

Questionnaire Results regarding Pet Food, Goods, and Services in Japan: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a consumer survey on the domestic demand of products and services for pets with the following conditions:

1. Research period: February 2017
2. Research targets: 667 owners of dogs and/or cats nationwide (278 owners of dogs only, 314 owners of cats only, and 75 owners of both dogs and cats)
3. Research methodologies: Online survey

About Questionnaire regarding Foods, Goods, and Services for Pets

This questionnaire has been conducted to compare and analyze the purchase/usage statuses and important aspects in buying/using the following products and services, by age, gender and other attributes of owners, including whether the owners keep dogs only, cats only, or both:

- Pet foods: Pet food (staple) and between-meal snacks
- Goods for Pets (consumables): Sand for cats' toilet, Toilet sheets for pets, Deodorant for pets, Shampoo & conditioner for pets, Insecticide for pets, Spray for training pets, Moist tissues for pets, Body towels for pets, Dental goods for pets, Pet diapers, Excrement disposal packs for pets, and OTC medicines for pets
- Services for Pets: Beauty services for pets, Pet hotels, Training classes, Dog runs, Dog cafés, Pet sitters, Veterinary hospitals, Longterm-care homes for pets, Funeral services for pets

◆ Key Findings

■ **Price and Healthcare Functions are Important Factors in Buying Staple Pet Foods, and Tastiness in Snacks for Pets**

When asked about crucial elements in buying pet foods (staple) to 651 owners of dogs and/or cats who buy commercially-available pet foods, the responses selected were as follows, in decreasing order: Price (54.8%), Healthcare functions (50.5%), and Tastiness (49.3%). When asked about significant factors in buying between-meal snacks to 521 owners of dogs and cats who buy such snacks once a month or more, the responses in decreasing order were as follows: Tastiness (63.3%), followed by Price (51.4%), and Ingredients (37.2%). “Healthcare functions” was less important factor in buying snacks to pets compared with staple foods.

■ **With More Pets Kept Indoors, Excretion Care Supplies Including Sands for Cats and Toilet Sheets Became Indispensable**

When asked to 667 owners of dogs and/or cats nationwide about the use of goods for pets (consumables), the rate of choosing “Currently in use” was high in excretion care supplies such as “sand for cat’s toilet” accounting for 84.1%, and “Toilet sheets” 55.2%. It can be conjectured that those supplies have become indispensable as more owners keep their pets indoors. On the other hand, with regard to “Diapers for pets” and “Excrement disposal packs for pets”, the respective total rates of “Currently in use” and “Have used in the past but not anymore” accounted only for 20% at best.

■ **Services for Pets Were More Actively Used by Owners of Both Dogs and Cats Than Owners of Either of Dogs or Cats**

When asked to 667 owners of dogs and/or cats nationwide about the use of the services for pets, the rate of choosing “Currently in use” and “Have used in the past but not anymore” by the owners of both dogs and cats regarding the targeted services were higher than the owners of either dogs or cats only, except for “Beauty services for pets” and “Veterinary hospitals”. It can be conjectured that the owners of both dogs and cats are eager in using the services for pets.

◆ **Report format:**

Published report: “Analysis on Pet related Market Demands by Pet Owners 2017”

Issued on: May 31, 2017

Language: Japanese

Format: 193 pages in A4 format

Price: 100,000 yen (The consumption tax shall be additionally charged for the sales in Japan.)

