

ANNUAL RESEARCH REPORT
2019



**Pet Licensing in
North America**

ATTITUDES | PERFORMANCE | BEST PRACTICES

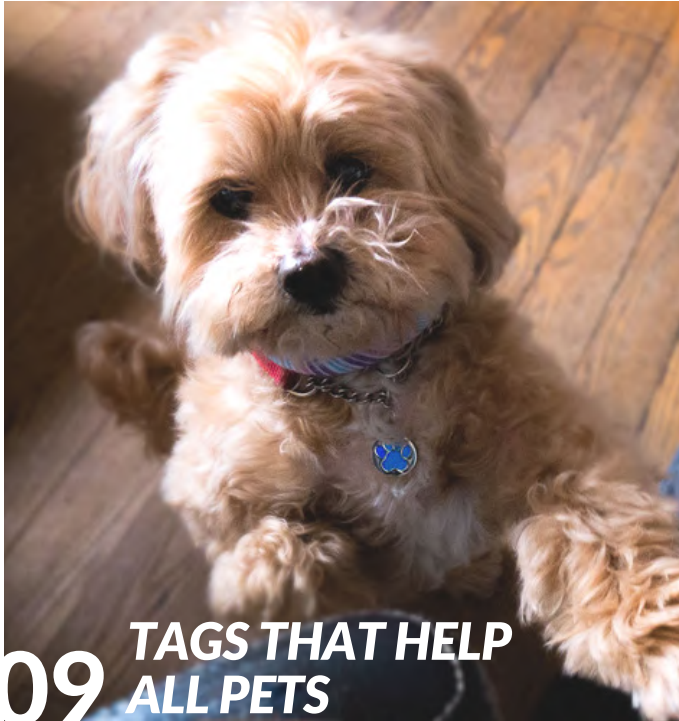


Helping you do what you do best

Finding safe and happy homes for every pet

DocuPet's mission is to help provide a safe and happy home to every pet in North America. We do this by providing communities and shelters with innovative pet licensing solutions, and by ensuring that pet owners find licenses to be as valuable as their local animal welfare providers do. To achieve our collective mission, and to ensure we are always listening, learning and sharing, we collect new data, synthesize it into actionable insights and make it available to all animal welfare and care providers.

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A man with dark hair and glasses, wearing a blue short-sleeved button-down shirt, is looking down at a small, fluffy brown dog on a wooden deck. The background shows a blurred outdoor setting with trees and a wooden chair.

From Our CEO

Our social enterprise was founded to help address the considerable lack of adherence to mandated pet licensing ordinances and by-laws. This is not because we are concerned about law-breaking pet guardians, but rather because we know that pet license fees are a significant source of funding for frontline animal welfare provision, and that properly identifiable animals are five times more likely to be returned home safely if lost.

Since 2014 we have worked to understand the reasons why just 13% of pet owners license their animals. We have talked to pet licensing program operators, consulted with animal shelter managers, and gathered feedback and behavioral understanding from hundreds of thousands of pet owners - all in pursuit of a holistic solution to a North America-wide opportunity.

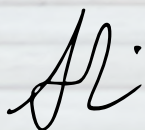
While we are pleased with our results to date - last year we increased license sales by more than 85% in our partner communities - we know that we still have much to learn and do. In this pursuit, we have conducted our second annual Pet Licensing Industry Report.

We believe that beyond efficient systems, better reporting, and improved service provision for all parties, pet licensing needs a re-think. Pet owners need to consider registration an essential benefit to their own pets **and** to all the local pets in need of long-term happy homes.

Likewise, pet licensing program operators need to provide valuable services to licensees, to interact with pet owners more frequently, and to take the time to explain just how important licensing-funded programs are to animal welfare initiatives.

Thanks to the many participants in this survey who took the time to respond. We were able to collect even more data points this year, and are keen to share what we've learned with all of you - the animal care and control administrators with whom we share our mission - to find a safe and happy home for every pet.

Happy reading!

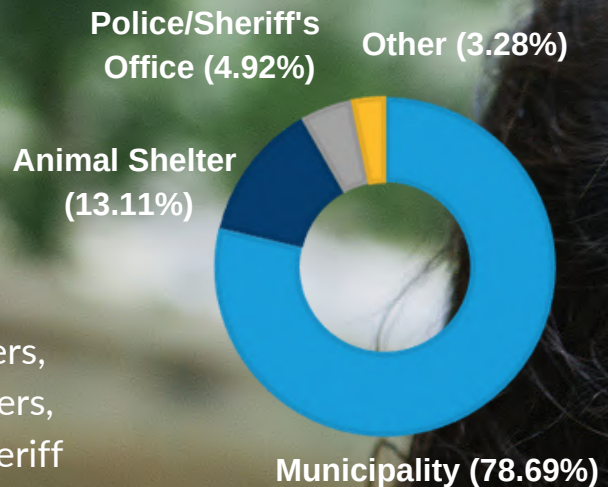
A handwritten signature in black ink, appearing to read 'AG'.

Grant Goodwin

About This Report

This is our second annual Pet Licensing Industry Research Report. Our methodology this time around remained consistent with that used last year, but we have studied several new topics to provide the latest industry insights into the attitudes, performance, practices, and policies of Pet Licensing Organizations (PLOs) across the continent.

To prepare this report we sent a survey to more than 400 managers of PLOs across the United States and Canada. We received 80 responses, of these survey respondents, 79% were municipal (city, town, county) managers, 13% were affiliated with animal shelters, 5% were associated with police or sheriff departments and 3% selected "other".



We also used information collected from our many consultations with PLOs in the past year. Additional data was collected by reviewing the pet licensing web pages of more than 600 jurisdictions.

+ 600 DATA POINTS

What would increased compliance mean to you?

from a pet licensing manager's perspective

"Our shelter would be well-funded, our impounds would decrease significantly and the revenue could be put to use for community programs such as additional low-cost spay/neuter, humane education, low-cost vaccines and veterinary care."

- Colorado

"It allows us to return dogs to their owners in a more timely manner. This means fewer dogs at the shelter and for shorter periods of time, resulting in less stress for the animal."

- Kentucky

"It helps spread the word on how important it is to have your dogs receive their rabies vaccinations. It is also beneficial to our ACOs and residents to be able to return more dogs straight back to their owners, without having to go to the shelter."

- Arizona

"Improved safety due to increased rabies compliance and responsible pet ownership. More revenue to address our field operations understaffing problem."

- California

"Pet licensing reduces the burden on SPCA/Humane Societies, as well as limits the staffing required to locate/re-home animals."

- Alberta

"More revenue to cover costs of operating our animal shelter and field operations."

- Missouri

"We would have a better understanding of how many pets there are in our city, the need for specific programs, the issues we need to deal with, and it would provide better records and accounting."

- Ontario

Financial Matters

License Sales Performance

In 2018 we assessed the average license sales reported by survey respondents against national pet ownership averages as estimated by the American Veterinary Medical Association. We learned that, overall, just 13% of pets were licensed. Broken down further, we learned that 23% of dogs were licensed compared to just 7% of cats (where mandatory licensing of cats was required).

What we heard...

How would increased compliance affect you?

"Not only would we have a better idea of what/how many animals are in our community, but we could also help to offset our budget more to justify adding staff for better programming."

- Pet Licensing Manager, Indiana

"Are your pet license sales increasing, decreasing or remaining stagnant?"

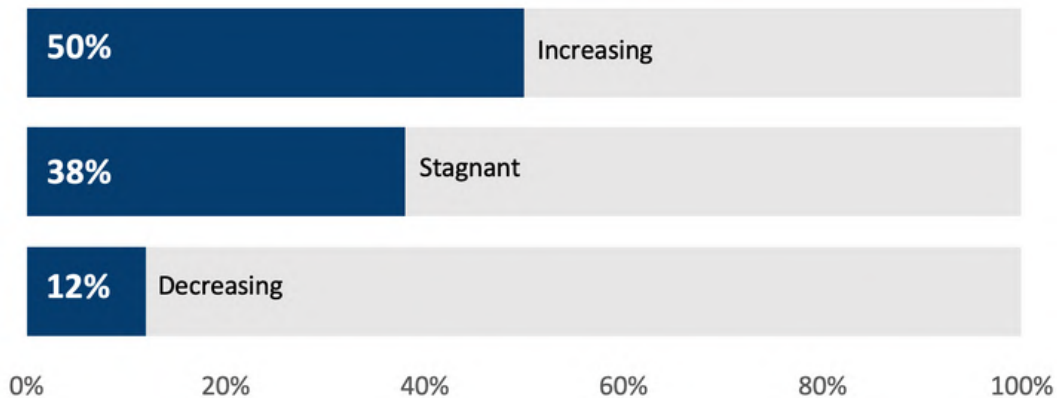


Figure 1: Respondents in 2019 were more optimistic about their recent license sales performance, with 50% stating their sales were increasing versus 38% in 2018. 50% reported stagnant or decreasing sales over the past three years.

Understanding that it's seven times easier to keep a customer than get a new one, we wanted to know how successful PLOs are at getting pet owners to renew licenses. We estimate that 8% of pets are not renewable each year due to extra-jurisdiction moves and passing. Considering a maximum success rate of 92%, we asked...

