Special Report Rapport spécial

The Business of Urban Animals Survey: The facts and statistics on companion animals in Canada

Terri Perrin

Abstract — At the first Banff Summit for Urban Animal Strategies (BSUAS) in 2006, delegates clearly indicated that a lack of reliable Canadian statistics hampers municipal leaders and legislators in their efforts to develop urban animal strategies that create and sustain a healthy community for pets and people. To gain a better understanding of the situation, BSUAS municipal delegates and other industry stakeholders partnered with Ipsos Reid, one of the world's leading polling firms, to conduct a national survey on the "Business of Urban Animals." The results of the survey, summarized in this article, were presented at the BSUAS meeting in October 2008. In addition, each participating community will receive a comprehensive written analysis, as well as a customized report. The online survey was conducted from September 22 to October 1, 2008. There were 7208 participants, including 3973 pet and 3235 non-pet owners from the Ipsos-Reid's proprietary Canadian online panel. The national results were weighted to reflect the true population distribution across Canada and the panel was balanced on all major demographics to mirror Statistics Canada census information. The margin for error for the national results is +/- 1.15%.

Résumé — Sondage sur les animaux urbains : Faits et statistiques sur les animaux de compagnie au Canada. En 2006, au premier Sommet de Banff pour les stratégies sur les animaux urbains (BSUAS), les délégués ont clairement indiqué que l'absence de statistiques canadiennes fiables entrave les efforts des leaders municipaux et des législateurs en vue de développer des stratégies sur les animaux urbains qui créent et maintiennent une collectivité saine tant pour les animaux de compagnie que pour les personnes. Afin de mieux comprendre la situation, les délégués municipaux au BSUAS et d'autres intervenants de l'industrie ont créé un partenariat avec Ipsos Reid, l'un des principales firmes de sondage au monde, afin de réaliser un sondage national sur «Les animaux urbains». Les résultats du sondage, qui sont résumés dans le présent article, ont été présentés à la réunion du BSUAS en octobre 2008. De plus, chaque collectivité participante recevra une analyse écrite complète, ainsi qu'un rapport sur mesure. Le sondage en ligne a été réalisé entre le 22 septembre et le 1er octobre 2008. Il y avait 7208 participants, incluant 3973 propriétaires et 3235 non-propriétaires d'animaux de compagnie provenant du panel canadien en ligne exclusif d'Ipsos-Reid. Les résultats nationaux ont été pondérés afin de refléter la répartition réelle de la population au Canada et le groupe a été équilibré pour toutes les données démographiques majeures afin de refléter les données du recensement de Statistique Canada. La marge d'erreur des résultats nationaux est de +/- 1,15 %.

(Traduit par Isabelle Vallières)

Can Vet J 2009;50:48–52

Introduction

Representatives from across Canada gathered in Banff, Alberta on October 16 to 18, 2008, for the 3rd Annual *Banff Summit for Urban Animal Strategies*. The Summit is a national consortium of community leaders representing animal control and legislative enforcement, animal welfare, animal health and wellness, and animal services. The annual Summit is an intensive 42-hour working session, facilitated by a panel of world-class speakers. Several regional Summits are held in various cities across Canada throughout the year.

The CVMA was a first-time sponsor of this year's event. Association delegates included CVMA president, Dr. Diane Frank and the executive director, Jost am Rhyn. "It is important for Canadian veterinarians to be represented by the CVMA at the table with animal health, welfare, and service stakeholders. The CVMA participated in the funding and development of the survey on Urban Animals to provide the profession with valuable insights," says Dr. Frank.

While the main focus of the 2008 Summit was industry collaboration, a much-anticipated highlight was the release of a new Ipsos-Reid survey: the Business of Urban Animals. More than 20 municipalities, animal-related businesses and organizations from across Canada contributed to survey costs and development. It was designed specifically to address issues that affect the companion animal services industry. A panel of experts,

Table 1. Canadian dog and cat population estimates

13 576 855 households in Canada
(Source: Statistics Canada 2006 Census)

35.5% of households have a cat	32.3% of households have a dog
↓	↓
4 820 085 households with cats	4 384 978 households with dogs
↓	↓
1.76 cats per household	1.38 dogs per household
↓	↓
8 510 021 cats in Canada	**6 070 783 dogs in Canada**

Table 2. Demographics of Canadian dogs and cats

	Cats	Dogs
Average age	5.7 years	5.9 years
< 1 year	8%	7%
1–3 years	33%	29%
4–7 years	35%	30%
8–10 years	11%	11%
10+	24%	22%

including CVMA representatives, Dr. Paul Boutet and Shaely Williams, formulated the questions.

