



BANFIELD® PET HOSPITAL

PAW PET-FRIENDLY WORKPLACE ROMETER™

APRIL 2017



Banfield
PET HOSPITAL



OVERVIEW

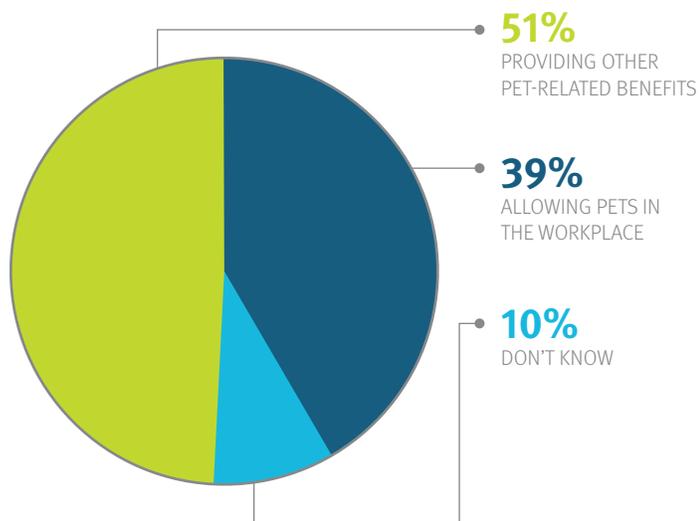
Banfield® Pet Hospital's second annual "Pet-Friendly Workplace PAWrometer™" (PAW = Pets at Work) surveyed 1,000 employees and 200 Human Resource decision makers from a mix of company sizes and industries across the U.S. in early 2017. The study explored the prevalence, impact and perceptions of pet-friendly workplaces and other pet-related policies tied to employees and company culture.

While opinions about policies permitting pets in the workplace remain highly favorable year over year, other pet-related benefits (e.g. general pet-related paid time off (PTO), pet bereavement for grieving a pet's death, and PTO to care for a new pet (pawternity leave)) proved even more popular with employees and potential hires. In addition to looking at other pet-related policies, the 2017 report

finds millennials (those employees between the age of 18-35) are particularly receptive to pet-friendly workplaces, with an overwhelming majority believing such environments positively impact employees and company culture. More than half of all millennials said they would be far more likely to stay at a company that allows pets in the office, and nearly half said they would like to see such policies implemented in their workplaces.

At Banfield, we know firsthand the important role pets play in our lives. We hope this research will continue to broaden the conversation and accelerate momentum around pet-friendly policies, expanding beyond allowing pets in the workplace to offering a wide array of pet-related benefits that are mindful of pets and their owners.

EMPLOYEES' CHOICE BETWEEN PET-RELATED BENEFITS AND PETS AT WORK



KEY FINDINGS

OTHER PET-RELATED BENEFITS MATTER MORE TO EMPLOYEES THAN PETS IN THE WORKPLACE

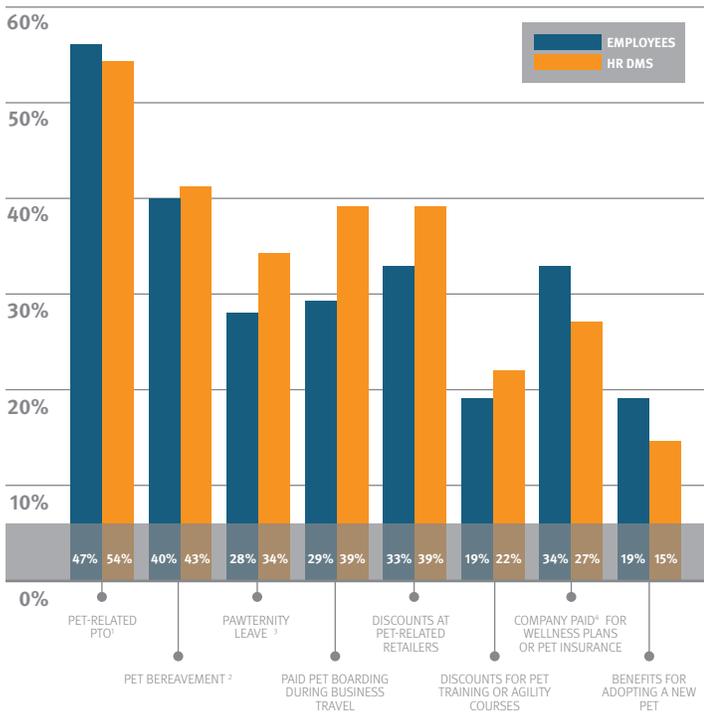
Benefits such as pet-related PTO, pet bereavement and pawternity leave proved popular among employees and HR decision makers. In fact, when asked to choose between these benefits and allowing pets in the workplace, most employees said they would prefer other pet-related benefits (51 percent) over allowing pets in the workplace (39 percent).

