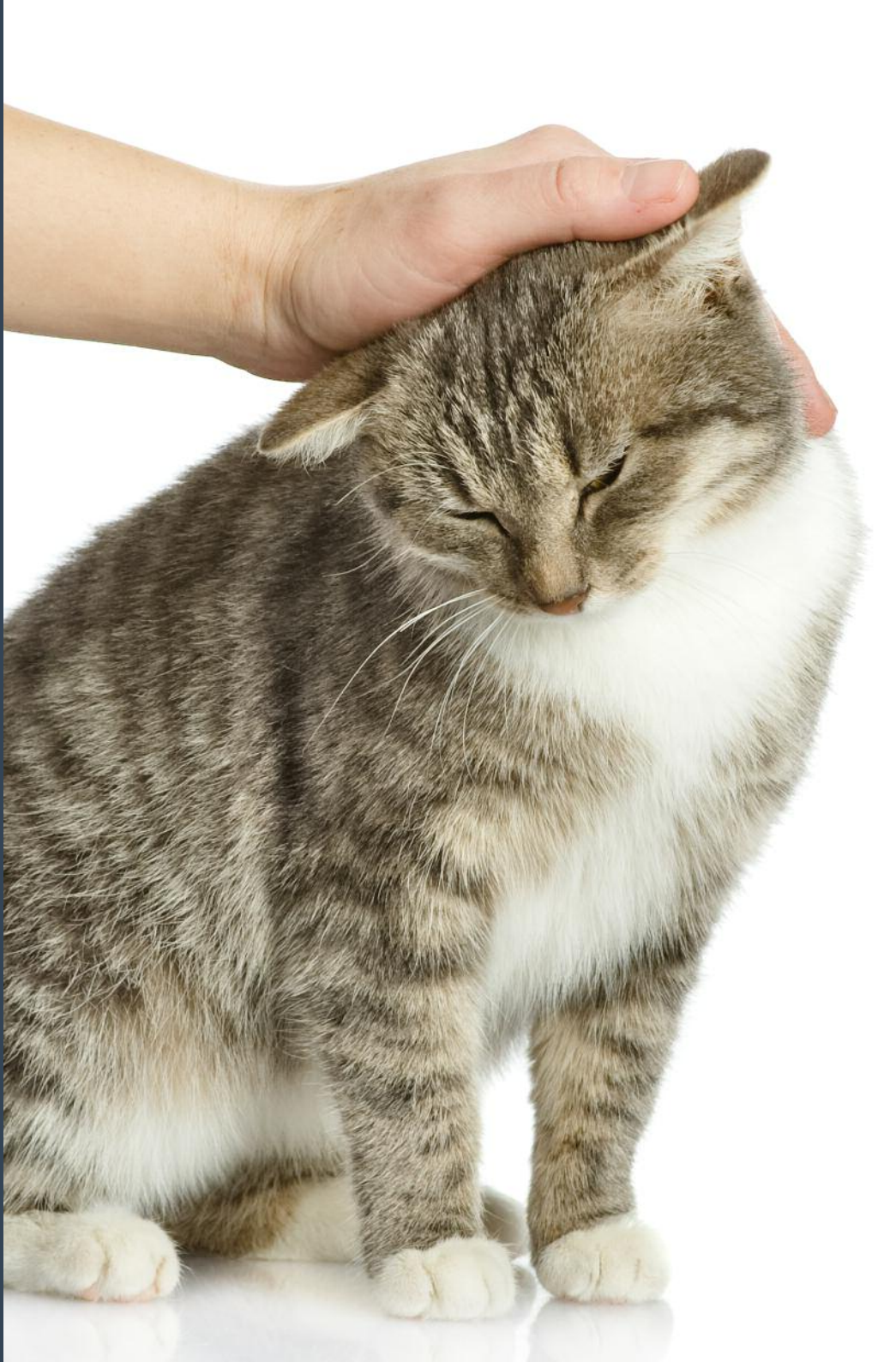


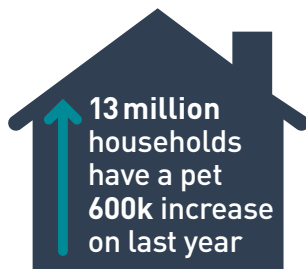
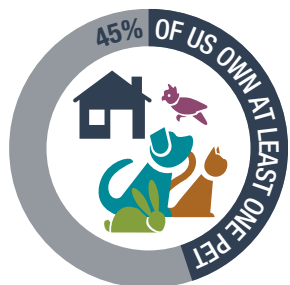


PFMA'S PET DATA REPORT 2018



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STATE OF THE NATION



Following the positive feedback from last year's inaugural Pet Data Report, we are now producing one every year to formalise the wealth of data we receive every March.

