

The image is a composite graphic. In the background, there is a photograph of a woman with long, wavy brown hair smiling warmly. Overlaid on this is a photograph of a black dog with its mouth open, appearing happy. The text 'ANNUAL RESEARCH REPORT 2018' is written in large, bold, white, sans-serif capital letters across the center. The text is semi-transparent, allowing the underlying images of the woman and the dog to be visible through the letters. The overall composition is clean and professional, suggesting a focus on pet-related research and industry trends.

ANNUAL RESEARCH REPORT 2018

Pet Licensing In North America

Executive Summary

Pet licensing is a practice that gained widespread popularity in North America in the 1950s, helping to ensure that the practical concerns associated with having animals closely integrated within our communities were overcome. The main functions of pet licensing are to return pets to their owners, control the population of feral animals, mitigate the spread of zoonotic diseases, and subsidize the cost of animal services. All of these functions make pet licensing crucial to animal control and welfare.

Despite this, and there being over a 90% occurrence of a licensing ordinance or by-law in U.S. and Canadian jurisdictions, the average North American pet licensing compliance rate is sitting at a meager 13%. The poor state of pet licensing in North America demands a report that summarizes pet licensing standards, explores trends, identifies patterns, and establishes commonalities of successful programs. This report aims to replace anecdotal, notional knowledge about pet licensing with concrete, actionable intelligence that can be used to improve the condition of pet licensing programs of all types.

The findings in this report are based on three main data sources:

1. A comprehensive pet licensing survey commissioned by an independent market research firm that was sent to municipalities of varying demography,
2. Our own primary research including over 100 municipal consultations with pet licensing organisations (PLOs),
3. Online data collected on over 600 PLOs verified for reliability.

From our comprehensive survey, we found that pet licensing is regarded as highly important to the vast majority of municipalities polled, independent of municipality size. The respondents were asked to rank in order of importance the reason for having a pet licensing program. 62% of respondents cited Pet Identification and Welfare as the most important reason for licensing, with all other reasons having comparatively low response rates.

Despite PLOs inherently knowing and acknowledging that pet licensing is important for animal welfare, the vast majority of pet licensing programs see less than 20% of the pets in their community licensed each year. We found that the majority of PLOs viewed their programs as not running efficiently and smoothly (76%), and that they are experiencing stagnant or decreasing pet license sales (62%).

The reason for pet licensing programs being viewed as important, but not generally in a healthy state, is that low pet licensing compliance is a multifaceted issue that requires comprehensive planning and management to achieve meaningful improvements. We compared healthy (>20% compliance) and unhealthy (<20% compliance) programs to confirm that low compliance is a multifaceted issue, and to establish common practices that healthy programs employ. We found six attributes that more commonly occur in healthy programs than unhealthy programs:

1. Awareness Campaigns
2. Renewal Notices
3. Multiple Licensing Methods
4. Online Licensing
5. Tangible Incentives
6. Active Enforcement and Citations

The reason that these six attributes contribute to improved pet licensing program health is that each of them addresses one of the four pillars of pet licensing: Awareness, Convenience, Incentives, and Enforcement. Missing just one of the four pillars is enough to make a program underperform, and that is why a comprehensive strategy, such as incorporating the six attributes listed above, is needed to improve the health of a pet licensing program.

We found that license price does not affect compliance rates by quantifying the difference in license price between healthy and unhealthy programs. Healthy programs were found to have higher license prices for both intact and altered dog licenses, with the average altered dog license price being 30% greater in healthy programs than unhealthy programs.

We have established that pet licensing compliance has benefits to pet welfare, and that a healthy program requires a comprehensive plan, but at what cost does a comprehensive program come to the PLO? We found that pet licensing is a unique service in that obtaining the social benefits actually comes at a financial gain to the organisation responsible for it. By comparing the net revenue per license generated with compliance rate for 70 PLOs, we established that on average a 1% increase in compliance increases net revenue per license by \$0.47. With the financial breakeven point found to be at roughly 3% pet licensing compliance, this means that as a PLO increases compliance the net revenue the PLO generates from pet licensing will increase simultaneously. The reason for this observed trend can be attributed to economies of scale and program efficiency.

Pet licensing is a practice that is crucial for animal welfare, with PLOs regarding it as highly important for this reason. Despite this, it is not being implemented effectively in the majority of municipalities because low compliance is a multifaceted issue that requires a comprehensive program plan to overcome. Although developing an extensive plan may seem daunting, implementing such a plan will both promote animal welfare and provide financial benefits to the PLO.

This report thoroughly details the analytical methods that were used to draw the aforementioned conclusions about pet licensing, provides valuable insights to PLOs on improving the state of their pet licensing program, and displays regional averages pertaining to various aspects of pet licensing programs.

Table of Contents

- 1. Introduction to Pet Licensing 1
- 2. Pet Licensing Regarded As Important. Why? 3
- 3. The Majority of Programs are Unhealthy 5
- 4. Low Compliance is a Multifaceted Issue..... 7
- 5. Healthy Programs are Extensive 8
 - 5.1 Contrasting Healthy and Unhealthy Program Attributes8
 - Awareness Campaigns8
 - Renewal Notices9
 - License Purchasing Methods9
 - Online Purchasing9
 - Citations and Active Enforcement9
 - Offering Incentives9
 - 5.2 The Effect of License Price (Dogs) 10
- 6. Higher Compliance Provides Financial Benefit 11
- 7. Summary 13
- 8. Further Data 14
 - 8.1 Average Dog License Price Data 14
 - 8.2 Online Licensing Frequency 16
 - 8.3 Types of Pets Licensed 17
- 9. About the Study 18

1. Introduction to Pet Licensing

Pet licensing is a practice that dates back centuries, with it gaining widespread popularity in North America in the 1950s. Ever since cats and dogs have been society's most popular companions, pet licensing has operated alongside this trend, helping to ensure that the practical concerns associated with having animals integrated within our communities are overcome.



What is a PLO?

PLO stands for Pet Licensing Organization. A PLO is the administrative or government entity that is in charge of pet licensing in a given municipal jurisdiction, such as a county, city, or town. More specifically, this PLO is typically a department within the municipal government, the local animal shelter, or the contracted Humane Society.

Pet licensing is the registration of a pet with the appointed Pet Licensing Organization (hereafter, PLO). Registration is normally accompanied by issuing the pet a unique identification tag. This tag is used for reunification purposes (to connect the lost pet with its owner) as well as enforcement purposes (to verify that a license or registration is up to date).

Pet licensing serves a variety of purposes that help ensure animal control and welfare. Primarily, it is used as a means of increasing the likelihood of returning lost pets to their owners, controlling the population of feral animals, mitigating the spread of rabies and other animal related viruses, and subsidizing the costs associated

with animal services that coordinate all of the above. With that, a summary of the current views, trends, and performance of PLOs is paramount to understanding the health of animal control and welfare within North American communities.