Offering pet-related benefits such as pet bereavement and PAWternity leave is also a major draw for recruitment, with 73 percent of employees saying they would be more likely to accept a job offer from a company with pet-related benefits other than allowing pets at work.

Of all pet-related benefits tested, pet-related PTO received the highest rating from both employees (47 percent) and HR decision makers (54 percent). Pet bereavement and PAWternity leave were ranked second and third in preference, respectively.

Overall, offering both pet-related benefits and permitting pets in the workplace have a positive impact on employees, according to more than two-thirds of both employees and HR decision makers. The top five areas in which HR decision makers note improvements as a result of implementing pet-friendly policies include 1) employee morale (93 percent), 2) reduced stress among employees (93 percent), 3) work-life balance (91 percent), 4) greater loyalty to the company (91 percent), and 5) reduced guilt among pet owners about leaving their pets at home (91 percent).

Among those companies that do not currently allow pets, at least two-thirds of HR decision makers agree improvements would be seen across all facets of the workplace if pets were allowed. In addition, half of employees at non-pet-friendly workplaces say they would be more likely to continue working at their companies if pets were allowed at their office, and more than a third (35 percent) consider being able to bring their pet to work an important factor when looking for a new job.



TOP 5 IMPROVEMENTS SEEN IN THE WORKPLACE

