

A global, quantitative study of 19,187 pet owners and 1,512 veterinarians across five continents and ten countries.







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STRONGER HUMAN-ANIMAL BONDS

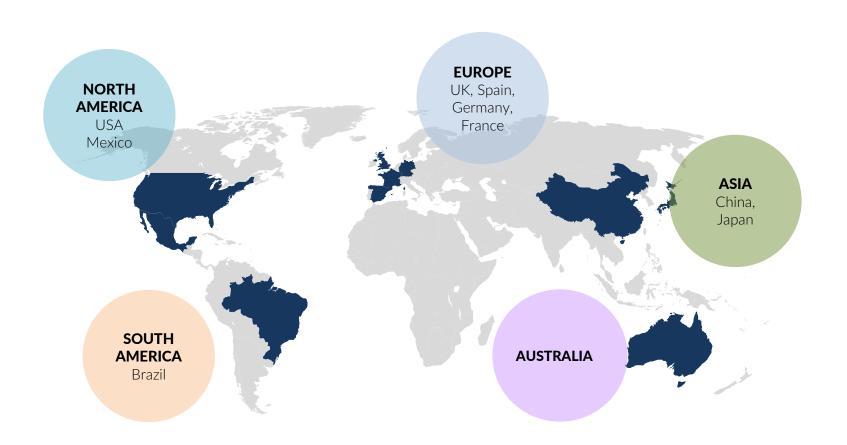
The potential impact on pet health & care





GEOGRAPHICAL COVERAGE AND SAMPLE DETAILS

Fieldwork conducted in June/July 2021 for countries in wave 1 (UK, USA, Germany, Spain, France, Brazil, China and Japan), March/April 2022 for wave 2 (Mexico) and June/July 2023 for wave 3 (Australia)



Veterinarian survey

- Total sample size n=1,512
- Small animal veterinarians (≥ 70% of their time treating cats and dogs)
- Mixture of owners/partners and employees
- Nationally representative as far as possible (gender, age, region)

Pet owner survey

- Total sample size n=19,187
- Owner of cat and/or dog
- Not currently working in market research or veterinary / animal health
- Primary person responsible for the pet's care
- Nationally representative as far as possible (gender, age, region)

Understanding the human-animal bond

A global look at the nature and measurement of the human-animal bond through the HABSCORE scale, a science-based tool developed specifically for this project.



HABSCORE THEORETICAL FRAMEWORK

OWNER-FOCUSED

(How pet owner defines his/her own role in the relationship)

PET-FOCUSED

(How pet owner defines the pet's role in the relationship)

FEELINGS-LED (Automatic responses)

ATTACHMENT

The emotional connection the owner feels to the pet

HUMANIZATION

Empathic attributes owner projects onto the pet

ACTION-LED (Reflective actions)

COMMITMENT

The changes/sacrifices an owner is prepared to make to accommodate their pet

INTEGRATION

The extent to which the pet is integrated in the owner's everyday life

ATTACHMENT

My pet and I have a close relationship
I miss my pet when I'm away from him/her
My feelings toward people are affected by the way they react
to my pet

HUMANIZATION

I believe my pet is my best friend
My pet is part of my family
My pet understands how I'm feeling
I celebrate my pet's birthday

COMMITMENT

Nothing would ever convince me to give up my pet I would make major life changes if necessary, to accommodate my pet If my pet needed extensive veterinary care, I would pay whatever it takes

I would take any intervention necessary to prevent my pet from undergoing pain and suffering

INTEGRATION

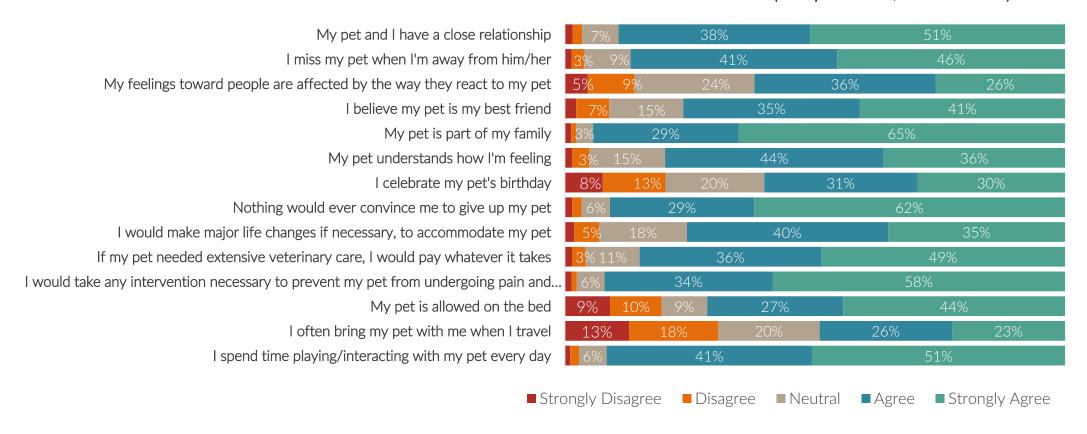
My pet is allowed on the bed
I often bring my pet with me when I travel
I spend time playing/interacting with my pet every day



OVERVIEW OF STATEMENT RESULTS GLOBALLY

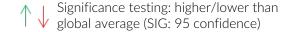
While there were a few statements of a more polarising nature – particularly around Integration – agreement was generally high across the board. All pet owners in the survey were given a HABSCORE based on their responses to these statements.

HABSCORE statements (% of pet owners, Total countries)

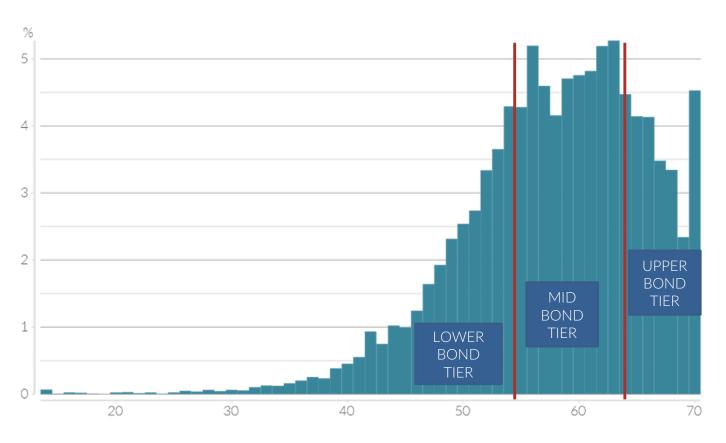


HABSCORE STATEMENT BREAKDOWNS BY COUNTRY





OVERVIEW OF SCALE DISTRIBUTION AND GROUPING OF PET OWNERS



HABSCORE GLOBAL AVERAGES

All pets: 57.5

Dogs: 58.1 Cats: 56.6

HABSCORE frequency distribution (scale range: 14-70)

HOW AN OWNER DESCRIBES THEIR PET IS A STRONG INDICATOR

"Family Member" and "Like a Child" were the most common descriptors for how owners think about their pets across all countries. Looking at the average HABSCORE by descriptor, we can see an ascending pattern.

