

BACKGROUND & PURPOSE

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The American Pet Products Association (APPA) was established to promote, develop and advance responsible pet ownership and the pet products industry. To this end, APPA supports industry-related market research, monitors and responds to industry legislation and regulation, and sponsors educational seminars, networking and PR opportunities, giving members the tools they need to make important business decisions. APPA also works closely with other major organizations dedicated to similar goals to accomplish these and other important objectives.

In 1988, APPA began gathering information about pet ownership, pet care practices, purchasing behavior of pet-related products and sources of pet-related goods and services. APPA’s objective is to monitor consumer habits on an ongoing basis to identify short- and long-term trends, as well as new opportunities in pet ownership and pet product and service consumption. In order to maximize the full value of the report, it is recommended that all readers go beyond the Executive Summary and thoroughly read each of the species sections.

METHODOLOGY

The 2019-2020 National Pet Owners Survey was conducted by The Engine Group (formerly, ORC International). Invitations to the online survey were sent to a nationally representative sample.

The Survey was divided into two parts—a screener and detailed pet owner module (questionnaire). 15,000 respondents completed the screener, of which 10,090 were current pet owners. Following the screener, there were eight different modules (questionnaires), each corresponding to a different type of pet—dog, cat, bird, small animal, reptile, freshwater fish, saltwater fish and horse. Upon completing the screener, pet owners selected for one of the eight follow-up modules (questionnaires) were then directed to complete the appropriate module (questionnaire) based on the type of pet they own. A total of 3,425 completed pet owner surveys are included in the tabulations. The table below shows the number of completed surveys for each pet type.

Module	# of Completed Surveys
Screeners	15,000
Dog	500
Cat	500
Bird	500
Small Animal	500
Reptile	500
Freshwater Fish	500
Saltwater Fish	175
Horse	250

2018 METHODOLOGY UPDATE

For 30 years, APPA’s National Pet Owners Survey has been one of the foremost providers of consumer insight research in the pet market. With a study of such longevity, it is necessary to periodically review the methodology to confirm it is reflective of both the research objectives and the current pet market.

After undertaking extensive research, APPA developed and implemented a plan to make some important updates to the National Pet Owners Survey in 2018. These updates ensure that the Survey is nationally representative of the U.S. population on key demographics and that the Survey is directed to the individual who is most responsible for the pets in the household (both purchasing pet products and general pet care).

Any change in methodology in a long-term study means the potential for differences between prior and current data. APPA has elected to follow research best practices and has not included data from prior survey years in the current report to encourage users to avoid direct comparisons between 2018 data and data from previous years. APPA cautions all users to consider this methodology change before making their own comparisons.

SAMPLE

The sample was balanced using U.S. Census targets for gender, age, region, race/ethnicity, income and household size. The data was not weighted, nor were any outliers removed, in accordance with APPA’s research practices.

The following table details the U.S. Census targets for each demographic used to balance the sample compared to the actual data collected.

Demographic	Target (from U.S. Census)	Actual (from total sample)	Difference to Target
	%	%	%
Gender:			
Male	48.2	45.7	-2.5
Female	51.8	54.3	2.5
Age:			
18-24	11.9	12.2	0.3
25-34	17.9	18.1	0.2
35-44	16.2	16.4	0.2
45-54	17.1	17.1	0.0
55-64	16.8	17.5	0.7
65+	20.1	18.7	-1.4
Region:			
Northeast	17.8	18.3	0.5
Midwest	20.9	20.9	0.0
South	37.6	38.6	1.0
West	23.7	22.2	-1.5
Race/Ethnicity:			
Hispanic	15.9	15.9	0.0
Non-Hispanic White Alone	64.0	66.1	2.1
Non-Hispanic Black Alone	11.8	10.3	-1.5
Non-Hispanic Other	8.3	7.7	-0.6
Income:			
Under \$25K	15.1	16.0	0.9
\$25K-\$44.9K	16.0	17.1	1.1
\$45K-\$74.9K	21.2	22.2	1.0
\$75K-\$99.9K	13.8	14.0	0.2
\$100K-\$149.9K	17.0	15.1	-1.9
\$150K+	16.9	15.5	-1.4
Household Size:			
1 member	23.9	23.0	-0.9
2 members	30.5	32.5	2.0
3-4 members	32.5	33.5	1.0
5+ members	13.0	11.1	-1.9

MARGIN OF ERROR

The margin of error is based on the rate of response for each questionnaire version. It should be used only for binomial or yes/no responses. These margins cannot be used for questions with means, as they have a confidence interval, which depends upon both the variance and sample size. Within the report, the percentages shown might vary by the margins (or number of percentage points) noted below if all pet owners in the U.S. were interviewed.