The online survey was conducted from September 22 to October 1, 2008. It encompassed a total sampling of 7208 participants; including 3973 pet and 3235 non-pet owners from Ipsos-Reid's proprietary Canadian online panel. The national results were weighted to reflect the true population distribution across Canada and the panel was balanced on all major demographic information to mirror Statistics Canada census information. The margin for error for the national results is +/- 1.15%.

"The CVMA supported this initiative because we recognize that research of this nature is important to our members," says Shaely Williams, manager, Business Management Program, CVMA. "This research provides the statistics we need to better understand how pet owners feel about important topics – such as vaccinations, and spaying and neutering. It gives us the necessary tools to determine areas in which we need to improve in order to enhance the veterinary/client relationship and improve patient care."

The Canadian pet population

A total of 56% of Canadian households have at least one dog or cat. Most of the pet-owning respondents reported having cats only (23%), or dogs only (20%), while 13% had both species.

The survey also asked about ownership of other types of pets. Fish can be found in 12% of homes, birds 5%, and rabbits and hamsters in only 2%. Only 1% of homes have lizards, horses, guinea pigs, snakes, frogs, turtles, ferrets, or gerbils. Ownership of any other type of pet was less than 1%.

Although the statistics in this report represent a national perspective, the Business of Urban Animals Survey can also be broken down into various geographical regions. The more specific data provide municipalities with valuable insight as to whether or not their previous estimates, based on civic census data, are accurate. The general agreement among Summit delegates was that during an enumeration, some people may not honestly report dog and/or cat ownership for fear of being "caught" without a license or simply because they feel that this information is none of the government's business.

The main reasons for not having dogs or cats among the 45% of Canadian households that do not have them are:*

I don't want the responsibility/just don't want one	58%
I travel too much/they don't fit my lifestyle	41%
Health reasons	22%
Cost/too expensive	22%
Building I live in doesn't allow pets	12%

* Note: Total does not equal 100% because multiple answers were allowed.

Changing pet population

Regardless of the age of the pet when it was acquired, the average Canadian pet has been with their "family" for almost 5 years. Another 20% have been owned for 10 or more years.

The demographic profile of Canadian pets shows that 35% of cats and 33% of dogs are over 8 years old and could be considered "geriatric." Less than 8% are under 1 year old. This clearly indicates that veterinarians need to direct as much, if not more, attention to providing educational support for owners of senior pets, as they do for kittens and puppies. Canadian pets, like people, should be recognized as a "greying population."

Veterinary services

The CVMA believes it is vital to ensure that every client receives excellent service and a wealth of information each time they visit a veterinary clinic. In most cases, a veterinarian may only see a patient once a year.

A total of 50% of cats and 22% of dogs have not been to a veterinarian in the past 12 months. Of those that did receive veterinary care, 34% of all cats and dogs went only once, 13% of cats and 34% of dogs were seen 2 to 3 times. This may suggest that more promotion needs to be done on the importance and advantages of annual physical examinations, especially for cats.

The veterinary and animal welfare communities are doing a good job of promoting population control, with 79% of all cats and 69% of all dogs being spayed or neutered. (One can assume the disparity between dogs is directly related to the higher number of purebred breeding/show dogs versus purebred cats.) Of those animals that are spayed or neutered, only 76% of cats and 67% of dogs were altered by the age of 3 years.

Of those pets that were not already spayed or neutered when acquired, or the cost of surgery was not included in the purchase price of the pet, the average costs were $117 and $146 for altering a cat or a dog, respectively.

A total of 66% of respondents acknowledged that spaying and neutering was recommended by their veterinarian, was good value for the money spent, and was done with the best interests of the pet in mind. Interestingly, 16% of owners of "mostly indoor pets" believed that spaying and neutering was not necessary for their animals.

RAPPORT SPÉCIAL

Table 3. Spay/neuter costs

Amount spent to spay/neuter pet	Cats	Dogs
< $49	6%	2%
$50–$99	25%	13%
$100–$149	29%	25%
$150–199	11%	22%
$200 or more	7%	13%
Included with cost/already done	21%	25%

Table 4. Veterinary services received by age 3 – dogs and cats

	Cats		Dogs	
	< 1 year	1–3 years	< 1 year	1–3 years
Vaccinated for rabies	29%	75%	65%	92%
Spayed/Neutered	22%	76%	25%	67%
Microchipped or tattooed	12%	26%	22%	50%

Permanent identification

The lack of permanent identification, such as microchips and tattoos, is a major concern for animal welfare organizations, municipalities, and veterinarians across the country. Despite the fact that the average cost of a microchip is less than $40 and a tattoo is under $20, more than 90% of owners of cats not currently microchipped or tattooed were "unlikely" to request these services within the next 12 months. For owners of dogs that do not have permanent identification, 82% were unlikely to be microchipped, and 89% were unlikely to be tattooed within the next year.