How owner thinks of their pet (% of pet owners, all countries) versus HABSCORE of owners in each group



Q4. To what extent do you agree with the following statements about #PETTAG1#? Q2. Which of the following best describes how you think about [PET NAME]? Base: All pet owners (n=19.187)

The impact of the human-animal bond on pet owner health

This section describes how the human-animal bond impacts human health from both a physical, mental and social perspective.



89%

of owners say that having a pet has impacted their health (physically or mentally) positively

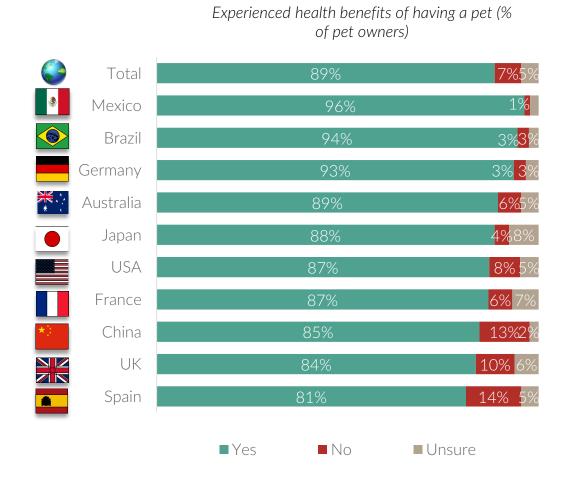
98%

DAYSSEYA

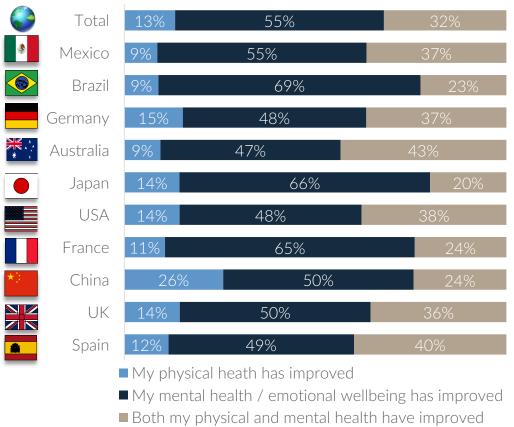
...this figure increases to a staggering 98% when that same question is asked in an indirect manner

THE VAST MAJORITY OF OWNERS HAVE EXPERIENCED HEALTH BENEFITS

89% of the owners in this study thought that having a pet has impacted their health (physically or mentally) in a positive way.







Q24. Overall, would you say that having a pet has impacted your health (physically and/or mentally) in a positive way?

Q25. You said that having a pet has impacted your health positively. How?

Base: All Pet Owners (n=19,187)

WE ALSO ASKED THIS SAME QUESTION IN AN INDIRECT MANNER...

Only 2% of pet owners said that none of these statements applied to them – which means that 98% are experiencing a positive impact on their health in one or more ways



67%

"My pet makes me <u>feel happy</u>"



43%

"Caring for my pet gives me a sense of purpose"



63%

"My pet adds to my happiness"



40%

"I believe loving my pet helps me stay healthy"



51%

"My pet comforts me when I'm feeling sad"



36%

"My pet helps me be more physically active"



48%

"My pet has made me feel **less lonely**"



17%

"My pet has helped me get to know others in my community"



48%

"My pet **calms me down** when I'm agitated or stressed"



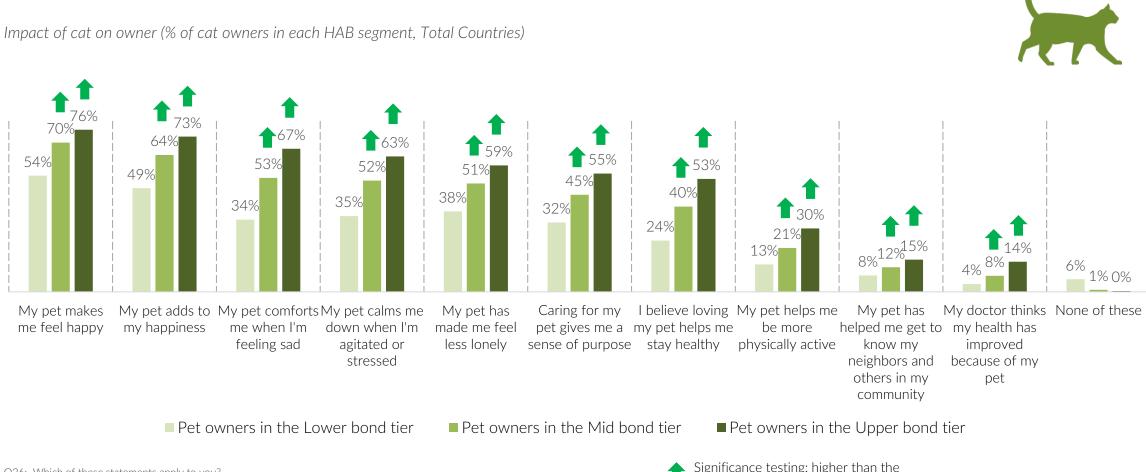
8%

"My doctor thinks my health has improved because of my pet"



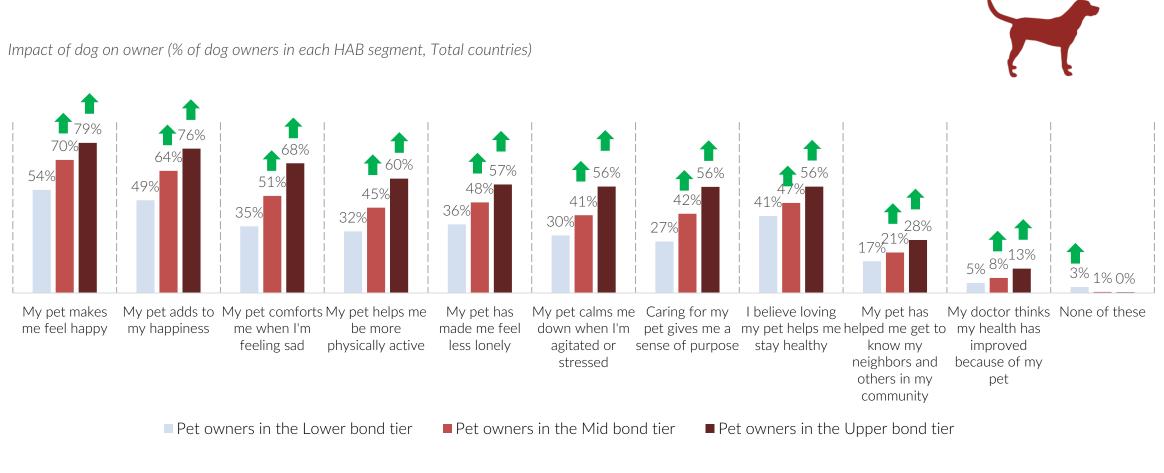
THE STRENGTH OF THE BOND DIRECTLY CORRELATES TO HEALTH BENEFITS

Cat owners in the mid and upper bond tiers consistently reported seeing health benefits to a greater extent than those in the tiers below them.

