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President
February 19, 2021***



The Business of Animal Protection



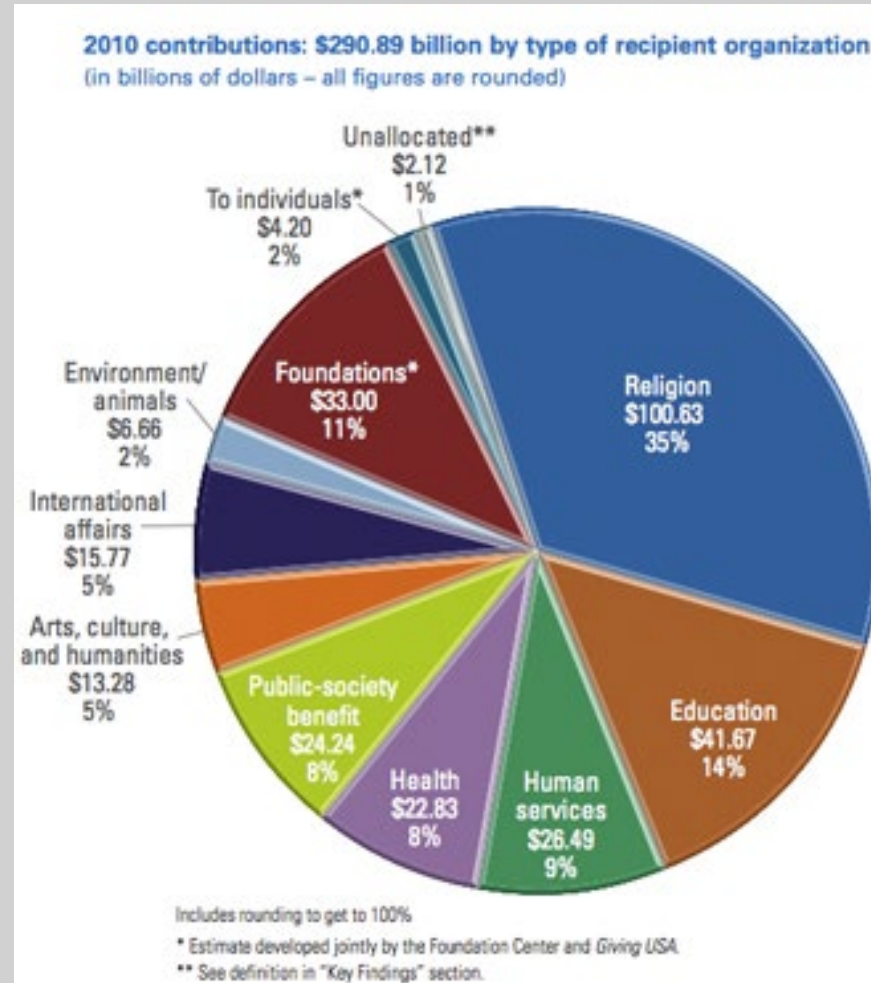
Outline of talk

- National Philanthropy
- Growing Numbers of Animal Protection Groups
- State based APO Income
- What is potential for AP Movement?
- State AP Growth
- Two Insights on US Dog Population and Covid

Philanthropy Breakdown by Sectors - 2010 Data

Environment & Animals \$6.66 billion (2.28%)

Of which \$1.6 billion is given to animal protection - \$5+ pcap.



National APO groups accounted for 25% of APO income.

HSUS \$137m
ASPCA \$117m
PETA/PCRM \$58m
Best Friends \$44m

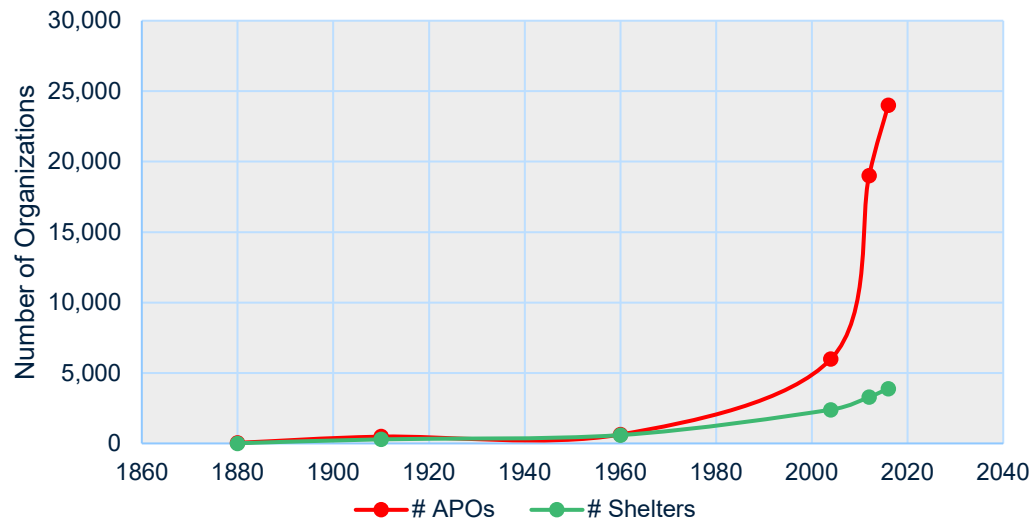
Dates of AP Organization Founding & Income

