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# Pet Grooming Services: United States

April 2018



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# About This Report

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## Scope

This report forecasts to 2021 US pet grooming service sales in nominal US dollars. To illustrate historical trends, total sales are provided for 2013 and 2017.

Other data covered in this report include:

- US top pet service types in the last 12 months versus the last 30 days for the percentage of dog versus cat owners, 2017
- percentage of US dog or cat owners who took pets to a pet superstore in the last 12 months, 2016 versus 2017
- US grooming service percentage of pet owners whose pets have been groomed in the past 12 months, 2018

For the sake of brevity, the report refers to the combination of pet grooming and spa services as “pet grooming services” throughout the discussion.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

A full outline of report items by page is available in the Table of Contents.

## Sources

*Pet Grooming Services: United States* (FF95070) is based on *Pet Grooming, Skin & Coat, and Spa Products and Services in the U.S.*, a comprehensive industry study published by Packaged Facts. The information contained in that report was obtained from primary and secondary research. Primary research included national online consumer surveys of US adults (age 18+) that Packaged Facts conducts on a regular basis to measure consumer purchasing patterns and attitudes for various products and services. These proprietary Packaged Facts surveys have a sample size of approximately 2,000, screened for response quality, and representative of the US population on the demographic measures of age, gender, geographic region, race/ethnicity, household income, and the presence/absence of children in the household.

## About This Report

Consumer analysis also drew on national consumer survey data licensed by Simmons Research. On a quarterly basis, Simmons releases 12-month aggregations of booklet-based survey results from a large and random sample (approximately 25,000 for each quarterly release) that accurately represents the US population. This database allows for historical trending and detailed consumer profiles across various demographic and psychographic measures as well as product and service categories.

The analysis in that report also drew, as a background source, on retail sales tracking data as available from IRI and Nielsen (for mass-market channels) and SPINS (for the natural channel).

Primary research also included interviews with pet market experts; participation in pet industry events including the American Pet Products Association's Global Pet Expos (through 2018), and other meetings and forums relevant to the pet products industry. Packaged Facts also conducted on-site examination of retail and service provider venues and extensive internet canvassing of the activity of pet product manufacturers, distributors, and retailers. Secondary research included information- and data-gathering from consumer business and trade publications, company profiles in trade and consumer publications, and information culled from Packaged Facts' extensive pet market research database and report collection.

Estimates of market size and company performance were based on reported revenues of pet product manufacturers and retailers, information from industry experts, surveys of independent and chain pet store retailers, government data including US Bureau of Labor Statistics *Consumer Expenditure Surveys*, and figures from other market research sources.

Analysis of retail channel trends, pet product usage, and other consumer trends relied on the Packaged Facts proprietary pet owner surveys noted above and on cross-tabulations of consumer survey data compiled by Simmons. Consumer trend analysis also took into account data from the American Pet Product Association's biennial *National Pet Owner Surveys*.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 6 | NAICS & SIC Codes Related to Pet Grooming Services

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
541940	Veterinary Services	0742	Veterinary Services for Animal Specialties
812910	Pet Care (except Veterinary) Services	0752	Animal Specialty Services, Except Veterinary

Source: US Census Bureau

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## Resources

### Packaged Facts

*Pet Grooming, Skin & Coat, and Spa Products and Services in the U.S.*

### The Freedonia Group

#### Freedonia Industry Studies

*Global Housing*

*Label Markets in the US*

*Pouches in the US*

#### Freedonia Focus Reports

*Demographics: United States*

*Durable Petcare Products: United States*

*Pet Clean-Up & Odor-Control Products: United States*

*Pet Food: United States*

*Pet Insurance: United States*

*Pet Medications: United States*

*Pet Oral Care: United States*

*Pet Products & Services: United States*

*Pet Supplements: United States*

*Pet Treats & Chews: United States*

#### Freedonia Custom Research

### Trade Publications

*Grooming Business*

*Pet Age*

*Pet Business*

*PetGroomer.com*

*Pet Product News International*

*Veterinary Practice News*

### Agencies & Associations

American Pet Products Association

International Professional Groomers

International Society of Canine Cosmetics

National Dog Groomers Association of America

Professional Pet Groomers & Stylists Alliance

United States Bureau of Labor Statistics

World Pet Association