

Bachelor's thesis

Bachelor of Business Administration

2020

PIRES Aurélie

Pet industry expenditure. Case study of Metropolitan France:  
struggling pet owners and a promising market with constant  
innovations.

BACHELOR'S THESIS | ABSTRACT

TURKU UNIVERSITY OF APPLIED SCIENCES

Bachelor of Business Administration

Third year |

## PIRES Aurélie

### Pet industry expenditure. Case study of Metropolitan France: struggling pet owners and a promising market with constant innovations.

This thesis is based on the researcher's interest. The motivation of the writer comes from a personal story with pet sitting and a deep interest for the pet industry.

One out of two French households have a pet. This makes France the 9<sup>th</sup> country with the most dogs in the world. However, France is also the country with the most drop-outs in Europe.

The intent of this thesis is to understand what the requirements are to find a pet sitter considering the lack of facilities in French cities and how does start-ups interact in this process with answering the following questions:

Identify key requirements to find a pet sitter; to what extent does French cities suffer from a lack of dog facilities and does the criteria of choosing a pet sitter match with the new pet sitting solutions offered by startups?

The target group is the millennial and Generation Z consumers. The research methods chosen for the thesis are both qualitative and quantitative methods (mixed method). A case study approach is chosen for this thesis and the results of the research are valid only to the limited area, therefore, the conclusions should not be generalized to other places.

The conclusion establishes that the main requirement to find a pet sitter is the familiarity with the person. The aim is to provide a familiar and safe environment for the pet to avoid stress and sadness. In order to do so, people are ready to spend more but they need to hear advocacy from someone they know or online (word of mouth). However, France seems to be far behind other countries regarding dog facilities. Even if the number of grooming and veterinary is enough, parks and doggy-parks such as in Germany, Finland or USA are lacking. Investing in dog facilities could contribute to city branding and attract new comers.

Dog owners do not welcome robotic pet sitting solutions. Platforms that create link between owners and pet sitters are more requested as it generates human contact. French cities did not adapt to the evolution in the relation of dogs and their owners. It would be interesting to conduct the same study over different period of time to measure this evolution and identify it in different cities.

#### KEYWORDS:

Dog-sitting, Pet-sitting, Ile-de-France, Millennial, Pet-owners, Doggy park, Brand management

## LIST OF ABBREVIATIONS (OR) SYMBOLS

FACCO        Fédération des fabricants d'aliments pour chien (federation of dog food manufacturer)

INSEE        Institut national de la statistique et des études économiques (The national institute of statistics and economic studies)

NAC            "Nouveaux animaux de compagnie" can be translated by New Kind of Pets.

## Contents

LIST OF ABBREVIATIONS (OR) SYMBOLS .....	3
FIGURES .....	5
1 INTRODUCTION .....	6
1.1 MOTIVATION AND BACKGROUND INFORMATION .....	7
1.2 RESEARCH QUESTIONS AND OBJECTIVES .....	8
1.3 THESIS IS STRUCTURED IN FOLLOWING ORDER: .....	9
2 LITERATURE REVIEW .....	10
2.1 STAGES IN CONSUMER DECISION MAKING .....	10
2.1.1 PROBLEM RECOGNITION .....	11
2.1.2 INFORMATION SEARCH .....	11
2.2 EVALUATION OF ALTERNATIVES .....	12
2.2.1 PRODUCT CHOICE .....	13
2.2.2 OUTCOMES .....	13
2.3 THE CONSUMER DECISION JOURNEY .....	14
2.3.1 THE TRADITIONAL FUNNEL .....	<b>ERREUR ! SIGNET NON DEFINI.</b>
2.3.2 THE CIRCULAR CONSUMER DECISION JOURNEY .....	14
2.3.3 INITIAL CONSIDERATION SET .....	15
2.3.4 ACTIVE EVALUATION .....	16
2.3.5 MOMENT OF PURCHASE .....	17
2.3.6 POST-PURCHASE EXPERIENCE .....	17
2.3.7 CUSTOMER ADVOCACY .....	18
2.4 OVERVIEW OF THE PET POPULATION IN FRANCE .....	19
2.4.1 INTEREST ON DOG-SITTING PER REGION .....	21
3 RESEARCH METHODOLOGY .....	22
3.1 RESEARCH OBJECTIVES .....	22
3.2 RESEARCH DESIGN .....	22
3.3 RESEARCH PLANNING .....	23
3.3.1 QUALITATIVE DATA COLLECTION .....	24
3.3.2 QUANTITATIVE METHOD .....	25
3.4 METHODS RELIABILITY AND LIMITATIONS .....	25
4 RESEARCH ANALYSIS .....	27
4.1 FOCUS GROUP ANALYSIS .....	27
4.2 INTERVIEW ANALYSIS .....	28
4.3 SURVEY ANALYSIS .....	30
4.3.1 THE DOG AND OWNER RELATION .....	31
4.3.2 REQUIREMENTS AND CRITERIA IN THE PROCESS OF LOOKING FOR A SITTER .....	32
4.3.3 LACK OF FACILITIES IN FRENCH CITIES .....	32
4.3.4 START-UPS AND DOG-SITTING .....	33
HOLIDOG : A REVISITED PENSION .....	33
FURBO: A ROBOTIC APPROACH .....	34
4.3.5 RESULTS OF THE SURVEY .....	34
5 CONCLUSION AND IMPLICATIONS .....	36
5.1 RESEARCH FINDINGS .....	36
5.2 SUGGESTIONS FOR FURTHER RESEARCH .....	37
6 SOURCES .....	38
7 APPENDICES .....	42

# FIGURES

FIGURE 1. STAGES IN CONSUMER DECISION MAKING (CONSUMER BEHAVIOR AND MARKETING STRATEGY, 1999, 25) .....	10
FIGURE 2. THE TRADITIONAL SALES FUNNEL (ZIMMERMANN, F. 2019 SOCIALMEDIAGIDS.COM) .....	14
FIGURE 3. THE CONSUMER DECISION JOURNEY (COURT ET. AL., 2009).....	15
FIGURE 4. NUMBER OF BRANDS ADDED FOR CONSIDERATION IN DIFFERENT STAGES BY INDUSTRY (COURT ET. AL., 2009).....	16
FIGURE 5. TOUCH POINTS DURING THE ACTIVE-EVALUATION PHASE (MCKINSEY QUARTERLY, 2009). ....	17
FIGURE 6. NUMBER OF PET IN MILLION IN FRANCE (FACCO, 2016).....	20
FIGURE 7. RESPONDENTS AGE (FROM THE SURVEY, PRIMARY DATA) .....	30
FIGURE 8. MONTHLY EXPENSES ON PETS (FROM THE SURVEY, PRIMARY DATA) .....	31
FIGURE 9. FURBO CAMERA CHARACTERISTICS .....	34

# 1 INTRODUCTION

Nowadays, one out of two French households have a pet. Almost 63 million domestic animals live in France where France has 66,99 million inhabitants in 2018 (FACCO, 2019). Considering there were 7,3 million dogs in France in 2017, this makes France the 9<sup>th</sup> country with the most dogs in the world (World Atlas, 2017). 42% of French households have at least one dog or one cat (FACCO, 2019).

Besides, 60% out of the surveyed French people claim to love their dogs like human family members (FACCO, 2016). As a matter of fact, this is reflected in the range of services offered which has grown and gone upmarket. Health, well-being, naturalness and practicality are the keywords. Therefore, dog grooming (approx. 6 000) and vets (approx. 18 150) are easy to find in almost every town. The pet market is estimated between 4 and 5 billion euros in France, of which almost half is for dogs. Even though there is no licensing system for dogs, every dog born after the 6th of January 1999, is required to adorn a tattoo or a microchip under the skin that mentions its official identifying number. (LSA, 2019)

However, French are not only famous for being dog lovers: with 100 000 abandoned pets each year (including 60 000 during the summer), France holds the record number of dropouts in Europe. "It's the record of shame, it's an electroshock, it's been 30 years that we've been saying the same things every summer, you have to raise your clenched fist and say that's enough". (Hutin, *30 million d'amis*, 2019) This ambivalence is even more incomprehensible since more and more pet sitting solutions are generated every year.

The millennial and Generation Z consumers have come into adulthood and has embraced the pet-owning and pet-loving lifestyles to a far greater extent than their elders (Gen Z and Millennials as Pet Market Consumers: Dogs, Cats, Other Pets, 2017). Nearly 6 out of 10 French people say they are ready to vote for a candidate engaged in animal protection for the upcoming municipal election in March. This high score is even clearer among 18-24-year-old since it reaches 78% (Gaillard, 2020).

The status of pets is changing for several reasons. Young people are delaying getting married and having children. Millennials lavish their creatures with the time and emotional energy that they might one day show a child. Some companies, including google, even try to attract talent with allowing dogs in office. Others, like Genentech, offer

subsidized doggie daycare (Bass, 2017). Moreover, pet stores have shown revenue growth even during recessions, as 40% of owners prefers to cut back on their own expenses before dropping the standard of living for their pets (LCI).

