



Reducing Demand for Exotic Pets in Japan

Formative Research on Consumer Demand for Exotic Pets to Inform Social and Behavioral Change Initiatives

A Report by GlobeScan Incorporated – December 2021

Prepared for WWF Japan and TRAFFIC



TRAFFIC

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1. Background and Objectives

Background

Among the many threats facing wild animals today, the international pet trade is well established as a factor that is driving some species toward extinction. There is a large number of animals and a broad range of taxa in the pet trade in Japan. Despite the high numbers of exotic pets in trade in the country, the risks to public health, ecological integrity, and animal welfare are generally not recognized by businesses or consumers and are of low priority for policy makers. The popularity of exotic pets is amplified in Japan because of social media and exotic animal cafés, of which Japan has the greatest number in East and Southeast Asia. Reptiles make up over 70 percent of exotic pets seized by Japanese customs, followed by mammals (primarily primates). Once inside the country, almost all the species in seizure records can be sold without restriction in the domestic market, effectively laundering the smuggled animals, including those that bring a high risk of disease, into legal trade. There is also a lack of animal welfare regulation to prohibit or regulate exotic animal cafés or to ensure that animals kept as pets receive adequate care for their specific needs.

To better understand exotic pet ownership, WWF and TRAFFIC commissioned GlobeScan to conduct a specific study amongst consumers about this topic. The insights from this study will be incorporated in the first social and behavioral change initiative

⁵ targeting exotic pet owners in Japan.

This report, along with the report from the qualitative phase of research (Exotic Pet Ownership in Japan: A Qualitative Research Study to Explore Opportunities to Change Exotic Pet Purchase), provides inputs for the SBC initiative and gives recommendations for the direction that this initiative should take.

Note on the definition of exotic pets: There is no universally agreed-upon definition of exotic pets and any definition used may resonate differently with different people. For this study, we provided the following definition to the survey participants:

“In this survey, we use the terms ‘exotic pet’ and ‘domestic pet.’ While there is no set definition of an exotic pet, the term usually refers to ‘animals that are not considered as common pets, primarily those having overseas and/or wild origins.’ Domestic pets include animals such as dogs, housecats, hamsters, canaries, as well as insects or fish.”

We also provided participants with a list of species to choose from and categorized these according to our own definition of “exotic” and “domestic” so that participants were not required to do so themselves. Insects and fish were categorized as “domestic” in this study for practical reasons to focus on ownership of exotic mammals, birds, reptiles and amphibians.

Context – Prior Research

Opinion survey – WWF Japan

WWF Japan conducted an opinion survey in early 2021 to canvass the general public's attitudes toward exotic pet use and regulations. The key findings were as follows:

- One-third of participants (33%) indicated interest in petting exotic animals, while 17 percent indicated interest in having them as pets. *(Note: the research design and sampling in that study was different compared to this GlobeScan study, so not all figures can be compared one on one. However, in conjunction, these two studies provide a comprehensive picture).*
- Aquarium fishes, hedgehogs, owls, medium-sized birds (e.g., parrots), ferrets, otters, and sugar gliders were among the top-ranked exotic animals desired as pets.
- People aged 15 to 29 accessed information about exotic pets through a wide range of sources including the internet (portal sites as well as websites for zoos and aquariums), TV (shows, commercials), and social media such as Twitter.
- The most common reasons for wanting exotic pets pertained to notions of “*kawaii*” (cute) and “*iyashi*” (healing).

- Sixty-eight percent had little or no knowledge of infectious diseases, animal welfare, endangered species, illegal trade, or invasive species. After being informed, 95 percent responded that they felt the issues were problems that should be addressed.
- Ninety-five percent responded that stronger regulations were “needed” or “somewhat needed,” and after learning of the issues, interest in petting these animals declined to 25 percent (from 33%) and interest in owning declined to 14 percent (from 17%).

Conclusion of previous research: Awareness of the issues with owning exotic pets is low among Japanese citizens but once they are informed, many would perceive these issues as problems. However, few potential consumers would be less interested in having exotic pets by simply being informed so simply raising the awareness of potential problems with owning exotic pets would not result in a desired behavior change amongst the (potential) exotic pet owners in this study. Additional research was required to provide in-depth insights to develop an effective SBC initiative to reduce the demand for exotic animals as pets.

Research Objectives (1)

The objectives of this study can be summarized as follows:

Demographic profile

- Who are purchasing exotic pets, and for what reasons? Do we need to target consumers according to their desired species or by other demographic characteristics or by type of motivation?
- What are the socio-economic and psychographic characteristics of exotic pet owners and those who intend to own exotic pets?
- Can they further be divided into sub-segments, and if so, then based on what criteria?
- In developing SBC initiatives, what are the different motivating factors for the different subgroups? (e.g., younger groups that value *kawaii* (cuteness) vs those that value rarity)

Communication

- What are the messages and narratives that resonate best with the target audience?
- What are the most impactful intervention points? Should initiatives target the point of purchase, or earlier in the consumer journey such as pet stores and pet cafés, or on social media?

- Or should the behavior of visiting exotic pet cafés for petting exotic animals, visiting exotic pet fairs, and posting photos on social networking sites be targeted?
- What media/influencers/communities are driving the interest in exotic pets for consumer groups? (e.g., specific names of TV shows, magazines, influencers, communities)
- Who are the influencers of these consumer groups? What media, influencers, or communities have influence on the target group, particularly those who may dissuade or de-incentivize target behavior?
- What are the most effective channels to reach them?

Research Objectives (2) and Survey Design

Drivers and deterrents of purchase

- What are the motivating factors (drivers) and deterrents (i.e., factors that the target audience feel will dissuade them or put them at risk for continuing current behaviors) for owning or desiring exotic pets?
- How is interest in seeing exotic animals in pet stores / pet fairs and petting them in animal cafés related to motivations to own exotic pets (of the same person or others)?

How to change

- What is the consumer journey between becoming interested in and the actual purchasing behavior pertaining to exotic pets?
- How do we effectively change behavior/perceptions at touchpoints where the intention to buy an exotic animal gets strengthened or where it turns into actual purchase behavior?
- Who/what will make them change their consumption and purchase patterns? Do we need alternatives to these products which can meet the same underlying motivations? Are there any alternatives to exotic pets that can resonate with the target group? (e.g., dogs and cats)

- What types of tactics can be used within the cultural context of the consumer segments? What are the specific tactics for the younger group (if identified as the target)? Considering the COVID pandemic, will information on zoonotic disease dissuade consumers?

Survey Design

This study employed a mixed-method approach to answer the research objectives using qualitative and quantitative data collection.

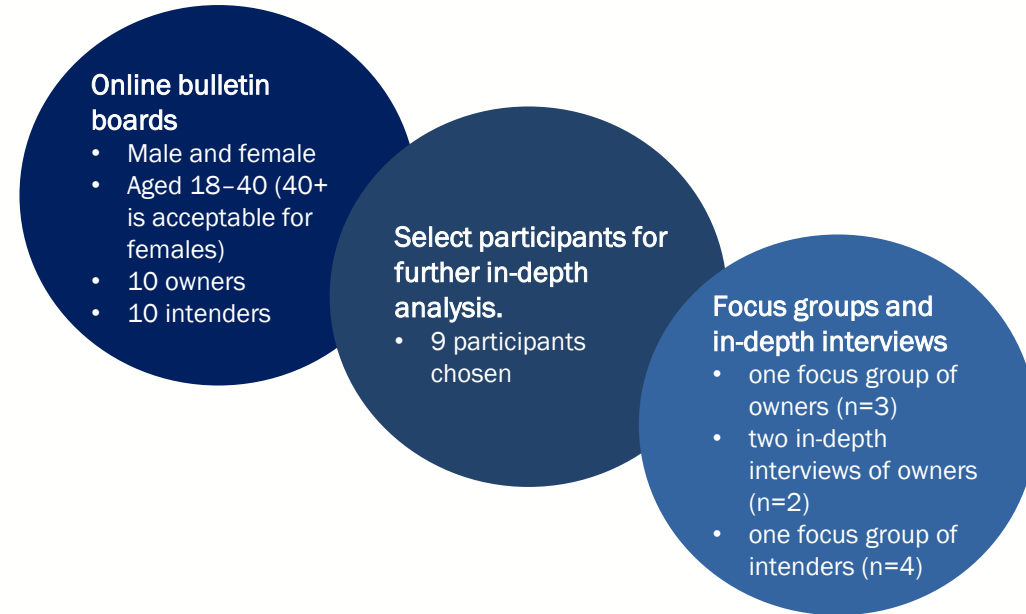
Qualitative data collection allows for in-depth discussions to gain insights from people who have purchased, or intend to purchase, exotic pets.

Quantitative data collection provides robust, comparable results that allow for analysis of trends and preferences across representative research populations. These data can be used to spot trends in exotic pet ownership, beliefs, knowledge, and attitudes.

Research Design

Qualitative data collection

In the qualitative phase, we first wanted to explore and better understand exotic pet owners and intenders. We conducted an in-depth survey about their perceptions and attitudes toward the purchase and ownership of exotic pets. Twenty participants were asked to take part in an online bulletin board between the 19th and 22nd of June 2021. In the online bulletin board, participants answered questions and upload content relating to their pets or the pets they intended to buy over the course of several days, prompted by a moderator and pre-defined questions/tasks. Seven of these participants were then asked to take part in online focus group discussions (one group of four people who planned to buy an exotic pet and one group of three exotic pet owners). In addition, in-depth interviews were conducted (two in-depth interviews with exotic pet owners) from 26th – 30th June. These focus groups and in-depth interviews explored the triggers that lead to the decision to own an exotic pet and what works as a deterrent to keeping an exotic animal, in order to inform future campaigns and communications. The qualitative research is meant to supplement the quantitative data collection, but it should be noted that the qualitative data represents the opinions of only a small group of exotic pet owners and intenders.



Note: While elements of the qualitative data collection are reproduced within this report, a separate, more comprehensive report was prepared for WWF and TRAFFIC.

Research Design

Quantitative data collection

In the quantitative phase, we used the information gathered from the qualitative phase to create a questionnaire on a broad range of topics relating to exotic pet ownership in Japan. We conducted fieldwork between the 15th of September and the 7th of October 2021 and from a starting sample of 16,000 consumers, we interviewed 1,000 participants. Participants from an online panel were invited to join in the online survey via email. Participants could answer the survey either on their smartphones or on their computers, at their convenience. Any participants under 18 years of age were screened out and were not permitted to participate in the survey. Quotas were set on the number of exotic pet owners, intenders, non-owners, and non-intenders, and this sample is therefore not representative of the general population of Japan.

Exotic Pet Owner ($n=329$): A person who currently owns one or more of the taxa defined as “exotic” in this study (right); referred to as “Owners” in this report.

Intender ($n=336$): A person who plans to own one or more of the taxa defined as “exotic” in this study (right), in the foreseeable future, but does not currently own one; referred to as “intenders” in this report.

Non-owner/Non-intender ($n=331$): A person who does not own an exotic pet (as defined by this study) or does not intend to buy one. These participants may own domestic pets.

Exotic Pets, as Defined by This Study and Presented to Participants*

Category	Taxa
Reptile	Snake
	Lizard (e.g., geckos, bearded dragons, chameleons, iguanas, monitors, skinks)
	Turtle/tortoise
	Other reptile (e.g., crocodiles, caimans)
Bird	Parrot (African grey parrots, macaws, cockatoos, galahs)
	Birds of prey (e.g., owls, hawks, falcons)
	Other non-domestic birds (e.g., munias, starlings, hummingbirds, cordon-bleus, toucans, penguins, pelicans, peacocks)
Amphibian	Newt/salamander
	Toad/frog
Mammal	Exotic rodent (e.g., dormouse, chinchilla, degu, prairie dog, squirrel, capybara, flying squirrel)
	Exotic feline (e.g., civet cats, sand cats)
	Primate (e.g., slow lorises, galagoes, common marmosets)
	Sugar glider
	Otter
	Hedgehog
	Ferret
	Meerkat
	Fennec fox
	Other exotic mammal (e.g., wallaby, sloth, badger, binturong, racoon)
Other	Other exotic animal (please specify)

*Note: for a list of domestic animals, as defined by this study, see page 87



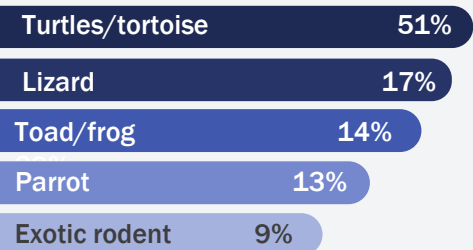
2. Key Findings



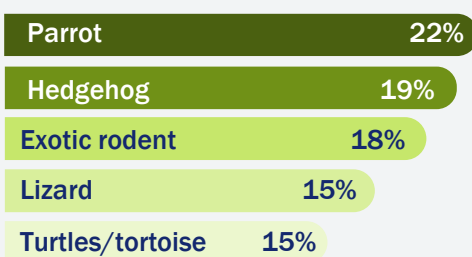
Key Findings (1)

2% own exotic pets and 1% intend to buy them*

Exotic Animals Owned (n=329)
(page 24)

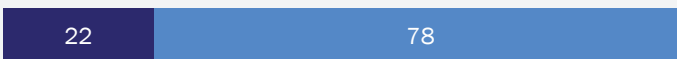


Intended Exotic Animals to Own (n=336) (page 24)



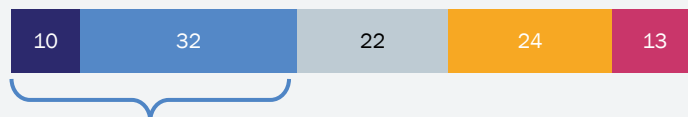
Exotic Pet Owners – Past 12-month Purchase
(n=329) (%) (page 26)

Bought in the last 12 months Bought more than 12 months ago



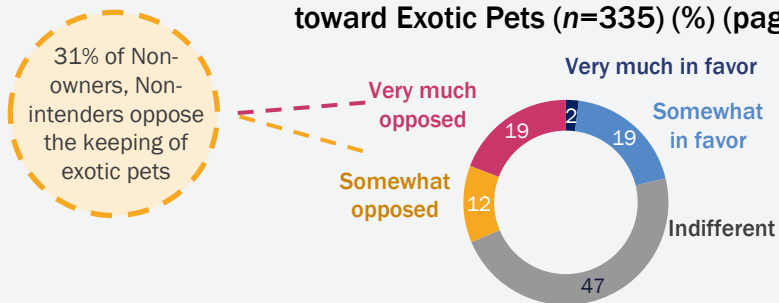
Exotic Pet Intenders – Likelihood to Buy in the Next 12 Months (n=336) (%) (page 27)

Very likely Likely Neither likely nor unlikely Unlikely Very unlikely

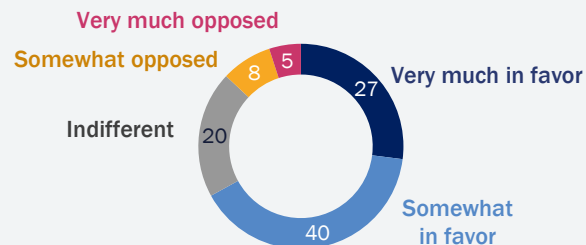


42% are Serious Intenders

Exotic Pet Non-owners, Non-intenders – Attitudes toward Exotic Pets (n=335) (%) (page 29)

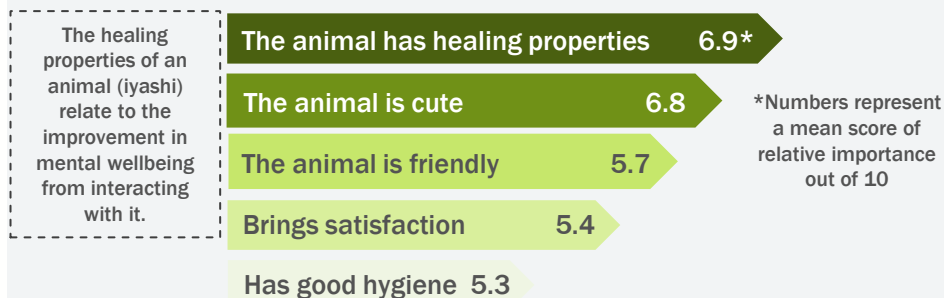


Exotic Pet Owners and Intenders – Family & Friends' Attitudes toward Exotic Pets (n=665) (%) (page 30)

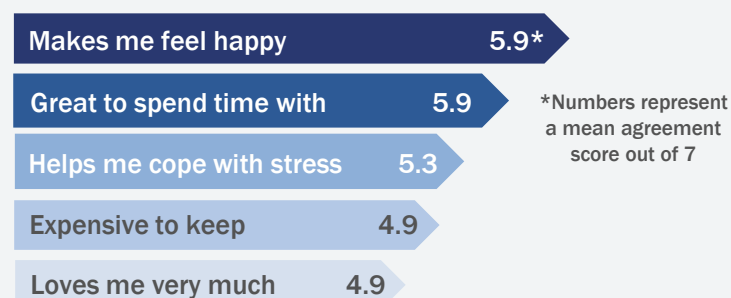


Key Findings (2)

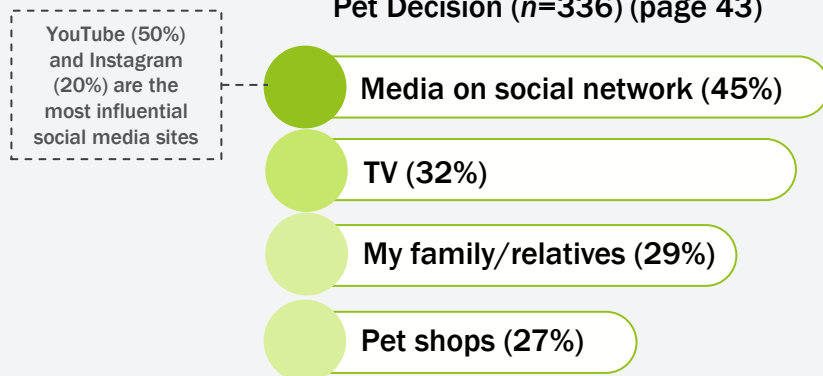
Exotic Pet Intenders – Drivers of Pet Ownership (n=336) (page 32)



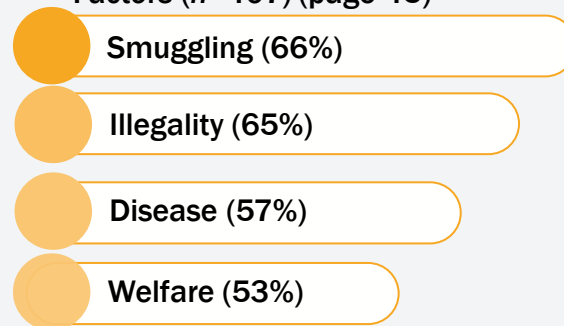
Exotic Pet Intenders – The Expected Experience of Owning an Exotic Pet (n=329) (page 55)



Exotic Pet Intenders – Influencing Factors on Pet Decision (n=336) (page 43)

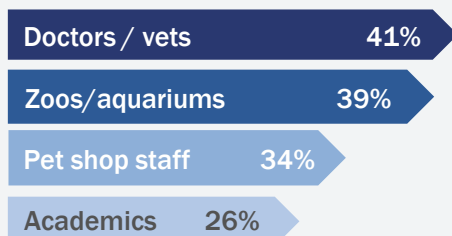


Exotic Pet Intenders and Owners who want to buy another exotic pet – Potential Discouraging Factors (n=407) (page 45)

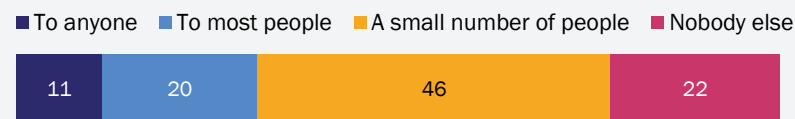


Key Findings (3)

Exotic Pet Intenders – Most Trusted Messengers (n=336) (page 48)



Exotic Pet Owners – Recommend Owning an Exotic Pet (n=329) (%) (page 52)



Types of Exotic Pet Owner / Intender (n=665) (page 19 – 21) (see appendix page 92 - 93 for methodology of segmentation)

Rational (n=215)

- **Defining characteristics:** more likely to value that the animal is accepted by friends / family, has good hygiene and is not endangered. They are the most likely segment to recognize that demand for exotic pets may lead to smuggling or pose extinction risks.
- Mostly Intenders (60%)
- Least likely to have bought their pet in the past 12 months and least likely to buy in the next 12 months.
- Most likely to be discouraged by the potential issues such as the animal going extinct in the wild, illegality or smuggling.

Convenience (n=237)

- **Defining characteristics:** more likely to value a pet's ease of care and inexpensiveness compared to other segments.
- Mostly Owners (58%)
- More likely to be male and to live with children.
- Most likely group to find the practical challenges such as feeding difficulties and expense to be barriers in the way of owning an exotic pet.
- Least likely to say they are happy with their exotic pets.
- The most frequent visitors to exotic animal cafés and exotic pet fairs compared to other segments.

Emotional Bond (n=213)

- **Defining characteristics:** more likely to value cuteness, satisfaction, and healing properties of the animals compared to other segments. This segment likes animals that are friendly, help them with stress and that love them.
- 50% Owners, 50% Intenders
- More likely to be single, live alone, and are younger.
- Most likely to be influenced by Social Networking Sites.
- They are the happiest owning their exotic pet and most likely to recommend owning one.
- Most frequent visitors to pet shops with exotic animals.



3. Analysis

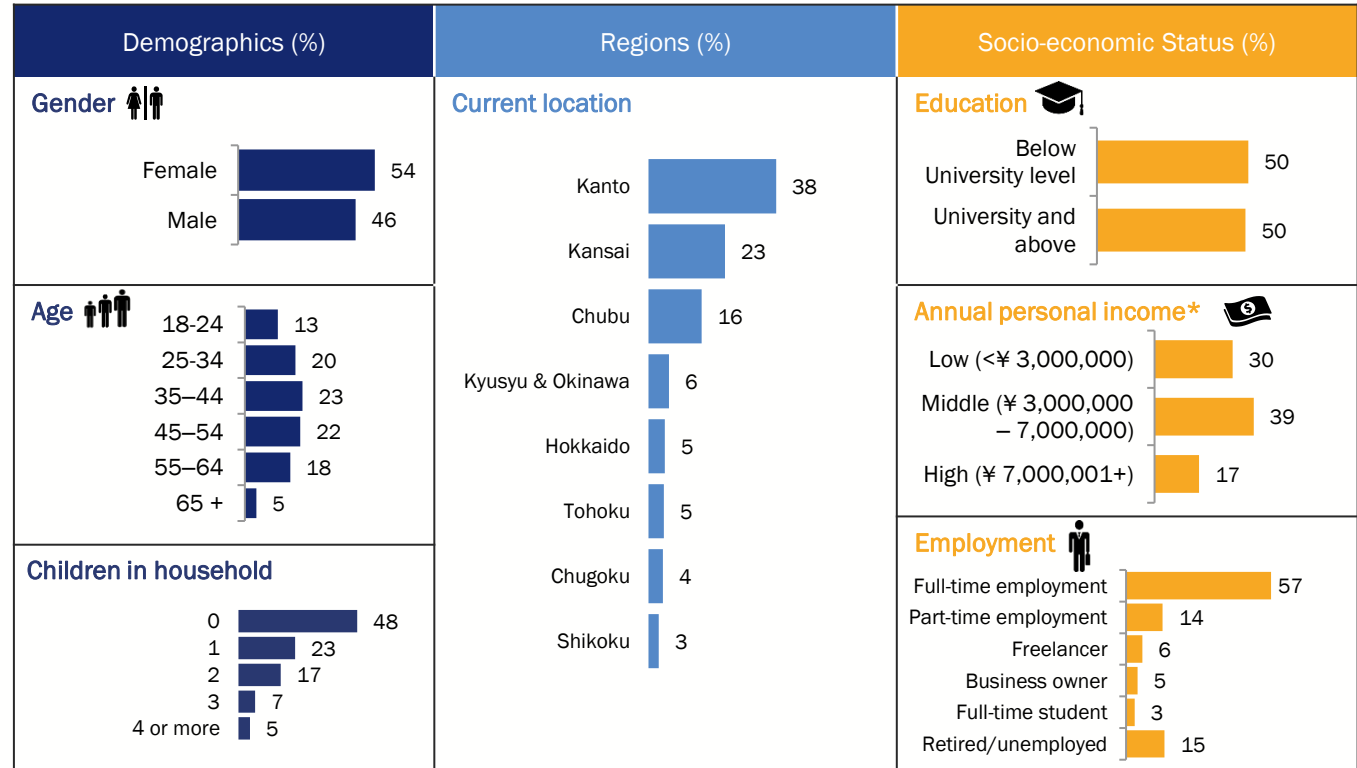
3.1 Breaking Down the Market

Exotic Pet Owners

Exotic Pet Owners (hereafter Owners) are participants who state that they currently own at least one animal from the list of species presented on page 10. As per our quotas, roughly one-third ($n=329$) of our sample is comprised of Owners.

Owners are more likely to be older (aged 35+) compared to Intenders but show similar demographic characteristics to Non-owners/Non-intenders.

Segmentation makeup	
Rational	26%
Convenience	42%
Emotional Bond	32%



*¥ 1,000,000 = USD 8,800

S1. Gender; S2. Current location; S3. Age; S4. Education; Q29. Annual personal income; Q30. Current living situation; Q31. Children; Q32. Number of children; Q33. Employment

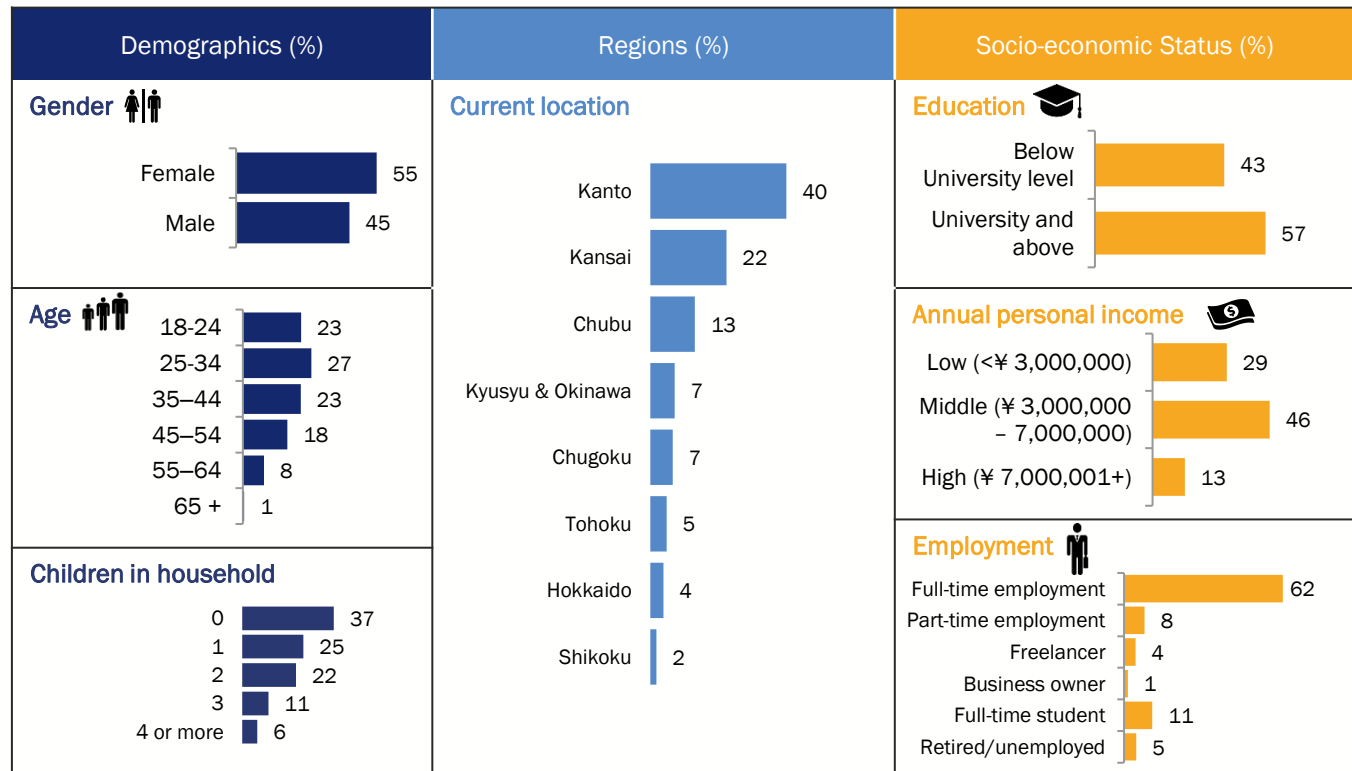
Base: Owners, $n=329$

Exotic Pet Intenders

Exotic Pet Intenders (hereafter Intenders) are participants who do not currently own a pet from any taxa on page 10 but would consider buying an animal from any of these taxa in the foreseeable future. Serious Intenders are “likely” or “very likely” to buy this animal within the next 12 months, while Casual Intenders do not plan to buy their pet within the next 12 months.

Intenders are more likely to be younger (aged 18–34) and are more likely to be full-time students compared to Owners and Non-owners/Non-intenders. They are more likely to have received a university education but have a middle income than other segments.