"At what rate are you renewing pet licenses?"

62%

Interesting to us: On average, our respondents estimated that just 62% of licensees renew their pet registrations each year.

Just How Big Is The North American Pet Licensing Market?

There are estimated to be over **161 million** cats and dogs in the United States and Canada. More than **90%** of dogs are required to be licensed by local or state law. Accordingly, **47%** of cats are required to be licensed.

Total "licensable" dog population: **70.4 million**
 Total "licensable" cat population: **35.4 million**

Total dog license revenue potential @ national average pricing: **\$1.26 billion**
 Total cat license revenue potential @ national average pricing: **\$540 million**

Estimated dog license sales, 2018: **\$290 million**
 Estimated cat license sales, 2018: **\$38 million**

Revenue Impact

In 2018 we learned that, while the most important reason for requiring pets be licensed was "animal identification", the second-most popular response was "revenue generation". This year we aimed to better understand how frequently pet licensing funds directly impacted the operational budget of animal control and care organizations which run licensing programs.

What we heard...

How would increased compliance affect you?

"Higher pet license revenue would mean less funding required of the partner cities and the county general fund."

- Pet Licensing Manager, Washington

"Does pet licensing revenue affect your budget directly?"

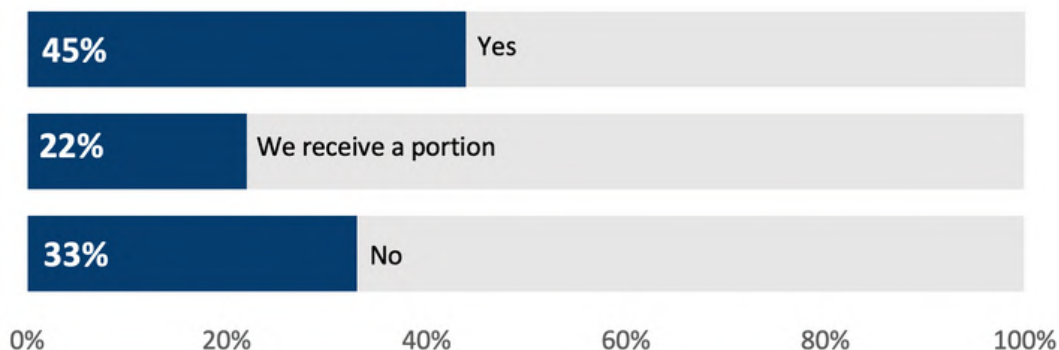


Figure 2: More than 66% of pet licensing organizations keep a portion or all of the licensing revenue they collect.

Cost Tracking and Management

Anecdotally we have learned that many organizations have a good sense of their sales numbers but understand their mailing, processing and labor costs to a lesser extent. This year we wanted to better understand how PLOs track and manage the costs of their licensing programs.

“Which scenario best reflects how the costs of your program are tracked?”

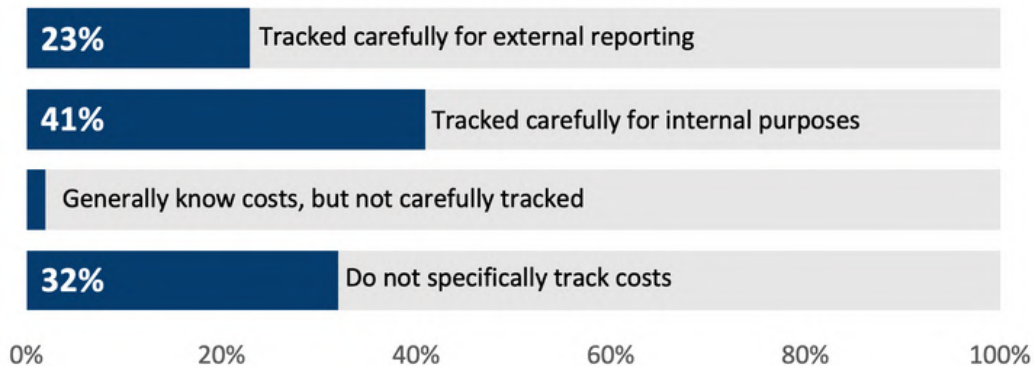


Figure 3: More than 33% of respondents said they do not track their costs carefully but either know them generally or explain that they are part of a larger budget item, making them difficult to segment.

“Do you believe that you are running a cost-effective program?”

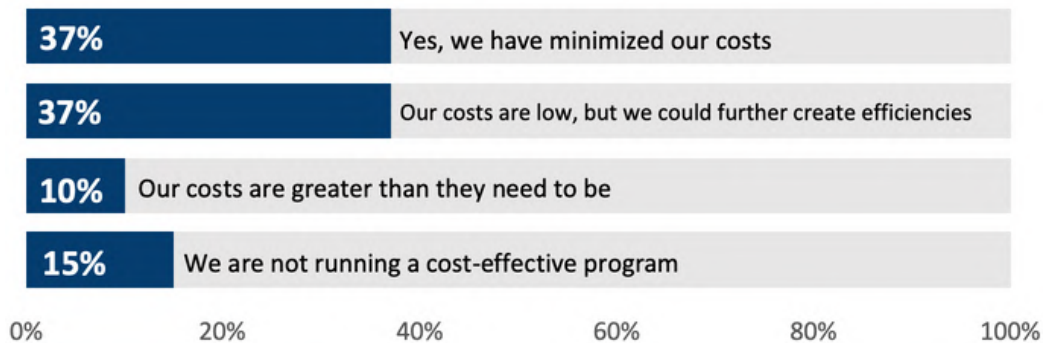


Figure 4: 25% of respondents feel they are not running a cost-effective program or that their costs are greater than they need to be. 37% suggested they could find greater efficiencies despite having low program costs in place already.



Calculate Your Community's Average Cost Per License

Due to the emphasis on the societal benefits of pet licensing, many communities ignore the potential source of revenue pet licensing can produce to subsidize the costs of animal services. Therefore, PLOs often experience low revenues or even deficits in their programs, once all the costs of providing a licensing program are accounted for.

One of the most common issues relating to these low profits is a lack of proper cost accounting. One third of PLOs fail to properly reconcile all of the various costs that go into their pet licensing program and therefore do not realize the loss of potential profit they are forfeiting.

How much is your pet licensing program costing you?

Step 1: Add up all of your variable costs (cost per each unit):

- + Cost of Tags x Number of Tags Sold Per Year
- + Cost of Mailing x Number of Tags Mailed Per Year
- + Cost of Renewal Letters x Number of Renewal Letters Sent Per Year
- + Cost of Citation Letters x Number of Citation Letters Sent
- + Cost of Commission x Number of Licenses Sold by Vendors
- + Online Order Processing Fees x Number of Licenses Sold Online

Total = _____

Step 2: Add up all of your fixed costs (costs incurred independent of the number of licenses sold):

- + Software Provider Fees Per Year
- + Number of Staff Dedicated to Pet Licensing x Average Salary Per Year
- + Marketing Material Budget Per Year

Total = _____

Step 3: Finally, add up the two numbers above and divide by the total number of licenses sold per year to get an accurate cost per license:

$$\text{Your Average Cost Per License} = \frac{\text{Step 1 Total} + \text{Step 2 Total}}{\text{Number of Licenses Sold Per Year}}$$

Tags That Help All Pets..

Each DocuPet tag makes a difference... To licensees, and to other animals in need

HomeSafe

Free with each pet license comes access to our HomeSafe™ service. If a pet becomes lost, anyone who finds them can file an online report using the unique code on the back of the tag.



Pet Owners can now personalize the back of their pet's tag with their name & contact info

We raise money for our Safe&HappyFund by:

- Donating 20% of product purchases, including Designer Pet Tags.
- Collecting direct donations from pet owners through our website.

Check out our newest designer tags:



DocuPet[®]
A safe and happy home for every pet

Tags That Help All Pets..

Most pet owners use pet tags to help their furry friends be easily identified if lost. However, recently it's become more common to think of a pet tag as an accessory – a visible piece of “pet jewelry” – that mirrors the pet's or pet owner's personality.

The History

Pet tags were originally designed solely for functionality. Although these functional components of pet licensing still exist today, pet owners are taking more ownership over and consideration of the accessories and products they purchase for their pets.

The Historical Tag



Did You Know: According to TechNavio's 2018 study, the Global Pet Accessories Market is expected to grow at a comprehensive annual growth rate (CAGR) of 6.72% during the period 2019-2023. The report cites the availability of a wide range of fashionable and multi-functional pet accessories as one of the main drivers.

Consumer Trends

Although there is clearly a large shift in consumer preference happening in the industry, pet licensing organizations have remained relatively stagnant in their market offering. *Why*, you may ask? Because the functional aspects of the tag have also remained relatively stagnant. For most pet licensing organizations, licenses today still exist solely to help identify pets and prove that rabies vaccinations are up to date.