Looking at the different segment (pet-sitting, food, treats, insurances, toys, accessories, monthly boxes, technologies, even Christmas calendar...) people tend to humanize their pets, as they become part of the family. To avoid drop outs start-ups as well as private individual try to innovate and rethink the pet-sitting industry. It can be with service robotics such as Furbo camera or with smart and optimized phone App, websites (e.g: DogVacances, Holydog...). Consequently, the researcher realized that there is a need to conduct a deeper analysis of the owners buying behavior.

### 1.1 Motivation and background information

This thesis is categorized as a research thesis because the topic chosen is based on the researcher's interest and not commissioned or for professional gain. Finding the topic was not really complicated as I am in one hand particularly absorbed by entrepreneurship and on the other hand I adore pets and am fascinated by this industry.

In 2009 my mom showed me her old but perfectly kept dog-sitting record book. It was a small journal, containing several information about her residents (names, food preferences, habits, behavior...). This is when I started to do pet sitting as well.

The first dog I had to sit was a golden retriever called Dakota. It was hard for her owners to leave her behind while they went on vacation. She stayed with us 3 weeks in July 2010. During the first days, she was extremely sad, so it was hard to make her eat her kibbles. She also got used to sit in front of the gate waiting for her owners to come back. With time and effort, she began to feel better and started to eat normally. She was even wriggling her tail again. When her owners finally came back to pick her up, she was full of joy. My first customers entrusted me Dakota again for Christmas. This routine lasted 9 years.

During this time, I ended up having plenty of customers since the word of mouth spread well. On average, I managed between 6 and 10 different custody per year. So, I stopped accepting new dogs as it was the maximum amount to keep ensuring the good quality of the provided service.

As an experienced pet-sitter, I own a 2-year-old female golden retriever (that I chose because of Dakota), a cat and a rabbit. When I had to find a trustworthy sitter, it turned out to be challenging. Nobody wants to leave their pets to strangers. There is a real need in this field as it is a challenge to find someone you trust for this task.

All the owners I met doing my pet-sitter job had already tried several ways and sitters before finding me. They had many bad experiences and were kind of disheartened. I also realized this industry was probably thriving since a huge part of these people payed expensive hotels for their four-legged friends.

Nevertheless, my concern for this topic is not without personal motivation. Indeed, as an animal lover and pet owner, my professional project is linked to the pet industry and this thesis would be a great opportunity to solidify and deepen my knowledge about it.

## 1.2 Research Questions and objectives

On one hand, this study will highlight the niche market that is the dog sitting. The emphasis will be on the innovative start-ups and on the new solutions available in France. To do so, start-ups offering new pet sitting solutions are going to be studied. The company Furbo will be studied for the robotic part of the solution when Holidog has been chosen for the human one.

On the other hand, the final purpose of this project is to make an impact on some French municipality with making suggestions to enhance the dog facilities. In order to collect and lay out arguments, the topic will be explored with the case study of the area around the city of Meaux but more generally Metropolitan France and the area of Ile-de-France. The aim of the case study is to have an overview of the situation in this area. It will give a synopsis of the challenges French dog owners face when having a dog and highlight the range of possible improvements.

To be specific with the research objectives, it is to explore and answer the following research questions:

- What are the requirements to find a pet sitter?
- To what extent does French cities suffer from a lack of dog facilities?

➤ Does the criteria of choosing a pet sitter match with the new pet sitting solutions offered by start-ups?

1.3 Thesis is structured in following order:

The thesis begins with the introduction to the French pet sitting market. Various relevant numbers from different sources are given to give an overview of the situation of pets in the country. The motivation behind this work is explained as well as the background information. The chapter ends with the objectives and research questions of the thesis.

Then, the literature review section examines marketing and branding theories that can be linked to the pet owner buying behavior. It will help the reader understand the path when choosing a pet sitter as well as the requirements.

The next chapter is methodology. The ways the researches are done for the thesis are explained including all the methods used for data collection and the different contact person. Each method of data collection is defined in detail with their limitations.

Research analysis section of the study, the interviews and questionnaire that constitutes the primary data is discussed in detail and confirm the data of the literature review. The importance of the lack of facilities is highlighted. A discussion is made on the possible solutions to pet sitting issues.

Based on the analysis and researches done throughout this thesis, conclusion is presented, and various suggestions are provided for further researches.

## 2 LITERATURE REVIEW

In this section, the researcher will examine marketing and branding theories linked to the pet owner buying behaviour.

### 2.1 Stages in consumer decision making

The Consumer Decision Processes made by Dewey in 1910 (Gordon and Richard, 1988) also known as Buyer Decision Processes refer to the decision-making stages that a consumer undergoes before, during, and after they purchase a product or service. Like any other product or services, finding a dog sitter follows the stages in consumer decision-making. This model was revised by Engel, Blackwell and Kollat in 1968 (Gordon and Richard 1988). That whole process is still the most persuasive marketing model around.

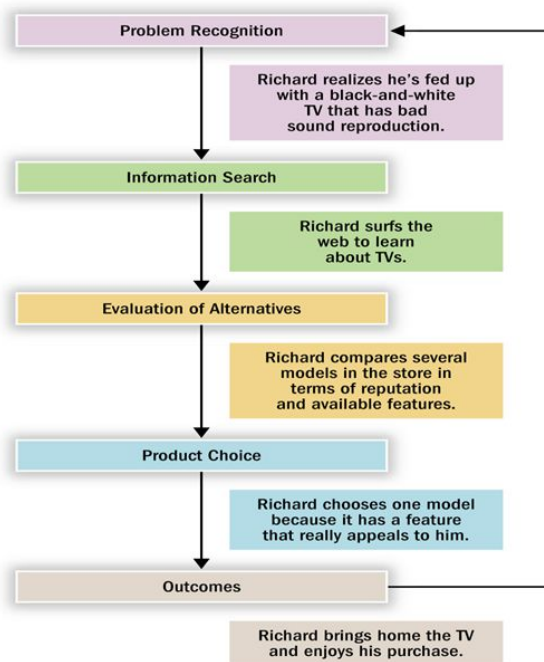


Figure 9.1

### 2.1.1 Problem recognition

Problem recognition occurs when an individual's actual state differs from their desired state (Peter and Olson, 2006, 25). The desire to resolve a recognized problem depends on the size of the difference between the desired and actual state and the relative importance of the problem. Consumer analyses can be used for understanding markets and developing effective marketing strategies. This is the first stage of the model, the consumer will be able to recognize his problem or need and subsequently, what product or kind of product would be able to meet this need. It is oftentimes recognized as the first and most crucial step in the process. Indeed, if consumers do not perceive a problem or need, they will not move forward with considering a product purchase.

A need can be triggered by internal or external stimuli. Internal stimuli refer to a personal perception experienced by the consumer. In the dog sitting industry, pet owners need is usually triggered by an internal stimuli. For example, the dog owner realize that he is not going to be able to take care of his pet, thus he recognizes a need. Contrarily, External stimuli include outside influences such as advertising or word-of-mouth.

There are three levels of purchase involvement (Mittal, 1989) which all have differing influences on the way in which consumers go through the consumer decision-making process:

- low purchase involvement → habitual decision making
- medium purchase involvement → limited decision making
- high purchase involvement → extended decision making

Therefore, the pet owner realizes his need of a sitter when he is not able to take care of his animal for a period of time or to walk it.

### 2.1.2 Information search

Information Search is a stage in the Consumer Decision Process during which a consumer searches for internal or external information. Once the problem has been clarified it is time to look out the different solutions. During the information search, the options available to the consumer are identified or further clarified. (Peter and Olson, 2006, 26)

An internal search refers to a consumer's memory or recollection of a product, oftentimes triggered or guided by personal experience.

An external search is conducted when a person who has no prior knowledge about a product seeks information from personal sources (e.g. word of mouth from friends/family) and/or public sources (e.g. online forums, consumer reports) or marketer dominated sources (e.g. sales persons, advertising). During this time, the options available to the consumer are identified or further clarified.

There are two kinds of sources:

- Marketing sources: sales personnel, advertising and websites
- Experiential sources: inspection, word of mouth and product trial

## 2.2 Evaluation of alternatives

Then, during the evaluation of alternatives stage, the consumer evaluates all the products available on a scale of particular attributes. It means, consumers evaluate all of their products or brand options on a scale of attributes which have the ability to deliver the benefit that they are seeking. (Manninen, 2020)

In order for a marketing organization to increase the likelihood that their brand is part of the evoked set for many consumers, they need to understand what benefits consumers are seeking and specifically, which attributes will be most influential to their decision-making process. What are the criteria used by the pet owner in order to choose their sitter?

It is important to note that consumers evaluate alternatives in terms of the functional and psychological benefits that they offer. (Boundless Marketing course)

Ultimately, consumers must be able to effectively assess the value of all the products or brands in their evoked set before they can move on to the next step of the decision process.