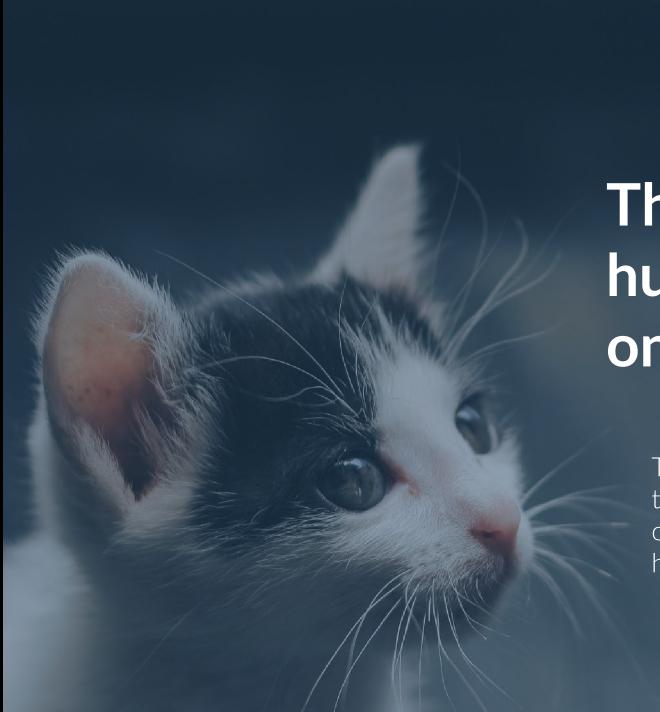


THIS SAME PATTERN WAS OBSERVED AMONG DOG OWNERS

Dog owners in the mid and upper bond tiers consistently reported seeing health benefits to a greater extent than those in the tiers below them.



Q26: Which of these statements apply to you? Base: All Dog Owners (n=10,925)



The impact of the human-animal bond on pet welfare

The section describes the link between the human-animal bond and core pet owner behaviours in managing their pet's health.



STRONGLY BONDED OWNERS HAVE A HIGHER VET VISIT FREQUENCY

2+ Annual Visits: 71% - Higher Bond Tier

62% - Mid Bond Tier

45% - Lower Bond Tier

Number of times visiting a veterinarian in a normal /pre-Number of times visiting a veterinarian during a pandemic pandemic year (% of pet owners, Total countries) year (% of pet owners, Total countries) 9% 10% 15% ■ Five times a year or more 8% 11% 12% ■ Four times a year 13% 19% 15% 23% ■ Three times a year 22% 16% 25% 26% Twice a year 26% 31% Once a year 32% 27% Less than once a year 18% 22% 14% 13%

■ I have never taken him/her to

see a veterinarian

Owners in Lower bond tier

7%

Owners in Mid bond tier

9%

3%

Owners in Upper bond tier

Owners in Lower bond tier

14%

Owners in Mid bond tier

8%

Owners in Upper bond tier

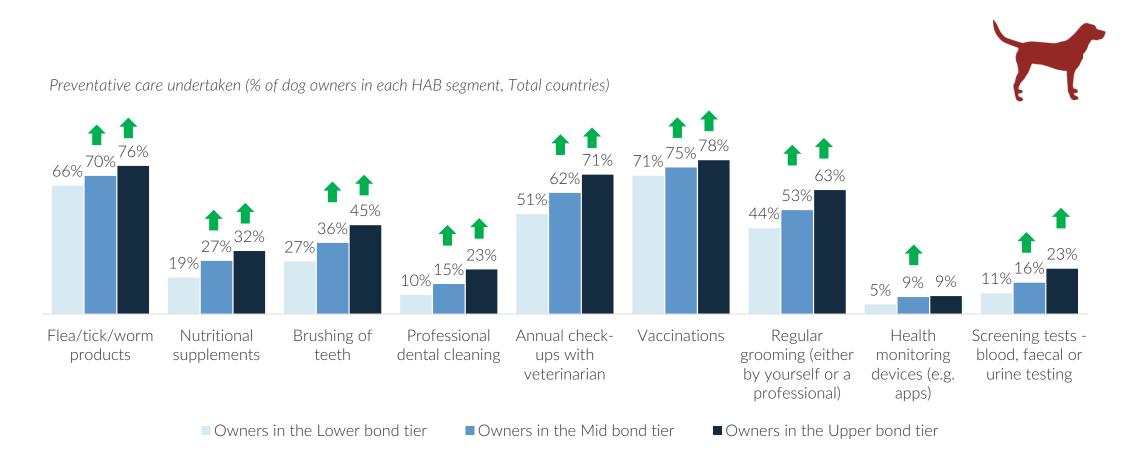
11%

6%



STRONGLY BONDED OWNERS DO MORE PREVENTATIVE CARE

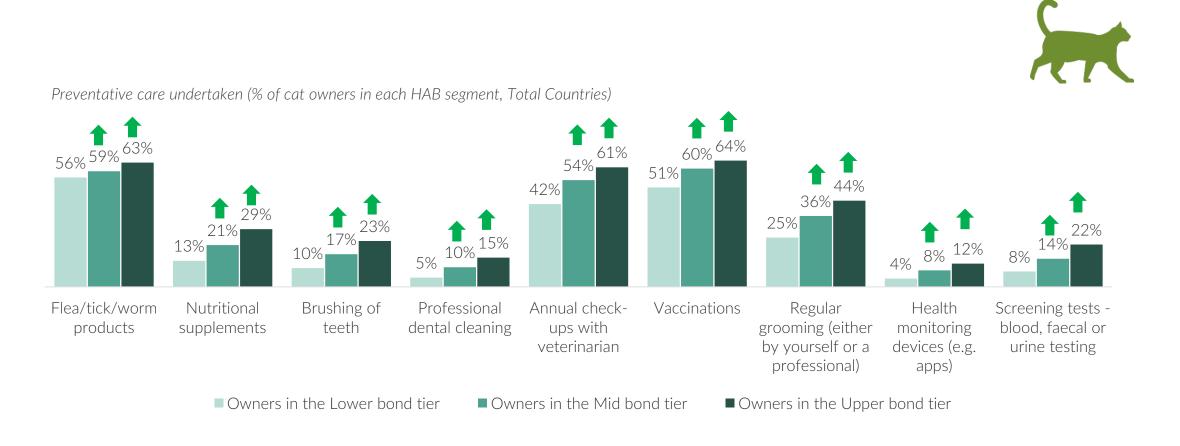
There is a clear correlation between the strength of the human-animal bond and the propensity to engage in preventive care.





