



QATAR

PET SERVICES

INDUSTRY ANALYSIS

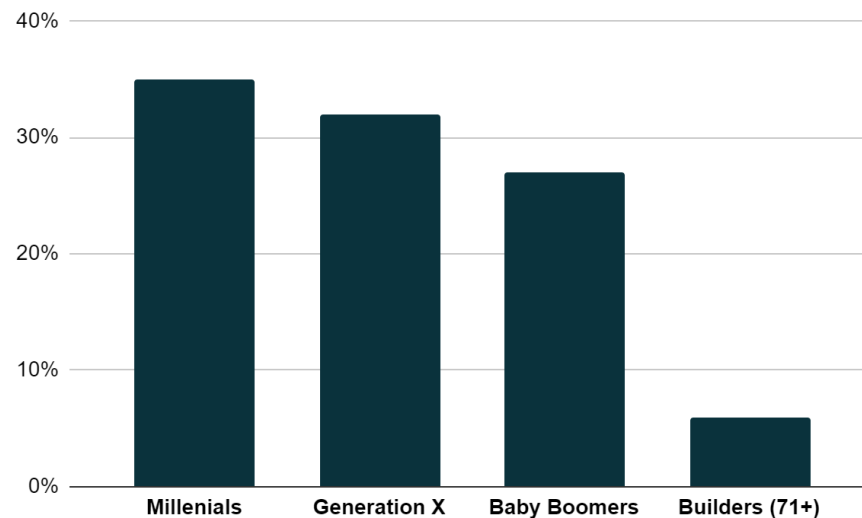
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Industry Overview

The market size for pet cat and dog services in Qatar is estimated to be close to QAR 260 million. The Qatar market is still at an early stage so market penetration will be easier for a newcomer than in more mature markets such as the USA. In addition, there is scope for product and service innovation in Qatar as most of the market players are offering similar services. There are very few market players in Qatar offering outdoor space which can be used as a playground for pets, so a newcomer offering such a facility can gain an edge. In many sections, we have used the USA as a reference as it is a more mature market relative to Qatar so trends of relatively mature markets are likely to be followed in Qatar.

Distributions of pet owners in the USA by age group¹:



¹ <https://commonthreadco.com/blogs/coachs-corner/pet-industry-trends-growth-ecommerce-marketing>

Problems & Opportunities

Lack of Strong Competitors

The pet service market across Qatar is still in its infancy and most of the existing market players are not very active in terms of promotional activities. Some examples of this include; lack of activities on YouTube, websites of most market players need improvements, and most of the market players do not have proper sales funnel in place. The majority of the websites do not offer an online booking facility with details of pricing, also the conversation mediums are mostly manual and most of them do not have chatbots that can offer instant answers to common queries. Most of the current market players in Qatar do not have an active Youtube channel and do not have proper content strategy in terms of guest posting and blogging. In addition, most of the websites do not offer newsletter signups. So, a new market player can exploit these weaknesses. Thus, there are plenty of opportunities for a newcomer to leverage these issues and gain a strong market position.

Large Number of Young Population

The majority (around 60%) of Qatar's population is within 34 years of age. It has been reported that younger individuals are more inclined towards having pets than the older population². So, the pet services market across Qatar has strong growth potential.

Lack of Product and Service Bundle Innovation

Most of the existing market players in Qatar are copy-pasting each other. There is scope for product diversification and innovation such as the introduction of pet insurance, video consultation with Vet., preventive healthcare subscription boxes, etc.

Increasing Sales on Online Channels

The pandemic has led to a rise in sales of pet-related products through online channels. In Qatar, existing market players are not ready to take advantage of this opportunity. A newcomer with a strong digital marketing plan will find it easier to get a foothold in Qatar than in other mature markets such as the USA.

²<https://www.forbes.com/sites/richardkestenbaum/2018/11/27/the-biggest-trends-in-the-pet-industry/?sh=70229439f099>

Mobile Grooming and Pet Care

This is a growing phenomenon across mature markets such as the USA, UAE, UK, etc. and this trend is likely to be followed in relatively less mature markets such as Qatar. The mobile pet care market has been reported to grow at 8.6% CAGR from 2021 to 2030³.

Target Market Segment

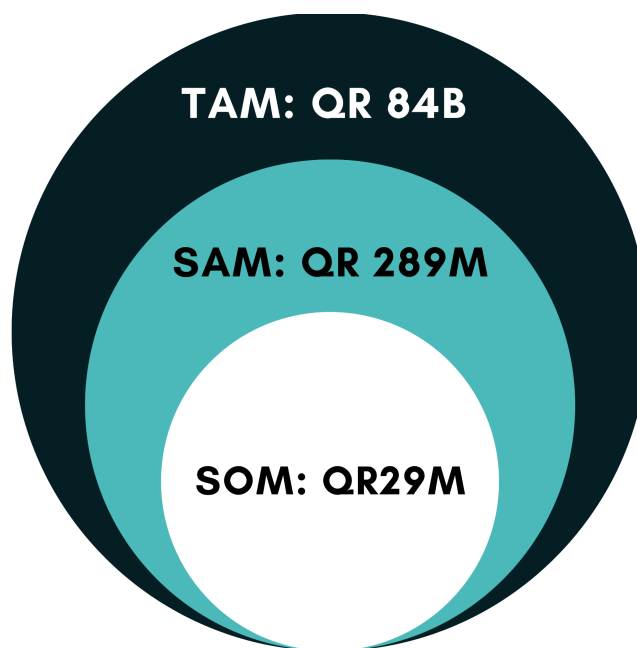
Geographic Segmentation

We plan to set up the facility in Doha.

Demographic Segmentation

The majority of the Qatari population consist of expats. Along with Qataris, we have considered expats from the US, UK, Canada, Saudi Arabia, and China as our target market as they belong to a higher income bracket relative to other expat groups such as South Asians. In addition, there are at least 10K people from the targeted countries in Qatar.

Market Size



³https://www.einnews.com/pr_news/591050518/mobile-pet-care-market-is-anticipated-to-register-around-8-56-cagr-from-2021-to-2030

TAM (Total Available Market)

We are considering the global pet services market size as the maximum potential and based on this assumption the **TAM is QAR 83.7 billion.**⁴

SAM (Serviceable Available Market)

Majority of the people living in Qatar are expats. So, for SAM we are considering citizens of high-income countries living in Qatar. Then we are considering % of pets relative to the total population. So, based on this we have estimated the number of pets these expats are likely to have while living in Qatar and we have also considered the number of pets belonging to Qatari citizens. Only in the case of Saudi Arabia, we have assumed the percentage of particular pets to be similar to Qatar as we could not obtain necessary information from secondary sources.

