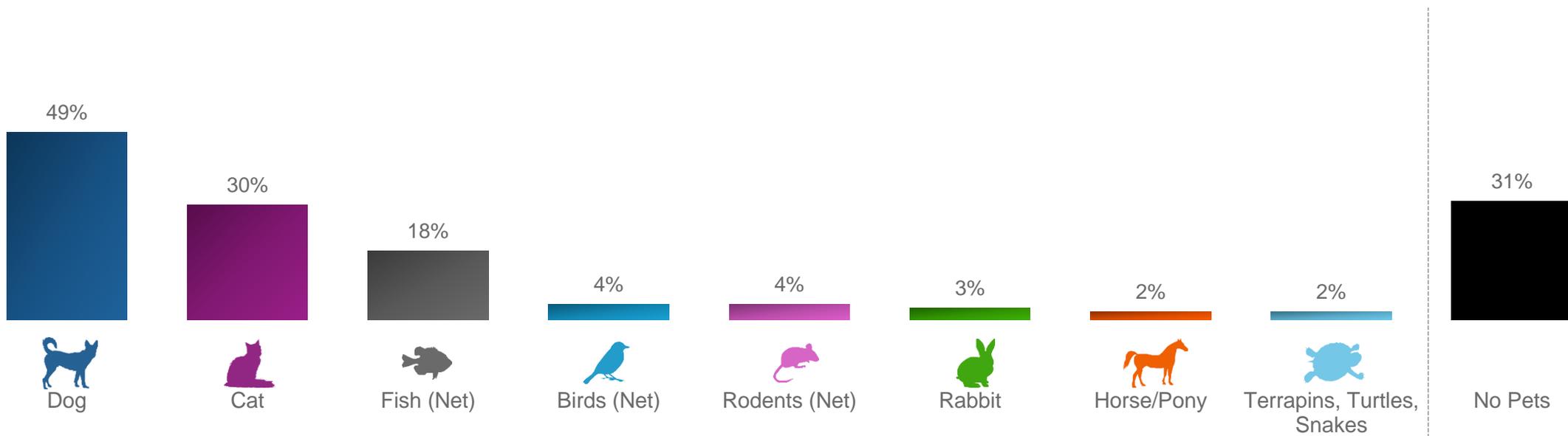


## Calorie conversion



Margin of error	+/- 2.19%
Margin of error for Dogs	22,778
Margin of error for Cats	18,243
Upper limit for Dogs	1,062,846
Lower limit for Dogs	1,017,291
Upper limit for Cats	851,277
Lower limit for Cats	814,790

## Pet Ownership

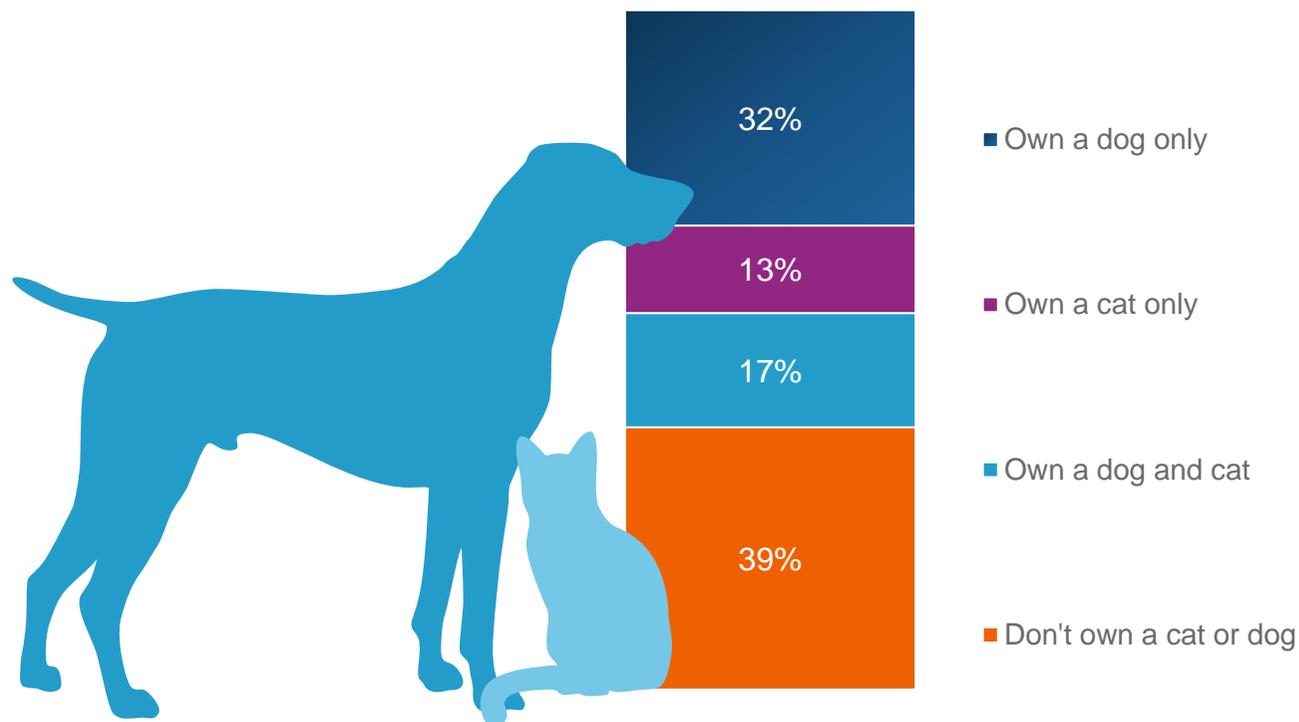


**!** 61% of households either have a cat or a dog

Base: All Households : n=2000

QPD1: Which of the pets listed below are currently owned by you or another member of your household?

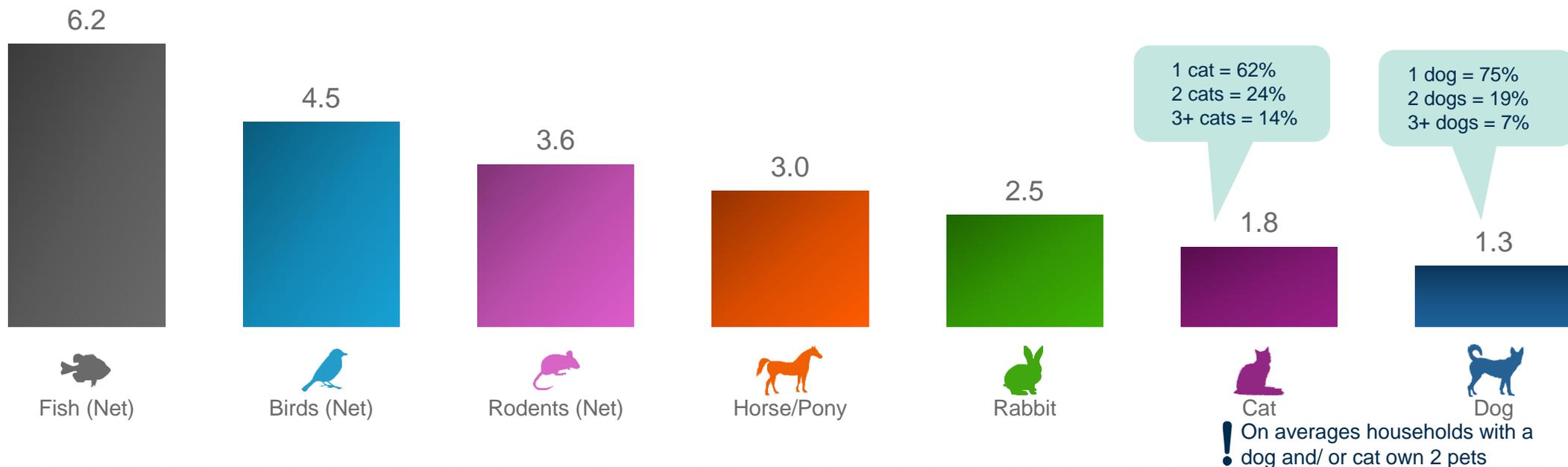
## Exclusive vs. Mixed ownership



Base: All Households : n=2000

QPD1: Which of the pets listed below are currently owned by you or another member of your household?

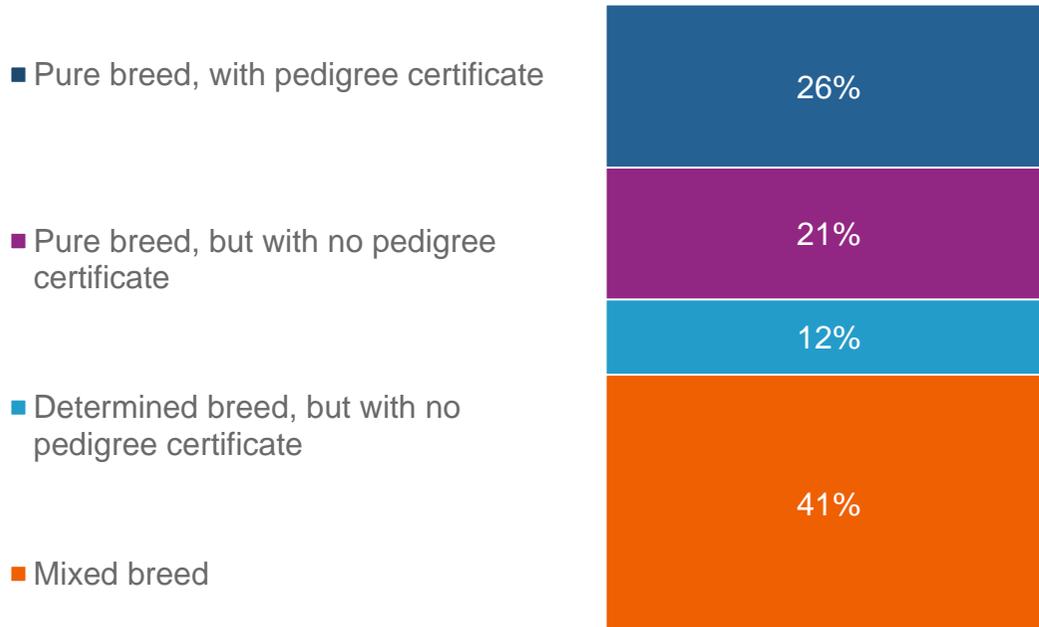
## Average number of pets per household



Base: All who own the pet. Pets with a base size less than 50 are not shown on this chart.

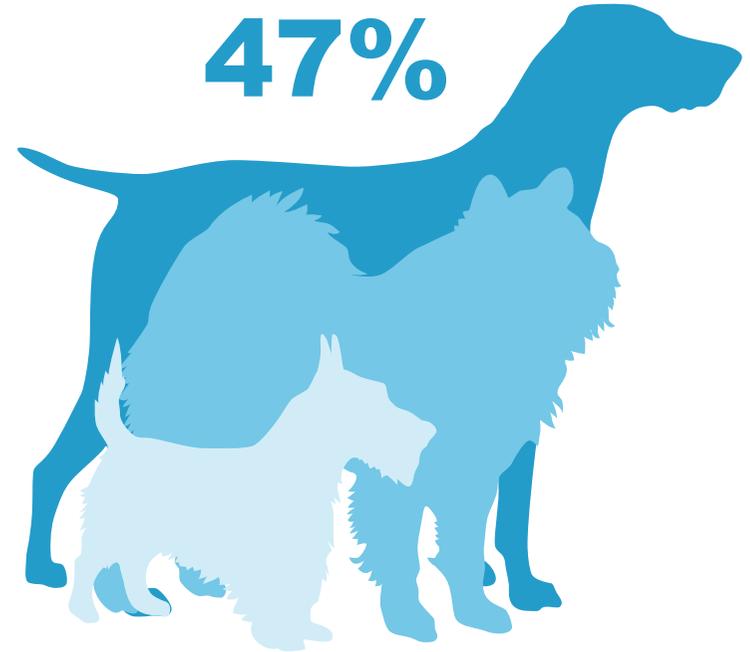
QPD2: For each of the pets that you currently have in your household, how many do you have?

## Breeds : Dogs



**Pure Breed (net)**

**47%**

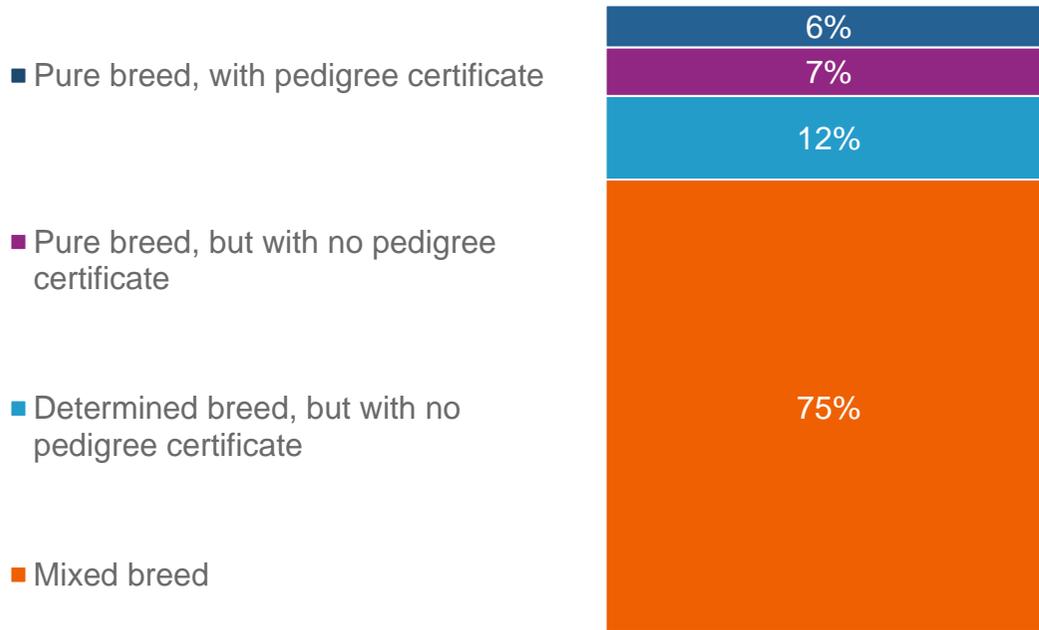


Base: All dogs n=1304

QPD4: Which of the following is he/she?

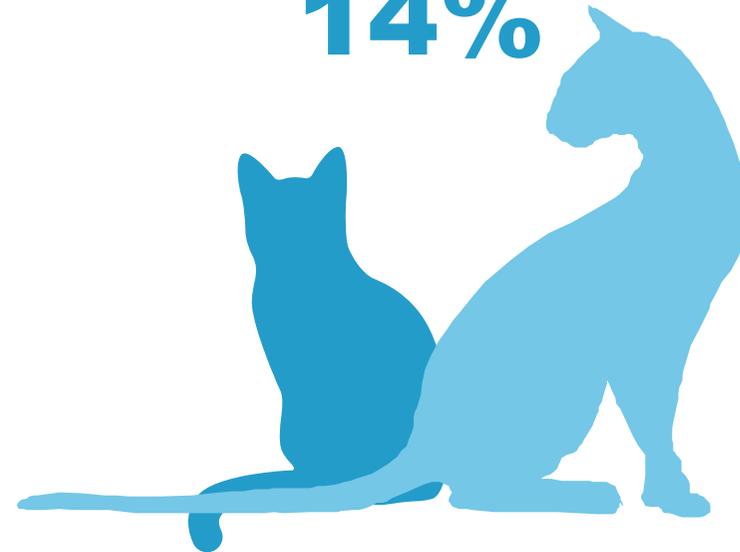
In contrast, there is a high incidence of mixed breed cats in Ireland. Pure breed cats are unusual, making up only 14% of the market

Breeds : Cats



**Pure Breed (net)**

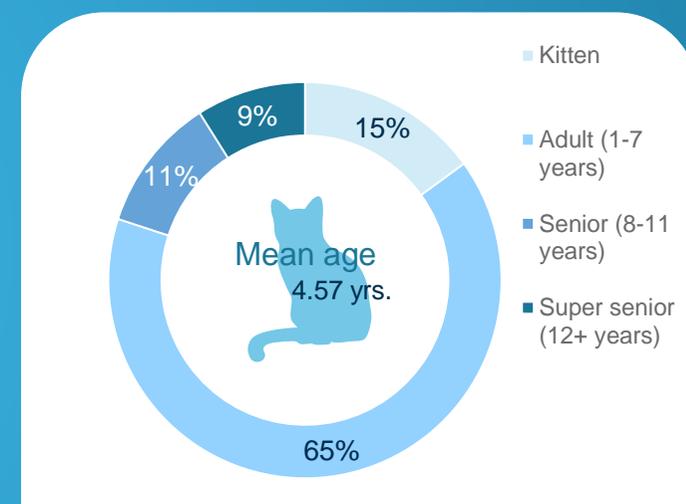
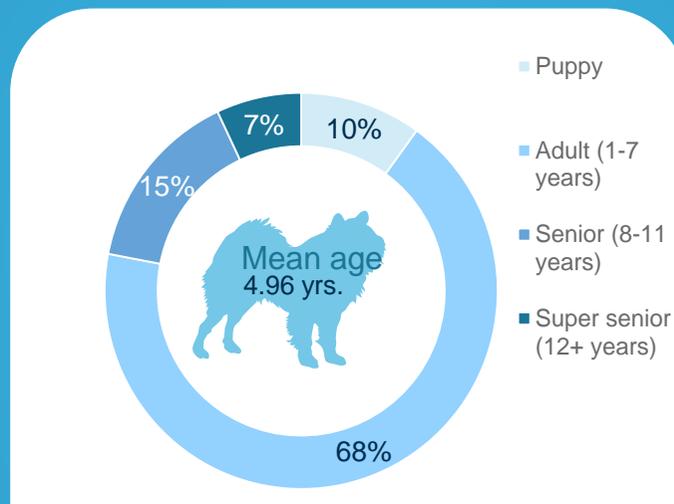
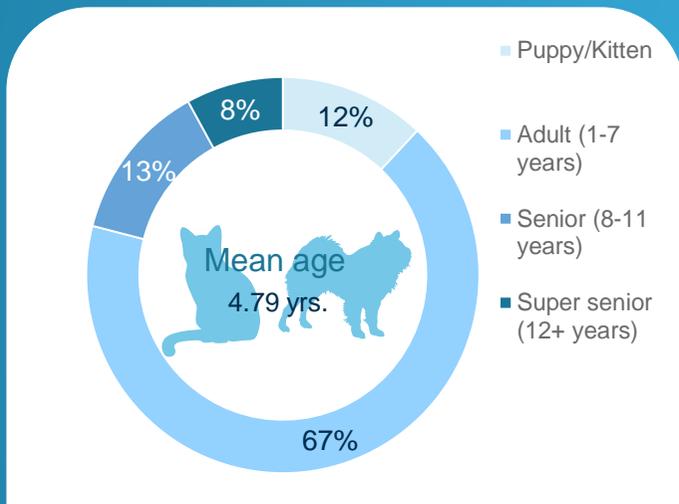
**14%**



Base: All cats n=961

QPD4: Which of the following is he/she?

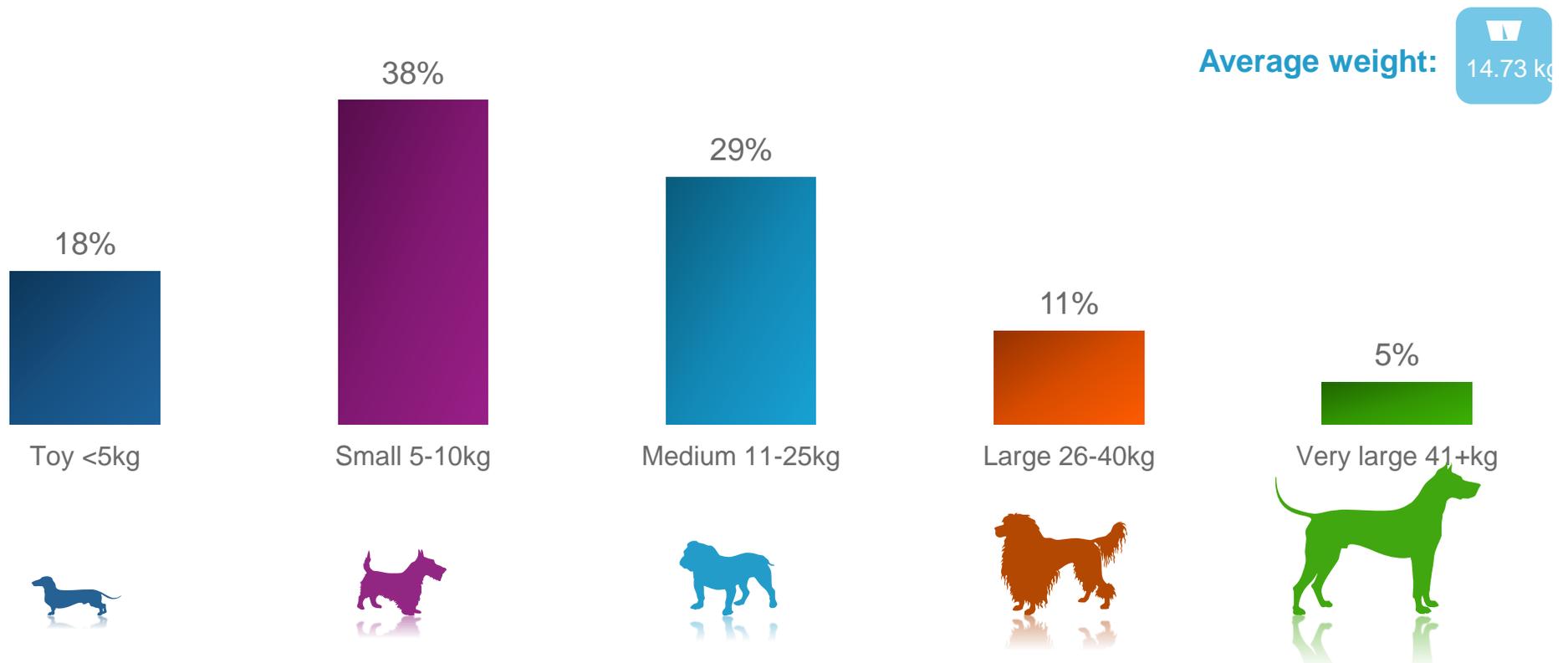
## Age of Pets: Dogs and Cats



Base: All dogs n=1304 and All cats n=961 All dogs and cats n= 2265

PD5: How old is he/she?

## Weight of Pet - Dogs



Base: All dogs n=1300

QPD7: What is the approximate weight of each pet in your household?