(as of 2006 from Natl Center for Charity Stats Data)

Ruling Date	# of NGOs	%	# Filing 990 (% filing)	Total Annual Inc. (\$mill.)*	Mean Inc. per org. (\$mill.)*
Before 1950	109	1.9	104 (95)	\$701.2	\$6.73
1950s	113	1.9	108 (96)	343.7	\$3.18
1960s	194	3.3	188 (97)	190.8	\$1.02
1970s	469	8.0	423 (90)	234.0	\$0.55
1980s	596	10.2	521 (79)	161.2	\$0.31
1990s	1,803	30.7	1,074 (60)	276.5	\$0.26
2000s	2,564	43.7	726 (28)	46.7	\$0.06
Unknown	18	0.3	17 (94)	7.4	
TOTAL	5,866	100	3,161 (54)	1,961.5	

Animal Protection Movement Growth

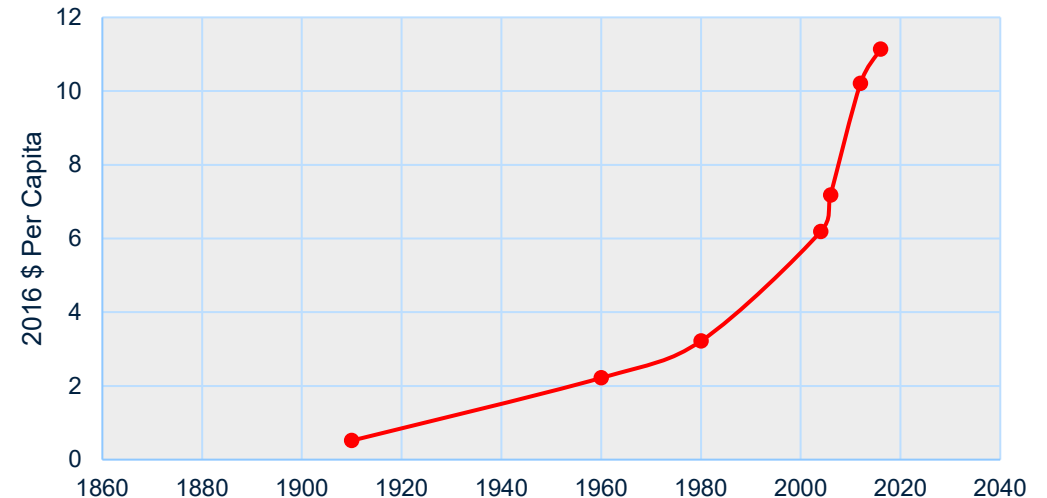
Number of US APOs and Shelters 1880-2016



Increase in # APOs in last 25 years, # shelters increased from about 600 in 1960 to 4,000 today.