THIS PATTERNS HOLDS TRUE FOR ALSO CAT OWNERS

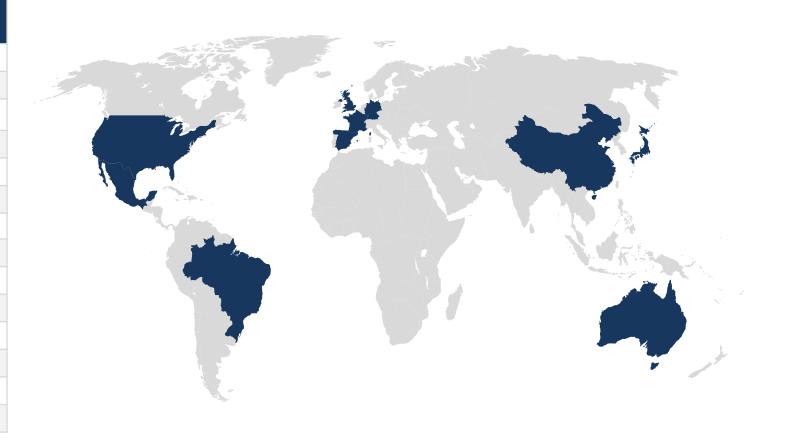
Strongly bonded group being significantly more likely to use preventative care measures.



...DOES THIS ALSO HOLD TRUE WHEN IT COMES TO THERAPEUTIC CARE?

To test this, we first asked over 19,000 pet owners who participated in this study whether their pet had experienced any of the following symptoms in the past 12 months. Global results by species can be seen in the table below.

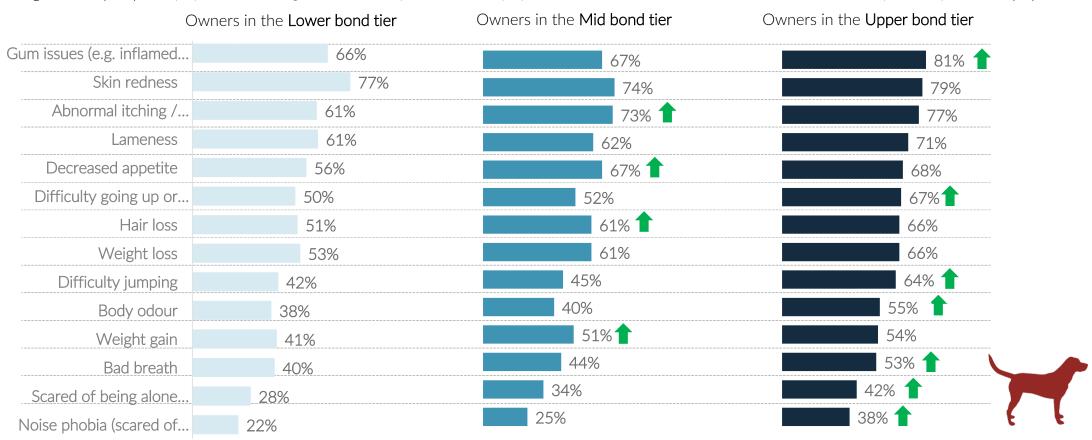
Incidence rate (% of pets showing symptoms in the past 12 months)	Dogs	Cats
Hair loss	16%	14%
Weight gain	16%	11%
Noise phobia	13%	13%
Bad breath	15%	8%
Separation anxiety	14%	9%
Abnormal itching / scratching	11%	6%
Decreased appetite	7%	6%
Body odour	7%	4%
Difficulty jumping	7%	3%
Weight loss	4%	6%
Difficulty going up or down stairs	7%	3%
Gum issues	5%	2%
Skin redness	4%	3%
Lameness	4%	2%



HOW MANY DOG OWNERS CONSULTED A VET FOR THEIR SYMPTOMS?

We asked those dog owners who <u>did</u> notice symptoms whether they had consulted a veterinarian for those symptoms. Cross-referencing these results with owners' HABSCOREs, the propensity to seek veterinary advice and care increases significantly with the strength of the bond.

Seeking veterinary help for symptoms (% of dog owners whose pets exhibited symptoms in last 12 months who consulted a veterinarian specifically for that symptom)



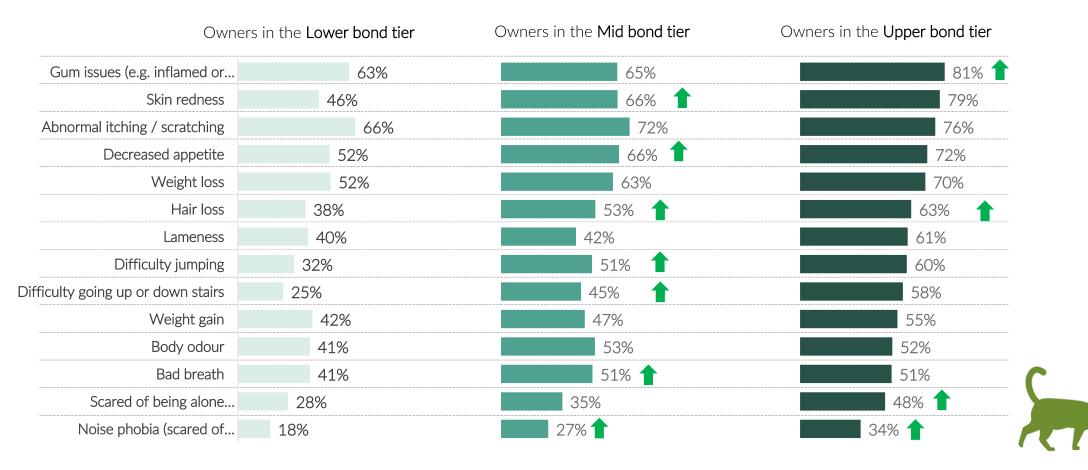


Base: All Dog Owners (n=10,925)

STRONGLY BONDED CAT OWNERS ALSO HAD A HIGHER **PROPENSITY TO SEEK CARE**

The same positive impact on behaviour was observed among cat owners, those in the higher HABSCORE tiers were significantly more likely to seek care from a veterinarian for specific symptoms.