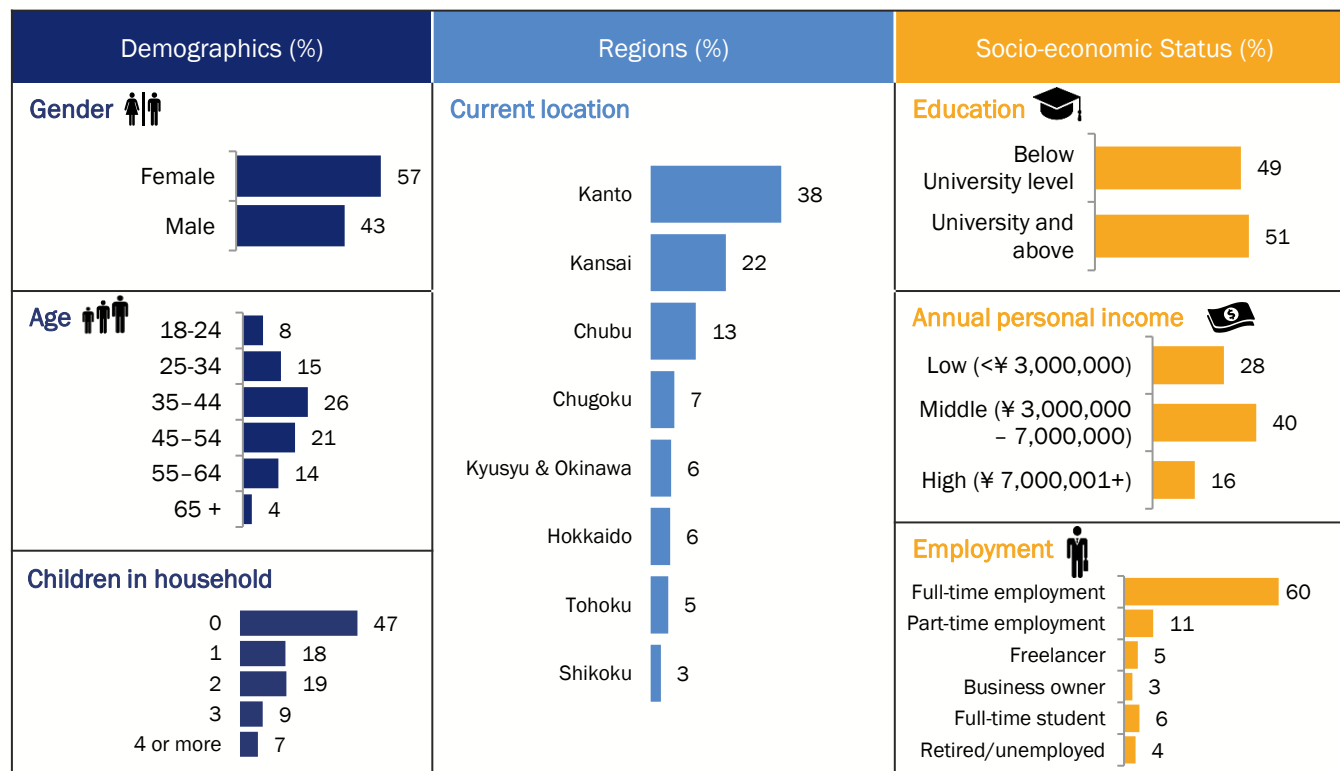
Segmentation makeup	
Rational	39%
Convenience	29%
Emotional Bond	32%



Exotic Pet Non-owners/Non-intenders

Exotic Pet Non-owners/Non-intenders (hereafter Non-owner/Non-intender) are participants who do not currently own a pet from any taxa on page 10 and would not consider buying an animal from any of these taxa in the foreseeable future. This group may own other species such as dogs, cats, or rabbits.

Non-owners/Non-intenders closely resemble the demographic profile of Owners.



S1. Gender; S2. Current location; S3. Age; S4. Education; Q29. Annual personal income; Q30. Current living situation; Q31. Children; Q32. Number of children; Q33. Employment

Base: Non-owners/Non-intenders, n=335

Note: Because not all Non-owners/Non-intenders are included in the segmentation (some have no interest in any animals), the sample size for this group is n=129

Segments of Exotic Pet Owners and Intenders

Among exotic pet Owners or Intenders, we identified three homogeneous segments (see page 92 - 93 for an explanation of the methodology). These segments share many perceptions, drivers, and attitudes toward pet ownership. Some aspects of pet ownership ranked similarly highly (e.g., great to spend time with) or equally low (e.g., the rarity), but others indicate a difference between the segments in their outlook about buying and owning pets.

Emotional Bond (n=213)

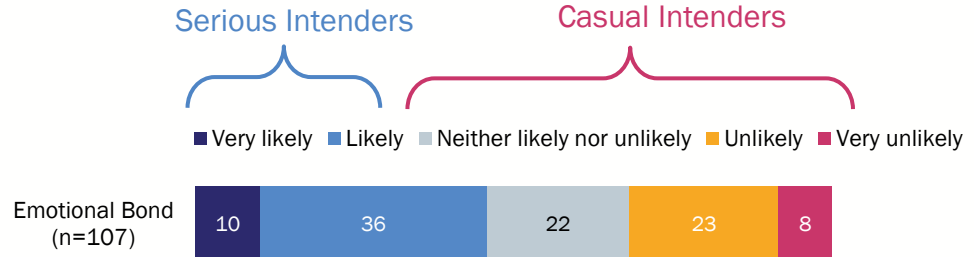
- **Defining characteristics:** more likely to value cuteness, satisfaction, and healing properties of the animals compared to other segments. This segment likes animals that are friendly, help them with stress and that love them. They are the most likely group to say their animal attracts attention. They are more likely to be single, live alone, and are younger than other groups.
- **Preferred exotic taxa (Intenders):** hedgehog, parrot, exotic rodent
- This segment is split evenly between Owners (50%) and Intenders (50%).
- They are the most likely to have had an exotic pet growing up and the most likely to think others are in favour of their pet.
- The drivers of desire in owning an exotic pet are similar to those of domestic animal owners.
- Emotional Bond Owners and Intenders are the most likely to be influenced by Social Networking Sites.
- They are the happiest owning their exotic pet and most likely to recommend owning one.
- They are the most frequent visitors to pet shops with exotic animals.

Exotic Pet Ownership – Among Emotional Bond Segment (n=213) (%)



Among Emotional Bond Intenders

Likelihood to Buy in the Next 12 Months – Among Emotional Bond Intenders (n=107) (%)



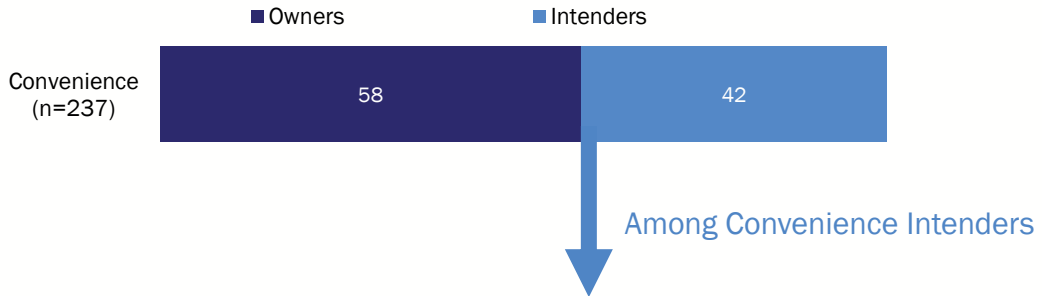
Segments of Exotic Pet Owners and Intenders

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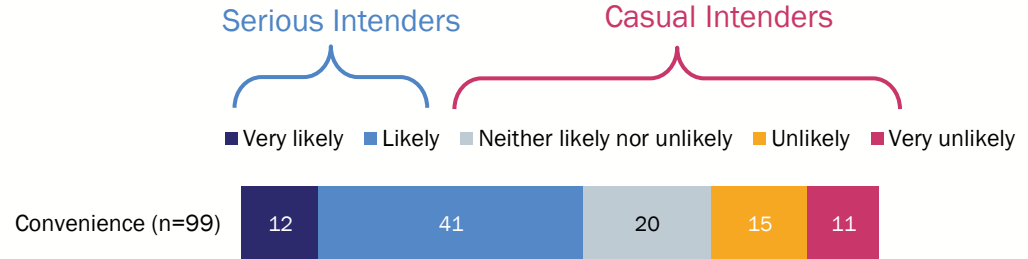
Convenience (n=237)

- **Defining characteristics:** more likely to value a pet's ease of care and inexpensiveness compared to other segments.
- **Preferred exotic taxa (Intenders):** turtle/tortoise, lizard, exotic rodent.
- They are the most likely to be Owners (58%), rather than Intenders (42%).
- This group is more likely to be male and to have children living in their residence.
- Convenience Owners and Intenders are the most likely to say that others are indifferent or opposed to exotic pets.
- They are the most likely group to find the practical challenges such as feeding difficulties and expense to be barriers in the way of owning an exotic pet.
- They are the least influenced by Social Networking Sites and are the least happy owning their exotic pets.
- They are the least likely to have visited a pet shop with exotic animals but the most frequent visitors to exotic animal cafés and exotic pet fairs.
- Least likely to be discouraged by the animal going extinct in the wild or disease transfer.

Exotic Pet Ownership – Among Convenience Segment (n=237) (%)



Likelihood to Buy in the Next 12 Months – Among Convenience Intenders (n=99) (%)



Segments of Exotic Pet Owners and Intenders

Among exotic pet Owners or Intenders, we identified three homogeneous segments (see page 92 - 93 for an explanation of the methodology). These segments share many perceptions, drivers, and attitudes toward pet ownership. Some aspects of pet ownership ranked similarly highly (e.g., great to spend time with) or equally low (e.g., the rarity), but others indicate a difference between the segments in their outlook about buying and owning pets.

Rational (n=215)

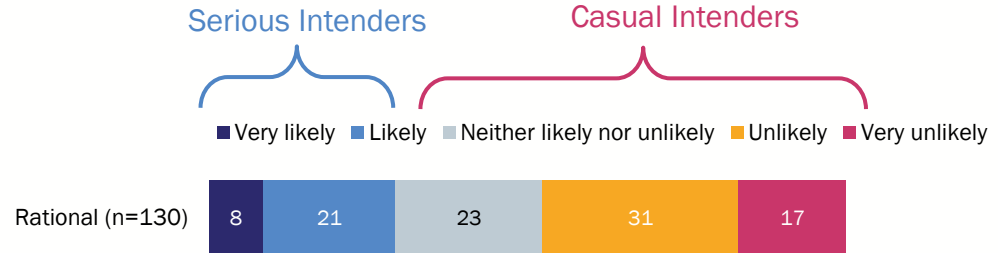
- **Defining characteristics:** more likely to value that the animal is accepted by friends / family, has good hygiene and is not endangered in the wild. They are the most likely segment to recognize that demand for exotic pets may lead to smuggling or pose extinction risks.
- **Preferred exotic taxa (Intenders):** Parrot, exotic rodent, lizard
- The majority of them are Intenders (60%), rather than owners (40%)
- They are the least likely to have bought their pet in the past 12 months and least likely to buy in the next 12 months.
- This group is the least likely to have been to an exotic pet fair.
- Rational Owners and Intenders are most likely to see exotic animal cafés as promoting the desire of rare species.
- They are the most likely to be discouraged by the potential issues such as the animal going extinct in the wild, illegality or smuggling.

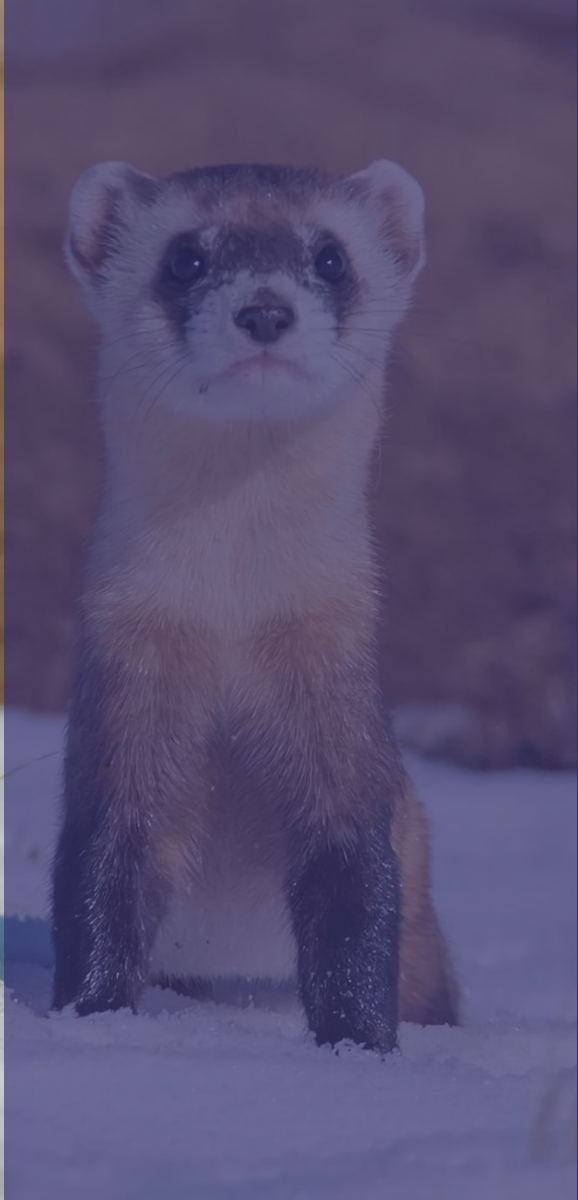
Exotic Pet Ownership – Among Rational Segment (n=215) (%)



Among Rational Intenders

Likelihood to Buy in the Next 12 Months – Among Rational Intenders (n=130) (%)





3.2 Current and Future Ownership of Exotic Pets

Ownership of Pets

From an initial sample of 16,000, it was established that 2% own exotic pets and 1% intend to buy them. From this sample 1,000 participants continued with the questionnaire. In this report, we refer to the 1,000 participants (see page 10).

Even among Non-owners, Non-intenders, the majority of participants had a pet growing up (75%). Four in ten Owners had an exotic pet growing up.

Insights from Qualitative Research

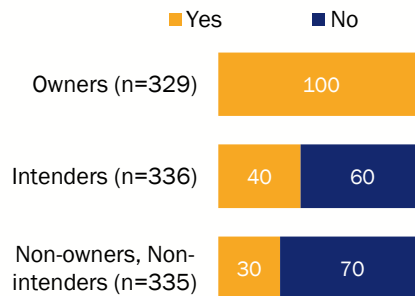
It is common for exotic pet owners to have grown up in an environment where they were close to animals. Many have had a pet in their home since childhood and their friends / acquaintances were animal lovers.

Quote from Qualitative Research

"I've grown up with pets all my life, and when I started working and living on my own, I immediately wanted to buy something! It just so happened that there was an exotic pet shop near my house."

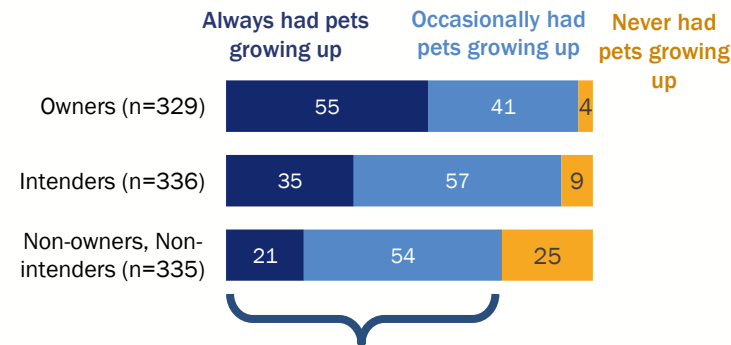
– Owner, Female (30s)

Current Ownership of Pets (Domestic or Exotic)*

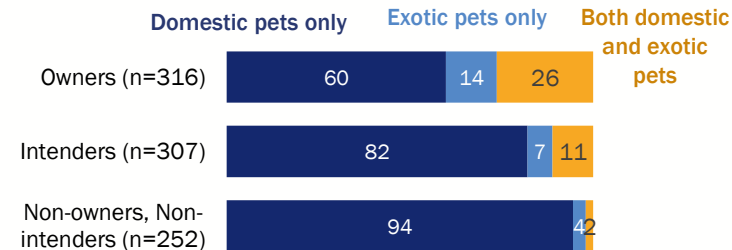


Ownership of Pets (Among All Participants, n=1,000) (%)

Owning Pets While Growing Up (Until the Age of 18)



Types of Pets Owned While Growing Up (Among Those Who Owned Pets While Growing Up)



*Note: Owners may own both exotic and domestic animals. Intenders and Non-owners, Non-intenders can only own domestic animals.

QS5. Do you own any pets (domestic or exotic)? QS6. Which of these most closely relates to your experience while growing up (until the age of 18)? Base: All participants, n=1,000

QS7. What kind of pets did you / your family have? Base: Participants who owned pets growing up, n=875

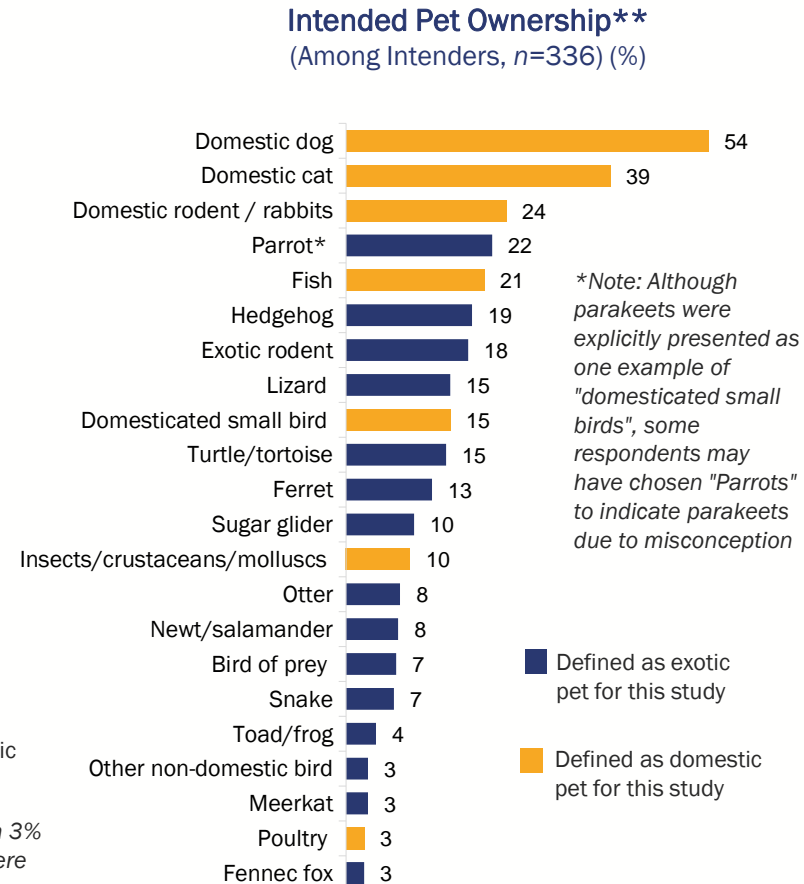
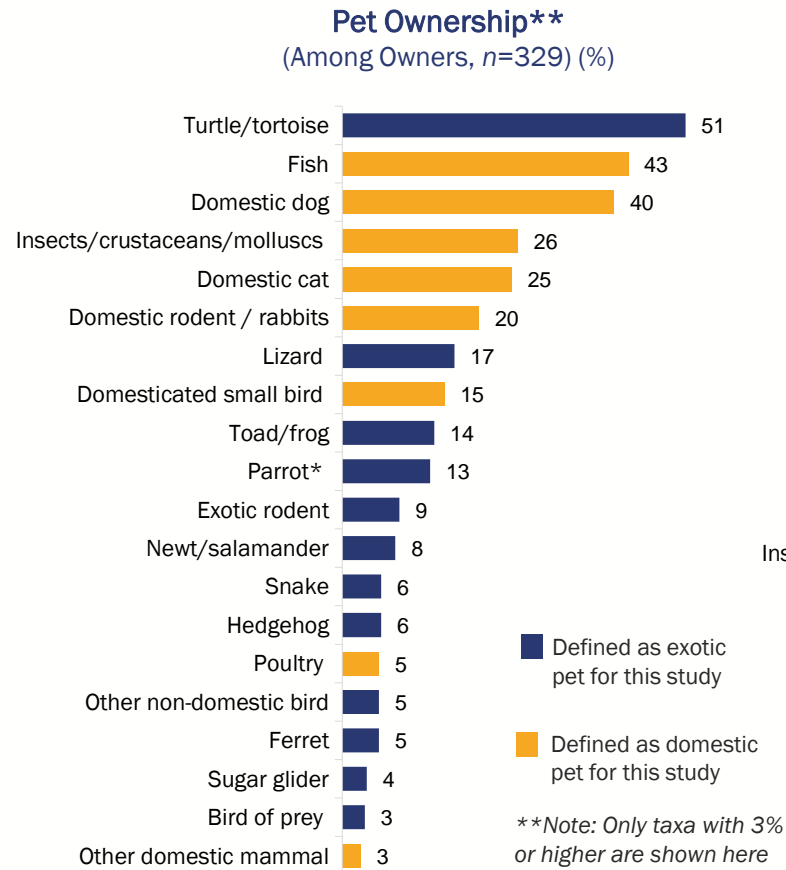
Domestic and Exotic Pets Owned and Intended to Own

Of the 16,000[†] consumers who answered the screener questions, 2 percent own exotic pets and 1 percent intend to own them (data not shown). Almost half own domestic pets (49%, data not shown).

Among Owners, tortoises/turtles are the most popular exotic species owned. Many Owners also own domestic pets, most commonly fish, dogs, invertebrates, and cats.

Participants who intend to buy exotic pets also intend to buy domestic pets. In terms of exotic pets, the greatest proportion intend to buy parrots, followed by hedgehogs.

Twenty-four percent of Owners intend to buy another exotic pet (data not shown).



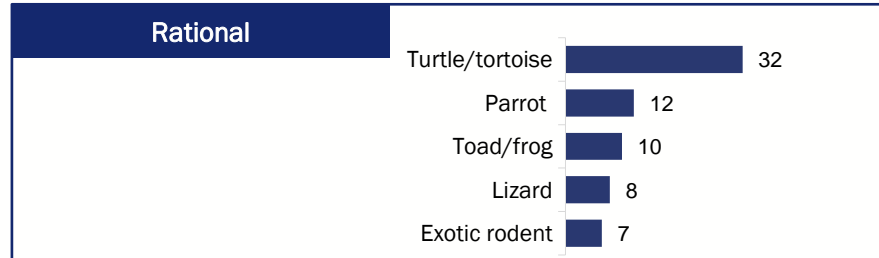
Exotic Pets Owned and Intended to Own, by Segment

Turtles and tortoises are the most-commonly owned exotic pet taxa among all three segments, but elsewhere, ownership and desire differ among segments.

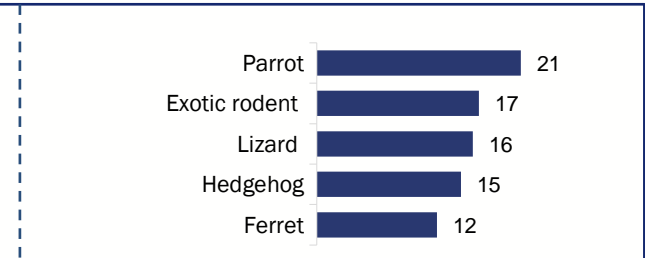
Emotional Bond Intenders are the most likely to want hedgehogs, while Convenience Intenders are the most likely to want snakes.

Rational Intenders show the highest rates of wanting domestic animals such as dogs and cats (data not shown)

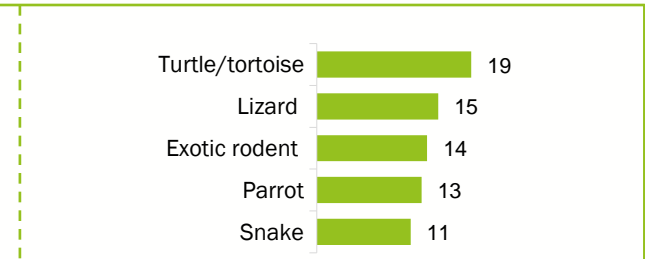
Exotic Pet Ownership (Top Five)
(Among Segments) (%)



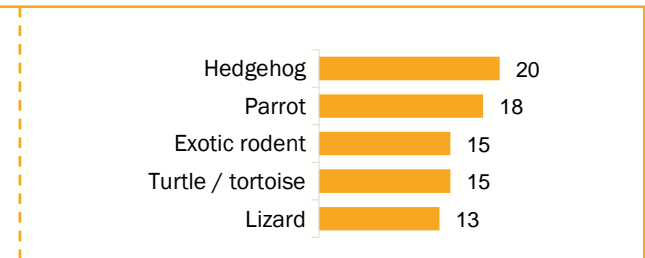
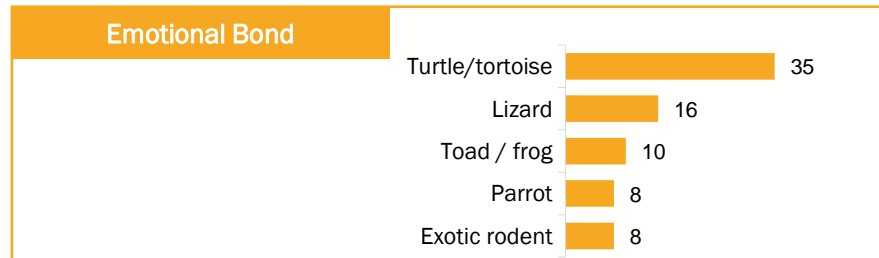
Exotic Pet Intention (Top Five)
(Among Segments) (%)



Convenience



Emotional Bond



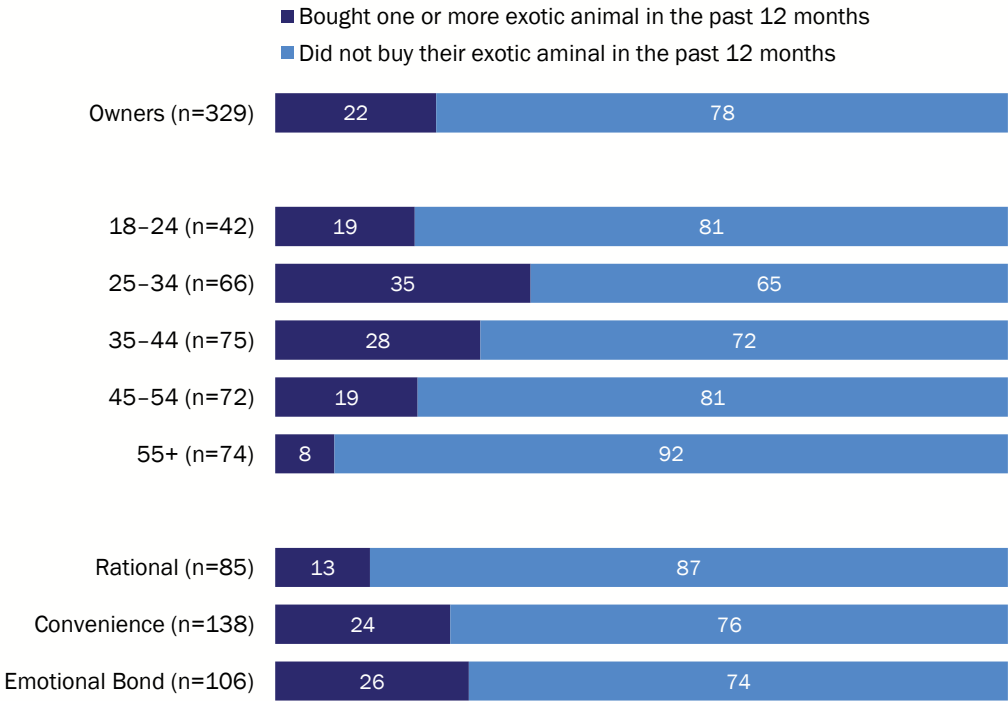
Purchase of Exotic Pets in the Past 12 Months

Among the participants who own an exotic pet, 22 percent bought it within the last 12 months.

The rate of recent purchase is lower among young Owners (18–24), is highest among 25–34-year-olds, and then decreases with age.

Rational Owners are the least likely to have bought their exotic pet in the last 12 months. Convenience Owners and Emotional Bond Owners are similarly likely to have bought their pet in the past 12 months.

Purchase of an Exotic Pet in the Last 12 Months
(Among Owners, n=329) (%)

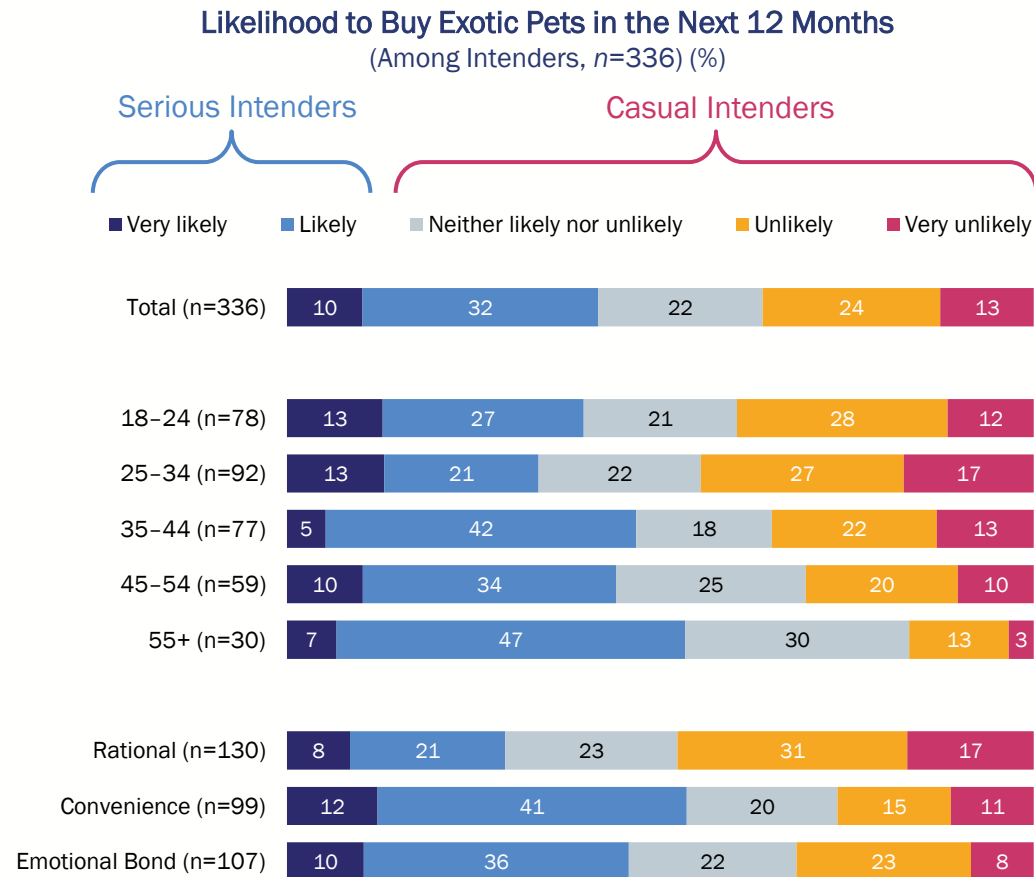


Likelihood to Buy an Exotic Pet in the Next 12 Months

Four in ten Intenders (42%) say they are likely or very likely to buy an exotic pet in the next 12 months, while 37 percent find it unlikely or very unlikely that they will buy one within this time frame.