Pet licensing is crucial to animal control and welfare, and despite there being over a 90% occurrence of a licensing ordinance or by-law in U.S. and Canadian jurisdictions, most pet licensing programs are underperforming. The average dog license compliance rate in North America sits at 23%, making the benefits of pet licensing only partially realized in the majority of municipalities. Although municipalities recognize the need for healthy pet licensing programs, it is inherently difficult to improve a program without knowledge of what makes a program healthy in the first place.

Additionally, the organizations responsible for pet licensing programs are often heavily burdened with animal services and/or concurrent ordinances that demand urgent attention. The result is important aspects of the pet licensing program being neglected, and thus pet licensing programs persistently and perpetually underperforming. It is this recurring theme that has motivated us to formulate a first of its kind annual research report which addresses the common need for pet licensing knowledge, trends, patterns, best practices, and regional standards.

The findings in this report are based on three main data sources:

1. A comprehensive pet licensing survey commissioned by an independent market research firm that was sent to municipalities of varying demography,
2. Our own primary research including over 100

municipal consultations with PLOs,
3. Online data verified for reliability.

The pet licensing survey received 40 complete and 24 partially complete responses from municipalities, animal shelters, and Humane Societies responsible for pet licensing in jurisdictions varying in geography and population, from several thousand to several million.

This was supplemented with data collected from our direct consultations with 30 additional PLOs, as well as further qualitative data from an additional 70 PLOs.

Lastly, a thorough secondary research study was conducted to obtain basic pet licensing program data (e.g. price of license, licensing methods) for more than 600 PLOs. Given the amount of data collected and variety of municipalities involved, we have been able to draw reliable conclusions that are generalizable to pet licensing organizations and programs of all types.

2. Pet Licensing Regarded As Important. Why?

Pet licensing is regarded as highly important to the vast majority of municipalities polled, independent of municipality size. In our first annual survey we asked our respondents to classify the importance of pet licensing. Of the 40 respondents, 78% believe pet licensing to be important or very important to their jurisdiction, with fewer than 10% viewing it as less than moderately important (Figure 1).

How important is the pet licensing program to your jurisdiction or organization?

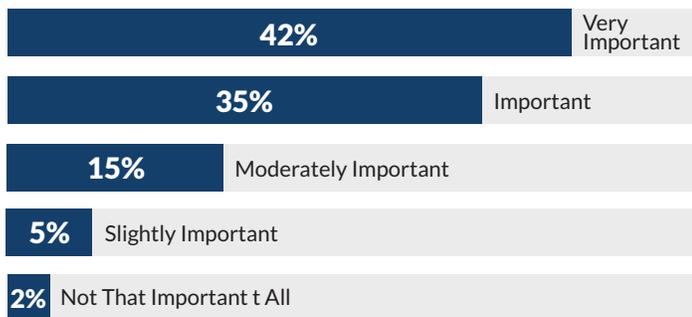


Figure 1. 78% of PLO respondents feel pet licensing programs are important or very important to their jurisdictions.

Respondents were asked to rank in order of importance the reasons for having a pet licensing program. 62% of respondents cited Pet Identification and Welfare as the most important reason for a pet licensing program, with other reasons having an equally low percentage of respondents viewing them as most important (Figure 2). Of the 38% of respondents that didn't rank pet identification and welfare as the most important reason for

pet licensing, the majority viewed it as the second most important reason.

Pet welfare is about ensuring that wanted pets have safe and comfortable living conditions in their owner's homes, and that unwanted pets are both:

1. provided with suitable living conditions by having proper sheltering facilities and adoption services, and
2. mitigated by preventing unplanned breeding.

High performing PLOs aim to promote all aspects of pet welfare.

What is the most important reason to have a pet licensing program?

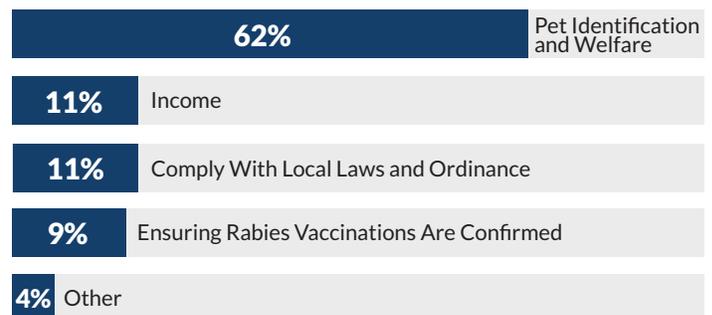


Figure 2. Pet Identification and Welfare was identified as the most important reason by 62% of respondents.

When a pet is lost and goes to the shelter, it is likely that it will never be returned to the owner. The 2015 Cana-

1. https://d3n8a8pro7vhmx.cloudfront.net/cfhs/pages/427/attachments/original/1490812932/shelter_statistics_2015_final_report.pdf?1490812932

dian Federation of Humane Societies report on sheltering statistics showed that average dog and cat return rates from shelters are 69% and 11%, respectively¹. This situation is a lose-lose-lose, with the owner losing its companion, the pet never returning to its original home, and the shelter consuming its limited resources on a wanted pet.

The identification tag issued at the time of licensing allows the owner of a lost pet to be identified and contacted, so that the pet can be returned to the owner with minimal or no time in the shelter.

The revenue generated from pet licensing can, among other things, be used to improve services that promote pet welfare. For example, a larger shelter budget facilitated by a high performing licensing program can allow the sheltering facilities for unwanted pets to be upgraded. Additionally, having a larger budget for animal control benefits both unwanted and wanted pets alike, as it enables faster collection of stray animals, thereby preventing unplanned breeding and the spread of viruses.

Pet licensing aims to discourage and suppress unplanned breeding if differential pricing is employed. It is a common tactic across North America to offer reduced licensing fees for altered pets, as a strategy to incentivize responsible pet ownership.



Did You Know?
Of the 600+ municipalities researched, 80% use differential pricing? The average intact pet license price is 3 times greater than the average altered pet license price.

We frequently encounter cases that prove the positive intentions of pet licensing for pet welfare not only make sense on paper, but are also being realized in practice.

- In Winnipeg, Manitoba, Canada, the number of euthanized dogs dropped 92% from 2008 to 2016, and in the same time period the number of dogs licensed increased by over 50%. The chief

operating officer of Winnipeg's Animal Service Agency believes that pet licensing is a big reason for the decline².

- The City Clerk of Des Moines, Iowa, said that they "receive calls almost every day from people that have found a lost pet and want to get it returned quickly to the owner", and that pet licenses and permits are the easiest way to ensure lost pets are returned to their owners³.
- In Vancouver, British Columbia, Canada, the return rate for dogs is 97%, with the assistant manager of animal services stating that "the best incentive for getting a dog licensed is that you get your dog back when your dog has been lost"⁴. Countless examples can be found that confirm the PLOs most commonly held belief: that pet licensing is important for pet welfare.

