

# 2018 宠物消费趋势报告

CONSUMPTION TREND

京东发布于2018 CIPS期间

Released by JD.com during CIPS 2018 @ Guangzhou, China



## 报告说明 Introduction

乖巧可爱的宠物，俘获了越来越多城市青年的心，中国宠物经济正在起步。

有关数据显示，中国宠物狗的数量已经达到2740万只，城镇平均养宠率约为11%，为世界前三的“养宠大国”。在惊人的宠物总量数字之后，同样令人惊叹的是背后的市场规模，2017年中国宠物市场规模达已经到了1470亿元，预计到2018年其市场规模可以达到1678亿元，而且在未来3-5年内，宠物行业将继续维持20%以上的高增长。

这个翻天覆地的变化，源自大陆经济的飞速发展和民众生活水平的不断提高。民众对宠物的态度和饲养方式也发生极大转变，已不再单纯地将宠物视为消遣玩物，而是视为家人。下面将以京东大数据为基础，结合行业数据，对整个国内宠物消费市场进行透视。

The adorable pets attract more and more young people, and Chinese pet economy is rising.

According to the data, the amount of Chinese pet dogs has been reached at 27,400,000 and the average number of keeping pets in cities is around 11%. As the big country of keeping pets, China has ranked at the third place all over the world. The large amount of pets breeds an amazing market scale. In 2017, Chinese pet market had reached 147billion RMB, and it's estimated that the market would come up to 167.8 billion in 2018. In addition, within the future 3 to 5 years, the pet industry will keep the rise at more than 20%.

This earth-shaking change is rooted in the rapid development of mainland economy and the continuous increase of people's living condition. People's attitude towards pets and the way of keeping pets are transferring. Rather than taking pets as toys or entertainments, people more regard pets as families. Then based on JD's big data and data from the pet industry we will analyze the whole domestic pet market.



## 消费人群画像 User Profile



通过研究消费者的性别、年龄、地域、职业、收入、学历、养宠类型、购买品类、消费理念、搜索关键词、养宠原因等，将宠物消费人群进行分类，并为各类人群进行画像，提炼人群属性及标签。

Through studying the consumers' genders, ages, places, occupations, income, education backgrounds, types of keeping pets, purchasing categories, consumption views, key words of searching, reasons of keeping pets, the consumers are divided into different types and attributes and tags of them are exacted out.



对比地域、性别、年龄、收入等变化，反应养宠人群的趋势变化

Compared with the changes of places, genders, ages and income reflects the trend changes of pet consumers.



# 01

Pet Industry  
Overview

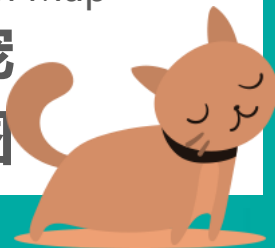
宠物行业  
情况概览



# 02

China Pet  
Consumption Map

中国养宠  
消费地图



# 03

Who are  
these customers

谁在为  
爱宠消费买单



# 04

Consumption  
Trend

宠物消费  
趋势



# 01 宠物行业情况概览

Pet Industry Overview



## 中国宠物行业发展现状

### Development Status of Chinese Pet Industry



2012-2017年我国宠物行业市场规模不断扩大，年均复合增长达到34.63%，增长十分迅速。据统计2017年中国宠物行业市场规模达到1470亿元，同比增长20.5%。尽管近年来我国宠物行业市场规模增速有所放缓，但仍然能保持高于20%的增速，高于零售行业平均增速。

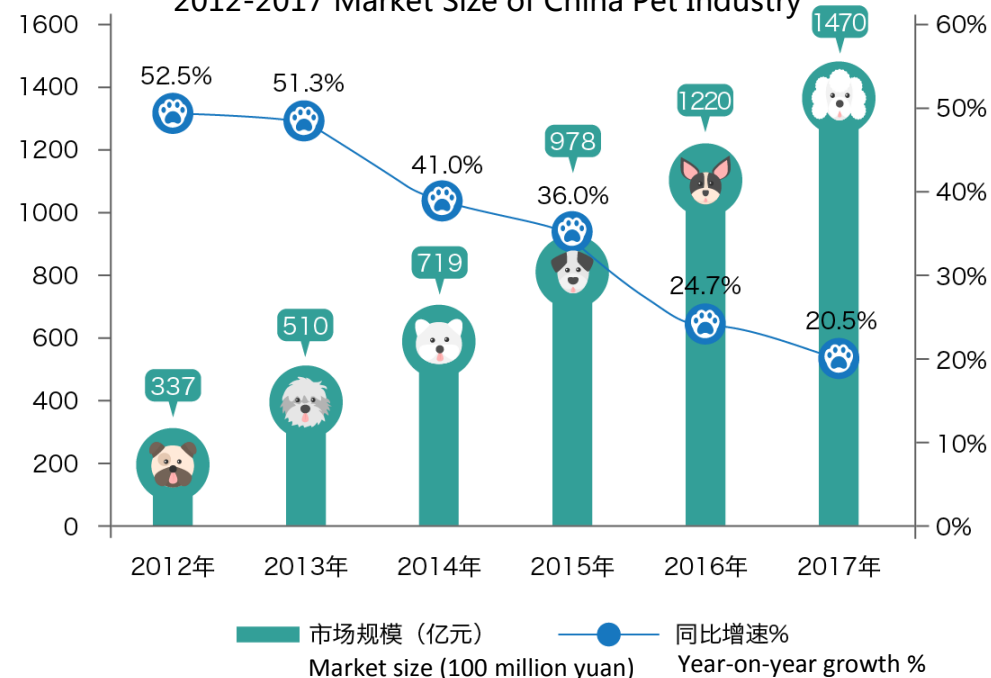
Chinese pet market was enlarging from 2012 to 2017, average year compound growth was 34.63%. According to the statistics, the market size of Chinese pet industry reached at 147 billion RMB, the year-on-year growth is 20.5%. Though recent years the pet market were experiencing the slowdown, it still keeps the growth of over 20%, higher than the average speed of retail industry.



消费升级叠加情感需求，养宠渗透率持续提升。《宠物用品及服务行业市场调研与投资预测分析报告》显示，预测到2021年，在养宠渗透率持续提升下，预计城镇养宠率将达19%，宠物市场容量有望翻番，复合年均增长率为16.6%。

Consumption is upgraded with more emotional needs, continuous growth of penetration rate of keeping pets. "Market research and investment forecast analysis report of pet products and service industry" demonstrates that in 2021, the rate of keeping pets in cities will reach at 19%. The market capability will double and the compound annual growth rate will be 16.6%.

2012-2017年中国宠物行业市场规模统计  
2012-2017 Market Size of China Pet Industry



■ 市场规模 (亿元)      ● 同比增速%  
Market size (100 million yuan)      Year-on-year growth %

● 数据来源：中商产业研究院

## 中国宠物行业市场规模预测 Pet market scale forecast



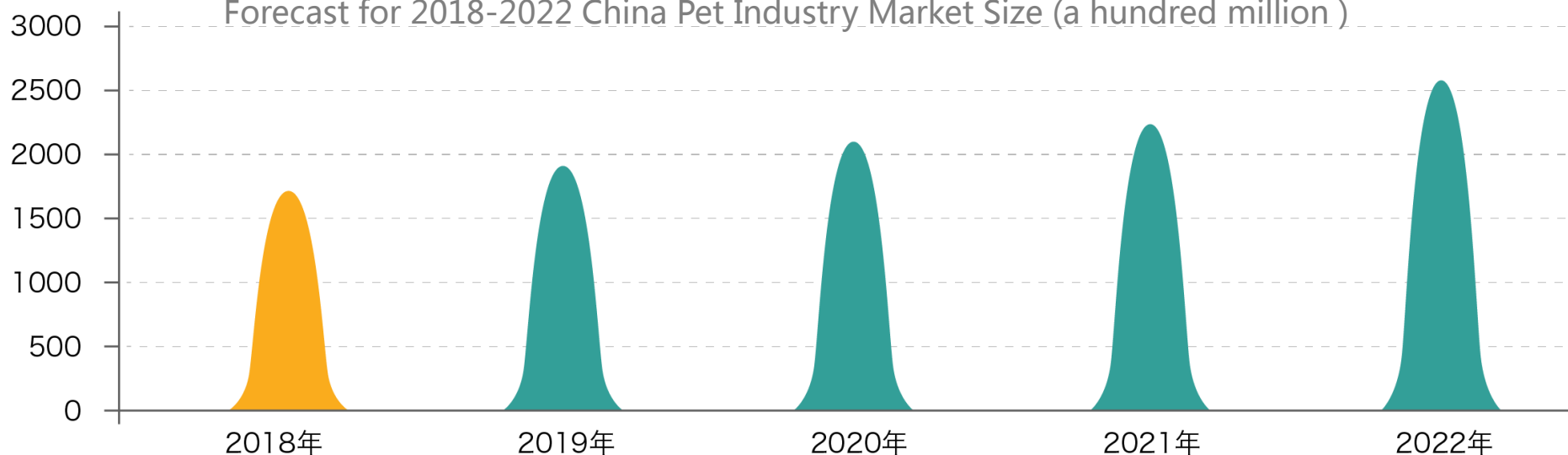
宠物行业是社会经济发展进入较高水平时衍生出的新兴产业，未来，随着宠物饲养观念的更广泛普及和宠物行业延伸服务的更深层挖掘，我国宠物行业的市场空间将进一步扩大。

未来3-5年宠物行业将继续维持高速增长，预计2018年中国宠物行业规模将达到1678亿元，到2022年市场规模有望突破2500亿元。

In 3 to five years, the pet industry will continue its high speed of growth. It is estimated that Chinese pet market would be 167.8 billion RMB in 2018, and break through 250 billion RMB in 2022.

### 2018-2022年中国宠物行业市场规模预测（亿元）

Forecast for 2018-2022 China Pet Industry Market Size (a hundred million)



● 数据来源：中商产业研究院整理

## 线上宠物消费增幅领跑大盘

### Remarkable growth of online pet consumption

我国宠物热潮从上世纪末开始兴起，短短十几年宠物产业从无到有，并逐步繁荣。相较于国外成熟的宠物市场，中国宠物市场起步虽然晚，但近年来保持着高速发展。如今我国宠物市场正处在快速发展阶段。

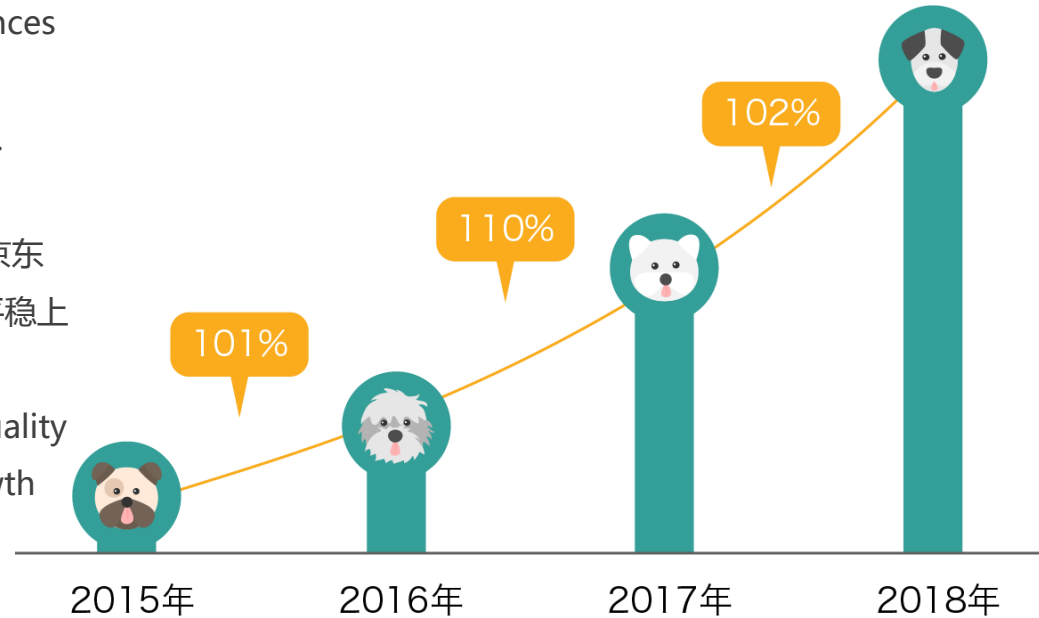


The fashion of keeping pets rose from the end of last century. The pet industry experiences from zero to one and becomes prosperous gradually. Compared with the mature pet market abroad, though Chinese pet market started late, it still keeps developing rapidly. Now we are in a fast development stage.