Since 2008, we have been tracking the UK pet population. The data is averaged across two years giving us a sample size of approx. 8000 households, which provides robust data.

The quality and accuracy of this data is critical as it is not only used by PFMA members but also a wide range of bodies including government departments, pet care businesses, welfare charities and the media. The data provides interesting facts and figures about all pet types – but it is also used to shape strategies.

In 2018, we are delighted to see a growing number of households with pets, which has been triggered largely by an increase in ownership among families. 45% of UK households (13 million) own a pet. This figure is 600,000 more than last year and rises to 53% when looking at households with children.

This year, PFMA also launches its three-year Pet Food Vision. We focus on the 3 pillars at the heart of our work – animal welfare, nutrition, safety and standards. During the first year, we are putting animal welfare in the spotlight and you can read about our research on this subject on page 14.

PFMA also works closely with charities to look in more detail at specific pet population and animal welfare matters. This year you can read about our research with Dogs Trust on pages 24 – 27.

We hope you enjoying reading about the latest dynamics of the UK's pet population





Nicole Paley
Deputy Chief Executive: Communications & Animal Welfare



Nicole's cat Hebe



UK PET POPULATION 2018

In 2018 a total number of 13 million households have a pet. This equates to 45% of all UK households.

Households Owning		
	9 million dogs	26%
	8 million cats	18%
	900,000 rabbits	2%
	500,000 indoor birds	1%
	500,000 domestic fowl	0.4%
	400,000 guinea pigs	1%
	300,000 hamsters	1%
	300,000 tortoises and turtles	0.8%
	200,000 lizards	0.5%
	200,000 snakes	0.4%
	200,000 horses and ponies as pets	0.3%
	100,000 rats	0.2%
	100,000 ferrets	0.1%
	100,000 gerbils	0.1%
	100,000 people keep insects	0.1%
	100,000 pigeons	0.04%
	100,000 frogs and toads	0.04%
	50,000 people keep mice	0.03%

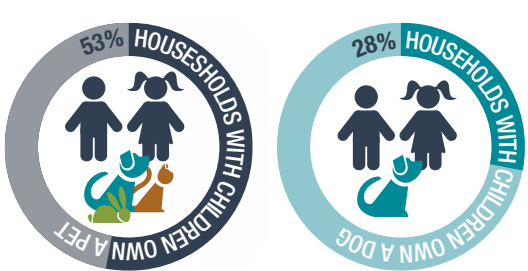
13M TOTAL HOUSEHOLDS OWNING A PET 45%







  There are 3 million indoor fish tanks (7% households) and 1.3 million outdoor ponds (based on updated methodology for 2018)

PET HIGHLIGHTS

2018 research highlights an increase in the number of households owning a pet. On closer inspection, it is clear that the rise can be attributed to an increase in families owning pets.



   
The number of households with children owning a dog has grown by 11% to 2.3m, 230,000 more than last year

Households with pets and children	2017 Households (%)		2018 Households (000s)	
	2017 Households (%)	2018 Households (%)	2017 Households (000s)	2018 Households (000s)
Cat	20%	21%	1,730	1,730
Dog	24%	28%	2,070	2,300
Birds (as Pets)	2.2%	1.3%	190	110
Small Mammals	8.2%	8.3%	710	680
Total Pets	50%	53%	4,300	4,400



PET HIGHLIGHTS



The UK dog population is now 9 million – 5% increase on last year



Dogs

A major change in 2018 is in the dog population – now 9 million. The dog population is 5% higher than last year – an increase of 400,000.

26% of households own a dog vs 25% in 2017. This is a percentage increase of 9% of households owning a dog – or 300,000 more households.

In 2018, of the households in the UK with children (8 million) 28% also had a dog, in 2017 this was 24%. This represents a change of around 230,000 households. There is a slight increase in the average number of dogs per household.

7 million households have at least one dog



Popular Breeds

The most popular breed of dog is the Staffordshire Bull terrier at 8% of the dog population.

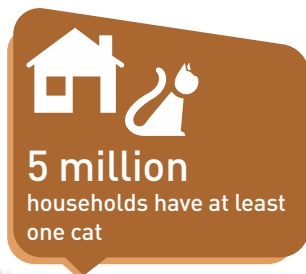
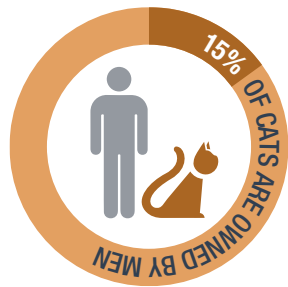


