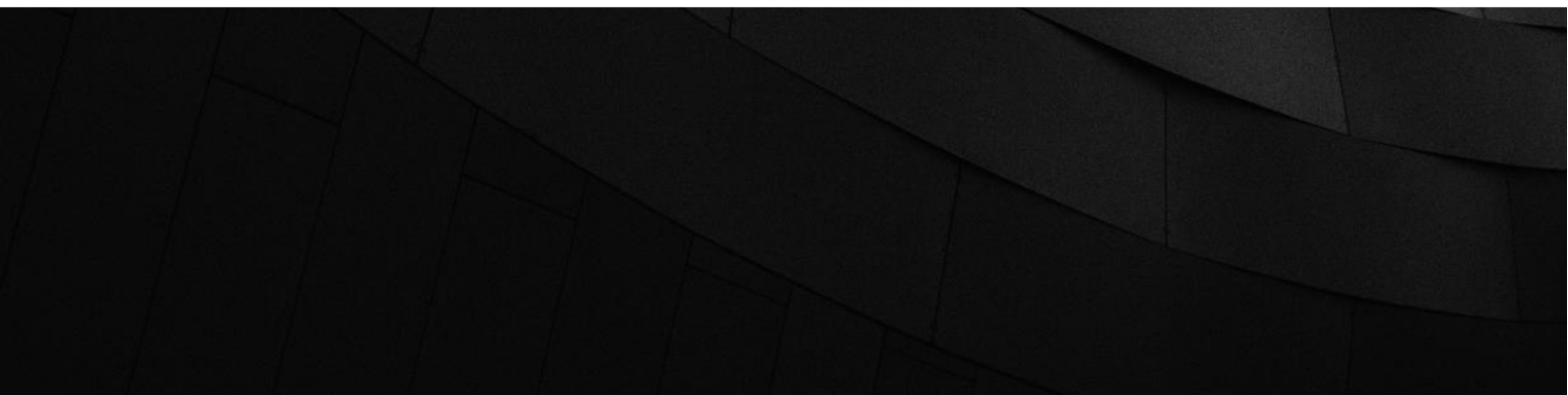


REAL INSURANCE

PETS

OCTOBER 2018



KEY FINDINGS

Pets are an integral part of the family

- Pets are an integral part of the family, with the vast majority of pet owners living with their family considering their pets as part of the family just as much as their partner and/or children and loving their pets just as much as they love their family.
- The overwhelming majority say their pets bring the family closer together, while the large majority say their pets allow the family to build a stronger relationship with each other, including by spending more quality time together.
- Indeed, the vast majority of pet owners living with their family typically do activities together, such as going for a walk, or watch TV together, with their pets.
- Furthermore, the large majority of pet owners living with their family have taken a family photo that includes their pets on at least one occasion.

Pet owners would consider their pets as one of their children

- The majority of pet owners would consider their pets as one of their children, and the vast majority say they know others who consider their pets as one of their children.
- Indeed, the vast majority of pet owners believe treating pets as children is more common these days, while many also believe trialling having pets before having children is a good idea and is also more common nowadays.
- Owning pets is also widely seen to be beneficial for children as they grow up, with the most commonly cited benefits being a sense of responsibility, a duty of care and kindness towards others.

Some pet owners care more about their pets than they do about themselves

- Nearly all pet owners feel it is important to keep their pets physically healthy.
- Interestingly, around half feel they are more likely to take their pets to the vet than they are to go to the GP or to put more effort on ensuring their pets stay healthy than on ensuring they stay healthy themselves.
- Some pet owners also feel they are more likely to try alternative medicines or alternative therapies on their pets than on themselves.

Pet owners shell out money for their pets, including for their birthdays and Christmas

- Pet owners spend approximately \$117 on their pets in a month, with the bulk of the expense going to their food.
- Pet owners are also pampering their furry friends, with most having spent or are planning to spend money on toys, pet beds and special/premium food.
- Many pet owners also see their pets' birthdays as being as important as a family member's or a friend's and actually celebrate the occasion, spending an average of \$41, particularly on special treats.
- Most pet owners are also likely to spend on gifts/purchases for their pets this Christmas, planning to spend an average of \$43, particularly on toys.

Are pets the key to a happier and healthier life?

- Nearly all pet owners say owning pets makes them happier on a day-to-day basis, particularly by reducing their stress levels and making them less lonely.
- Furthermore, nearly all pet owners say owning pets is good for their physical or mental health.

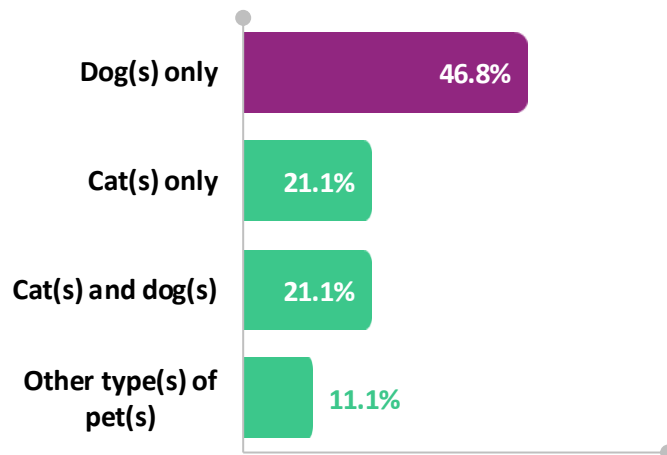
Australia is a pet-friendly nation but could it be more pet-friendly?

- Although many pet owners believe Australia is becoming a more pet-friendly nation, owning a pet could be tricky due to living situation, particularly for renters and those living in apartments.
- Most pet owners think there are enough more pet-friendly public spaces, cafes/restaurants and workplaces across Australia; although many think there should be more.
- Many employed pet owners believe having pets in the workplace reduces stress and improves productivity, but fewer can say that their workplace is pet-friendly.
- Pet owners are unanimous in saying they would avoid travelling with their pets on public transport or planes as much as possible and would only do so if they did not have any other choice, as it is commonly seen as 'too difficult' or 'not safe'.

MAIN FINDINGS

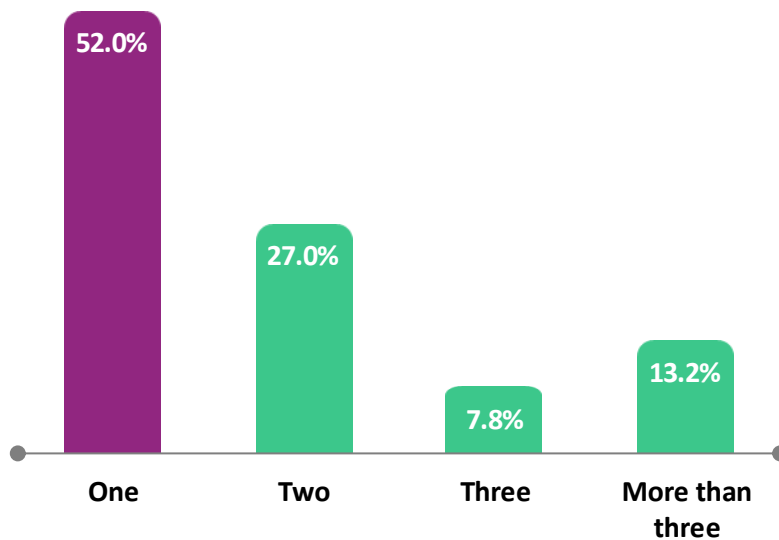
ABOUT YOU

Do you currently own a pet?



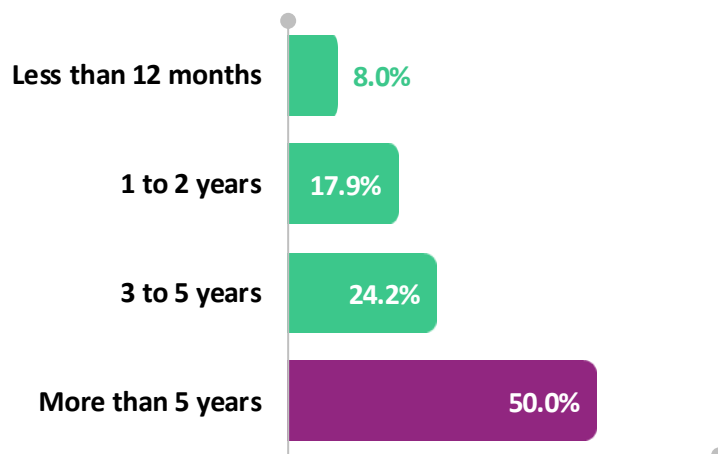
Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you currently own a pet?

How many pets do you currently own?



Source: CoreData - Real Pets Survey (October 2018)
 Question: How many pets do you currently own?

How long have you had your pet/pets?



Source: CoreData - Real Pets Survey (October 2018)

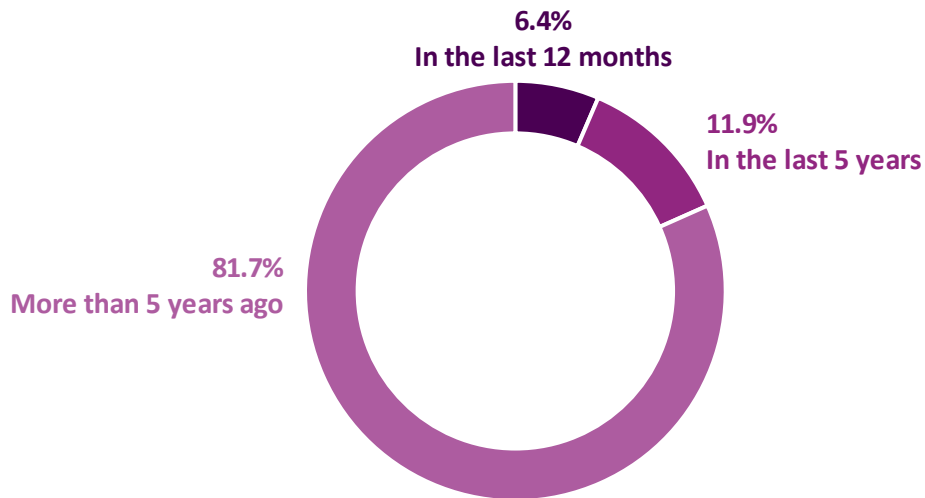
Question: How long have you had your pet/pets?

Close to half (46.8%) of respondents say they currently own only dogs, while similar proportions say they own only cats or both dogs and cats (both 21.1%). One in nine (11.1%) say they own other types of pets that are not dogs or cats.

More than half (52.0%) say they own only one pet, while over a quarter say they have two (27.0%) and more than one in five (21.0%) have three or more pets.

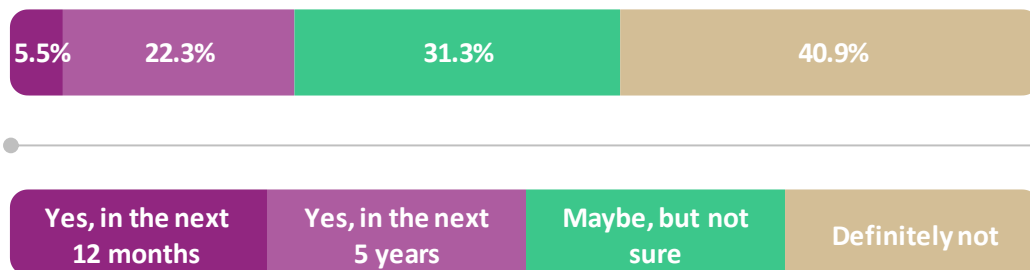
Many respondents say they have had their pets for more than 5 years (50.0%), while close to a quarter (24.2%) have had theirs for 3 to 5 years. One in four (25.9%) respondents have had their pets for less than 12 months to up to 2 years.

When was your child born? / When was your youngest child born?



Source: CoreData - Real Pets Survey (October 2018)
Question: When was your child/youngest child born?

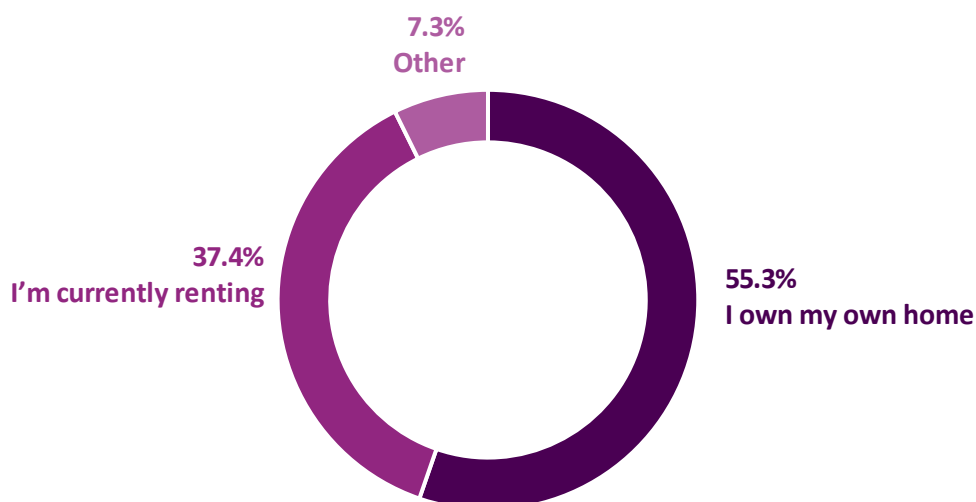
Do you plan on having children?



Source: CoreData - Real Pets Survey (October 2018)
Question: Do you plan on having children?

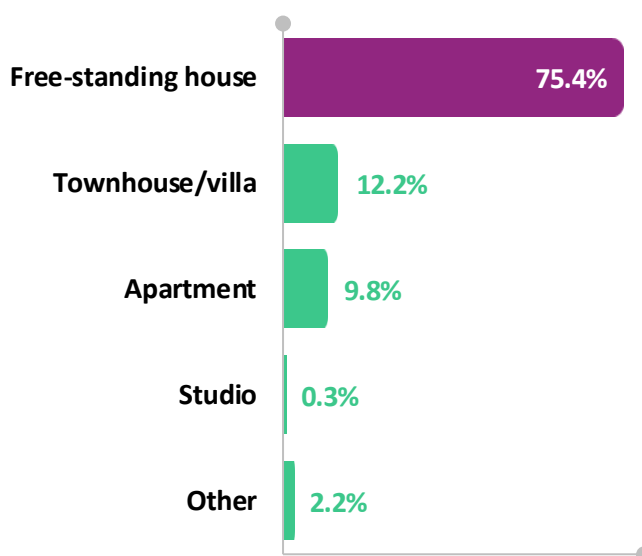
The vast majority (81.7%) of respondents with children say their child or youngest child was born more than 5 years ago. Among respondents without children, close to three in 10 (27.8%) plan on having children and close to a third (31.3%) are unsure. Two in five (40.9%) say they are definitely not planning on having children.

Which of these best describes you?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Which of these best describes you?

Which of these best describes the property type you are currently living in?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Which of these best describes the property type you are currently living in?

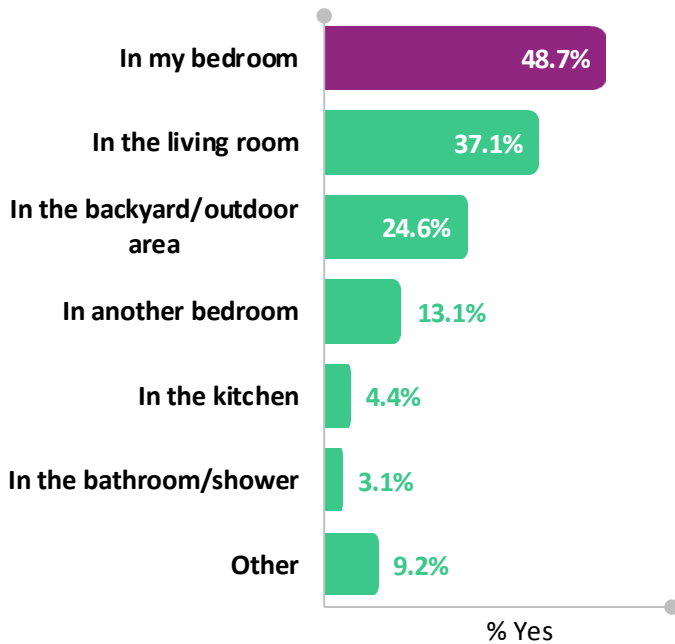
More than half (55.3%) of respondents currently own their own home, while close to two in five (37.4%) are renting. Respondents who are partnered and with or without children are more likely to own their home, while those who are unpartnered are most likely to be renting.

The large majority (75.4%) of respondents currently live in free-standing houses, while one in eight (12.2%) live in townhouses or villas and one in 10 (10.1%) live in apartments or studios.

PETS IN THE HOME

- Many pet owners say their family do activities such as going for walk and watching TV together with their pets and spending an average of 41 hours per week of quality time.
- Some pet owners admit they prefer the company of their pets over their partners or children, feeling more relaxed and getting more love and affection from them.
- Most partnered pet owners say their pets bring their family closer, would consider their pets as part of the family just as much as their partner and/or children and love their pets just as much as they love their family.
- Among those unpartnered, some say owning their pets substitute in some way for having a partner and attributing this to pets being less stressful and more loyal, while the vast majority would consider it to be a deal breaker if a potential future partner did not like or want their pets.

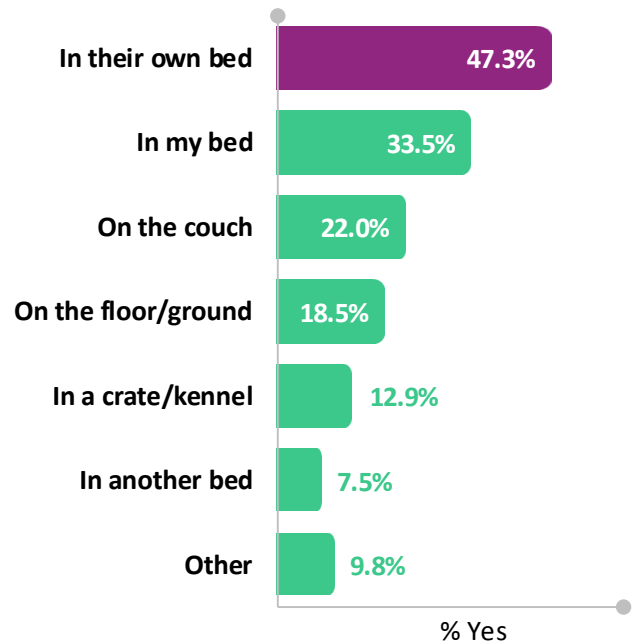
In which part of the home pet/pets typically sleep?
Where do your pet/pets typically sleep?



*Multiple answers allowed

Source: CoreData - Real Pets Survey (October 2018)

Question: In which part of the home pet/pets typically sleep?



*Multiple answers allowed

Source: CoreData - Real Pets Survey (October 2018)

Question: Where does (do) your pet (s) typically sleep?

Close to half (48.7%) of respondents say their pets typically sleep in their bedroom, while almost two in five (37.1%) point to the living room area. Close to a quarter (24.6%) say their pets typically sleep in the backyard or outdoor area of their home and one in seven (13.1%) say they sleep in another bedroom.

Respondents without partners and children are the most likely to say their pets sleep in their bedroom, while those with partners and children are the least likely to say so (55.8% and 38.3% respectively). Respondents who have both cats and dogs are the most likely to say their pets typically sleep in their bedroom (59.7%) or in the backyard/outdoor area (35.6%).

Close to half (47.3%) of respondents say their pets typically sleep in their own bed, while a third (33.5%) say their pets sleep with them in their bed. Some respondents also say their pets typically sleep on the couch (22.0%), on the floor or ground (18.5%) and in a crate or kennel (12.9%).

Respondents who only own cats are the most likely to say their pets typically sleep with them on their bed (44.4%) or on the couch (39.1%), while respondents who have both cats and dogs are the most likely to say their pets typically sleep on their own bed (57.6%).

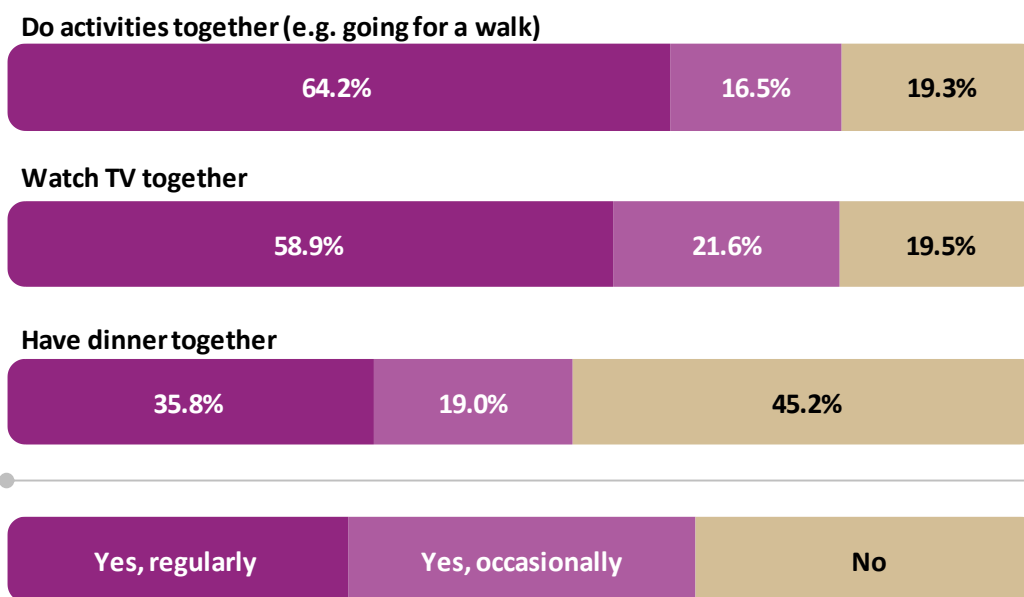
How much quality time do you spend with your pet/pets per week?



Source: CoreData - Real Pets Survey (October 2018)
 Question: How much quality time do you spend with your pet/pets per week?

Respondents spend on average 41 hours per week of quality time with their pets. Those who have dogs only spend the most quality time with their pets compared to those with cats only (47 hours and 33 hours per week respectively).

Do you and your family do the following with your pet/pets?

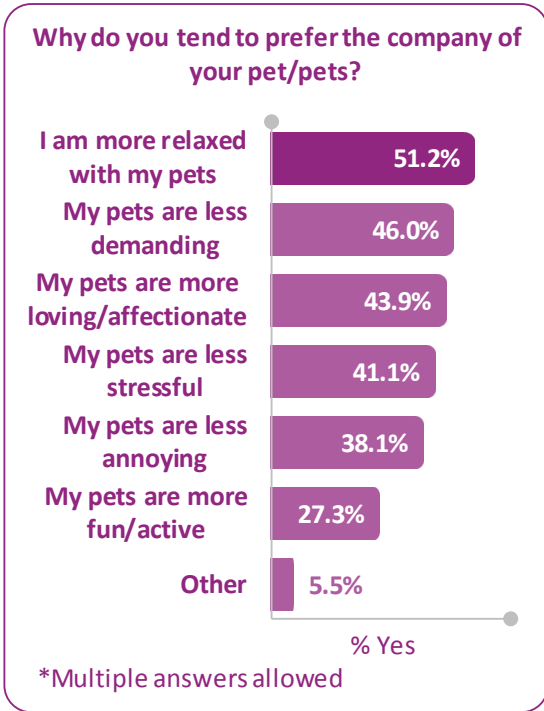
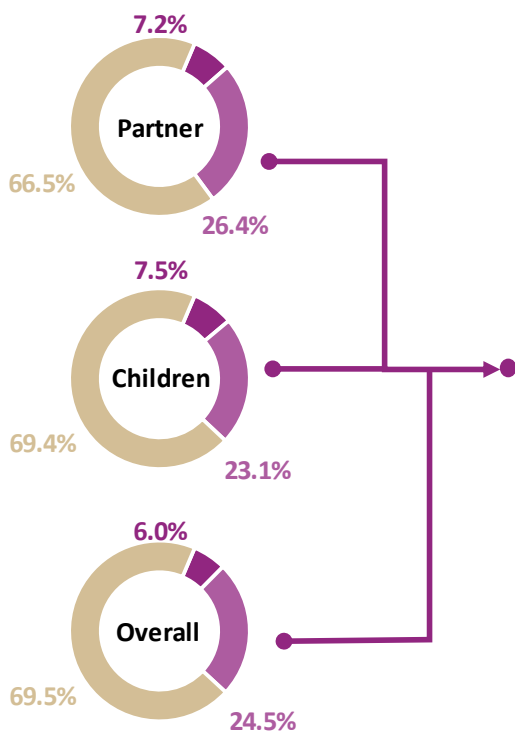


Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you and your family do the following with your pet/pets?

The vast majority of respondents say they and their family do activities such as going for a walk (80.7%) and watch TV together (80.5%) with their pets. To a lesser extent, respondents also have dinner together with their pets (54.8%). Respondents with both cats and dogs are the most likely to have done the above activities together with their pets, while those with cats only are the least likely to say so.

Do you tend to prefer the company of your pet/pets over the company of your partner?
 Do you tend to prefer the company of your pet/pets over the company of your child/children?
 Why do you tend to prefer the company of your pet/pets?

Do you tend to prefer the company of your pet/pets over the company of your partner/children?