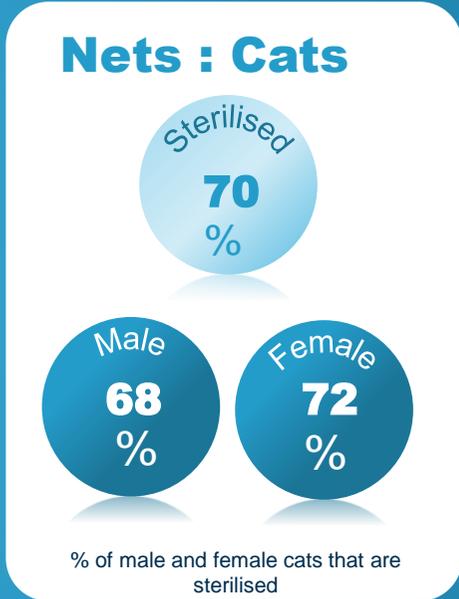
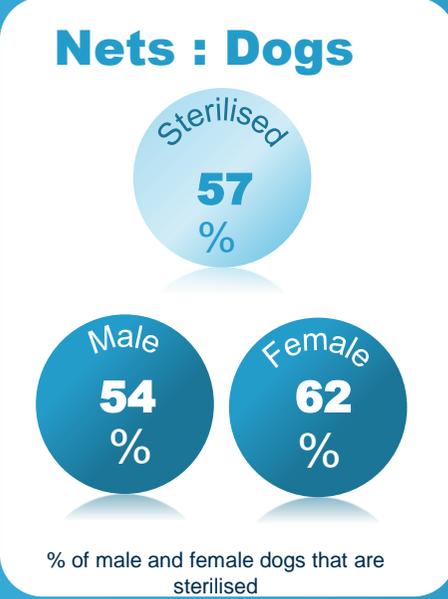
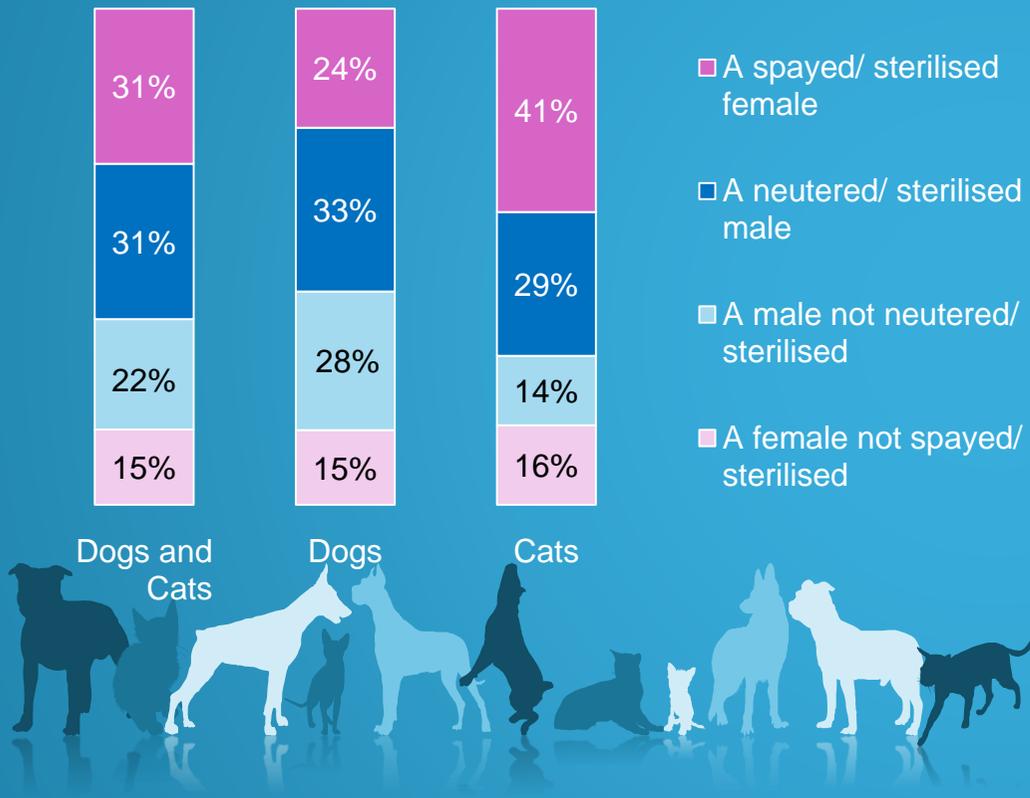
## Weight of Pet – Cats (Average weight)



Base: All cats n=918

QPD7: What is the approximate weight of each pet in your household?

## Sterilisation – Dogs and Cats



Base: All dogs and cats n=2052 All dogs n=1235 and All cats n=817  
 QPD8: Which of the following is he or she?

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# Pets Life Stages



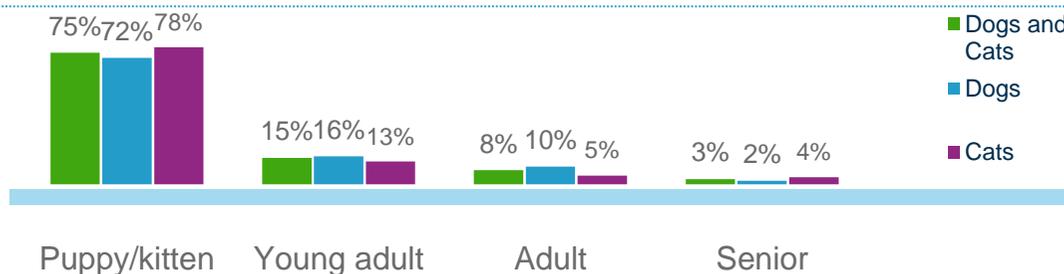
Ireland



The majority of cats and dogs were bought by their owners when they were a kitten or a puppy. Very few were bought as adult or senior cats and dogs



### Life stage when pet bought

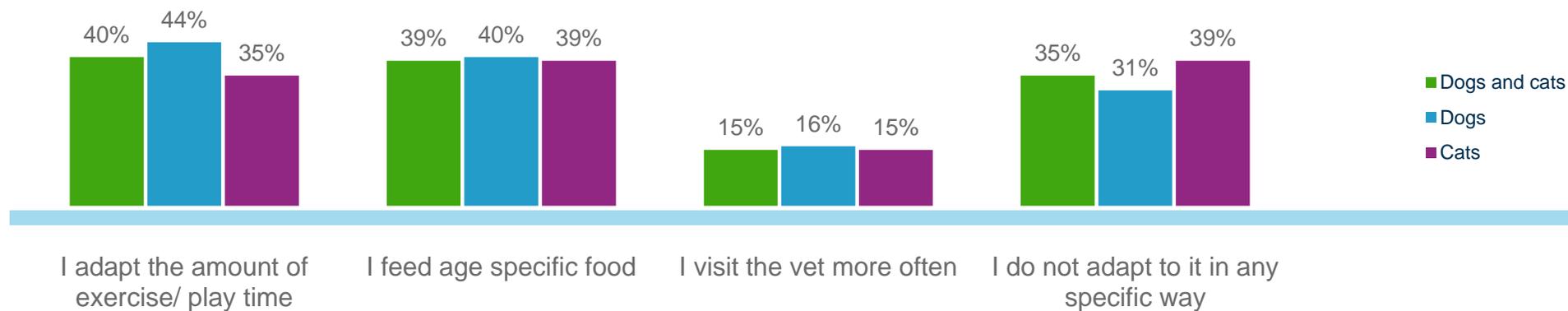


**Base:** All dogs and cats: n= 2052 All Dogs: n=1235; All Cats : n=817

**M8Q1:** At what stage in his/her life did you get your pet?



## Adapting to different stages of pet's life



Base: All dog owners who only own dogs and have a puppy or senior dog: n=417; All cat owners who only own cats and have a kitten or senior cat: n=301

M8Q3: How, if at all, do you adapt to the puppy/kitten stage or senior stage of your pet?

# Puppies and kittens are much more likely than seniors to be fed age specific food

	Puppy/ kitten	Senior	Puppy	Senior Dog	Kitten	Senior Cat
I feed age specific food	51%	32%	51%	33%	51%	34%
I adapt the amount of exercise/ play time	40%	39%	44%	44%	40%	32%
I do not adapt to it in any specific way	23%	42%	18%	42%	23%	48%
I visit the vet more often	21%	13%	21%	14%	21%	12%

M8Q3: How, if at all, do you adapt to the puppy/kitten stage or senior stage of your pet?

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# Relationship with Pet



Ireland



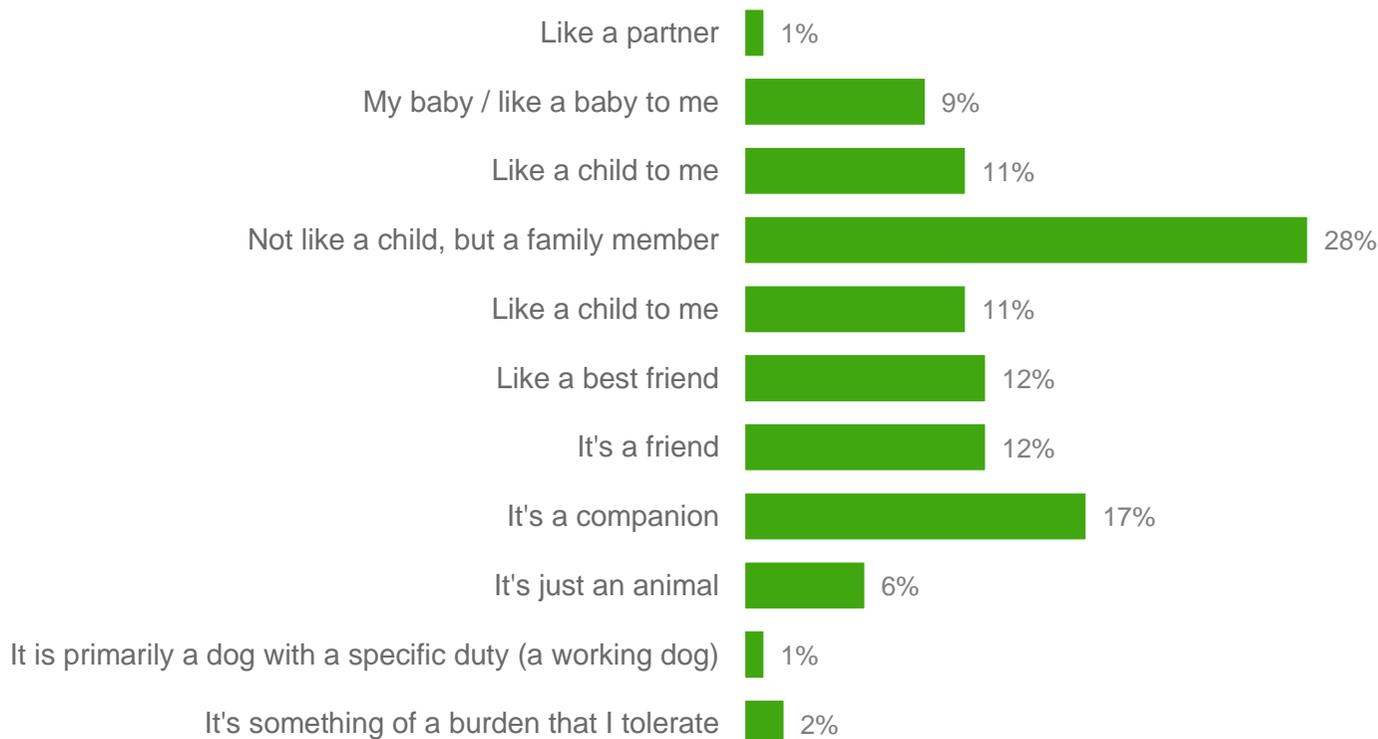
# Owners tend to regard their cats and dogs as a family member or a companion, and are unlikely to see their animal as 'just' an animal or a burden

## Relationship with Pet

Close relationship with pet



Distant relationship with pet

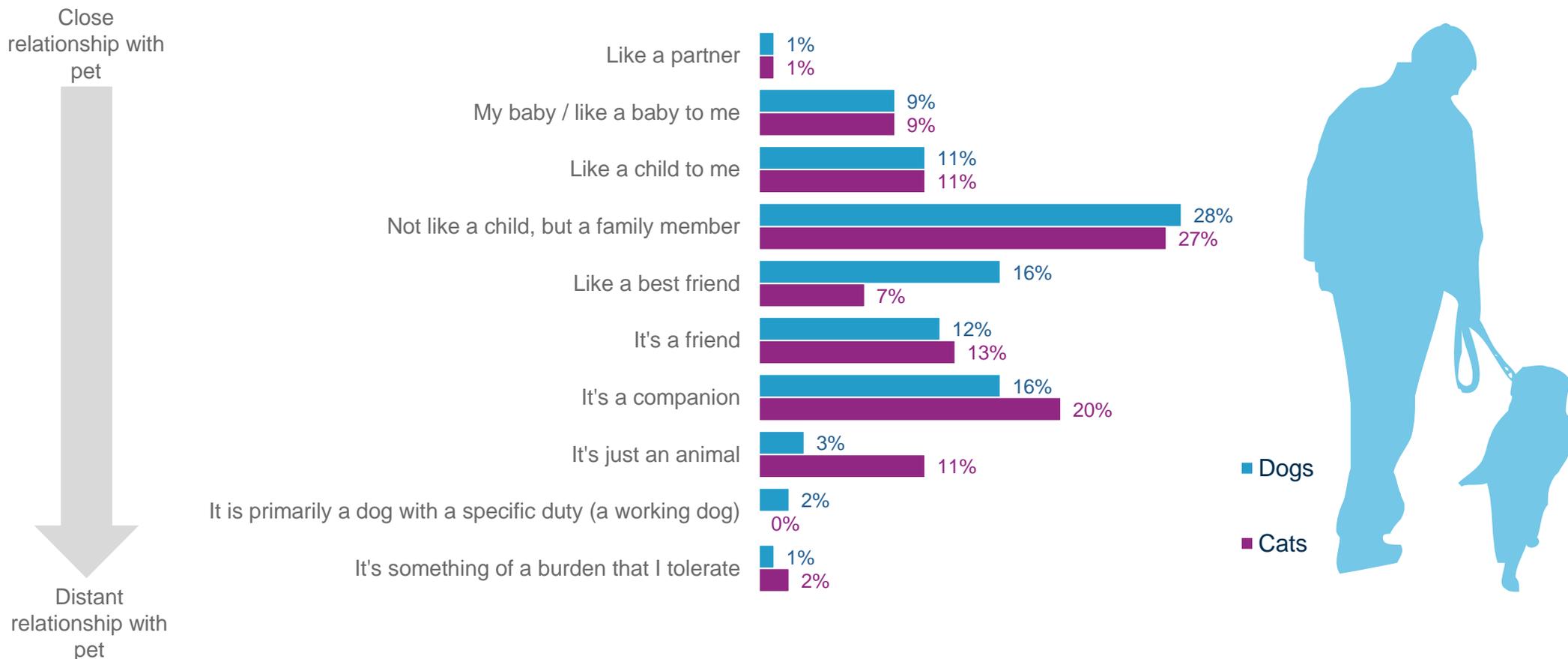


Base: All dogs and cats n=2052

M3Q2: We have conducted a lot of interviews with pet owners and discussed at length their feelings towards their dogs and cats. Here is a list of some of the most popular phrases people have used to describe their pet. Which one phrase from this list best describes your feelings for your pet(s)

Owners tend to have a closer relationship with their dogs than cats. Cats are significantly more likely to be seen as a companion or just an animal, whereas dogs are more likely to be a best friend to their owners

## Relationship with Pet

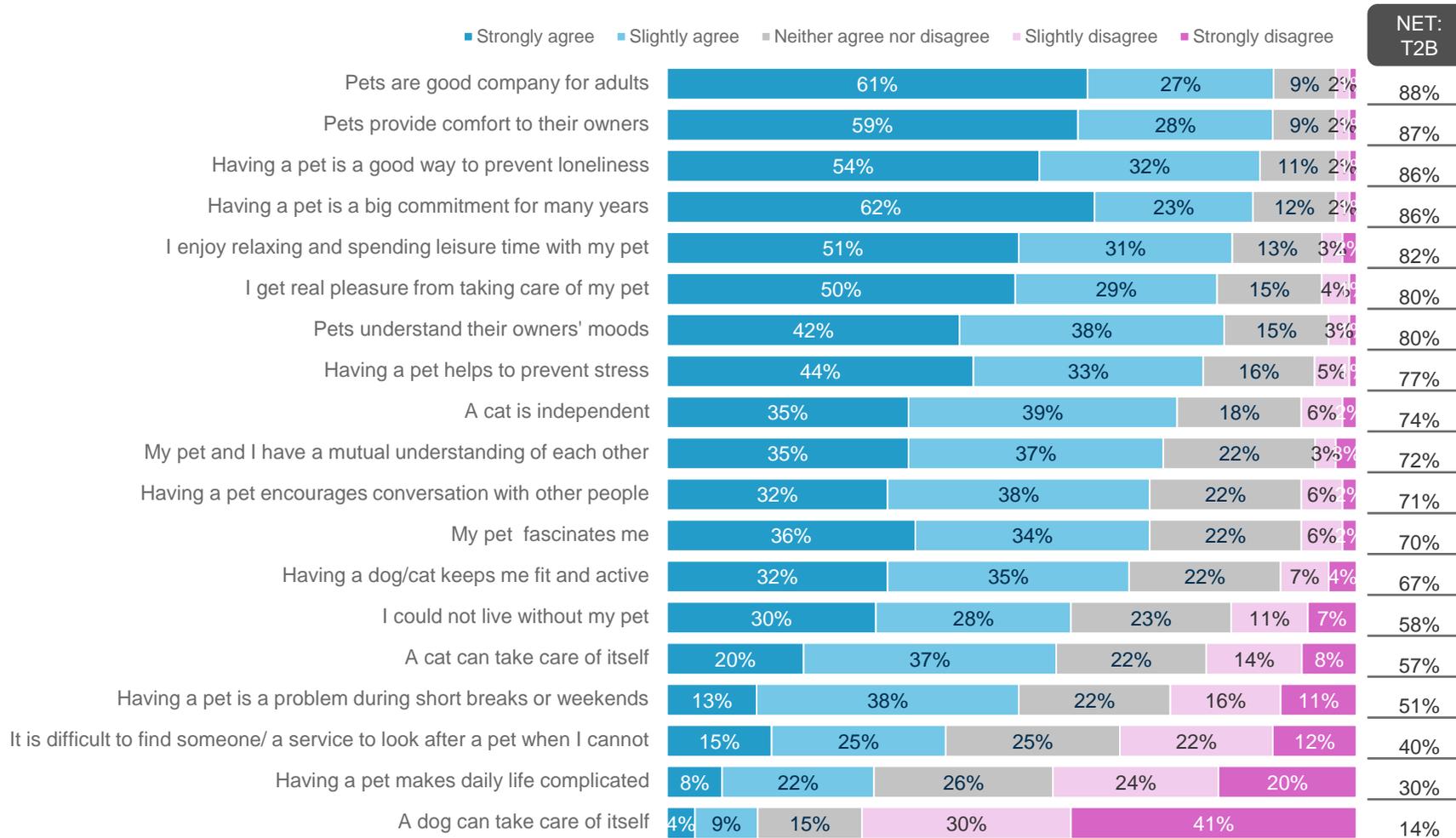


Base: All dogs n=1235 and All cats n=817

M3Q2: We have conducted a lot of interviews with pet owners and discussed at length their feelings towards their dogs and cats. Here is a list of some of the most popular phrases people have used to describe their pet. Which one phrase from this list best describes your feelings for your pet(s)

# The vast majority of dog and cat owners in Ireland think that having a cat or dog is good company for adults, provides comfort and is a good way to prevent loneliness

## Relationship with pet – dogs and cats

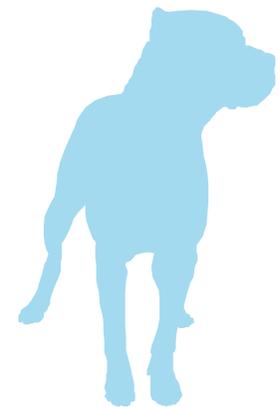
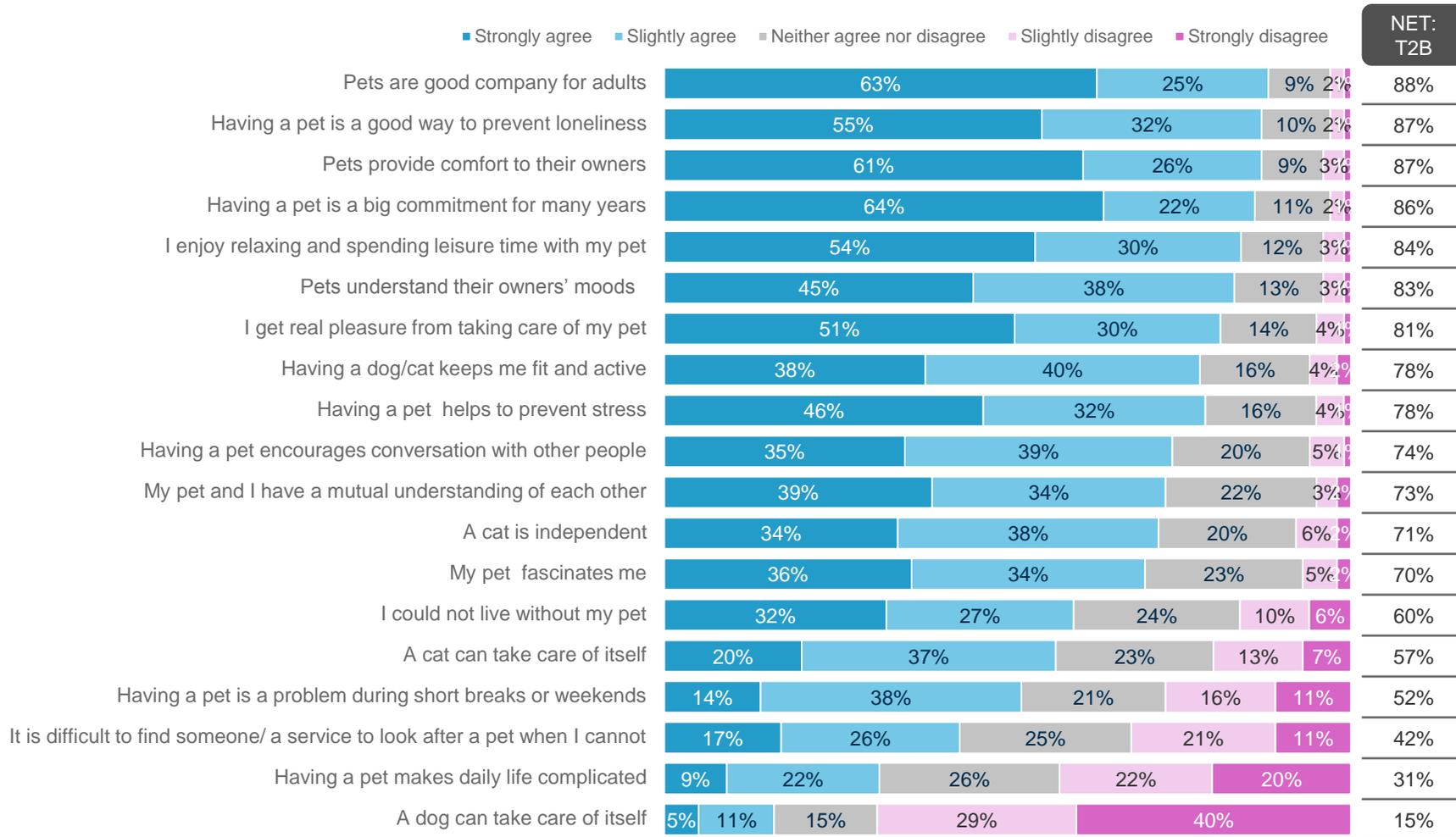


Base: All Dog and Cat owners n=1221

M3Q3: Below is a list of statements that have been made about pets and pet ownership. To what extent do you agree or disagree with each statement?