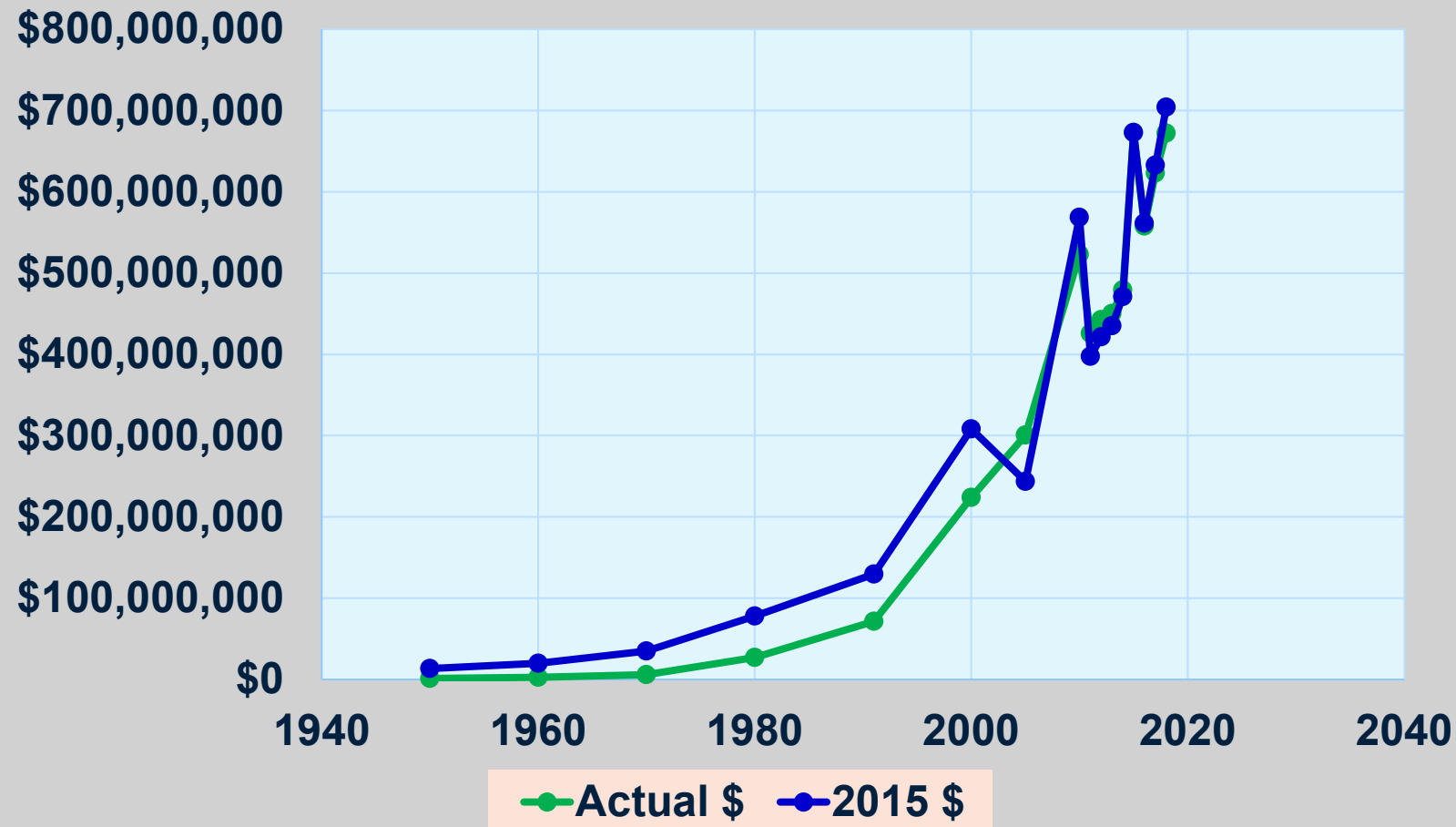
APO income taken off in this century – tripling in some states. (AC \$ not incl. – ca. \$1 bn/annum)

Income per Capita (\$2016)