随着国内宠物经济消费升级的推进，消费者对高品质线上宠物消费方式的接受程度越来越高。京东大数据显示，2015年-2018年京东平台上，宠物消费始终保持着100%以上的增长，且有不断平稳上升的趋势。



With the upgrade of domestic pet consumption, consumers more prefer to the high-quality online pet consumption. According to JD' s big data, pet consumption keeps the growth of 100% and holds the steady rising tendency.





## 宠物主粮、家居日用等品类成为消费者线上主购类别

### Staple food, pet appliance, etc. become major online consumption categories

随着我国宠物经济市场的蒸蒸日上，围绕着宠物从出生到死亡的整个过程，已形成了一条包括宠物繁育、宠物交易、宠物食品、家居日用品、医疗保健、宠物美容、宠物培训、宠物保险等一系列商品和服务的“宠物链”。

目前，以医疗保健为代表的专业服务已跃居复购率TOP3品类之首。With the rising of pet market, there exists a “pet chain”, that connects pet breeding, pet trade, pet food, home supplies, health care, pet grooming, pet training and pet insurance, etc..

#### ◆ 销售金额TOP5品类

Sales Top 5 Categories

- 1 宠物主粮  
Pet Staple food
- 2 家居日用  
Home supplies
- 3 水族  
Aquarium
- 4 医疗保健  
Healthcare
- 5 宠物零食  
Pet Snacks

#### ◆ 复购率TOP3品类

Repurchase Rate TOP3

- 1 医疗保健  
Healthcare
- 2 宠物主粮  
Pet Staple
- 3 家居日用  
Home Supplies



消费者对线上购买宠物商品已经形成依赖

Consumers have relied on purchasing pet products online



## 各品类线上销售品牌排行 (1)

### Rank list of online consumption categories(1)

随着宠物主收入水平的上升和宠物角色转变，越来越多的宠物主愿意支付费用为其宠物提供更似“家人”般的生活方式。

2017年，我国88%的养宠家庭会愿意给宠物消费，当前，宠物用品逐渐呈现品牌和品种多元化的趋势，而且针对不同的细分需求和随着消费升级，宠物用品分类在不断细化。As the income level of pet owners goes up and the roles of pets have been transferred, more and more pet owners would like to spend money on providing the pets with the better living condition like their families. In 2017, 88% families would like to spend money on pets. Now the brands and types of pet supplies are diversified. As the consumption upgrade, the pet supplies are classified according to different market needs.

目前宠物经济市场，宠物主会更倾向于选择大品牌，在各个细分品类中，大品牌持续领跑宠物消费排行榜；不过正如人们爱尝鲜，宠物主们也在不断测试爱宠的口味——哪个才是它们的最爱，因此小众新兴品牌的增幅也不容忽视。Among different categories, pet owners prefer to choosing big brands that rank at the leading place in consumption ranking list. Because pet owners are exploring their pets' tastes, the growth of some new niche brands can't be ignored.



## 各品类线上销售品牌排行(2)

### Rank list of online consumption categories(2)

Pet snacks

宠物零食

Rank TOP5  
排名TOP5

- 1 宝路
- 2 麦富迪
- 3 顽皮
- 4 多格萨萨密
- 5 路斯

Growth TOP5  
同比增幅TOP5

- 1 猫太郎
- 2 酷奇思
- 3 句句兽
- 4 珍致
- 5 阿飞和巴弟

Pet cleaning & beauty

洗护美容

Rank TOP5  
排名TOP5

- 1 科德士
- 2 雪貂留香
- 3 蓝豚
- 4 简斯
- 5 憨憨乐园

Growth TOP5  
同比增幅TOP5

- 1 咖卡
- 2 智感
- 3 4LEGS
- 4 憨憨乐园
- 5 金盾

Pet trip equipment

出行装备

Rank TOP5  
排名TOP5

- 1 憨憨乐园
- 2 华元宠具
- 3 爱丽思
- 4 英伦印象
- 5 福莱希

Growth TOP5  
同比增幅TOP5

- 1 嬉皮狗
- 2 宠宠熊
- 3 阿莫尔
- 4 白领公社
- 5 猫乐适

Pet toys

猫狗玩具

Rank TOP5  
排名TOP5

- 1 憨憨乐园
- 2 华元宠具
- 3 田田猫
- 4 星记
- 5 贵为

Growth TOP5  
同比增幅TOP5

- 1 贵为
- 2 悠乐宠
- 3 pidan
- 4 宠幸
- 5 伊丽宠具

Aquatic Brand

水族

Rank TOP5  
排名TOP5

- 1 森森
- 2 德克
- 3 闽江
- 4 奇溢自然
- 5 鱼之宝

Growth TOP5  
同比增幅TOP5

- 1 意牌
- 2 松宝
- 3 海豚
- 4 神阳
- 5 可丽爱

Exotic pet supplies

小宠用品

Rank TOP5  
排名TOP5

- 1 洁西
- 2 宠尚天
- 3 正楷
- 4 憨憨宠
- 5 祖莉

Growth TOP5  
同比增幅TOP5

- 1 森悠
- 2 柏卡乐
- 3 R&M
- 4 筱宠
- 5 憨憨宠

02

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# 中国养宠消费地图

China Pet Consumption Map

# 京粤沪苏川成主力消费人群

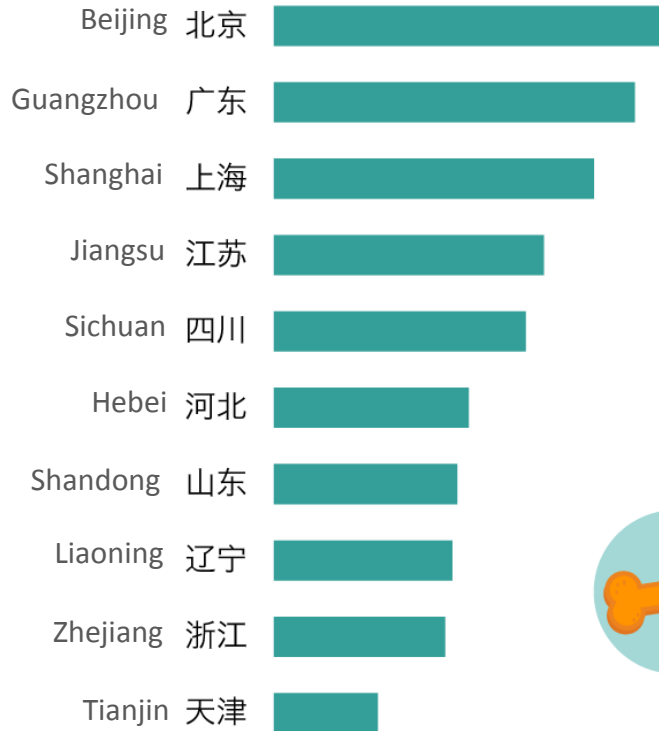
## Consumers mostly from Beijing, Guangzhou, Shanghai, Jiangsu, Sichuan Provinces

北京、广州、上海、江苏和四川在狗和猫宠物消费方面均为主力消费大省。Beijing, Guangzhou, Shanghai, Jiangsu and Sichuan are the pet dogs and cats consumption provinces.



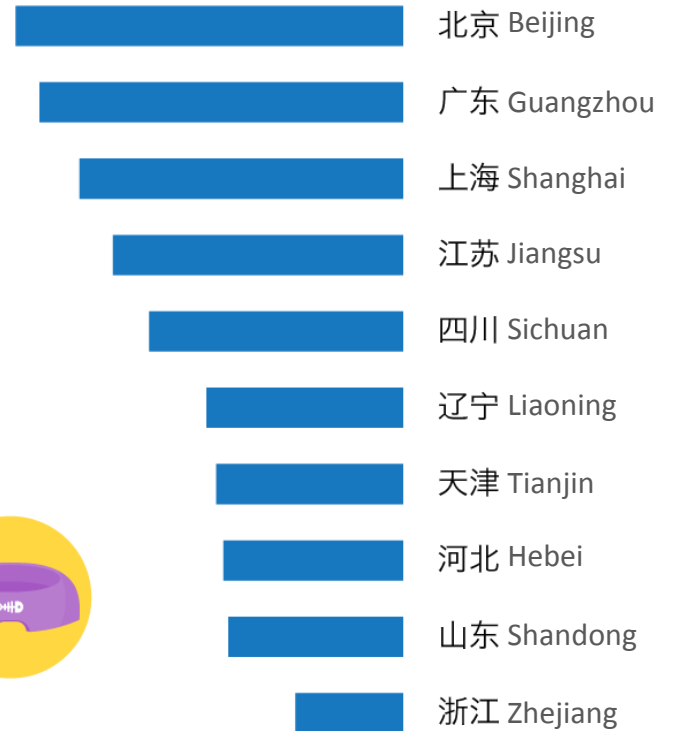
### 消费金额TOP10省份（宠物狗）

Consumption TOP10 Provinces (Dog)



### 消费金额TOP10省份（宠物猫）

Consumption TOP10 Provinces (Cat)



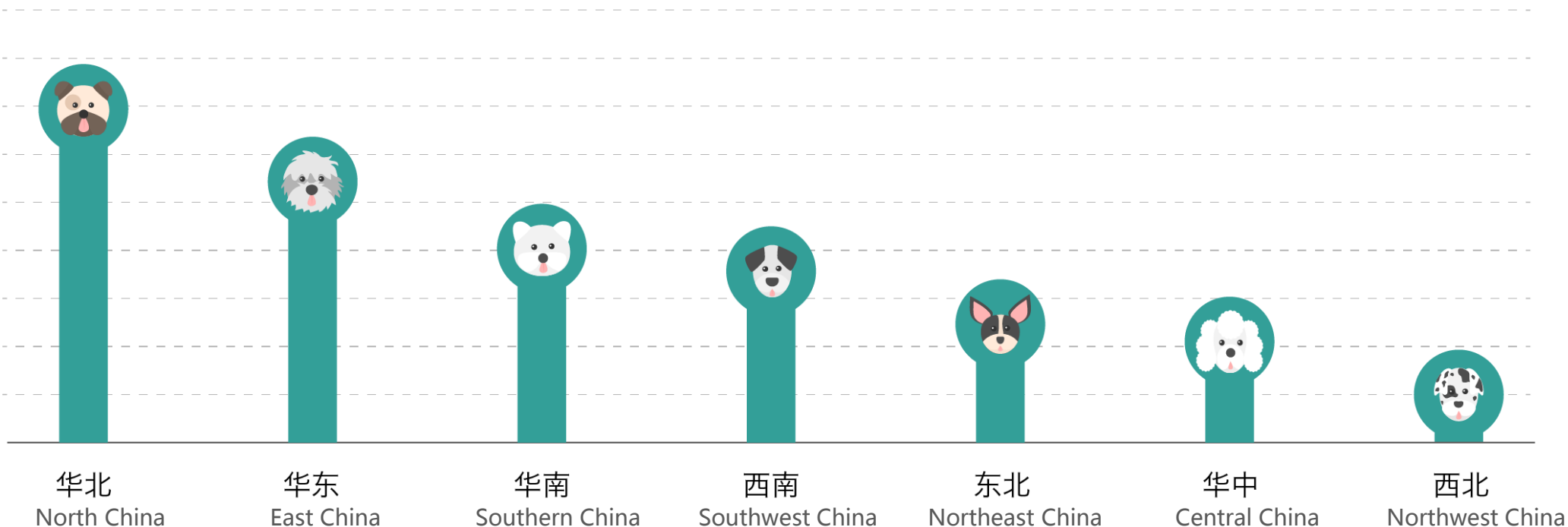


## 华北、华东、华南地区宠物消费进入前三

Top 3 consumption regions: North China, East China, Southern China

### 不同经济区域消费总金额

Total Sum of Consumption in Different Regions



Top 3 are north China, east China, south China, the sum of consumption of southwest China and northwest China are lower.

从消费金额来看，前三甲为华北、华东、华南，其次是西南，西北的消费金额较低



## 一二线发达城市宠物经济快速发展 小城镇相对增幅快

### Fast growth in 1 and 2-tier cities, with great potential in towns

据相关数据显示，我国宠物消费热点市场主要分布在一二线城市，尤其在宠物医疗、宠物美容、宠物服装等方面，发达城市的接受度更高。Data demonstrates that the consumption hotspots mainly locate in 1- and 2-tier cities. People in developed cities have higher acceptance of pet medical care, pet grooming, pet clothing and etc.