A concern we frequently hear from pet licensing organizations and shelter staff is that, although a pet may actually be registered in their system, the owners rarely put the physical tag on their pet's collar. Although it seems irrational to leave your pet's "free ticket home" on the shelf, many pet owners are skipping the license tag in favor of more personalized and trendy accessories.

The Stakes

Despite the operating functionality of stamped aluminum tags, according to the American Society for the Prevention of Cruelty to Animals (ASPCA), US shelters are still seeing **6.5 million dogs and cats every year**. Every new animal that enters local shelters puts a strain on limited resources. To help combat this issue, pet license tags need to adjust to market trends if pet owners are going to adorn their pets with them daily.

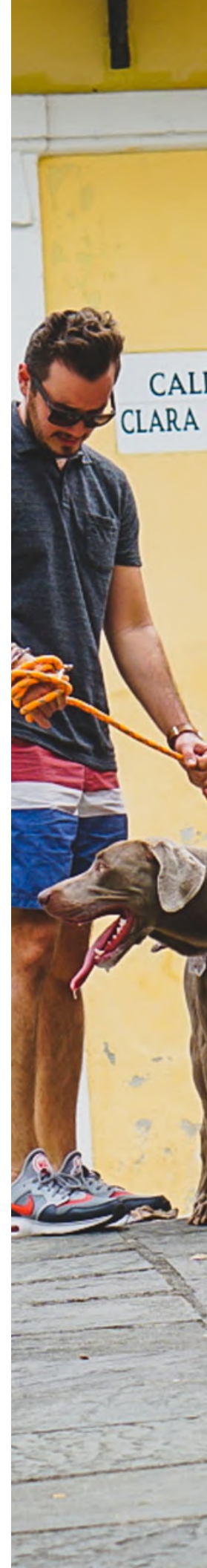
Tags With Value



Best Practices

In 2018 we began to examine the practices employed by PLOs aimed at increasing compliance. This year we further studied the tactics, services, programs, and policies being used to counter the known drivers of non-compliance by pet owners.

Pet Owner Value and Relationship



“In your opinion, why do residents choose not to license their pets?”

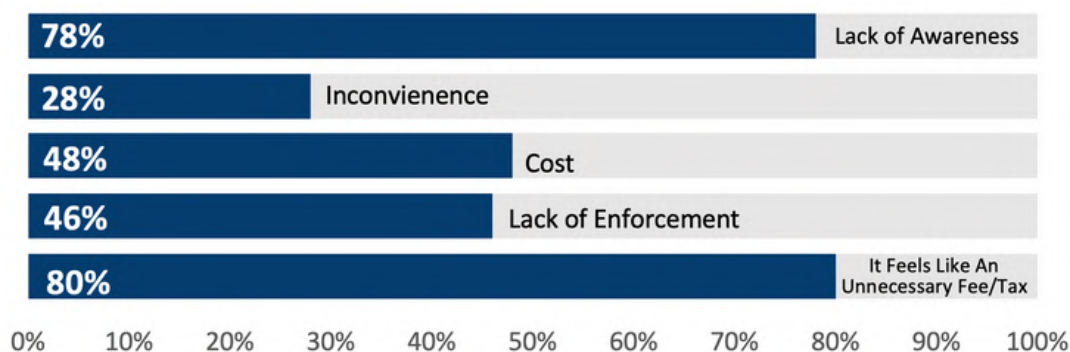


Figure 5: 80% of respondents believe that residents fail to license their pets because it feels like an unnecessary fee or tax (it doesn't provide value). 78% due to a lack of awareness of the need to license, 48% believe it is the actual cost of the license that deters registration, and 46% believe it is due to a lack of enforcement,

We've learned that pet owners are less inclined to purchase a license if it doesn't have perceived value to them. PLOs agreed, with 80% stating residents don't license because they feel the fees are unnecessary. To learn more about what value components or incentives are being offered to pet owners, we asked...

“What forms of incentives have been offered in the past?”



Figure 6: 40% of respondents offer discounts or rewards programs and 58% provide a Free Ride Home Program.

In communities that offer little value directly to licensees, we have found that the relationship between the PLO and the pet owner is often limited to renewal letters and payment transactions. To understand the perceived PLO – pet owner relationship better, we wondered...

What we heard...

How would increased compliance affect you?

"Better relationship and communications with citizens, able to give health benefit info on why rabies is required. Better for the pets."

- Pet Licensing Manager, North Carolina

"How do you feel about your PLO's relationship with the pet owner community?"

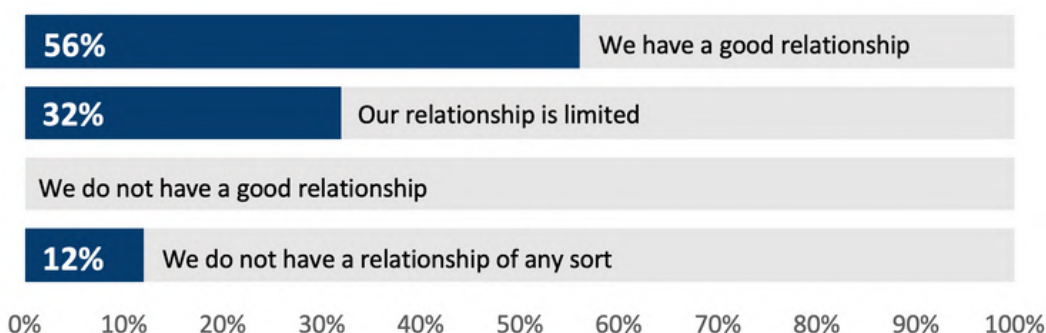


Figure 7: 56% of respondents feel they have a good relationship with the pet owners in their community, whereas 44% have a limited or non-existent relationship.

Communication and Enforcement

We know that so many pet owners don't even know what a license is, never mind that it's mandatory and provides value to them and their community. We studied what methods PLOs are using to increase program awareness, improve renewal rates, and enforce compliance among expired licensees.

"Which strategies have you pursued to increase pet license sales?"

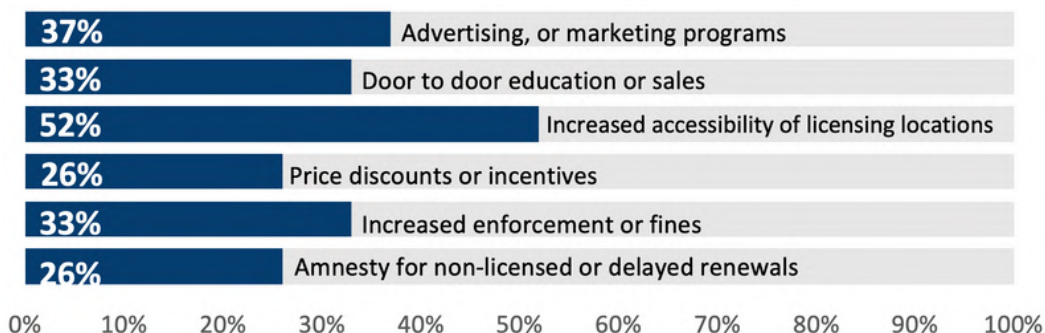


Figure 8: Increasing license sales locations leads the pack, but many PLOs are also running advertising programs, canvassing the community, or offering pricing incentives to help drive first-time license sales.

We often find that PLOs do not communicate frequently with their pet-owning licensees. So we asked...

“Which communication means do you believe are VITAL?”

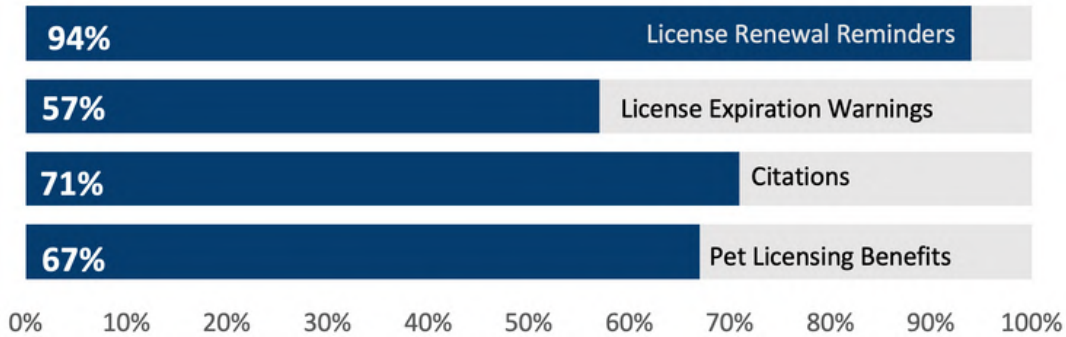


Figure 9: Respondents feel that renewal reminders and citations for non-compliance are the most vital to them. Only 67% felt that explaining pet licensing benefits were vital.

“Which communication means do you send to pet owners?”

