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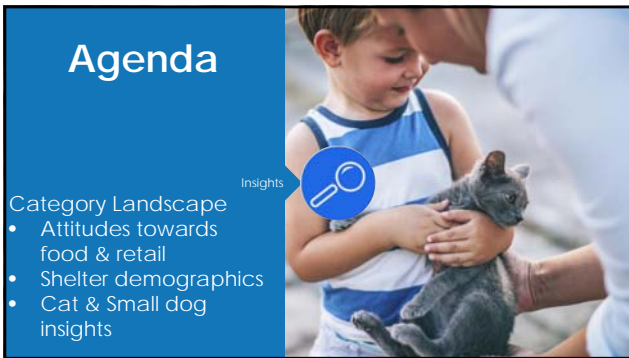
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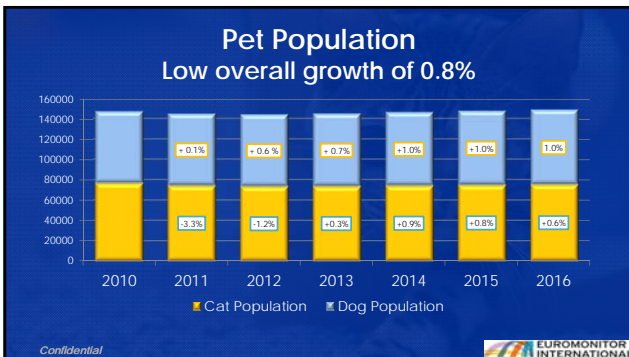
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### Pets are increasingly the baby in the household




On average there is 1.2 pets per household in the USA vs 0.6 children

"in a survey by the American Animal Hospital Association, 40 percent of married female dog owners reported they received more emotional support from their pet than from their husband or their kids"

*Confidential*

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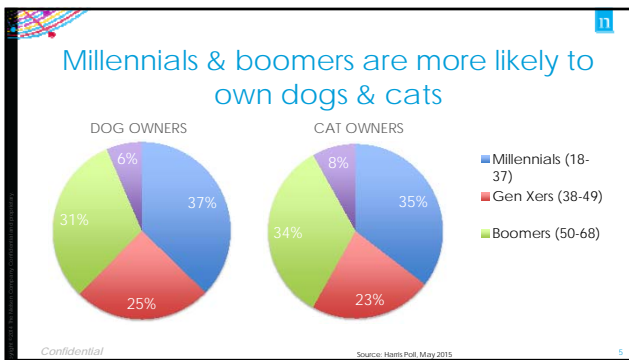
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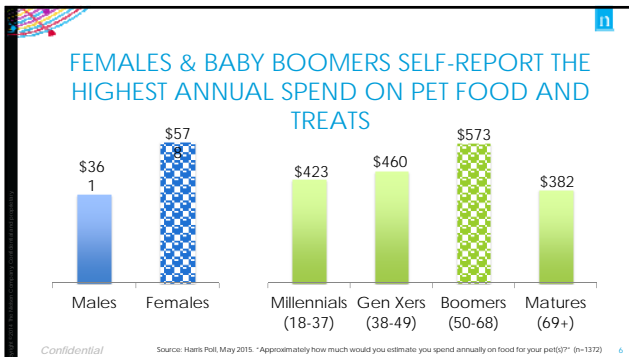
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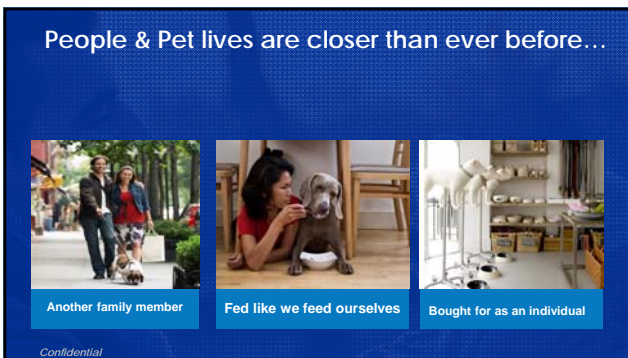
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### What pet shoppers get...



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### WHAT APPEARED TO HAVE BEEN LOYALTY *may have always, only been "repeat business"*



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### Owners are misinformed

There's a **knowledge gap** about what great nutrition actually means for Pets and **the risks** if this isn't properly managed.

2/3 of pets have special needs but only 10% are fed an appropriate diet

Many pets even on a 'good' diet are being overfed - or over treated!