Although 61% of respondents felt that a microchip was the best way to ensure a lost pet could be returned, only 26% reported that their veterinarian had recommended it, and 45% felt it was not necessary if a pet lives mostly indoors.

Considering tattoo programs are not available in all regions, it was not surprising that tattooing was even less popular. Only 14% reported that their veterinarian recommended tattooing; 27% felt it was the best way for a lost pet to be returned, and 35% felt it was not necessary for a pet that spent most of its time indoors.

Pet insurance

Pet insurance is another area of potential concern. While 52% of respondents "knew a little about pet insurance," only 2% of cat owners and 4% of dog owners had actually purchased pet insurance, and 21% had never even heard of it.

Of those who currently have pet insurance, the average monthly cost is less than $35. That being said, only 40% felt it provided "peace of mind," 46% felt it "provided financial protection," and 51% said that it "protects against the risk of expensive pet medical bills."

While these findings may indicate a need for a marketing campaign to better promote pet insurance, 80% of pet owners felt, should their pets become ill, they would be able to cover the cost of treatment without insurance.

Cost of pet ownership

There are several ways to analyze the statistics relating to the annual cost of pet ownership. It was interesting to compare results from the national Business of Urban Animals survey with "actual costs," as determined by the Ontario Veterinary Medical Association (OVMA) for the province of Ontario.

Despite the regional differences, and the fact that annual costs of veterinary care vary dramatically depending on the life stage of the pet, the Ipsos-Reid statistics came close to mirroring the numbers provided by the OVMA. Not only does this provide a measure of comparison, it also validates the accuracy of the Business of Urban Animals Survey results.

Note: For comparison purposes, the OVMA's estimated cost of professional dental care was removed because the OVMA's data were based on an *adult cat or dog*, while those of the Ipsos-Reid survey were for cats and dogs *of all ages*.

Acquiring new pets

Only 3% of the non-pet households did not currently have a pet because their previous pet had died and they were not ready for another one. These respondents would most likely be included in the 15% of Canadians who hope to acquire a new pet within the next 12 months. Most respondents were likely to buy a dog (46%), fish (31%), or a cat (21%).

With cats, it can be expected that 65% will be obtained from friends or relatives, adopted as strays, acquired free of charge through an advertisement, or will be offspring of a cat already owned. About 9% will be purchased from a pet store.

Less than 24% of cats are purchased from reputable sources: breeders (5%), animal shelters (17%), or veterinarians (2%). The average price for a cat was $53.

As indicated by these statistics, the general consensus of Summit delegates was that most cats and kittens are going to new homes in which the owners have not been educated about the importance of vaccinations, de-worming, spaying and neutering, and other feline health concerns. These "missed opportunities" may be a major contributing factor to the on-going cat overpopulation crisis, as well as incidences of disease in some regions.

Almost half of all dogs are acquired from reputable sources: breeders (35%), animal shelters (13%), or veterinarians (< 1%). A total of 10% were purchased from pet stores. The average purchase price for a dog was $286.

It is interesting to note that 3% of dogs and 11% of cats were "offspring of a pet I already own." Again, this indicates that there is more uncontrolled breeding of cats than of dogs. It could be assumed that some of theses litters (more so with dogs) were produced as a result of a planned breeding program, but this would represent a very small percentage of the sample.

Pet services information

While "word-of-mouth" (30%) and "a visit to the location where it (the pet) came from" (25%) still remain the most popular methods for people to acquire new pets, less than 5% of cats and 14% of dogs were obtained from information found on the Internet. A very small number of respondents selected "classified ads" or "advertisement." For 33% of cats and 14% of dogs, respondents selected "other sources."

Table 5. Veterinary services ever received – dogs and cats of all ages

	Cats	Dogs
Spayed/neutered	79%	69%
Microchipped	12%	25%
Tattooed	11%	24%
Vaccination in past 3 years (other than rabies)	56%	79%
Rabies vaccination	76%	89%
Never vaccinated	25%	14%
None of the above	19%	14%

While they may not use the Internet to help buy a new pet, 40% of Canadians are going "online" to find information about pet care and pet services; 45% are also consulting their veterinarian. It was surprising to note that only 1% consulted with their breeder/groomer or pet trainer. Television and radio, pamphlets and brochures, magazines and newspapers were also identified as important sources of information. (Multiple answers to this question were allowed.)

Kitty's reputation has gone to the dogs

The Business of Urban Animals Survey revealed some interesting statistics relating to cats.

