

Fur babies are part of the family for SA's middle-class

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BrandMapp insights into lucrative SA Pet Market



According to a 2023 Bloomberg report, the global pet industry is worth around \$320 billion right now and will reach \$500 billion by 2030, about the same as the GDP of Nigeria. And according to the latest annual BrandMapp survey, the country's largest online study targeting those living in households with R10k+ monthly income, South Africa's middle-income base contributes more than its fair share of a local pet market that some estimates value at over R8 billion a year. That's a lot of money in a country where the total amount spent on corporate social investment programmes last year was around R11 billion. So who are all these pet people and what are they actually paying for?

While pet foods make up the dominant chunk of the total market, it also includes fast-growing sectors such as veterinary care and meds, nutritional supplements and treats, grooming and boarding services, pet toys, beds and a wide range of accessories. There also appears to be a growing demand for pet-friendly travel options, accommodation, activities, venues and other recreational spaces as consumer perceptions change over time.

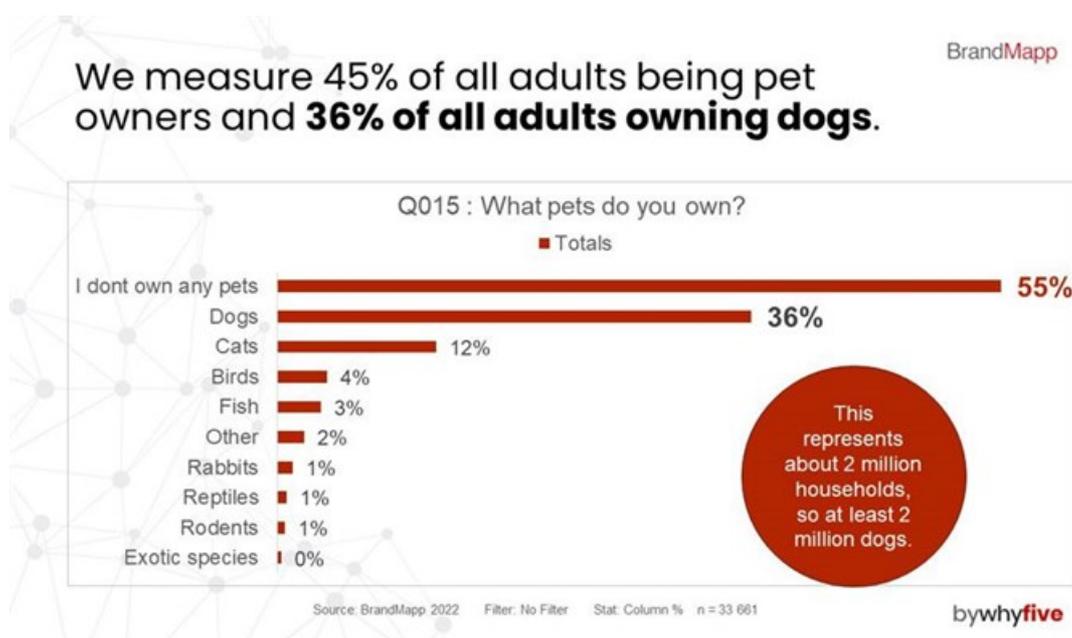
It's a shift that Brandon de Kock, director of storytelling for WhyFive Insights, attributes to pets now having more esteemed 'positions' and 'roles' in middle class family life. "To begin with, in South Africa, the traditional role of dogs in particular goes further than just companionship and a burglar alarm, you 'best friend' can save your life and allow you to go for a walk around the block by yourself. So our unique circumstances are fertile ground for a far more intimate relationship. As a result, the dog is no longer left out in the cold or tied up to bark in the backyard, and the cat isn't just an amusing mouse-killer that comes and goes. Families now have 'fur babies' and it's caused the pet market to boom in a range of ways."

Every year, WhyFive's annual BrandMapp study takes a focused and intentional look at South Africa's mid- to top-income consumers to get insights into lifestyles, perceptions, and consumer behaviours. And animals play an important role here, with 45% of all adults being pet owners and 36% of all adults owning dogs. "That's at least one dog, most probably more, in around two million middle class South African homes," De Kock goes on to say. "which translates into an extraordinary

amount of 'extra' things in our suburban consumer landscape, from doggie-doo refuse bins to designer leashes and gourmet kitty-nibbles."

There are a few demographic skews in the pet ownership landscape, starting with a correlation between pets and age: the older you are the more likely you to have a pet, until retirement age when pet ownership drops off again. There's also a general white market skew against the total population. "You can draw your own conclusions," jokes De Kock, "but when it comes to 'exotic' pets, it appears to be a rare, white-dominated market in South Africa. Which is a useful insight if you're selling axolotl feed or tarantula cages. In reality though, the more niche pet categories, literally the rats and mice, make up less than 20% of the total pet pie that's totally dominated by the usual suspects!"