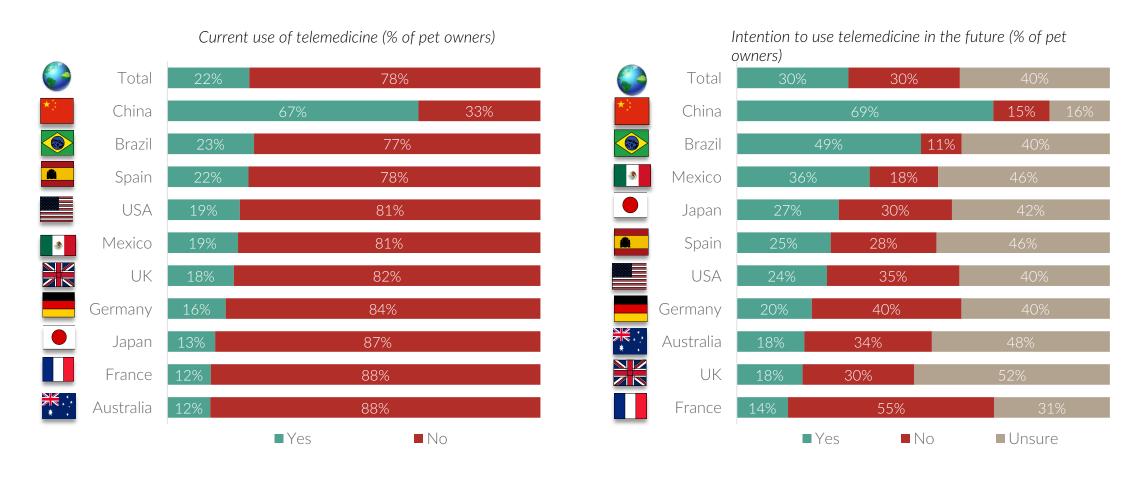
Seeking veterinary help for symptoms (% of pet owners whose pets exhibited symptoms in last 12 months who consulted a veterinarian specifically for that symptom)





INTEREST IN TELEMEDICINE IS EXPECTED TO GROW

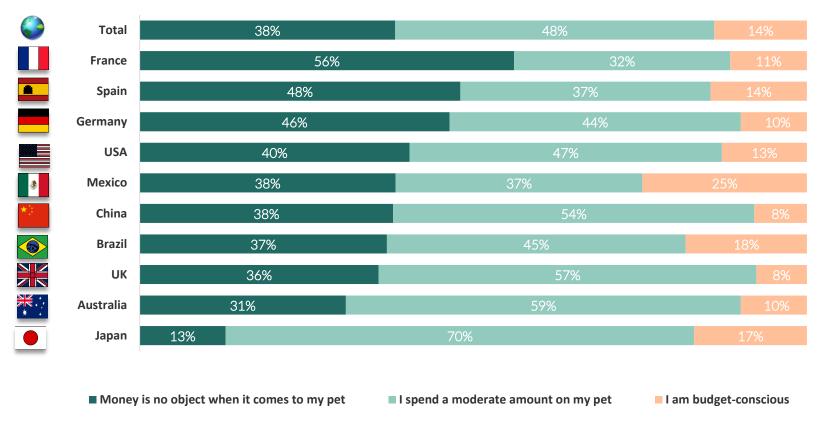
22% of surveyed pet owners have had telemedicine appointments with their veterinarians in the past month. 30% intend to use it in the future.



WILLINGNESS TO SPEND ON PETS

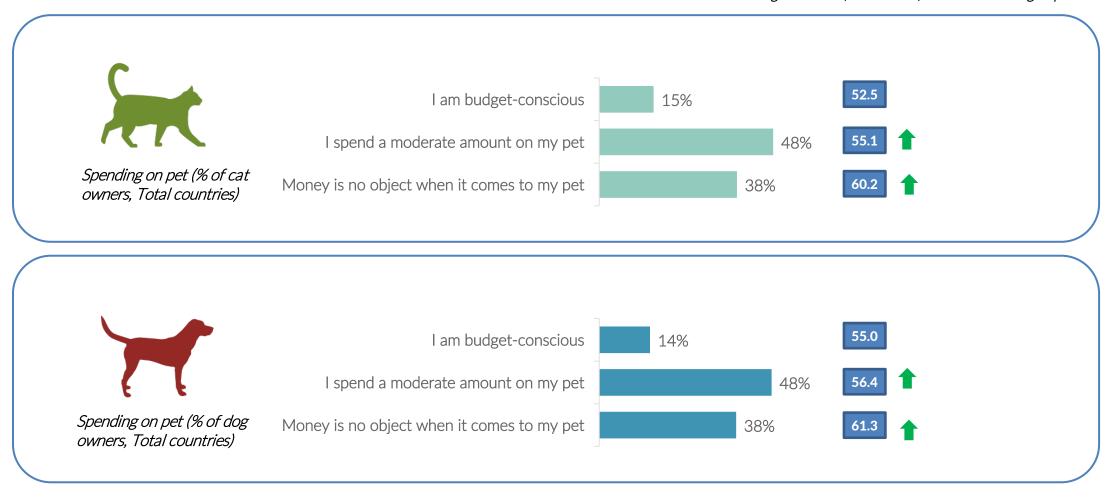
France, Spain and Germany have the highest percentage of pet owners for whom "money is no object". China and the UK have the fewest pet owners who say they are "budget conscious" on pet spending.