"The numbers clearly indicate cats are not always valued as much as dogs," says David Webb, associate vice-president, Ipsos Reid. "In almost all categories covered by this survey, dogs receive better care than cats. This was interesting, considering more Canadians own cats than any other type of pet."

There are 8.5 million cats in 36% of Canadian households – half of them do not receive annual veterinary care and less than 25% have a tattoo or microchip. More than 40% either haven't been vaccinated in the last 4 years or have never been vaccinated at all.

Those cats that were taken to a veterinarian within the past 12 months went an average of 1.6 times and received an average of $294 in veterinary services. Dog owners shelled out an average of $451 for 2.1 visits.

Of the 21% of cat owners with intact (non-spayed or neutered) cats, more than half reported that they were "unlikely" to have their cats altered within the coming year. The average age of these intact cats is 3.2 years. This means approximately 15% of Canada's 8.5 million cats may produce unwanted kittens within the next 12 months.

Summit delegates were not surprised by this information. Many expressed concern that, despite on-going efforts to educate the public, some people just don't seem to care about the alarming cat over population problem in Canada.

Forget about the survey results for a second and consider the mathematics of Mother Nature. Assume half of these 1.27 million unaltered cats are females, producing at least 2 litters of 5 kittens every 12 months. This adds another 6.35 million cats to an already overcrowded feline pool.

Some cat owners' complacency about cat care may also stem from the fact that 66% of Canadian cat owners obtained their pets free of charge and, therefore, may be less willing to invest any money in their care. Dog owners, on the other hand, spend an average of $286 to purchase their canine companions.

Table 6. A comparative analysis of the cost of dog and cat care (Figures are based on average costs in Ontario. Numbers are rounded.)*

Cats		
Service (annual cost)	BUAS	OVMA
Veterinary care	$294[a]	$287[b]
Kitty litter	$100[c]	$91
Food	$372	$306
Collars, leashes, toys, and miscellaneous supplies	$53	$36
Pet insurance	$360	$270
Total annual cost of cat care[d]	**$1179**	**$990**

[a] BUAS: Based on the 50% of owners who took cats (of all ages) to a vet in the past 12 months.
[b] OVMA: Based on a 4.5 kg adult cat, includes annual vaccinations, fecal exam, wellness profile and flea treatment. The average $471.45 cost of professional dentistry estimate by the OVMA was excluded from this comparison.
[c] Estimated and not from the Ipsos Reid or OVMA.
[d] Considering less than 10% of Canadian cats are licensed, cost of licensing is excluded.

Dogs		
Service (annual cost)	BUAS	OVMA
Veterinary care	$451[a]	$360[b]
Food	$514	$510
Collars, leashes, toys, and miscellaneous supplies	$53	$36
Pet insurance	$408	$455
Licensing	$39	$25
Total annual cost of dog care	**$1519**	**$1386**

[a] BUAS: Based on the 78% of owners who took dogs (of all ages) to a vet in the past 12 months.
[b] OVMA: Based on a 18 kg adult dog, includes annual vaccinations, fecal exam, wellness profile and flea/heartworm treatment and testing. The average $471.45 cost of professional dentistry estimate by the OVMA was excluded from this comparison.
* Osborne D. Focus magazine. Ontario Veterinary Medical Association, 2008.

"An individual's views on the value of cats versus dogs may also be affected by how government appears to place more value on dogs," says Joanne Hahn from the City of Calgary Animal & Bylaw Services. "Municipalities have required dogs to be licensed for decades, but it is only within the last 5 years or so that the concept of cat licensing has been introduced. At present, less than a dozen cities and towns in Canada have a successful cat licensing program."

"If the Business of Urban Animals Survey proves anything," says Larry Evans, president, PetLynx Corporation, "it is that society really needs to step it up a notch when it comes to cats. They haven't achieved the status or recognition in our communities that can protect them from the perils they face. Until each community accepts the cat problem, understands the role they play, and owns the solution, cats will continue to be treated like disposable objects."

Conclusion

In the future, the CVMA will continue to support initiatives such as the Banff Summit for Urban Animal Strategies as the Association believes the outcomes, such as the results of the Business of Urban Animals Survey provides its members with relevant information and fulfills the association's mission as the national body serving and representing the interests of the veterinary profession in Canada.

Acknowledgments

The CVMA and the author thank PetLynx Inc., for hosting the Banff Summit for Urban Animal Strategies in Banff, Alberta. We also thank the organizations that helped sponsor this event: CDMV Inc., Iams, Petsecure, Pet Smart Charities, and the Pet Industry Joint Advisory Council of Canada.

CVJ