² <http://www.cbc.ca/news/canada/manitoba/winnipeg-dogs-euthanized-1.4149373>

³ <http://whotv.com/2017/12/04/des-moines-pet-owners-dont-forget-to-renew-your-pet-license/>

⁴ <http://www.cbc.ca/news/canada/british-columbia/4-reasons-to-license-your-dog-from-the-city-of-vancouver-1.3478997>

3. The Majority of Programs are Unhealthy

Despite PLOs inherently knowing and acknowledging that pet licensing is important for animal welfare, the majority of pet licensing programs see less than 20% of pets in their community licensed each year. We define these programs with compliance of less than 20% as “unhealthy”.

Our survey found that 76% of respondents viewed their programs as not running efficiently and smoothly, and admitted that their programs need improvements (Figure 3).

Operationally, how do you view your pet licensing program?

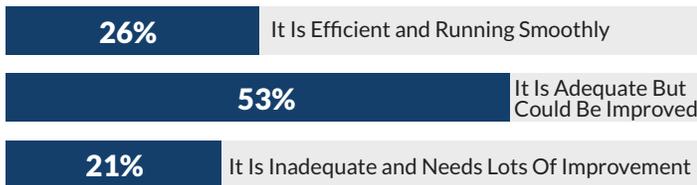


Figure 3. The majority of respondents feel their program needs improvement.

The effect of the large majority of programs not running efficiently and smoothly is that pet licensing compliance rates are low. Of the 70 PLOs reporting (comprised of the 40 complete survey respondents and 30 supplemental organizations for our municipal consultations) the average licensing compliance rate was found to be 13% for the combined dog and cat populations.



What Defines A Healthy Program?

With this study, we define a healthy program as one that is above 20% compliance. Certainly much higher compliance rates are possible and should be sought by all PLOs.

Dog licensing compliance tends to be higher than cats, with licensing rates for dogs averaging 23%. The rate for cats is 7% (Figure 4). This considerable difference between dog and cat licensing compliance can help to explain in part the disparity between dog and cat return rates from shelters and corresponding euthanasia rates.

Average Compliance Rates

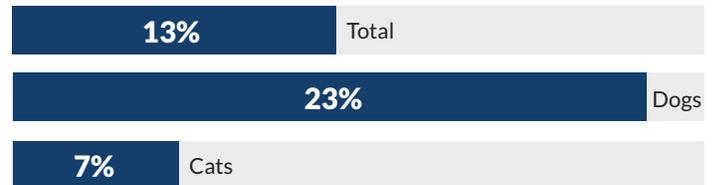


Figure 4. Average pet licensing compliance rates for respondents indicates that, on average, 23% of dogs and 7% of cats are licensed.

The current trend indicates that if pet licensing programs continue to operate in their present fashion, then the majority will continue to underperform for years to come. The majority of our survey respondents (62%) indicated that their municipal pet license sales were either decreasing or stagnant (Figure 5).

Considering the past three years, are your pet licensing sales increasing, decreasing or remaining stagnant?

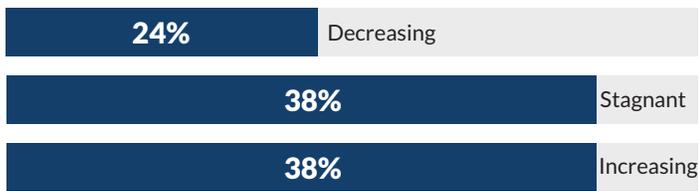


Figure 5. The majority of respondents say their pet license sales are stagnant or decreasing on a yearly basis.

There are two main reasons why a program can be considered important, but not be in a healthy or improving state.

1. Measures to improve the condition of the program have not been taken, although the organization would ideally like to take them.
2. Measures to improve the condition of the program have been taken, but have been largely ineffective.

As it pertains to PLOs, both reasons for the inability to improve the state of an important program are common.

The responsibility of pet licensing in a given jurisdiction usually falls on either the municipal government, the local animal shelter, or the local Humane Society. All three of these organizations are burdened with pressing matters that have more immediate consequences if not attended to than pet licensing, such as overcrowding, citizen interactions, and dogs running at large. Understandably, a program update or improvement project that requires considerable staff time and financing is often relegated to the bottom of a long list of projects and priorities.

Conversely, if an organization is able to implement a pet licensing improvement project, it is typically focused on one or two areas of the program that are perceived as the most likely to obtain short-term improvements. While these improvements often increase license sales (albeit temporarily and marginally), rarely are drastic improvements realized. The reason being, as will be shown in the following sections, is that low licensing compliance is a multifaceted issue that needs to be tackled with a comprehensive approach to obtain tangible and sustainable long-term improvements.



Calculate Your Compliance

In the United States, 37% of households own an average of 1.6 dogs, and 30% of households own an average of 2.1 cats. In Canada, 32% of households own 1.6 dogs, and 37% of households own 1.5 cats.

4. Low Compliance is a Multifaceted Issue

Our survey indicated that PLOs understand that pet licensing is a multifaceted issue. We saw a response rate of no less than 40% for each of the 5 given options as to why residents in their communities don't license their pets. The most frequently cited reason is a lack of awareness of the pet licensing ordinance or by-law, with 78% of respondents citing it (Figure 6).

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

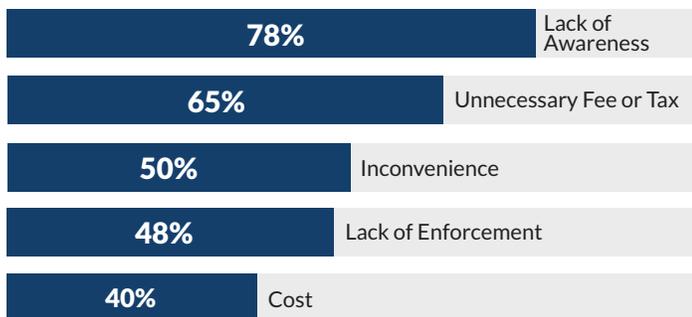


Figure 6. The majority of respondents feel a lack of awareness is the most likely reason for residents to not license their pets.

PLOs know that even if program awareness is high, pet owners are still unlikely to purchase a license if:

- the license is perceived as a burden, with no tangible benefit,
- it is not convenient to license,
- there is no enforcement of the ordinance or by-law.

Awareness, Convenience, Incentives and Enforcement make up the “four pillars” of pet licensing. Missing just one of the four pillars is enough to make a program underperform, and that is why a comprehensive strategy is needed to address each of them.



Cost Does Not Matter

While awareness, convenience, incentive or enforcement can all have a positive or negative effect on compliance, compliance is price agnostic: the cost of a license has no correlation with a municipality's compliance rate.

5. Healthy Programs are Extensive

5.1 Contrasting Healthy and Unhealthy Program Attributes

Perhaps more valuable to PLOs than why the majority of programs are unhealthy, is to know what can realistically be done to improve a program's performance. It is with this in mind that we compared the 70 PLOs for which we had comprehensive program data to determine what differentiates a healthy program from an unhealthy one.

Here we considered healthy programs to have greater than 20% compliance rates, either for the combined dog and cat population, or solely the dog population, depending on if both dogs and cats are licensed in the jurisdiction.