Spending attitude (% of pet owners, Total countries)



STRONGLY BONDED CAT AND DOG OWNERS ARE LESS PRICE SENSITIVE

Strength of bond (HABSCORE) of owners in this group

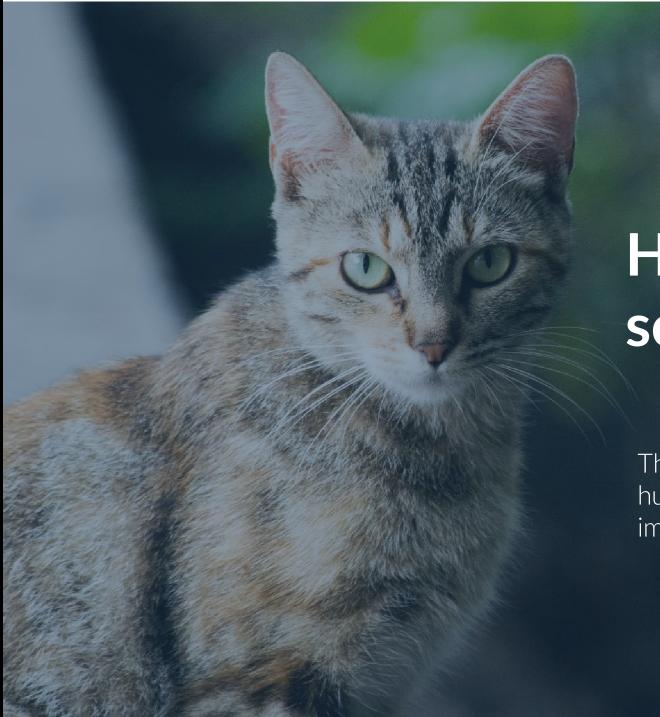












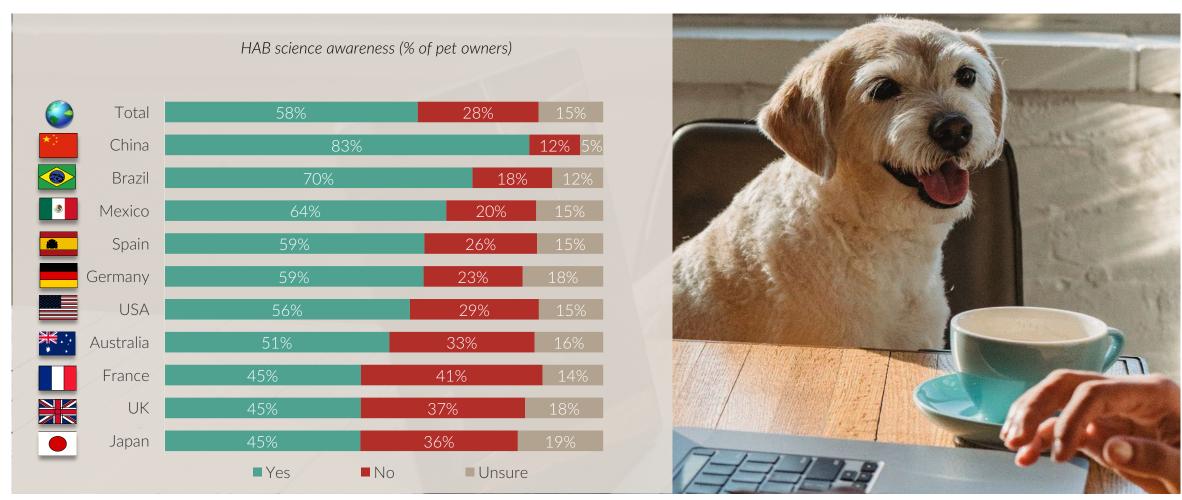
Human-animal bond science & awareness

This section maps out the current awareness of human-animal bond science and its potential impact on pet care.



58% OF PET OWNERS GLOBALLY HAVE HEARD OF HAB SCIENCE

Awareness is highest in China, Brazil & Mexico



Q28. Have you heard of scientific research on the human-animal bond that demonstrates pets can help improve physical or mental health in people?

Base: All pet owners (n=19,187)

STRONGLY BONDED OWNERS HAVE A HIGHER AWARENESS OF **HUMAN ANIMAL BOND SCIENCE** HAB science awareness by bond tier (% of pet owners in each HAB segment, Total countries) Unsure 23% 34% No 59% Yes Owners in the Owners in the lower bond mid bond tier upper bond tier tier

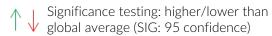
Q28. Have you heard of scientific research on the human-animal bond that demonstrates pets can help improve physical or mental health in people?

Base: All pet owners (n=19,187)

MENTAL HEALTH TOPICS HAVE THE HIGHEST AWARENESS

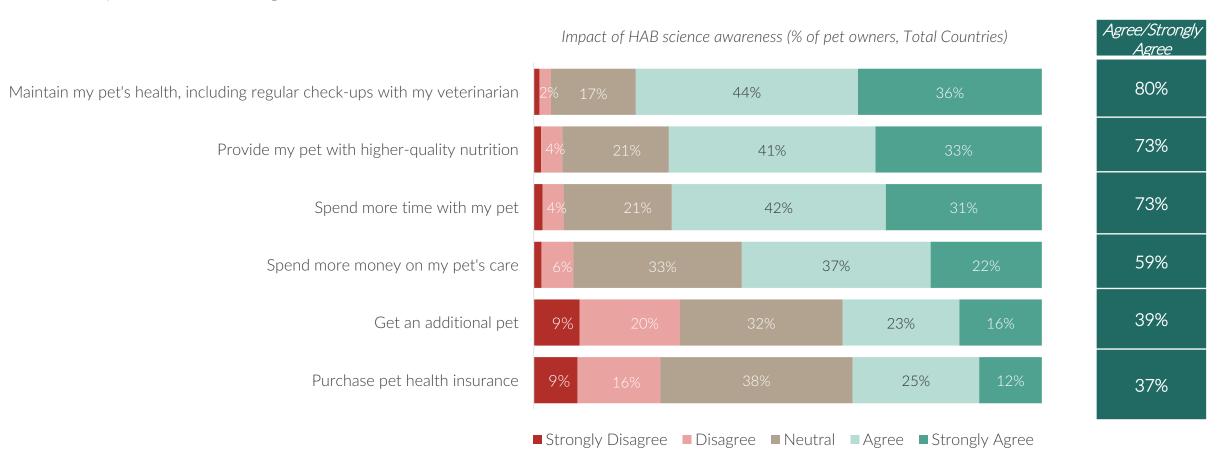
Loneliness is the benefit with the highest global awareness. Japan has high awareness of HAB impacts on Alzheimer's disease. Awareness of how the HAB can help people with PTSD is higher in the United States.