**Evoked Set:** The number of alternatives that are considered by consumers during the problem-solving process.

When looking for a pet sitter, the buyer answers a need, not a wish.

There are two types of needs. People are born with a need for certain elements necessary to maintain life (food, water, air...). These needs are *biogenic needs*. On the other hand, people have many other needs that are not innate. These are *psychogenic*

*needs* and come as we become members of a specific culture such as status, power and so on (Solomon et. Al., 2006, 315). Finding a good pet sitter is a biogenic need for the pet owners as it is a matter of life for the animal. Then, the owner can decide whether he wants to ad psychogenic needs and choose a higher service.

### 2.2.1 Product choice

During the product choice or purchase decision stage, the consumer may form an intention to buy the most preferred brand or product. During this time, the consumer may form an intention to buy the most preferred brand because he has evaluated all the alternatives and identified the value that it will bring him. The final purchase decision can be disrupted by two factors: 1. Negative feedback of others and our level of motivation to comply or accept the feedback. 2. The decision may be disrupted due to a situation that one did not anticipate, such as losing a job or a retail store closing down. During this stage, the consumer must decide the following: 1. from whom he should buy, 2. when to buy, and 3. whether to buy. (Boundless Marketing, lumen learning)

When looking at a sitter the owners have two main options: private individual or professional (Harwood and Tukonic, 2016, 590). In this exact situation, parents and owners might have a common denominator. They both look for a trustworthy solution.

### 2.2.2 Outcomes

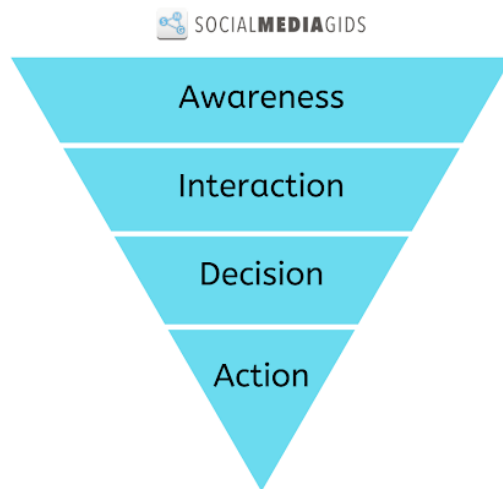
The outcomes phase or post-purchase behavior is when the customer assesses whether he is satisfied or dissatisfied with a purchase. The owner has entrusted his dog to the sitter. How the customer feels about a purchase will significantly influence whether he will purchase the product again or consider other products within the brand repertoire.

Cognitive dissonance is when the customer experiences feelings of post-purchase psychological tension or anxiety. Some companies like to engage their consumers with post-purchase communications in an effort to influence their feelings about their purchase and future purchases. (Harwood and Tukonic, 2016, 590)

## 2.3 The consumer decision journey

The Consumer Decision Journey (CDJ) is a model that describes how consumers make purchase decisions.

“If marketing has one goal, it’s to reach consumers at the moments that most influence their decisions” (Court et. al., 2009, 2). But how do companies define those moments? For years, marketing used to see the buying process as the following “funnel”:



*Figure 2. The traditional sales funnel (Zimmermann, F. 2019 socialmediagids.com)*

Customers have a large amount of leads, these are the brands he has in mind. In our case it would be the different options the owner has for his pet to be looked after. That’s why dog sitting companies such as Holidog or DogVacances has to make sure that customers will hear about them before or during the awareness phase. Marketing is then directed at them as they methodically reduce that number and move through the funnel (Court et. Al., 2009). The final aim for any brand would be to go through the funnel until the end to reach the loyalty step.

### 2.3.1 The circular consumer decision journey

However, nowadays, the simplicity and straightness of the funnel fails to capture the key buying factors resulting from the diversity of product choices and channels, especially the digital ones. The explosion of new media such as search, display, mobile, TV, and

social media interact to affect consumer decision making. Consumers are dramatically shifting both their media usage patterns and how they utilize different media sources to get the information they seek, which thus influences when, where, and how they choose brands. The consumer “path to purchase” is also fundamentally different today—often shorter in length, less hierarchical, and more complex (Court et. Al., 2009). Consumers do not necessarily passively receive brand information strictly through legacy mass media such as print or TV and store it in memory for later use. Rather, they now actively seek it when needed, through search engines, mobile browsers, blogs, and brand websites. Because of increased social influences on purchase, word of mouth and advocacy, consumers are getting more and more informed while marketers are losing control. (Batra and Keller, 2016)

Thus, a more adapted and less linear approach is required, we call this the consumer decision journey. This thinking is applicable to any geographic market that has different kinds of media (Court et. Al., 2009,3).

The decision-making process is a circular journey, with four meaningful phases: initial consideration; active evaluation, or the process of researching potential purchases;

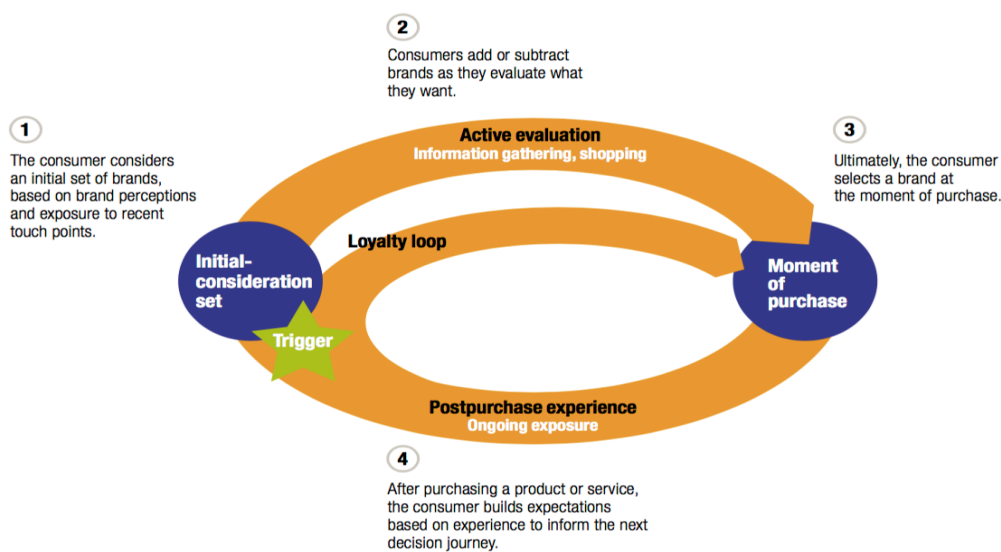


Figure 3. The consumer decision journey (Court et. Al., 2009)

### 2.3.2 Initial consideration set

When a customer wants to buy a product, he may be able to name on top of mind which is the initial consideration set. Brand awareness matters since brand in the initial

consideration set can be up to three times more likely to be purchased than brand that aren't in it (Court et. Al., 2009). Contrary to the traditional funnel, it is not because they are not in the initial consideration set that all brands are excluded from the consumer decision journey. Brands in the initial consideration set are not fixed. New brands can enter and force the exit of rivals.

The number of brands added in later stages depend on the industry.

Sector	Share of purchases, %			Average number of brands	
	Initial consideration	Active evaluation	Loyalty loop <sup>1</sup>	In initial-consideration set	Added in active consideration
Autos	63	30	7	3.8	2.2
Personal computers	49	24	27	1.7	1.0
Skin care	38	37	25	1.5	1.8
Telecom carriers	38	20	42	1.5	0.9
Auto insurance	13	9	78	3.2	1.4

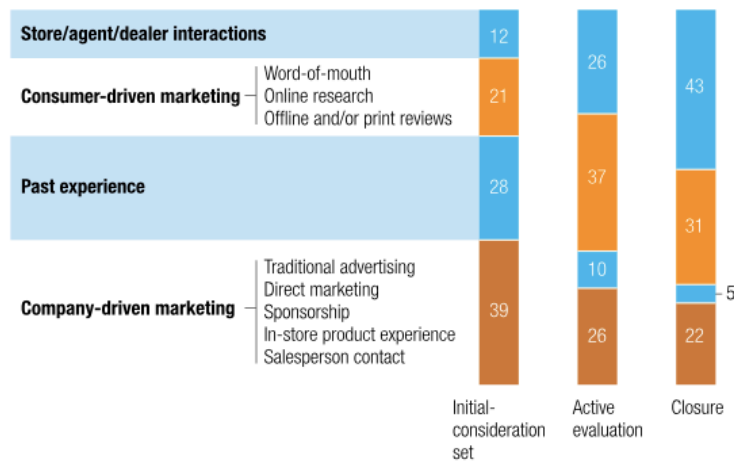
Figure 4. Number of brands added for consideration in different stages by industry (Court et. Al., 2009)

In the pet sitting industry, the initial possibilities that are considered are the close relatives. As in the baby-sitting industry, people need someone they trust to take care of their beloved one since they are cautious with strangers. Owners are not really aware of what options they have. That is why, pet sitting companies need to be known at least from veterinary. Dog owners are often going to ask their veterinary first when they have questions. They are usually trusted by them. Thus, this is in the active evaluation that dog owners are going to hear about different pet sitting solutions.