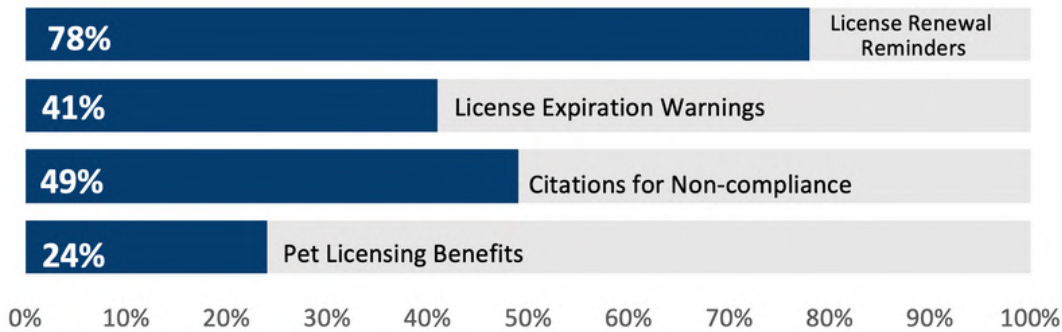


Figure 10: Even though 94% of respondents feel license renewal reminders are vital, just 78% are actually sending them to licensees each year. Less than 50% of PLOs in our survey are sending expiration warnings and citations, and just 24% are taking the time to communicate the value of licensing to pet owners.

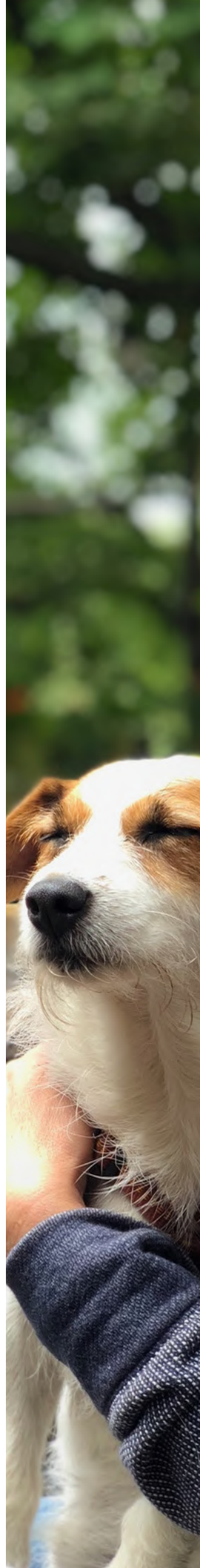
With a better understanding of which communication means are deemed vital to PLOs, and given that, despite their importance, not all are sending these communications, we wondered if resource scarcity is leading to less communication than is deemed critical.

What we heard...

How would increased compliance affect you?

"More revenue coming in, so more money to be used for animal welfare."

- Pet Licensing Manager, Kentucky



“Do you have the resources to implement vital communications?”

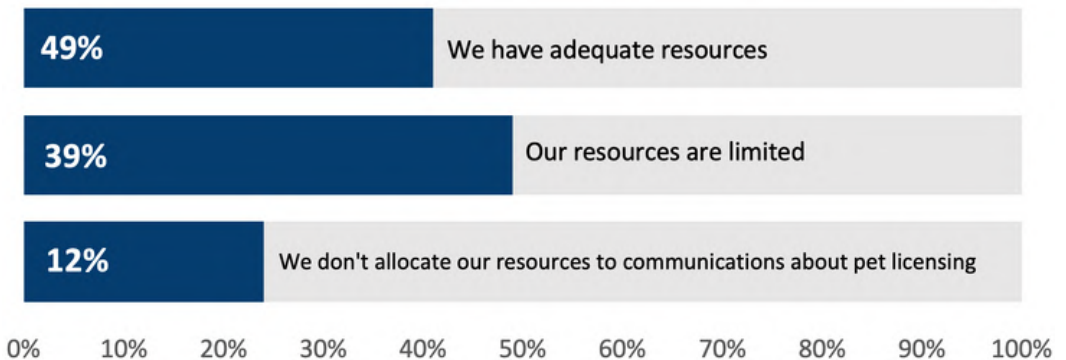


Figure 11: Less than half of respondents felt they had adequate resources to send even the vital communications to current and potential licensees.

What we heard...

How would increased compliance affect you?

"It helps to fund the cost of animal services in the field and shelter operations. We have a life savings rate of 92-94% which is achieved through quality care and business practices funded in part by pet license fees."

- Pet Licensing Manager, Washington

Often we hear that some communities take a more relaxed approach to pet license enforcement. In other cases, lack of compliance is considered “unlawful” and greater efforts are made to ensure that pet owners comply. To learn more about this, we asked...

“Are licensing laws actively enforced in your community?”



Figure 12: Less than half of respondents stated that they enforce licensing laws proactively, with another 41% enforcing laws only when in the field or on a call.

Convenience

28% of respondents indicated that they believe pet owners were not licensing their pets due to a lack of convenience. With this in mind, what are PLOs doing to make registration easier for their residents?

“Where can pet licenses be purchased in your community?”

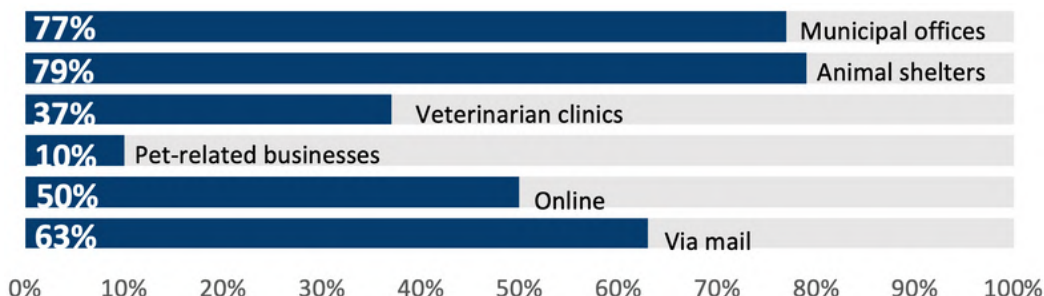


Figure 13: Respondents indicated that several options are likely to be available, with more than half offering municipal offices, animal shelters, mail-in and online registration options.

When we conducted secondary research of more than 600 PLOs, we found that just 40% offered online registration, 10% less than found in the survey response population.

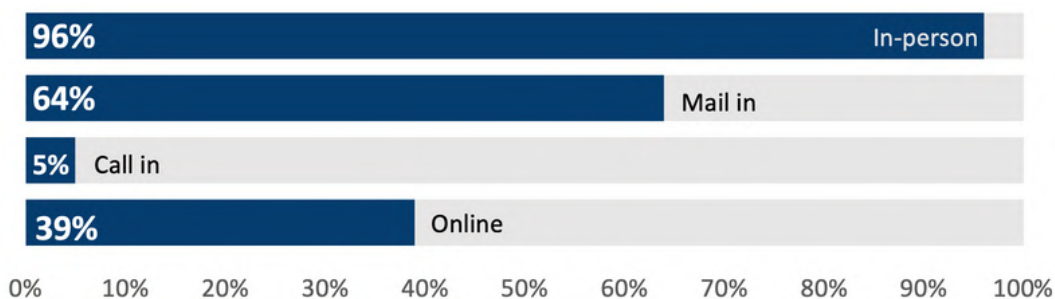


Figure 14: Secondary research suggests that just under 40% of PLOs offer online registration, and fewer than 5% take registration orders over the phone. Online licensing increased by 9.10% from last year's research.



Did You Know: In a 2014 study, when asked, “How important is it for governments to provide more services through digital channels?”, over 75% of respondents thought it was either fairly or very important to them.



Many PLOs partner with local veterinarians who sell licenses, submit rabies vaccination certificates, and otherwise promote pet licensing. How prominent is this?

“How would you describe your relationship with local veterinarians as it relates to pet licensing?”

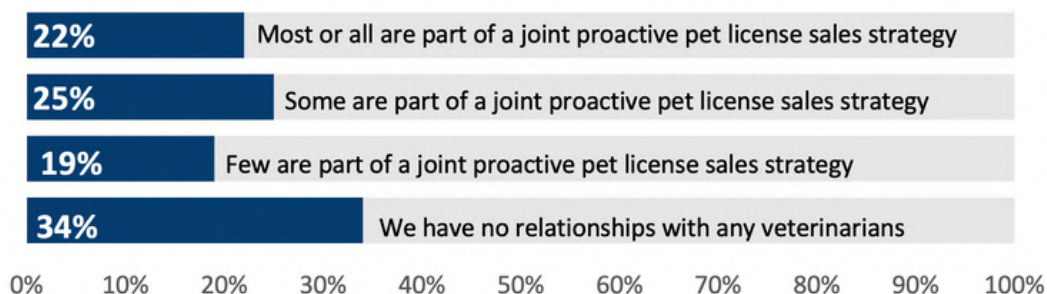


Figure 15: More than 65% of respondents have some relationship with local veterinary clinics. Nearly 22% state that most or all local clinics are part of a joint proactive strategy.

What we heard...

How would increased compliance affect you?

"Pet licensing compliance means rabies compliance and responsible ownership, which improves safety for the community at large. Also, the revenue generated is vital to our operations."

- Pet Licensing Manager, California

“Do you believe this relationship has helped increase compliance?”