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### Leading to suffering for the Pets of America

The percentage of U.S. pets that are **obese** or **overweight** has increased

**>54%** of pets are now obese

Since 2001: Dog vet visits have slipped 21% and cat visits dropped 30%

For the first time, Pets are starting to die younger again – from preventable diseases




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### Younger millennials are less likely to have pets relative to those married with kids, having a higher income and some college education; but those that do own more dogs than cats

#### Pet Parent Demographics

<b>Age</b> 18-24: 9% 25-34: 22% 35-44: 20% 45-54: 24% 55-65: 25%	<b>Gender</b> Male: 47% Female: 53%	<b>Household Composition (Mean)</b> 2.9 Individuals per household
<b>Race/Ethnicity</b> 92% White 3% Black 5% Other	<b>Location</b> Urban: 89% Suburban: 11%	<b>Children in Household (Mean)</b> 0.9 Children per household
<b>Marital Status</b> 74% Married 26% Not Married	<b>Education</b> High school or less: 15% Some college or college: 59% Graduate Degree: 26%	<b>Pets in Household* (Mean)</b> 1.9 Pets per household*
<b>Income</b> \$81,000 annual income		

Base: Total Pet Parents (n=16133)  
 \*Pets = Cats & Dogs

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### Most dogs are more likely to be adult males, small to medium, size given not bought

#### Dog Petographics

<b>Age</b> Younger than 1: 7% 1-6: 60% 7-10: 24% 11-18: 9% 19+: 1%	<b>Size</b> Toy: 10% Small: 28% Medium: 32% Large: 25% Extra Large: 6%	<b>Adoption/Purchase Channel</b> Shelter: 29% Private Breeder: 25% Friend/Family: 21% Pet Store: 16% Found: 3% Online: 1% Other: 6%
<b>Gender</b> Male: 56% Female: 44%	<b>Primary Home</b> Indoor: 63% Outdoor: 28% Both: 9%	

Base: Total Dogs (n=1981)  
 © 2016. Please provide information about your dog(s) below: Age, Gender, Adoption/Purchase Channel, Size, Primary Home

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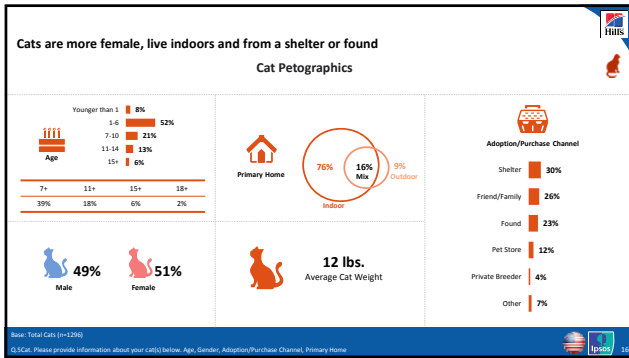
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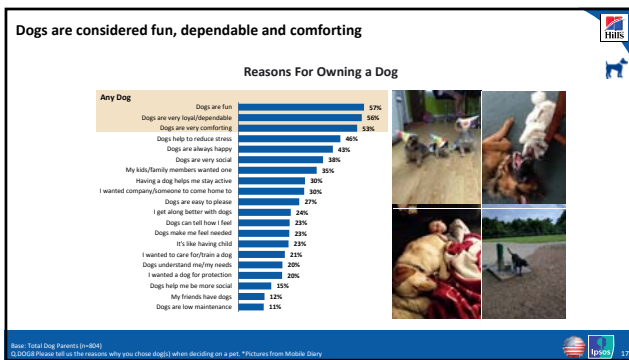
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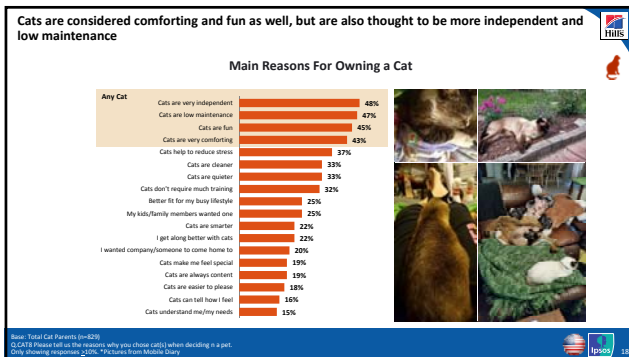
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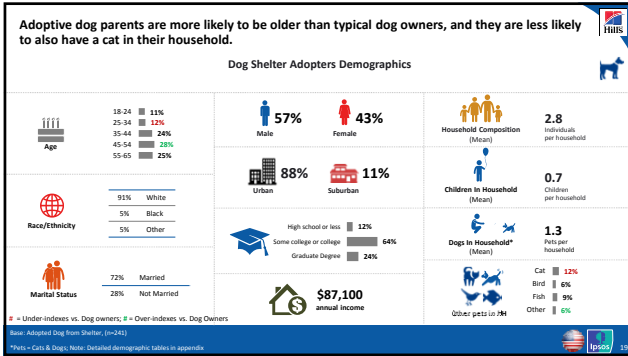
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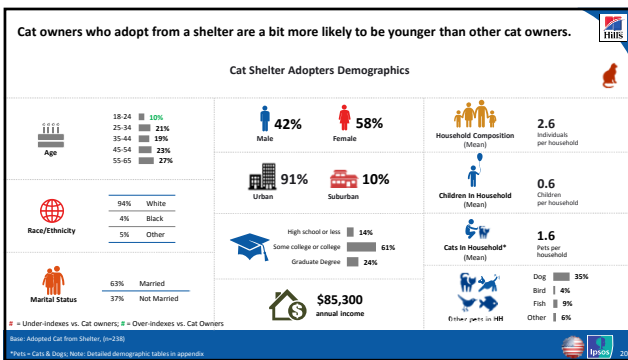
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**Thought Process**