Convenience and Emotional Bond Intenders are significantly more likely to buy an exotic pet in the next 12 months than Rational Intenders.

Exotic Mammal Intenders are significantly more likely to buy an exotic pet in the next 12 months than the other taxa (data not shown).





3.3 Drivers and Deterrents of Exotic Pet Purchase

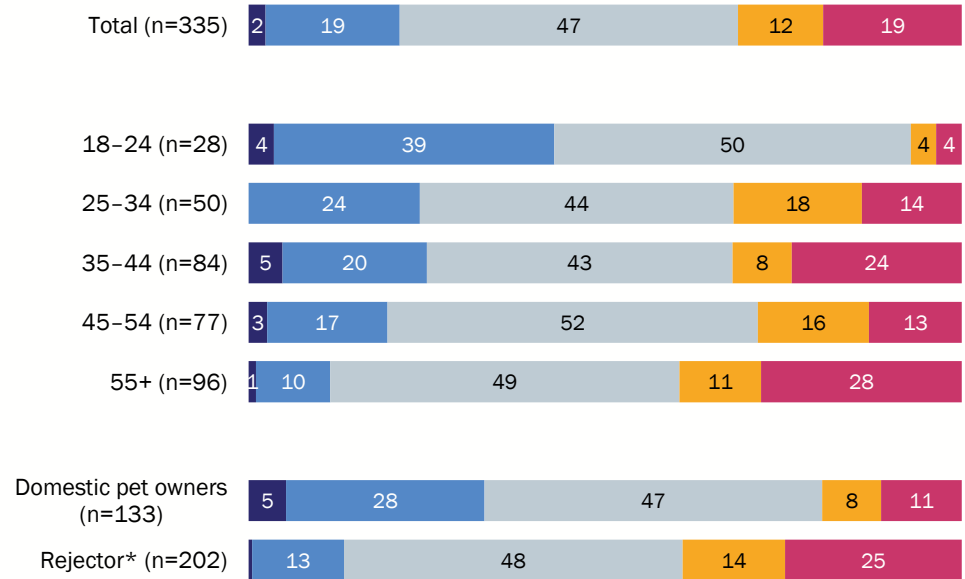
Attitudes toward Having Exotic Pets – Non-owners/Non-intenders

Positive attitudes toward the keeping of exotic pets declines with age among Non-owners/Non-intenders.

Almost half of Non-owners/Non-intenders (47%) are indifferent to the keeping of exotic pets. A greater proportion of this group (31%) oppose their keeping than support it (21%). Younger participants are less likely to oppose the keeping of exotic pets and are more likely to be in favor.

Participants' Attitudes
(Among Non-owners/Non-intenders, n=335) (%)

■ Very much in favor ■ Somewhat in favor ■ Indifferent ■ Somewhat opposed ■ Very much opposed



***Note: Rejectors do not own any pets and do not intend to buy any in the foreseeable future*

Attitudes toward Having Exotic Pets – Owners and Intenders

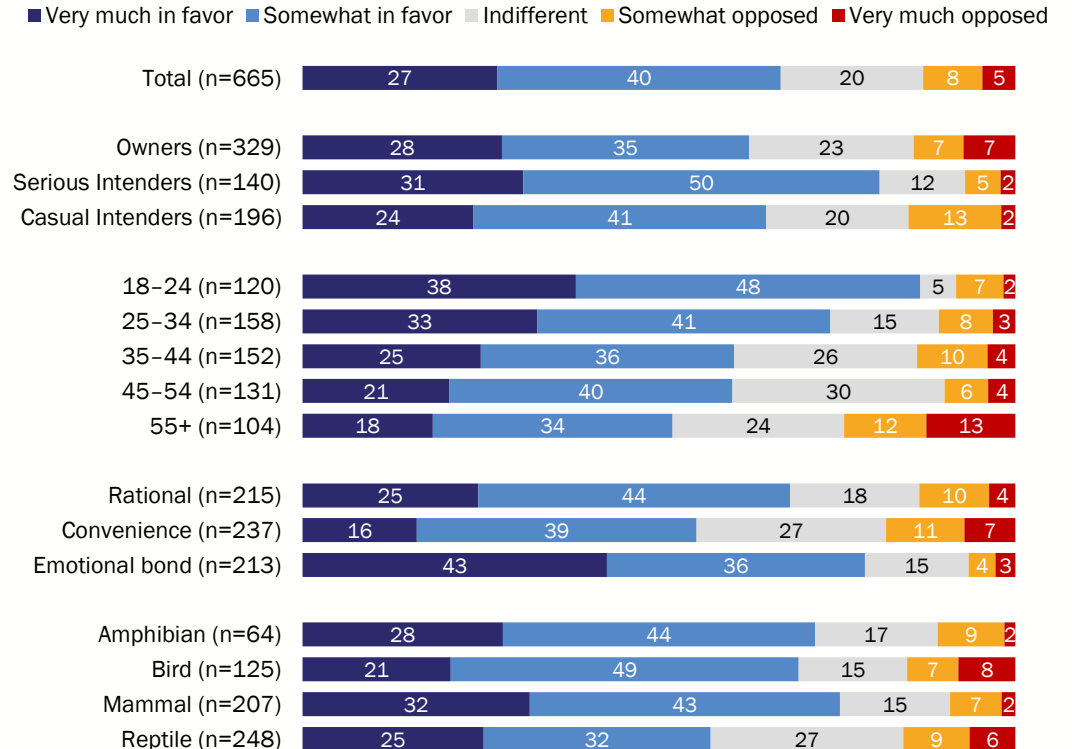
Younger participants perceive greater acceptance among their friends, family, and community.

Owners and Intenders perceive a high level of acceptance from their friends, family, and community, with 63 percent of Owners, 81 percent of Serious Intenders and 65 percent of Casual Intenders saying their connections are in favor of the exotic pets. Compared to the perceptions of Non-owners, Non-intenders (previous page), this indicates a higher level of positive feedback or perception from Owners and Intenders than is present among the general public. Positive attitudes correspond with age: younger Owners and Intenders are more likely to perceive/experience positive attitudes.

Reptile Owners/Intenders are significantly less likely to report that their family and friends are in favor.

Emotional Bond Owners / Intenders report the highest level of acceptance from their friends, family, and community.

Friends' and Families' Attitudes (Among Owners and Intenders, n=665) (%)



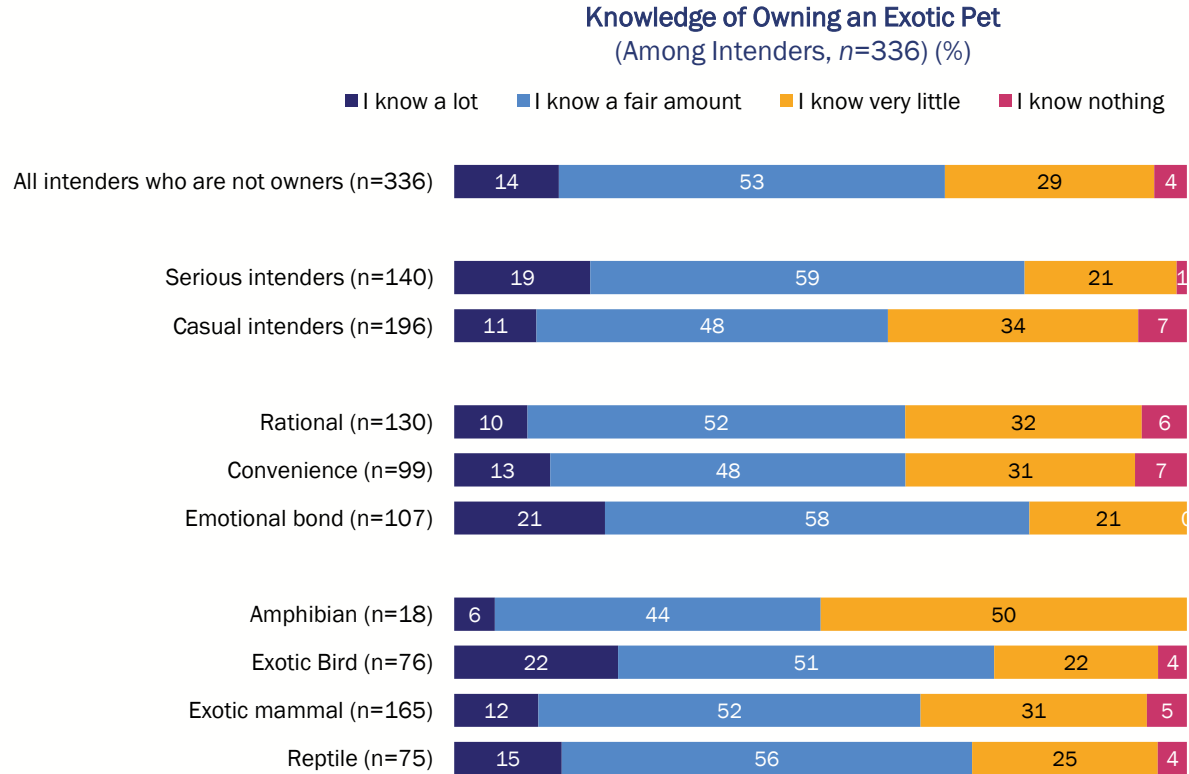
Knowledge of Requirements for Owning an Exotic Pet – Intenders

The majority of Intenders (67%) feel that they know a lot or a fair amount about owning the exotic pet they intend to buy (e.g., about the food, habitat, and cost requirements).*

A statistically significantly larger proportion of Serious Intenders say they know a lot or a fair amount about owning an exotic pet compared to Casual Intenders.

Emotional Bond Intenders report the most knowledge about owning an exotic pet.

Exotic Bird Intenders claim to know the most about owning an animal, followed by Exotic Reptile Intenders.



*Note: as this is a self-assessment, these Intenders may not know as much as they believe they do.

Q6. How much do you know about owning a [previously selected animal] as a pet? (e.g., about the food, environment, and cost requirements)

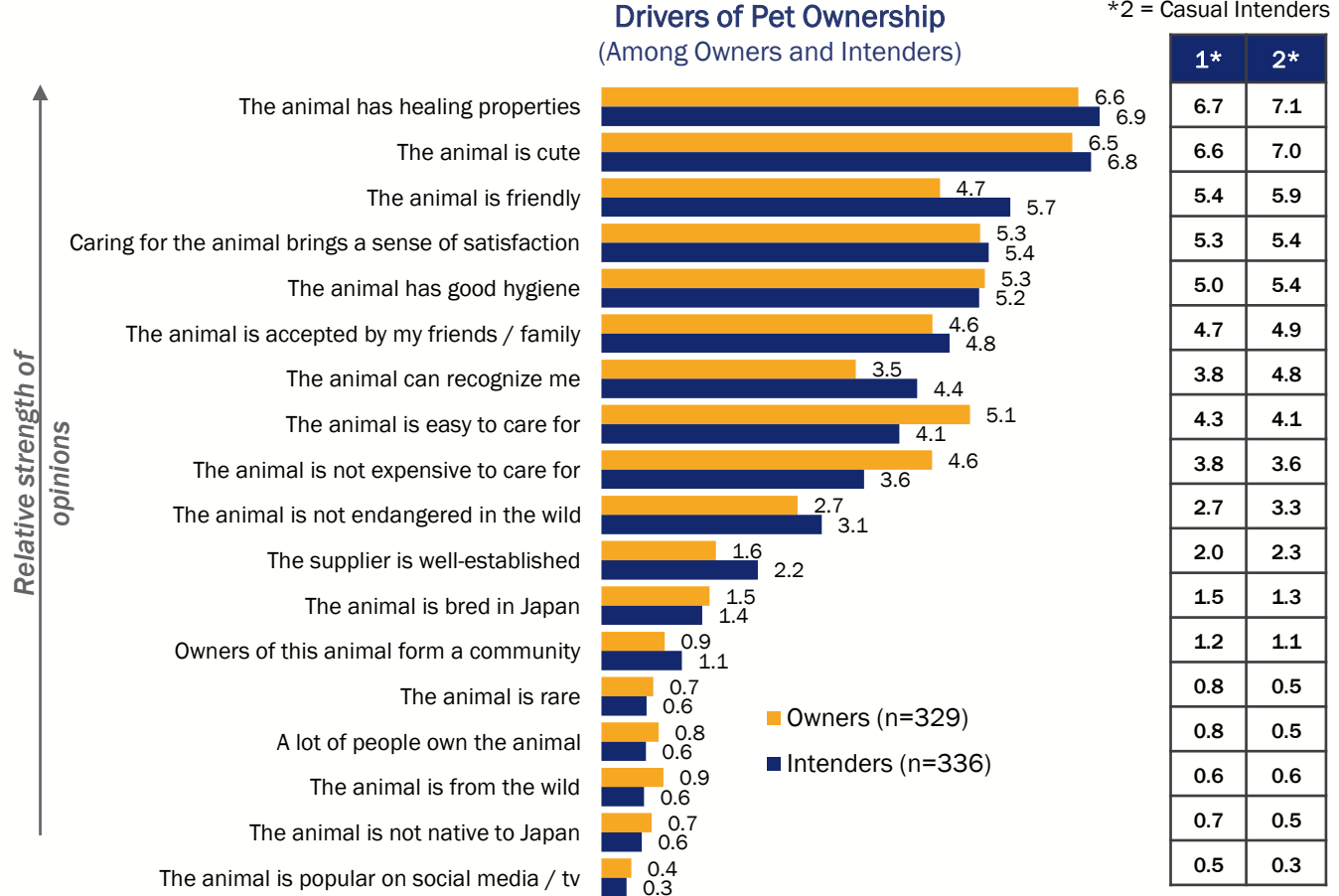
Base: Intenders, n=336

Drivers of Pet Ownership – Owners and Intenders

The top drivers of pet ownership among Owners and Intenders are similar. Both value the ideas of “iyashi” (the healing properties of the animal) and “kawaii” (the cuteness of the animal).

Factors such as rarity, wild origins, and origins outside of Japan are not highly ranked and are therefore not strongly held opinions.

Exotic pet Owners value the ease of care and lower expense of the animal significantly more than Intenders, while Intenders value the animal's friendliness and ability to recognize them significantly more than Owners.



Q7. Which of the following are the most important factors and the least important factors you consider when deciding to own a pet?

Results are scaled out of 10.

Base: Owners and Intenders, n=665

Drivers of Pet Ownership – Owners and Intenders, by Segment

The top drivers of pet ownership differ among the different segments. Higher numbers indicate the strength of how important each factor is.

Emotional Bond Owners / Intenders experience the strongest drivers

Convenience Owners / Intenders are driven by easiness to care for the animal and inexpensiveness of the animal to a greater degree than the other segments.

Domestic pet owners experience similar drivers to Rational and Emotional Bond Owners / Intenders.



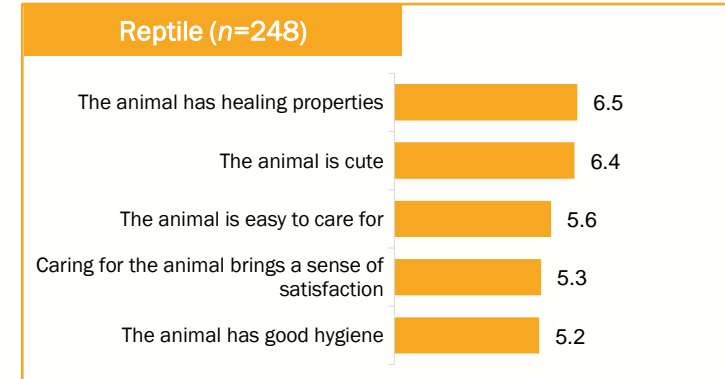
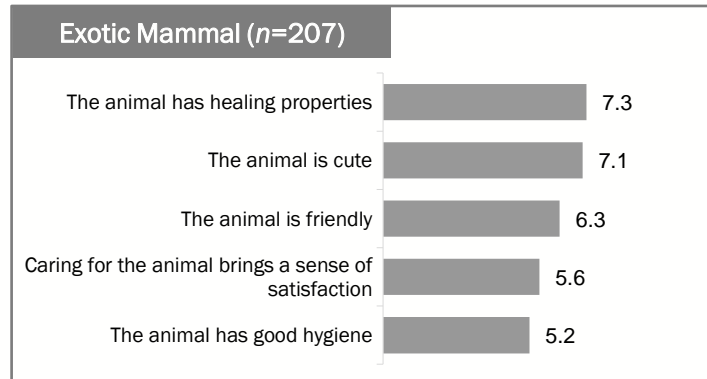
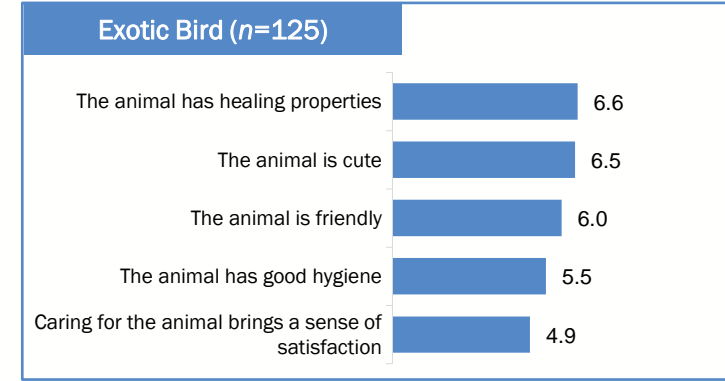
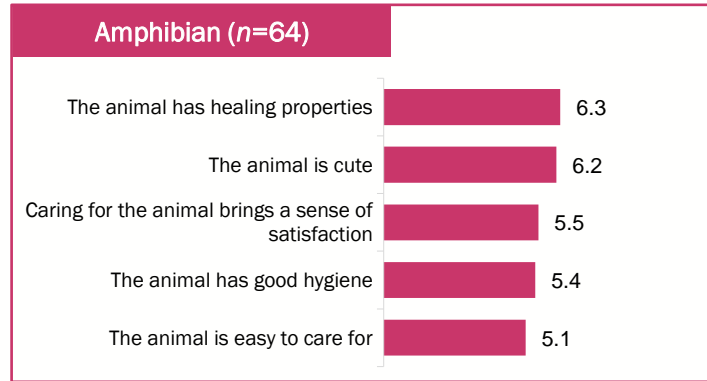
Drivers of Pet Ownership – Owners and Intenders, by Taxa

The drivers of pet ownership among different taxa are similar, though there are some differences in the strength of opinion and the order of importance.

Amphibian Owners or Intenders feel the most strongly about wanting the animal to not be endangered in the wild, and are least likely to find the animal's friendliness or its ability to recognize the owner important (data not shown).

Reptile and Amphibian Owners and Intenders value ease of care and expense more highly than other taxa (data not shown).

Friendliness and ability to recognize the owner are valued most highly in Mammal and Bird Owners and Intenders (data not shown).



Q7. Which of the following are the most important factors and the least important factors you consider when deciding to own a pet?

Results are scaled out of 10.

Base: Owners and Intenders, n=794

Insights From Qualitative Research – Motivations for owning exotic pets

Among the following motivations, 'desire for companionship' and 'be a good care giver' are stronger among the current owners while 'be independent & unique' and 'recognized as a part of the community' is more of an initial driver for interests.

Desire for companionship

- Most of the Owners / Intenders have experience in having a companionship with domestic animals. They seek the same companionship with exotic animals. They want to love and enjoy playing with them. For many owners, their exotic pets become an indispensable partner in their life.

Be a good care giver for 'non-human-friendly' animals

- There is a satisfaction in nurturing and providing care for something in their life. They perceive their exotic animals just like their child. Since exotic animals are seen as 'more challenging' compared to other common pets, there is a sense of conquering by normalizing 'non-human-friendly' animals to be their partner.
- They also want to provide a good home for the animals they have seen in the pet shops. There is a sense of 'rescue' in purchasing exotic pets from the pet shops because having a good confident owner could provide a better home and care for the pets.

Be independent and unique

- Rarity of their exotic animals exemplifies how unique and independent the owner is. There is a sense of pride in choosing such a unique, rare pet which many people wouldn't be considering.
- This is present in many exotic pet owners/intenders, but stronger for Reptile owners

Recognized as a s part of community in social media

- Having seen many posts on exotic animals (e.g., hedgehogs) on Instagram, their interest is triggered for exotic pets. For some, the underlying motivation for the interests seems to be not just about the animals, but also about a being a part of community which is seen as a trend.
- As young people in their 20's spend more time on social media, this is more common motivation among young intenders. The popularity on social media gives a sense of 'social acceptance'.

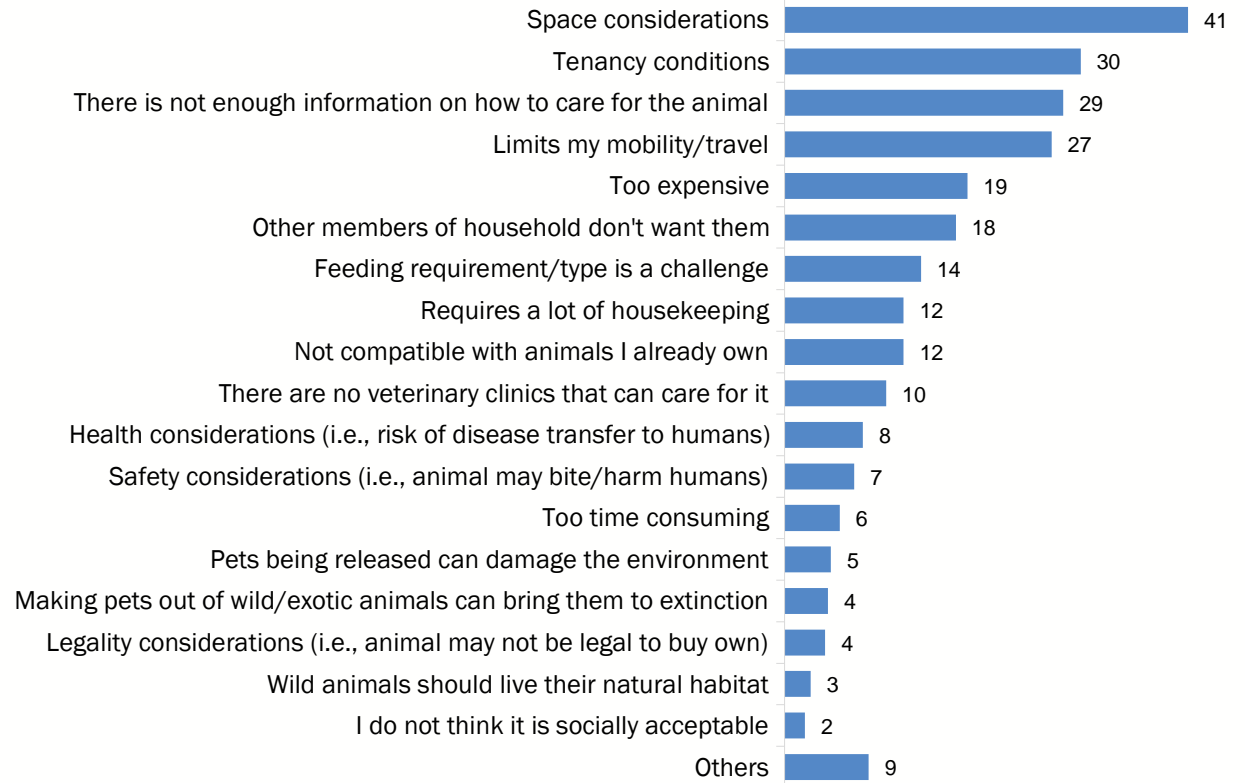
Reasons for Not Currently Owning a Pet – Intenders

Among Intenders, the primary reason they have not already bought an exotic pet is because of space considerations.

Quote from Qualitative Research

"[One barrier is] the fact that I have to feed them worms. When I asked at the pet shop what kind of food they eat, I was told that I had to give them worms for their health, but I hate worms."
– Owner, Female (20s)

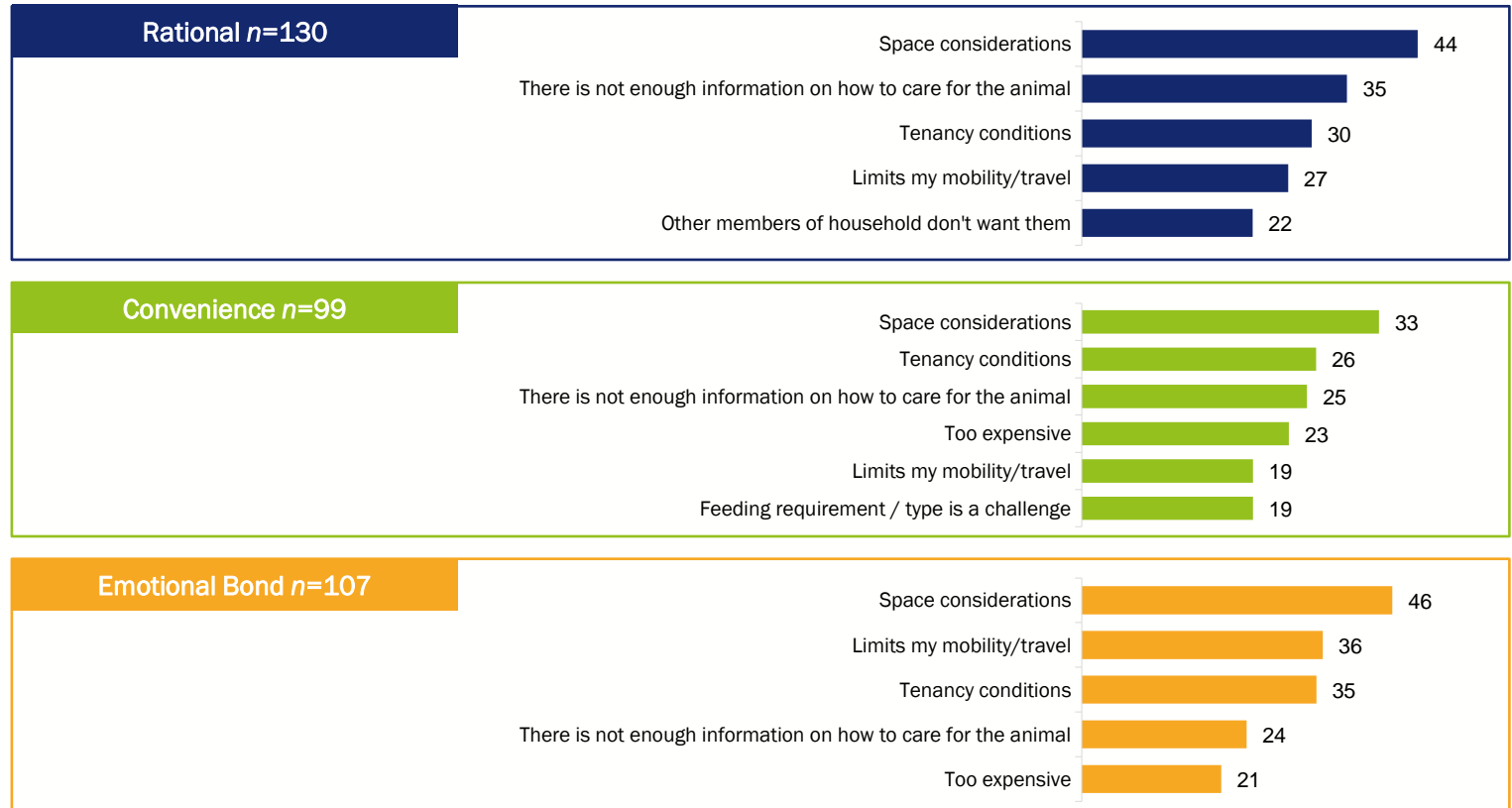
Reasons Not to Currently Own an Exotic Pet (Among Intenders n=336)



Reasons for Not Currently Owning a Pet – Intenders, by Segment

Space considerations are the primary deterrent for all three groups.

Emotional Bond Intenders are significantly more likely to cite mobility / travel concerns compared to the other segments.



Reasons for Not Currently Owning a Pet – Intenders, by Taxa

The top five reasons why Intenders have not yet bought exotic animals are similar, though the order of importance of each obstacle differs.

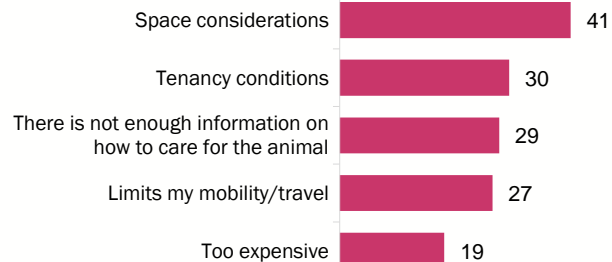
Space considerations is the primary obstacle for all taxa. Intenders who want exotic mammals are significantly more likely to encounter tenancy restrictions than exotic reptile intenders, while Exotic Mammal Intenders are more likely to cite a lack of available information compared to other groups.

Quote from Qualitative Research

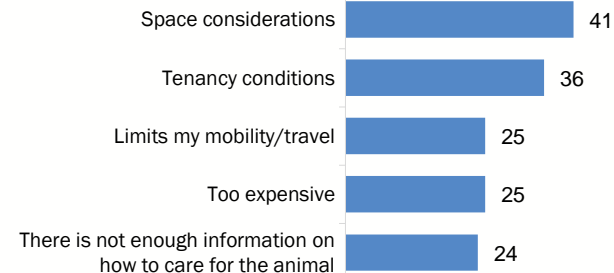
"My mother's objection: she hated hamsters and told me to go back to the shop and so on. She also screamed at me when she saw a degu."

