



November 27, 2012

Pet Adoption & Spay/Neuter: Understanding Public Perceptions by the Numbers

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Agenda

- Background & Objectives
- Methodology
- Public Awareness of Pet Homelessness
- Pet Acquisition
 - Barriers to Adoption
 - Drivers of Adoption
- Spay/Neuter Trends
 - Barriers to Spay/Neuter
 - Drivers of Spay/Neuter
- Key Takeaways

Background/Objectives



Background

In early 2009, PetSmart Charities commissioned Ipsos Marketing to conduct an attitude, usage and barriers research study in order to understand and quantify current awareness and perceptions of both pet adoptions and spaying/neutering of pets, as well as to understand current barriers to using adoption and spay/neuter programs. PetSmart Charities commissioned Ipsos Marketing to repeat the 2009 research study in late 2011 to determine how attitudes and perceptions of these two topics have changed since the initial study was conducted.

Objectives

- Determine whether awareness of pet adoption and spay/neuter issues in the U.S. has increased since the initial study, and whether consumers have a better understanding of the issues based on communication and/or messaging on these topics.
- Gauge whether perceptions of and attitudes toward pet adoption and spay/neutering issues have changed over time and whether they differ by region in the U.S.
- Identify the drivers for using pet adoption and spay/neuter services.
- Determine the barriers to using pet adoption and spay/neuter services.
- Determine whether and how any of the above differ when it comes to dogs v. cats.

Methodology



How?

- Ipsos Marketing Online self-administered interview
- Among:
 - Members of the Ipsos i-Say panel
- Survey length: 30 minutes on average

When?

- Data Collection: November 3, 2011 to November 11, 2011

Who?

- Nationally Representative Sample of ~n=2000 completes were obtained. Qualified respondents were:
 - 18+ years of age, 50% Male/50% Female
- Augment Group of Past 12 Month Recently Acquired Dog or Cat Owners were obtained to collect a total of n=1000 (Rep + Augment) completes. Qualified respondents were:
 - 18+ years of age
 - Acquired a dog or cat in the past 12 months
 - Are involved in decision making for dog/cat



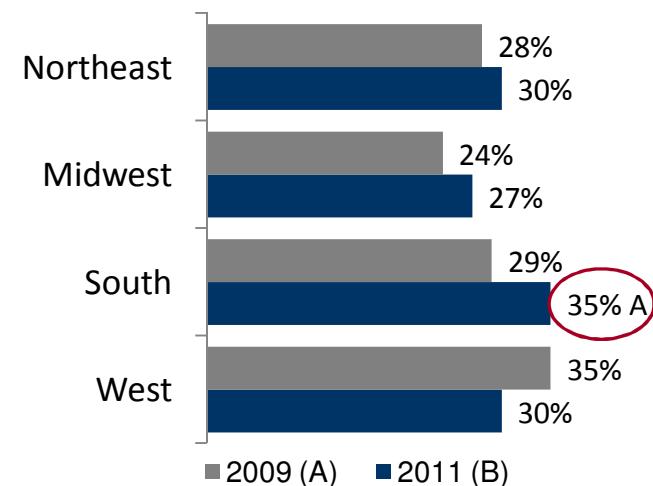
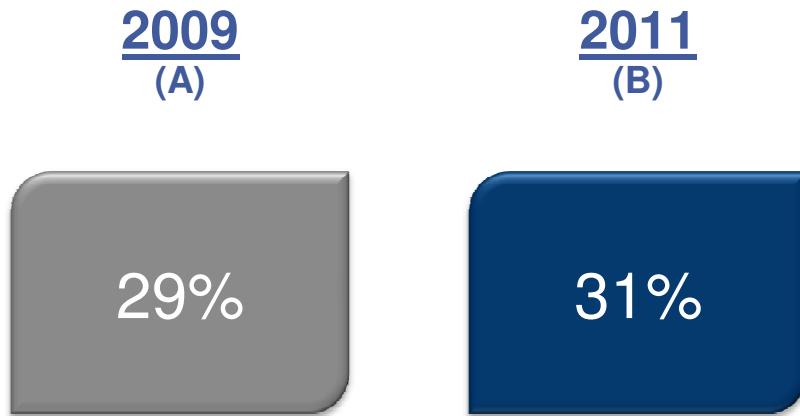
PUBLIC AWARENESS OF PET HOMELESSNESS

Knowledge of Dog & Cat Homelessness Among General Population



Overall Awareness Levels are Consistent with 2009, with an Increase in the South

Knowledge of Issue (Top 3 Box Rating)



Q.1 Listed below are several social issues that individuals and various organizations provide support for through donations, informational messages, and other services please indicate how much you feel you know about each of these issues?

