



PocketPaw Co: Environment

YOUR PET IN YOUR POCKET

Our team

**David
Pérez**

CEO

Data Science Engineer

**Federico
Falcone**

CFO

Computer Engineer

**Guillem
Escriba**

CEO

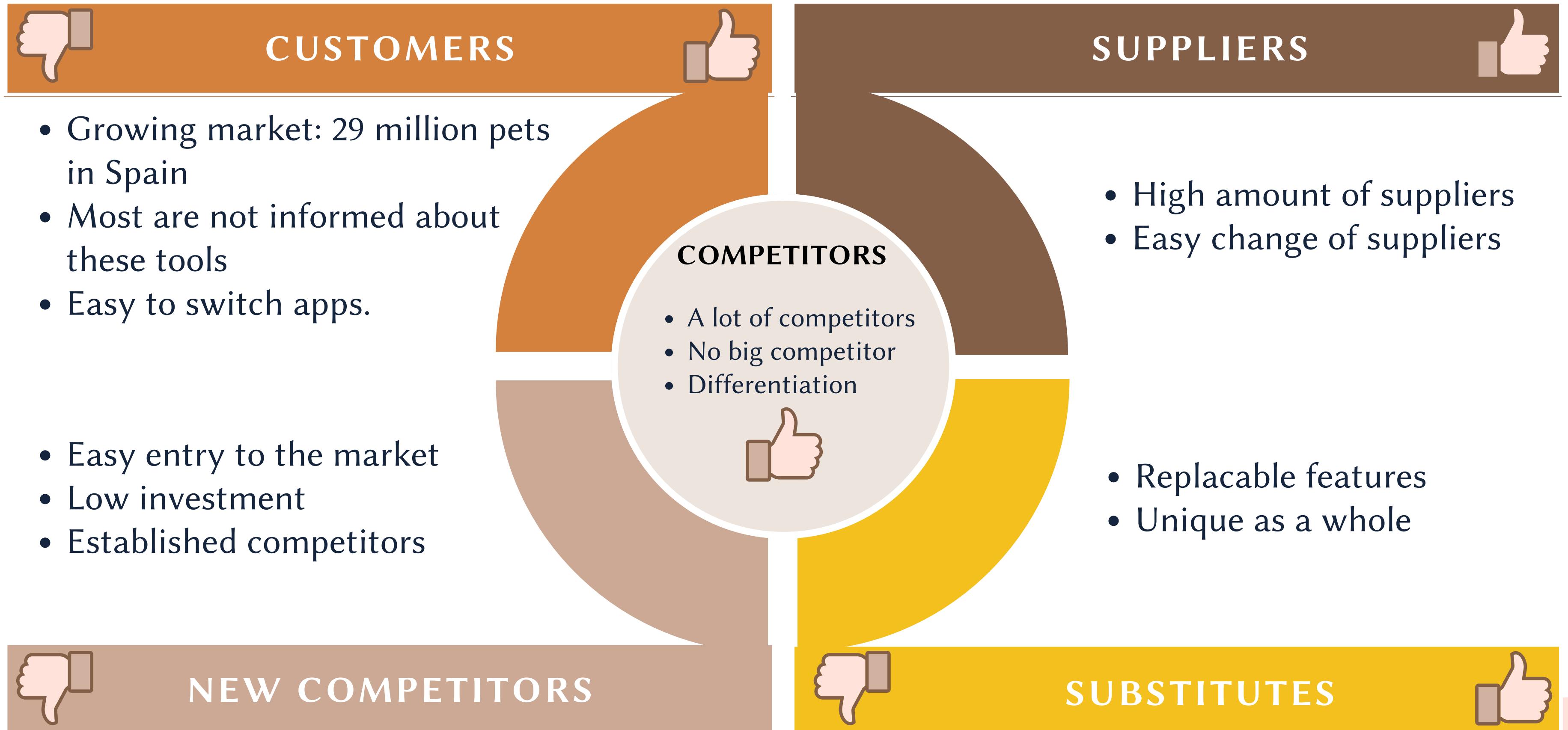
Data Science Engineer

**Oriol
Soler**

GENERAL MANAGER

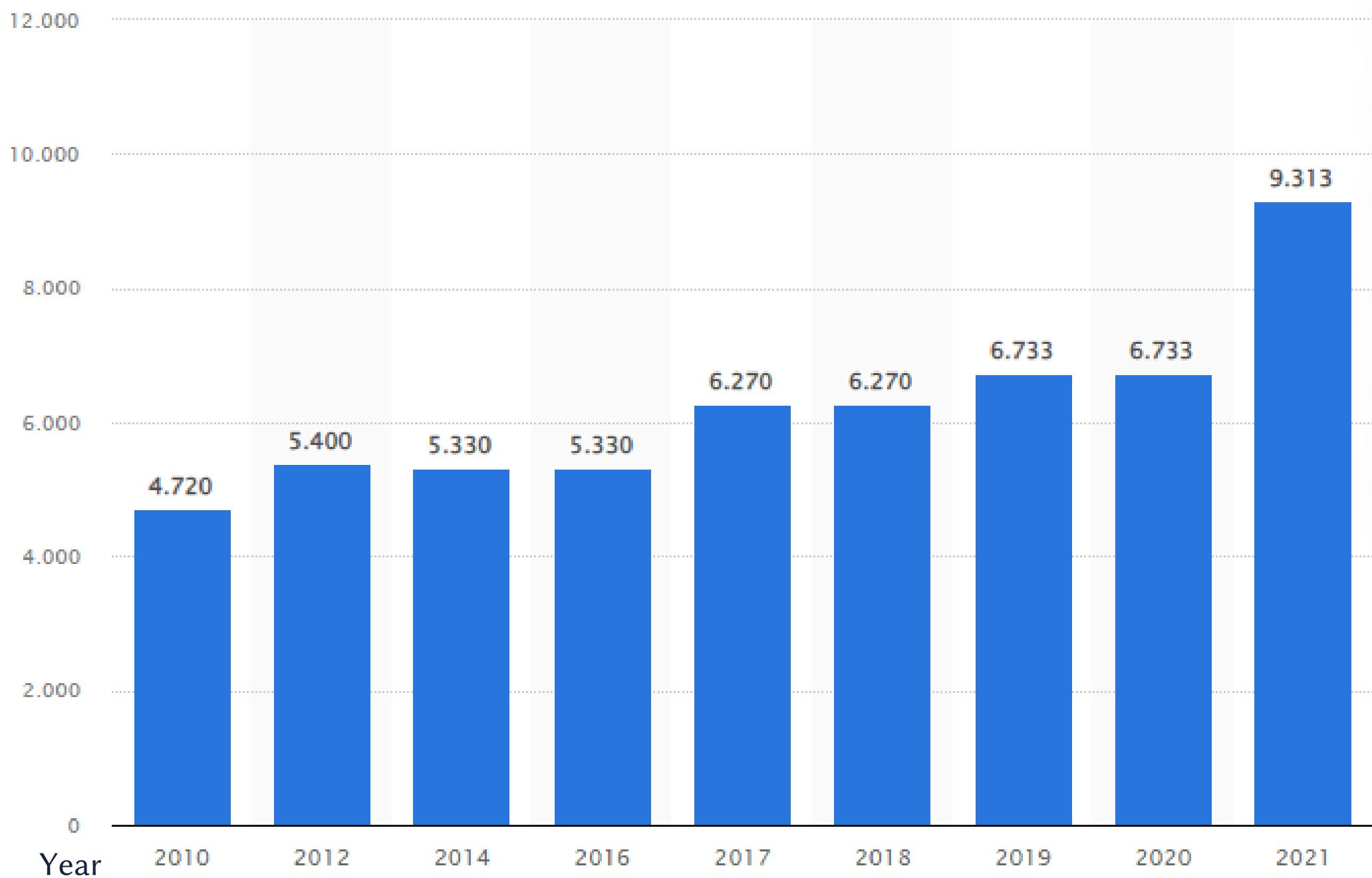
Audiovisual Engineer

Sector attractiveness analysis:



Pet Care Sector in Data:

Number of dogs (in thousands)



- **Moderate growing year by year.**
- Abrupt increase after Pandemic and lockdown.
 - > Post pandemic lives adopted a house lifestyle, which lead to adopting more pets.
 - > So many traditions from Pandemic have come to stay. Telecommuting, online affairs... increase the need of an animal friend in home.

Pet Care Sector in Data:



[MSD in Spain](#) [News](#) [With V for Vet](#) [Contact](#)

[ABOUT US](#) [SP](#)