Yes, to large extent **Yes, to some extent** **No, not really**

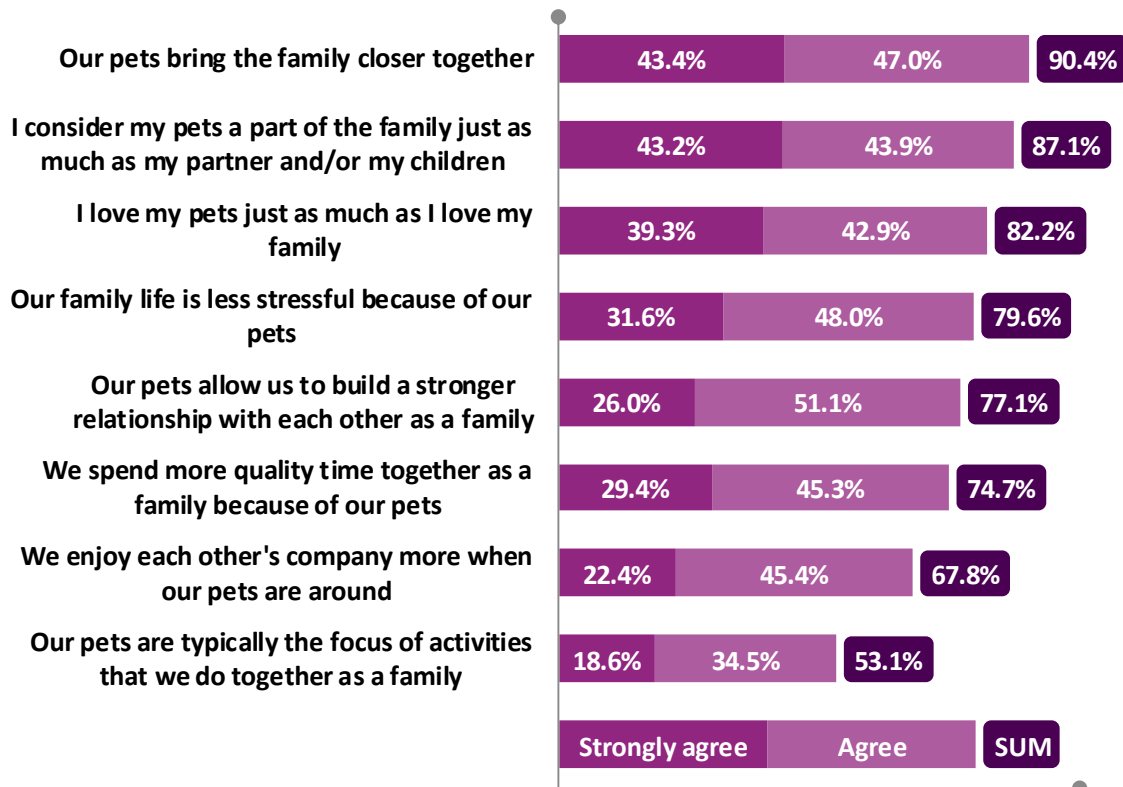
Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you tend to prefer the company of your pet/pets over the company of your partner?
 Do you tend to prefer the company of your pet/pets over the company of your child/children?
 Why do you tend to prefer the company of your pet/pets?

Three in 10 (30.5%) respondents with either partners or children or both say they tend to prefer the company of their pets over the company of their partners/children, while the remaining portion say otherwise (69.5%).

Respondents with both cats and dogs are the most likely to prefer the company of their pets, while respondents with cats only are the least likely to do so (41.3% and 18.7% respectively).

Among respondents who tend to prefer the company of their pets, more than half (51.2%) say they feel more relaxed with their pets. Similar proportions say their pets are less demanding (46.0%), more loving or affectionate (43.9%) and less stressful (41.1%) compared to their partners/children. They also say their pets are less annoying (38.1%) and more fun or active (27.3%).

How much do you agree with the following statements about the impact of owning pet/pets on your relationship with your family?



Source: CoreData - Real Pets Survey (October 2018)

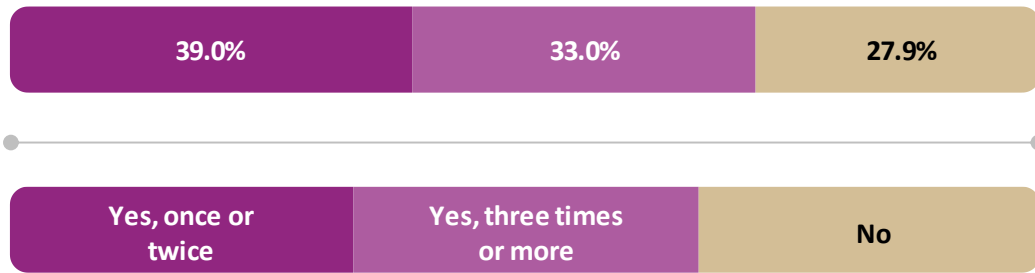
Question: How much do you agree with the following statements about the impact of owning pet/pets on your relationship with your family?

Nearly all respondents either living with a partner or married say their pets bring their family closer (90.4%). The vast majority also say they consider their pets as part of the family just as much as their partner and/or children (87.1%) and love their pets just as much as they love their family (82.2%).

Similar proportions declare their family life is less stressful because of their pets (79.6%), that their pets allow them to build a stronger relationship as a family (77.1%) and they spend more quality time together as family due to their pets (74.7%).

To a lesser extent, respondents also say their family enjoys the company of one another more because of their pets (67.8%) and their pets are typically the focus of activities they do together as a family (53.1%).

Have you taken a family photo which includes your pet/pets?

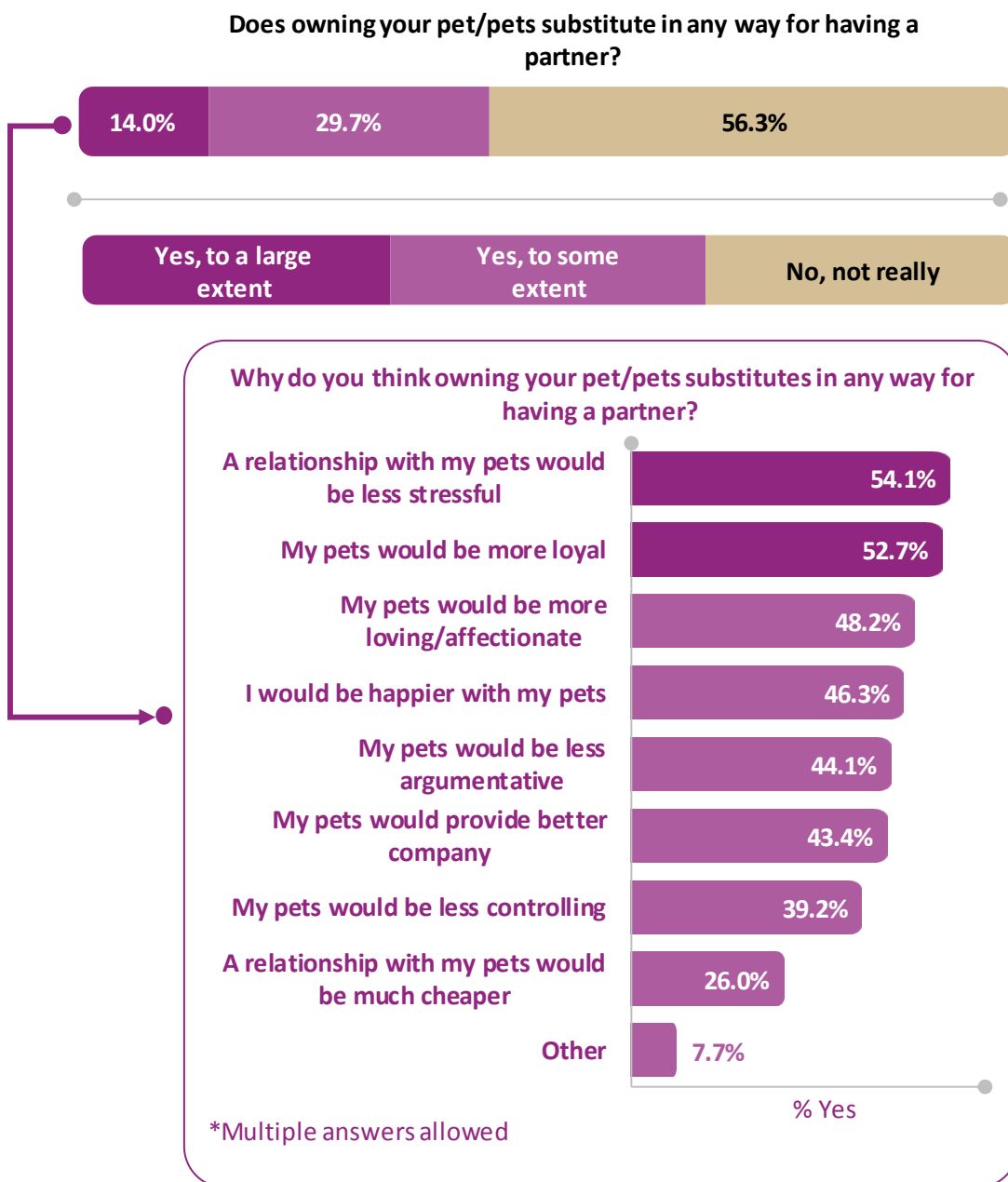


Source: CoreData - Real Pets Survey (October 2018)

Question: Have you taken a family photo which includes your pet/pets?

The large majority (72.0%) of respondents have taken a family photo including their pets, with a third (33.0%) saying they have done a family photo with the pets three times or more.

Does owning your pet/pets substitute in any way for having a partner?
 Why do you think owning your pet/pets substitutes in any way for having a partner?



Source: CoreData - Real Pets Survey (October 2018)

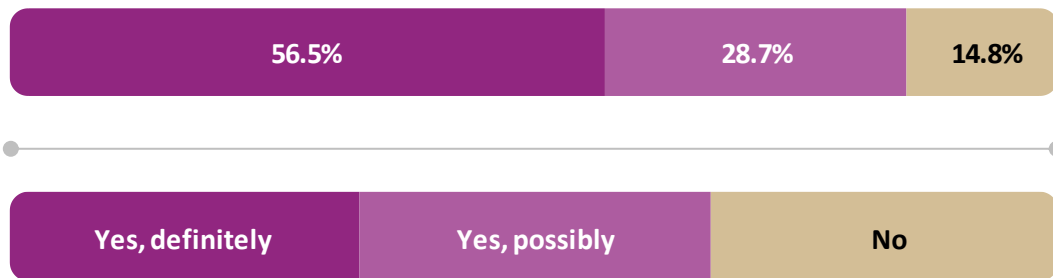
Question: Does owning your pet/pets substitute in any way for having a partner?

Why do you think owning your pet/pets substitutes in any way for having a partner?

Among respondents who are single or unpartnered, more than two in five (43.7%) say owning their pets substitute in some way for having a partner. This is consistent with results from a previous study conducted in 2016 wherein 43.5% shared the same sentiment.

More than half attribute this to a less stressful relationship with their pets (54.1%) and that their pets are more loyal (52.7%), while close to half say their pets are more loving or affectionate (48.2%) and that they are happier with their pets (46.3%). More than a quarter (26.0%) feel a relationship with their pets is much cheaper than having a partner.

Would you consider it to be a deal breaker if a potential future partner didn't like/want your pet/pets?



Source: CoreData - Real Pets Survey (October 2018)

Question: Would you consider it to be a deal breaker if a potential future partner didn't like/want your pet/pets?

Among respondents who are single or unpartnered, the vast majority (85.2%) would consider it to be a deal breaker if a potential future partner did not like or want their pets, with close to three-fifths (56.5%) saying this is definitely a deal breaker.

KIDS AND PETS

- Treating pets as children is more common these days according to the vast majority of pet owners, while many also believe trialling having pets before having children is a good idea and is also more common nowadays.
- The majority consider their pets as one of their children although this proportion increases considerably when asked if they have friends and relatives who consider their pets as one of their children.
- For pet owners who have never had children, owning their pets substitute in some way for having children and to a lesser degree they are trialling having pets before having children.
- Nearly all pet owners have never had children but are planning to have them at some point say they are planning to have their children grow up with their pets.
- Among those who have had children in the last 5 years, many have gotten pets so that their children can grow up with them and their interaction with one another have been mostly comfortable and playful.
- According to most pet owners, the main benefits children can learn from growing up with pets include: a sense of responsibility, a duty of care and kindness towards others among other things.

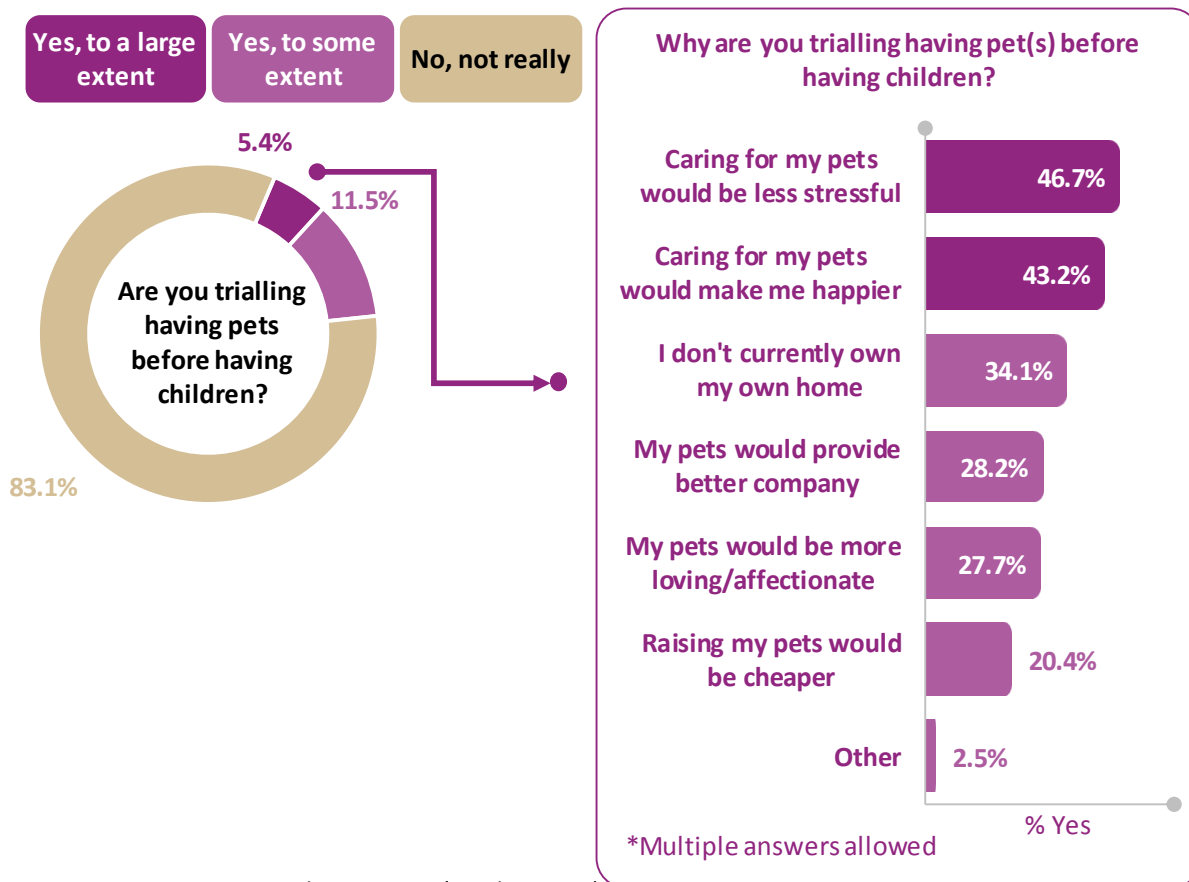
Does owning your pet/pets substitute in any way for having children?



Source: CoreData - Real Pets Survey (October 2018)

Question: Does owning your pet/pets substitute in any way for having children?

Are you trialling having pets before having children?
 Why are you trialling having pets before having children?

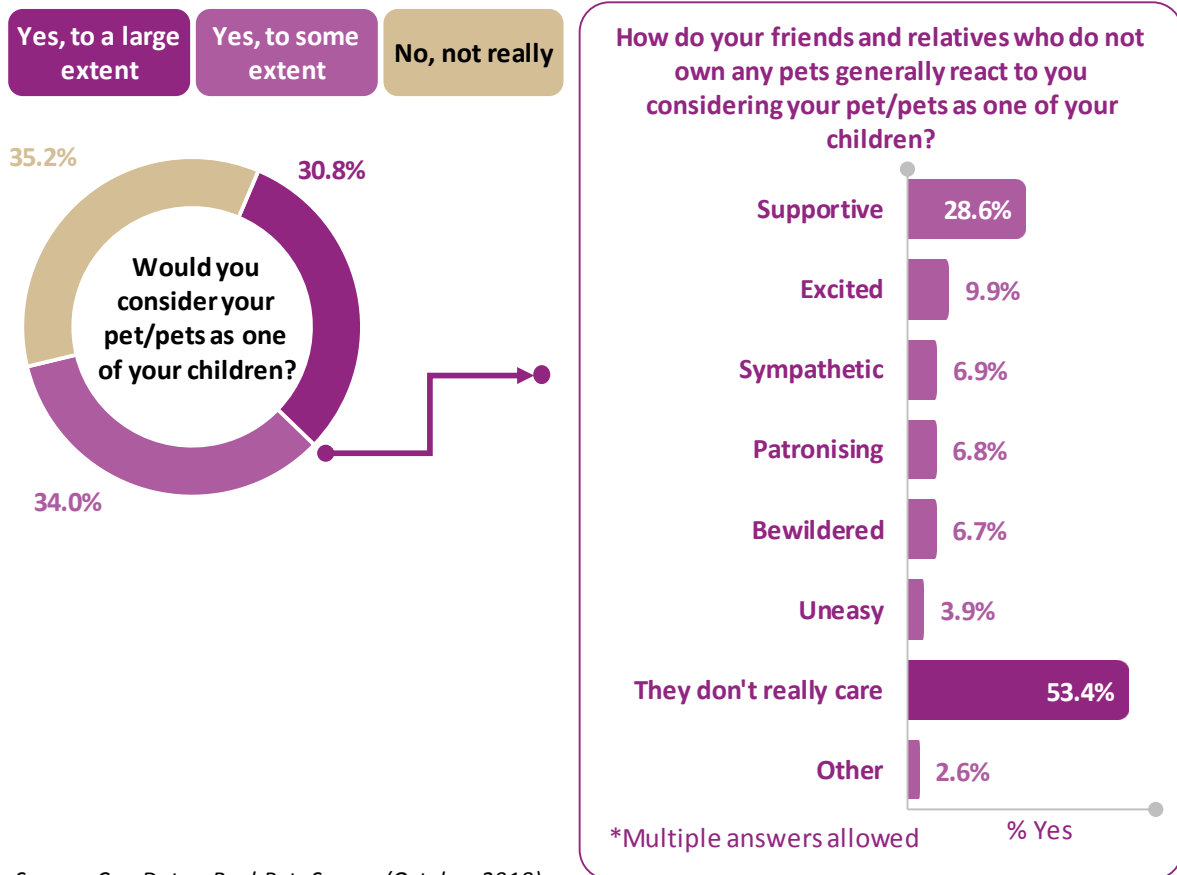


Source: CoreData - Real Pets Survey (October 2018)
 Question: Are you trialling having pets before having children?
 Why are you trialling having pets before having children?

Among respondents who have never had children, close to half (46.6%) say owning their pets substitute in some way for having children. This is consistent with results from a previous study conducted in 2016 wherein 43.9% shared the same sentiment.

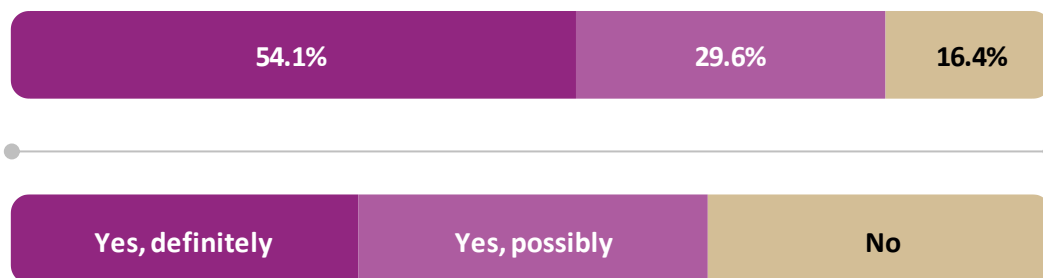
However, only one in six (16.9%) say they are trialling having pets before having children. Top reasons for trialling having pets before having children include caring for their pets would be less stressful (46.7%) and would make them happier (43.2%). Other reasons also include not currently owning their own home (34.1%) and raising pets would be cheaper (20.4%).

Would you consider your pet/pets as one of your children?
 How do your friends and relatives who do not own any pets generally react to you considering your pet/pets as one of your children?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Would you consider your pet/pets as one of your children?
 How do your friends and relatives who do not own any pets generally react to you considering your pet/pets as one of your children?

Do you have any friends and relatives who consider their pet/pets as one of their children?



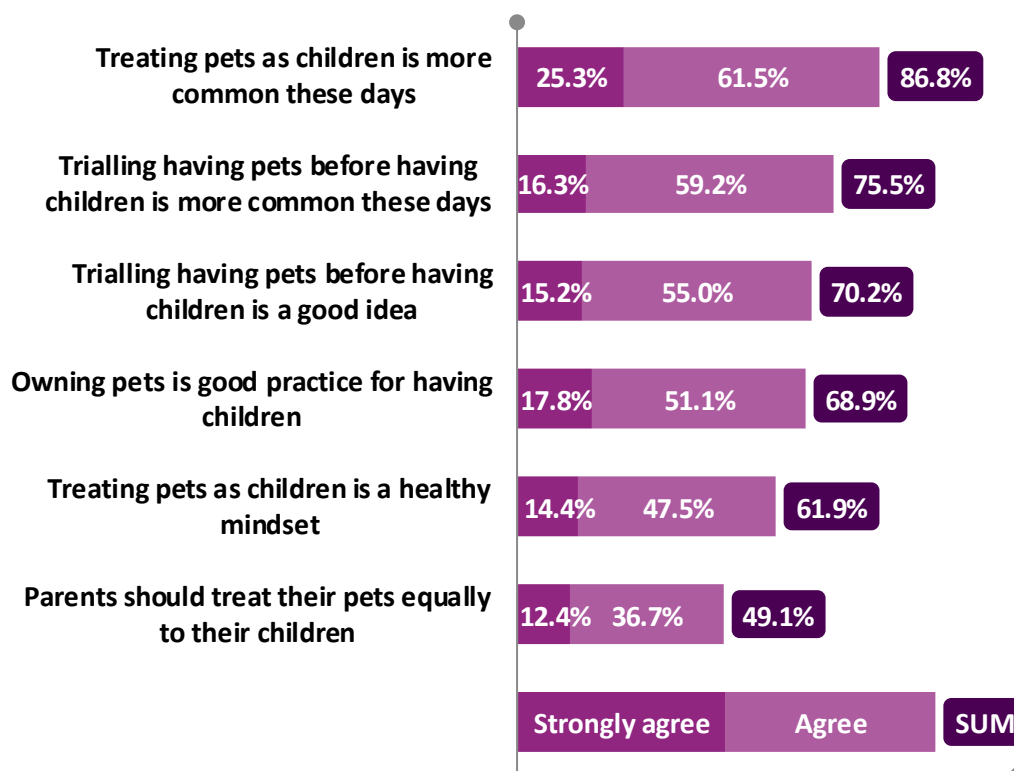
Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you have any friends and relatives who consider their pet/pets as one of their children?

Close to two-thirds (64.8%) say they consider their pets as one of their children. Although most friends and relatives who do not own any pets do not really care if they consider their pets as

children, almost three in 10 (28.6%) believe their friends and relatives are supportive while less than one in 10 (9.9%) say they are excited. Few feel their friends and relatives are patronising and bewildered.

Interestingly, the vast majority (83.7%) of respondents say they have friends and relatives who consider their pets as one of their children, with more than half (54.1%) saying they definitely have friends and relatives who do this.

How much do you agree with the following statements about pet/pets and children?

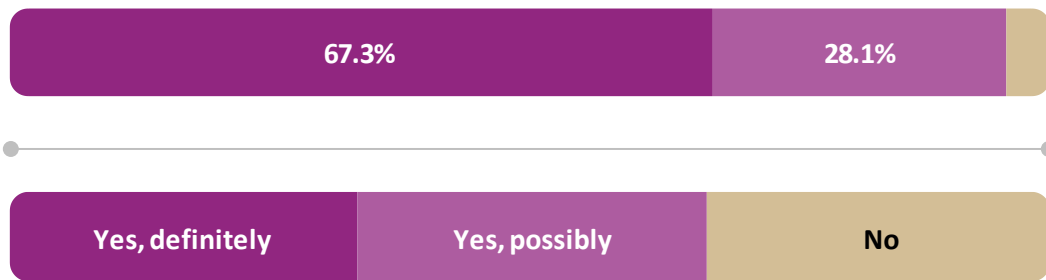


Source: CoreData - Real Pets Survey (October 2018)
 Question: How much do you agree with the following statements about pet/pets and children?

The vast majority (86.8%) of respondents believe treating pets as children is more common these days, while similar proportions think trialling having pets before having children is more common these days (75.5%) and is a good idea (70.2%).

They also say owning pets is good practice for having children (68.9%) and treating pets as children is a healthy mindset. Close to half (49.1%) believe parents should treat pets equally to their children.

Looking ahead to when you have children, are you planning to have them grow up with your pet/pets?

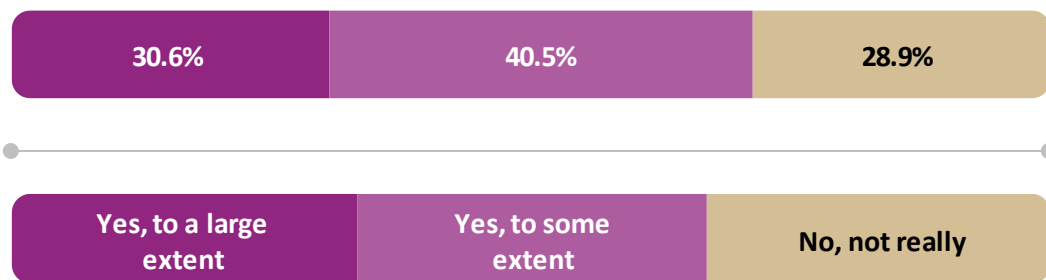


Source: CoreData - Real Pets Survey (October 2018)

Question: Looking ahead to when you have children, are you planning to have them grow up with your pet/pets?

Among respondents who have never had children but are planning to have them at some point, nearly all (95.4%) say they are planning to have their children grow up with their pets.

Did you get a pet/pets so that your child/children can grow up with your pet/pets?