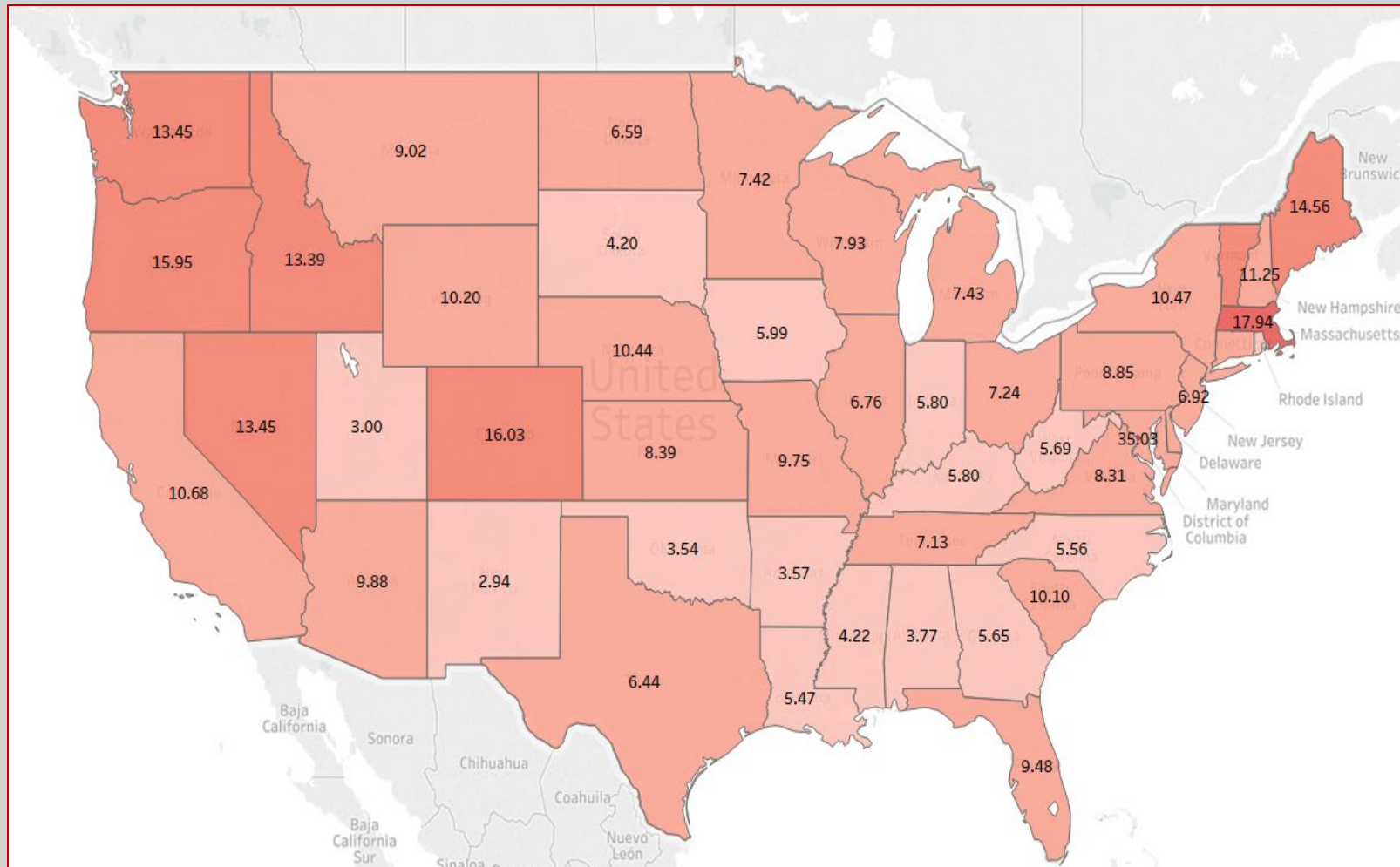


National and International APO Growth

National APO Group Income (US \$2015)



State APO Income Per Capita



2016 Per Capita Income for Selected States

State	Per Cap	State	Per Cap
Texas	\$6.44	Hawaii	\$16.95
Iowa	\$5.99	Colorado	\$16.03
Kentucky	\$5.80	Oregon	\$15.95
Indiana	\$5.80	Massachusetts	\$15.85
West Virginia	\$5.69	Maine	\$14.56
Georgia	\$5.65	Nevada	\$13.45
North Carolina	\$5.56	Washington	\$13.45
Louisiana	\$5.47	Idaho	\$13.39
Alaska	\$5.42	Vermont	\$12.07
Rhode Island	\$5.25	New Hampshire	\$11.25
Mississippi	\$4.22	New Mexico	\$11.12
South Dakota	\$4.20	California	\$10.68
Alabama	\$3.77	New York	\$10.47
Arkansas	\$3.57	Nebraska	\$10.44
Oklahoma	\$3.54	Wyoming	\$10.20
Utah	\$3.00	South Carolina	\$10.10

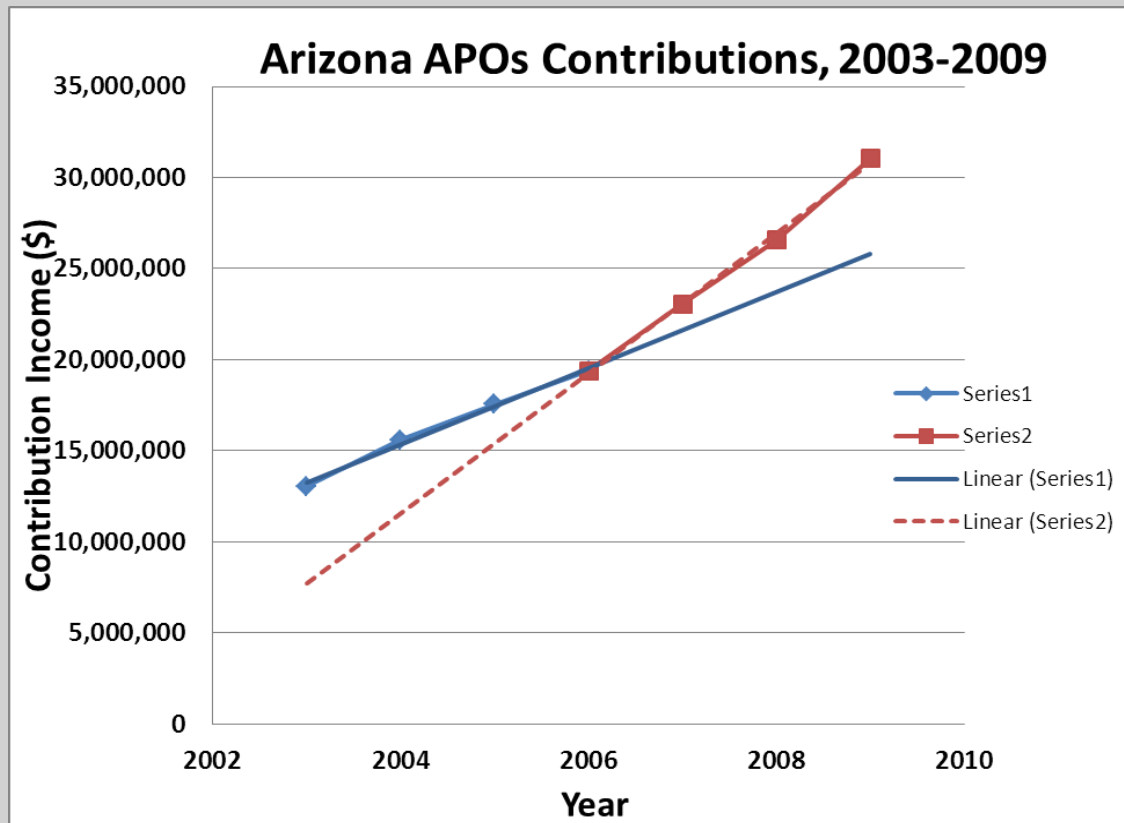
Per cap income ranges from a low of \$3 to a high of almost \$17.

