

Unleashing

AN ANALYSIS OF GLOBALIZATION CHALLENGES
AND RECOMMENDATIONS FOR FURTHER STRATEGIC EXPANSIONS
OF PET SERVICE PLATFORM, ROVER.COM

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THE DOG PEOPLE

"We're the dog people" is the tagline for Rover.com. Started in 2011, and named after man's best friend, Rover is a platform that brings dog owners together with dog services. Like Uber or Lyft, Rover is the middle man in coordinating a safe and secure transaction between strangers. To inspire trust Rover offers services like pet-sitter background checks, customer service, sitter reviews, sitter education, and coordinates a secure online transaction for both parties. In the past seven years since their launch they have expanded to offer their services in 14,000 cities in the United States. More recently they have launched in a handful of Canadian cities and in cities across the United Kingdom (UK). According to a May 2018 press release, they will continue to expand in Europe¹.

**Rover is expanding the reach of its service platform—
What are the globalization challenges that they will need to address
to become a global company?**

THE KIBBLE AND BITS OF INTERNATIONALIZED CODE

The ability to launch any new technology in a global market starts with a technical assessment of the underlying code of the product. If code is originally written with internationalization in mind, then the technical work of adding new languages, new currencies, new date and number formats are all greatly reduced. Writing code using UTF-8 character encoding allows displaying text in languages used around the world, spanning from French to Japanese to Arabic. However, some start-up companies whose early plans focus on building a viable business, miss the opportunity to build their services with a foundation of internationalized code. So, where might the maturing start-up, Rover, be with regards to technical readiness?

One clue of technical readiness is the company's choice of URL or internet address of the newly launched pages for Canadian and UK customers. New pages are all organized as subsets of the US domain, <https://www.rover.com/ca/> and <https://www.rover.com/uk/>. This choice keeps all the pages served and managed under their current US infrastructure. While customers might not explicitly notice this detail, having a website or app that does not have the correct country

¹ Rover's May 2108 European press release: <https://www.rover.com/blog/press-release/rover-com-announces-expansion-into-europe/>

code in the top-level domain name where the business is conducted, will likely limit exposure in search engines whose algorithms may prioritize local country domain names over US domains. In making this choice, the Rover team likely created a future project that will involve migrating pages and content into a new domain name and re-building search engine ranking from scratch.

This country-agnostic approach continues when we review the navigation of the main Rover site. Canadian cities are searchable from the US site and are listed alphabetically alongside US cities. In this list, the two-letter abbreviation for the Canadian Province is seemingly the equivalent of the abbreviation for a US state. This North American, city-focused approach obscures and diminishes the fact that Canada is a separate country. This is an offensive approach and should be changed to group by country, then list cities alphabetically.

Albuquerque, NM	Calgary, AB	Fort Myers, FL	Knoxville, TN	Oklahoma City, OK	Sarasota, FL
Alexandria, VA	Cary, NC	Fresno, CA	Lexington, KY	Omaha, NE	Spring, TX
Ann Arbor, MI	Chandler, AZ	Gilbert, AZ	Littleton, CO	Ottawa, ON	St. Petersburg, FL
Arlington, TX	Charleston, SC	Grand Rapids, MI	Long Beach, CA	Pasadena, CA	Tacoma, WA
Arlington, VA	Colorado Springs, CO	Greenville, SC	Louisville, KY	Pittsburgh, PA	Tempe, AZ
Aurora, CO	Columbia, SC	Henderson, NV	Marietta, GA	Plano, TX	Toronto, ON
Bellevue, WA	Detroit, MI	Honolulu, HI	Memphis, TN	Raleigh, NC	Vancouver, BC
Boca Raton, FL	Durham, NC	Huntington Beach, CA	Mesa, AZ	Rochester, NY	Vancouver, WA
Boise, ID	Everett, WA	Irvine, CA	Montreal, QC	St. Paul, MN	Virginia Beach, VA
Boulder, CO	Fairfax, VA	Jersey City, NJ	Nashville, TN	Santa Clarita, CA	West Palm Beach, FL
Brooklyn, NY	Fort Lauderdale, FL	Katy, TX	New Orleans, LA	Santa Monica, CA	Winnipeg, MB

Fig 1

Since the Canadian dollar(CAD) uses the same currency symbol “\$” as the US dollar (USD), a customer may be unclear which currency the Canadian city prices are listed in. An email to Rover’s Customer Service clarifies that prices for the Canadian cities are in Canadian dollars (CAD). Adding the currency code below the ambiguous dollar symbol, would clarify this for future customers.