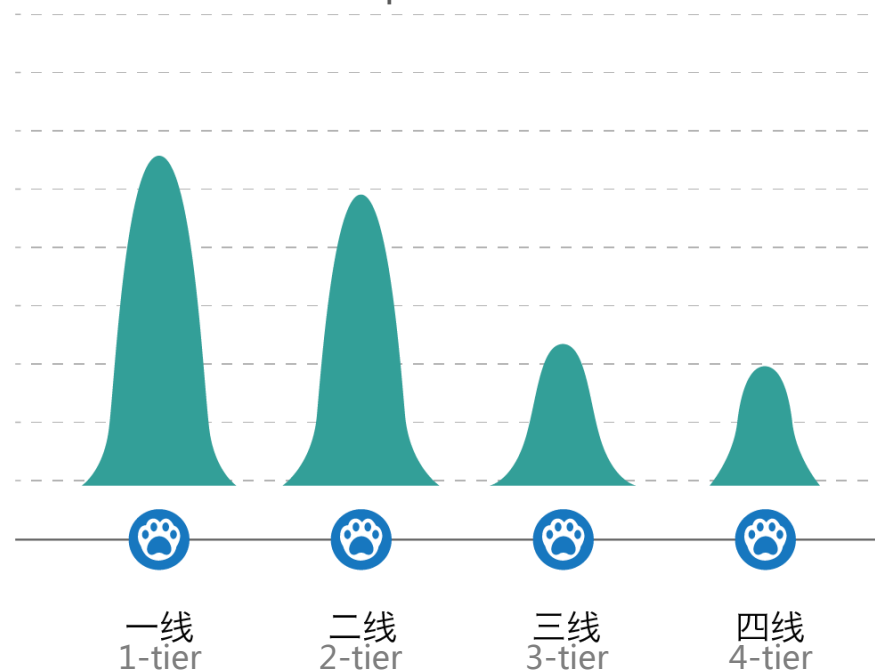


不过随着我国经济水平提高，人均可支配收入上升，电商巨头们纷纷“渠道下沉”，社会对宠物的关怀氛围愈加浓厚，三四线城市刚刚兴起的宠物经济将迎来爆发。With the enhancement of Chinese economic level and per capita disposable income, e-commerce giants' channels start sinking. The public be more interested in pets, and the pet economy in 3- and 4-tier cities begins rising.



#### 不同城市等级消费总金额

Total Consumption in Different Cities



# 03 谁在为“爱宠消费”买单？

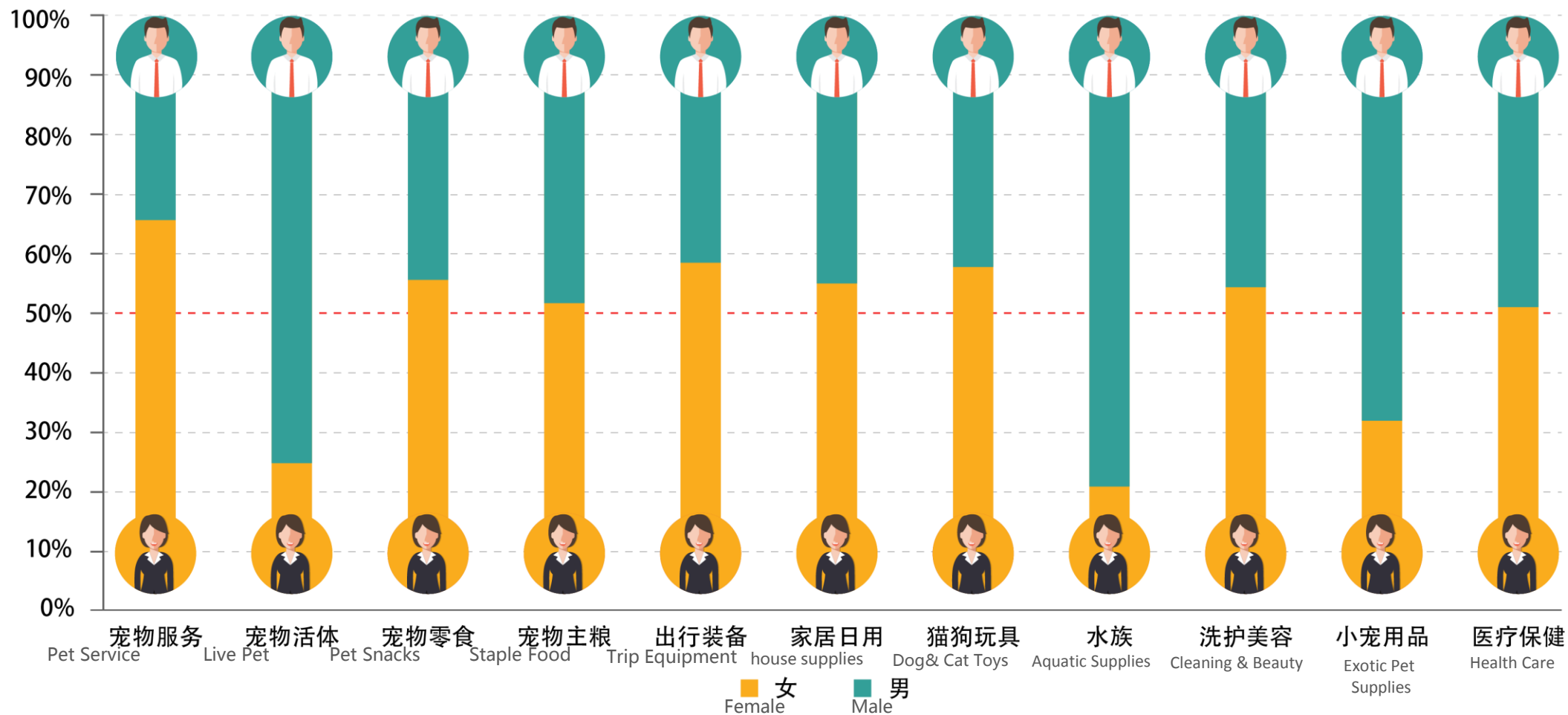
Who are these customers?



## 女性消费者爱给宠物打扮 男性消费者更关注“水族”和“小宠用品”

### Female likes pet make-up while male prefer aquatic animals and tiny pet products

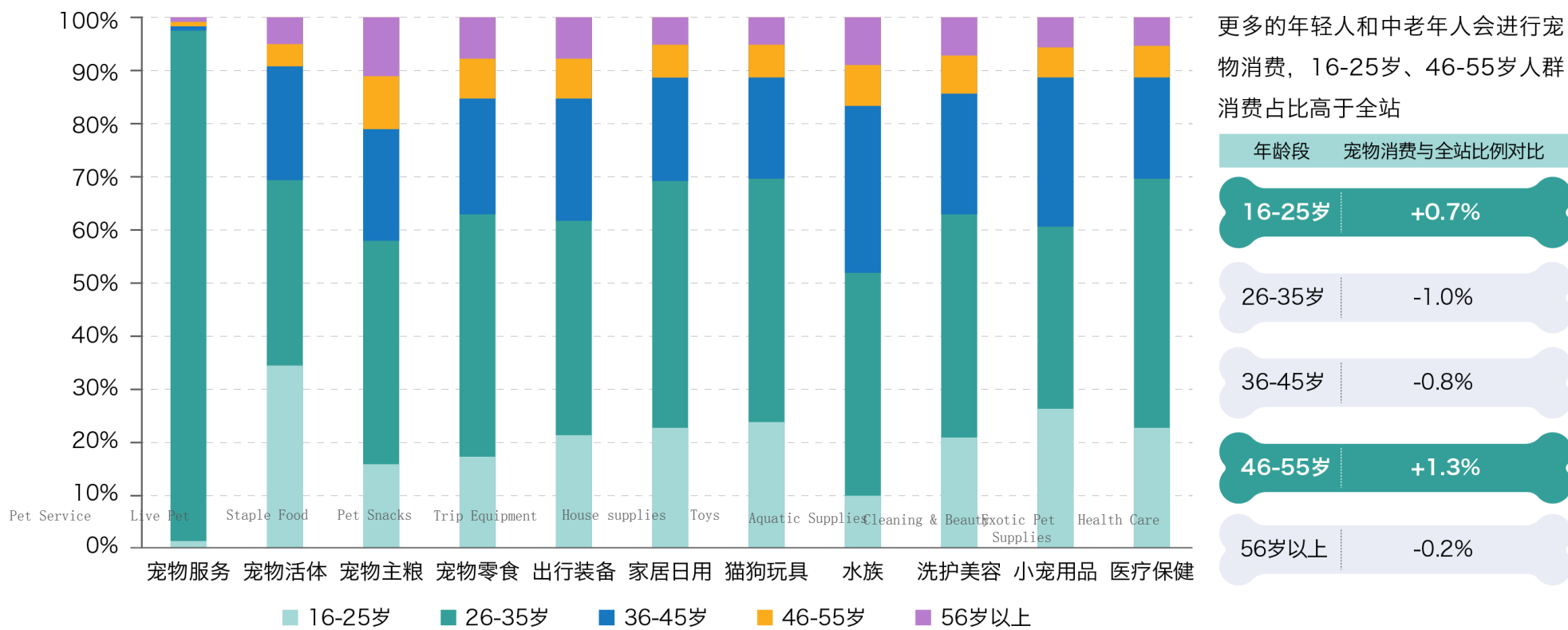
显而易见，女性宠物主的数量明显高于男性宠物主，而对于爱宠的关怀，女性也显得更有爱心和耐性。与别的榜单类似，哪怕是对待宠物方面，女性对于“颜值”消费的偏好还是大大高于男性。It is obvious that the amount of female pet owners is bigger than male pet owners. At the same time, female owners are more patient and take more care about their pets and they pay more attention to the appearance of products.



# 宠物服务类消费聚焦在26-35岁人群

## Major age group of pet service consumption is 26-35

在新兴的宠物服务市场，26—35岁人群占领绝对优势，这也说明了年轻人对新鲜事物的接受程度较高，更愿意为服务花钱。与全站对比来看，16-25岁、46-55岁年龄段的宠物消费比例均略高于全站，宠物消费人群的年龄结构更为均匀。In the burgeoning pet service market, consumers that ages at 26-35 are the majority, which shows young people have the higher acceptance towards new things and prefer to spending money on service. Compared with the whole website, consumers that ages at 16-25, 46-55 take up the higher consumption proportion. The age structure of the consumers are more averaged. “空巢青年”和“空巢中老年人”都愿意养宠物陪伴自己，宠物的陪伴属性更加明显，已被普遍视作家庭中的一员。“empty-nest youths” and “empty-nest middle-aged people” like being accompanied by pets and the pets are regarded as the family members.