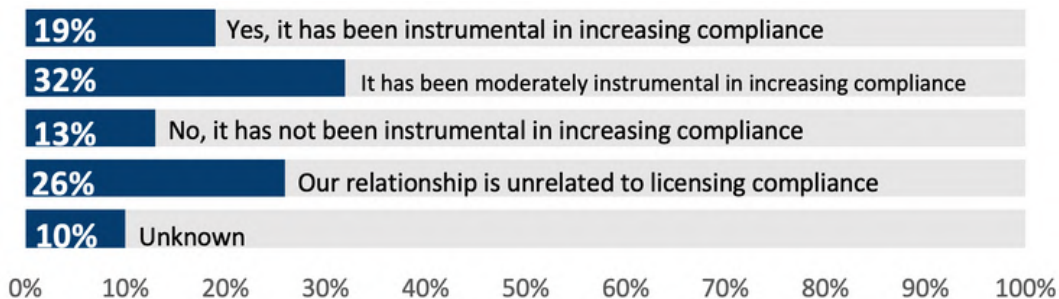


Figure 16: Nearly 20% of PLOs believe veterinary clinic participation has been instrumental in increasing compliance, and 32% believe it has been moderately helpful. Almost 13% state that their relationship with vet clinics has not been instrumental in license sales.

Pricing and Policies

We have yet to see two jurisdictions in North America with the same pricing and policies for pet licensing. Some have nominal fees, some much higher. Some have simple pricing structures, others are more complex. Some require proof of rabies certifications or spay/neuter surgeries, but many accept check-box style attestations only. We wanted to see where PLOs stood on these pricing and policy decisions.

Pricing

Pricing can vary dramatically from county to county, but generally we see pricing increase as we travel westward across the continent. Interestingly, we do not see compliance increase as license fees decrease. In fact, in last year's report we learned that the highest performing programs had, on average, 29.2% higher fees.

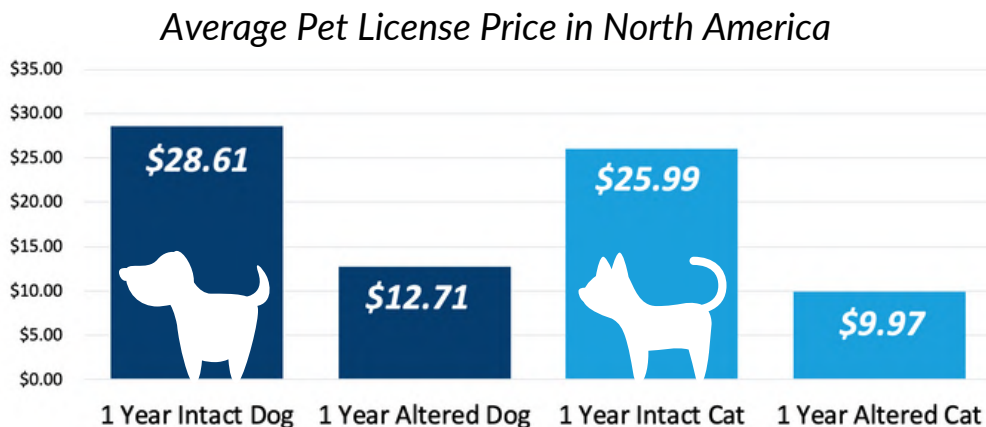


Figure 17: Using data from more than 600 PLOs we calculated the average altered dog license to be \$12.71 and intact dog license to cost \$28.61. Cat licenses were slightly lower in general. In comparison to last year, we found intact dog licenses have increased by 6.52%, and altered dogs license fees have increased by 3.92%.

“Do you feel your fees should increase, decrease or remain the same?”

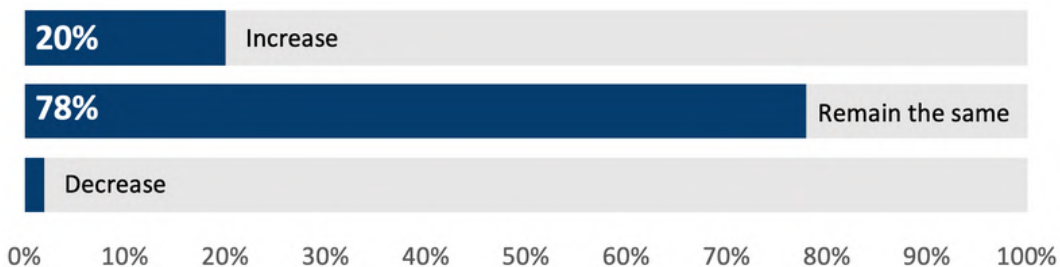


Figure 18: Respondents seemed to feel, by and large, that their fees should remain the same. 20% felt they should increase.

We wondered if the reason license fees are low is due to the political climate or concern for negative public reaction, so we asked...

“Do you believe your current environment would be receptive to price changes?”

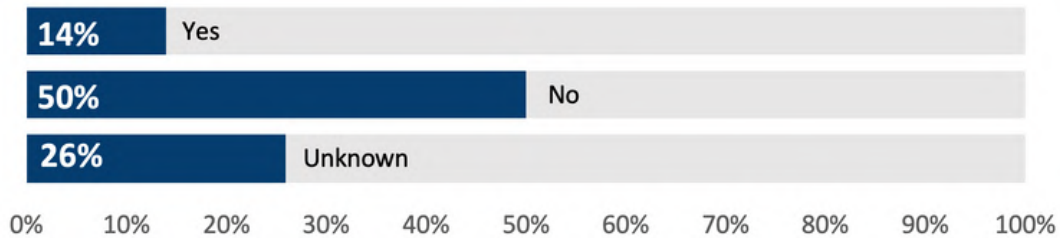


Figure 19: Only 14% of respondents felt that changing prices would be well received in their current political environment. 10% selected "other".

Policies

While 90% of North Americans are required to license dogs, many jurisdictions also require that cats be registered too.

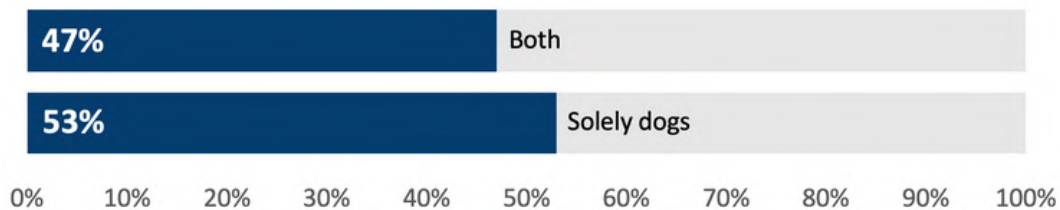


Figure 20: 47% of the more than 600 studied PLOs require that cats be licensed, down 4.3% from 2018's analysis.

In many places, one of the primary reasons pet licenses are required at all is to help ensure that pets are vaccinated against rabies. In fact, our study showed that more than 78% of PLOs require the submission of current rabies vaccination certificates in order to license a pet. It's also common to find jurisdictions that require veterinary clinics to submit rabies vaccination certificates to local animal control organizations. How prevalent is this practice?

“Are vet clinics required to send vaccination records to you?”

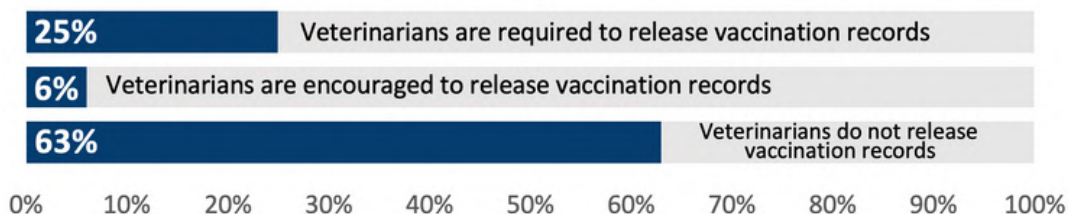


Figure 21: More than 62% of survey respondents stated that veterinary clinics have little or no direction regarding the provision of vaccination records. 6% selected "other".

The Case for Cat Licensing

The intake rate of cats to a shelter is typically

2X

that of dogs, although cat return rates are typically less than a sixth of the return rates for dogs.

To help manage the cat population, and to increase funding, **50%** of communities in North America require that cats be licensed.
Why not more?

First, why cat licensing? Our perspective is that cats account for a large portion of the animal care and control burden faced by local communities and shelters. So why shouldn't efforts be made to register cats, divert more of them from animals shelters, and increase stray cat care and control funding at the same time?

'We've tried licensing cats before. It didn't work.' We hear this all the time, but recently had the opportunity to work with the City of Guelph which decided to roll out a new mandatory cat licensing program. We thought we would share our results.

Guelph's cat control problem in 2015 was very similar to what many communities are currently experiencing. They had a continuously increasing trend of cat intakes to the local shelter, yet a return to owner rate of just 13%.

In our first year of launching the mandatory cat licensing program, nearly 4,000 cat licences were issued in the city, capturing 13% of the local cat population. Considering that the North American cat licensing compliance average is around 7%, achieving 13% in the first year of the program represents a monumental success.

