

# Ethnographic Reconnaissance

## Activating the Purchase Decision in the Modern Pet Owner

A study presented by Two West, Inc.

### SITUATION

As consumer pet ownership continues to increase and pet owners are continually striving to create better lives for themselves and their pets, the potential to serve these consumers is presenting some remarkable opportunities. However, in this market environment, the space is flooded with products and services. So how can a marketer truly begin to understand how today's pet owners purchase and consume products or services?

Tied to this is the question of how they conceptualize their pets, as well as how they understand and construct meanings around "experts." On the surface, both of these issues seem to have common sense answers. But if asked to define what it is that makes a person's hunting dogs different from the beagle that lives in the house, and the distinctions become exceedingly difficult to articulate. Ask them where they learned about the flea and tick treatments they use and it's very likely they will discuss their groomer just as often as their veterinarian.

What this means, then, for a marketer is that a seemingly simple, straightforward situation is in fact fairly complex, and the best way to develop a campaign is to address both explicit and implicit needs. The definition of "expert" must be redefined in this context, and a more complete understanding of what roles pets and animals play in people's lives is vital to the success of a campaign.

### This study will:

- Explain research methods utilized to best uncover latent needs and innate motivators among pet owners.
- Identify and broaden understanding of key influencers in pet owner purchasing decisions.
- Develop initial marketing strategies a marketer might employ to stimulate product sales and brand awareness.

### METHOD

To develop this deep level of consumer understanding, Two West employs observational and ethnographically informed field research. Ethnography means trying to understand behavior and culture by going out and talking to people wherever they are, while they are doing whatever it is they do. It means entering someone's world for a while, be it a couple of hours or a couple of days. This allows researchers to capture the significant contexts surrounding any arena of interaction. Understanding these contexts helps companies identify and talk to

the beliefs, needs, processes and hidden triggers of their consumers.

Equally important is the analytical component. Without solid analysis that is grounded in social, cultural, and cognitive science the end result is simply a series of anecdotes and personal theories. Ethnography means looking at and analyzing events through the anthropological lens, searching for hidden meanings, cultural symbolism, and the contexts in which people experience the world. Ethnography seeks to find information that ties together large-sample statistical data and individual psychology – it seeks out why people do what they do, believe what they believe, and say what they say with a focus on culture, interaction and context. And it is at this juncture where truly differentiating advantages, both tactical and strategic, lie.

The final outcome of this method is an expanded understanding of the complexities and patterns beyond the obvious. This method of insight collection consists of observational research and intercept interviews with pet owners and veterinary professionals in locations such as off-leash parks, pet resorts, veterinary clinics, shelters, etc, to gain a high-level understanding of underlying motivators as it relates to pet care.

By combining insights gathered through this method with previously gathered quantitative data, marketers gain a comprehensive understanding of their target consumer.

## **SAMPLE STUDY**

To demonstrate our methodology, Two West sent a field team to conduct a study in the Kansas City metropolitan area. While this is by no means exhaustive, it has set the groundwork for deeper exploration and allowed us to refine and better target our areas of inquiry. Based on initial fieldwork, a second phase of research is planned for autumn of 2008.

The field team spent time visiting dog parks, pet retail chains, pet resorts, shelters, veterinary clinics and pet owner homes. During this study, the following raw field insights were collected and weighed against the majority of marketing and advertising produced by pet health product manufacturers to date. In the case of flea and tick products, a large amount of marketing dollars are geared toward veterinarians and clinics, which, on the surface, makes sense. But for the end customer, the person with the pet, the process of learning begins earlier and often revolves as much around unofficial experts as it does the veterinary professional.

The field study was conducted in various locations in the Kansas City area. The insight summaries below demonstrate how the data is collected represented. Following the insights summaries, initial strategies and implications have been laid out to see examples of ideas that can be generated by such research.

### **The Dog Park**

The dog park is communal space wherein people and pets congregate. They share

advice, tell stories and discuss topics of interest to people engaged in what we will simply term “dog culture”. Waste-bag dispensers are sporadic and disorganized, toys laying around for all dogs to play with and communal water bowls are located at front gate and upper gathering area. Random leashes hanging on the fences near gates, it is unlikely they belong to anybody at the park. “Regulars” gather at the picnic tables to talk and socialize, while “Irregulars” hang around the peripheral fences with dogs and observe, waiting to be invited into the fold.

In communities defined by shared interests and shared materials, there is usually a strong sense of trust that extends into how the value of knowledge is perceived. The opinions of the fellow pet owner often hold more weight than the opinions of the expert, be it a veterinarian or vet tech. Becoming part of these social units means gaining their trust and advocacy.

### The Animal Hospital

There is no doubt that the veterinarians and staff at clinics care about the animals they treat and the people who live with them. They often own multiple pets and sometimes find themselves lying awake at night thinking about animals they've treated or operated on. But at the end of the day, they are small business owners. Time and resources are limited, both for explaining products to pet owners and for dealing with pharmaceutical representatives. One veterinarian commented, “They don't teach business in vet school. Perhaps there's an opportunity to sponsor business education for vets. Especially the 'old school' vets on current trends.”