Breed	% of Dogs*
Staffordshire Bull Terrier	8%
Retriever (Labrador)	7%
Jack Russell	7%
Spaniel (Cocker)	4%
Shih Tzu	4%
Chihuahua (Smooth Coat)	3%
West Highland White Terrier	3%
Spaniel (English Springer)	3%
Cavalier King Charles Spaniel	3%
Yorkshire Terrier	3%
German Shepherd Dog	2%
Border Terrier	2%
Pug	2%
Border Collie	2%

- 27% are other pure breeds
- 23% are other cross breeds (including two defined – Cockapoo & Labradoodle, both 1% each)
- 10% are mongrels or unknown breeds
- 1% are other or don't know

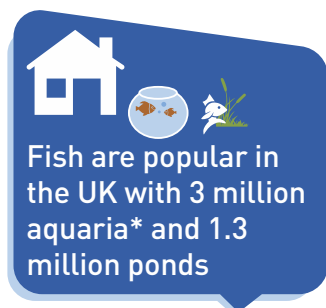
*This data is based on a sample of 4,000 rather than the usual 8,000. In the future, we will be able to look at rolling data and identify trends.





Cats

The cat population is at its highest for five years at 8 million. 18% of households own a cat, an increase from 17% last year. This equates to 140,000 more cats and 75,000 more cat owning households. It seems that the proportion of men owning cats has fallen back this year to 15% from 17%.



Fish

Based on this initial year of research, we see that 7% of households have at least one indoor tank and 3% have a pond. This equates to approximately 3 million tanks, of which 75% of households have one, 10% two and 15% of have three or more. 50% of indoor fish tanks are described as small, 23% medium, 18% large and 9% very large. There are approximately 1.3 million ponds, with 76% of households having one, 9% two, and 15% three or more ponds.

*Single year of data to be repeated in 2019. This compares to Germany 2.1 million and France 1.82 million [EU data from FEDIAF 2016].

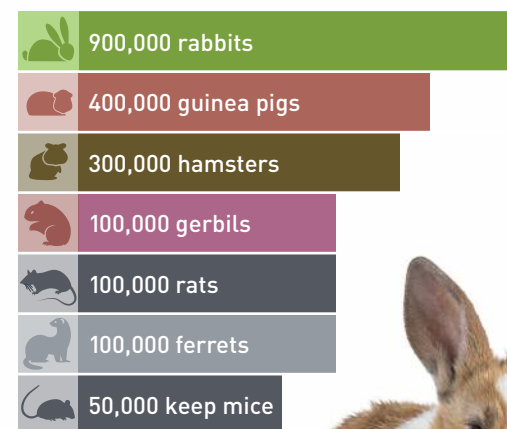
Birds

The indoor bird population is currently around 1.1 million. This includes domestic fowl, pigeons and indoor birds.



Small Mammals

The small mammal population is stable at 1.9million. Rabbits are still the most popular small mammals and the population stands at 900,000.

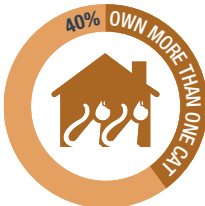


CATS AND DOGS PER HOUSEHOLD

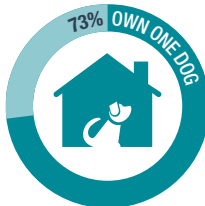
Of those households that own pets, most have one pet.



60%
have one cat



40%
have more than one cat



73%
have one dog



27%
have more than one dog

Number of Cats owned as pets

	TOTAL	AGE								
				16-24	25-34	35-44	45-54	55-64	65-74	75+
1 Cat	60%	61%	59%	61%	62%	56%	54%	64%	63%	69%
2 Cats	30%	33%	28%	27%	34%	33%	34%	24%	26%	22%
3 Cats	5%	3%	6%	7%	2%	5%	7%	5%	5%	7%
4 Cats	3%	2%	3%	3%		3%	3%	4%	2%	2%
5 or more Cats	3%	0%	4%	1%	2%	4%	2%	3%	5%	

26% of dogs are owned by women compared to 23% last year

More 25-35 year olds and 55-64 year olds own a dog

Number of dogs owned as pets

	TOTAL	AGE								
				16-24	25-34	35-44	45-54	55-64	65-74	75+
1 Dog	73%	72%	74%	74%	73%	76%	66%	73%	77%	85%
2 Dogs	21%	22%	21%	19%	22%	20%	27%	22%	16%	14%
3 Dogs	4%	4%	3%	4%	4%	4%	5%	3%	4%	1%
4 Dogs	1%	1%	1%		1%		2%	2%	1%	
5 or more Dogs	1%	1%	1%	3%	1%		1%	1%	1%	



REGIONAL PET POPULATION 2018

The table below gives the % households in each region who own at least one of the major pet species (average of last three years).