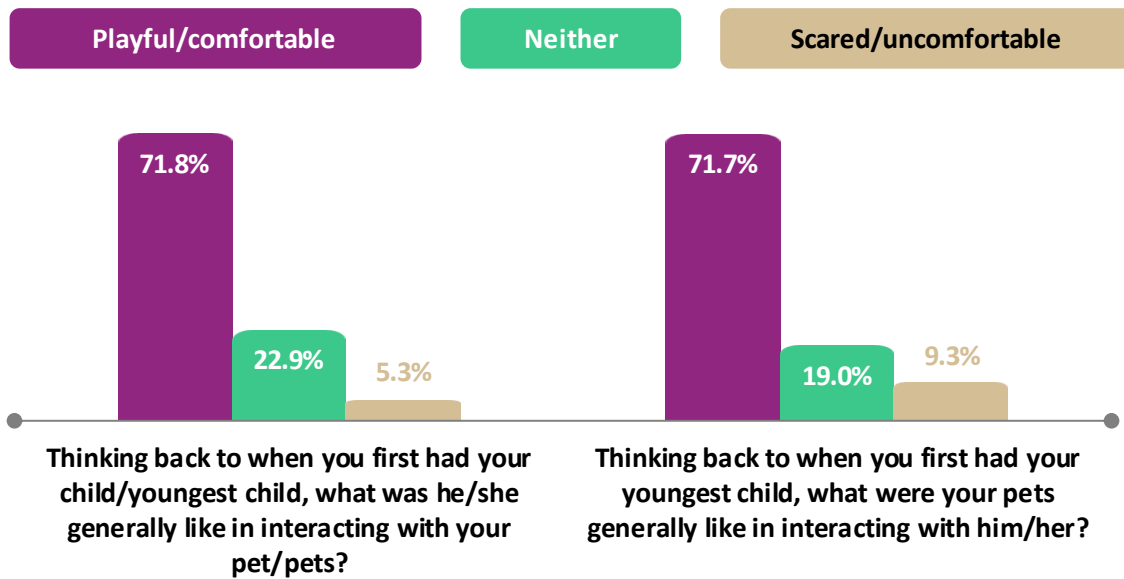
Source: CoreData - Real Pets Survey (October 2018)

Question: Did you get a pet/pets so that your child/children can grow up with your pet/pets?

Among respondents who have had children in the last 12 months or last 5 years, more than seven in 10 (71.1%) say they got pets so that their children can grow up with them.

Thinking back to when you first had your child/youngest child, what was he/she generally like in interacting with your pet/pets?

Thinking back to when you first had your child/youngest child, what (was/were) your pet/pets generally like in interacting with him/her?



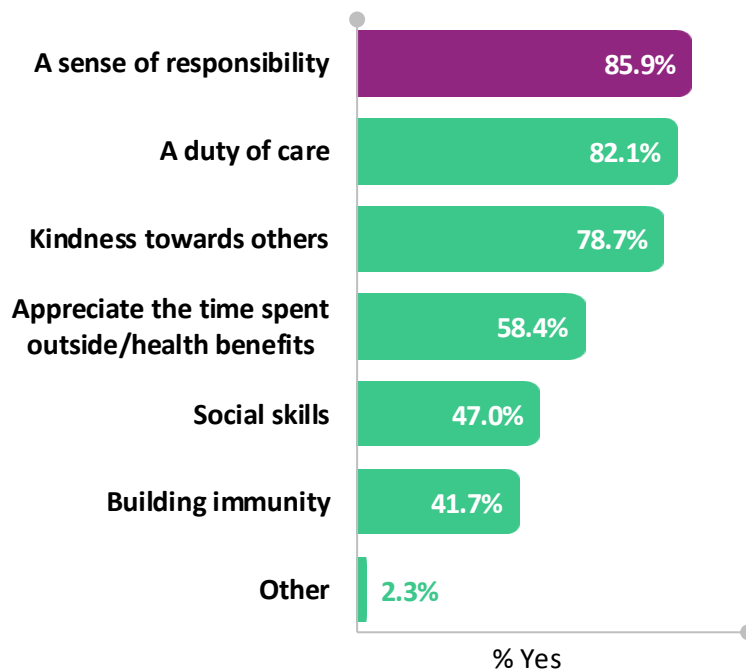
Source: CoreData - Real Pets Survey (October 2018)

Question: Thinking back to when you first had your child/youngest child, what was he/she generally like in interacting with your pet/pets?

Thinking back to when you first had your youngest child, what were your pets generally like in interacting with him/her?

Among respondents who have had children in the last 12 months or last 5 years, more than seven in 10 (71.8%) say their children were generally playful or comfortable in interacting with their pets, while a similar proportion say their pets were also generally playful or comfortable in interacting with their children (71.7%).

Generally speaking, what do you think are the main benefits that children can learn from growing up with pets?



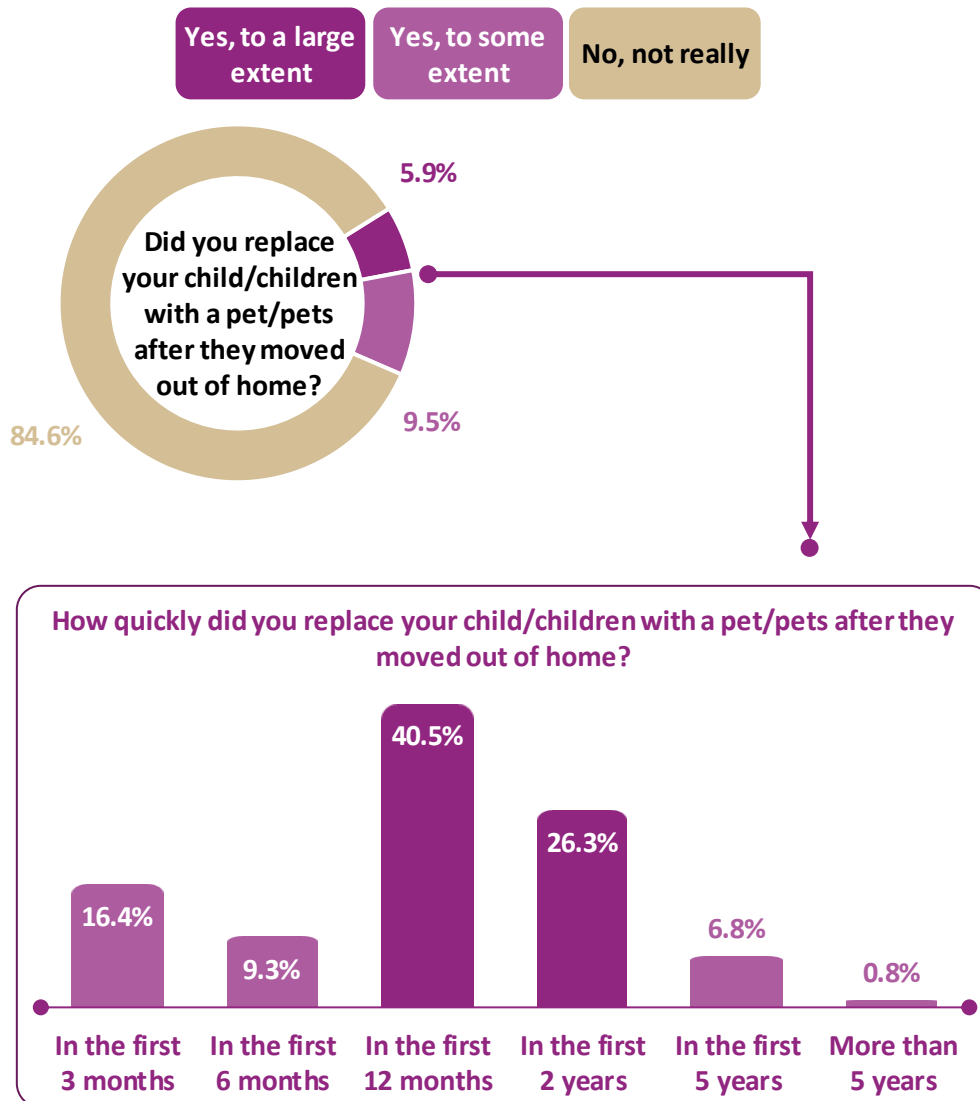
*Multiple answers allowed

Source: CoreData - Real Pets Survey (October 2018)

Question: Generally speaking, what do you think are the main benefits that children can learn from growing up with pets?

The vast majority of respondents think the main benefits that children can learn from growing up with pets are a sense of responsibility (85.9%), a duty of care (82.1%) and kindness towards others (78.7%). They also believe appreciation for the time spend outside or health benefits (58.4%), social skills (47.0%) and immunity-building (41.7%) are other things children can learn from growing up with pets.

Did you replace your child/children with a pet/pets after they moved out of home?
 How quickly did you replace your child/children with a pet/pets after they moved out of home?



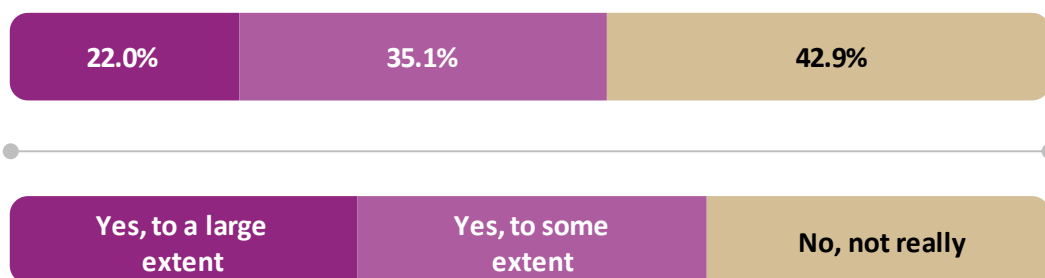
Source: CoreData - Real Pets Survey (October 2018)
 Question: Did you replace your child/children with a pet/pets after they moved out of home?
 How quickly did you replace your child/children with a pet/pets after they moved out of home?

Although the vast majority of respondents whose children have all left home say they did not replace their children with pets after they have moved out of home, close to one in six (15.4%) say they did. Among those who say they replaced their children with pets, two-thirds (66.2%) say they did in the first 12 months after their children moved out.

ABOUT YOUR PETS

- The number of pet owners who have pet insurance has increased from a previous study, citing coverage of unexpected vet costs and peace of mind as primary reasons for getting insurance.
- The vast majority of pet owners have vaccinated and de-sexed their pets, while of those who have not, many are planning to do the same.
- Pet owners are more likely to put more effort on ensuring their pets stay healthy than on themselves and to take their pets to the vet than they are to go to the GP.

Did you get additional pet/pets to keep your first one happy by giving it some company?

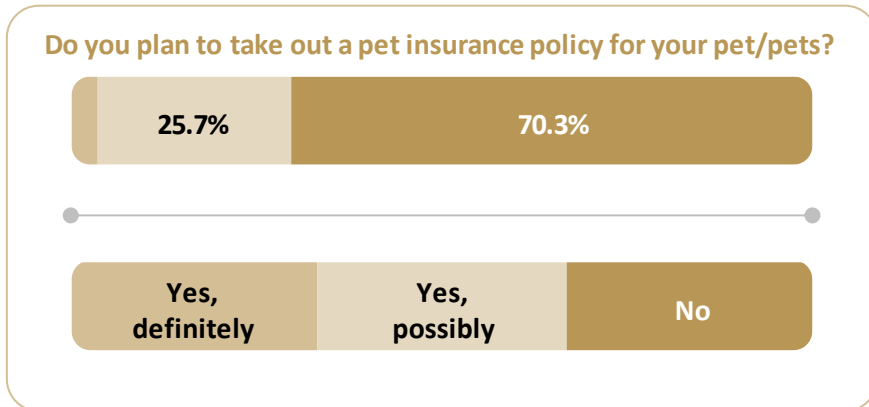
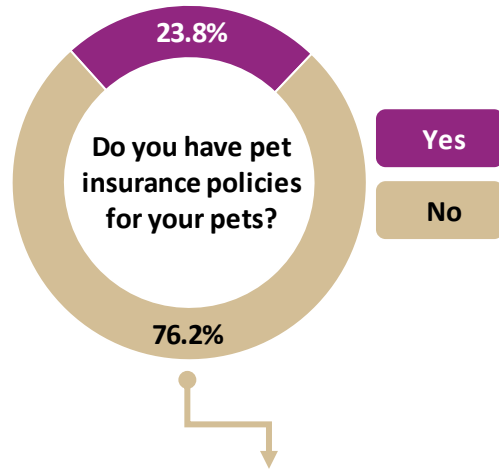


Source: CoreData - Real Pets Survey (October 2018)

Question: Did you get additional pet/pets to keep your first one happy by giving it some company?

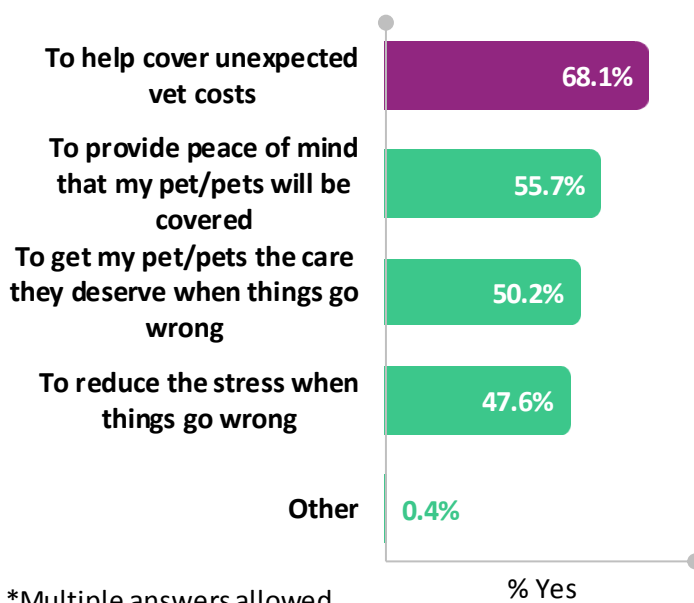
Among respondents who have more than one pet, close to three in five (57.1%) say they got additional pet/s to keep their first one happy by giving them some company.

Do you have a pet insurance policy/policies for your pet/s?
 Do you plan to take out a pet insurance policy for your pet/pets?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you have pet insurance policies for your pets?
 Do you plan to take out a pet insurance policy for your pet/pets?

Why do you have/plan to have a pet insurance policy for your pet/pets?



Source: CoreData - Real Pets Survey (October 2018)

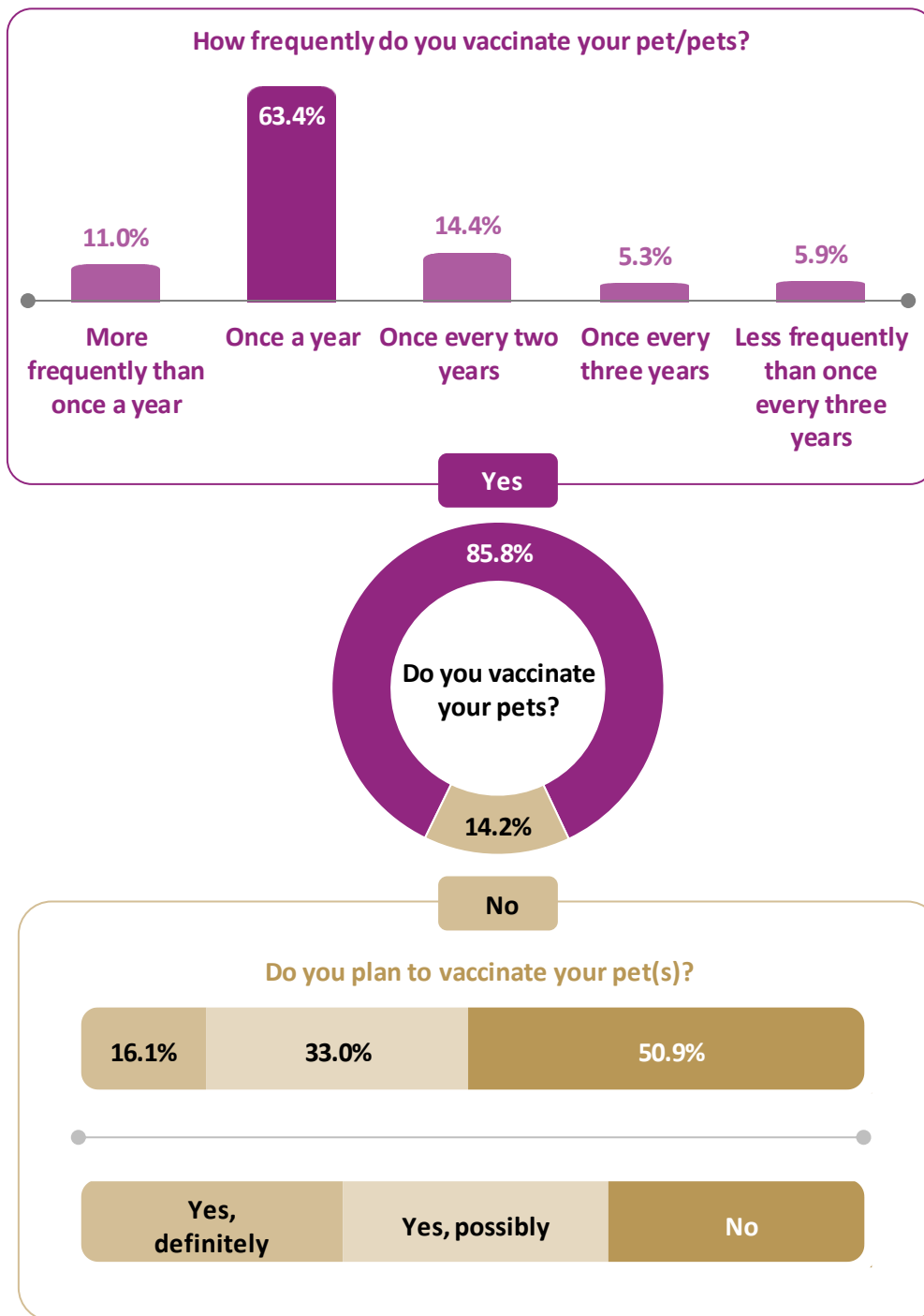
Question: Why do you have/plan to have a pet insurance policy for your pet (s)?

Close to a quarter (23.8%) of respondents say they have pet insurance policies for their pets. This has increased from 14.7% in a study conducted last year.

Among those who have more than one pet and do not have pet insurance for all of them, close to three in 10 (29.7%) plan to take out additional policies for them.

For respondents who have pet insurance or planning to take out one, they say this is to help cover unexpected vet costs (68.1%) and to provide peace of mind that their pets will be covered (55.7%). Other reasons for respondents getting or planning to get pet insurance are to get their pets the care they deserve when things go wrong (50.2%) and to reduce the stress when things go wrong (47.6%).

Do you vaccinate your pet/s?
 Do you plan to vaccinate your pet(s)?
 How frequently do you vaccinate your pet/pets?

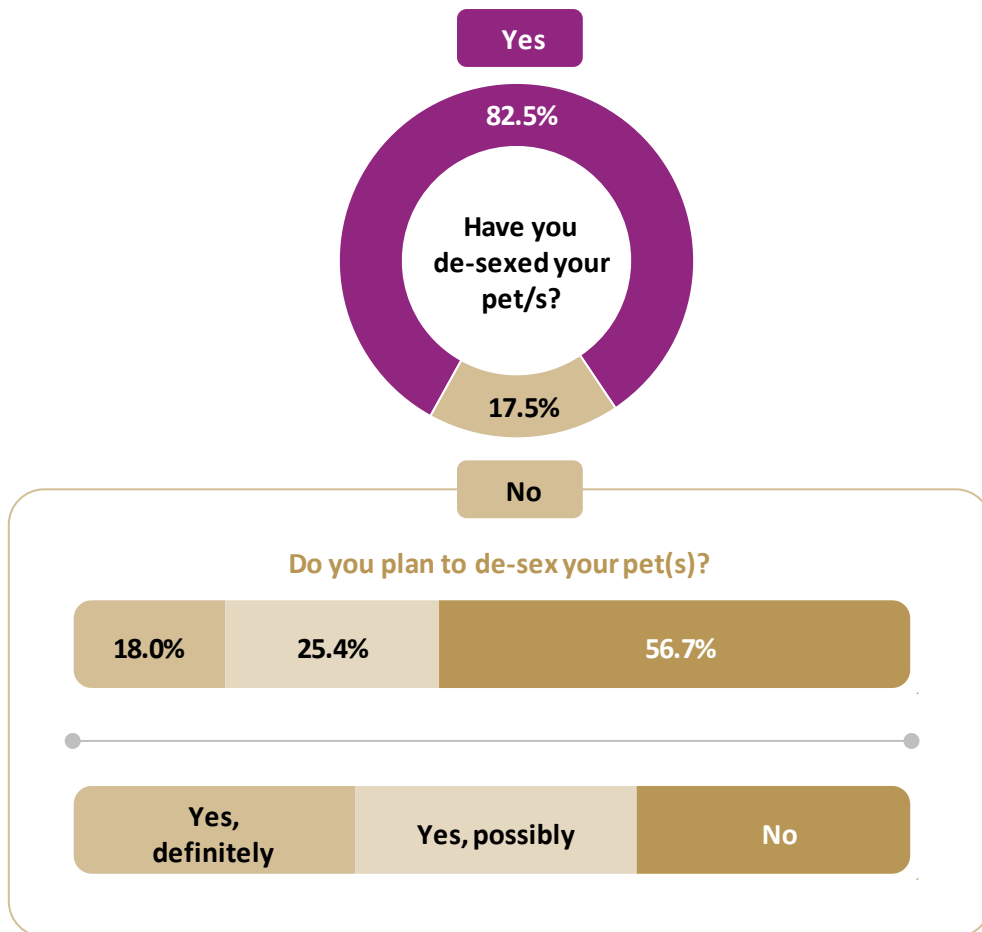


Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you vaccinate your pets?
 Do you plan to vaccinate your pet(s)?
 How frequently do you vaccinate your pet/pets?

The vast majority (85.8%) of respondents vaccinate their pets. Among those who have more than one pet and have not had all of them vaccinated, close to half (49.1%) plan to vaccinate them.

Among those who vaccinate their pets, close to two-thirds (63.4%) do it once a year while one in nine (11.0%) do so more frequently than once a year.

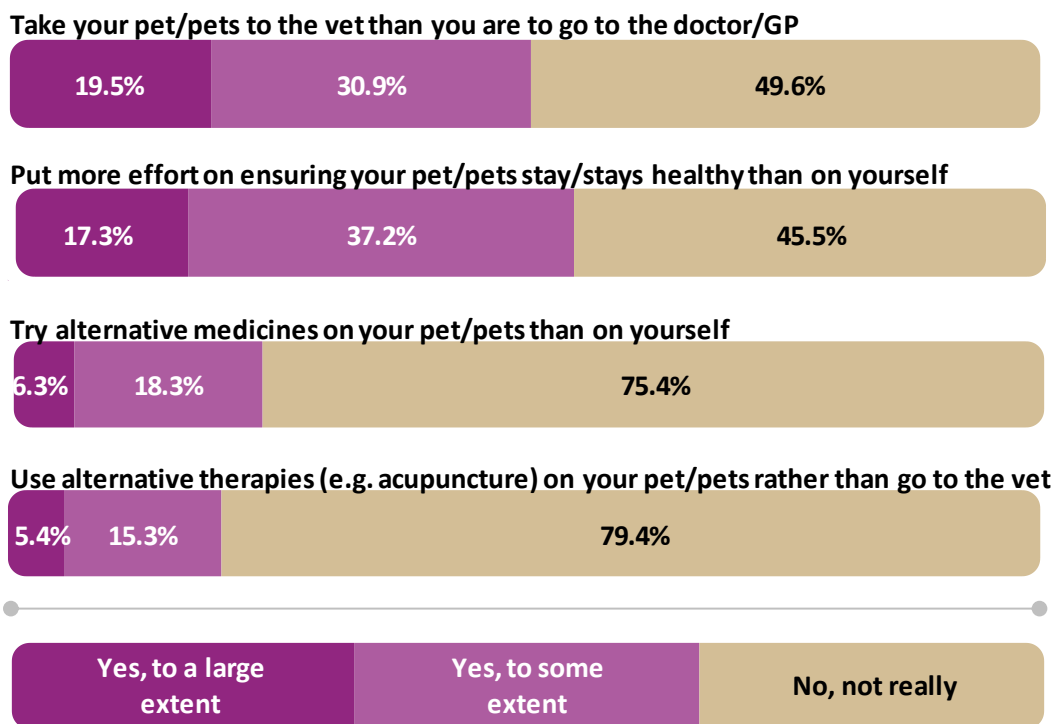
Have you de-sexed your pet(s)?
Do you plan to de-sex your pet(s)?



Source: CoreData - Real Pets Survey (October 2018)
Question: Have you de-sexed your pet(s)?
Do you plan to de-sex your pet(s)?

The vast majority (82.5%) of respondents say they have de-sexed their pets. Among those who have more than one pet and have not had all of them de-sexed, more than two in five (43.4%) plan to de-sex them.

Do you feel you are more likely to ...?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you feel you are more likely to ...?

Similar proportions of respondents feel they are more likely to put more effort on ensuring their pets stay healthy than on themselves (54.5%) and to take their pets to the vet than they are to go to the GP (50.4%).

This has decreased considerably when asked regarding alternative medicines/therapies, with close to a quarter (24.6%) say they are more likely to try alternative medicines on their pets than on themselves and one in five (20.7%) more likely to use alternative therapies on their pets than go to the vet.

PET FOOD

- Although fewer pet owners believe that the food their pets eat reflect their own diet, most typically feed their pets non-organic and dry food as well as fresh or home-made and non-vet endorsed food.
- For pet owners whose pets are currently on a raw food diet, their owners have done this mainly to improve their pets' overall health and wellbeing.

Does the food your pet eats/pets eat reflect the food you eat (i.e. your diet)?



Source: CoreData - Real Pets Survey (October 2018)

Question: Does the food your pet eats/pets eat reflect the food you eat (i.e. your diet)?

Please explain how the food your pet/pets eat(s) reflect the food you eat.

Close to three in 10 (29.9%) respondents say the food their pets eat reflect the food they (the owners) eat.