The following tables provide details of SAM calculation:

Targeted Nationalities in Qatar	Population of Origin Country	No. of Pet Dogs in Origin Country	as % of Total Population (citizens)
USA	335M	90M	26.8%
UK	69M	10M	14.8%
Canada	39M	8M	20%
Saudi Arabia	23M	1M	4%
China	1,451M	54M	3.7%
Qatar	0.3M	0.0135M	4.8%
Total	1,916M	163M	

567

⁴<https://www.grandviewresearch.com/industry-analysis/pet-services-market-report#:~:text=The%20global%20pet%20services%20market%20size%20was%20estimated%20at%20USD,USD%2024.9%20billion%20in%202022.>

⁵<https://www.statista.com/statistics/198100/dogs-in-the-united-states-since-2000/#:~:text=How%20many%20dogs%20are%20there,owned%20in%20the%20United%20States.>

⁶<https://www.statista.com/statistics/1015882/number-of-pet-cats-and-dogs-canada/#:~:text=Number%20of%20cats%20and%20dogs%20owned%20by%20Canadians%202020&text=In%20the%20same%20year%2C%20there.pet%20dogs%20in%20the%20country.>

⁷<https://www.statista.com/statistics/992408/china-number-of-dogs/#:~:text=In%202021%2C%20the%20number%20of.million%20in%20the%20previous%20year.>

Targeted Nationalities in Qatar	Population of Origin Country	No. of Pet Cats in Origin Country	as % of Total Population (citizens)
USA	335M	58M	17.3%
UK	69M	11M	15.7%
Canada	39M	8M	21%
Saudi Arabia	23M	2M	8.0%
China	1,451M	69M	4.7%
Qatar	0.3M	0.023M	8.2%
Total	1,916M	147M	

US dog owners spend around QAR 5.5K (per owner) on Dogs annually⁸ so we have considered this as our average annual revenue.

Targeted Nationalities in Qatar	Citizen Population in Qatar	No. of Pet Dogs	Average Annual Revenue	Market Size
USA	37,500	10,035		Rial55M
UK	21,000	3,118		Rial17M
Canada	9,000	1,800		Rial10M
Saudi Arabia	7,500	300	Rial5,500	Rial2M
China	9,000	337		Rial2M
Qatar	280,500	13,464		Rial74M
SAM of Pet Dogs				Rial160M

⁸<https://finmasters.com/pet-spending-statistics/#:~:text=U.S.%20pet%20owners%20reportedly%20spend,t o%20vet%20visits%20and%20grooming.>

US cat owners spend around QAR 3.6K (per owner) on cats annually⁹ so we have considered this as our average annual revenue.

Targeted Nationalities in Qatar	Citizen Population in Qatar	No. of Pet Cats	Average Annual Revenue	Market Size
USA	37,500	6,489		Rial23M
UK	21,000	3,301		Rial12M
Canada	9,000	1,894		Rial7M
Saudi Arabia	7,500	600	Rial3,600	Rial2M
China	9,000	425		Rial2M
Qatar	280,500	23,001		Rial83M
SAM of Pet Cats				Rial129M

The **total SAM** considering both pet dogs and cats is **QAR289 million**.

SOM (Serviceable Obtainable Market)

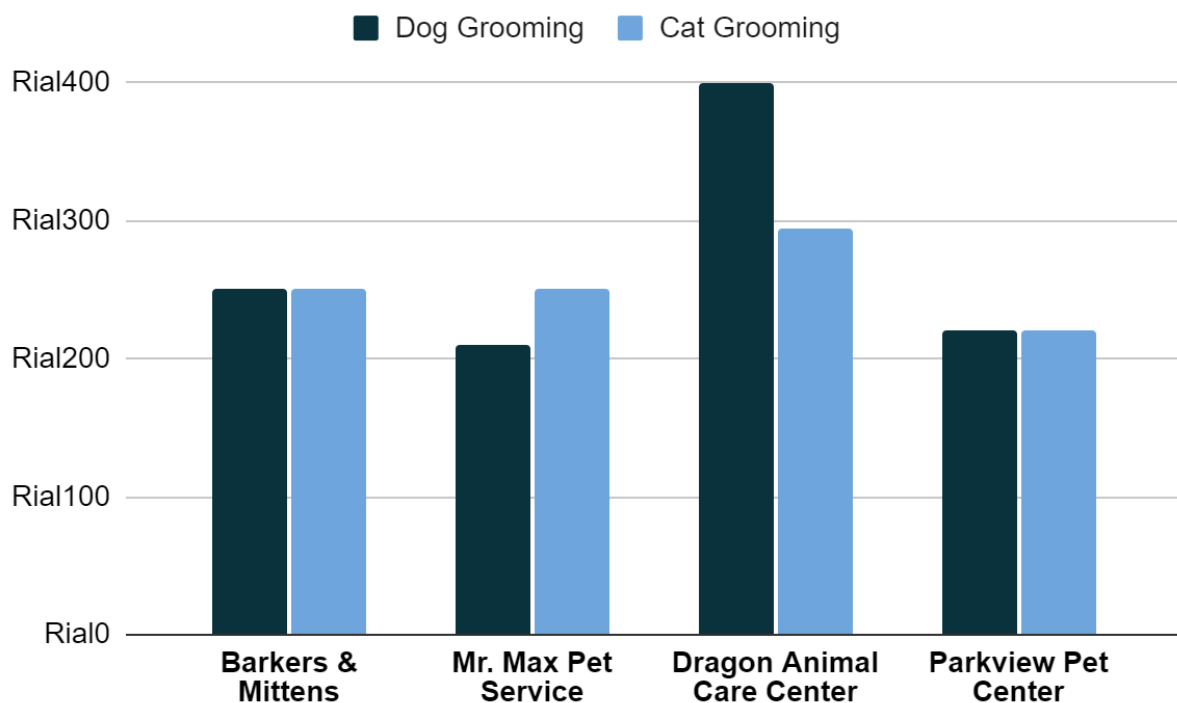
Based on the revenue projections and relative weaker competition in Qatar market we are targeting to achieve 10% of SAM. So our **SOM is QAR29 million**.

⁹<https://finmasters.com/pet-spending-statistics/#:~:text=U.S.%20pet%20owners%20reportedly%20spend,t o%20vet%20visits%20and%20grooming>.