– Owner, Male (30s)

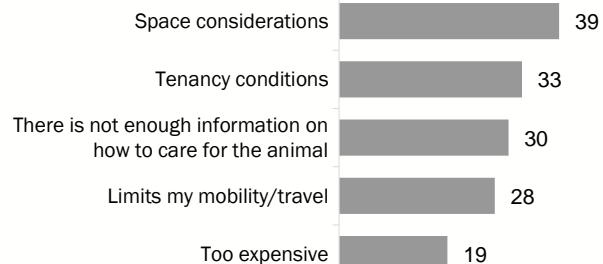
Amphibian (n=18)*



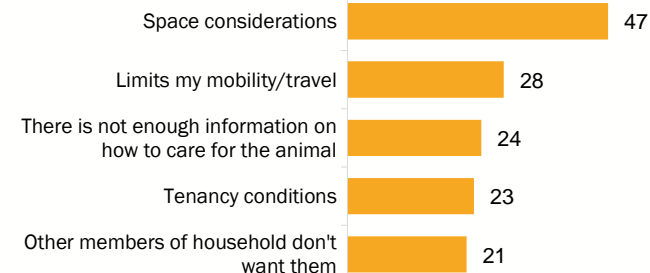
Exotic Bird (n=76)



Exotic Mammal (n=165)



Reptile (n=75)



*Small sample size

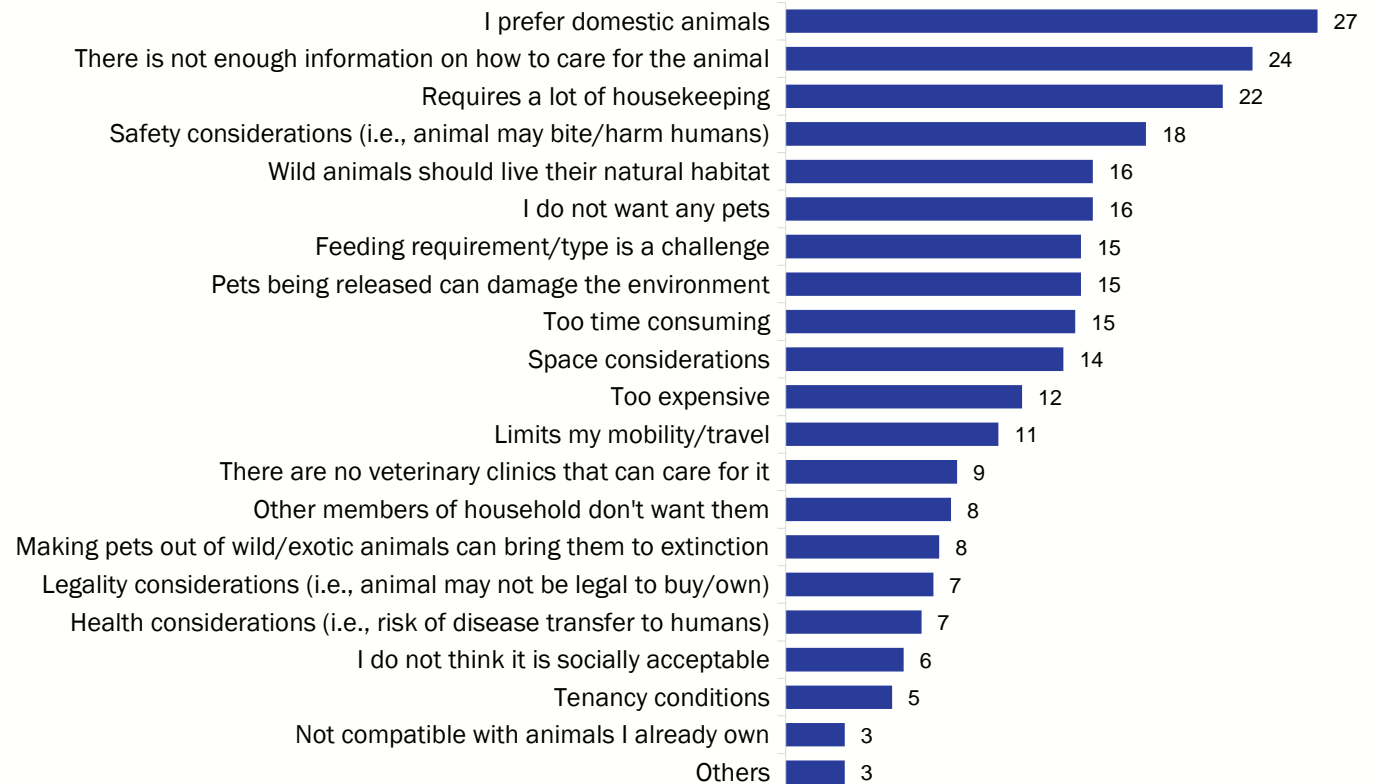
Reasons for Not Currently Owning a Pet – Non-owners/Non-intenders

Among Non-owners/Non-intenders, the primary reason that they do not want an exotic pet is a preference for domestic pets.

A lack of information on how to care for the animal also ranks highly as a reason they would not like to own any exotic pets, similar to Intenders (page 36). However, space and tenancy restrictions do not rank as highly as they do for Intenders.

Non-Owners/Non-Intenders are more likely to note reasons such as “wild animals should live in their natural habitat” and “pets being released can damage the environment” than Intenders.

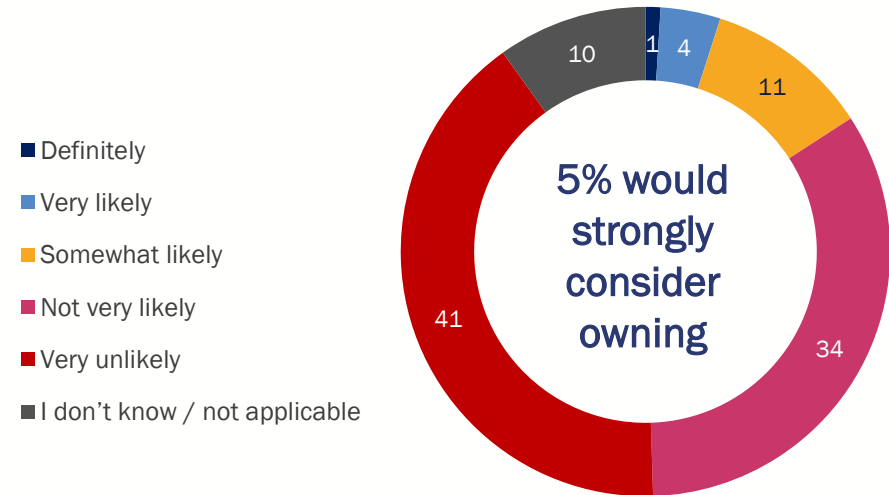
Reasons Not to Own an Exotic Pet
(Among Non-owners/Non-intenders n=335)



Likelihood to Consider Owning an Exotic Pet if Concerns Changed

Among Non-Owners/Non-Intenders who are not against having a pet, a large majority (75%) do not foresee a situation where they would change their minds and want to own an exotic pet.

Likelihood of Considering Owning an Exotic Pet if Concerns Changed
(Among Non-owners/Non-intenders, n=310) (%)



Influences on Exotic Pet Ownership – Owners and Intenders, Age Breakdown

Younger Owners and Intenders are more influenced by photos and videos on social networking sites/YouTube, while older Owners and Intenders are influenced more by their family and relatives.









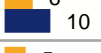


Pet shops are a strong influence for all age groups and taxa (see next page).

Intenders are more likely that they are influenced by SNS / YouTube and by TV, while owners are more likely to be influenced by their family / relatives.

Insights from Qualitative Research

General information and tips for specific exotic pets are mainly found on “curated” sites or websites of cafés. More detailed information is gathered from SNS. Owners actively follow specific accounts that have the same exotic pets.

Influence Factors on Exotic Pet Ownership
(Among Owners and Intenders, n=665) (%)

	Ownership status		18–24	25–34	35–44	45–54	55+
			(n=120)	(n=158)	(n=152)	(n=131)	(n=104)
1	My family / relatives		31	27	33	48	43
2	Pet shops		58	38	28	24	22
3	Photos and Videos on SNS/YouTube		32	21	28	30	26
4	I have always wanted one		30	24	23	24	22
5	My friends		22	27	22	15	14
6	My partner		23	15	17	24	17
7	TV		22	17	16	18	19
8	Pet fairs		8	17	12	9	8
9	Pet cafes		11	13	7	4	3
10	Celebrities / influencers		6	8	5	3	2
11	I don't know		9	16	18	18	20

■ Owners (n=329) ■ Intenders (n=336)

■ Top three reasons per age group

Influences on Exotic Pet Ownership – Owners and Intenders, Taxa Breakdown

The top influencing factors are similar among the Owners and Intenders of different taxa.

Reptile Owners/Intenders are significantly more likely to be influenced by their family and relatives than the other segments.

Exotic mammal Owners/Intenders are significantly more likely to be influenced by SNS and TV than the other segments.

Quote from Qualitative Research

"I went to a pet shop and saw a real pet because it was the cutest thing I'd ever seen. I also heard that they are very affectionate with the shop staff, which is why I was attracted to them."

- Owner, Male (20s) Decision period: 1 day

Influence Factors on Exotic Pet Ownership
(Among Owners and Intenders, n=665) (%)

	Ownership status		Amphibians	Birds	Mammals	Reptiles
			(n=158)	(n=152)	(n=131)	(n=104)
1	My family / relatives	43 29	31	34	26	48
2	Pet shops	27 27	34	26	46	27
3	Photos and videos on SNS/YouTube	22 45	25	25	26	29
4	I have always wanted one	21 21	23	26	31	20
5	My friends	18 20	22	18	23	20
6	My partner	18 18	14	18	18	22
7	TV	18 32	19	22	19	15
8	Pet fairs	12 10	13	13	13	9
9	Pet cafes	6 10	9	10	9	5
10	Celebrities / influencers	5 6	3	6	6	4
11	I don't know	21 12	19	20	11	17

■ Owners (n=329) ■ Intenders (n=336)

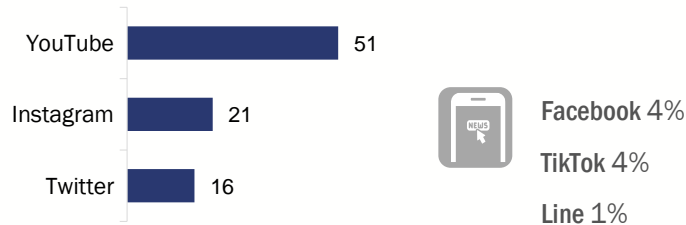
■ Top three reasons per age group

Influences on Exotic Pet Ownership – Social Networking Sites (SNS) / TV

Younger Owners and Intenders aged 18–24 are significantly more likely to cite Twitter as the influencing SNS site (26%) compared to the other age groups, though YouTube is still the most influential SNS channel for this group (data not shown).

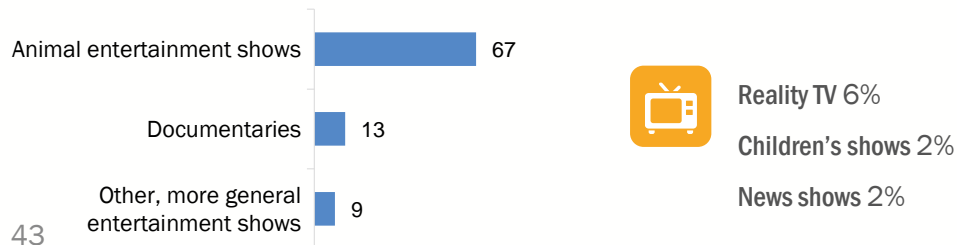
Influential Social Networking Sites (SNS)

(Among Participants Influenced by SNS/YouTube, n=226) (%)



Influential TV Shows

(Among Participants Influenced by TV, n=164) (%)



Insights from Qualitative Research

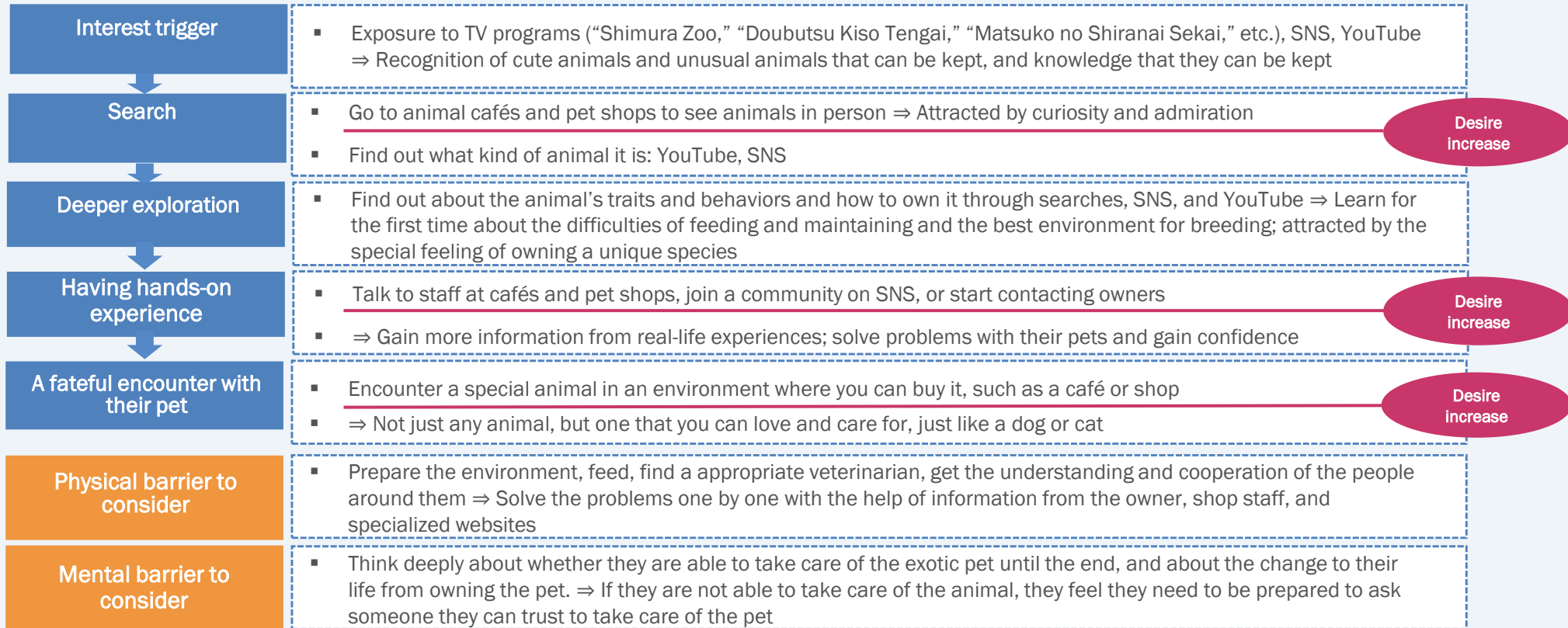
The initial interest in exotic pets is triggered by cuteness and healing. However, it is the experience of seeing and interacting with exotic pets that encourages people to take a step toward owning them. Information from shop assistants at pet shops and cafés is a big influence in making the decision.

The information available, including on TV, YouTube, and social networking sites, is focused on the cuteness of exotic animals and the pleasure of keeping them. It is an effective way to get people interested. Once people are interested, pet shops and to a lesser extent animal cafés have a strong role in making them take the next step.

- Touching a pet makes them feel its loveliness and healing power, and hearing advice from the shop assistants on how to care for the animal leads to deeper exploration.
- Many owners are told by pet shop staff that their pets are easy to keep, which lowers the barrier to purchase and encourages them to consider keeping their pets.
- For Intenders, the lack of a nearby place to interact with the animals or the inability to go to a café during COVID-19 restrictions has led to a reluctance to buy or a postponement of buying exotic pets. This shows that “contact” and information from shopkeepers are strong drivers of purchase.

Insights From Qualitative Research – the Journey to Ownership

Shopkeepers and current owners can be contacted on SNSs. During this process, the contact with exotic animals continues and the attachment to the species is strengthened.



Factors Which Discourage Exotic Pet Ownership – Intenders and Owners Who Intend to Buy Another Exotic Animal

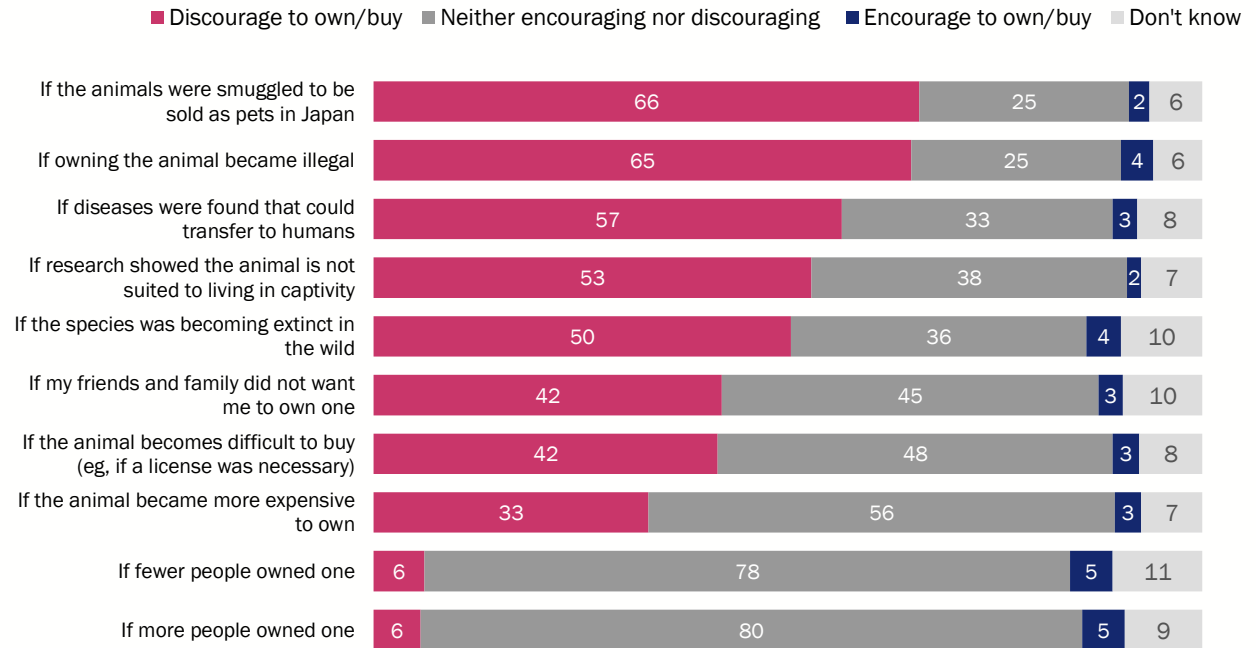
Two-thirds of those who intend to buy an exotic pet in the future (i.e., Intenders and Owners who intend to buy another exotic pet) would be discouraged from owning an exotic pet if they were aware that the animals were smuggled into Japan or if the animals became illegal to own.

More than half of those who plan to buy an exotic pet in the future (57%) would be discouraged by the potential transmission of zoonotic diseases and approximately half say they would be discouraged by welfare or extinction risk.

An increase in the expense of owning the animal discourages only one-third of those who plan to buy an exotic pet, and a large majority are unaffected by the popularity of the pet among other owners.

A small percentage of participants would value the rarity (i.e., rarity among other owners and rarity in the wild) and the potential illegality of owning a certain species.

Discouraging Factors for Owning an Exotic Pet
(Among Intenders and Owners Who Intend to Buy Another Exotic Animal, n=407) (%)



Factors Which Discourage Exotic Pet Ownership – Intenders and Owners, Who Intend to Buy Another Exotic Animal, by Segment

Discouraging Factors for Owning an Exotic Pet

(Among Intenders and Owners Who Intend to Buy Another Exotic Animal, n=407) (%)

Factors which discourage exotic pet ownership are similar across different groups, but the strength of this discouragement differs among Owners and Intenders and by segment.

Intenders who do not already own an exotic pet and Rational Intenders report a higher level of discouragement from almost all factors than those who already own one.

Exotic Mammal Intenders are the most swayed by potential illegality (data not shown). Other differences between Intenders of different taxa are minimal (data not shown).

Quote from Qualitative Research

"Dogs and cats can get zoonotic diseases too, so that's not a direct reason not to keep the exotic pets."
– Owner, Female (20s)

	Those who intend to buy exotic pets (n=407)	Owners (n=71)	Intenders (n=336)	Rational (n=146)	Convenience (n=125)	Emotional (n=136)
1 If the animals were smuggled to be sold as pets in Japan	66	54	68	83	46	65
2 If owning the animal became illegal	65	49	68	83	42	67
3 If diseases were found that could transfer to humans	57	45	59	69	40	58
4 If research showed the animal is not suited to living in captivity	53	38	56	67	35	54
5 If the species was becoming extinct in the wild	50	45	51	68	33	47
6 If my friends and family did not want me to own one	42	34	44	51	28	45
7 If the animal becomes difficult to buy (e.g., if a license was necessary)	42	28	44	53	30	40
8 If the animal became more expensive to own	33	21	36	40	27	32
9 If fewer people owned one	6	3	7	9	2	7
10 If more people owned one	6	7	5	4	8	5

Top three reasons per age group

Insights From Qualitative Research – Factors Which Discourage Exotic Pet Ownership

Of the scenarios presented, “smuggling and a risk of extinction” is the most likely scenario to make Owners and Intenders reconsider owning exotic pets. “Physical and emotional stress for the pets” is the scenario that many owners think would not apply to their own pets. Both Owners and Intenders feel that these factors are not problems that they can change, but that need to be addressed on the seller side (i.e., pet shops and cafés).

Scenarios	Relevance for Owners/ Intenders	Reasoning
Extinction risk and smuggling	Medium	<ul style="list-style-type: none">• Most are not aware of this fact and possibility. If they knew that the animal was an endangered species or was smuggled, many say they would not want to keep a new one. However, research shows that there is a limit to how much of an effect awareness raising has on exotic pet intenders (page 6) because they do not see these issues as relevant to their own pet.• Some Intenders feel the dilemma of understanding and wanting to save the animals in the shops by buying them rather than having them die at the shop.
Physical and emotional stress	Low/medium	<ul style="list-style-type: none">• Owners pride themselves on doing their utmost to create a stress-free environment for their pet, and even if this scenario were true, it would be difficult to accept.• Intenders believe that even if this is the case, it can be solved with love and affection and is not a scenario that would deter them from owning an exotic pet.
Impact on the ecosystem	Very low	<ul style="list-style-type: none">• It is understood that is not a deterrent for owning the animals, but that all would-be owners should have the right information about taking care of their pets.• They feel that it would be effective not only to collect information about the issue by oneself, but also to distribute booklets from the sales side.
Risk of infection	Very low	<ul style="list-style-type: none">• Regardless of the exotic animal, zoonotic diseases such as rabies exist and, depending on the species, can be solved with initial medication. Therefore, the participants do not see this scenario as a direct reason not to own an exotic animal.

Most Trustworthy Messengers – Owners and Intenders

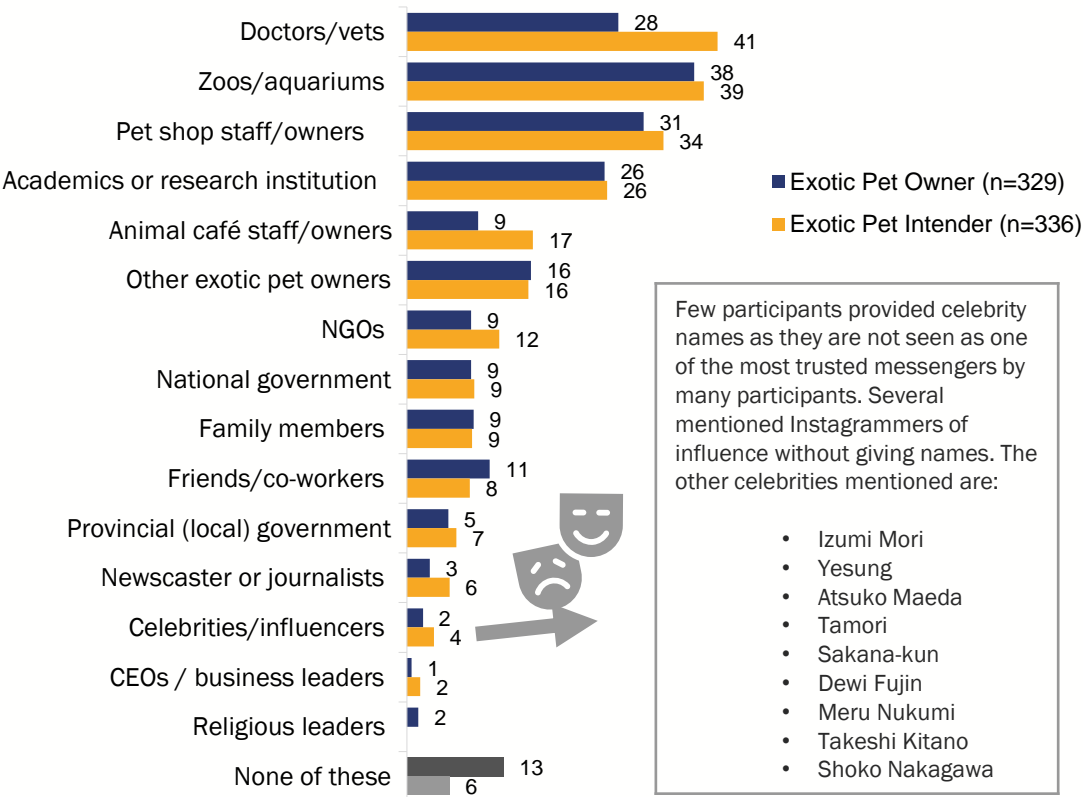
The most trusted perceived messengers for information about exotic pets by both Intenders and Owners are doctors/vets, zoos/aquariums, and pet shop staff/owners, though the order in which they are mentioned differs.

Owners are significantly more likely to trust doctors and vets than Intenders are, while young people (18–24) are most likely to trust pet shop staff/owners (39%, data not shown). Although celebrities and influencers are named by some participants, the small sample size precludes detailed analysis.

Quote from Qualitative Research

“Pet shop staff only say good things about pets based on the premise of selling them. The disadvantages should also be communicated properly.”
– Owner, Male (20s)

Most Trusted Messengers
(Among Owners and Intenders, n=665) (%)



*1 = Serious Intenders
*2 = Casual Intenders

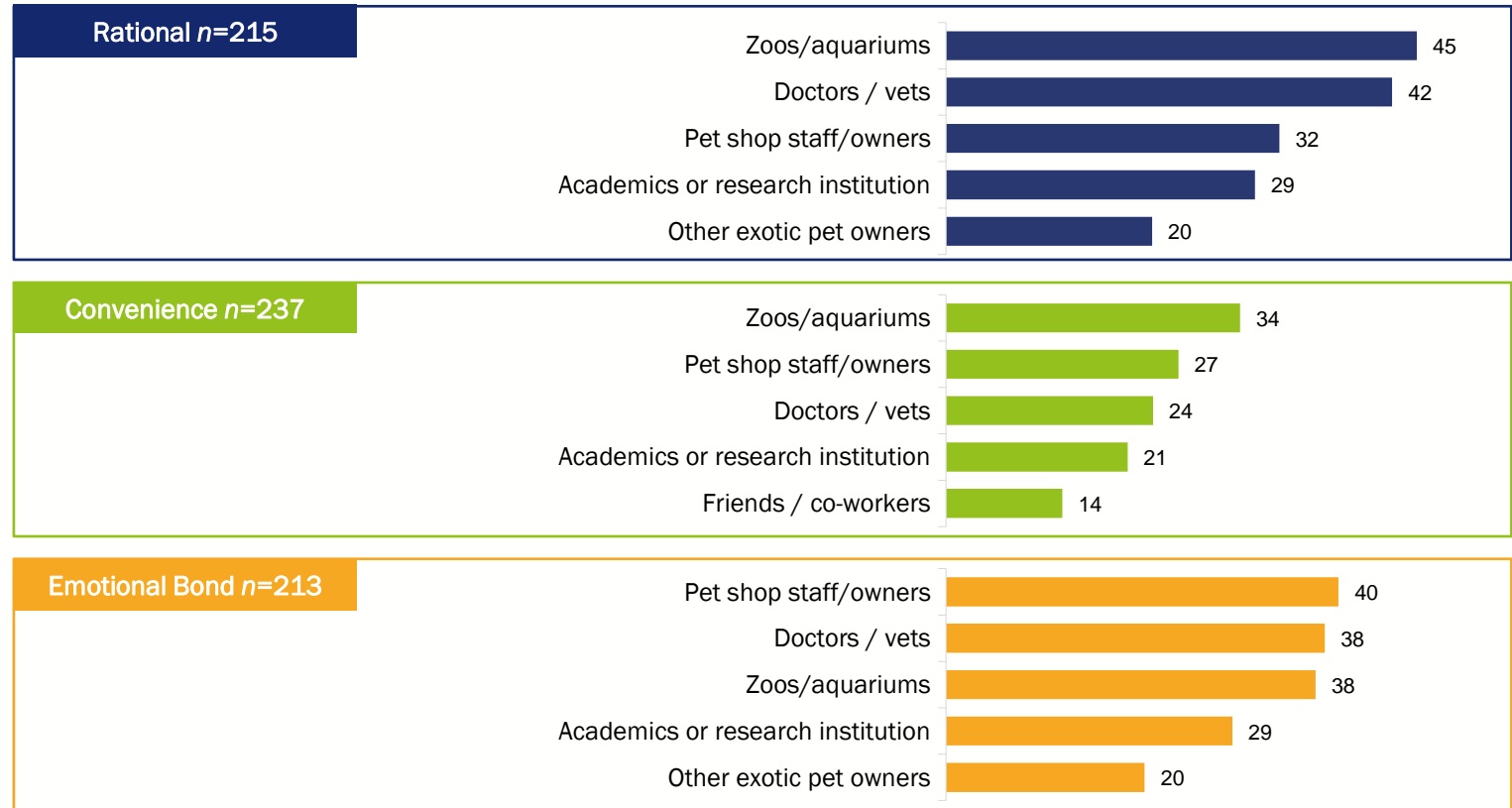
1*	2*
34	46
37	41
33	35
24	29
19	15
13	18
14	11
11	8
10	8
11	7
8	6
6	6
4	4
3	1
0	0
4	7

Most Trustworthy Messengers – Owners and Intenders, by Segment

Segments find similar sources of information trustworthy. Doctors/vets, zoos/aquariums, and pet shop staff feature highly for all three groups.

