



**CAMP  
BOW WOW**<sup>®</sup>  
DOGGY DAY CARE & BOARDING

**2019**  
EXECUTIVE SUMMARY

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## WHO IS CAMP BOW WOW®?

### A disruptor model in the dog kennel business

A pet franchise that leads the way in a high-growth industry.

Dogs visited Camp Bow Wow® more than 4 million times in 2018, and our swiftly growing company has upended the traditional canine kennel model by creating a unique experience for dogs. We're not a kennel, we're a Day and Overnight Camp concept that dogs — and their owners — truly love. We are a day care, boarding and grooming franchise with over 165 units in the U.S. and Canada that generated more than \$125 million in revenue in 2018.\* While the \$70+ billion pet care industry is growing at a robust 7% annual rate per IBISWorld\*\*, our company has 12% year-over-year growth.\*\*\* We're looking for more passionate dog

\* Figure represents the aggregate Gross Revenue for all locations that were open and operating in 2018, including those owned by the Franchisor, as reported in Item 19 of our 2019 Franchise Disclosure Document. The financial performance representation contained in Item 19 of our 2019 Franchise Disclosure Document also includes: (1) annual unit-level gross revenue; and (2) select expenses for expense-reporting franchises.

\*\* IBIS World Industry Report Pet Grooming & Boarding in the US, December 2018

\*\*\* Figure represents the aggregate increase in annual gross revenue for the 165 locations that were open and operating for any length of time during the 12-month period ending December 31, 2018 when compared to the aggregate annual gross revenue for the locations that were open and operating for any length of time during the 12-month period ending December 31, 2017. The financial performance representation contained in Item 19 of our 2019 Franchise Disclosure Document also includes: (1) annual unit-level gross revenue; and (2) select expenses for expense-reporting franchises.

lovers who seek a lucrative, high-growth business with long-term sustainability.

Franchise owners have to love two things: Dogs and business. They must love dogs as much as our customers do, and they must love running a business that puts dogs and their well-being first. Customers don't like leaving their dog in a crate while they're at work, and they abhor the idea of leaving their dog caged in a kennel while they're out of town. Dogs aren't meant to be warehoused. They are meant to be cared for, played with and loved.

### Premium brand position

Caring for dozens of dogs at a time is not a simple feat. Many kennels simplify the business by reducing the dogs' experience to rough concrete floors, chain-link cages and forlorn walks down a lonely dog run.

Camp Bow Wow® developed an evolved business model that provides structure and supervision for dogs, while providing them the freedom and running room to be their joyful selves. Every detail has been carefully considered. You won't find a tiny Yorkie playing with a much larger shepherd-husky mix. Smaller breeds like Chihuahuas or French bulldogs hang out in the teacup area; older dogs who wouldn't be comfortable mixing it up with the high-energy 2-year-olds are placed with other dogs their speed in our Camp play yards. At Camp Bow Wow® we separate dogs in our play yards by size, temperament and activity level with the goal of creating an energy balanced play group for the dogs. Dog parents can log into the Camp webcams with their smartphones or computers and watch their fur kids play. Our domain-area

**Franchise owners have to love two things: Dogs and Business.**

expertise has helped us hone dog-friendly policies like these that keep dogs safe and happy and keep the dog parents even happier, which inspires fierce customer loyalty and high rates of repeat business. Once people get to know us, they love us – and they're unlikely to go elsewhere.

As a premium service provider, we charge more, but customers vote with their wallets and tell us we are worth it. They love knowing that their dogs are free to romp, and that they can check in on the activity throughout the day using our live webcams. Instead of feeling guilty when they drop their dogs off, customers know they are giving their dogs a treat.

## **We are backed by an industry giant**

In 2014, Camp Bow Wow®'s founder sold the brand to VCA, Inc., a \$7 billion dollar company and the largest veterinary animal hospital network in North America. VCA's leadership saw an opportunity to take the brand to the next level and provide a springboard for Camp Bow Wow® and our franchise owners. We now have access to a brain trust consisting of a network of over 800 animal hospitals in the U.S. and Canada. This relationship has deepened our knowledge and raised the bar even higher on the standard of canine care. In 2017, VCA, Inc. was purchased by Mars, Inc.

## **We make sure every dog is a culture fit. Yup, you read that right.**

Not every dog is right for Day Camp or boarding, so every Camp has rules (all dogs must be over 4 months, vaccinated and spayed or neutered), and

every potential Camper goes through an interview to make sure he's a good fit for Camp and vice versa. The interview is a sophisticated way of evaluating a new dog step by step, from human-dog interaction to dog-to-dog interaction. Under the supervision of skilled, highly trained Counselors we add another dog and then expand the play group, evaluating their behaviors and gauging their reactions to things like the way dogs say hello to one another. Yup, we actually interview dogs.

Dogs being dogs, an introduction often takes the form of a butt sniff. "If a dog reacts negatively to its butt being sniffed, they're not going to like Camp," said Baton Rouge franchise owner Drew Detlefs.

So, yes, we've systemized butt-sniffing – and we're not shy about it.

As you can tell, we are a quirky, high-personality brand with an unmistakable corporate culture. We're passionate about our dogs and we're passionate about cashing in on the multi-billion dollar business of dogs.

## **Maximizing profits with multiple revenue streams**

Camp Bow Wow® franchises bring in revenue several ways, and are able to generate income 24 hours a day thanks to overnight boarding and day care services, which allow dogs to play all day under supervision with other dogs of their size and temperament.

- Boarding
- Day Care
- Baths & Full-Service Grooming
- Training
- Retail



## Creating “pull demand”

Pull demand is a term marketers use to define when customer acceptance of a product or service is so high, customers storm the gates, like Apple customers do. We have our own version of pull demand. Camp Bow Wow® can anecdotally measure a Camp’s success by something we call the “pull factor”: If a dog is pulling hard on his leash to get into the Camp, we know we’re doing a good job. Many of our most regular customers bring their dogs to Day Camp several days a week. For the dog, walking into Camp Bow Wow® is like walking into a favorite bar. They sidle right up to their friends and start enjoying each other’s company immediately.



Our boarders trickle in throughout the day. They’ll be spending the night with us, tuckered out after playing with the other Camp dogs. When the Day Camp dogs go home at night, the boarders settle into their comfy cabins with fleeces and cots in a climate-controlled environment with soothing, piped-in music. They even get Campfire treats before lights-out.

Boarding and Day Camp make up a big part of the business, but it’s not the only way our franchise owners make money serving pets and their parents. We also offer grooming and training services. These

services, paired with our community partnerships and local marketing efforts, help franchise owners find the sweet break-even spot quickly.

## HOW CAMP BOW WOW® DISRUPTED THE KENNEL MODEL

**Pet care franchise became the leader of the pack by transforming the way dogs are cared for when their parents aren't available**

“Disruptor models” completely upend industries by re-imagining and re-inventing products and services in ways that better align with customers’ needs and desires. As Forbes writer Caroline Howard describes it, “Disruptors are innovators, but not all innovators are disruptors.” You need more than a good idea. You also need to have the business acumen to market your idea and to execute your business plans.

Starbucks famously changed the way the world approaches coffee, carving out a niche as a place where people can relax and enjoy conversation over a latté. Uber and Airbnb tapped into the sharing economy by making it easy for people with idle cars or unused rooms to connect with customers who don't care for taxis or want to stay in a cookie-cutter hotel room. BuzzFeed pioneered a quirky mix of entertainment, news and visuals that marry viral web traffic and social media, light years ahead of traditionally stodgy media venues.

### **What business are we really, really in?**

We are in the “elimination of guilt and worry” business. Prior to Camp Bow Wow®, dog owners would go on cruise ships while their dogs were locked in a crate at the kennel. They had fun at the expense of their dog and felt guilty about it. Even going off to work was tough. It meant dog parents had to worry that the dog was home alone all day or rush back after work because they felt too guilty to enjoy happy hour when the dog needed to be let out.

