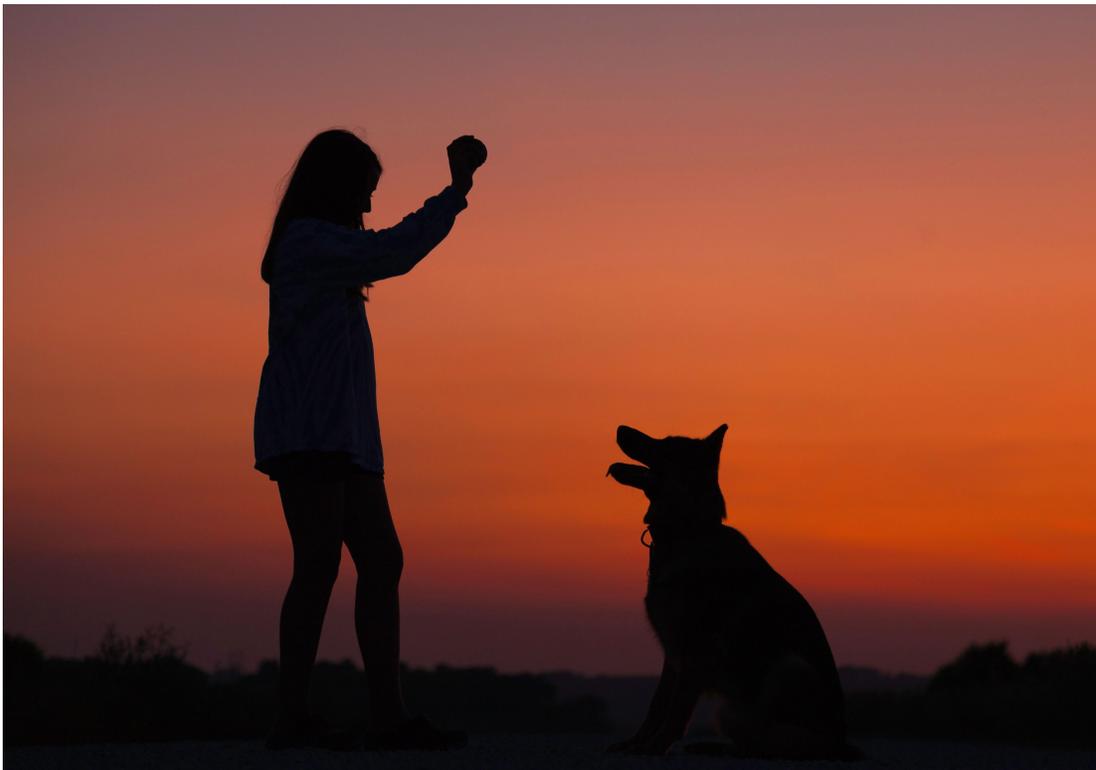


Our Evolving Relationship With Pets – From Companions to Family Members and Beyond



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GEMIC
REIMAGINING MARKETS

OUR EVOLVING RELATIONSHIP WITH PETS –
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Valued in the United States at a whopping \$63 billion, the pet business is an absolute behemoth. A more diverse industry than most, it has staked a big claim to food, snacks, apparel, furniture, toys, health products, tech and more in a way that many of every one of those specific industries could only wish for. And it's only getting bigger and bigger and bigger.

Last year, Americans spent \$11 billion just on pampering their pets with toys, costumes and – yes – even strollers. Among those Americans, Millennials seem to be directing the latest boom. Supposedly a result of their reticence towards ‘real’ relationships and even marriage, they are getting pets like crazy – and treating them more like their own babies than previous generations. Tip: the person who writes and publishes *What To Expect When You're Expecting to Get a Cat* or a *Dog* could quickly join the ranks of millionaires.

That's the key word in the pet industry: relationships.

