



2023-2024

APPA National Pet Owners Survey



APPA[®]

American Pet Products Association

**APPA NATIONAL PET OWNERS SURVEY
2023-2024**

About APPA

The American Pet Products Association (APPA) is the leading U.S. not-for-profit trade association serving the interests of the pet products industry. Founded in 1958 with 35 member firms, APPA's membership currently includes over 800 pet product manufacturers, importers, manufacturers' representatives and livestock suppliers representing both large corporations and growing enterprises worldwide.

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.

Each year, APPA hosts Global Pet Expo, the pet industry's largest annual trade show. Global Pet Expo is the premier event in the pet products industry and enables APPA members to showcase their latest pet product lines.

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BACKGROUND & PURPOSE

BACKGROUND AND PURPOSE

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 2023-2024 National Pet Owners Survey was conducted by Big Village. Invitations to the online survey were sent to a nationally representative sample.

The Survey is traditionally conducted in two phases—a screener and detailed pet owner module (questionnaire). 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 9,868 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	15,002
Dog	3,512
Cat	3,508
Bird	531
Small Animal	522
Reptile	517
Freshwater Fish	673
Saltwater Fish	301
Horse	304

SAMPLE

The sample was balanced using U.S. Census targets for gender, age, region, race/ethnicity, income and household size. 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	47	-1
Female	52	53	1
Age:			
18-24	11	11	0
25-34	18	19	1
35-44	17	17	0
45-54	16	16	0
55-64	17	16	-1
65+	22	22	0
Region:			
Northeast	17	19	2
Midwest	21	20	-1
South	38	41	3
West	24	20	-4
Race/Ethnicity:			
Hispanic	17	14	-3
Non-Hispanic White Alone	63	66	3
Non-Hispanic Black Alone	12	13	1
Non-Hispanic Other	9	6	-3
Income:			
Under \$25K	13	15	2
\$25K-\$44.9K	14	17	3
\$45K-\$74.9K	20	22	2
\$75K-\$99.9K	13	14	1
\$100K-\$124.9K	11	8	-3
\$125K-\$149.9K	7	8	1
\$150K-\$199.9K	10	9	-1
\$200K+	13	8	-5
Household Size:			
1 member	25	26	1
2 members	32	33	1
3-4 members	32	31	-1
5+ members	11	10	-1

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	+/- 1.7%
Cat	+/- 1.7%
Bird	+/- 4.3%
Small Animal	+/- 4.3%
Reptile	+/- 4.3%
Freshwater Fish	+/- 3.8%
Saltwater Fish	+/- 5.7%
Horse	+/- 5.6%

QUESTIONNAIRE

As in previous years, a questionnaire revision process was conducted for the 2023-2024 Survey. 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 2023-2024 Survey employs the following definitions for each generation:

Generation	Year Range	Respondent Age
Gen Z	1995-2004	18-27
Millennial	1980-1994	28-42
Gen X	1965-1979	43-57
Baby Boomer	1946-1964	58-76
Builder	1925-1945	77+

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.”
- New items for the 2022 Survey are marked with a (^) and footnoted as such.