Now, when they drop off their dogs at Camp Bow Wow®, they're relieved — they know their dog may have more fun than they do. One simple look around, and they know they can trust us. They can experience our level of detail and can feel our passion.



But it takes more than innovation to be a disruptor.

Camp Bow Wow®'s operational excellence shows up in our financial results. Year-over-year revenue

growth is at 12%,\* which is six times the growth rate of the national economy (2%) and nearly double the rate of the boarding and grooming industry (7%).\*\* That kind of growth stems from the way we streamlined and systematized caring for dogs. What emerged was a unique pet service model that is scalable and in tune with how our pet-obsessed culture thinks.

The hallmarks of Camp Bow Wow®'s innovative practices — like live-streaming webcams, a formula for staff-to-dog ratios and constant supervision when dogs are at play — are becoming more and more commonplace. The copycats are welcome. Imitation is the most sincere form of flattery. We remain the disruptor because we understand, in our bones, why each of those innovations are important. We love dogs. We are always looking for ways to make dogs' lives better, and to help pet parents keep their loved ones cared for and happy.

We know what it's like to worry when you need to be away from your dog for a day or two. Are they okay? Are they worried or sad? Are they having fun? Do they miss me? We erase that.



## The Original Vision: In with Camps and out with kennels

The impetus for Camp Bow Wow® comes from our founder's personal experience. Heidi Ganahl didn't want to leave her dogs in a kennel when she and her husband had to travel. A traditional kennel has dogs locked in cages for most of the day. The dog is let out two or three times a day for bathroom breaks. If they get play time, it can be just as stressful as being caged — either the dog is put into a dog run by itself, or the already-stressed pooch is put with other dogs in an environment that lacks consistent human supervision, which can be dangerous.

"My husband and I traveled a lot and I could not find a place that was good enough for my animals," she said. "So I came up with this really cool idea."

Ganahl's idea was a summer Camp for dogs — the kind of place a dog might design for himself if he could. A boarder gets a comfortable cabin with a cot, a fleece and room for his dog-mates if he's from a multi-canine home. He gets all-day play, indoors and out, with other dogs his size, age and temperament, and they're under constant supervision. At night, in Camp Bow Wow®'s temperature-controlled environment, soothing music is piped in to help tired pups get to sleep. She designed a space that was good enough for her dogs — and for millions of others, too, as it turned out. Customers fell in love with the concept as soon as it debuted in 2000. Entrepreneurs fell in

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love when franchising began in 2003.

Multi-unit owner Jordan Murray of Pittsburgh describes himself as “your average, casual dog owner” while wife and franchise co-owner Barbara is the more dog-obsessed of the two. They’d been shopping for franchise opportunities in the early 2000s when they came across Camp Bow Wow®.

“We had two dogs at the time and had been leaving them with her parents, who were getting into their 70s. We never trusted a typical kennel,” he said. When the Murrays saw how Camp Bow Wow® treated dogs – like the beloved family members they are rather than just animals – they were impressed. Not only did they love the sustainability and earnings potential, they knew they’d found the right solution for their dogs.

“They had webcams and all-day play. We finally felt we’d found a place where we’d feel comfortable leaving our dogs.”

## There are ‘pet owners’ and ‘pet parents.’ Guess who spends more?

There are basically two types of relationships people have with dogs. Dog owners treat dogs like dogs. That’s not a bad thing, because they are dogs. But “dog parents” treat their dogs like family and share a deep bond with their pets. More Americans are falling into the latter camp, and that emotional bond has helped power Camp Bow Wow®’s growth.

Dog parents are high-margin and high frequency customers and stark raving brand champions. They are fiercely loyal to those who treat their “fur kids” well.

Passionate dog parents loathe the traditional kennel model because dogs spend so much of the day trapped in cages. Before they discover Camp Bow Wow®, many dog parents are forced to make a harsh decision while they work – crating their dogs to keep them safe and prevent damage when they cannot be home. Camp Bow Wow®’s devotion to playtime, and our comfy cabins for dogs, give our 2-legged customers peace of mind that their dogs will have fun whether they are Campers for a day or a week.



Camp Bow Wow® was forward-thinking enough to create the place they know they can entrust their babies to, and smart enough to monetize it. Not only can pet parents board their fur kids with us, they can also leave them for the day or just an afternoon.

Customers’ peace of mind provides an important revenue stream for our franchise owners. Pet parents don’t wait until they’re going out of town



to send their dogs to Camp Bow Wow®. They will drop their dogs off while they are at work, or if they plan to spend the day shopping with friends. Our franchise owners and their staff get to know our frequent day Campers like members of their own families. Hi, Chessie! Welcome back, Wolfgang! Hey, Rocky! The dogs' joy is palpable, and it's a key reason we enjoy a lot of repeat business even during slower boarding seasons.

Damien D'Emic, Camp Bow Wow®'s Vice President of R&D and Analytics, says pet parents quickly learn they can use Camp Bow Wow® as a routine option in their daily lives, turning their dog over to us while they attend to other obligations.

Boarding tends to be driven by vacations, which cluster around summer and the holidays, leading to peaks and valleys in that revenue stream. Day Camp is a stable revenue stream, and the dogs that are frequent visitors help build a cohesive pack culture that helps all dogs have a good time.

Customers trust Camp Bow Wow® because we provide all the assurances of a nationally-recognized brand that's the largest pet care franchise in the country. When owners go on vacation, their dogs should have at least as much fun as their people. They need to be surrounded by trained, knowledgeable staffers and they need to be housed in a clean environment where their safety can be assured. They need socialization, exercise and great food (preferably from home so their diet isn't disrupted). They need love and affection, too. They're guaranteed all of this from our highly-engaged staffers.

We've had a big impact on the kennel industry, and our passion and curiosity about what's best for dogs and their humans drives us to keep pushing, keep

innovating. The pet services outlook through 2023 is strong per IBISWorld. Disposable income will continue to grow, and pet parents — as opposed to the more traditional pet owners — are on the rise as well. Camp Bow Wow® plans to seize these opportunities.

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✦ ✦ ✦  
**A FRANCHISE FOR  
DOG LOVERS**

**Our magnificent obsession:  
We love dogs. And we  
love business. We want to  
work with people who are  
passionate about both.**

Every franchise system exists to make money, and ours is no exception. Great businesses, though, have a larger reason for existing – a mission that makes us happy to get out of bed every morning and face the day. We love dogs. Dogs are the heart and soul of our business, the inspiration for our company’s origins and the reason everyone, from the top executives to the part-time Counselor who supervises a Teacup area full of smaller breeds, feels so driven to make things better every day.

When you tour our “Houndquarters” in Westminster, CO, you’ll notice that every office has a dog gate – and almost every office has a four-legged occupant sharing space with the humans.

We bring our dogs to work, and we truly understand the customer’s anxiety about putting their dog in day care or boarding him for several days. That kind of empathic thinking is the not-so-secret secret to our success. Dogs are our magnificent obsession, and that obsession drives everything from the state-of-the-art design of our boarding cabins and indoor-outdoor play yards to the exhaustive checklist of daily duties that is hanging in every franchise owner’s Camp.



**Must love dogs**

Millions of Americans are just as obsessed with canis lupus familiaris as we are, and they’re the customer base we’re tapping into. Big dogs, small dogs, purebreds and mutts look at us with their soulful eyes and their expressive faces and we just melt. That tail thumping on the floor as he lays at your feet; her excited two-legged dance when she hears the rustle of the treat bag in the pantry; the way they instinctively know when something’s wrong and you just need to cuddle; the thrill of running five miles with your best friend at your side.

**Camp Bow Wow®  
customers dote on  
their dogs.**

Camp Bow Wow® customers dote on their dogs. We do, too. Customers appreciate the fact that every Camp Bow Wow® has dedicated staffers who will always put the dogs first, and watch over them every minute during all-day play. They appreciate that we provide lullabies for our overnight Campers, piping in soothing music that has been proven to have a calming effect on dogs,

which is especially helpful when a dog is away from home. Customers like knowing they can watch our live-streaming webcam while they're at work to see what their pups are up to anytime. They can even check in from their mobile device with our video app.