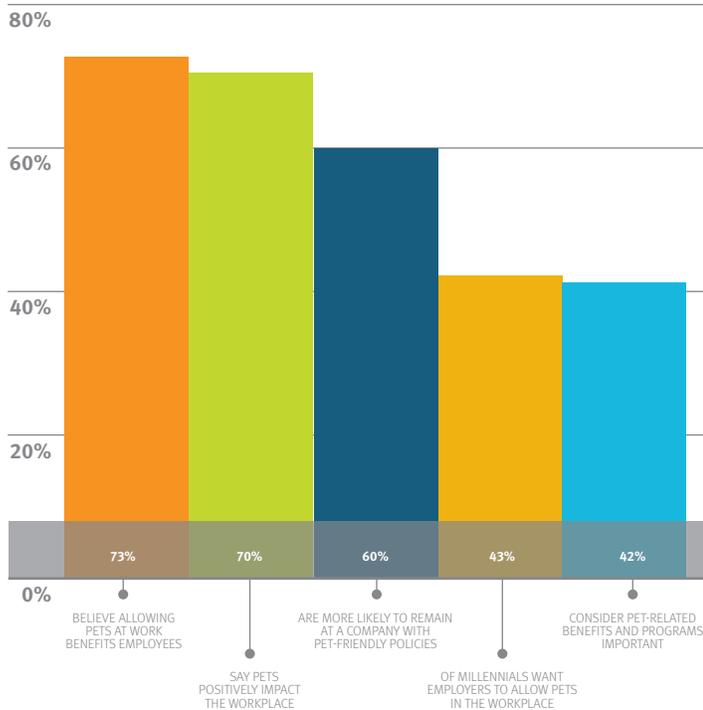


MILLENNIALS ARE THE MOST LIKELY TO ENGAGE IN AND ADVOCATE FOR PET-RELATED POLICIES

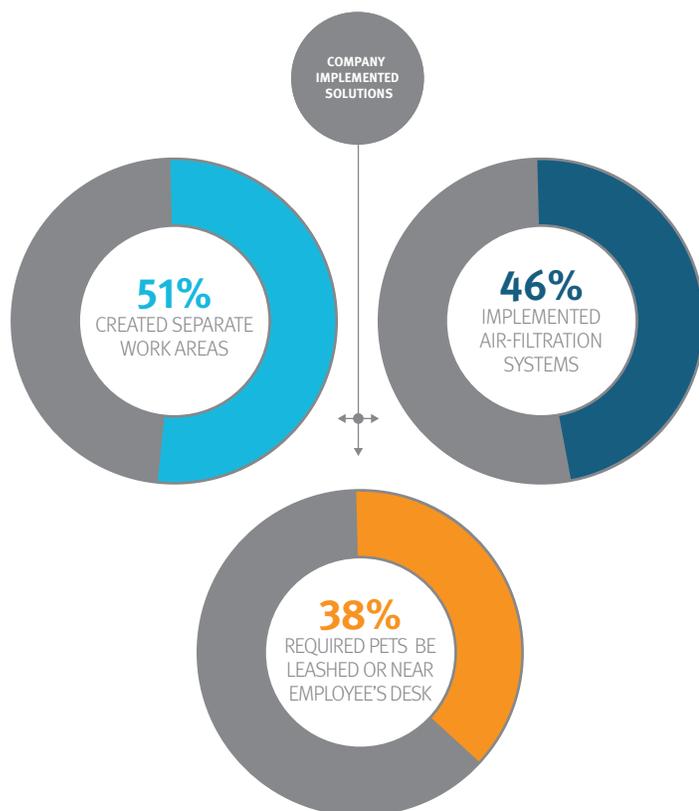
Millennials are significantly more likely to find value in the positive impact pets at work have on employees (73 percent) and the workplace (70 percent). Non-millennials are significantly less likely to share the same feelings, with 61 percent saying pets have a positive impact on employees—and even less (56 percent) on the workplace. Unsurprisingly given these results, 43 percent of millennials at non-pet-friendly

1. Specified number of paid time off days to be used for any pet-related needs
 2. Specified number of paid time off days to be used for grieving death of a pet
 3. Specified number of paid time off days to be used when getting a new pet
 4. Or off-set costs

PET-FRIENDLY WORKPLACES ARE IMPORTANT TO MILLENNIALS



14% OF HR DECISION MAKERS AND **11%** OF EMPLOYEES RATED PET-RELATED ALLERGIES AS A TOP CHALLENGE FOR PETS IN THE WORKPLACE



workplaces indicate their employers should allow pets in the office, while just 24 percent of non-millennials feel the same.

Pet-friendly policies are also more likely to influence a millennial's job search, with 42 percent considering such programs important, compared to only 23 percent of older adults. Millennials are also far more likely to continue employment at a company that implements pet-friendly policies (60 percent) in contrast to just 39 percent of non-millennials.

DESPITE OVERALL FAVORABILITY AND POSITIVE IMPACT OF PET-FRIENDLY POLICIES, EMPLOYERS STILL DEAL WITH CHALLENGES WITH PETS IN THE OFFICE

