

Evaluation Research on Consumer Demand for High-risk Exotic Pets in Japan

A Report by GlobeScan
Incorporated

June 2026



Prepared for



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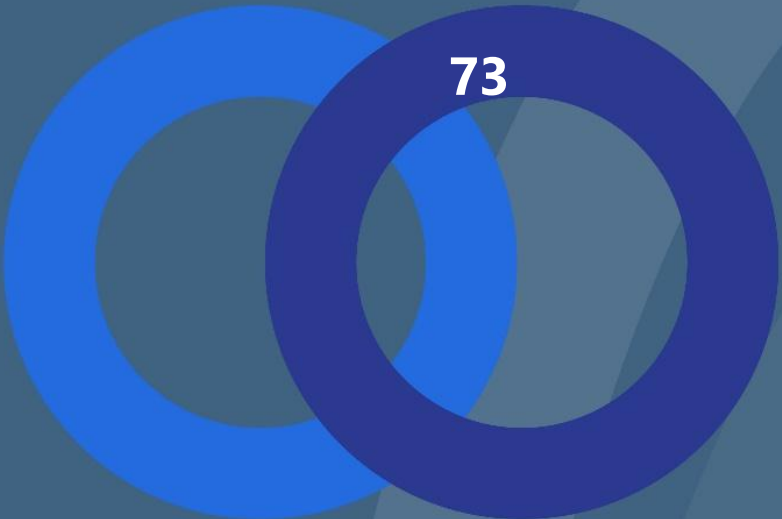
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Project: 4350



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1. Background and Research Design



Objectives and Methodology

About This Survey

- $n=1,821$ participants in Japan
- Participants recruited via online panel
- Online survey conducted in Japanese
- Interview length: approximately 10 minutes
- Split sample
 - 749 who recall seeing the campaign
 - 1072 who have not seen the campaign or don't know if they recall seeing it
- Sample designed and weighted* to match national census data in terms of Age, Gender, Region, and Education
- In field January and February, 2026

Research Objectives

- Assess campaign reach and how campaign-aware audiences respond to campaign messages
- Assess differences in attitudes and intentions between those who recall seeing the campaign and those who have not to understand perceptions of:
 - Social acceptability of owning focus pets
 - Desire or intention to own focus pets
 - Awareness of the campaign messages
- Identify patterns consistent with campaign awareness, including shifts in attitudes, norms and intentions.
- Generate evidence to inform campaign refinement and future evaluation design

**Unweighted bases are shown in the report*

Interpretation

Interpretation of This Survey

This is a post-campaign snapshot that helps to understand campaign reach and how campaign-aware audiences respond.

- **What it can do:** describe reach and recognition; profile who recalls seeing the campaign; surface patterns in attitudes, intentions and perceived norms among campaign-aware vs not.
- **What it can't do:** prove the campaign caused those differences, because exposure is not randomly assigned. Results should be read as associations that help diagnose campaign reach and audience response.

Where relevant, we've highlighted alternative explanations (e.g., baseline differences in interest/experience) alongside the observed patterns.

Classifications for Groupings

Pet ownership, campaign exposure, and interest in animal interaction are based on the following questions:

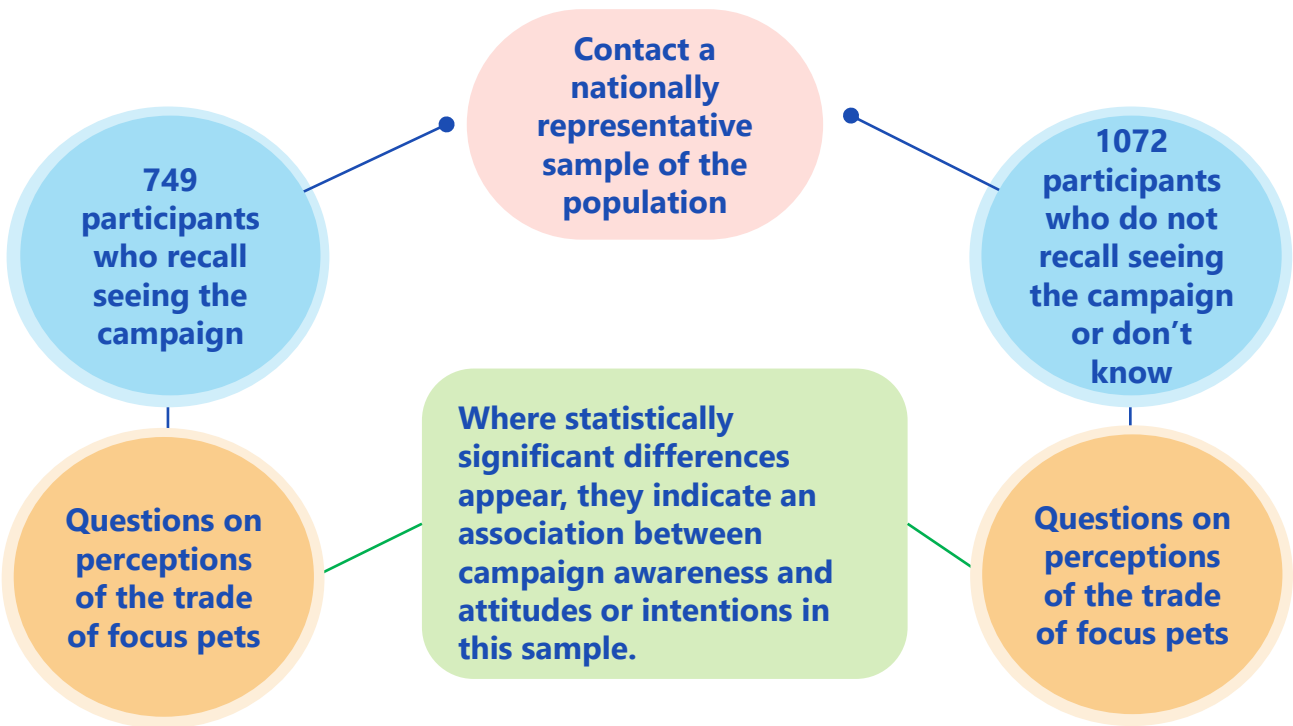
- **S1.** Do you own any pets?
- **S5** Have you ever seen any of the following campaigns?
- **Q3.6.** How much would you enjoy interacting with the focus pets (e.g., holding or playing with them)?

Interest in animal interaction is based on the following combinations of responses to Q3.6:

- **High interest** – “I would enjoy it very much” and “I would enjoy it a little”
- **Low neutral interest** – “I would not enjoy it at all”, “I would not enjoy it very much” and “I don't know”
- **Low interest** – “I would not enjoy it at all”, “I would not enjoy it very much”

Research Design

- This study uses a post-campaign comparison to understand how people who recall seeing the campaign differ from those who do not. The findings are best read as diagnostic patterns that help us understand reach, audience profile, and how campaign-aware audiences respond to the campaign, rather than as indicating a direct causal impact.
- A nationally representative sample was divided into two groups based on campaign exposure: those who recall seeing the campaign and those who do not. Both groups were asked the same questions measuring perceptions of ownership, including interest in ownership, and perceived social acceptability. Where statistically significant differences appear, they indicate an association between reported campaign awareness and responses in this sample.



Note on terminology

Throughout this report, “seen the campaign” refers to participants who *reported recalling* the campaign when asked. This is a measure of recall, not verified exposure. Some participants in the “haven’t seen the campaign” group may still have been exposed, but did not notice it or do not remember seeing it.

The seven species/taxa featured in the campaign were referred to as “high-risk exotic pets” in communications to the general public, but were labeled as “focus pets” in this study to maintain neutrality.

As there may be demographic differences in who has seen the campaign and who has not, quotas are set on the fallout among the full population contacted, not on those who recall seeing the campaign and those who have not.

Indicator questions assess desire to own a focus pet, attitudes toward ownership (including drivers and deterrents), perceived social acceptability, and likelihood of acquiring a focus pet in the next 12 months.

Incidence Rate of Having Seen the Campaign

Based on the total number of people screened to achieve the final sample, we estimated the demographic profile of those who had seen the campaign. Overall, 8.6% of participants reported having seen the campaign. Campaign exposure was more common among females aged 35–44, those with medium levels of education, and those with higher household incomes.

Gender

	% Seen
Male	6.8%
Female	10.4%
Total	8.6%

Age

	% Seen
18-24	11.6%
25-34	9.8%
35-44	14.9%
45-54	12.6%
55-64	3.3%
65+	4.6%
Total	8.6%

Education

	% Seen
Low	5.6%
Medium	6.9%
High	12.8%
Total	8.6%

Income

	% Seen
Low	5.9%
Medium	12.8%
High	14%
Prefer not to say	6.3%
Total	8.6%

Location

	% Seen
Hokkaido	7.8%
Tohoku	14.5%
Kanto	8.7%
Chubu	6.5%
Kansai	11.5%
Chugoku	7.2%
Shikoku	5.7%
Kyushu & Okinawa	6.0%
Total	8.6%

2. Executive Summary



1

Establishing Campaign Reach and Recognition

Strategic Reflection

This evaluation confirms that the campaign is achieving measurable reach within the Japanese online population surveyed. Based on the full screening required to achieve the final sample, 8.6% of participants reported having seen the campaign (screened base n=11,960), indicating the campaign is reaching a meaningful minority rather than remaining niche or invisible. *(Slide 8)*

What this unlocks

- A clear diagnostic foundation for understanding who is recalling the campaign and how campaign-aware audiences respond, while recognising this is a recall-based comparison rather than verified exposure.
- Exposure is primarily digital, particularly via YouTube (46.9%) and X/Twitter (32.2%), which is consistent with the campaign's predominantly digital media placement and the online nature of the survey. *(Slide 68)*
- An understanding of exposure intensity: most campaign-aware participants report seeing the campaign once or twice, with repeated exposure less common. *(Slide 68)*

Recommendation

Position the campaign as successfully reaching audiences through digital channels, and use the recall profile as a guide for where further testing or targeting refinement is likely to be most impactful.

2

Persisting Openness and Elevated Engagement Among Campaign - Aware Audiences

Strategic Reflection

Participants who report higher consideration/intention to own focus pets also tend to report higher interest in interacting with them and are more likely to recall the campaign. These relationships are most pronounced among high-interaction-interest audiences. However, as interest in interaction, ownership intention, and campaign recall co-occur, the findings should be interpreted as associative patterns rather than indicating any directional or causal relationship. Lower exposure (1-3 times) may stimulate demand among high-interest audiences, as their greater openness makes them more responsive even to limited levels of exposure, while higher exposure may shift attitudes in line with campaign goals.

What this unlocks

- Interest in interacting with focus animals remains a strong predictor of openness to owning them. Campaign recall tends to sit on top of this existing pattern rather than fundamentally changing it. *(Slide 25, Slide 31)*
- Participants who recall the campaign generally show stronger ownership consideration/intention and more positive attitudes toward keeping focus pets. However, higher exposure (e.g., four or more times) may begin to show declining intention or more negative perception even in high-interest participants. *(Slide 24, Slide 29, Slide 33, Slide 45, Slide 49).*
- The observed patterns may reflect both (1) pre-existing interest which drives recall, and (2) some reinforcement of interest at lower exposure levels, with potential corrective effects emerging only at higher exposure.

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2

Persisting Openness and Elevated Engagement Among Campaign - Aware Audiences

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- Self-reported exposure may not fully reflect actual exposure, and campaign elements (e.g., visuals and “pet”-related framing) may have increased attention and engagement, particularly among already interested audiences. This increased attention may have led to increased consideration/intention amongst already interested audiences.

Recommendation

Focus on increasing effective exposure beyond low levels, while monitoring frequency to avoid reinforcing interest at early stages. At the same time, further creative testing can be used to better understand which elements of the campaign (e.g. imagery, framing, or messaging) may influence responses. This includes exploring whether certain elements may unintentionally increase appeal, particularly among high-interest audiences, and assessing how these effects vary across segments and exposure levels.

3

Why Awareness Is Not Converting Into Attitude Shift

Strategic Reflection

The campaign primarily aimed to communicate the difficulties of keeping focus pets. However, due to factors such as biases arising from differing levels of interest in the focus pets and a perceived lack of specificity in the creative, the campaign did not consistently lead to a reduction in ownership intent—particularly depending on the strength of prior interest and frequency of exposure. On the other hand, emotional messages—such as the idea (e.g., concerns about being unable to make the animals happy) were conveyed to serve as a more effective trigger for reconsidering pet ownership itself.

What this unlocks

- Regardless of campaign exposure, there is a general perception that “keeping focus pets is difficult”. (*Slide 35, Slide 53, Slide 63*).
- Messaging was likely to be filtered through pre-existing motivation; high-interest audiences may reinterpret campaign content through a positive or ownership-oriented lens (e.g., as pet-keeping information), whereas low-neutral-interest and low-interest audiences may be more likely to accept messaging as intended. (*Slide 39 Slide 47, Slide 51*)

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3

Why Awareness Is Not Converting Into Attitude Shift

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- This pre-existing interest effect is most pronounced among high-interest segments, where underlying motivations more strongly shape message interpretation and make attitudes harder to shift. Messaging therefore needs to be specific, detailed, and strong enough to counteract this bias. *(Slide 72)*
- The emotional message (e.g., concerns about being unable to make the animals happy) appears to function as a psychological deterrent, indicating that emotional appeals, rather than factual difficulty alone, can be effective in prompting reconsideration. *(Slide 64)*
- There is a clear gap between stated ownership consideration/intention and actual behavior, suggesting that consideration or intention alone do not necessarily translate into action. *(Slide 18, Slide 19)*

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3

Why Awareness Is Not Converting Into Attitude Shift

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Recommendation

To effectively shift attitudes, especially among high-interest audiences, more concrete and specific information is needed to better convey the realities and challenges of owning focus pets. However, information alone is unlikely to drive change. Emotional appeals, such as concerns about animal welfare, alongside social norm cues and other behavioural approaches, are also likely to play an important role.

Short-form, one-way video limits depth of understanding, so more interactive or engaging formats could help improve message processing. Going forward, creative testing across segments and exposure levels is needed to understand how different elements work together, and to identify the most effective balance of content, format, and delivery.

3. Survey Results and Analysis

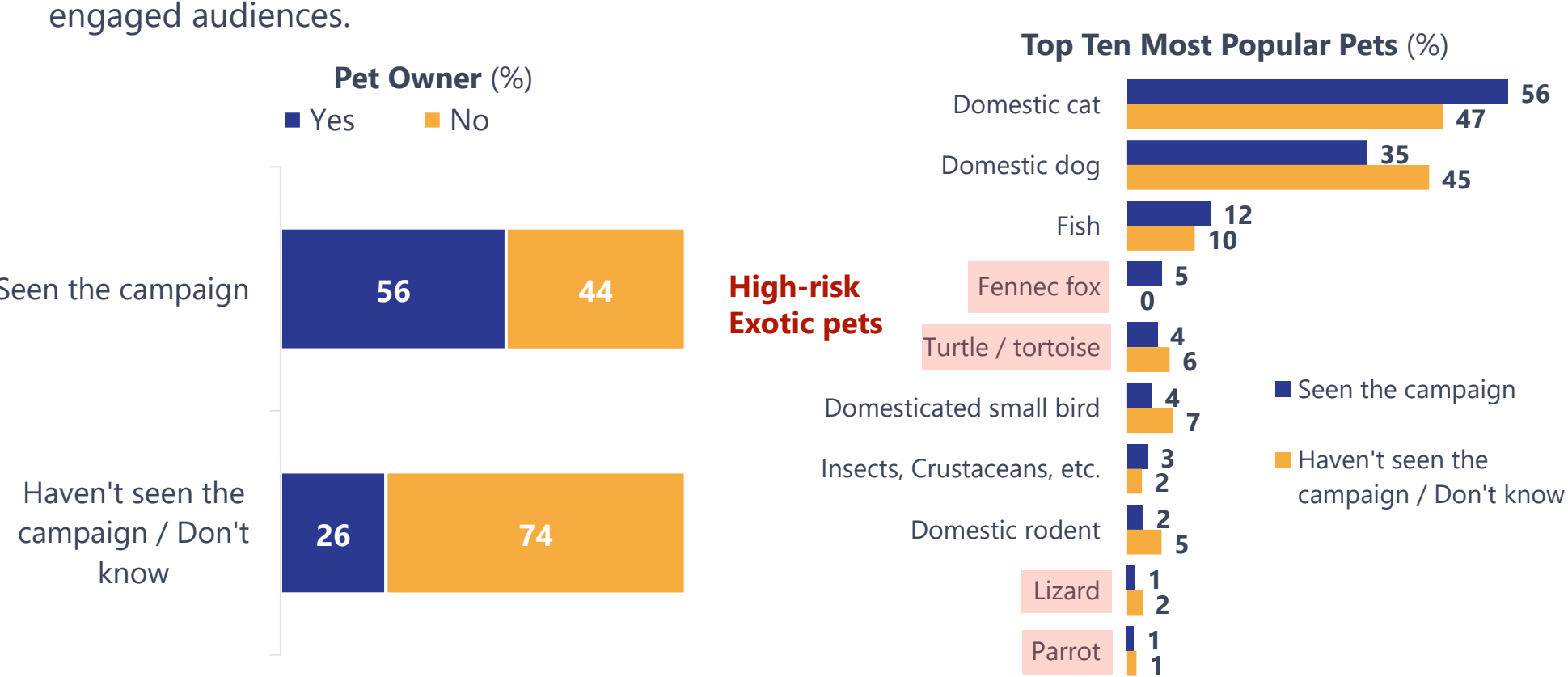


3.1 Pet Ownership and Focus Pet Interest



Pets Owned

Those who have recalled seeing the campaign are significantly more likely to own pets than those who do not. Domestic cats and dogs are the most commonly owned pets across both groups. Ownership of high-risk exotic pets remains low overall across both groups. This pattern is consistent with the campaign being more likely to be noticed by pet owners and animal-engaged audiences.