## 中等收入及以上人群更爱为宠物花钱

### Mid and high income people spend more on pets

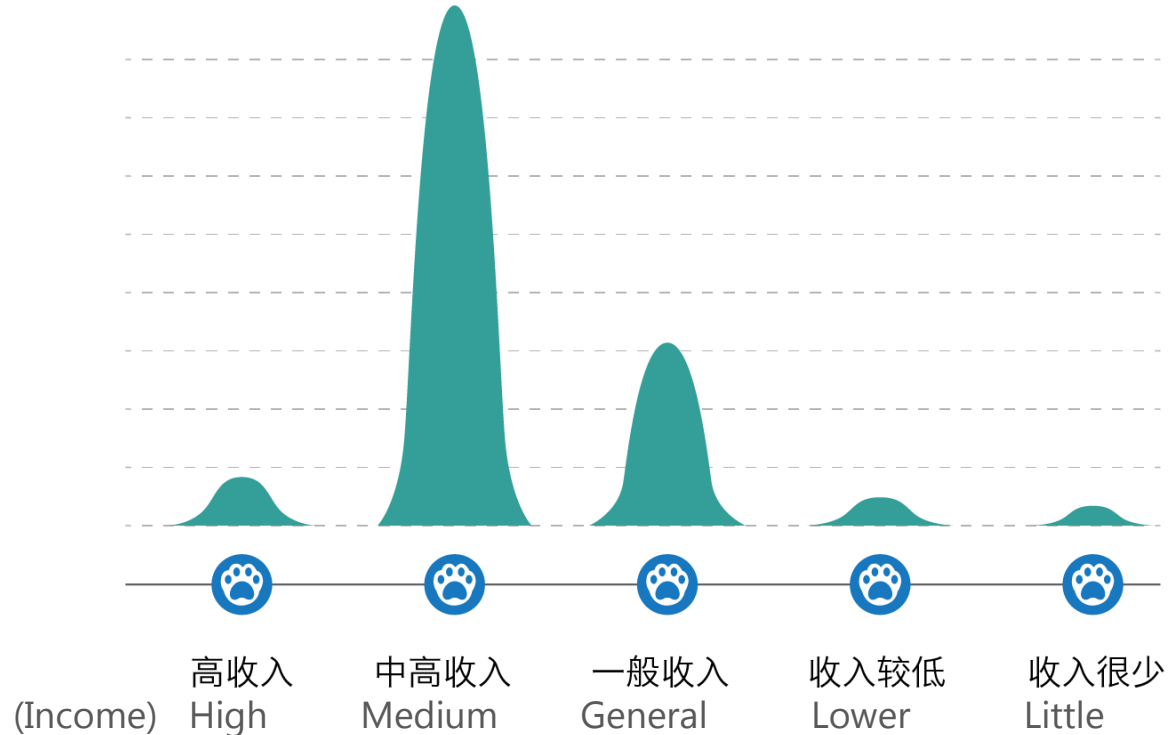


收入较高（高级白领）在宠物方面的消费金额最大，其次是一般收入（小白领），收入很少的人群在宠物方面的消费金额明显较低。

Higher income (senior white collars) have the largest spending amount on pets, followed by general income (small white collars). People with low income have significantly lower spending amount on pets.

#### 不同人群消费金额

Sum of Consumption of different consumers



More medium income people spend on pets; the proportion of medium and general income people is the higher than the proportion of JD.com 更多的中等收入人群会进行宠物消费，中高收入、一般性收入人群消费占比高于全站

Type	Proportion
人群类型	宠物消费人群与全站比例对比
中高收入 Medium	+7.90%
一般收入 General	+5.69%

## 未婚人群比已婚人群在宠物身上的花费更大

### Unmarried people spend more than married ones

随着城镇化进程推进带来的人口结构的巨大变革，空巢青年和晚婚晚育人群逐年增多，养宠情感需求稳步上升，加之消费升级驱动，未婚人群的宠物花费更多。

With the huge changes in population structure brought about by the urbanization process, the number of empty nesters and the population of late marriage and late childbearing is increasing year by year, and the emotional demand for pet care is rising steadily. In addition, driven by consumption upgrade, unmarried people spend more on pets.

#### 不同婚育状态人群宠物消费金额占比

Consumption proportion of different marital status



未婚  
Unmarried



已婚  
Married

More unmarried people like keeping pets; the proportion of unmarried people is the highest

更多的未婚人群爱养宠，未婚人群宠物消费比例大幅高于全站

婚否 Marital status	宠物消费人群与全站比例对比 Proportion
未婚 Unmarried	+23.64%

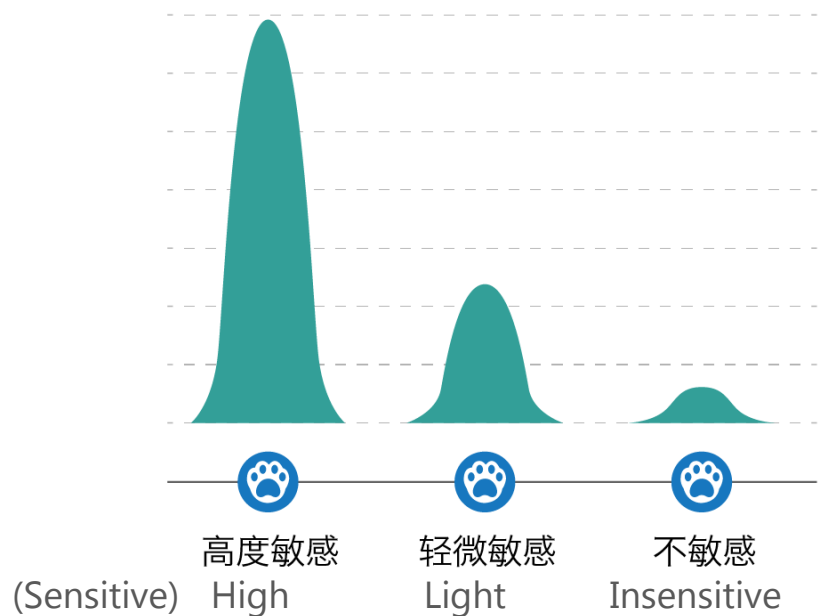
## 对评论高敏感的人群更关注宠物消费信息

### People highly sensitive to comments concern more about pet consumption experience

宠物购买人群中，对评价高度敏感的人比例较高，他们重视评价，重视宠物体验，且比例高于其他人群。The proportion of pet buyers who are highly sensitive to evaluation is higher. They focus on evaluation and pet experience, and the proportion is higher than other people.

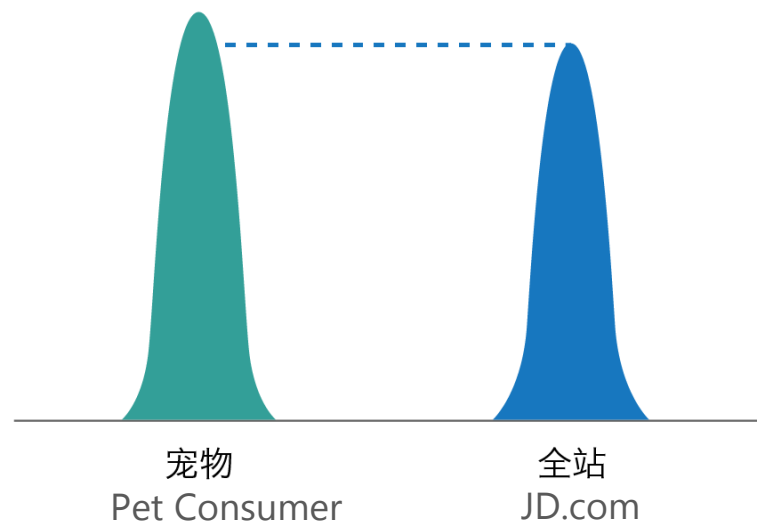
#### 不同评价敏感度人群宠物消费金额

Sum of consumption of different people who are sensitive to comments at different degrees



#### 高度敏感 High sensitive

宠物消费人群对评价敏感度高于全站



## 哈士奇、加菲猫成为最受欢迎的狗狗、猫咪品种

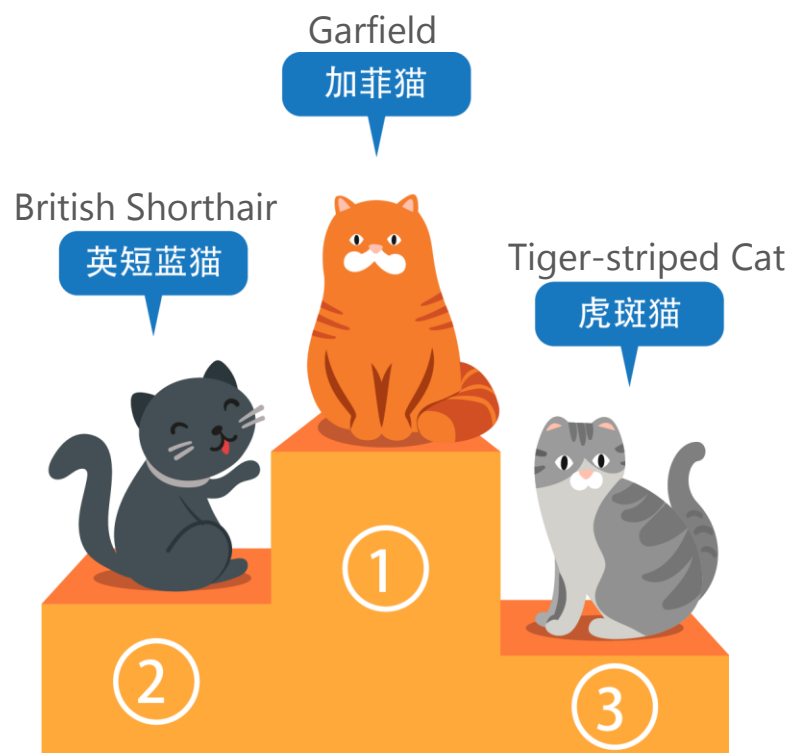
### Most popular dog breed: Husky; most popular cat breed : Garfield

拥有清奇独特相貌的哈士奇和加菲猫成为了最受欢迎的狗狗、猫咪品种；不同的是加菲猫安静又活泼的性格惹人爱，哈士奇活泼好动常犯二。

Huskies and Garfield, with their distinctive looks, become the most popular breeds of dogs and cats. Garfield is quiet and active. Husky is little silly.



最受欢迎的狗狗品种TOP 3  
Top 3 most popular types of dogs



最受欢迎的猫咪品种 TOP 3  
Top 3 most popular types of cats



## “猫奴” “会享受” “狗奴” 更爱喝一杯

### Cat fanciers focus more on high quality of life, dog lovers enjoy life with more FMCG products

从购买猫粮、狗粮的消费人群关联购买热门商品来看，养猫人群更加关注科技类商品，而养狗人群则更加生活化，购买了更多的酒类、糕点、进口牛奶等。It can be seen from the association of consumers who buy cat food and dog food to buy the popular goods, the cat owners pay more attention to the science and technology goods, while the dog owners are more lifelike, and buy more wine, cakes, imported milk and so on

#### “猫奴” 过得更智能

Cat feeders prefer smart products



高端吸尘器  
High-end vacuum cleaner



扫地机器人  
floor mopping robot



15.6英寸游戏笔记本电脑  
15.6 inches laptop



投影仪  
Projector



单反相机  
Digital Single Lens Reflex



#### “狗奴” 更享受生活

Dog feeders prefer entertainment

60英寸4K智能电视  
4K smart TV



白酒  
Liquor



糕点  
Cakes



电动牙刷  
electric toothbrush



进口牛奶  
Import milk

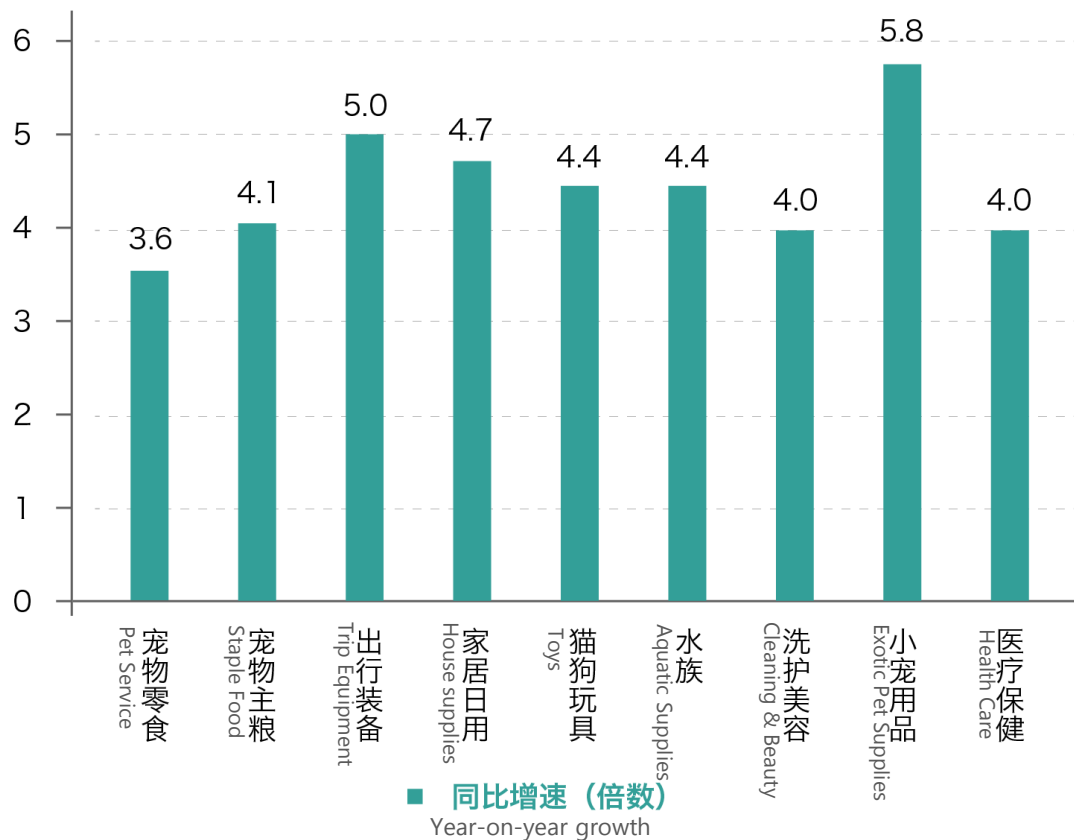


# PLUS会员宠物消费增速快

## Fast growth of PLUS member consumption

京东PLUS会员目前数量已经突破1000万，他们在宠物消费上也是“不遗余力”，宠物出行装备及小宠用品的消费金额达到2017年同期的5倍以上。北京、广东、上海的PLUS会员宠物花费更多。The number of JD PLUS members has exceeded 10 million, and they are also "sparing no effort" in pet consumption. The amount of spending on pet travel equipment and small pet products has reached more than five times that of the same period in 2017. PLUS members in Beijing, Guangdong and Shanghai spend more on pets.

