ASSALCO – ZOOMARK 2013 REPORT

ON THE FEEDING AND CARE OF PETS

SUMMARY

With the collaboration of

Introduction

The *2013 ASSALCO – ZOOMARK Report on Pet Food and Pet Care* has been written by ASSALCO – the Italian Association for Pet Food and Pet Care – and Zoomark International, in collaboration with SymphonyIRI and ANMVI – National Association of Italian Veterinarians.

As in the previous editions, this important project has been undertaken again in 2013 with the aim of providing the press and operators in the sector with a general overview of the main performance and trends of the market of pet products.

Pets are increasingly appreciated in this country and have an ever more important role to play in the everyday life of Italians, who consider them as actual family members.

Despite the economic crisis, Italians still provide their pets with healthy and safe diet, which is vital for their well-being, continuing to rely on pre-packaged products, in which they are demonstrating an increasing level of trust.

The market reflects the increasing focus on pets, proposing not only food but also various accessories, medicinal products and avant-garde services.

The ASSALCO – ZOOMARK Report, an annual event for all those involved in the pet sector, aims to give a scientifically sound response to the specific needs of a dynamic sector, provided by those who represent the pet food and pet care industry in Italy.

The ASSALCO – ZOOMARK 2013 Report is divided into four sections:

- **The Italian Market**: analysis of the performance of the sector in the main distribution channels in Italy, in particular GDO and specialised channels: traditional pet shops and pet shop chains. As regards pet shops, it has been possible thanks to the results of two recent market surveys to provide a detailed overview of this important channel;
- **Foreign Markets**: and overview of the performance and trends of the worldwide market with a focus on the main European markets, the United States, and the BRIC markets;
- **Veterinary Sector**: analysis of the results of an interesting ANMVI survey in comparison with the data from a similar survey conducted 7 years ago to study the development of the veterinary sector with reference to the structures it operates in.
- **Society, Trends and Lifestyle**: this year, in addition to data on the population and the annual Eurispes update, the report also contains the results of an interesting GFK Eurisko survey, by Dr. Giuseppe Minoia, on the value of human-animal relations for the Italian public opinion.

1 – THE ITALIAN MARKET

In 2012, the Italian market of pet food and pet care products remained constant despite the crisis affecting families and consumption.

The principal sector, that of cat and dog foods, **increased in value by 2.1%, for a total of 1,735.5 million Euros in returns**, of which 932.2 million Euros from cat food and 703.4 million Euros for dog food, which was supplemented by 99.9 million from functional snacks and treats, a category almost entirely dedicated to dogs. **Volumes declined slightly, by -0.8%, for a total of 549,600 tonnes commercialised.**

Cat and dog food, market total: 1,735.5 million Euros (+2.1%)

- 593.1 million Euros – Specialised pet shops (-0.2%)
- 106.5 million Euros – Pet shop chains (+12.4%)
- 1,035.9 million Euros – GDO channel (+2.5%)

With respect to 2011, the pet food sector has therefore shown slightly negative dynamics in terms of volume, although it continues to increase in value. These dynamics are affected by changes in purchase trends, such as the gradual transition from medium formats to single serving and the increasing number of small/medium sized pets, which has led to a **physiological decline in volumes** due to the reduction in waste, facilitated by single serving, and the lesser daily consumption of small dogs.
The market is holding in value terms due to the increasing focus on the health and well-being of pets and the trend of most pet owners in purchasing high quality foods, so-called premium and super-premium, **valorising their purchases according to the well-being of pets.**

As regards the trends of purchasers and purchase tendencies, a **superimposition of places of purchase** has been observed, similar to that for other categories in the Grocery segment, combining several sales outlets in the Grocery and specialized shops segments..

Also, **at least four different types of purchasers** have been identified: those focusing on quality, who usually use petshops, those focusing on price, who compare products and look for offers, “experimenters”, who like to vary flavours and types of food, and “habitual”, who use the food products they have always used. Their identification with one or other target leads to different trends in purchases, choice of products and channels they purchase from.

Different trends in different channels. In fact, while the traditional Petshop segment shows a decrease in volumes (-3.9%) and little change in value (-0.2%) for the third consecutive year, the Grocery segment continues to increase its turnover (+2.5%), although showing a slight negative trend in volumes (-0.5%). An interesting phenomenon is that of **petshop chains, which have shown an upturn of 12.4% in value** and 12.3% in volume compared to the previous year, showing the potential of this channel, which is currently rapidly expanding in Italy.