### 2.3.3 Active evaluation

This is where the customer evaluates their range of possibilities and the pros & cons of each options. Two thirds of the touch points during the active-evaluation phase involve customer researching the best options by themselves with looking through internet reviews, word-of-mouth, in-store interactions and recollections of past experiences. Only one third of the touch points in linked to company-driven marketing. (McKinsey Quarterly, 2009).

Most-influential touch points by stage of consumer decision journey, for competitors and new customers, % of effectiveness<sup>1</sup>



<sup>1</sup>Based on research conducted on German, Japanese, and US consumers in following sectors: for initial consideration—autos, auto insurance, telecom handsets and carriers; for active evaluation—auto insurance, telecom handsets; for closure—autos, auto insurance, skin care, and TVs; figures may not sum to 100%, because of rounding.

Figure 5. Touch points during the active-evaluation phase (McKinsey Quarterly, 2009).

### 2.3.4 Moment of purchase

At this stage, the customer will select the brand he is wanting to purchase from. When the decision has been done, the marketer's work has just begun, his aim is to make the shopping or product experience unforgettable in order to create a long-term relationship. When the pet owner entrusts his pet to the sitter he chose, the most important part of the work is still to come. The post purchase experience will shape the opinion of the pet owner who is actually going to influence his surroundings and his own future purchase decision. Thus, the journey is an ongoing cycle.

### 2.3.5 Post-purchase experience

The post purchase decision is the moment where the consumer evaluates whether the product or service reach his expectations. For example, more than 60 percent of consumers of facial skin care products go online to conduct further research after the purchase (McKinsey Quarterly, 2009). In today's increasingly competitive world marketer's try to get consumers to committed to the brand through consumer satisfaction and loyalty. By acknowledging and reaching the customers' expectations, the company is going to maintain a competitive advantage and receive customer loyalty and profit in return.

The customer satisfaction is based on the customer's experience of both contact with the organization and personal outcomes which depends on how is managed the brand.

Brand management is the process of maintaining, improving and upholding a brand so that the name is associated with positive results. It involves a number of important aspects such as cost, customer satisfaction, presentation and competition.

Thus, a well-managed branding should be able to trigger an emotional connection (Gordon, 2011, 242) as in the dog sitting industry the post purchase experience is of great significance. Owners will form their impressions of the brand and share it not only with word-of-mouth but publicly with reviews on internet. This will influence the purchase decision of other prospects when they are in the Initial consideration set.

Brand is also a promise (Pink, 2011, 228). That is why the owner needs to be satisfied which means that the product performs relative to expectations. If the expectations are bigger than the benefits, the customer is likely to be dissatisfied. For example, if the dog owner sees a lack of attention to his pet or any bad treatment, the promise is broken.

Since the consumer decision journey is a circular movement, neglecting your branding will not only conduct to the loss of this customer but also to possible prospects. Contrarily, achieving loyalty will assure the marketer a regular consumer. As a consequence, there is a growing interest in customer satisfaction as a means of evaluating the quality of the experience. High customer satisfaction ratings are often considered as the best indicator of the company's future profit. Satisfaction can be characterized as a post-purchase evaluation of product quality given pre-purchase expectation. (Cengiz ,2010, 78).

### 2.3.6 Customer advocacy

Indeed, what both traditional funnel and circular economy journey forgot to mention is the advocacy. This stage is a result of the loyalty loop and of a good post-purchase experience.

To achieve this phase, the marketer should focus on his relationship with the customer by inspiring and surprising him (Flick, 2015). This will encourage him to spread the admiration he has for the brand around him. This is considered as the best way to advertise (Merikallio, 2019), especially in the dog sitting industry since it depends on the trust pet owners have in their sitter (see Interview results).

## 2.4 Overview of the pet population in France

“Culture can be regarded as a collective phenomenon, since it is shared at least partly by people who live in the same environment” (Hofstede, 1991). Some characteristics of the French culture are attached to the collectivism of the French: other people are always taken into consideration. Furthermore, the French tend to be strongly attached to their families (Trompenaars and Hampden-Turner, 1997). Considering the attachment of French people to their families and that 60% out of the surveyed French people claim to love their dogs like human family members (FACCO, 2016), it is clear that pet sitting in France is an issue. Moreover, not only is pet sitting an issue in France but a major one as the population of dogs involve approximately 7.3 million (INSEE, 2016).

The National Institute of Statistics and Economic Studies (French: *Institut national de la statistique et des études économiques*), abbreviated INSEE, is the national statistics bureau of France.

According to Herpin (1991) spending on pets is increasing since 1970. An individual spends on average more on their pets than on their public transportation. However, since 2000, the canine population did not stop decreasing until 2014. While France had 9 million dogs in 2000, they were only 7.3 million in 2014. Even if French still considered dog as “the man’s best friend”, it has been dethroned by the cat, considered less restrictive in terms of sitting.

FACCO stands for « Fédération des fabricants d’Aliments pour Chiens, Chats, Oiseaux et autres animaux familiers » which means federation of manufacturers of food for dogs, cats, birds and other pets. They realize market study through a strong collaboration with Kantar (founded in 1992).

49.5% of French households today have a pet, i.e. nearly one in two households. (42% have at least a dog or a cat FACCO 2018) As pointed out by Nelly Papapanayotou, Director at KANTAR TNS, “in a context of crisis, pets are more and more requested as it allows to forget the small daily problems and to counter loneliness. ” This is even more true for cats and dogs assimilated to a family member for 59.7% of dog owners and 49.5% of cat owners. Before the 20<sup>th</sup> century, dogs were mainly chosen as a defense system for the house (the German Shepherd was then the most represented breed). Today, owners are looking for a friend or a family member to fight against loneliness or participate in sports or fun activities. People firstly chose to adopt a dog because they

love them, then because they are looking for companionship and in third place for the development of their children (FACCO, 2018).

For more than twenty years, the FACCO - KANTAR TNS collected information on the population and the possession of pets in France. Its finding is that despite an increasing number of cats, the population of dog in France is decreasing. There were 8.5 million of dogs in 2005 compare to 7.3 million in 2016

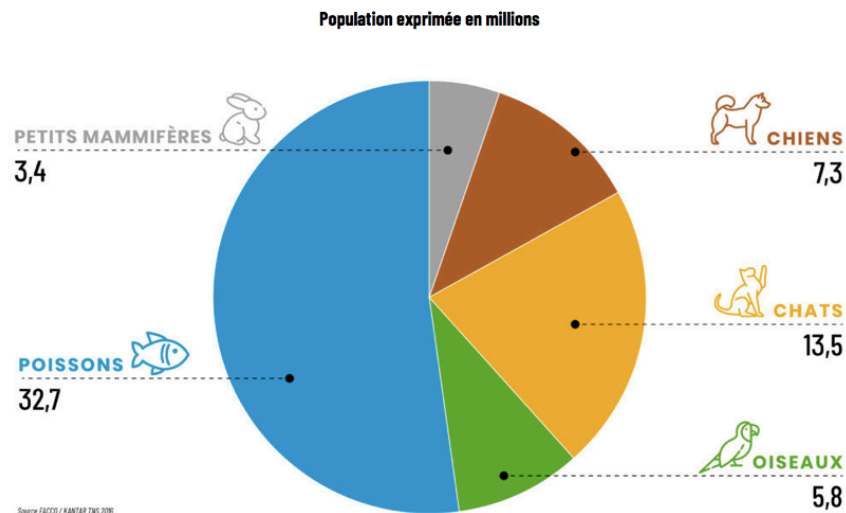


Figure 6. Number of pet in million in France (FACCO, 2016)

FACCO is interested in the cause of non-possession of a dog: only 6.1% of households claim that they don't want a dog because they do not like this species. The reasons most often related to weekends and holidays, long-term commitment and the lack of conditions required to accommodate a dog (e.g garden). The cost of a dog (purchase, maintenance) is cited only in 2.9% of cases as the most important reason for not owning a dog. The constraints linked in particular to maintaining a dog, particularly in an urban environment, would therefore be at the origin of the decrease in possession in French households. Thus, creating new pet sitting solutions could facilitate the adoption of dogs from people that are only stopped by week-end and holydays. In addition, setting up facilities in cities could motivate the people who doesn't have gardens that are big enough (e.g doggie parks). As a matter of fact, only 11,5% of the dog owners doesn't live in a house. (FACCO KANTAR TNS 2016).

#### 2.4.1 Interest on dog-sitting per region

Google Trends is a tool from Google Labs allow to know the frequency with which a term was typed in the Google search engine, with the possibility of viewing this data by region and by language. When checking the frequency of research of the term dog-sitting during the past 30 days, France is the 13<sup>th</sup> country that googled it the most.