The UK site lists dog sitter’s rates in British Pounds as denoted by the “£” symbol. Unfortunately, on the UK site, the price refinement to narrow search results by price, is still using US (or Canadian?) dollars and therefore would not give you correct search results due to the differences in exchange rate.

Fig 2

Other currency details, like icons that represent monetary transactions, continue to use the “\$” symbol and would need to be redesigned to use either a universal currency icon or be customized and programed to display per locale.

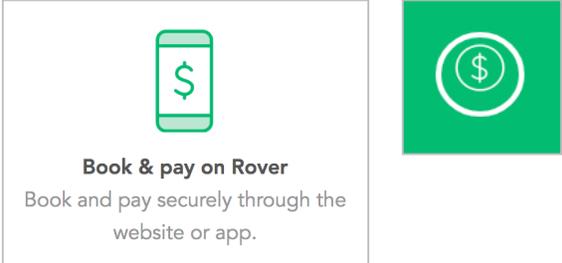


Fig 3

Coordinating the days of a dog boarding booking is a critical functionality of the service, so it is concerning that both the Canadian and UK site continue to rely on the US convention for date formatting instead of leveraging a date API and localizing to a locale specific standard². Dates must be displayed as needed by the customers using them.

US:	UK:	CA:
(MM, DD, YYYY), e.g. 08/22/2018.	(DD, MM, YYYY) e.g. 22.08.2018	(YYYY—MM-DD) e.g 2018-08-22 ³ .

In the examples below, the date could be misinterpreted to arrange a 2-month boarding of a pet, instead of the intended 2-days. While it is possible that it would be obvious by the price calculated for the stay or further correspondence sent between dog-owner and sitter articulating the date in an unambiguous format is a must-have requirement for all customers.

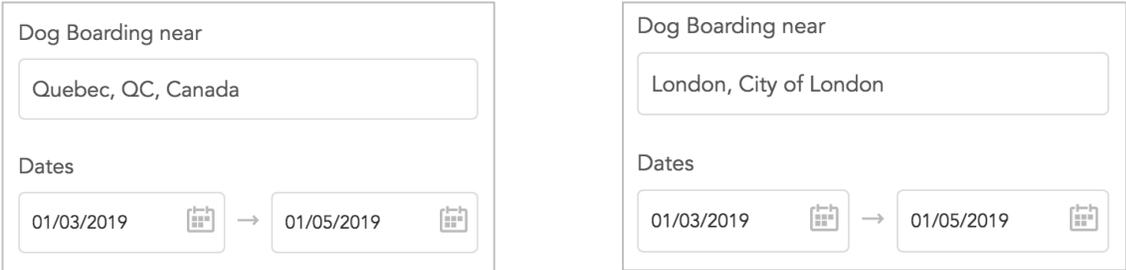


Fig 4

The final concerning decision that reflects Rover’s lack of readiness to serve global customers is its lack of French language support for its Canadian cities. While laws vary depending on the Canadian province, French is the official language in Quebec and it is common practice for

² Globalization best practices: <https://docs.microsoft.com/en-us/globalization/locale/date-formatting>
³ Standards Council of Canada, recommends to follow the International Organization for Standardization (ISO) standard # 8601. *Getting on the Same Page when it Comes to Data and Time*, 2011. (<https://www.scc.ca/en/news-events/news/2018/getting-same-page-when-it-comes-date-and-time>)

physical and digital products sold in Canada to support dual language instruction in both English and French⁴. The business decision to introduce a service in Canada without supporting French is both legally and culturally risky. French Canadians are passionate, proud, and assertive when it comes to their linguistic heritage and this cultural miss-step could elicit negative customer responses and limit future growth.

How much language differences affect communication between the dog-clients and their sitters, we may never know-- but likely there will be many Québécois who prefer communicating with French speaking Marie-Claude, whose sitter profile was written in French.