# The vast majority of dog owners in Ireland think that having a pet is a good way to prevent loneliness, they are good company and provide comfort, however they do acknowledge that pets are a big commitment

## Relationship with pet - dogs

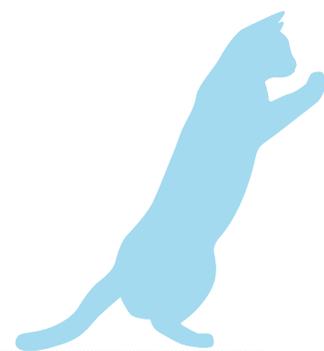
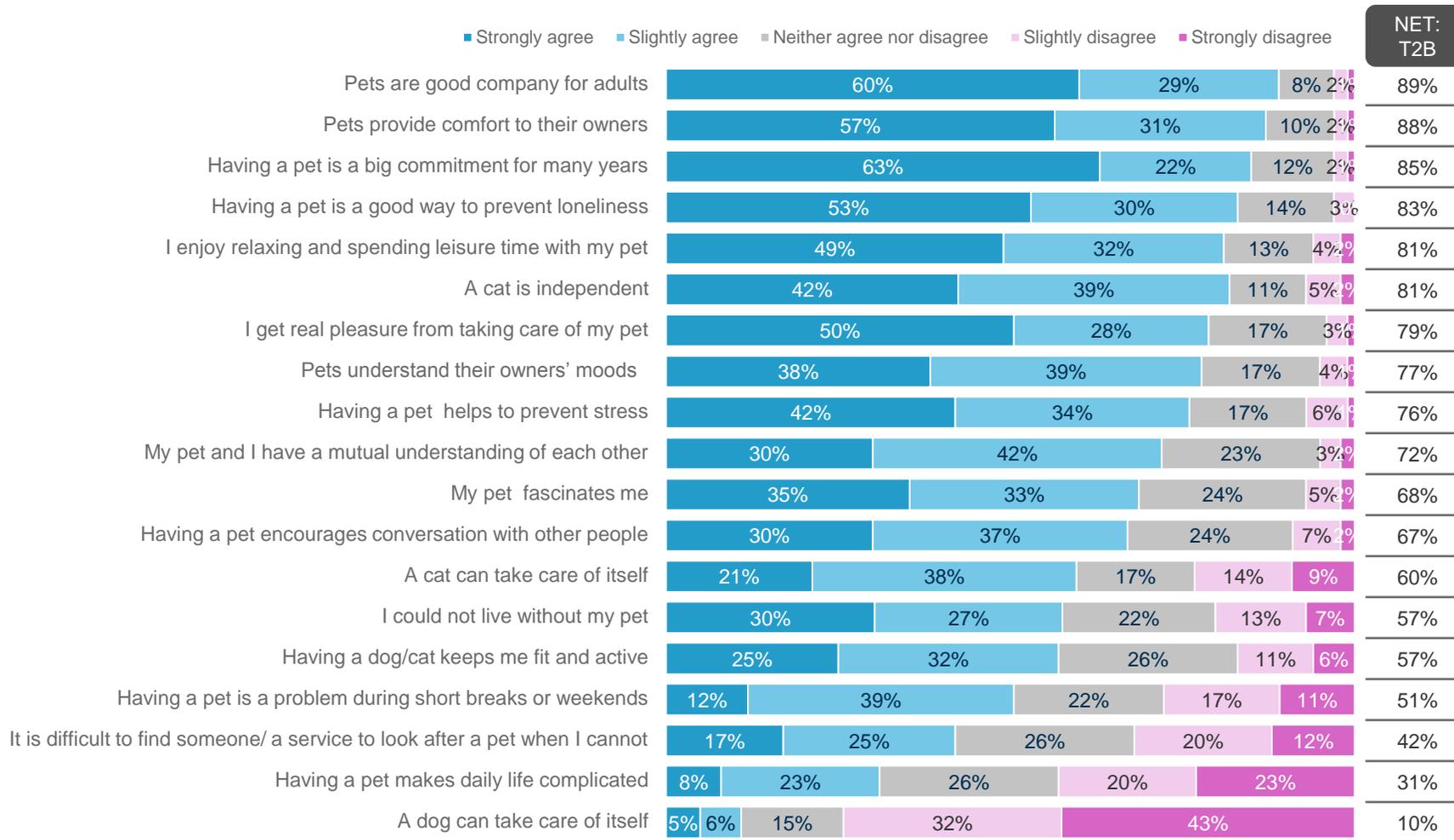


Base: All Dog owners: n=978

M3Q3: Below is a list of statements that have been made about pets and pet ownership. To what extent do you agree or disagree with each statement?

# Similarly, the vast majority of cat owners think pets are good company for adults and provide comfort. Most also acknowledge that having a pet is a big commitment for many years

## Relationship with pet - cats



Base: All cat owners n=587

M3Q3: Below is a list of statements that have been made about pets and pet ownership. To what extent do you agree or disagree with each statement?

MARS

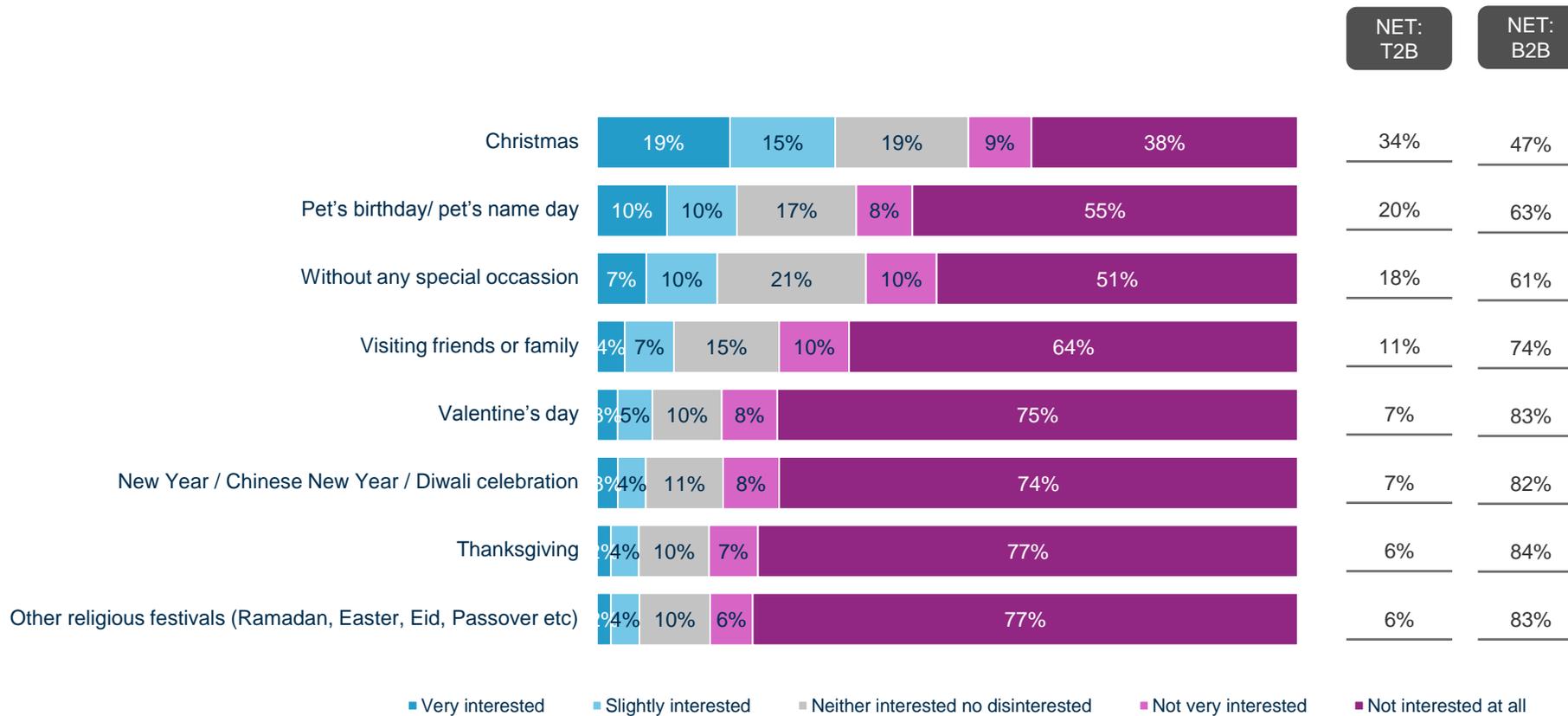
# Pet Gifting



Ireland



## Interest in buying gift for pet on occasion - general population (pet owners and non-pet owners)

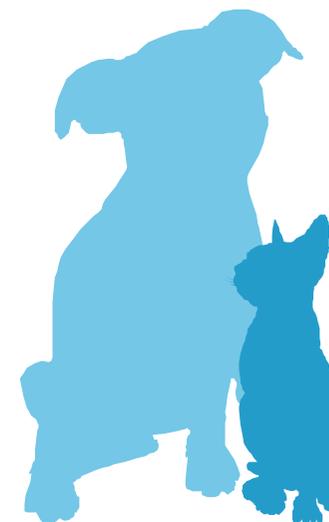
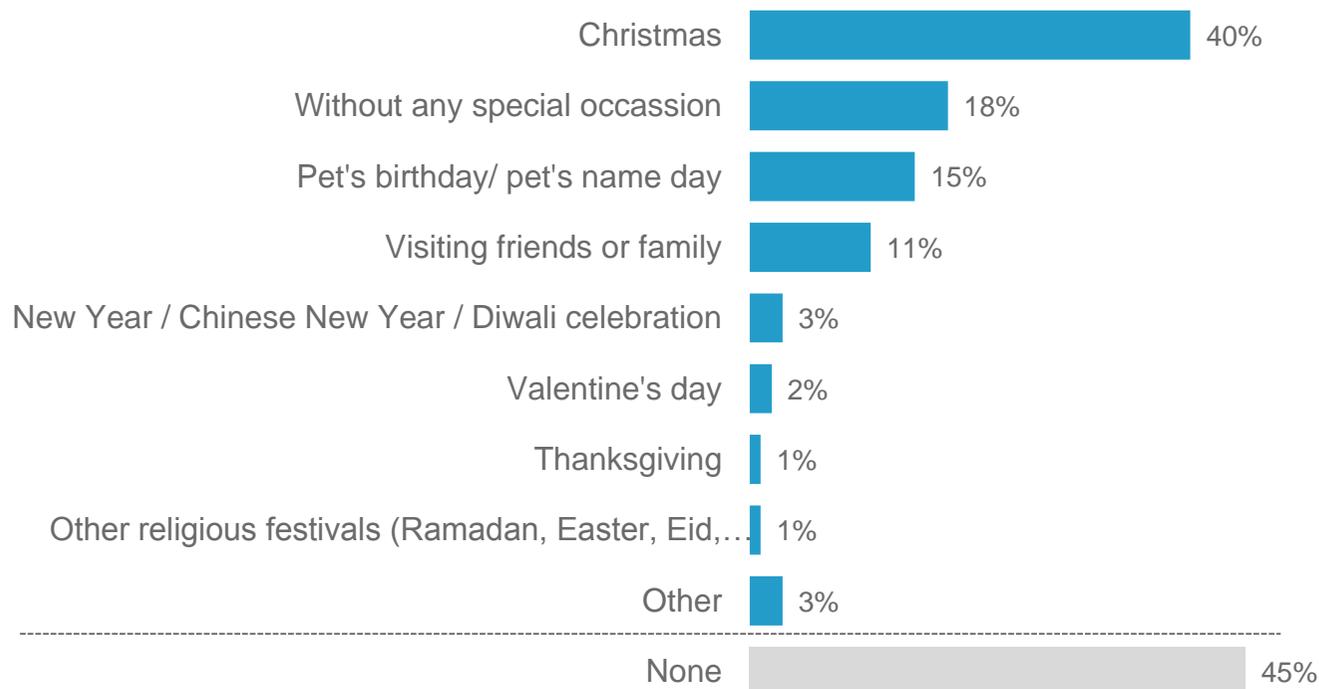


Base: All respondents n=2000

M11Q1: On a scale of 1 to 5, where 1 means not at all interested and 5 means very interested, how interested would you be in buying your own or somebody else's cat / dog a gift for the following celebrations?

# Christmas is the most popular occasion for pet gifting. In Ireland, almost 2 in 5 people have bought their own or somebody else's pet a gift at Christmas

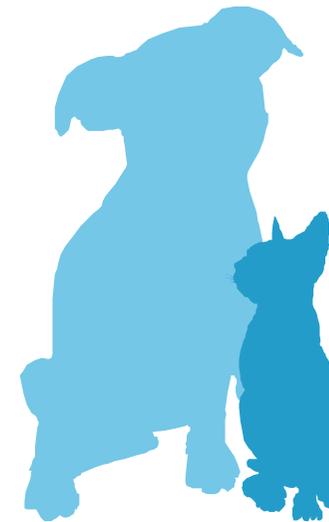
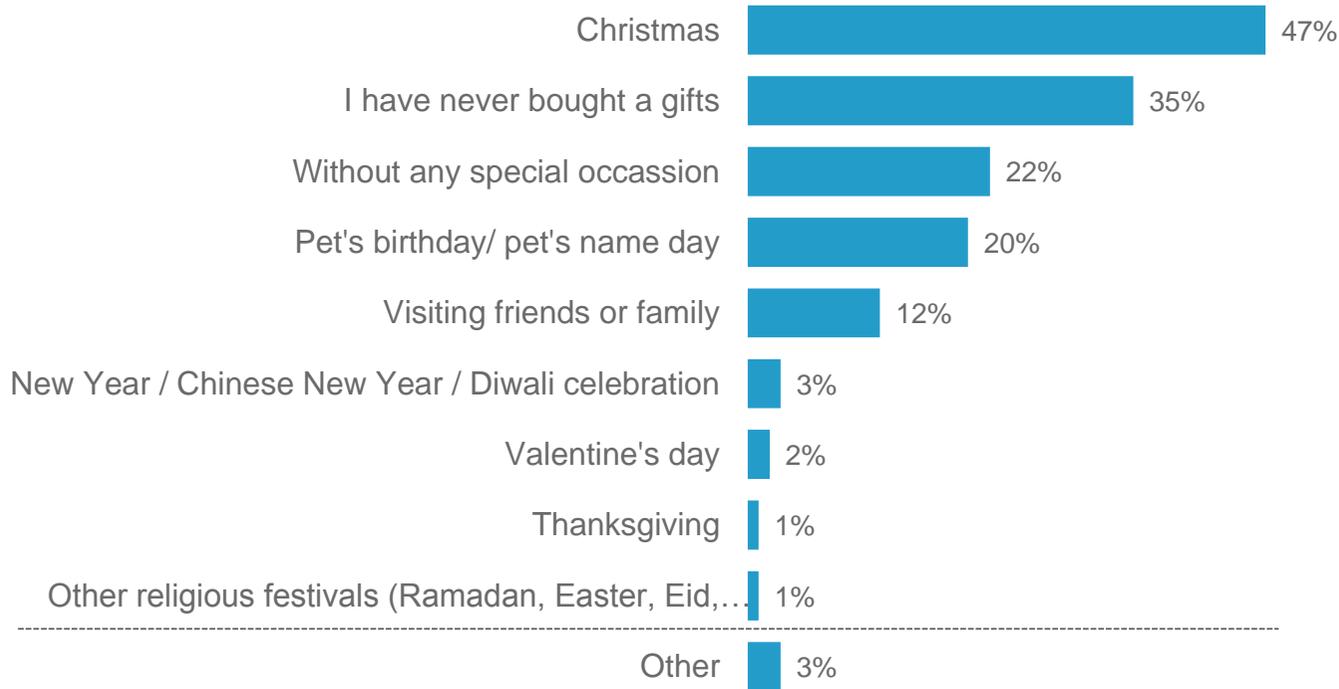
## Occasion for pet gift purchases in the past – general population (pet owners and non-pet owners)



Base: All respondents n=2000

M11Q2: In the past, have you ever bought your or somebody's else's cat or dog a gift for the following celebrations?

## Occasion for pet gift purchases in the past – dog and cat owners

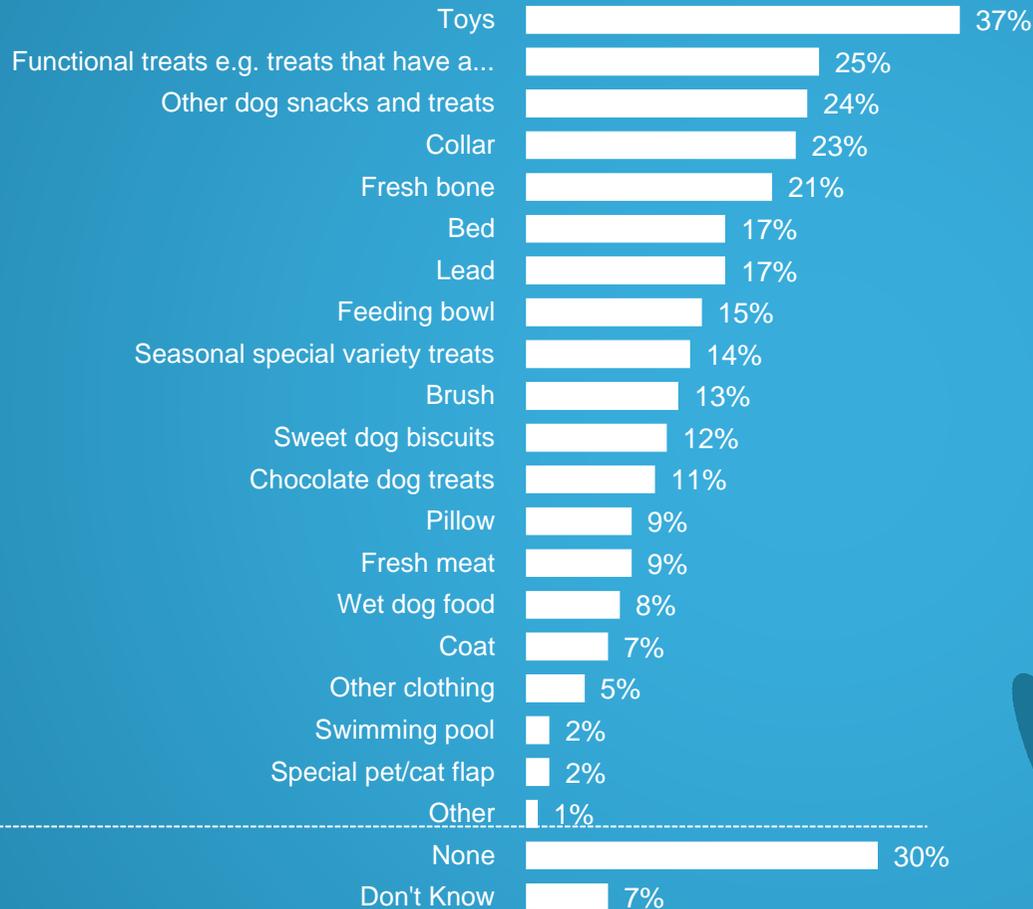


Base: Dog and Cat owners n=1238

M11Q2: In the past, have you ever bought your or somebody's else's cat or dog a gift for the following celebrations?



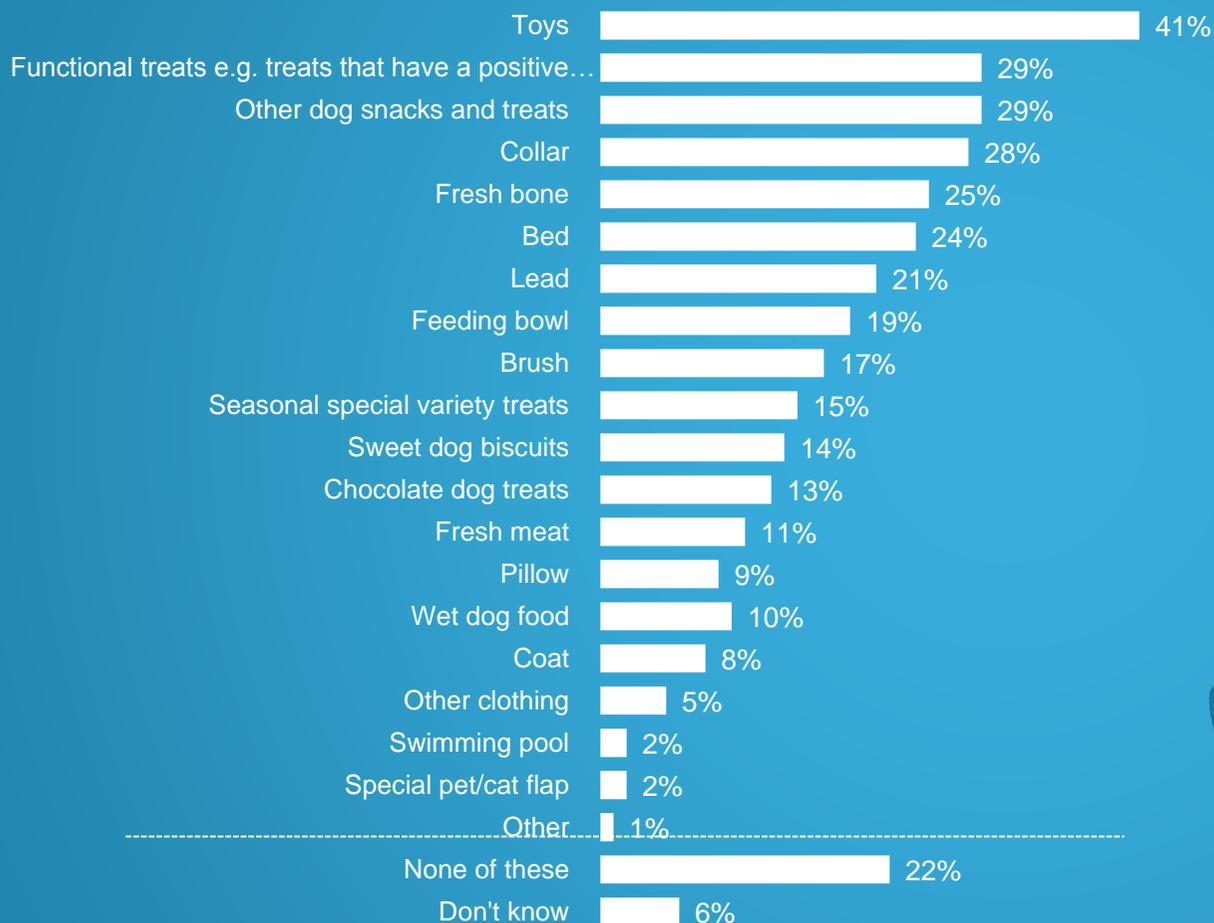
## Interest in buying specific gifts for dogs - general population (pet owners and non-pet owners)



Base: All respondents n=2000

M11Q3D: Which, if any, of the following gifts are you interested in buying for your or somebody else's dog in the future?