It's not just man's best friend who is adding to the pet industry's coffers. In the U.K., according to the Pet Food Manufacturer's Association, the number of pet cats in the country has risen by 500,000. Currently in the range of eight million in the last year alone, up from 17.1 per cent in 2016 to 18.3 per cent in 2017, cats are taking over. Again – and this might just be the result of business' fascination with this ‘new cohort’ – the numbers are climbing thanks to Millennials. And, according to recent U.K. studies, those Millennials getting cats are almost overwhelmingly men – men who, perhaps, find it easier to have a relationship with a cat than another person.

That's the key word in the pet industry: relationships. When it comes to our furry (and feathery) friends, relationships seem to drive every

pet purchase. So, what are those relationships founded on? And how, considering that pets don't make the best participants around the consumer co-creation table, can leaders in the pet industry understand those relationships in order to design innovative new products and services for pets?

First, they need to define the big buckets of relationships. Second, they need to understand where the most traction is occurring in them as ‘trends’ today. And third, to differentiate themselves from the pack (pun intended) they need to look to what might be outlier or even older relationships to tap into the unknown, unmet and unarticulated needs, desires and opportunities for pet innovation. At Gemic, we see four big buckets of relationships:

Animals as companions

We love our pets like best friends, especially our dogs. We all know that, and we all know just how important that love is to our lives and how it manifests. Depending on the personality and activities of the human in this ongoing relationship, that love and feeling of friendship likely emerged because we saw our dogs as fun, intelligent, protective, helpful, strong, somehow attractive and/or a constant source of company when we were alone. In fact, we've loved them like best friends for so long that as far back as 3000 BCE, at a site in Kentucky, we were burying dead children with dogs to ensure that they were not lonely and were well taken care of in the afterlife.

But what if this companionship isn't based on any of those reasons but, instead, on the simple fact that our furry friends are, well, furry. According to John Bradshaw, an anthrozoologist at the University of Bristol's Veterinary School, the real reason that we feel so connected to our dogs is an ancestral throwback to the good feelings that we get when we stroke and groom their fur. His theory suggests that because we lost our own early hominid fur some 1.6 million years ago, petting our dogs not only feels ‘natural’ to us but provides us with feelings of comfort and pleasure. While we do not consciously recognize

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them as such, we love our dogs because they remind us of our lost selves.

Animals as family members

If the 91% of Americans polled and the 88% of Australians are any indication, we also love our pets as family members. Consider these factors: they live inside our home, we give them names and we don't eat them. That means that they live in the same social space that we do, that our naming endows them with very human attributes, and that we distinguish them very clearly from the rest of the animal world. In doing so, we blur the species boundaries between us and them, a practice that first emerged in 18th Century Britain when dogs, like children, became a common part of households. And our reverence for them as family members continues after they leave the home.

According to University of Tennessee zooarchaeologist Darcy Morey, the oldest convincing case of dog domestication is from Bonn-Oberkassel, in Germany, from about 14,000 years ago. Unlike the previous companion puppy, this dead dog was buried as part of a human double grave. Typically, in every land mass but Antarctica, dogs were buried by themselves. But because this dog joined its human in the afterlife and was placed in a ritualized way in position to provide maximum comfort – and because other dogs at the time have been found with grave goods – we believe their status was that of family.

Animals as social actors

If culture can be understood as a collection of shared understandings that arise out of face-to-face interactions, then dogs are part of it. As humans pursue routines that express and solidify their relationships with dogs, they create an interspecies culture that enables interaction not only with their dog but with society at large. That's right. Dogs are social actors. Our ownership of them, depending on the level of expense they require, denotes social privilege. From big & mean to cute & cuddly, their temperament denotes a certain identity symbolization by their human. Their presence on walks – wheth-

Dogs symbolically represent the social identity of their owner and extend those social situations in which they attempt to define themselves.

er we are walking with them or accompanied in a wheelchair – gives us more opportunities to meet and talk with other people (and their dogs) more frequently. And perhaps most importantly, because they assist us in receiving significantly more social acknowledgement than when we are alone, they allow us to self-define ourselves, to perform ourselves in public.

Dogs symbolically represent the social identity of their owner and extend those social situations in which they attempt to define themselves. Whether we refer to them as friend, buddy, baby or 'family member', dogs are our *significant other*. Incorporated into our own social networks, they actively facilitate our social lives, they are a key part of what and how we communicate, and they enable the kinds of social experiences that, as pet owners, we value very highly.