"I buy good quality food for the cat and the dog, and I think this is reflected in their health. I believe you are what you eat and the same applies for animals. I don't feed them human food or sweets or anything like that, and give them a variety of fresh and canned food and different flavours and textures as I like different foods myself." (Female, 61 years old, NSW)

"I'm vegan, so I care about animals and my own long-term health. I feed my dog high quality dog food since he's a large breed so his joints are good, his skin, eyes, fur are all in good nick and I keep his vet bills down by looking after him. I feed him well, give him an hour of solid exercise at least every day. I try to do the same for myself." (Female, 38 years old, NSW)

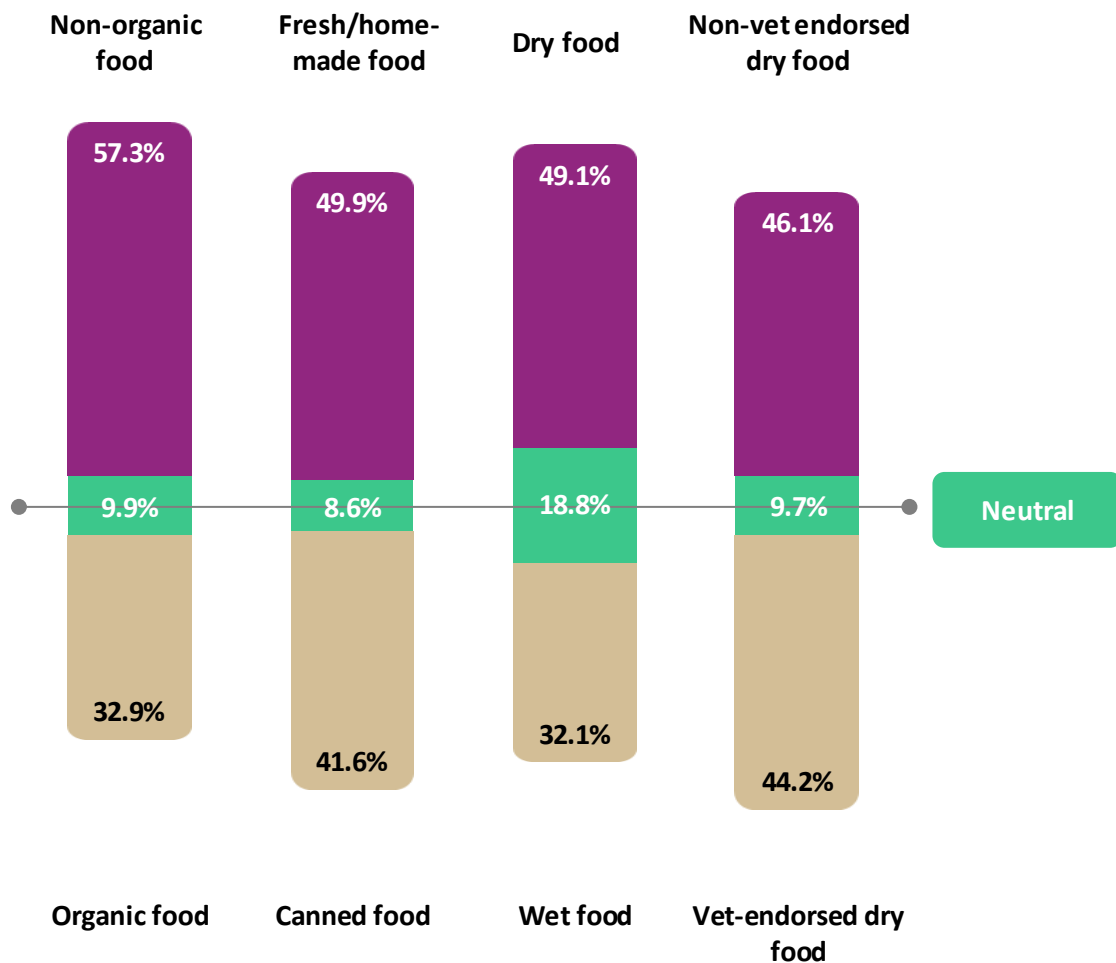
"I eat healthily and so does my dog. No sweets, well balanced nutrition, and even the 'treats' are healthy (e.g. dental chews)." (Female, 65 years old, QLD)

"I buy them a premium pet food, and lots of healthy (breed appropriate) snacks and treats. I try to avoid buying them the pet equivalents of junk food." (Female, 48 years old, NSW)

"Lean proteins, and good carbs with vegetables. Mainly what I try to eat as well." (Female, 27 years old, VIC)

"Most of my pets are farm animals and eat greens, fruit and veggies like we do." (Female, 58 years old, SA)

Which of the following best describes the type of food your pet/pets typically eats/eat?



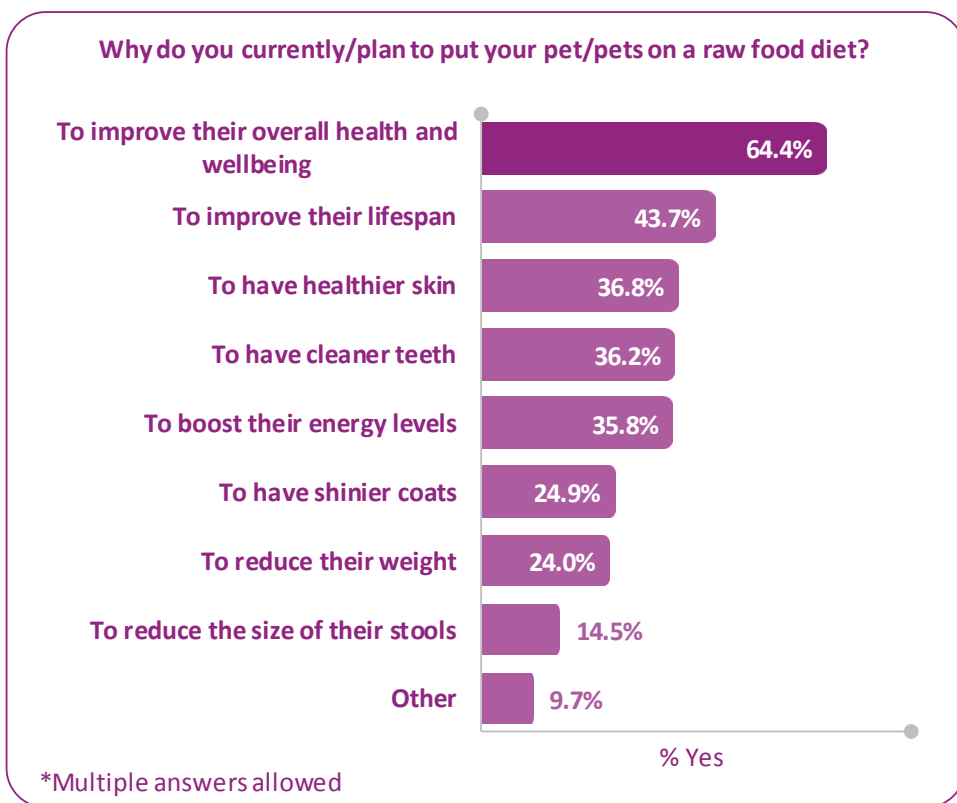
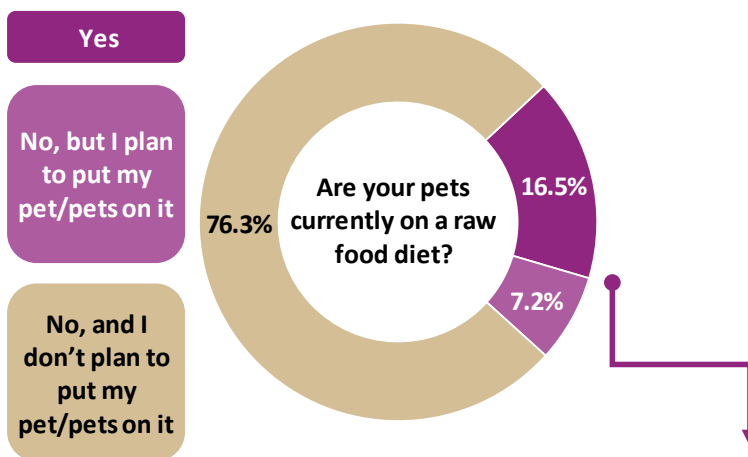
Source: CoreData - Real Pets Survey (October 2018)

Question: Which of the following best describes the type of food your pet/pets typically eats/eat?

When asked to describe the type of food their pets typically eat, almost three in five (57.3%) respondents say their pets eat non-organic food compared to only close to a third (32.9%) who say organic food. Nearly half (49.1%) say their pets typically eat dry food compared to those who say their pets eat wet food (32.1%).

Close to half (49.9%) say their pets eat fresh or home-made food as opposed to 41.6% who say their pets eat canned food, while similar proportions say their pets typically eat non-vet endorsed (46.1%) or vet-endorsed dry food (44.2%).

Is/Are your pet/pets currently on a raw food diet?
 Why do you currently/plan to put your pet/pets on a raw food diet?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Are your pets currently on a raw food diet?
 Why do you currently/plan to put your pet/pets on a raw food diet?

Close to a quarter (23.7%) of respondents say their pets are currently on a raw food diet or plan to put them on it, to mainly improve their overall health and wellbeing (64.4%). Other reasons for putting their pets on a raw food diet include improving their pets' lifespan (43.7%) and having healthier skin (36.8%) and cleaner teeth (36.2%) for their pets. Some do this or plan to do this for their pets to lose weight (24.0%).

PETS AND TECHNOLOGY

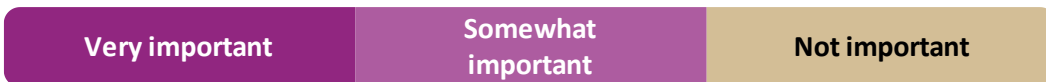
- Nearly all pet owners feel it is important to keep their pets physically healthy and to know the whereabouts of their pets at all times, only a few use webcams or other devices and wearable devices such as activity and location trackers to monitor their pets' activities.
- Most popular apps pet owners use for their pets are mainly for taking or editing or saving photos of their pets as well as for getting health and safety tips and tricks.
- Animal care or welfare and veterinary websites are sites pet owners primarily visit for information on their pets.
- Regardless of whether they post on social media or not, most pet owners take photos of their pets, averaging 13 photos per month and saving around 146 photos on their phone.
- A good number of pet owners also say that they take more photos of their pets and post more of these photos to social media compared to family photos.

How important is it to ...?

Keep your pet/pets physically healthy



Know the whereabouts of your pet/pets at all times

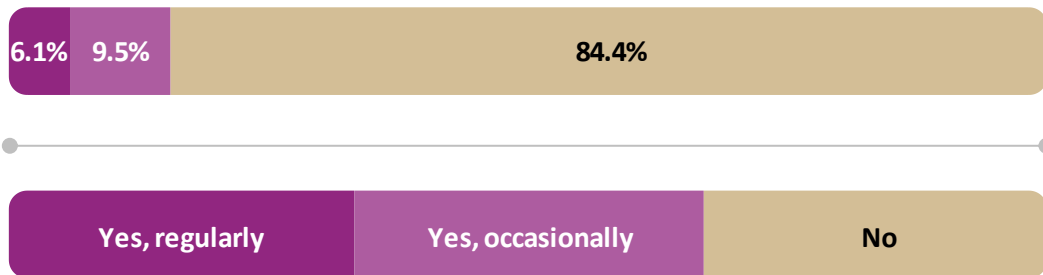


Source: CoreData - Real Pets Survey (October 2018)

Question: How important is it to ...?

Almost all respondents feel it is important to keep their pets physically healthy (98.9%) and to know the whereabouts of their pets at all times (97.9%).

Do you use webcams or other devices to monitor your pet's/pets' activities when you are not home (e.g. at work during the day)?



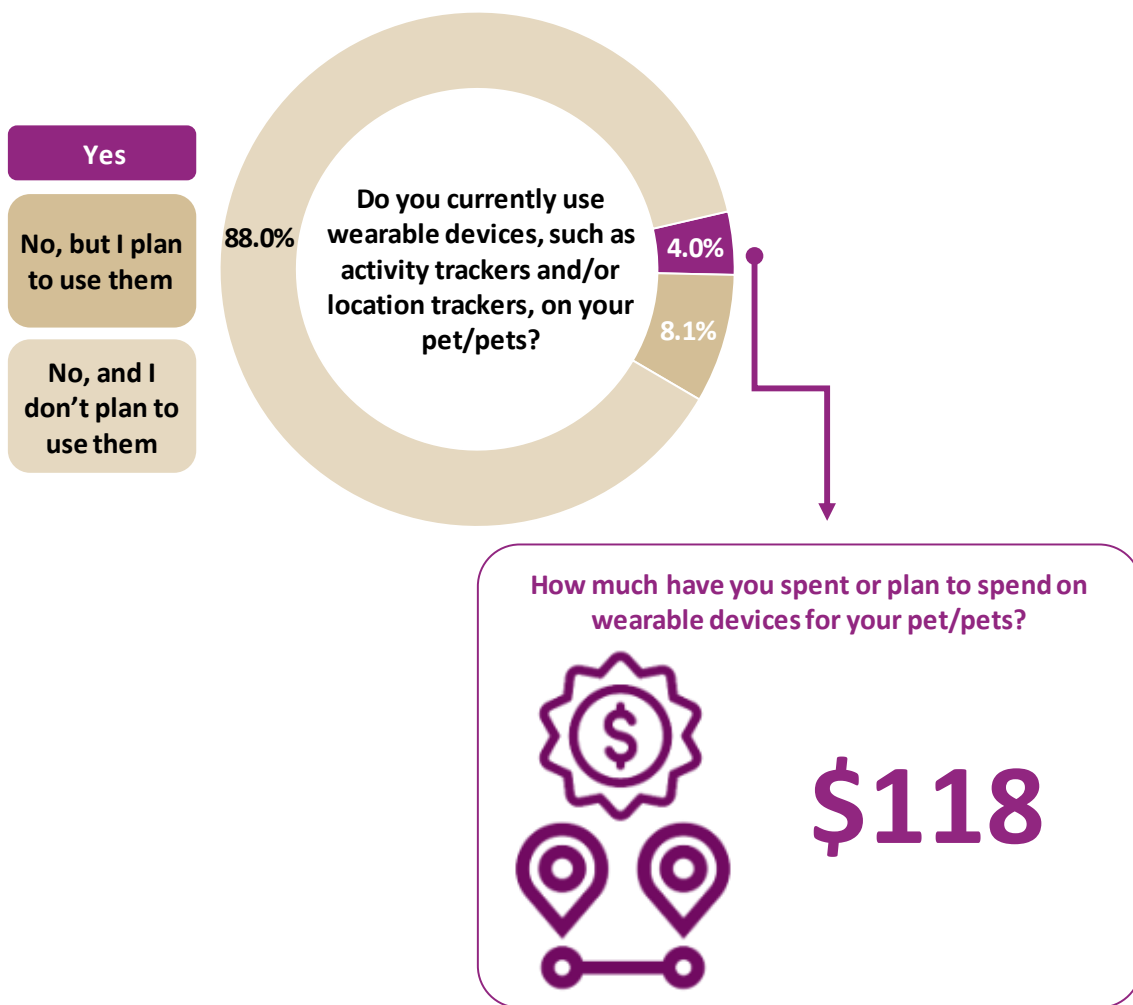
Source: CoreData - Real Pets Survey (October 2018)

Question: Do you use webcams or other devices to monitor your pet's/pets' activities when you are not home (e.g. at work during the day)?

Although the vast majority do not do so, close to one in six (15.6%) say they use webcams or other devices to monitor their pets' activities when they are not at home.

Do you currently use wearable devices, such as activity trackers and/or location trackers, on your pet/pets?

How much have you spent or plan to spend on wearable devices for your pet/pets?



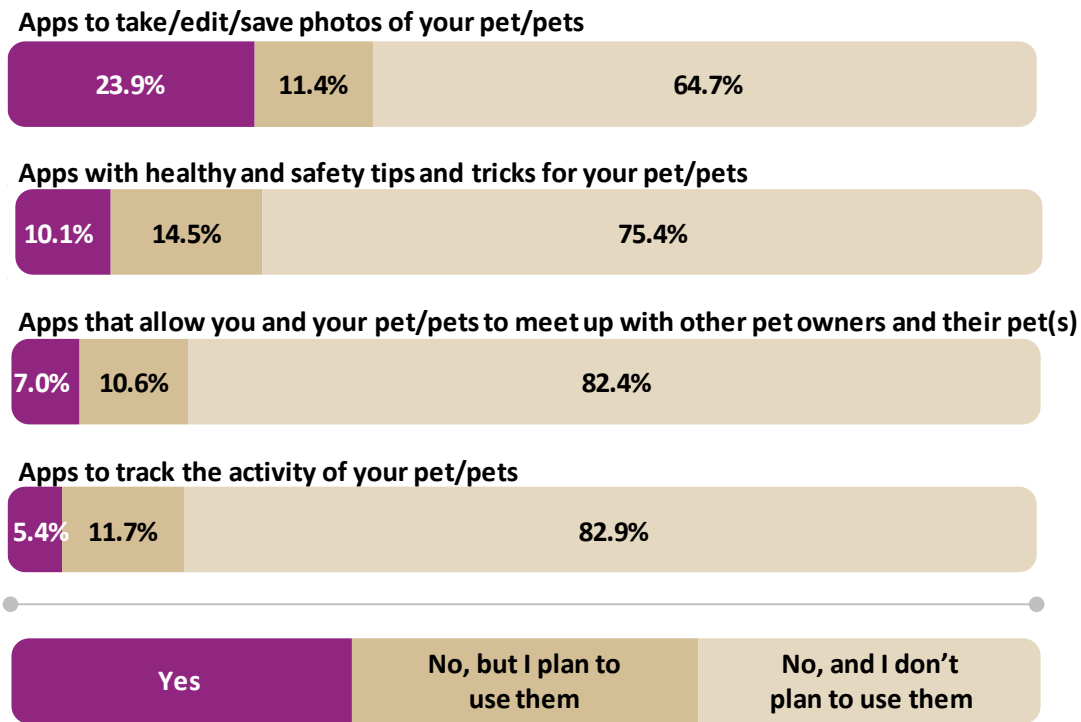
Source: CoreData - Real Pets Survey (October 2018)

Question: Do you currently use wearable devices, such as activity trackers and/or location trackers, on your pet/pets?

How much have you spent or plan to spend on wearable devices for your pet/pets?

Again although the vast majority do not do so, one in eight (12.1%) say they currently use or plan to use wearable devices such as activity trackers and/or location trackers on their pets and have spent or plan to spend an average of \$118 on these wearable devices.

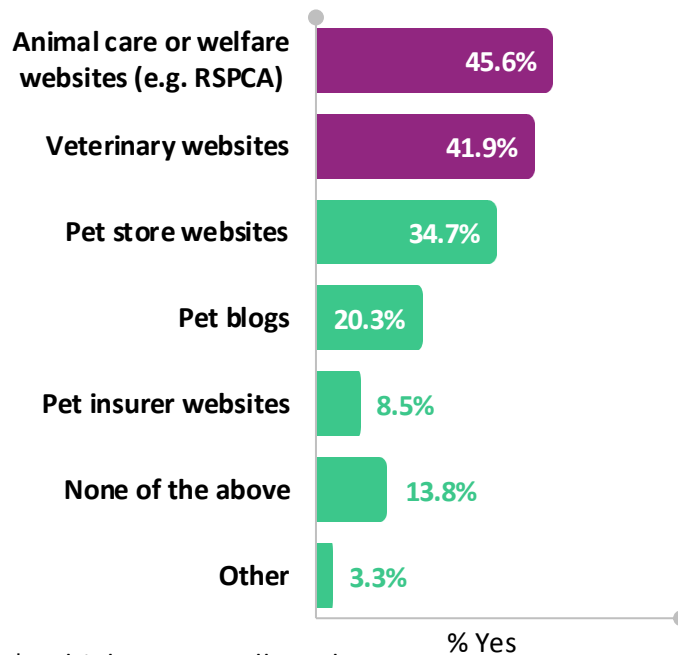
Do you currently use the following apps for your pet/pets?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you currently use the following apps for your pet/pets?

More than a third (35.3%) of respondents say they use or plan to use apps to take or edit or save photos of their pets, while close to a quarter (24.6%) say the same thing for apps with health and safety tips and tricks for their pets. Similar proportions say they use or plan to use apps that allow them and their pets to meet up with other pet owners and their pets (17.6%) and apps to track the activity of their pets (17.1%).

Which of the following websites do you use for information on your pet/pets, such as information on pet food and health?



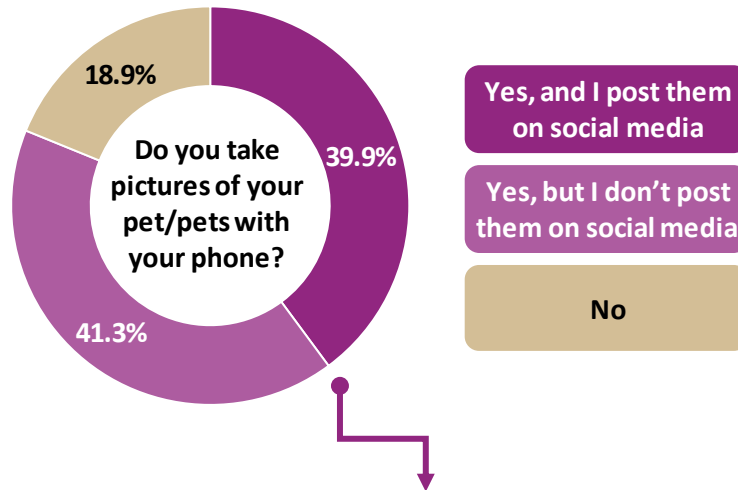
*Multiple answers allowed

Source: CoreData - Real Pets Survey (October 2018)

Question: Which of the following websites do you use for information on your pet/pets, such as information on pet food and health?

While a minor portion of respondents do not visit websites for information on their pets, more than two in five say they visit animal care or welfare websites such as RSPCA (45.6%) and veterinary websites (41.9%) for information on pet food and health. Other respondents say they visit pet store websites (34.7%) and pet blogs (20.3%), while a very small portion say they look at pet insurer websites (8.5%).

Do you take pictures of your pet/pets with your phone?
 Approximately how many pictures of your pet/pets do you have on your phone?
 Approximately how many pictures of your pet/pets do you take every month?

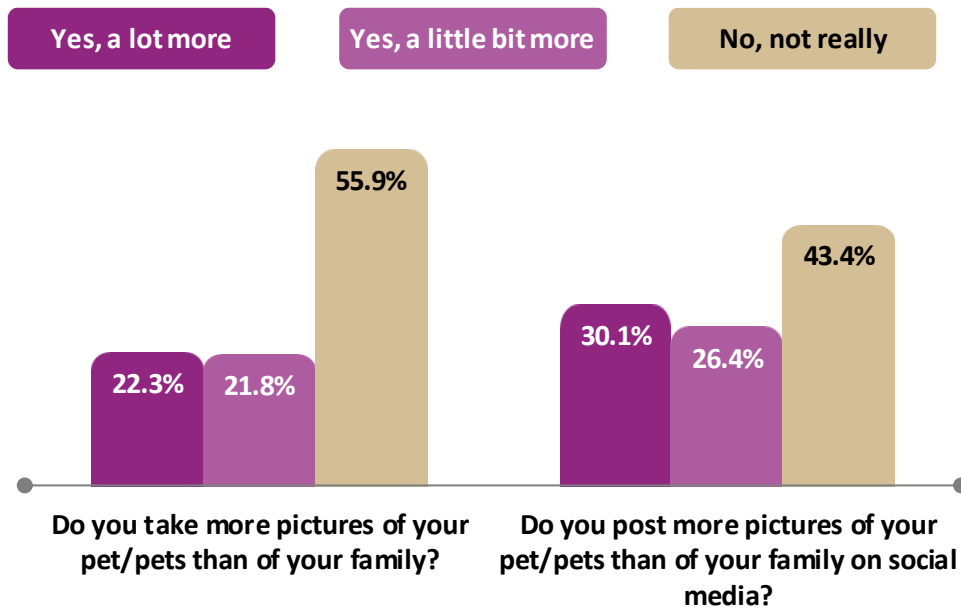


Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you take pictures of your pet/pets with your phone?
 Approximately how many pictures of your pet/pets do you have on your phone?
 Approximately how many pictures of your pet/pets do you take every month?

Similar proportions of respondents say they do take pictures of their pets with their phone, either posting them on social media (39.9%) or not (41.3%) while the remainder do not take photos of their pets with their phone.

Among those who say they take pictures of their pets with their phone, respondents say they have on average 146 photos of their pets on their phone and estimate to take around 13 pictures of their pets every month.

Do you take more pictures of your pet/pets than of your family?
 Do you post more pictures of your pet/pets than of your family on social media?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you take more pictures of your pet/pets than of your family?
 Do you post more pictures of your pet/pets than of your family on social media?

Among those who say they take pictures of their pets with their phone, more than two in five (44.1%) say they have taken more pictures of their pets than of their family.

Among those who say they post pictures of their pets on social media, close to three in five (56.5%) say they post more photos of their pets than of their family on social media.