September 20, 2021

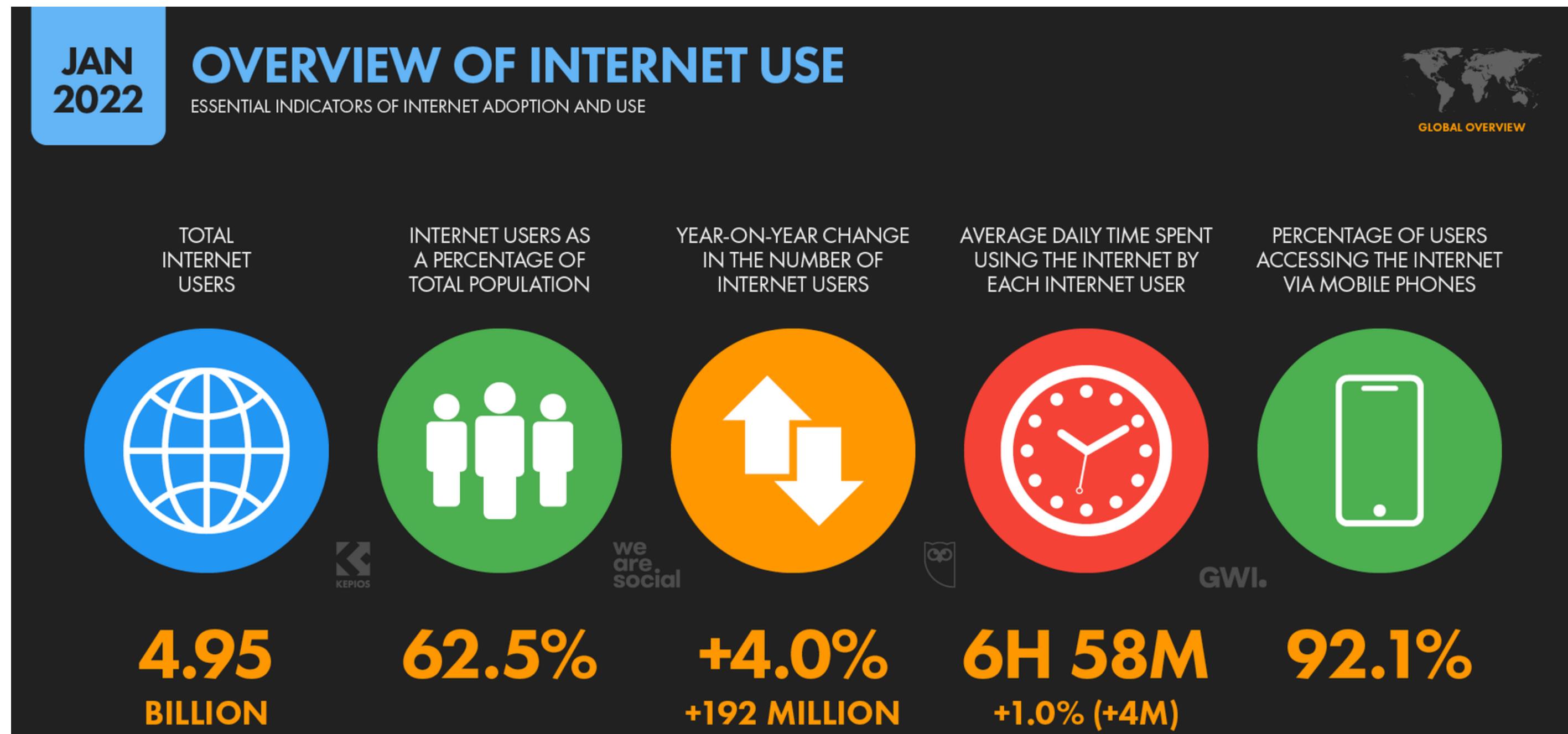
The number of pets in Spanish homes is increasing: one in two families lives with a pet

Currently more than half of Spanish homes live with a pet. According to the Pet Study carried out in June 2021 by Veterindustria in collaboration with the National Association of Companion Animal Food Manufacturers (ANFAAC), 50.2% of families have a companion animal; increasing significantly compared to 2019 (39.7%). Which translates into an increase of more than ten points, consolidating an upward trend in recent years; since more and more people decide to expand their family with a pet.

The dog continues to be preferred with a presence of 33.2% (25.7% in 2019); The average number per household has also increased from 1.42 in 2019 to 1.50 in 2021. The number of households with a cat has also increased (from 11% in 2019 to 17.6% in 2021). The rest of the pets have a presence below 3.5%.

- **Half of Spanish households** have pets, according to MSD Animal Health.

Pet Care Sector in Data:



- More internet engagement through years leads to more potential users.
- Common internet and apps users see with better eyes new apps about monitoring the data of their belongings, like PocketPaw.

SECTOR ATTRACTIVENESS: COMPETITORS - RIVALRY

- So many **small** competitors.
- So many competitors of our **GPS** offer.
- Competitive **pricing**.
- **Competitive advantage:**
 - > Kiwoko distribution,
 - > All features from competitors in one app + unique features.