People don't always recognize what they are feeling  
so how do we understand subconscious needs??



**Clinical psychologist  
Cat behaviorist**

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**What Are The Perceived Differences Between Having A Cat Versus A Dog?**

Cats were widely considered to be easier to care for than dogs and were perceived as having many functional advantages (usually centering around low maintenance and convenience), but also some emotional ones: cats were described as complex, selective, mysterious & spiritual



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Cat people describing themselves

Cat people describing Dog People

Cat people describing No Pet People

Narcissistic  
Sad Selfish  
Emotionally superficial  
Not responsible  
Clean freaks  
Lonely

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**What Is The Underlying Nature Of The Relationship Between Cat People And Their Cats?**

Reciprocal Relationship      A Mirror      My Responsibility

Sacrificing For One's Cat      Part Of Daily Routine

**5 Key components of the relationship between cat people and their cats**

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**Definition:** Mirroring is the behaviour in which one person subconsciously imitates the gesture, speech pattern, or attitude of another.

**A Mirror**

Many Cat Parents said that the most memorable (and revealing) time with their cats was a time when they feeling ill or unhappy (i.e. a vulnerable time), and their cat came to them to try to soothe them.

There was deep emotion around this event, and it was frequently compared to an equally emotional event that happened with one's parent or child.

But most importantly, it typically connected to the psychotherapeutic concept of mirroring – which in psychological terms is the feeling of being understood and validated.

*"I was at home crying on my bed, I think it was something work related, I was so unhappy. My cat came over to me, he could feel how I felt. He came over and purred and rubbed against me. I felt understood. Like therapy. My sadness went away. I felt supported. I started feeling more confident, more positive."*

*"There's a complicity with cats, they understand when you are ill or unhappy. My cat sits on me when I am in pain, to cheer me up, to make me feel better."*

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*"When I feed him, it makes me happy to see him happy. I like to see him happy and that makes me happy"*

*"We have a shared anxiety – If I'm in a bad mood, he gets in a bad mood. If I get stressed, he gets even worse. When I calm down, he calms down"*

*"We share affection. It's like when I hold hands with my girlfriend, a sense of belonging to one another"*

*"When I give my cat what he needs, I give myself what I need"*

*"In the morning, she's next to me and I tickle her and stroke her. It's a moment of Zen – calm and sharing. Time seems to stop. It's a bubble of calm and sharing. We are in harmony"*

**Reciprocal Relationship**

Most Cat Parents perceived a reciprocal relationship between themselves and their cats, almost to the point of being symbiotic.

This theme was often played out during the feeding situation.

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*"My cat disappeared while outside for a long time, and then he showed up on the steps - I felt happy and relieved. I compare this to when my teenagers went out until very late at night and then came back home. I could finally relax and sleep"*

*"A cat is not a toy, you have to look after him from when he's little until the very end. It's a commitment, you need to think about it"*



**My Responsibility**

As with any pet, Cat Parents are very aware of the responsibility of caring for their cat, who they realize is completely dependent on them, and this sometimes raises anxiety and worry.

The anxiety is considerably more acute for those who have outdoor cats.