HAB science: topics (%,of cat/dog owners that aware of HAB science)	TOTAL	AUSTRALIA	BRAZIL	*: CHINA	FRANCE	GERMANY	JAPAN	MEXICO	SPAIN	UK	USA
Reduce stress	61%	67% ↑	69% ↑	45% ↓	65% ↑	58% ↓	52%↓	71% ↑	64%	63%	65% ↑
Reduce Ioneliness	61%	68% ↑	71% ↑	52%↓	62%	56% ↓	39%↓	61%	69% ↑	63%	63%
Reduce depression	59%	65% ↑	70% ↑	44%↓	60%	54% ↓	■ 36% ↓	68% ↑	68% ↑	62%	66% ↑
Reduce anxiety	56%	66% ↑	65% ↑	■ 41%↓	64% ↑	37% ↓	32% ↓	63% ↑	64% ↑	64% ↑	68% ↑
Support mental health	54%	67% ↑	70% ↑	49% ↓	48%↓	53%	40% ↓	43% ↓	43%↓	60% ↑	65% ↑
Enhance well-being	50%	49%	59% ↑	53% ↑	57% ↑	50%	46% ↓	42% ↓	53%	41% ↓	47% ↓
Help with conditions like autism	34%	28% ↓	35%	32%	40% ↑	■ 25% ↓	■ 25% ↓	41% ↑	52% ↑	32%	2 6% ↓
Help with conditions PTSD	29%	45% ↑	28%	16% ↓	28%	1 9% ↓	■ 24% ↓	32% ↑	29%	■ 33%↑	46% ↑
Help with Alzheimer's disease	22%	1 7% ↓	18% ↓	1 8% ↓	32% ↑	1 7% ↓	■ 31% ↑	16% ↓	35% ↑	1 21%	1 7% ↓
Improve the immune system	20%	16% ↓	1 -26% ↑	20%	1 4%↓	22% ↑	19%	20%	23% ↑	13% ↓	18%
Improve heart health	20%	23%	2-3%↑	20%	1 7% ↓	18%	11% ↓	18%	22%	1 9%	26% ↑
Promote healthy aging	20%	■ 24% ↑	17% ↓	18%	22%	21%	1 6%↓	1 6% ↓	21%	1 7% ↓	26% ↑
Support child cognitive development	17%	14%	■ 21% ↑	17%	15%	10% ↓	16%	18%	26% ↑	I 14% ↓	17%
Reduce over-weight & obesity issues	14%	14%	13%	15%	【 11% ↓	11% ↓	9%↓	13%	19%↑	14%	1 6% ↑
Help prevent child allergies	12%	9%	14% ↑	I 10% ↓	10%	9%↓	7% ↓	19% ↑	I 15% ↑	I 10%	10%
Support classroom learning	11%	1 7% ↑	-8% ↓	9%↓	12%	10%	1 7% ↓	6%↓	I 13% ↑	16%↑	1 4% ↑
Reduce reliance on prescription	10%	9%	1 9% ↑	1 1%	10%	 6% ↓	6% ↓	8%↓	1 2%	8%↓	11%



HOW DO PET OWNERS THEMSELVES THINK THAT GREATER KNOWLEDGE WILL IMPACT THEIR FUTURE BEHAVIOUR?

Would learning more about scientific research on the health benefits of pets make you more or less likely to do any of the following in the future?



Q32. Would learning more about scientific research on the health benefits of pets make you more or less likely to do any of the following in the future?

Base: All pet owners (n=19,187)



This section examines what veterinarians know and believe about the human-animal bond and its role in veterinary medicine.



PERCEIVED IMPACT ON CLIENTS AND THEIR PETS



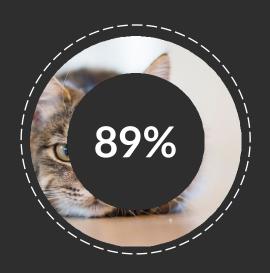
MENTAL HEALTH BENEFITS

The vast majority of veterinarians in all countries recognized pet ownership comes with mental health benefits for their clients.



PHYSICAL HEALTH BENEFITS

Three quarters of veterinarians associated pet ownership with physical benefits for their clients.



PET HEALTH AND WELFARE

The vast majority of veterinarians in all countries also shared the belief that a strong bond positively impacts overall pet and welfare



INCREASED SPEND ON PET

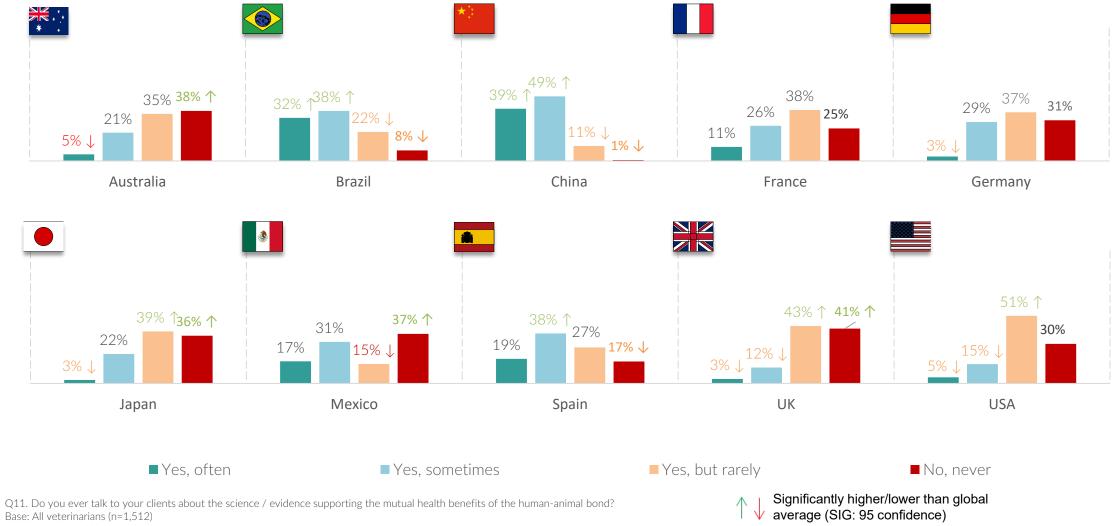
Two thirds saw a direct link between a strong bond and clients being willing to spend more on their pet.



HAB SCIENCE: COMMUNICATING TO CLIENTS

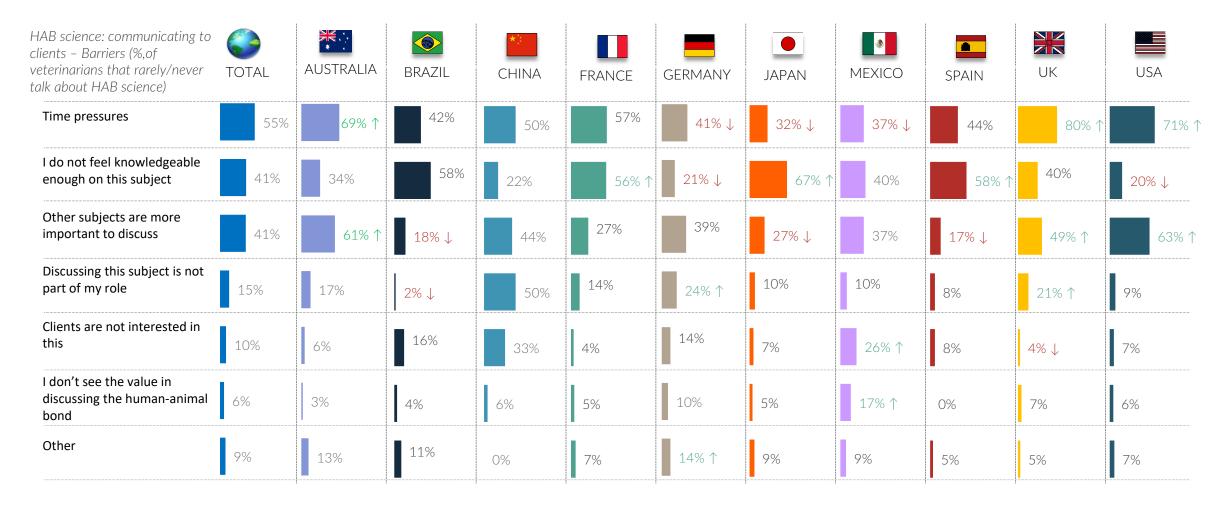
Veterinarians in Brazil, Spain and China are the most likely to speak about the science behind the human-animal bond with their clients.