No obvious patterns – RI low but VT & ME high. SC is twice NC.

As well as animal movement is doing, it could do better.

Two Anecdotes – Arizona Example

- 2006 Initiative Petition created a buzz in state for animal welfare – led to higher rate of increase for several years?

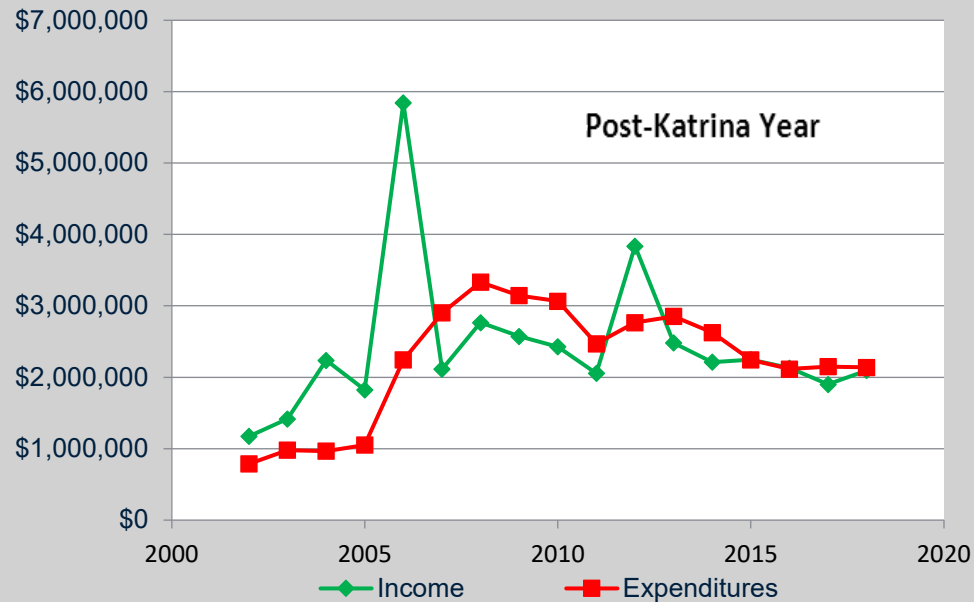


Year	Total Contributions
2003	13,063,991
2004	15,610,948
2005	17,566,621
2006	19,376,233
2007	23,052,952
2008	26,557,872
2009	31,030,783