Traditional pet shops appear to be suffering the effects of the economic crisis more, although they remain the most profitable channel, together with specialised chains.

All segments, except for wet dog food, have seen upturns in value. The **expansion of the segment of snacks and treats** is of particular interest, registering an upturn on 12.1% in terms of value and sales, which have reached 100 million Euros. These products are snacks with functional goals, for example improving oral hygiene, or of a gastronomic nature, usually given as recompense or simply to keep animals occupied (for example in chewing).

As regards **other pet foods**, the survey of the GDO sector (Hypermarkets, Supermarkets and Small Self-service Shops – 100-399 m^2) shows a downturn of **-1.6%** in value.

In the same channel, the favourable trends in **accessories** (hygiene products, games, leashes, kennels, baskets, cages, aviaries, aquariums, tortoise homes and miscellaneous items) are continuing, **+2.4%** compared to 2011. It In particular, the hygiene sector is the driving force behind this upturn, a sign that consumers are not intent on renouncing the well-being and health of their pets. **Cat litters** have remained more or less stable (**-0.3%**), although there has been a significant upturn in smaller litters, less than 5 kg, and shallow ones.

Specialised channels: market research

Survey 1: Pet shops

The first survey of the specialised channel was aimed at exploring the structural and functional characteristics of shops nationwide and the profiles of their owners on one hand and the characteristics of customers from the viewpoint of the shop owners themselves on the other.

The following **main points** emerged:

- the vast majority of specialised sales outlets are independent businesses (not belonging to franchises or chains, accounting for 96.8%);
- 82.1% of the sales outlets are managed by a single owner or are family run;
- 69.5% of pet shops have a surface area of less than 100 m^2;
- small-scale shops are mainly located in urban centres, especially in major cities;
- nearly all of the shops questioned in the survey (98.8%) sell accessories for pets; more than 94% sell food; more than 80% of sales outlets also provide services, especially toiletry products, 60.6%, and home delivery, 47%;
- the sale of pets is more common in the South, where approximately 60% of the sales outlets involved in the survey are located, compared to 47.4% nationally and between 41% and 48% in the North and Centre.

As regards the **owners of the sales outlets**, the sample highlights:

- a substantial parity in the breakdown between men and women; men tend more than women to continue a family business and run shops that are on average larger than those run by their female colleagues;
- the average age in this category is reasonably young, being around 44.8 years. The most representative age group is than between 35 and 45 years;
- the level of education is quite high, with 65.1% of owners having a high school diploma;
- a significant majority (87%) stated that they own at least one pet, usually a cat or a dog.

After identifying the main characteristics of the specialised sales outlet in terms of structure, type of management and range of products, a survey was conducted on how the shop owners keep up to date and how they expand their business to keep it or make it more visible, profitable and competitive.

As regards the **methods of keeping up to date**, pet shop owners:

- prefer sector exhibitions;
- usually read magazines dedicated to operators in the sector (83.9%);
- use internet (72.3%), especially for surfing the websites of manufacturing companies, blogs and forums and the websites of competing pet shops.

The internet is also used to support business activities, but to a lesser extent with respect to its function of informing shop keepers. The percentage of businesses present on the internet has reached 52.8%, the majority with traditional display site or a Facebook page, the remainder having minimal exposure.

Online purchases and sales (e-commerce) are only used to a very limited degree with respect to their potential usage.

53.6% of the sample use communication, **promotion and marketing** to improve the visibility and business of their sales outlets, preferring the following methods:

- more classical forms of offering their products and discounts;
- advertising in magazines and the local media;
- distributing leaflets and discount cards;
- collaborating with animal breeders, trainers or veterinarians;
- organising events, sponsorships, etc.

According to the sample interviewed, their customers are fairly faithful, with an average of approximately two visits per month throughout the year for 62.9% of sales outlets. The sales outlet is chosen on the basis of proximity and ease of access; courtesy and assistance; on suggestion by a veterinarian or by word of mouth.

What mainly sell pet shops? The **offer** for cats and dogs – the most sold, accounting for 77.5% of sales – is available in practically all cases (99.3% for products for dogs and 98% for products for cats), but products for other animals are also widely available: in approximately 80% of sales outlets for small animals, 74.9% for birds and 66.5% for fish.