## Interest in buying specific gifts for dogs and cats – dog and cat owners

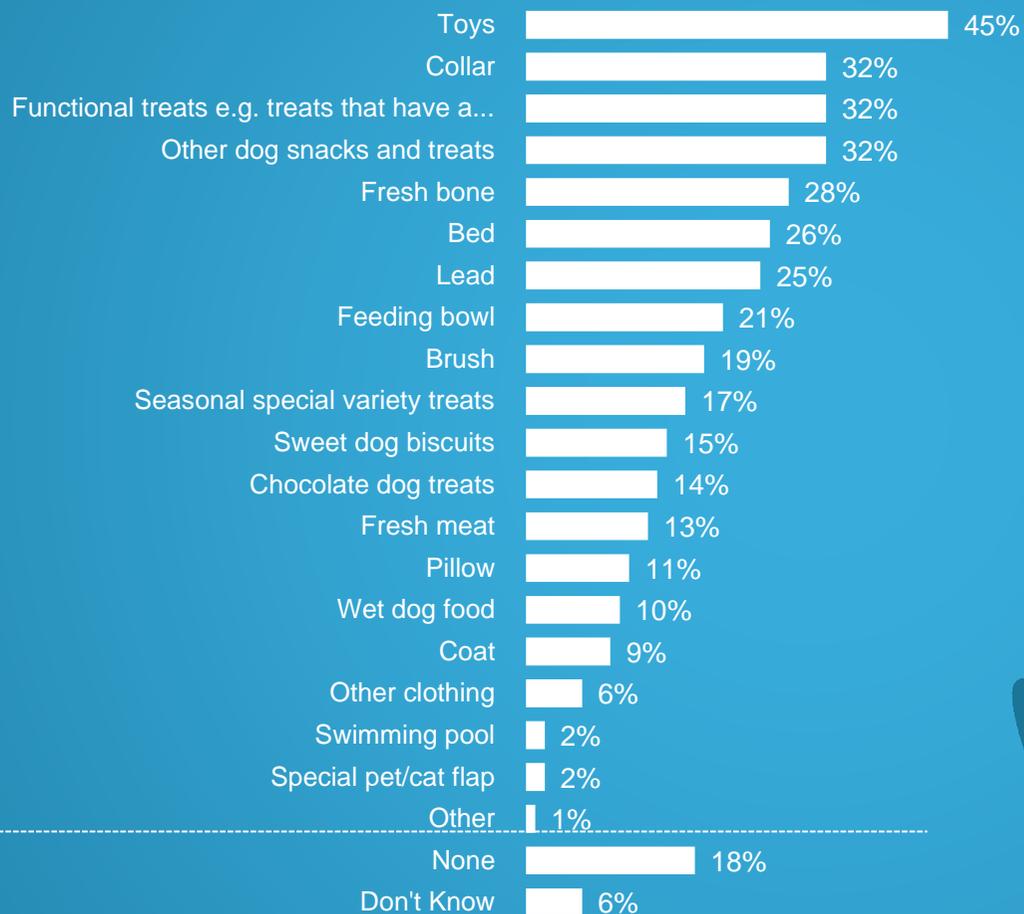


Base: All respondents n=1238

M11Q3D: Which, if any, of the following gifts are you interested in buying for your or somebody else's dog in the future?



## Interest in buying specific gifts for dogs – dog owners



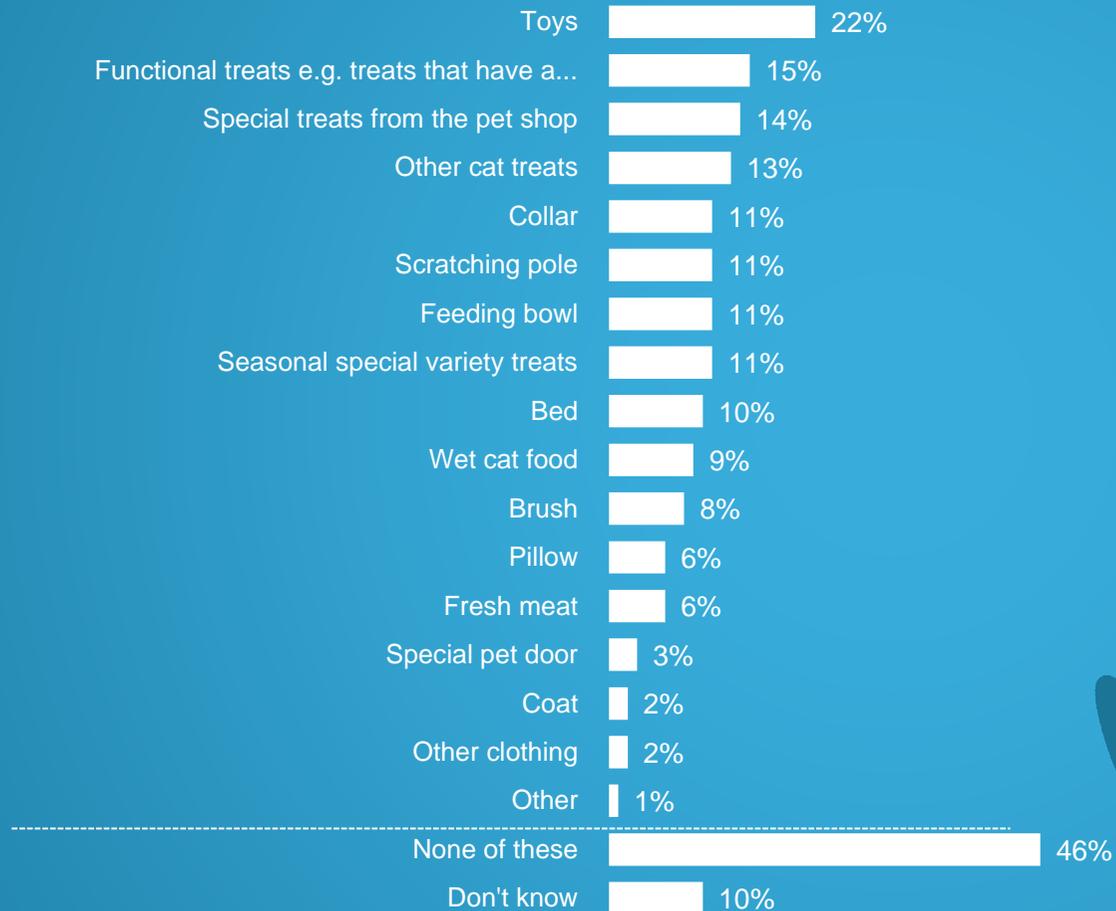
Base: All dog owners n=978

M11Q3D: Which, if any, of the following gifts are you interested in buying for your or somebody else's dog in the future?

# Similarly, people are most likely to buy toys followed by treats as gifts for their own or somebody else's cat



## Interest in buying specific gifts for cats – general population (pet owners and non-pet owners)

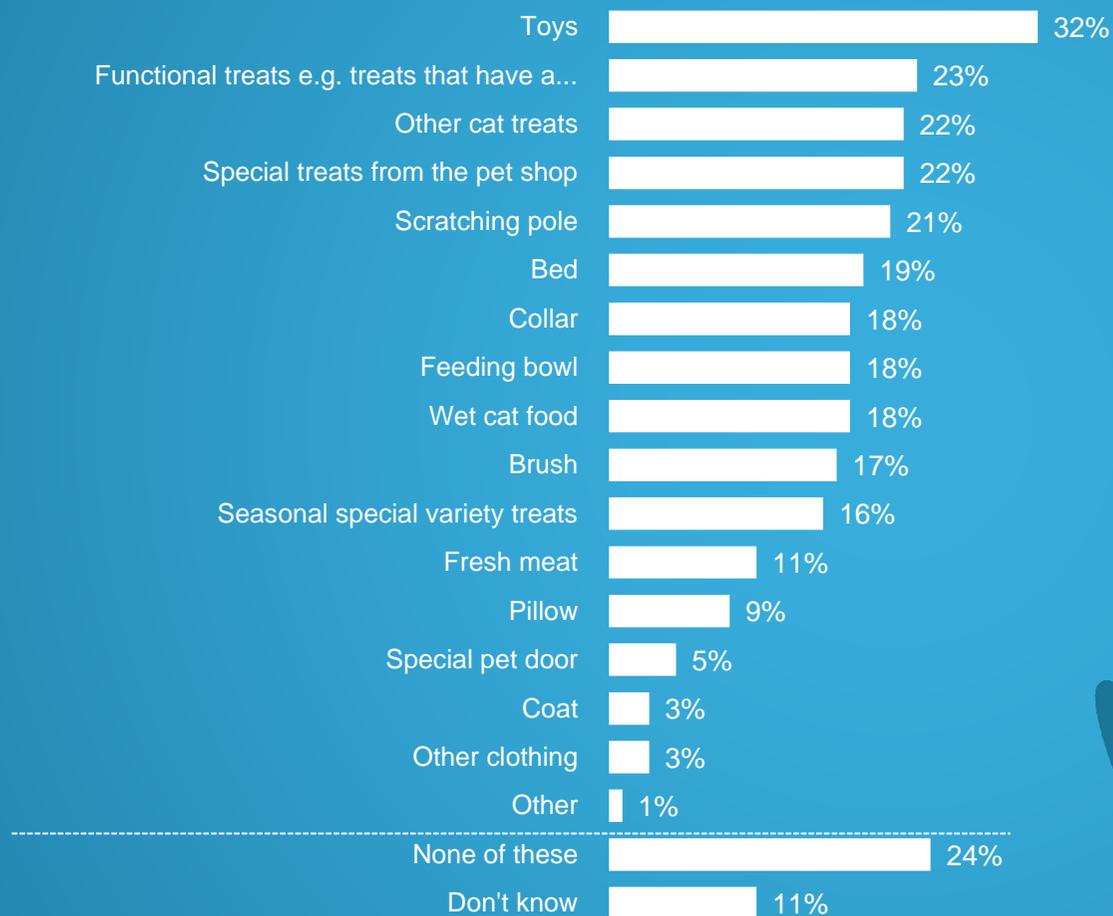


Base: All respondents n=2000

M11Q3C: Which, if any, of the following gifts are you interested in buying for your or somebody else's cat in the future?

# Cat owners too are interested in toys and treats for their cats, but would also be interested in functional items such as scratching poles, collars and beds

## Interest in buying specific gifts for cats – cat owners



Base: All cat owners n=587

M11Q3C: Which, if any, of the following gifts are you interested in buying for your or somebody else's cat in the future?

# MARS

# Pet Health

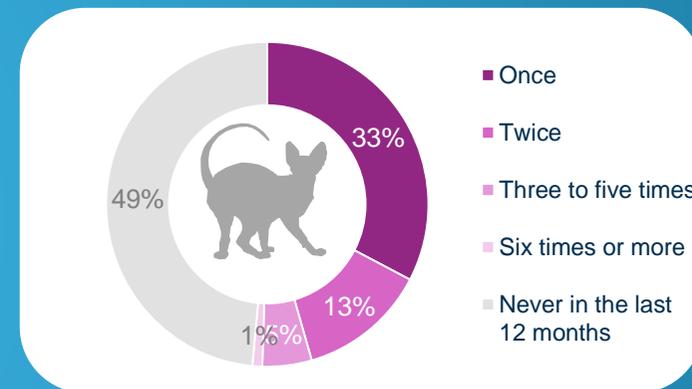
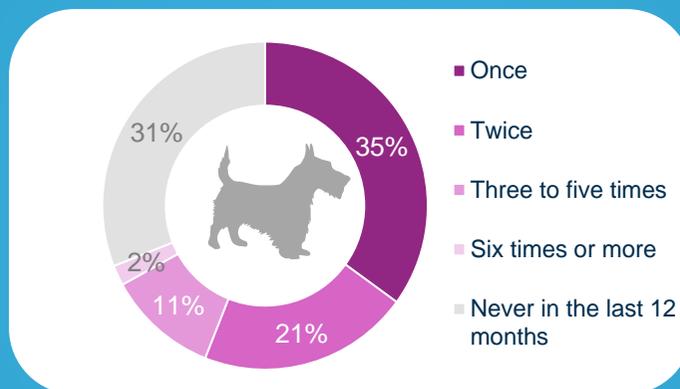
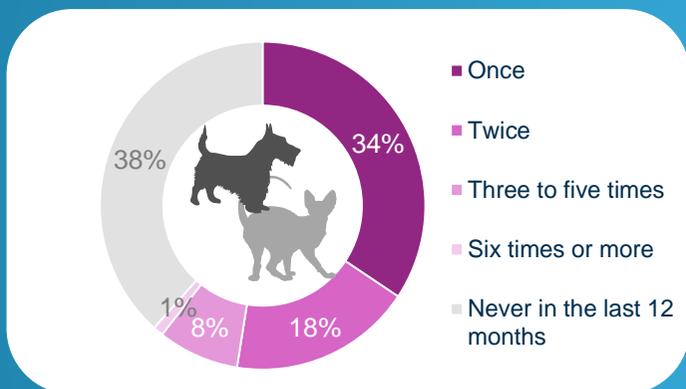


Ireland



# Almost two thirds of pets have visited the vets in the past 12 months. Dogs are more likely to have visited the vet in the past 12 months than cats

## Pet visits to the vet in the past 12 months

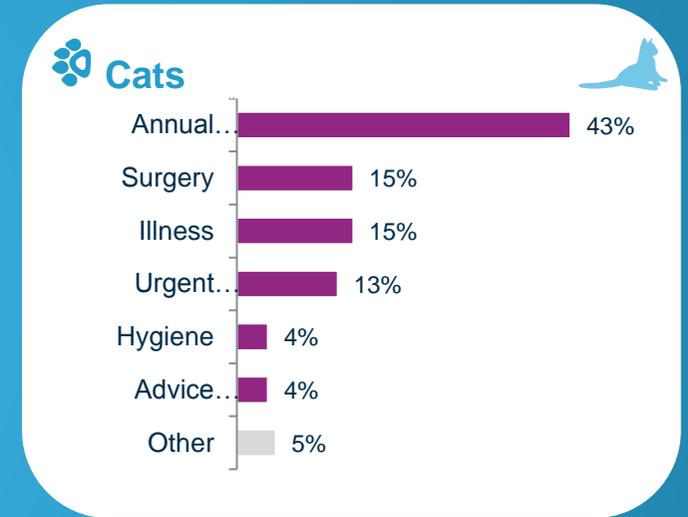
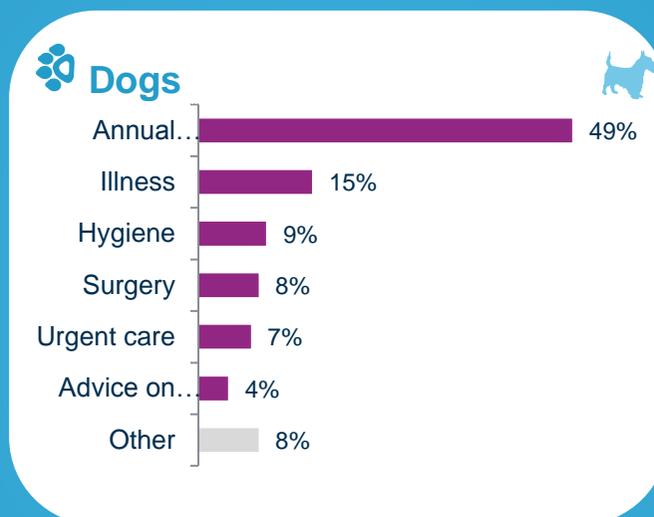
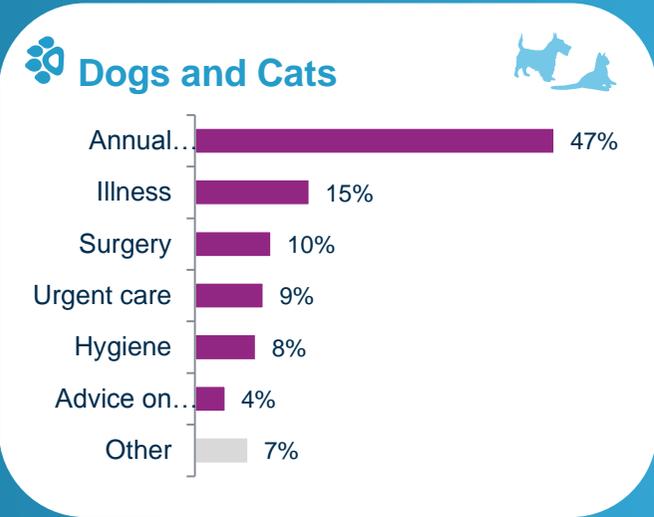


Base: All cats and dogs: 2052 All dogs n=1235; All cats n=817

M4Q1: In the past 12 months, how many times have you or a member of your household taken your pet to the vet?

For those that have visited a vet in the past 12 months, the most common reason to visit for both cats and dogs is for an annual medical visit/vaccination. Vets are unlikely to be visited for advice

## Reason for visit to the vet

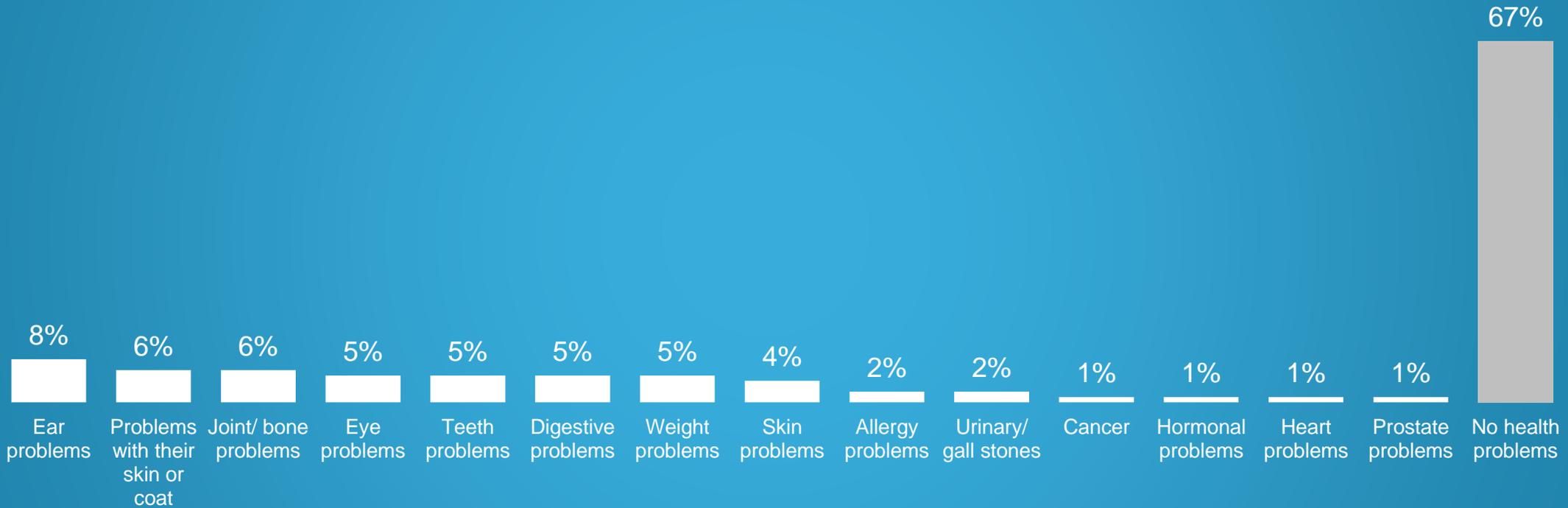


Base: All dogs and cats: 1338 All dogs who have visited the vet in the past 12 months n=891 and all cats who have visited the vet in the past 12 months n=447

M4Q2: For which of the following reason(s) did you or a member of your household take your pet to the vet?

Over two thirds of cat and dog owners have not faced any health problems/conditions with their pets. Of the minority that have, the most frequent issue is ear problems

### Health conditions/problems- dogs and cats

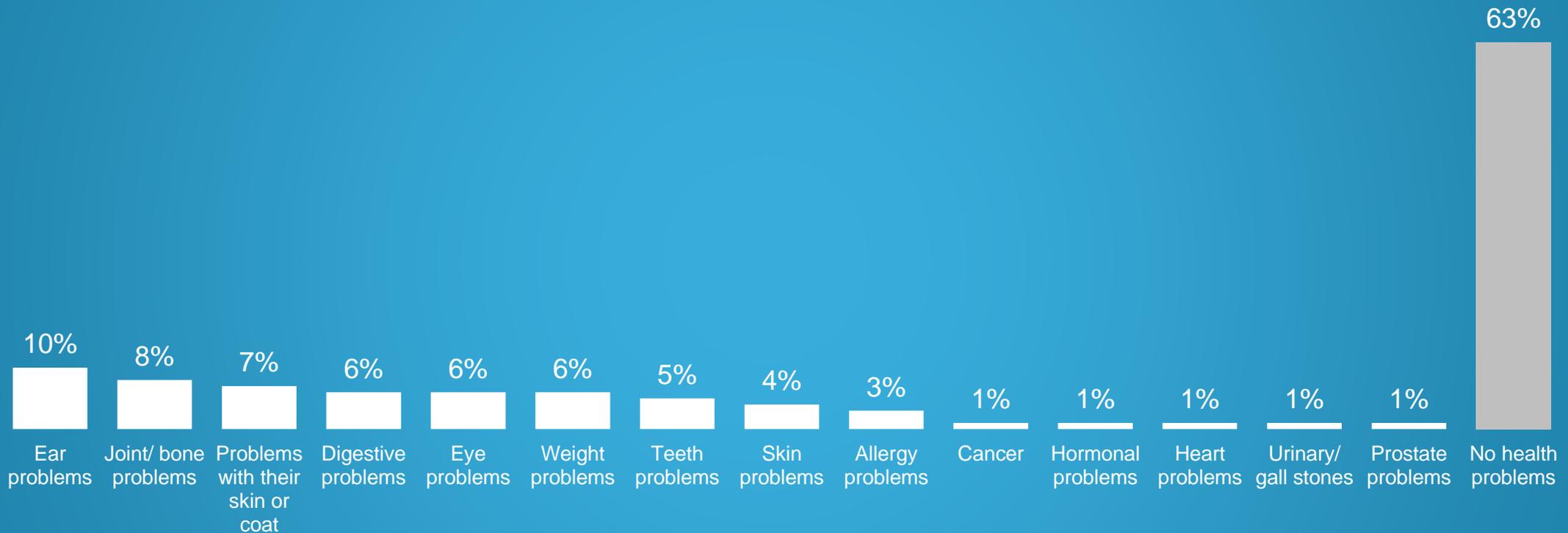


Base: All dog and cat owners n=1565

M4Q3: Do any of your pet(s) currently have, or did any of them recently have, any of the following health conditions/problems?

Similarly, almost two thirds of dog owners have not faced any health issues with their pets. However among those who do, their dogs suffer from a variety of health concerns including ear problems, joint/bone problems and problems with their skin or coat

Health conditions/problems- dog

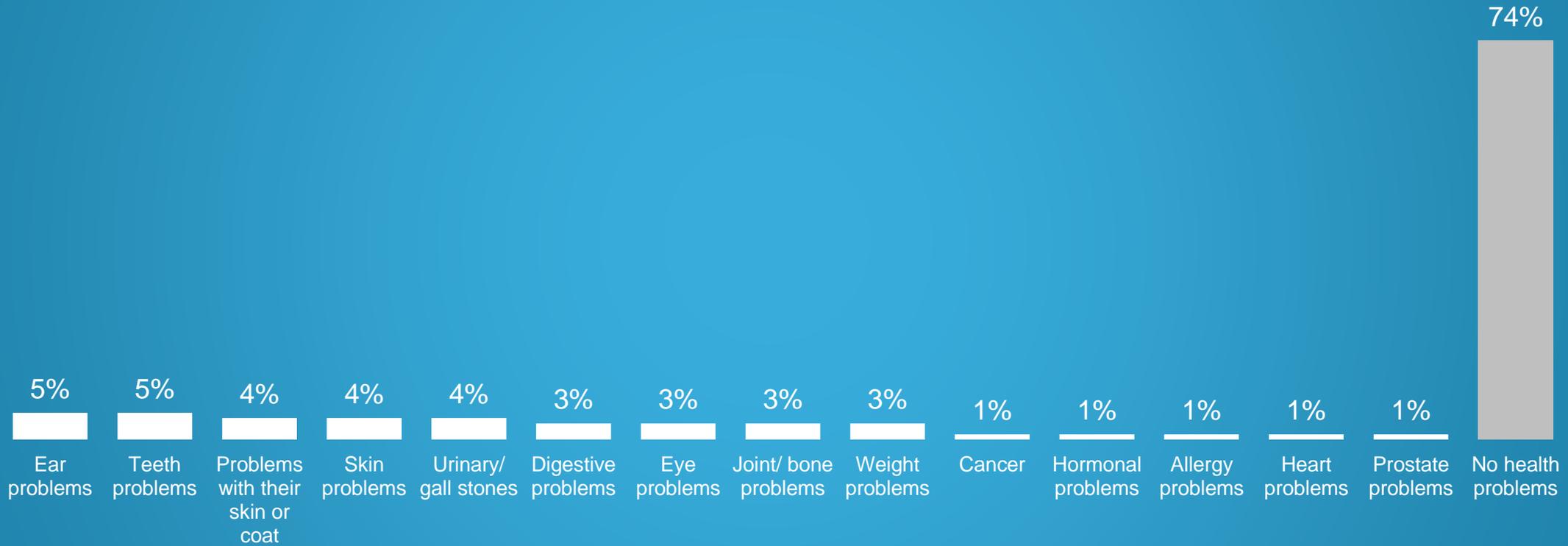


Base: All dog owners n=978

M4Q3: Do any of your pet(s) currently have, or did any of them recently have, any of the following health conditions/problems?