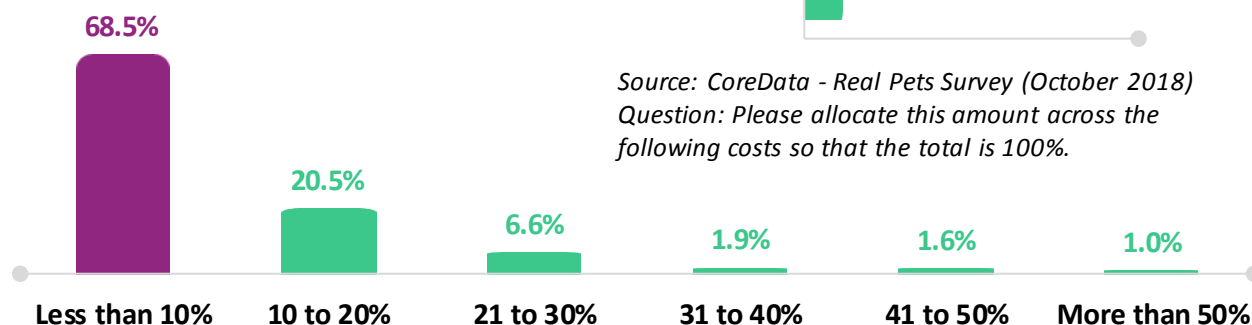
SPENDING ON PETS

- Pet owners spend approximately \$117 on their pets in a month wherein the amount is roughly less than 10% of their monthly income and the bulk of the expense goes to food.
- Most pet owners have spent or planning to spend money on toys and beds for their beds as well as special food and medicines and clothing/accessories.
- Pet owners are more likely to be influenced by other pet owners compared to social media influencers when it comes to purchases for their pets, tend to purchase these products from supermarkets and businesses targeting pet owners and prefer bricks-and-mortar stores over online ones.
- Because pets' birthdays are as important as a family member's or a friend's, many pet owners celebrate their pets' birthdays by getting them special treats, typically shelling out around \$41.
- Fewer pet owners feel they are spending more than they can afford to and pressured to spend more money on their pets and still tend to spend more on gifts or purchases for their family than their pets.
- A minor portion of pet owners have lied when asked how much they spend on pets and have been caught out lying about it, leaving them feeling defensive and embarrassed.
- Interestingly, more than a third of pet owners think Australian pet owners spend too much on their pets.

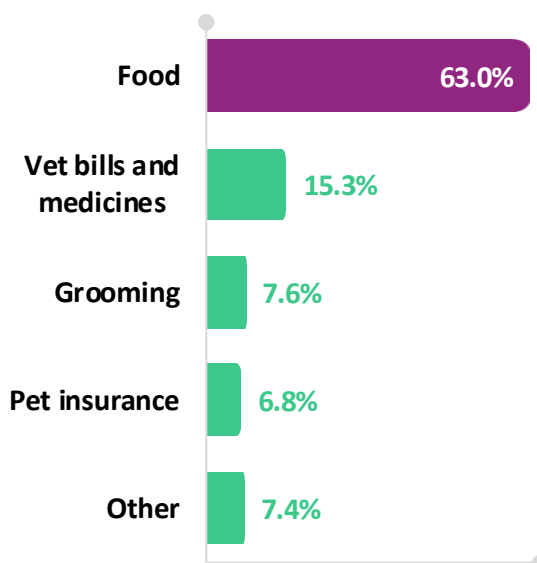
Approximately how much are you spending on your pet/pets in an average month?
 Approximately what proportion of your monthly income does this amount constitute?
 Please allocate this amount across the following costs so that the total is 100%.



Source: CoreData - Real Pets Survey (October 2018)
 Question: Approximately how much are you spending on your pet/pets in an average month?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Approximately what proportion of your monthly income does this amount constitute?

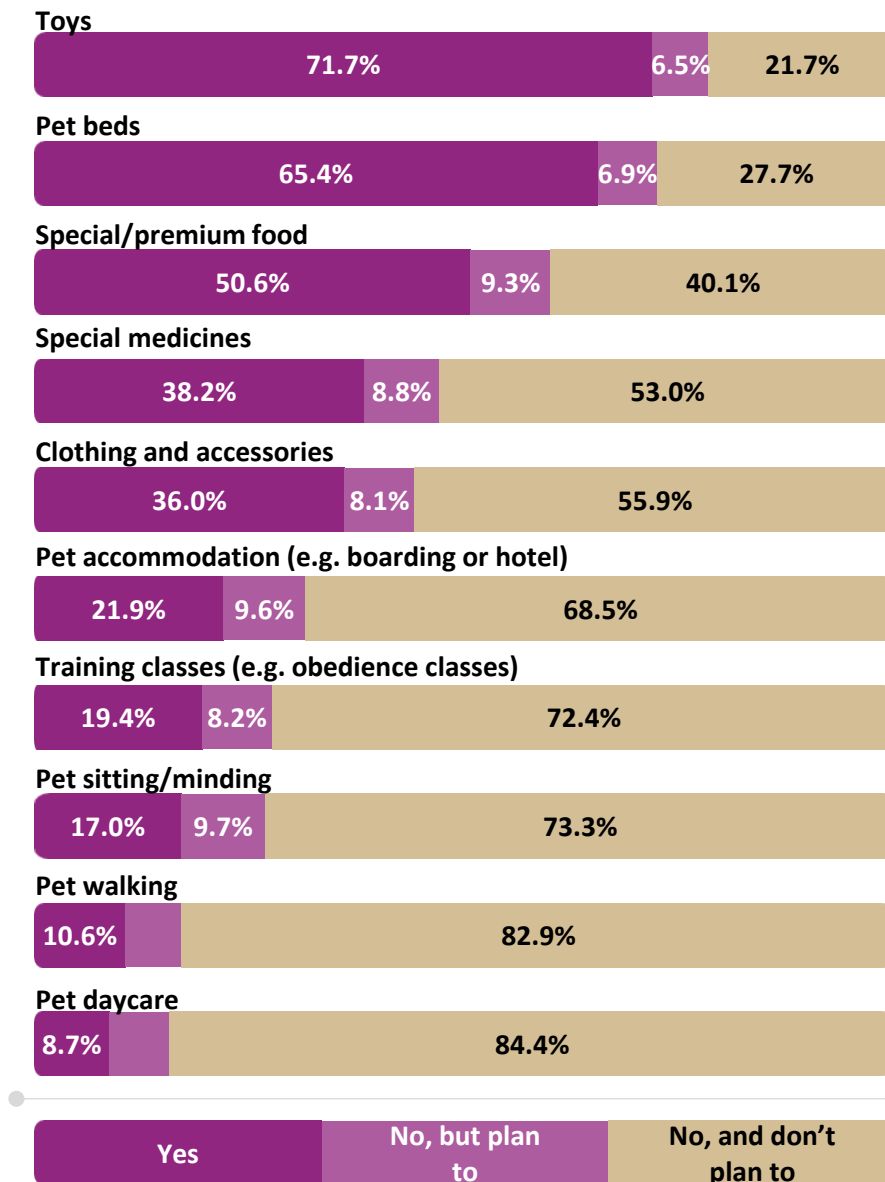


Source: CoreData - Real Pets Survey (October 2018)
 Question: Please allocate this amount across the following costs so that the total is 100%.

Respondents spend an average of \$117 on their pets in a month, in line with the results of a previous study (\$115, Choosi 2017). Close to seven in 10 (68.5%) say this constitutes less than 10% of their monthly income. One in five (20.5%) say this is around to 10% to 20% of their monthly income, while one in nine (11.1%) say this average amount is more than 20% of their monthly income.

The bulk of the average amount respondents spend on their pets monthly goes to food (63.0%), while a portion goes to vet bills and medicines (15.3%). The rest is distributed among grooming (7.6%), pet insurance (6.8%) and other pet-related expenses (7.4%).

Do you spend/have you spent any money on the following for your pet/pets?



Source: CoreData - Real Pets Survey (October 2018)

Question: Do you spend/have you spent any money on the following for your pet/pets?

When was the last time you bought the following for your pet/pets?

Clothing and accessories

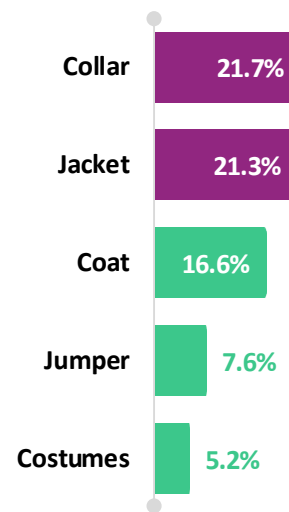
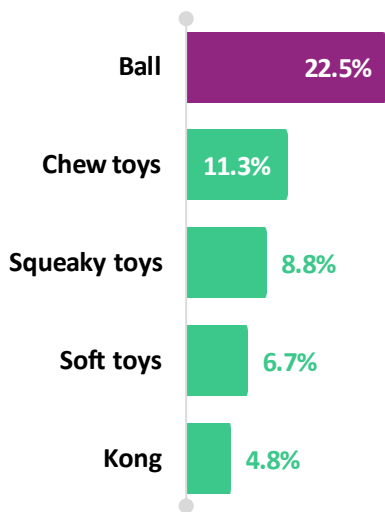


Toys



Source: CoreData - Real Pets Survey (October 2018)
Question: When was the last time you bought the following for your pet/pets?

What toys did you buy for your pet/pets?
What clothing and accessories did you buy for your pet/pets?



Source: CoreData - Real Pets Survey (October 2018)
Question: What toys did you buy for your pet/pets?
*Top 5 responses only

Source: CoreData - Real Pets Survey (October 2018)
Question: What clothing and accessories did you buy for your pet/pets?
*Top 5 responses only

The large majority of respondents spend, have spent or planning to spend money on toys (78.2%) and beds (72.3%) for their pets. They have also put in money for special or premium food (59.9%), special medicines (47.0%) and clothing and accessories (44.1%).

To a lesser extent, respondents also spend, have spent or planning to spend money on pet accommodation (31.5%) and training classes (27.6%). A minor proportion say they have spent or planning to spend money on pet walking (17.1%) and pet daycare (15.6%).

Among respondents who have spent money on toys, clothing and accessories for their pets, most say they have done this in the last 6 months (70.6% and 67.2% respectively), while similar proportions say they have done this in the last year (19.3% and 21.0% respectively).

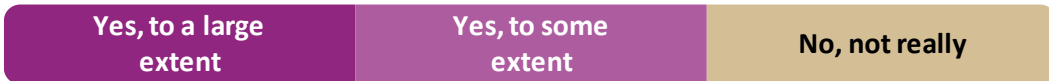
Some of the toys respondents have bought for their pets include balls or chew toys, while collars or jackets are some of the types of clothing and accessories they have purchased for their pets.

Are the purchases you make for your pet/pets influenced by ...?

Other pet owners you know



Social media bloggers/influencers



Source: CoreData - Real Pets Survey (October 2018)

Question: Are the purchases you make for your pet/pets influenced by ...?

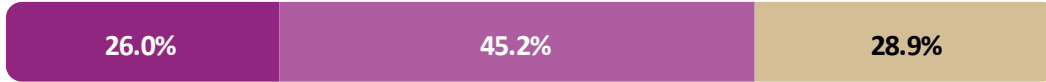
A third of respondents say the purchases they make for their pets are influenced by other pet owners (33.3%), while almost one in five (18.6%) say their pet-related purchases tend to be influenced by social media bloggers or influencers. Respondents with both cats and dogs are most likely to be influenced by other pet owners and social media bloggers while respondents with cats only are the least likely to be influenced.

Do you tend to purchase products for your pet/pets from ...?
Do you tend to purchase products for your pet/pets online or in bricks-and-mortar stores?

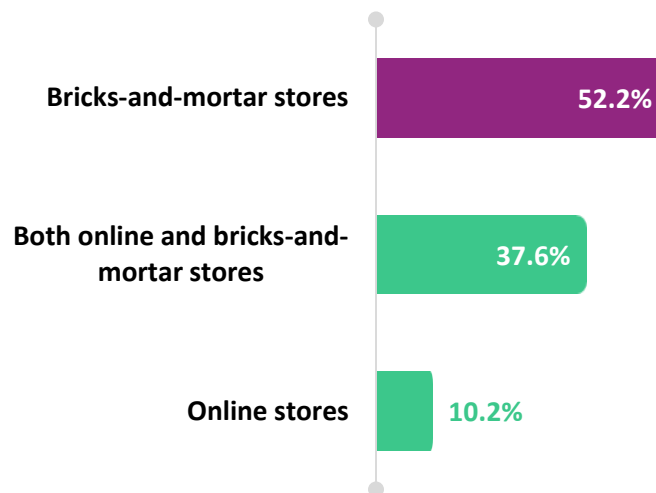
Supermarkets



Businesses specifically targeted at pet owners



Source: CoreData - Real Pets Survey (October 2018)
Question: Do you tend to purchase products for your pet/pets from ...?



Source: CoreData - Real Pets Survey (October 2018)
Question: Do you tend to purchase products for your pet/pets online or in bricks-and-mortar stores?

The vast majority (81.9%) of respondents tend to purchase products for their pets from supermarkets, while more than seven in 10 (71.2%) say they tend to buy from businesses specifically targeted at pet owners.

Respondents with both cats and dogs are most likely to buy products for their pets from businesses specifically targeted at pet owners while those with cats only are the least likely to (76.7% and 64.2% respectively).

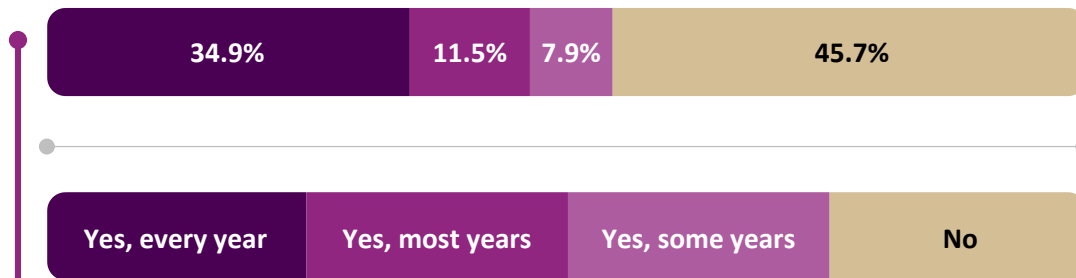
Although close to two-fifths (37.6%) say they tend to purchase products for their pets at both online and bricks-and-mortar stores, more than half (52.2%) say they lean towards purchasing their products at bricks-and-mortar stores while one in 10 (10.2%) to their shopping for their pets online.

Do you celebrate your pet's/pets' birthday?

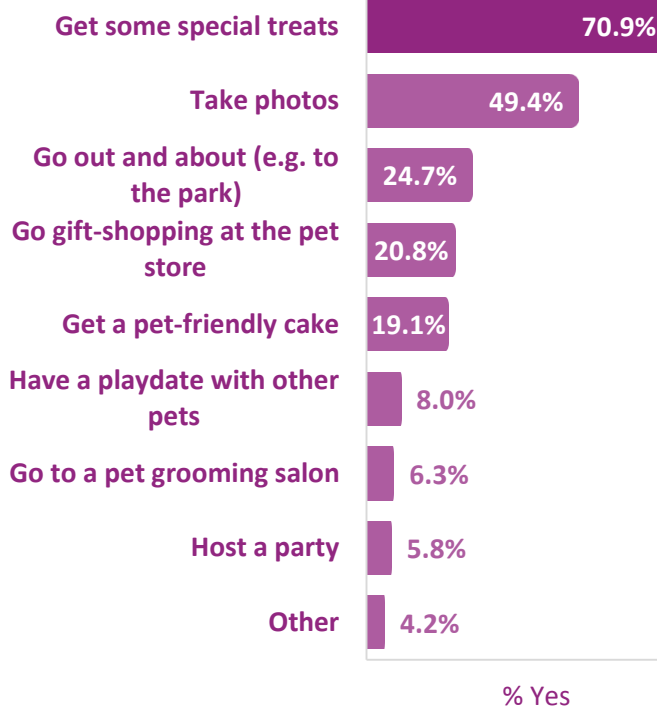
How do you typically celebrate your pet's/pets' birthday?

How much do you typically spend on your pet's/pets' birthday?

Do you celebrate your pet's/pets' birthday?



How do you typically celebrate your pet's/pets' birthday?



How much do you typically spend on your pet's/pets' birthday?

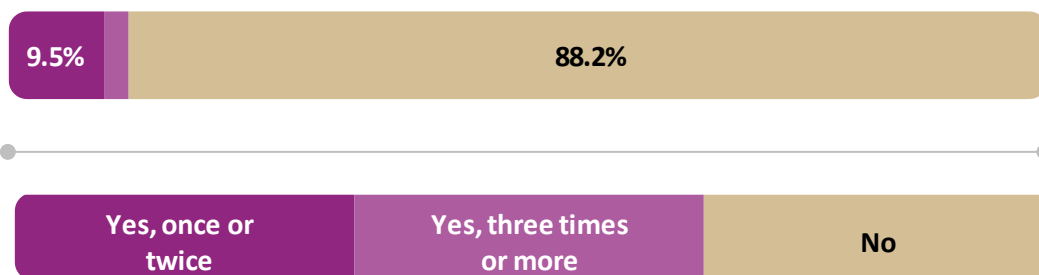


Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you celebrate your pet's/pets' birthday?
 How do you typically celebrate your pet's/pets' birthday?
 How much do you typically spend on your pet's/pets' birthday?

More than half (54.3%) of respondents say they celebrate their pets' birthdays, with more than a third (34.9%) saying they do celebrate the occasion every year.

Among respondents who celebrate their pets' birthdays, seven in 10 (70.9%) typically celebrate it by getting some special treats for their pets. Close to half (49.4%) take lots of photos while almost a quarter say they go out and about (24.7%) with their pets. Similar proportions go gift-shopping at the pet store (20.8%) and get a pet-friendly cake (19.1%). Respondents say they spend an average of \$41 on their pets' birthdays.

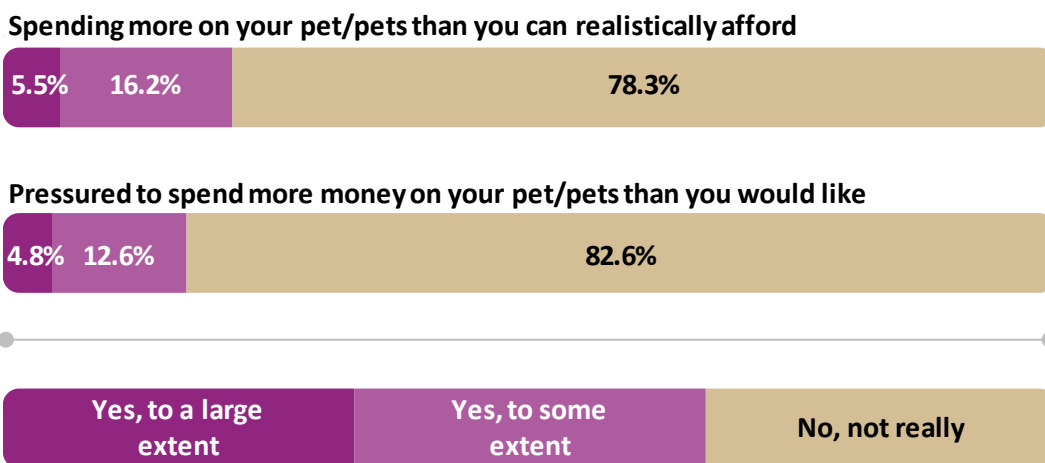
Have you had professional photographs of your pet/pets taken?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Have you had professional photographs of your pet/pets taken?

Although the vast majority of respondents say they have not had professional photographs of their pets taken, one in nine (11.8%) say they have at least once.

Do you feel you are ...?

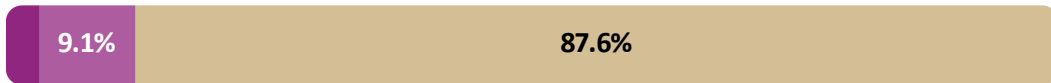


Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you feel you are ...?

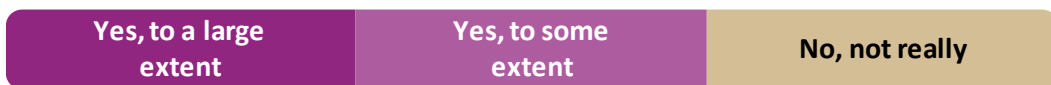
More than one-fifth (21.7%) of respondents feel they are spending more on their pets than they can realistically afford, while to a lesser extent, feel pressured to spend more money on their pets than they would like (17.4%).

Do you feel you are spending more on gifts/purchases for your pet/pets than for your partner/family?
 Do you feel you are spending more on gifts/purchases for your pet/pets than for your children?

Partner/family



Children



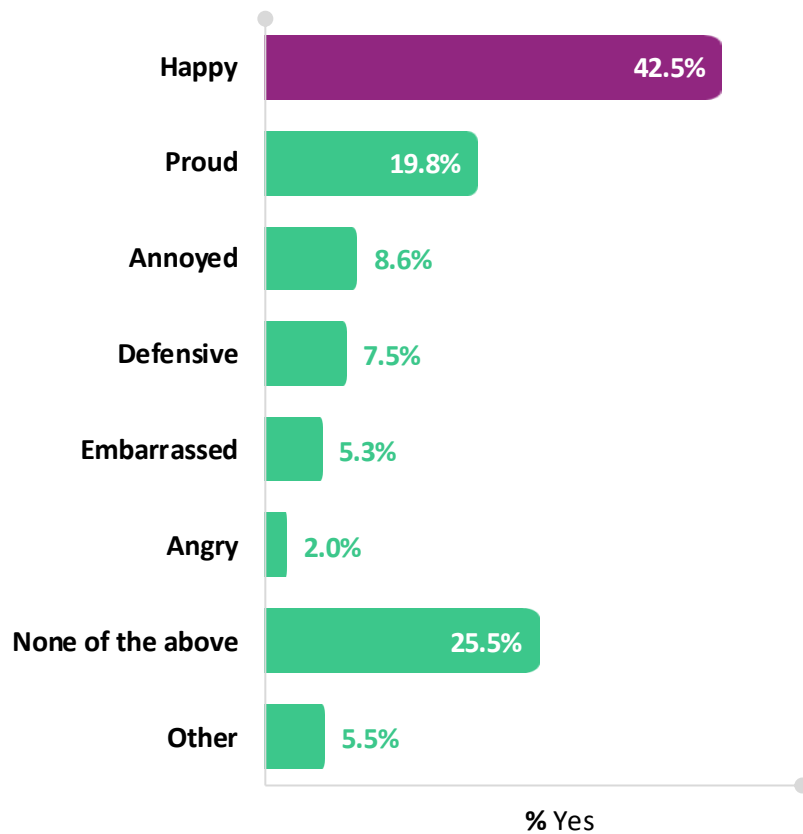
Source: CoreData - Real Pets Survey (October 2018)

Question: Do you feel you are spending more on gifts/purchases for your pet/pets than for your partner/family?

Do you feel you are spending more on gifts/purchases for your pet/pets than for your children?

One in eight (12.3%) partnered respondents feel they are spending more on gifts or purchases for their pets than for their partner or family, while one in 10 (10.9%) respondents with children feel the same towards their pets compared to their children.

How do you typically feel when you are asked about how much you spend on a pet/pets?



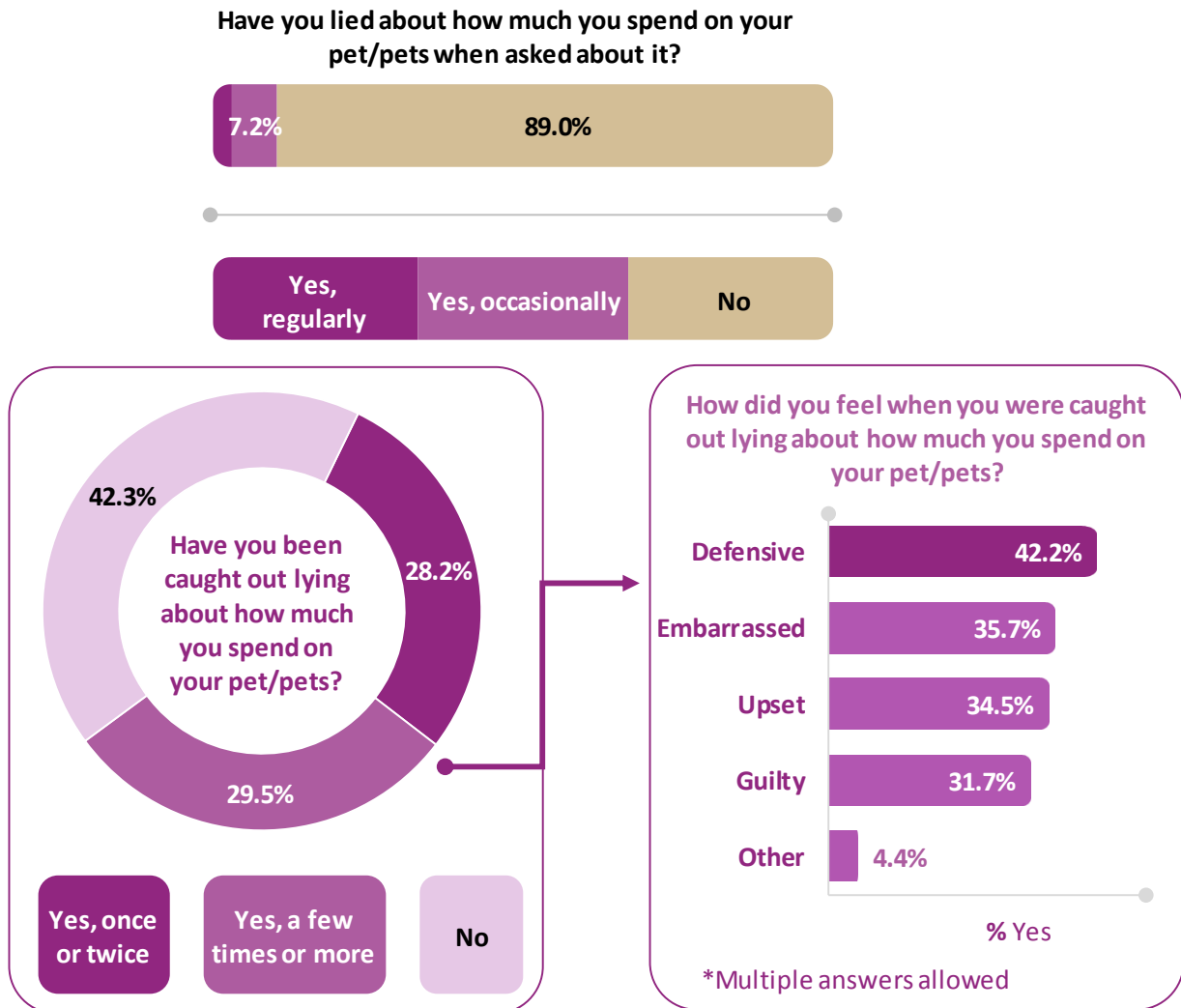
*Multiple answers allowed

Source: CoreData - Real Pets Survey (October 2018)

Question: How do you typically feel when you are asked about how much you spend on a pet/pets?