*"You are responsible for a defenseless being that is dependent on you"*

*"It's my duty to take care of her, it's like taking care of a child"*

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*"I feel Fca when I returned from a trip, but I felt so guilty so I just needed to pet him. I took the time to do that rather than anyone. It's like a time I can remember when I was getting my daughter ready for day care - I played with her because she didn't want to go. I took the time, I was late for work"*

*"I feel like I'm being unfaithful to my cat if I pet another cat"*



**Sacrificing For One's Cat**

Cat Parents sometimes would do just about anything to make their cats happy, even if it inconveniences them.

*"I'll do anything for my cat. It's like visiting a child in an orphanage. They need me. I'm helpful. I'm there whenever the need is there"*

*"If I'm on the phone too long, he lets me know and I have to get off"*

*"You live in your cat's home, not the other way around. He decides what to do"*

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## So What?

**MORE RESULTS TO COME BUT SOME INITIAL THOUGHTS**

**CAT PEOPLE FEEL THEY ARE MORE SOPHISTICATED, INTELLIGENT PET PARENTS THAN DOG PEOPLE**  
 Run with it: acknowledge what smart choices they have made  
 Don't use the same communication for cat and dog people  
 Provide a differentiated look and feel to product, packaging and in-store  
 Highlight the more sensitive & feminine aspects of the relationship between cat people and their cats

**MOMENTS OF CONNECTION ARE SIGNIFICANT TO CAT PEOPLE**  
 Portraying these in communication will resonate more deeply than showing feeding moments

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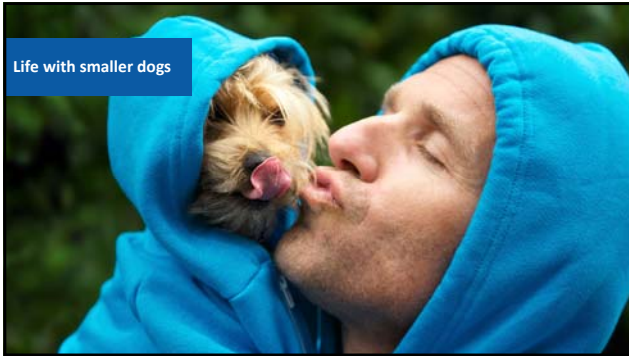
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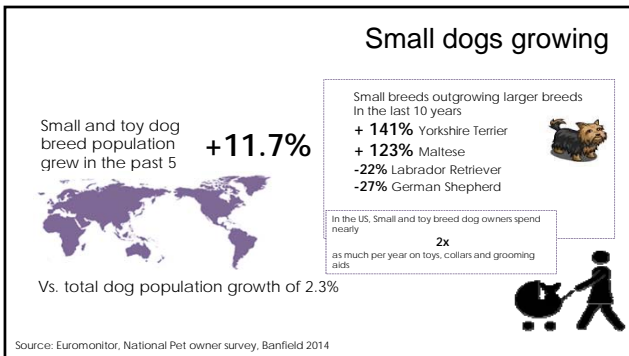
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### Insight

**Pet parents don't define their dog as just small or toy:**

- What matters is their BIG personality and the emotional connection they share
- Pet parents only talk about small when referring to the basic fact of their dog's small physically, not their character.
- They believe their dogs have larger-than-life personalities and confidence, which only serves to make their adorably small size seem ironic.
- A subset of pet parents feel that the name "toy" objectifies their dog

Source: Small dogs Pet parent understanding 2015

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### Insight



Source: Small dogs Pet parent understanding 2015

- They belong to communities, exchange health and nutrition information with other like-minded Pet Parents. Vets are not their primary source of information.
- Pet Parents believe their small dogs have fragile digestive systems that leave no room for error.
- Pet Parents quickly trust those who talk directly to their dogs and get down to their dogs' level.

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### Insight



Source: Small & Toy Impressions 2015

- Small dogs are a conduit to traditional values and simple moments in a modern world.
- Pet Parents play the role of protector more often than with other size dogs. However what others see as babying, Pet Parents see as instilling confidence in their small dogs.
- Having a small dog allows Pet Parents to take risks they never would have taken on their own.

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## Summary

- Low overall pet population growth but more small dogs
- Continuing trend of more dogs & cats than babies
- Millennials & Boomers are key demographics
  - Boomers spend more
- People expect the same for their pet as they do for themselves
- Pet parents tend to be more middle class than the rest of the population
- Cat people see themselves as more sophisticated
- Small dogs are not seen as small but big in personality

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