OUTLET TYPE DEFINITIONS

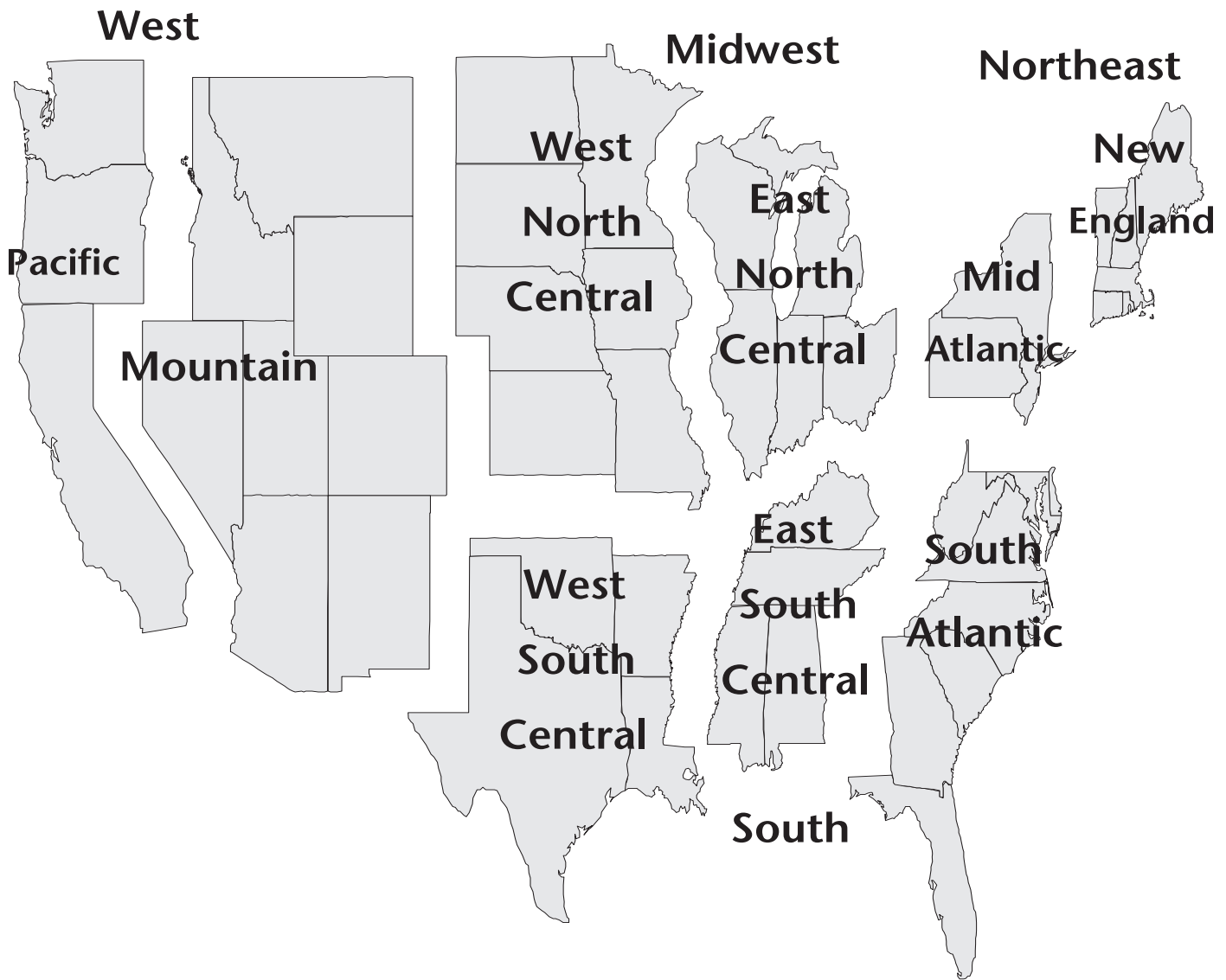
The following list of outlets was included in each questionnaire to ensure a common understanding of the definition of each store type. This list is representative of current outlets at the time the Survey fielded.

Outlet Type	Examples
Deep Discounter/Dollar Store:	Family Dollar, Dollar Tree, Dollar General
Discount/Mass Merchandiser:	Fred Meyer, 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, Menards
Off-Price:	HomeGoods, Marshalls, Ross, TJ Maxx, Burlington, Big Lots
Online Only Outlet:	Chewy, Amazon, Wayfair, Overstock, Barkbox
Pet Specialty–Independent/Local:	An independent, locally-owned or neighborhood store selling pets and/or pet supplies
Pet Specialty Chain:	Bentley’s Pet Stuff, Hollywood Feed, Kriser’s Natural Pet, Pet Supermarket, Petland, Pet Sense, Hollywood Feed, Wolfgang Bakery, Pet Food Express, Mud Bay, Feeders Supply, Chow Hound
Pet Superstore:	Petco, PetSmart, Pet Supplies Plus
Supermarket:	Food Lion, Kroger, Publix, Safeway, SuperValu, Stop & Shop, Vons, Winn-Dixie, Hy-Vee, HEB
Veterinarian:	Retail/over-the-counter products offered at your veterinarian’s practice or through your veterinarian’s online store
Warehouse club/store:	BJs, Costco, Sam’s Club
Other:	Any outlet type not named above

CUSTOM REPORTS

Additional proprietary custom reports are available based on the 2023-2024 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		