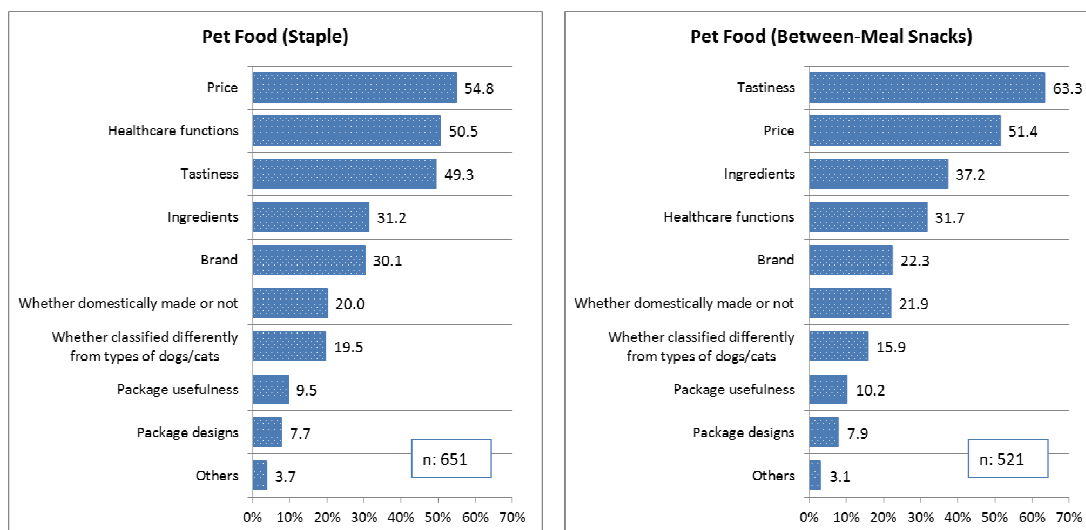
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■ **Figure 1: Deciding Factors in Buying Staple Foods and Between-Meal Snacks for Pets**

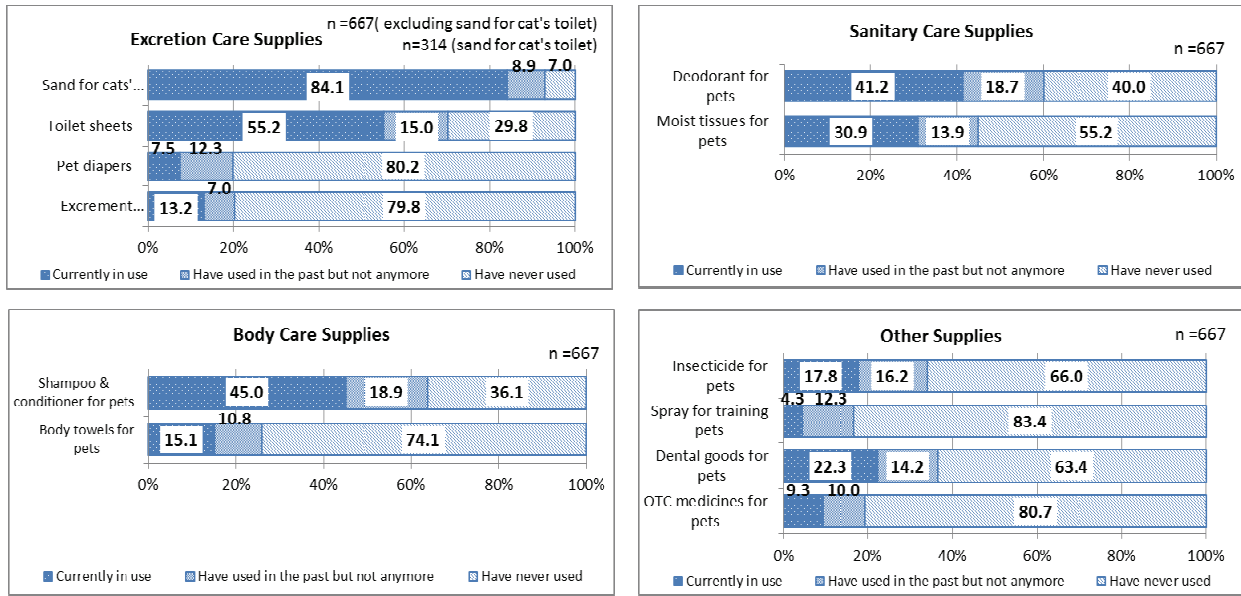


Survey by Yano Research Institute

Notes:

1. Research period: February 2017; Research targets: Out of 667 owners of dogs and/or cats nationwide, the survey of pet foods (staple) has targeted 651 owners who buy those pet foods commercially available, and the survey for pet snacks has targeted 321 pet owners who buy such snacks once a month or more; Research methodologies: Online survey, Multiple responses allowed.