Other exotic pet ownership – total sample	
• Toad/frog	<1%
• Exotic rodent	<1%
• Newt/salamander	<1%
• Primate	<1%
• Exotic feline	<1%
• Ferret	<1%
• Snake	<1%
• Bird of prey	<1%
• Other non-domestic bird	<0.5%
• Sugar glider	<0.5%
• Hedgehog	<0.5%
• Other reptile	<0.5%
• Other exotic mammal	<0.5%
• Otter	0%
• Meerkat	0%
• Other exotic animal	0%

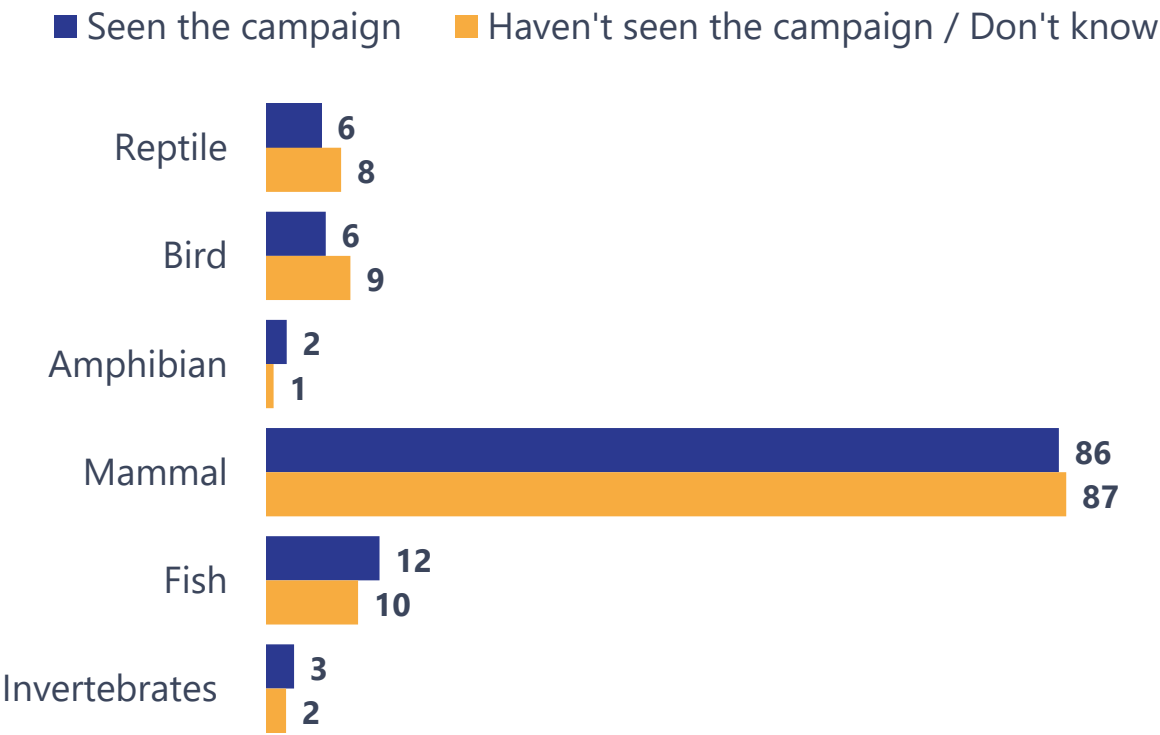
S1. Do you own any pets? Base: Total unweighted sample, n=1,821; Seen the campaign, n=749; Haven't seen the campaign / Don't know, n=1,072

S2. What kind of pets do you own? Please select all that apply. Base: Those who have pets, n=706; Seen the campaign, n=424; Haven't seen the campaign / Don't know, n=282

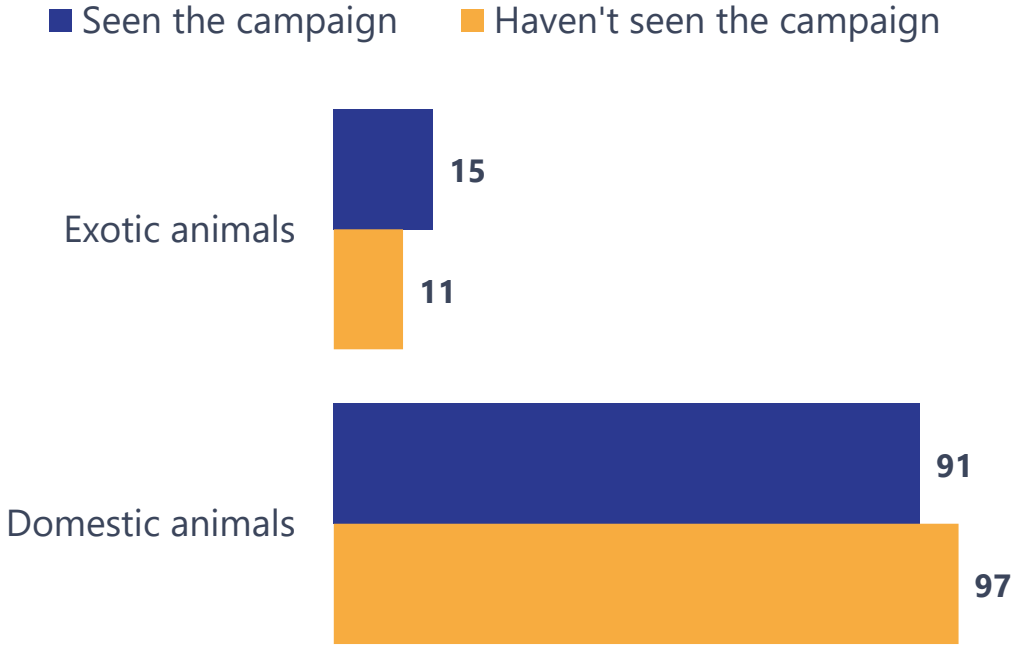
Category and Type of Pets Owned

The categories and types of pets owned are broadly similar among those who recall seeing the campaign and those who do not, with no statistically significant differences observed. While ownership of exotic animals is slightly higher among participants who recall seeing the campaign, this difference is not statistically significant.

Category of Pets Owned (%)



Type of Pets Owned (%)



19 S2. What kind of pets do you own? Please select all that apply. Base: Those who have pets, n=706; Seen the campaign, n=424; Haven't seen the campaign / Don't know, n=282

High-risk Exotic Pet Ownership Among Pet Owners - By Demographics

Current high-risk exotic pet (exotic pet) ownership varies across demographic groups. Ownership is lowest among participants aged under 24 and among those with a lower income, and is more common among those with a higher income. Regionally, ownership is uneven, with higher rates reported in Chugoku and Hokkaido, and particularly low ownership in Shikoku, highlighting substantial geographic variation in existing exotic pet ownership.

Gender

	% Own Exotic Pet
Male (n=386)	13%
Female (n=320)	15%
Total pet owners (n=694)	14%

Age

	% Own Exotic Pet
18-24 (n=61)	10%
25-44 (n=328)	17%
45-64 (n=208)	11%
65-79 (n=103)	12%
80+ (n=6)	N/A small sample size
Total pet owners (n=694)	14%

Education

	% Own Exotic Pet
Low (n=78)	28%
Medium (n=489)	12%
High (n=185)	16%
Total pet owners (n=694)	14%

Income

	% Own Exotic Pet
Low (n=171)	9%
Medium (n=304)	11%
High (n= 194)	23%
Prefer not to say (n=37)	14%
Total pet owners (n=694)	14%

Location

	% Own Exotic Pet
Hokkaido (n=66)	21%
Tohoku (n=63)	18%
Kanto (n=197)	12%
Chubu (n=109)	15%
Kansai (n=110)	13%
Chugoku (n=46)	23%
Shikoku (n=46)	1%
Kyushu & Okinawa (n=65)	12%
Total pet owners (n=694)	14%

S2. What kind of pets do you own? Please select all that apply.

High-risk exotic Pet Ownership Among Pet Owners - By Exposure and Interest

Across groups, there is a non-statistically significant pattern in which participants who recalled the campaign are more likely to own exotic pets than those who did not recall the campaign. The only statistically significant difference is between high-interest participants (i.e. those who say they would enjoy interacting with focus pets) who recalled the campaign and low or neutral-interest participants who did not recall the campaign.

Exposure

	% Own Exotic Pet
Exposed (n=413)	15%
Not exposed (n=281)	11%
Total pet owners (n=694)	14%

Note: As only pet owners are asked this question, a breakdown of ownership is not relevant.

Exposure vs Interest

	% Own Exotic Pet
High interest, exposed (n=377)	16%
High interest, not exposed (n=187)	12%
Low neutral interest, exposed (n=47)	11%
Low neutral interest, not exposed (n=95)	9%
Low interest, exposed (n=34)	15%
Low interest, not exposed (n=67)	13%
Total pet owners (n=694)	14%

Note: See slide 6 for grouping classifications

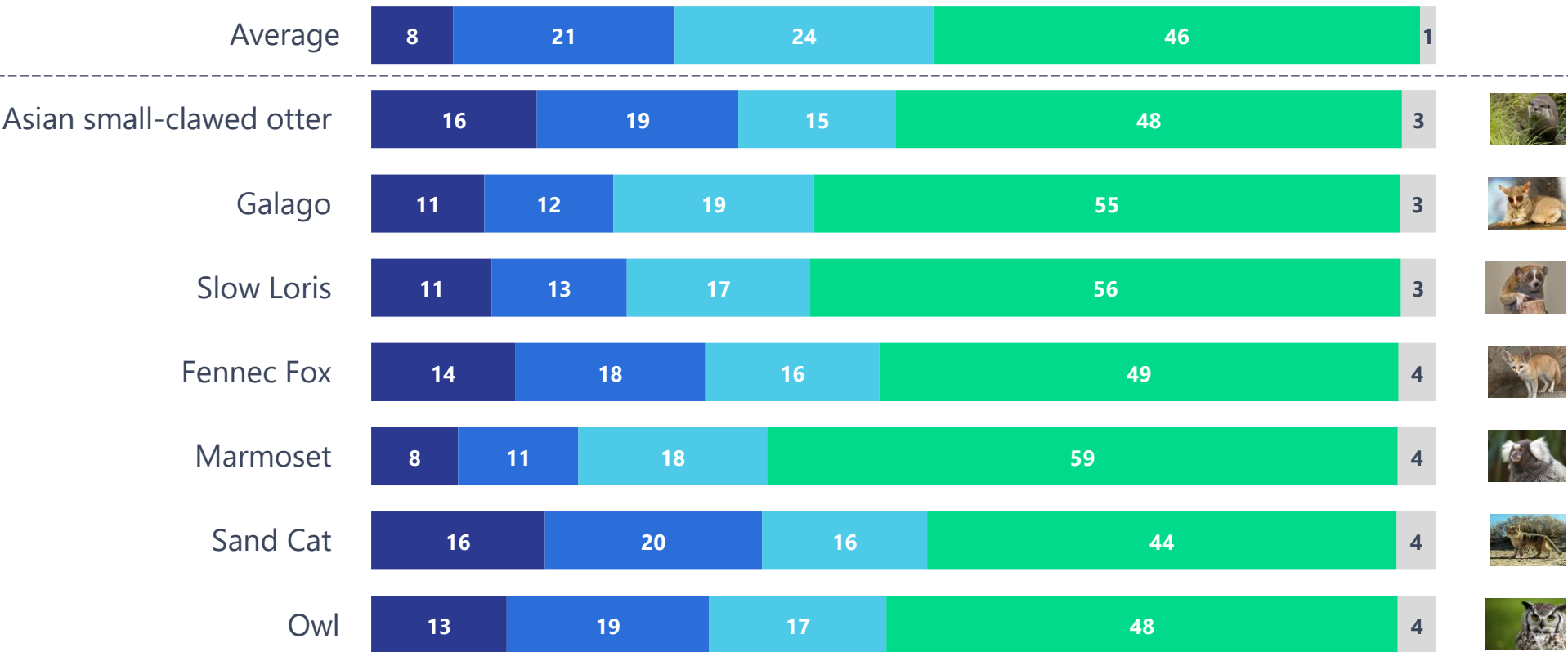
S2. What kind of pets do you own? Please select all that apply.

Consideration of Owning Focus Pets in the Future

Seven high-risk exotic pets were chosen as the focus of this study (focus pets). When shown a photo of a focus pet, nearly three in ten say they would consider owning one, while 70% say they would not consider it. Willingness is highest for sand cats (37%) and lowest for marmosets (19%).

Consideration to Own Focus Pets (%)

■ Yes, certainly ■ Yes, maybe ■ No, probably not ■ No, certainly not ■ I don't know/ indifferent



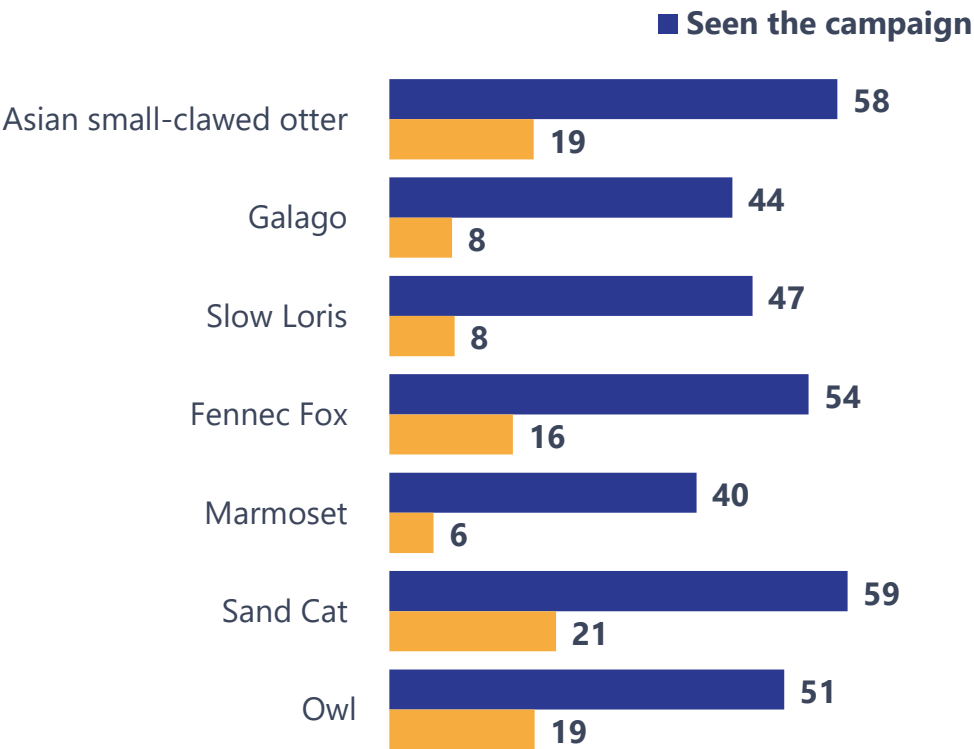
22 S4. Whether or not you already own one, would you consider owning any of these focus pets in the foreseeable future?
Base: Total unweighted sample, n=1,821

Consideration of Owning Focus Pets in the Future – By Campaign Awareness

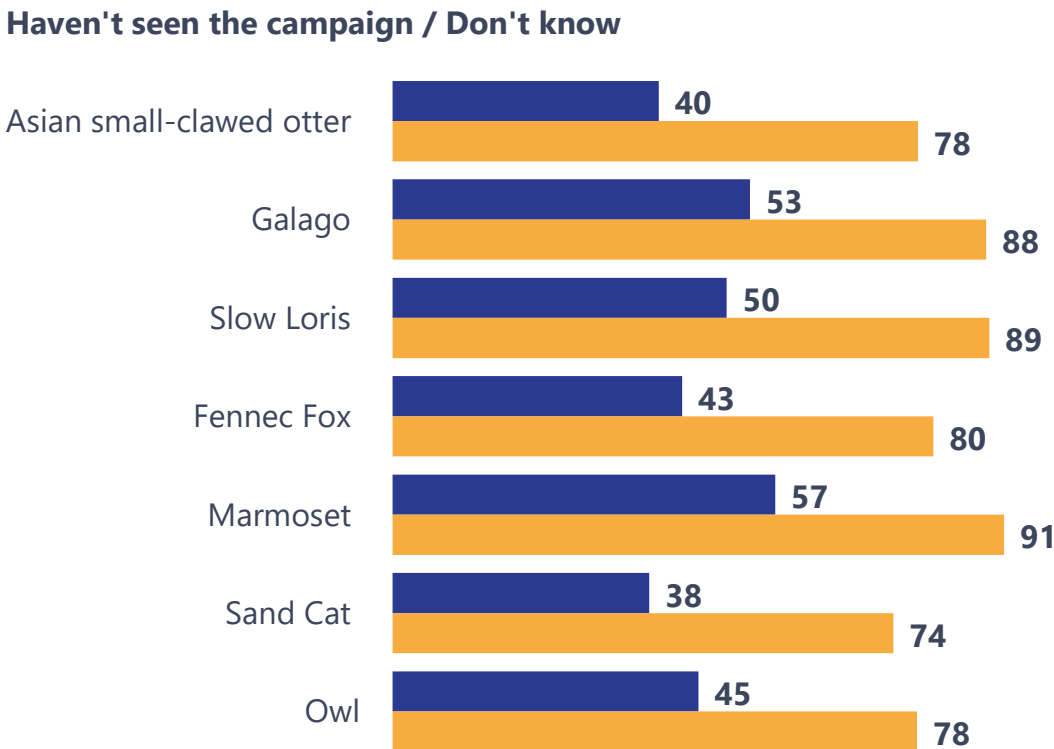
Those who recall seeing the campaign are significantly more likely to express some willingness to own a focus pet and significantly less likely to reject ownership outright, across all species. This pattern may reflect pre-existing interest among those more likely to notice or recall the campaign.

Consideration of Owning Focus Pets

“Yes, certainly” and “Yes, maybe” (%)

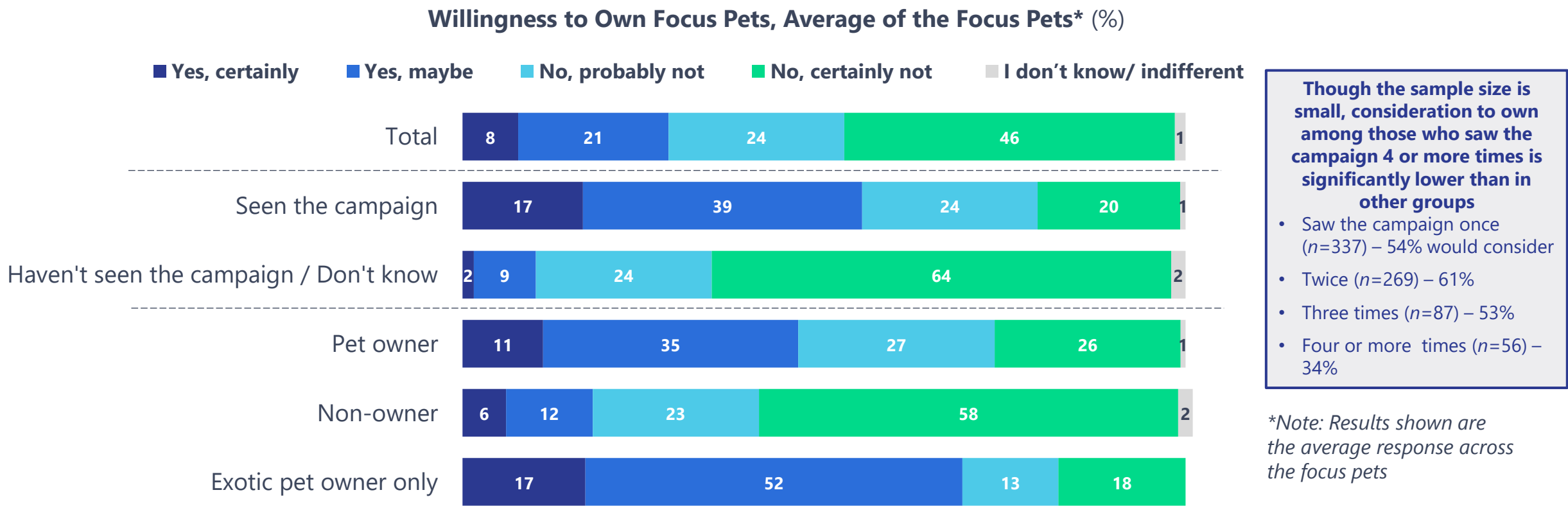


“No, Certainly not” and “No, probably not” (%)



Consideration of Owning Focus Pets in the Future – By Sub-group

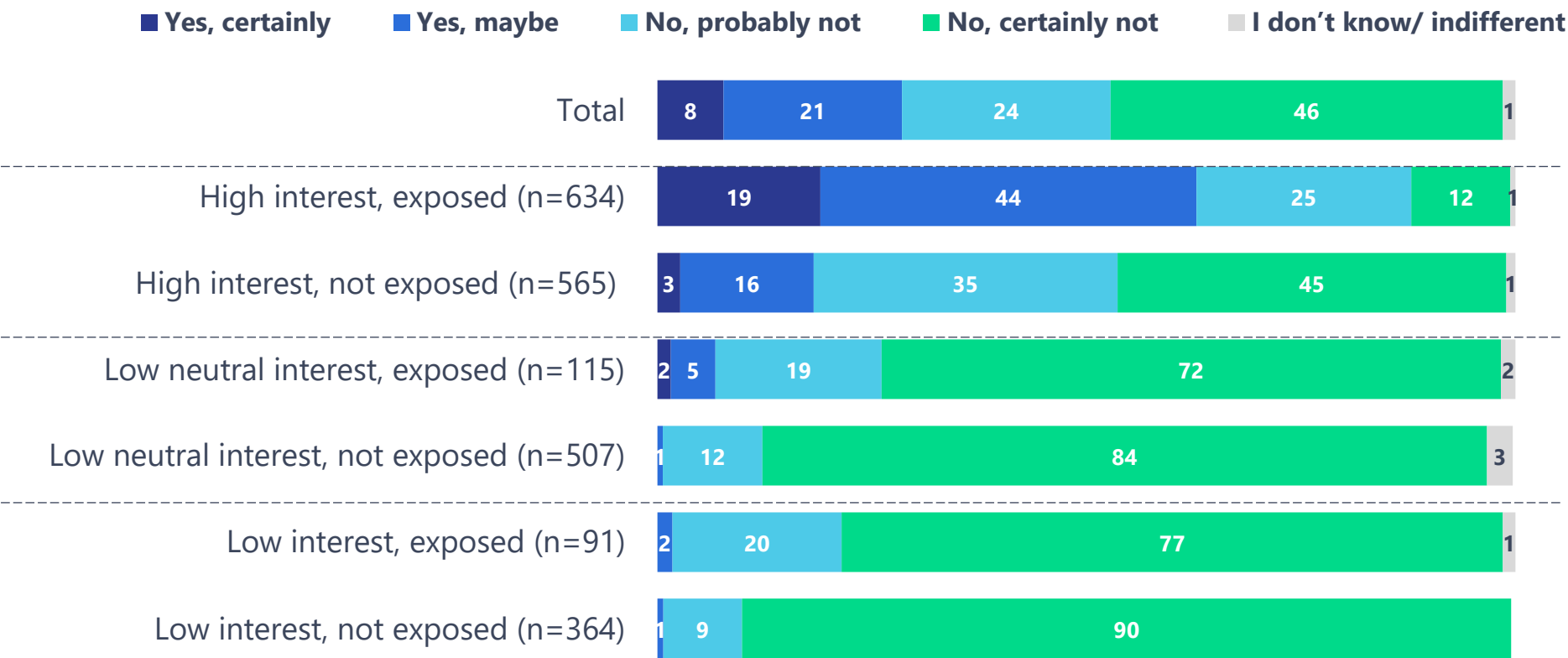
Participants who recalled the campaign show higher consideration to own focus pets, though this likely reflects pre-existing differences in interest and engagement. Notably, higher exposure levels (e.g., four or more times) are associated with significantly lower ownership consideration.