Second Example

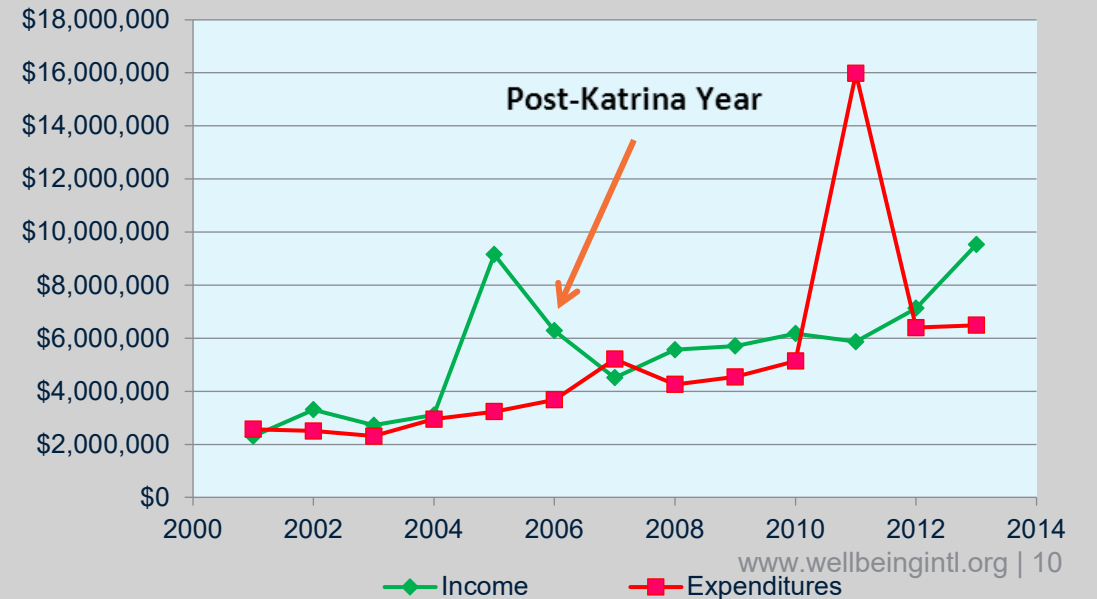
Gulf Coast APOs Pre- & Post-Katrina

HS of Southern Mississippi



HSSM was raising \$1m a year pre-Katrina and had Net Assets of \$2 million. Post-Katrina its annual income jumped to \$2.5 million a year and its Net Assets were around \$6 million in 2016.

Louisiana SPCA



LA SPCA was raising \$3m a year pre-Katrina and had Net Assets of \$3.5 million. Post-Katrina its annual income jumped to \$6+million a year and its Net Assets were \$27 million in 2014.

What is Animal Protection Movement Potential Income?

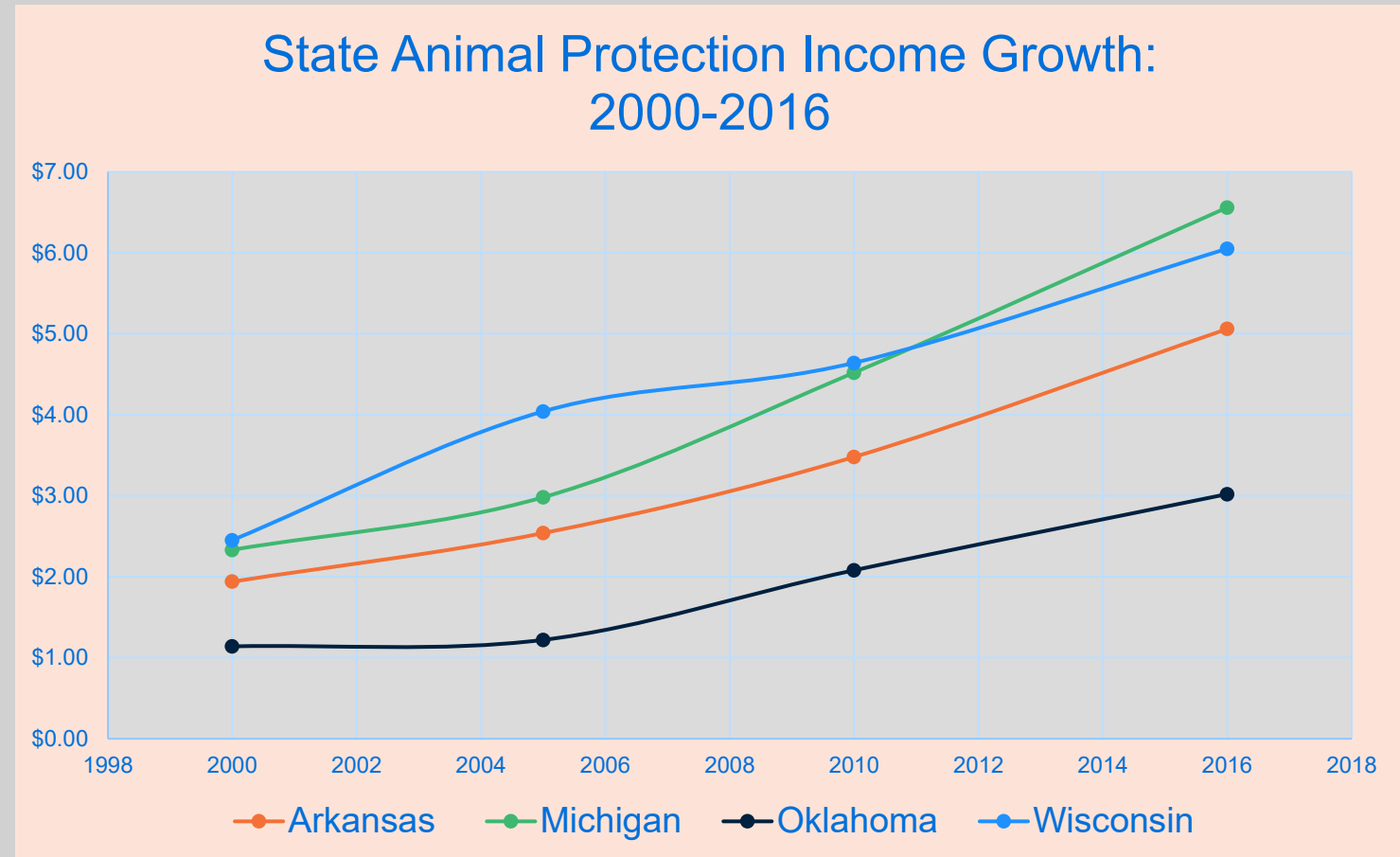
Using the following data:

- a) Total US philanthropy – around \$450 bn
- b) Major donors provide ca. 80% - \$360 bn
- c) APM (& Env mvmnt) do not do well among major donors
- d) APM raising its funds from the \$90bn “small” donor pool
- e) APM receives around \$9 per cap – 0.66% of total US philanthropy but about 3.3% of the \$90 billion

So, is 3.3% of 450bn (or \$15 bn) the potential for US APM income?

State APO Growth – Selected States

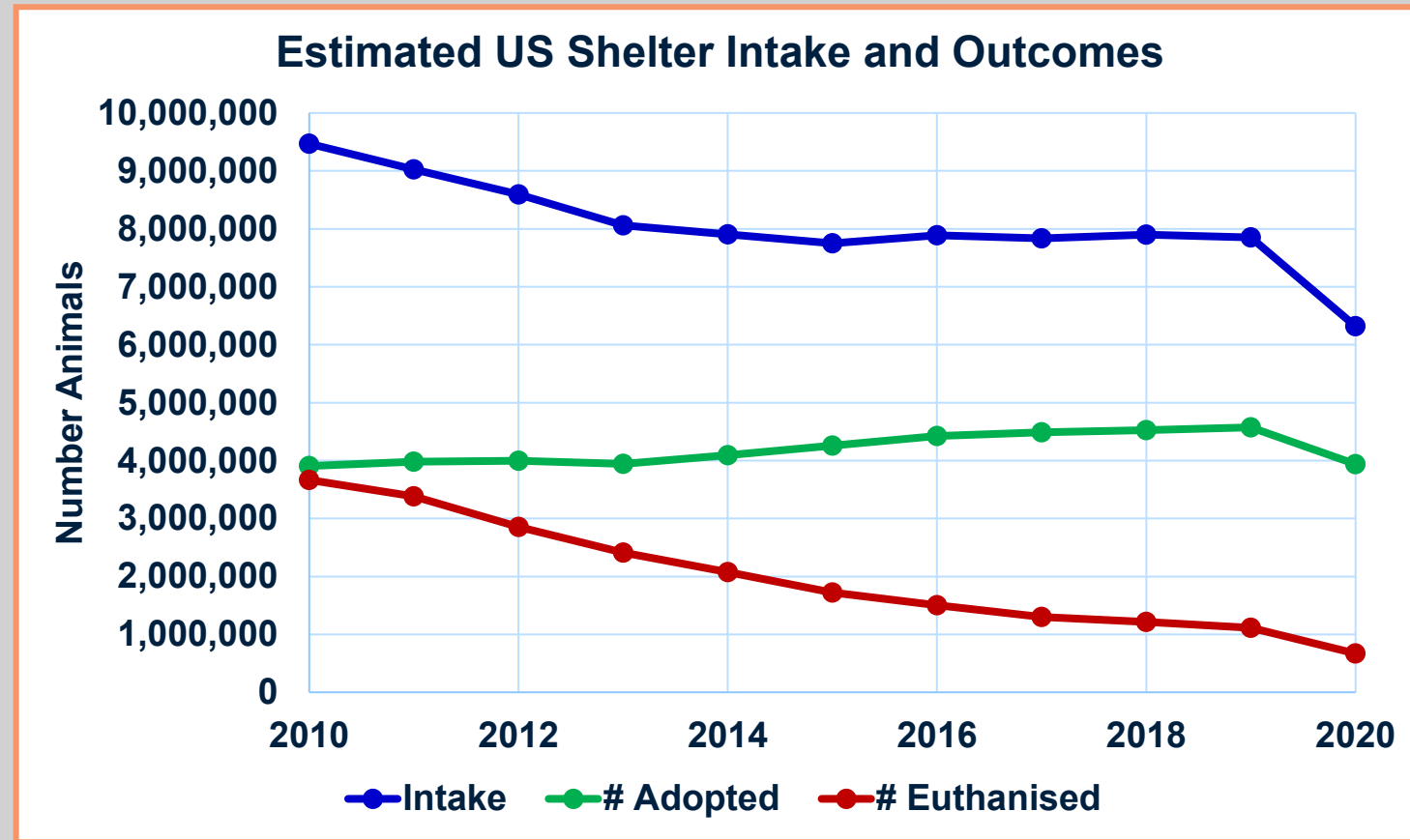
- And to show that growth extends beyond national organizations (who have gone from \$220 million to \$700 million from 2000 to 2016), here is a chart for APO income growth in four states.