However, within France, when we put the French expression that is “garde de chien”, Ile-de-France is the last region out of 21 to have looked for this on internet. Surprisingly, when we put the same expression with cat instead of dog which is “garde de chat”, Ile-de-France is 13<sup>th</sup> out of 21 regions. There is a correlation between the lack of facilities for dogs in the Parisian area and the poor number of researches for dog-sitting on internet. It confirms that people in this area goes more often with cats as it is seen as “easier” than having a dog.

## 3 RESEARCH METHODOLOGY

### 3.1 Research objectives

The objective of the research is to answer the following research questions:

- What are the requirements to find a pet sitter?
- To what extent does French cities suffer from a lack of dog facilities?
- Does the criteria of choosing a pet sitter match with the new pet sitting solutions offered by start-ups?

The intent of this thesis is to understand what the requirements are to find a pet sitter considering the lack of facilities in French cities and how does start-ups interact in this process.

This chapter highlights the ways the researches are done including all the methods used for data collection and the different contact person. Each method of data collection is defined in detail with their limitations.

### 3.2 Research design

The research design of the thesis is based on a story telling strategy that makes it personal and easy to follow. The thesis starts with an introduction to the topic followed by personal motivation. Then, the research objectives and research questions are defined. Followed by literature review that intends to give in depth theoretical understanding of the marketing and branding theories linked to the pet owner buying behaviour.

The research consists in conducting a Focus group, a one-to-one interview and a survey along with the literature review.

The main part of the data comes from a online survey made on Google Form that is shared on social media. The questions in the questionnaire refer to the theoretical frameworks as well as the research questions. The questionnaire was held in French but the translation has been made in English.

The questionnaire is made from close ended questions and is easy to follow. A small introduction intent to give an overview of the research questions and objectives to make sure the participants help the researcher answer the research questions.

### 3.3 Research planning

Mixed methods were used as data collection. Mixed method includes qualitative and quantitative data methods.

The researcher used first qualitative data to provide an in-depth analysis of the pet owners and their behavior. In order to do so, a Focus group was conducted with 5 people from different backgrounds regarding their habits and issues.

The questions asked to collect qualitative data were open-ended. Thus, respondents were free to express their opinions which leads to collecting more information. That is also the reason it happened first. It gave new leads that haven't been considered beforehand and helped creating a quantitative survey to measure the phenomenon.

Both focus group and one to one interview were conducted by the researcher with respondents leaving in France.

A focus group consist of a group of people assembled to participate in a discussion. They have been brought together by the researcher to discuss a particular subject in order to solve a problem or suggest ideas It differs from simple interviews as the researcher does not interact with the participants and is just here to make sure the conversation stays focus on the topic. The participants are intended to represent the general opinion, that is why they must have different profiles. The discussion between them is recorded and analyzed by the researcher.

In one hand the focus group was conducted with 5 pet owners from different households and living area (eg: Paris, suburb of Paris, big cities, villages) and different age and lifestyle (23 to 73 years old). They discussed on the following topic: Issues pet owners face in "Ile de France". Although, the researcher has a fairly good idea about the likely responses, this is the most suitable way to treat it. Therefore, the structure of the interview was predetermined, and the questions were used as a guide to analyze the data.

On the other hand, a veterinary from Ile-De-France was interviewed in order to figure out what are the solution offered by veterinary for pet sitting and other issues pet owners

might encounter. This way, the researcher will have a better idea of the significance of the problem.

In addition to the qualitative data collection, quantitative data allowed the researcher to substantiate and support previous gathered answers, especially in the literature review. These data were collected via a survey made on Google Form so it was conducted online. The questions were asked in French and later translated in English (Appendices) as asking them in English would have limited the number of respondents due to language limitations. It was done as a cross sectional survey as the time scale is too short to conduct a longitudinal one over a significant period of time. Thus, the results and gathered numbers are the answers of close-end questions, multiple choice questions and rating scale questions. The survey was distributed via e-mail or social bias (LinkedIn, Facebook...)

### 3.3.1 Qualitative Data Collection

The mixed method was applied in the research, since both qualitative and quantitative questions were analyzed (Saunders, et al., 2012, pp. 164-165). During the Focus group, 5 people were interviewed at the same time via a Messenger video call. These people were chosen as they all live in Ile-de-France but in different areas, own at least one dog and have a different social profile. In addition, the participants are familiar with the researcher, thus, they were more willing to help with participating to this 30-minute video call (focus group).

1. Christelle: woman, living in a small village of 250 inhabitants, 53 years old
2. Estelle: woman, living in Paris, 25 years old.
3. Claudine: woman, living in the suburb of Paris, 73 years old
4. Olivier: man, living in a town, 44 years old
5. Kevin: man, living in a big city, 23 years old

The interview was not structured and planned beforehand in order to let the respondents express themselves to generate new leads for the researcher. The only question that was prepared is the following: "What kind of problems do you face in your daily life as a dog owner?" Then, the participants were able to discuss around this subject for 30 minutes while the researcher had a facilitating role to make sure the conversation is not deviating. The conversation was recorded with a phone to facilitate the translation and the data extraction. This is not really an interview as the researcher is not participating

much and just ask one question, then, listen to the conversation between the 5 interviewees. Her role is to make sure the conversation does not move away from the subject and to take notes.

On other hand, a one-to-one interview was conducted with Anne, a veterinary assistant for 9 years who is specialized in domestic pets such as dogs and cats but also the ones we call "NAC" which means in new kind of pets and describes rodents such as hamster, guinea pigs, rabbit etc...

Due to the high amount of work veterinary are facing, I had only the possibility to talk with Anne for 11 minutes. This person was selected because of the proximity she has with different pet owners and her experience.

The following questions were asked:

- Can you introduce yourself?
- Do you know if there is any doggie park in the area or other nice facility for dogs?
- Do you think that cities in Ile-de-France are dog friendly? Why?
- Is there pet owner asking you how they can pet sit their dog?
- What do you tell them?
- Do you think that making cities more dog-friendly would reduce the number of drop-outs in Ile-de-France?

### 3.3.2 Quantitative method

For the quantitative part of the research, a cross sectional survey was conducted as previously intended. The questions were chosen in order to verify the gathered data from the introduction and literature review sections (see appendices) as well as the leads from the qualitative analysis. 85 people answers the questionnaire. It was administered via social media such as Facebook and LinkedIn. The respondents were somehow chosen has the researcher shared the survey on Facebook groups concerning dog activity such as Agility.

### 3.4 Methods reliability and limitations

Both qualitative and quantitative studies can't be generalized to the entire population. This is typical of a case study approach. The participants of the focus group were all from the Parisian area, the results of a focus group in the south-est of France could be

different. In addition, the survey was display by the researcher and the panel of respondents is not 100% representative of the French population. As a matter of fact, men are not represented enough just as people living outside the Parisian area.

## 4 RESEARCH ANALYSIS

### 4.1 Focus group analysis

During the Focus group, 5 people were interviewed at the same time via a Messenger video call to respect the quarantine restrictions of the French government. The interview was not structured and planned beforehand in order to let the respondents express themselves to generate new leads for the researcher and confirm the ones she already had. Even if the interviewees are known to the researcher, the first question aimed to make sure everybody filled the criteria.

Q1. Can you confirm that you all own at least one dog and that you live in Ile-de-France? All the participants do live in Ile-de-France and in different areas and own at least one dog.

Q2. What kind of problems do you face in your daily life as a dog owner?

The first topic that came out from Claudine who is a retired woman. She always brings her dog in holidays with her. There is no way she would go somewhere without the dog. Thus, the problematic was the hotel, where to stay when you have a dog? is it going to be accepted? If yes for what price? A lot of hotel applies extra charge for having a dog. Then came the questions of the activity, beaches and restaurants needs to be checked in advance as just a few are open to dogs. That is why Estelle entered the conversation with saying that she is not even considering bringing her dog in summer holidays with her and rather hire a pet sitter.

Her problem comes with the price and the availability of it. As she is leaving in Paris she has to go in the suburb to find a pet sitter that has a garden as it is a mandatory criterion for her. Her second criterion is the price, since the offers are rare, prices are often rising too much. In addition, she must book it 6 months in advance to be sure to have a spot.

Kevin agreed with Estelle as he is leaving in a big city where the conditions are similar to Paris and added that for him the everyday life is not the easiest. He does not have a garden and parks are getting more and more strict. He once got a fine for walking his dog without a leash. He talked about doggie parks that he discovered while travelling and wish it was available in France. All participants agreed with the fact they would use such a facility if they had one near their living place.

This conversation lasted half an hour and all the participants were allowed to give their point of view.

However, the only participants that had nothing to complain about was Christelle as she is living in a small village of 250 inhabitants, she said that a neighbor comes to her house to take care of the dog when she is not here and that she can go to the forest to have a walk.

All in all, 4 out of 5 people agreed to say that they encounter problems in their everyday life with their dog that could be solved.