2018年H1对比2017年H1



### PLUS会员宠物消费TOP10地区

TOP 10 regions of PLUS member consumption

- |                   |                  |
|-------------------|------------------|
| ① 北京<br>Beijing   | ⑥ 辽宁<br>Liaoning |
| ② 广东<br>Guangzhou | ⑦ 山东<br>Shandong |
| ③ 上海<br>Shanghai  | ⑧ 河北<br>Hebei    |
| ④ 江苏<br>Suzhou    | ⑨ 浙江<br>Zhejiang |
| ⑤ 四川<br>Sichuan   | ⑩ 天津<br>Tianjin  |



04

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# 宠物消费趋势

Pet Consumption Trend

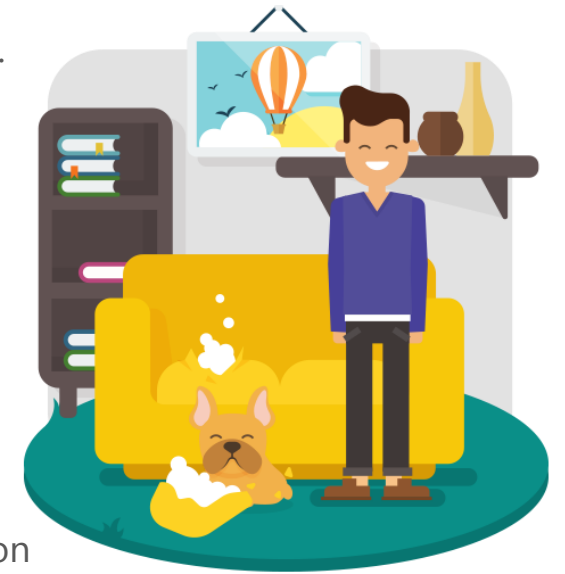
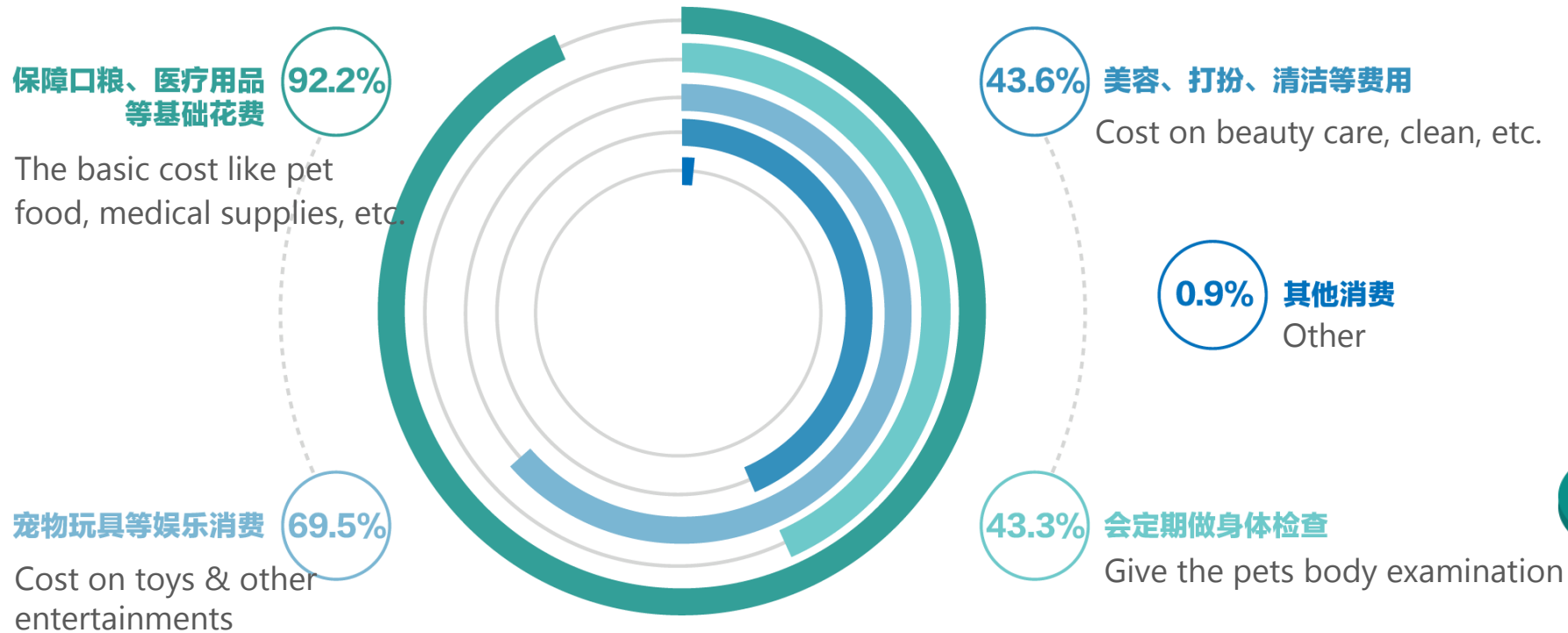
## 趋势一：消费升级-七成消费者愿意为宠物娱乐买单

### Trend One: Consumption Upgrade-70% consumers pay to entertain the pet

宠物生活丰富多样，除了口粮、医疗用品等基础性的宠物消费外，更多的消费者愿意购买宠物玩具，让宠物们得到更好的陪伴。Pet life is diversified. In addition to basic pet consumption such as staple food and medical supplies, more consumers are willing to buy pet toys, so that pets can be better accompanied.

#### ◆ 关于养宠，您的消费态度是？（可多选）

What is your consumption attitude towards pet? (Multiple Choice)



\*数据来源：京东调研数据

## 趋势一：消费升级-进口品牌受青睐，服务性消费激增

### Trend One: Consumption Upgrade-Imported brands and service consumption are becoming more popular

随着经济水平的提高，宠物越来越受重视，人们更加关注宠物食品的质量、安全和营养。同时，服务类、医疗保健类商品的消费增长也比较明显。With the enhancement of economic level, pets are more and more valued, and people pay more attention to the quality, safety and nutrition of pet food. At the same time, the consumption of service and health care products has also increased significantly.

### 进口品牌销售同比增长高于国产品牌

Imported brand sales grows faster than domestic brands

◆ 销售额高出118% Sales is 118% higher than domestic brands

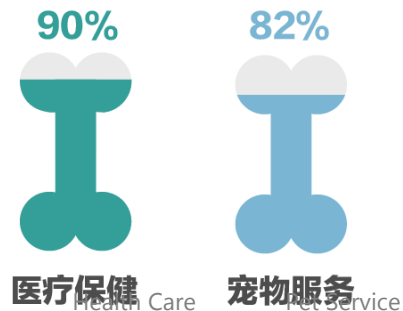
◆ 销量高出41%

Sales volume is 41% higher than domestic brands

### 医疗保健型、服务型消费增幅快

Medical care and service consumption grow fastly

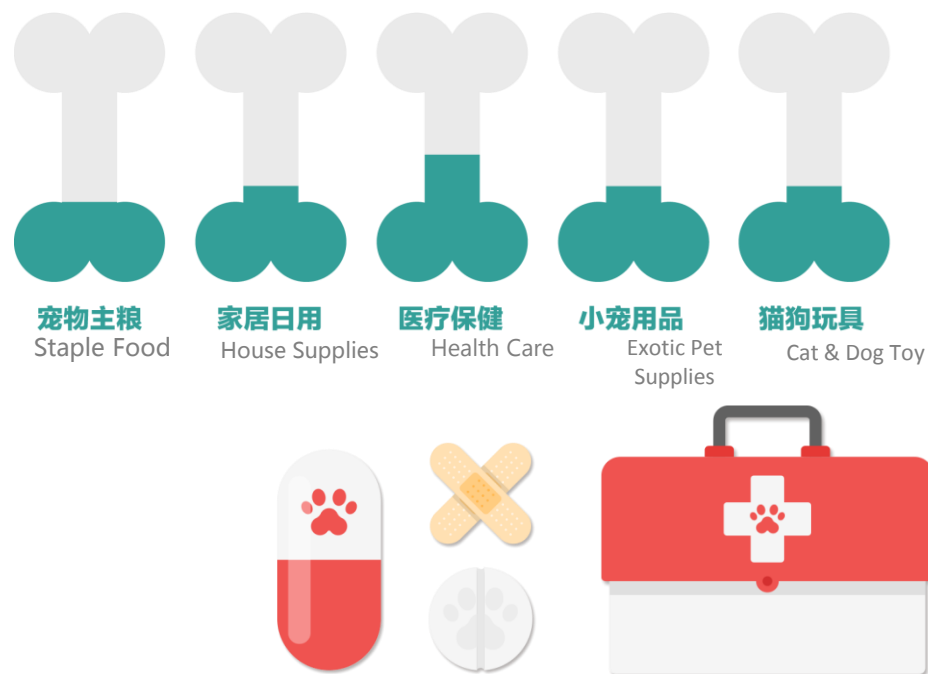
#### 2018H1环比2017H2销售额增幅



### 宠物主粮占比降低，医疗保健占比提升

Staple food is lessening, medical care consumption increases

#### 2018H1对比2017H1销售额占比变化



## 趋势一：消费升级-信任-Joy 定制款受欢迎

### Trend One: Consumption Upgrade-Trust-Customized Joy Products become popular

基于对宠物健康的关注，消费者会选择信赖的品牌、商品和平台。因为京东平台打造的出色信任感，Joy定制款商品受到消费者的广泛认可，销量迅猛提升。Based on the concern about the health of pets, consumers will choose trusted brands, products and platforms. Because of the outstanding trust created by JD platform, Joy's customized products have been widely recognized by consumers and the sales have been greatly increased.