Fig 5

As we see, Rover did less than the minimum in terms of customer facing localization to launch its Canadian and UK versions of Rover. Decisions to re-use images of western-looking people in western style settings will probably go unnoticed due to the similarities of the people and cultures, but as they expand their reach, investing in locale specific images, unique pet-services, locale specific payment options and adjusting design choices can enhance their brand with authenticity and a sense of community that would be appropriate for its service offering.

ROVER'S CULTURAL MARKINGS

Technical details of the Rover user experience have quickly led us to issues of culture. For US customers, what makes Rover's service so successful? What are the cultural values it taps into to make its service relevant? One clue can be seen in Rover's logo. It is a dog's paw-print-signature designed with an upside-down heart.

A heart icon even denotes the path to "Become a Sitter". A not-so-subtle hint that Rover's success is powered by a love connection.



Fig 6

⁴ Overview of Quebec Language requirements. (<https://www.educaloi.qc.ca/en/capsules/language-laws-and-doing-business-quebec>)

What Rovers has identified and built its business on is the cultural trend to extend the family values of love, loyalty and responsibility to the non-human members of their family. Images on Rovers site illustrate these close and loving relationships. People are shown crouched down next to dogs—at their level. Dogs sit in people’s laps, like babies. Dogs and people exchange loving ‘kisses’. These portraits illustrate the close physical and familial relationships people have with their dogs. Gone is the hierarchical power dynamic relationship of owner and owned—replaced with family portraits of people and animals.



Fig 7

A testimonial used on both the US and UK version of the website shows a woman and her two dogs (Fig 8) —She holds them up off the ground and carries them close to her body. She praises her dog walker, who cared for her dog “as if she were her own”. In this case, her own does not refer to ownership, but rather to belonging within *her* own family.

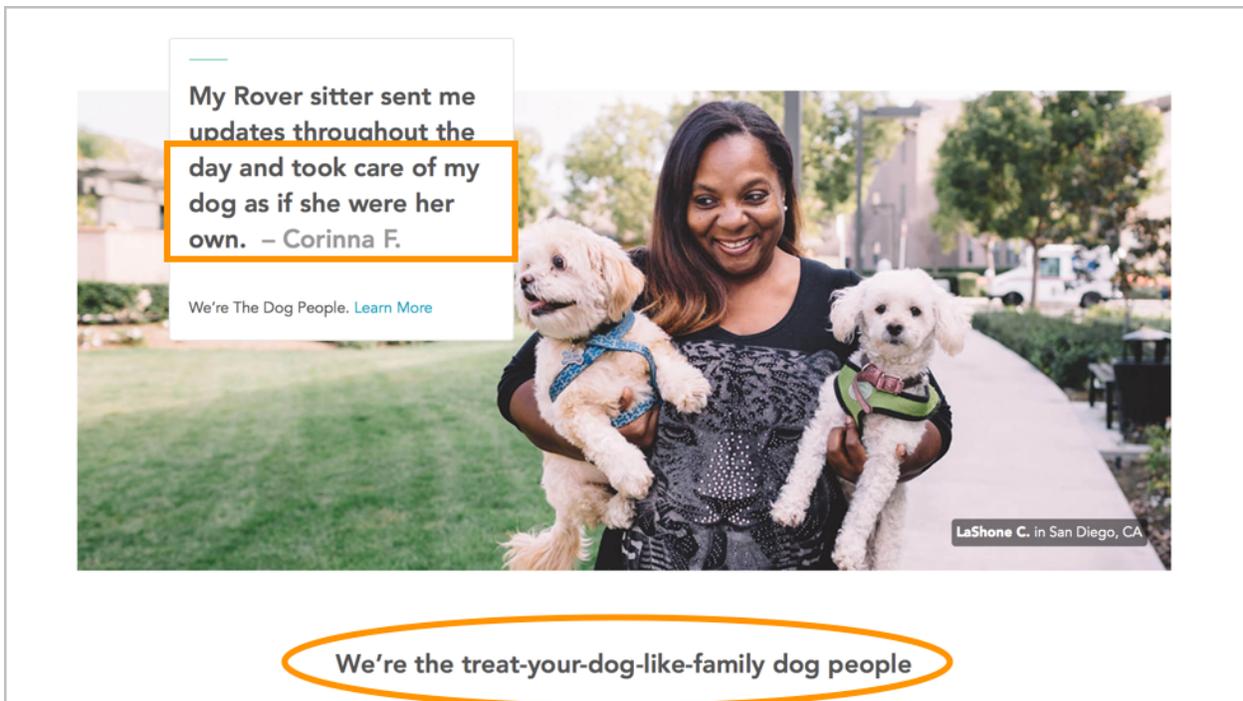


Fig 8

If there was any doubt what values Rover is mirroring, they tell us: “*We’re the treat-your-dog-like-family people*”. With this in mind, when Rover is looking to expand its product into a global