S4. Whether or not you already own one, would you consider owning any of these focus pets in the foreseeable future?
Base: Total unweighted sample, n=1,821; Seen the campaign, n=749; Haven't seen the campaign / Don't know, n=1,072;
Pet owner, n=706; Domestic pet owner only, n=599; Focus pet owner only, n=46

Consideration of Owning Focus Pets in the Future – By Interest and Exposure

Willingness to Own Focus Pets, Average of the Focus Pets* (%)



Though based on a small sample size, high-interest participants who recall seeing the campaign four or more times are significantly more likely to say they would not consider owning a focus pet than those who recall seeing it one or two times.

- Saw the campaign once (n=275) – 36% would probably or certainly not consider owning a focus pet
- Twice (n=243) – 32%
- Three times (n=74) – 43%
- Four or more times (n=42) – 54%

*Note: Results shown are the average response across the focus pets

Consideration of Owning Focus Pets in the Future - By Demographics

Participants aged 18-44 show a significantly higher average consideration to own focus pets across species than those aged 45 and over, as do participants with lower levels of education. Consideration is also significantly higher among high-income participants compared with other income groups. Despite low levels of current exotic pet ownership, participants in Shikoku show significantly higher average consideration of owning focus pets than those in most other regions, second only to Hokkaido.

Gender

	% Would Consider
Male (n=886)	30%
Female (n=935)	27%
Total (n=1,821)	29%

Age

	% Would Consider
18-24 (n=178)	38%
25-44 (n=626)	41%
45-64 (n=514)	14%
65-79 (n=485)	23%
80+ (n=18)	N/A small sample size
Total (n=1,821)	29%

Education

	% Would Consider
Low (n=72)	47%
Medium (n=1,053)	31%
High (n=696)	18%
Total (n=1,821)	29%

Income

	% Would Consider
Low (n=657)	14%
Medium (n=649)	40%
High (n=330)	48%
Prefer not to say (n=185)	11%
Total (n=1,821)	29%

Location

	% Would Consider
Hokkaido (n=110)	56%
Tohoku (n=121)	32%
Kanto (n=581)	25%
Chubu (n=288)	23%
Kansai (n=294)	19%
Chugoku (n=139)	30%
Shikoku (n=71)	49%
Kyushu & Okinawa (n=217)	34%
Total (n=1,821)	29%

26 S4. Whether or not you already own one, would you consider owning any of these focus pets in the foreseeable future?
Base: Total unweighted sample, n=1,821
Note: Results shown are the average response across the focus pets

Consideration of Owning Focus Pets in the Future - By Ownership, Exposure, and Interest (1/2)

Participants who recalled the campaign are significantly more likely to consider owning focus pets than those who did not recall it, across both pet owners and non-owners. This difference is most pronounced among high-interest participants (i.e. those who say they would enjoy interacting with focus pets), who show substantially higher levels of consideration when they recall the campaign compared with those who do not. Among participants with lower levels of interest, consideration remains low regardless of campaign recall.

Ownership vs Exposure

	% Would Consider
Owner, exposed (n=424)	66%
Owner, not exposed (n=282)	17%
Non-owner, exposed (n=325)	41%
Non-owner, not exposed (n=790)	8%
Total (n=1,821)	29%

Interest vs Exposure

	% Would Consider
High interest, exposed (n=634)	63%
High interest, not exposed (n=565)	18%
Low neutral interest, exposed (n=115)	7%
Low neutral interest, not exposed (n=507)	1%
Low interest, exposed (n=91)	2%
Low interest, not exposed (n=364)	1%
Total (n=1,821)	29%

Note: See slide 6 for grouping classifications

Consideration of Owning Focus Pets in the Future - By Ownership, Exposure, and Interest (2/2)

Among both pet owners and non-owners, consideration of owning focus pets is highest among high-interest participants who recalled the campaign, and substantially lower among those who did not recall it. Across groups, levels of consideration are closely aligned with expressed interest in interacting with focus pets, with similar patterns observed among both owners and non-owners.

Ownership vs Exposure vs Interest

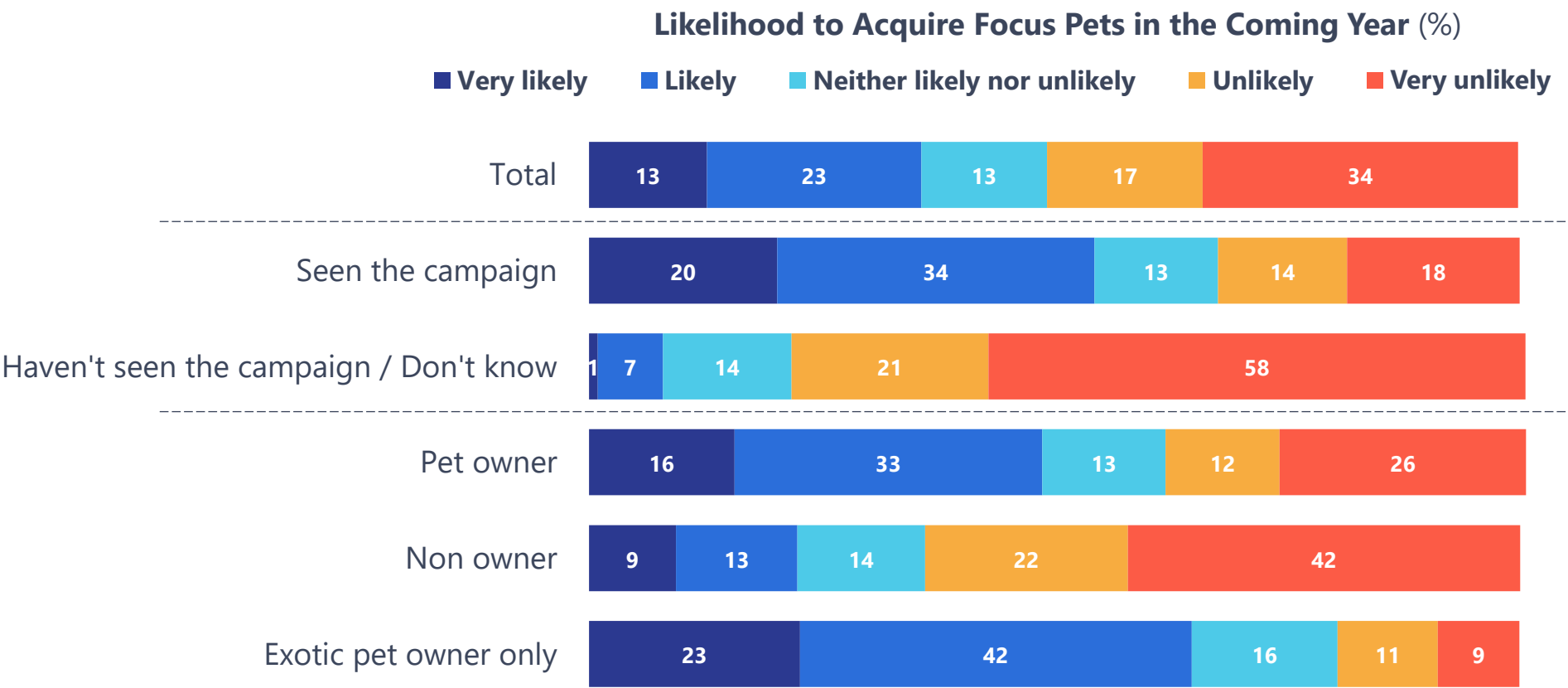
Owners	% Would Consider
Owner, high interest, exposed (n=377)	72%
Owner, high interest, not exposed (n=187)	25%
Owner, low neutral interest, exposed (n=47)	10%
Owner, low neutral interest, not exposed (n=95)	2%
Owner, low interest, exposed (n=34)	5%
Owner, low interest, not exposed (n=67)	1%
Total (n=1,821)	29%

Non-owners	% Would Consider
Non-owner, high interest, exposed (n=257)	50%
Non-owner, high interest, not exposed (n=378)	15%
Non-owner, low neutral interest, exposed (n=68)	5%
Non-owner, low neutral interest, not exposed (n=412)	1%
Non-owner, low interest, exposed (n=57)	0%
Non-owner, low interest, not exposed (n=297)	1%
Total (n=1,821)	29%

Note: See slide 6 for grouping classifications

Likelihood to Buy/get Focus Pets in the Next 12 Months

Participants who recalled the campaign are more likely to say they would be likely to acquire a focus pet in the next 12 months than those who did not recall it, as are pet owners, and specifically exotic pet owners.



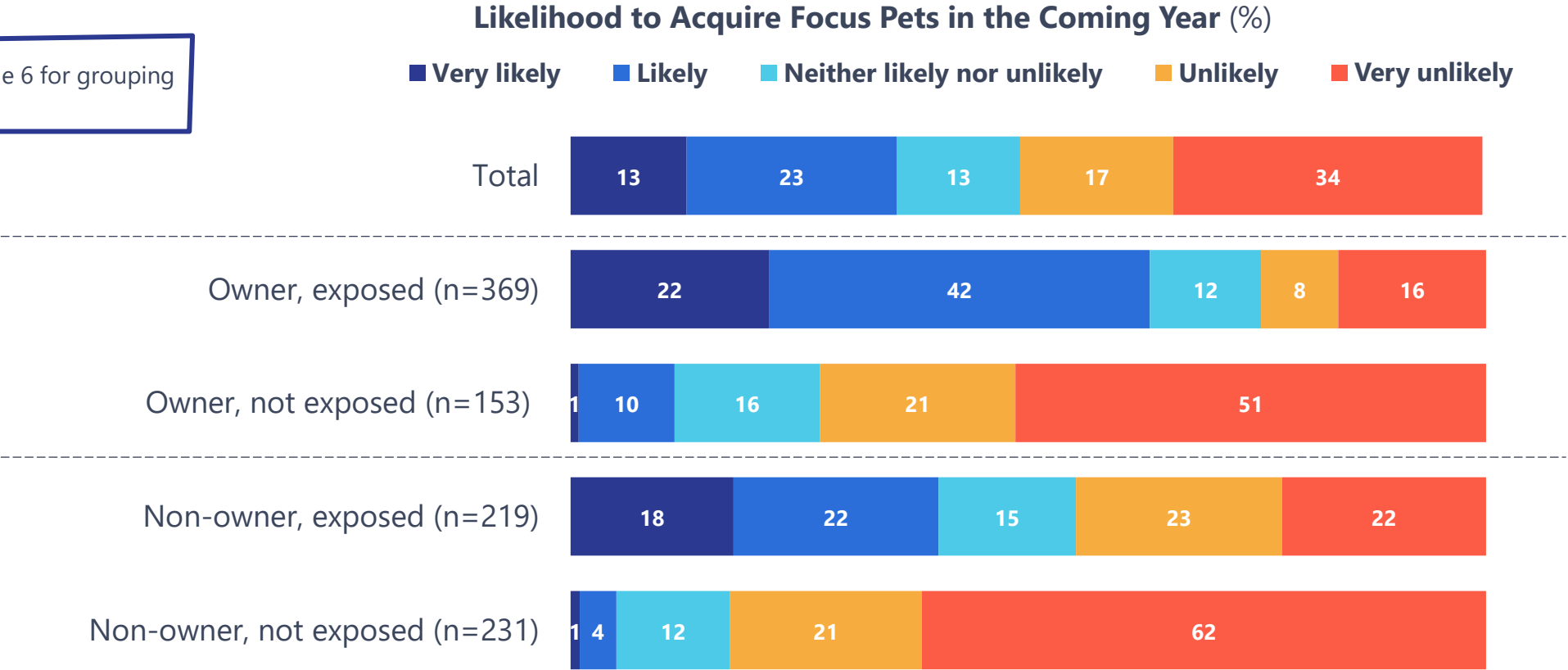
Likelihood varies across reported levels of campaign recall. Higher likelihood is observed among those who recall the campaign one to three times; a significantly lower likelihood is observed among those who recall the campaign four or more times, compared with those who recall the campaign twice or three times. However, the group recalling the campaign four or more times has a relatively small sample size, so this pattern should be interpreted with caution

- Saw the campaign once (n=247) – 49% likely
- Twice (n=233) – 59%
- Three times (n=71) – 66%
- Four or more times (n=37) – 34%

Likelihood to Buy/get Focus Pets in the Next 12 Months – By Ownership and Exposure

Those who recalled the campaign are more likely to report that they would be likely to buy/get a focus pet in the next 12 months than those who did not recall it. This pattern is observed across both pet owners and non-owners, with higher reported likelihood among those recalling the campaign.

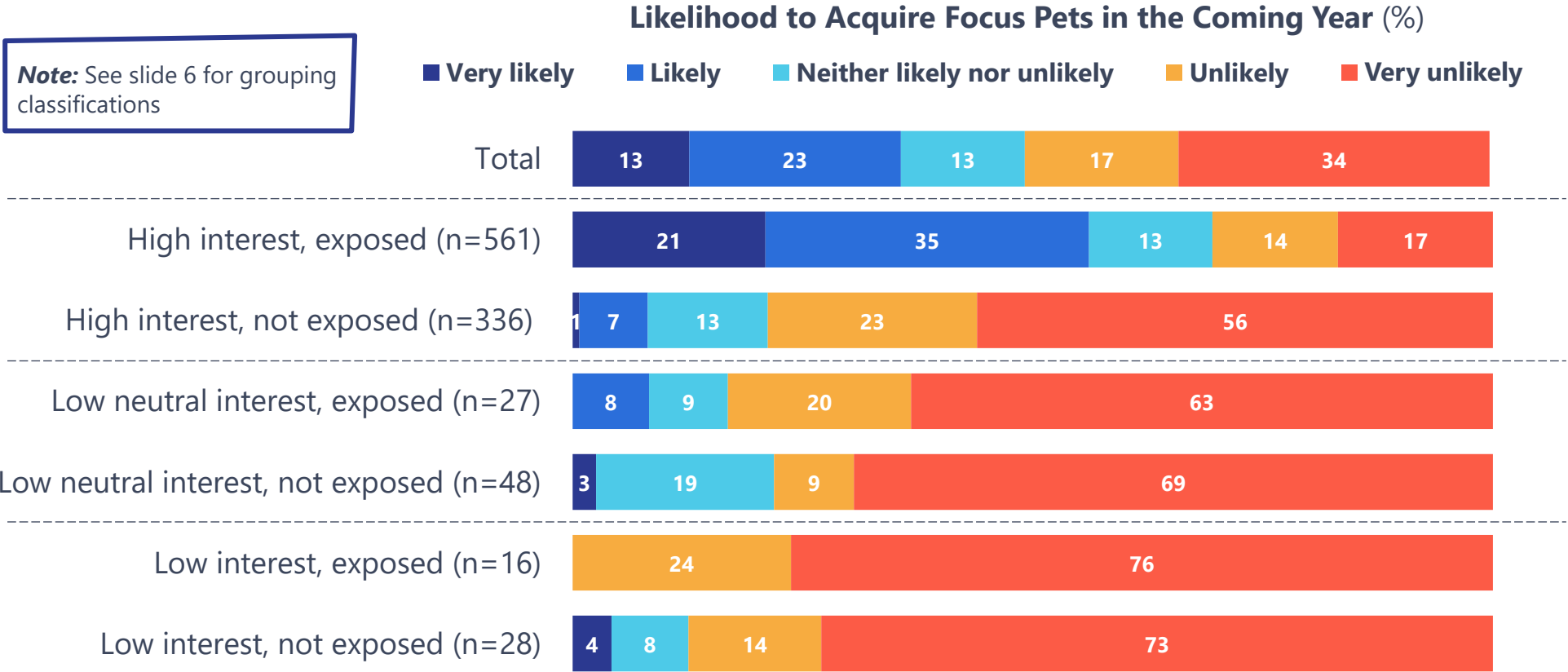
Note: See slide 6 for grouping classifications



Likelihood to Buy/get Focus Pets in the Next 12 Months – By Interest and Exposure

Among participants considering ownership, those with a high interest in interacting with focus pets who recalled the campaign are more likely to report being likely to buy/get a focus pet than those who did not recall it.

Note: See slide 6 for grouping classifications



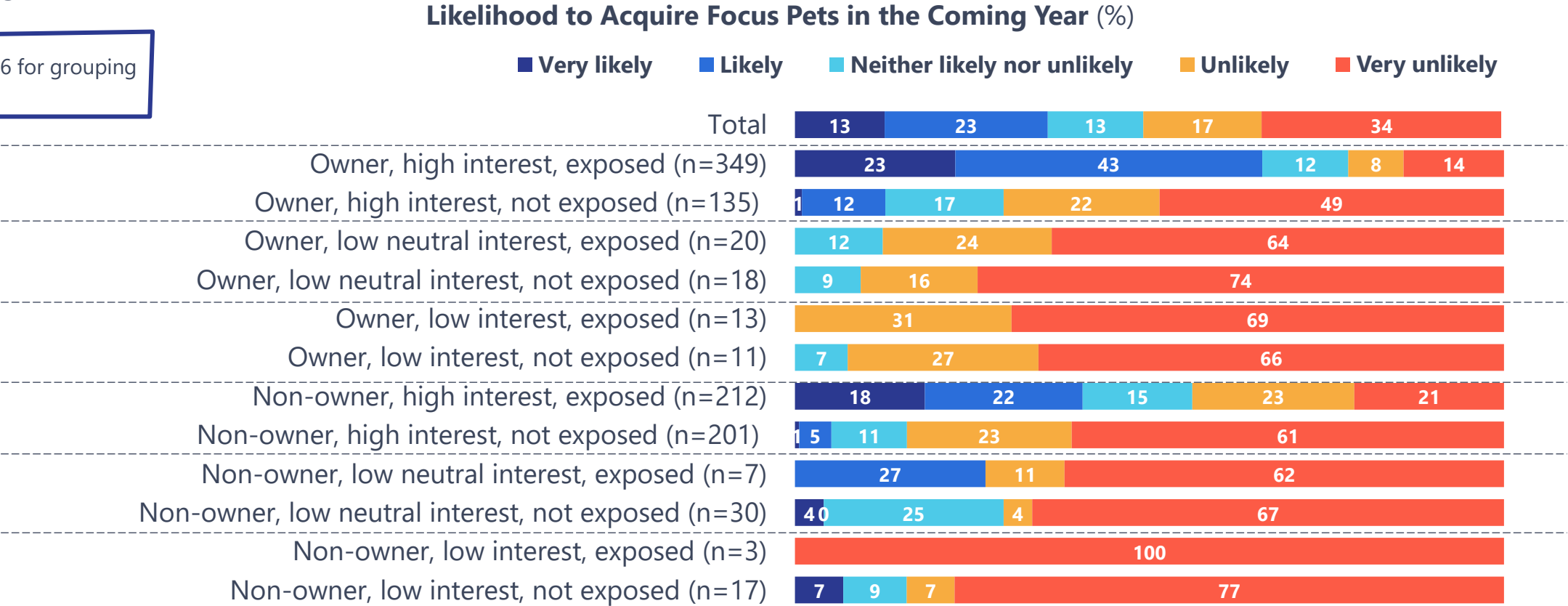
Though based on a small sample size, high-interest participants who recall seeing the campaign four or more times are significantly more likely to say they are unlikely to buy/get a focus animal in the next 12 months than those who recall seeing it two or three times.