Almost three quarters of cat owners have not faced any health issues with their pets. However among those who do, their cats suffer from a variety of health concerns including teeth and ear problems and issues with their skin or coat

## Health conditions/problems- cat



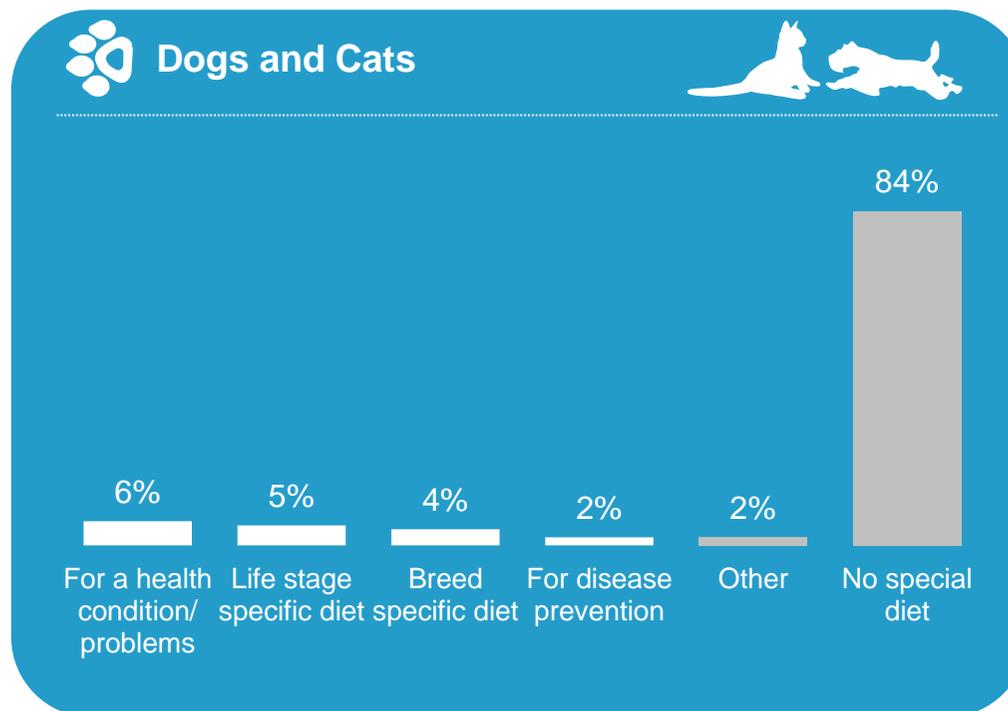
Base: All cat owners n=587

M4Q3: Do any of your pet(s) currently have, or did any of them recently have, any of the following health conditions/problems?

The vast majority of cat and dog owners do not feed their pet a special diet. The small proportion who do, have one for a health condition or because of their current life stage



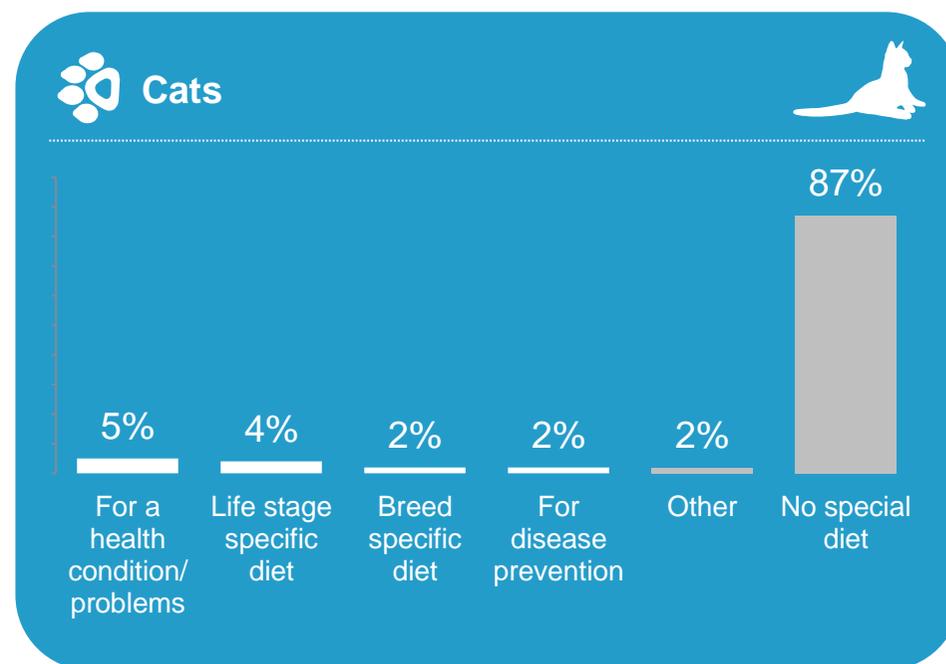
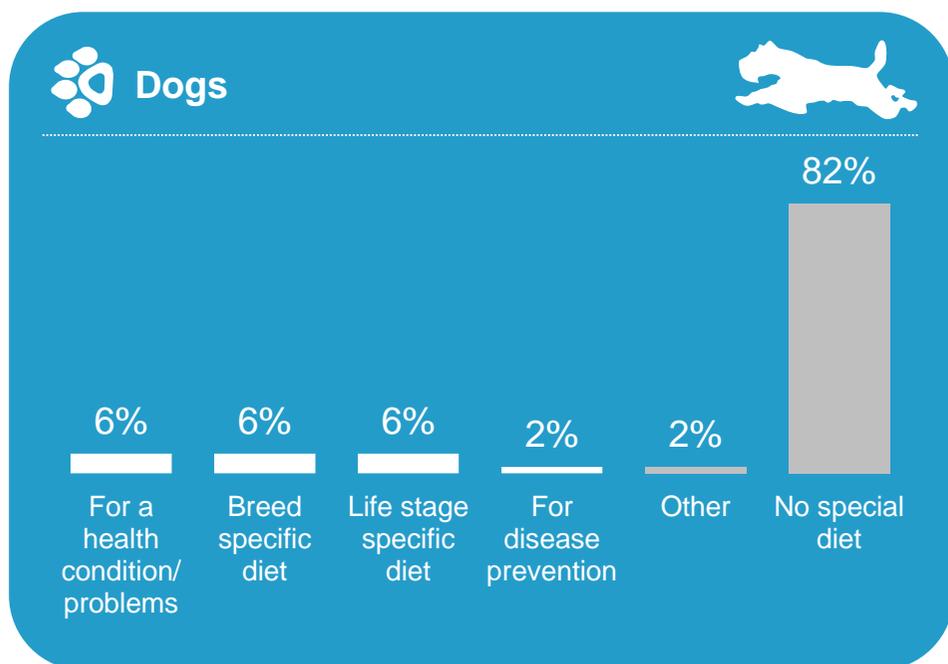
## Reasons for pets' special diet



Base: All dog and cat owners: 1565

M4Q4: Do any of your pet(s) currently have a special diet?

## Reasons for pets' special diet



Base: All dog owners n=978: All cat owners n=587

M4Q4: Do any of your pet(s) currently have a special diet?

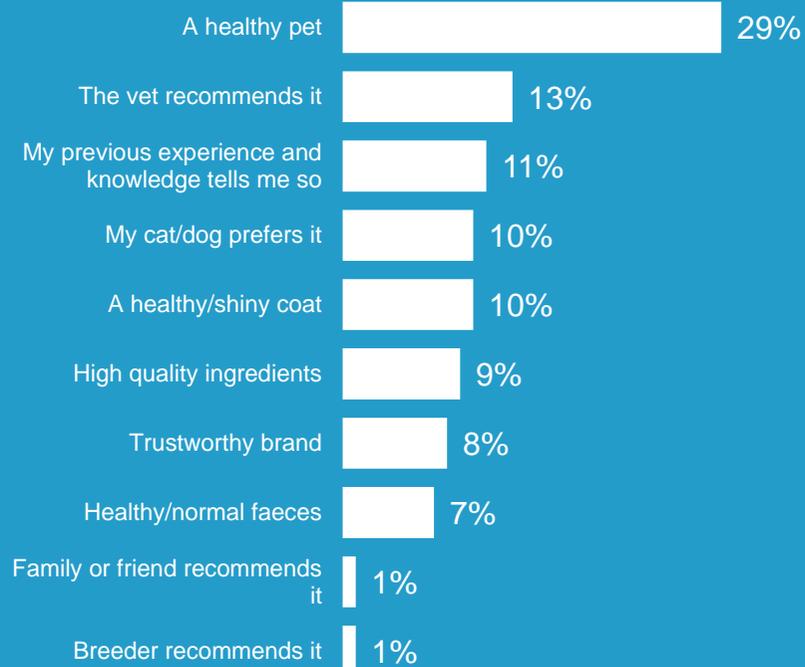
For owners of both cats and dogs, a healthy pet is the main indicator that their food is good for their pet.



Best indication that the food served is good for your pet



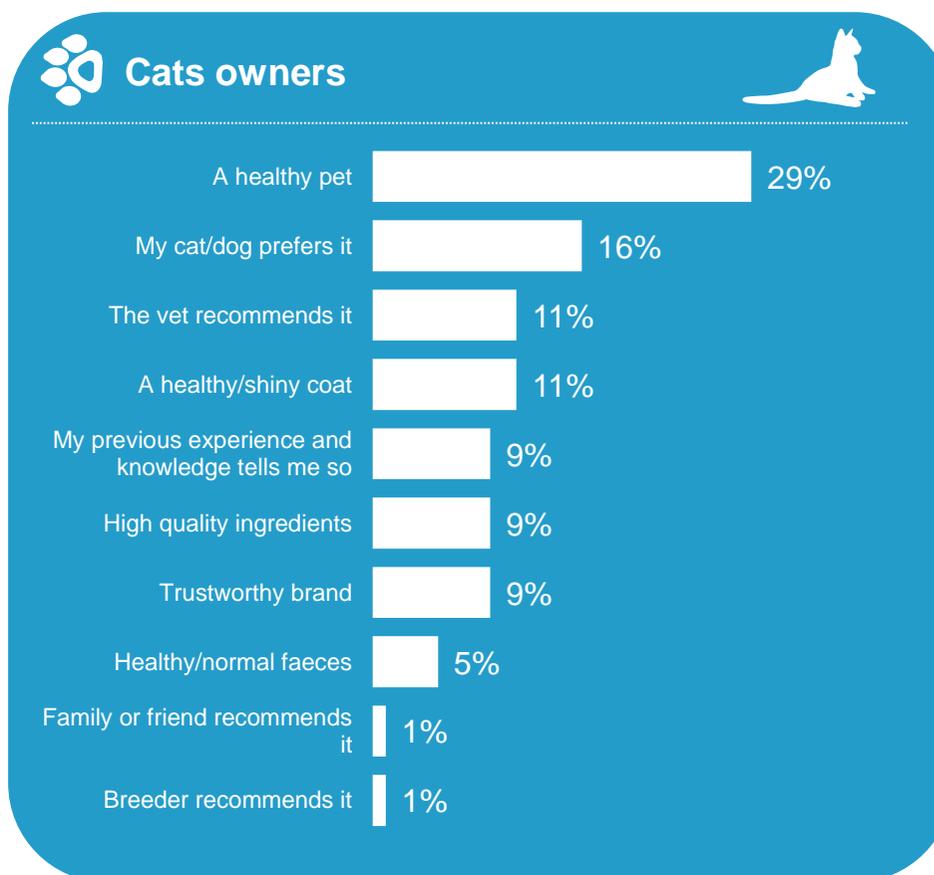
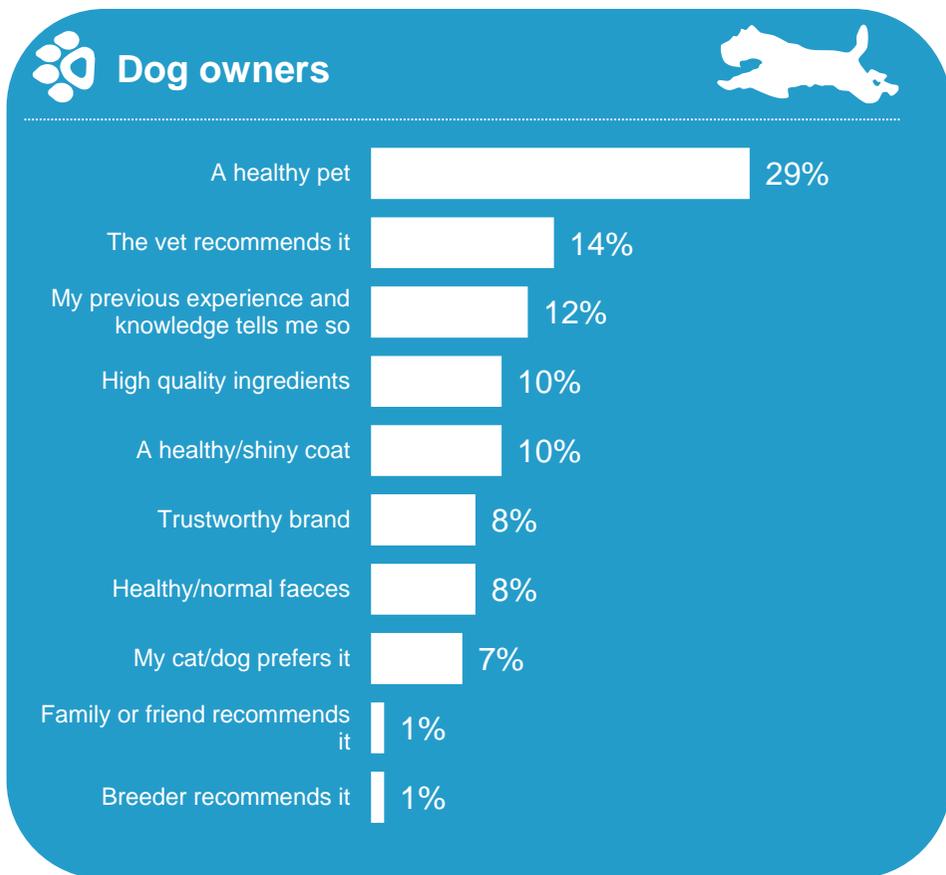
Dog and cat owners



Base: All dog owners and cat owners: 1238

M4Q5: Which of the following is the best indication that the food you serve is good for your pet's health?

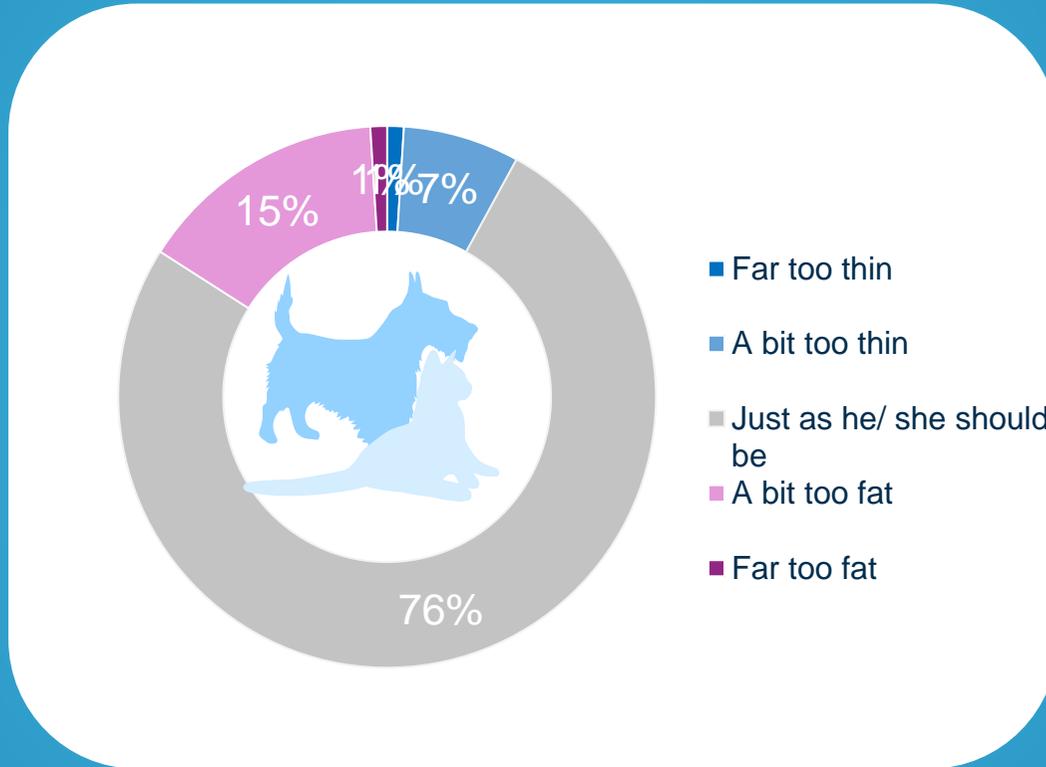
## Best indication that the food served is good for your pet



Base: All dog owners n=978 | All cat owners n=587

M4Q5: Which of the following is the best indication that the food you serve is good for your pet's health?

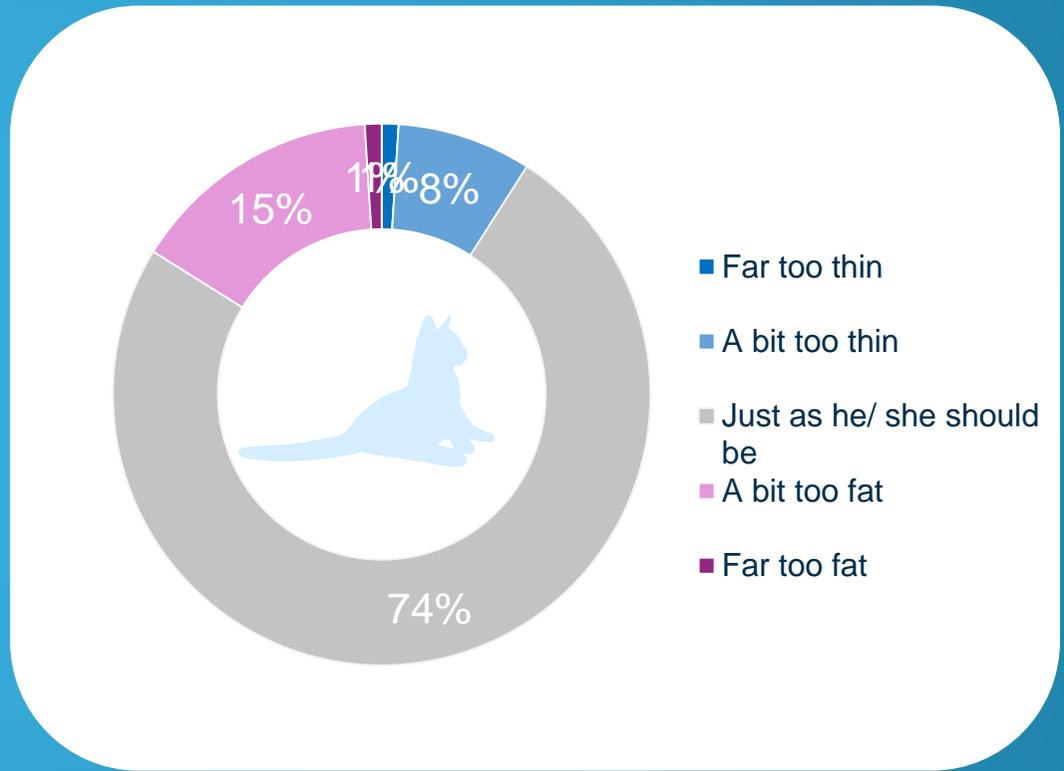
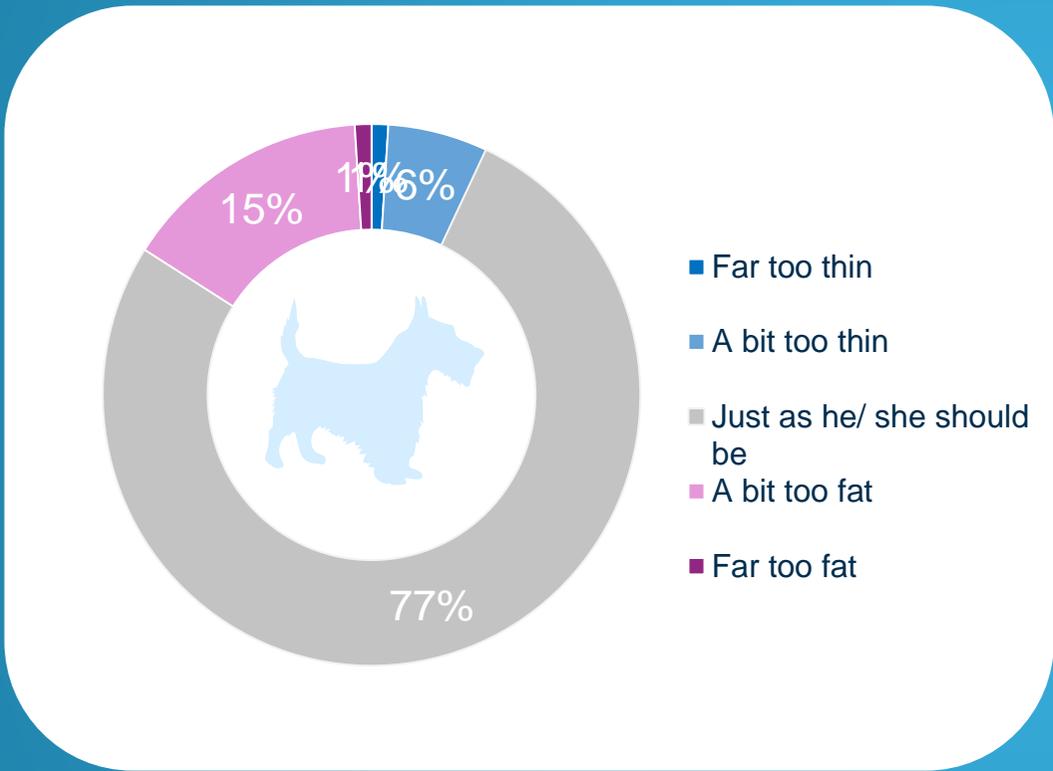
## Perceptions of pets weight



Base: All dogs and cats n= 2052

M4Q6: Do you think your pet is...