Module	Margin of Error
Screeners	+/- 0.8%
Dog	+/- 4.4%
Cat	+/- 4.4%
Bird	+/- 4.4%
Small Animal	+/- 4.4%
Reptile	+/- 4.4%
Freshwater Fish	+/- 4.4%
Saltwater Fish	+/- 7.4%
Horse	+/- 6.2%

QUESTIONNAIRE

As in previous years, a questionnaire revision process was conducted for the 2019-2020 Survey. Given the changes in methodology, considerable effort was made to maintain consistency across the questionnaires wherever possible.

Copies of the questionnaires for each pet type can be found at the end of each species section of this report. (Please note that the questionnaires appear in text-only format and not as they would be seen in an actual online survey.)

GENERATION DEFINITIONS

The 2019-2020 Survey employs the following definitions for each generation:

Generation	Year Range	Respondent Age
Gen Z	1995-2000	18-23
Millennial	1980-1994	24-38
Gen X	1965-1979	39-53
Baby Boomer	1946-1964	54-72
Builder	1925-1945	73+

DEMOGRAPHICS

At the end of each species section there are demographic tables. The first column reports the demographics of the Total Sample which includes all of the respondents who returned a questionnaire (15,000). These 15,000 questionnaires include both pet owners and non-pet owners in order to have a balanced sample of the U.S. population. These demographics were then used as a benchmark to which specific pet owner demographics were compared.

FOOTNOTES

Several footnotes appear at the bottom of certain tables and pages.

- An asterisk (*) denotes that the percent is less than 0.5%.
- Data that is “0” or “0%” is represented in all tables with a dash “-”.
- Certain columns will add up to more than 100% due to multiple responses.
- Where averages are included, a footnote will address whether that averages includes or excludes “0.”

OUTLET TYPE DEFINITIONS

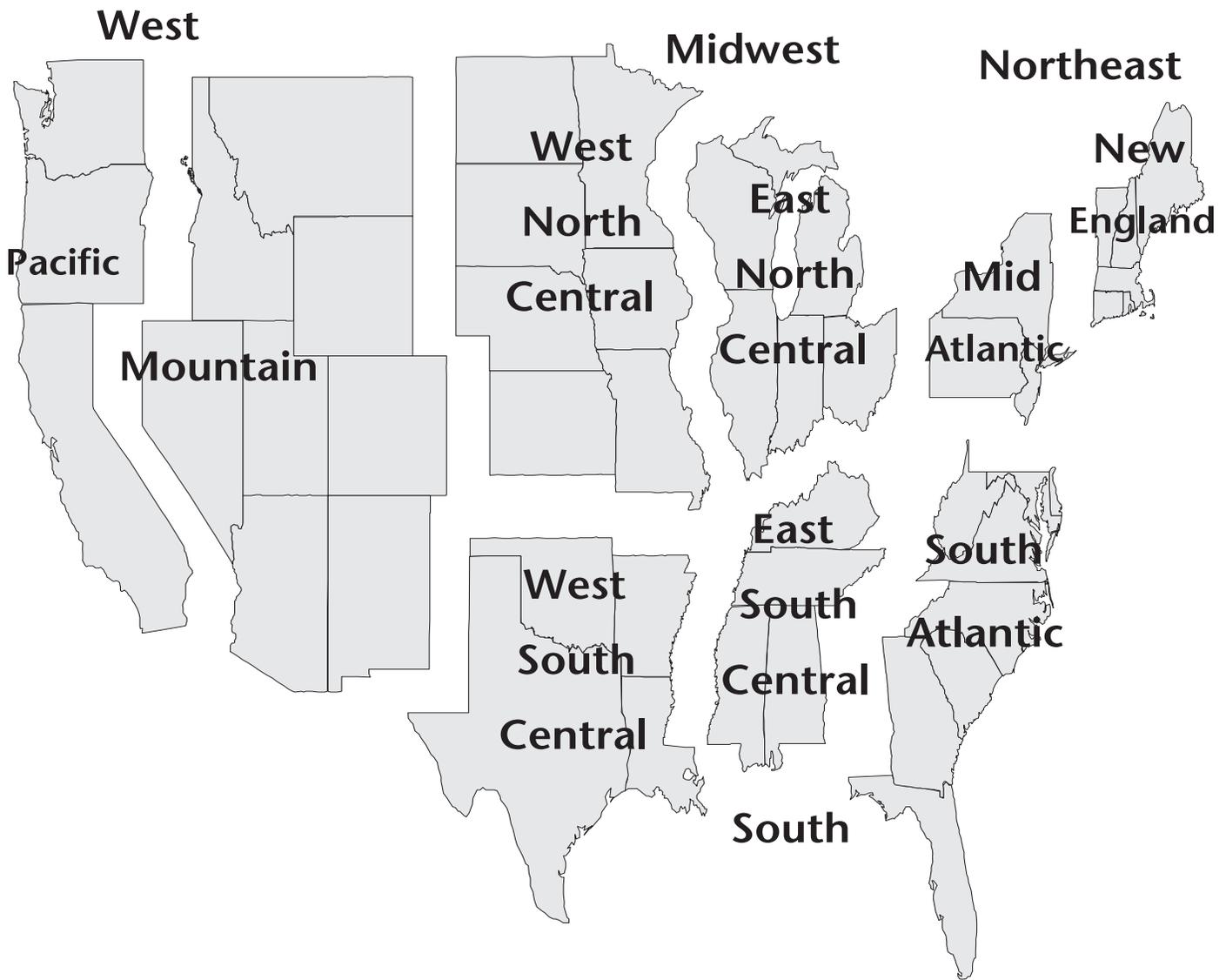
The following list of outlets was included in each questionnaire to ensure a common understanding of the definition of each store type.