We then compared the frequency of a variety of program attributes between healthy and unhealthy programs, as seen in (Figure 7). It is clear that healthy programs are extensive in their approach to pet licensing, in that - across the board - they tend to have implemented more initiatives that improve the four pillars of pet licensing. Unsurprisingly, there is not one attribute that healthy programs do exclusively that unhealthy programs do not; it is a combination of many attributes and initiatives that makes a program healthy.

Awareness Campaigns

Actively running Awareness Campaigns is the largest factor that differentiates healthy and unhealthy programs, with 83% of healthy programs running some form of awareness campaign. Conversely, only 40% of unhealthy programs actively promote the requirement of pet licensing in their communities. Residents in a given municipality often do not know that a pet li-

Comparing Attributes of Healthy vs. Unhealthy Programs

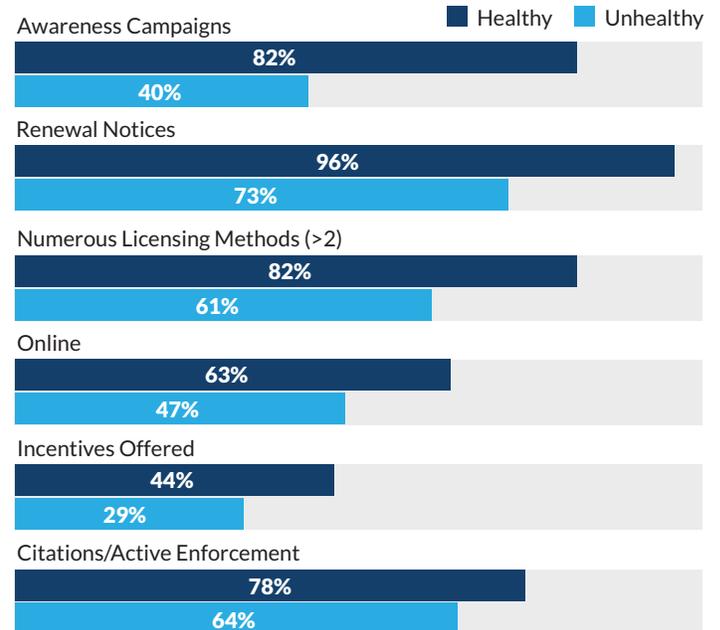


Figure 7. Healthy pet licensing programs are more likely to have active initiatives that drive compliance in each of the "four pillars".



The 6 Commonly Occurring Attributes Of A Healthy Licensing Program

- Awareness Campaigns
- Renewal Notices
- Multiple Purchasing Methods
- Online Licensing
- Tangible Incentives
- Active Enforcement and Citations

censing ordinance or by-law exists in their jurisdiction. When this is the case, any program improvements that don't increase awareness only affect the low portion of residents that are already aware of the ordinance. To generate the highest return on program improvements, it is essential to ensure a high level of program awareness first and foremost.

Awareness campaigns include a wide variety of marketing initiatives, from social media advertising to annual community events to door-to-door sales and/or education campaigns. In our experience, door-to-door campaigns are a cost-effective means of raising program awareness, although other methods may make more sense in certain jurisdictions. For instance, one alternative approach is including educational material on pet licensing in monthly utility bills.

Renewal Notices

The second largest differentiating factor between healthy and unhealthy programs is renewal notices, with 96% of healthy programs issuing renewal notices on an annual basis, compared to only 73% of unhealthy programs. Renewal notices remind known, existing licensed pet owners to renew their licenses several weeks before they are set to expire. Achieving a high renewal rate means that obtaining new pet licensees results in license sales growth, rather than potentially stagnant or decreasing sales as new licensees simply replace unrenewed members of the previous years licensing base.

A large focus should be placed on achieving a high renewal rate, while recognizing that roughly 8-10% of pet licenses are not renewable each year due to pet owners moving out of the jurisdiction and the passing of animals.

License Purchasing Methods

Having numerous purchasing methods is more frequently observed in healthy programs, with 83% of healthy programs having more than 2 purchasing methods for pet owners, versus only 62% of unhealthy programs. This supports the notion that making the process to purchase a pet license convenient, is a pillar of a healthy program.

Even if pet owners are aware of a pet licensing ordinance, if it is a burden to obtain the license, then many won't go through the trouble.

Online Purchasing

More than 60% of the healthy programs studied allowed pet owners to register for pet licenses online, whereas less than half of unhealthy programs offered this purchasing method. This convenience measure is a key factor in driving compliance.



What Are Purchasing Methods?

Licensing methods are the available ways that a pet owner is able to purchase a license for their pet(s) each year. Common methods include:

- *in person counter visits at city hall or the shelter*
- *mailed in forms*
- *veterinary or retail locations*
- *online*

Citations and Active Enforcement

Sending citation letters and/or having active enforcement is commonplace in more than 75% of healthy licensing programs, but found in less than 65% of unhealthy ones. As described below, it is important for pet owners to find value in their pet license, but it is also necessary to enforce the ordinance or by-law to deter pet owners who are aware of the need to license from neglecting their obligation. Just as parking enforcement is required to ensure residents pay to use municipal lots, ordinance officers must be present in the community checking animals for licenses and citation letters must be sent to those who don't renew licenses so that pet owners know they are unlikely to "get away" with non-compliance.

Offering Incentives

Incentives are tangible benefits that a pet owner gets for licensing their pet each year. Examples may include 10% off pet food at a local pet store, or access to an exclusive "Licensed Dogs Only" dog park. By making the personal benefits to pet owners outweigh the cost of purchasing a license, the need for enforcement can be reduced.

Our study showed that healthy programs were nearly

50% more likely to be offering incentives to licensees.

Positive reinforcement for licensing can make pet licensing more accepted in the community. An ideal incentive program is providing compliant pet owners with discounts at local pet stores. This situation is a win-win-win, with the perks of pet licensing outweighing the costs for pet owners, local businesses having cost-effective marketing and increased business, and PLOs not needing to invest as many resources into ordinance or by-law enforcement.

There is an interrelated relationship between all four pillars of pet licensing: awareness, convenience, incentives, and enforcement. Although the majority of PLOs understand that all are important to ensuring high pet licensing compliance, healthy programs do a better job at constructing a comprehensive program that uses the interrelation between the four pillars to drive higher compliance.

5.2 The Effect of License Price (Dogs)

Using the same methodology as above, the average dog license prices were compared between healthy and unhealthy programs. As shown in Table 1 below, healthy programs have considerably higher dog license prices.

	Intact Dog Licence Price	Altered Dog Licence Price
Unhealthy Program Average	\$37.80	\$15.60
Healthy Program Average	\$41.20	\$20.10
% Difference	8.9%	29.2%

Table 1. Comparison of average dog license price between healthy and unhealthy programs.

6. Higher Compliance Provides Financial Benefit

We have established that increasing pet licensing compliance has benefits to pet welfare, but a nagging question remains: at what cost do these benefits come? Typically, obtaining the social benefits of any program comes at a financial loss, but pet licensing deviates from this norm.