Emotional Bond Owners and Intenders have higher trust in pet shop stall / owners than the other segments.

Convenience Owners / Intenders have the least overall trust in information sources.





3.4 Experience of Owning Pets and Impression on Pet Owners

Happiness with Exotic Pet Ownership – Owners

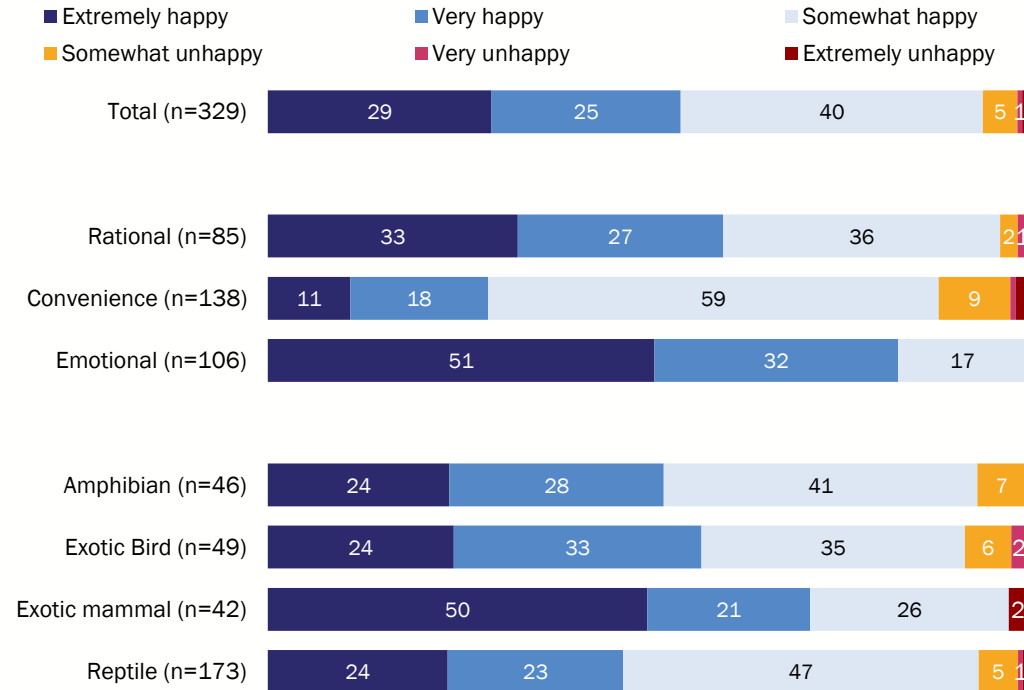
The vast majority of Owners (94%) are happy owning their exotic pet.

Among the segments, the level of happiness is highest for Emotional Bond Owners, 83 percent of whom say they are “very” or “extremely happy” and significantly lower for Convenience Owners, with 29 percent saying they are “very” or “extremely happy.”

Exotic Mammal Owners report the highest level of happiness with their pet.

Due to a low number of participants saying they are unhappy with their exotic animal, responses cannot be analyzed in depth. Reasons given by those who are not happy with their exotic pet are the odor, the difficulty in raising them (changing the water, cleaning the cages), the time required to devote to it, being required to keep insects for food, and because the animal is not cute.

Happiness with Owning an Exotic Pet
(Among Owners, n=329) (%)



Recommending an Exotic Pet to Others – Owners

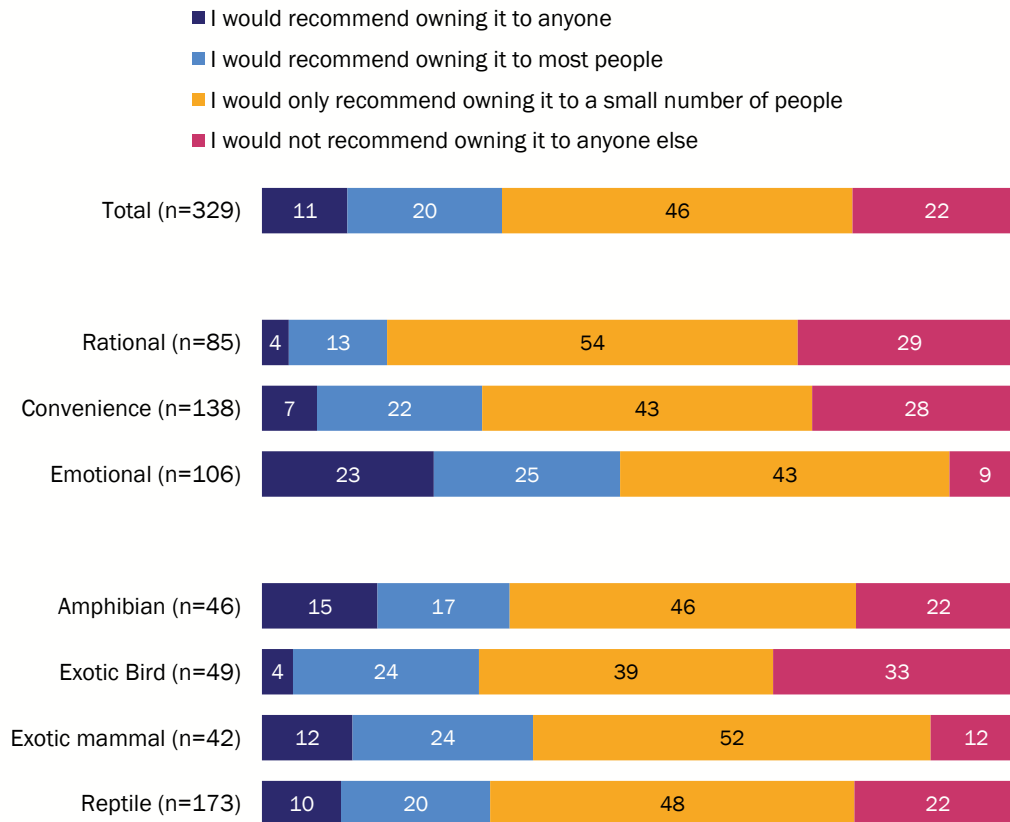
Although people are happy overall with their exotic pets, the majority acknowledges that not everyone should own them.

The largest proportion of pet owners (46%) would only recommend owning the exotic pet that they own to a small number of people, and 22 percent would not recommend owning it to anyone else.

Rational Owners are the least likely segment to recommend owning their pet to other people, while almost half of Emotional Bond Owners would recommend their exotic pet to most or all people.

Exotic Bird Owners are the least likely Owners to recommend owning an exotic bird to other people, with one-third saying they would not recommend owning one to anyone else.

Recommending an Exotic Pet to Others
(Among Owners, n=329) (%)

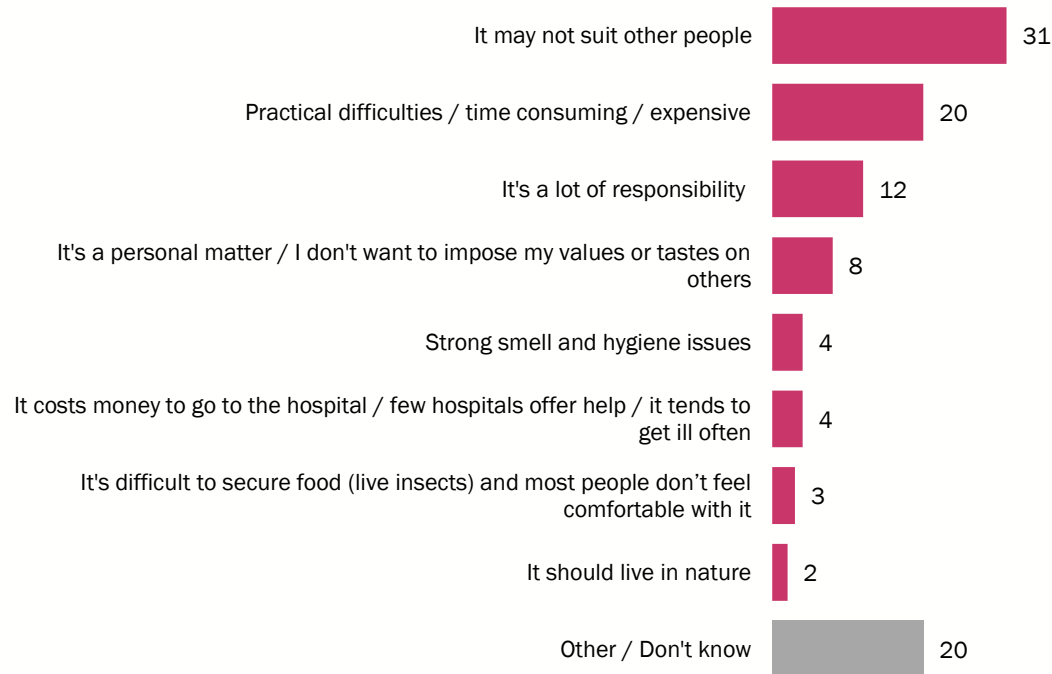


Reasons for Not Recommending an Exotic Pet – Owners

Owners acknowledge that the pet that they own may not be suitable for everyone.

When asked why they would not recommend the pet that they own to everyone/anyone, Owners mention that different people have different desires and not everyone might like the animal. Owners also note the practical difficulties such as cleaning, water management, temperature control, etc. and the time and expense. Owners also note that buying the animal is a responsibility that not everyone may be prepared for.

Reasons for Not Recommending an Exotic Pet
(Among Owners who would not recommend an exotic pet to everyone, n=225) (%)



Experience of Exotic Pet Ownership – Owners

Agreement with positive statements (drivers) about owning an exotic pet is higher than agreement with negative statements (deterrents), though some negative attributes also resonate with Owners.

Acknowledgement that the demand for exotic pets may lead to smuggling from overseas is the deterrent that is most agreed upon by Owners.

Insights from Qualitative Research

When prompted, Owners and Intenders think the issues mentioned are relevant for exotic species in general but do not see them as issues relating to their particular pet.

Among the following issues, which is relevant to your exotic pet? (Non-native species / animal welfare / zoonoses / smuggling / endangered species)

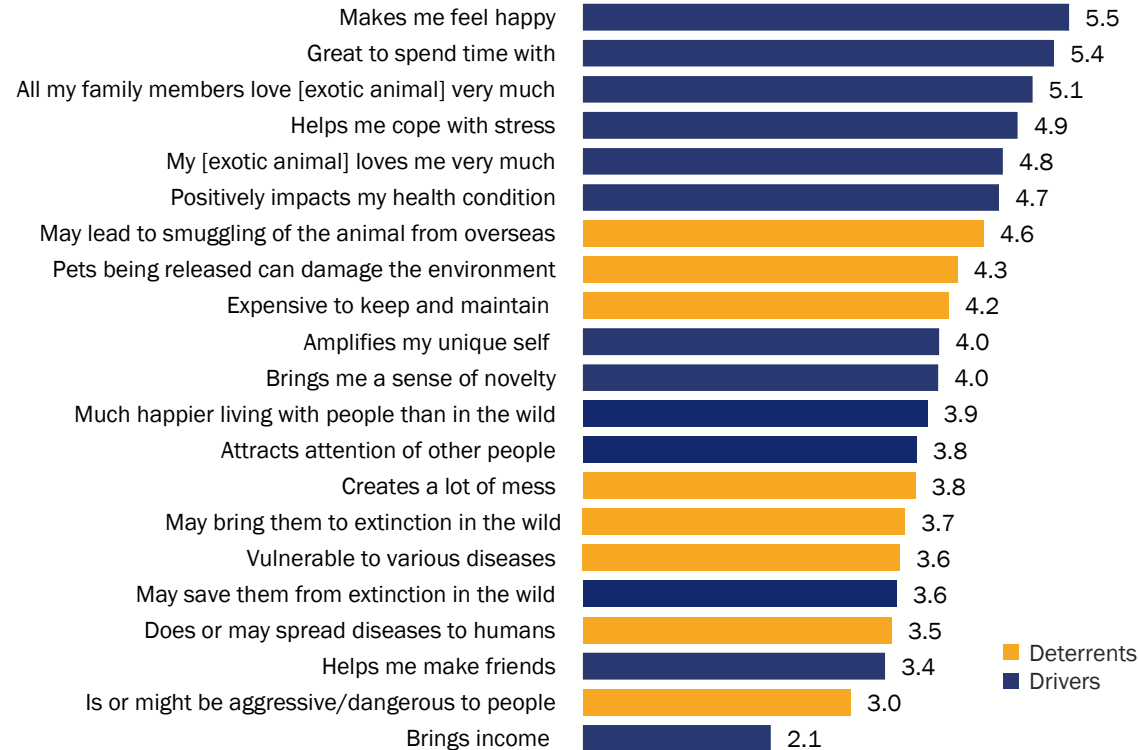
Owners believe:

Since they provide a good home and care for their pet, there will not be issues for welfare, threat for non-native species, or zoonoses.

Intenders believe:

The exotic pets in pet shops are not associated with smuggling and endangered species. There is a basic trust in what is being sold at the shop.

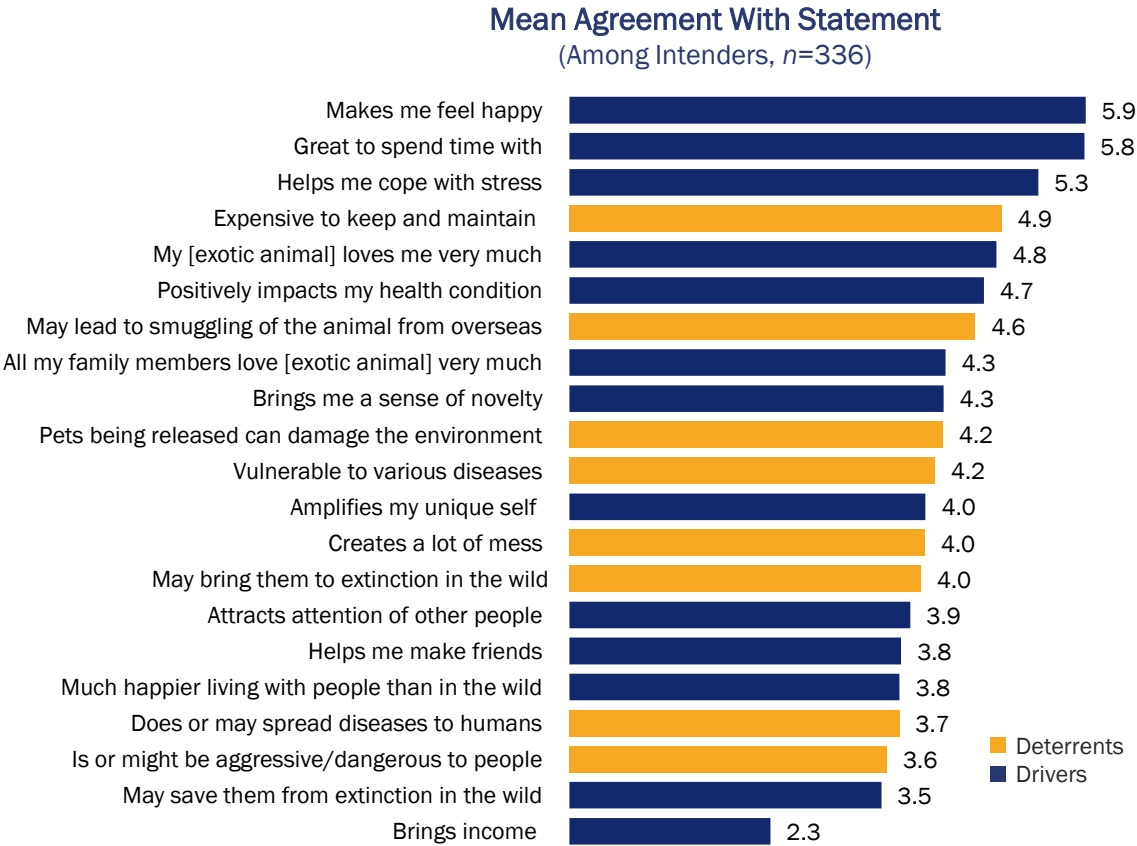
Mean Agreement With Statement (Among Owners and Intenders, n=329)



Experience of Exotic Pet Ownership –Intenders

Agreement with positive statements (drivers) about owning an exotic pet is higher than agreement with negative statements (deterrents), though some negative attributes also resonate with Intenders.

Expense and the acknowledgement that the demand for exotic pets may lead to smuggling from overseas is the deterrent that is most agreed upon by Intenders.



*1 = Serious Intenders
*2 = Casual Intenders

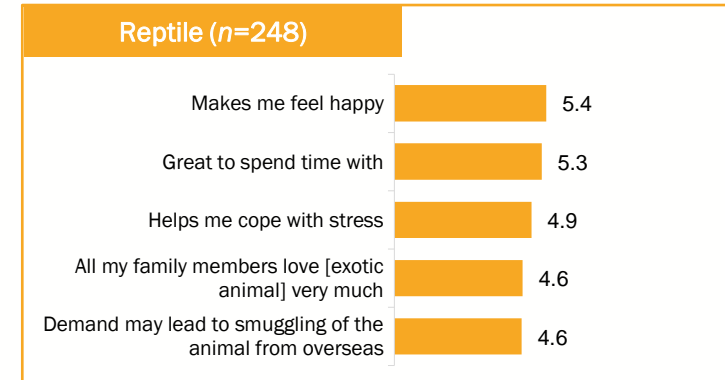
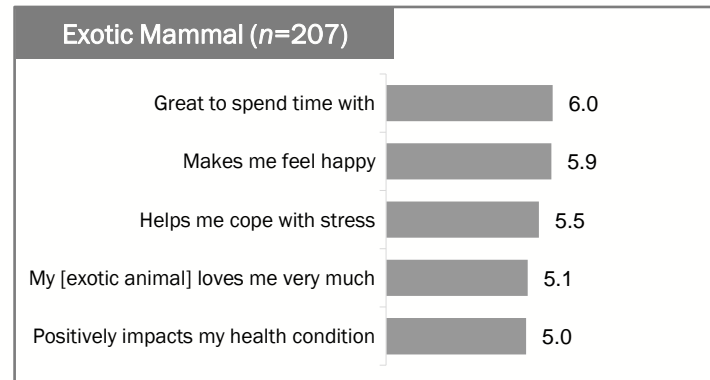
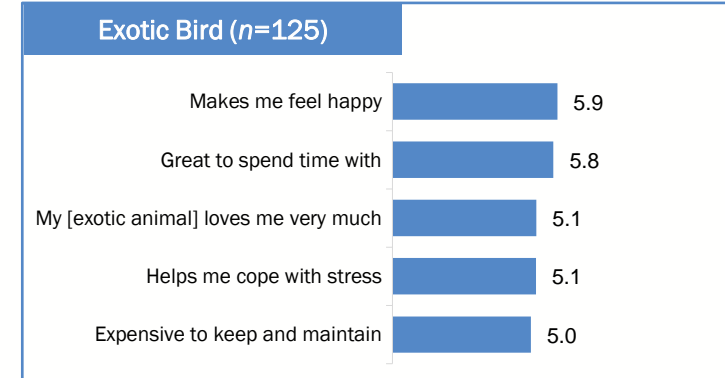
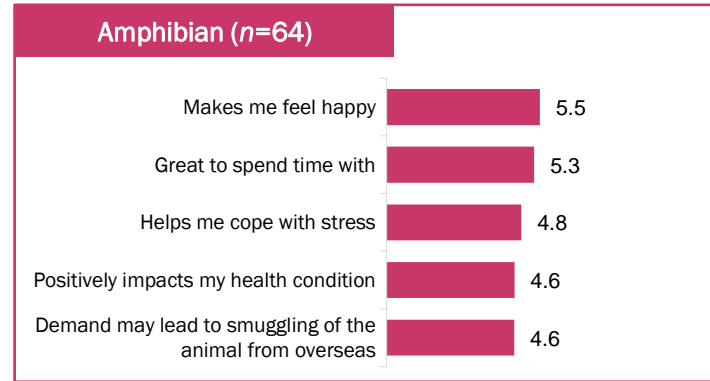
1*	2*
5.7	5.9
5.7	5.9
5.3	5.4
4.7	5.0
4.8	4.9
4.6	4.8
4.4	4.8
4.4	4.2
4.5	4.1
4.2	4.3
4.2	4.1
4.2	4.0
4.0	4.1
3.9	4.0
4.0	3.8
3.9	3.7
3.9	3.6
3.8	3.7
3.6	3.6
3.7	3.4
2.7	2.0

Experience of Exotic Pet Ownership – Owners and Intenders, by Taxa

Overall, the experiences of Owners of different taxa are similar. Mammal and Bird Owners share many of the same perceptions and experiences, as do Amphibian and Reptile Owners.

Owners and Intenders of exotic birds and mammals are significantly more likely to say the animal is expensive to keep or maintain, that their animal is vulnerable to diseases, might be aggressive, and creates a mess compared to Owners and Intenders of Reptiles and Amphibians.

Exotic Mammal Owners are more likely to say their animal attracts the attention of other people and helps them cope with stress compared to the other taxa.



Replacing Desire for Exotic Pets – Quotes from Qualitative Research



"I would work in zoos, conservation facilities, pet shops, etc., or go to zoos frequently. If you can't get close because of allergies, you'll cherish the memories of the pets you've had." – Owner, Male (20s)



"I will go to see a pet that my friend has. Watch videos and photos on YouTube and Instagram. Go to the pet shop to see. "
– Intender, Female (30s)



"I'm going to have another pet again. I used to have a dog."
– Owner, Female (30s)

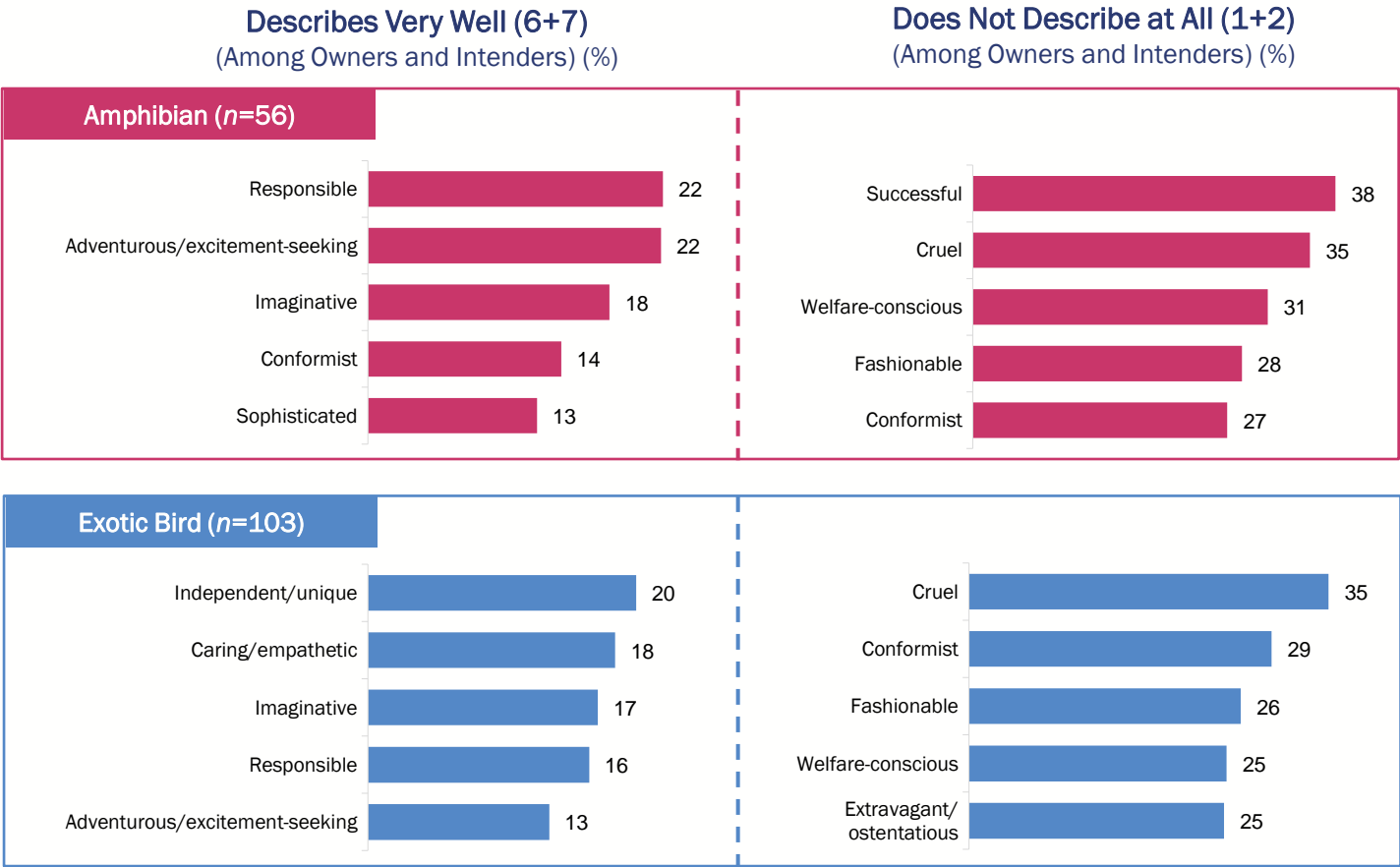


"I would interact with an exotic animal at a hedgehog café and satisfy my desire for owning one."
– Intender, Female (30s)

Self-perception of Exotic Pet Owners and Intenders – Amphibians and Birds

When asked what attributes describe an owner of the exotic pet that they own or intend to own, Owners and Intenders perceive mostly positive traits.

Amphibian Owners and Intenders are split on whether they are described as conformist, although a greater proportion say they are not (27%) compared to those who say they are (14%). Amphibian and Exotic Bird Owners disagree that some seemingly positive traits such as welfare-conscious and fashionable can be used to describe owners of these species.



Insights from Qualitative Research

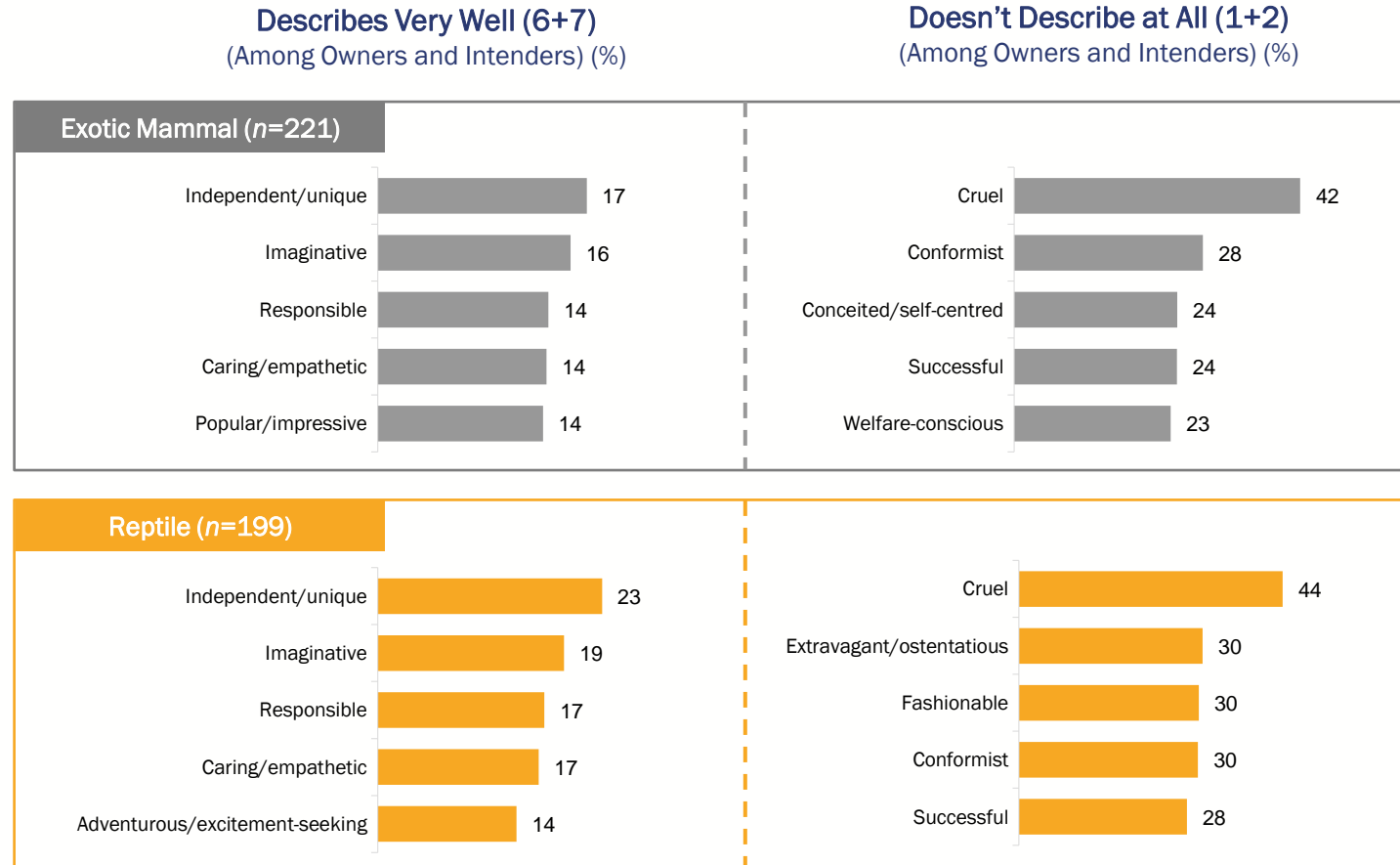
Owners of exotic animals, particularly reptiles and birds of prey, are often associated with a “strong personality” while owners of cute mammals are associated with “affectionate,” “likes cute things,” and “fashionable, Instagram-following girls.”