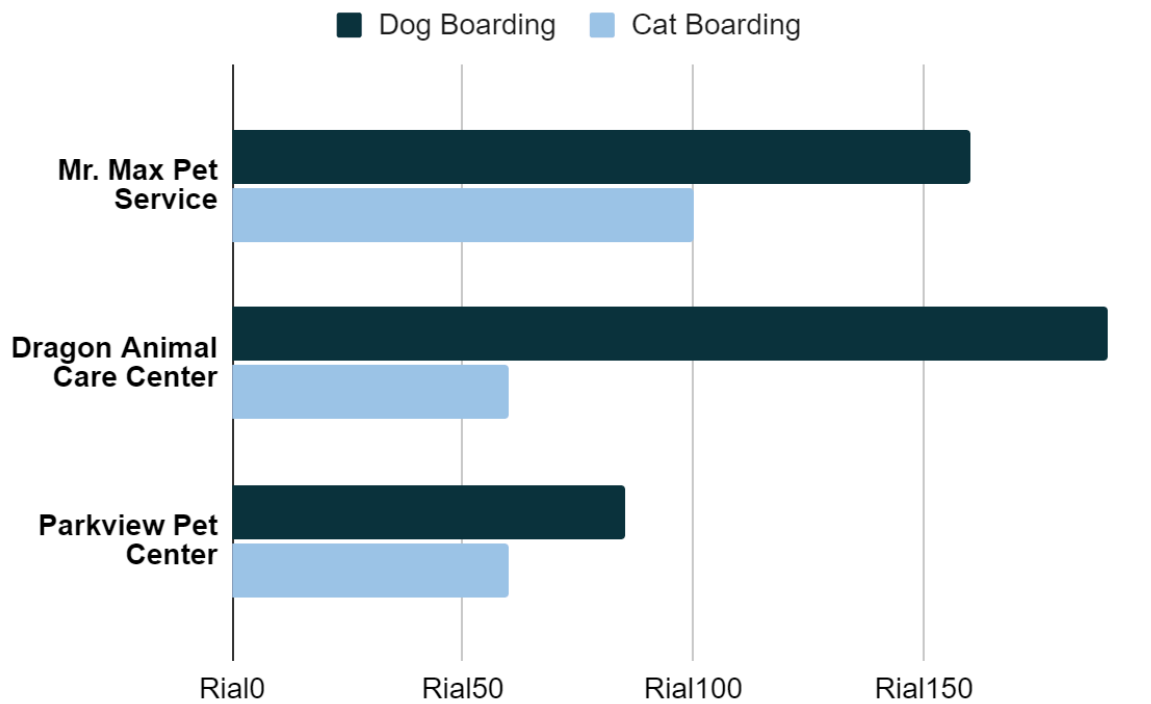
Competitive Landscape

Majority of the market players in Qatar is not very active in terms of online promotions. Also, in most cases communication with potential leads is managed through social media. There is a lack of an appropriate sales funnel that can lead to better conversion rates. This could be due to the lack of competition market players are not motivated to conduct aggressive promotions. All the market players in the list offer services for both dogs and cats and most of them are located in Doha. We have collected competitors' website data using Ubersuggest¹⁰. The number of monthly site visitors is an indication of competitors popularity and DA (Domain Authority) is an indication of content marketing and SEO strength.

Following graphs and charts are comparisons between major market players:



¹⁰ <https://neilpatel.com/ubersuggest/>



	Barkers & Mittens	Mr. Max Pet Service	Dragon Animal Care Center	Parkview Pet Center
Outdoor Facility	Yes	No	No	No
Dog Grooming Price	QAR 250 to 400	QAR 210 to 450	QAR 400 to 600	QAR 220 to 495
Cat Grooming Price	QAR 250 to 550	QAR 250 to 500	QAR 295 to 395	QAR 220 to 450
Dog Boarding Price	QAR 120	QAR 160 to 180	QAR 190	QAR 85 to 110
Cat Boarding Price	QAR 120	QAR 100 to 110	QAR 60	QAR 60
Dog Day Care Price	QAR 70	QAR 135 to 140	NA	QAR 50 to 60
Cat Daycare Price	NA	QAR 50 to 90	NA	QAR 50 to 60
Pet Taxi	QAR 30	NA	NA	QAR 50 to 100
Any Speciality	Outdoor facility	Swimming Facility		
Promotional Frequency	Low	Medium	High	Low

*NA means Not Available

The Fur Camp¹¹

It is located near Qanat Quartier in Doha and they are not very active in terms of promotions. They do not actively post on social media and their website has relatively small number of monthly visitors. They offer luxury pet boutiques, grooming, hotel, and veterinary services for both cats and dogs. Their website is not user-friendly and potential users have limited options to contact the customer support team. Their website has only 3 monthly visitors with a DA of 7. Their Instagram page has around 7.9K followers and 630 posts and their Facebook page has close to 7K followers.

The following table provides a list of their offerings:

Service Category	Sub- Category	Price
Grooming	Basic grooming for cats	QAR250
	Full grooming for cats	QAR330
	Small- Basic grooming for dogs	QAR240
	Large- Basic grooming for dogs	QAR320
	Small- Full grooming for dogs	QAR350
Boarding	Large- Full grooming for dogs	QAR420
	Cat hotel service/ night	QAR100

Mr. Max Pet Service¹²

They started during 2021 and offer grooming, boarding, and daycare facilities for cats and dogs. They have an indoor facility and they are trying to position themselves as a luxury pet services provider. They rely on video content, guest posting, and social media for promotions. Although it has been around 1 year, their website is not fully built and many CTA buttons on the site are inactive. In addition to usual pet services, their special offering involves Pet Party Packages which includes a party hosting service for pets and individuals. The Pet Party Packages are priced between QAR1.5K to QAR2.5K. Their website has almost 0 monthly visitors and has around 400 followers with 20 posts on Instagram and 2.6K followers on their Facebook page.

¹¹ <http://www.thefurrrcamp.com/>

¹² <https://mrmaxpetservice.com/>

The following table provides a list of their offerings:

Service Category	Sub- Category	Price
Grooming	Dog Small/ Medium- Diamond Package	QAR410
	Dog Large- Diamond Package	QAR450
	Dog Small/ Medium- Gold Package	QAR320
	Dog Large- Gold Package	QAR370
	Dog Small/ Medium- Silver Package	QAR210
	Dog Large- Silver Package	QAR270
	Cat- Diamond Package	QAR500
	Cat- Gold Package	QAR400
	Cat- Silver Package	QAR250
Boarding	Dogs-VIP boarding/ night	QAR180
	Dogs-Regular boarding/ night	QAR160
	Cats-VIP boarding/ night	QAR110
	Cats-Regular boarding/ night	QAR100
Daycare	VIP-Cats Full Daycare/ day	QAR90
	VIP- Cats Half Daycare/ day	QAR60
	Regular-Cats Full Daycare/ day	QAR80
	Regular- Cats Half Daycare/ day	QAR50

Fluffies¹³

This is an indoor facility and offers grooming, vet visits, dog training, daycare, pick-up & drop-off, and hotel services. Although they have a booking facility on their site, the site does not have traffic. Their social media posts mostly consist of products such as pet food rather than services. They are in a relatively weak position in terms of promotions as it is difficult to find them even using Google search. Their promotional activities are not integrated and do not have a proper sales funnel which can lead to more conversions. Their Instagram page has around 1.3K followers with 117 posts and their Facebook page has around 550 followers.

¹³ <https://fluffies.qa/>

The following table provides a list of their offerings:

Service Category	Sub- Category	Price
Grooming	Small Dog	QAR270
	Large Dog	QAR400
Training	Small Dog	QAR1,000
	Large Dog	QAR4,000
Boarding & Day Care	Dog/ night	QAR150
	Dog/ 6hrs	QAR70
	Dog/ 12 hrs	QAR120

Barkers & Mittens¹⁴

Their primary focus is on pet dogs. This is one of the few market players with an outdoor facility that is used as an off-leash dog park. The dog park provides ample space for dogs to play around which can be considered a USP for this market player. However, the park has been closed since May 2022. They offer pet grooming, luxury pet hotel, dog park, doggy daycare, dog training, pet photography, pet relocation, cat adventure playground, dog gym, and a retail store for pet food and other relevant items. They are not very active in terms of promotional activities. Their website has around 140 monthly visitors along with a DA of 6. Their Instagram page has around 4.5K followers with around 2.4K posts and their Facebook page has around 17.7K followers.

¹⁴ <https://barkersandmittens.com/>

The following table provides a list of their offerings:

Service Category	Sub- Category	Price
Grooming	Small- Organic Dog-Wash Treatment	QAR250
	Large- Organic Dog-Wash Treatment	QAR300
	Small- Full Dog-Groom Treatment	QAR350
	Large- Full Dog-Groom Treatment	QAR400
	Organic Cat-Wash Treatment	QAR250
	Full Cat-Groom Treatment	QAR350
	Luxury Cat-Pamper Treatment	QAR550
Doggy Daycare	10 Daycare: Indoor	QAR900
	10 Daycare: Outdoor	QAR1,200
	20 Daycare: Indoor	QAR1,600
	20 Daycare: Outdoor	QAR2,200
	30 Daycare: Indoor	QAR1,200
	30 Daycare: Outdoor	QAR3,000
	Pickup and drop off (price per day)	QAR30
	Indoor Daycare (price per day)	QAR70
	Outdoor Daycare (price per day)	QAR100

Canadian Veterinary Hospital¹⁵

They offer veterinary services, pet boarding, grooming and store for food, toys, etc. Their web interface is not user-friendly and they are not active on social media. Their communication channels for potential customers are not properly displayed and there is a lack of proper sales funnel to enhance conversion. Their customer support on social media does not respond on time and does not have a proper indication for other communication channels such as WhatsApp. They only communicate via phone calls. Their website has around 160 monthly visitors along with a DA of 18. Their Instagram page has around 2.3K followers with around 350 posts and their Facebook page has around 9.1K followers.