- Saw the campaign once (n=234) – 37% are somewhat or very unlikely to buy/get focus animals in the next 12 months
- Twice (n=229) – 23%
- Three times (n=67) – 24%
- Four or more times (n=31) – 55%

Likelihood to Buy/get Focus Pets in the Next 12 Months – By Ownership, Interest, and Exposure

Among participants considering ownership, those with a high interest in interacting with focus pets who recalled the campaign are more likely to report being likely to buy/get a focus pet than those who did not recall it. Across groups, likelihood remains closely aligned with expressed interest, with consistently lower levels among participants with low or neutral interest regardless of campaign recall.

Note: See slide 6 for grouping classifications

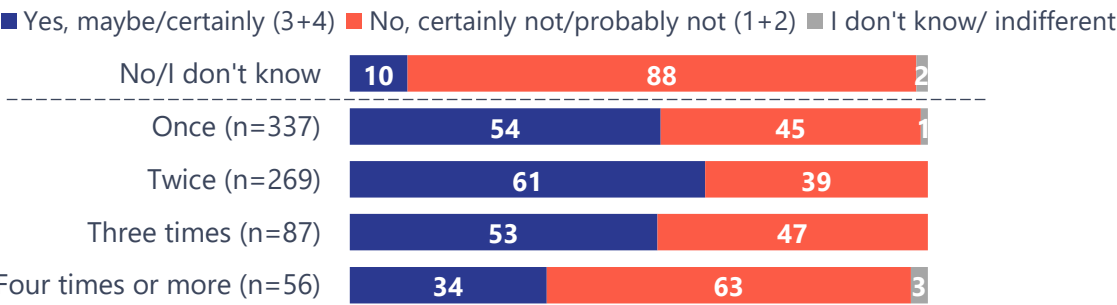


Relationship Between Exposure Frequency and Intention/Attitudes

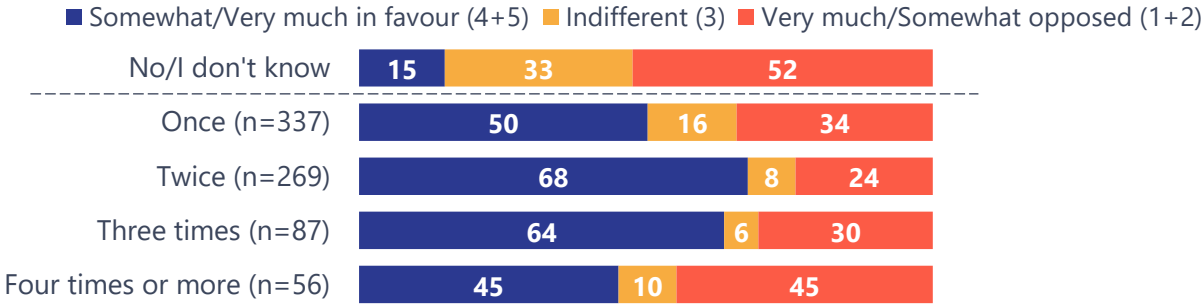
**Note: Results shown are the average response across the focus pets*

Participants who recall the campaign generally show higher ownership intention and more positive perceptions of ownership; however, higher exposure (e.g., four or more times) may be associated with lower reported intention and more negative attitudes toward ownership.

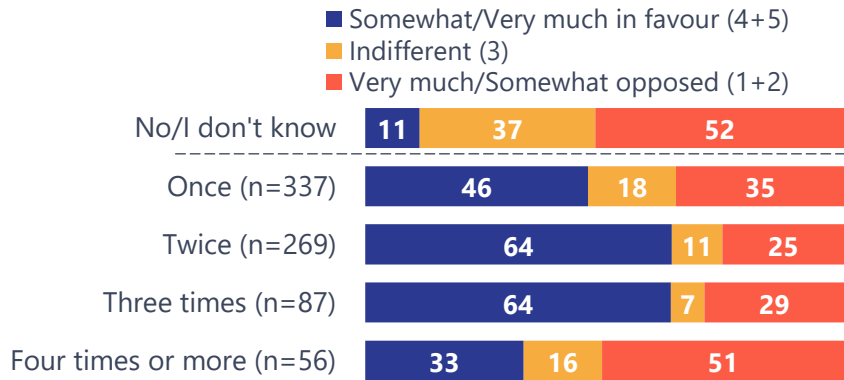
Willingness to Own Focus Pets, Average of the Focus Pets* (%)



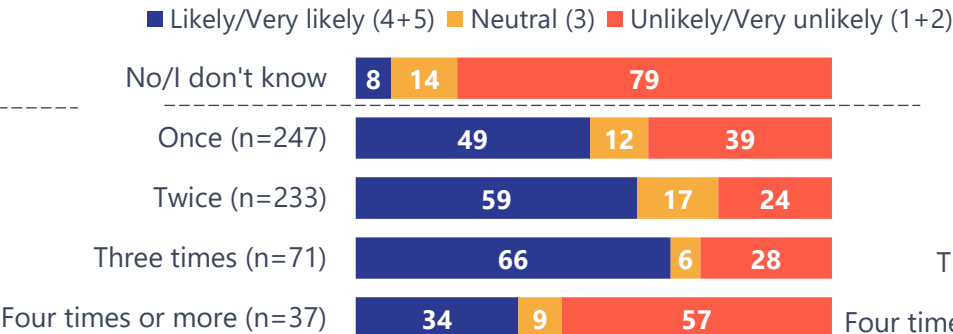
Perceived Attitudes Toward Owning Focus Pets (%)



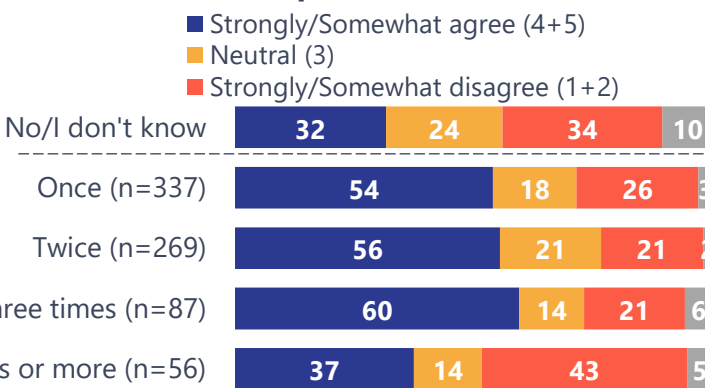
Perceived Attitudes Toward Owning Focus Pets from Social Circles (%)



Likelihood to Acquire Focus Pets in the Coming Year (%)



Agreement that Pets Are Happier Living with People than in the Wild (%)



S4. Whether or not you already own one, would you consider owning any of these focus pets in the foreseeable future? Base: n=1,821; Q3.2 What is your attitude towards owning focus pets? Base: n=1,821; Q3.3 What do you feel the attitude towards owning focus pets would be from your friends, family, and community (including SNS)? Base: n=1,821; Q3.4 You said you would like to own [species selected in S4]. How likely are you to buy/get any of these animals in the next 12 months? Base: Those who would consider owning focus pets, n=972; Q3.5.9 Please indicate how much you agree/disagree with these statements - The focus pets are much happier living with people than in the wild. Base: n=1,821

3.2 Drivers and Deterrents of Focus Pet Purchase



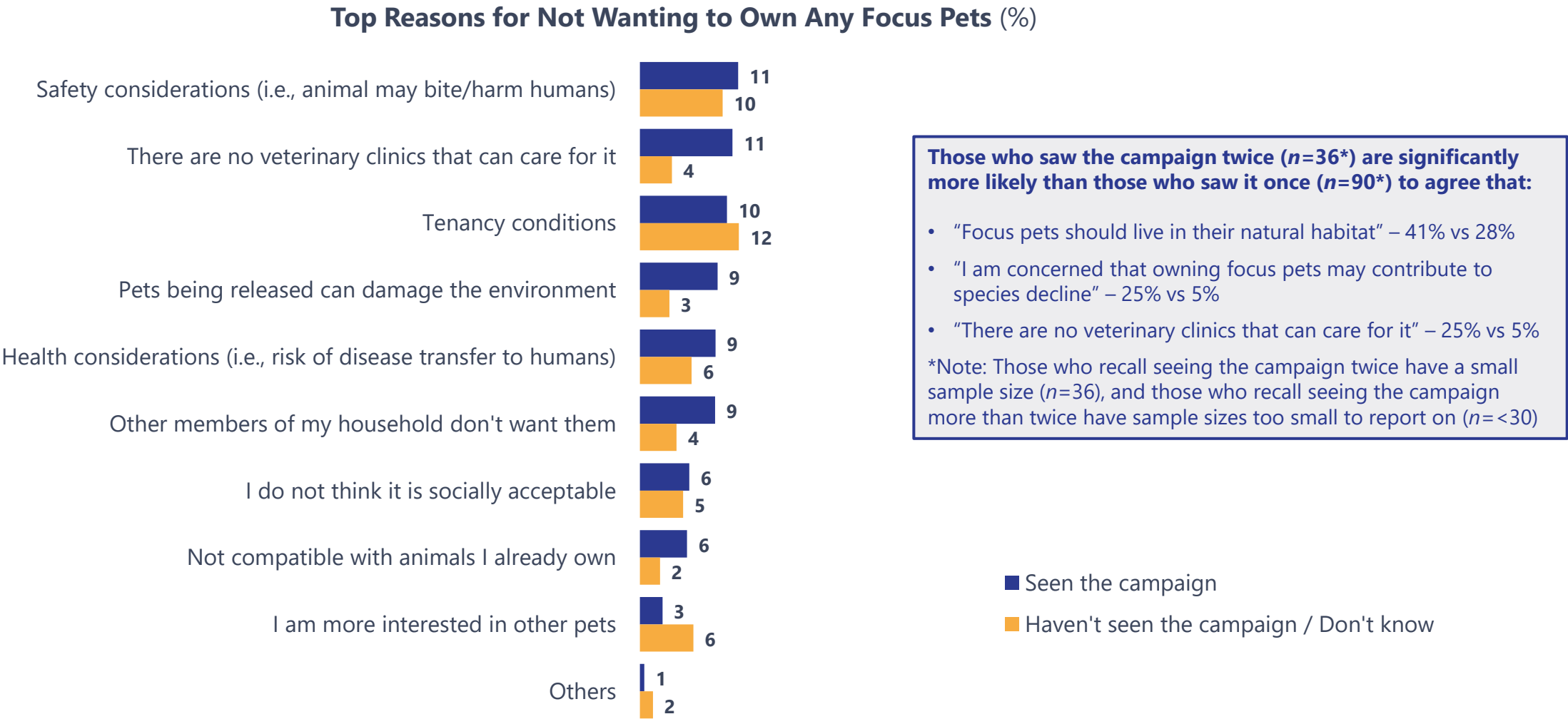
Deterrents of Focus Pet Purchase (1/2)

Participants who recall seeing the campaign are more likely to cite ethical concerns, including beliefs that focus pets should live in their natural habitat, concerns about species decline, and environmental damage from released pets (see next slide), compared with those who do not recall seeing the campaign. While both groups point to practical barriers, participants who do not recall seeing the campaign are more likely to cite housekeeping demands or say they do not want a pet at all.

Top Reasons for Not Wanting to Own Any Focus Pets (%)



Deterrents of Focus Pet Purchase (2/2)



36 Q3.1 You said that you would not like to own any of the focus pets. Why not? Please rank up to three answers. Base: Those who don't want to own any of the focus pets, n=849; Seen the campaign, n=161; Haven't seen the campaign / Don't know, n=688

Deterrents of Focus Pet Purchase - By Ownership and Exposure (1/2)

Across participants who do not want to own focus pets, practical considerations such as care requirements and costs are cited consistently across groups. However, participants who recalled the campaign are more likely to mention certain ethical and conservation-related reasons, including that focus pets should live in their natural habitat and owning them may contribute to species decline. Owners who have not been exposed are significantly more likely than any other group to say there is not enough information on how to care for the animal

Top Reasons for Not Wanting to Own Any Focus Pets (%)

	Total (n=849)	Owner, exposed (n=55)	Owner, not exposed (n=129)	Non-owner, exposed (n=106)	Non-owner, not exposed (n=559)
Requires a lot of housekeeping	35%	25%	27%	29%	38%
I do not want any pets	32%	2%	8%	19%	42%
Not enough information on animal care	25%	23%	42%	23%	21%
Feeding requirements are a challenge	21%	28%	21%	17%	22%
Focus pets should live in their natural habitat	20%	33%	23%	33%	16%
Space considerations	16%	9%	14%	15%	18%
Limits my mobility/travel	15%	9%	13%	13%	16%
Too expensive	14%	19%	16%	14%	13%
Tenancy conditions	11%	2%	5%	14%	13%
Safety considerations	10%	11%	16%	12%	8%

Note: See slide 6 for grouping classifications

Table continued on next slide

Deterrents of Focus Pet Purchase - By Ownership and Exposure (2/2)

For those who do not want focus pets, pet owners who recalled the campaign are significantly more likely than any other group to have concerns about the legality

Top Reasons for Not Wanting to Own Any Focus Pets (%)

	Total (n=849)	Owner, exposed (n=55)	Owner, not exposed (n=129)	Non-owner, exposed (n=106)	Non-owner, not exposed (n=559)
Legality considerations	7%	24%	10%	9%	4%
Health considerations	7%	5%	2%	11%	7%
I am more interested in other pets	6%	1%	14%	3%	4%
I do not think it is socially acceptable	5%	6%	6%	6%	5%
Other household members don't want them	5%	9%	2%	9%	5%
No veterinary clinics that can care for it	5%	17%	6%	8%	3%
May contribute to species decline	5%	15%	4%	12%	3%
Released pets can damage the environment	4%	13%	7%	7%	3%
Not compatible with animals I already own	3%	13%	11%	2%	0%
Other	1%	0%	2%	1%	1%

Note: See slide 6 for grouping classifications

Deterrents of Focus Pet Purchase - By Interest and Exposure (1/2)

Across interest groups, reasons for not wanting to own focus pets are broadly similar, with practical barriers cited consistently. However, among participants with low or neutral interest who recalled the campaign, there is a greater tendency to cite ethical considerations, particularly that focus pets should live in their natural habitat, as well as concerns related to legality. This pattern may reflect differences in familiarity or engagement with the topic, as well as a greater tendency among these groups to be more receptive to campaign information.

Top Reasons for Not Wanting to Own Any Focus Pets (%)

	Total (n=849)	High interest, exposed (n=73)	High interest, not exposed (n=229)	Low neutral interest, exposed (n=88)	Low neutral interest not exposed (n=459)	Low interest exposed (n=75)	Low interest not exposed (n=336)
Requires a lot of housekeeping	35%	39%	40%	18%	34%	19%	37%
I do not want any pets	32%	14%	25%	13%	41%	14%	42%
Not enough information on animal care	25%	21%	31%	26%	22%	28%	22%
Feeding requirements are a challenge	21%	22%	23%	19%	21%	19%	21%
Focus pets should live in their natural habitat	20%	21%	20%	44%	16%	44%	17%
Space considerations	16%	15%	20%	11%	16%	11%	15%
Limits my mobility/travel	15%	12%	18%	11%	14%	11%	16%
Too expensive	14%	19%	17%	13%	11%	15%	9%
Tenancy conditions	11%	13%	16%	8%	9%	7%	9%
Safety considerations	10%	9%	10%	13%	10%	13%	11%

Note: See slide 6 for grouping classifications

Table continued on next slide



Deterrents of Focus Pet Purchase - By Interest and Exposure (2/2)

Top Reasons for Not Wanting to Own Any Focus Pets (%)

	Total (n=849)	High interest, exposed (n=73)	High interest, not exposed (n=229)	Low neutral interest, exposed (n=88)	Low neutral interest not exposed (n=459)	Low interest exposed (n=75)	Low interest not exposed (n=336)
Legality considerations	7%	12%	5%	16%	5%	15%	6%
Health considerations	7%	7%	5%	10%	7%	10%	8%
I am more interested in other pets	6%	3%	7%	2%	6%	0%	5%
I do not think it is socially acceptable	5%	6%	5%	6%	5%	4%	5%
Other household members don't want them	5%	9%	6%	8%	3%	9%	3%
No veterinary clinics that can care for it	5%	6%	4%	15%	3%	14%	3%
May contribute to species decline	5%	11%	4%	15%	3%	17%	2%
Released pets can damage the environment	4%	7%	5%	10%	3%	11%	4%
Not compatible with animals I already own	3%	10%	3%	2%	2%	1%	2%
Other	1%	1%	1%	0%	2%	0%	2%

Note: See slide 6 for grouping classifications

Deterrents of Focus Pet Purchase - By Interest and Exposure Among Owners (1a/2)

Among pet owners who do not want to own focus pets, responses are broadly consistent across groups, with practical considerations cited most frequently. Some variation is observed across interest and recall groups, but no clear pattern emerges across most factors.