The sales of products for birds (10.4%) and fish (13.3%) are greater in sales outlets which also sell animals which, in turn, are more common in the south.

The shop owners were also questioned on whether they are asked for **advice** and what advice they are asked for by their customers. It emerged that the most common matters are:

- food, on which almost 90% of customers ask for more information and advice from their trusted shop owners
- the health and wellbeing of their pets
- the most appropriate behaviour and management

Survey 2A: non food segment of pet shops

The second pet shop survey focused especially on the **non food category**, in other words on a segment that is usually not surveyed much compared to the food segment, but is undoubtedly very important, especially for specialised channels.

The following also emerged from this sample of specialised shops:

- a significant majority of independent pet shops (not belonging to franchises or chains);
- a prevalence of medium and small-scale sales outlets and a very limited number of dependent collaborators (2.14 on average);
- limited sales of animals, and these especially focusing on fish, small animals and birds rather than cats and dogs;
- considerable presence of new or recently-opened businesses (60% 10 years or less, 20% 2 years or less).

The businesses opened in very recent years with respect to less recent years includes the highest percentage (38%) of those with the highest incidence of non food products on overall returns (in other words those for which over 40% of returns are from non food products).

The trend is for **sales** of non food products to be considered as **seasonal**, especially for categories such as clothing, which in most cases represents a significant segment during the winter (63.6% of those interviewed) and travel articles during the spring/summer (51.9%).

The sale of leashes, litters, games and accessories is less influenced by the time of year and are therefore year round, their purchase being influenced by various aspects, including:

- the quality and durability of materials (for leashes);
- the price factor, although not in an absolutely prevalent or prioritised manner;
- assessment of the wellbeing of the animal, expressed in terms of practicality for the animal itself;
- quality and effectiveness (for hygiene and cosmetic products).

The best sellers non-food items are those dedicated to dogs for at least one business out of three; for more than 65% of shop owners, non food articles for cats vary between 11% and 25%.

Articles for dogs:

- dogs are the privileged target for pet shops in terms of sale of non food articles, including leashes, clothing, accessories and miscellaneous products, kennels, transporters, hygiene and travel products, etc;
- clothing articles are dedicated especially (between 26% and 49% of sales) to small and toy dogs, which, among other things, are also the types of dog most sold in shops with live animals in their sales outlets;
- in shops with the highest returns from non food articles, the sale of clothing, especially top of range, is more marked.

According to the owners of the sales outlets, the choice of articles **for dogs** is influenced by:

- price, which is of significant importance in terms of the criteria for the purchase of clothing articles;
- practicality;
- quality of materials;
- functionality.

Considering non food products exclusively for **cats**, the following emerges:

- less presence in sales outlets,
- lesser incidence on returns,
- polarisation on two specific types of articles: litters and toiletries (meaning absorbent litter and the boxes to put it in) on one hand and accessories/miscellaneous articles on the other.

Litters and toiletries are the articles that are most sold by 50.7% of those interviewed.

The general perception of the shop keepers in reference to the non food segment, although in times of widespread economic difficulty in which a downturn in non primary expenses such as those for food is understandable, remains relatively positive. 23% of those interviewed believe the market is expanding and over 40% say that it is stable.

Survey 2B: a sector apart, aquariums

Of the sample interviewed, approximately 40% of sales outlets deal in aquariums,[1] and of these, 37.1% do so exclusively, not selling any sort of products for cats, dogs or pets other than fish. The majority of them are in provincial capital cities (59%), are traditional (96.7%) and started their business activities before 2009 (53%).

There are two types of aquariums, sea water and fresh water, which are traded in equal measure by 43.7% of sales outlets, while 39.6% only sell fresh water ones and 15.1% only sea water ones.

The shop owners interviewed highlighted a recent trend, perhaps also correlated to the current economic situation, towards the purchase of preformed aquariums of a smaller size rather than large personalised aquariums. In general, there has been a downturn in the number of aquariums sold in the last 2-3 years, and also in their average capacity.

Purchase drivers for the aquariums category:

- price, for 80% of those interviewed;
- aesthetics and design;
- type of aquarium to be created (62.5%)
- the technologies used (69.2%).

All the significant novelties that are important to the sector, indicated by both exclusive and non exclusive shop owners, refer to **technological innovations**. In particular, and especially for exclusive shops, the use of LED for illuminating aquariums, which has introduced the **energy saving** factor without changing the temperature of the water. Other novelties reported are those of dwarf aquariums (especially in exclusive shops), bio conditioners and electronic systems (especially in non exclusive shops).