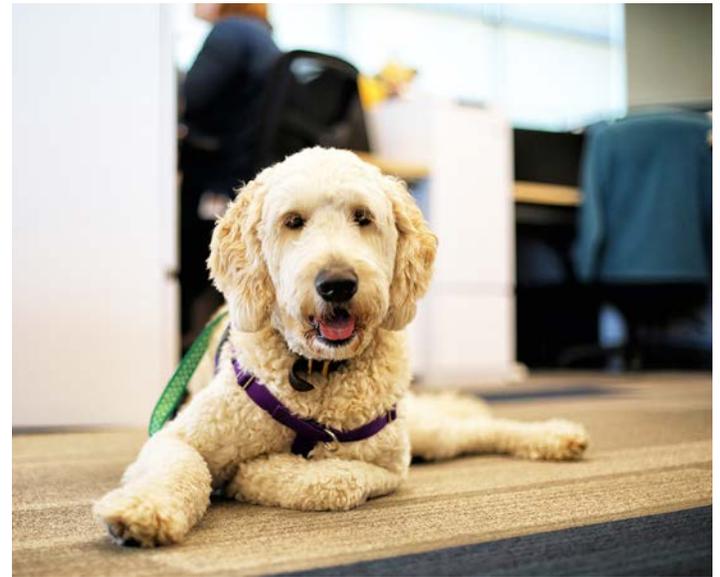
Two-thirds of HR decision makers (67 percent) say they always disclose pet-friendly office policies during the hiring process, so candidates are aware of potential allergies involved. As a result, more than one-third of HR decision makers (34 percent) say at least one potential employee has declined an offer due to concerns about pet allergies – this is relative to company size, with 17% of small companies (50 employees or less) and 50% among large companies (500 employees or more) saying they have had a potential employee decline an offer.

HR decision makers also stated the two biggest challenges of pets in the workplace are general distractions (29 percent) and pet-related allergies (14 percent). Employees also rated these challenges at 19 percent and 11 percent, respectively.

Of those who work for companies that allow pets in the workplace, 51 percent said their employers created separate work areas to protect employees with allergies, with 46 percent implementing air-filtration systems and 38 percent requiring pets to be kept on a leash or near employee's desk.

HR decision makers said their workplaces are most likely to implement keeping pets on a leash (34 percent), separate work areas (32 percent) and prohibiting pets from conference rooms during meetings (30 percent).

Despite allowing pets in the workplace, employees have varying opinions of what is appropriate in terms of weight-ranges for dogs in the office. More than half of employees (54 percent) and 42 percent of HR decision makers say dogs weighing less than 25 pounds are most appropriate for the office. Even fewer, 30 percent of employees and 20 percent of HR decision makers, feel all weights are appropriate. This indicates a variance in perceptions of what is considered acceptable when it comes to animal weights in the workplace.



ADDITIONAL FINDINGS

- **Three-fourths of HR decision makers** at pet-friendly workplaces proactively discuss pet-friendly policies when recruiting new employees. Another **61 percent** report potential candidates often inquire about pet-friendly policies during the interview process, regardless of whether it is mentioned proactively.
- **58 percent of HR decision makers** and **35 percent of employees** say their companies have formal, explicit and written policies about allowing pets in the workplaces. Conversely, **59 percent of employees** and **39 percent of HR decision makers** say they have informal policies, indicating a possible gap in how pet-friendly policies are communicated.
- **More than one-third of employees** and **approximately half of HR decision makers** at non-pet-friendly workplaces say they would get a pet or add another pet to their family if they are allowed to bring pets to work. Further, **more than six-in-ten among both audiences** believe people would adopt more pets if their company offered pet-friendly policies.

METHODOLOGY

The Banfield Pet-Friendly Workplace PAWrometer surveyed **1,000 employees** and **200 HR decision makers** from a mix of company sizes and industries across the U.S. between February 8 and 19, 2017. The survey was administered online, and all respondents were recruited from an online research panel and screened to ensure they meet the following criteria:

HR DECISION MAKERS:

U.S. adults age 18 or older who work in an office environment at least three days per week, have a director/vice president level or above job title, and are responsible for decisions on HR policy and benefits for their company.

EMPLOYEES:

U.S. adults age 18 or older that work in an office environment at least three days per week.

WITH QUESTIONS OR FOR MEDIA INQUIRIES, CONTACT:

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