Differentiation:
11pets - All-in-One



100.000 ↓

Competitive Advantage:
Lower price

Differentiation:
Puppr - Best Training



500.000 ↓

Competitive Advantage:
Specialized service

Differentiation:
Rover - Dog sitters



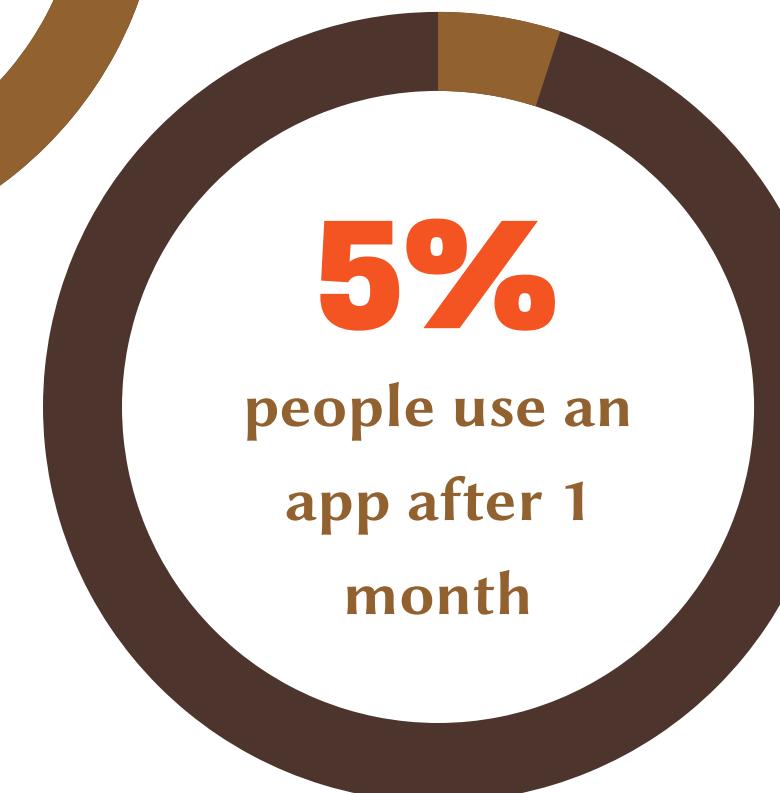
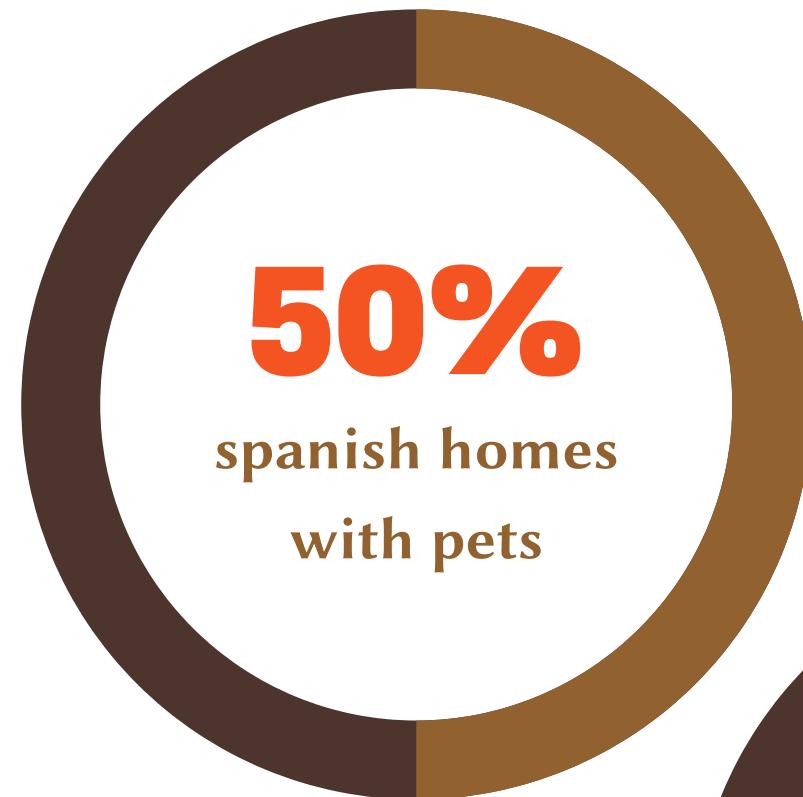
1.000.000 ↓

Competitive Advantage:
Biggest market share

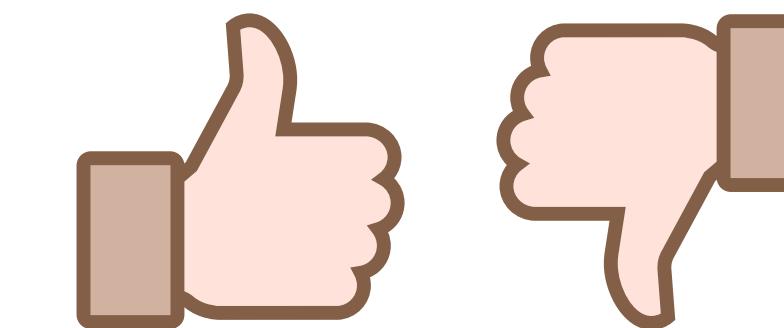
MARKET SHARE:

11pets - Annual Revenue in 2022: \$1.0M - \$2.0M
Rover - Annual Revenue in 2022: \$0.16 B

SECTOR ATTRACTIVENESS: CUSTOMERS - NEGOTIATION



- Market with **high volume** and still growing.
- High customer **leverage**: **No barriers** to switch apps.
- Better customer leverage with PRO version: **tracker GPS**
- There is a **great oportunity** in this sector but it's key to find customers **loyalty**.