Customer **consultancy and assistance** are of fundamental importance in this sector. In the case of exclusive shops, consultancies are also significantly extended to home assistance.

In any case, services are offered on a continuing basis (89%), and casual or occasional requests are much rarer (9%), which would indicate that this sector prevalently involves **passionates or aquarium lovers** rather than casual and temporary users.

The overall market appears, according to those interviewed, to be decreasing in recent years, and the spending power of customers is also limited for these products, and the majority of shops show it to be low or medium-low, only 31% deeming it to be medium-high.

[1] 245 sales outlets responded to the survey on aquariums.

2 – THE INTERNATIONAL CONTEXT

The **international pet food market** is worth 94 billion dollars, of which dog and cat food alone accounts for 67 billion dollars, an upturn of 2.5% compared to 2011. At a global level, the pet sector has also been affected by the economic crisis which has hit different areas. This upturn has been driven especially by the good performance of emerging markets, while the more advanced are stable or on a slight upturn.

In Europe (considering Italy, France, Germany, the United Kingdom, Spain and Holland), pet care (meaning dog and cat food, other animal food and accessories) sales continue to increase in terms of value. + 3.1% in 2012.

The Report also concentrates on the United States market, where expenditure on pet products reached 53.33 billion dollars (over 40 billion Euros). Expenditure on pet food was almost 20.64 billion dollars. After the downturn in 2010 and 2011, sales of dog and cat food recorded an upturn again in 2012, with an increase of 1.7%. The phenomenon of prioritising premium products also continued, as had also been the case in previous years.

An overview of the principal European markets is also provided, in other words the United Kingdom, Germany, France and Spain. The trends, peculiarities and consumer and owner behaviour is provided for each of these markets in a more general economic context.

Lastly, the Report focuses on the emerging BRIC markets: Brazil, Russia, India and China.

3 – THE VETERINARIAN SECTOR

The third section is dedicated to **the Veterinary sector**, using the data of a survey of the veterinary structures operating in Italy conducted by ANMVI and ASSALCO in 2012.
Furthermore, there is also a new geo-localisation service of Italian veterinary structures created by FNOVI in collaboration with ANMVI and active since 2012, in order to contact a veterinarian.

400 Veterinary Surgeons participated in the 2012 ANMVI – ASSALCO survey, representing approximately 6% of the total structures present in Italy, which ANMVI estimates to be 6,700/6,800. Of the structures involved in the survey, 78.3% were Surgeries, 13.5% clinics and 7.8% private practices. Only 0.2% were represented by veterinary hospitals.

Given that a similar survey had been conducted by ANMVI in 2005, it was possible to compare the responses obtained in both researches, in order to analyse the development of veterinarians in the last seven years with specific focus, however, on the type of medical structure in which they operate on a daily basis.

Compared to 2005, the presence of veterinary clinics has increased significantly, from 6.2% to 13.5% (+7.3%). This is probably due to the fact that they now offer services (specialised or otherwise) that are sufficient to protect the requirements of pets and their owners and guarantee more specific services, such as the distribution of pharmaceuticals or the sale of products in pet corners, thus getting closer to their customers.

According to the survey, Clinics now represent 25% of the structures opened during the course of the last 10 years. Among the veterinarians who operate in this specific type of structure, there appears to be a prevalence of women and in general of veterinarians under the age of 50, often with an advanced profile: internet users and those attending professional training courses.

52% of structures are in towns, compared to 45% in the outskirts. Small-scale structures are usually located in the outskirts (49.7%).

The veterinarian profession is still male dominated, but the number of women has increased significantly, from 27.90% (2005) to 38.5%. The average age of veterinarians is approximately 50. Compared to 2005, veterinarians attend professional and traditional training courses more often; however, 61.5% of those interviewed consider online training courses to be quite good, and 18.3%

consider them to be very good. It is interesting to note in this regard that the distribution of internet among veterinarians has increased; only 56.7% used it in 2005, compared to 80% in 2012.

The average number of veterinary surgeons in structures is 1.94 veterinarians on duty regularly. This would imply that there are over 13,000 veterinarians employed in the pet sector in Italy.