Animals as living tools

Some scholars have suggested that dogs probably domesticated themselves, initially living on the fringes of human settlements and then adapting to co-exist with people inside the home. From their perspective, this initial relationship was likely based on their opportunity to pick up food scraps either directly from us or our ancient garbage dumps. From our perspective it was likely an opportunity to study and learn about animals. And with that learning, we learned to use them.

In the 14,000 or so years since their domestica-

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tion, dogs have been invaluable to us: warning us of predators, protecting us from them, helping us track down that night's dinner and making sure we don't get lost out on our adventures. They get us to places. They help us find food. They give us a better chance of not getting eaten by the neighborhood lion. In short, they are functional friends, and were it not for the fur factor we love, we probably would not have fed them and let them live with us unless they did something valuable for us.

It is here where we believe that some truly interesting innovation opportunities in the global pet market lie today. It's not that we are suggesting a return to our hunter-gatherer past or that we abandon our loving and fruitful relationships with pets in favor of turning them into our Jobs-To-Be-Done servants. No, we love our pets just as much as the next person. What we are suggesting is that companies in the pet market might be better served and better serve the humans that pay for their products and services by focusing their innovation efforts on something just a little off to the side of the mainstream pet zeitgeist and its fixation on the themes of companion and family member.

This is where almost every pet innovation plays. Recently, our companions and furry family members have been introduced to DogVacay (Air BnB-type kennels with doggy sitters), Pet Chatz (a Skype-like solution to interact with your pets while you're at work), FitBark (health wearables to track sleep and activity levels), Raw Bistro (a service providing 100% grass-fed, free-range organics) and Pretty Litter (litter that changes color to notify you of potential cat health issues). These and many other pet innovations fall into the categories of pampering, nurturing, interacting, intervening or otherwise acting on behalf of your pet to improve some part of its life. While they will certainly make owners feel better for taking care of their pets, few of them function for the benefit of the owners.

What would it mean for a company in the pet

market to structure its innovation efforts on the theme of Animals as Living Tools? Given how most players are focused on Animals as Companions and Animals as Family members, it could mean a very distinct differentiation from competitors and, hopefully, real function, value and meaning for consumers.

If we were to return to the origins of our relationship and treat Pets as Living Tools, what might the market offer? Well, here are just a few thought starters.

The Tail Charger

One way of using our dogs productively and ethically, without making them feel any discomfort, would be with the help of a portable charger that could be attached to our furry companion's tail. Let's have a closer look at how this seemingly silly idea could work in practice.

Solar panels are currently the only feasible option for the effortless charging of portable devices when on the go. The issue is that the most affordable options are less effective in climates where the sun hides behind the clouds for most of the year. An alternative is a device that allows us to create small volumes of electricity through the kinetic energy of vibrations. The most popular option on the market is currently in the form of a hand-crank. However, the main issue with this solution is that it's not as convenient as it could be – and that's where our beloved dog comes in. Why get frustrated with endless rotating when the happy tail is already wagging around furiously right next to us? A Velcro strap-on device is all you'd need to stop putting that valuable rotation power to waste. Of course, the casing would ideally be waterproof, to avoid any accidental damage caused by an unexpected, excited jump into a nearby river.

The benefits to this innovation are simple. Firstly, there's the time that we save when we don't have to worry about rotating the crank ourselves. Secondly, while it may not seem like a big deal,

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using hand-cranked can actually be pretty tiring. If we let the dog do the job for us, the saved energy can be spent on an even longer hike in nature – feeling safe with the knowledge that if we get lost and let the night catches us, a flashlight or a phone can show us the way back. Our companion can happily roam free even longer, in turn making our batteries even fuller. Everyone wins.

**As a social technology
themselves, our dogs
could well perform better
than our robots in helping
us through our lives.**

Pet Talk

We know they are highly intelligent. We know that they communicate well with each other and not so badly with us. Well, what if that intelligence and communication was available to us beyond the sounds we're familiar with and their body language and demeanor?