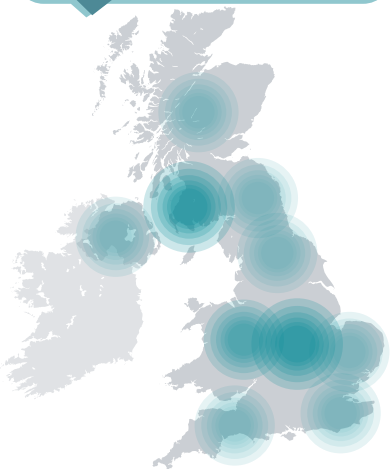
2015-2018	North East	North West	York & Humb	East Midlands	West Midlands	East of England	London	South East	South West	Wales	Scotland	Northern Ireland	UK
Indoor Fish	8	8	7	9	10	7	5	8	8	8	7	9	8
Outdoor Fish	2	4	3	5	5	5	3	7	5	3	1	1	4
Cats	14	16	16	20	17	18	14	20	22	22	14	16	18
Dogs	33	27	22	31	28	21	9	23	26	29	23	35	26
Rabbits	2	2	3	4	2	2	1	2	2	2	1	1	2
Guinea Pigs	1	1	1	1	1	1	0	1	1	1	1	0	1
Indoor Birds	2	2	1	2	2	1	1	2	1	1	1	1	1
Hamsters	0	1	1	1	1	0	0	1	1	1	1	2	1
Sample	523	1417	1095	912	1099	1161	1522	1726	1098	620	1089	376	12640



Dog Population 2018

	% Population	Households (000s)	Per Household	Per Region (000s)
North East	33	425	1.3	544
North West	27	825	1.3	1053
York & Humb	22	545	1.4	773
East Midlands	31	750	1.5	1111
West Midlands	28	635	1.3	803
East of England	21	585	1.4	810
London	9	190	1.2	223
South East	23	950	1.4	1320
South West	26	560	1.4	800
Wales	29	460	1.4	647
Scotland	23	485	1.3	653
Northern Ireland	35	195	1.4	264
United Kingdom	26	6604	1.4	9000

Dogs up by 400,000.
Dogs have increased in popularity in Northern Ireland and in the Midlands.



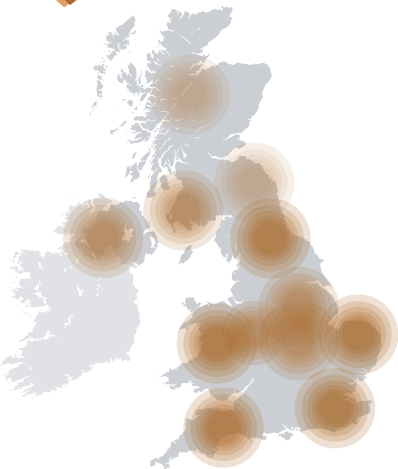
Density of Regional Dog Population



Cat Population 2018

	% Population	Households (000s)	Per Household	Per Region (000s)
North East	14	195	1.5	286
North West	16	520	1.5	795
York & Humb	16	415	1.6	648
East Midlands	20	480	1.8	854
West Midlands	17	400	1.7	662
East of England	18	500	1.8	876
London	14	310	1.5	470
South East	20	890	1.6	1422
South West	22	500	1.5	745
Wales	22	360	1.7	596
Scotland	14	320	1.6	497
Northern Ireland	16	105	1.4	147
United Kingdom	18	4995	1.6	8000

Cats up by 140,000.
Cat population is healthy –
The highest it's been for five years

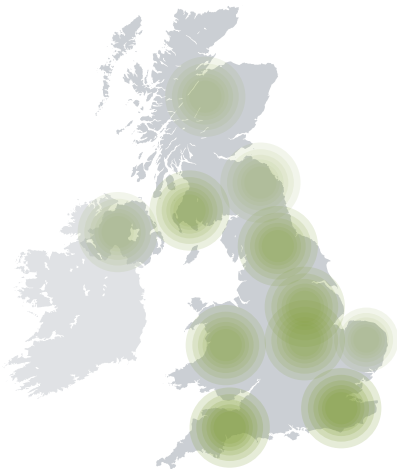


Density of Regional Cat Population



Small Mammals Population 2018

	% Population	Households (000s)	Per Household	Per Region (000s)
North East	3	38	1.1	40
North West	2	79	1.0	80
York & Humb	3	75	1.5	110
East Midlands	9	219	1.5	340
West Midlands	7	156	1.9	290
East of England	4	129	1.4	180
London	2	36	1.3	50
South East	5	218	1.6	350
South West	6	139	2.1	300
Wales	4	64	2.3	150
Scotland	3	70	0.6	50
Northern Ireland	2	15	3.1	50
United Kingdom	4	1118	1.6	1990



Density of Regional Small Mammals Population

ANIMAL WELFARE

Animal welfare is fundamental to the PFMA and we believe that the five welfare needs are essential to the well-being of any animal. PFMA members are experts in pet nutrition, however the PFMA supports broader animal welfare matters and actively participates in forums such as the All Party Parliamentary Group for Animal Welfare & the Canine Feline Sector Group.