We investigated the relationship between compliance rate and the net revenue per license sold for the 70 PLOs for which we have comprehensive data. Net revenue per license sold is the amount of revenue remaining after all direct program expenses have been paid, divided by the total number of licenses sold.

We found that on average for each percentage increase in compliance rate, net revenue per license sold increases by \$0.47. Figure 8 shows the fitted line to the 70 PLO data points that summarizes the relationship between compliance rate and net revenue per license sold. The relationship shows that programs that have low compliance rates are likely to be earning very little, or even losing net revenue per each license sold.

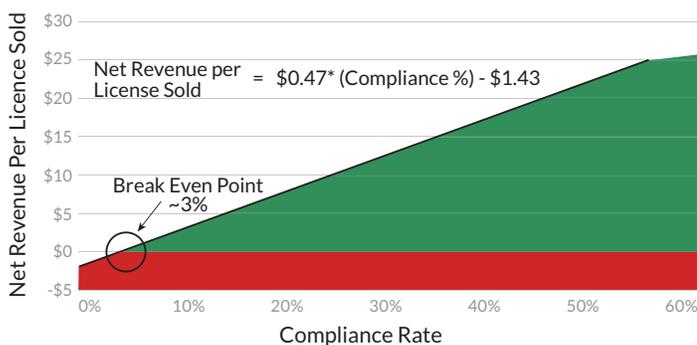


Figure 8. Relationship between compliance rate and net revenue per license sold. Every 1% in compliance rate increase results in \$0.47 in net revenue per license sold.

On the other hand, programs that have high compliance rates tend to earn a large amount of net revenue per license sold, with the average program that has greater than 20% compliance earning above \$8 in net revenue per license.

The reason programs that achieve higher compliance rates tend to earn more net revenue per license sold can be attributed to economies of scale, or “program efficiencies”. To operate any pet licensing program, there are a certain amount of fixed infrastructure costs to get the program started. That is, before the first license is ever sold, there are going to be program implementation costs. Examples of fixed costs can include:

- Hiring a customer service clerk to process in-person license sales,
- Designing and procuring the pet identification tag, or
- Developing and launching an online licensing site.

Once licenses begin selling, these fixed costs don’t increase proportionally with license sales, as the necessary infrastructure is already in place.

Although there are variable costs that increase with each license sold, these are also diminished as processes are put in place to increase program efficiency. Therefore, as more licenses are sold, the fixed costs are distributed over each license sold and the variable costs diminish, until a point is reached where the revenue generated from license sales equals the fixed costs and variable costs, commonly known as the break-even point.

As licenses are sold beyond the break-even point, positive net revenue begins to be generated by the pro-

gram, and the amount of net revenue per license sold continues to increase as more licenses are sold.

Our analysis shows that the average breakeven point is around 3% pet licensing compliance, although with such a wide variety of program types it is not uncommon for programs above this rate to be running a deficit.

While pet control and welfare is the primary reason to strive for a pet licensing program with high compliance, it is encouraging for PLOs that these social and humane benefits are achieved simultaneously with financial benefits.

7. Summary

Pet licensing is a municipal practice that has been in use for as long as pets have been commonplace in our society, ensuring that the practical concerns associated with having animals integrated within our communities are overcome.

Although pet licensing is widely regarded as an important practice for pet welfare, the majority of pet licensing programs are unhealthy and not improving. The reason for pet licensing programs being viewed as important, but not generally in a healthy state, is that low pet licensing compliance is a multifaceted issue that requires comprehensive planning and management to achieve meaningful improvements.

There are four main pillars of a healthy pet licensing program: ordinance or by-law awareness, licensing convenience, incentives to license, and ordinance or by-law enforcement. The interrelation between these four pillars means that if even one is not in a good condition, then it is unlikely for a pet licensing program to be healthy. Unsurprisingly, by investigating the 70 PLOs for which we have comprehensive program information, we found that the attributes of healthy programs are extensive. The healthy programs more frequently ran awareness campaigns, issued renewal notices, had more than two licensing methods, allowed for online licensing, provided licensing incentives, and actively enforced the local licensing ordinance or by-law.

While organizing all of these program attributes may seem daunting for many PLOs, we found that the effort for increasing licensing compliance is not only rewarded by benefits to pet welfare, but also by financial gain that is seen to increase with compliance rate.

We hope that this first of its kind annual research report has presented valuable information to PLOs for

benchmarking, and summarized best practices that will make it easier to establish a plan to improve the health of any pet licensing program.

8. 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.