Although a quarter (25.5%) say they typically do not feel anything when asked about how much they spend on their pets, more than two in five (42.5%) say they feel happy when asked while almost one-fifth (19.8%) feel proud. On the other hand, minor proportions say they feel annoyed (8.6%) and defensive (7.5%) when asked about the amount they spend on their pets.

Have you lied about how much you spend on your pet/pets when asked about it?
 Have you been caught out lying about how much you spend on your pet/pets?
 How did you feel when you were caught out lying about how much you spend on your pet/pets?



Source: CoreData - Real Pets Survey (October 2018)

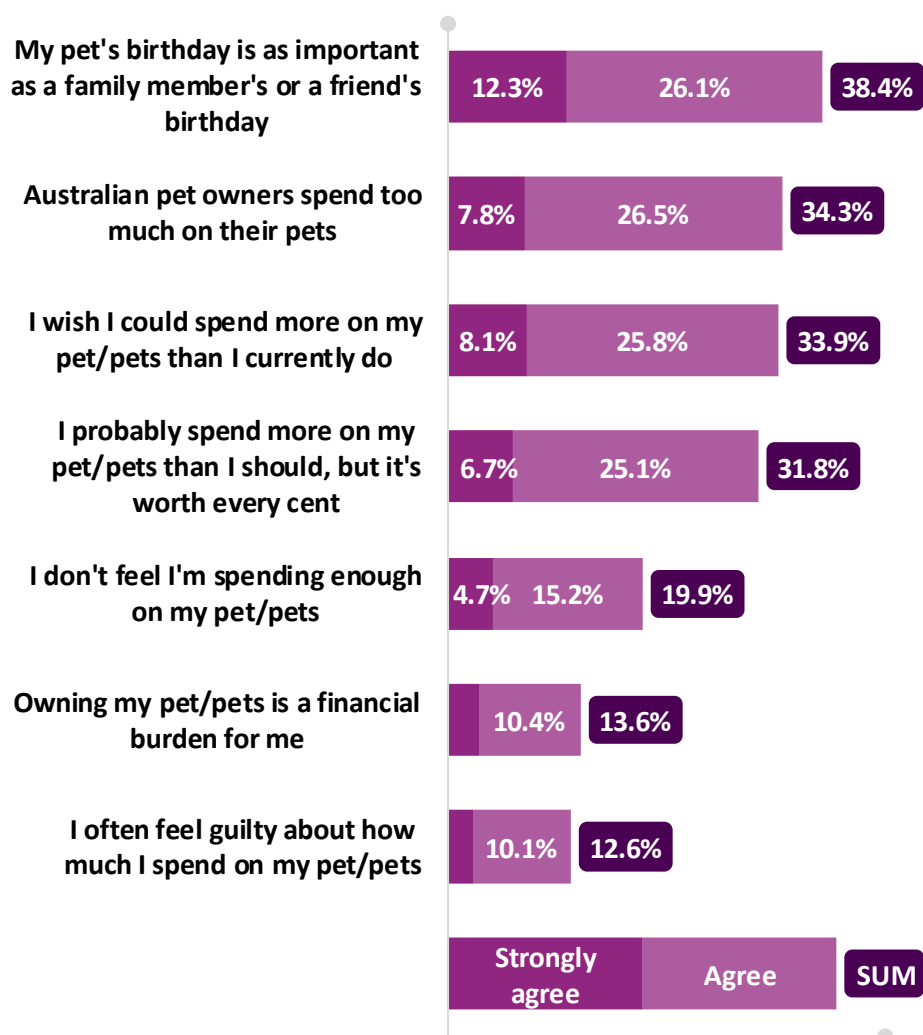
Question: Have you lied about how much you spend on your pet/pets when asked about it?

Have you been caught out lying about how much you spend on your pet/pets?

How did you feel when you were caught out lying about how much you spend on your pet/pets?

While the vast majority of respondents say they have never lied about how much they spend on their pets, one in nine (11.0%) respondents admit they have lied when asked. Of these respondents, close to three in five (57.7%) have been caught out lying about the amount they spend. For those who have been caught, more than two in five (42.2%) say they felt defensive about it. Other respondents say they felt embarrassed (35.7%), upset (34.5%) and guilty (31.7%).

How much do you agree with the following statements about spending on pets?



Source: CoreData - Real Pets Survey (October 2018)

Question: How much do you agree with the following statements about spending on pets?

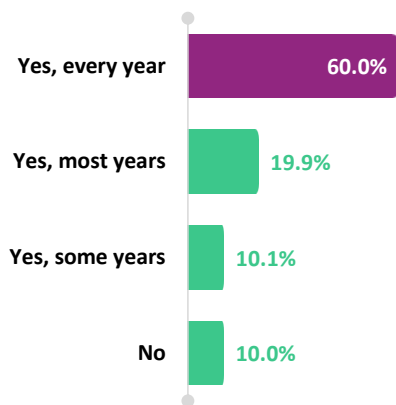
Close to two in five (38.4%) respondents say their pets' birthdays are as important as a family member's or a friend's birthday while similar proportions say they wish they could spend more on their pets than they currently do (33.9%) and that they probably spend more on their pets than they should but it is worth every cent (31.8%). However, more than a third (34.3%) also think Australian pet owners spend too much on their pets.

A minor portion say owning their pets is a financial burden for them (13.6%) and they often feel guilty about how much they spend on their pets (12.6%).

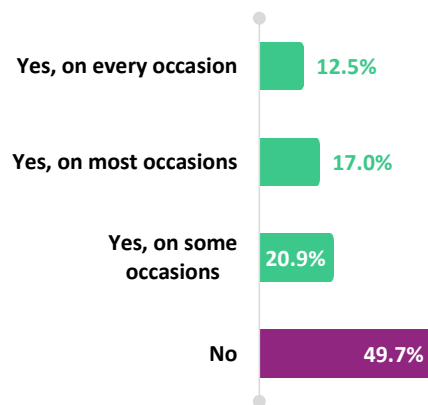
PETS AND CHRISTMAS

- Almost all pet owners say their pets typically spend Christmas with the family but are less likely to bring them along when they go on holidays.
- Pets are also likely to receive gifts this Christmas, with pet owners planning to spend an average of \$43 primarily for toys.
- Again, pet owners may appreciate their pets they are still likely to spend more on gifts for their family than for their pets this Christmas.
- Some pet owners would be happy to receive a new pet as a Christmas gift but only a few say they are likely to give a new pet as a Christmas gift to family or friends.
- If they were to receive or give a pet as Christmas gift, pet owners expect that the pet has been adequately medically checked.

Does your pet/Do your pets typically spend Christmas with you and your family?
Do you typically bring your pet/pets along when you go on holidays, (e.g. for Christmas)?



Source: CoreData - Real Pets Survey (October 2018)
Question: Does your pet/Do your pets typically spend Christmas with you and your family?

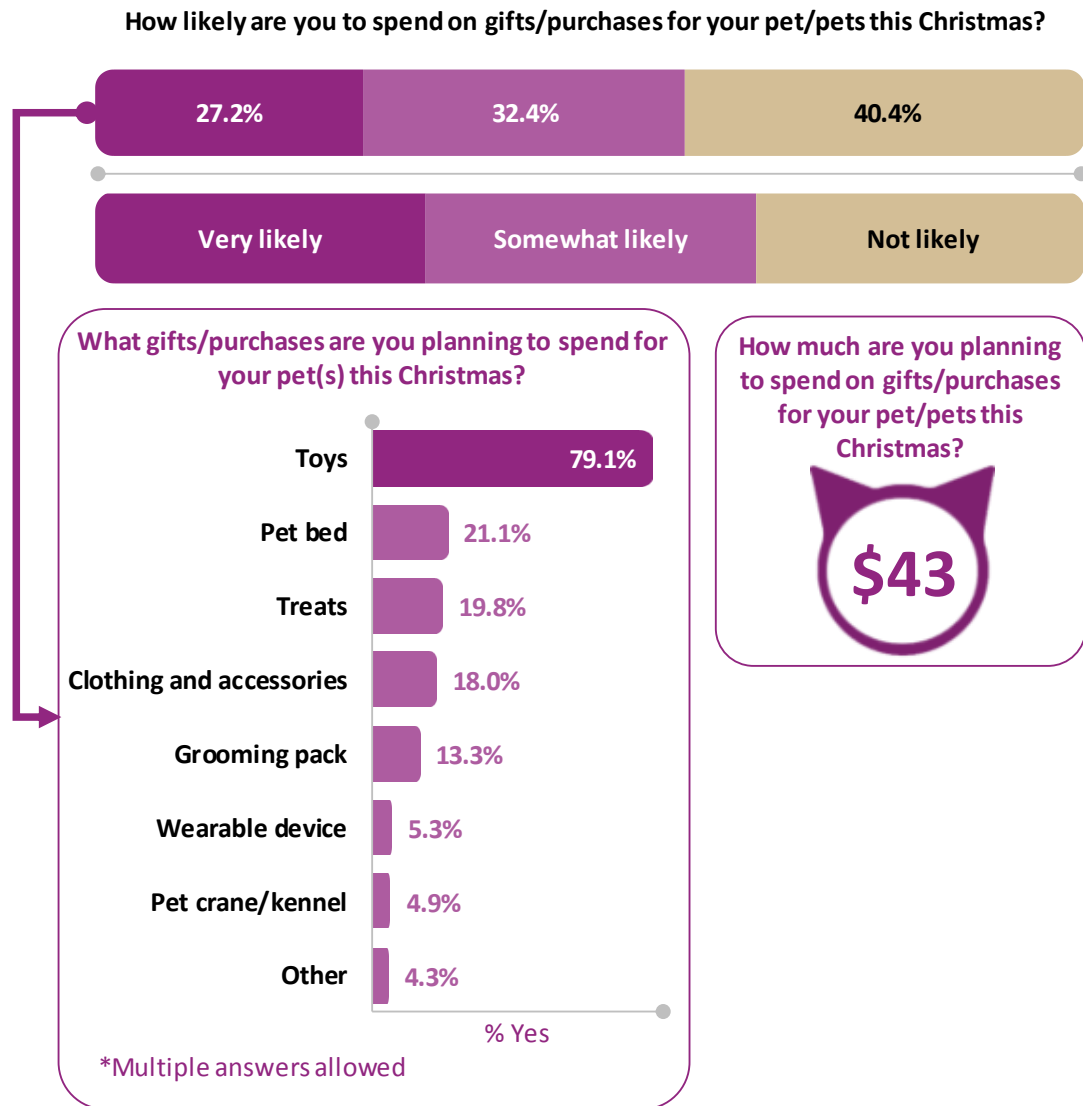


Source: CoreData - Real Pets Survey (October 2018)
Question: Do you typically bring your pet/pets along when you go on holidays, (e.g. for Christmas)?

The overwhelming majority (90.0%) of respondents say their pets typically spend Christmas with them and their family, with 60.0% they do every year.

However, when asked if they typically bring their pets along when they go on holidays, half (50.4%) say they do at least on some occasions.

How likely are you to spend on gifts/purchases for your pet/pets this Christmas?
 How much are you planning to spend on gifts/purchases for your pet/pets this Christmas?
 What gifts/purchases are you planning to spend for your pet(s) this Christmas?



Source: CoreData - Real Pets Survey (October 2018)
 Question: How likely are you to spend on gifts/purchases for your pet/pets this Christmas? How much are you planning to spend on gifts/purchases for your pet/pets this Christmas? What gifts/purchases are you planning to spend for your pet(s) this Christmas?

Close to three in five (59.6%) respondents say they are likely to spend on gifts or purchases for their pets this Christmas and of those who would, they estimate they would be spending \$43. Toys are the most popular gift or purchase respondents are planning to spend on for their pets this Christmas (79.1%). They are also planning to purchase pet beds (21.1%), treats (19.8%), clothing and accessories (18.0%) and grooming packs (13.3%).

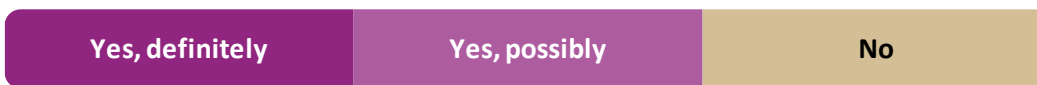
Are you planning to spend more on gifts/purchases for your pet/pets than for your family/partner this Christmas?

Are you planning to spend more on gifts/purchases for your pet/pets than for your children this Christmas?

Family/partner



Children



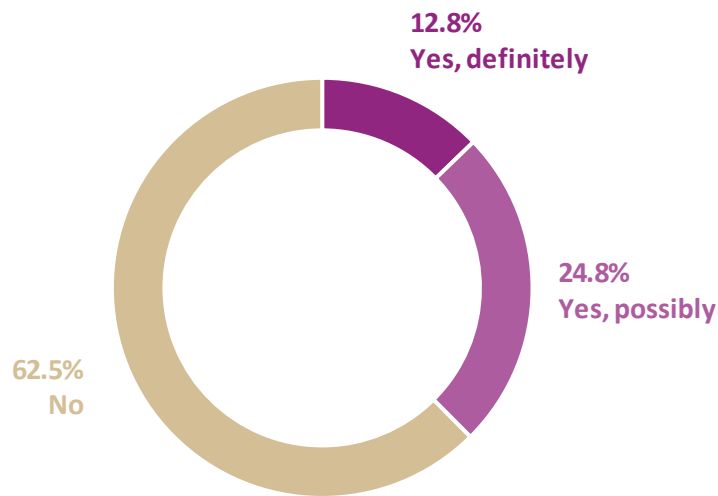
Source: CoreData - Real Pets Survey (October 2018)

Question: Are you planning to spend more on gifts/purchases for your pet/pets than for your family/partner this Christmas?

Are you planning to spend more on gifts/purchases for your pet/pets than for your children this Christmas?

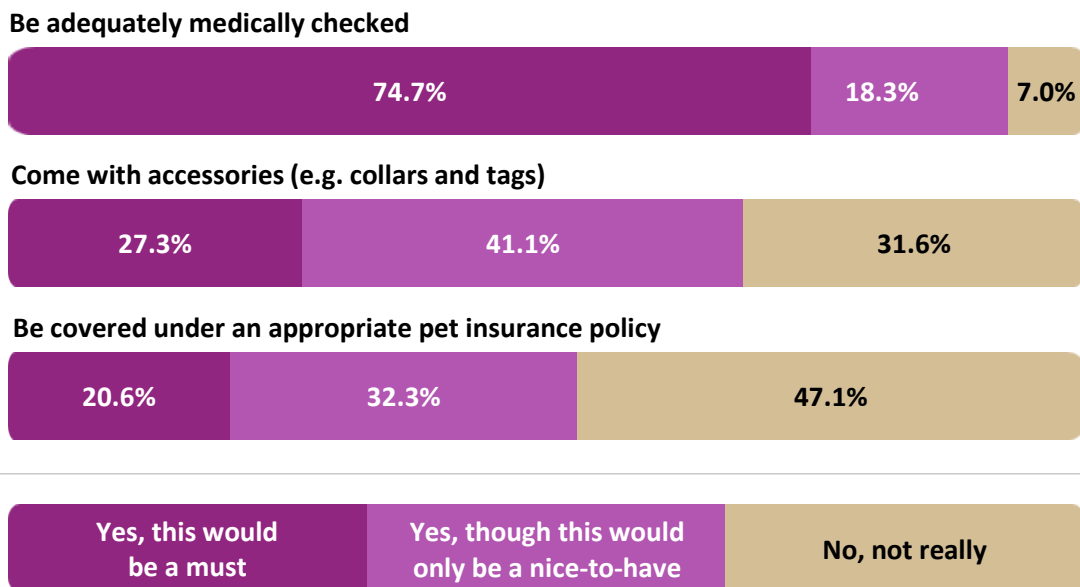
More than one in six (17.3%) partnered respondents say they are planning to spend more on gifts or purchases for their pets than for their partner or family this Christmas, while more than one in seven (15.3%) respondents with children feel the same way towards their pets compared to their children.

Would you be happy to receive a new pet as a Christmas gift?



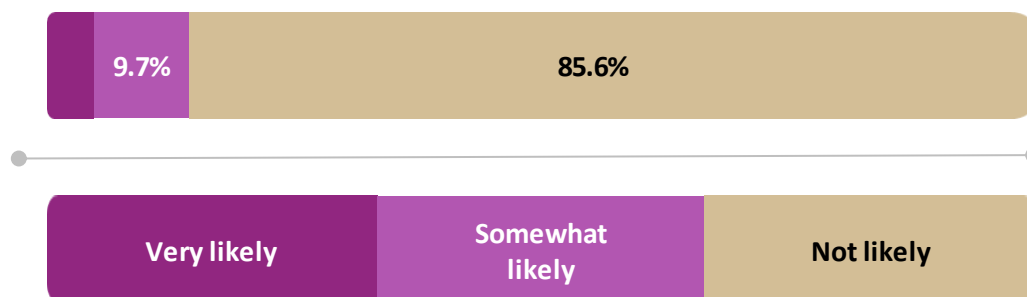
Source: CoreData - Real Pets Survey (October 2018)
 Question: Would you be happy to receive a new pet as a Christmas gift?

Assuming you were to receive a new pet as a Christmas gift, would you expect it to ...?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Assuming you were to receive a new pet as a Christmas gift, would you expect it to ...?

How likely are you to give a new pet as a Christmas gift to family, friends or relatives?



Source: CoreData - Real Pets Survey (October 2018)

Question: How likely are you to give a new pet as a Christmas gift to family, friends or relatives?

Assuming you were to give a new pet as a Christmas gift, would you have it ...?

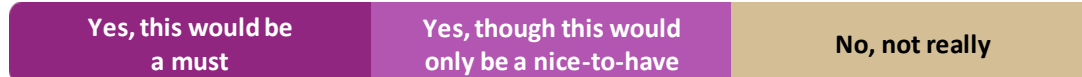
Be adequately medically checked



Come with accessories (e.g. collars and tags)



Be covered under an appropriate pet insurance policy



Source: CoreData - Real Pets Survey (October 2018)

Question: Assuming you were to give a new pet as a Christmas gift, would you have it ...?

Close to two in five (37.6%) respondents say they would be happy to receive a new pet as a Christmas gift.

If they were to receive a new pet as a Christmas gift, nearly all respondents say they would expect it to be adequately medically checked (93.0%). More than two-thirds (68.4%) say they expect it would come with accessories such as collars or tags, while more than half (52.9%) would like it to be covered under an appropriate pet insurance.

One in seven (14.4%) respondents say they are likely to give a new pet as a Christmas gift to family, friends or relatives.

If they were to give a new pet as a Christmas gift, nearly all respondents say they would have it be adequately medically checked (91.5%). Three-quarters (68.4%) say the pet would come with accessories such as collars or tags, although less than half (46.5%) would have it covered under an appropriate pet insurance.

ATTITUDES TOWARDS PETS

- Nearly all pet owners say owning pets makes them happier especially on a day-to-day basis, less lonely and is good for their mental and physical health.
- Many pet owners have gained positive attention from others because of their pets and generally tend to have more sympathy for pets and animals than other people.
- The top tips pet owners have for first-timers include considering whether they can commit the time to take care of the pet, whether the pet will fit their lifestyle as well as the costs and how pet-friendly their homes are.
- The vast majority of pet owners have experienced the passing of a pet and had either a burial or cremation for their pet.
- Most pet owners believe the grief from the passing of a pet is always harder than initially imagined and that one can never truly replace a pet that has passed with a new pet.
- On travelling with pets on either public transport or planes, pet owners are unanimous in saying they would avoid travelling with their pets on planes/public transport as much as possible and would only travel with their pets on them if they did not have any other choice.
- Nearly all pet owners think Australians should be encouraged to adopt more rescue animals and to provide more support to organisations that focus on rescuing animals and finding them suitable homes, even going as far as saying they would be happy to adopt a rescue animal as a new pet.
- Although many pet owners believe Australia is becoming a more pet-friendly nation, owning a pet could become tricky due to one's living situation such as difficulty for renters compared to home owners and people in apartments compared to ones living in free-standing houses.
- Most pet owners think there are enough or there should be more pet-friendly public spaces, cafes/restaurants and workplaces across Australia.
- Many employed pet owners believe having pets in the workplace reduces stress and improves productivity but only fewer respondents can say their workplaces are pet-friendly.

What do you see as the main emotional value of owning a pet?

"I usually get pets from shelters and this helps an animal to have a good home and they have always been good pets, not pedigreed but good animals all the same. A pet gives me someone to come home to and they are very loyal and nice to have around. Pets make me go for a walk and do some exercise when otherwise I might not and also to have the cat as a nice soft cuddly animal to pat and look after is good. I think pets are good therapy as they are always there for you and don't judge you and are gentle and kind and have their own personalities." (Female, 61 years old, NSW)

"It is a great bond of friendship and emotional support. Dogs are very good at sensing emotional need and showing care when a person is upset. We interact with them in this way and they give the friendship back." (Female, 62 years old, TAS)

"Seeing their little souls reflected back to you in their eyes. I am a foster carer with a cat rescue so as well as having my own two cats I sometimes foster up to 10 others and help rehome them. This is enormously rewarding for me as I love each and every kitty that comes to my home. My only regret as that I didn't get into fostering sooner." (Female, 48 years old, VIC)

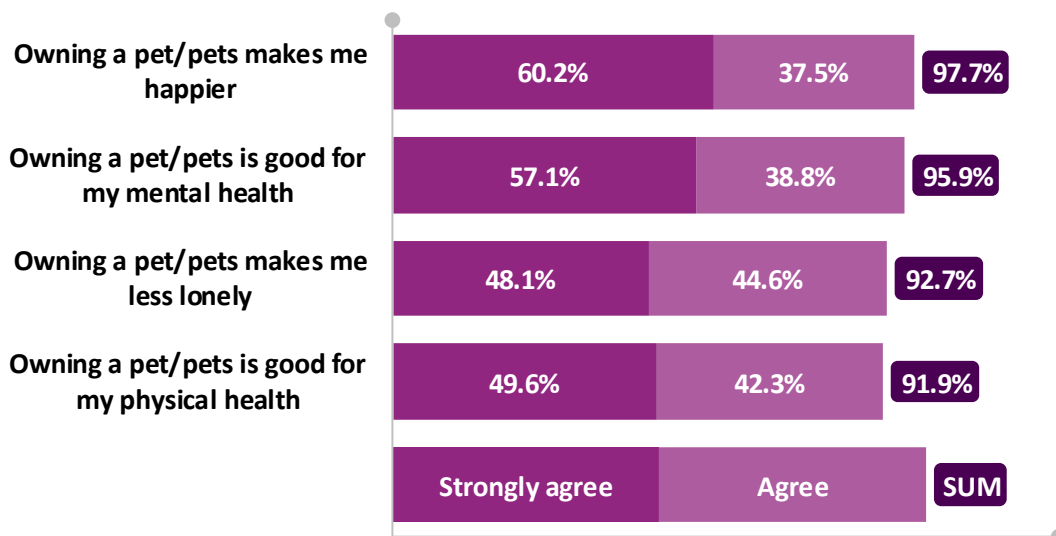
"Companion animals bring joy. My cat is my muse draped over my shoulder when I write. One of the reasons to get up every day. A naughty clown that makes us belly laugh and never put a Christmas tree up in fourteen years. Blood pressure is lowered by stroking her. Stress evaporates playing with her." (Female, 60 years old, QLD)

"On an emotional level, owning a pet can decrease depression, stress and anxiety; health-wise, it can lower your blood pressure, improve your immunity and even decrease your risk of heart attack and stroke. But the positives don't stop there." (Female, 26 years old, NT)

"Having someone even if they can't talk to you can listen and comfort you when down." (Female, 27 years old, SA)

"You have a special bond with a dog of your own. You love your dog and it loves you back. When you're upset, it knows; and when your dog is not well, you know. Dogs are very special and they really grow on you. They really do become your best friend." (Female, 54 years old, WA)

How much do you agree with the following statements about owning a pet/pets?

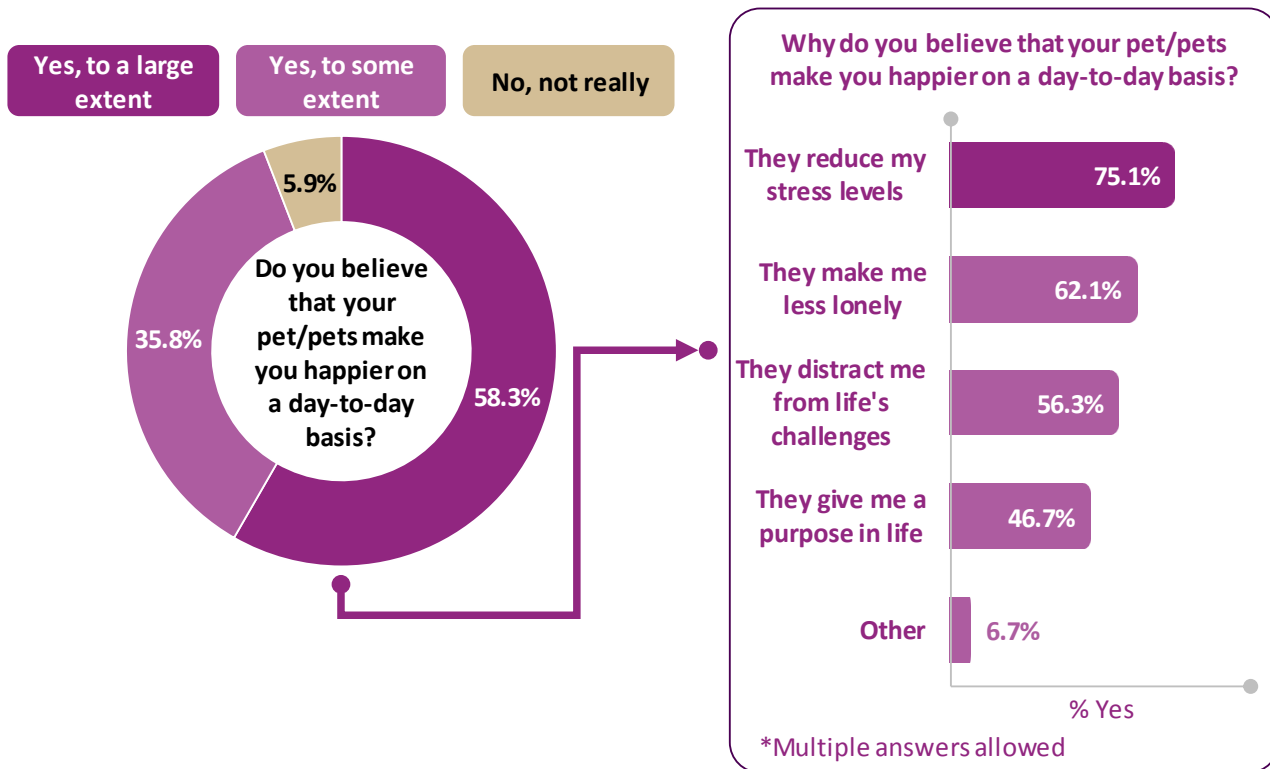


Source: CoreData - Real Pets Survey (October 2018)

Question: How much do you agree with the following statements about owning a pet/pets?