Note: Letters indicate statistical differences at the 90% confidence level

Base: Total Rep (2009: n=2000, 2011: n=2062)

Research Conducted by Ipsos Marketing

Seen/Heard Pet Homelessness Campaigns Among General Population



Awareness of Campaigns has Increased in the Northeast

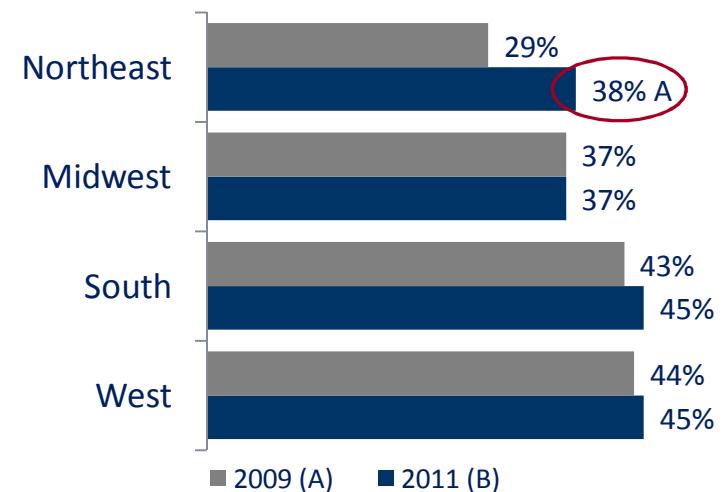
Seen/Heard Pet Homelessness Campaigns

**2009
(A)**

39%

**2011
(B)**

42%



Q.3 Please indicate which issues you have seen or heard any campaigns for lately that provide information and/or ask for support.

Note: Letters indicate statistical differences at the 90% confidence level

Base: Total Rep (2009: n=2000, 2011: n=2062)

Research Conducted by Ipsos Marketing

Pet Homelessness Issue – Concern & Support Among General Population



While Expressed Concern has Increased, Support Remains Consistent with 2009

Level of Concern for Issue (Top 3 Box Rating)

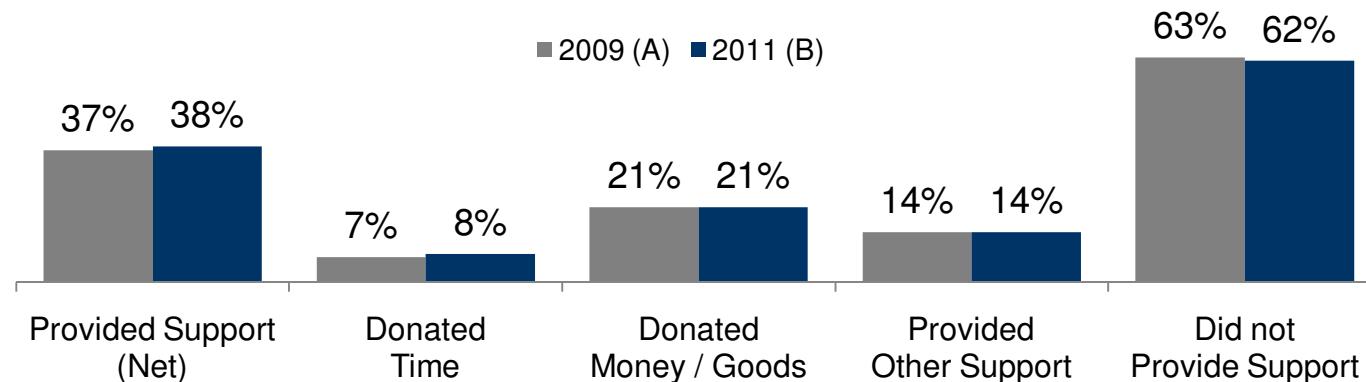
2009
(A)

35%

2011
(B)

39% A

Provided Support for Issue



Q.2 Now thinking about these same issues, how concerned are you about each of the problems listed below?

Q.5 Please indicate what level of support, if any, you have provided for each of the social issues listed below in the past 12 months.

Note: Letters indicate statistical differences at the 90% confidence level

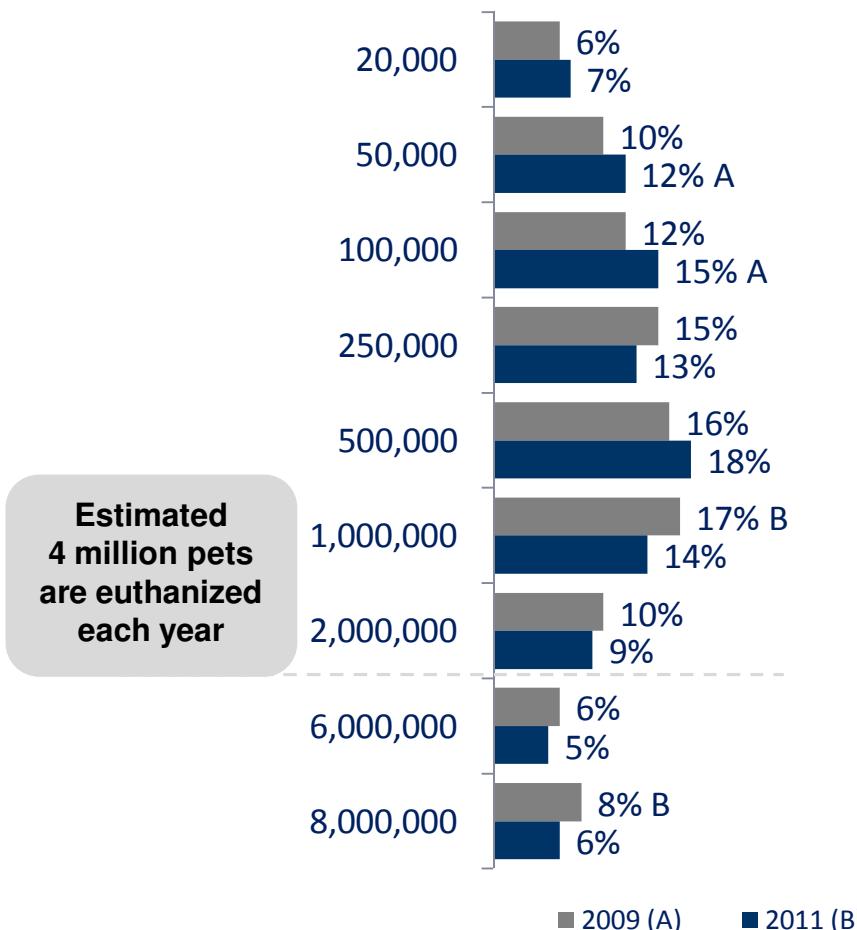
Base: Total Rep (2009: n=2000, 2011: n=2062)