We achieved these results with a proactive awareness program that explained the value of cat licenses. We ensured that the program had value for cat owners, and that they were informed about the challenges the community was facing with feral and lost cats.

These new licensees create a meaningful new revenue source which can be put toward further efforts to increase cat welfare and other animal welfare programs.



higher return rates



reduced feral cat population



increased funding

Systems & Efficiencies

County by county and city by city, pet licensing programs have been run autonomously – with often very different pricing, policies and practices found even in neighboring communities. This autonomy has required each PLO to adopt their own systems and procedures to manage communications, data tracking, financial transactions, customer service, and distribution. We wanted to learn how these programs are being managed.

“How well is your program running operationally?”

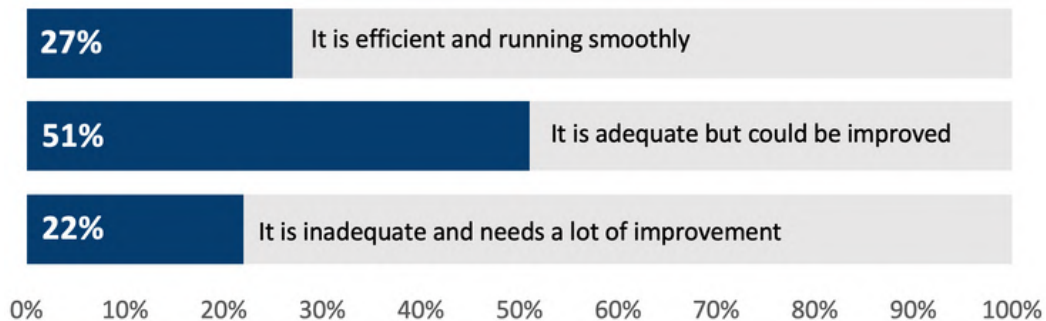


Figure 22: Just under 27% of respondents stated their programs were efficient and running smoothly.

What we heard...

How would increased compliance affect you?

"It does very little due to lack of compliance. It would be advantageous to add cat licensing and to also have licensing purchases online."

- Pet Licensing Manager, Ontario

“Do you have an effective system for managing your license data?”

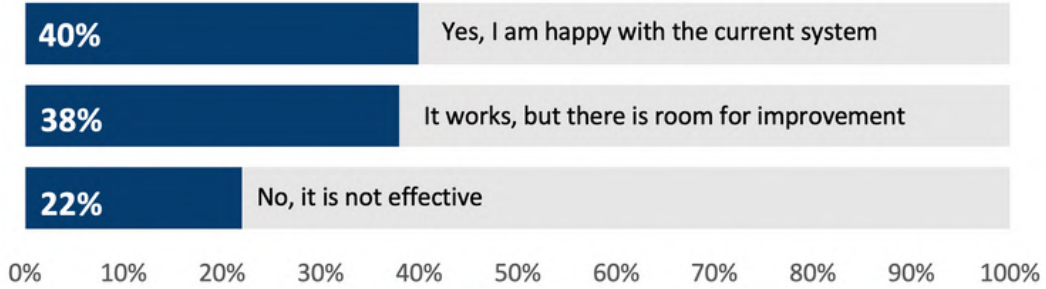


Figure 23: 60% of PLO respondents state that they have a sub-optimal system for managing pet license data.

What we heard...

How would increased compliance affect you?

*"It doesn't impact it yet, because our program is stagnant and outdated."
- Pet Licensing Manager, North Carolina*

“How does your organization send license renewal reminders?”

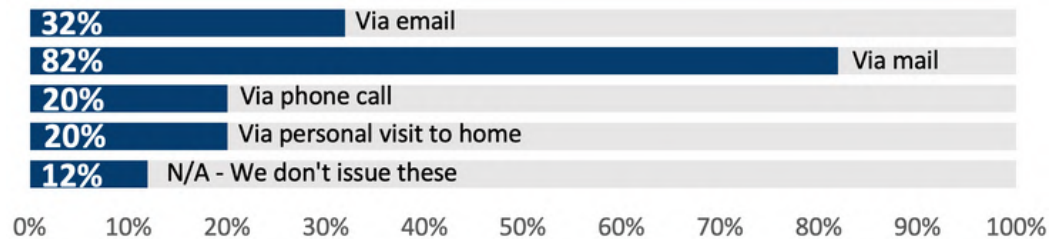


Figure 24: Just 32% of respondents stated that they use email to send license renewal reminders.

“Where is the majority of your staff time being spent?”

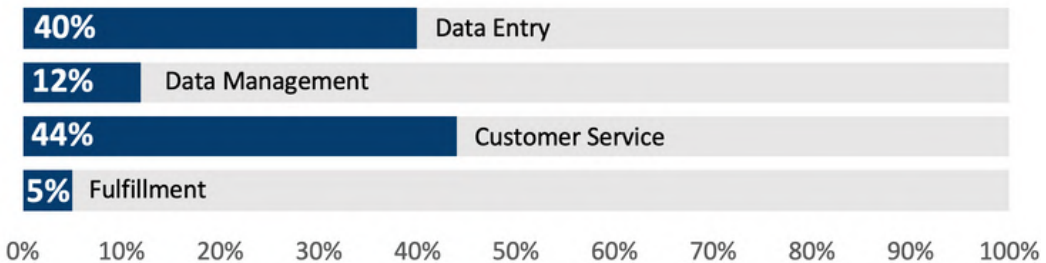


Figure 25: The majority of staff time is spent interacting with pet owners and entering data.



DocuPet's Solution

Fewer than **13%** of pet owners license their animals with local jurisdictions. DocuPet was founded to increase pet license sales, decrease administrative workload, and build programs that reduce shelter stays and overall intake numbers.

By providing pet owners with *better* pet tags, a *free* lost pet service, *incentives*, and lots of information about *pet care* in their community, we make pet license registration as valuable to them as it is to local animal welfare.

With...

- ✓ Awareness Campaigns
- ✓ Personalized and Designer Pet Tags
- ✓ Robust Renewal Communications
- ✓ Educational License Packages
- ✓ Advanced Reporting for Partners
- ✓ Customer Service by Phone, Email and Chat
- ✓ A Free Lost Pet Program, with 24/7 Hotline
- ✓ Zero Startup or Monthly Fees - & Lowest Fee Per Registration



DocuPet's Experience

from a pet licensing manager's perspective

"The City of Boulder's experience with DocuPet has been positive to say the very least. The DocuPet team is very organized, responsive and fun to work with. They immediately established a timeline and systematic process, including weekly launch meetings. This helped keep things moving forward and addressed specific milestones. When and if I had questions or concerns, they assisted me immediately. They are a pleasure to work with."

*- Janeé Boswell, Animal Control Supervisor
City of Boulder*

"DocuPet has brought a significant increase in dog license sales, their software is terrific, and lost dogs are getting home more often. Their people have given us hands-on training and support, and their customer service team handles all of the email and phone inquiries. We are so pleased to have them providing an innovative solution to our residents. I'll also say that the positive news coverage has been welcomed!"

*- John Copanas, City Clerk
City of Syracuse*

"Partnership with DocuPet has allowed us to offer an accessible licensing service to our pet owners as well as simple, easy to use tools for our field officers and shelter partners. Pet owners receive lost pet services and cash rewards, our staff save hundreds of hours each year and the massive increase in license sales has provided us with much needed revenue to enhance our animal welfare services."

*- Doug Godfrey, GM - Operations Department
City of Guelph*

Further Data

We compiled data on over 600 pet licensing programs to obtain regional averages regarding a variety of program attributes. We believe this data to be useful for PLOs assessing how their program compares to national and state/provincial averages.