## Making a difference in the community with Bow Wow Buddies Foundation®

Camp Bow Wow® and our franchise owners work hard, play hard... and love hard, too. We love dogs so much we can't bear the thought of them in pain. Charitable giving has always been an informal part of the company, and it became official in 2007 after founder Heidi Ganahl traveled to Greece when she learned the plight of street dogs there.

"We ended up bringing back 26 Greek dogs, more to raise awareness about their situation than anything, but we fell in love with the people in Greece who were doing the work and trying to save the dogs," she said.

"We realized we really should create a 501(c)3 and make it a formal part of our business."

Thus, the Bow Wow Buddies Foundation® was born and in 2015 the Foundation refocused its efforts to provide urgent medical care funds to sick and injured dogs in need. Each year, countless pets are denied medical care simply because their parents can't afford the treatment costs. The Foundation offers medical grants to individuals facing this heartbreaking situation, and to shelters and rescue organizations that need assistance to cover necessary medical treatments for dogs

awaiting adoption. Because of the dedication and support of our franchise owners, the Foundation has granted over \$450,000 to help more than 350 sick and injured dogs in need.

Franchise owners also get involved in their individual communities, fostering dogs and helping them find forever homes, partnering in adoption events and working with shelters and rescue groups to promote spaying and neutering to curb overpopulation. So far, their work has helped find homes for more than 10,000 animals.



## WHAT SERVICES DOES CAMP BOW WOW® PROVIDE?

### Boarding and Day Care drive most revenue, and other services create additional opportunities for pet care franchise

The pet care industry has tremendous tailwinds. That means it provides your pet care franchise with tremendous lift — and tremendous potential. Camp Bow Wow® is dedicated to making life better for all dogs, but we're equally committed to helping all our franchise owners find success.

Boarding and day care are the two core services that drive business at Camp Bow Wow® franchises, but we offer many more services to enrich both our canine care and provide upsell opportunities for franchise owners.

**“We are committed to helping our franchise owners succeed.”**

- **Boarding** Premier, temperature-controlled facilities with comfy cots, cozy fleeces and a devoted staff make for happy four-legged Campers and pet parents who keep bringing them back to enjoy more perks like premium cabins/private accommodations and Campfire Treats™ at tuck-in. Plus, all our overnight

Campers get to enjoy Day Camp during the day.

- **Day Care** Dogs are social animals who crave company, and care during the day is increasingly the best option for singles and two-career families who care about their dogs' needs. Dogs are supervised in spacious indoor and outdoor play yards divided by age, size and temperament.
- **Baths & Full-Service Grooming** Nobody wants a smelly dog, and a bath is offered to every Camper before he goes home. We also offer full-service grooming for those times between stays when owners want to spruce up their pups. Baths and grooming are a great upsell opportunity.
- **Training** Beyond teaching a dog to sit, stay or heel, our Behavior Buddies Trainers work with dogs in a reward-based program to alleviate bad behaviors and help dogs be the best canines they can be in private sessions or group class settings.
- **Retail** Though it's only a small portion of our business model, each Camp carries a modest selection of toys, treats, food and leashes, in case pet parents have left something important at home.

“We're passionate about two things: pet care and monetizing pet care,” said Camp Bow Wow® VP of Operations Laurie Windler. “We are committed to helping our franchise owners succeed.”



## Who makes a successful franchise owner?



Camp Bow Wow® appeals to both single-unit and multi-unit investors, but no matter what the level of investment, they all share some common characteristics. Our franchise owners are:

- Passionate about business
- Passionate about dogs
- Able to work in a high-energy environment
- Able to instill a strong service culture and lead by example
- Possesses a strong business acumen
- Good corporate citizens who are willing to be involved in community and participate in events involving dogs and their people

## HOW MUCH MONEY CAN I MAKE?

### Camp Bow Wow® franchises can ramp up quickly

Camp Bow Wow® experienced positive year-over-year same-Camp sales growth even through the Recession, showing that pet parents kept spending even through lean times. Pet owners spent more than \$70 billion in 2018, according to American Pet Products Association (APPA), and research shows they'll cut back on their own luxuries before skimping on their pets.\*

Meanwhile, the APPA says 48% of American households have dogs – an estimated 90 million dogs, in fact, and those numbers are growing every day. Pet ownership has been on the rise for the past two decades, and the trend is predicted to heighten. Research from Mintel shows that over 60% of owners consider their animal companions to be members of the family. All these factors contribute to strong revenue growth in the boarding and grooming industry, and what that means for you is the potential to not only achieve your financial goals, but to exceed them.

Camp Bow Wow® franchise owners enjoy being part of a low-risk, high-growth industry, with high rates of repeat customers, and are part of a company whose business model ramps up quickly.

Our range of services also makes our business model flexible, allowing franchise owners to tap into those areas that best suit their individual market demographics. Boarding tends to be our

bread-and-butter, but in some markets the Day Camp side of the business is dominant.

Our financial results speak for themselves. According to our Franchise Disclosure Document (FDD) for 2019, the latest year for which figures are available for Camps open more than 12 months, our top 25% highest earning franchises generated an average of \$1,291,047 in annual gross revenue, and the average for all locations was \$878,850.\*\* The average annual owner's discretionary income was \$268,195 for the top 25%, and \$165,694 for all Camps open more than 12 months.\*\*\*

\* 2017-2018 APPA National Pet Owners Survey

\*\* Figures represent averages for the 133 revenue-reporting franchises open and operating for more than 12 months during the 12-month period ending December 31, 2018. Of all 133 franchises, 61 (46%) exceeded the average of \$878,850. Of the 34 franchises representing the top 25%, 8 (24%) exceeded the average of \$1,291,047. Of the 34 franchises representing the bottom 25%, 18 (53%) exceeded the average of \$521,129. The financial performance representations contained in Item 19 of our 2019 Franchise Disclosure Document also include: (1) select expenses for expense-reporting franchises; and (2) system-wide gross revenue.

\*\*\* Figures represent averages for the 133 expense-reporting franchises open and operating for more than 12 months during the 12-month period ending December 31, 2018. Of all 133 franchises, 60 (45%) exceeded the average of \$165,694. Of the 33 franchises representing the top 25%, 15 (45%) exceeded the average of \$268,195. Of the 33 franchises representing the bottom 25%, 17 (52%) exceeded the average of \$100,409. The financial performance representations contained in Item 19 of our 2019 Franchise Disclosure Document also include: (1) annual unit-level gross revenue; and (2) system-wide gross revenue.

According to Item 19 of Camp Bow Wow®'s FDD (Franchise Disclosure Document), franchise owners are achieving the following benchmarks. We will provide you the full disclosure document once we have an initial conversation and you submit your credentials as a possible franchise owner.

## What do Camp Bow Wow® franchisees do in sales?

Out of all the Camps reporting their sales, according to Item 19 of the FDD, the average mature Camp (open more than 12 months) generated average annual revenues of \$878,850. Our top 25% averaged \$1,291,047 with a high of more than \$2.2 million.\*\*\*

Revenue Reporting CBW Franchises	Annual Gross Revenue (Unaudited)	
	High	Low
All Revenue-Reporting Franchises	\$2,248,724	\$259,639
Top 25%	\$2,248,724	\$1,066,835
Bottom 25%	\$660,761	\$259,639

## What do Camp Bow Wow® franchisees earn?

The top 25% of mature Camps (defined as open over 12 months) reported earning a healthy \$268,195 or 21% of sales.\*\*\*\*

The average franchise owner open more than 12 months reported earnings in the neighborhood of \$165,694 or 19% of sales.\*\*\*\*

The system-wide sales increase from 2017 to 2018 was 12%.\*\*\*\*\*

Revenue Reporting CBW Franchises	Annual Gross Revenue (Unaudited)	
	Average	Median
All Revenue-Reporting Franchises	\$878,850	\$850,727
Top 25%	\$1,291,047	\$1,214,454
Bottom 25%	\$521,129	\$535,922

\*\*\* Figures represent averages for the 133 revenue-reporting franchises open and operating for more than 12 months during the 12-month period ending December 31, 2018. Of all 133 franchises, 61 (46%) exceeded the average of \$878,850. Of the 34 franchises representing the top 25%, 8 (24%) exceeded the average of \$1,291,047. Of the 34 franchises representing the bottom 25%, 18 (53%) exceeded the average of \$521,129. The financial performance representations contained in Item 19 of our 2019 Franchise Disclosure Document also include: (1) select expenses for expense-reporting franchises; and (2) system-wide gross revenue.