【京东JOY定制款】宠物饮水机



【京东JOY定制款】宠物尿垫



【京东JOY定制款】中/大型成犬粮



【京东JOY定制款】麦富迪软犬粮



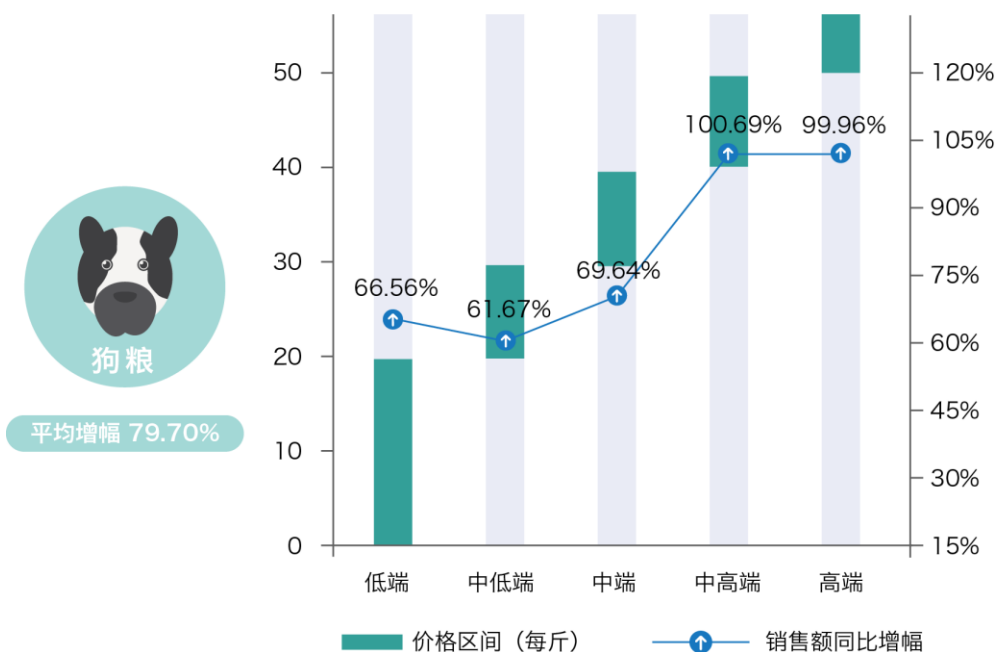
【京东JOY定制款】零食磨牙棒

## 趋势一：消费升级-猫狗基本达到“共同富裕”

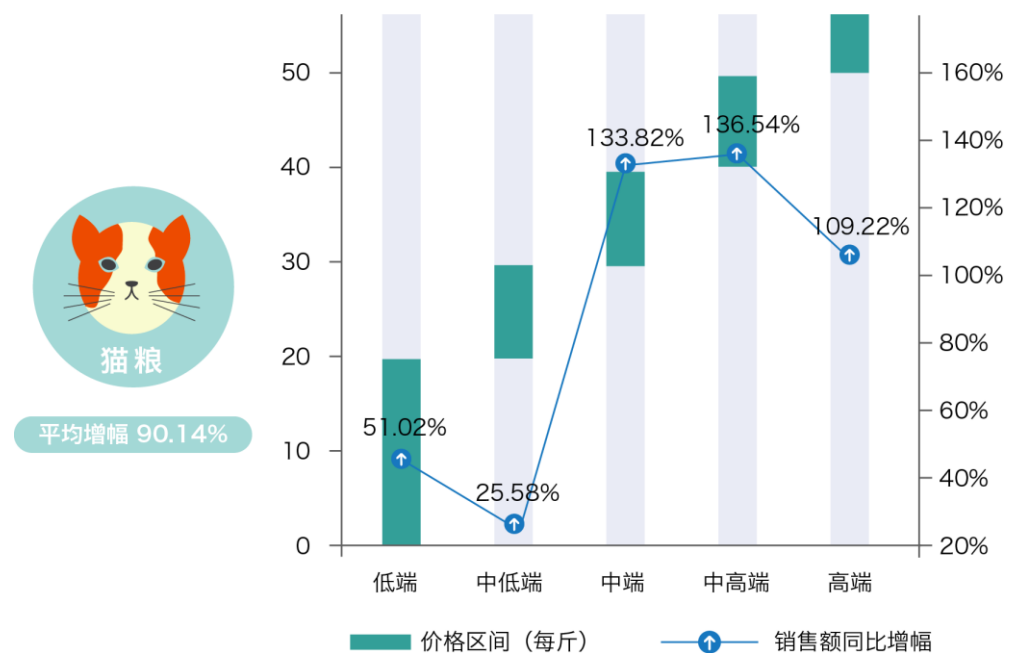
### Trend One: Consumption Upgrade-Same for cats and dogs

从每斤的狗粮和猫粮价格区间来看，中高端的口粮销售额同比增幅较高，说明消费者更愿意为爱宠购买大品牌、高品质的口粮。According to the price range of dog and cat food per catty, the sales volume of medium and high end grains increased relatively higher than that of last year, indicating that consumers are more willing to buy big brands and high-quality grains for pets.

- ◆ 从狗粮来看，中高端、高端的销售额同比增幅分别达到100.69%、99.96%，同比增长速度明显较快。
- ◆ About the dog food, the year-on-year growth of medium and high sales reach at 100.69%, 99.96%



- ◆ 从猫粮来看，中端、中高端的销售额同比增幅最高，分别达到133.82%、136.54%，而高端猫粮的同比增幅也达到109.22%。远高于低端及中低端猫粮的增速。
- ◆ About the cat food, the year-on-year growth of medium and mid-to-high end sales are the highest, 133.82%, 136.54%. The high-end year-on-year growth is 109.22%.



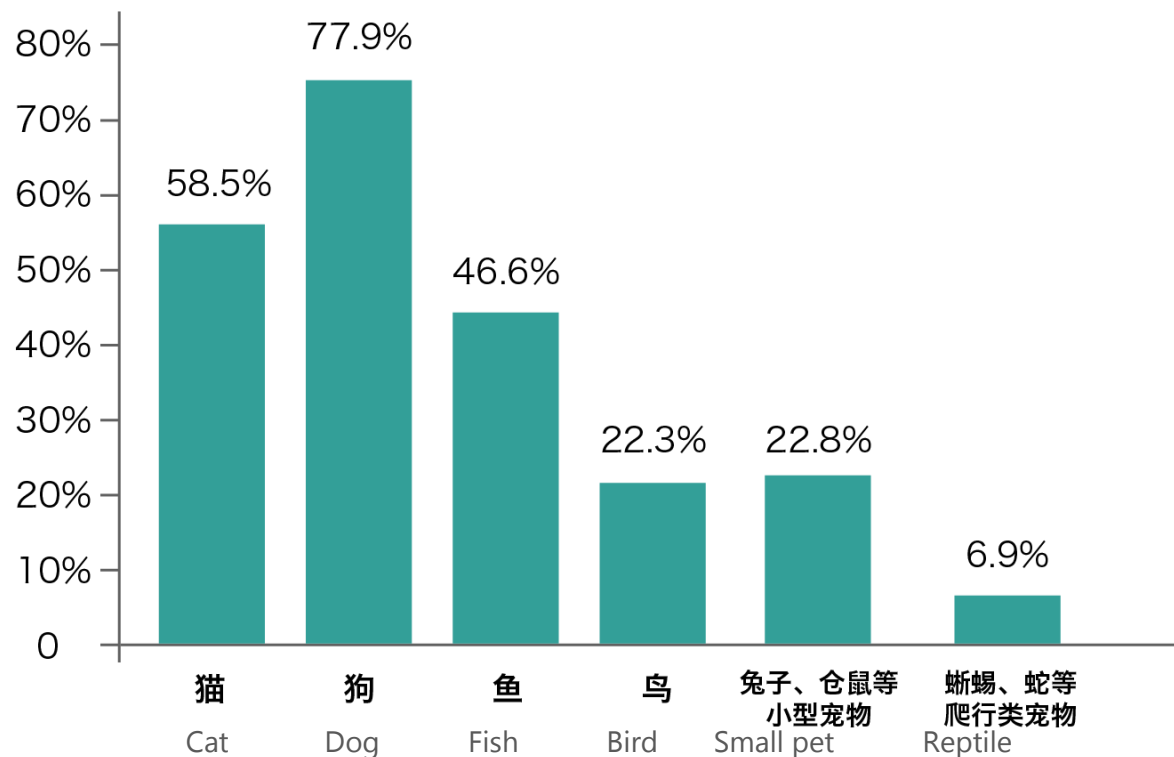
## 趋势一：消费升级-养宠类型多元发展

### One: Consumption Upgrade-Diverse species of pets

从调研数据及小宠用品的消费数据来看，除猫狗外，正有更多类型的宠物走进家庭当中，鸟类/昆虫用品的销售金额同比增幅就达到179%，仓鼠、两栖、兔子用品等消费金额也都达到90%左右。According to the survey and the consumption data of small pet products, in addition to cats and dogs, more types of pets are entering the family. The sales of bird/insect products increased by 179% year-on-year, and the consumption of hamsters, amphibians and rabbit products also reached about 90%

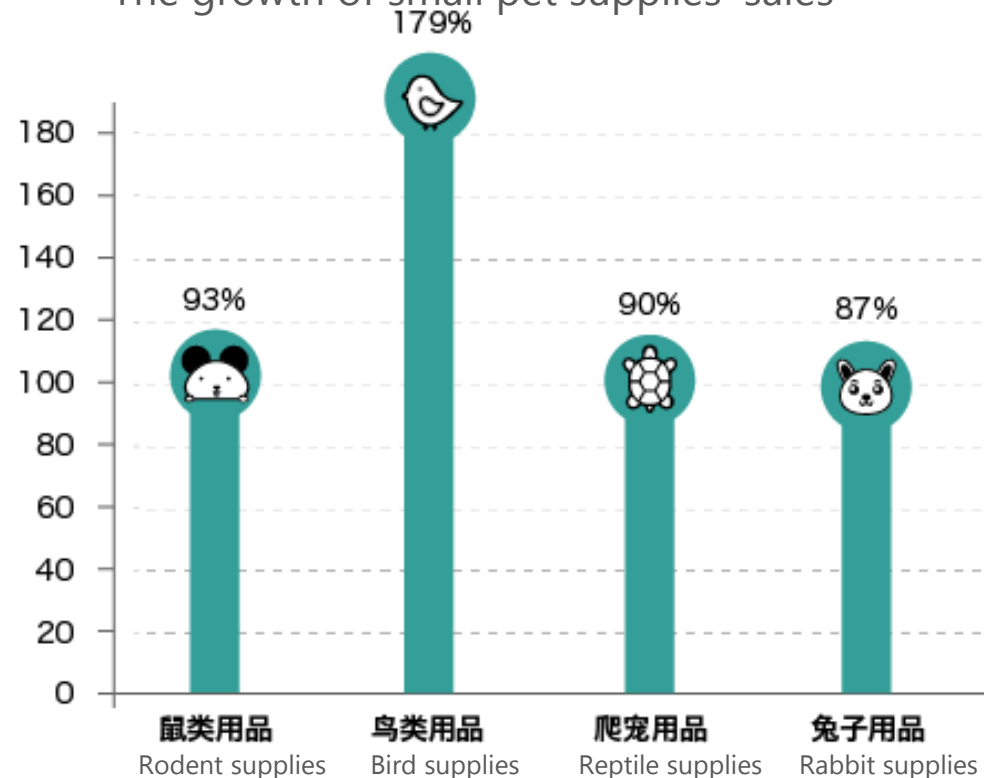
#### ◆ 您能接受哪些宠物类型？（可多选）

What kind of animals can you accept? (Multiple Choice)



#### ◆ 小宠用品的销售金额同比增幅

The growth of small pet supplies' sales



\*数据来源：京东调研数据

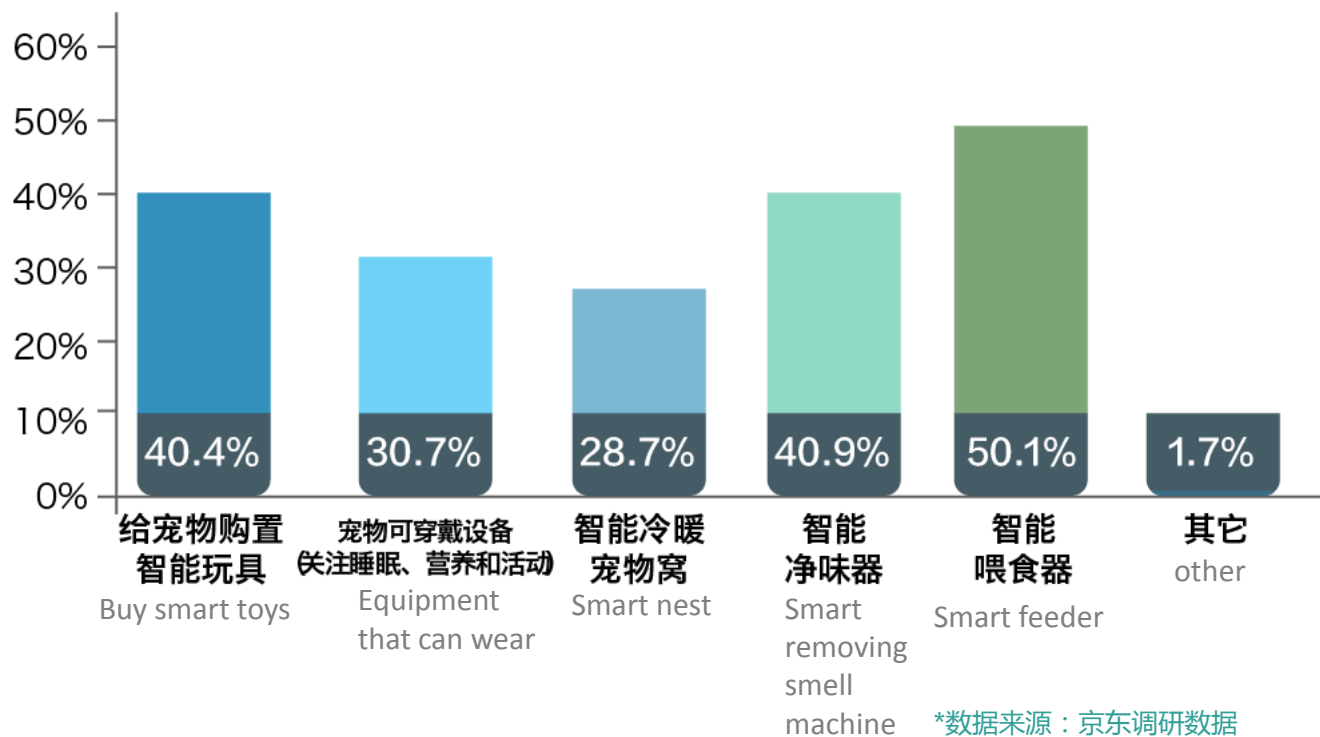
## 趋势二：养宠科学化-科技改变宠物生活

### Trend Two : Technicalization of Pet Industry- Science changes the pet industry

智能化设备备受关注，科技改变宠物生活，更多消费者愿意为爱宠购买智能玩具、净味器等。Smart equipment has attracted much attention. Technology changes the life of pets, and more consumers are willing to buy smart toys and odor purifiers for pets.