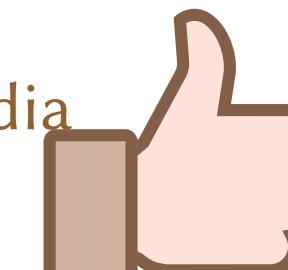
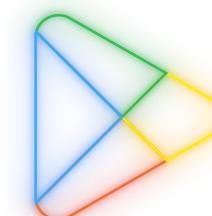


SECTOR ATTRACTIVENESS: SUPPLIERS - NEGOTIATION

- There are **several GPS manufacturers** around the world.
- Very competitive pricing, **as low as 6\$**.
- **Easy to change** between suppliers.
- **High amount** of server providers and hosting.
- Even if is easy to change between hosting providers we plan to have a **long-term contract** with them to reduce expenses.
- **Suppliers have a low negotiation capacity**.
- Usage of virtual stores such as **Google Play** or **AppStore** to provide download facilities of our app. Increments a little negotiation leverage.
- We would advertise the app in Google Ads and Social Media like Instagram and Facebook.



global  sources



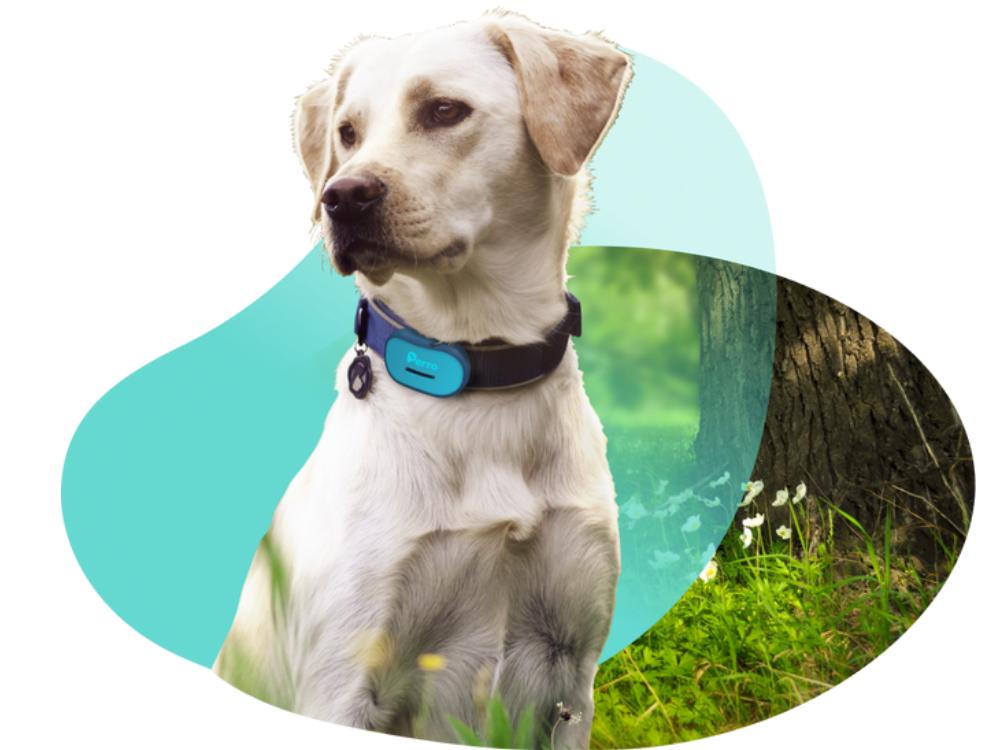
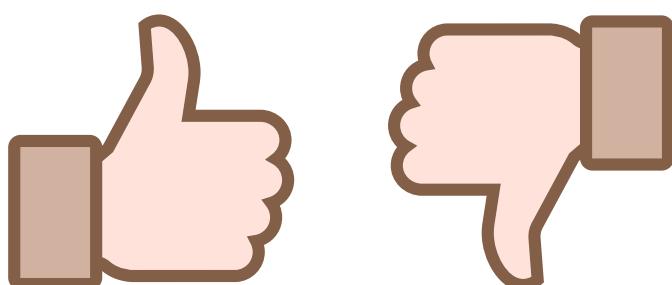
SECTOR ATRACTIVENESS: NEW COMPETITORS

- It is a **growing industry** with high demand.
- The **entry barrier** is very low for new competitors. For a initial development and maintenance of a similar service it is estimated an initial investment of 35.000\$.
- Main difficulty to design a transcendental app with only functional and useful features.
- There are some **well established competitors** that make hard to gain a market share.
- In order to **let new competitors aside** the market we can negotiate with other big players such as Rover.