Welfare Standards

PFMA surveyed the public for their views on animal welfare when making food purchasing decisions. When purchasing meat, how important is it that animals are raised with high animal welfare standards? (2121 sample size).



75% believe high welfare standards are important. Looking more closely at pet owners (823 sample size), this figure increases to **84%**.

Government Subsidies

When questioned whether government should fund farmers to have higher welfare standards for farmed animals, 79% of pet owners agreed they should (vs. 70% non-owners, 76% all households).



We recognise that education is an important aspect of animal welfare and PFMA helps communicate these welfare messages to a broader audience as a trustee of National Pet Month and through our support of the Animal Welfare Education Alliance.



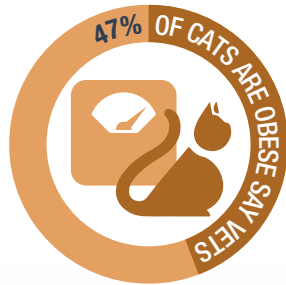
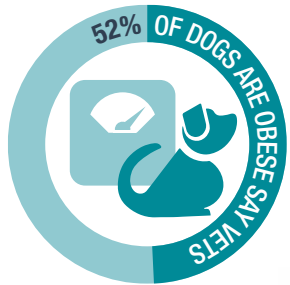
64% of the British public believe that an understanding of pets' needs should form part of the National Curriculum



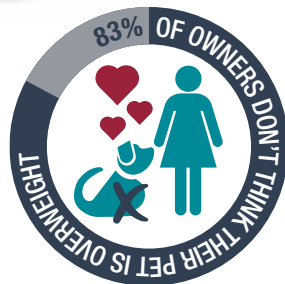
NUTRITION RESEARCH

Vet and Pet Owner Research

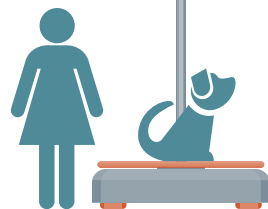
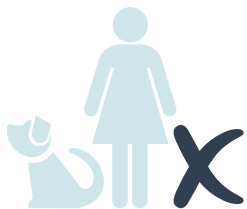
At London Vet Show, we have run the same nutrition survey for over five years in order to compare data and investigate trends. This year, a record 215 attendees took part in our survey and the latest findings confirm:



Although vets highlight that a significant proportion of pets are overweight, owners are seemingly unaware. 14% said they carry out regular weight checks (34% every few months, 7% when remember, 13% rarely and 32% never do this)

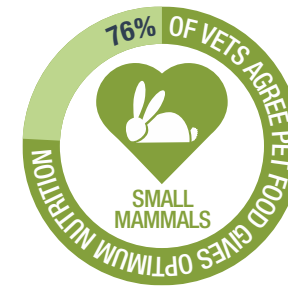


1 in 3 owners never weigh their pet



FEEDING HABITS

This year we asked vets about their thoughts on feeding habits for different pet types. We discovered that:



91% of vets agree that commercially prepared food provides optimum nutrition for cats and dogs when fed correctly, 76% agree for small mammals and 80% agree for pet birds.

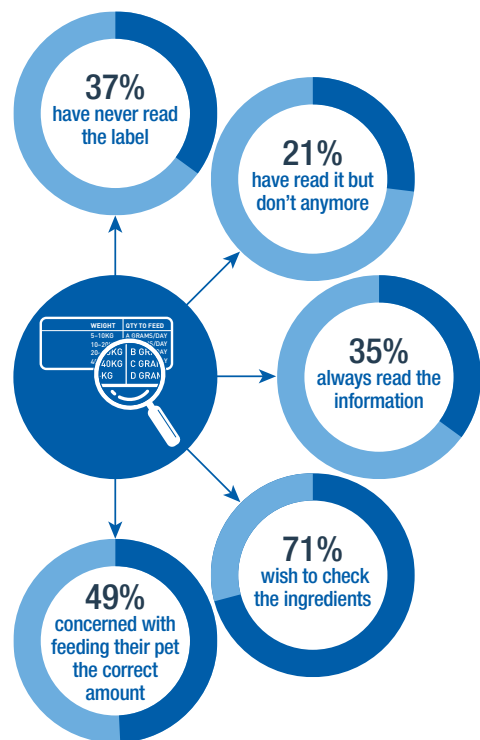
When asked about feeding scraps and leftovers it is possible that owners underestimated their answers. However, 41% admitted they did (31% sometimes and 10% often). 59% claim that they do not feed leftovers.