Research Conducted by Ipsos Marketing

Perception of Number of Pets Euthanized Among Dog/Cat Owners



Estimates of the Number of Pets Euthanized Still Fall Far Short of the Reality



88% of respondents underestimate the number of pets euthanized annually

Average Estimate

2009

1.5
million

2011

1.2
million



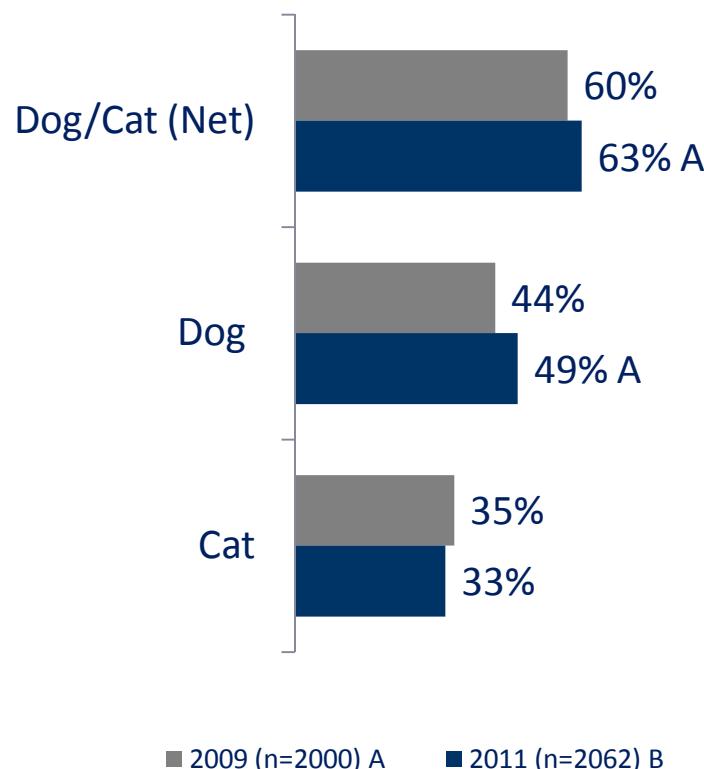
PET ACQUISITION

Dog/Cat Ownership & Acquisition Source



Acquisition Sources Vary Widely by Species, and Speak to Different Needs

Dog/Cat Ownership - Total Rep -



Where Acquired Dog/Cat - Past 12 Month Recently Acquired Dog/Cat Owners -

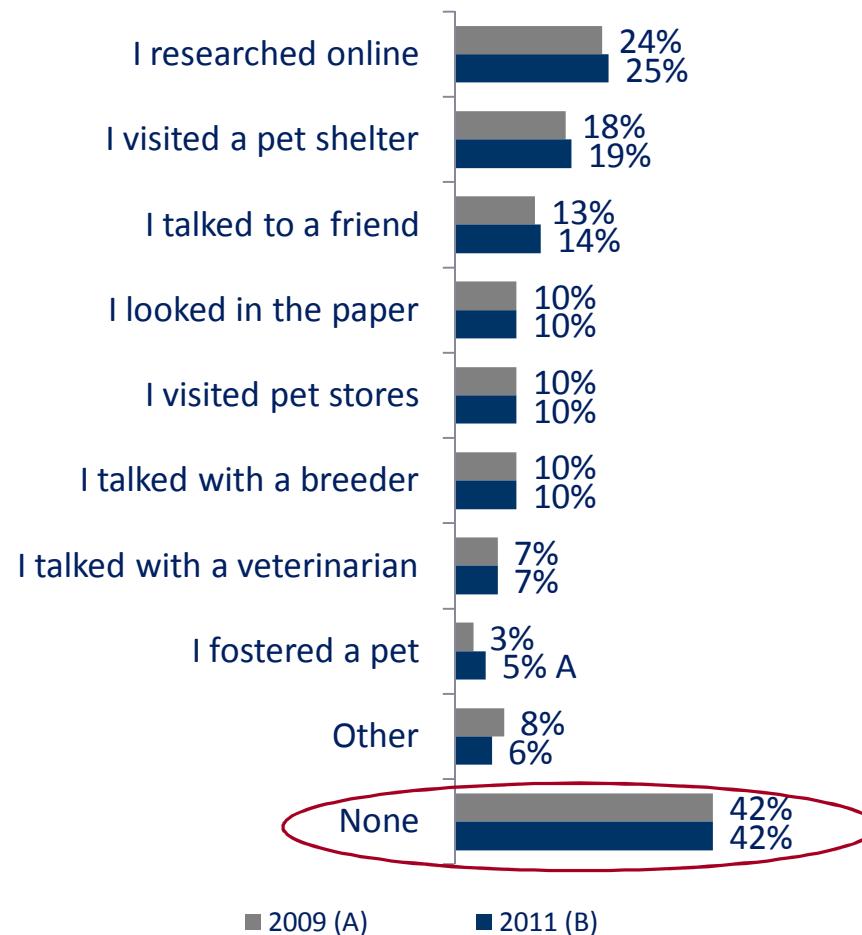
	Most Recently Acquired Dog Owners		Most Recently Acquired Cat Owners	
	2009 (n=561)	2011 (n=508)	2009 (n=467)	2011 (n=437)
Family member/friend	25%	27%	23%	21%
Took in a stray	8%	8%	37%	33%
Pet adoption org/ shelter	20%	19%	18%	18%
From Own Pet's Litter	3%	3%	7%	8%
Purebred breeder	17%	17%	2%	2%