#### ◆ 现在很流行的科技养宠，你会尝试以下哪些产品？（可多选）

What technological pet products would you like to try? (Multiple choice)



\*数据来源：京东调研数据

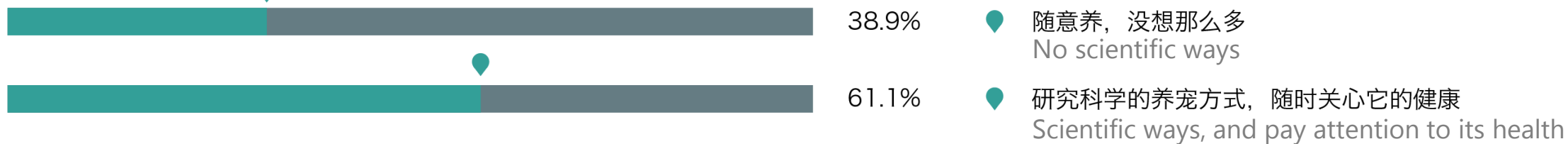


## 趋势二：养宠科学化-关注宠物健康

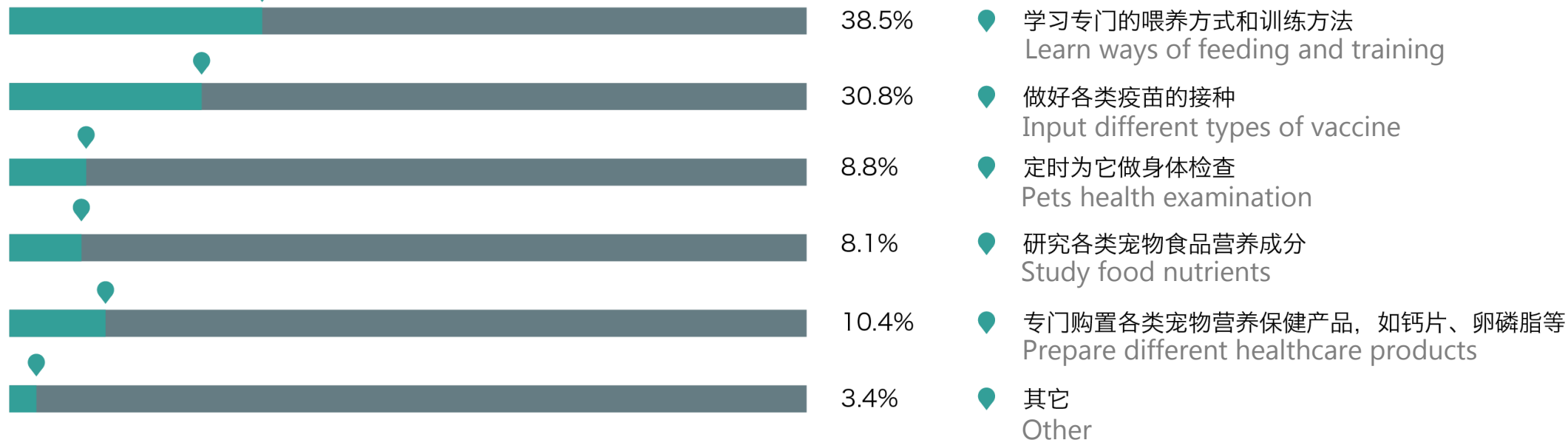
### Trend Two : Technicalization of Pet Industry-Pet health

超过60%的消费者会选择研究科学的养宠方式，关注宠物健康  
More than 60 percent of consumers choose to study the scientific way of pet keeping and pay attention to the health of their pets

#### ◆ 您对待养宠的态度是？ What is your attitude towards keeping pets ?



#### ◆ 您认为科学养宠需要做到？（可多选） What should you do to keep pets scientifically ?



\*数据来源：京东调研数据



## 趋势二：养宠科学化-重视宠物体验

### Trend Two : Technicalization of Pet-Pay attention to pet's experience

消费者购买商品时更加关注“宠物体验”，一切只为主子“心头好” Consumers pay more attention to "pet experience"

#### 医疗保健

Health Care

##### 评价关键词TOP5

- 价格实惠
- 狗狗喜欢
- 效果很好
- 宝贝超喜欢
- 质量很信赖

##### 类型

- 价格
- 宠物体验
- 效果
- 质量

#### 宠物主粮

Staple Food

##### 评价关键词TOP5

- 狗狗爱吃
- 猫咪爱吃
- 猫粮不错
- 狗粮不错
- 狗狗很喜欢

##### 类型

- 宠物体验
- 品质

#### 宠物零食

Pet Snacks

##### 评价关键词TOP5

- 狗狗爱吃
- 我家狗喜欢
- 价格便宜
- 价格实惠
- 宝贝超喜欢

##### 类型

- 宠物体验
- 价格

#### 家居日用

House Supplies

##### 评价关键词TOP5

- 猫咪喜欢
- 猫砂不错
- 没有异味
- 除臭效果好
- 吸水性好

##### 类型

- 宠物体验
- 功能

#### 洗护美容

Cleaning & Beauty

##### 评价关键词TOP5

- 狗狗使用的好
- 价格实惠
- 效果很好
- 使用方便
- 材质很好

##### 类型

- 宠物体验
- 价格
- 方便程度
- 效果
- 材质

#### 猫狗玩具

Dog& Cat Toys

##### 评价关键词TOP5

- 颜色很好看
- 材质不错
- 质量不错
- 狗狗很喜欢
- 价格实惠

##### 类型

- 颜色
- 材质
- 质量
- 宠物体验
- 价格

## 趋势二：养宠科学化-增强养宠知识

### Two : Technicalization of Pet Industry-Consumers are willing to learn more about their pet

从关联购买宠物相关图书来看，消费者愿意花时间学习宠物知识，了解宠物特性。

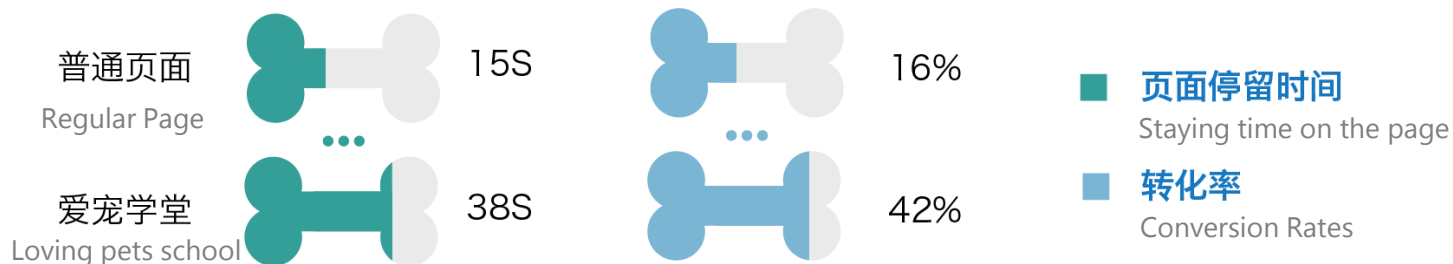
The consumers prefer learning pet knowledge and features through analyzing the books they bought.

- |                    |  |
|--------------------|--|
| ① 我的第一本养猫书         | ⑥ 狗狗不是故意的：图解全阶段养狗宝典                            |
| ② 周末驯狗计划（1周速成驯狗手册） | ⑦ 邓巴博士养狗圣经                                     |
| ③ 猫咪家庭医学大百科        | ⑧ 猫咪不是故意的：图解全阶段养猫宝典                            |
| ④ DK 世界名猫驯养百科      | ⑨ 猫语教科书  |
| ⑤ 猫语大辞典            | ⑩ 训练狗狗 一本就够了 养狗书籍 训狗教程书<br>宠物书籍 驯犬手册 养犬训犬与犬病防治 |

#### ◆ 爱宠学堂

爱宠学堂：为了更好的引导用户科学养宠，京东宠物推出了知识类系列专题《爱宠学堂》，在饮食喂养、驱虫免疫、医疗保健、家居用品、季节性护理等各方面给予专业的指导和产品推荐，普及科学养宠知识，帮用户更加了解自己的宠物并挑选更加适合的产品。

Loving pets school, a column that teach users the knowledge of keeping pets.



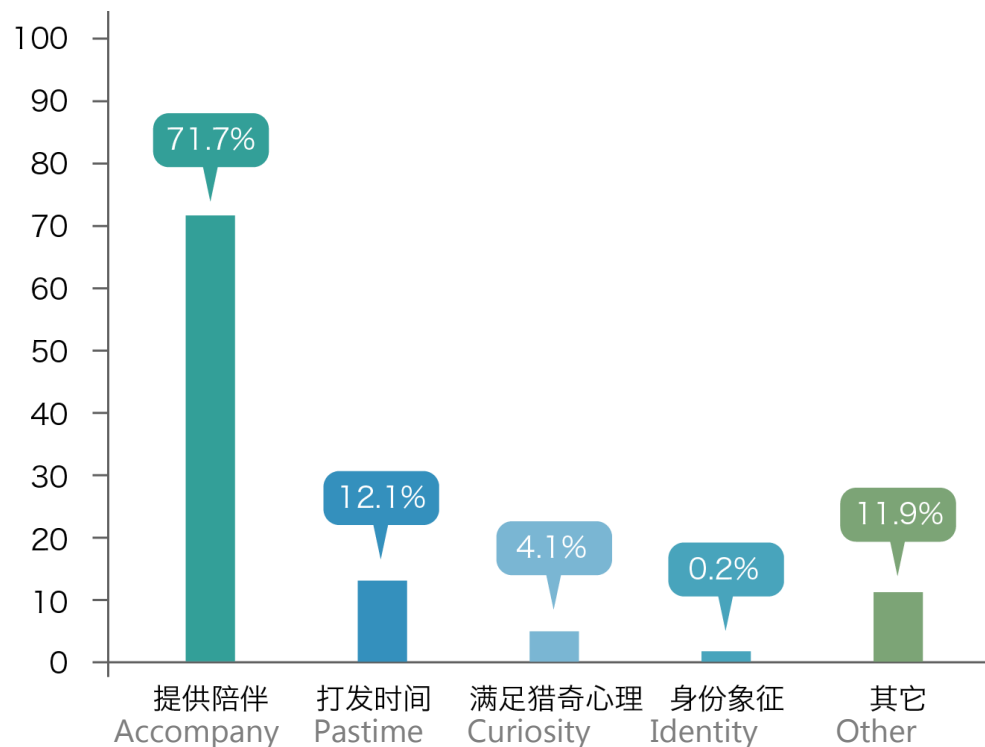
## 趋势三：宠物角色上升-为什么养宠物？

### Three: Growing status of Pet-Reasons for keeping pets

超七成消费者认为宠物可以提供陪伴，宠物角色上升，同时由于人群属性的不同，陪伴时间分布各有不同，多数选择陪伴宠物1-2小时。More than 70 percent of consumers believe that pets can provide companionship, and the role of pets increases. Meanwhile, due to the different population attributes, the companionship time distribution varies, and most people choose to accompany their pets for 1-2 hours.