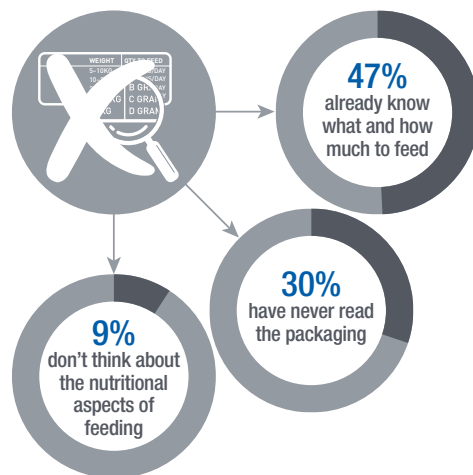


UNDERSTANDING THE LABEL

PFMA endeavours to highlight the importance of reading the pet food label. Every pet is different but manufacturers follow strict legislation to label food – highlighting nutritional content. During our research, we spoke to 823 pet owners with more detailed questions. PFMA produces educational tools to help owners understand the label and pet food ingredients.



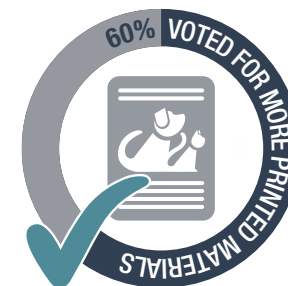
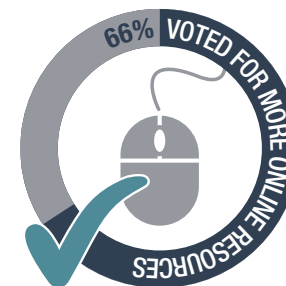
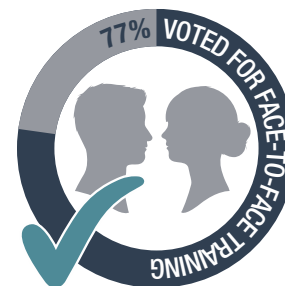
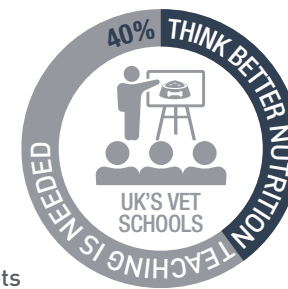
Why don't owners read the label?



NUTRITION EDUCATION

We asked veterinary professionals at LVS which training methods or resources they would like to improve their knowledge on nutrition.

77% of vets would like more face-to-face training
66% would like more online resources
60% requested more generic educational posters and leaflets










EDUCATIONAL TOOLS

Many charities and organisations – including the PFMA – endeavour to raise awareness of the dangers of obesity and the importance of good nutrition. PFMA prides itself on excellent nutrition-themed factsheets and tools to help educate pet professionals and owners on the subjects of pet nutrition, food and weight management.



MARKET DATA SUMMARY

The UK pet food market experienced slight growth again in 2017 (in value terms) and continues at an all time high of £2.6bn. The wild bird market shows a growth in value terms. Volume growth is flat in most sectors although 2017 data shows an increase in wild bird.

	Volume (000 tonnes)	Value (£m)
 Dog	830	1,371
 Cat	388	1,141
 Small mammals	67	65
 Fish	3	67
 Indoor Birds	12	11
Total Pet	1,300	2,655
 Wild Bird	148	210
 Pigeon	5	6
Overall Total	1,453	2,871



“Our latest data has shown that the pet food market continues at an all-time high of £2.6 billion. The most dynamic areas of growth in both the cat and dog food markets, have been in specialist, niche products, including those with health benefits. The rabbit food segment is the largest of the three small mammal markets and in terms of feeding the birds, overall the market has shown growth.”

MICHAEL BELLINGHAM – CHIEF EXECUTIVE



WILD BIRDS AND FEEDING HABITS

Amongst the 93% of households with some form of outdoor space, 43% of households feed wild birds. Older householders are more likely to feed wild birds as are those who also have pet birds. Younger households (with children) are less likely to feed wild birds.

% of those with homes with outdoor space feeding wild birds

	All	AGE						
		16-24	25-34	35-44	45-54	55-64	65-74	75+
Feed wild birds	43%	20%	27%	34%	50%	53%	64%	62%
Don't feed wild birds	57%	80%	73%	66%	50%	47%	36%	38%

	All	Children	No Children	Own Cats	Own Indoor Birds	Conurbation	Urban	Rural
		34%	47%	45%	64%	34%	44%	53%
Feed wild birds	43%							
Don't feed wild birds	57%	66%	53%	55%	36%	66%	56%	47%

The time of year most associated with the feeding of wild birds is winter, when 51% say they feed over this season. This proportion grows in rural areas (to 57%) and this is an on going theme as rural dwellers are more likely to feed the birds than their urban counterparts.