8.1 Average Dog License Price Data

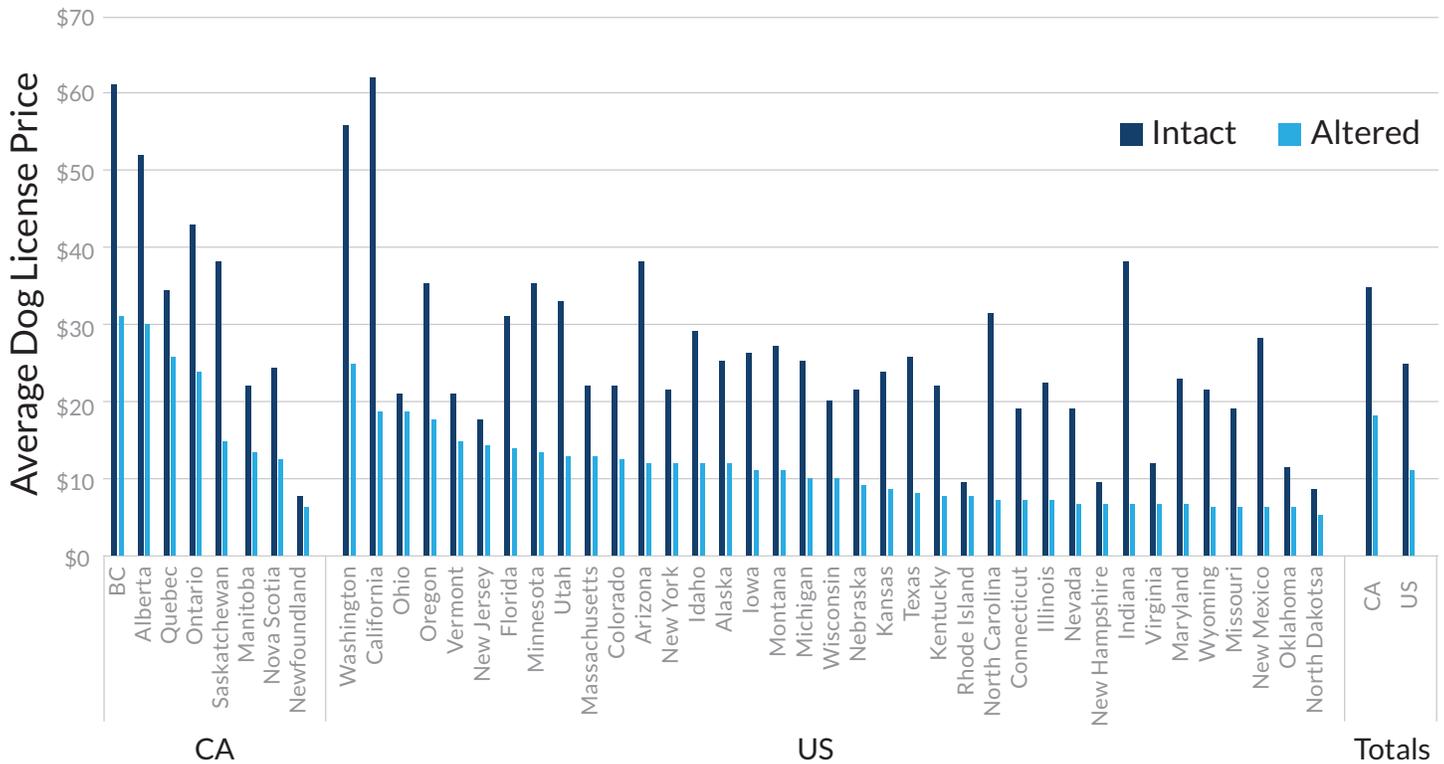


Figure 9. Average dog license prices for states/provinces for which data was obtained on at least 10 pet licensing programs. Generally, pet license prices are higher in the Western States and Provinces of North America.

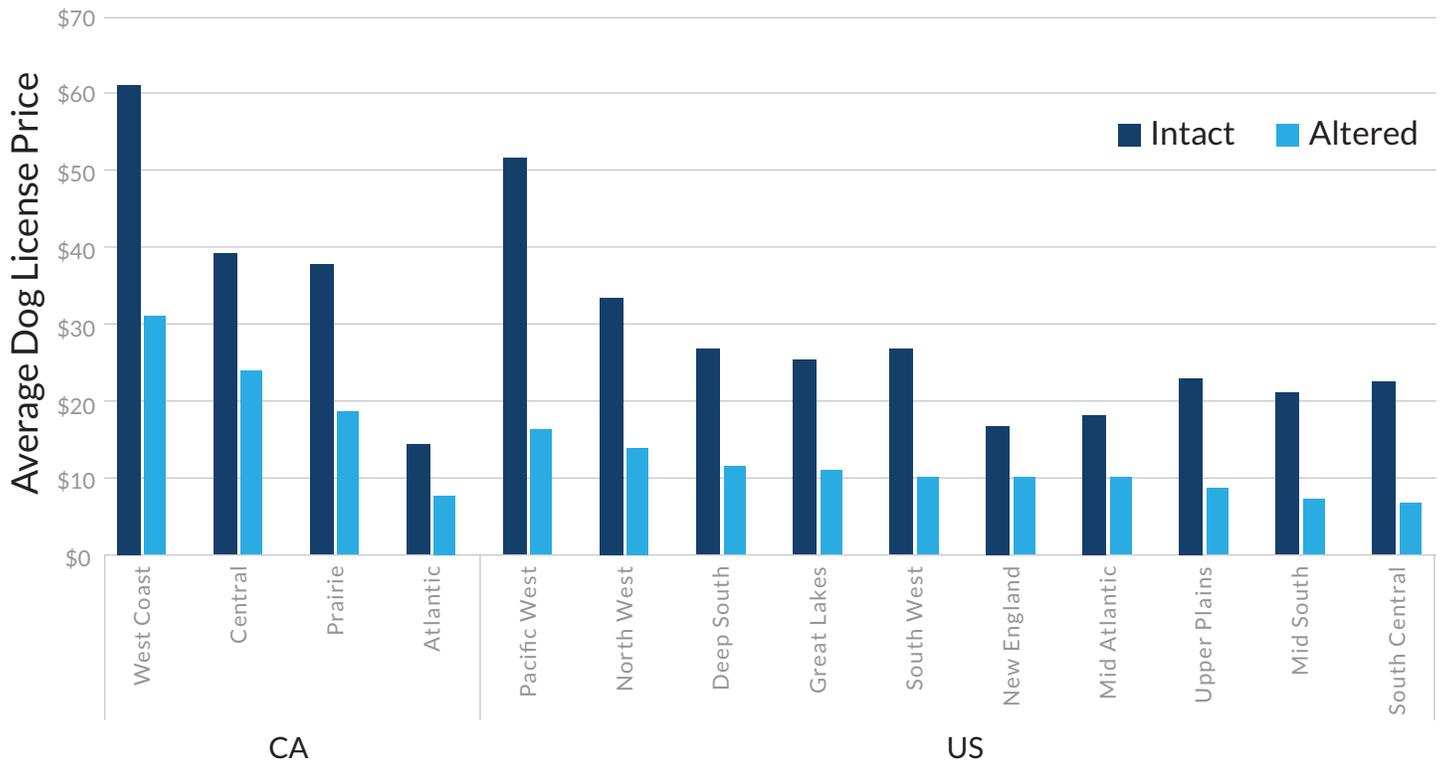
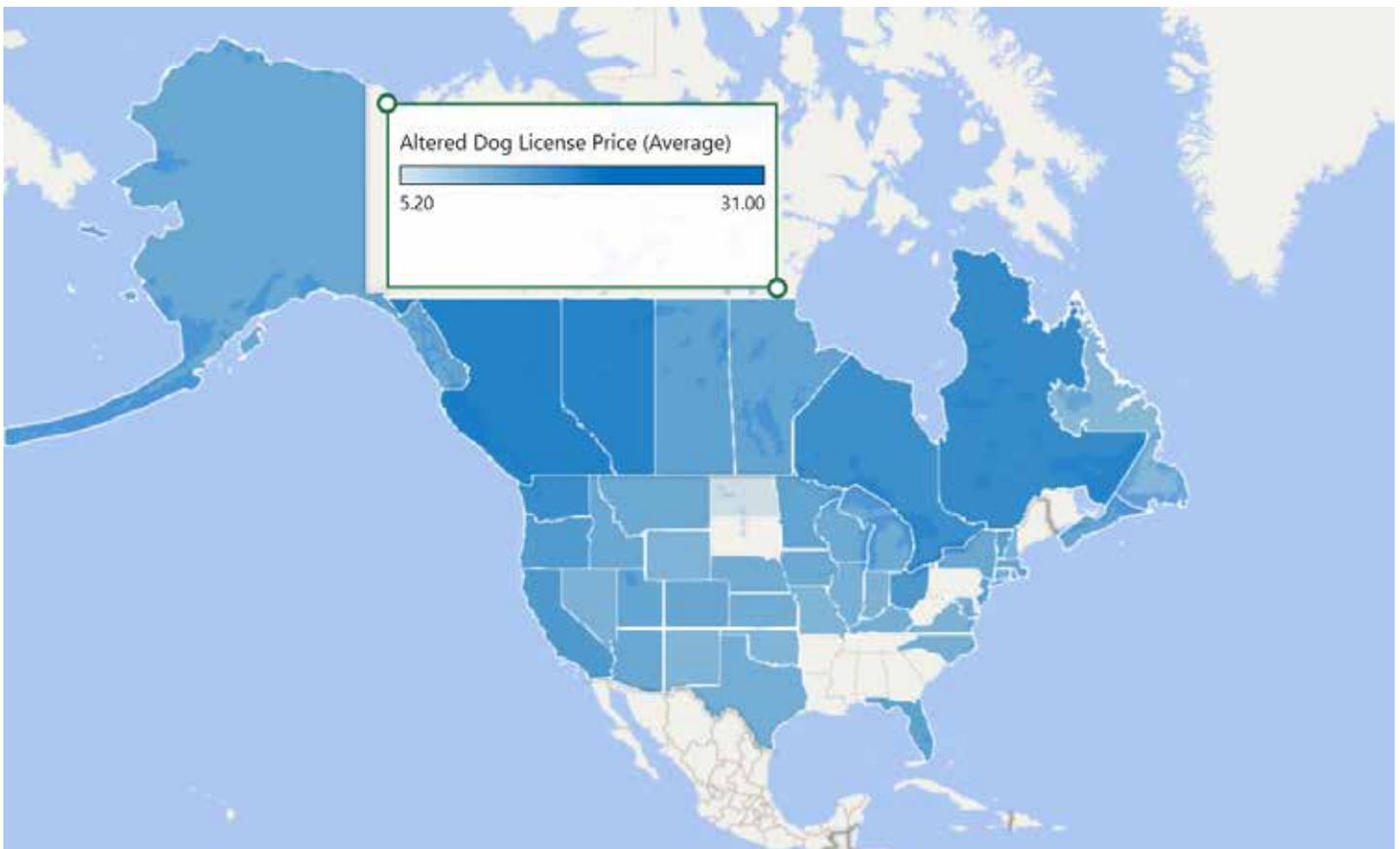