¹⁵ <https://canvethospital.com/>

Dragon Animal Care Center¹⁶

They are offering veterinary care, professional dog training, pet relocation, pet grooming, and pet hotel. In addition, they have a retail shop. They are more active in terms of promotional activities on social media than their competitors. Their website has 9 monthly site visitors along with a DA of 4 and their sales/ customer service team is very responsive. Their Instagram page has around 4.9K followers with close to 1K posts and their Facebook page has around 6.7K followers. They have a Youtube Channel but are not very active regarding video upload frequency.

The following table provides a list of their offerings:

Service Category	Sub- Category	Price
Grooming	Small Cats- Full Grooming	QAR295
	Medium Cats- Full Grooming	QAR335
	Large Cats- Full Grooming	QAR395
	Small Dogs- Full Grooming	QAR400
	Medium Dogs- Full Grooming	QAR450
	Large Dogs- Full Grooming	QAR475
	XL Dogs- Full Grooming	QAR550
	XXL Dogs- Full Grooming	QAR600
Boarding	Dog boarding/ night	QAR190
	Cat boarding/ night	QAR60

¹⁶ <https://www.dragonqatar.com/>

Parkview Pet Center¹⁷

They offer veterinary services, grooming, pet taxi, and pet hotel services. Their site is very outdated and not user-friendly and similar to other market players in this list they are not active on social media and other channels. Their website has around 40 monthly site visitors with a DA of 14. Their Facebook page has around 30.6K followers. They offer veterinary, grooming, pet taxi, and pet hotel services.

The following table provides a list of their offerings:

Service Category	Sub- Category	Price
Mobile Grooming	Full Grooming for cats	QAR385
	Partial groom for cats	QAR220
	Small- Full Grooming for dogs	QAR385
	Medium- Full Grooming for dogs	QAR440
	Large- Full Grooming for dogs	QAR495
	Small- Partial Grooming for dogs	QAR220
	Medium- Partial Grooming for dogs	QAR275
	Large- Partial Grooming for dogs	QAR330
In-house Grooming	Full groom for cats	QAR450
	Partial groom for cats	QAR300
	Small- Full Grooming for dogs	QAR350
	Medium- Full Grooming for dogs	QAR400
	Large- Full Grooming for dogs	QAR495
	Small- Partial Grooming for dogs	QAR200
	Medium- Partial Grooming for dogs	QAR250
	Large- Partial Grooming for dogs	QAR300
Pet Taxi	Pet taxi (in Doha)	QAR50
	Pet taxi (outside Doha)	QAR100
Boarding	Small Dog/ day	QAR85

¹⁷ <https://www.parkviewpetcenter.com/>

Medium Dog/ day	QAR95
Large Dog/ day	QAR110
Cats/ day	QAR60

The Veterinary Surgery (Doha Vets)¹⁸

Although they are primarily positioned as a vet clinic, they offer grooming and boarding services as well. They are relatively more active in terms of promotional activities than most of their competitors in this list. Their website has around 300 monthly site visitors along with a DA of 27. Their Instagram page has around 1.7K followers with close to 2K posts and their Facebook page has around 29.7K followers. They charge QAR60 for boarding, QAR400 for Cat Grooming, and QAR500 for dog grooming.

Vets 4 Pets¹⁹

Their website has 819K monthly site visitors along with a DA of 54. Their Instagram page has around 1.8K followers with close to 400 posts and their Facebook page has around 1.8K followers.

¹⁸ <https://dohavets.com/>

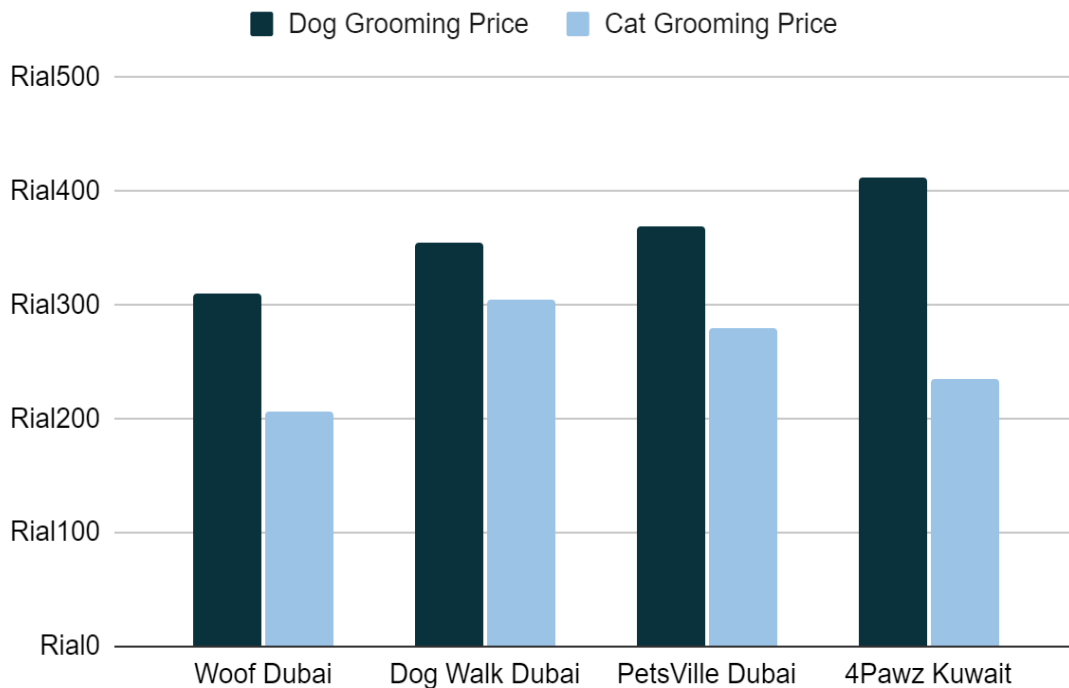
¹⁹ <https://www.vets4pets.com/>

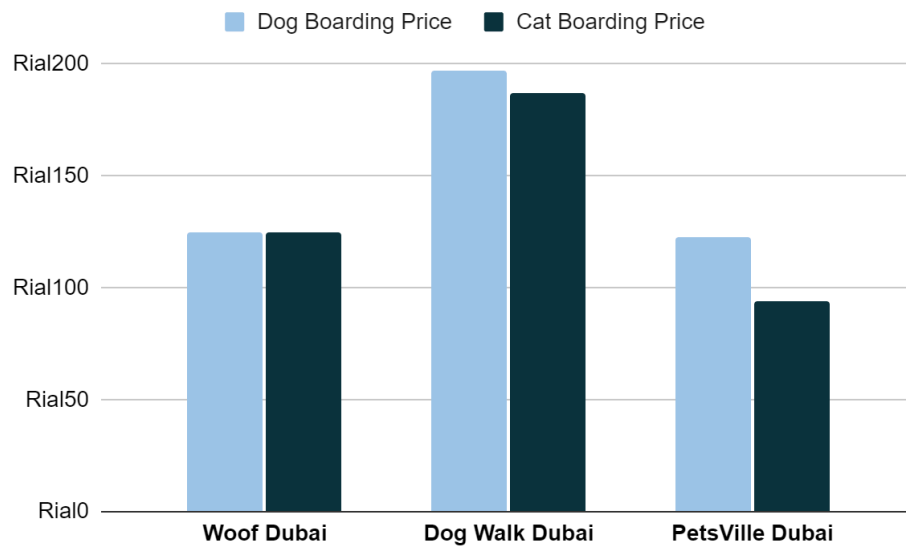
Indirect Competitors

Major competitors from other GCC countries are considered indirect competitors. It is important to note that amongst GCC countries UAE and in particular Dubai has the most mature market for pet services.