% feeding at each time/occasion

	All	Conurbation	Urban	Rural
Winter	51%	39%	54%	57%
Spring	36%	27%	37%	41%
Summer	35%	32%	34%	41%
Autumn	35%	27%	35%	44%

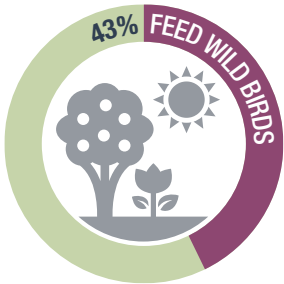


The overwhelming majority (73%) said they did it because they enjoyed seeing the birds in their garden, a further 31% said that they like to supplement the food available in winter.

PFMA Lesson Plans to Reconnect School Children with Nature



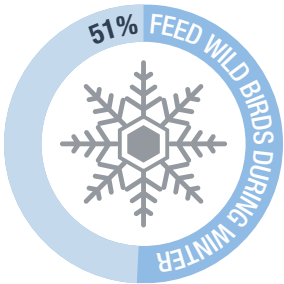
PFMA has developed a series of educational resources, such as maths and English lesson plans, to help improve children's understanding and appreciation of wild birds, as well as numeracy and literacy skills. Visit www.pfma.org.uk/bird-education for more information.



Of the 93% of households with outdoor space, 43% will feed wild birds



Early retirees (65-74) make up two thirds of bird feeders

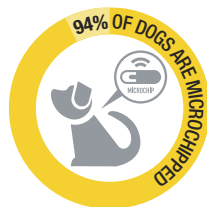


DOGS TRUST

For a number of years, Dogs Trust has contributed to PFMA research, looking at specific areas of interest such as microchipping, neutering, training, acquisition and giving up a pet. All questions have been asked of a sample size of 992 dog owners.

MICROCHIPPING

Since compulsory microchipping came into effect in 2016, we have seen increased awareness levels of dogs being microchipped. However, levels have now plateaued. 2018 figures are very slightly up on 2017 – 94% in 2018 versus 93% in 2017. All regions showing 90% or more with the exception of East Midlands (86%), Wales (89%) and Northern Ireland (90%).



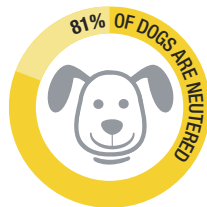
Of the 11% who have moved house, 6% had updated the database, 3% had not updated it, 1% could not remember.

The possible responses for updating the database changed in 2018 (from 2017) however the main theme is that most owners either updated the database themselves (44%) or they told their vet who updated it for them.

NEUTERING

There has been an increase in the percentage of dogs being neutered. 81% of households vs 68% in 2017.

Regional data shows that this level is consistent, although the West Midlands and Wales are showing significantly lower levels of neutering with 74% and 70% respectively.



TRAINING

Dogs Trust updated its training questions this year to look at 'puppy parties'. 90% of dog owners said that they had not taken their dog (including puppies) to either a training class or puppy party during the last month. 6% said that they had, 3% that they had not in the last month but had done further in the past, an additional 3% said that they had not been to a class but planned to.



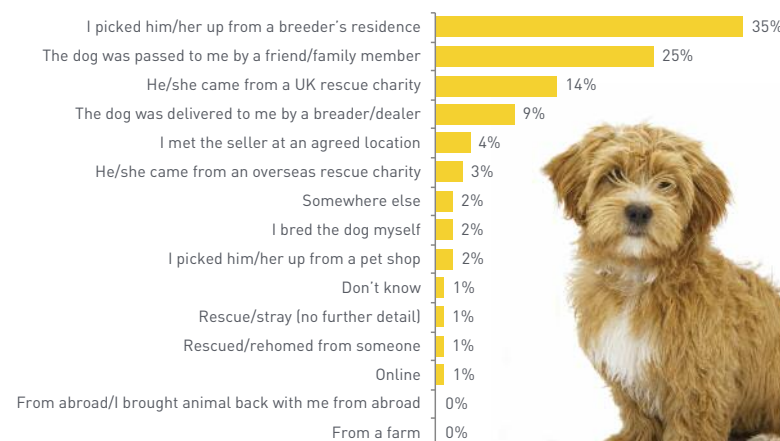
Looking at reasons why, owners claimed pets had already received training (53%), 29% want to do the training themselves. 4% do not believe that training classes would suit their dog and 4% do not believe that classes will help.

75% acquired a dog under one year old in 2018 and 2017. 12% had a pet passport, up from 9% in 2017.

ACQUISITION AND RELINQUISHMENT

Although the options given to respondents have changed slightly in 2018 the results are similar to 2017.

When asked about where their dog came from, 35% said they picked their pet up from the breeder (38% last year), 25% from a friend or family member (22% in 2017), 14% in both years from a UK rescue charity, 9% said the breeder delivered to their house in 2018 (7% in 2017).