Figure 10. Average dog license prices by region.



8.2 Online Licensing Frequency

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.

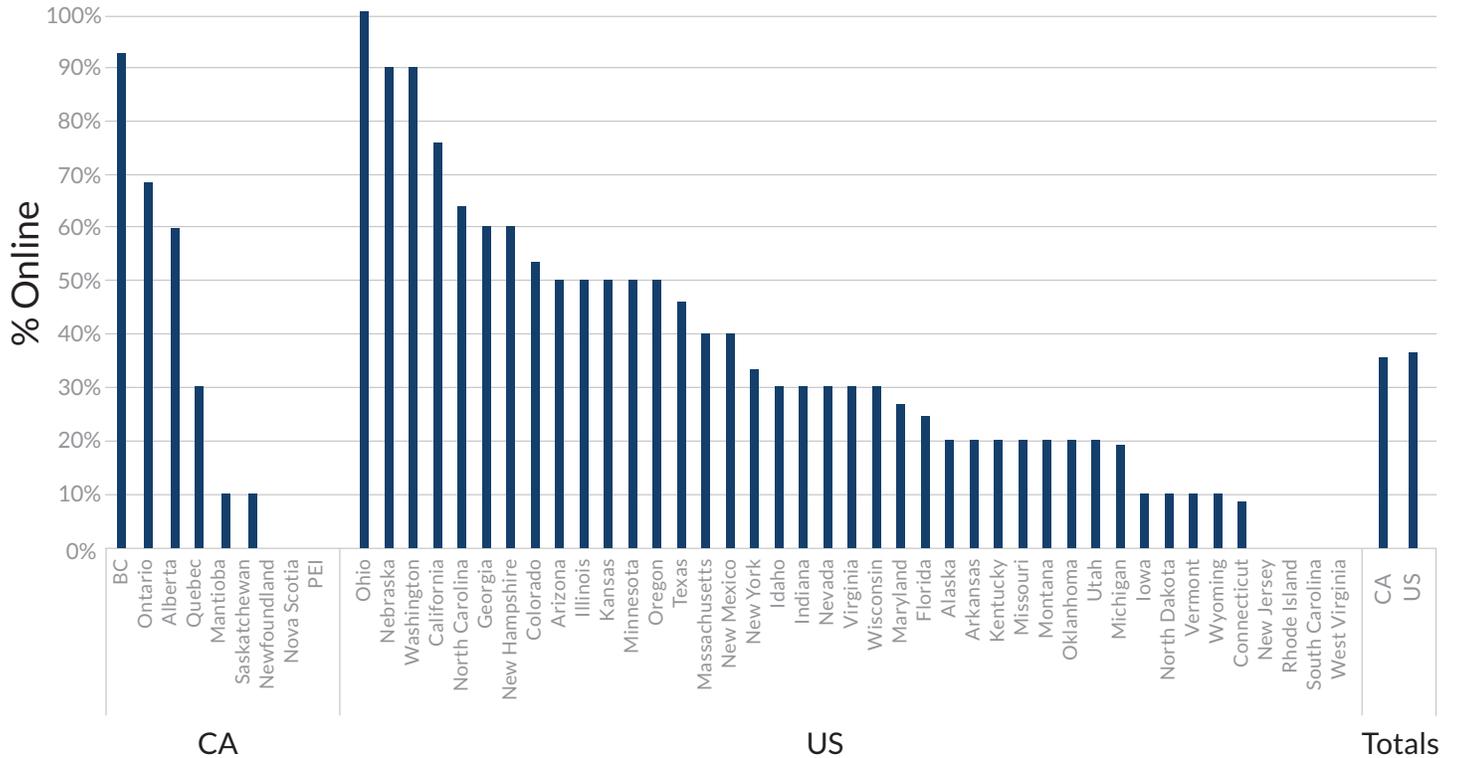


Figure 11. Frequency of online licensing by state/province for which data was obtained on at least 10 pet licensing programs