However, the researcher submitted the idea of robotic solutions such as the Furbo robot and only 2 out of 5 respondents were interested, the rest claimed that they want their dog to get friendly human contact when they are absent.

The data collected during this focus group confirmed the leads of the researcher and gave an overview of what is the situation in Ile-de-France.

#### 4.2 Interview analysis

The interviewee was a veterinary assistant from Couilly-Pont-aux-Dames called Anne. The veterinary was chosen as it is the one the researcher goes with her dog. Thus, the seriousness, experience and the professionalism of this veterinary is no longer to prove. The questions of the one-to-one interview were firstly sent by e-mail, then it was conducted by phone and recorded, it lasted 11 minutes. The interview was in French and was translated in English for the purpose of this thesis.

Q1. "Can you introduce yourself?"

Anne has been working as a veterinary assistant there for 9 years she is specialized in domestic pets such as dogs and cats but also the ones we call "NAC" which means in new kind of pets and describes rodents such as hamster, guinea pigs, rabbit etc...

Q2. Do you know if there is any doggie park in the area or other nice facility for dogs?

The second question consisted in knowing what kind of recommendation they would have to someone wanting to find a pet sitter in the area. The answer was quick: "we don't have any". Anne explained that all the professional from the area she knew closed their business or moved to another region; most of them couldn't make a salary out of this activity. The only solution she mentioned was a colleague of her who does private dog sitting as an additional income on her free time.

Q3. Do you think that cities in Ile-de-France are dog friendly? Why?

She was also asked about the facilities for dogs in the region and was able to give us some education center, trainers and forest/parks where it is possible to go with a dog to hike or just have a walk but none of these places were made for dogs.

There is no park where it is accepted to free the dog and walk him without any leashes. However, the interviewee recognizes that even though you are not supposed to do it (risking a fine), most of the people just do it especially when they don't have a garden.

Paradoxically, Ile-de-France is also the region where people have the less gardens in France as there is less space and the real estate is really coveted.

As Anne said: "This is really sad that we don't have any doggy-parks here as people would really use it. A lot of clients actually ask me if I know about such a thing."

Q4. "Are there pet owners asking you how they can pet sit their dog? If yes, what do you tell them?"

She explained that they actually have a lot of people calling them or coming to ask where to leave their dogs for the holidays, especially in summer. These people do not have any solutions with family member or friends and are looking for a professional. They explain that they can find dog-pension on the Internet, but they don't want to let their dog lock down in cage for days or weeks. The decline of customers for this kind of shelter force them to shut down and, in the end, people don't even have this solution anymore. Thus, the solution is often private sitting found with word of mouth or websites.

However, according to Anne, this solution can be the best but can also be the worst, some tragedy happens when owners find their sitter on internet and don't know them. The problem is that there is no insurance or anything as it is not declared. Thus, she advises her clients to go to a friend of her when she can.

Q5. Do you think that making cities more dog-friendly would reduce the number of drop-outs in Ile-de-France?

To conclude, the assistant was asked about facilities in french and drop-outs. She explained that making the life of dog-owner easier could only prevent from drop-outs and enhance the life of the owner as well as the dog!

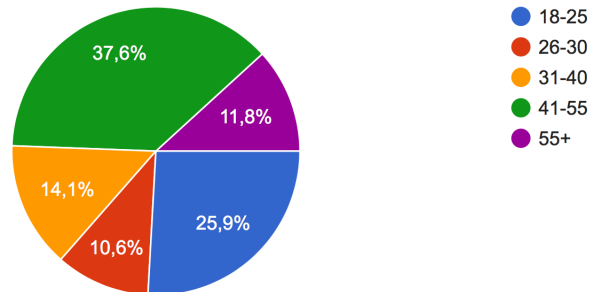
### 4.3 Survey analysis

The survey was conducted online and spread through social media. It particularly spread on Facebook as the researcher has a wider network there. The respondents were chosen according to their possession of a dog.

The questionnaire was made on Google Form and anyone having the link of it was able to answer.

Respondents were able to answer it from **28th of February until 2<sup>nd</sup> of April**. Thus, the survey was active for a month. It has been distributed through the personal Facebook account of the writer as well as pet owners Facebook group related to dog topics such as “agility group from Ile-de-France”. and shared by 10 other people on their own social media.

The actual sample of the survey was 85 people. The number of responses did not spread well since 88,2% of the respondents were females and 11.8% respondents were males. The respondents’ ages were well spread (see figure 8). However, with 37,6% located between 41 and 55 years, the majority belongs to this age group.



*Figure 7. Respondents age (from the survey, primary data)*

The respondents represent various types of pets, dogs, cats, reptiles, rodents, fish but the majority of respondents are dog owners (67,9%) followed by the cats owners (57,1%).

The following sections discuss the gathered data and compare it with the theory from the previous chapters.

### 4.3.1 The dog and owner relation

Q1. Would you cut the budget allowed to your pet if you were facing a financial crisis? (e.g choose cheaper kibble, buy less toys...)

This question allowed us to acknowledge the fact that facing a crisis, pet owner would rather cut their own expenses than their dog's. In fact, 68,7% of the respondents would not lower the quality of life of their pet on a financial crisis.

Q2. Do you consider your dog as a family member?

However, what unifies almost all the pet owners is that they consider their pet as a family member (97,6%) which acknowledge and confirm that the status of the pet is changing (see introduction p.6). Pet owners have embraced the pet-owning and pet-loving lifestyles to a far greater extent than their elders.

Q3. How much money do you spend for your pet monthly?

Considering that a dog weighing around ten kilos and fed on Premium-type kibbles costs on average € 15 to € 40 per month (Santévet, 2015). A dog that does not encounter any particular health problem costs around € 100 to € 300 per year for veterinary costs (vaccines, sterilization, dewormers, etc.).

However, to this question, the large majority of the respondents spend more than 50€ per month (see figure 8) which is way more than the advised amount from Santévet. Apart from food, the first expense pet owner claim to have is toys before veterinary. It confirms the theory of the mutation of the way pet owner treat and interact with their pet.

**Combien dépensez vous environ par mois pour votre animal de compagnie?**

83 réponses

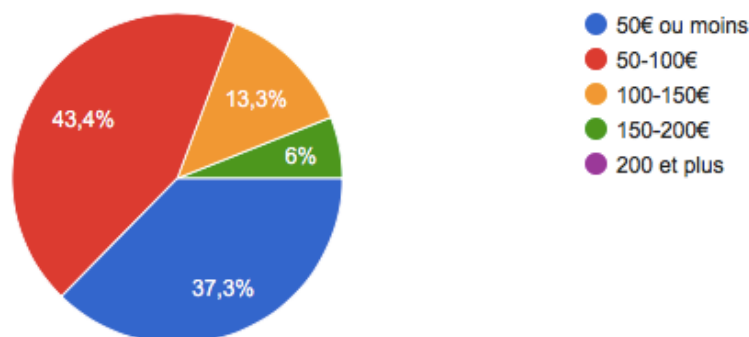


Figure 8. Monthly expenses on pets (from the survey, primary data)

#### 4.3.2 Requirements and criteria in the process of looking for a sitter.

Q4. What are the most important criteria when choosing your pet sitting solution?

As a consequence of the way pet owners consider their pets, finding a pet sitter becomes always more challenging. For 71,6% of the respondents, it is important to make sure that their pet is not going to be in a cage (dog kennel) which makes it the first criteria when choosing a sitter. Apparently, dog owners value private individuals more than kennels as their pet is going to be in a familiar environment including a house with people and sometimes other friendly pets. In addition, 62,7% consider it mandatory to know the person that is going to take care of their pet (family member, friends etc). Thus, trust is a significant criterion for pet owners such as for parents. This is why advocacy and word of mouth is so crucial for dog sitting companies (see literature review: 2.3.7 "Customer advocacy" p.20). Both "Having a house with a garden" and "an experienced sitter" are tied up, 44,8% of the respondents considered it as one of the most important criteria. Considering all these criteria, the prices of dog sitting companies are not always affordable.

Q5. If you own a cat and not a dog, why did you choose it ?

As a matter of fact, the further question revealed that among the respondents that chose not to have a dog, 27,5% blame a lack of affordable and easy way to sit it.

#### 4.3.3 Lack of facilities in French cities.

In the other hand, about one of the fifth respondents (20,6%) that does not have a dog, deplore a city not adapted to them. Surprisingly, only 6,9% of them chose not to have a dog because they don't like them.

Q6. Have you noticed dog facilities in your neighborhood or city?

Only 37,8% of the respondents record at least one park where dogs are accepted in their city. Also, only 9,5% of the respondents are aware of the existence of a doggy park (which are the parks for dogs only) in their living area. Those parks are common and easy to find in other countries such as Germany, Finland, USA... but a challenge to find in France. As a matter of fact, as a pet owner I personally struggle to find one and never heard about one in Ile-de-France just as 42,7% of the respondents.

Q7. What problem do you face in your daily life with your dog?