## Perceptions of pets weight



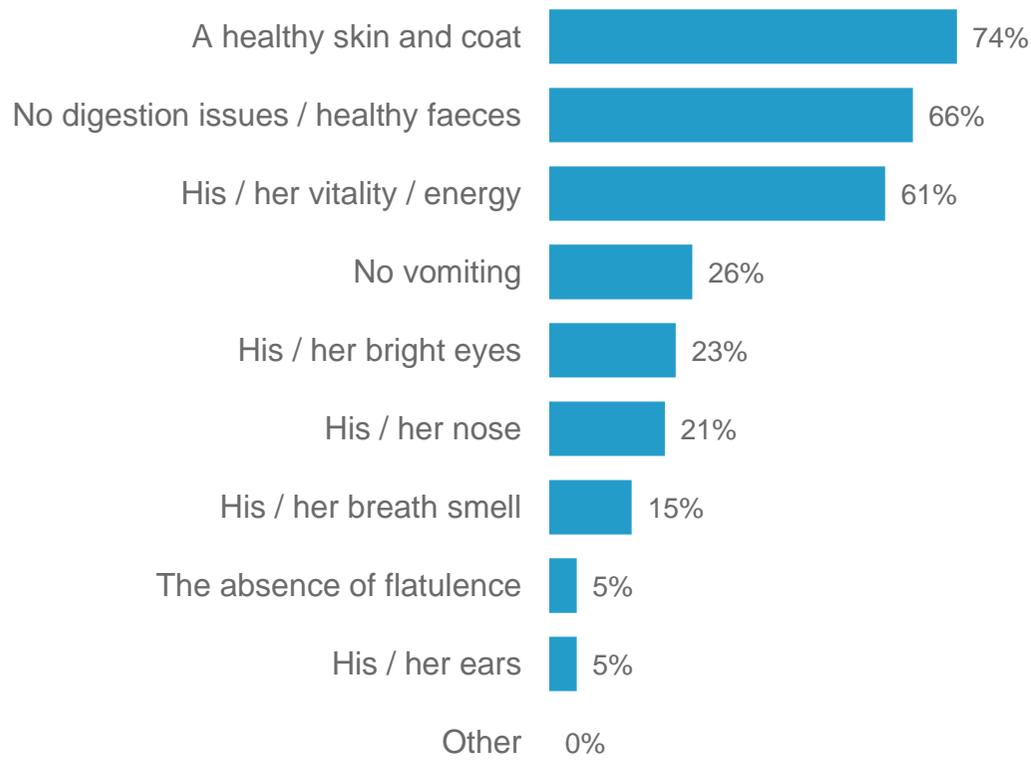
Base: All dogs n=1235 | All cats n=817

M4Q6: Do you think your pet is...

# Dog and cat owners say that a key indicator of good health is a healthy skin and coat, no digestion issues/healthy faeces and vitality



## Indicators of pets' good health – dog and cat (ranked 1<sup>st</sup>, 2<sup>nd</sup> or 3<sup>rd</sup>)



### Top 3 (ranked 1<sup>st</sup>)

	%
A healthy skin and coat	74
No digestion issues/healthy faeces	66
His/her visibility/energy	61

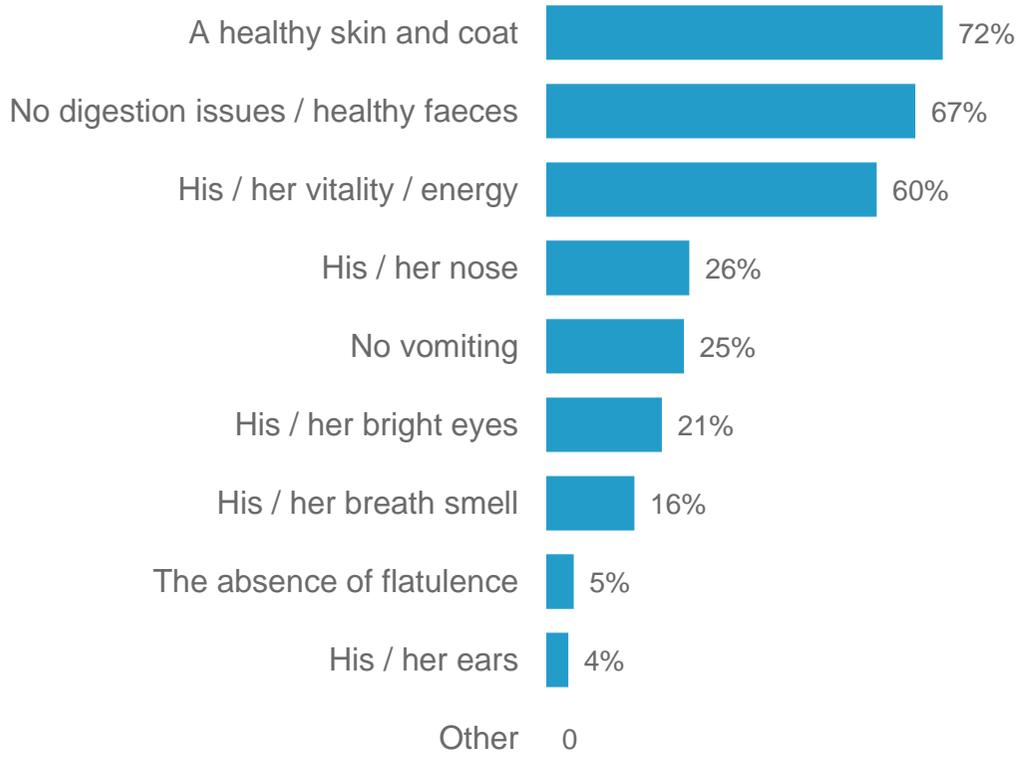
Base: All dog and cat owners n=1565

M4Q7: How do you tell if your dog or cat is in good health?

# Similarly, dog owners say that no digestion issues, vitality and a healthy coat are good indicators of good health



## Indicators of pets' good health – dog (ranked 1<sup>st</sup>, 2<sup>nd</sup> or 3<sup>rd</sup>)



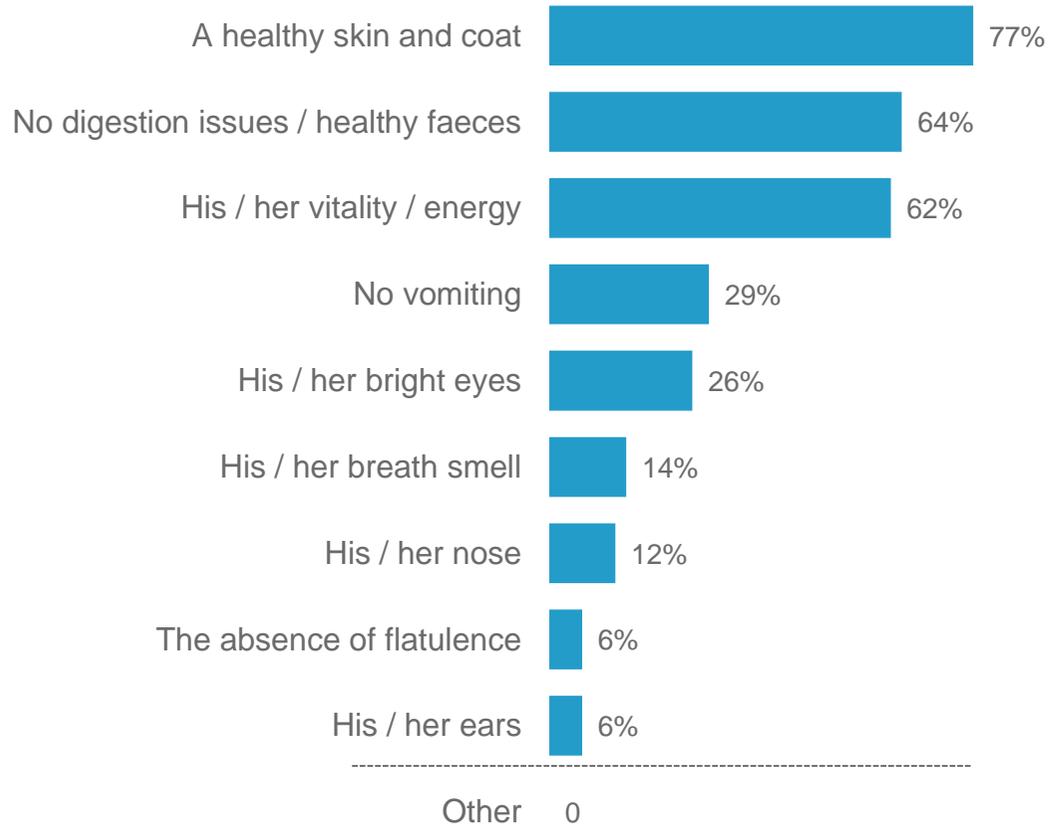
### Top 3 (ranked 1<sup>st</sup>)

	%
No digestion issues/healthy faeces	72
His / Her vitality / energy	67
A healthy skin and coat	60

Base: All dog owners n=978

M4Q7: How do you tell if your dog or cat is in good health?

## Indicators of pets' good health – cat (ranked 1<sup>st</sup>, 2<sup>nd</sup> or 3<sup>rd</sup>)



### Top 3 (ranked 1<sup>st</sup>)

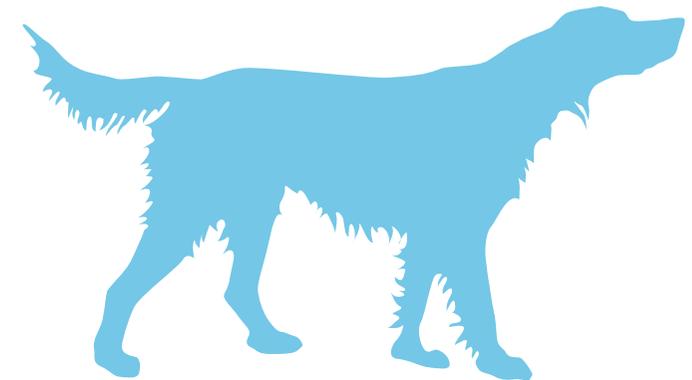
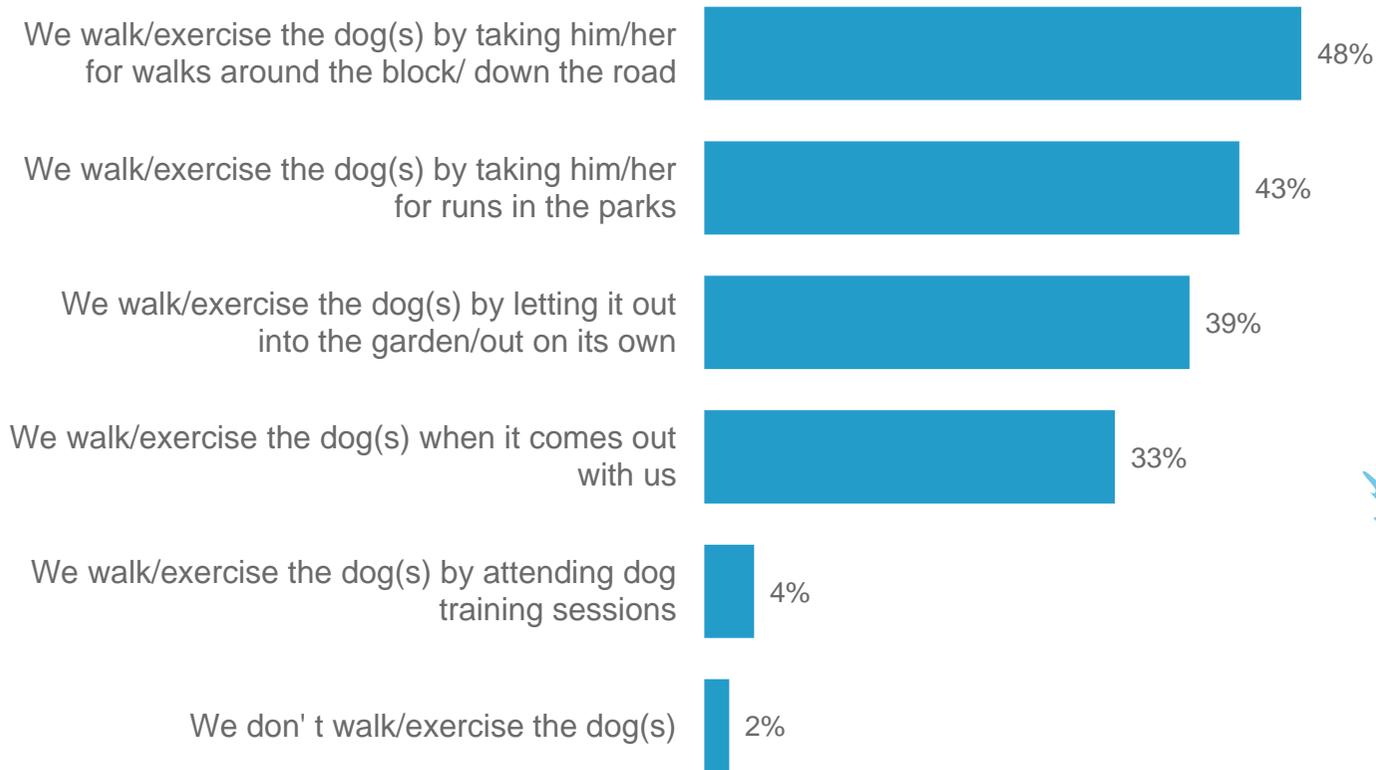
	%
A healthy skin and coat	77
No digestion issues/healthy faeces	64
His / her vitality / energy	62

Base: All cat owners n=587

M4Q7: How do you tell if your dog or cat is in good health?

# Almost all dog owners walk and exercise their dogs by walking them around the block, in the park or letting them out into the garden

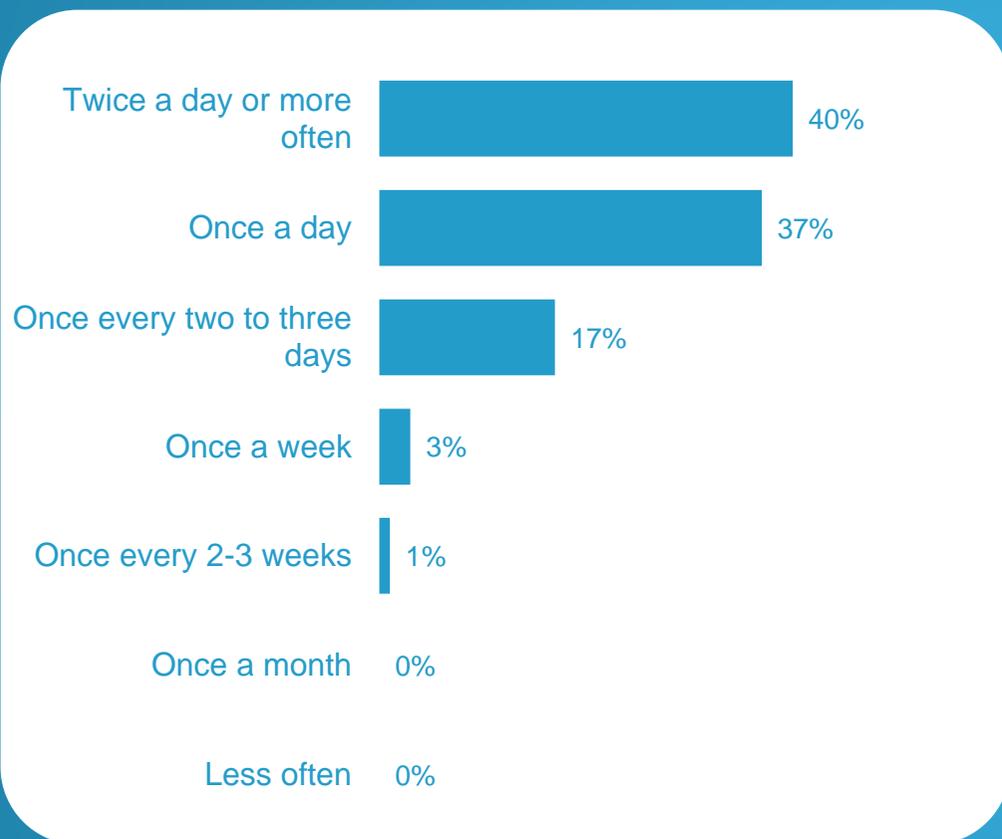
## Decisions on how to walk/exercise dog(s)



Base: All dog owners n=978

M4Q8: Among these statements, please indicate which of the following best describes how you, or members of your household, decide when to walk/exercise your dog(s)

## Frequency of walk/exercise

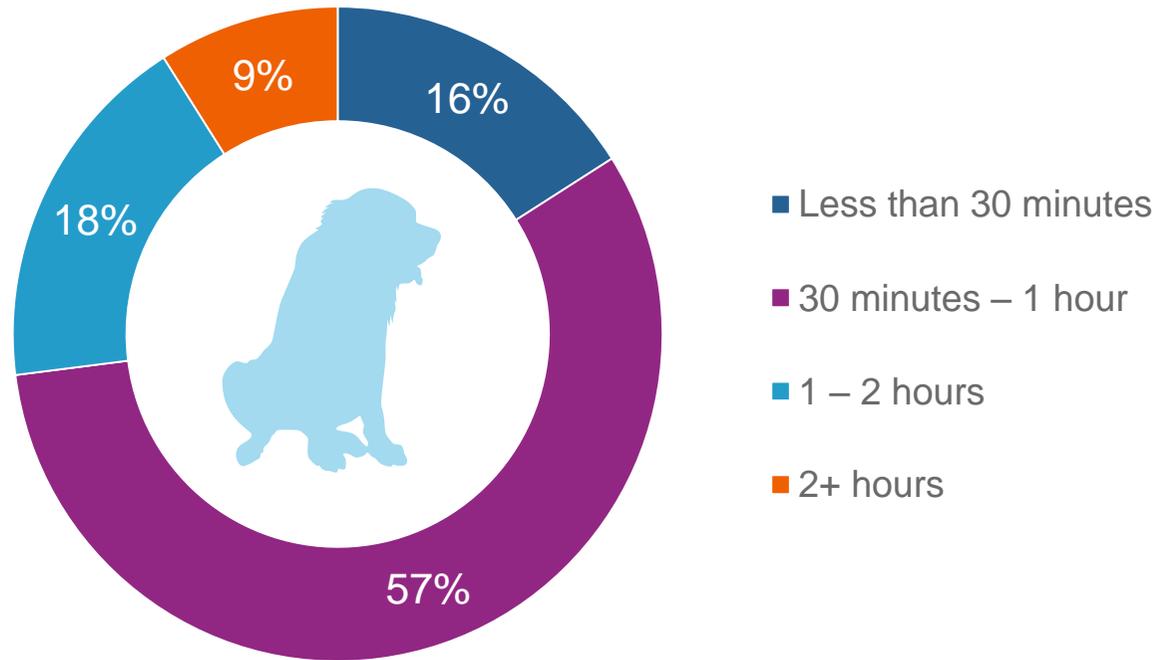


Base: All dog owners n=978

M4Q9 Among these statements, please indicate which of the following best describes how you, or members of your household, decide when to walk/exercise your dog(s)

Almost three in five (57%) dog owners walk their dog for between 30 minutes to an hour each day. Less than 10% walk their dog for more than 2 hours

 Time dog spends out for walks/exercising per day



Base: All dog owners n=978

M4Q10: What is the average amount of time your dog spends out for walks /exercise per day?

MARS

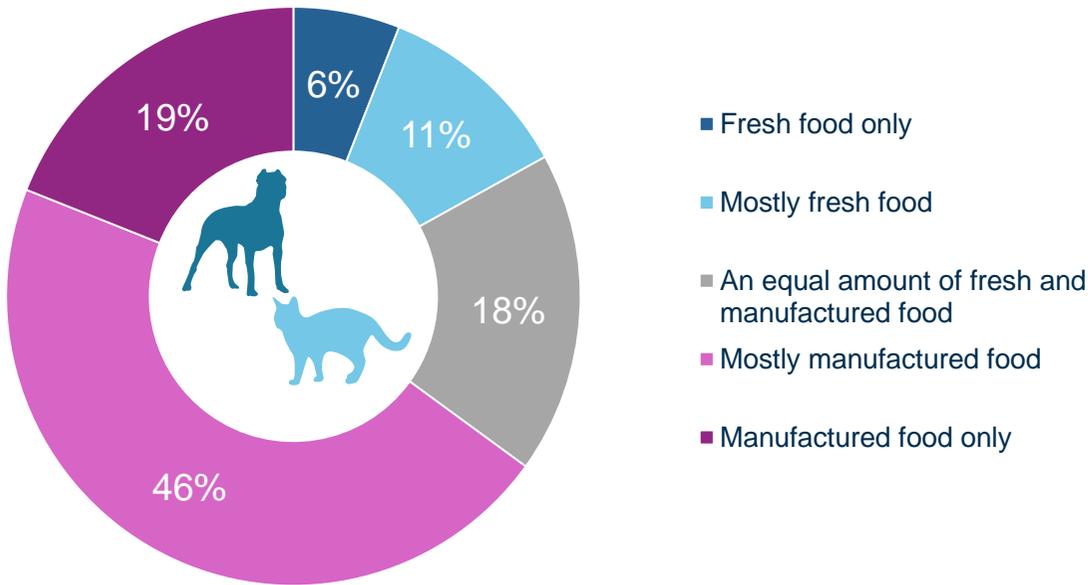
# Pet Feeding Pattern



Ireland



## Fresh vs. Manufactured Food



### Nets

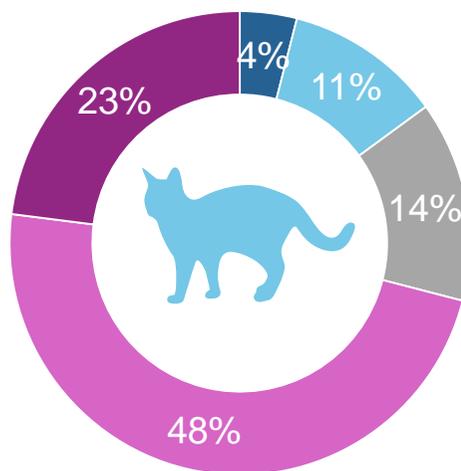
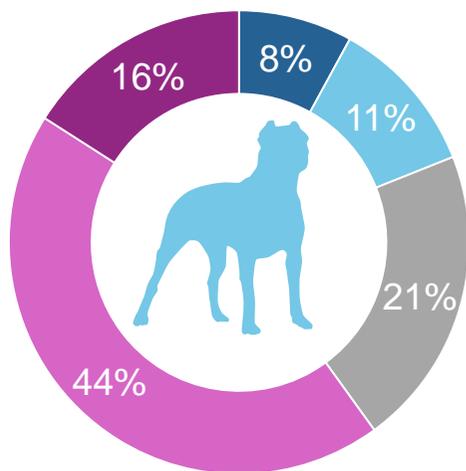
	% Dogs and Cats
All or mostly manufactured food	65
Equal amount of both	18
All or mostly fresh food	17

Base: All dogs and cats n= 2052

M12Q1: Which of these statements best describe the food that you, or a member of your household, feed your pet

Although both cats and dogs are predominantly fed manufactured food, overall cats are more likely to be fed all or mostly manufactured food than dogs

## Fresh vs. Manufactured Food



- Fresh food only
- Mostly fresh food
- An equal amount of fresh and manufactured food
- Mostly manufactured food
- Manufactured food only

### Nets

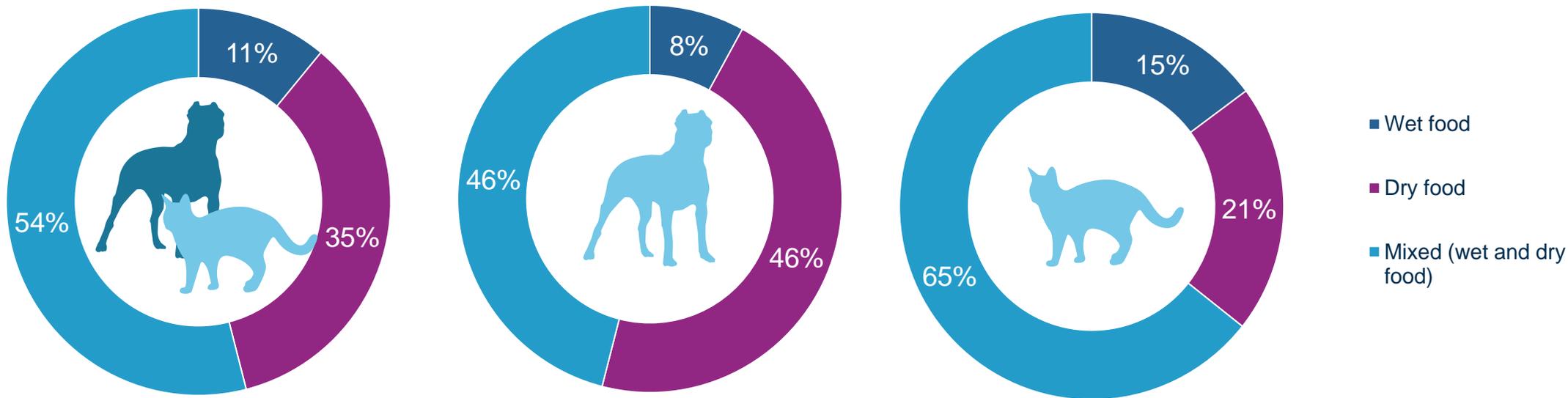
	% Dogs	% Cats
All or mostly manufactured food	60	71
Equal amount of both	21	14
All or mostly fresh food	19	15