Figure 2: Utilization of Goods for Pets (Consumables)

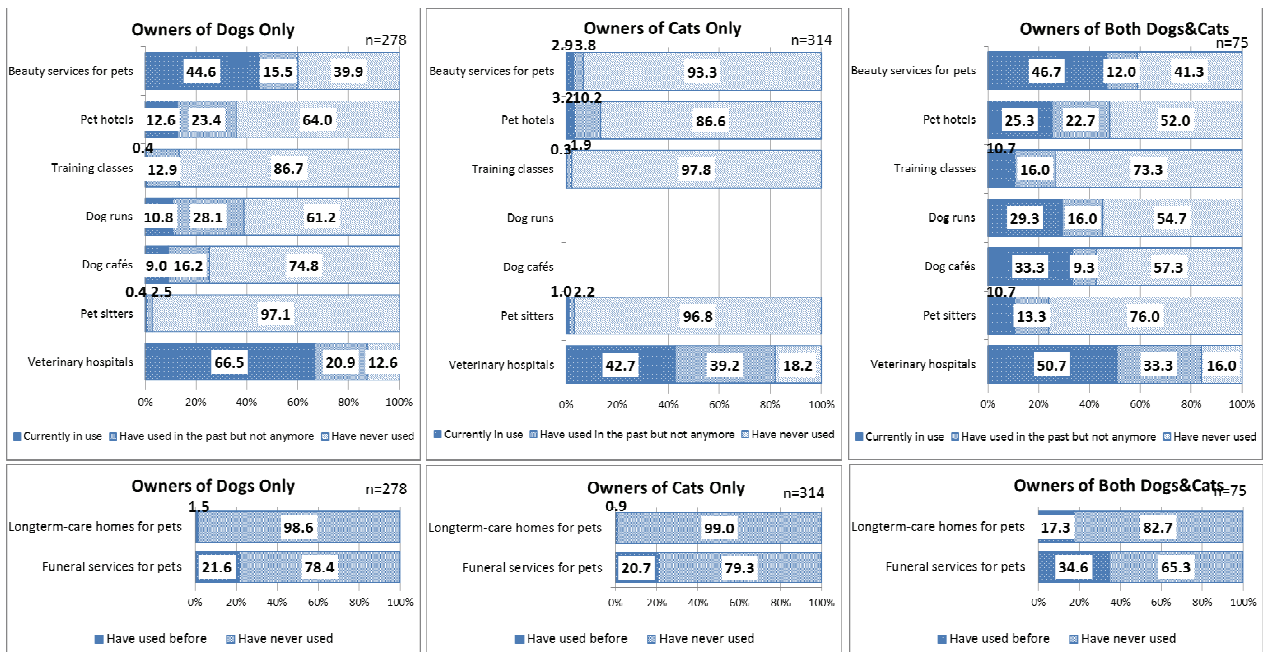


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Notes:

- Research period: February 2017; Research targets: Out of 667 owners of dogs and/or cats nationwide, the survey of sand for cats' toilet has targeted 314 owners of cats only; Research methodologies: Online survey; Single response allowed.

Figure 3: Utilization of Services for Pets By Owners of Dogs Only, Cats Only, and of Both Dogs and Cats



Survey by Yano Research Institute

Notes:

- Research period: February 2017; Research targets: Out of 667 owners of dogs and/or cats nationwide, 278 owners of dogs only, 314 owners of cats only, and 75 owners of both dogs and cats; Research methodologies: Online survey; Single response allowed.