Outlet Type	Examples
Discount/Mass Merchandiser	Costco, Fred Meyer, Kmart, Meijer, Target, Walmart
Feed Store/Agricultural Supplies	Agway, Rural King, Southern States Cooperative, Tractor Supply Company
Home Improvement/Hardware/Garden	Ace Hardware, The Home Depot, Lowe’s, ServiStar, True Value
Independent/Local Pet Specialty	An independent, locally-owned or neighborhood store selling pets and/or pet supplies
Internet/Online	Any purchase at a retailer’s online outlet (e.g., Chewy.com, Jet.com, Petco.com, PetFlow.com, 1800PetMeds.com, PetSmart.com, Walmart.com)
Mail Order	Doctors Foster and Smith, J-B Pet Supplies, PetEdge, Pet Supplies Delivered, RC Steele
Off-Price	HomeGoods, Marshalls, Ross, TJ Maxx
Pet Specialty Chain	Bentley’s Pet Stuff, Hollywood Feed, Kriser’s Natural Pet, Pet Supermarket, Petland Discounts, Pet Valu
Pet Superstore	Petco, PetSmart, Pet Supplies Plus
Supermarket	Food Lion, Kroger, Publix, Safeway, SuperValu, Stop & Shop, Vons, Winn-Dixie
Veterinarian	Retail/over-the-counter products offered at your veterinarian’s practice or through your veterinarian’s online store
Other	Any outlet type not named above

CUSTOM REPORTS

Additional proprietary custom reports are available based on the 2019-2020 Survey. Please call APPA’s Member Relations department for information about the types of reports that are available.

United States Census Regions



Pacific	Mountain	West North Central	West South Central	East North Central	East South Central	South Atlantic	Mid Atlantic	New England
California	Arizona	Iowa	Arkansas	Illinois	Alabama	District of Columbia	New York	Connecticut
Oregon	Colorado	Kansas	Louisiana	Indiana	Kentucky	Delaware	New Jersey	Maine
Washington	Idaho	Minnesota	Oklahoma	Michigan	Mississippi	Florida	Pennsylvania	Massachusetts
	Montana	Missouri	Texas	Ohio	Tennessee	Georgia		New Hampshire
	New Mexico	North Dakota		Wisconsin		Maryland		Rhode Island
	Nevada	Nebraska				North Carolina		Vermont
	Utah	South Dakota				South Carolina		
	Wyoming					Virginia		
						West Virginia		