In 69% of cases, the veterinarian owns the structure; there are two veterinarians in 19.8% of structures, three in 4.8% and more than three in 6.3%. The majority (70%) of veterinarians involved in the survey did not give details on their annual business volume. The business volume is connected to the size of the structure – the larger the structure (physically and in relation to the number of personnel), the greater the returns – and the type of structure – the more specialised tools and equipment, the greater the business volume.

In recent years, the average amount of tools available in these structures appears to have improved in recent years and the overall offer of care services, including specialised, appears to have expanded. Of the structures involved, 67.8% offer Day hospital services; more than half, 54.8%, are available 24/7; 39% distribute pharmaceuticals and 11% have a pet corner. However, only 15% provide first aid services.

The younger veterinarians, with a more advanced professional profile, in other words those who state that they keep up to date and regularly attend professional training courses, are more willing to improve and expand the tools available in their structures.

The larger structures, such as hospitals and clinics, prescribe the largest number of pharmaceuticals annually: over 1,000 prescriptions. Also as regards vaccines, the majority of these in terms of volume are administered by clinics or hospitals (43.6%).

Although the percentage of pet shops with a pet corner has only increased slightly with respect to 2005, from 10.9% to 11.8%, the number of veterinarians who declare that they dispense pharmaceuticals has increased markedly, from 24.9% in 2005 to 39% in 2012.

The fear of more fiscal problems is a consideration against the spreading of Pet Corners (37.2% in 2005 and 47.9% now).But also the lack of space is a factor that affect this decision for 30.9% (15.1% in 2005). The perception that this activity devalues the profession is declining (from 20.9% in 2005 to 13.9% in 2012).

That obtained is an **overview at a national level** of the various types of private veterinary structures specialising in the care of pets, including on one hand the organisational methods, and more specifically medical services, and on the other certain aspects concerning the expansion by veterinary surgeons towards other professional sectors.

Customers of veterinarians

The same section contains a summary of the Assalco surveys in recent years, which demonstrate how important the role of the veterinary is.

Pets are now considered as true family members; this is demonstrated in particular by the increasing focus on the health of pets and the success of the campaigns in favour of medical and veterinary prevention.

Veterinarians have the role of protecting the health of pets through general and emergency care, prevention measures and safeguarding their wellbeing.

According to the surveys conducted by Assalco and ANMVI in recent years (from 2008 to 2012) aimed at veterinarians in order to better understand the profiles of the pet owners who periodically visit them showed that it is mainly women between the ages of 45 and 55, either housewives or pensioners, who go to veterinarians more often than men. Prevention is clearly the most common reason for visits, but neutering is also a frequent reason for visiting the veterinarian.

The more recent surveys showed a downturn in the percentage of those stating that they have never taken their pet to a veterinarian, while the frequency of visits to their surgeon have increased.

The most frequent advice requested of the veterinarian concerns nutrition and the prevention of illness, meaning that pet health and the consequent need for prevention is more important than any other preoccupation.

Increasingly with respect to the past, veterinarians are also considered the ideal consultant as regards nutritional and feeding aspects. Requests for nutritional advice, in the sense of both choosing the most appropriate and pet friendly food and also the choice of the specific product/brand, have increased according to the data from the Assalco – ANMVI surveys in recent years.

Requests for consultancies on feeding pets varies in cases in which the pet in question suffers from an eating disorder (intolerance, allergy, overweight), but in general pet owners are interested in knowing which food is the most suitable for their pets. This is testimony to the awareness of the important link between safe, properly balanced and healthy feeding.

The influence of professionals in the sector is undoubtedly increasing, while a predisposition towards the choice of food focusing on the characteristics and needs of the animal.

The veterinarians themselves advise the choice of a specific industrial product for the lifestyle or characteristics of the animal rather than a home diet, also for healthy pets, while if the pet suffers from any disorder, this is almost indispensable. In the case of disorders or illnesses, again with the assistance of the veterinarian, the owner can choose the food most suited to the specific needs of their dog or cat, also trying dietary foods studied to satisfy specific nutritional requirements.

Almost all of the veterinarians involved in the various surveys in recent years advise industrial food, as it is the most suitable to guarantee adequate product safety and the proper nutritional value required to maintain the health and wellbeing of pets.

In 2005, 80% of veterinarians advised pet food. According to the data from the latest Assalco survey in 2012, as many as 88% of veterinarians advise that the owners of healthy pets choose industrial food. This also confirms that the care and wellbeing of pets and improving their health depend very much on a proper diet.