Almost all respondents say owning pets makes them happier (97.7%) and less lonely (92.7%). They also say owning pets is good for their mental (95.9%) and physical (91.9%) health. These are in line with last year’s Choosi results.

Do you believe that your pet/pets make you happier on a day-to-day basis?
 Why do you believe that your pet/pets make you happier on a day-to-day basis?

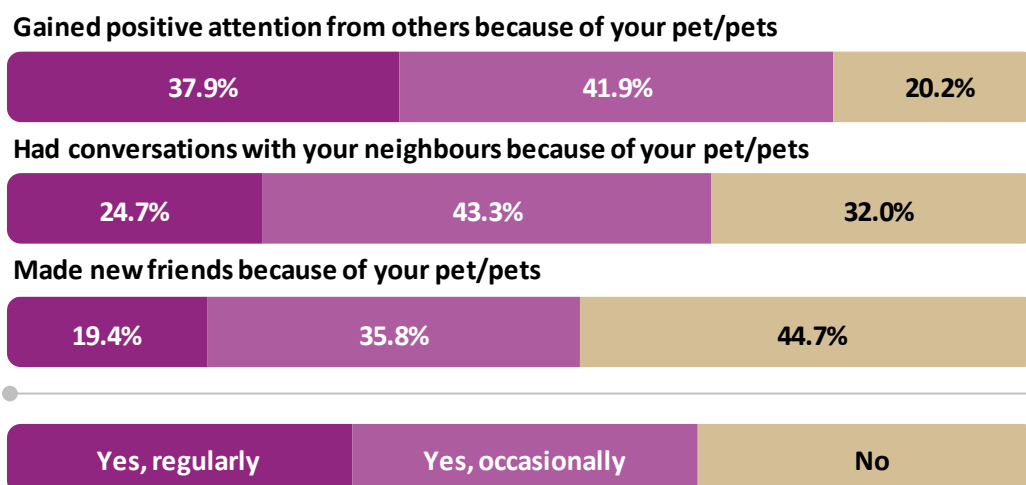


Source: CoreData - Real Pets Survey (October 2018)

Question: Do you believe that your pet/pets make you happier on a day-to-day basis? Why do you believe that your pet/pets make you happier on a day-to-day basis?

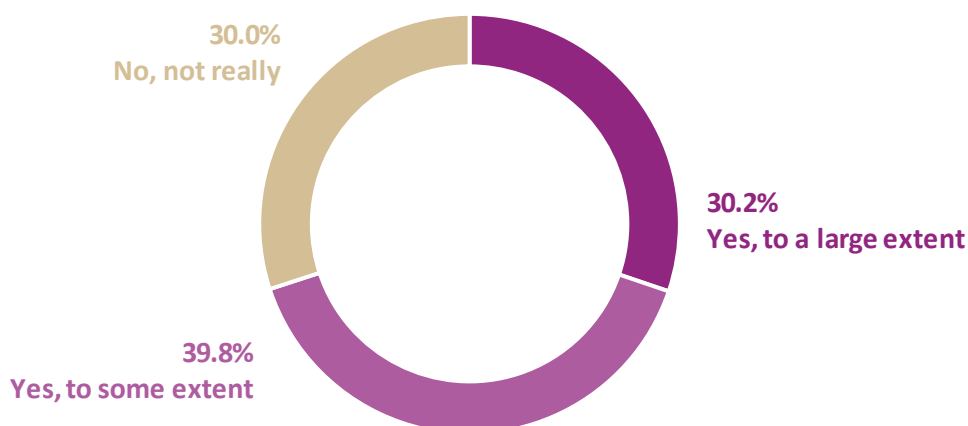
The overwhelming majority (94.1%) of respondents believe their pets make them happier on a day-to-day basis, pointing to their pets as a major factor for reducing their stress levels (75.1%). Pets also make them less lonely (62.1%), distract them from life’s challenges (56.3%) and give them a purpose in life (46.7%).

Have you ever ...?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Have you ever ...?

Generally speaking, do you tend to have more sympathy for pets and animals than other people?

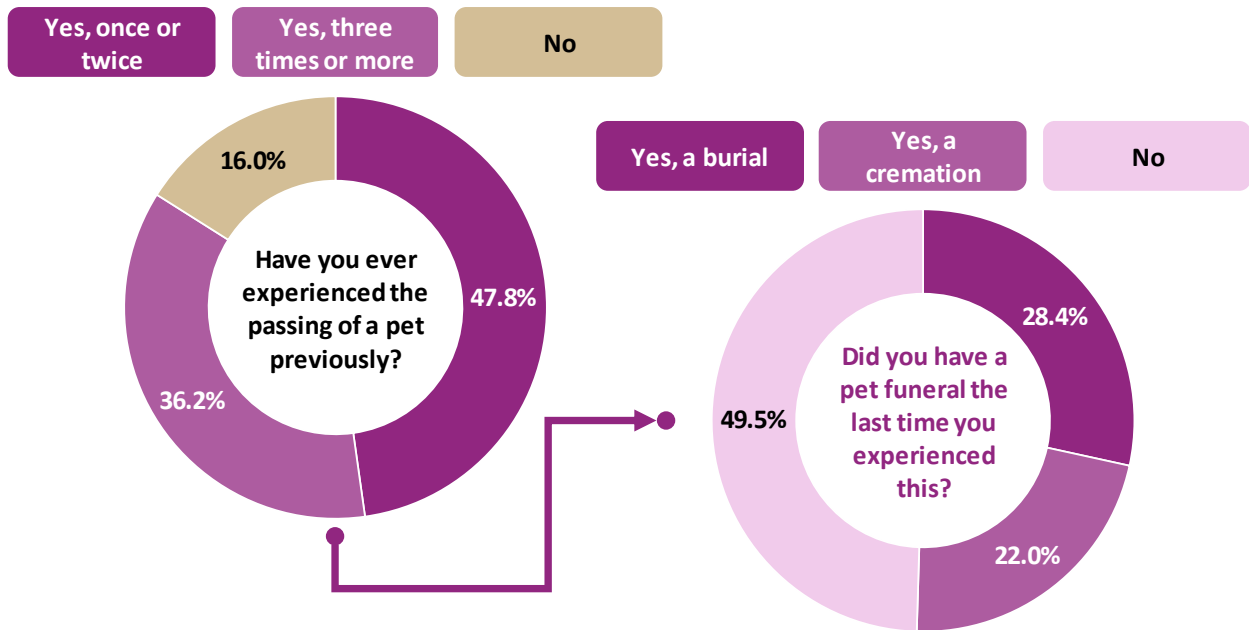


Source: CoreData - Real Pets Survey (October 2018)
 Question: Generally speaking, do you tend to have more sympathy for pets and animals than other people?

Close to four in five (79.8%) respondents say they have gained positive attention from others because of their pets, while more than two-thirds (68.0%) have had conversations with their neighbours (whom they would not normally talk to) because of their pets. Almost three in five (55.2%) say they have made new friends because of their pets.

Seven in 10 (70.0%) respondents say they tend to have more sympathy for pets and animals than other people.

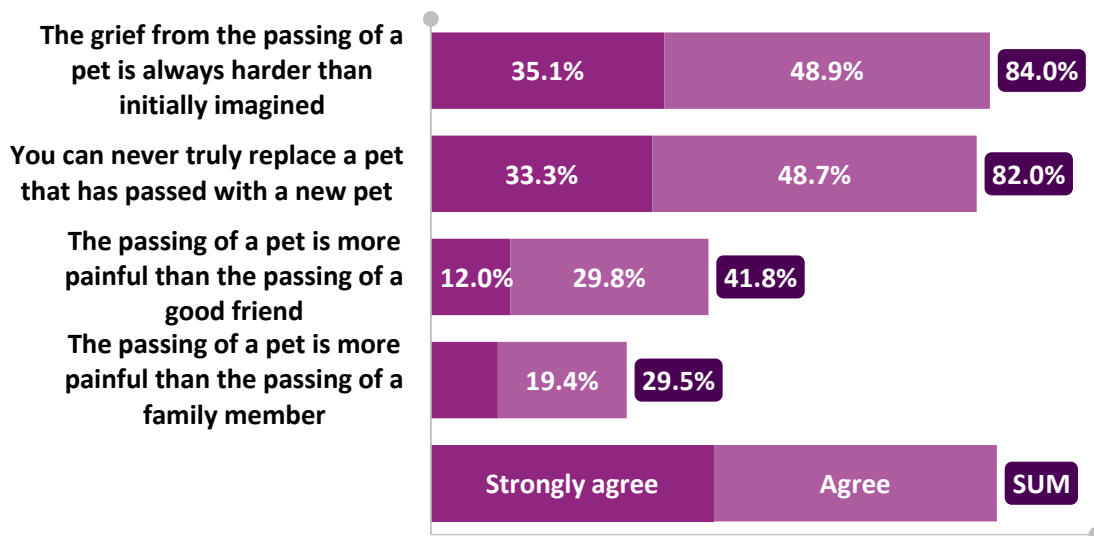
Have you ever experienced the passing of a pet previously?
 Did you have a pet funeral the last time you experienced this?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Have you ever experienced the passing of a pet previously? Did you have a pet funeral the last time you experienced this?

The vast majority (84.0%) of respondents say they have experienced the passing of a pet at least once before. Of these respondents, close to three in 10 (28.4%) say they had a burial and more than one in five (22.0%) say they had a cremation the last time a pet passed away.

How much do you agree with the following statements about the passing of a pet?



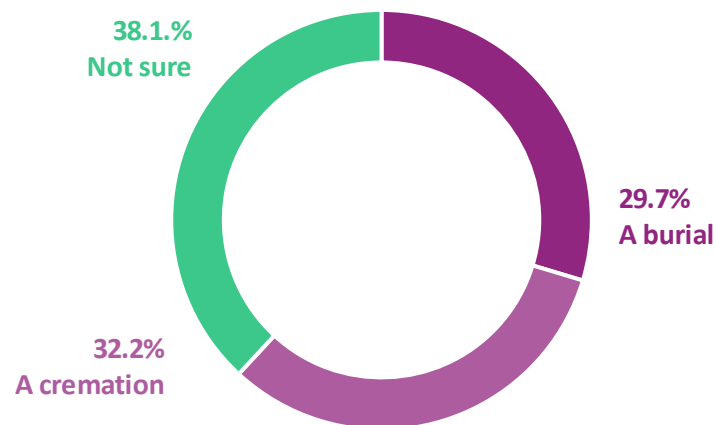
Source: CoreData - Real Pets Survey (October 2018)

Question: How much do you agree with the following statements about the passing of a pet?

The vast majority of respondents believe the grief from the passing of a pet is always harder than initially imagined (84.0%) and that one can never truly replace a pet that has passed with a new pet (82.0%).

Fewer respondents say that the passing of a pet is more painful than the passing of a good friend (41.8%) or of a family member (29.5%).

Would you prefer a burial or a cremation to farewell your pet/pets?



Source: CoreData - Real Pets Survey (October 2018)

Question: Would you prefer a burial or a cremation to farewell your pet/pets?

How much would you be willing to spend on a funeral for your pet/pets?

\$158

A large, stylized purple paw print graphic is positioned below the dollar amount.

Source: CoreData - Real Pets Survey (October 2018)

Question: How much would you be willing to spend on a funeral for your pet/pets?

While close to two in five (38.1%) are unsure on whether they prefer a burial or cremation to say goodbye to their pets, almost a third (32.2%) of respondents prefer a cremation while close to three in 10 (29.7%) would rather have a burial for their pets.

Respondents say they are willing to spend an average of \$158 on a funeral for their pets.

Ideally, how would you want to farewell your pet/pets?

*"My last dog had been my best friend for many years. I had him cremated and put in an urn/pot and I put a collar and tag like he had around the pot and have it in the family room as he can still be part of the family. If I had my own yard, I would probably bury a passed away pet in the garden if I could."
(Female, 37 years old, WA)*

*"A nice but not over the top small gathering of close family members. To be buried somewhere at home and remembered with a small sign or grave or plant to grow but nothing too fancy."
(Female, 38 years old, VIC)*

*"A quiet funeral at home, and buried under their favourite tree/ spot with a plaque with their name on it and their years (birth and death) and how much they are loved and missed."
(Female, 36 years old, QLD)*

*"Buried in the garden, preferably in one of their favourite places. Statue or headstone placed on or nearby. Place flowers on site now and then."
(Female, 56 years old, SA)*

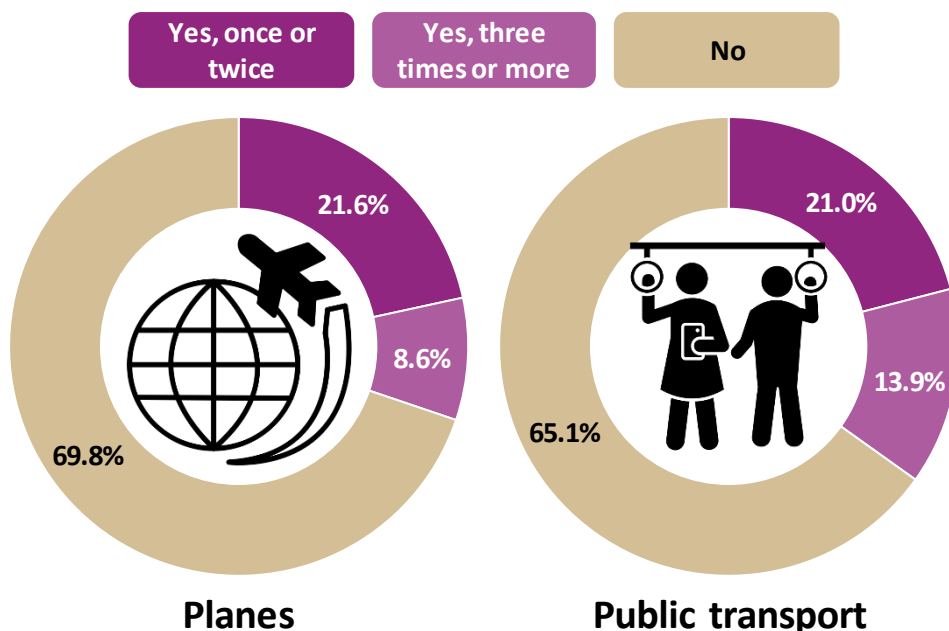
*"I have all my past pets cremated and in wooden boxes with a memorial plaque. We had a family gathering. We had momentous such as coffee mugs and albums made."
(Female, 67 years old, NSW)*

*"Take them to the beach and scatter their ashes."
(Female, 28 years old, TAS)*

*"Bury it in a favourite spot in the garden and plant flowers over it."
(Female, 60 years old, ACT)*

If you had the opportunity would you travel with your pet/pets on ...?

How likely are you to travel with your pet/pets on the following in the future?



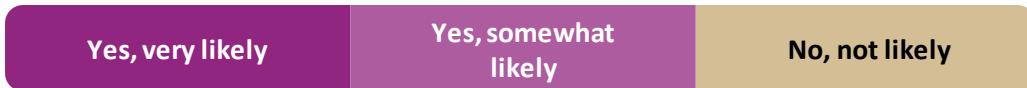
Source: CoreData - Real Pets Survey (October 2018)

Question: If you had the opportunity would you travel with your pet/pets on ...?

Planes



Public transport



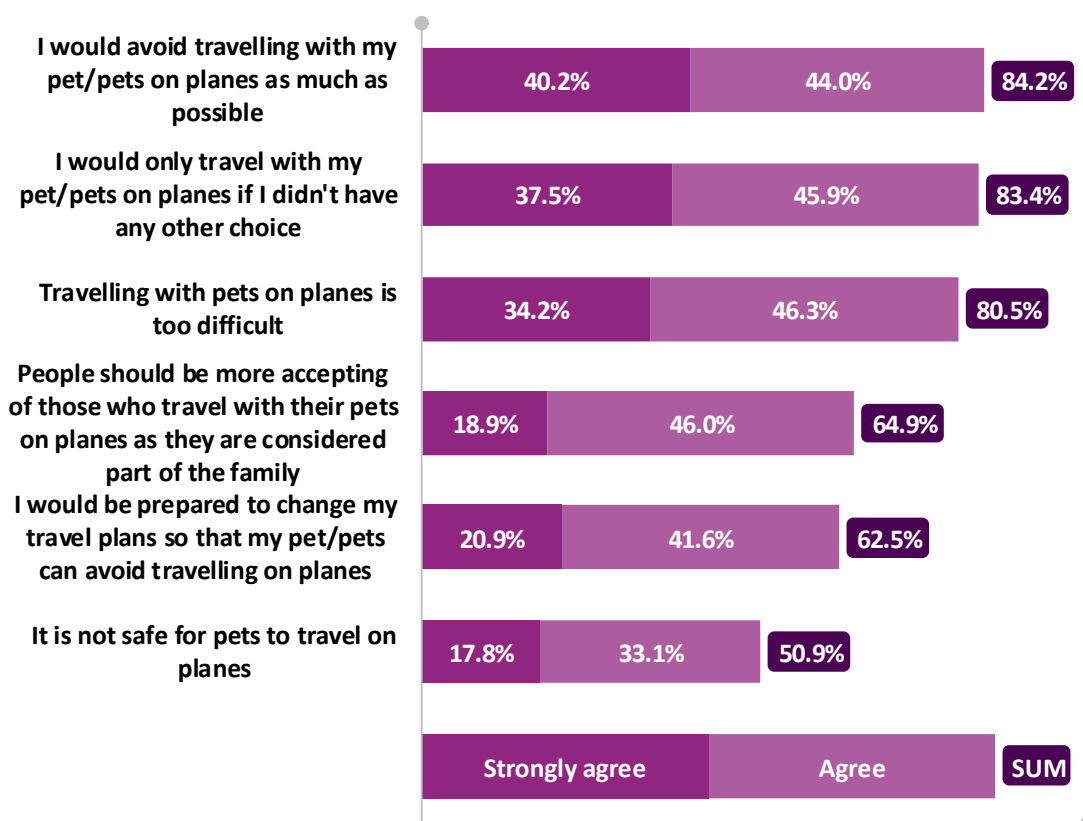
Source: CoreData - Real Pets Survey (October 2018)

Question: How likely are you to travel with your pet/pets on the following in the future?

If given the opportunity, similar proportions of respondents say they would travel with their pets on public transport (34.9%) or on planes (30.2%).

However, they are more reluctant to actually travel with their pets with one in five saying they are likely to travel on public transport (21.1%) and on planes (19.0%) with their pets in the future.

How much do you agree with the following statements about travelling with pets on planes?

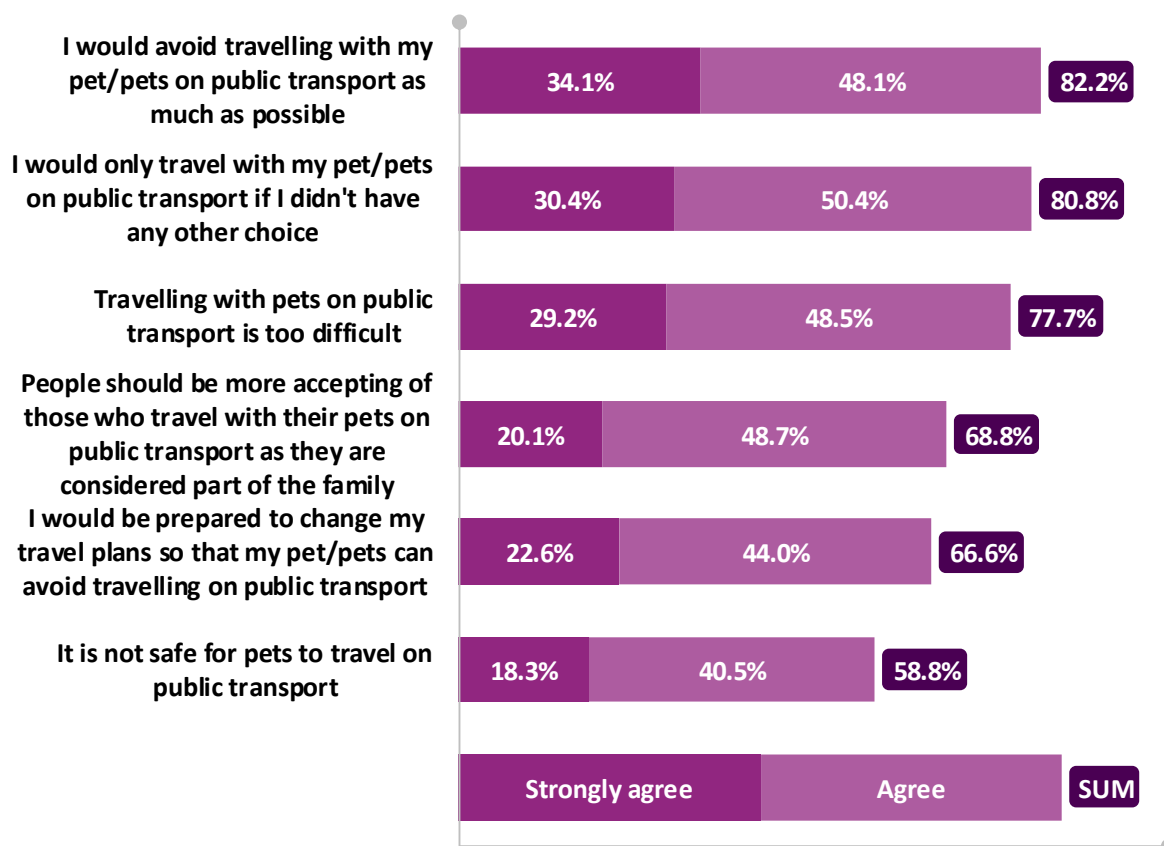


Source: CoreData - Real Pets Survey (October 2018)
 Question: How much do you agree with the following statements about travelling with pets on planes?

The vast majority of respondents say they would avoid travelling with their pets on planes as much as possible (84.2%) and would only travel with their pets on planes if they did not have any other choice (83.4%). Four in five (80.5%) also believe travelling with pets on planes is too difficult.

Most respondents are also prepared to change their travel plans so that their pets can avoid travelling on planes (62.5%) and believe it is not safe for pets to travel on planes (50.9%). However, close to two-thirds (64.9%) say people should be more accepting of those who travel with their pets on planes as they are considered part of the family.

How much do you agree with the following statements about travelling with pets on public transport?



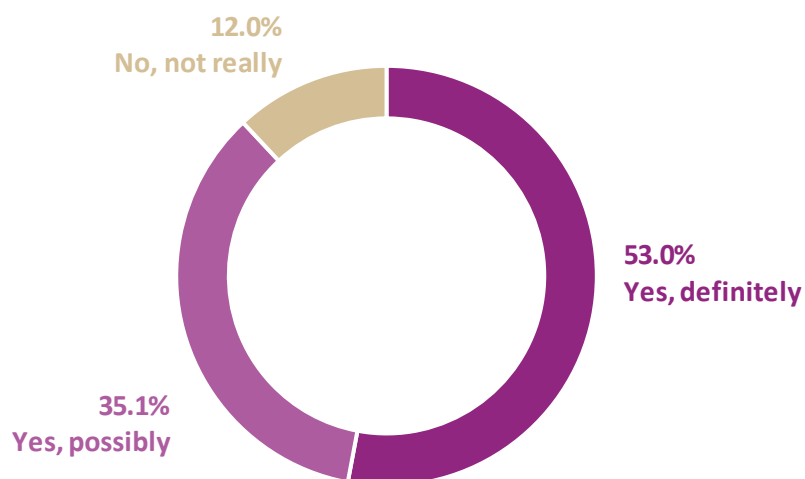
Source: CoreData - Real Pets Survey (October 2018)

Question: How much do you agree with the following statements about travelling with pets on public transport?

The vast majority of respondents say they would avoid travelling with their pets on public transport as much as possible (82.2%) and would only travel with their pets on public transport if they did not have any other choice (80.8%). More than three-quarters (77.7%) also believe travelling with pets on public transport is too difficult.

Many respondents are also prepared to change their travel plans so that their pets can avoid travelling on public transport (66.6%) and believe it is not safe for pets to travel on public transport (58.8%). However, more than two in three (68.8%) say people should be more accepting of those who travel with their pets on public transport as they are considered part of the family.

Would you be happy to adopt a rescue animal as a new pet?



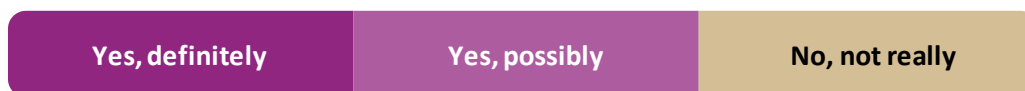
Source: CoreData - Real Pets Survey (October 2018)
 Question: Would you be happy to adopt a rescue animal as a new pet?

Should Australians ...?