Q.10 Which, if any, of the following do you currently have
 Q.19 Where did you acquire your pet(s) from?
 Note: Letters indicate statistical differences at the 90% confidence level
 Research Conducted by Ipsos Marketing

Actions Taken Prior to Acquiring Pet Among Past 12 Month Recently Acquired Dog/Cat Owners



Most Frequently, Pet Owners Say that They did None of the Following Before Acquiring



Q.22 What, if any, of the following did you do before acquiring pet?
Note: Letters indicate statistical differences at the 90% confidence level
Base: (2009: n=1028, 2011: n=944)
Research Conducted by Ipsos Marketing



BARRIERS TO ADOPTION

Reasons Did Not Adopt

Among Recently Acquired Dog/Cat Owners (Non-Adopters)



Top Barriers to Adoption Continue to be Beliefs that the Type of Dog/Cat Wanted Cannot be Obtained from an Adoption Source



Quotes from non-adopters:

"I wanted a pet that my grandkids could train and grow up with and that would be a family pet." - Purchased from Breeder

"My friend knew I had always wanted a small dog and when hers had the litter she offered one to me." - Acquired from Friend

Q.27 What were the reasons you chose not to adopt your [cat/dog]?

Note: Letters indicate statistical differences at the 90% confidence level

Base: P12M Recently Acquired Dog/Cat Owners who chose not to adopt pet most recently acquired (2009: n=246, 2011: n=211)

Research Conducted by Ipsos Marketing

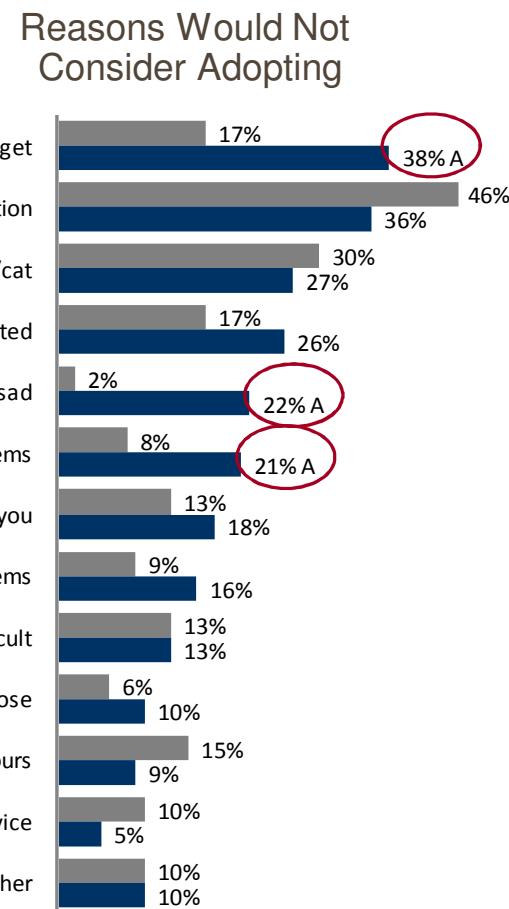
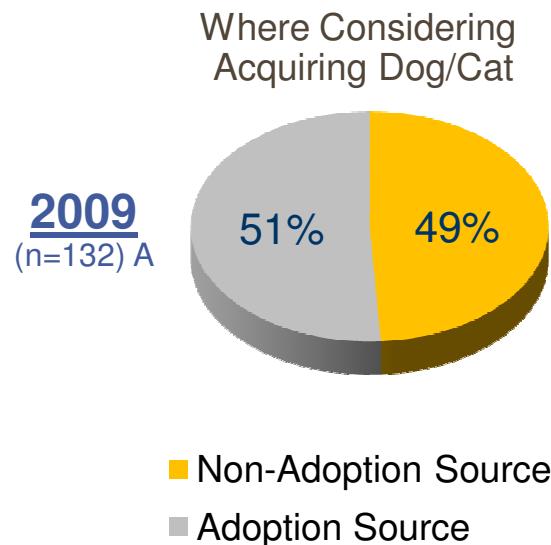
Note: Base represents past 12 month recently acquired dog/cat owners whose most recently acquired pet was obtained through one of the following sources:

- A local pet store that sells pets
- Pet supply store
- Purebred breeder
- Newspaper/classified ad/other listing to purchase a pet
- Internet/online listing/discussion board to purchase a pet
- Other non-adoption source

Reasons Would Not Adopt in Future Among Dog/Cat Considerers (Non-owners)



While More People Say they Would Consider Adopting a Pet, Significant Damage has also been Done to Public Perceptions of Adoptable Pets – in Just Two Years



Q.19A Where would you consider acquiring your pet(s)?