Owners	Top Reasons for Not Wanting to Own Any Focus Pets (%)						
	Total (n=849)	High interest, exposed (n=28)	High interest, not exposed (n=52)	Low neutral interest, exposed (n=27)	Low neutral interest not exposed (n=77)	Low interest exposed (n=21)	Low interest not exposed (n=56)
Requires a lot of housekeeping	35%	34%	26%	15%	28%	10%	32%
I do not want any pets	32%	3%	6%	0%	9%	0%	13%
Not enough information on animal care	25%	23%	50%	24%	37%	30%	35%
Feeding requirements are a challenge	21%	32%	26%	23%	17%	20%	22%
Focus pets should live in their natural habitat	20%	21%	27%	48%	21%	48%	25%
Space considerations	16%	8%	20%	10%	10%	12%	5%
Limits my mobility/travel	15%	13%	17%	3%	10%	4%	10%
Too expensive	14%	33%	19%	4%	15%	5%	8%
Tenancy conditions	11%	5%	9%	0%	1%	0%	2%
Safety considerations	10%	4%	7%	18%	22%	23%	26%

Note: See slide 6 for grouping classifications

Table continued on next slide

Deterrents of Focus Pet Purchase - By Interest and Exposure Among Owners (2a/2)

Differences in perception appear among smaller sample groups and should be treated with caution

Owners		Top Reasons for Not Wanting to Own Any Focus Pets (%)					
	Total (n=849)	High interest, exposed (n=28)	High interest, not exposed (n=52)	Low neutral interest, exposed (n=27)	Low neutral interest not exposed (n=77)	Low interest exposed (n=21)	Low interest not exposed (n=56)
Legality considerations	7%	Sample size below n=30	9%	Sample size below n=30	10%	Sample size below n=30	11%
Health considerations	7%		3%		2%		3%
I am more interested in other pets	6%		14%		15%		15%
I do not think it is socially acceptable	5%		4%		8%		9%
Other household members don't want them	5%		2%		2%		1%
No veterinary clinics that can care for it	5%		6%		6%		7%
May contribute to species decline	5%		7%		2%		1%
Released pets can damage the environment	4%		14%		3%		4%
Not compatible with animals I already own	3%		13%		10%		11%
Other	1%		0%		4%		4%

Note: See slide 6 for grouping classifications

Table continued on next slide

Deterrents of Focus Pet Purchase - By Interest and Exposure Among Non-owners (1b/2)

Among non-owners who do not want to own focus pets, responses are consistent across interest and recall groups, with practical barriers and general lack of interest cited most frequently

Non-owners		Top Reasons for Not Wanting to Own Any Focus Pets (%)					
	Total (n=849)	High interest, exposed (n=45)	High interest, not exposed (n=177)	Low neutral interest, exposed (n=61)	Low neutral interest not exposed (n=382)	Low interest exposed (n=54)	Low interest not exposed (n=280)
Requires a lot of housekeeping	35%	42%	45%	19%	35%	22%	38%
I do not want any pets	32%	20%	30%	19%	47%	19%	48%
Not enough information on animal care	25%	19%	25%	26%	19%	27%	19%
Feeding requirements are a challenge	21%	16%	22%	18%	22%	19%	21%
Focus pets should live in their natural habitat	20%	21%	19%	43%	15%	42%	16%
Space considerations	16%	19%	20%	11%	17%	11%	17%
Limits my mobility/travel	15%	11%	19%	14%	15%	14%	17%
Too expensive	14%	10%	17%	17%	11%	19%	9%
Tenancy conditions	11%	18%	19%	11%	11%	10%	11%
Safety considerations	10%	12%	11%	11%	7%	10%	8%

Note: See slide 6 for grouping classifications

Table continued on next slide

Deterrents of Focus Pet Purchase - By Interest and Exposure Among Non-owners (2b/2)

Differences across interest and recall groups are generally limited, with no consistent pattern across most factors.

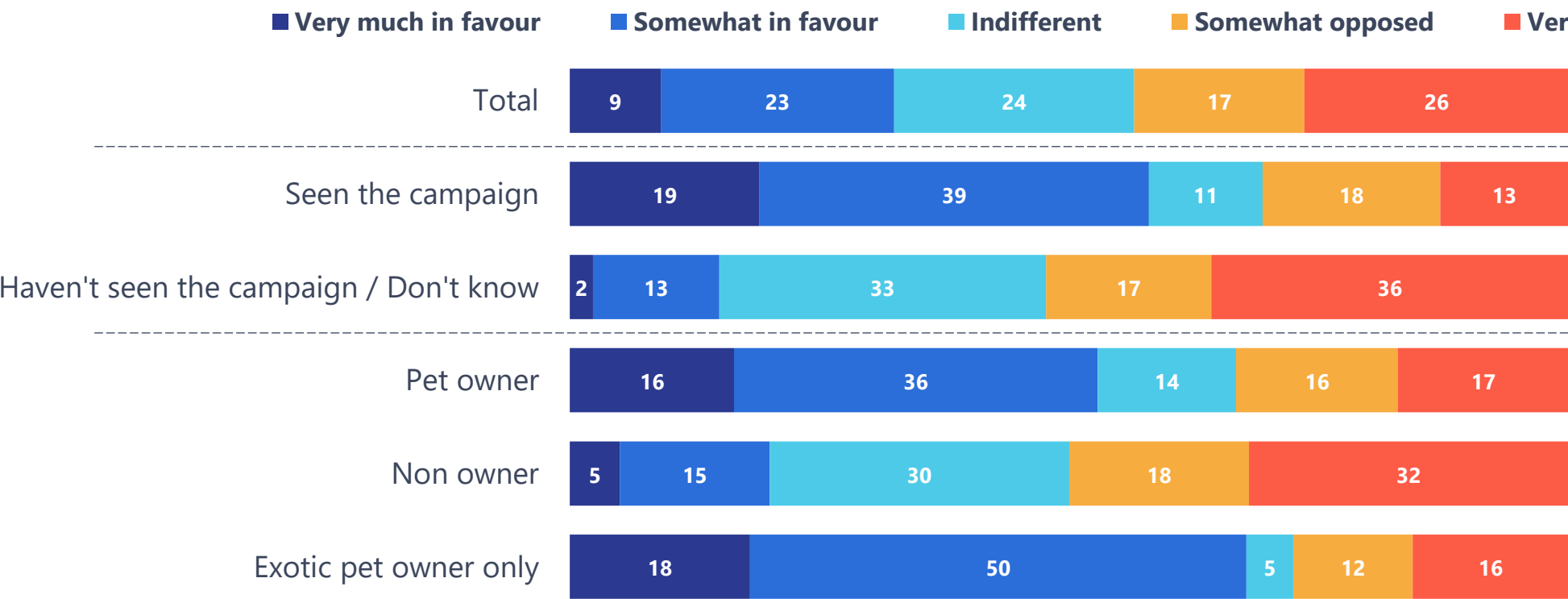
Non-owners		Top Reasons for Not Wanting to Own Any Focus Pets (%)					
	Total (n=849)	High interest, exposed (n=45)	High interest, not exposed (n=177)	Low neutral interest, exposed (n=61)	Low neutral interest not exposed (n=382)	Low interest exposed (n=54)	Low interest not exposed (n=280)
Legality considerations	7%	9%	4%	9%	4%	11%	5%
Health considerations	7%	11%	5%	10%	8%	10%	9%
I am more interested in other pets	6%	5%	5%	2%	4%	0%	3%
I do not think it is socially acceptable	5%	9%	5%	4%	5%	3%	5%
Other household members don't want them	5%	10%	7%	8%	4%	9%	4%
No veterinary clinics that can care for it	5%	3%	4%	12%	3%	11%	2%
May contribute to species decline	5%	10%	3%	14%	3%	15%	2%
Released pets can damage the environment	4%	7%	2%	7%	3%	8%	4%
Not compatible with animals I already own	3%	3%	0%	1%	0%	2%	0%
Other	1%	2%	1%	0%	1%	0%	1%

Note: See slide 6 for grouping classifications

Attitude towards Owning Focus Pets

Participants who recalled the campaign are more likely to express favourable attitudes toward owning focus pets, while those who did not recall the campaign are more likely to be opposed or indifferent. More favourable attitudes are also observed among pet owners, particularly those who own exotic pets, compared with non-owners.

Perceived Attitudes Toward Owning Focus Pets (%)



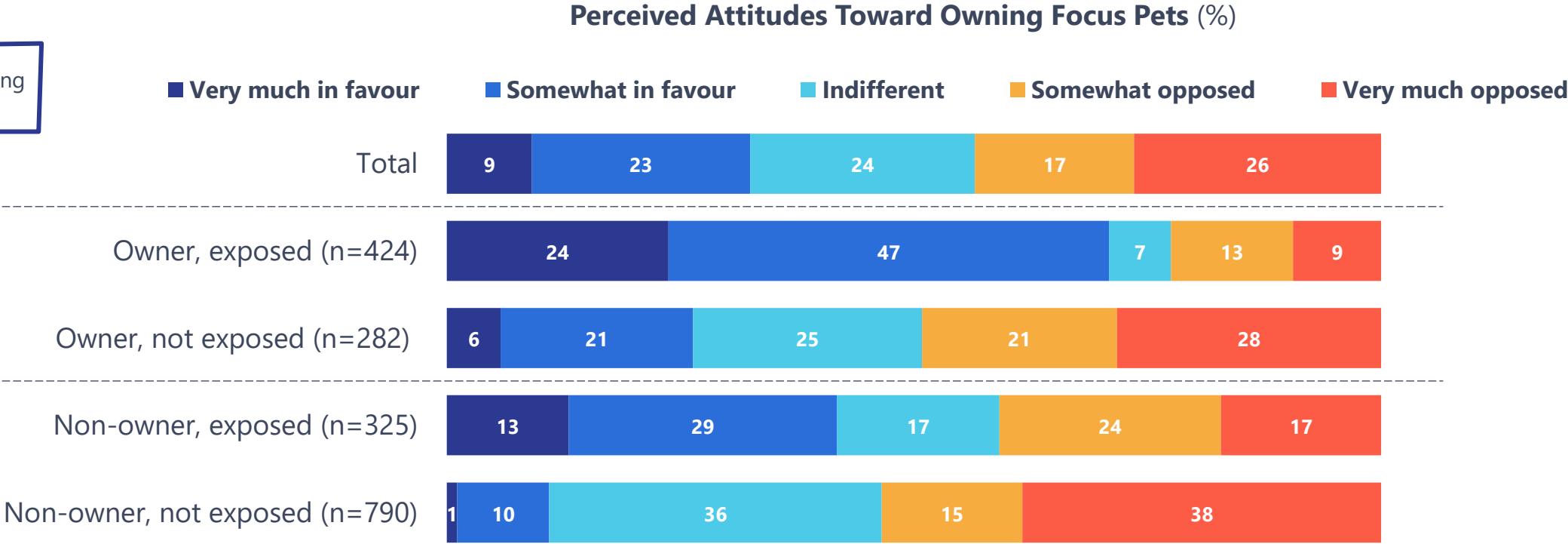
Though the sample size is small, perception of acceptability is significantly lower among those who saw the campaign 4 or more times, compared with those recall the campaign twice or three times

- Saw the campaign once (n=337) – 50% are in favour
- Twice (n=269) – 68%
- Three times (n=87) – 64%
- Four or more times (n=56) – 45%

Attitude towards Owning Focus Pets - By Ownership and Exposure

Participants who recalled the campaign are more likely to express favourable attitudes toward owning focus pets than those who did not recall it. This pattern is observed across both pet owners and non-owners.

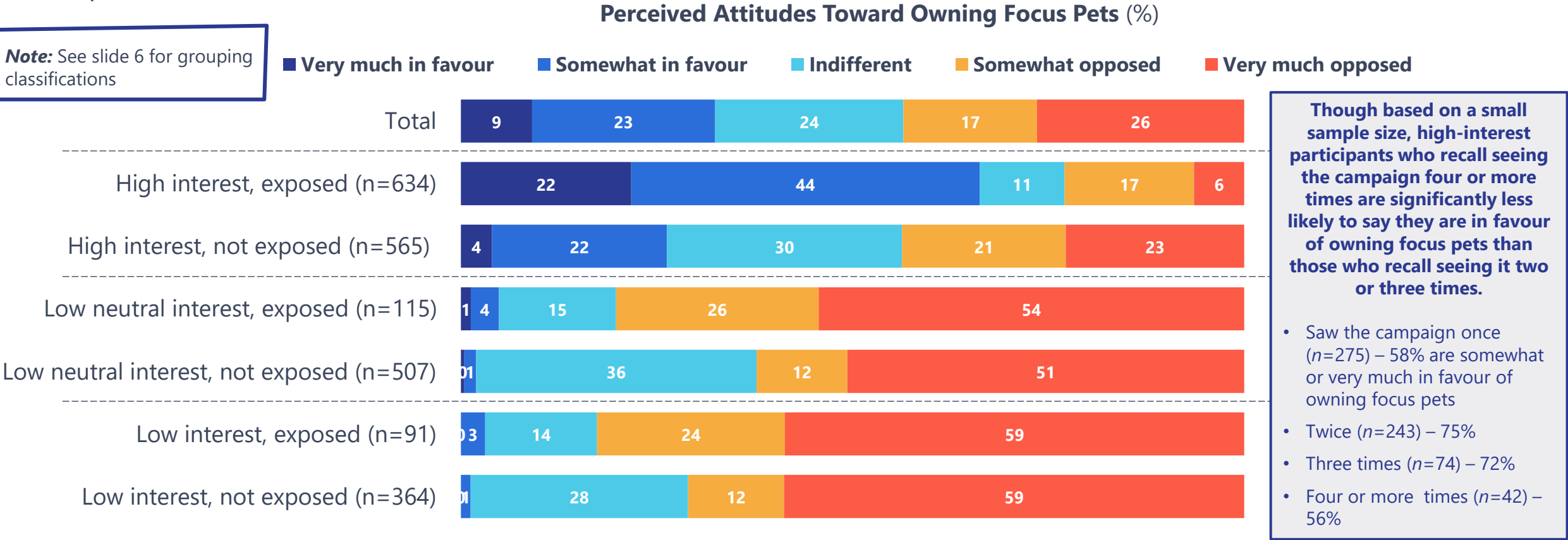
Note: See slide 6 for grouping classifications



Attitude towards Owning Focus Pets - By Interest and Exposure

Those high-interest participants who recall the campaign show more favourable attitudes toward ownership, while among low-neutral and low-interest groups, those exposed participants report more negative views compared to non-exposed participants, with significantly more of the exposed group in each segment saying they are somewhat opposed to owning focus pets.

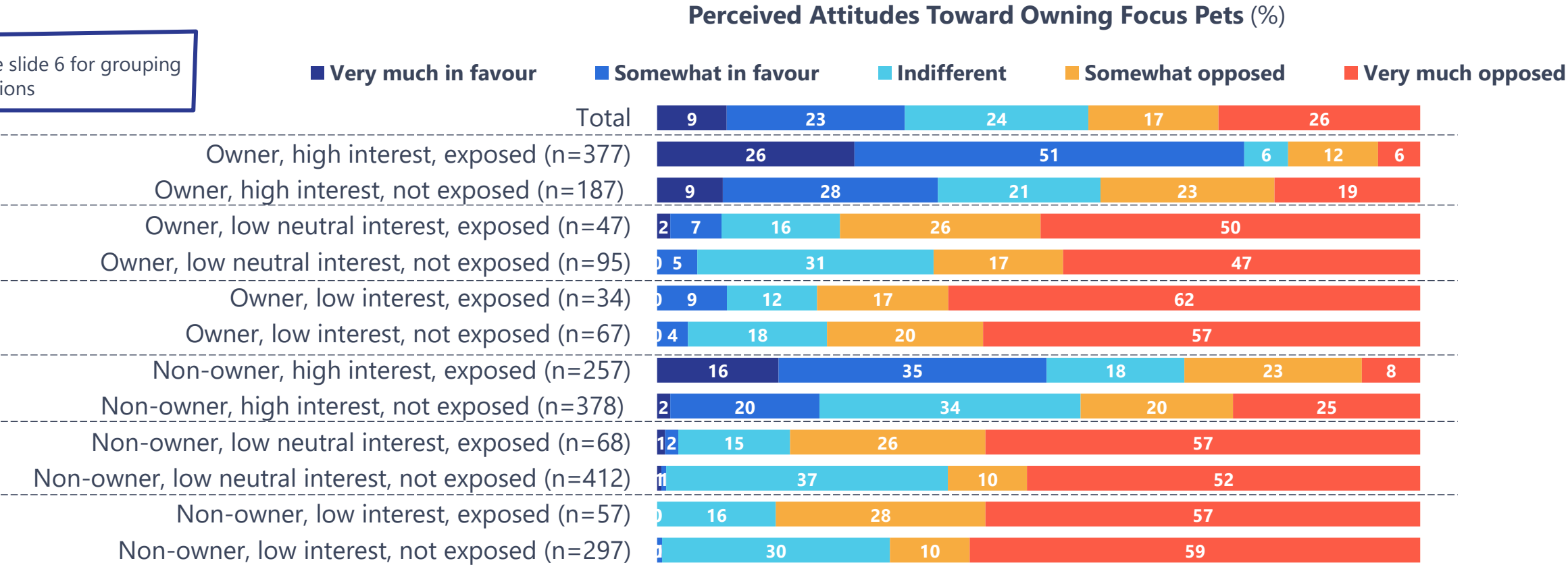
Note: See slide 6 for grouping classifications



Attitude towards Owning Focus Pets – By Ownership, Interest, and Exposure

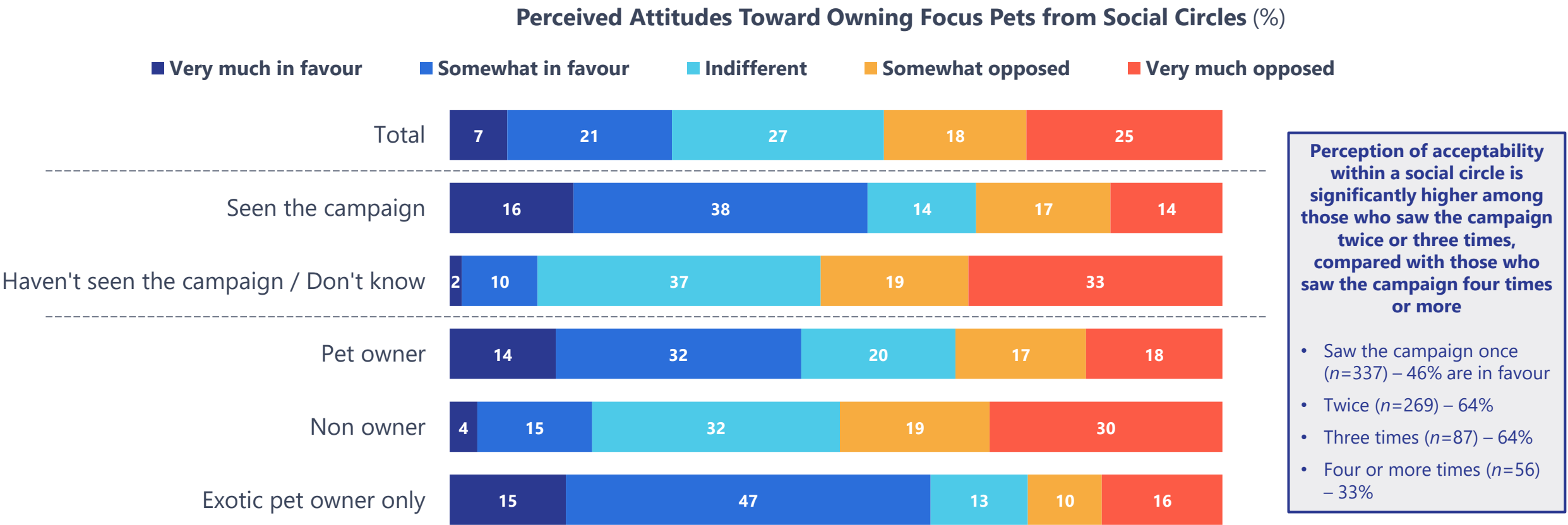
Across ownership and interest groups, favourable attitudes are highest among high-interest participants who recalled the campaign, and lowest among low-interest groups.

Note: See slide 6 for grouping classifications



Expected Attitude of Social Circle towards Owning Focus Pets

While participants who recall the campaign tend to report more favourable attitudes, perceived social acceptability appears to decline among those exposed four or more times, suggesting a reduced sense that owning focus pets is acceptable within their social circles.