Self-perception of Exotic Pet Owners and Intenders – Mammals and Reptiles

When asked to describe an owner of the exotic pet that they own or intend to own, Owners and Intenders perceive mostly positive traits, though some positive traits are also said not to describe an owner of the species.

Compared with other pet owners, Mammal Owners are significantly more likely to attribute positive traits to an owner of an exotic mammal, especially being popular and impressive compared to the self-perceptions of other taxa.

Approximately one in four Reptile and Mammal Owners say that the term “successful” does not describe owners of these species at all.





3.5 Exotic Animal Venues

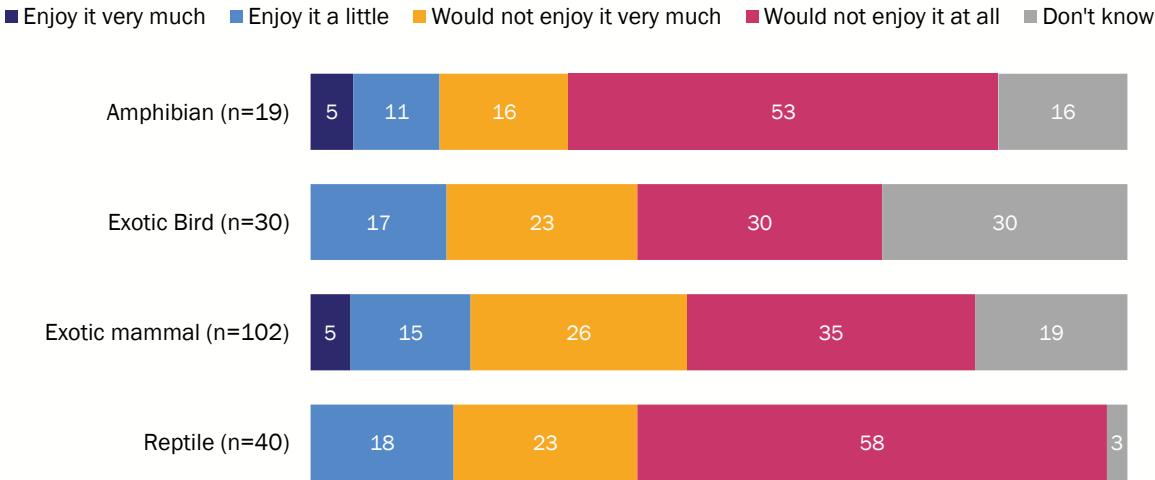
Enjoyment of Interacting with Exotic Animals

Fewer than one in five Non-owners/Non-intenders say they would enjoy interacting with exotic animals of any species.

When asked if they would like to interact with an exotic reptile, 80 percent* of Non-owners/Non-intenders say they would not enjoy it.

Exotic birds are the group that Non-owners/Non-intenders are least resistant to interacting with, i.e., the lowest number of Non-owners/Non-intenders say they “would not enjoy [interacting with them] at all.”

Enjoyment of Interaction with Exotic Animals
(Among Non-owners/Non-intenders, n=335) (%)

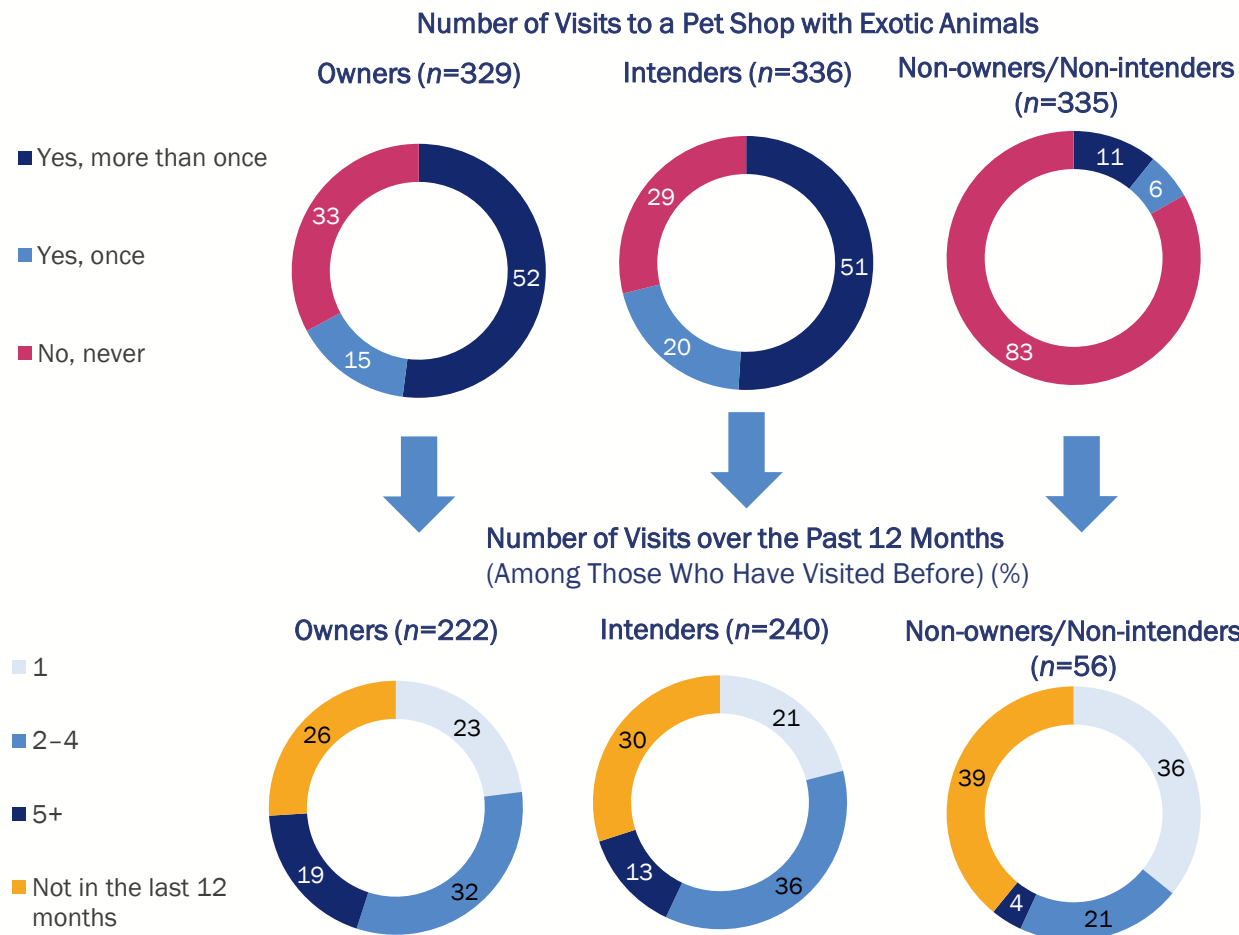


*Numbers appear different in the chart due to rounding
Q20. Would you enjoy interacting with [assigned animal] (e.g., holding them, playing with them)?
Base: Non-owners/Non-intenders who were assigned an exotic species n=191

Number/Frequency of Visits to Pet Shop with Exotic Animals – Owners, Intenders, Non-owners/Non-intenders

More than two thirds of Owners and Intenders have been to a shop with exotic animals. Owners and Intenders are similar in their visiting habits to pet shops with exotic animals.

For visits to exotic animal cafés and pet fairs, see pages 79 – 80 in the Appendices.



Reasons for Visiting Exotic Pet Cafés – by Age

The healing nature of the animals is the most popular reason to visit an exotic pet café and younger participants are more likely to visit for this reason than older participants.

Playing with the animals is also a popular reason for visiting exotic animal cafés among all age groups, while younger participants are more likely to report that they visited to research buying an exotic pet.

Among those who have been to an animal café, half are Intenders (50%), 44 percent are Owners and 12 percent are Non-owners, Non-intenders (data not shown).

Reasons to Visit an Exotic Pet Café
(Among Those Who Have Been to an Exotic Animal Café, n=221) (%)

		Age					
		Those Who Have Been to an Exotic Animal Café	18–24	25–34	35–44	45–54	55+*
		(n=221)	(n=41)	(n=71)	(n=53)	(n=40)	(n=16)
1	For the healing nature of the animals	48	51	56	47	33	44
2	To play with the animals	48	39	56	42	55	31
3	To research buying a pet	23	29	30	13	20	13
4	To show to somebody else	13	12	14	13	8	25
5	Somebody else made the decision	13	12	14	8	20	13
6	Meeting new people	10	15	11	9	5	6
7	To take photos for social media	9	15	8	9	8	0

Top three reasons per age group

*Small sample size

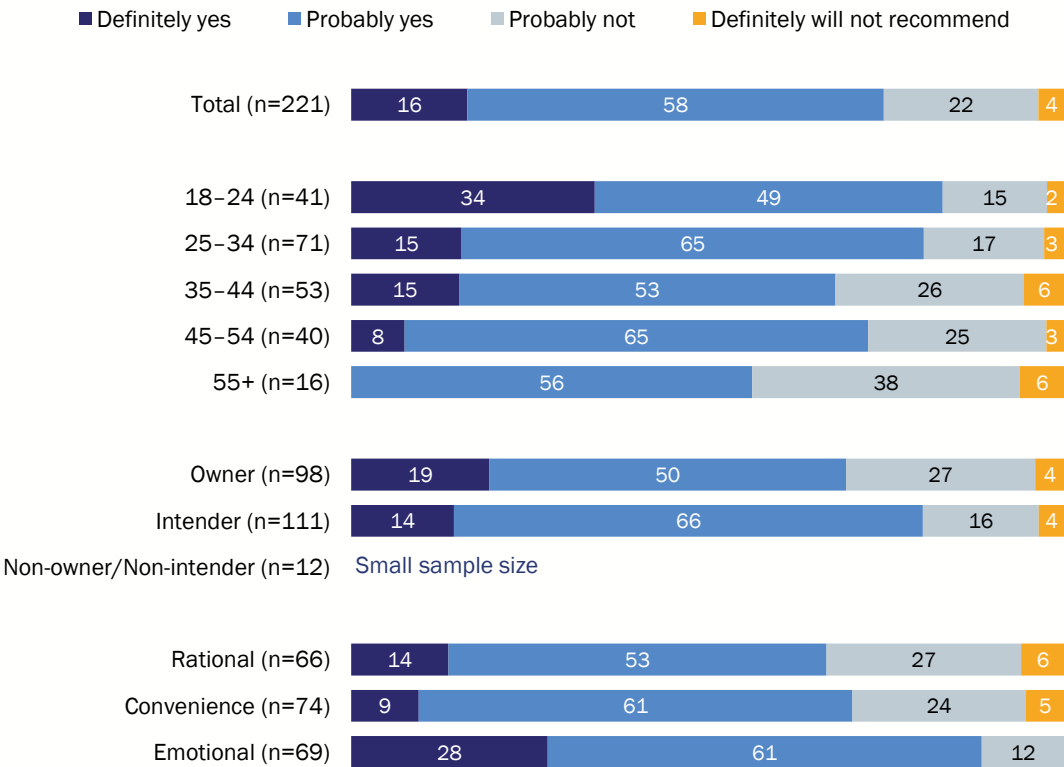
Recommending Visits to Exotic Animal Cafés

Nearly three-quarters of participants (74%) who have visited an exotic pet café would recommend it to people they know.

Younger participants are significantly more likely to recommend visiting these cafés, while Convenience participants are less likely.

Emotional Bond participants are the most likely segment to recommend visiting an exotic animal café.

Recommending Visits to Exotic Animal Cafés
(Among Those Who Have Been to an Exotic Animal Café, n=221) (%)



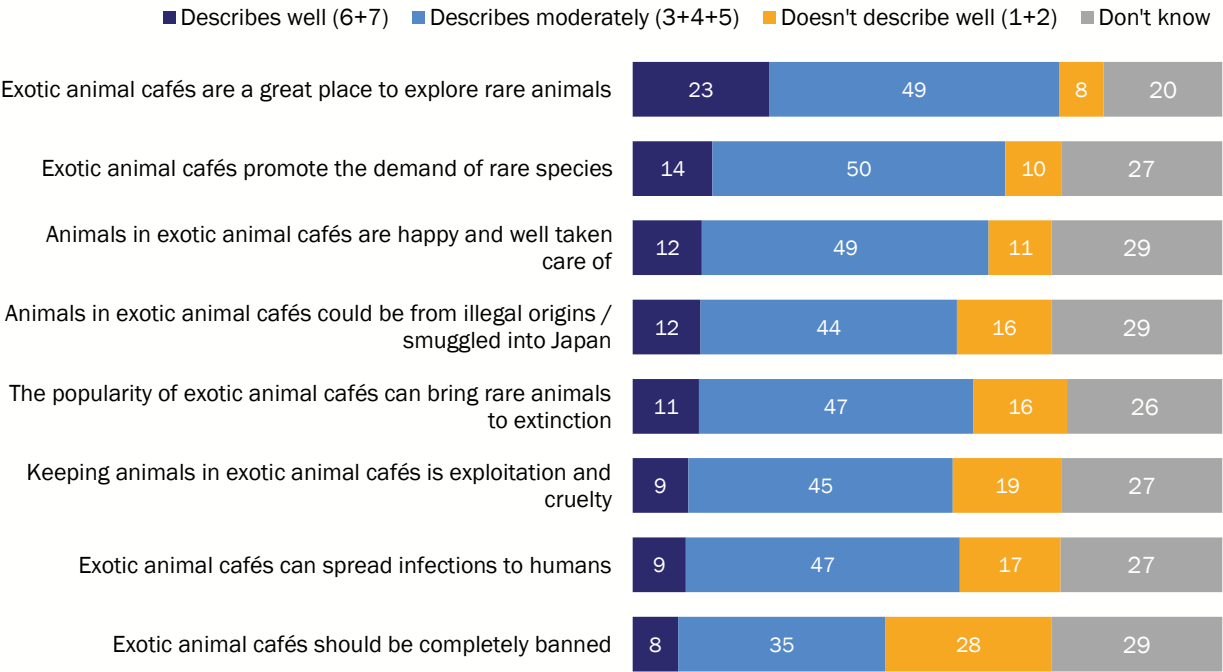
Attitudes toward Exotic Pet Cafés – by Segment



Although the primary sentiment about animal cafés is positive, many participants agree that there are also negative aspects such as promoting demand for rare species and potential illegal origins of the animals.

Convenience participants are significantly more likely to recognize some of the potential downsides of exotic animal cafés.

Attitudes toward Exotic Pet Cafés
(Among Total Sample, n=1,000) (%)



*1 = Rational segment
*2 = Convenience segment
*3 = Emotional Bond segment

Mean scores			
Total	1*	2*	3*
4.6	4.9	4.4	4.9
4.2	4.5	3.9	4.2
4.0	4.3	3.8	4.6
3.8	3.8	3.8	3.3
3.8	3.8	3.8	3.4
3.6	3.5	3.6	3.2
3.6	3.5	3.9	3.3
3.1	2.8	3.3	2.7

Significantly higher than all other segments



4. Conclusions and Recommendations

Conclusions and Recommendations (1)

Target specific stages in the information-gathering journey of the journey to owning an exotic animal (see page 44).

- Among the general population, rates of ownership (2%) and intention to own exotic pets (1%) are low. For most Owners, however, the process of information gathering is much longer. Because the rates of purchase are low, widespread public awareness campaigns will not be an efficient way to change behavior. The searching and information stage of the journey, before the buyers have interacted with the animals at length, is a time when they will gather data from a variety of information sources. Presenting them with information about the negative aspects of exotic pet ownership at this point will help sway them to consider alternatives, including buying domestic animals. Targeting online searches is a good way to efficiently deliver messages to the people who are searching for information. Social Networking Sites, especially YouTube, play a strong role in increasing people's intention to buy exotic pets.

Target motivations rather than specific species.

- The differences in motivation between Intenders who plan to buy animals belonging to different taxa are not as distinct as the segments defined by attitudes. Target Emotional Bond Intenders because they have high rates of intention to purchase and are more amenable to changing their opinions than Convenience Intenders. Encourage the Convenience segment to relate their negative experience in owning an exotic pet.

- **Rational segment** – Lower Priority: this group is less likely to have bought their animal recently, and those who intend to buy one in the future are least likely to be Serious Intenders, i.e., the least likely to buy their pet in the next 12 months. The taxa they intend to buy most are parrots (but see page 24 for note on parrots). They report the strongest reaction to discouraging information such as information about smuggling, illegality or disease. Target their concern for the animal's status in the wild and the links to smuggling.
- **Convenience Segment** – Medium priority: this group are the most likely to be serious intenders, but they are the least excited about exotic pets. This group is significantly more male, older (55+) and living with children. The taxa they intend to buy most are turtles / tortoises. They may be more passively buying exotic pets (e.g., for their children) and are the least likely to be swayed from purchasing. Target their unhappiness with owning an exotic animal and the difficulties with owning one as well as links to smuggling.
- **Emotional Bond Segment** – Higher priority: this group are similar to Convenience Intenders in the seriousness of their purchase intention but have the highest knowledge about owning exotic pets and the most enthusiasm for owning them. The taxa they intend to buy most are hedgehogs. They are more likely than Convenience Owners / Intenders to be discouraged by information on the negative aspects of exotic pet ownership. Target their concern about smuggling and diseases.

Conclusions and Recommendations (2)

Work with pet shops to divert consumer demand towards alternatives with less risks.

- Intenders put a lot of trust in pet shop staff who downplay the difficulties and issues surrounding the exotic pet trade. Pet shops are also an important touchpoint for changing people's intentions from casual to serious. Identifying these moments and targeting interventions at them will help reduce purchase.

Target first-time Intenders.

- Intenders are more likely to report that factors such as smuggling, illegality, and disease risk would act as deterrents compared to Owners, indicating that this group are easier to sway. Owners have a high intention to purchase again in the future so stopping exotic pet purchase before they have bought one will have a compounding effect of preventing further purchase. Owners may change their minds but after experiencing owning a pet, they are less likely to see the potential negative effects as relevant to their own situation.

Engage with Non-owners, Non-intenders

- Non-owners/Non-intenders are unlikely to change their minds and decide to buy exotic pets. However, engaging with this group could help change social acceptability and provide more barriers to purchase. As social pressure plays a part in being an obstacle to purchase, moving Non-owners/Non-

intenders from being indifferent toward exotic pet ownership to being against it would help reduce purchase and make them more likely to advocate for efforts to strengthen laws and enforcement.

Combine push factors away from exotic pets with pull factors toward domestic animals.

- Intenders have a high intention to purchase domestic animals as well as exotic animals and are therefore likely still deciding which species they want. Nudging them during this decision-making process can steer them toward domestic species. Intenders and owners see domestic species as a good replacement for exotic pets and many do not see a distinction. Promoting alternative actions can help increase the effectiveness of messages that work as a deterrent and increasing barriers to exotic pet ownership, while making the purchase of domestic animals more attractive will help drive change more effectively.

Highlight the negative aspects of exotic pet cafés.

- Although not an important initial trigger, animal cafes contribute to the move from intention to purchase to actual purchase. People do not perceive them negatively for the most part but are willing to admit that there are negative aspects to them when prompted. Making the negative aspects more front-of-mind will help take away positive perceptions of these venues.

Conclusions and Recommendations (3)

Highlight the message that exotic pet Owners do not see them as suitable for everyone and bring attention to the difficulties inherent in owning exotic pets.

- Pet shops underplay the difficulties of owning an exotic pet and the potential issues relating to smuggling or disease. Highlighting the practical challenges associated with exotic pet ownership as well as the potential issues will help steer people away from purchasing.

Highlight the smuggling and potential links with illicit crime that is inherent in the exotic pet trade as deterrents.

- The issue of animal smuggling is the one that resonates most strongly with Owners and Intenders. Few are aware of the issue, and many describe it as a deterrent. This, more than disease risk, welfare concerns, or invasive species issues is likely to change intentions. Targeting extinction risk will also help with Rational Intenders. These messages should be used as part of an SBC campaign that focuses on both push and pull factors.

Manage the content of information.

- Many people find the lack of information on how to care for the animal a significant barrier to purchase. Providing information that details proper welfare for exotic animals while highlighting the difficulties and potential issues with exotic pet ownership will help dissuade those for whom these factors are a big influence.

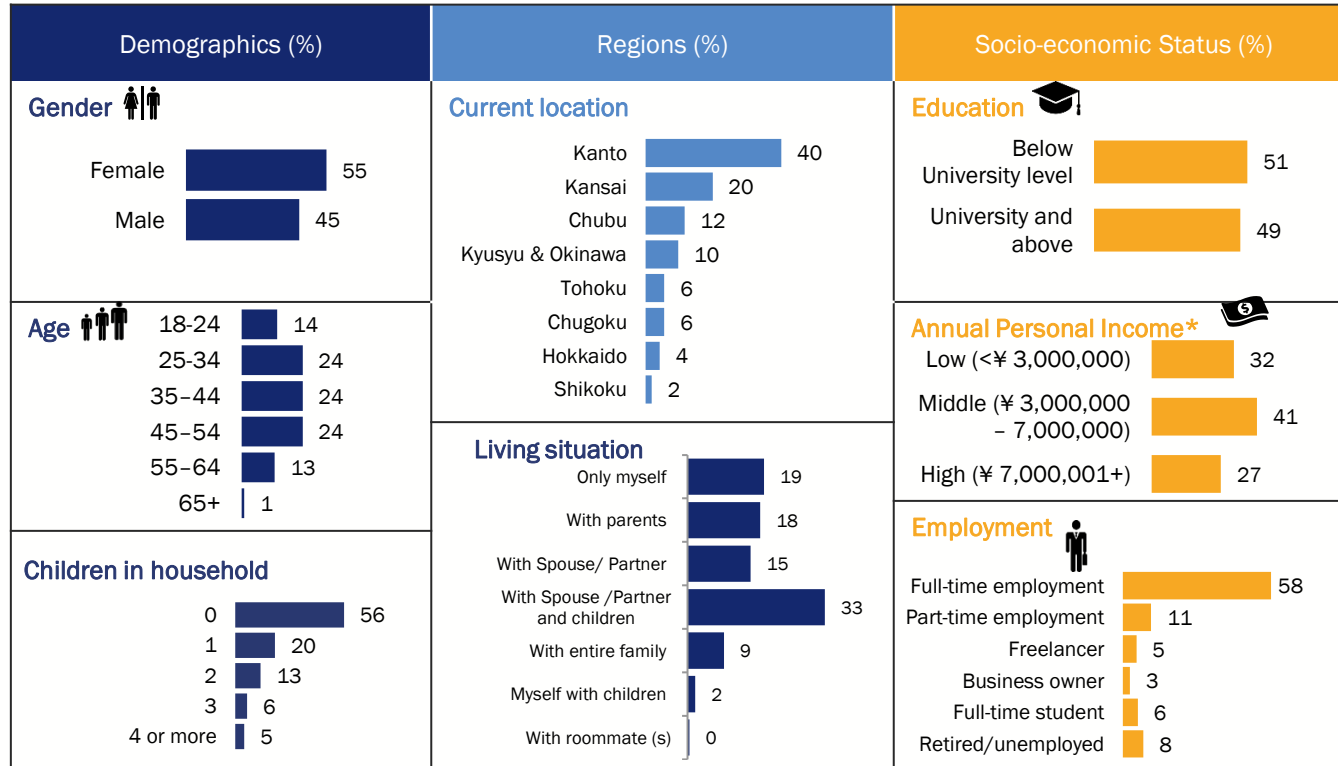
When targeting online behavior, target media used by younger people.

- When looking at demographics, certain age groups stand out as ones that can be targeted to increase the effectiveness of campaigns. Young people are more likely to see the ownership of exotic pets as being acceptable and believe others see it this way too. The rate of recent purchase is highest among 25–43-year-olds but intention to purchase is similarly high among all age brackets. This indicates that younger people (18–24) are less able to realize their ambitions and may be at a good stage for an intervention, i.e., before they are too committed or have already purchased.



5. Appendices

Rational Segment

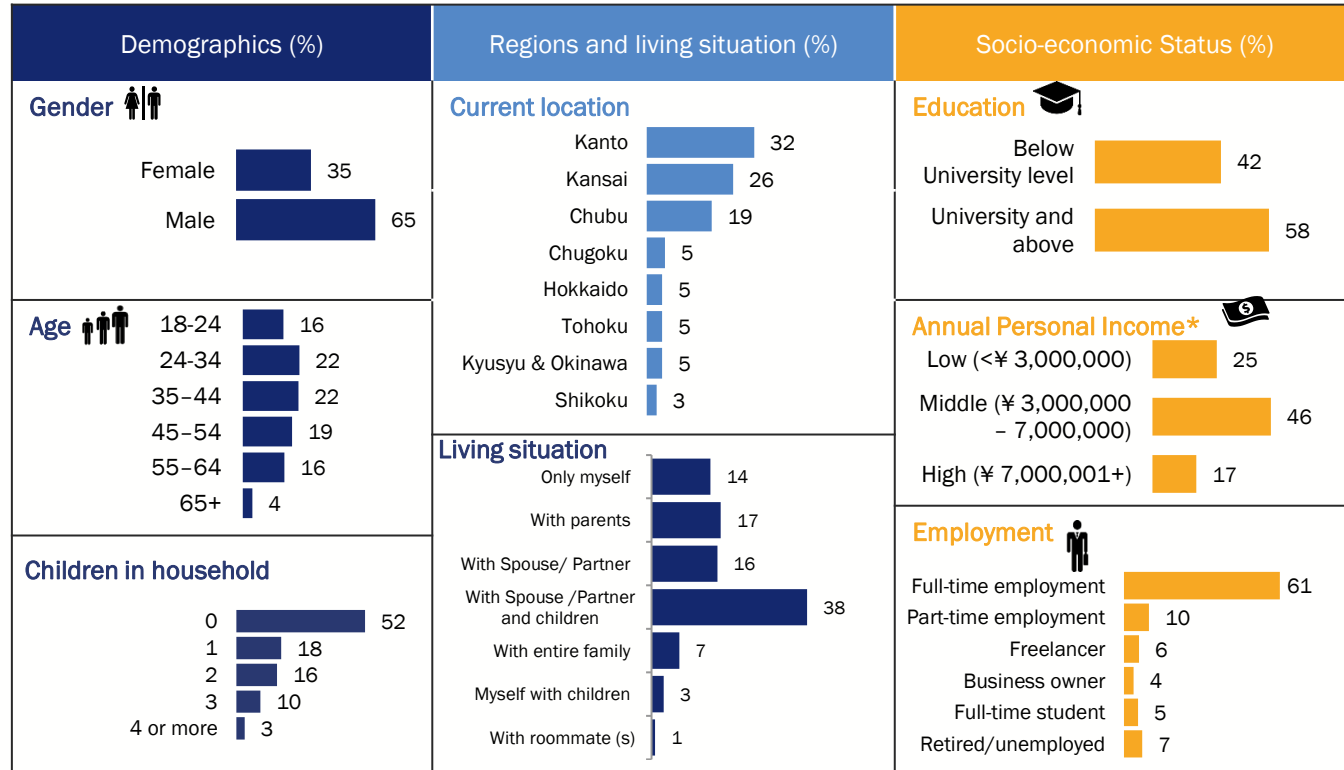


*¥ 1,000,000 = USD 8,800

S1. Gender; S2. Current location; S3. Age; S4. Education; Q29. Annual personal income; Q30. Current living situation; Q31. Children; Q32. Number of children; Q33. Employment

Base: Rational Segment, n=215

Convenience Segment

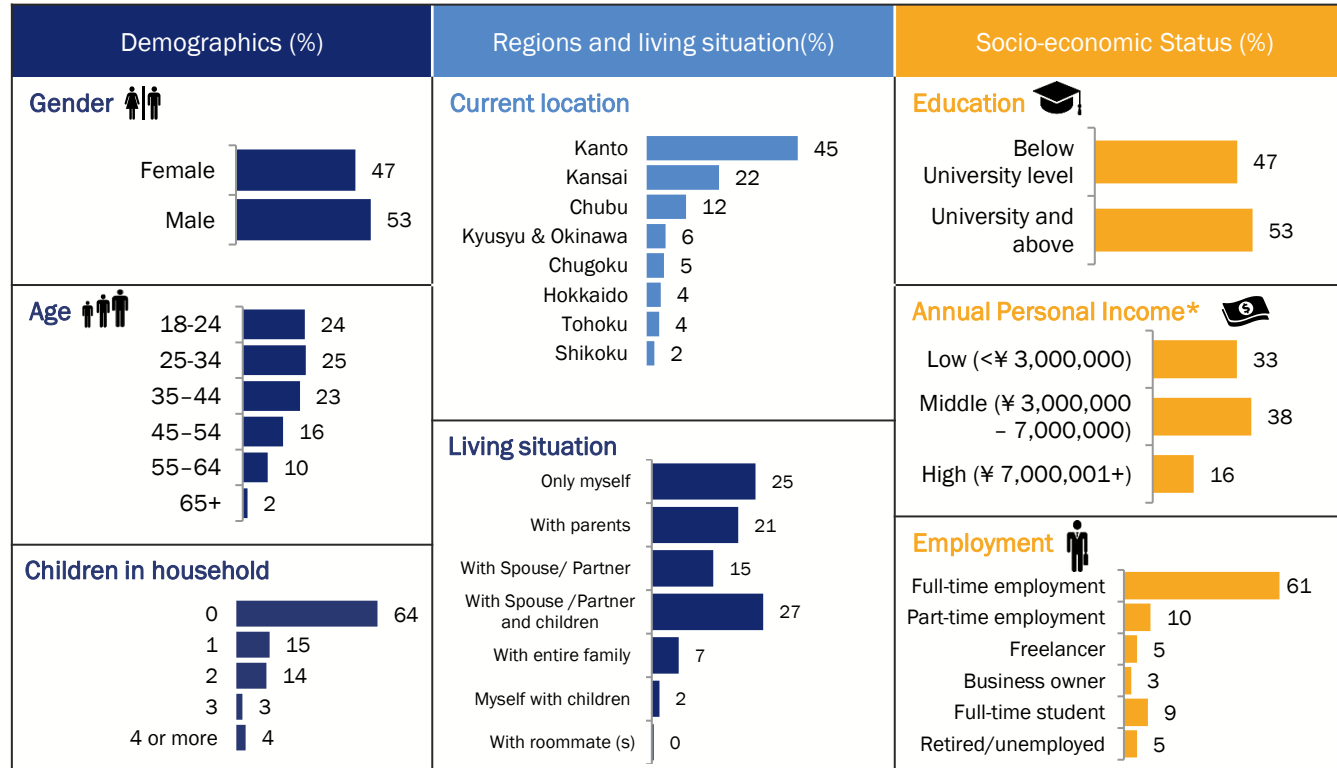


*¥ 1,000,000 = USD 8,800

S1. Gender; S2. Current location; S3. Age; S4. Education; Q29. Annual personal income; Q30. Current living situation; Q31. Children; Q32. Number of children; Q33. Employment