Q.27A What were the reasons you would chose not to adopt your [cat/dog]?

Note: Letters indicate statistical differences at the 90% confidence level

Base: Total Dog/Cat Considerers/Non-Owners

Research Conducted by Ipsos Marketing

Perceptions Toward Pet Acquisition Sources Among Past 12 Month Recently Acquired Dog/Cat Owners



Versus the 2009 Survey, 2011 Results Show that Perceptions of Breeders are Declining, as are Perceptions of Animal Control Agencies and Pet Stores

	2011				
	Adoption Organization /Shelter	Pet Store	Puppy Mill	Breeder	Local Animal Control
Help find homes for animals	76%	14%	3%	10%	35%
It helps rescue/save animals	74%	7%	3%	5%	45%
Are against animal cruelty	72%	24%	5%	26%	44%
Is a place I would look if I was considering acquiring a dog/cat	66%	16%	3%	26%	33%
Helps control pet overpopulation	62%	6%	3%	5%	53%
The animals are well cared for at this source	60%	25%	4%	36%	23%
Are knowledgeable	58%	30%	4%	41%	26%
Has knowledgeable staff	58%	30%	4%	29%	27%
I see a lot of positive stories in the news about this source/organization	57%	9%	2%	7%	17%
Would help me find a pet that is best suited for my lifestyle	54%	18%	3%	20%	17%
Are low-priced	51%	6%	8%	3%	34%
Good source if I needed information on a pet I'm considering acquiring	49%	27%	3%	33%	18%
Helps minimize the amount of stray animals in my neighborhood	48%	4%	2%	2%	62%
They have limited hours	39%	28%	7%	11%	38%
It is depressing/do not like to go there	18%	14%	46%	8%	32%
Are expensive	9%	51%	24%	64%	6%
The animals are often unhealthy/sick	8%	17%	60%	8%	17%
It is unsanitary	7%	9%	56%	6%	12%
I see a lot of negative stories in the news about this source/organization	6%	15%	64%	13%	9%
I believe this organization is unnecessary	5%	9%	58%	10%	5%
None of the above	8%	12%	12%	12%	11%

Significantly higher than 2009 at the 90% confidence level.

Significantly lower than 2009 at the 90% confidence level.



DRIVERS OF PET ADOPTION

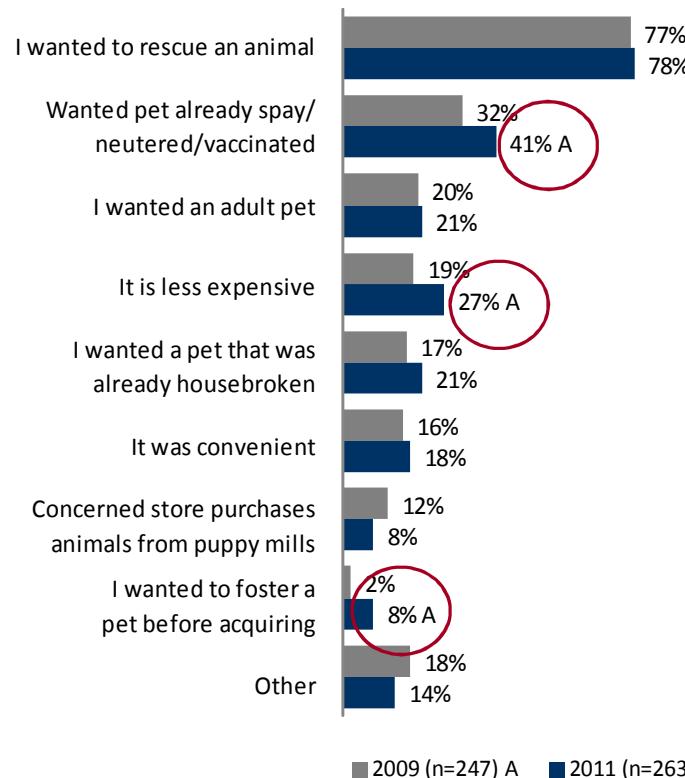
Reasons for Adopting/Wanting to Adopt a Pet



Pre-altered Pets, Cost Savings, and Desire to Foster are Growing Drivers of Adoption