Base: All dogs n=1235 and All cats n=817

M12Q1: Which of these statements best describe the food that you, or a member of your household, feed your pet

Dogs who are fed manufactured food tend to be fed dry food or a mix of wet and dry food. Whereas, cats are more likely to be fed a mix of wet and dry food

Type of Manufactured Food

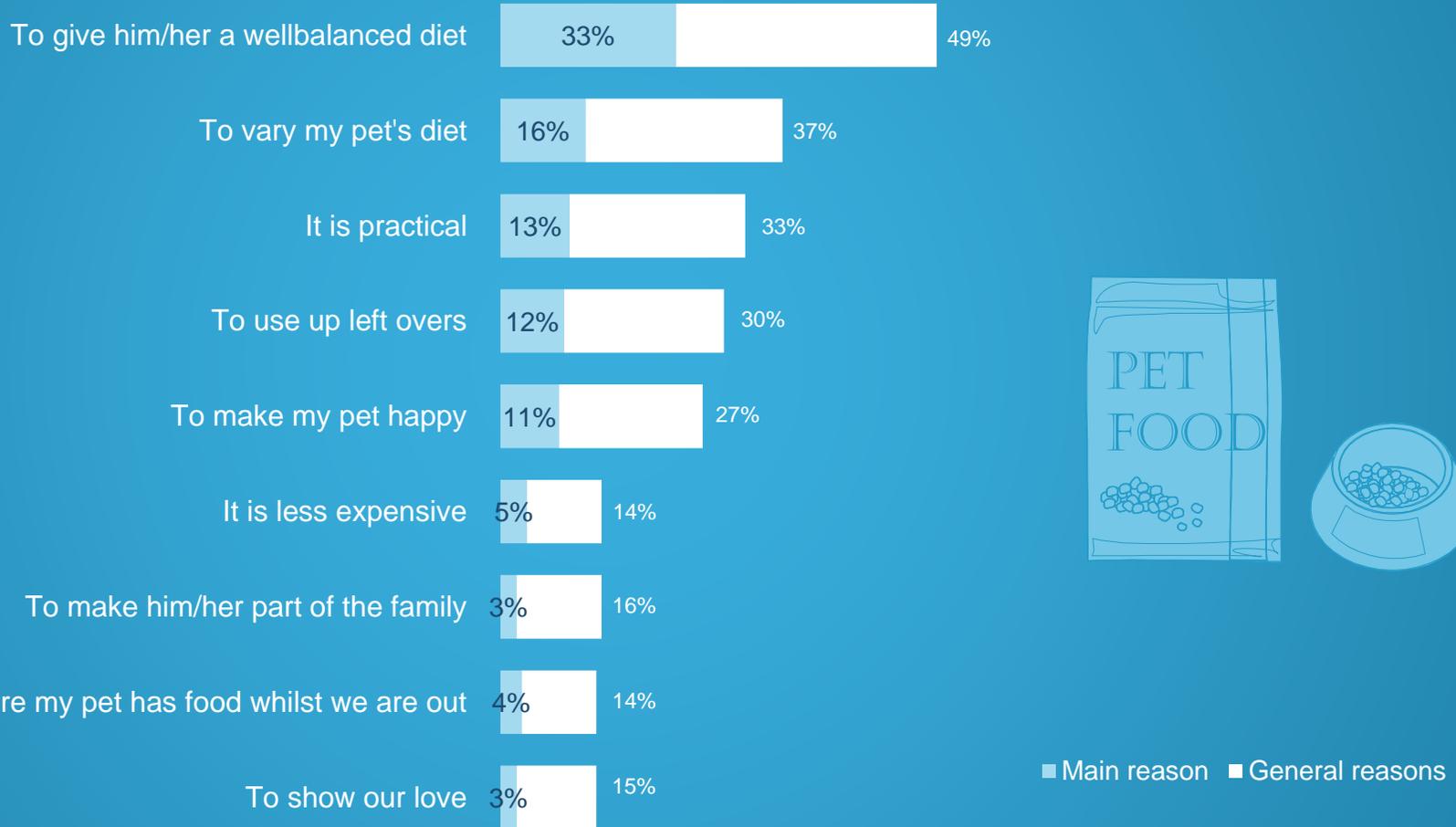


Base: All dogs and cats who are fed manufactured food n= 1909 All dogs who are fed manufactured food n=1134; All cats that are fed manufactured food n=775

M12Q2: Which of these statements best describe the food that you, or a member of your household, feed your pet

# Dog and cat owners mix feed to ensure their animals receive a well balanced and varied diet. It is also practical and allows them to use up any leftovers

## Reasons for feeding pet both fresh and manufactured food – dogs and cats



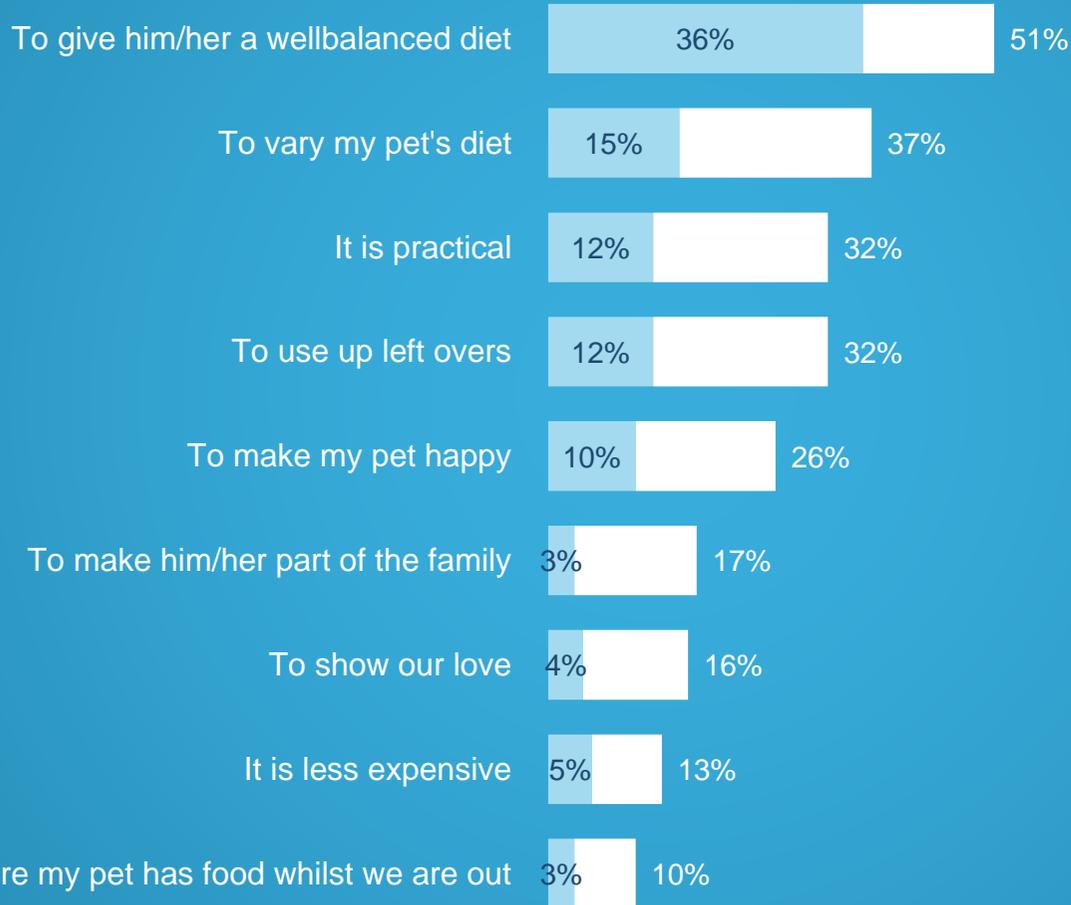
■ Main reason ■ General reasons

Base: All dogs and cats n=1554  
 M12Q3: Why is your pet fed both fresh food and manufactured food?  
 M12Q5: And what is the main reason your pet is fed both fresh food and manufactured food?

# The main reason dog owners feed both fresh and manufactured is to give their dog a well balanced diet



## Reasons for feeding pet both fresh and manufactured food - dogs



■ Main reason ■ General reasons

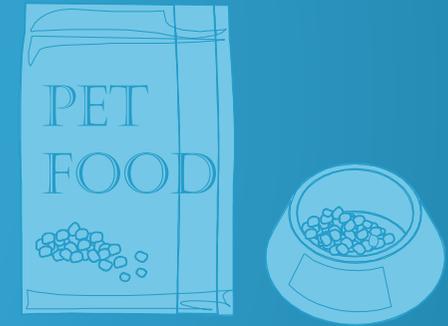
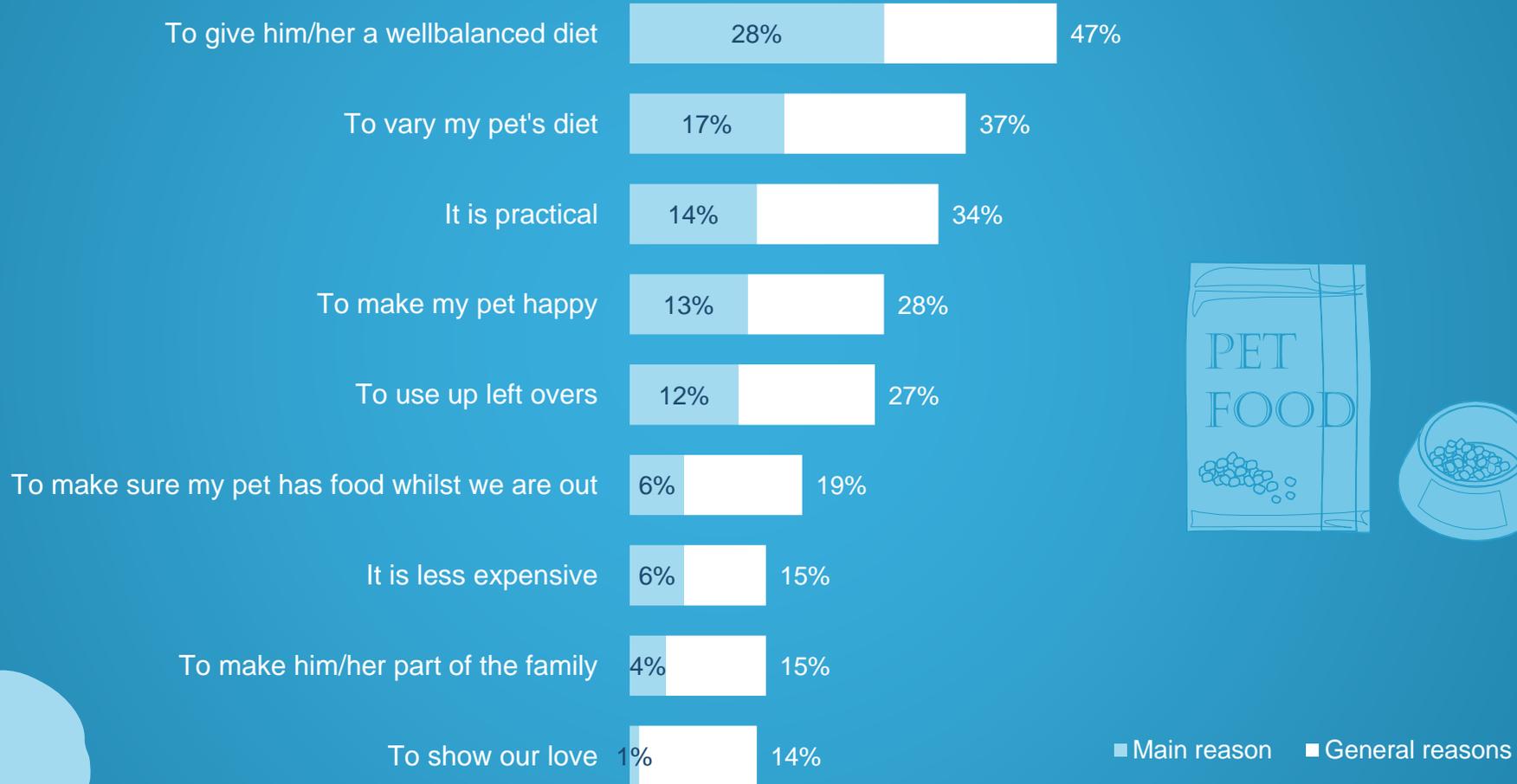
Base: All dogs who are fed manufactured and fresh food n=955

M12Q3: Why is your pet fed both fresh food and manufactured food?

M12Q5: And what is the main reason your pet is fed both fresh food and manufactured food?

# As with dogs, the reason cat owners feed their pet both fresh and manufactured food is to ensure their cat has a well-balanced, varied diet

## Reasons for feeding pet both fresh and manufactured food - cats



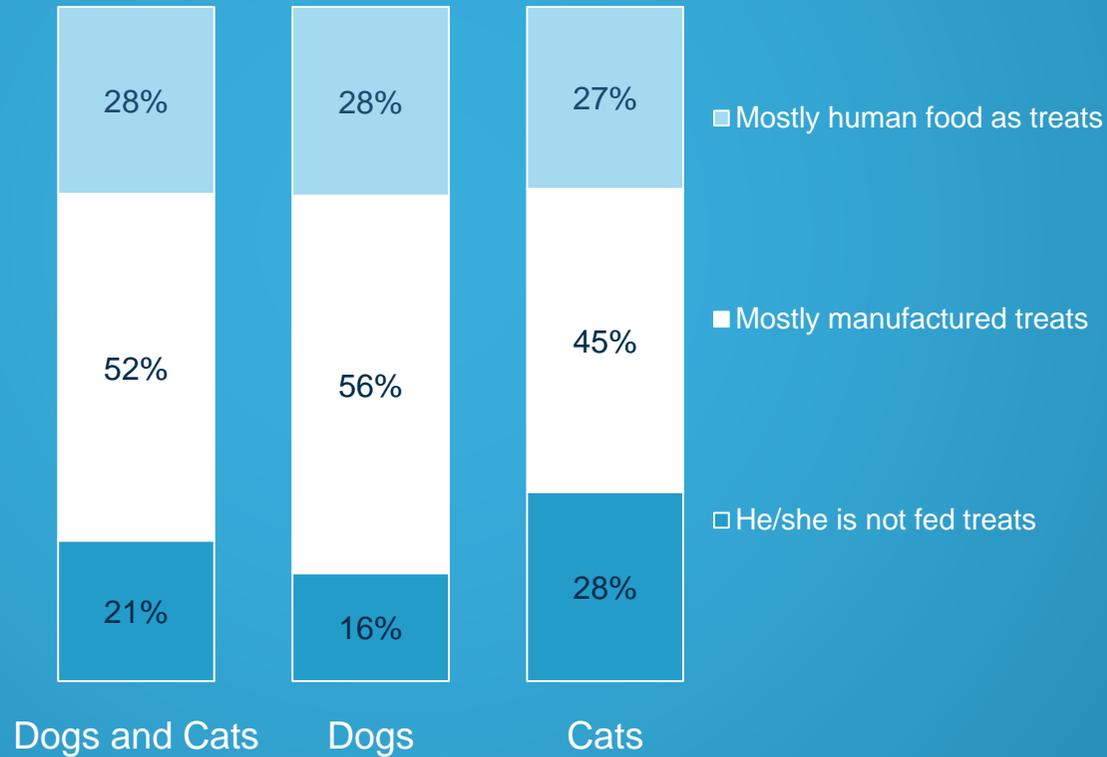
Base: All cats who are fed manufactured and fresh food n=599

M12Q3: Why is your pet fed both fresh food and manufactured food?

M12Q5: And what is the main reason your pet is fed both fresh food and manufactured food?

# Dogs are more likely to be fed treats than cats. For both dogs and cats, manufactured treats are more popular than giving human food for treats

## Treats fed in addition to main meal



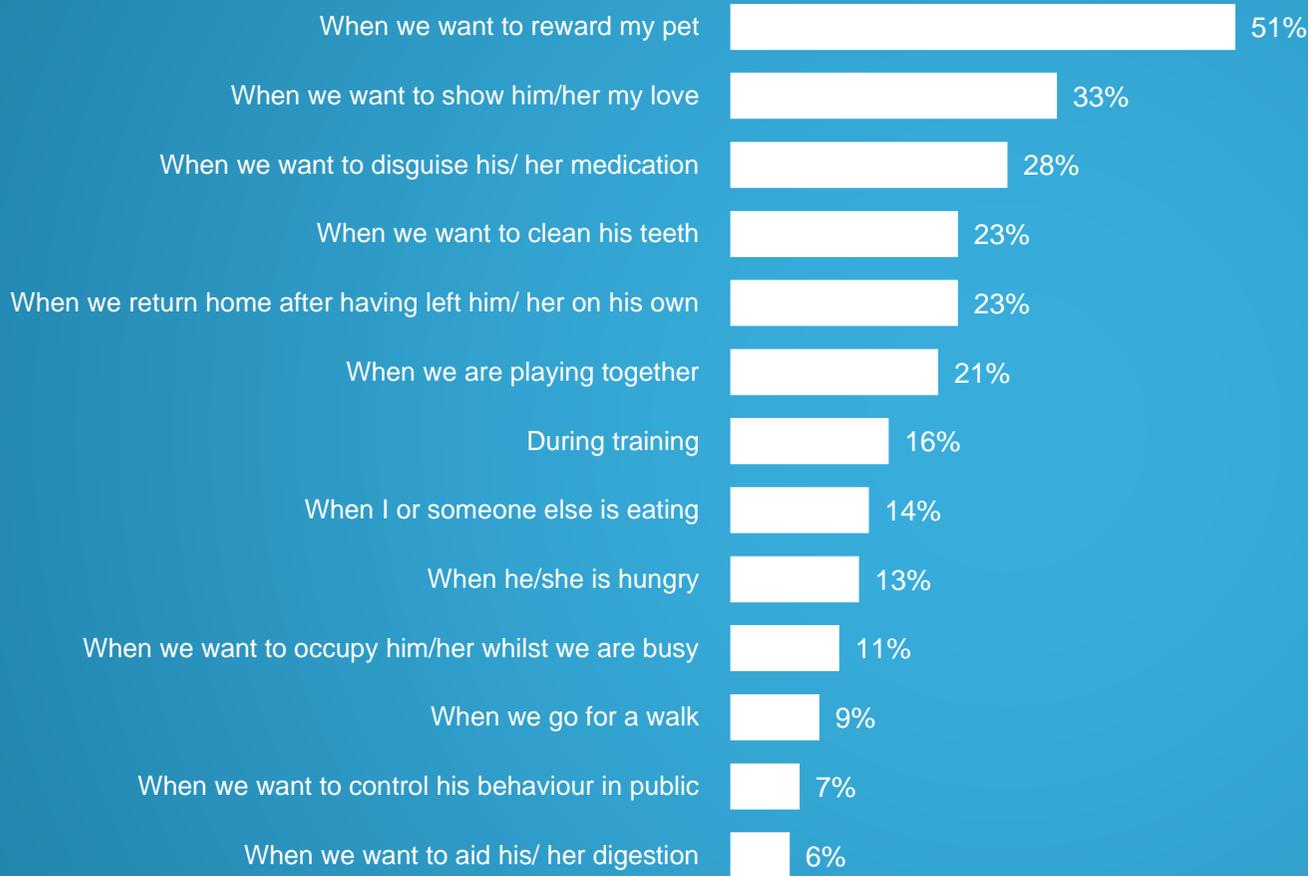
Base: All dogs and cats n= 2052 All dogs n=1235 and All cats n=817

M12Q8: In addition to your pet's main meal, is he/she fed treats?

# Dogs and cats are fed treats mostly as a reward and to be shown love but also for functional reasons, such as to help with teeth cleaning and when giving medication



## Reasons for treating – dogs and cats

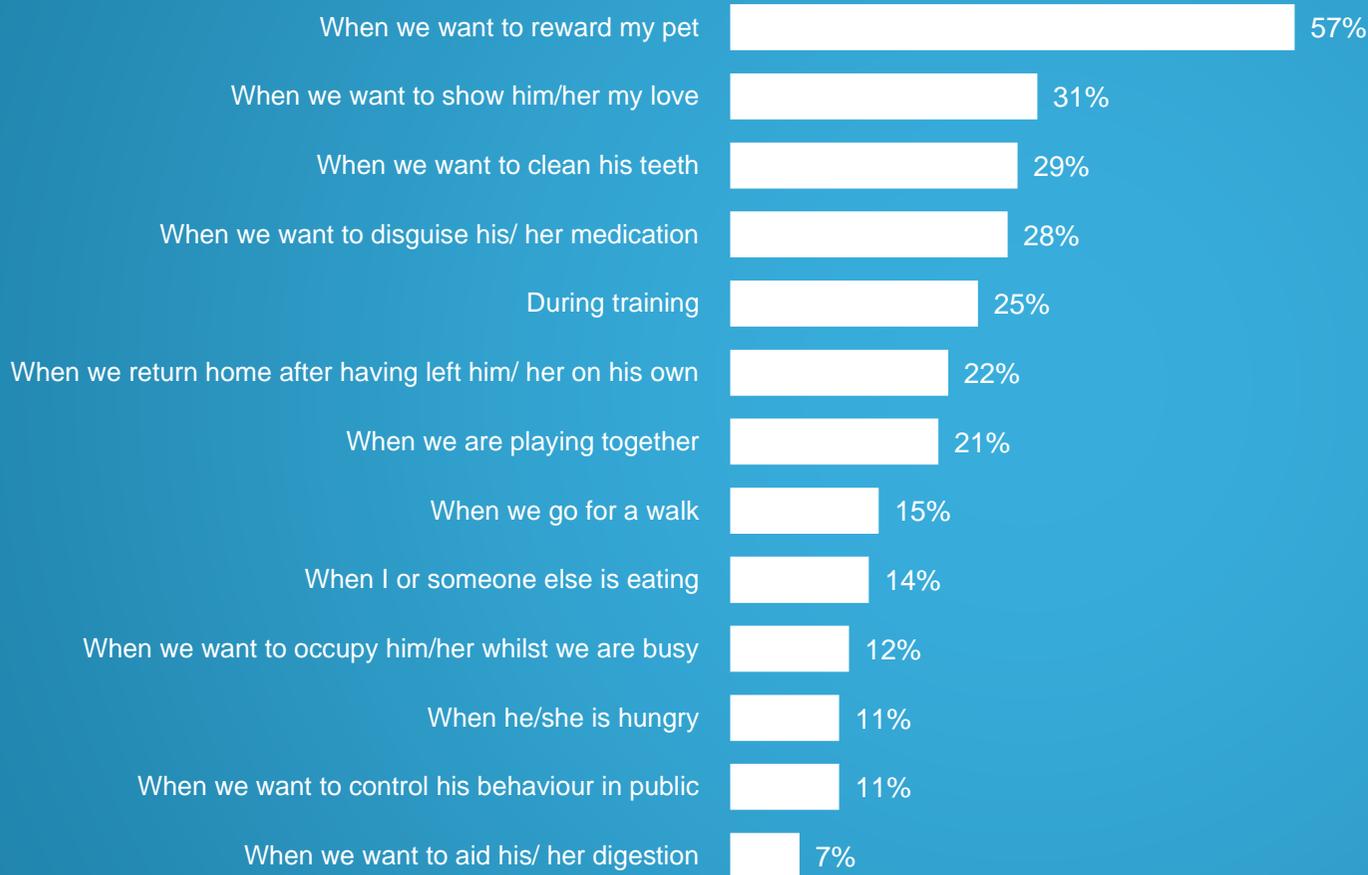


Base: All dogs and cats n= 1649

M12Q9: Which, if any, of the following occasions do you give your pet a treat?