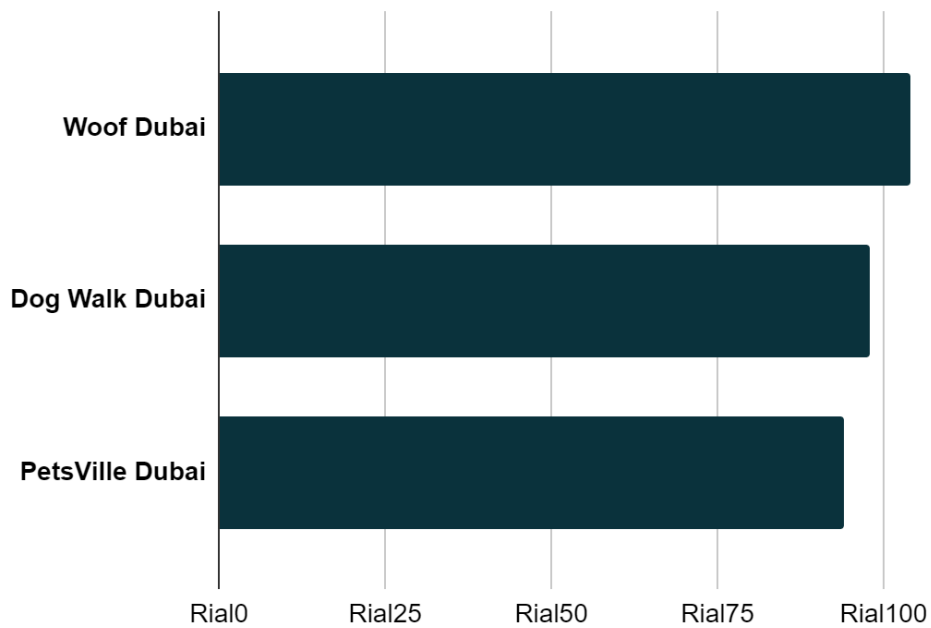
The following graphs and charts are comparisons between major market players:

	Woof Dubai	Dog Walk Dubai	PetsVille Dubai	4Pawz Kuwait
Dog Grooming Price	QAR 207 to 310	QAR 256 to 355	QAR 246 to 370	QAR 270 to 412
Cat Grooming Price	QAR 207	QAR 305	QAR 280	QAR 236
Dog Boarding Price	QAR 125	QAR 148 to 197	QAR 123	NA
Cat Boarding Price	QAR 125	QAR 108 to 187	QAR 94	QAR 94
Dog Day Care Price	QAR 104	QAR 98	QAR 94	NA
Cat Daycare Price	QAR 104	NA	NA	NA





Dog Day Care Prices:



Woof ²⁰

They are based in Dubai, UAE and are specialized for dogs. The frequency of posts is relatively high on social media and their website is user-friendly. In addition to pet services, they are also offering pet products such as food items, accessories, toys, etc. However, there are some flaws; they do not have any Youtube Channel and it is difficult to find a proper call-to-action button that can be used for booking services or communicating with a customer service agent. Their Instagram page has around 1K followers with around 470 posts and their Facebook page has around 2.7K followers. Their website has around 2.4K monthly site visitors with a DA of 13.

The following table provides a list of their offerings:

Service Category	Sub- Category	Price in QAR
Full Grooming	Small Dog	207
	Medium Dog	232
	Large Dog	310
	Cats	207
Day Care	Both dogs and cats	104
Boarding	Both dogs and cats	125

Dog Walk ²¹

They are based in Dubai, UAE and they serve both pet dogs and cat owners but most of their services are targeted toward dog owners. They have one of the best-looking and user-friendly sites amongst all the market players on this list. Important info related to prices, service description, CTA button for booking, and links to social media is clearly visible. Their online booking system is very well designed as well. They are very active on their Facebook and Instagram page. Their YouTube page has only 24 subscribers and there is a lot of scope for improvement. Their Instagram page has around 5.9K followers with around 1.8K posts and their Facebook page has around 6.5K followers. Their site has around 1.9K monthly visitors with a DA of 14.

²⁰ <https://www.woofdubai.ae/>

²¹ <https://www.dogwalkonline.com/>

The following table provides a list of their offerings:

Service Category	Sub- Category	Price in QAR
Full Grooming	Small Dog	256
	Medium Dog	305
	Large Dog	355
	Cats	305
Daycare	Dogs	98
Boarding	Dogs- Small Suite	148
	Dogs- Medium Suite	172
	Dogs- Large Suite	197
	Cats- Small Suite	108
	Cats- Large Suite	187

My Second Home²²

They are from Dubai and only offer services for dogs. One of their specialty is their large well designed indoor dog park facility which is a great playground for dogs even though it is indoors. They also have a user-friendly site like most market players from Dubai. However, their online booking system needs to be improved and the means of communication with customer support are not clearly indicated on their site. They are very active on social media but they have to improve their strategy for YouTube. Their Instagram page has around 6.6K followers with around 1.6K posts and their Facebook page has around 11K followers. Their website has around 4K monthly site visitors with a DA of 24.

²² <https://mysecondhomedubai.com/>

The following table provides a list of their offerings:

Service Category	Sub- Category	Price in QAR
Full Grooming	Small Dog	276
	Medium Dog	315
	Large Dog	355
	Extra Large Dog	374
Day Care	Dogs	108
Boarding- Dogs	Standard Suite	162
	Deluxe Suite	212
	Royal Suite	260
	Presidential Suite	345

Pets Ville²³

They offer services in Dubai for both cats and dogs. They are offering dog & cat boarding, daycare, training, grooming, and taxi services. Their site is well designed and user-friendly but the booking system has to be improved. Their Instagram page has around 8.2K followers with around 600 posts and their Facebook page has around 3.5K followers. Their website has around 2.6K monthly followers with a DA of 11.

The following table provides a list of their offerings:

Service Category	Sub- Category	Price in QAR
Full Grooming	Small Dog	246
	Medium Dog	295
	Large Dog	370
	Cats	280
Day Care	Dogs	93.5
Boarding	Dogs	123
	Cats	94

²³ <https://petsville.ae/>

4Pawz²⁴

It is from Kuwait and serves both cats and dogs. This is one of the best market players in terms of marketing strategy in the GCC region outside UAE. They offer both pet services and products. They offer boarding services only for cats and offer grooming services for both cats and dogs. Their site is user-friendly with a proper booking system but the site loading speed is slow, especially on the booking page. They are very active in terms of the frequency of posts on social media. It has around 270 monthly site visitors with a DA 8. Their Instagram page has around 14.4K followers with close to 600 posts and their Facebook page has close to 1.4K posts.