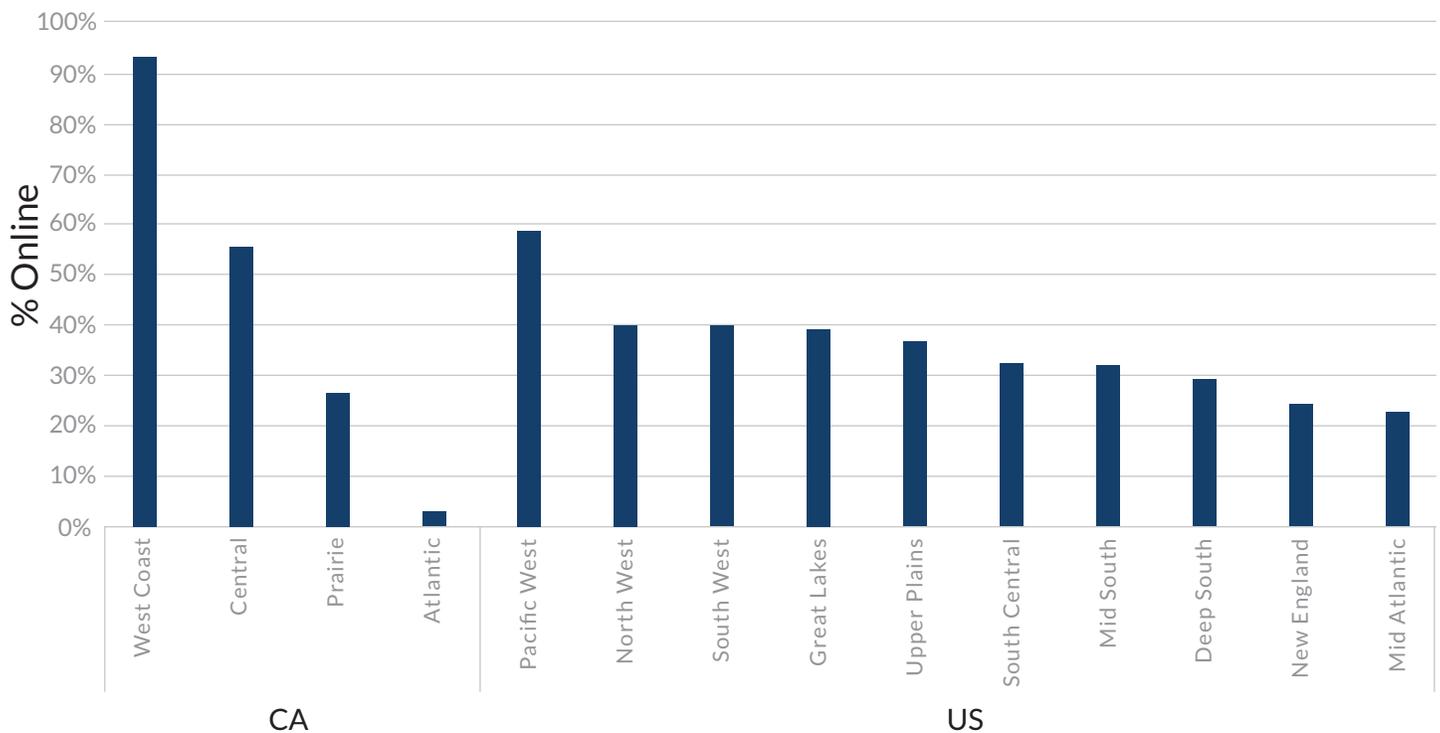


Figure 12. Frequency of online licensing by region. Online licensing is offered most in the western states and provinces of North America, and less so in the south and east.

8.3 Types of Pets Licensed

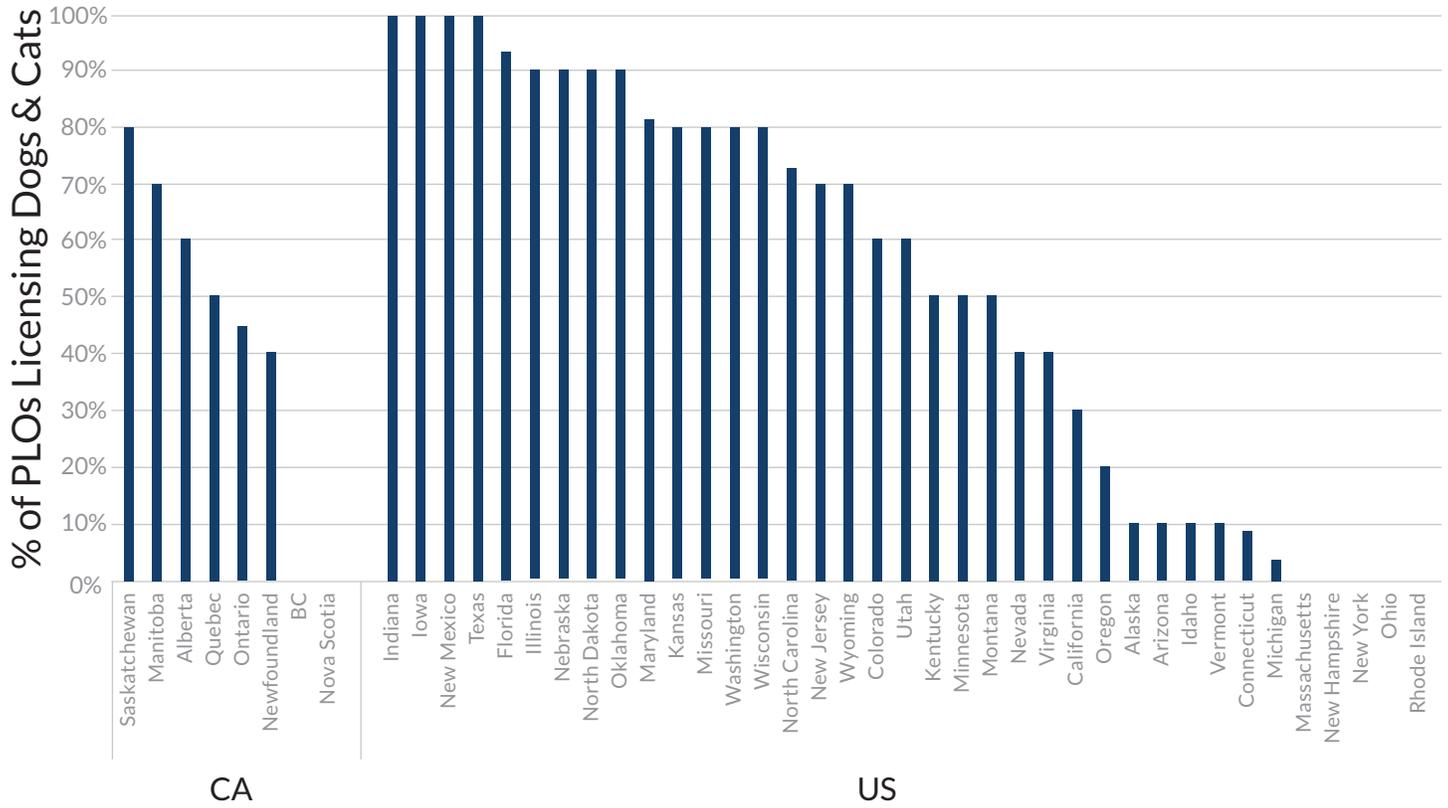


Figure 13. Percentage of researched PLOs that license both cats and dogs by state/province, for which data was obtained on at least 10 pet licensing programs per region. A 100% signifies that every PLO in the state/province licenses both cats and dogs, while a 0% signifies that every PLO in the state/province licenses solely dogs.

About the Study

This is the first edition of our annual Pet Licensing Benchmarking Research Report. As previously noted, a large portion of the data for investigating and comparing pet licensing programs was obtained through the market research survey we commissioned. We hope to receive even more respondents on our next survey, which will be sent out in the fall of 2018.

As with any report of this type, the more respondents we receive, the more thorough, accurate, and useful the report will be to PLOs. If you would like to be part of the 2018 survey, or have any additional questions about the report, please contact us at:

DocuPet Inc.
2 Gore Street
Kingston, ON, K7L 2L1
ATTN: Kevin MacKenzie

1-855-249-1370 x301

kevin.mackenzie@docupet.com



DocuPet Inc.
The Trusted Experts In Municipal Pet Licensing
www.learn.docupet.com
1-855-249-1370 x301