GIVING UP

In 2018 the percentage who had to give up a dog is once again small – 7% compared to 8% in 2017. Although the sample size is very small, we can once again see some interesting trends. The most common route for rehoming is privately (40%), an increase of 15% on last year, 28% with a charity or rescue, an increase of 4% and 13% with family members or friends compared to 28% last year. 10% were put to sleep for behavioural reasons (11% last year).



Source: TNS/Soulor Consulting Ltd, January 2018: All dog owners asked, N 992 – 69.

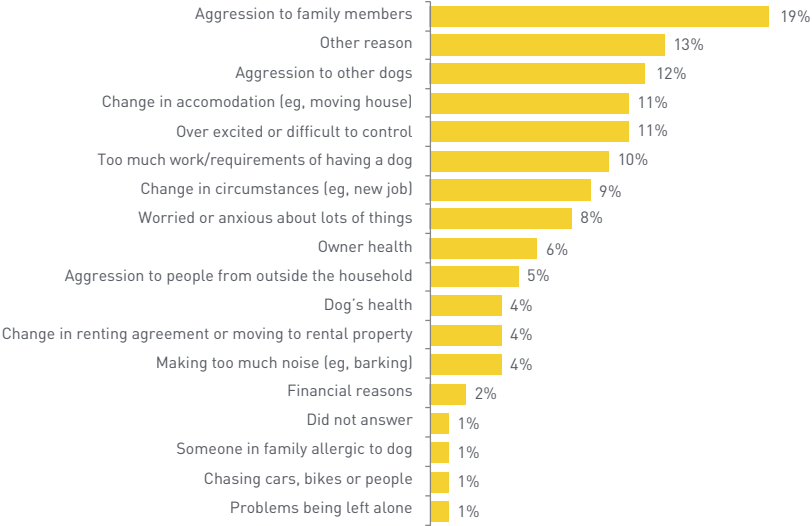
GIVING UP

As with 2017 the principle reasons for the dog being given up are behavioural. There is without doubt a direct link to this from the both the lack of training. This is also demonstrated with the age at which a dog was relinquished. Similar to 2017 the typical age was between 3-11 months and 4 years old.

3-11 months old	12%
1 year old	11%
2 years old	14%
3 years old	10%
4 years old	11%
5 years old	9%



REASONS FOR GIVING UP



METHODOLOGY

The annual PFMA Pet Population study has a data set, which covers the period from 2008 to 2018. The survey methodology is kept consistent to ensure that no bias is introduced into the process, which will adversely affect the data quality.



The survey is carried out by TNS, a globally recognised leader in consumer research, and is managed for the PFMA by external consultants. To keep costs under control the survey is part of an 'omnibus' study which TNS carry out every week, which clients can buy space in. The questionnaire for the PFMA study can change every year to include specific enquiries, which are not needed on an annual basis. However, the elements pertaining to the annual population survey are kept constant.

The sample size changed several years ago to ensure that the small animal populations were being adequately covered. To this end approximately four thousand households across the UK are sampled. This sample is based on naturally occurring demographics however there are quotas imposed for the different Government regions to ensure good geographic coverage.

For 2018 PFMA have taken the decision to follow the same methodology of reporting the ownership of fish as FEDIAF (the European umbrella organisation for pet food manufacturers). FEDIAF publish the number of indoor fish tanks that are owned in each European country. Therefore PFMA have collected this data in 2018 together with the number of (outdoor) ponds. This data will be collected from now on, which means in 2019 the sample size will be back to the standard 8,000 households based on a two year average as per the other pet populations. The reason for adopting this protocol (as per FEDIAF) is that it is extremely difficult to accurately quantify the number of fish in either indoor tanks or outdoor ponds, therefore it is more accurate to report the proportion of households who own either indoor or outdoor fish (tanks & ponds) rather than the specific number of fish.

From the TNS omnibus results, the proportion of households owning a pet (of whatever species) is applied to a calculated number of households in the UK (with the sources of data being the 2011 census and other Government published documents predicting the change in household numbers). These estimates are then multiplied (per species) by the average number of animals per household from the survey.

To ensure a large enough sample, the data are averaged across two years to arrive at a figure which is then published. This sample being ca. 8,000 households, the figure being arrived at by consulting industry standard sampling tables (for reference the sample has a Confidence Interval of 95% and Margin of Error of 1%).

Other sets of questions are sometimes asked in respect of Wild Bird feeding habits, general questions about pet ownership which can be asked in conjunction with pet charities.



*Single year of data to be repeated in 2019. This compares to Germany 2.1 million and France 1.82 million (EU data from FEDIAF 2016).

Also available:
2018 Annual Report



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