Dogs are South Africans' most popular fur babies



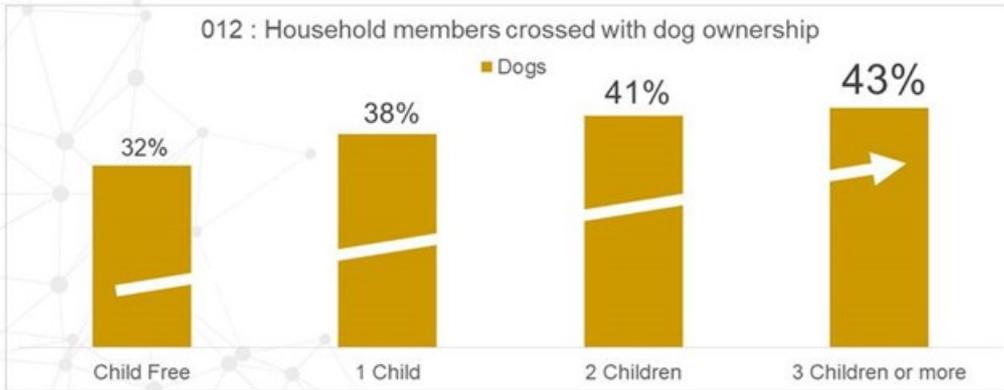
81% of all pet owners (or a remarkable 36% of all South African adults) have dogs, significantly more than the 27% (12% of total) who say they have cats. De Kock says, "However, of course there is also some cross-over. We find that 57% of cat owners also own dogs but only 19% of dog owners also give a home to cats. So I think it's fair enough to say that while cat lovers are animal lovers, most dog owners are just dog lovers."

Lonely or crazy doesn't necessarily make you a pet owner

The traditional middle-class predilection for pets has often been centred on the human need for companionship. Out of that has stemmed the stereotypes of the 'lonely, crazy cat lady' and the 'creepy fish tank guy'. However, the BrandMapp data reveals the myth here.

Family and pet ownership go hand in hand.
The **more kids** you have, the **more likely** you are to have a dog!

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Source: BrandMapp 2022 Filter: No Filter Stat: Column % n = 33 661

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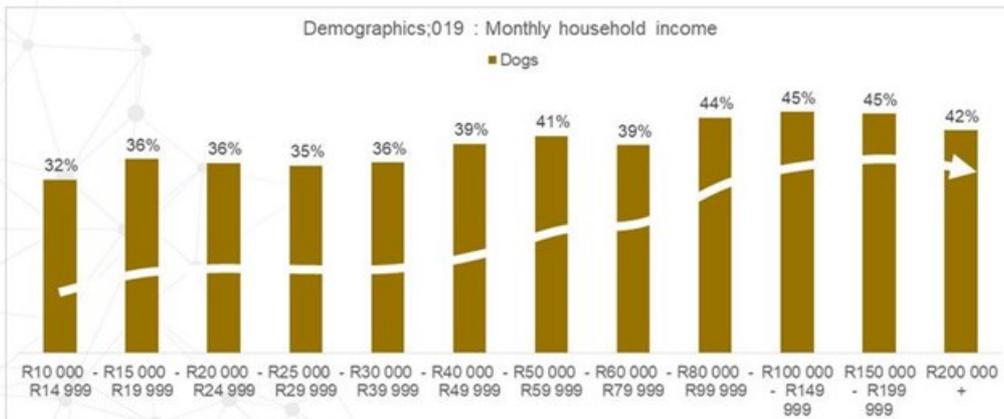
“Those stereotypes are actually rarities in South Africa,” says De Kock. “In fact, people who live alone are least likely to be pet owners, and instead we see that family and pet ownership go hand-in-hand. When we cross-tabulate our family and dog ownership data what we see is that the more kids you have, the more likely you are to have a dog!”

Is pet ownership mostly for the wealthiest?

Rising food and healthcare costs impact on pet owners too, and yes, obviously more money does help when you have more mouths to feed and bodies to care for.

There’s a general trend here showing that **the wealthier the household, the more likely** it is to be a dog house BUT it’s not as radical as you may think.

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But De Kock says: “There’s a general trend here showing that the wealthier the household, the more likely it is to be a doggie house, however it’s not as radical as you may think. There’s a solid stack of mid-income earners who, it seems, are willing to make the budget stretch so that they can enjoy being dog owners.”

These are just a few of the many insights available in BrandMapp that can assist brands and services in the growing pet market understand the needs, perceptions and behaviour of their potential customers. Knowing that only 6% of South African pet owners have pet cover might well liberate your thinking if you’re in the insurance game, for example. And for those in the social responsibility game, it could be fascinating to discover that only 8% of non-pet owners think that animal welfare is a worthy enough cause to donate money to, but 32% of pet owners actively follow their hearts and do give to

animal welfare initiatives.

“There’s an old Jerry Seinfeld skit,” concludes De Kock, “where he says, ‘If aliens are watching this through telescopes, they’re gonna think the dogs are the leaders. If you see two life forms, one of them is making a poop, the other one’s carrying it for him, who would you assume was in charge?’” It’s a joke, but there’s a hidden truth. The landscape has shifted, people are willing to spend a lot more on pets than our ancestors would ever believe possible, and it’s hard to see it going backwards.”

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BrandMapp is a unique South African dataset that uses a mega-sample of more than 30 000 respondents to profile the 12 million adults who live in mid to top-income households earning in excess of R10 000 per month. Now in its eighth year, the BrandMapp survey is a bespoke, independent survey that powers the WhyFive consumer insights consultancy.

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