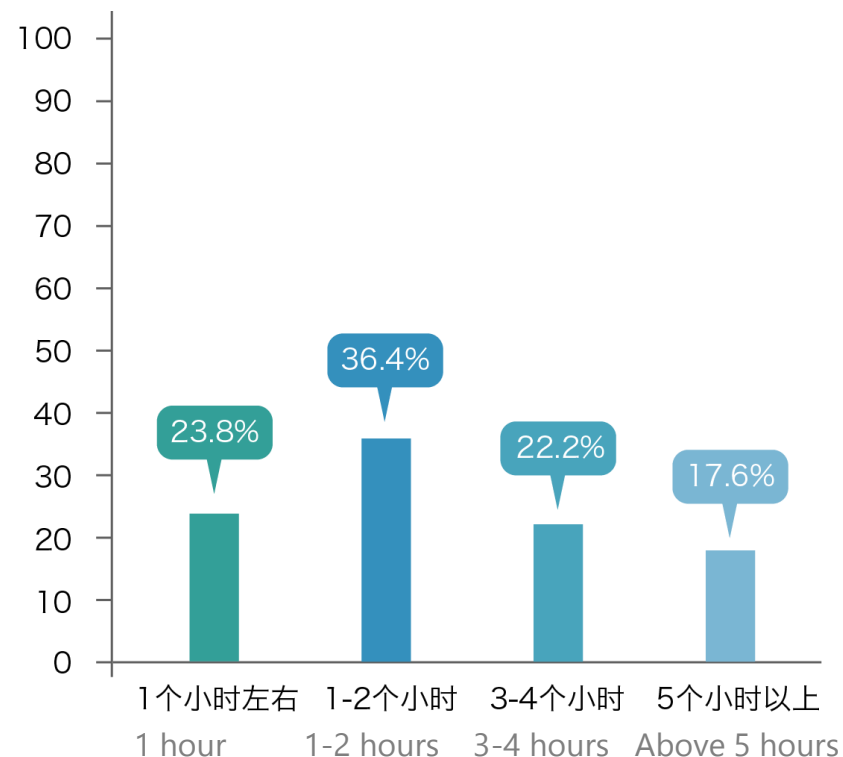
#### ◆ 您养宠主要目的是？将宠物作为家庭的一员，宠物角色上升

The main aim to keep pets is regarding them as families



#### ◆ 您每天愿意陪伴宠物多少个小时？

How long have you accompanied with your pets?



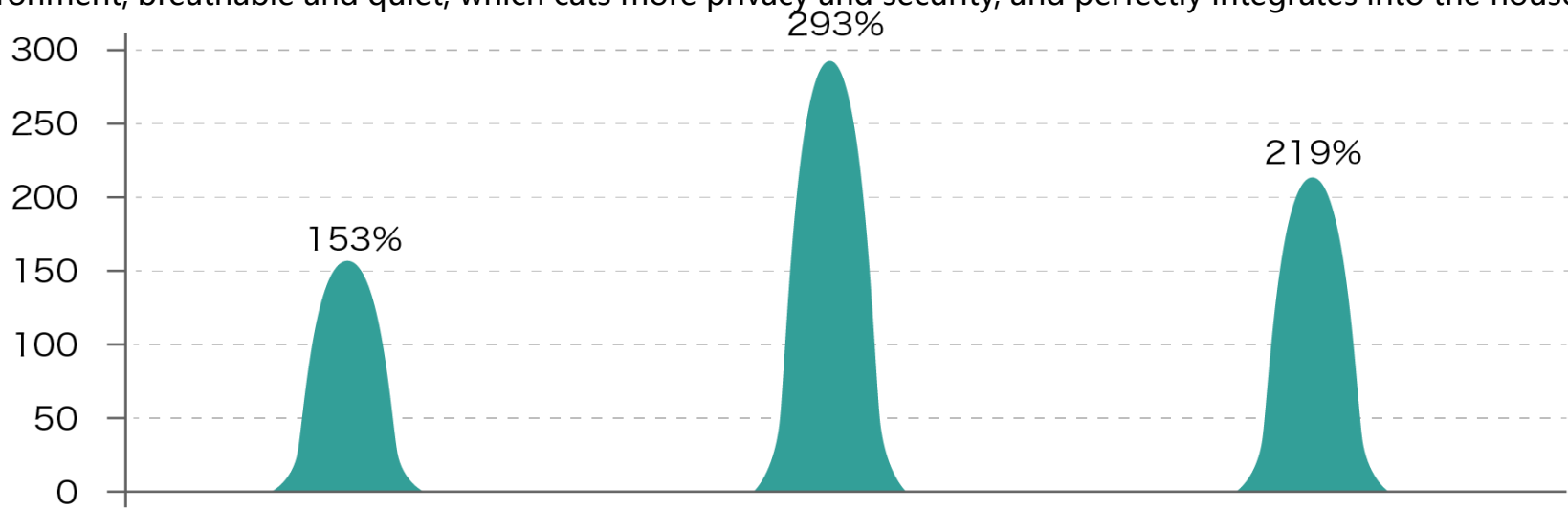
## 趋势三：宠物角色上升-宠物升级为家庭成员，宠物用品融入家居

### Three: Growing status of Pet-Pets become important family members

-- “这款智能饮水机提供了过滤洁净且富含活氧的优质水源供宠物引用，为宠物的饮水健康而设计。” The smart water dispenser provides clean, filtered and oxygen-rich water sources for pets to use, and is designed for their healthy drinking

-- “喂食碗不及时清洗会给宠物饮食埋下隐患。全新的喂食解决方案使食物不易变质。另加入称重功能，根据APP的科学喂养推荐，给予爱宠健康的饮食关爱。” "Not washing the feeding bowls in a timely manner can pose a hazard to pet diets. New feeding solutions keep food from spoiling. Add the weighing function and give the pet healthy food care according to the scientific feeding recommendation of the APP."

-- “半封闭式结构，营造弱光环境，透气安静，给猫咪更多私密和安全感，完美融入不同风格家居环境。” The semi-closed structure creates a weak light environment, breathable and quiet, which cats more privacy and security, and perfectly integrates into the household environment of different styles.



小佩petkit宠物智能饮水机 猫咪狗狗饮水器 白色  
小佩petkit智能抗菌称重碗 猫狗盆猫狗碗狗狗猫咪用品小奶牛  
pidan雪屋猫砂盆全封闭式 猫厕所大号除便盆白色

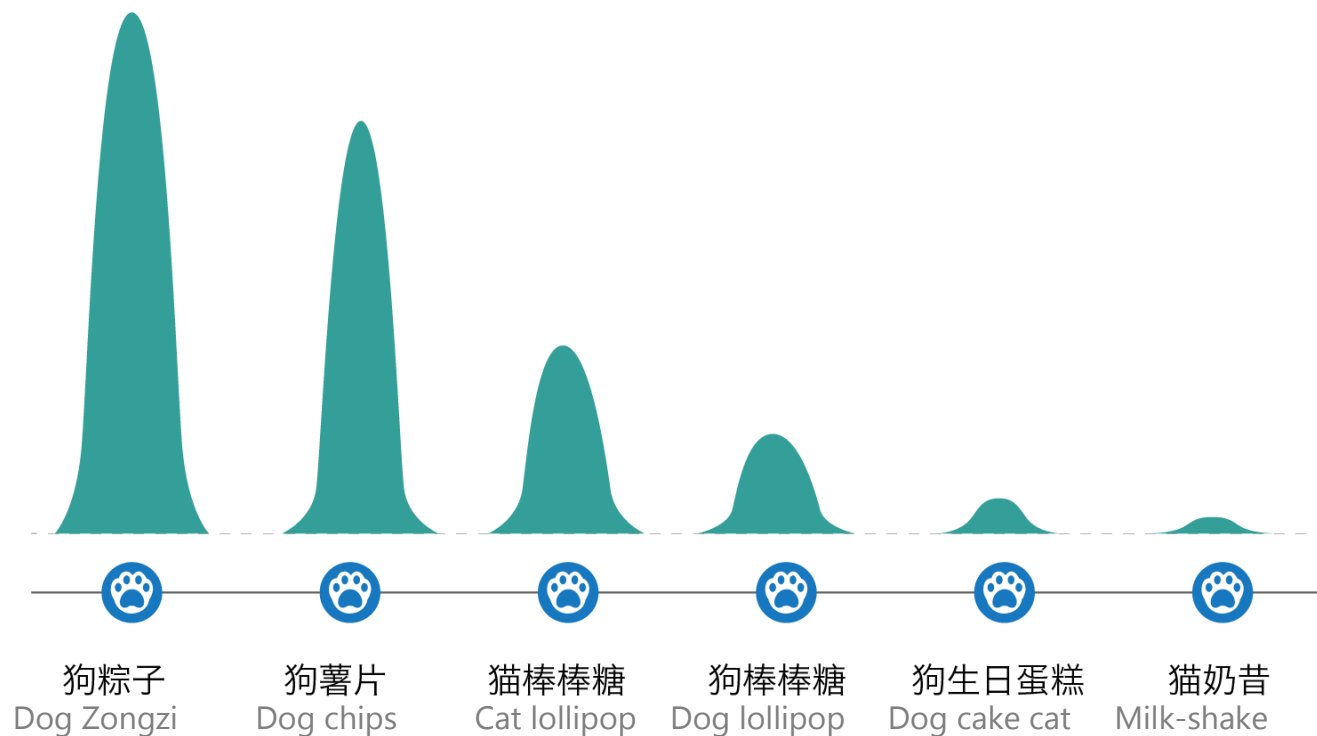
■ 销售额同比增长  
Year-on-year growth of sales



## 趋势三：宠物角色上升-宠物食品兼具零食属性，更加多元化、拟人化

### Three: Growing status of Pet-Diversified pet food

从关键词搜索量来看，与狗狗相关的关键词“狗粽子”、“狗薯片”的搜索量同比增长倍数较多，分别为同比增长57倍、45倍，与狗狗相关的食品拟人化关键词比与猫猫相关的关键词搜索增长更快。In terms of keyword search volume, the search volume of "dog zongzi" and "dog potato chips" related to dogs was increased by more times than that of the previous year, respectively 57 times and 45 times. Personified keywords related to dogs increase faster than the keywords related to cats.



## 趋势三：宠物角色上升-为爱宠购置保险

### Three: Growing status of Pet-Buying insurance for pets

随着宠物数量的增加，宠物医疗、手术等费用的增长，宠物主人在医疗方面的支出压力不断增大，客观上刺激了宠物主人的保险需求。

宠物地位的提高，从主观上增加了宠物主人的保险需求，使得宠物保险潜在投保范围也将进一步扩大。With the increase of pets, the cost of pet medical treatment and surgery, pet owners have big pressure on spending money on pet medical treatment, which objectively stimulates the insurance demand of pet owners. The enhancement of pet status increases the insurance demand of pet owners subjectively, so the potential coverage of pet insurance will be further expanded.

#### “守护爱犬”宠物责任险和“守护爱宠”宠物意外险

“Safeguard the dogs” Liability Insurance “Safeguard the pets” Accident Insurance

##### “守护爱犬”宠物责任险

当猫猫狗狗闯祸了，比如把别人咬了、把物品弄坏了等等（主人的物品除外），它都能赔。

京东价 99块，保额30万

¥

##### “守护爱宠”宠物意外险

当猫猫狗狗出现了意外，比如被车撞了、摔伤了等等，都能获赔。

199元档年最高赔付5000块  
299元档最高赔付10000块

#### “尝新特权”

Test New Privilege

如果用户在下单的同时还购买了增值保障里的“尝新特权”，那么买到的主粮开封后，即使自家宠物不愿意吃或者吃后有异常反应，只要符合保障要求的都可享受无条件退货。专门用来解决主粮开袋后爱宠对口味不感冒，或是吃后有异常反应这个痛点。

This “Privilege” provide our users with the service that you can return the staple food unconditional if your pets do not like it or be sick with it even though you have opened the products.

“

## 宠物消费关键词

Key Words

- **信任升级** -

Trust Upgrade

- **科学养宠** -

Technicalization

- **亲情陪伴** -

Family Companionship

”



扫描二维码关注“京东宠物园艺”  
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谢谢观看