The following table provides a list of their offerings:

Service Category	Sub- Category	Price in QAR
Full Grooming	Small Dog	270
	Medium Dog	330
	Large Dog	412
	Cats	236
Boarding	Cats	94

²⁴ <https://www.4pawzkw.com/>

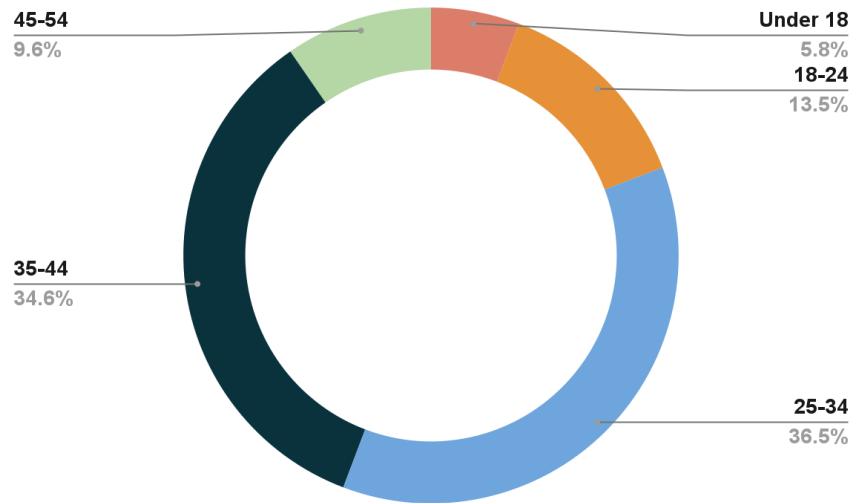
Porter's 5 Forces

- **Level of Competition:** Medium. We are targeting Qatar and there is a medium level of competition in terms of the number of competitors in the market.
- **Potential of New Entrants:** Medium. It requires significant investment to set up a pet service facility but many entrepreneurs in Qatar are capable of investing. Therefore we consider the potential for new entrants to be at a medium level.
- **Power of Suppliers:** Low. Primary suppliers are staff members taking care of pets and there is no shortage of staff members in Qatar. So, we have considered the power of suppliers to be low.
- **Power of Customers:** High. Customers have a good number of options in terms of the number of market players.
- **Threat of Substitutes:** Low. There is no substitute service for pet care.

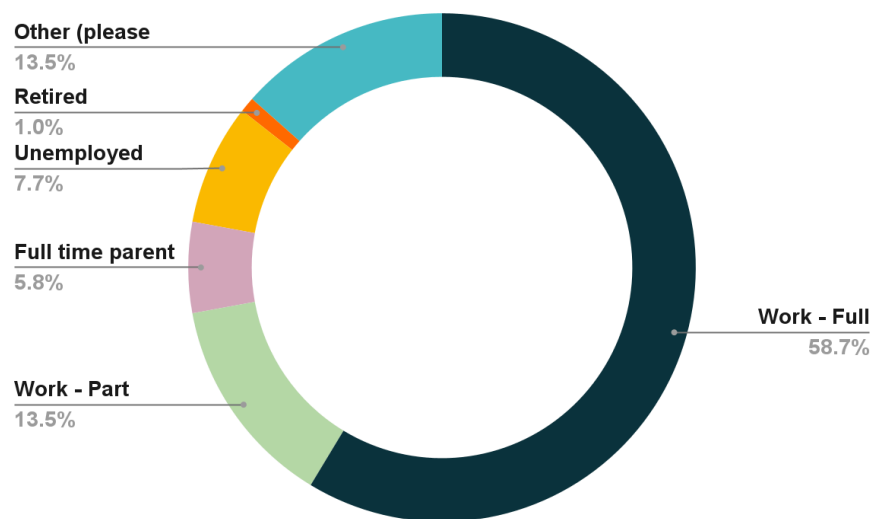
Survey Highlights

We conducted a survey on around 100 individuals in Qatar from different age groups and occupations. We will showcase some of the key responses from the survey.