Oddly enough, more affluent individuals spending less on their pets, while less affluent spend more. Veterinarians can't understand how people can spend \$30-\$40 per day on boarding, and complain about a \$25 rabies shot. Again, context likely plays a part in this phenomenon.

The offices are usually filled with pharmaceutical collateral and images of animal anatomy. From the perspective of the visitor, everything signals cold science and big business. The warmth and candor of a veterinarian or the staff is diminished. Levels of trust are curtailed. Consequently, anyone and anything in a clinic is defined within severe social limits and couched in impersonal terms.

### The Pet Supply Store

The pet supply store in and of itself presented nothing surprising. Signage is everywhere and employees move between stocking shelves, checking out customers, and answering questions. Consumers question the expertise of staff because they are low-wage employees. However, within every store there are several “animal fanatics” who are viewed as credible by the people they interact with. This perception is only created, though, after the customer has engaged with this employee.

Additionally, pet supply stores have “specialists”. Groomers, vet techs, etc. are pushed to the edges of the store, and have a different façade. This symbolically sets them up as being something more credible and professional. It takes special training and expertise to work in

these sections of the building and the people in these places are smart. While a groomer might not be able to discuss heartworm prevention, his/her occupation does set them up as an expert in all things dealing with the skin and by extension, flea and tick prevention.

### The Shelter

Shelters are unique in terms of trust and credibility. Anyone working at a shelter, particularly a no kill shelter, is given a near saintly status. They are the pinnacle of trustworthiness and affection, devoting themselves to the welfare of animals regardless of reward. Interestingly, people who adopt a pet will frequently make return visits to the shelter both to socialize and to get advice on treatment or training for their pets. Pictures and stories of pets are kept in special books that both the staff and visitors can look through. Volunteers and employees can all tell extensive stories about their own pets (many of whom they adopted and nursed back to health), and visiting pets are remembered. All of this potentially sets the stage for creating the perfect combination in establishing brand loyalty.

Granted, adoption care packages come with each adopted pet, which may influence return behavior, but they also serve to reinforce a company's brand on two levels. First, there is simply the issue of familiarity – I used the product once so I'll use it forever. But on a deeper level, the products and brands in the adoption package become associated with the people working and volunteering at the shelter. A veterinarian may suggest switching to product X, but if the people who take on an almost angelic aspect recommend product Y, the owner will likely take the latter recommendation.

Added to the sense of selflessness, is the fact that many staff members are seen as being “scientists,” particularly if, and many of them do hold degrees in biology, primatology, or another “animal science” field. Expertise and commitment are conveyed through the stories told, both personal and about the animals.

### The Pet Hotel

Pet Hotel staff was incredibly knowledgeable and willing to discuss their views. As with the staff at shelters, the staff had stories and advice readily willing to disperse. For example, the general manager of a pet hotel owned hunting dogs, which was her reason for using Advantix for flea and tick prevention.

“If it's strong enough to deal with what comes at a hunting dog, it can handle anything coming at a typical companion pet.”

The story was meant to convey real-world applications rather than what she considered to be vague recommendations from vets.

Two central insights came from these encounters. First, life experience conveys expertise. Second, unlike a veterinarian, this person has nothing to gain from pitching a product – profit motives are absent, only the pet's well-being is important. Suggestions about medication are made on a fairly regular basis, but people in these positions are always careful to state

that it is personal experience, not formal training. So, while credibility is established, it always involves getting a second opinion from the vet, thus forcing a discussion of preferred brands and products.

### **IDEAS, INSIGHT, AND APPLICATION**

By utilizing the insights gathered in the field, the Two West team was able to begin the formation of strategies that might be employed to better target pet owners with a product or service.

First and foremost, the learning from an “expert” begins well before a visit to the veterinarian. It is driven by context and a sense of real-life experiences. The owner of a pet daycare facility and the person with hunting dogs has types of experiences that go beyond what is addressed by the clinician. So, how might this insight be developed into an executable strategy? A company could deploy representatives in major metro areas that would be responsible for spreading the word about a product among shelters, resorts, retail and groomers. These locations have the “real” referrers, not the vets. This ambassador would have a very different function from sales reps and would engage unofficial experts and consumers in their normal environments to establish awareness without the motivation of sales.

Other opportunities might include sponsoring entire dog parks or shelters to demonstrate on an emotional and grass roots level, that the company cares about the same things pet owners do. The idea is to become a point of reference for consumers when they make visits to clinics, pet hospitals, or any other venue where pet health products are sold and prescribed.

The second major insight is that the “type” of pet impacts where you go to get information about what to use. How a pet is functionally and symbolically conceptualized has a dramatic impact on purchase choices. If, for example, a dog is seen primarily as a work animal or investment vs. companion and a part of the family, it impacts how and why people invest in that animal. If a cat is an “indoor” vs. “outdoor” cat, it sets expectations about what are acceptable levels of disease and/or discomfort. Ultimately these issues shape whom the consumer asks for product advice, how and where they shop, what types of messaging and imagery they respond to, and how they define “expertise”. It is in these points of implicit meaning that marketing opportunities lie.

Further field research and in-depth analysis are planned, and will yield highly developed and targeted strategies and tactics.

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