\*\*\*\* Figures represent averages for the top 25% of all expense-reporting franchises open and operating for more than 12 months during the 12-month period ending December 31, 2018. Of all 33 franchises representing the top 25%, 15 (45%) exceeded the average of \$268,195. Of the 33 franchises representing the bottom 25%, 17 (52%) exceeded the average of \$100,409. The financial performance representations contained in Item 19 of our 2019 Franchise Disclosure Document also include: (1) annual unit-level gross revenue; and (2) system-wide gross revenue.

\*\*\*\*\* Figure represents the aggregate increase in annual gross revenue for the 165 locations that were open and operating for any length of time during the 12-month period ending December 31, 2018 when compared to the aggregate annual gross revenue for the locations that were open and operating for any length of time during the 12-month period ending December 31, 2017. The financial performance representation contained in Item 19 of our 2019 Franchise Disclosure Document also includes: (1) annual unit-level gross revenue; and (2) select expenses for expense-reporting franchises.

Expense Reporting CBW Franchises	Annual Occupancy Expense (Unaudited)*	
	High	Low
All Expense-Reporting Franchises	\$282,259	\$27,535
Top 25%	\$282,259	\$58,215
Bottom 25%	\$156,987	\$27,535

\*Figures represent the high and low annual occupancy expense of all 133 expense-reporting franchises that were open and operating for more than 12 months as of December 31, 2018, as well as the high and low annual occupancy expense of the top 25% and bottom 25% of all expense-reporting franchises.

Expense Reporting CBW Franchises	Annual Occupancy Expense (Unaudited)**	
	Average	Median
All Expense-Reporting Franchises	\$128,713	\$126,816
Top 25%	\$163,711	\$158,961
Bottom 25%	\$93,106	\$91,856

\*\*Figures represent the average and medial annual occupancy expense of all 133 expense-reporting franchises that were open and operating for more than 12 months as of December 31, 2018, as well as the average and median of the top and bottom 25%. Of all 133 expense-reporting franchises, 63 (47%) exceeded the average of \$128,713. Of the top 25%, 15 (45%) exceeded the average of \$163,711. Of the bottom 25%, 15 (48%) exceeded the average of \$93,106.

Expense Reporting CBW Franchises	Annual Labor Expense % (Unaudited)***	
	High	Low
All Expense-Reporting Franchises	83%	19%
Top 25%	58%	19%
Bottom 25%	72%	24%

\*\*\*Figures represent the high and low annual labor expense for all 133 expense-reporting franchises that were open and operating for more than 12 months as of December 31, 2018, as well as the high and low of the top and bottom 25%.

Expense Reporting CBW Franchises	Annual Labor Expense % (Unaudited)****	
	Average	Median
All Expense-Reporting Franchises	39%	38%
Top 25%	37%	36%
Bottom 25%	41%	38%

\*\*\*\*Figures represent the average and median annual labor expense for all 133 expense-reporting franchises that were open and operating for more than 12 months as of December 31, 2018, as well as the average and median of the top and bottom 25%. Of the 133 expense-reporting franchises, 57 (43%) exceeded the average of 39%. Of the top 25%, 15 (45%) exceeded the average of 37%. Of the bottom 25%, 14 (45%) exceeded the average of 41%.

Expense Reporting CBW Franchises	Annual Owner's Discretionary Income (Unaudited)*****			
	Average		Median	
	\$	% <sup>12</sup>	\$	% <sup>13</sup>
All Expense-Reporting Franchises	\$165,694	19%	\$154,501	18%
Top 25%	\$268,195	21%	\$253,130	21%
Bottom 25%	\$100,409	19%	\$116,175	22%

\*\*\*\*\*Figures represent the average and median owner's discretionary income for the 133 expense-reporting franchises that were open and operating for more than 12 months as of December 31, 2018, as well as the top and bottom 25%. Of the 133 expense-reporting franchises, 60 (45%) exceeded the average of \$165,694. Of the top 25%, 15 (45%) exceeded the average of \$268,195. Of the bottom 25%, 17 (52%) exceeded the average of \$100,409.

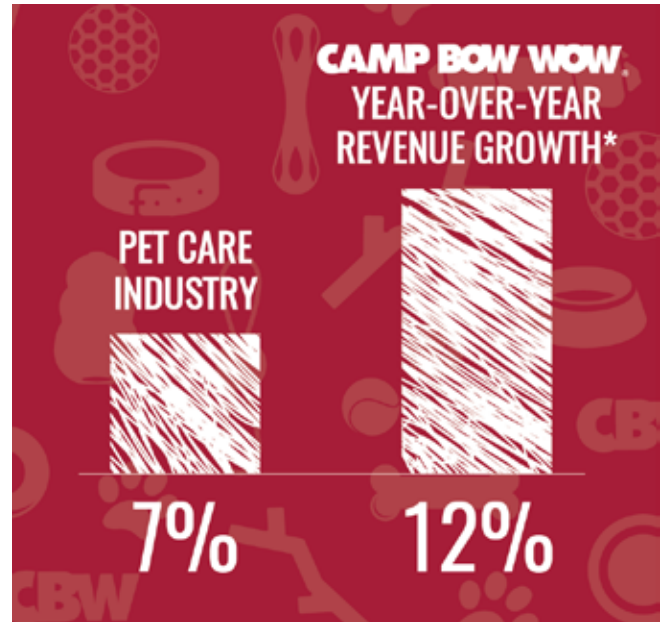


## HOW BIG IS THE PET CARE INDUSTRY?

### In good times and bad, pet spending endures – even during the Great Recession

It's a given that ours is a business that attracts dog-lovers. But if that's all we were, our business would have gone to the dogs a long time ago. The reality is Camp Bow Wow® is a company that generated more than \$125 million in revenue in 2018\*\* and is positioned near the top of an industry that's growing by 7% a year – three times as fast as the national economy.

The grooming and boarding segment of the industry has almost doubled since 2005, according to IBISWorld, thanks to the way our customer base acquires and relates to their pets. Pet ownership is on the rise and more pet owners have increased disposable income, driving them to spend an estimated \$8 billion on grooming and boarding in 2018 alone.\*\*\* The real impetus behind this phenomenal growth? The shift in the way people think of their dogs. Once kept around largely as helpers and guards, dogs now occupy a space as beloved family members, and devoted pet parents are willing to spend more money on them.



### Camp Bow Wow® is a sustainable business

Detroit franchise owner Ann Roth and her husband opened their first Camp in 2003, and five years later, when the Great Recession hit, they were in the midst of opening their second location.

“A lot of businesses didn’t make it. We made it through all of that,” Roth said. “That says something.”

Today, she and her husband Bob, both in their early 50s, “I could not be more happy with the direction of the brand,” Roth said.

\* Figure represents the aggregate increase in annual gross revenue for the 165 locations that were open and operating for any length of time during the 12-month period ending December 31, 2018 when compared to the aggregate annual gross revenue for the locations that were open and operating for any length of time during the 12-month period ending December 31, 2017. The financial performance representation contained in Item 19 of our 2019 Franchise Disclosure Document also includes: (1) annual unit-level gross revenue; and (2) select expenses for expense-reporting franchises.