arena, it needs to find cultures which share these same values of treating your pet like a family member.

If we look at examples of advertisements from European countries, we see evidence that pet owners do share this attitude of seeing their pets as family. Beaphar, a pet pharmaceutical company based in the Netherlands, markets products for cats, dogs, rabbit, and birds with the tag line: “Because Pets are family too” (Fig 9). Ads like these indicate that Rover would be wise to research if its European services should promote being Dog-People or being Pet-People to effectively meet the perspective of its customers.



Fig 9. English version of ad that ran in Belgium in 2017

An advertisement on Spain’s Pedigree dogfood website, jokes that this cute dog needs a kiss because it is sitting under the mistletoe.

Since Rover services are city-specific Rover should consider that certain cities and areas within Spain speak Catalan as their primary language. Making a miss-step like was done in Quebec and other Canadian Provinces, would be a clear signal to Catalan cities, like Barcelona, that this is an American company peddling an inauthentic service.



Fig 10. Spanish Pedigree ad.

(NOT) EVERYONE LOVES DOGS

Cultural and religious attitudes towards dogs are unique around the world and understanding those attitudes are key to articulating the global strategy for any product. An advertisement used in Germany for Pedigree dog food is a good example of how what works in one market, has the opposite effect in another.

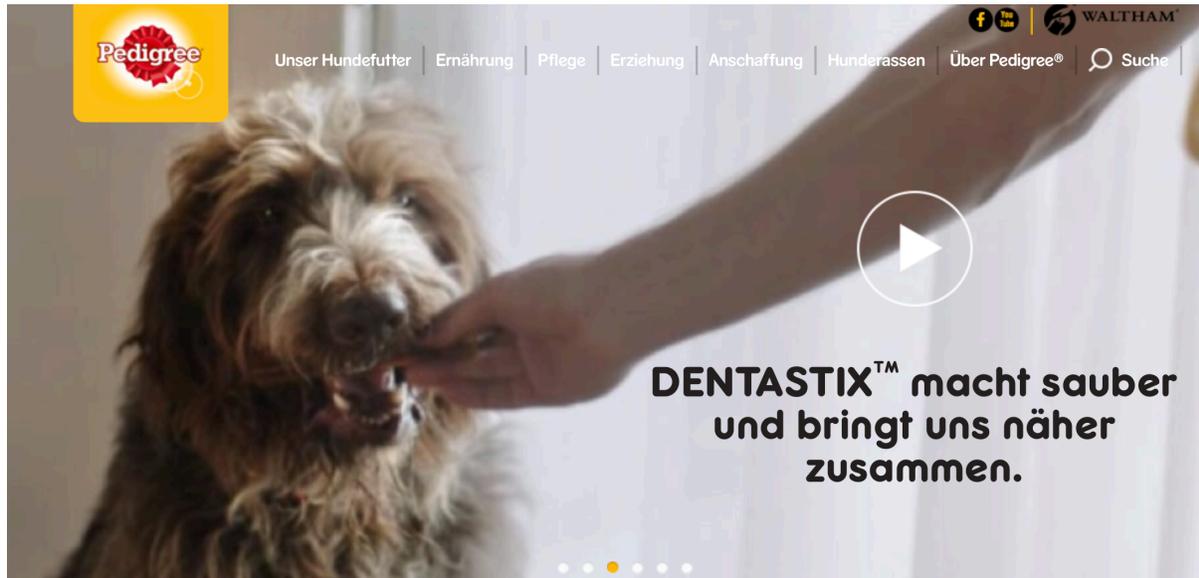


Fig 11. German Pedigree ad.