# Similarly, dogs are fed treats mostly as a reward followed by to be shown love but also for functional reasons, such as to help with teeth cleaning, giving medication and during training

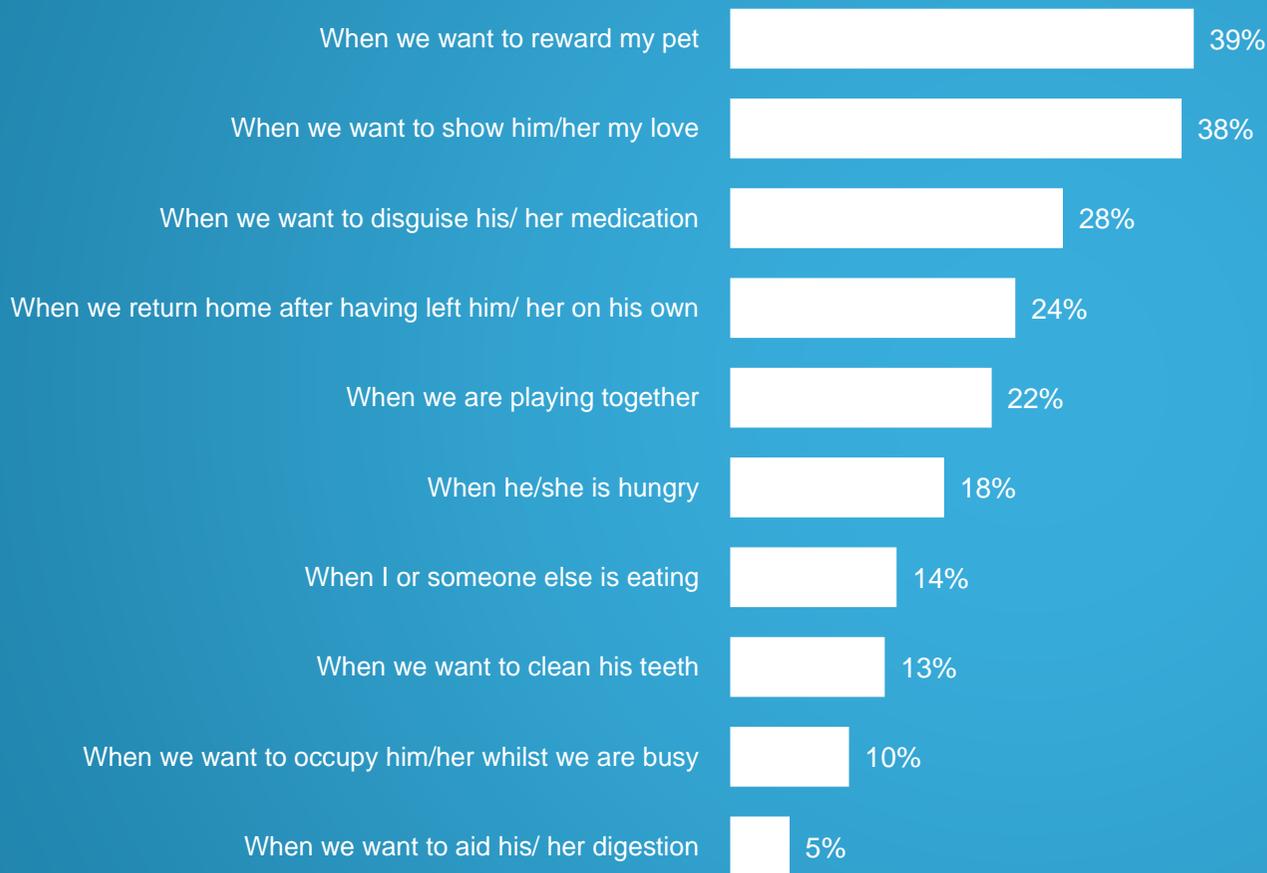
## Reasons for treating - dogs



Base: All dogs that are given treats n=1053

M12Q9: Which, if any, of the following occasions do you give your pet a treat?

## Reasons for treating - cats

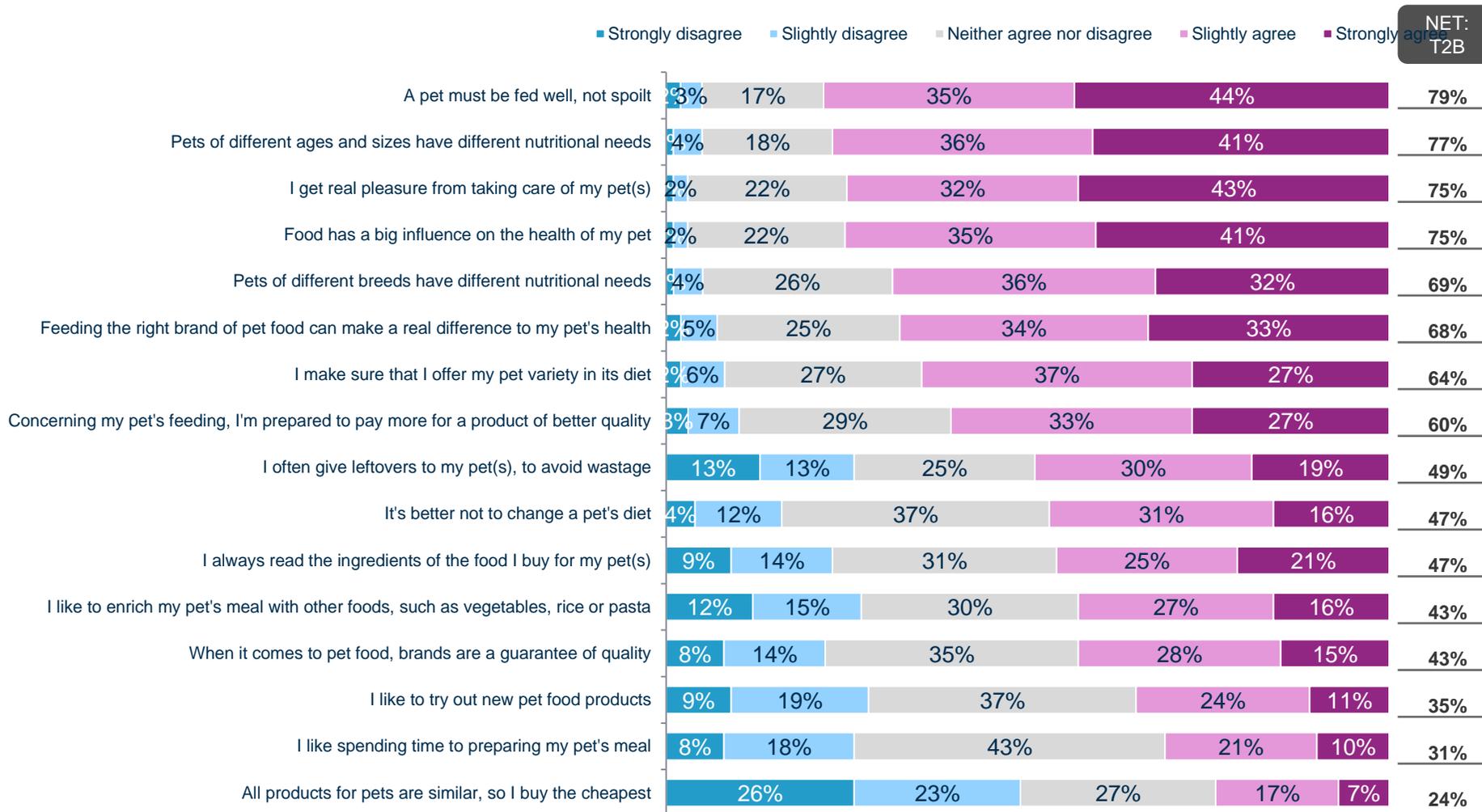


Base: All cats that are given treats n=596

M12Q9: Which, if any, of the following occasions do you give your pet a treat?

# Dog and cat owners believe that pets of different ages, sizes and breeds have different nutritional needs, and that food has a big influence on the health of their pet

## Opinions on feeding - dog and cat owners

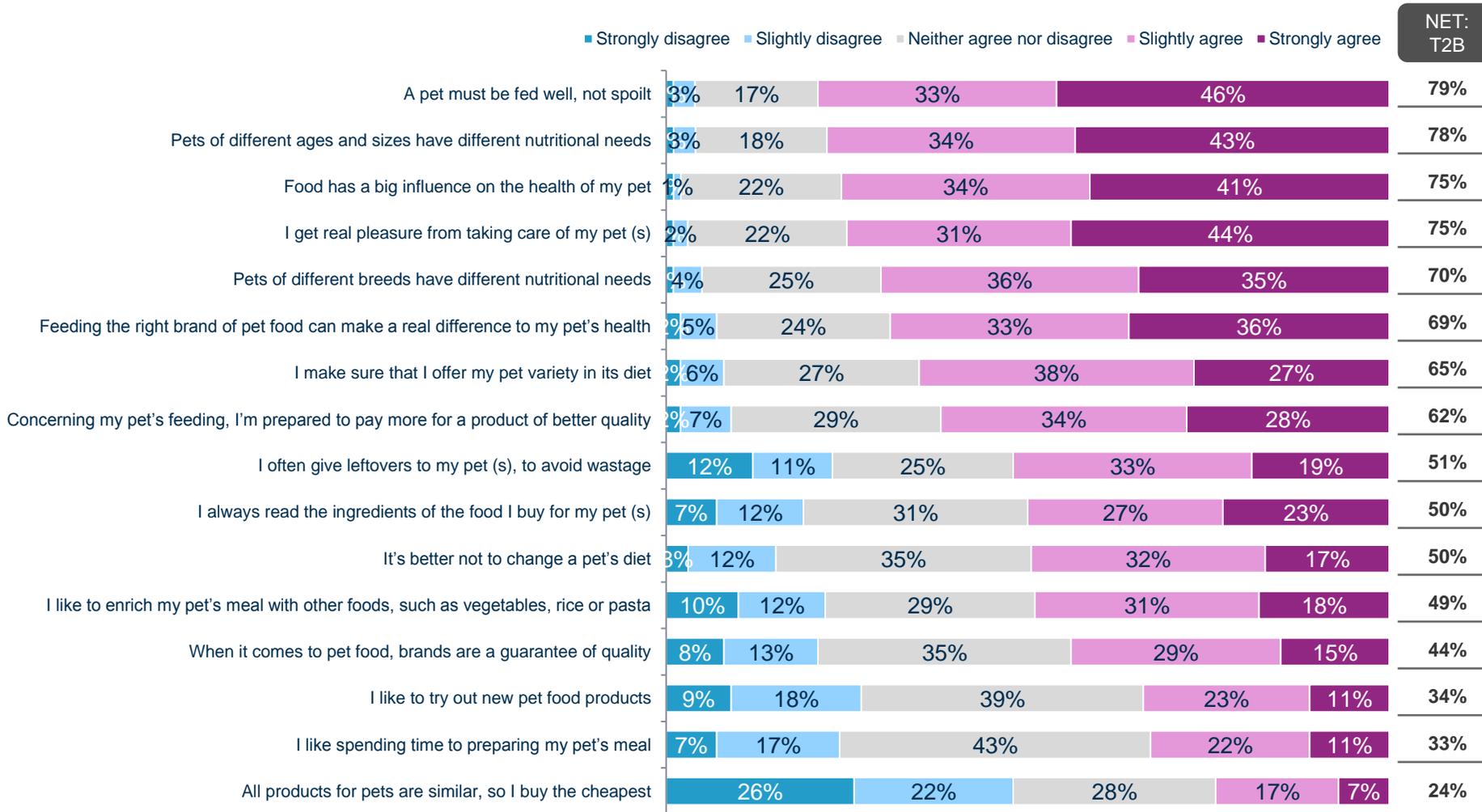


Base: All dog and cat owners n= 1221

M12Q10: To what extent do you agree or disagree with each of the following statements on feeding?

# Dog owners believe that pets of different ages and sizes have different nutritional needs. Most do not think that all products for pets are similar

## Opinions on feeding - dog owners

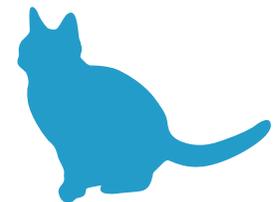
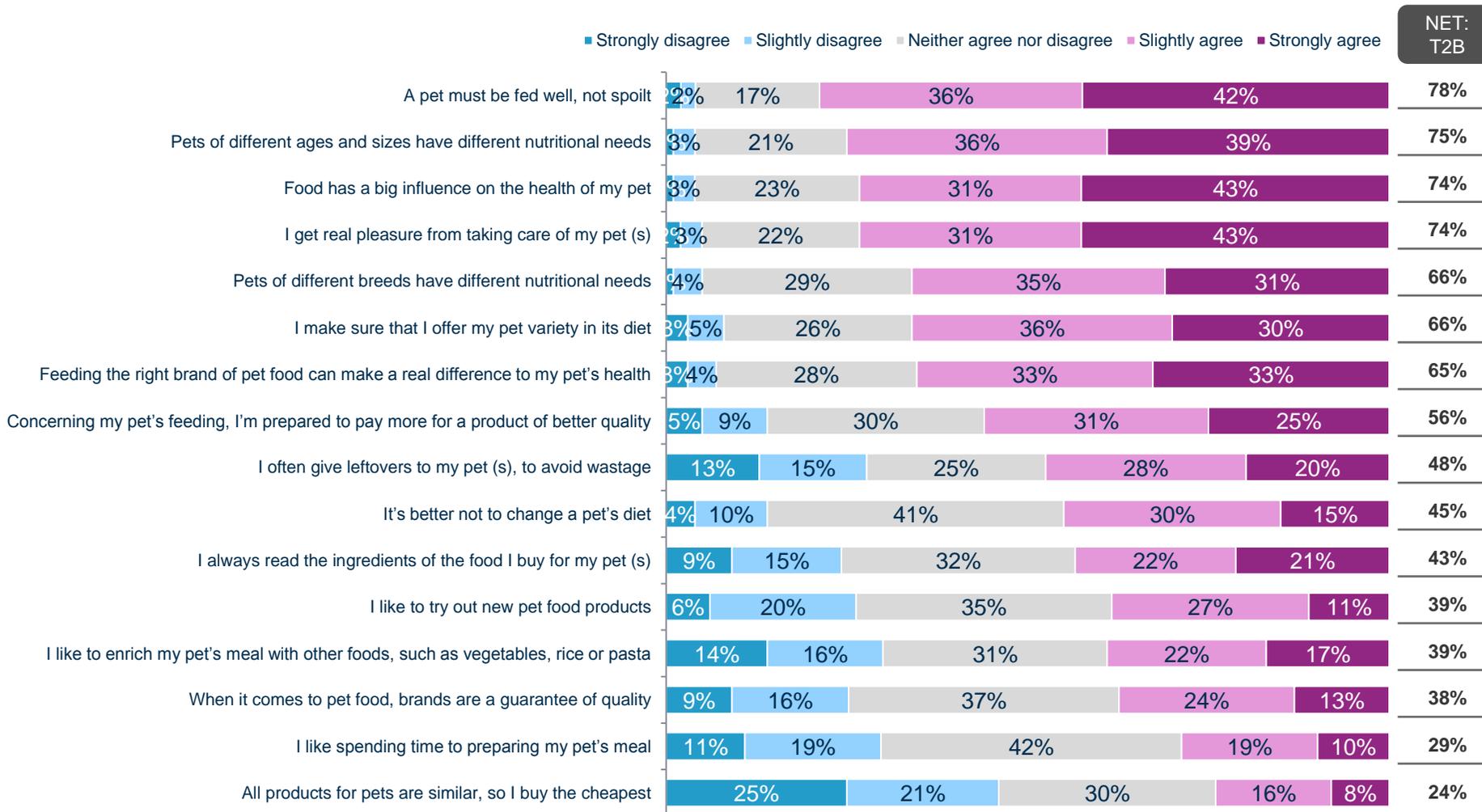


Base: All dog owners n=978

M12Q10: To what extent do you agree or disagree with each of the following statements on feeding?

# The majority of cat owners, like dog owners, agree that a pet must be well fed but not spoilt. The majority of cat owners also agree that food has a big influence on a pet's health

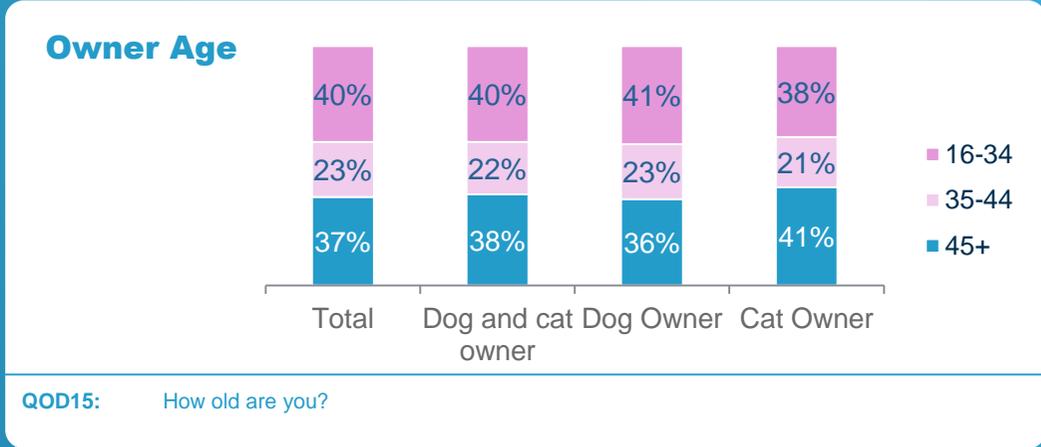
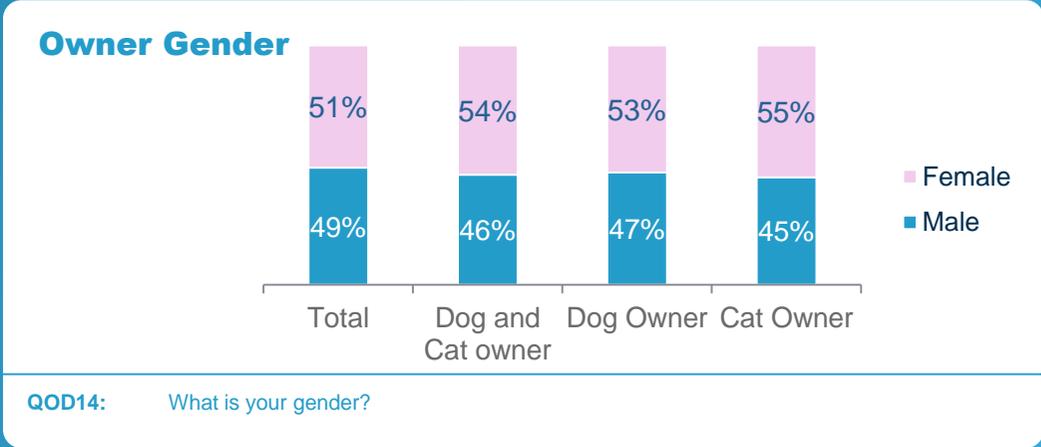
## Opinions on feeding - cat owners



Base: All cat owners n=587

M12Q10: To what extent do you agree or disagree with each of the following statements on feeding?

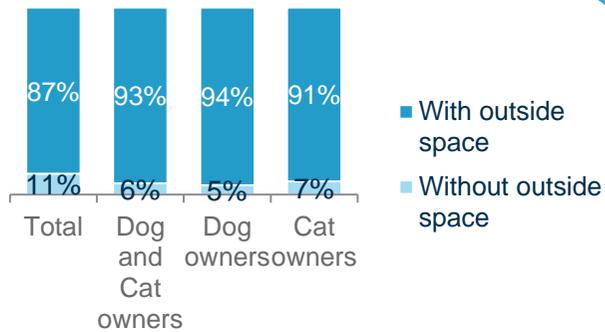
## Owner Demographics



Base: Total n=2000; All dog + cat owners n= 1238; All dog owners n=978; All cat owners n=587

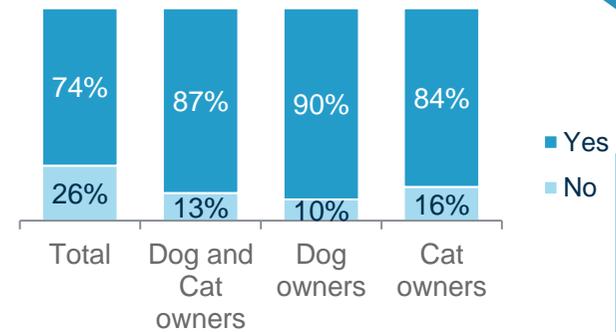
## Owner Demographics

### Type of Home



**QOD5:** In what type of home do you live?

### People at home during the day

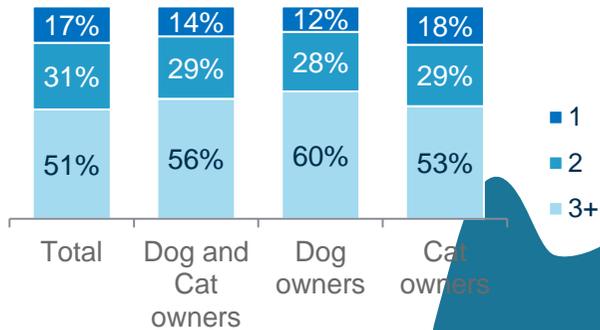


**QOD9:** During the daytime, on a typical weekday, is there usually someone around (aged 16 or more) who could be with a pet if you got one?

Base: Total n=2000; All dog + cat owners n= 1238; All dog owners n=978; All cat owners n=587

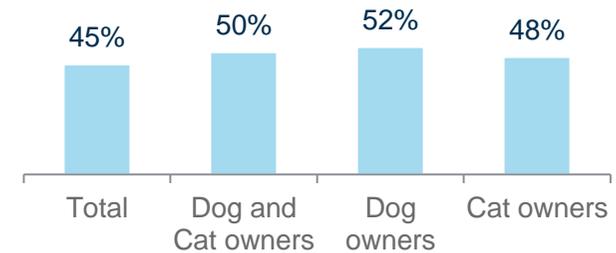
## Owner Demographics

### Number of of people living in the home



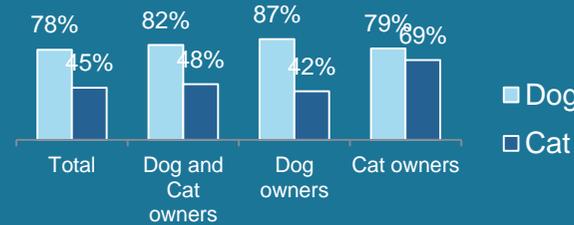
**QOD7:** How many people live in your home (including yourself?)

### Presence of children in household



**QOD8:** How many children are there living in your home?

### Grew up with a pet



**QOD1:** Did you or your partner grow up with a dog or cat during your childhood?

Base: Total n=2000; All dog + cat owners n= 1238; All dog owners n=978; All cat owners n=587