\*\* Figure represents the aggregate Gross Revenue for all locations that were open and operating in 2018, including those owned by the Franchisor.

\*\*\* IBIS World Industry Report Pet Grooming & Boarding in the US, December 2018

## Who are Camp Bow Wow® customers (the two-legged kind)?

One thing in the Roths' favor in such a challenging climate was a customer demographic that remained dedicated to spending money on their pets. Industry research shows that the consumers who spend the most on their companion animals are couples without children – empty nesters and single people.

## Why do customers choose Camp Bow Wow®?

In 2018, Camp Bow Wow® welcomed 270,000 4-legged customers, who spent 4.3 million dog visits with us. Providing Day Camp and overnight services is more complex than simply warehousing dogs in a large space. Many of our franchise owners operate in high-volume locations, caring for more than 70 dogs per day. They must train and maintain a staff of highly skilled and engaged employees who not only handle the varied needs of the dogs but are also skilled at interacting with customers who are very particular about where they leave their fur babies.



Camp Bow Wow® creates high customer intimacy by treating our dog parents' babies like they were our own. Put another way, we pass our customers' sniff test. Our customers tell

us they come to us because we make it fun and we keep dogs safe. We have webcams that cover the entire Camp. We have a climate-controlled environment with alarms that trip and alert the franchise owner if the Camp becomes too hot or cold. We pre-screen dogs to make sure they'll be safe and comfortable and enjoy being around other dogs. Our customers are discerning about their pet service providers, and they appreciate our attention to detail.

**Our customers are discerning about their pet service providers, and they appreciate our attention to detail.**

## WHAT ARE THE STARTUP COSTS FOR A CAMP BOW WOW®?

**Startup costs for a Camp Bow Wow® typically range from \$751,000 to \$1,458,500**

The startup investment for a Camp Bow Wow® franchise is all inclusive and ranges from \$751,000-\$1,458,500. Startup costs depend on a variety of factors including the size of your facility, construction costs and your local market and may

be lower or higher than the range shared above.\*

*\*For more information on these costs, please refer to Item 7 of our 2019 Franchise Disclosure Document. Your costs may vary depending on multiple factors.*

The typical owner will invest \$150,000-\$200,000, which includes their franchise fee, and finance the rest through the SBA or other loan options. We do not provide in-house financing, but we do have preferred finance contacts for those looking for a loan to fund their franchise.

The following table is from our 2019 Franchise Disclosure Document. These figures are discussed in greater detail in our Franchise Disclosure Document. Once you've started a conversation with Camp Bow Wow® about joining the brand, if it looks like we're likely to be a good fit, we'll send you a copy of the FDD to discuss in detail.

Type of Expenditure	Amount	Method of Payment	When Due	To Whom Payment is to be Made
Initial Franchise Fee	\$32,500 - \$50,000	Lump Sum	Upon signing the Franchise Agreement	CBW
Travel Costs for All Initial Training	\$0 - \$7,500 per person	As Incurred	Prior to and during training	Airlines, Hotels, Restaurants, and other Third Parties
Leasehold Improvements	\$363,000 - \$814,000	As Incurred	Before Opening	Contractors and other Third Parties
Equipment, Supplies, and Opening Inventory	\$56,000 - \$97,000	As Incurred	Before Opening	Suppliers
Dog Cabins and Interior Fencing	\$109,000 - \$150,000	As Incurred	Before Opening	Suppliers
Signage	\$3,000 - \$30,000	As Incurred	Before Opening	Suppliers
Webcam System	\$10,000 - \$25,000	As Incurred	Before Opening	Suppliers
Camp Payroll	\$5,000 - \$30,000	As Incurred	Before Opening	Your employees and independent contractors
Rent and Utilities	\$18,000 - \$40,000	As Agreed with your Landlord	Before Opening	Third Parties and Suppliers
Plans and Permits	\$25,000 - \$35,000	As Incurred	As Incurred	Third Parties
Professional Services	\$2,500 - \$15,000	As Incurred	As Incurred	Third Parties
Camp Launch Advertising	\$25,000	As Agreed	As incurred from the effective date of the Franchise Agreement through your grand opening event	Third Parties, or CBW if we require
Financing Fees	\$2,000 - \$40,000	As Agreed	Before Opening	Third Parties
Additional Funds for First 12 months of Operations	\$100,000	As Incurred	As Incurred	Personnel, Suppliers, and Third Parties
<b>Total</b>	<b>\$751,000 - \$1,458,500</b>			

## WHO MAKES A SUCCESSFUL FRANCHISE OWNER?

### Business acumen and a passion for pooches are the perfect mix

We tend to have two types of people who are a good fit for our franchise. The first group absolutely adores dogs and they want to be very hands-on. They tend to run owner-operated units that often become a family business. They're out in the community, building relationships and managing the team day to day.

The second group is made up of sophisticated, savvy investors or empire builders. They love pets – and they also love highly profitable, scalable models that are unique in the marketplace. They look to scale quickly by opening multiple Camps.

Whichever group you're in, "it's a good time to get on board with us because we have proven ourselves in over 160 locations," said Trevor Robinson, Director of Development. "All the heavy lifting has been done, yet we still have hundreds of opportunities across the U.S. and Canada."

Some 32% of our franchise owners run multiple locations, relying on a manager model for day-to-day operations.

### What makes Camp Bow Wow® scalable?

Three things make it easy to scale with Camp Bow Wow®:

- Strong business model
- Highly engaged employees
- Raving fan dog parents

In 2018, Camp Bow Wow® welcomed over 270,000 four-legged customers, that visited us 4.3 million times. You don't generate that level of market dominance without good employees.

Camp employees tend to share our magnificent obsession. This is a passion business, and there's a strong labor pool of employees who share that passion to take care of dogs.

Multi-unit owners Jordan and Barbara Murray of Pittsburgh can attest to that. They were both working in banking when they opened the first of their four locations in 2005.

Things were going so well that Barbara soon joined the business full-time. "My wife decided to leave her job at the bank because she was working for someone else and dealing with all the stress that went along with being a high-level executive. She wanted to come and do something with the dogs. We were tired of building someone else's future."

Today, their future looks bright and business is booming. As for whether any particular career background is helpful for a pet care franchise owner, Murray doesn't think the specifics matter too much. "People come into it with experience



managing other people. Some people come in with great dog experience. Is it valuable? Absolutely. Is it required? No. Some come in with great marketing backgrounds. I don't think there's any given skill set," Murray said.



## Must love people, not just dogs

People skills are more valuable than you might think in such a dog-centric business. Camps typically employ upwards of 20 people, making labor by far the biggest expense and managing those human resources a vital piece of the puzzle. You'll not only be juggling the demands of a large staff, you'll also be plugging into your community, connecting with the large base of dog-lovers who need Camp Bow Wow®'s services and may not even know it yet. Those relationships with the two-legged clients are the ones that will drive the business, whether you own one location or five.

North Carolina attorney James Daniel and his wife Patti, a teacher, have both maintained their careers while operating Camps in Charlotte and Matthews, NC, and, Fort Mill, SC. They set their sights on Camp Bow Wow® as the perfect investment for

their retirement plans, but for now they're enjoying the process of building up their business.

"It's very rewarding," said Daniel. "First to be able to deliver a service that's important to people because you're taking care of a family member. The families trust us to take care of their dogs when they're at work or traveling. It's also rewarding to provide a livelihood for employees. We have quite a few employees now."

The Daniels employ a general manager to oversee daily operations and also have a Camp Director at each location. In Daniel's case, he tends to spend most of his time — about 40 hours a month — with finances, bookkeeping and "the numbers side of things" while his wife works to oversee marketing.

"Anyone looking at a franchise business, and particularly in my situation where you're not really involved full time, you want a proven business model that can be modeled and scaled successfully. What we get in terms of corporate support from Camp Bow Wow® is a lot of value-added things like tech enhancement and marketing support that an independent business wouldn't have access to."