Soon, it might be. Con Slobodchikoff, professor emeritus of biology at Northern Arizona University and CEO of pet-tech Animal Communications – a company whose motto is “Blending science with empathy for all living beings” – is developing a dictionary of dog barks by collecting and interpreting videos of dog vocalizations. In theory, an app like Siri could then translate an owner's simple words into *woofs* and *barks*, or translate a dog's *woofs* and *barks* into English. While the project is still in its infancy, the possibilities are totally mind-blowing.

Imagine being out for a walk with your dog, your phone buzzes and the message from Rover up

ahead is: “Snake!” Or that Rex announces that, after hours of the two of you searching, he's found your lost child. Or, if you are so inclined, Bowser becomes the most valuable member of your weekend hunting party because he's always the first to locate (and tell you about) a nice 12-point buck. Or, in an evolution of how today's therapy dogs assist their owners, Mikey's vocalizations clearly warn you of seizures, low blood sugar or even impending cancer.

Franken Pets

A genome-editing technique called CRISPR – Clustered Regularly Interspaced Short Palindromic Repeats – allows scientists to modify DNA by cutting out undesired genes and inserting new ones. It's relatively cheap and has potential applications in medicine, agriculture and animals. With the first embryos ready this year, scientists have already used it to insert synthetic woolly-mammoth genes into elephant cells, although nobody is certain whether the result will develop into a living animal. They are even looking to grow beagles with double the typical muscle mass to produce a super pup.

While the ethics of this approach are, perhaps, shaky at best, you can bet that if it works, somebody will be all over it. And if ethics are really your sticking point, ask yourself about the generations of gene manipulation we've already engaged in with our pets through the selective breeding that has maintained pure breeds for so long.

Should CRISPR prove effective, the possibilities for a pet market that can stomach this science will be huge: faster dogs, more aggressive dogs, cuter dogs and so on. Dog owners will compete among themselves to produce the biggest, brightest and best.

Match Maker

A variety of studies illustrate how dogs help us facilitate human social connections. On walks and at the park, they are an effective mediator

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in helping us to meet and socialize with other humans. So, what if your dog could smell human pheromones, interpret them in the same way a human might, and be able to suggest good partnerships or make a mate match?

If that sounds a little far-fetched consider this: the apocrine gland produces scents that convey social information through pheromones. That's why dogs like to sniff crotches. Recent studies have found Australian shepherd dogs picking out cows that have just ovulated to assist farmers in breeding; Law Enforcement trainers recount how their dogs are able to distinguish people in a high state of fear or arousal through scent; and bomb sniffers are not just looking for the scent of bomb-making material but for the nervous sweat deposited on the bombs by those who made them.

So if dogs can so accurately detect pheromones, could they not be trained to pick out specific cues about the human they are sniffing and – perhaps through a translation app – convey information about that human to their human? Like, “Hey Bob, I’ve met a nice, calm, gentle lady over here that I think you might like.” Combined with their ability to visually read human emotion by focusing on the left side of our faces – a fact pointed out by Daniel Mills at the University of Lincoln that other animals do not do – pups already have a pretty accurate read on the humans in their midst.

While the training and technology that would enable such innovations to see the light of day might never arrive, that does not discount the opportunities that lie within the theme of Pets as Living Tools. For thousands of years, dogs have been our extra-somatic tool to help us expand the resources we can exploit. There is no reason to think that now that we are out of our caves and rarely in the neighborhoods of giant grizzlies that we no longer require our tool companions. Only the tasks have changed. And if, as many have suggested, pet ownership in its current form is unsustainable in our growing, urbanized populations, it might only be those pets that have a secondary value that we will be able to afford.

And we might consider affordability, especially with robots right around the corner. As a social technology themselves, our dogs could well perform better than our robots in helping us through our lives. They provide a good example of what robots need to become: lots of varieties, multiple purposes, various formats and a uncanny attunement to our human needs.

For more information about Gemic and how we might be able to help with your business challenges please get in touch:

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