



Low-Income Communities and Pets – Access and Attitudes

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Goods and Services for pets is a business – a big one

44% of US homes have at least one dog

68% of US households (85 million families) have a pet in 2017

89.7 million dogs in US

94.2 million cats in US

\$72.1 B: est. to be spent on pets in 2018

\$18.3B on veterinary care, fastest growing segment



Source: American Pet Products Association's 2017-2018 National Pet Owners Survey.

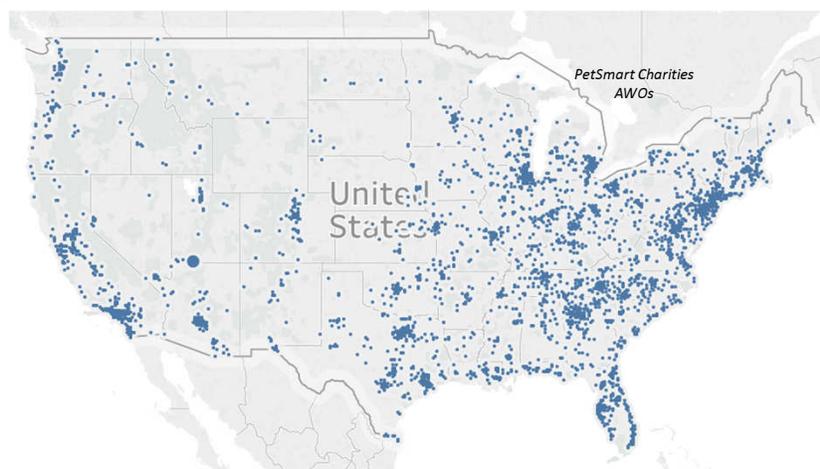


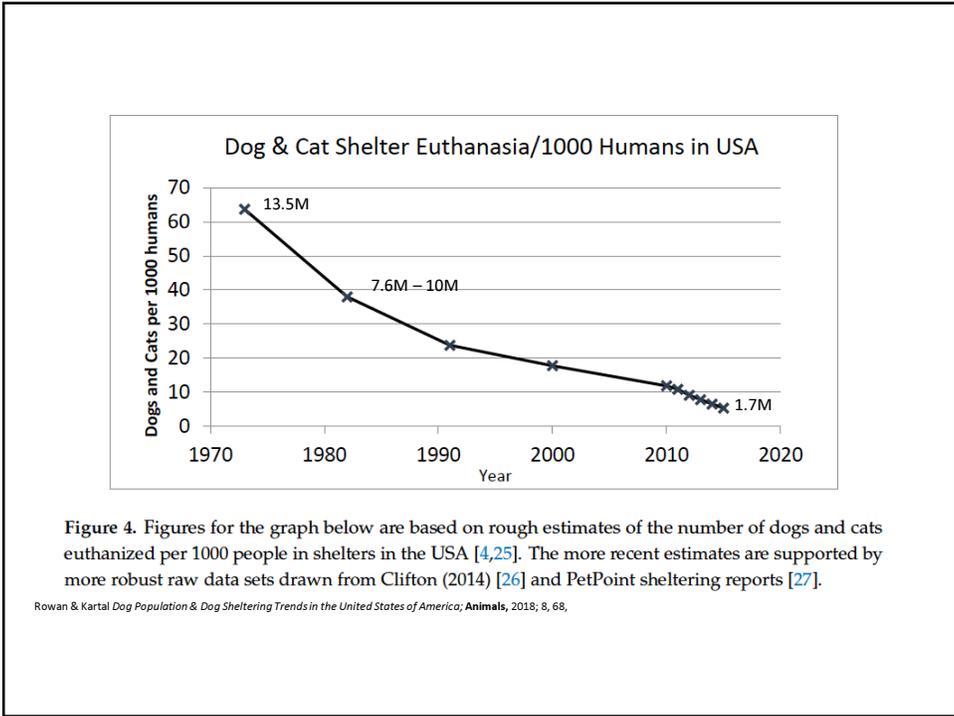
Starting Assumptions – assume general agreement?

- ✓ There are very real health benefits (individual, community and societal health) to pet ownership, regardless of income level
- ✓ Responsible pet ownership is something we should encourage
- ✓ A basic level of veterinary care is a part of responsible pet ownership
- ✓ Veterinary care costs money, and that money can only come from owners, philanthropy or government sources
- ✓ The vast majority of pet owners want to be responsible



Animal Welfare Organizations supported by PetSmart Charities

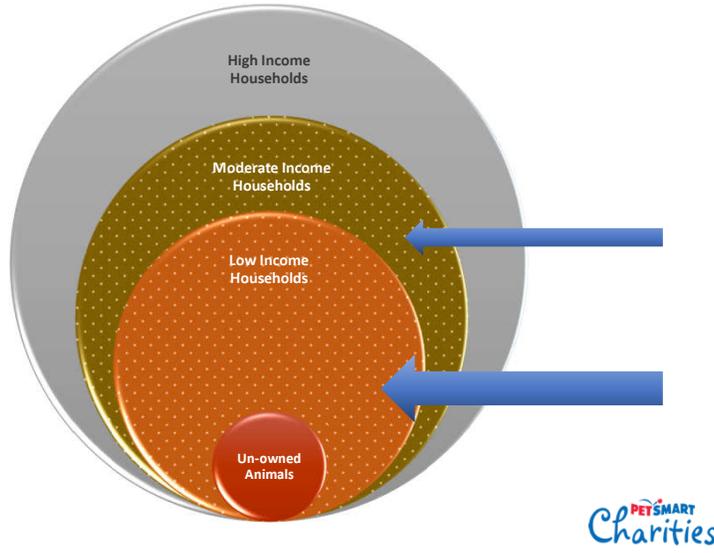




“...it’s in the nature of progress that it erases its tracks, and its champions fixate on the remaining injustices and forget how far we have come...”