## WHAT MAKES A GREAT LOCATION?

### Being a good neighbor is as important as zoning when it comes to running a boarding and grooming franchise

Camp Bow Wow® is North America's No. 1 pet care franchise, with over 160 open units in the U.S. and Canada and dozens more in development. With that many locations from coast to coast and in every major region of the country, we've learned a few things about the best way to select a site for your new Camp Bow Wow® franchise.

There's always going to be paperwork when it comes to a business that deals with the number of animals that we do on a daily, weekly and yearly basis. In 2018, Camp Bow Wow® welcomed 270,000 four-legged customers, who spent 4.3 million dog visits with us. With our policy of "All Day Play Snooze the Night Away®" and the al fresco portion of our indoor-outdoor play areas, sometimes things get a little raucous.

Franchise owners need to work with their local zoning and planning officials as well as their Camp Bow Wow® corporate support team to make sure they find the right part of town for a Camp.

### Where we work best

The typical location is 4,000 to 8,000 square feet of industrial or retail space, and most franchise

owners lease their property. We strive to locate near targeted demographics and within proximity to major thoroughfares. We can co-locate in multi-tenant buildings or stand-alone sites. Locating near other businesses that cater to a similar high end customer base is always a plus!

### Mark your territory today

Although Camp Bow is a dominant brand occupying the "mover and shaker" position in a rapidly growing \$72 billion industry, hundreds of territories are still available in the U.S.



## WHO ARE OUR CUSTOMERS AND WHAT ARE THEY SAYING?

### Two-legged and four-legged customers alike love the perks of our pet franchise

Henry O’Connell, a project manager for a Denver-area builder, wanted to find a place for his rescue pup Sammie that would keep her entertained, energized and take the edge off her anxiety issues.

He heard about the Camp Bow Wow® near Coors Field in downtown Denver from his brother and sister-in-law. Their dog is six months old and “insanely full of energy,” O’Connell said.

Did a day at Camp Bow Wow® do a good job of burning off that energy? “Shockingly so.... Whenever they bring her home from here, she’ll actually relax for once and stop attacking all the cats.”

That seemed like just the sort of place for Sammie, a shepherd-chow mix. As Henry and Sammie prepared for Sammie’s interview – the meet-and-greet protocol Camp Bow Wow® requires of every dog before admitting them to Camp – Sammie whined softly, shivering nervously. O’Connell watched on the Camp Bow Wow® LoDo lobby monitors as a Camp Counselor brought Sammie back to the interview space and slowly introduced her to the Day Camp environment. Sammie began to meet other dogs, to sniff around, to trade



olfactory introductions. Sammie’s anxiety began to melt away, and after 30 minutes or so, O’Connell was able to leave her in trusted hands, knowing he could check up on her at any time on the webcam feed on his smartphone or his computer.

“The place that I have taken her for about four years was getting crowded, and I needed an alternative, a better place,” O’Connell said. “She came home nice and tired from Camp Bow Wow®,” which is helpful for a dog with Sammie’s energy, O’Connell said. “And obviously, it helps with her attitude and being happy, her overall pleasure.”

“She has a ton of fun, I can tell. She still drags me in here.”

Jacquelyn Pyun brings her dog Ushuaia, a 2-year-old shepherd mix, to Camp Bow Wow® in Denver’s LoDo neighborhood about once a week because the rescue group where she found her canine companion thought it might help with the pup’s innate shyness. It has, and Pyun recommends Camp to her dog friends “all the time.”

“My dog is incredibly hyper and she needs a lot of exercise, and so it really helps give her socialization. And also she comes home and sleeps for 12 hours, which she never does, which is awesome. I think it builds her confidence.

“She has a ton of fun, I can tell. She still drags me in here.”

## Testimonials and reviews

Of course, there are thousands of such happy reviews from around the country, and we invite you to check them out. Our customers review their local Camp Bow Wow® on social media, so you can find out exactly what they’re thinking. We pulled a few of our favorites:

Dog parents don’t come any more neurotic than me. That’s a fact. So, needless to say, I pondered bringing my little nugget here for quite a while before I worked up the nerve. What the heck was I waiting for?! Camp Bow Wow® is a doggy wonderland! There are tons of other dogs to play with and “counselors” watching them non-stop. Prices are reasonable and it is money well spent.

Highly recommended!

—Heather H., Las Vegas, Yelp!

I love Camp Bow Wow®! And so does Kuma :) I have brought him here quite a few times whether I need to go out of town for work, or am going to Disneyland (and feel he should have doggy Disneyland time) or even on days I know I am working late. The Camp here is really friendly and the staff puts up well with calls to check up on Kuma my fur baby! :) They are always positive and it makes me feel at ease knowing Kuma is well taken care of with people who enjoy animals and their jobs there :)

Overnight stays prices are very good and include two full days of Camp which is awesome !! (some places do not include Camp play days with overnight and lock up dogs during the day :( )

Another huge plus is the cameras so you can watch or check in on your dog if you’re missing them or curious what they might be up to, if you don’t see them you can always call and the employees there are happy to update you on what’s going on with your puppy :) (I called once and Kuma was eating lunch) lol

I would highly recommend Camp Bow Wow® and there are multiple locations, which is super convenient for traveling as well :)

—Maxine M., San Diego, Yelp!

At Camp Bow Wow® they make you feel like family! All of the staff members have smiles on their faces! You can tell they love their jobs! I’m very impressed with how clean the facility is! A great bonus is that you get to watch your pup while they are there!

—Betty D., Royal Oak, MI, Yelp!

I have been taking my dog to Camp Bow Wow® since he was 8 months old. He will be 4 soon. When I pull up to the door he starts wagging his tail and can’t wait to get out. The staff is so friendly and they just love on my dog. He has spent full days and even some overnights and I have no worries that the staff is not taking good care of him. When I pick him up he comes out all excited and he looks like he is smiling! I wouldn’t think of taking him any place else. This is an awesome place to take your pet.

—April B., Alpharetta, GA, Facebook

Our boy (Thorne) loves Camp Bow Wow® & all the staff. He gets so excited when we tell him he is going to Camp Bow Wow®. He starts jumping whining & ready to go. He calms down on the ride



there. Then when we get off the exit, he knows he is close & he starts jumping & whining again, when we get there he runs for the door. We love Camp Bow Wow® also for the great care & the love they give our boy. Thank you Camp Bow Wow® staff.

—Sue M., Westlake, OH, Facebook

Koda loves going to Camp! He actually will run to the door when asked if he wants to go. I love the communication between the counselors and the parents. Our fur-babies are very important to us, and Camp Bow Wow® recognizes this. Overall I think it's incredible!

—Jessica G., San Antonio, TX, Facebook

I like Camp Bow Wow® because they took good care of our Buddy for two days. I really like the idea of the videos of our dog playing. I was very happy to see what Buddy was doing whenever I wanted. That was great! I think Buddy loved playing with other dogs and he loved the place. When we pick him up, they give us all the details of what he did and whom he played with and how he ate. I loved reading that! The price was also very reasonable. I will for sure leave my pet here, next time we go on a vacation.

—Padmapriya N., Waukesha, WI, Google Places

Sonny is so eager to return to visit his friends at Camp Bow Wow® in Myrtle Beach. He knows that his Dad gives him more treats when he has enjoyed himself at the beach. It's easy to relax and enjoy all that Myrtle Beach has to offer knowing that Sonny is well taken care of in a safe, comfortable environment which ensures that all his playmates are healthy and have good manners! So whether on vacation at the beach or "day-tripping", I'm happy that the Camp is at the beach!

—Marshall S., Myrtle Beach, SC, Google Places

I take my dog here on days when I know we won't have time to exercise. Wonderful facility. The staff is very friendly and loves the dogs. I am able to download the app and watch my dog run around throughout the day. When I pick her up from "Camp" she immediately falls asleep in the back of the car and does the same when she finds the couch. I couldn't be happier with Camp Bow Wow®.