In addition, 41,5% of the surveyed people lack dog pick-up kit for their dog's faeces. However, there is no shortage of veterinary and grooming services as 66,2% of the respondents claim to have at least one veterinary in their city and 52,7% have at least one grooming salon in their city as well. Since cat owners does not suffer from any lack of facilities in Ile-de-France, cats are more often adopted than dogs in this area (see literature review 2.4.1 "Overview of the pet population in France" p.21). As a consequence, I agree with Anne that making the everyday life of dog owner easier with spending more in dog facilities could prevent abandon or at least make people want to adopt a dog.

#### 4.3.4 Start-ups and dog-sitting

The respondents were asked about their opinion on two different kind of new solutions: Holidog and Furbo.

##### Holidog : a revisited pension

Created in 2012, available in 23 French cities and leader on the European market, the company Holidog offers sitting solutions adapted to the needs of owners and their animals. "I had this idea while on vacation in 2005. I couldn't leave my dog with someone I trusted. I had to take it with me and I understood that it would be so much better in a family close to our home rather than subjecting it to the transport, the heat, the loneliness of long days on the beach " (Julien Muller,2014).

Holidog innovates and expand the scope of the pet sitting industry with renewing the idea of pension. "No more pensions, long live pet sitting, Trade daily boredom for wild games with his pet sitter." (Holidog website). "Petsitter" is a general term here to designate anyone who takes care of animals (care, walk, ...). Each service on the website represents an aspect of this role: GoHoliday (for when customers are away for 2 to 30 days), GoNanny (petsitting, for a few hours only, per day), GoWalk (for dog walks), GoSchool (for dog training and education, a certificate / diploma will be required).

## Furbo: a robotic approach

"See, talk and toss treats no matter where you are!"

Furbo is a two-way pet camera to enable the pet owner to hear and speak to his dog.

It has a clear 1080p Full HD resolution, 4x zoom, 160° wide-angle and night vision. It is the most advanced pet cam out there.

Furbo is the only pet camera with treat dispenser designed just for dogs.



Figure 9. Furbo camera characteristics

### 4.3.5 Results of the survey

Q8. Do you use a pet camera to check on your dog during the day? (like Furbo camera)

Only 4,5% of the respondents uses a camera like Furbo to check on their dog during the day.

Q9. Would you be ready to use a robotic solution to pet sit your dog? Such as a camera with a timer that gives the keebles.

Indeed, Robotic solutions are not really welcome by the respondents as 78,2% of the surveyed people claim to be against the idea of using any robotic installation whether it concern the use of a camera, an electronic keebles dispenser with customizable times or an automatic cat flap detecting the animal's chip.

Q10. What do you do when you go in holydays without your pet?

Among the respondents, three-quarters (74,5%) of them don't use any sitting solution as they bring their pet in holydays or leave it to a relative. The last quarter claim to find their solution by referring to word of mouth mainly since only 3% of them found it on internet and 2% saw an ad at their veterinary office. To attract this last quarter, dog sitting companies like Holidog must invest in the post purchase experience since this is going to create a loyalty loop as well as advocacy which is the best advertising solution (see literature review: 2.3.7 "Customer advocacy" p.20)

Q11. How much money do you pay for a day of dog sitting? Would you be ready to pay more if you had a better service?

Regarding the pet owners that have to pay for their pet sitting solution, the average spent per day is between 10 and 15€. However, only 51,9% of them would be ready to pay more than what they pay now in order to get a better service which is inconsistent with the increase of spending in this industry.

# 5 CONCLUSION AND IMPLICATIONS

## 5.1 Research findings

The objective of this thesis was to study the issues pet owners encounter while living in the metropolitan France and more precisely in the Parisian area, and thus, based on the research findings, make suggestions for improvements. As a result, the evolution of the relation between owners and their pets will be highlighted to see what are the impacts of it on the pet industry.

➤ What are the requirements to find a pet sitter?

The first research question established what the requirements are to find a pet sitter and shows a correlation between parents and pet owners concern such as the familiarity with the sitter and the required experience. This is firstly based on trust gained whether by proximity or certifications/references. The responses also demonstrate that owners avoid old solutions such as kennel since the main factor in choosing a pet sitter is to make sure it is not going to be locked in a cage. The idea is to make sure the dog is going to be in a familiar environment surrounded by love and space. Dog owners especially goes for family options such as private individual or small businesses, they are attracted by the idea of their dog receiving a specific treatment. They want their dog to be in a house with a garden. What is important here is to know that the pet is going to be safe in a familiar environment and not traumatize by a lockdown.

➤ To what extent does French cities suffer from a lack of dog facilities?

The second question measured the lack of facilities in French cities. It turns out that owners are satisfied with the number of grooms and veterinary but suffer from the lack of parks where dogs are accepted and even more from the non-existence of doggy parks. Especially for the people that traveled, they notice a large amount of this kind of parks exclusively for dogs in other countries such as Germany, USA, Finland and so on. On the other hand, the respondents of the survey living in the countryside do not deplore the lack of those since they can free their dog in large area such as fields and forest. However, they still miss some installations providing dog's feces bag. From my point of view, it would be relevant to also invest on dog facilities in order to attract new comers and create a better atmosphere in the city.

➤ Does the criteria of choosing a pet sitter match with the new pet sitting solutions offered by start-ups?

Finally, the last research question was about trying to find out if start-ups could enhance the scope of solution regarding pet sitting. According to the responses, robotic solutions are not really welcome by pet owners, 78,2% of the surveyed people claim to be against the idea of using it. However, considering that 63,5% of the respondents were older than 30 years old, it would be relevant to conduct the same survey with only millennials to see the difference of the answers. I think that this generation will be more attracted by this kind of product since they are more familiar with it. In addition, robotic installations are not well known yet in France which explains why owners do not really trust it now. Contrarily, websites and mobile applications putting pet sitter and owner in relation (such as Holidog) are promising. Indeed, it fits more the criteria of pet owners when looking for a sitter. They can choose the one they found trustworthy as well as the environment their pet is going to stay in.

## 5.2 Suggestions for further research

According to the conducted survey, French cities did not adapt to the change of the relation between the owner and his pet. Despite the self-evident reality of the evolution in the way people treat their pets, owners still deplore an important lack of doggie parks and other facilities in their cities. Curiously, big such as smaller cities are rolling out some fantastic city branding projects in order to attract both residents and visitors. These branding projects are giving the cities involved a new look and atmosphere. It is seen as vital and is a key component in successful towns and cities from around the World. In addition, friendlier dog cities would encourage people to adopt dogs which is really needed in France considering the number of abandoned dogs.

Thus, I am wondering if there are some cities that manage to combine city branding with a dog friendly approach. If yes, what are the benefits of it? Is it measurable in terms of new comers?

In the other hand, it could be interesting to conduct a longitudinal survey to analyze the evolution of the relation between dog owner and their dog. For example, we could do the same survey in 10 or 15 years to compare the spending habits and amounts of pet owners.

## 6 SOURCES

### Electronic articles:

Avisé info, 2017. *Soins aux animaux : le toilettage et bien plus encore*. Available at: <<https://www.avise-info.fr/services/soins-aux-animaux-le-toilettage-et-bien-plus-encore>> [Accessed 20.01.2020]

Bass.A, 2017. For the love of dog Available at: <<https://www.1843magazine.com/dispatches/dispatches/for-the-love-of-dog> > [Accessed 20.03.2020]

Blouse médicale, 2018. *Quel est le nombre de vétérinaires en France?* Available at: <<https://blog.blouse-medicale.fr/les-actualites-monde-medical/quel-est-le-nombre-de-veterinaires-en-france/05/2018/175/>> [Accessed 20.01.2020]

Économie Magazine, 2019. *Le marché des animaux de compagnie : les chiffres clés, état des lieux*. Available at: < <https://www.economie-magazine.com/dossier-16-marche-animaux-compagnie-chiffres-cles-etat-lieux.html>> [Accessed 10.11.2019]

Epsilon INSEE, 1991. *Les français et leurs animaux familiers : des dépenses en forte hausse*. Available at: <[https://www.epsilon.insee.fr/jspui/bitstream/1/20515/1/estat\\_1991\\_241\\_5.pdf](https://www.epsilon.insee.fr/jspui/bitstream/1/20515/1/estat_1991_241_5.pdf)> [Accessed 23.01.2020]

FACCO, 2017. *Les chiffres pour tout savoir sur le marché du petfood*. Available at: <<https://www.facco.fr/les-chiffres/>> [Accessed 23.01.2020]

FACCO, 2019. Enquête Kantar/FACCO 2018 : 50% des français ont un animal de compagnie... Mais lequel ? Focus sur les chiffres de la population animale Available at :< <https://www.facco.fr/30-millions-damis-et-plus-encore/> > [Accessed 23.01.2020]

Flick.S, 2015. How to build brand advocacy in 5 simple steps. Available at: <https://www.business.com/articles/how-to-build-brand-advocacy-in-5-steps/> [Accessed 09.03.2020]