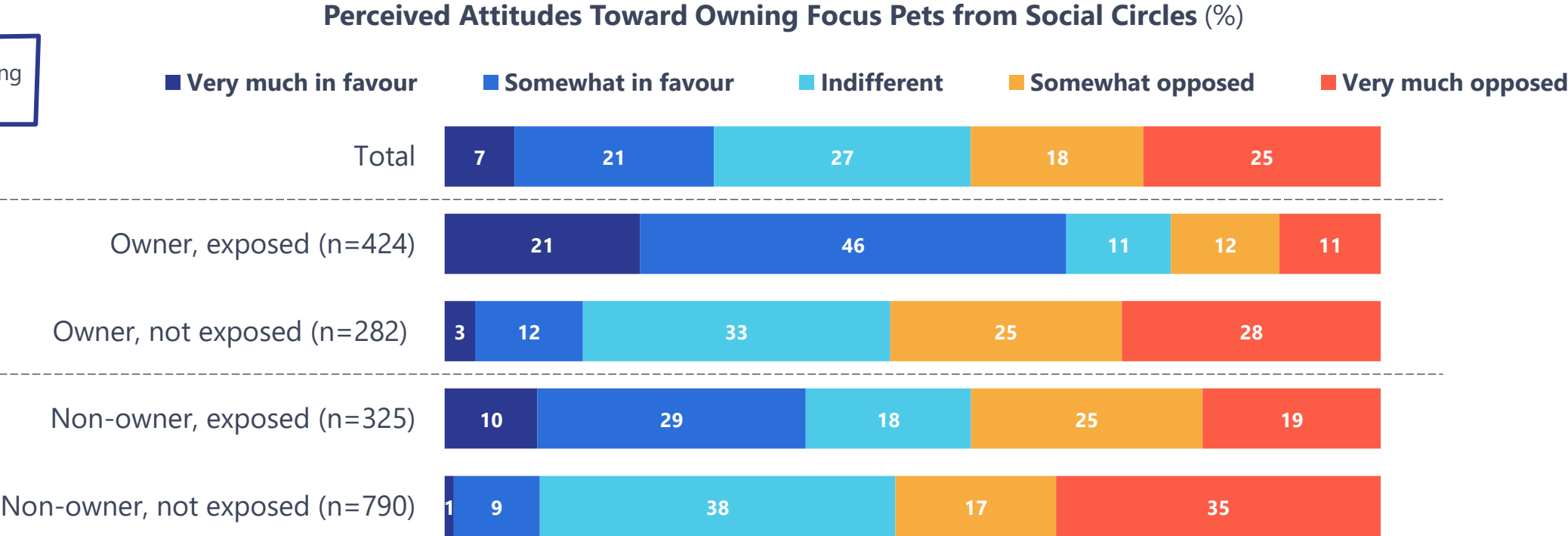


Q3.3 What do you feel the attitude towards owning focus pets would be from your friends, family, and community (including SNS)? Base: Total unweighted sample, n=1,821; Seen the campaign, n=749; Haven't seen the campaign / Don't know, n=1,072; Pet owner, n=706; Non owner, n=1,115; Focus pet owner only, n=46

Expected Attitude of Social Circle towards Owning Focus Pets - By Ownership and Exposure

As with attitudes toward ownership, participants who recalled the campaign are more likely to expect favourable attitudes from their social circles, with similar patterns observed across pet owners and non-owners.

Note: See slide 6 for grouping classifications



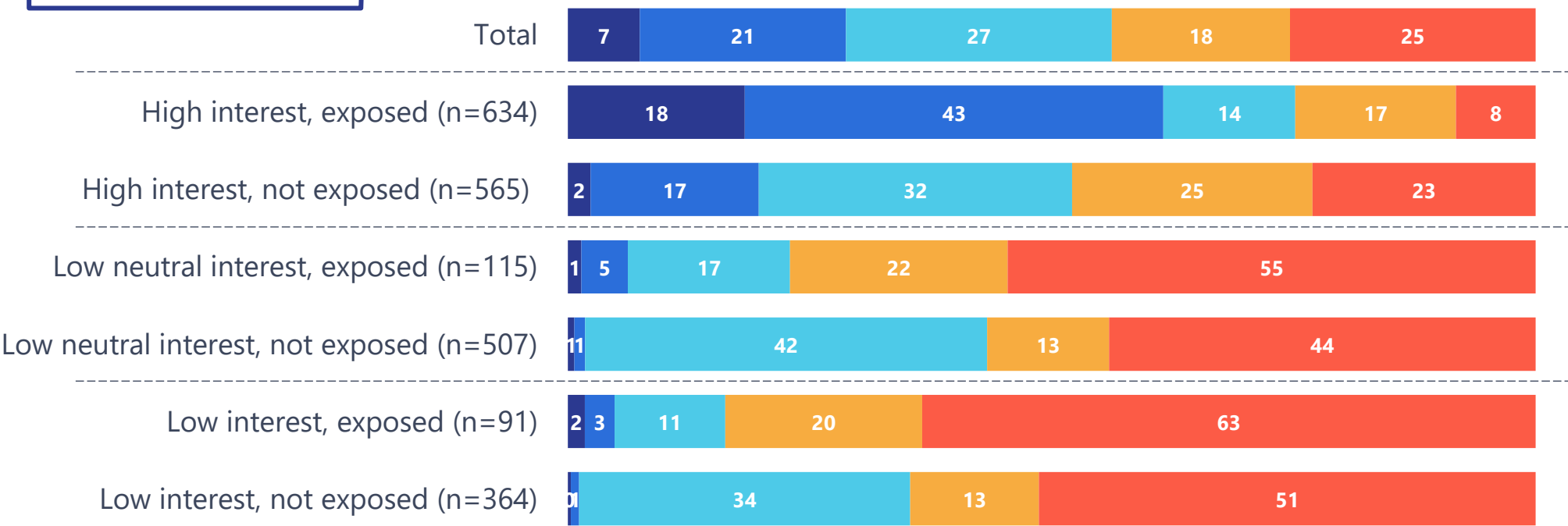
Expected Attitude of Social Circle towards Owning Focus Pets - By Interest and Exposure

High-interest participants show higher perceived social acceptance, while among low-neutral and low-interest groups, exposed participants report more negative perceptions compared to non-exposed participants.

Perceived Attitudes Toward Owning Focus Pets from Social Circles (%)

Note: See slide 6 for grouping classifications

■ Very much in favour ■ Somewhat in favour ■ Indifferent ■ Somewhat opposed ■ Very much opposed



Though based on a small sample size, high-interest participants who recall seeing the campaign four or more times are significantly less likely to say their social circle would be in favour of owning focus pets than those who recall seeing it two or three times.

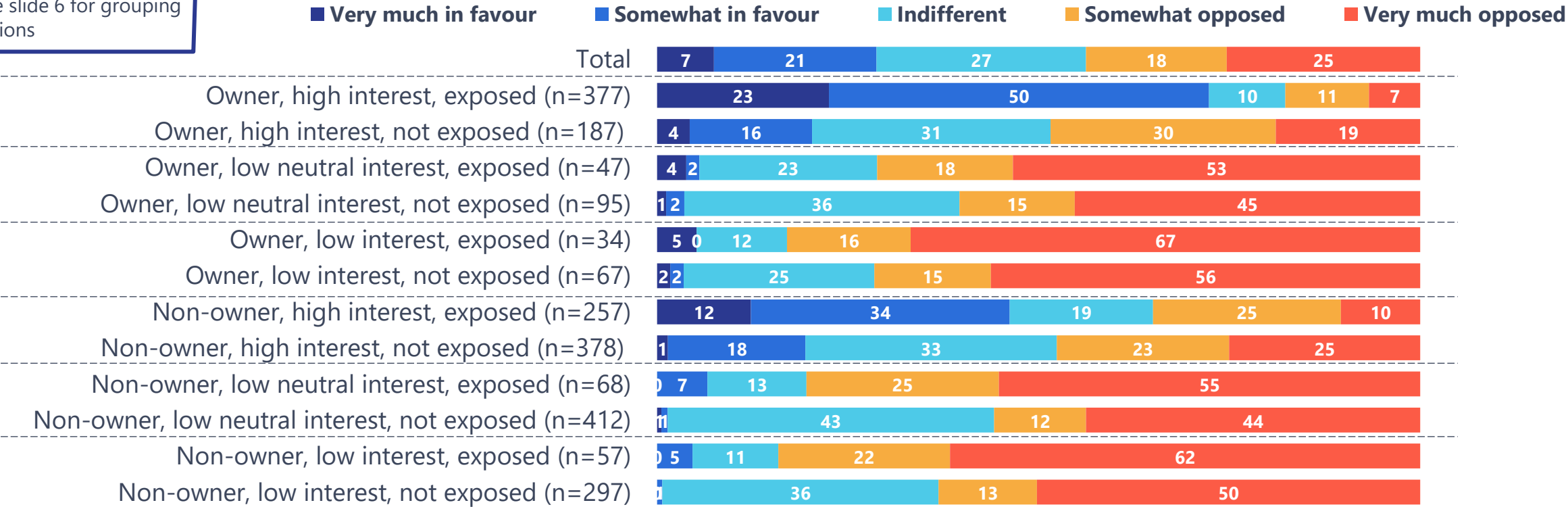
- Saw the campaign once (n=275) – 53% expect their social circle to be somewhat or very much in favour of owning focus pets
- Twice (n=243) – 71%
- Three times (n=74) – 72%
- Four or more times (n=42) – 41%

Expected Attitude of Social Circle towards Owning Focus Pets – By Ownership, Interest, and Exposure

Across ownership and interest groups, perceived social approval is highest among high-interest participants who recalled the campaign, and lowest among low-interest groups, consistent with patterns observed in earlier sections.

Note: See slide 6 for grouping classifications

Perceived Attitudes Toward Owning Focus Pets from Social Circles (%)



Drivers and Deterrents of Owning a Focus Pet

Participants are more likely to agree with deterrents than drivers of owning focus pets. Ethical, welfare, and environmental concerns, such as challenges in providing appropriate care, the belief that focus pets should live in their natural habitat, and risks related to smuggling and environmental harm, are among the most commonly cited considerations. Agreement with potential benefits of ownership, including personal enjoyment, social approval, or practical gains, is lower overall, indicating that deterrents are more widely acknowledged than perceived benefits.



Deterrents of Owning a Focus Pet - By Ownership and Exposure

Pet owners who recalled the campaign show consistently higher levels of agreement across most deterrent statements than any other group. Non-owners who did not recall the campaign tend to show the lowest levels of agreement overall. The only attribute that is agreed on at statistically similar levels across all groups is that the owner wouldn't be able to make the animal happy.

“Strongly” and “Somewhat Agree” (%)

	Total (n=1,821)	Owner, exposed (n=424)	Owner, not exposed (n=282)	Non-owner, exposed (n=325)	Non-owner, not exposed (n=790)
It can be challenging to provide appropriate enclosures for focus pets	73%	79%	75%	67%	73%
Focus pets should live in their natural habitat	72%	80%	71%	68%	69%
Demand for focus pets may lead to the smuggling of animals from overseas	62%	78%	63%	60%	55%
Might be aggressive/dangerous to people	60%	69%	59%	60%	55%
Releasing pets into the wild can harm the environment	58%	67%	60%	53%	54%
Does or may spread diseases to humans	56%	61%	53%	59%	54%
I won't be able to make them happy	53%	54%	54%	57%	51%
May bring them to extinction in the wild	50%	69%	51%	54%	38%

Note: See slide 6 for grouping classifications

Table continued on next slide

Drivers of Owning a Focus Pet - By Ownership and Exposure

Among pet owners who recall seeing the campaign, agreement with several drivers, such as personal enjoyment, social approval, and perceived benefits of ownership, is at levels comparable to or exceeding agreement with deterrents. Compared with non-owners, pet owners who did not recall the campaign are also more likely to agree with a range of drivers, including anticipated personal enjoyment, social approval, perceived health benefits, and more permissive views on ownership, although these differences are less pronounced than among those who recalled the campaign.

“Strongly” and “Somewhat Agree” (%)

	Total (n=1,821)	Owner, exposed (n=424)	Owner, not exposed (n=282)	Non-owner, exposed (n=325)	Non-owner, not exposed (n=790)
People who can own and manage focus pets properly should feel free to do so	45%	71%	38%	49%	33%
Happier living with people than in the wild	41%	63%	37%	43%	30%
Would make me feel happy	34%	69%	28%	41%	15%
Attracts positive attention of other people	34%	66%	26%	40%	17%
Would positively impact my health condition	34%	66%	25%	38%	18%
Might help protect them from extinction	33%	65%	26%	42%	16%
Owning focus pets is socially acceptable	28%	61%	18%	34%	12%
My friends would like it if I owned a focus pet	27%	65%	14%	35%	9%
Could bring income	23%	58%	8%	28%	8%

Note: See slide 6 for grouping classifications

Deterrents of Focus Pet Purchase - By Interest and Exposure (1/3)

Agreement with deterrent statements varies more clearly by interest than by campaign recall. Participants with lower levels of interest who recalled the campaign tend to show higher agreement with several deterrents, including concerns related to disease, extinction risk, and the inability to provide appropriate care. In contrast, participants with high interest show more moderate or consistent levels of agreement across most deterrents, regardless of campaign recall.

“Strongly” and “Somewhat Agree” (%)

	Total (n=1,821)	High interest, exposed (n=634)	High interest, not exposed (n=565)	Low neutral interest, exposed (n=115)	Low neutral interest not exposed (n=507)	Low interest exposed (n=91)	Low interest not exposed (n=364)
It can be challenging to provide appropriate enclosures for focus pets	73%	74%	78%	74%	67%	75%	76%
Focus Pets should live in their natural habitat	72%	74%	71%	78%	69%	81%	76%
Demand for focus pets may lead to the smuggling of animals from overseas	62%	70%	60%	69%	53%	66%	60%
Might be aggressive/dangerous to people	60%	64%	58%	70%	54%	76%	61%
Releasing pets into the wild can harm the environment	58%	62%	58%	54%	52%	48%	60%
Does or may spread diseases to humans	56%	58%	54%	72%	54%	75%	63%
I won't be able to make them happy	53%	53%	50%	69%	54%	73%	63%
May bring them to extinction in the wild	50%	61%	42%	72%	41%	76%	47%

Note: See slide 6 for grouping classifications

Table continued on next slide

Drivers of Focus Pet Purchase - By Interest and Exposure (2/3)

Agreement with driver statements is concentrated among participants with high interest in interacting with focus pets, particularly those who recalled the campaign. This group shows consistently higher levels of agreement across drivers such as personal enjoyment, social approval, and perceived benefits of ownership.

“Strongly” and “Somewhat Agree” (%)

	Total (n=1,821)	High interest, exposed (n=634)	High interest, not exposed (n=565)	Low neutral interest, exposed (n=115)	Low neutral interest not exposed (n=507)	Low interest exposed (n=91)	Low interest not exposed (n=364)
People who can own and manage focus pets properly should feel free to do so	45%	68%	47%	19%	20%	17%	21%
Happier living with people than in the wild	41%	58%	32%	29%	31%	29%	34%
Would make me feel happy	34%	64%	31%	9%	4%	8%	4%
Attracts positive attention of other people	34%	61%	28%	9%	10%	9%	11%
Would positively impact my health condition	34%	60%	25%	13%	13%	11%	14%
Might help protect them from extinction	33%	61%	26%	17%	11%	17%	11%
Owning focus pets is socially acceptable	28%	56%	18%	5%	9%	2%	9%
My friends would like it if I owned a focus pet	27%	58%	15%	9%	4%	7%	4%
Could bring income	23%	50%	10%	9%	6%	7%	7%

Note: See slide 6 for grouping classifications

Drivers of Focus Pet Purchase - By Interest and Exposure (3/3)

Among high-interest participants, disagreement with the statement that focus pets are happier living with people than in the wild is highest among those who recall seeing the campaign four or more times. Although this subgroup has a small sample size, they are significantly more likely to somewhat or strongly disagree with the statement than those who recall seeing the campaign once, twice, or three times.

“Strongly” and “Somewhat Disagree” (%)

	Total (n=1,821)	High interest, exposed once (n=275)	High interest, exposed twice (n=243)	High interest, exposed three times (n=74)	High interest, exposed four times (n=42)
Focus pets are happier living with people than in the wild	30%	21%	17%	16%	38%

Note: See slide 6 for grouping classifications

Deterrents of Focus Pet Purchase - By Interest and Exposure Among Owners (1a/2)

Across pet owners, agreement with deterrent statements is broadly consistent, with no clear pattern of variation across interest or campaign recall groups. Differences between segments are limited, and no single group consistently stands out across most deterrents.

Owners	"Strongly" and "Somewhat Agree" (%)						
	Total (n=1,821)	High interest, exposed (n=377)	High interest, not exposed (n=187)	Low neutral interest, exposed (n=47)	Low neutral interest not exposed (n=95)	Low interest exposed (n=34)	Low interest not exposed (n=67)
It can be challenging to provide appropriate enclosures for focus pets	73%	80%	77%	72%	72%	74%	83%
Focus pets should live in their natural habitat	72%	81%	70%	77%	74%	84%	84%
Demand for focus pets may lead to the smuggling of animals from overseas	62%	78%	63%	75%	63%	72%	70%
Might be aggressive/dangerous to people	60%	68%	58%	71%	62%	76%	70%
Releasing pets into the wild can harm the environment	58%	68%	64%	56%	50%	52%	61%
Does or may spread diseases to humans	56%	61%	51%	58%	58%	66%	68%
I won't be able to make them happy	53%	52%	52%	75%	58%	82%	69%
May bring them to extinction in the wild	50%	69%	52%	70%	50%	78%	62%

Note: See slide 6 for grouping classifications

Table continued on next slide

Drivers of Focus Pet Purchase - By Interest and Exposure Among Owners (1b/2)

Unlike in deterrents, pet owners with a high interest in interacting with focus pets who recall the campaign are significantly more likely to agree with the drivers of focus pet ownership.

Owners	"Strongly" and "Somewhat Agree" (%)						
	Total (n=1,821)	High interest, exposed (n=377)	High interest, not exposed (n=187)	Low neutral interest, exposed (n=47)	Low neutral interest not exposed (n=95)	Low interest exposed (n=34)	Low interest not exposed (n=67)
People who can own and manage focus pets properly should feel free to do so	45%	75%	48%	29%	16%	33%	22%
Happier living with people than in the wild	41%	66%	38%	28%	37%	31%	40%
Would make me feel happy	34%	74%	39%	16%	6%	22%	9%
Attracts positive attention of other people	34%	71%	33%	17%	12%	19%	16%
Would positively impact my health condition	34%	71%	29%	17%	16%	14%	23%
Might help protect them from extinction	33%	69%	33%	19%	14%	19%	19%
Owning focus pets is socially acceptable	28%	66%	22%	5%	11%	4%	14%
My friends would like it if I owned a focus pet	27%	71%	19%	6%	5%	6%	7%
Could bring income	23%	62%	8%	10%	8%	14%	12%

Note: See slide 6 for grouping classifications

Table continued on next slide

Deterrents of Focus Pet Purchase - By Interest and Exposure Among Non-owners (2a/2)

As with pet owners, in non-owners, agreement with deterrent statements is broadly consistent, with no clear pattern of variation across interest or campaign recall groups. Differences between segments are limited, and no single group consistently stands out across most deterrents.