Base: Convenience Segment, n=237

Emotional Bond Segment

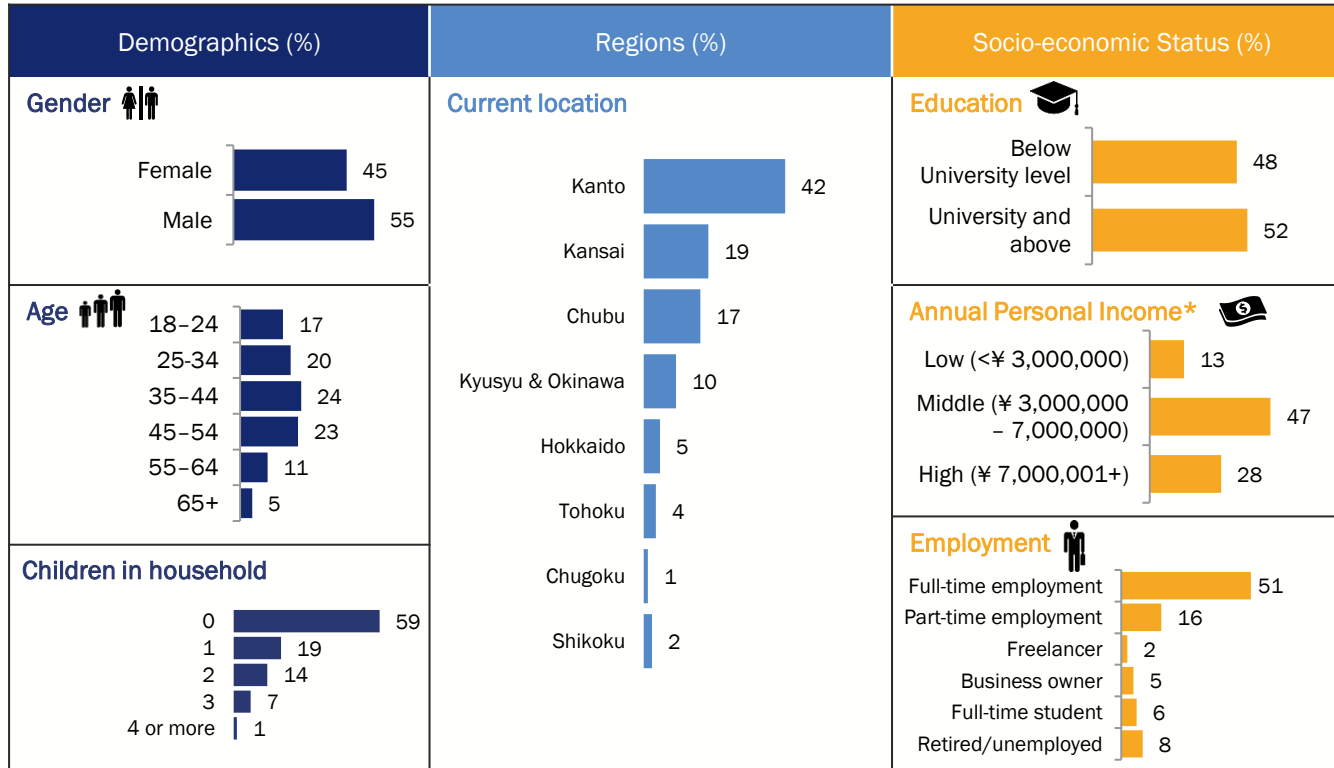


*¥ 1,000,000 = USD 8,800

S1. Gender; S2. Current location; S3. Age; S4. Education; Q29. Annual personal income; Q30. Current living situation; Q31. Children; Q32. Number of children; Q33. Employment

Base: Emotional Bond Segment, n=213

Amphibian Owners/Intenders

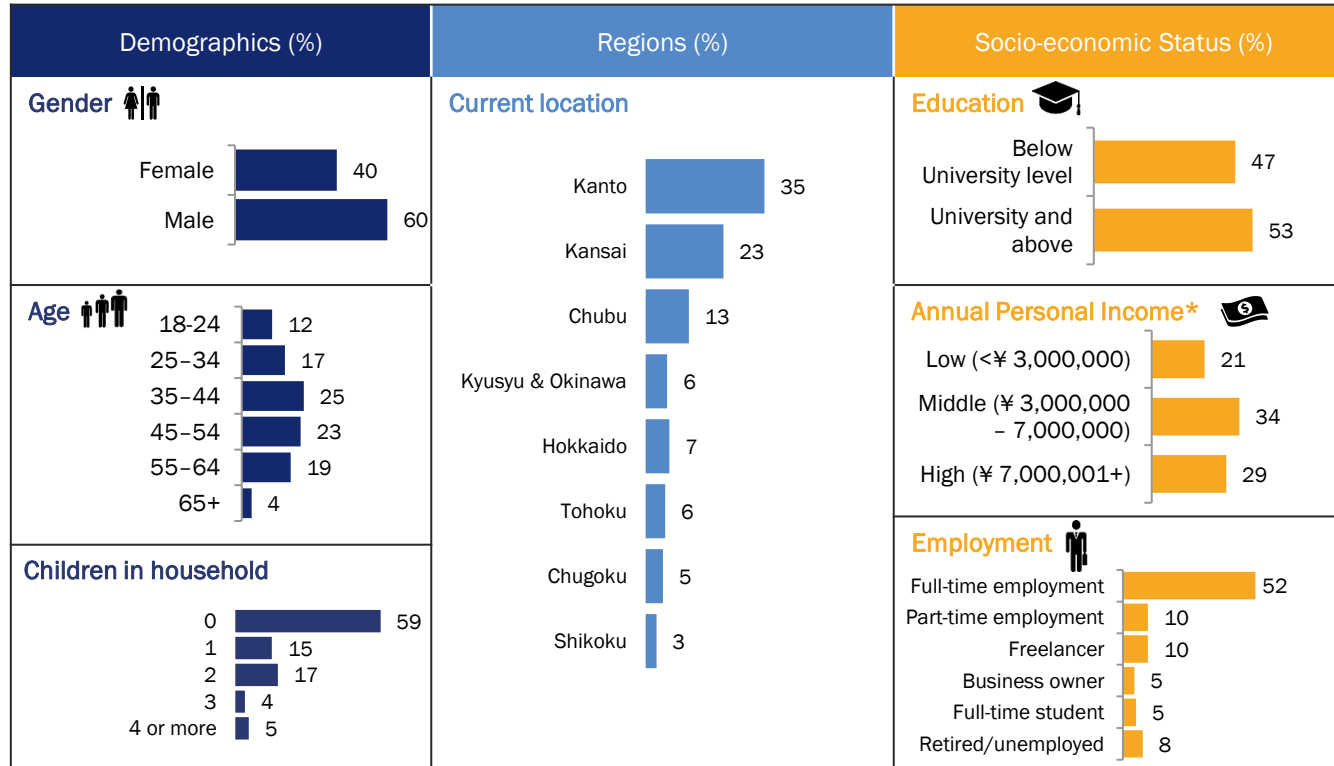


*¥ 1,000,000 = USD 8,800

S1. Gender; S2. Current location; S3. Age; S4. Education; Q29. Annual personal income; Q30. Current living situation; Q31. Children; Q32. Number of children; Q33. Employment

Base: Amphibian Owners/Intenders, n=83

Exotic Bird Owners/Intender

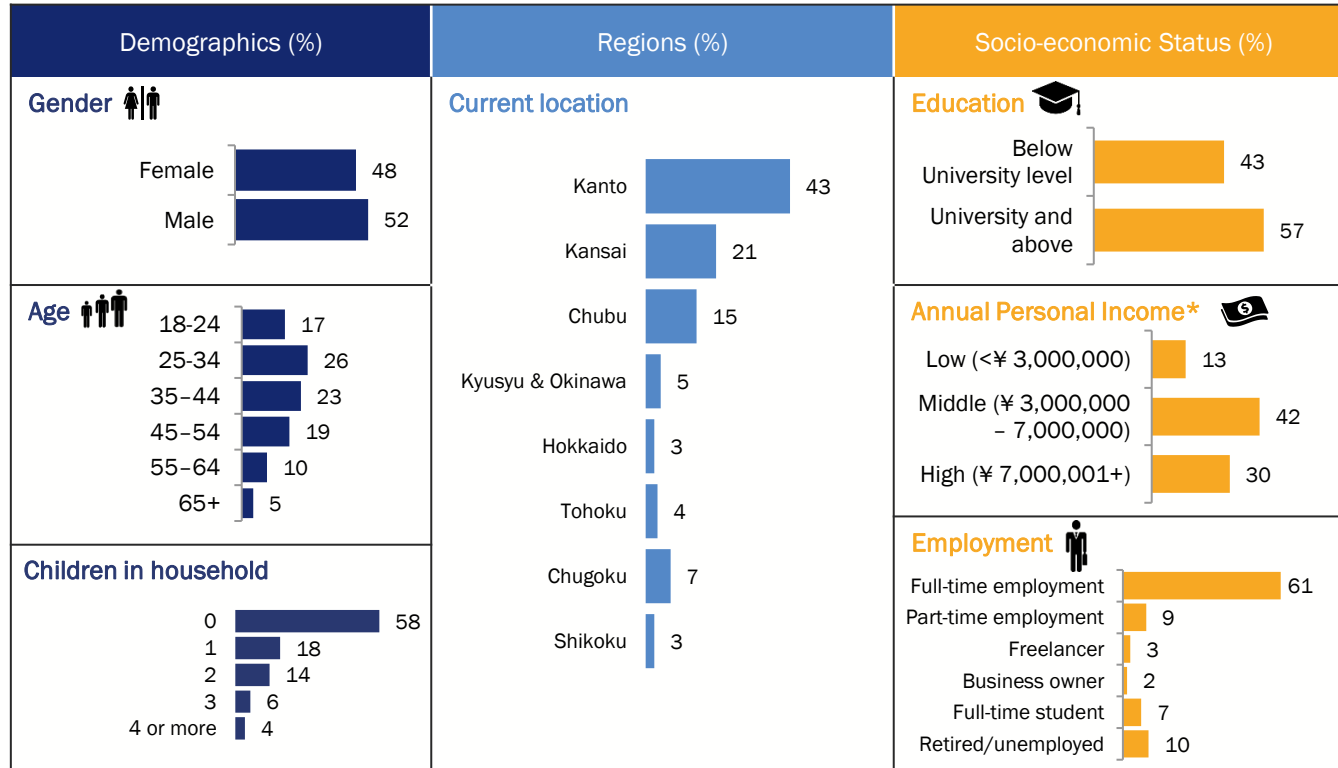


*¥ 1,000,000 = USD 8,800

S1. Gender; S2. Current location; S3. Age; S4. Education; Q29. Annual personal income; Q30. Current living situation; Q31. Children; Q32. Number of children; Q33. Employment

Base: Exotic Bird Owners/Intenders, n=155

Exotic Mammal Owners/Intenders

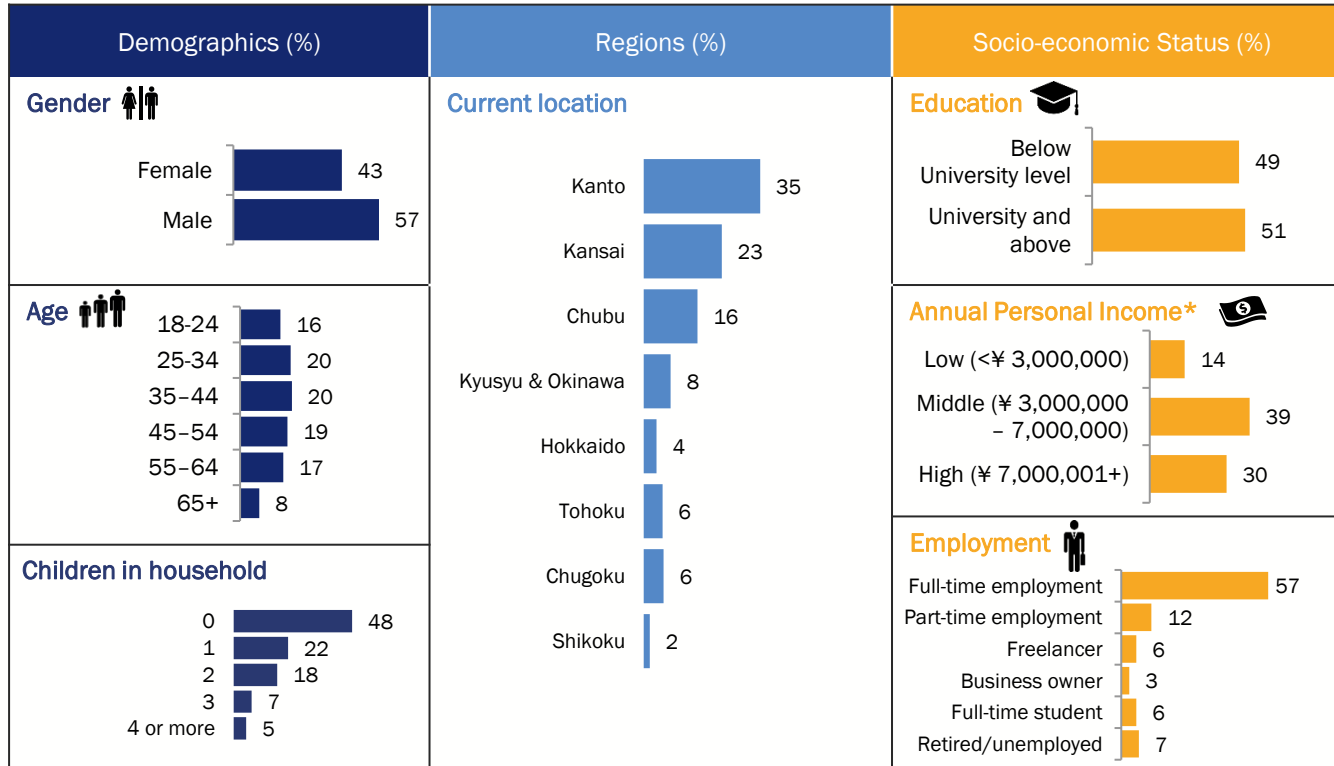


*¥ 1,000,000 = USD 8,800

S1. Gender; S2. Current location; S3. Age; S4. Education; Q29. Annual personal income; Q30. Current living situation; Q31. Children; Q32. Number of children; Q33. Employment

Base: Exotic Mammal Owners/Intenders, n=309

Reptile Owners/Intenders

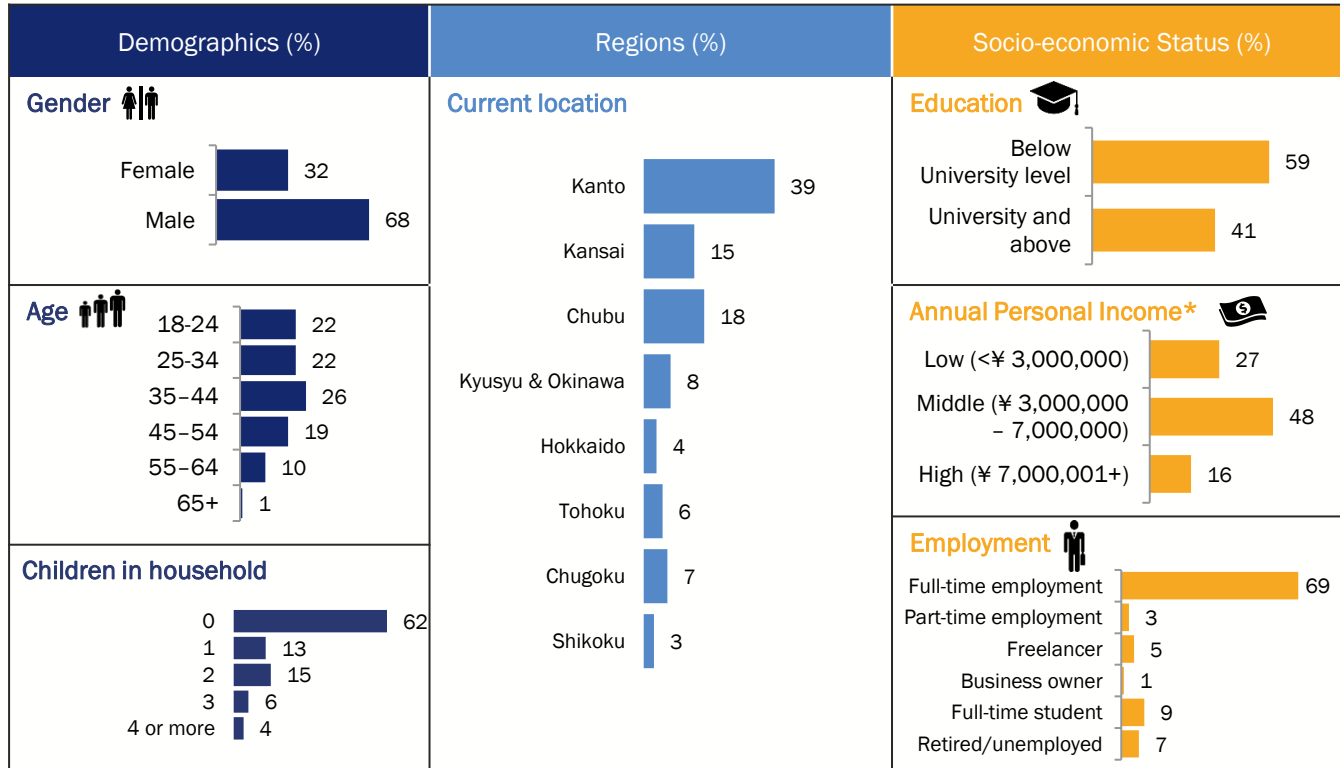


*¥ 1,000,000 = USD 8,800

S1. Gender; S2. Current location; S3. Age; S4. Education; Q29. Annual personal income; Q30. Current living situation; Q31. Children; Q32. Number of children; Q33. Employment

Base: Reptile Owners/Intenders, n=288

Serious Intenders



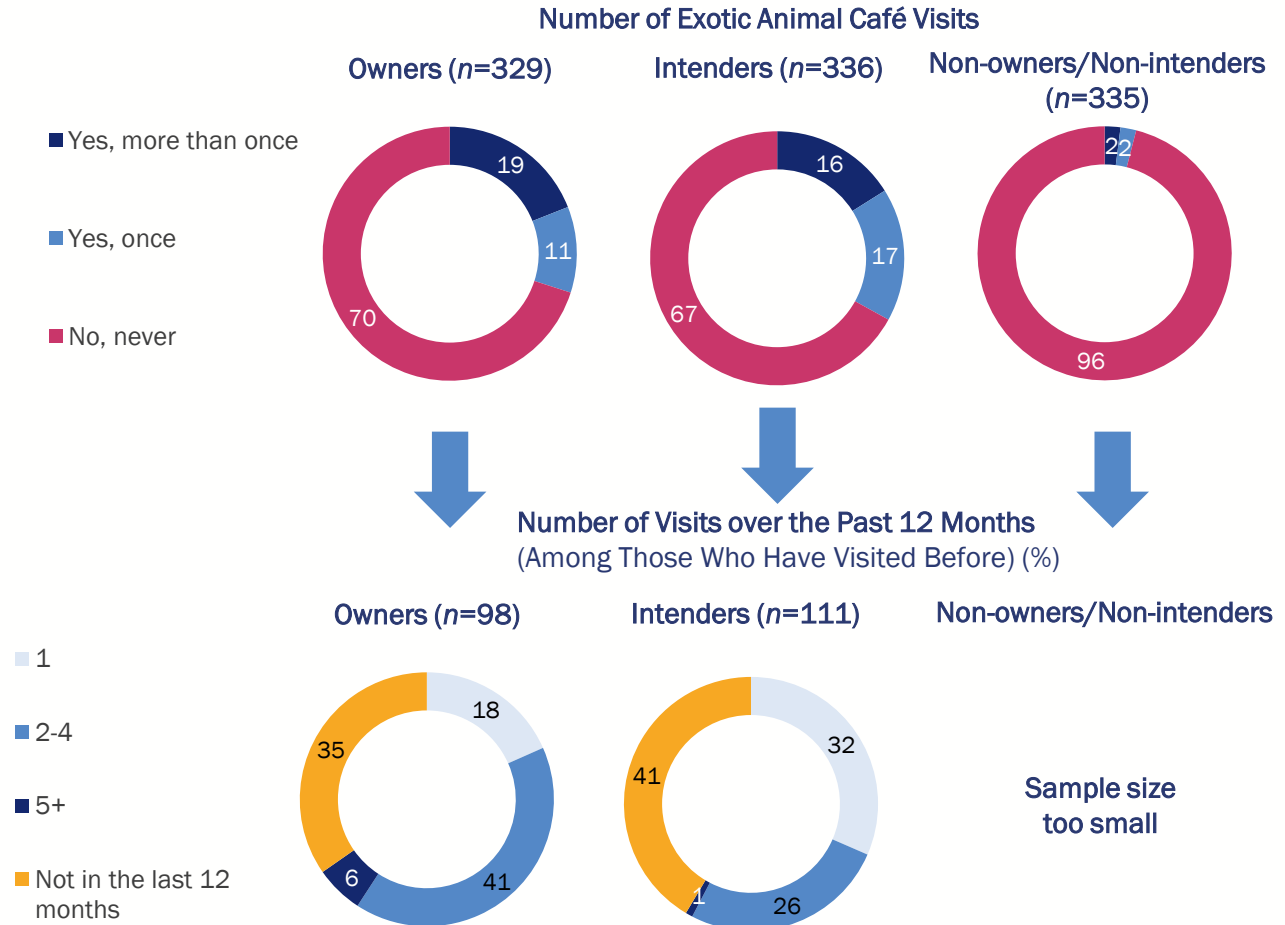
*¥ 1,000,000 = USD 8,800

S1. Gender; S2. Current location; S3. Age; S4. Education; Q29. Annual personal income; Q30. Current living situation; Q31. Children; Q32. Number of children; Q33. Employment

Base: Reptile Owners/Intenders, n=288

Number/Frequency of Exotic Animal Café Visits – Owners, Intenders, Non-owners/Non-intenders

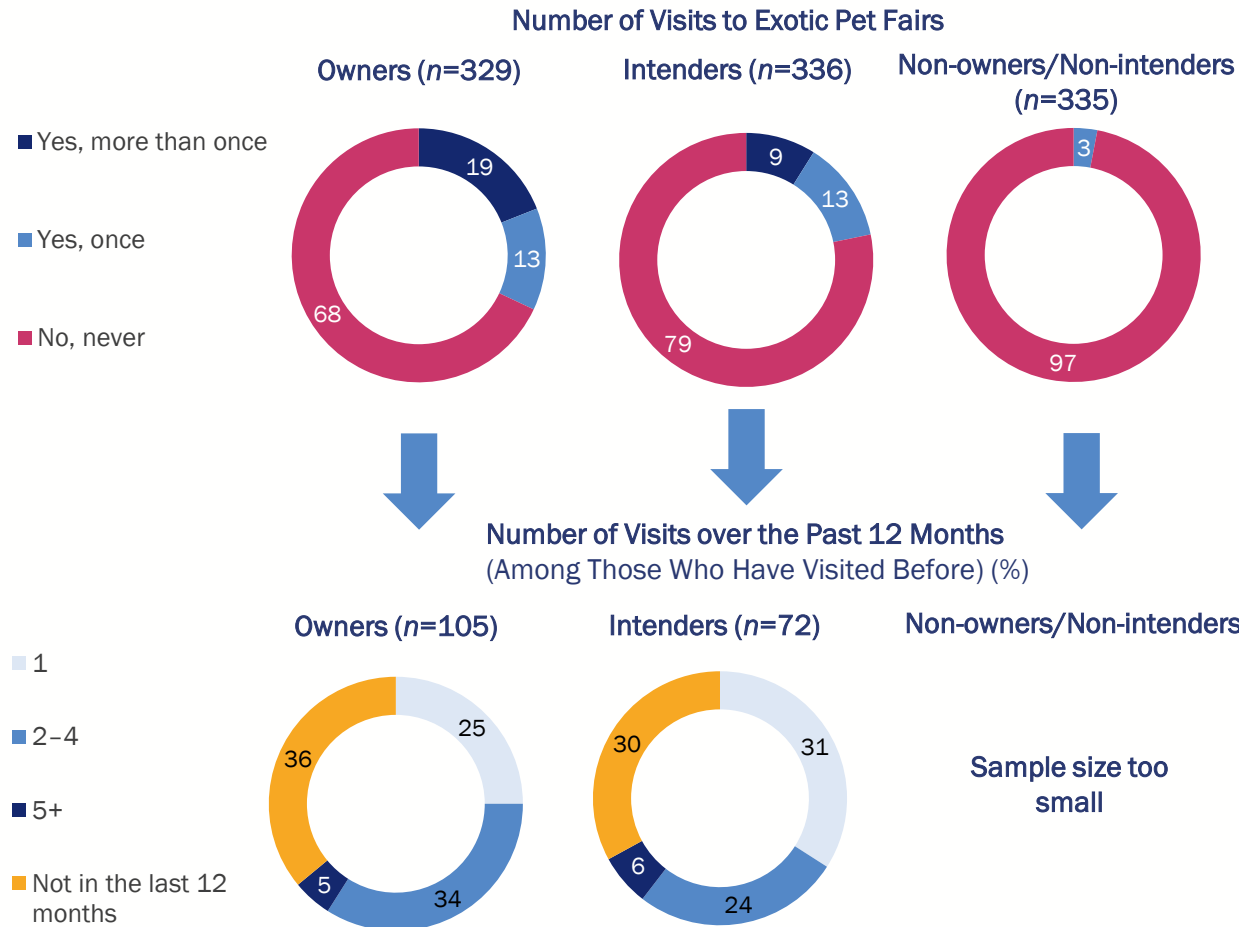
Owners and Intenders are similarly likely to have been to an exotic animal café in the past. Owners, however, are significantly more likely to have visited more frequently.



Number/Frequency of Visits to Exotic Pet Fairs – Owners, Intenders, Non-owners/Non-intenders



Owners are significantly more likely to have been to exotic pet fairs than Intenders.



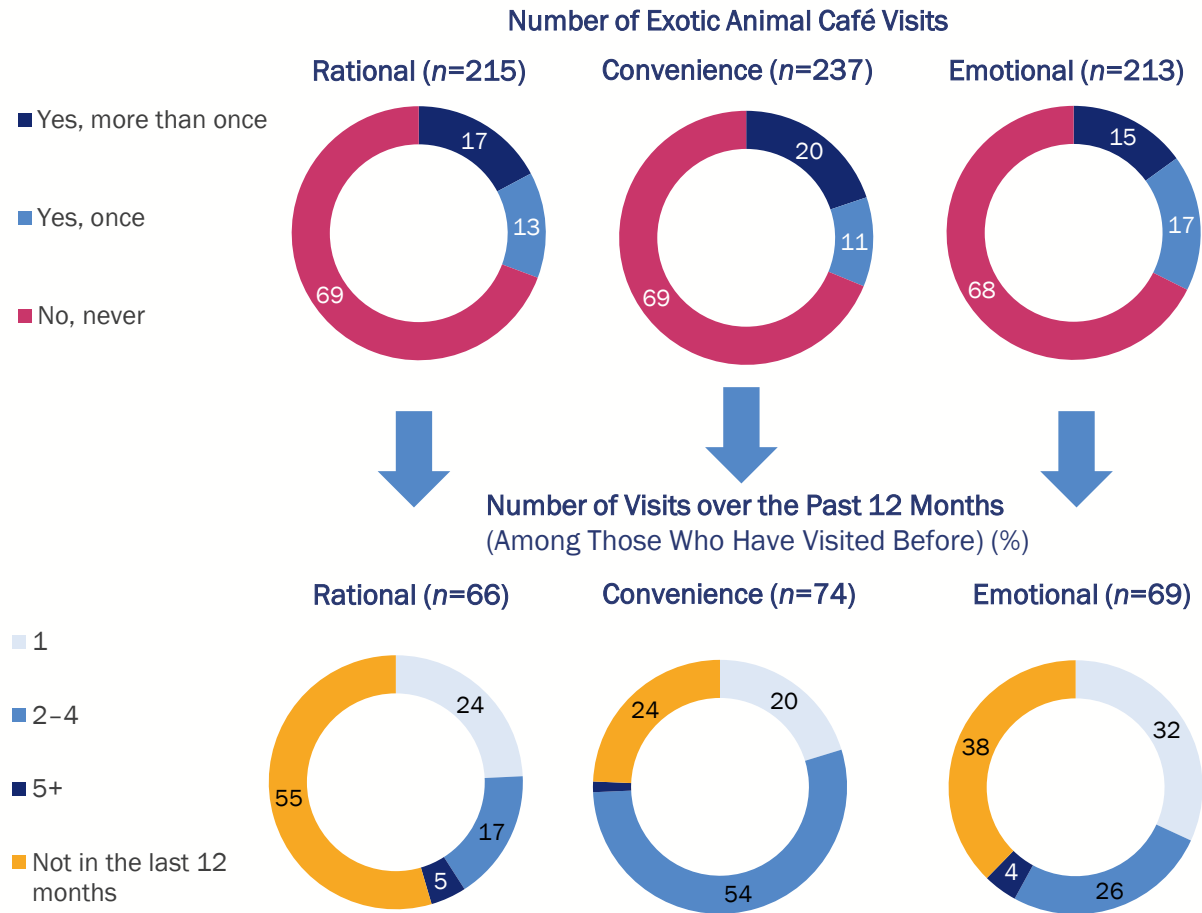
Number/Frequency of Exotic Animal Café Visits – by Segment



Each segment has a similar proportion of participants who have visited exotic animal cafés.