French Gouv, 2019. *Comment faire garder son animal de compagnie?* Available at: <<https://agriculture.gouv.fr/comment-faire-garder-son-animal-de-compagnie>>[Accessed 27.11.2019]

Gaillard.E, 2020. *La cause animale: véritable levier de vote pour les municipales 2020.* Available at :< <https://www.30millionsdamis.fr/actualites/article/18327-la-cause-animale-veritable-levier-de-vote-pour-les-municipales-2020/> >[Accessed 01.03.2020]

Hutin. R, 2019. *La France championne d'Europe des abandons d'animaux : le palmarès de la honte* Available at :< <https://www.30millionsdamis.fr/actualites/article/16530-la-france-championne-deurope-des-abandons-danimaux-le-palmares-de-la-honte/> > [Accessed 01.03.2020]

Leparisien, 2016. INTERACTIF. *Les Français et les animaux de compagnie en chiffres.* Available at: <<http://www.leparisien.fr/archives/interactif-les-francais-et-les-animaux-de-compagnie-en-chiffres-03-10-2015-5151599.php>>[Accessed 14.11.2019]

Les echos, 2018. *La concurrence s'intensifie dans les services de garde d'animaux domestiques.* Available at: <<https://www.lesechos.fr/industrie-services/conso-distribution/la-concurrence-sintensifie-dans-les-services-de-garde-danimaux-domestiques-136461>> [Accessed 16.11.2019]

L'express, 2019. *La France, championne européenne de l'abandon d'animaux.* Available at: <[https://www.lexpress.fr/insolite/animaux/la-france-championne-europeenne-de-l-abandon-d-animaux\\_2084807.html](https://www.lexpress.fr/insolite/animaux/la-france-championne-europeenne-de-l-abandon-d-animaux_2084807.html)>[Accessed 10.11.2019]

Mittal.B ,1989. *Psychology & Marketing.* Available at: < <https://onlinelibrary.wiley.com/doi/abs/10.1002/mar.4220060206> > [Accessed 10.01.2020]

*Pet industry forecast, 2019.* Available at: <<https://www.petsit.com/site/get.php?id=125455>> [Accessed 10.01.2020]

Picard.M, 2017. *Frénésie dans le business des animaux.* Available at: <<https://www.lsa-conso.fr/frenesie-dans-le-business-des-animaux,275217>> [Accessed 02.11.2019]

Santévet, 2015. Un chien, combien ça coûte ? Available at: <<https://www.santevet.com/articles/un-chien-combien-ca-coute>> [Accessed 07.03.2020]

Surendran.A, 2019. *Qualitative data- definition, types, analysis and examples*. Available at: <<https://www.questionpro.com/blog/qualitative-data/>> [Accessed 14.11.2019]

Zimmermann.F, 2019. Digital Marketing Funnel: Is The Traditional Funnel Still Valid? Available at < <https://www.socialmediagids.com/digital-marketing-funnel-is-the-traditional-funnel-still-valid> > [Accessed 09.03.2020]

Zuback.J, 2017. *How to deliver value at every stage of the consumer journey*. Available at: <https://powerdigitalmarketing.com/blog/how-to-deliver-value-at-every-stage-of-the-customer-journey/#gref> [Accessed 09.03.2020]

**E-book:**

*Pet sitter policies*. Available at: <<https://www.petsit.com/site/get.php?id=82791>> [Accessed 26.01.2020]

Court.D, Elzinga.D, Mulder.S, Jørgen Vetvik.O, 2009 “The consumer decision journey” Available at: <<https://www.mckinsey.com/~media/McKinsey/Business%20Functions/Marketing%20and%20Sales/Our%20Insights/The%20consumer%20decision%20journey/The%20consumer%20decision%20journey.ashx>> [Accessed 06.02.2020].

**Book:**

Gordon. C, Richard.J, 1988 PROBLEM RECOGNITION: THE CRUCIAL FIRST STAGE OF THE CONSUMER DECISION PROCESS

Krishnaswamy, O.R. 2010. Business research methods

Millman,D. 2011. Brand thinking and other noble values. New York: allworth press

Peter.JP, Olson.JC, Grunert.KG. 1999 *Consumer behavior and marketing strategy*

Saunders M. et al. 2016. Research Methods for Business Students. Sixth Edition. Prentice Hall.

Solomon.M, Barmossy.G, Askegaard.S, Hoog.M. 2009“*Consumer behavior: a European perspective 4<sup>th</sup> edition*”

### **TV programmes:**

LCI, 2019. *À combien s'élève le budget alloué aux animaux de compagnie?*

<https://www.lci.fr/population/a-combien-s-eleve-le-budget-alloue-aux-animaux-de-compagnie-2116901.html> [Accessed 10.11.19].

### **Independent publications**

Cengiz,E. 2010. *MEASURING CUSTOMER SATISFACTION: MUST OR NOT?* Journal of Naval Science and Engineering, Vol. 6 , No.2, pp. 76-88. Istanbul University Faculty of Political Sciences Department Of Business. Available at: <[https://s3.amazonaws.com/academia.edu.documents/53192166/044\\_Emrah\\_Cengiz.pdf?response-content-disposition=inline%3B%20filename%3DMEASURING\\_CUSTOMER\\_SATISFACTION\\_MUST\\_OR.pdf&X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Credential=AKIAIWOWYYGZ2Y53UL3A%2F20200206](https://s3.amazonaws.com/academia.edu.documents/53192166/044_Emrah_Cengiz.pdf?response-content-disposition=inline%3B%20filename%3DMEASURING_CUSTOMER_SATISFACTION_MUST_OR.pdf&X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Credential=AKIAIWOWYYGZ2Y53UL3A%2F20200206)> [Accessed 06.02.20].

### **Dictionary**

Business dictionary, <http://www.businessdictionary.com/definition/brand-management.html> [Accessed 06.02.20].

### **Tool**

Google Form

Google Trends

Google Scholar

### **Class**

Manninen. A, 2020. Brand management

## 7 APPENDICES

Interview questions, veterinary of Couilly-pont-aux-dames

- Can you introduce yourself?
- Do you know if there is any doggie park in the area or other nice facility for dogs?
- Do you think that cities in Ile-de-France are dog friendly? Why?
- Is there pet owner asking you how they can pet sit their dog?
- What do you tell them?
- Do you think that making cities more dog-friendly would reduce the number of drop-outs in Ile-de-France?

Survey questions:

- Are you:
  - A man
  - A woman
  
- How old are you?
  - 18-25
  - 26-30
  - 31-40
  - 41-55
  - 55 +
  
- Where do you leave?
  - in Ile-de-France
  - Somewhere else in France
  - Abroad
  
- Do you have a pet?
  - Yes
  - No
  
- What kind of pet is it?
  - Dog
  - Cat
  - Rodent
  - Reptile
  - Fish
  
- If you own a cat and not a dog, why did you chose it,
  - I don't like dogs
  - It is not independent enough

- I don't have a garden
- My city is not dog friendly (lack of facilities)
- I don't have time
- I cannot afford a dog sitter
- Other

-How much money do you spend for your pet monthly?

- 50€ or less
- 50 -100€
- 100 - 150€
- 200 +€

-Would you cut the budget allowed to your pet if you were facing a financial crisis? (e.g choose cheaper keebles, buy less toys...)

- Yes
- No

-What do you do when you go in holidays without your pet?

- I leave it with friends or family
- I have a pet sitter coming to my house
- I leave him/her to a private individual pet sitter'house
- I leave him/her at a pet hotel
- I leave him/her to a kettle
- I always find a solution to bring him/her with me
- Other solution ....

How did you found your dog sitting solution?

- Word of mouth
- It's a relative
- Internet
- Advertising

-If you have a dog, How much money do you pay for a day of sitting:

- Nothing
- Up to 10€
- 10-15€
- 15-20€
- 20 +

-Would you be ready to pay more if you had a better service?

- Yes
- No

-Would you be ready to use a robotic solution to pet sit your dog? Such as a camera with a timer that gives the keebles.

- Yes
- No

-What are the most important criteria when choosing your pet sitting solution? (choose max 3)

- Experience
- Known person
- Professional
- Individual having a dog
- Activities (walk)
- Garden
- Facilities close (park, vet)
- No cage
- Insurance eg Holivet in case of an accident

-Apart from food, what kind of expense do you do for your pet?

- Toys
- Vets
- Comfort (e.g: dog bed)
- Accessories (collar, leashes, clothes)
- Others...

-Do you use a pet camera to check on your dog during the day?

- Yes
- No

-Have you noticed dog facilities in your neighborhood or city?

- Free doggie biobags
- Park where dogs are allowed
- Canisette
- Doggie park (closed area reserved for dogs)
- Others...

-What problem do you face in your daily life with your dog?

- lack of vets
- lack of groom
- lack of parks where dogs are accepted
- lack of doggie parks
- Others...

-Do you consider your dog as a family member?

- Yes
- No