Non-owners		"Strongly" and "Somewhat Agree" (%)					
	Total (n=1,821)	High interest, exposed (n=257)	High interest, not exposed (n=378)	Low neutral interest, exposed (n=68)	Low neutral interest not exposed (n=412)	Low interest exposed (n=57)	Low interest not exposed (n=297)
It can be challenging to provide appropriate enclosures for focus pets	73%	65%	79%	75%	66%	75%	74%
Focus pets should live in their natural habitat	72%	66%	71%	79%	68%	80%	74%
Demand for focus pets may lead to the smuggling of animals from overseas	62%	59%	59%	66%	51%	63%	58%
Might be aggressive/dangerous to people	60%	57%	59%	70%	52%	77%	59%
Releasing pets into the wild can harm the environment	58%	53%	55%	53%	52%	46%	60%
Does or may spread diseases to humans	56%	54%	55%	79%	53%	80%	61%
I won't be able to make them happy	53%	55%	49%	66%	53%	68%	61%
May bring them to extinction in the wild	50%	49%	37%	74%	39%	75%	44%

Note: See slide 6 for grouping classifications

Table continued on next slide

Drivers of Focus Pet Purchase - By Interest and Exposure Among Non-owners (2b/2)

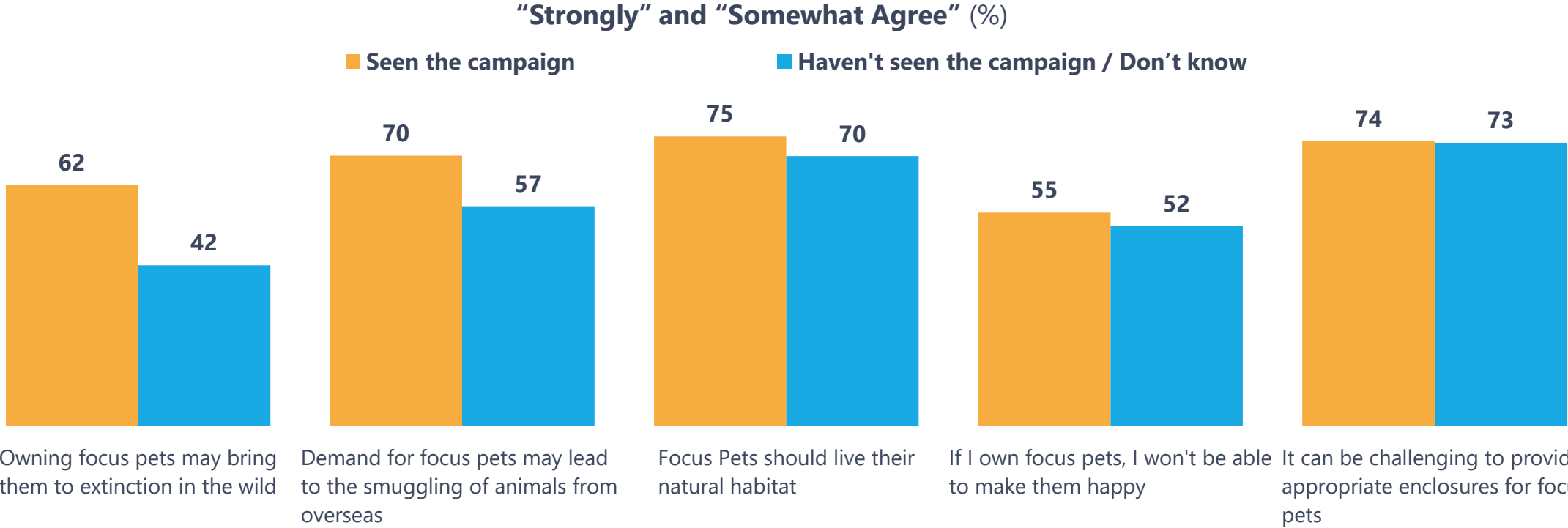
As with pet owners, non owners with a high interest in interacting with focus pets who recall seeing the campaign are significantly more likely to agree with the drivers of focus pet ownership, though at a lower rate than pet owners.

Non-owners		"Strongly" and "Somewhat Agree" (%)					
	Total (n=1,821)	High interest, exposed (n=257)	High interest, not exposed (n=378)	Low neutral interest, exposed (n=68)	Low neutral interest not exposed (n=412)	Low interest exposed (n=57)	Low interest not exposed (n=297)
People who can own and manage focus pets properly should feel free to do so	45%	57%	46%	13%	20%	8%	21%
Happier living with people than in the wild	41%	46%	30%	29%	29%	28%	33%
Would make me feel happy	34%	50%	27%	4%	4%	1%	3%
Attracts positive attention of other people	34%	48%	26%	5%	9%	4%	9%
Would positively impact my health condition	34%	45%	24%	11%	12%	10%	13%
Might help protect them from extinction	33%	48%	23%	16%	10%	16%	10%
Owning focus pets is socially acceptable	28%	40%	17%	5%	9%	1%	8%
My friends would like it if I owned a focus pet	27%	41%	14%	10%	4%	7%	3%
Could bring income	23%	33%	11%	8%	6%	4%	6%

Note: See slide 6 for grouping classifications

Perception of Selected Deterrents – By Campaign Awareness

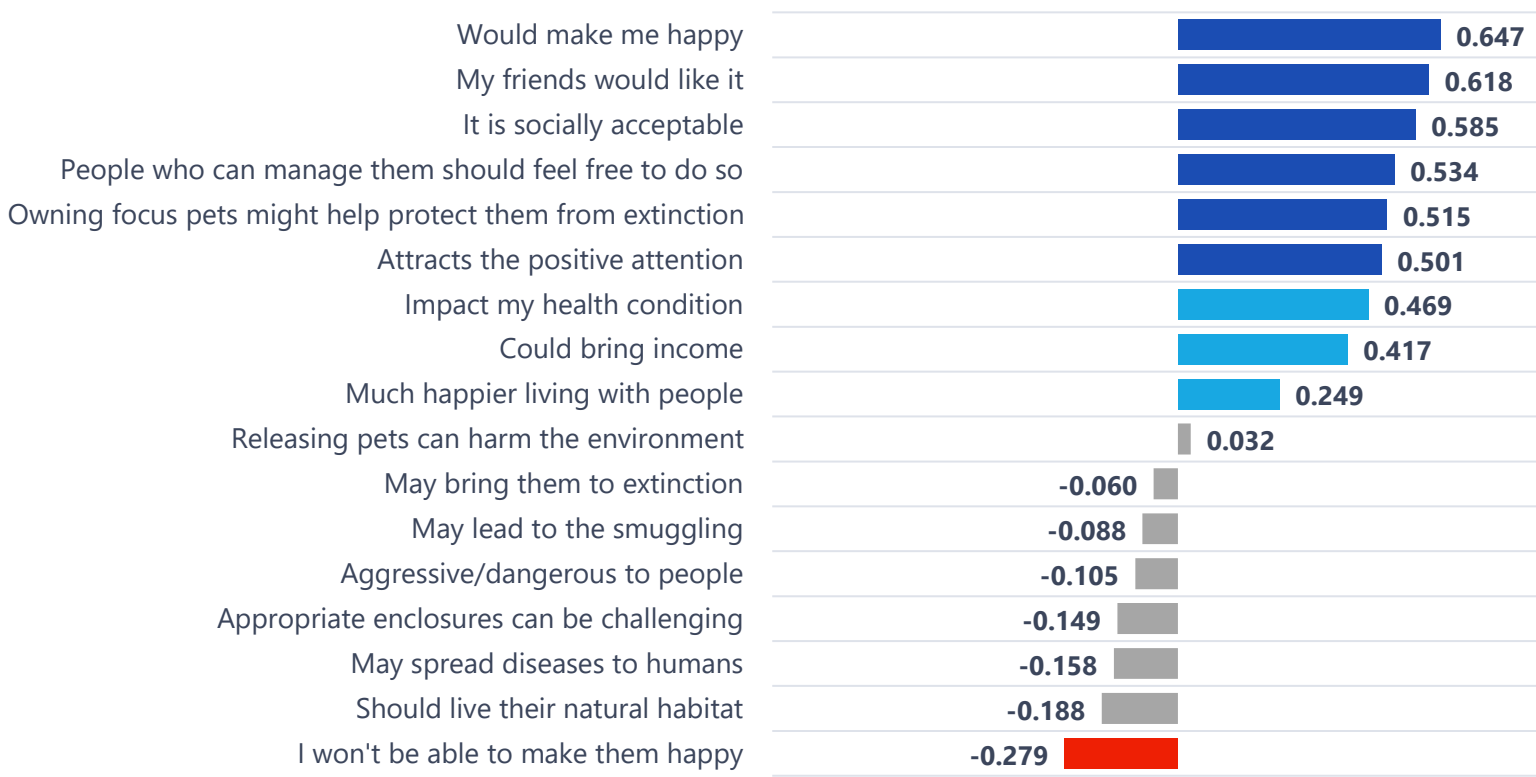
Participants who recalled the campaign are more likely to agree with a range of ethical and conservation-related deterrents, including that owning focus pets may contribute to species decline, may be linked to smuggling, and that focus pets should live in their natural habitat. In contrast, levels of agreement are more similar across groups for practical concerns such as challenges in providing appropriate enclosures.



63 Q3.5 Please indicate how much you agree/disagree with these statements in relation to owning focus pets. Base: Total unweighted sample, n=1,821; Seen the campaign, n=749; Haven't seen the campaign / Don't know, n=1,072

Correlates of Attitudes Toward Owning Focus Pets

Bars show correlations with overall attitude toward owning focus pets. Values between -0.20 and $+0.20$ indicate very weak relationships and are treated as non-drivers. Most deterrents to owning a focus pet have a weak influence on participants' overall attitudes towards owning exotic pets. However, emotional messaging also shows a relatively weak association, suggesting such messaging may play a role.

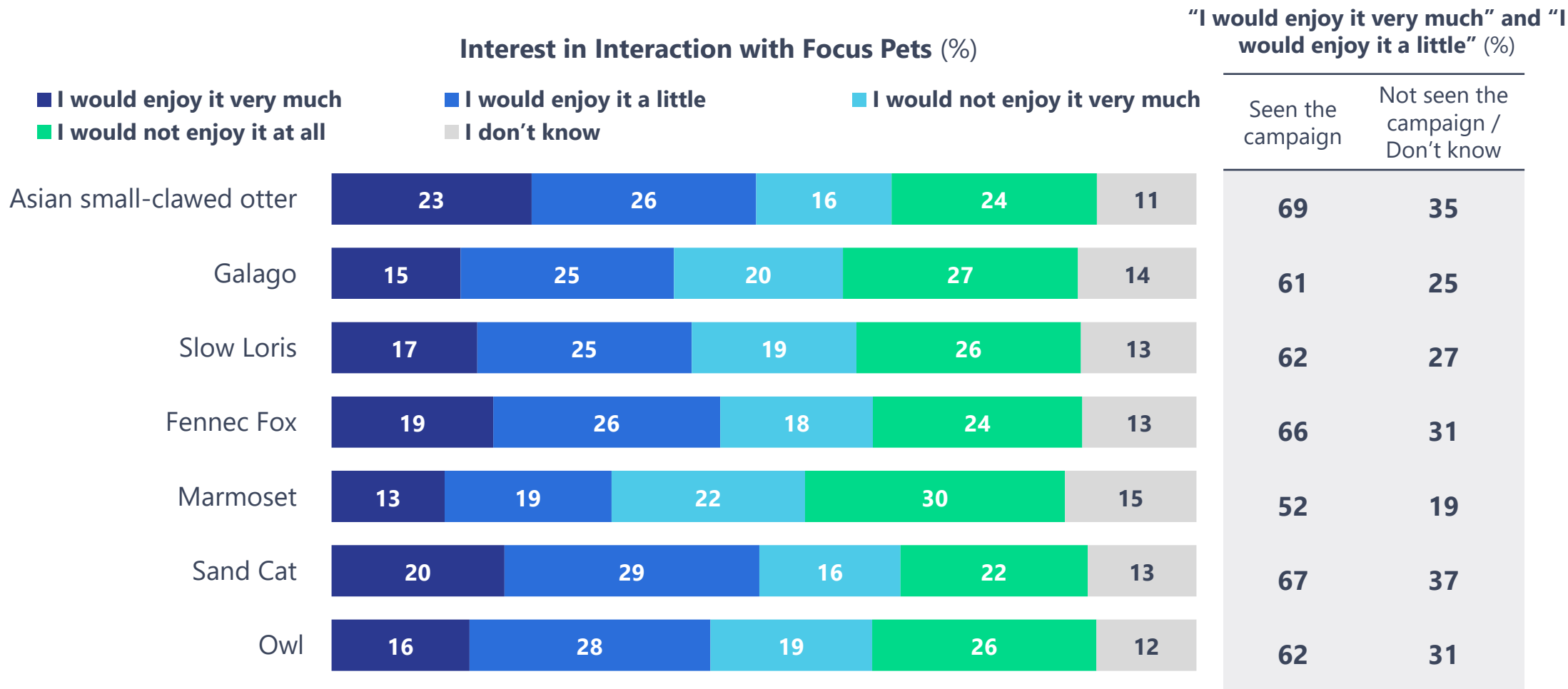


For those who recall seeing the campaign and would consider owning at least one focus pet, importance scores for deterrent statements are very close to zero, indicating that agreement with risks such as environmental harm or extinction (even when strongly endorsed) is not strongly related to their overall attitude toward owning focus pets.

- Strong drivers of positive attitude towards owning focus pets
- Moderate drivers of positive attitude towards owning focus pets
- Not a driver, positively or negatively, of attitude towards owning focus pets
- Weak drivers of negative attitude towards owning focus pets

Interests in Interaction with Focus Pets

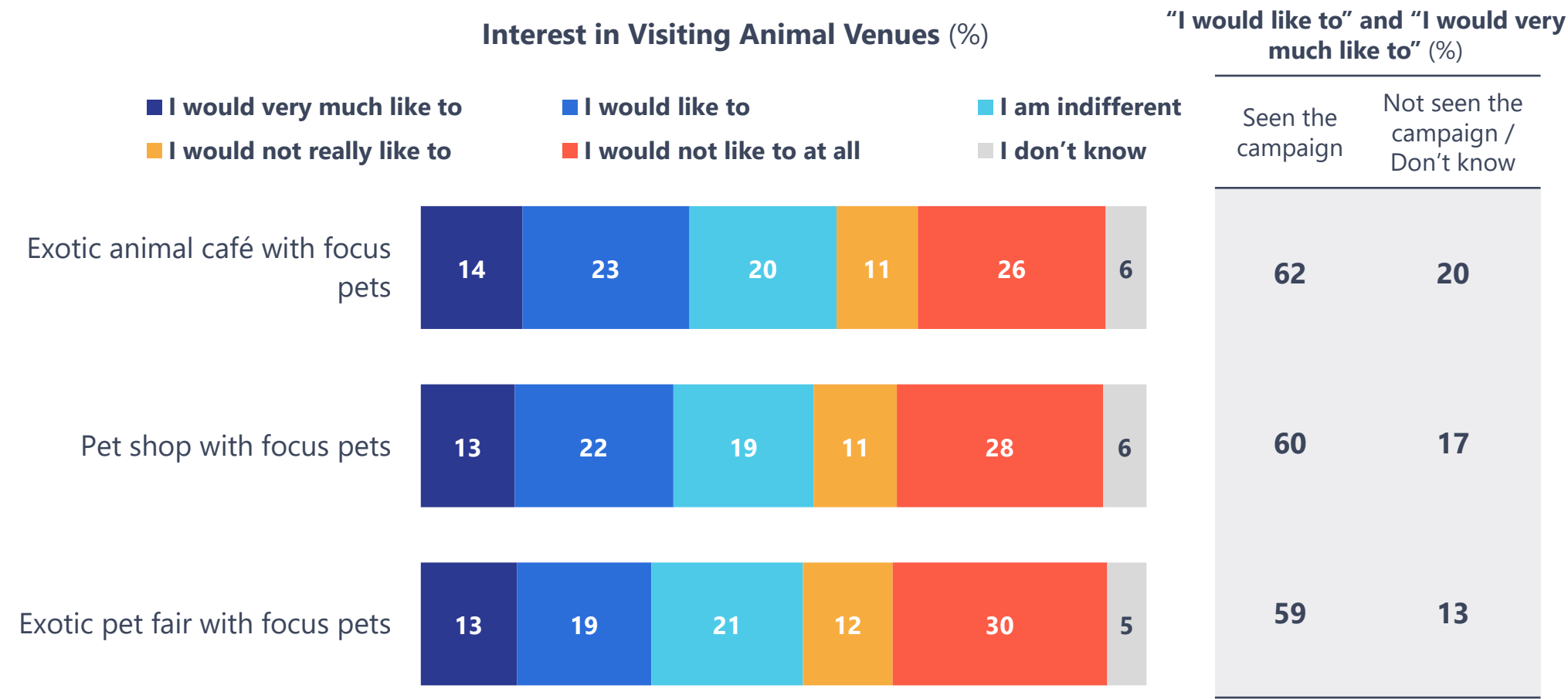
Participants who recall having seen the campaign ($n=749$) are significantly more likely to say they would like to interact with focus pets, while those who do not recall seeing the campaign are more likely to express disinterest.



65 Q3.6 How much would you enjoy interacting with the focus pets (e.g., holding or playing with them)? Base: Total unweighted sample, $n=1,821$; Seen the campaign, $n=749$; Haven't seen the campaign / Don't know, $n=1,072$

Interests in Visiting Animal Venues with Focus Pets

Participants who recall seeing the campaign (*n*=749) are significantly more likely to say they would like to visit venues featuring focus pets, while those who have not seen the campaign are more likely to express disinterest.



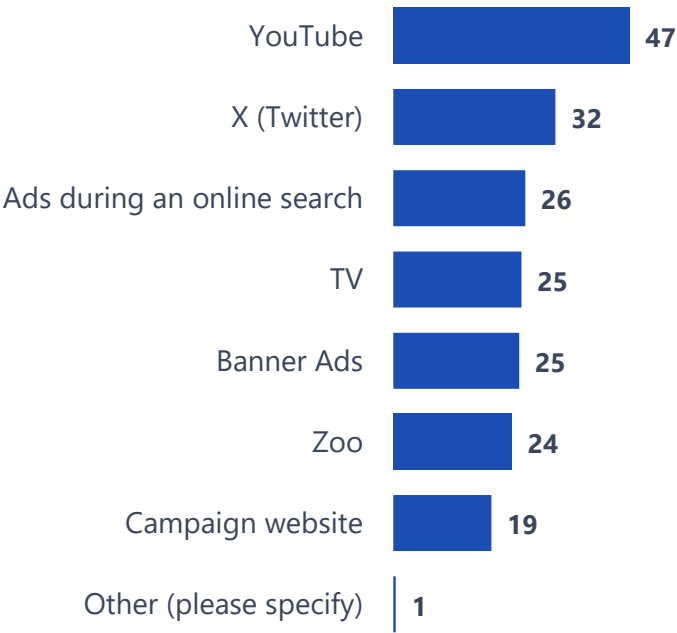
3.3 Campaign Perceptions



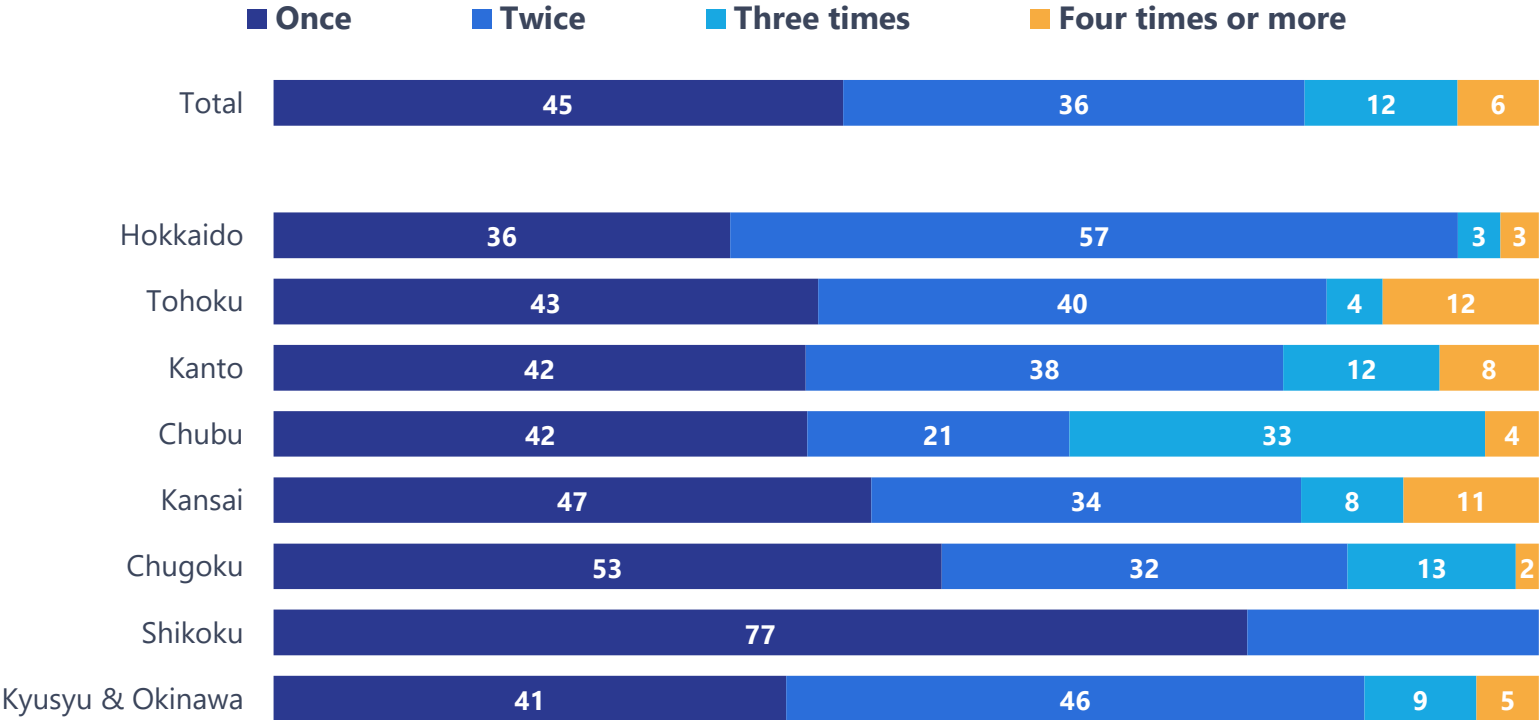
Where and How Often the Campaign Was Seen

The campaign was most commonly encountered through digital channels, particularly YouTube and X (Twitter). Most participants report seeing the campaign once or twice, with repeated exposure less common across all regions. Regional patterns suggest broadly similar exposure profiles, with Shikoku showing significantly less engagement than in other regions.