HAB science: communicating to clients (% of veterinarians)



HAB SCIENCE: COMMUNICATING TO CLIENTS - BARRIERS

Globally, veterinarians talk about the human-animal bond with their clients because they feel it is valuable, promotes the best care for pets, and is a part of their role as veterinarians.

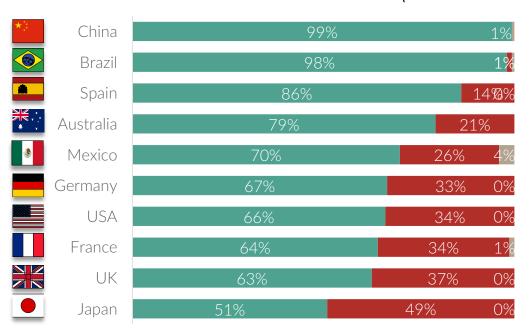




Q19C: Have you ever received any formal training regarding the human-animal bond? Please select all that apply. Base: All veterinarians (n=1,512)

GLOBAL INTEREST AMONG VETERINARIANS IN LEARNING MORE ABOUT HUMAN-ANIMAL BOND SCIENCE IS HIGH

Interest in HAB clinic **certification** (% of veterinarians)

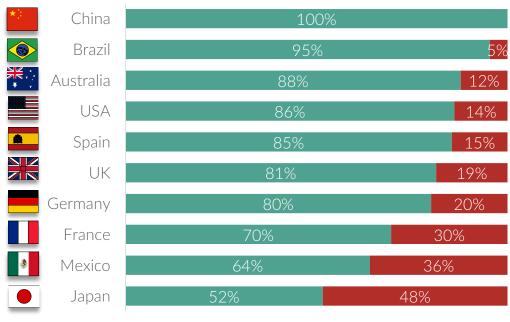


Yes, I would be interested
No, I would not be interested
I /we are already human-animal bond certified

Q20. If you were offered a course that would make you / your clinic certified in the science of the human-animal bond, is this something you would be interested to take part in?

Base: All veterinarians (n=1,512)

Interest in HAB **CE/CPD** (% of veterinarians)

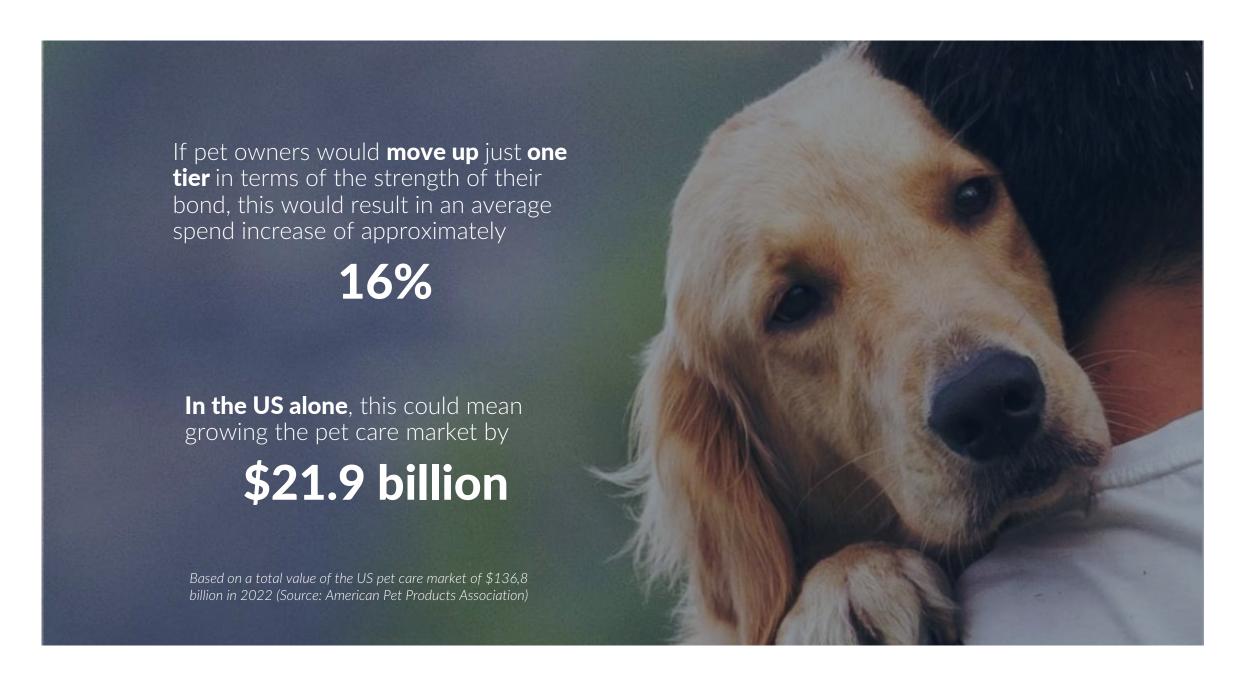


Yes, I would be interestedNo. I would not be interested

Q21. If you were offered CE on the science of the human-animal bond, is this something you would be interested to take part in?

Base: All veterinarians (n=1,512)















KEY SUMMARY POINTS

- The human-animal bond is a global phenomenon, and many people told powerful stories about how much their pet meant to them, often referring to their pet as 'family' or 'a child'.
- The strength of the human-animal bond has a significant impact on behaviour, including pet health and pet spending.
- An overwhelming majority of people reported health benefits connected to pet ownership.
- Knowledge of human-animal bond science correlates with stronger bonds and better health.
- Global efforts to strengthen the human-animal bond will have a major impact on health and wellness for both pets and people.