The Convenience segment is the most likely to have visited exotic animal cafés and have visited most frequently in the past 12 months.

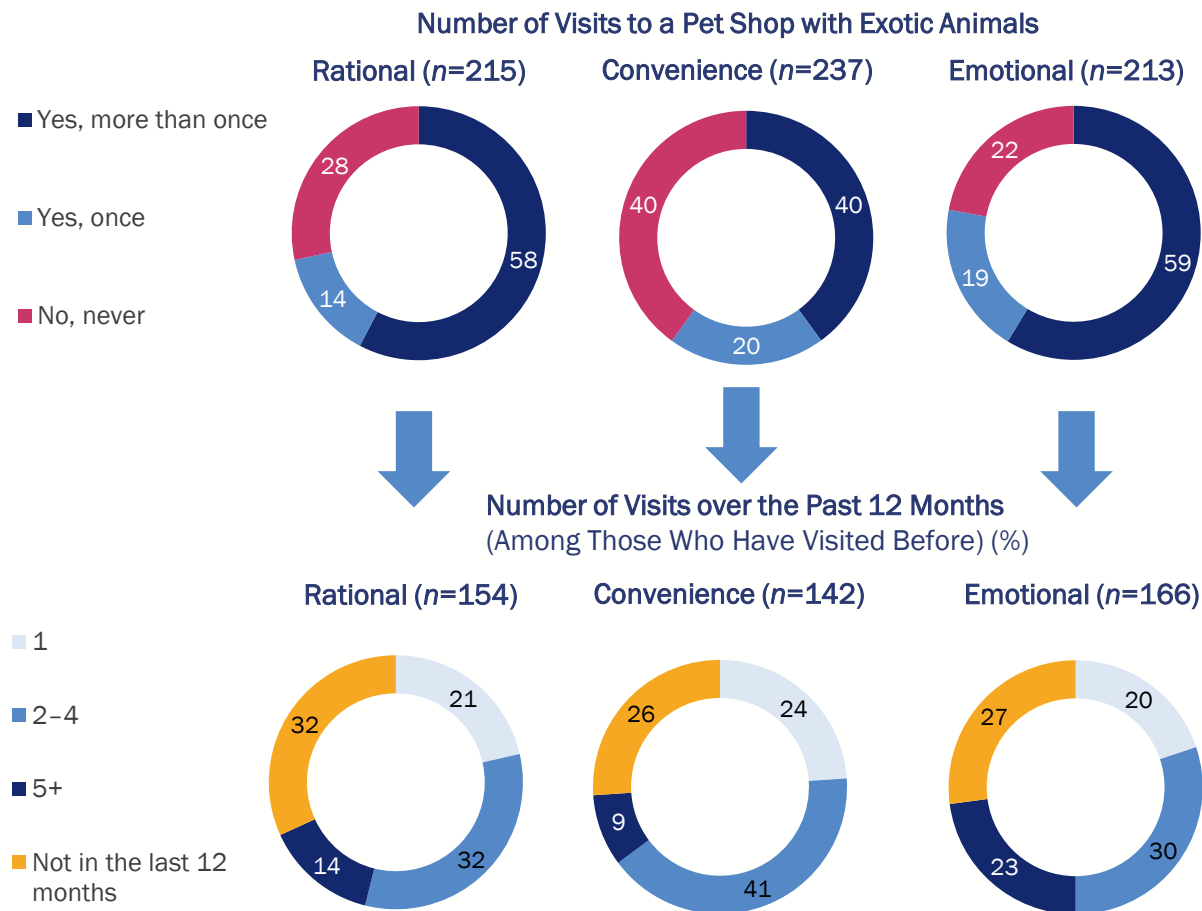
93 percent of ‘domestic pet owners only’ and 99 percent of Rejectors have never visited exotic animal cafés (data not shown).



Number/Frequency of Visits to Pet Shops With Exotic Animals – by Segment



The Rational and Emotional Bond segments are the most likely to have visited a pet shop with exotic animals in the past 12 months.

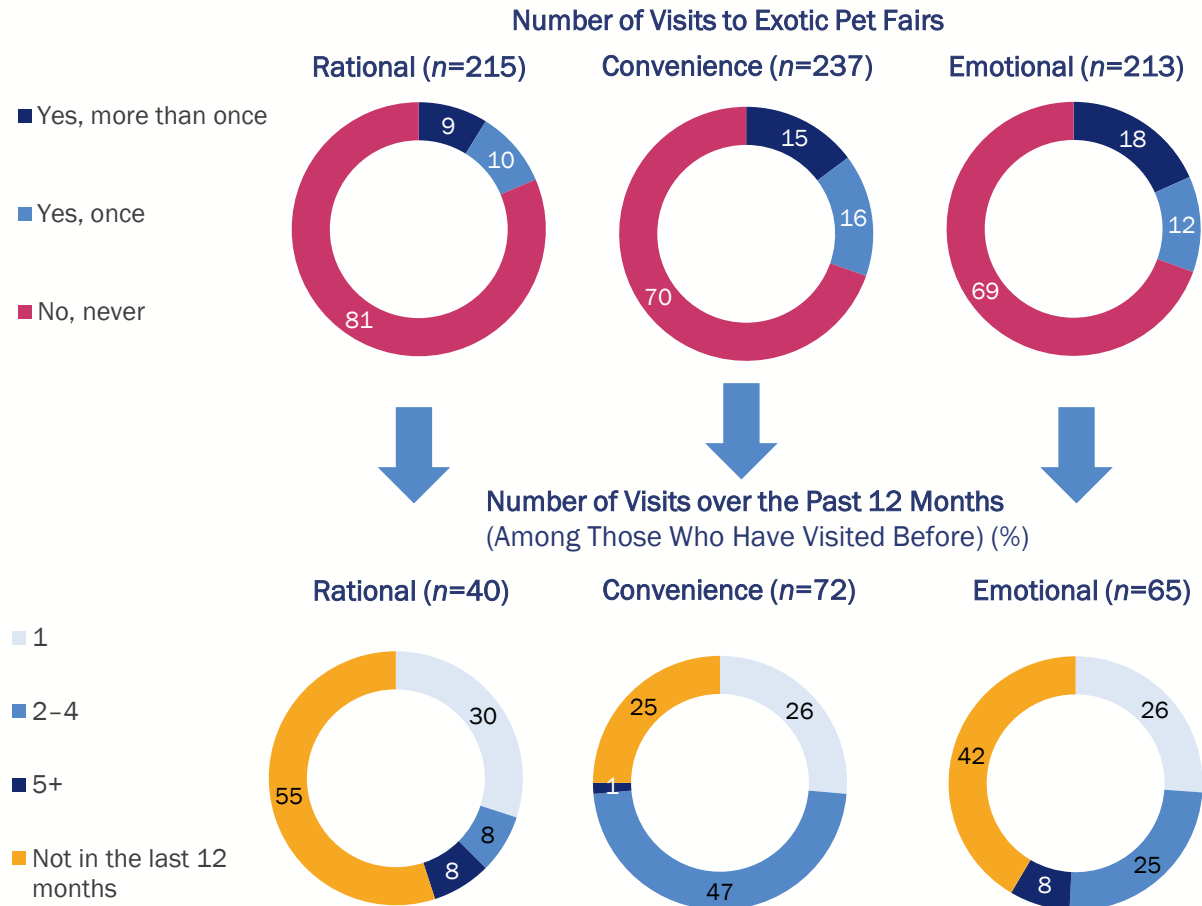


Number/Frequency of Visits Exotic Pet Fairs – by Segment



The Rational segment is the least likely to have visited exotic animal pet fairs or to have visited the most frequently in the past 12 months.

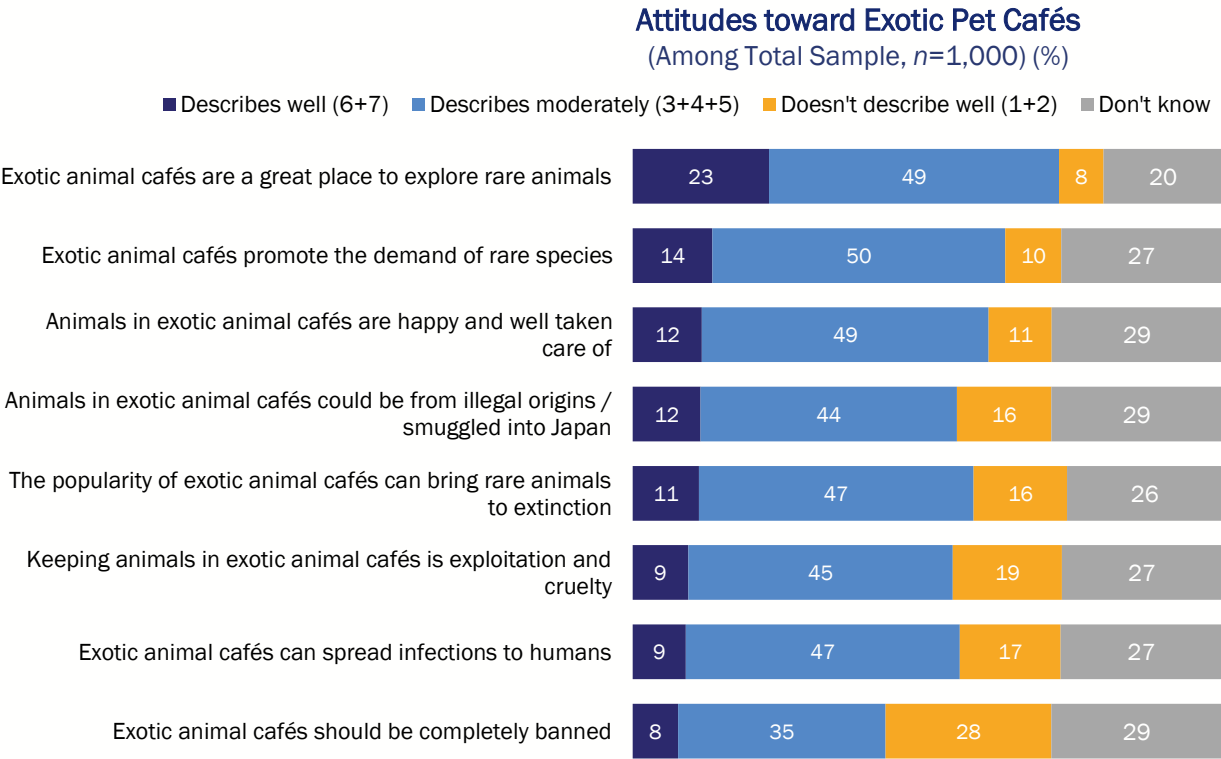
The Convenience segment visits exotic animal pet fairs most frequently.



Attitudes toward Exotic Pet Cafés – Owners, Intenders, Non-owners/Non-intenders



Non-owners/Non-intenders are significantly more likely than other groups to say that animal cafés are a source of exploitation and cruelty, and that they should be banned compared to the total sample.



*1 = Owner
*2 = Intender
*3 = Non-owner/Non-intender

Mean scores			
Total	1*	2*	3*
4.6	4.7	4.8	4.2
4.2	4.1	4.3	4.2
4.0	4.1	4.3	3.5
3.8	3.7	3.6	4.1
3.8	3.8	3.6	4.0
3.6	3.5	3.4	3.9
3.6	3.6	3.5	3.8
3.1	3.1	2.8	3.7

Significantly higher than all other segments and total

Reasons for Visiting Exotic Pet Cafés – by Segment

All segments primarily visit exotic pet cafés for the healing nature and to play with the animals. The Rational segment is the least likely to visit to research buying a pet. They are the most likely to visit to because someone else made the decision.

Reasons to Visit an Exotic Pet Café					
(Among Those Who Have Been to an Exotic Animal Café, n=221) (%)					
		Segment			
		Those Who Have Been to an Exotic Animal Café	Rational	Convenience	Emotional
1	For the healing nature of the animals	48	55	28	61
2	To play with the animals	48	50	39	55
3	To research buying a pet	23	17	24	29
4	To show to somebody else	13	15	9	13
5	Somebody else made the decision	13	21	9	9
6	Meeting new people	10	3	20	6
7	To take photos for social media	9	2	19	7

Top three reasons per age group

*Small sample size

Q23. Why did you visit this exotic pet cafe?

Base: Those who have been to an exotic animal café, n=221

Reasons for Visiting Exotic Pet Cafés – Owners, Intenders, Non-owners/Non-intenders

Owners and Intenders visit exotic animal cafés for similar reasons.

Reasons to Visit an Exotic Pet Café
(Among Those Who Have Been to an Exotic Animal Café, n=221) (%)

		Segment			
		Those Who Have Been to an Exotic Animal Café	Owners	Intenders	Non-owners/ Non-intenders
		(n=221)	(n=98)	(n=111)	(n=12)
1	For the healing nature of the animals	48	50	45	Sample size too small
2	To play with the animals	48	43	52	
3	To research buying a pet	23	29	19	
4	To show to somebody else	13	15	10	
5	Somebody else made the decision	13	10	15	
6	Meeting new people	10	12	8	
7	To take photos for social media	9	14	5	

Top three reasons per age group

*Small sample size

Q23. Why did you visit this exotic pet cafe?

Base: Those who have been to an exotic animal café, n=221

**Exotic Pets, as Defined by This Study
and Presented to Participants**

Category	Taxa
Reptile	Snake
	Lizard (e.g., geckos, bearded dragons, chameleons, iguanas, monitors, skinks)
	Turtle/tortoise
	Other reptile (e.g., crocodiles, caimans)
Bird	Parrot (African grey parrots, macaws, cockatoos, galahs)
	Birds of prey (e.g., owls, hawks, falcons)
	Other non-domestic birds (e.g., munias, starlings, hummingbirds, cordon-bleus, toucans, penguins, pelicans, peacocks)
Amphibian	Newt/salamander
	Toad/frog
Mammal	Exotic rodent (e.g., dormouse, chinchilla, degu, prairie dog, squirrel, capybara, flying squirrel)
	Exotic feline (e.g., civet cats, sand cats)
	Primate (e.g., slow lorises, galagoes, common marmosets)
	Sugar glider
	Otter
	Hedgehog
	Ferret
	Meerkat
	Fennec fox
	Other exotic mammal (e.g., wallaby, sloth, badger, binturong, racoon)
Other	Other exotic animal (please specify)

**Domestic Pets, as Defined by This Study
and Presented to Participants**

Category	Taxa
Bird	Domesticated small bird (e.g., Parakeets, Java sparrow, Budgerigars, Bengalese finches, Canaries, Diamond doves)
	Poultry (e.g., duck, chicken)
Mammal	Domestic dog
	Domestic cat
	Domestic rodent (e.g., mice, rats, hamsters, guinea pigs) and rabbits
	Other domestic mammal (e.g., Goat, Pig, Sheep, Alpaca, Horse)
Fish	Fish
Invertebrates	Insects (e.g. Beetles), Crustaceans (e.g. Crayfish) , Molluscs (e.g. Snails), Spiders, Scorpions
Other	Other domestic animal (please specify)

Analysis Deployed: The MaxDiff Question (1)

MaxDiff Description: Using the MaxDiff Question

MaxDiff (Maximum Differentiation Scaling) builds upon a long-established theory about how people make choices. It assumes that participants' choices are more relative/comparative than absolute.

MaxDiff is an approach for capturing relative scores (e.g., importance, preference, agreement, attitude) for a set of items.

With MaxDiff, participants are shown a set of items and are asked to indicate the item that best describes their opinion, and the item that least describes their opinion, for example:

➡ Please consider how important different features are when selecting a fast food restaurant.

Considering only the features below, which is the Most Important and which is the Least Important?

Most Important		Least Important
<input type="radio"/>	Reasonable prices	<input type="radio"/>
<input type="radio"/>	Healthy food choices	<input type="radio"/>
<input type="radio"/>	Has a play area	<input type="radio"/>
<input type="radio"/>	Clean bathrooms	<input type="radio"/>

The items are grouped using MaxDiff algorithm in order to ensure that each item and each pair of items is shown an equal number of times. Usually, participants see each pair of items at least two or three times. A list of 20 attributes typically requires 10 to 16 sets/screens.

Item scores are then estimated on a respondent level using a Hierarchical Bayes (HB) method, and transformed to a numeric scale, e.g., a 5- or 10-point scale. The larger the score, the higher the importance of the item for that respondent.



Analysis Deployed: The MaxDiff Technique (2)

Reasons for Using MaxDiff in This Research

Using MaxDiff provides a better differentiation between the item importance compared to rating scales, mainly because:

- With rating scales, there can be many straight-line answers, such as giving ratings of 3 to all 20 items on a 5-point scale;
- Cultural biases in the use of the scale. For example, participants in China tend to use the top portion of the scale, while participants in Germany tend to use the middle or bottom portions of the scale;
- Research has shown that importance scores obtained with MaxDiff range from 0 to 10 compared to the range from 5 to 8 obtained with stated importance ratings (e.g., everything is important).

What Can We Do with MaxDiff Scores?

MaxDiff scores could be reported in a similar way to reporting rating scales (e.g., averages, percentages, crosstabs, bar charts). With MaxDiff, we can measure importance, preference, performance, and many other variables.

MaxDiff scores, if they result from “most important” vs “least important” scales, could replace other predictive modeling, e.g., regression and path analyses which we normally use to extract derived importance scores. This is due to the fact that this method, in this particular case, already indicates importance in driving the desired outcome. MaxDiff scores allow for any kind of statistical analysis we could consider doing with responses obtained using rating scales.

Methodology Overview: Rounding and Data Quality

Rounding

- Numbers and percentages shown at first decimal in tables and graphs in this report are the result of rounding.
- Rounding to the nearest integer has been applied and may add up to more or less than 100%.
- However, calculated margin of error is valid only upon the assumption that the sample is truly random, with every member of the population having an equal chance of being included in the survey. This assumption is not met in the majority of contemporary opinion polls because the samples are drawn using complex systems of stratification and quotas or are obtained from panels of volunteers, as in the case of this study.

Questionnaire and Participants' Quality

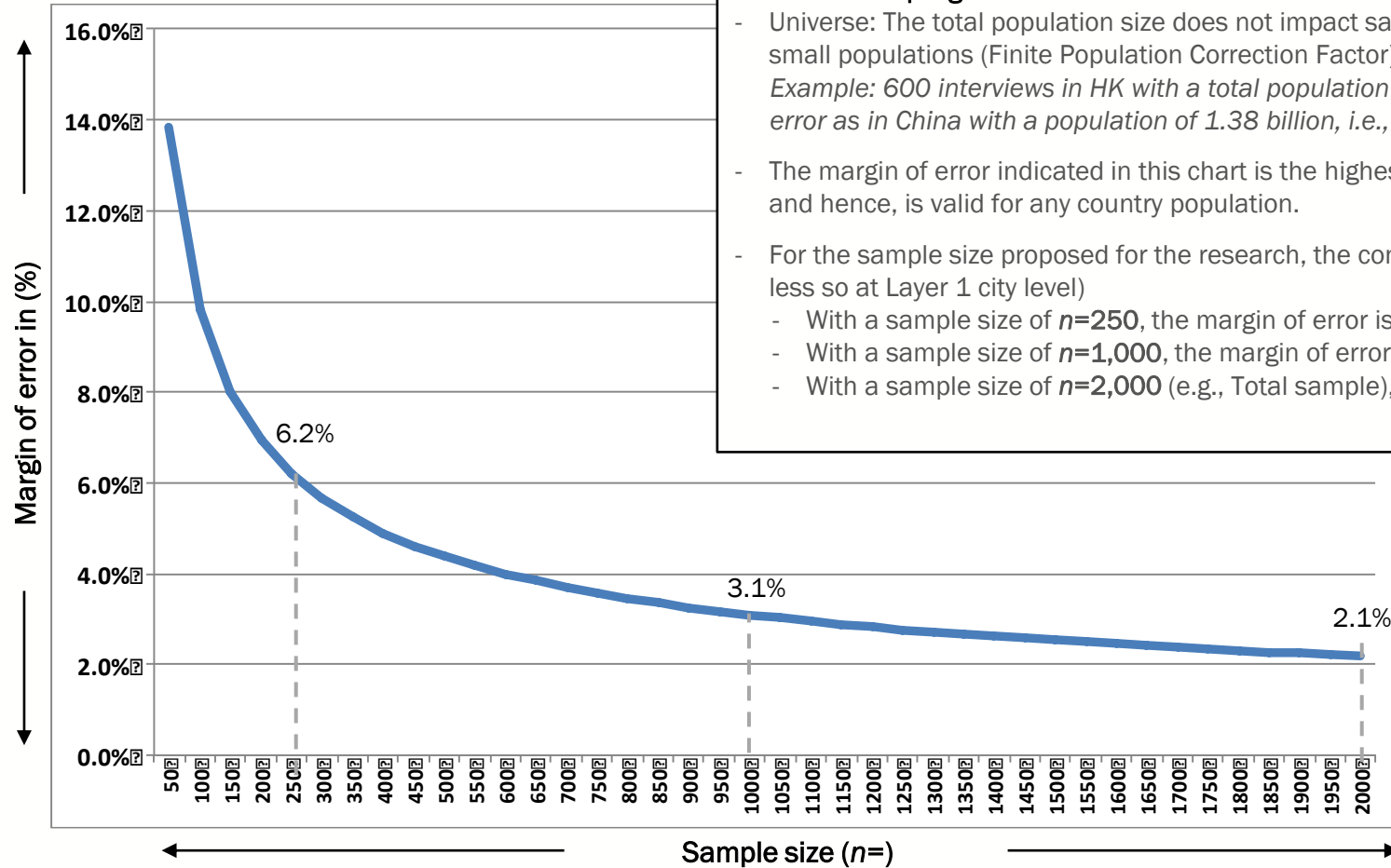
- To assure that participants answer honestly and “neutral” when they are qualified for the survey, it is important that the survey topic is not mentioned in the invitation.
- The email received by the potential participants only mentions the general topic of “lifestyle and shopping practices.”
- Even though margin of error is not applicable to non-random samples, it can be used as a rough tool to assess patterns in the collected data. For example, a 5-percentage point difference between males and females in a sample of 1,000 participants may indicate a pattern, while a 10-point difference in opinion between smaller demographic groups may not.

Margin of Error: Definition

In reports on public opinion polls, a “margin of error” is often stated. The margin of error estimates the accuracy of the sample compared with the entire population. A margin of error of plus or minus 3 percent at a 95 percent confidence interval would mean that if we examined 100 truly random samples of a particular size, in 95 of such samples the figures would be within three percentage points of the “true” answer that would result from interviewing the entire population. The larger the sample, the lower the margin of error (see illustration on the next page).

- Where the terms “significantly more” or “significantly less” are used in this report, we are referring to statistical significance at a confidence level of 95% ($p < 0.05$).

Margin of Error in Surveys



About the Sampling Error:

- Universe: The total population size does not impact sampling error, except for small populations (Finite Population Correction Factor).
Example: 600 interviews in HK with a total population of 7.2 million has the same error as in China with a population of 1.38 billion, i.e., 4.0%.
- The margin of error indicated in this chart is the highest for any population size, and hence, is valid for any country population.
- For the sample size proposed for the research, the confidence level is strong (but less so at Layer 1 city level)
 - With a sample size of $n=250$, the margin of error is 6.2%
 - With a sample size of $n=1,000$, the margin of error is 3.1%
 - With a sample size of $n=2,000$ (e.g., Total sample), the margin of error is 2.1%

Segmentation Methodology: Discriminant Function Analysis

Segmentation

- Segmentation allows us to group participants according to statistically significant similarities in their perceptions, outlooks, drives and / or deterrents to a topic. Groups are identified that display distinct traits when compared with other groups e.g., one group may have an aversion to price and a desire for easy-to-care-for animals that another group does not share. These price-conscious, convenience-orientated participants may share other traits and looking at how they respond to certain questions compared to non-price-conscious participants can help to target certain behaviors.

Discriminant Function Analysis

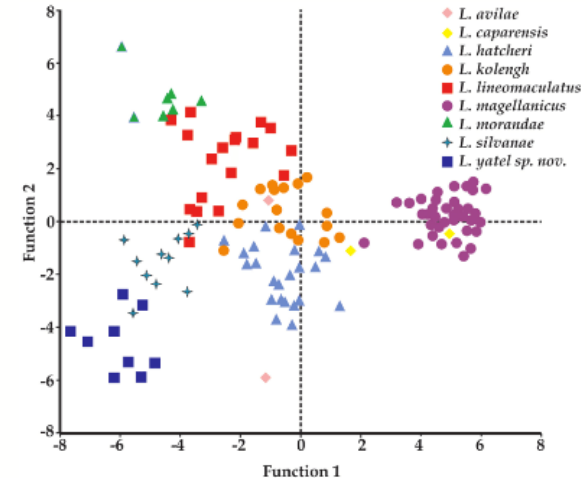
- In order to create the segments, we used a statistical algorithm extracted using a Discriminant Function Analysis (DFA).
- DFA is a statistical method that is used to understand the relationship between a “dependent variable” and one or more “independent variables.” A dependent variable is the variable that a researcher is trying to explain or predict from the values of the independent variables. It is a statistical procedure that classifies unknown individuals and the probability of their classification into a certain group (such as sex, species, or ancestry group). For our studies, we use a DFA to classify

respondents into their respective segments using inputs from a range of questions. By assigning values to certain responses and plotting data points on a graph, patterns start to emerge (see example).

- For detailed information, please see:
https://en.wikipedia.org/wiki/Linear_discriminant_analysis

An example of a DFA used to test how genetically distinct different species are from each other is shown here:

Source: Abdala, et al. (2014). New Patagonian species of *Liolaemus* (Iguania: Liolaemidae) and novelty in the lepidosis of the southernmost lizard of the world: *Liolaemus magellanicus*. *Zootaxa*, 866(4)



Segmentation Methodology: Discriminant Function Analysis

Segments were derived from two questions that assess the drivers, deterrents and motivations of exotic pet Owners and Intenders. Factors which are significantly higher for one group (marked in yellow) were assessed for similarities in perceptions. These factors were then used to form the segments. Factors that are significantly higher for one group but remained very low drivers (e.g., the animal bringing income) were not mentioned in the segments.

Q7. Which of the following are the most important factors and the least important factors you consider when deciding to own a pet [exotic animal]?	Rational	Emotional Bond	Convenience
The animal is bred in Japan	1.8	0.7	1.8
Caring for the animal brings a sense of satisfaction	5.3	6.8	4.0
The animal is rare	0.4	0.5	1.1
The animal is not native to Japan	0.5	0.3	1.0
The animal is cute	6.4	8.3	5.4
The animal has healing properties	6.7	8.6	5.2
The animal is not endangered in the wild	4.6	1.9	2.3
The animal is friendly	5.4	6.5	3.9
The animal can recognize me	4.3	4.6	3.1
The animal is easy to care for	3.7	4.3	5.8
The animal has good hygiene	5.8	5.1	5.0
The animal is not expensive to care for	3.7	3.2	5.3
The animal is popular on social media / tv	0.1	0.3	0.7
Owners of this animal form a community	0.9	1.1	1.0
The animal is accepted by my friends / family	5.8	4.5	3.9
The supplier is well-established	2.4	1.7	1.6
The animal is from the wild	0.7	0.4	1.1
A lot of people own the animal	0.4	0.5	1.2

Q18. Please indicate how much you agree / disagree with these statements in relation to [exotic animal]	Rational	Emotional Bond	Convenience
Expensive to keep and maintain	4.8	4.5	4.3
Vulnerable to various diseases	4.0	3.7	4.0
Is or might be aggressive/dangerous to people	3.4	3.0	3.5
Creates a lot of mess	3.7	3.9	4.1
Attracts attention of other people	3.2	4.3	4.0
Helps me make friends	3.2	3.9	3.7
Positively impacts my health condition	4.8	5.4	4.0
Great to spend time with	6.0	6.3	4.6
Helps me cope with stress	5.1	5.9	4.4
Does or may spread diseases to humans	3.9	3.1	3.9
Amplifies my unique self	3.7	4.5	3.9
Owning [exotic animal] may bring them to extinction in the wild	4.4	3.3	3.8
Owning [exotic animal] may save them from extinction in the wild	3.4	3.6	3.6
Demanding [exotic animal]s may lead to smuggling of the animal from overseas [exotic animal]	5.8	3.8	4.3
[exotic animal]s are much happier living with people than in the wild	3.5	4.2	3.8
Makes me feel happy	6.0	6.4	4.8
My [exotic animal] loves me very much	4.8	5.6	4.1
Brings income	1.6	2.2	2.8
Pets being released can damage the environment	4.8	3.6	4.3
All my family members love [exotic animal] very much	4.6	5.3	4.2
Brings me a sense of novelty	3.8	4.4	4.2



WWF is one of the world's largest and most respected independent conservation organizations, with over 5 million supporters and a global network active in over 100 countries. WWF's mission is to stop the degradation of the Earth's natural environment and to build a future in which humans live in harmony with nature, by conserving the world's biological diversity, ensuring that the use of renewable natural resources is sustainable, and promoting the reduction of pollution and wasteful consumption. www.panda.org

TRAFFIC

TRAFFIC is a leading non-governmental organization working globally on trade in wild animals and plants in the context of both biodiversity conservation and sustainable development. Our team of staff around the world carry out research, investigations and analysis to compile the evidence we use to catalyze action by governments, businesses and individuals, in collaboration with a wide range of partners, to help ensure that wildlife trade is not a threat to the conservation of nature. Unsustainable consumer demand for wildlife products is a leading cause for the threats facing many species across the world. TRAFFIC has been at the forefront of innovation within the field of Social and Behavioural Change (SBC), running various projects with relevant stakeholders targeting specific consumers of a variety of threatened wildlife. TRAFFIC uses the SBC approach that includes market and consumer research to guide campaign design. www.traffic.org



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