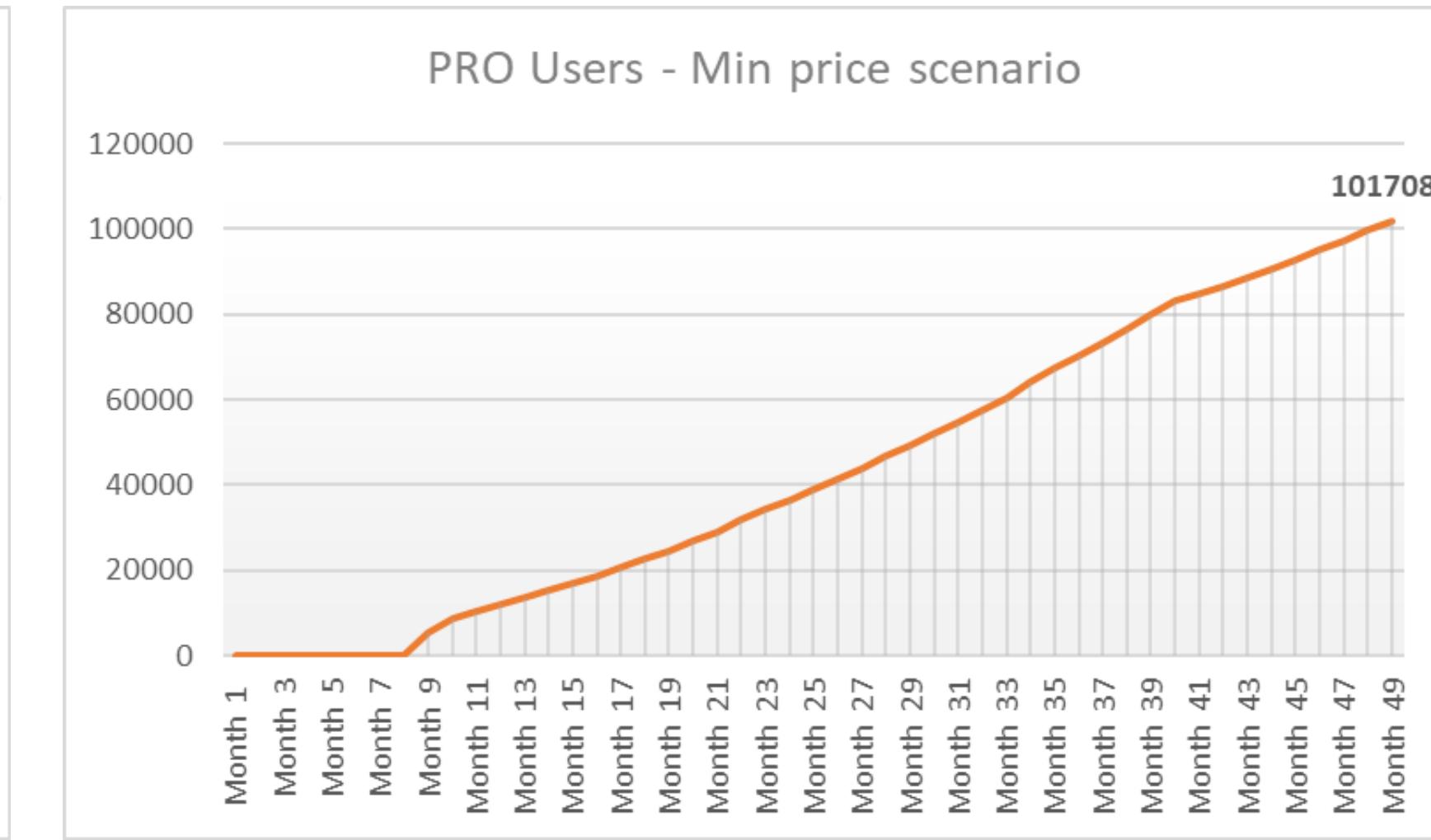