This image promotes a teeth-cleaning bone and shows the owner's hand nearly inside the pet's mouth and likely in contact with the dog's saliva. In Germany, this illustrates a caring owner attending to the good health of a beloved pet. For Muslims around the world, this illustrates the exact reason you would not want a dog. In Islamic teachings, kindness to animals is encouraged but dogs are thought to be unclean. A hadith (a moral teaching), from the prophet Muhammed discusses dog saliva in particular as being unclean⁵. And as anyone who has owned a dog can tell you, dealing with dog drool and other gross stuff are part of caring for your dog. Religious based stigmas, such as this, often become broader cultural dispositions which perpetuate the status quo. Rover's dog services would likely not be popular in countries where Islamic beliefs heavily influence social interactions.

⁵ Azizah Magazine, Pets and Muslims, by Ruth Nasrullah. Archived at The Humane Society. <https://www.humanesociety.org/sites/default/files/docs/pets-and-muslims-factsheet.pdf>

FINDING 'THE SPOT'

To identify expansion opportunities, Rover must look for cultures that embrace pets as family members and ones that have a growing or emerging economy. The US Bureau of Labor Statistics tell us that between 2013 and 2015 American households increased annual spending on their pets each year. In 2015, the annual average pet-spend was \$528⁶. When a country's economy is growing, pet owners will have some measure of expendable income to seek pet services. Growth in the pet industry is also seen in the world's emerging markets of India and Brazil. In the Euromonitor's 2018 marketing report, *Pet Care in India*, the rise of the pet-related business opportunities is illustrated by multi-national Nestlé (The Purina Brand) entering the Indian dry dog food business. The report also articulates the increased role of affection and compassion in Indian's attitudes towards pets:

*"Indian people are increasingly attached to their pets with animals such as dogs, cats and birds often regarded as part of the family. People became more aware of the hardships some animals suffer, motivating many animal lovers to adopt stray cats or dogs as pets in India."*⁷

Details on pet-types (beyond dogs) and the adoption trends may be interesting details that Rover can explore and build into its product if introduced in the Indian market. Supporting multiple languages and a range of transaction options would be a must-have to be successful in India. The article, *Here is why urban India is bringing pets home faster than ever before* (Hindustan Times, 2016),⁸ tells us of multiple new pet-focussed businesses popping up in India—from grooming and training to pet clothing. All of these fueled by a growing economy and the cultural shift of 'pets as family members'.

⁶ Bureau of Labor Statistics, Households spent an average of \$528 on pets in 2015., April, 2017.

[HTTPS://WWW.BLS.GOV/OPUB/TED/2017/HOUSEHOLDS-SPENT-AN-AVERAGE-OF-528-DOLLARS-ON-PETS-IN-2015.HTM](https://www.bls.gov/opub/ted/2017/households-spent-an-average-of-528-dollars-on-pets-in-2015.htm)

⁷ Euromonitor International survey, Pet Care in India. May 2018.

⁸ Hindustan Times, Here is why urban India is bringing pets home faster than ever before, 2016

https://www.google.com/amp/s/m.hindustantimes.com/fashion-and-trends/animal-instinct-here-is-why-urban-india-is-bringing-pets-home-faster-than-ever-before/story-vPwK5yRIOPH98EGRBlvNzM_amp.html

In an article that appeared in The Atlantic magazine, *The Dog Economy Is Global—but What Is the World's True Canine Capital?* authors Theresa Bradley and Ritchie King discuss Brazil's economic growth in parallel to the growing number of small dog owners:

“Members of Brazil's rapidly urbanizing middle class are working more, earning more, and having kids later. And to fill their tiny apartments in the meantime, they're buying more and more dogs as pets. Brazilians, in fact, have nearly 20 million small dogs at home--more per capita than any country in the world.”⁹

Again, we see evidence of our key success markers of dog affection+ growing economy, but we also learn unique details about pet-ownership in Brazil. The prevalence of small-sized dog ownership may mean a dog-walkers earns more money because they are able to manage more pets during a single walk? Or, it could mean differences in dog needs—perhaps the dog is accustomed to being carrier on the walk? These potential market-specific details could turn into locale specific site options that would make Rover's service even more relevant for Brazilian customers because it correctly reflects its specific dog culture.