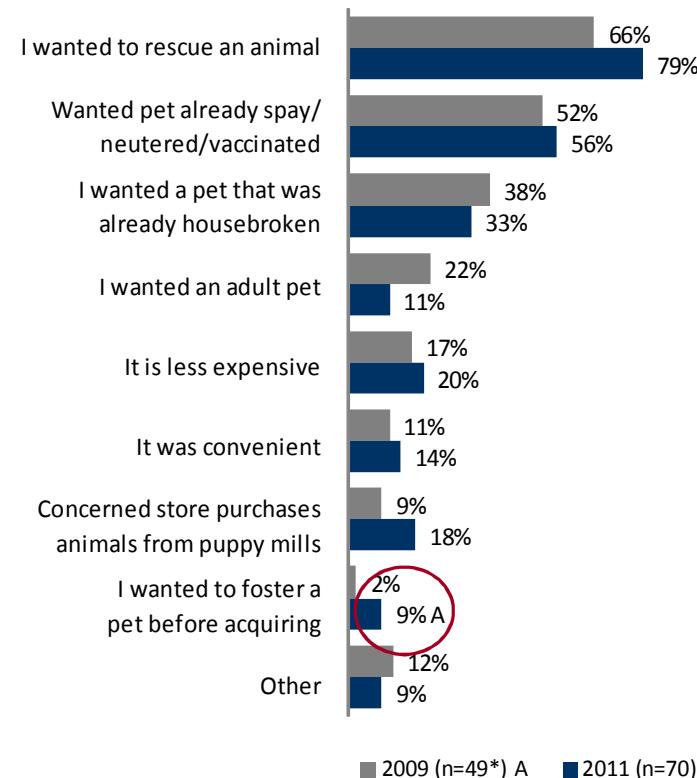
Reasons for Adopting

- Total P12M Recently Acquired Dog/Cat Owners who Adopted -



Reasons for Wanting to Adopt

- Total Dog/Cat Considerers (non-owners) who would Adopt -



Q.29/29A What were the reasons you chose to adopt or wanted to adopt dog/cat?
 Note: Letters indicate statistical differences at the 90% confidence level
 Research Conducted by Ipsos Marketing

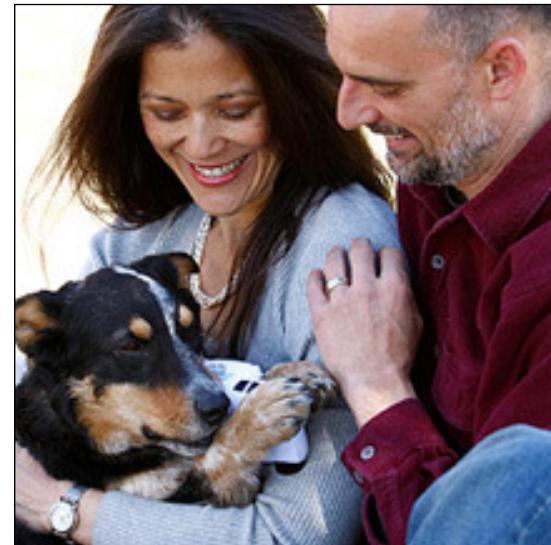
Reasons Acquired Pet at Pet Adoption Organization/Shelter

Among Past 12 Month Recent Dog and Cat Adopters



The Desire to Save an Animal is Still the Strongest Expressed Driver of Adoption, but the Frequency with which Online Pictures of Adoptable Pets are Cited is Noteworthy

	2009 (n=192) A	2011 (n=175) B
Wanted to save an animal	84%	84%
Saw an animal's picture online	19%	21%
It was the least expensive	16%	14%
It was the most reputable	13%	15%
It was most convenient	11%	12%
Recommended by someone I know	6%	10%
Other	17%	16%



Motivating Factors to Adopt Among Past 12 Month Recent Acquirers Who Did Not Adopt Their Pet



Based on Stated Barriers to Adoption, the Following Motivators Specifically Address Concerns about the Health, Temperament, and Breed/Type of Adoptable Pets

Pet Adoption Motivators:

	2009 (n=886) A	2011 (n=803) B
Adopting a pet saves a life and gives you a lifelong companion	74%	73%
Adopted pets can be some of the best companion animals	72%	72%
Millions of dogs and cats are euthanized (put to sleep) every year because they do not have homes.	68%	72% A
In many shelters, dogs, cats, puppies and kittens who are healthy and friendly must be euthanized because the shelter has run out of space to house them.	68%	71%
Euthanasia is the No. 1 killer of healthy pets in the United States. No other disease or medical condition results in more pet deaths.	67%	69%
Many shelters pre-screen dogs and cats for health and temperament before putting them up for adoption.	66%	67%
Many dogs and cats in shelters or with rescue groups are already well trained, vaccinated and spayed or neutered.	68%	66%
The adoption fee for homeless pets is a fraction of the cost for a dog or cat from a breeder or pet store.	66%	66%
Adoption shelters offer a wide range of animals to select from including both mixed and purebreds	63%	64%
In some cases, dogs and cats are neglected at high-volume, low-quality facilities called 'puppy mills' where they are bred for sale.	61%	61%
Among the top reasons dogs and cats are surrendered to shelters or rescue groups are 'moving' and 'cost' and not because of a health or behavior problem.	59%	60%
Millions of the dogs and cats who end up in shelters or with rescue groups every year are purebred.	53%	55%

 **Messaging that addresses the top barriers for adoption among recently acquired dog/cat owners who have not adopted any of their pets**