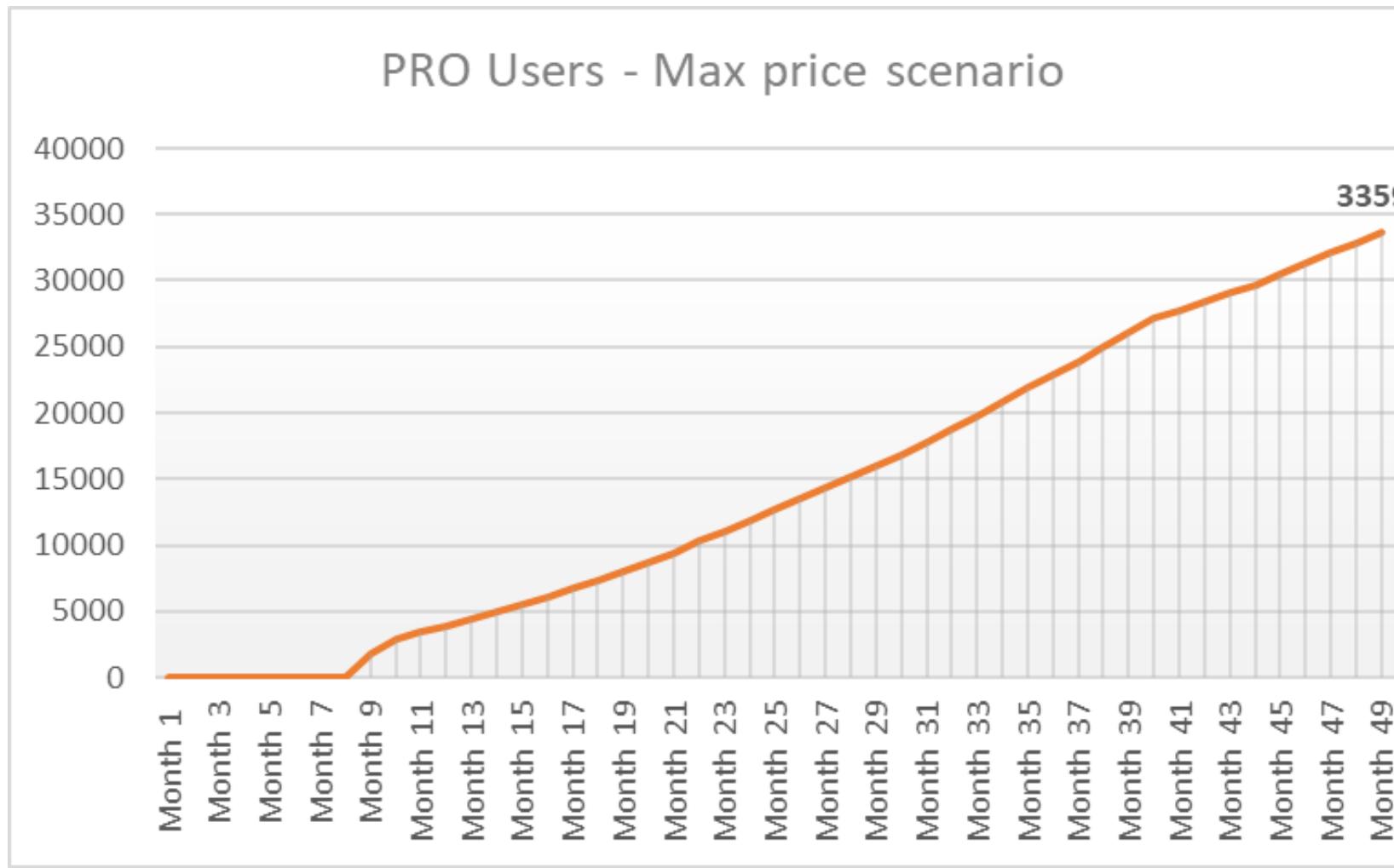