—Shea K., Tonawanda, NY, Google Places

**MUST LOVE DOGS:  
THE CAMP BOW WOW®  
STORY**

**How one woman’s vision for better pet care became a game-changer**

Heidi Ganahl didn’t exactly set out to rock the pet franchise world; she just wanted better options for her dogs. She and her husband traveled constantly, and she hated the very idea of leaving her animals in some facility where they would lay around on rough concrete floors or be confined in chain-link boxes and be ignored for hours at a time. That’s what most kennels were like in 2000.

For Ganahl’s two fluffy shelter dogs, that just wasn’t good enough. “I knew there were a lot of other people just like me,” Ganahl said.

She opened her first Camp Bow Wow® in the Denver area in 2000, and at the time she had no goals for growing and franchising the business. Ganahl thought her first Camp might end up being more of a traditional retail pet store. “But as I started to see the customers, the furry ones and the human ones, enjoy the business so much and enjoy the experience of Camp Bow Wow®, I started to get this light bulb.”



**How Camp Bow Wow® became a franchise**

Camp Bow Wow® disrupted the kennel business model. It’s the sort of space that we like to think dogs would have designed for themselves if they could have. Ganahl created a unique outfit with protocols and systems that make it easy for franchise owners to duplicate while setting a bar so high that competitors struggle to match.

In 2014 VCA (Veterinary Clinics of America), a multi-billion dollar network of over 800 animal hospitals and thousands of veterinary professionals across 43 states and 5 Canadian provinces, purchased Camp Bow Wow®. Backed by the power of VCA’s tremendous knowledge of pet care and deep resources, Camp Bow Wow® is perfectly positioned to continue to grow and sustain its market dominance for the long haul.

“They’ve brought so many resources to the table and so many wonderful people who can help us grow the business, especially on the veterinary care side,” Ganahl said.

We’re already a top company in a highly profitable industry, one that’s growing at

twice the pace of the national economy and that is predicted to continue that growth trend for the foreseeable future. Ganahl’s savvy decision to join forces with VCA proves that lightning can strike twice.

“I didn’t want to sell the business to any old private

equity. I'd rather play with a great name in the pet industry that I trust," she said. "I still love waking up every day and taking on the next business challenge."

## Our magnificent obsession

Camp Bow Wow® and our franchise owners work hard, play hard... and love hard, too. We love dogs so much we can't bear the thought of them in pain. Charitable giving has always been an informal part of the company, and it became official in 2007 after founder and Heidi Ganahl traveled to Greece when she learned the plight of street dogs there.

"We ended up bringing back 26 Greek dogs, more to raise awareness about their situation than anything, but we fell in love with the people in Greece who were doing the work and trying to save the dogs," she said. "We realized we really should create a 501(c)3 and make it a formal part of our business."

Today, the Bow Wow Buddies Foundation® provides urgent medical care funds to sick and injured dogs who are either homeless or whose parents cannot afford to pay their veterinary bills. For struggling families, the Foundation is a lifeline that can ease the financial burdens of treating their dog and potentially prevent the heartbreaking loss of their furry loved one as a result. For shelters and rescues, the Foundation helps dogs needing medical attention so they can be adopted into a forever home.

The Foundation was established because Camp Bow Wow® is committed to quality care for all animals, not just our own Campers. Giving back is at the core of our mission and our Foundation provides each owner with the opportunity for

involvement in charitable animal care, perfect for the businessperson with benevolence on the brain.

To date, the Foundation has raised over \$450,000 and helped more than 350 sick and injured dogs. One such grant recipient, Bella, received help from the Foundation to cover the cost of ACL surgery. Her mom, Nancy, expressed her gratitude to the Foundation and said, "Thank you to the Foundation for the most generous gift to help my Bella. She's recovering great from her surgery. We are eternally grateful that there are people and places like you that are willing to give a

**"We are eternally grateful that there are people and places like you."**

hand to those less fortunate. I truly hope I can pay it forward someday." Providing a second chance to dogs like Bella, and many more, continues to inspire our franchise owners to support Foundation efforts and make a difference in the animal community.



Camp Bow Wow® is positioned at the top of the pack today because one woman refused to accept that it was okay to cage a dog for 18 hours a day. She took a dream at the turn of the millennium and parlayed it into a vision that has provided successful franchises to hundreds, jobs to thousands and, most importantly, transformed the lives of hundreds of thousands of dogs.

"Since that time it's grown beyond my wildest expectations," Ganahl said.

## WHAT IS CAMP BOW WOW®'S CULTURE?

**Camp Bow Wow® is a fun franchise that takes a few life lessons from our furry friends**

We knew from the outset we wanted to foster a different kind of culture, something as quirky and fun as our brand.

- We're informal. (Suits tend to show dog hair.)
- We exist to support franchise owners.
- Franchise owners exist to support dog owners.
- Dogs exist to make life awesome.

Dogs move freely throughout our "Houndquarters" in Westminster, CO, with pet gates for each office door so our fur friends can join us for the workday. We appreciate laughter, and probably go overboard with the dog puns. We're lighthearted — except when it comes to our devotion to franchise owners' return on investment. When it comes to generating ROI, we're dogged.

We work hard, play hard and go to bed tired — just like our Campers. And our franchise owners.

"Something always makes your day. We don't go



a day without laughing," said Heidi Duffy, who co-owns a Camp in southern New Jersey with business partner Michelle Bryson.

Duffy and Bryson both look forward to Howl-o-ween, where customers are invited to bring in their dogs in costume. "We decorate one of our rooms and we take pictures of them and give them treats to take home. That is such a hoot," Duffy said.

## Who makes a good employee?

Camp Bow Wow® franchises are high-volume businesses run with the help of 20-plus employees depending on the number of dogs. They do most of the dog-monitoring and cleaning and feeding and training, and it's vital that they be included in our vision for Camp Bow Wow®.

Franchise owners often get applicants who come to them from veterinary backgrounds, people who always knew they wanted to work with animals



but didn't count on the stress and heartbreak that can go along with the wellness care at a vet's office.

Camp Director Shannon Gonzales at the franchise in Parker, CO, is as much a dog-lover as everyone else in the company. She started out as a Camp Counselor in 2007 and now manages a staff of 20. In terms of different positions at the Camp, Gonzales has held "pretty much all of them." Gonzales loves the challenges of managing a large staff and an even larger coterie of dogs. She's very hands-on, jumping in to help with everything from marketing events to answering phones. And of course, she comes to know and love her canine clients.

Gonzales is moved to tears when recalling the passing of a special senior dog who had become a

fixture at the Parker Camp. "These dogs become part of your family, and that's why I love what I do," she said.

# THAT'S SO PUNNY!

We love a good dog pun almost as much as we love a good dog. You'll hear a lot of them when you talk to anyone from Camp Bow Wow. We've even created a list that you're welcome to re-FUR to anytime:



## WHAT ARE FRANCHISE OWNERS SAYING?

### Is Camp Bow Wow® a good franchise? Hear from the experts – our franchise owners

We have more than 226 franchise owners operating over 160 Camp Bow Wow® units in the U.S. and Canada. Talking to franchise owners is one of the most important steps in the process of evaluating a franchise opportunity, as if you choose to pursue a Camp Bow Wow® franchise, we'll help you get in touch with franchise owners to get their perspectives on the business.

Here's a preview of what you might hear:

"With Camp, I don't feel like I work at all because I love it. I don't think you can put words to it. I literally walk into it and there's 99 dogs and it's loud and crazy and I just love it. I got married just about a year ago and now I have six kids between his kids and mine, and I come here to relax. I'm not in the yards; I help customers as they roll in, but you've got to work on your business, not in it. That balance is perfect. I can always go in there and play with the dogs if I want to."