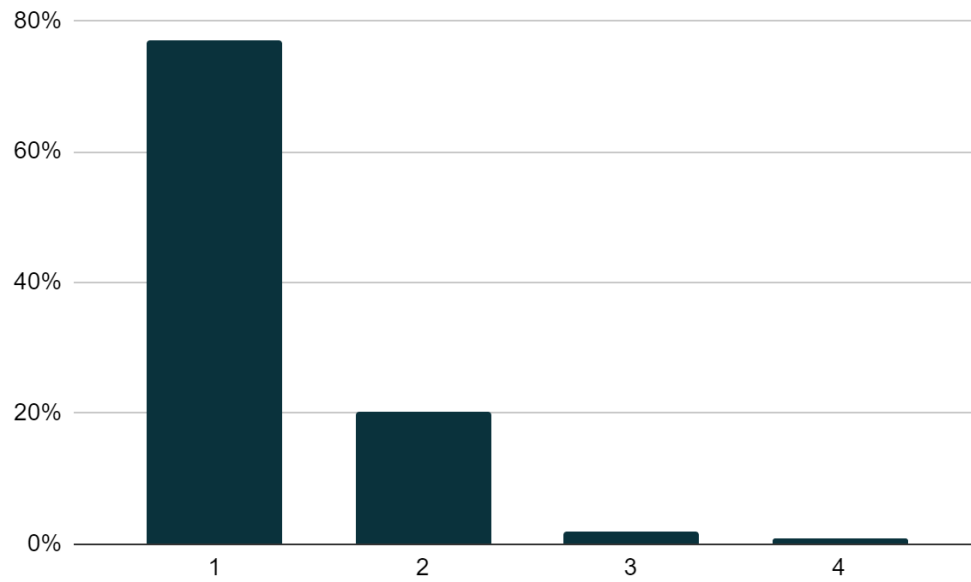
Age of Participants



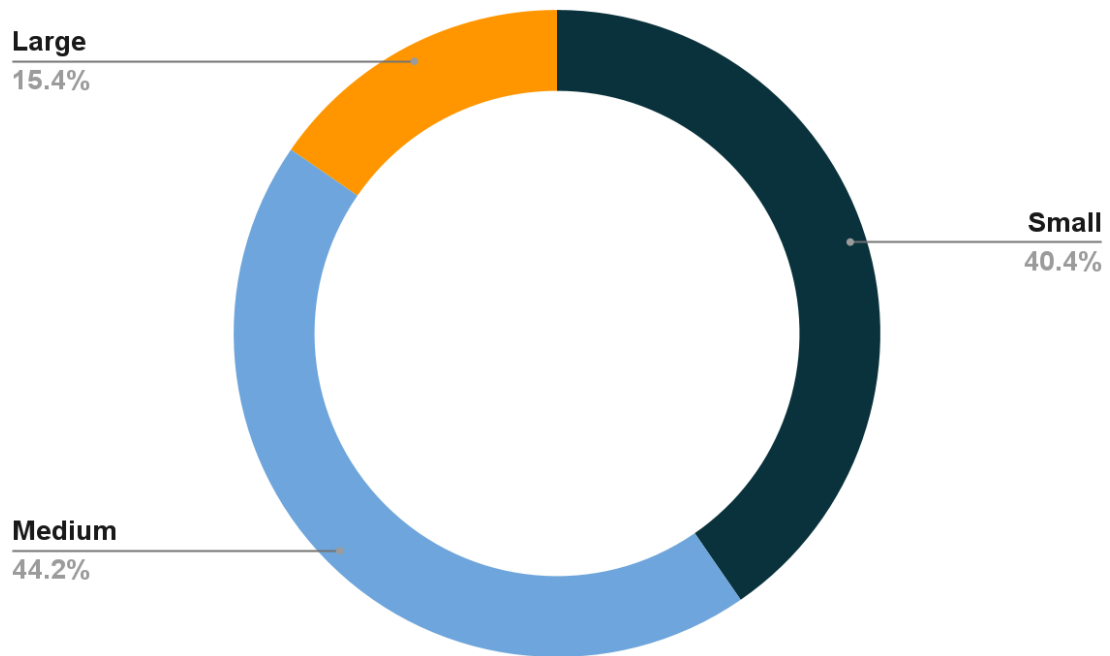
Occupation of Participants



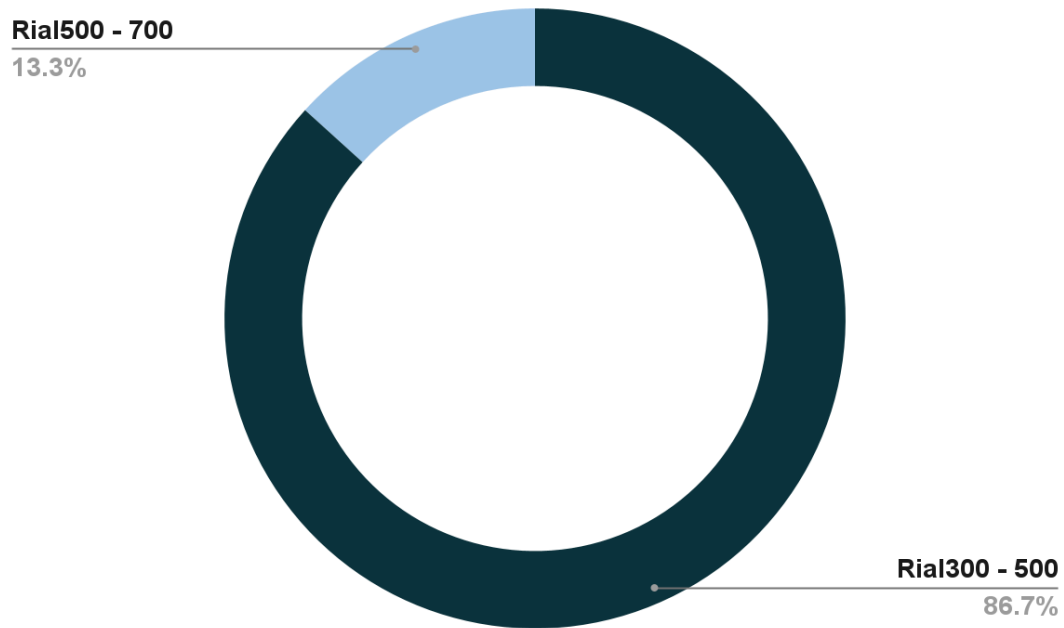
Number of Dogs



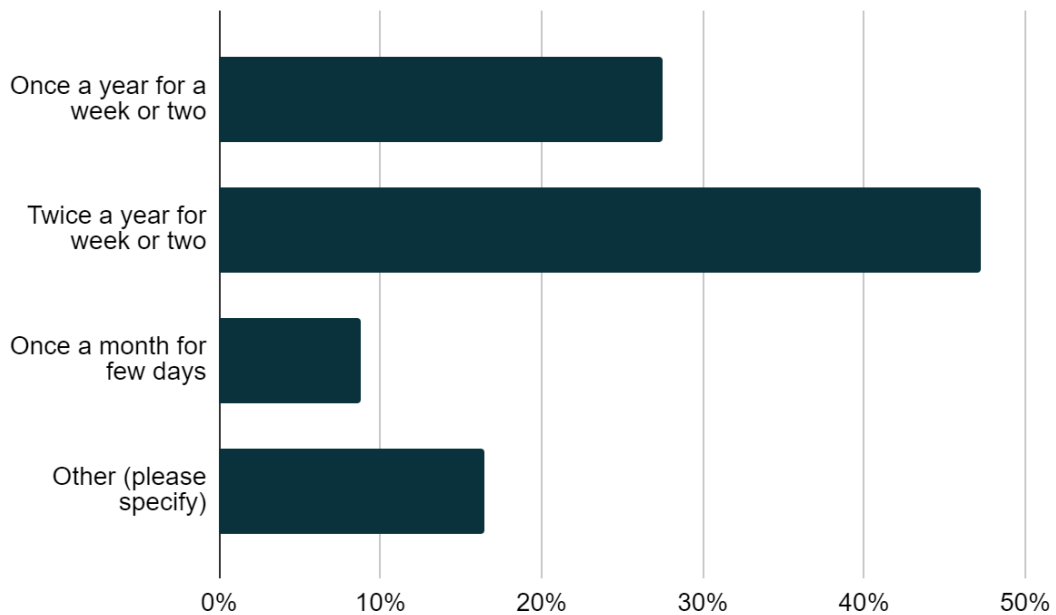
Dog Size



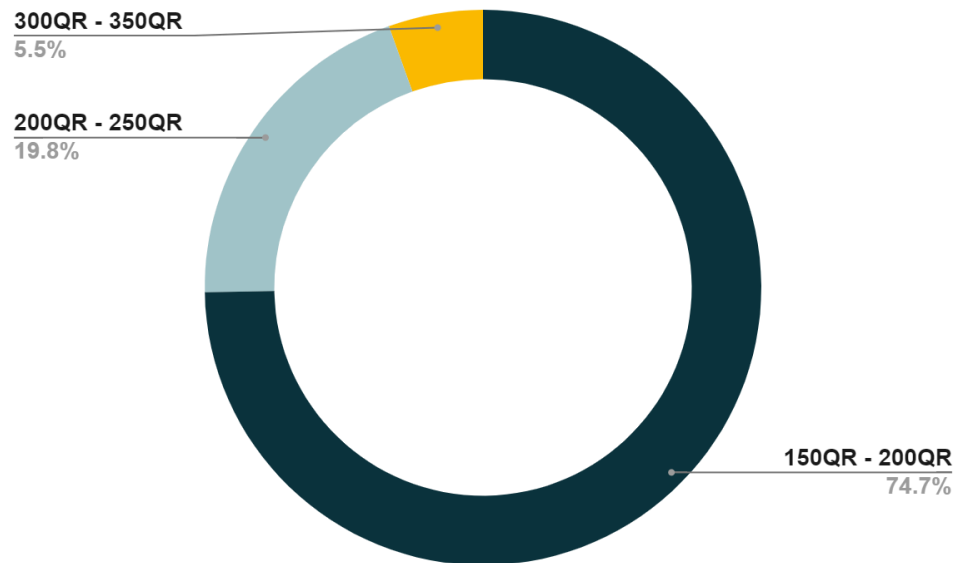
How much would you be willing to spend on a doggy daycare weekly per dog?