Average Dog License Price Data

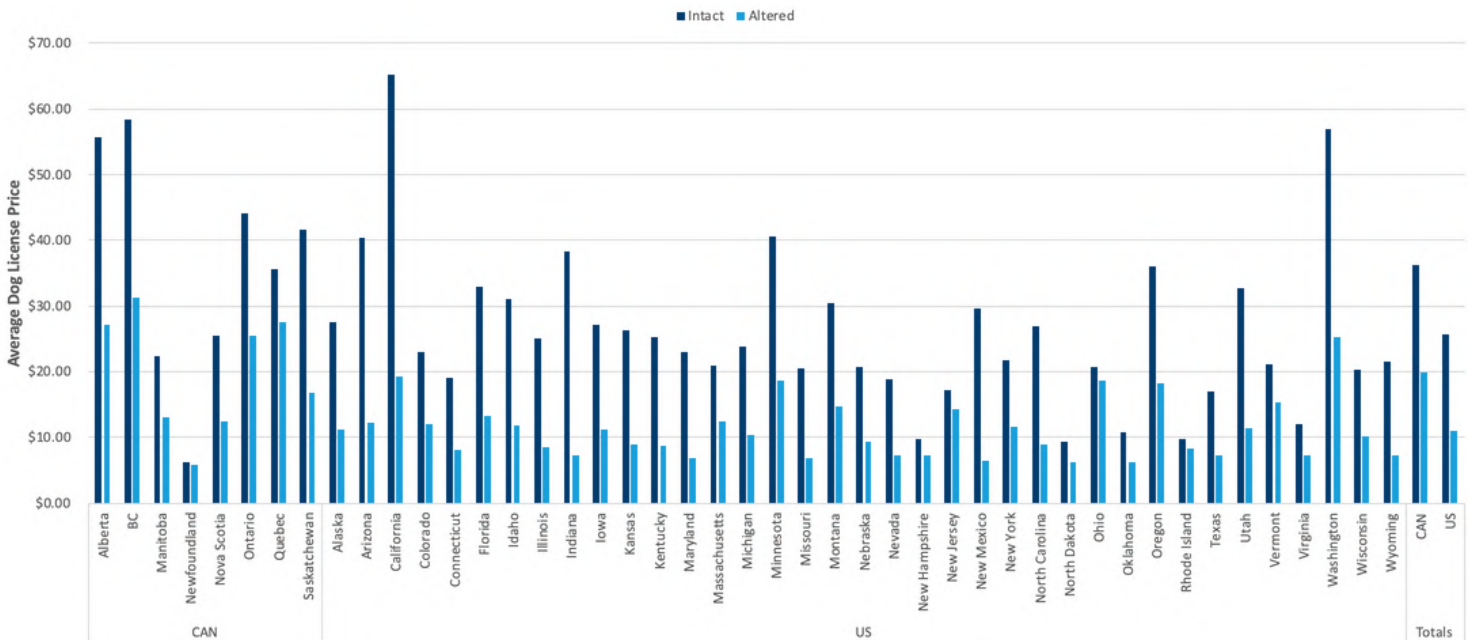


Figure 26. Average dog license prices for states/provinces for which data was obtained for at least 10 pet licensing programs. Generally, pet license prices are higher in the western states and provinces of North America.

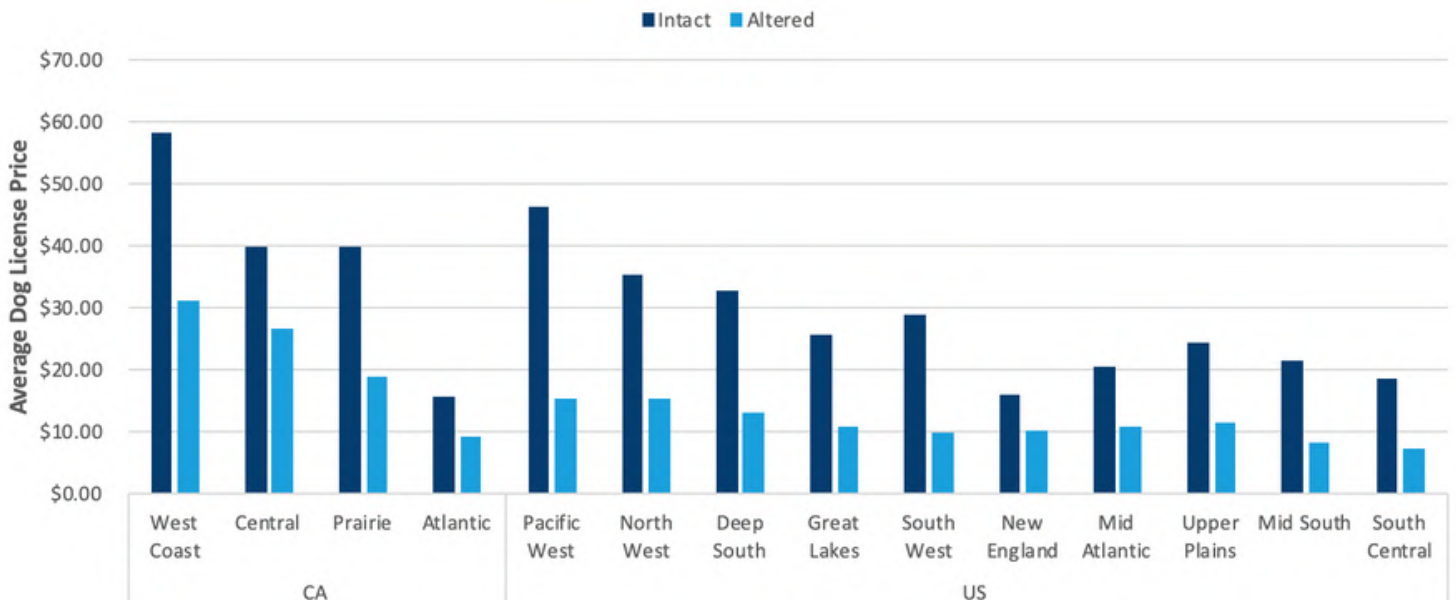
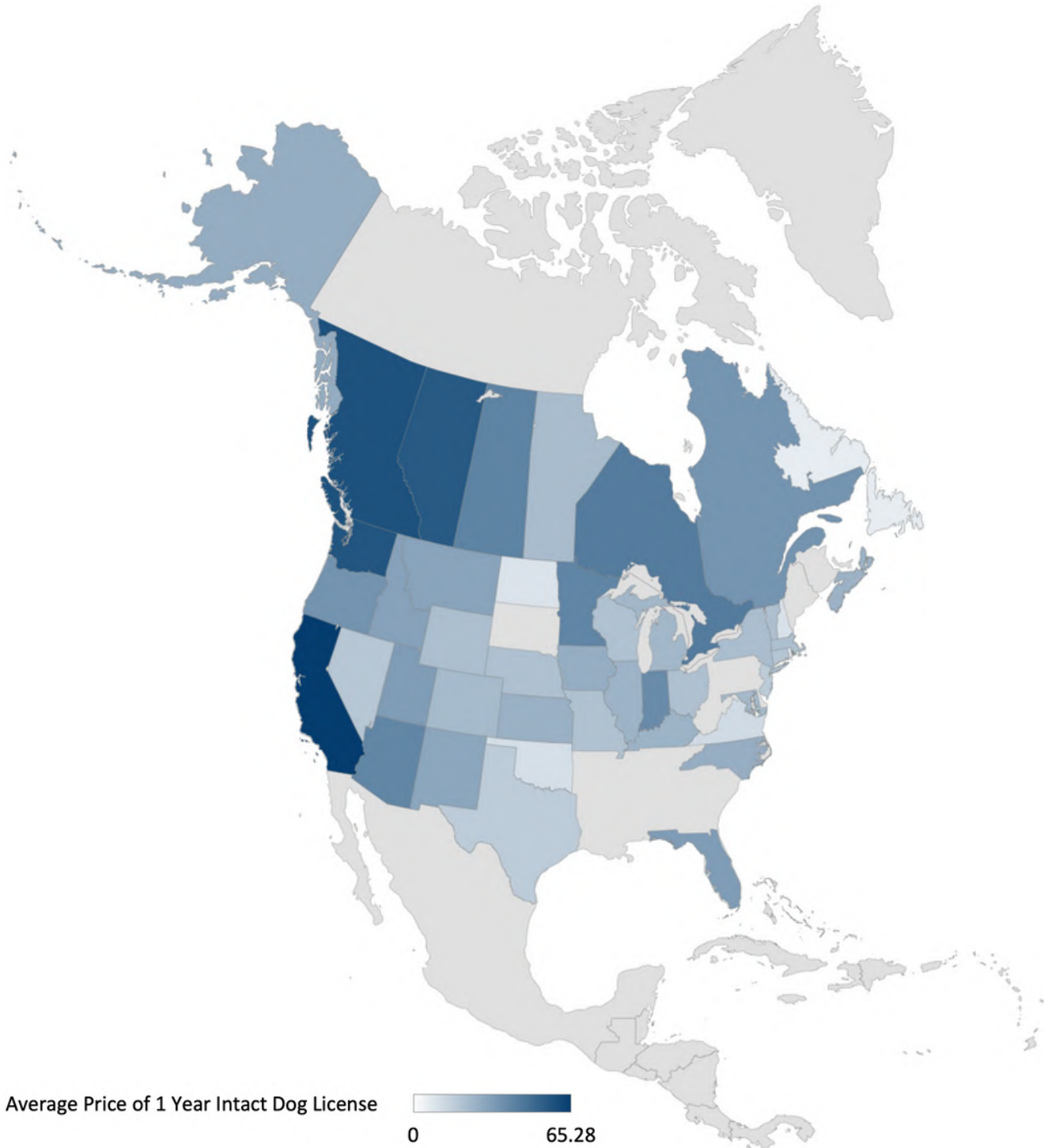


Figure 27. Average dog license price by region.

Figure 28. Average intact dog license prices by region represented on a map of North America.