—Tami Sarra, South Windsor, CT

"When I talk with potential franchise owners who call to investigate the brand for their own due diligence, one thing I always try to point out is that even though we're not there every day actually

operating the Camp, I'm still the one that gets the call in the middle of the night when the (climate-control) alarm goes off. If any type of emergency arises, you're still the one responsible. It's still a 24-7 commitment. Once you open, you never close. You've always got dogs there, and that's the thing I want to point out to people who are used to a 9-5 job."

—James Daniel, Charlotte, NC

"I feel so good about the level of care we provide people. They aren't having to take their dogs and lock them up all the time in a kennel or drop them at a day care that doesn't do staffing levels the right way or do proper protocol and procedure. I feel like we're literally helping people. The financial conversion that comes with opening them is so good. The more Camp franchises that open, the more it becomes a known brand and the more demand there is. Before we opened, nobody even knew what doggy day care was and none of these dogs got to go enjoy themselves during the day. Now, it's the cultural norm."

—Jordan Murray, Pittsburgh, PA

"I love this business. I've owned a business before, so this was the next right step. I love the clients and dealing with the dogs. I love the freedom. I can't say we have a lot of free time, but with franchising we have a lot of people there to help us, and because we run our own business, we get to make our own decisions about our facility. We broke even in 9 months."

—Michelle Bryson, Cherry Hill, NJ

"I feel like they keep getting smarter and smarter with what they're doing. They're always looking at what the next new thing is and what can we do to

improve our business. I see Camp Bow Wow® as adding just more and more locations. It's amazing how many people are interested in this. It's amazing how many people call me to ask about it."

—Drew Detlefs, Baton Rouge, LA

"What I love most is the fact we can make a difference in the community. It allows us to do dog rescue work, and we love doing that. We also love doing staff development. Our employees tend to be young ladies and young men, and we love to foster their development and growth as adults. Most of our employees come to us at 18, 19 years old, sometimes in their early twenties. As they're with us, we see them grow into adults, full responsible members of the community. We've been able to take a few people with us and hold them by the hand and get them to a rewarding fulfilling career that they can have for a lifetime. We've seen people go from being kids under our tutelage to buying houses and getting married and having kids."

—Ann Roth, Detroit, MI

## MEET THE LEADERSHIP TEAM

### **Julie Turner**

#### **President, aka Leader of the Pack**

Julie, who started with Camp Bow Wow in 2014, provides the strategic leadership needed to help the brand grow and maintain its leadership in the Pet Care category. Julie's priorities are to amplify unit level revenue and profitability with her focus on new technologies and implementing operational efficiencies. Through her longstanding relationships with the franchise owners, Julie fosters a collaborative culture that leverages their insights to fuel innovation for the brand. Previous to her role as President, Julie served as Vice President of Marketing and provided strategic leadership for all brand marketing, communications and program development. Before Camp Bow Wow, Julie held various roles with Dish Network and Whirlpool, where she gained experience in many functions including business strategy, operations, product development and technology. She and her husband, Nathan, are not even remotely ashamed of how much they spoil their fur-baby Izzy, a golden-doodle.

### **Laura Clyncke**

#### **Vice President of Finance, aka Profit Pooch**

As the VP of Finance, Laura is responsible for the daily financial operations as well as the financial strategy of Camp Bow Wow®. Laura joined us in late 2016, bringing with her over 25 years as a successful consultant focusing in the areas of Process Improvements, Mergers and Acquisitions, Management Consulting and System Conversions. During her consulting tenure, she held various leadership positions and was regarded as a trusted

advisor to owners and executives. Her experience spans across many industries including Hi-Tech, Manufacturing, Service and Retail. Laura and her husband, Todd, have 2 sons, 2 daughters, 5 grandkids and Corona, their red-blue heeler mix grand-dog.

### **Todd Haavind**

#### **Vice President of Sales, aka Cash Hound**

Todd has been in franchise sales and development since 2002 and previously held leadership positions with Title Boxing Club, Dickey's Barbecue, Beeline Bikes, Mrs. Fields, TCBY and Quiznos. Todd brings a diversified industry background including quick service restaurants, retail services and fitness concepts. Todd lives in Denver, CO and enjoys the Colorado outdoors through skiing, hiking, fly fishing and biking. He also has a very energetic 3 year old Black Lab/Great Dane mix named Ella.

### **Steve Ricard**

#### **Vice President of Innovation & Technology, aka Tech Dog**

Steve has been with the company since the beginning, starting out as a Camp Counselor in 2001. His leadership immediately stood out, and during his tenure with Camp Bow Wow® he has held a variety of management positions including overseeing new business operations, both at the corporate level and at franchises across the country. Today he oversees the technology team, implements digital strategy and integrates new ideas across all departments. He led the development of Camp Bow Wow®'s point of sale system and quality assurance tools that are now shared by all franchises nationwide. Steve is proud of his history with Camp Bow Wow® and is always working toward the best possible experience for owners and their pets. He is the proud parent of a son, Noah, and the proud pet parent of a Great Dane and a Newfoundland.

## **Kim Morris**

### **General Counsel, aka Legal Beagle**

As the primary legal advisor for Camp Bow Wow®, Kim is in charge of the day-to-day legal affairs and operations for the brand. Day to day, Kim advises our executive leadership team on company strategies, franchise matters, intellectual property, strategic partnerships, real estate, complex business transactions and contracts. Kim originally joined Camp Bow Wow® as an intern while attending law school at the University of Colorado and is now our primary legal advisor. She and her husband, Tyler, have one daughter and a border collie-black lab mix named Willow.

## **Christy Barnes**

### **Marketing Director, aka Chief Barketer**

Since joining Camp Bow Wow in 2013, Christy has held a variety of positions on the marketing team and currently leads the marketing department. She is in charge of maintaining the overall brand image, spearheading numerous projects designed to improve national awareness, and developing and supporting all marketing communications and campaigns across the franchise system to drive unit-level growth. Christy is passionate about pups and marketing, but she also enjoys traveling, snowboarding and hiking in the beautiful state of Colorado.

## **Laurie Windler**

### **Vice President of Operations, aka Top Ops Dog**

Laurie joined the Camp Bow Wow® team in 2016, bringing with her over 30 years of entrepreneurial, franchise and management experience. She leads the Operations team, which includes franchise

support, training and corporate locations. Before joining Camp Bow Wow®, Laurie spent nine years with the Elements Massage franchise model. Laurie worked her way up the Elements system from Director of Franchise Support to Vice President of Operations, adding over 200 locations. Laurie and her husband, Carl, have two adult daughters and two grandchildren. Their family includes their Chihuahua, Gremlin, and grand-dogs Kenai (Husky-Malamute mix) and Makenna (MinPin).

## **Damien D'Emic**

### **Vice President of R&D and Analytics, aka Sled Dog**

Since joining Camp Bow Wow® in 2012, Damien has held several positions and is currently in charge of Analytics and R&D, which makes sure Camp Bow Wow® stays on the cutting edge of the industry. In the past he has also led the Operations Team. Prior to becoming the VP of Operations, Damien was Director of Business Analytics, where he developed tools to help franchisees grow their businesses and worked with locations individually to develop specific revenue growth strategies. Initially, Damien held the position of Sled Dog (Business Development Director) for the Northeast Region. Damien spent 11 years with Dunkin Donuts in Operations and Franchise Services. Damien and his wife, Deb, have a daughter, Amalia, and a Heinz 57 fur kid named Brooklyn who is part Tibetan Terrier, part Rottweiler, part Miniature Schnauzer and part "unknown."



## Jay Mihulka

### Vice President of Real Estate, aka Deal Dog

Jay, who has held a successful career in the commercial real estate industry since 1987, joined us in 2015. He is well-acquainted with the needs of a growing franchise system, having held positions with large corporations including Burger King, Papa John's and Save-A-Lot Grocery as well as smaller operations such as Bandana's Bar-B-Q and Boston Market. Jay has done business all across the country and has lived in Nebraska, Arizona, New Hampshire, Missouri and now Colorado. Jay is married with three children and a German shorthaired pointer named Jager.

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