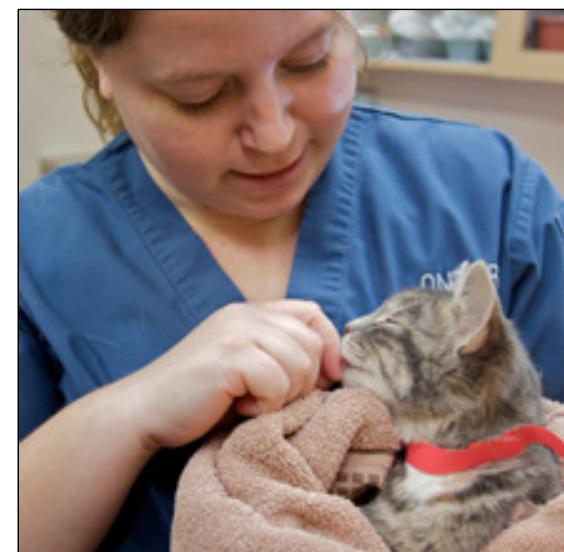
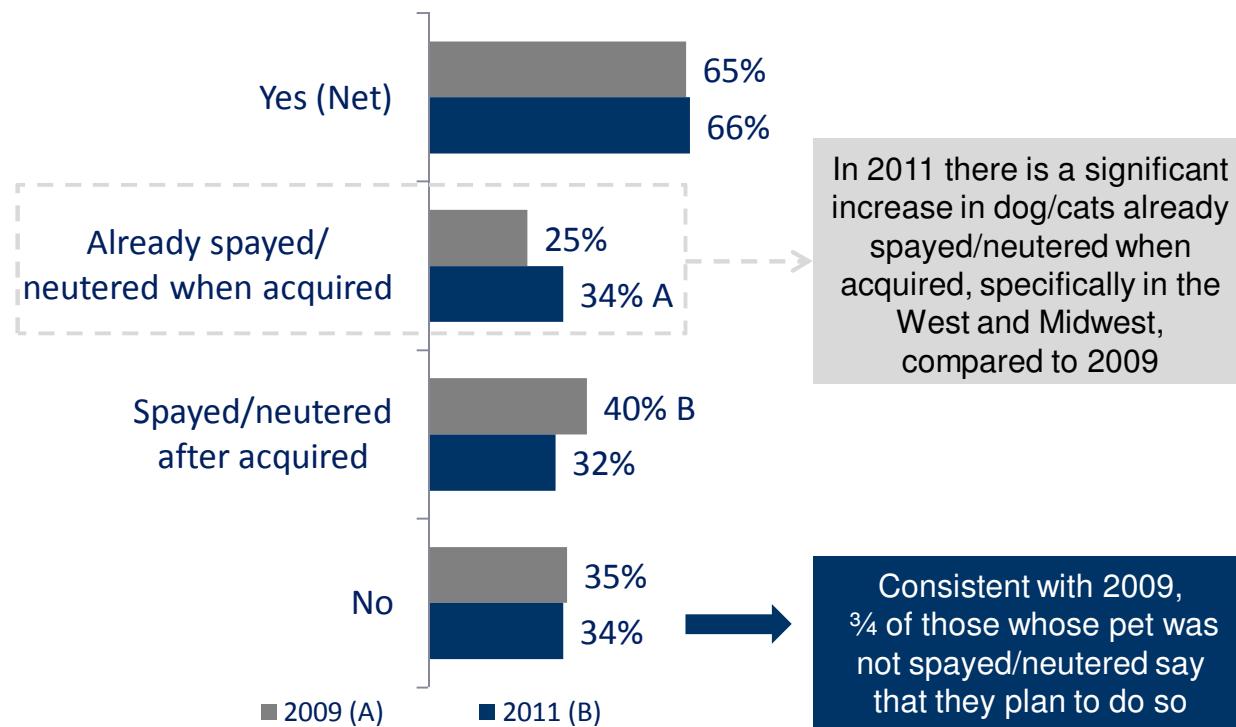
SPAY/NEUTER TRENDS

Dog/Cat Spayed or Neutered?

Among Past 12 Month Recently Acquired Pet Owners



The Percentage of Pets Spayed/Neutered is Consistent with 2009, but a Greater Percentage are Now Altered Before Acquisition – One of the Expressed Motivators of Those Who Chose to Adopt a Pet



Q.34 Is your pet spay/neutered?