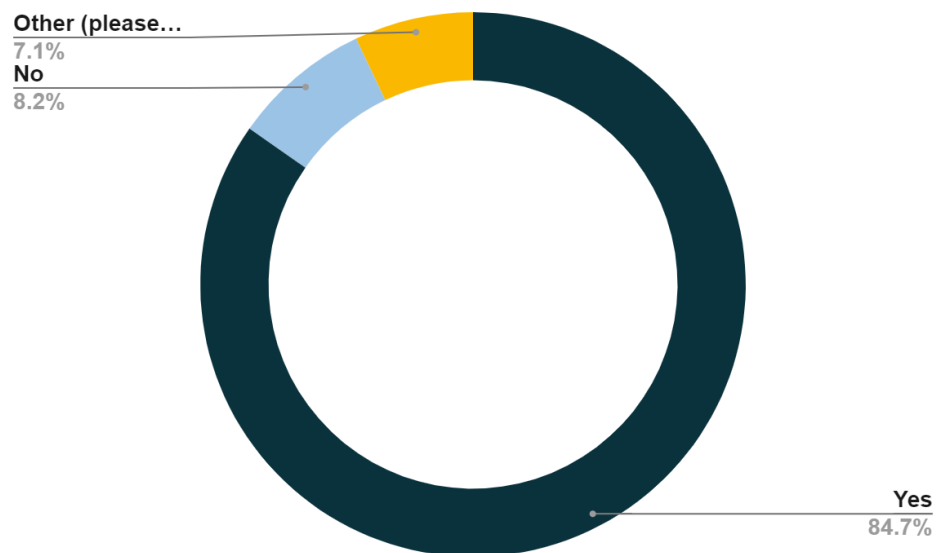
How often would you use dog boarding?



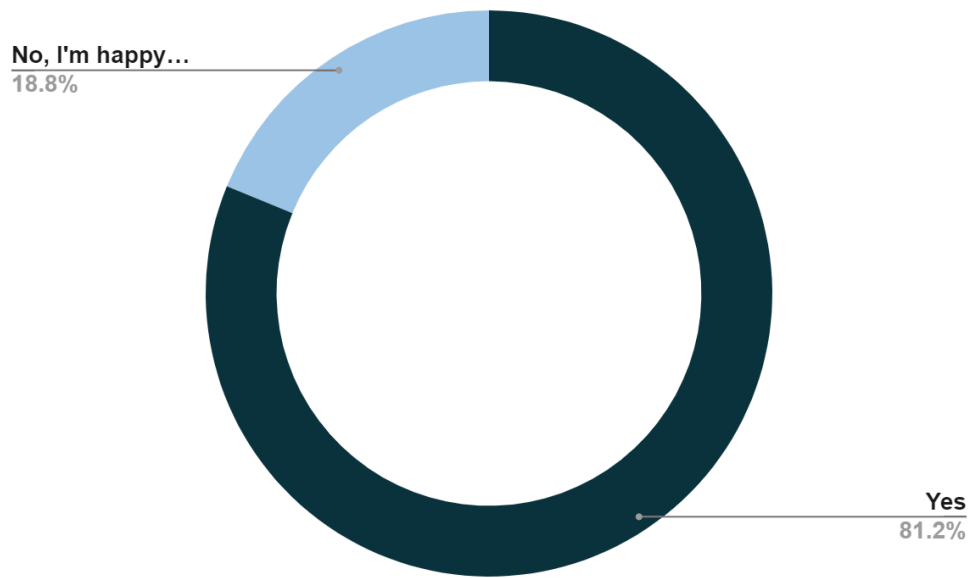
Roughly how much would you spend onboarding for one night per dog?



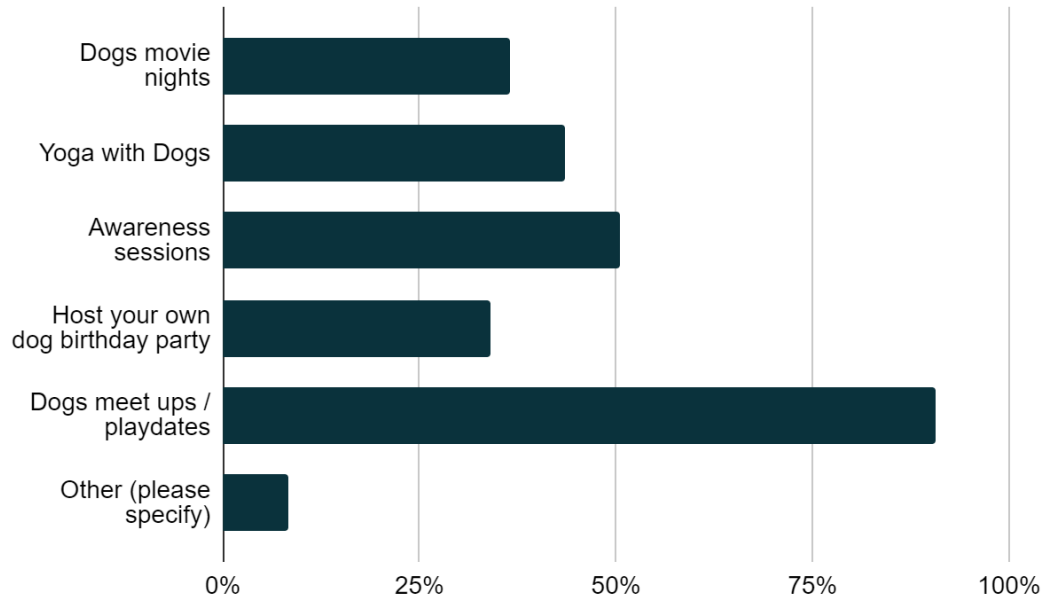
Would you be interested in spending your day in an indoor or outdoor playground with your dog(s) with an entry fee of (35-50QAR)?



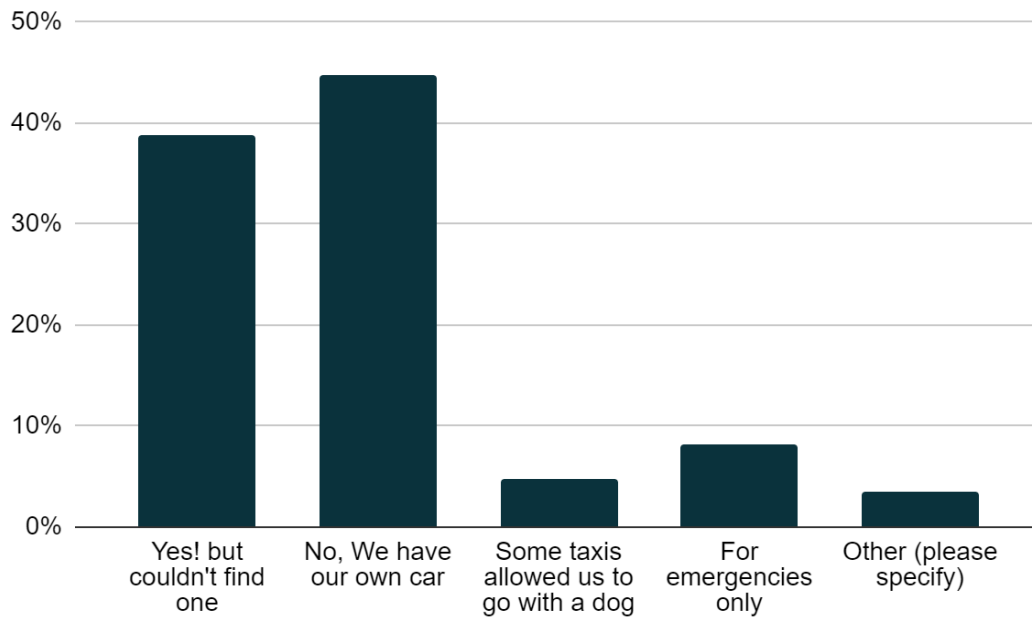
Would you be interested in Grooming services in your doggy daycare place?



Would you be interested in any of the below?



Have you ever needed a pet-friendly taxi?



The End