Online Licensing Frequency

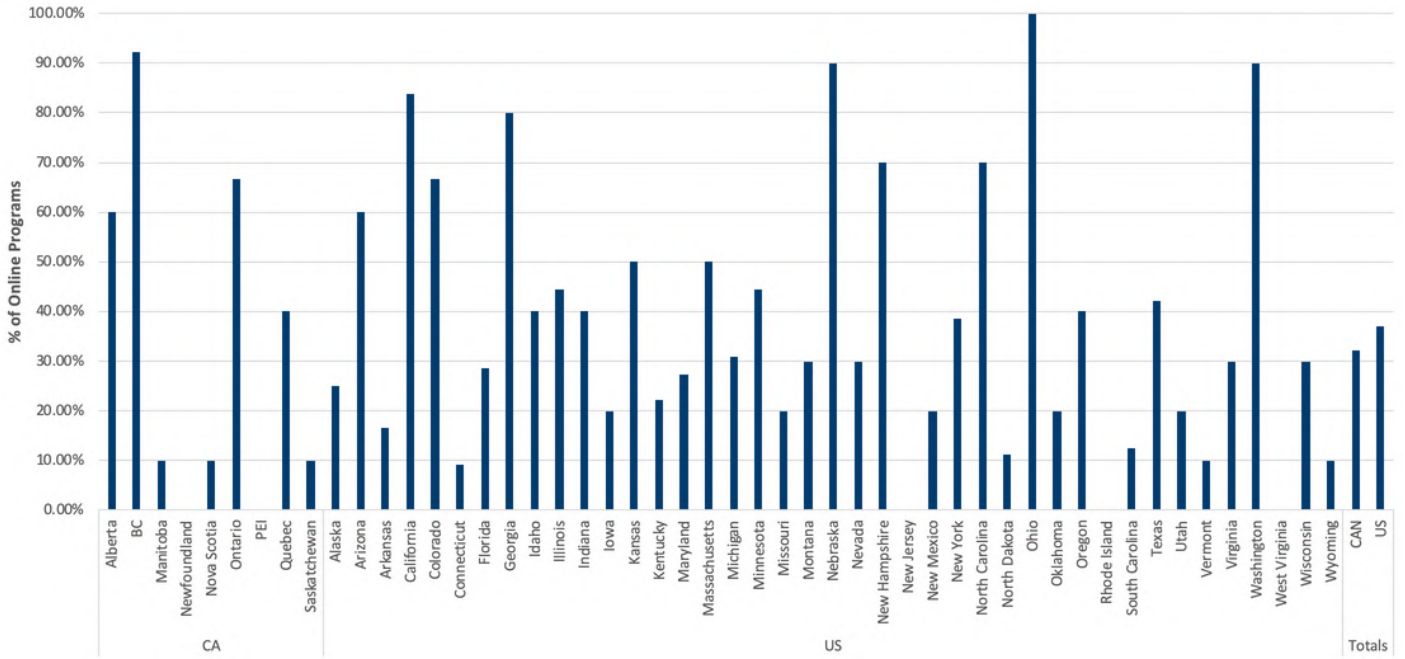


Figure 29. Frequency of online licensing by state/province for which data was obtained for at least 10 pet licensing programs

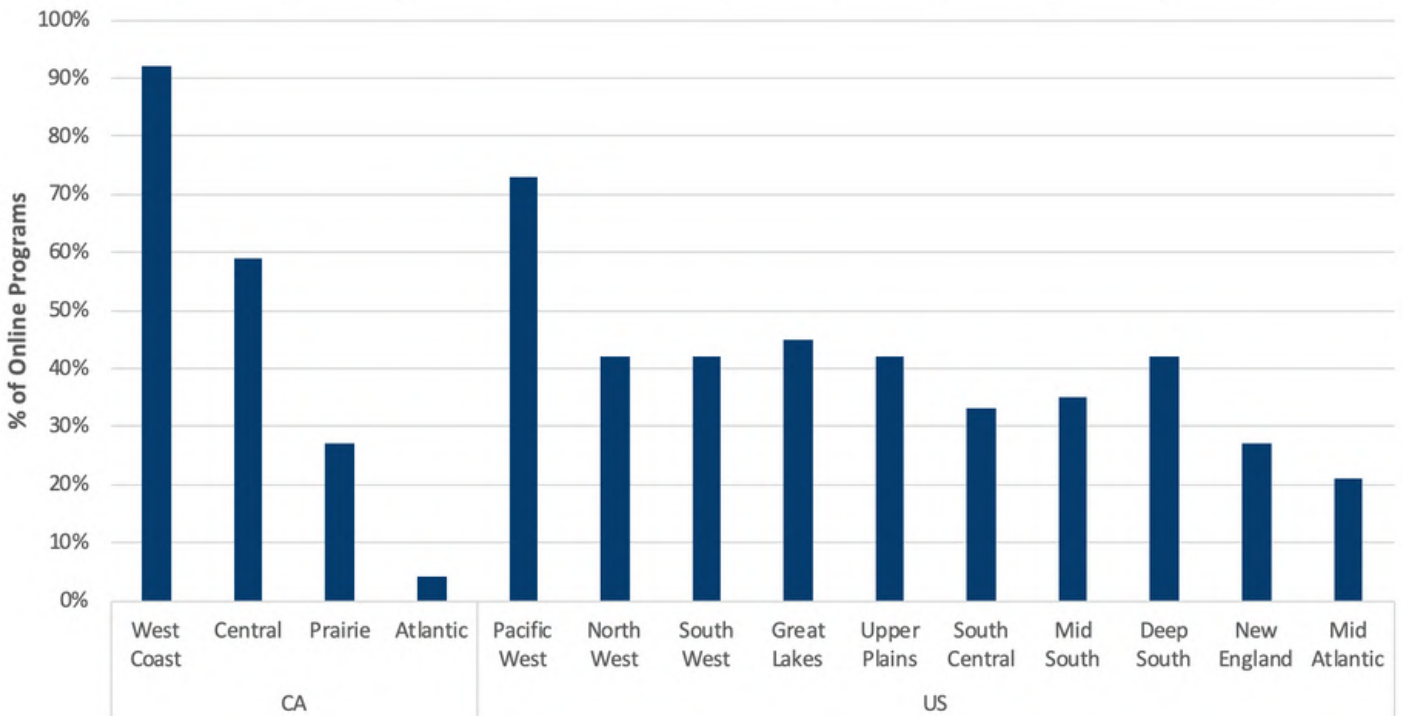


Figure 30. Frequency of online licensing by region. Online licensing is offered most in the western states and provinces of North America, and less so in the south and east.

Types of Pets Licensed

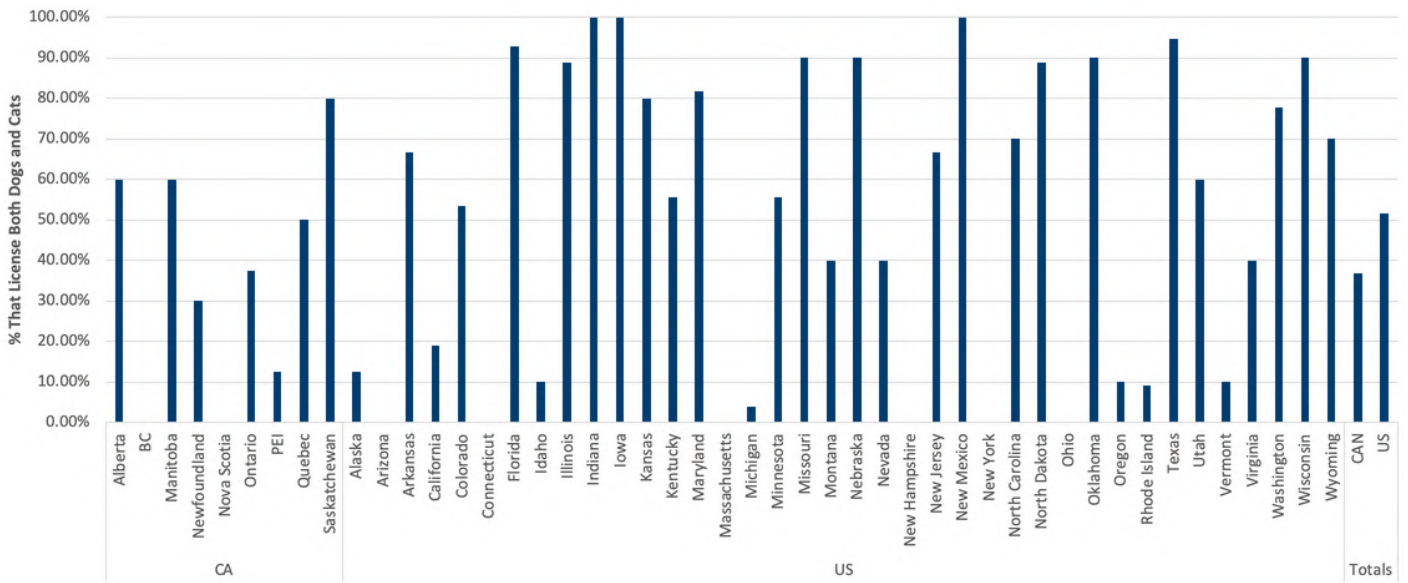


Figure 31. Percentage of researched PLOs that license both cats and dogs by state/province, for which data was obtained for at least 10 pet licensing programs per region. A 100% signifies that every PLO in the state/province licenses both cats and dogs, while a 0% signifies that every PLO in the state/province licenses solely dogs.



DocuPet[®]

A Safe and Happy Home for every pet

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