Here are some examples of Pet Advertisements from Brazil:¹⁰



Fig 12. “Happy Mother’s Day” message from Special Dog, Dog Foods

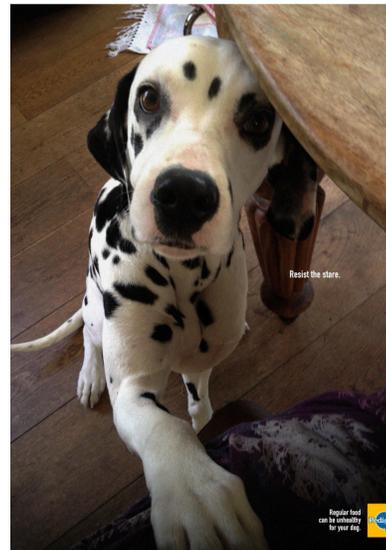


Fig 13. “Resist the Stare” from Pedigree.

⁹ The Atlantic. The Dog Economy Is Global—but What Is the World's True Canine Capital? Theresa Bradley and Ritchie King, 2012 <https://www.theatlantic.com/business/archive/2012/11/the-dog-economy-is-global-but-what-is-the-worlds-true-canine-capital/265155/>

¹⁰ Source: <https://www.adsoftheworld.com>



Fig 14. “There’s a better way to honor your buddy”, promotion for dog-adoption.



Fig 15. “All clean” from Pet Moist wipes.

One consideration for launching services in Brazil is its use of the Boleto bancário, which is a popular payment system in Brazil similar to a wire transfer and one that can be used by unbanked individuals¹¹. Integrating with this system is not a trivial technical investment however payment options are evolving in many marketplaces and investing in building a nimble transaction and payment system that works for any marketplace could give Rover a technological advantage over competitors and meet customer’s evolving payment preferences.

Lastly, Rover should consider a local expansion on its US site to better meet the needs of the US Latino community. According to Packagedfacts.com, the number of Hispanic pet owners is increasing dramatically¹² Providing a dual language experience for the website and a two-way translation option for communication between pet-owners and pet-sitters with different language preferences could bring even more customers to its platform. Language diversity in cities can work to separate communities and having a platform that can be the communication intermediary will build connections and bring people together. Plus, once you are supporting dual languages in the US, you can leverage the investments in things like Spanish speaking customer service, images, base translations and launch in cities like Buenos Aires, Mexico City or Santiago with diminished localization effort.

¹¹ Brazilian payment system: <https://www.pagbrasil.com/payment-methods/boleto-bancario/>

¹² Packagedfacts.com. Hispanics as Pet Market Consumers. By George Puro. 2016.

<https://www.packagedfacts.com/Content/Blog/2017/01/03/Hispanic-pet-owners-chart-a-different-course>

Technically, Rover offers cat sitting services too. It is just not really promoted on the US, CA or UK sites. While cats don't need as much walking (or do they?), they still need love and affection. With this in mind, an additional global expansion for consideration is to launch the same technology under a different brand. In Japan, cats are much more popular than dogs. The intense emotional relationship that Japanese cat owners have with their pets is well illustrated in this heart-wrenching commercial for cat-liter¹³.



Fig 16. Screen grab from emotional cat-liter video.

Full video: https://www.adsoftheworld.com/media/film/kao_nyantomo_letters_from_my_cat

Once the Rover code is internationalized, there is no reason the Japan version of the site could not be called: 猫座 or 'cat sit'. The service would be a reverse of the US approach which obsesses over dogs, but also offers the cat services – to allow the Japanese to obsess over cats while still giving a nod to dog-owners.

Even though Rover insists “*we’re the Dog People*”, what Rover is *really* all about is bringing strangers together to transact and in a growing global gig-economy. With that in mind, **expanding uses for Rover’s technology platform might be the real global expansion strategy.** The gig economy has many more business iterations that have yet to be explored-- Hire someone to water your plants, weed your garden, clean your house, buy your holiday gifts.... and the list goes. Once Rover the platform is internationalized, customizing language, currency, text, images and even the core product being sold can be more easily localized.

¹³ Letters from my Cat, Nyantomo Cat-liter.

https://www.adsoftheworld.com/media/film/kao_nyantomo_letters_from_my_cat