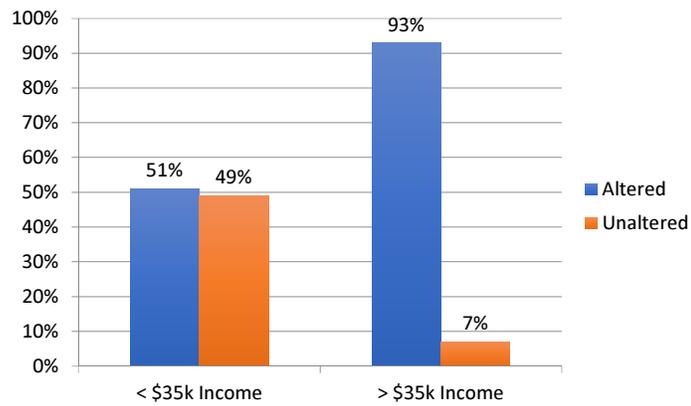
Steven Pinker
Enlightenment Now, 2018

So what about those animals outside the shelters, but not seeing veterinarians?



Strong Socio-Economic Variability

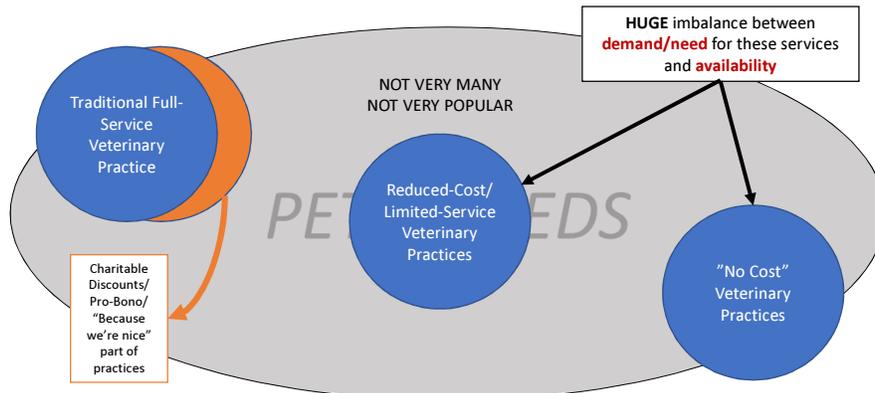
Spay/Neuter Rates



Focusing on the Veterinary Service Deserts

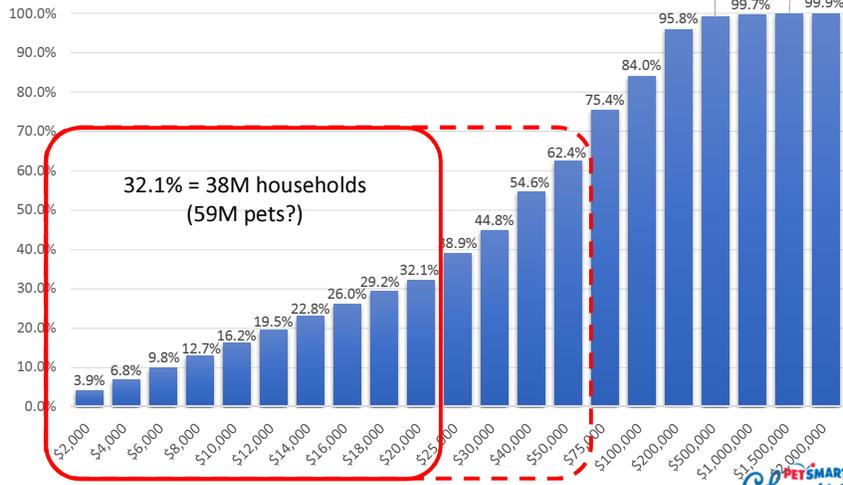


We're leaving a lot of pets behind



By a lot of pets, we mean...

Percentage of households earning less than \$X



Sources: IRS Statistics of Income, 2014; US Census Bureau



Ability to Spend on Veterinary Care

	I consider my dog(s) to be a:			
	Total	Family member	Pet/companion	Property
Household income	\$	\$	\$	\$
Less than \$20,000	216	252	137	158
\$20,000 to \$34,999	272	309	196	198
\$35,000 to \$54,999	318	380	210	129
\$55,000 to \$84,999	391	447	290	122
\$85,000 or more	568	664	391	249

\$216/pet X 59M pets = \$12.7B unrealized veterinary revenue





Summary

- ✓ The demand for companion animal veterinary services spreads across all income groups and communities, but we've traditionally focused on the highest income/ability to pay segments
- ✓ There are large segments of pets not being serviced by anyone - for-profit or non-profit alike - and this represents a huge economic opportunity
- ✓ The limiting factor for serving this segment is access to licensed veterinarians – not willingness or ability of pet owners
- ✓ Creating a wide variety of veterinary service provider business models will generate greater economic value for everybody
- ✓ Remembering why we got into this field will benefit everyone -vets, paraprofessionals, owners and (most importantly) pets