4 – SOCIETY, TRENDS AND LIFESTYLE

The final section contains the updated data concerning the presence of pets in Italy: according to the Eurispes Report, more than 55% of Italians live with pets. These are mainly dogs and cats (55% and 49% respectively), but fish, birds, rodents and other small animals are also widespread. Euromonitor estimates that the animal population in Italy is approximately 7 million dogs and 7.5 million cats, and there are also 1.8 million small mammals, such as rabbits and rodents, almost 1.4 million reptiles, such as tortoises, iguanas and snakes, 13 million birds and 30 million fish.

An analysis is also included of the maintenance costs for pets, which in terms of food are less than 30 Euros per month for most Italians, while almost 70% spend a maximum of 100 Euros per year on veterinary visits and pharmaceuticals.

The Report then concentrates on research into Italian and pets conducted by Gfk Eurisko, by Dr. Giuseppe Minoia.

The research shows that there is a **plebiscitary sharing of the value of pets**, not only by those who own them but also by the totality of public opinion. **More than 90% of pet owners and more than 80% of public opinion attribute real benefits to the presence of pets.**

The results are especially significant if we consider what the "people" think about dogs and cats, independently of whether they own them or not:
- *"cats and dogs help you feel better"* - 84%
- *"they give a lot, without asking for much in return"* - 81%
- *"they keep you company"* - 80%
- *"they are true family members"* - 70%
- *"they are of great help in times of difficulty"* - 65%

Pets are considered to be **an important presence and a source of "wellbeing"**, which is linked to the desire for a "good life" which characterises the majority of the Italian population. "Good life" is intended as a lifestyle of sustainable wellbeing, based on values which are almost unanimously shared by Italians today: health; safety; a life without waste, aimed at saving; taking care of personal aspects and personal wishes; being in harmony with nature; friendship; leisure time.

The presence of pets is included among these values and it is recognised that **dogs and cats contribute towards a good quality of life**, for both individuals and their families. 55% of Italians and 75% of pet owners are convinced that dogs and cats "contribute towards keeping a family united".

In this sense, pets and related costs are seen as an area of "expenditure-investment", which not many are willing to sacrifice, despite the difficult consumption climate.[2] Savings are made on everything, **but Italians are not willing to sacrifice consumption related to "wellbeing", including pets.**

It can be seen that **59% of pet owners say that they do not pay much attention to the cost of their pets**, while a mere 21% of pet owners say that they try to cut down on these costs. Furthermore, 55% say that they are not willing to sacrifice using the best food for their pets, being aware of the importance of a balanced diet for their wellbeing.

Pet owners are convinced that **wellbeing and a good quality of life, especially in difficult times such as these, are favoured by the presence of pets** (81% of pet owners). The majority of public opinion in Italy also believes that pets are a help in critical times (60%). They are seen as a support and source of happiness and consolation in difficult times.

There is an overall conviction that the presence of pets is good in an emotive, affective and behavioural sense.

According to the Gfk Eurisko research, there is currently **a real specific lifestyle related to the presence of pets**, a pleasant and entertaining lifestyle which helps one to stay healthy and also

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[2] From the periodical research Social and Consumption Climates, for which the latest Gfk Eurisko data refer to April.

helps families raise their children better and individuals to stay in good physical shape. Almost the totality of public opinion believes it is a "democratic" lifestyle, one which almost everyone today can enjoy.

The survey shows that there is a general belief that neither income ("being well off") nor available space ("having a garden") are fundamental elements in living with a dog or cat.

There is also a general conviction that pets are not dangerous (thinking of dogs obviously) and that potentially dangerous behaviour is due to shortcomings in training pets on the part of their owners (83%).

As regards the desire to have a pet on the part of those who don't, this research provides some surprising figures: 55% would like to have a pet. This is a potential figure which can be compared to a more realistic one: **20% are thinking of getting a pet in the next few months.**

Lastly, the overwhelming majority of those interviewed said that they are favourable to the increased attention by society and institutions towards pets and to the fact that they are increasingly considered as having specific rights of their own.

In this regard, **more space and focus on pets is expected in the media**. This research shows the wish (52% of public opinion and 72% of pet owners) for more contents concerning pets and their rights, their training and living with them, in addition to aspects concerning pet care and their wellbeing. The media should also be seen as storytellers which relate and provide updates on the lifestyle of pets with their owners.