SECTOR ATTRACTIVENESS: SUBSTITUTE PRODUCTS

- We offer a **unique** value proposition by **combining the most useful pet services.**
- Social media platform value.
- Powerful collaboration with **KIWOKO**.
- Some features can be easily **individually** substituted.
 - > Traditional methods
 - > Cheap GPS everywhere



SCENARIOS: Price Variation



SECTOR ATTRACTIVENESS

COMPETITORS - RIVALRY:	
CUSTOMERS - NEGOTIATION LEVERAGE:	
SUPPLIERS - NEGOTIATION LEVERAGE:	
NEW COMPETITORS:	
SUBSTITUTE PRODUCTS:	
<u>SECTOR ATTRACTIVENESS:</u>	

- Technology insertion in pet care
- Bring people closer to their pets
- Help people with their first pets

SOCIO-CULTURAL

ECONOMIC

LEGAL

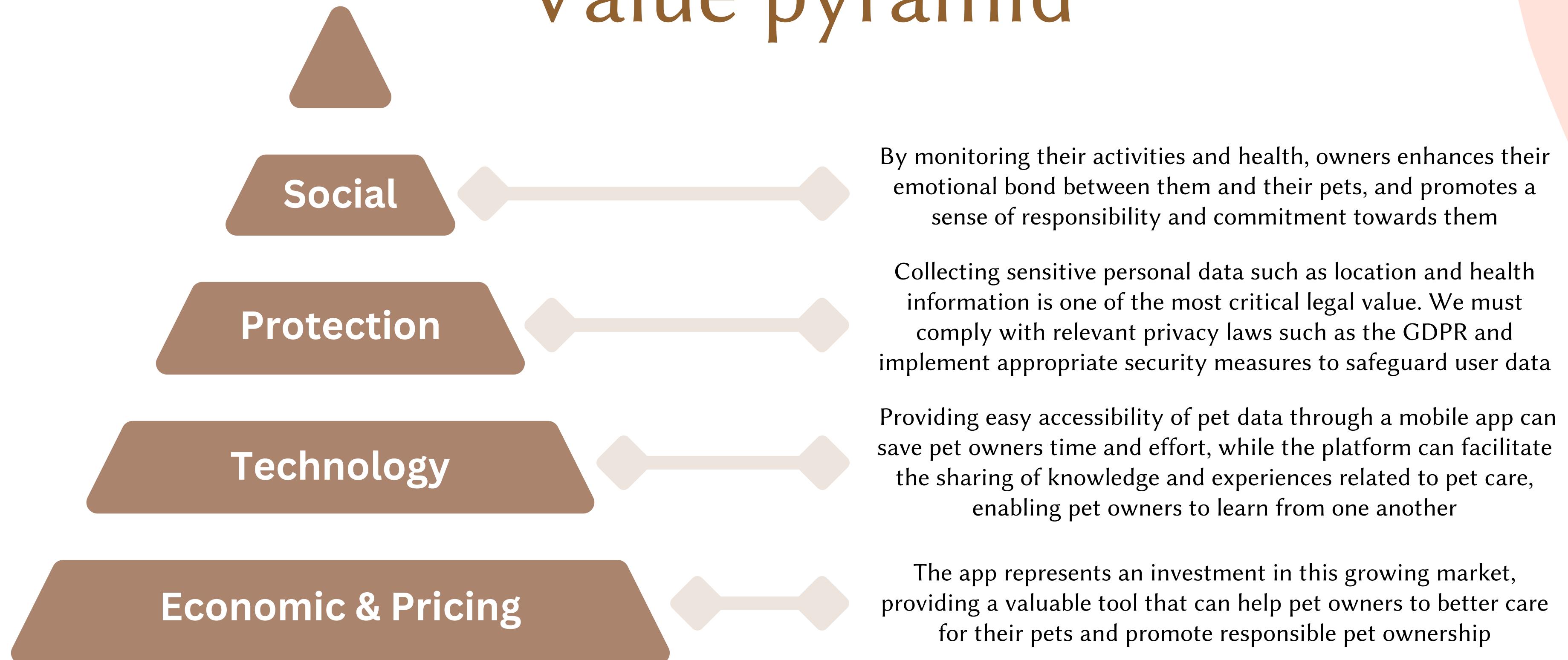
TECHNOLOGICAL

- Protect the users privacy.
- Follow EU general data protection regulation
- Enforce the animal care law enforcement

- High influence of tracking technology in global economy.
- Support useful investment in pet care.

- All the data about your pet in your phone.
- Thanks to huge social media we provide a greater common knowledge.

Value pyramid



Internal

S W

External

O T

Strength

- Recurring revenue
- Integration with other pet-related services
- Scalability

Weakness

- Dependence on technology
- Crowded market
- Limited target

Internal

SW

External

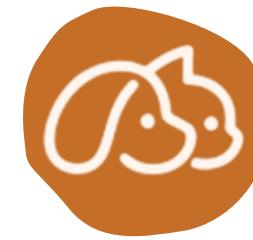
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Opportunities

- ▶ Expansion into new markets
- ▶ Development of new features
- ▶ Building a community

Threats

- ▶ Technological advancements
- ▶ Economic downturn
- ▶ Legal and regulatory issues



Thanks for your
participation!

EMAIL

info@pocketpaw.com

WEBSITE

www.pocketpaw.com

SOCIALS

 [@pocketpaw](https://www.instagram.com/pocketpaw)

BACK UP SLIDES

Q

EL CORREO

Demographic bleeding: Spain has more homes with dogs than with children

World Dog Day 6,265,153 children under the age of 14 live in our country, while the number of registered dogs exceeds 7 million. In recent decades, pooches have gone from being animals with a specific function to being life companions, family members and part of the bank account.

- New spanish lifestyle: Adults prefer pets rather than children.
- All of this helps the faster growing of the market in the post-pandemic years.



Spanish newspaper - EL CORREO, July 2021

BACK UP SLIDES: The Pandemic effect



- There are already twice as many dogs and cats as there are children under 15 years of age.



Laura Arago
Barcelona

01/25/2022 06:00 | Updated 01/25/2022 08:21



The first thing Noemí did when she was able to set foot on the streets of Madrid again in May 2020 was move to a bigger apartment and adopt Finn, a three and a half-year-old greyhound. Forced teleworking and the anguish of feeling that everything could turn upside down at any moment pushed her and her partner to do what they had always wanted. Alba, from Rubin, on the other hand, did not have to wait or lose confidence to adopt Drac, a newborn kitten that needed continuous attention in order to survive. "Without a pandemic I would not have been able to, but since we were locked up I had all the time in the world to take care of him."

Neither Noemí's decision nor Alba's was a whim. They both wanted to adopt and the pandemic only precipitated what sooner or later would have ended up happening. For years there have been more and more pets in Spain, but the coronavirus has further accelerated this trend. From 2019 to 2021 the number of domestic dogs and cats has grown by 44%, going from 10.5 to 15.1 million, while in the previous two years it had only grown by 17%. The expectation of the sector is that the figures continue to rise in the coming years as they have been doing up to now.

Spanish newspaper - LA VANGUARDIA, January 2022

- More data about the pandemic effect on the spanish people tendency about pets, now from La Vanguardia, one of the most important newspapers in Spain.
- After the pandemic, the number of pets increased by 44%. After, not only during, since it lead to a new lifestyle closer to home, and this is still present in the most part of the society.