Channels Where the Campaign Was Seen (%)



Frequency of Seeing the Campaign (%)



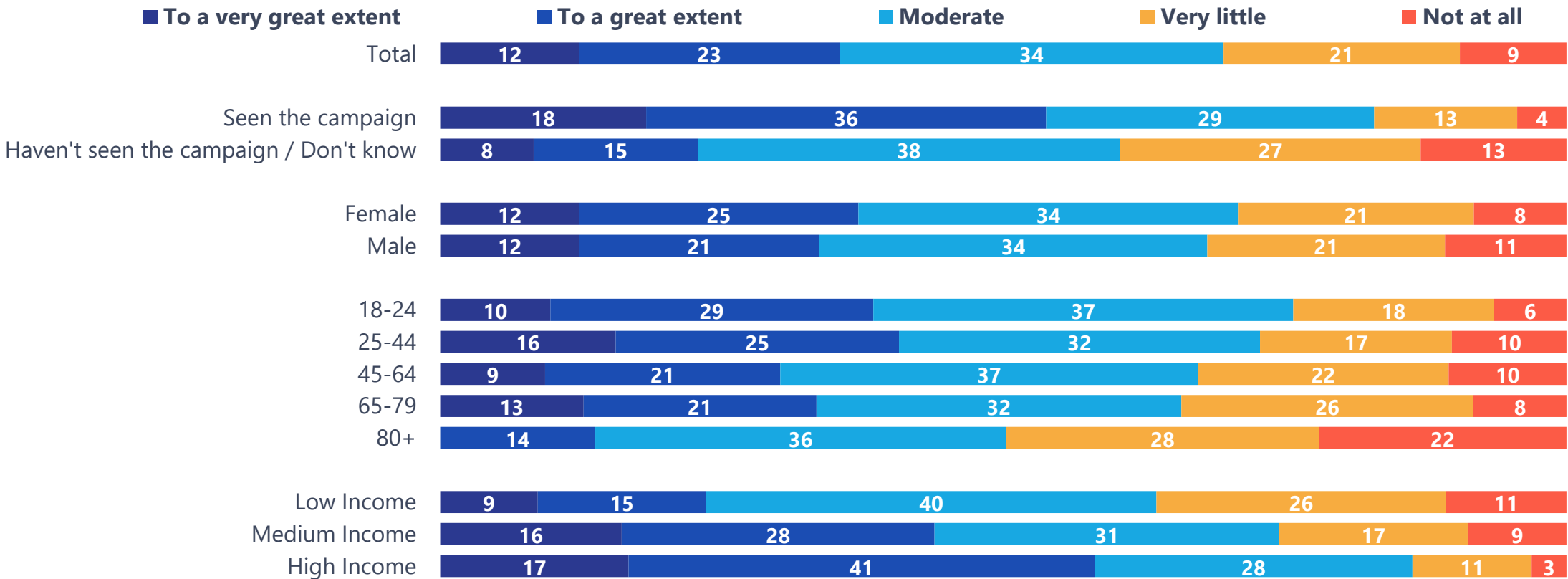
Q4.2 Where did you see this campaign before today? Please select all that apply. Base: Those who recall seeing the campaign, n=749

Q4.3 How often did you see this campaign before today? Base: Those who recall seeing the campaign, n=749

Impression of the Campaign

Participants who recall seeing the campaign report a significantly stronger overall impression than those who have not, particularly among younger and higher-income groups. However, many participants describe the campaign's impact as moderate, suggesting that while it is noticed, the strength of its impression varies across audiences.

Campaign Impression on Participants (%)

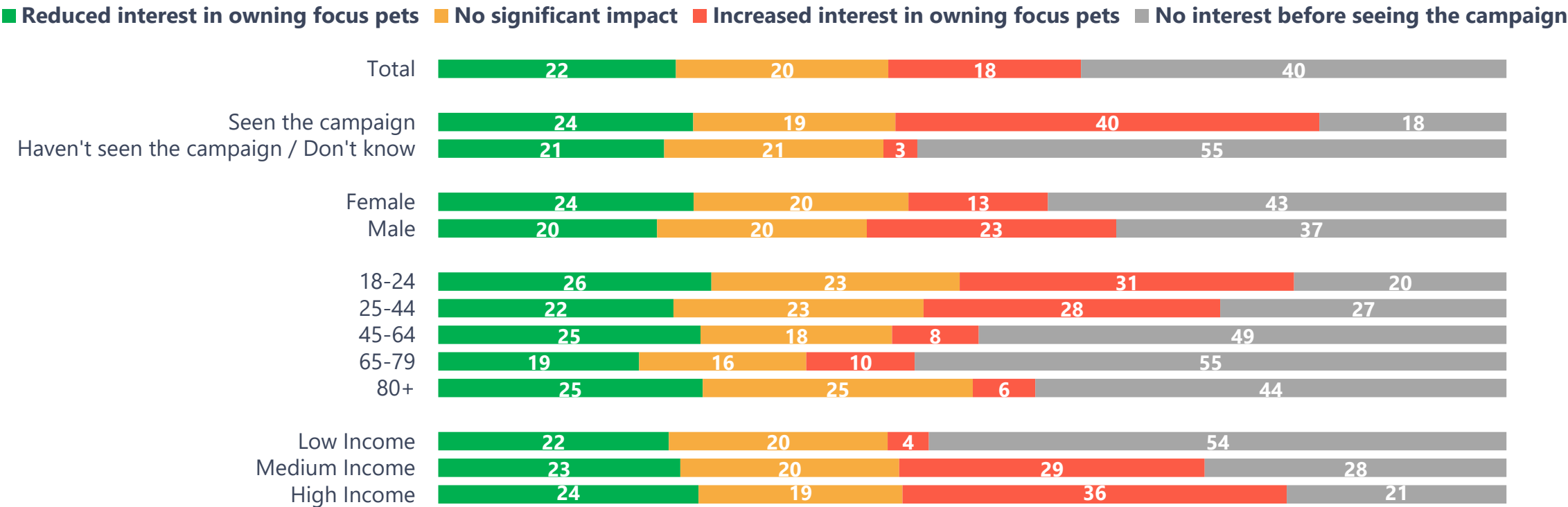


Note: All participants were shown the campaign before being asked about it

Impression of the Campaign – Effects

Among participants who recall seeing the campaign, reported effects are mixed. While around one-quarter say it reduced their interest in owning focus pets, a larger share (40%) report increased interest. A substantial proportion also say they had no interest before seeing the campaign. Younger participants are significantly more likely to say that the campaign increased their desire to own focus pets.

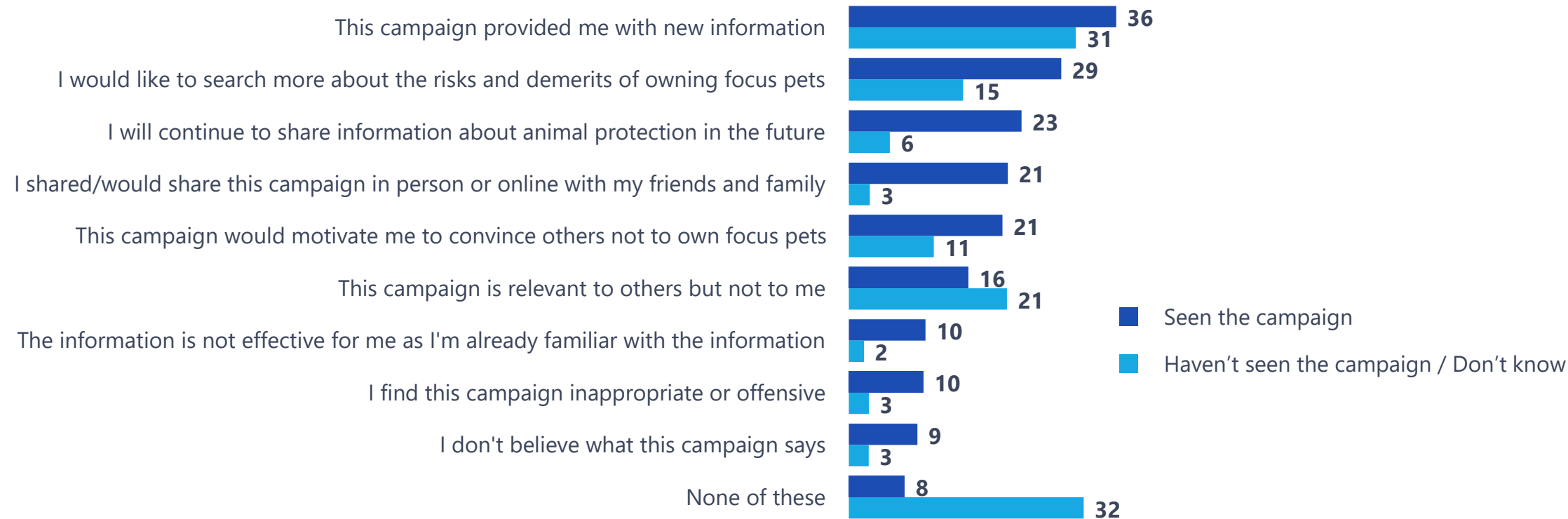
Effect of the Campaign on Participants (%)



Impression of the Campaign – Perceptions

Participants who reported having previously seen the campaign are more likely to say it provided new information, prompted interest in learning more about the risks of owning focus pets, and encouraged sharing or discussion with others. A low number reports disbelief or offence. Those who hadn't previously seen the campaign show a lack of engagement, with almost one-third saying that none of the statements apply to them.

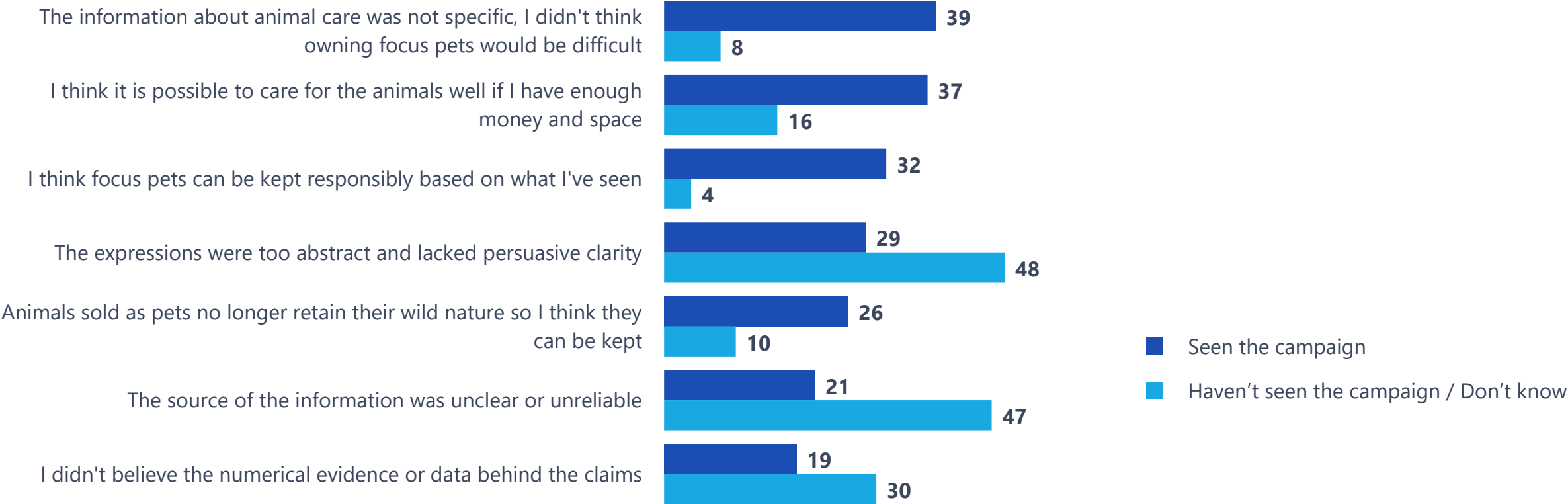
Perception of the Campaign (%)



Impression of the Campaign – Reason for Disbelief

Among those who don't believe the campaign, reasons vary, but show differences between those who had previously seen it and those who had not, though with small sample sizes. One notable difference is the perception that information about animal care was not specific enough.

Reasons for Disbelief in the Campaign, Those Who Do Not Believe the Campaign (%)



4. Appendices

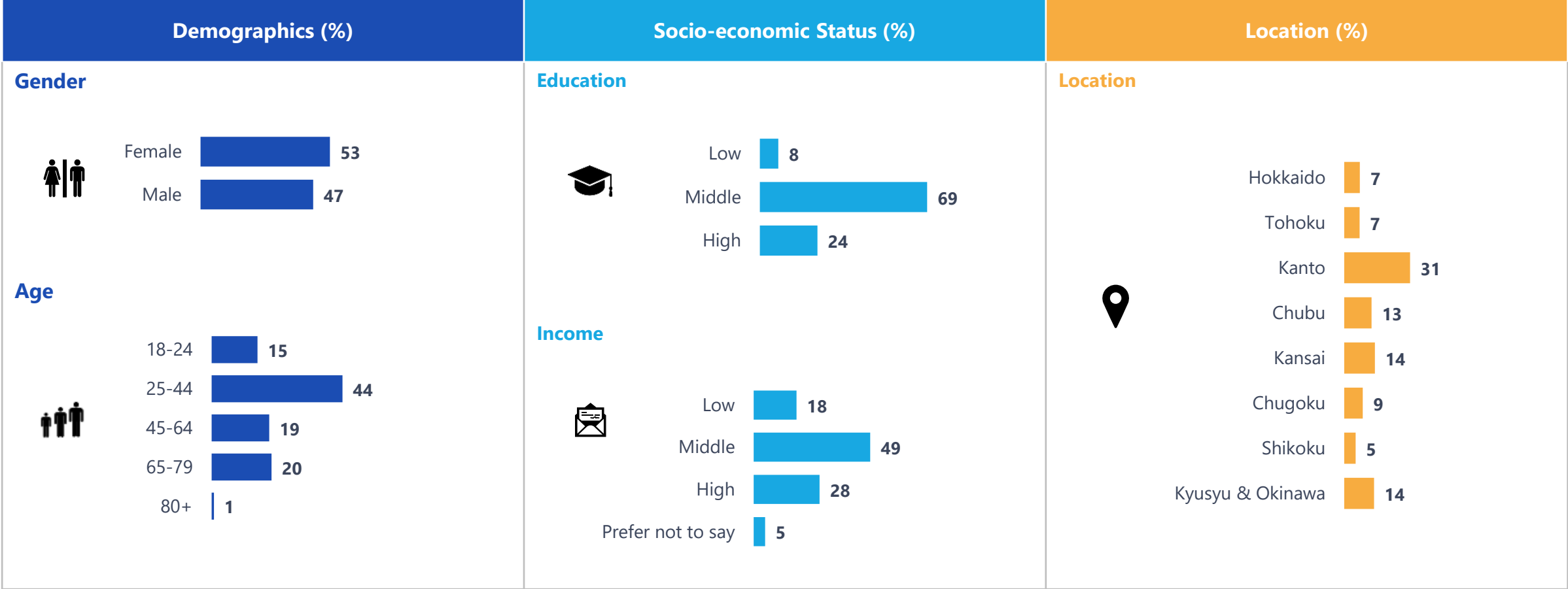


4.1 Breakdown of Sample



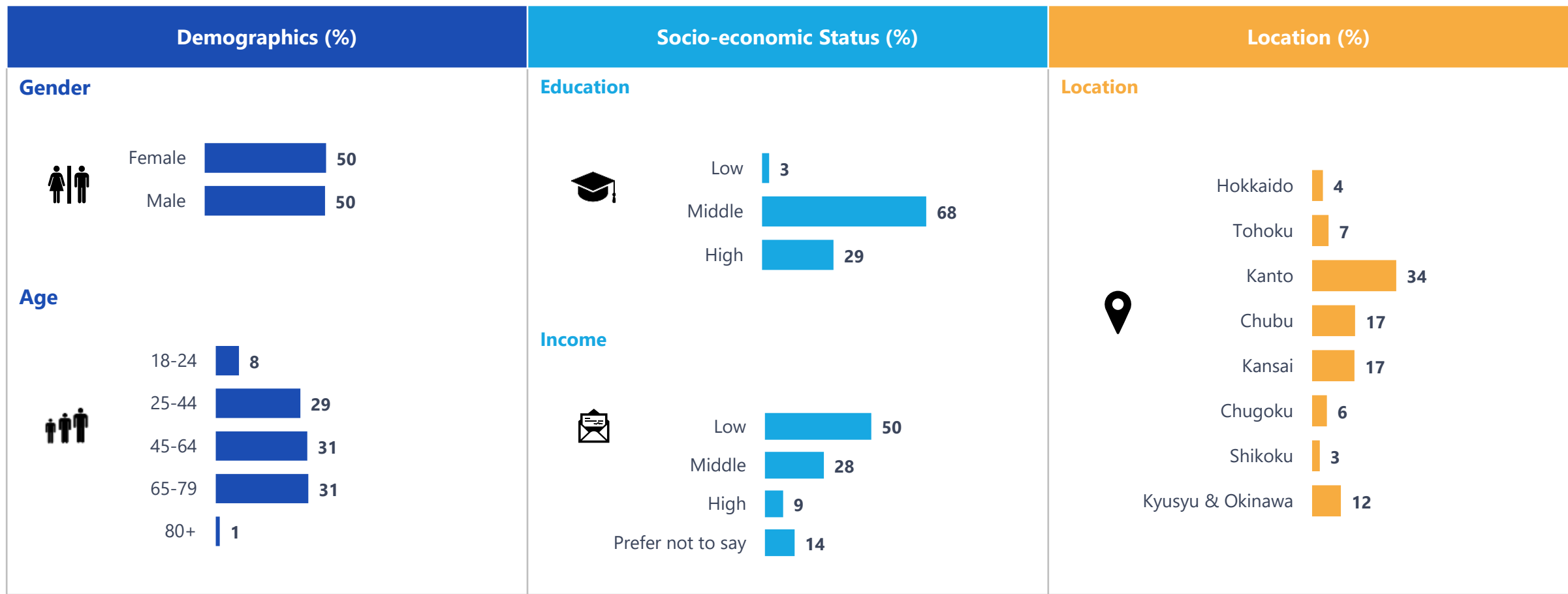
Breakdown of Sample

Total Sample Profile – Seen the Campaign



Breakdown of Sample

Total Sample Profile – Have Not Seen the Campaign / Don't Know





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