Provide more support to organisations that focus on rescuing animals and finding them a suitable home



Be encouraged to adopt more rescue animals

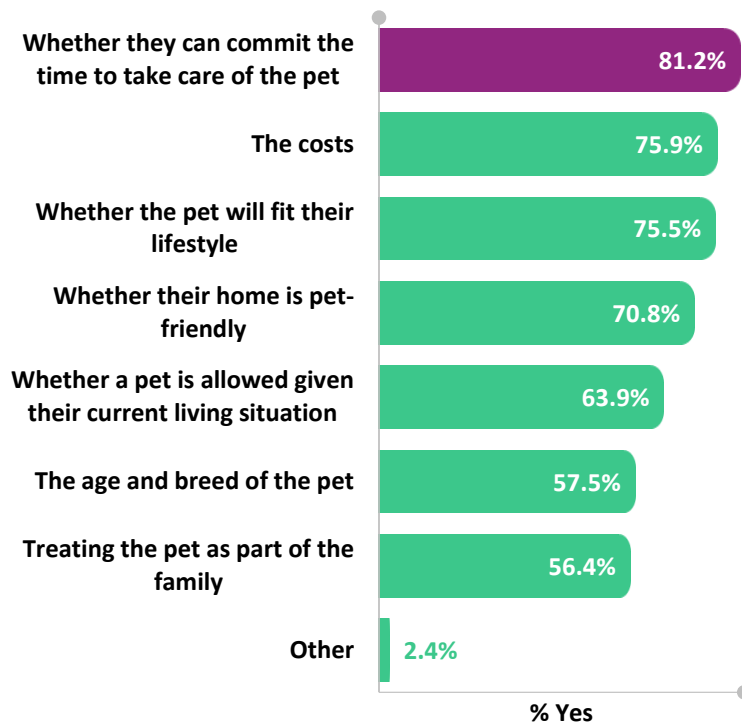


Source: CoreData - Real Pets Survey (October 2018)
 Question: Should Australians ...?

The vast majority (88.1%) of respondents say they would be happy to adopt a rescue animal as a new pet.

Nearly all respondents think Australians should be encouraged to adopt more rescue animals (96.2%) and to provide more support to organisations that focus on rescuing animals and finding them suitable homes (94.6%).

What do you see as the key considerations for people thinking about getting a pet for the first time?



*Multiple answers allowed

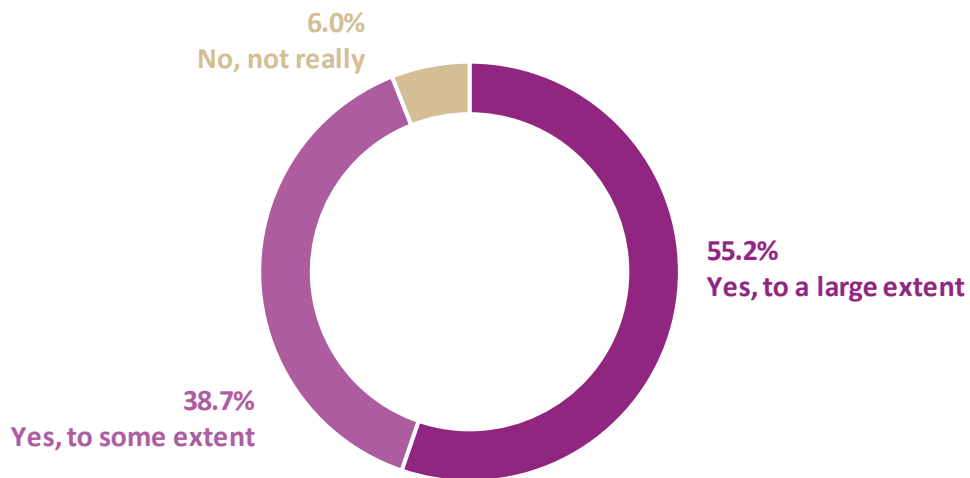
Source: CoreData - Real Pets Survey (October 2018)

Question: What do you see as the key considerations for people thinking about getting a pet for the first time?

More than four in five (81.2%) respondents say it is important for people thinking about getting a pet for the first time to consider whether they can commit the time to take care of the pet. Similar proportions think first-time pet owners should consider the costs (75.9%) and whether the pet will fit their lifestyle (75.5%) or if their home is pet-friendly (70.8%).

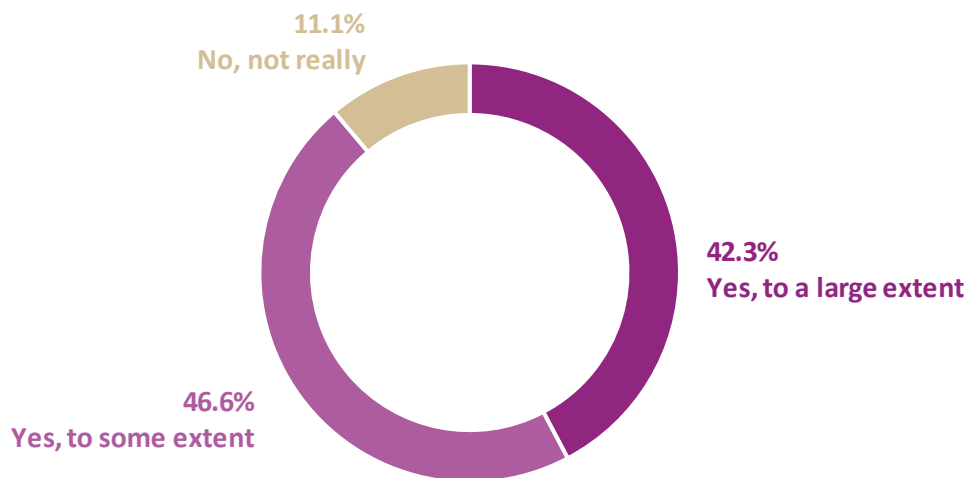
Other key considerations for first-time pet owners include assessing their current living situation on whether a pet is allowed (63.9%), treating the pet as part of the family (56.4%) and the age and breed of the pet (57.5%).

Compared to home owners, do you think it's more difficult for people to get a pet if they were a renter?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Compared to home owners, do you think it's more difficult for people to get a pet if they were a renter?

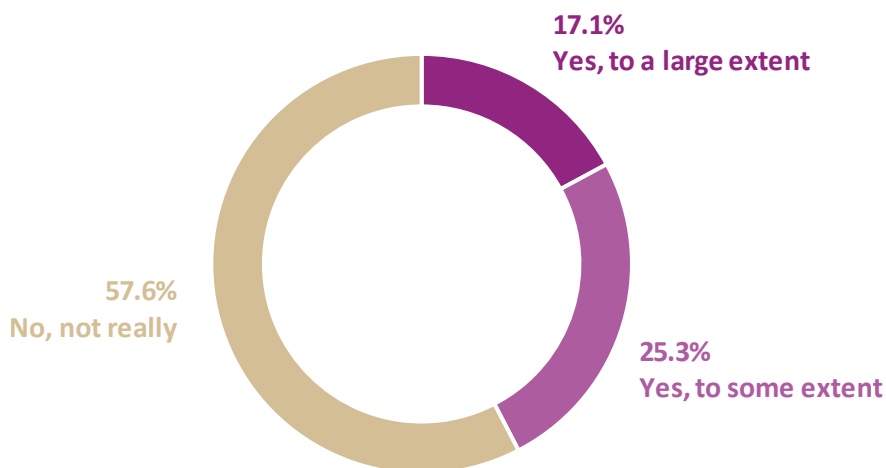
Compared to those living in a free-standing house, do you think it's more difficult for people to get a pet if they were living in an apartment or a townhouse/villa?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Compared to those living in a free-standing house, do you think it's more difficult for people to get a pet if they were living in an apartment or a townhouse/villa?

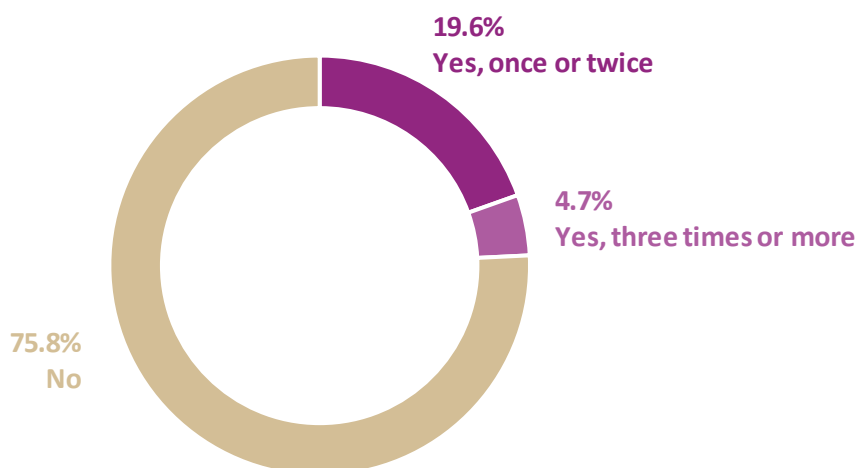
Almost all respondents think it is more difficult for people to get a pet if they were a renter compared to a home owner (93.9%). The vast majority (88.9%) say it is more difficult for people to get a pet if they were living in an apartment or a townhouse or villa compared to those who are living in a free-standing house.

Have you ever been held back from getting a pet in the past because of your living situation?



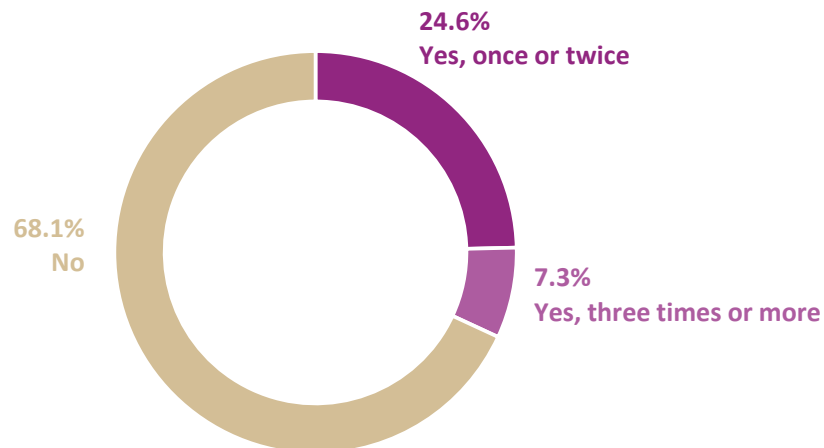
Source: CoreData - Real Pets Survey (October 2018)
 Question: Have you ever been held back from getting a pet in the past because of your living situation?

Have you ever hidden the fact that you have a pet from a landlord?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Have you ever hidden the fact that you have a pet from a landlord?

Have you ever discounted moving into a potential new property in the past based on attitudes towards pets which differed from yours?

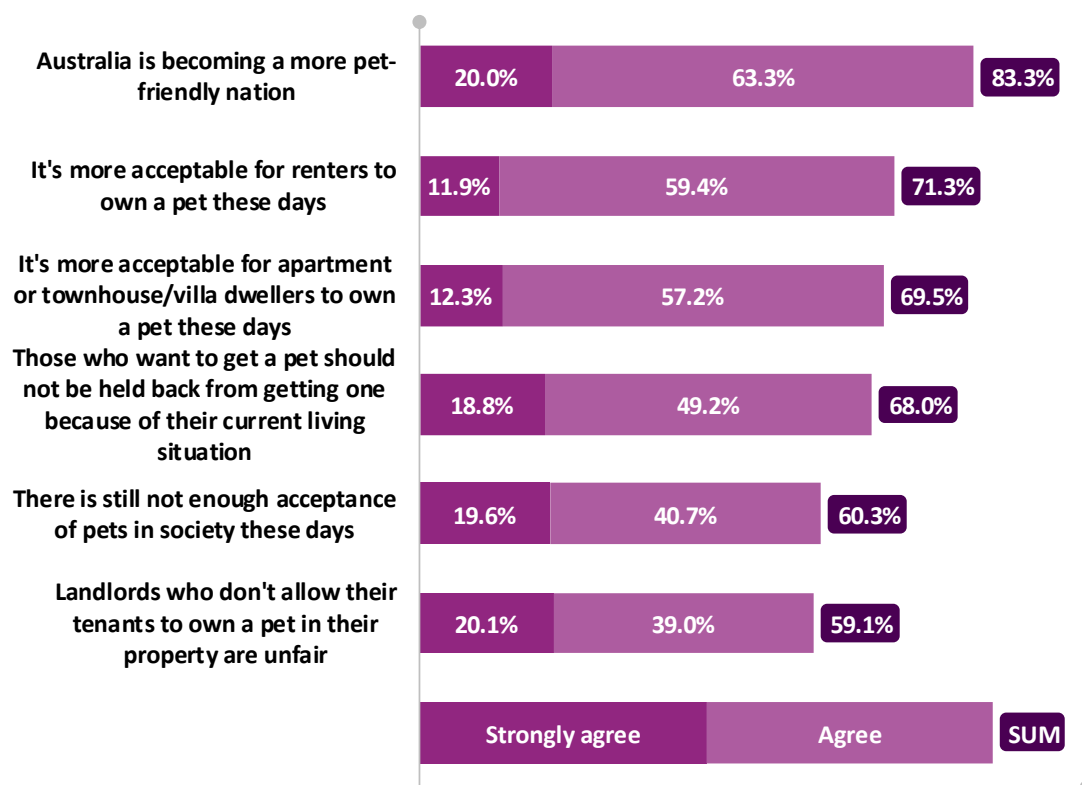


Source: CoreData - Real Pets Survey (October 2018)

Question: Have you ever discounted moving into a potential new property in the past based on attitudes towards pets which differed from yours?

More than two in five (42.4%) respondents say they have been held back from getting a pet in the past because of their living situation, while almost a quarter (24.3%) say they have hidden the fact they have a pet from a landlord. Close to a third (31.9%) say they have discounted moving into a potential new property in the past based on attitudes towards pets which differed from their attitudes.

How much do you agree with the following statements about owning a pet?



Source: CoreData - Real Pets Survey (October 2018)

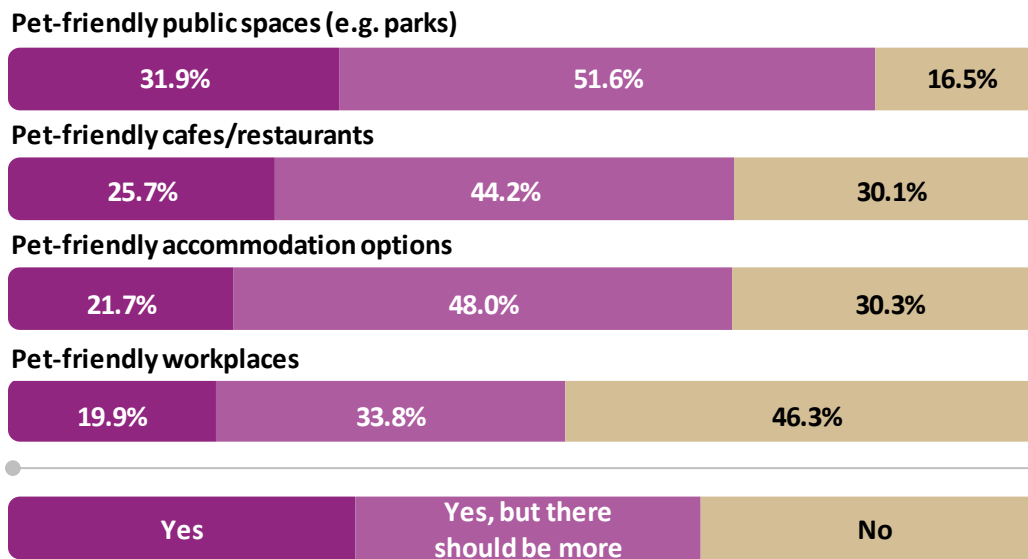
Question: How much do you agree with the following statements about owning a pet?

More than four in five (83.3%) respondents believe Australia is becoming a more pet-friendly nation. Most respondents also think it is more acceptable for renters (71.3%) and for apartment or townhouse/villa dwellers (69.5%) to own pets these days.

Many respondents also say that people who want to get a pet should not be held back from getting one because of their living situation (68.0%), while close to three in five (59.1%) say landlords who do not allow their tenants to own pets in their property are unfair.

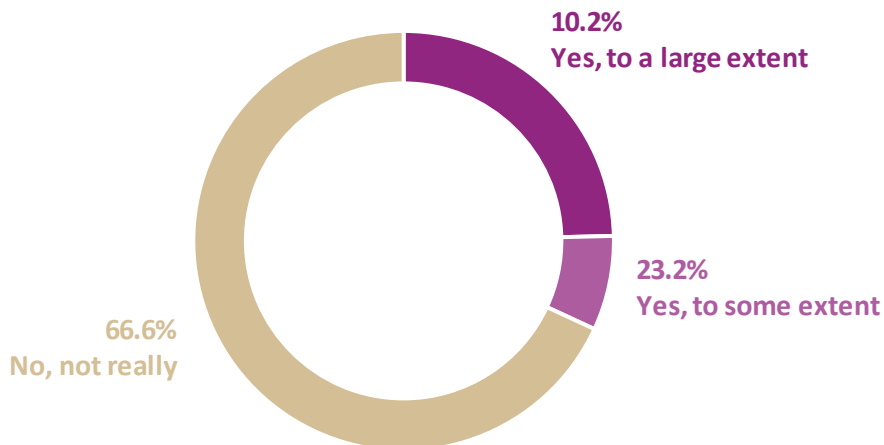
However, there are respondents who believe there is still not enough acceptance of pets in society these days (60.3%).

Do you think there is enough of the following in Australia?



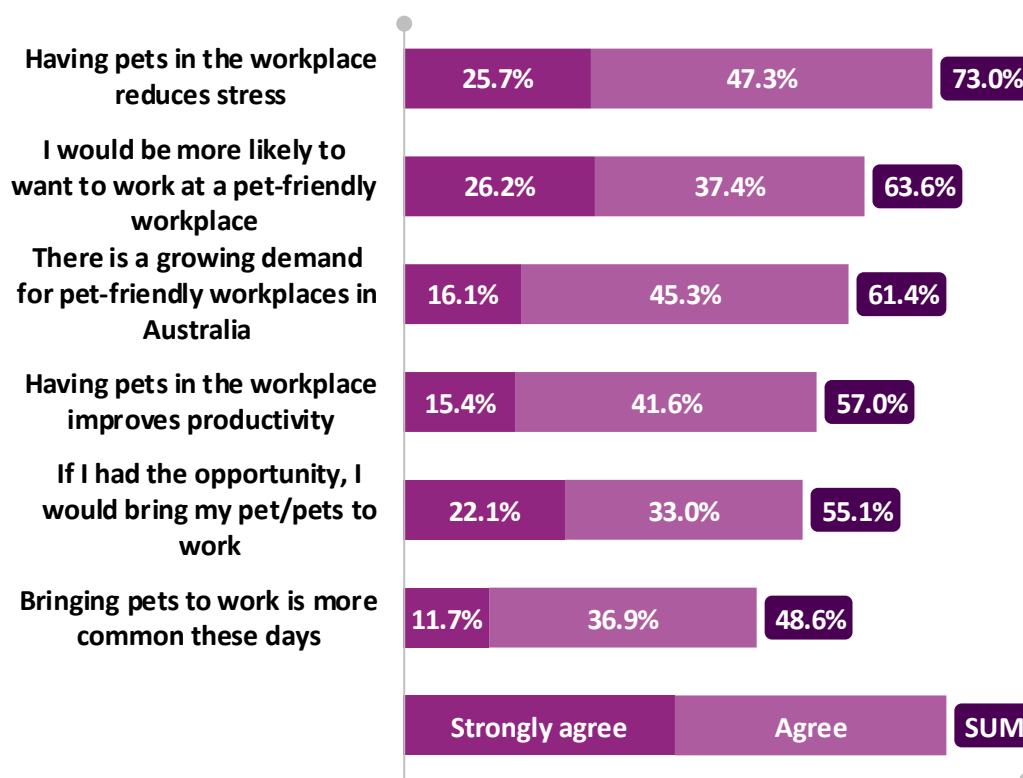
Source: CoreData - Real Pets Survey (October 2018)
 Question: Do you think there is enough of the following in Australia?

Would you say your workplace is pet-friendly?



Source: CoreData - Real Pets Survey (October 2018)
 Question: Would you say your workplace is pet-friendly?

How much do you agree with the following statements about pets and the workplace?



Source: CoreData - Real Pets Survey (October 2018)

Question: How much do you agree with the following statements about pets and the workplace?

The vast majority (83.5%) of respondents think there are enough or there should be more pet-friendly public spaces such as parks in Australia. Similar proportions say there are enough pet-friendly cafes/restaurants (69.9%) and accommodation options (69.7%) as well as pet-friendly workplaces (53.7%) across Australia.

However, only a third (33.4%) of employed respondents say their workplaces are pet-friendly. Many employed respondents believe having pets in the workplace reduces stress (73.0%) and improves productivity (57.0%). They also believe that there is a growing demand for pet-friendly workplaces in Australia (61.4%) and that bringing pets to work is more common these days (48.6%). Moreover, many respondents would be more likely to want to work at a pet-friendly workplace (63.6%) and would bring their pets to work if given the opportunity (55.1%).

DEMOGRAPHICS

Gender	
Female	51.1%
Male	48.9%
TOTAL	100.0%

State/Territory	
ACT	2.3%
NSW	21.2%
NT	1.5%
QLD	21.5%
SA	10.1%
TAS	6.5%
VIC	18.6%
WA	18.2%
TOTAL	100.0%

Pet Ownership	
Yes, cat(s) only	21.1%
Yes, dog(s) only	46.8%
Yes, cat(s) and dog(s)	21.1%
Yes, other type(s) of pet(s)	11.1%
TOTAL	100.0%

Marital Status	
Single	27.4%
Living with partner/married	60.3%
Separated/divorced	9.2%
Other	3.0%
TOTAL	100.0%

Number of Children	
One	27.4%
Two	39.8%
Three	20.2%
More than three	12.6%
TOTAL	100.0%

Living Arrangements	
Living alone (never had children)	11.4%
Living with flatmate(s) (never had children)	5.9%
Living with parents/siblings (never had children)	8.3%
Living with partner only (never had children)	15.0%
Living with your children (under 18 years) at home	22.0%
Living with your children (over 18 years) at home	8.4%
Living with your children (both over and under 18 years)	2.3%
Living alone (children have all left home)	8.3%
Living with partner only (children have all left home)	15.2%
Other	3.4%
TOTAL	100.0%

Work status	
Full-time paid employment	34.0%
Part-time paid employment	15.8%
Self-employed	5.4%
Casual employment	6.3%
Transitioning to retirement and working part time	1.1%
Fully retired	17.7%
Full-time home duties	5.4%
Unemployed/not in paid employment	7.3%
On a disability pension	3.6%
Other	3.4%
TOTAL	100.0%

Age	
29 years old & below	21.8%
30 - 39 years old	17.7%
40 - 49 years old	17.4%
50 - 59 years old	16.3%
60 years old & above	26.8%
TOTAL	100.0%

Generation	
Generation Y	21.1%
Generation X	46.8%
Baby Boomers	21.1%
Pre-Boomers	11.1%
TOTAL	100.0%

Education	
Primary	0.2%
Part of high school	9.0%
Completed high school	22.3%
Diploma or certificate qualification	35.4%
Degree qualification	20.7%
Postgraduate qualification	12.4%
TOTAL	100.0%

Wealth Segment	
Mass Market	60.3%
Mass Affluent	29.3%
Core Affluent	7.6%
HNW	2.7%
TOTAL	100.0%

Household Income	
\$50,000 or less	36.3%
\$50,001 to \$75,000	22.0%
\$75,001 to \$100,000	13.0%
\$100,001 to \$125,000	9.9%
\$125,001 to \$150,000	6.7%
\$150,001 to \$200,000	7.9%
\$200,001 to \$250,000	2.0%
\$250,001 to \$350,000	1.5%
\$350,001 or more	0.7%
TOTAL	100.0%

Investment Portfolio	
I have no investments	51.0%
\$50,000 or less	13.1%
\$50,001 to \$150,000	11.8%
\$150,001 to \$250,000	5.3%
\$250,001 to \$350,000	5.3%
\$350,001 to \$450,000	3.7%
\$450,001 to \$550,000	3.0%
\$550,001 to \$650,000	1.8%
\$650,001 to \$750,000	0.9%
\$750,001 to \$1 million	2.1%
More than \$1 million to \$3 million	1.4%
More than \$3 million to \$5 million	0.4%
More than \$5 million	0.2%
TOTAL	100.0%

Personal Income	
\$20,000 or less	19.8%
\$20,001 to \$30,000	18.7%
\$30,001 to \$40,000	12.6%
\$40,001 to \$50,000	9.3%
\$50,001 to \$60,000	8.5%
\$60,001 to \$70,000	8.0%
\$70,001 to \$80,000	8.8%
\$80,001 to \$90,000	3.1%
\$90,001 to \$100,000	3.4%
\$100,001 to \$125,000	4.6%
\$125,001 to \$150,000	1.4%
\$150,001 to \$200,000	1.3%
More than \$200,000	0.6%
TOTAL	100.0%

ABOUT COREDATA

CoreData Research is a global specialist financial services research and strategy consultancy. CoreData Research understands the boundaries of research are limitless and with a thirst for new research capabilities and driven by client demand; the group has expanded over the past few years into the Americas, Africa, Asia, and Europe.

CoreData Group has operations in Australia, the United Kingdom, the United States of America, Brazil, Singapore, South Africa and the Philippines. The group's expansion means CoreData Research has the capabilities and expertise to conduct syndicated and bespoke research projects on six different continents, while still maintaining the high level of technical insight and professionalism our repeat clients demand.

With a primary focus on financial services CoreData Research provides clients with both bespoke and syndicated research services through a variety of data collection strategies and methodologies, along with consulting and research database hosting and outsourcing services.

CoreData Research provides both business-to-business and business to- consumer research, while the group's offering includes market intelligence, guidance on strategic positioning, methods for developing new business, advice on operational marketing and other consulting services.

The team is a complimentary blend of experienced financial services, research, marketing and media professionals, who together combine their years of industry experience with primary research to bring perspective to existing market conditions and evolving trends.

CoreData Research has developed a number of syndicated benchmark proprietary indexes across a broad range of business areas within the financial services industry.

- Experts in financial services research
- Deep understanding of industry issues and business trends
- In-house proprietary industry benchmark data
- Industry leading research methodologies
- Rolling benchmarks

The team understands the demand and service aspects of the financial services market. It is continuously in the market through a mixture of constant researching, polling and mystery shopping and provides in-depth research at low cost and rapid execution. The group builds a picture of a client's market from hard data which allows them to make efficient decisions which will have the biggest impact for the least spend.



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