Covid-19 Impact on Shelter Demographics

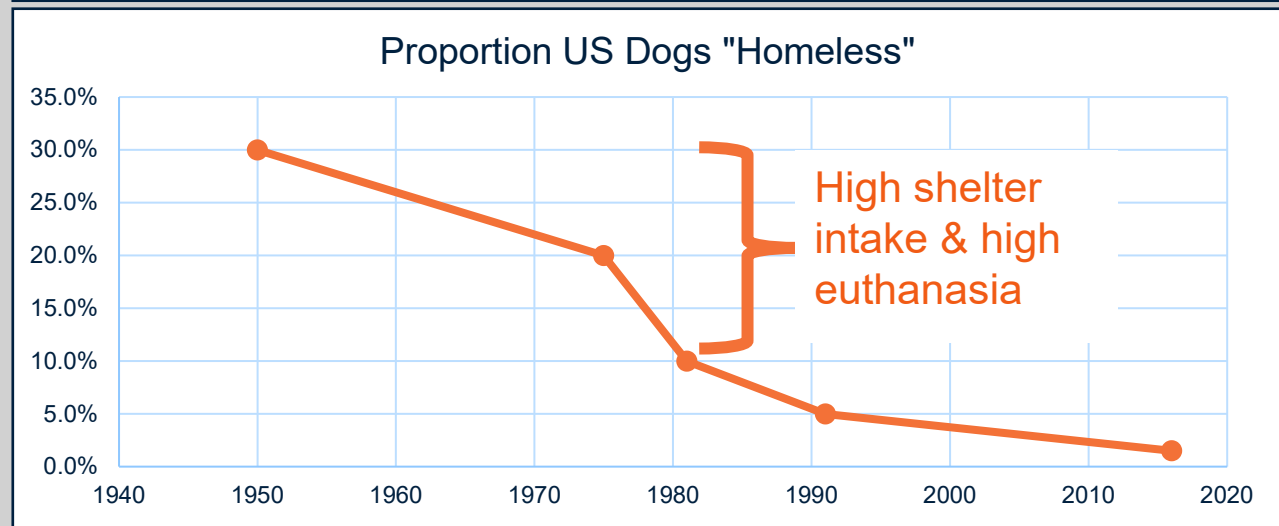
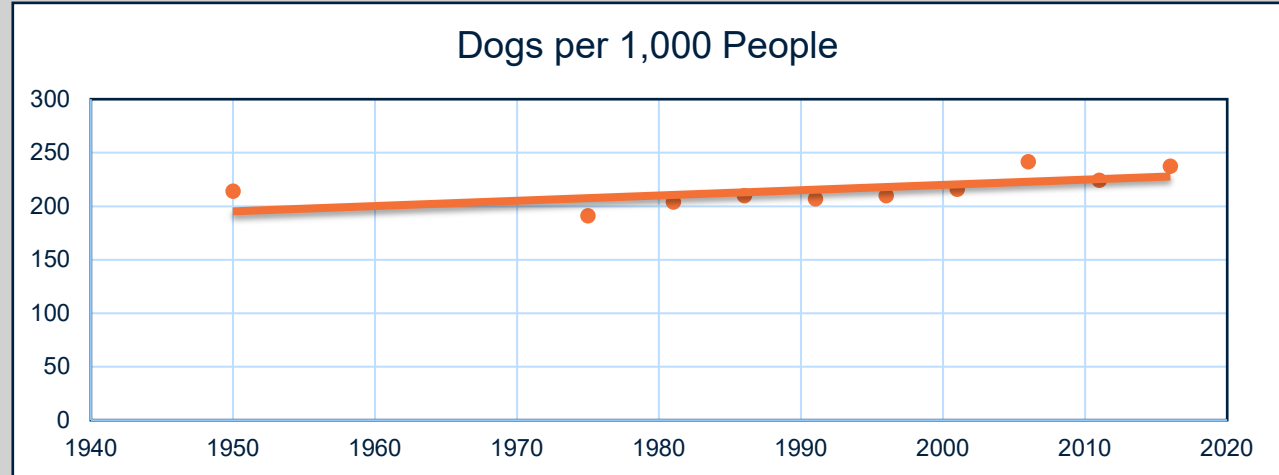
Shelter intake remained around the 2020 intake level in 2021.

However, shelters reported crowding in 2021



Changes in US Dog Population 1950-2016

- The “relative” number of dogs has stayed remarkable consistent (215-240 dogs per 1,000 people) for 70 years.
- But, the proportion of “homeless” strays has fallen from 30% in 1950 to 1.5% today.



WellBeing International

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