Q.36 Are you considering having your pet spay/neutered

Note: Letters indicate statistical differences at the 90% confidence level

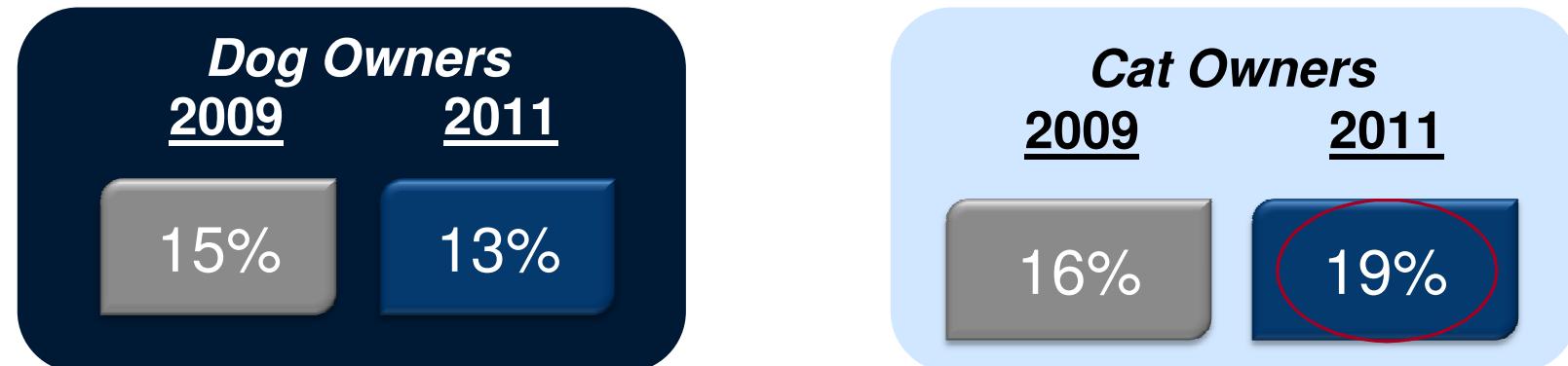
Base: P12M Recently acquired Dog/Cat Owners (2009: n=1028, 2011: n=944)

Research Conducted by Ipsos Marketing

Occurrence & Prevalence of Accidental Litters Among Total Dog/Cat Owners



Whether Dog/Cat Has Had a Litter (Overall)



Reason for Litter: Unintentional (Accidental)



Q.14 Has your dog/cat ever had a litter? Q.15 You indicated your dog/cat has had a litter, what is the reason your dog/cat had a litter?
Base: Total Dog/Cat Owners, Total Dog/Cat Owners who say dog/cat has had a litter
Research Conducted by Ipsos Marketing



BARRIERS TO SPAY/NEUTER

Reasons Chose Not to Spay/Neuter Recently Acquired Pet

Among Past 12 Month Recently Acquired Dog/Cat Owners



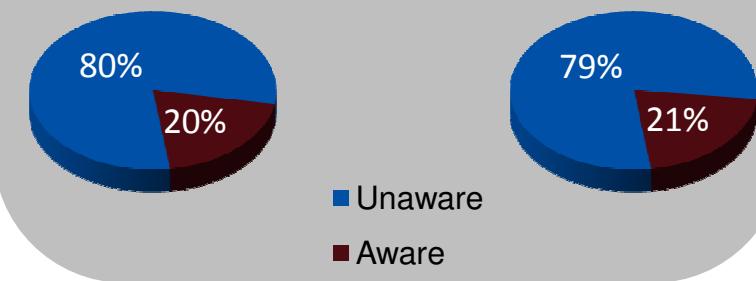
The Perception that a Pet is Too Young for Spay/Neuter has Significantly Increased Since 2009, and Awareness of Affordable Spay/Neuter Facilities Remains Low

Top Mentioned Reasons	
2009	2011
(n=360) A	(n=317) B
34%	41% A
It is too expensive	32%
Haven't gotten around to it/haven't had time	21%
Did not feel it was necessary since pet is confined to my home	11%

Among those who state cost is a barrier to spaying/neutering their pet, awareness of any low cost spay/neuter facilities in their community continues to be low

Awareness of Low-Cost Spay/Neuter Facilities

2009 (n=111) A 2011 (n=100) B



Q.45 You indicated that you chose not to spay/neuter your dog/cat. What were the reasons you chose not to spay/neuter your dog/cat?

Q.57 Were you aware of low-cost spay/neuter options in your community?

Note: Letters indicate statistical differences at the 90% confidence level

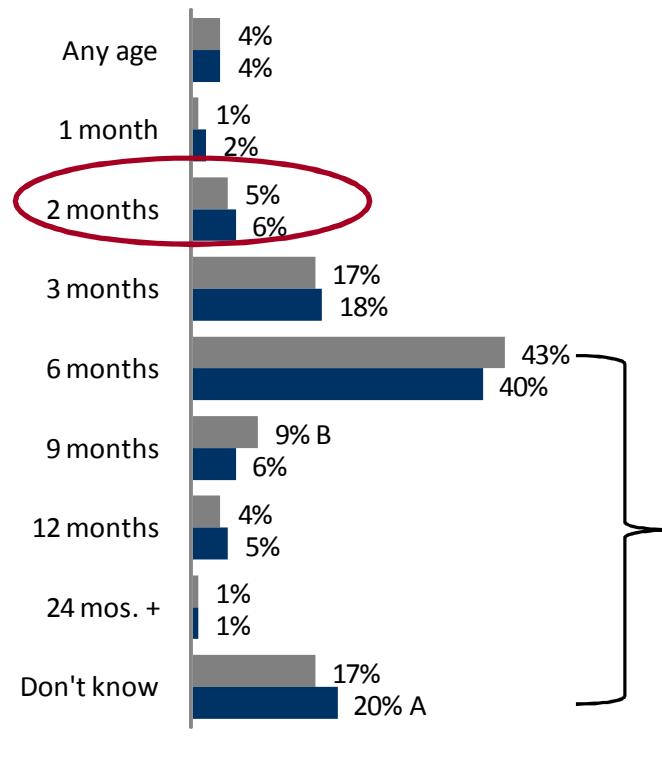
Research Conducted by Ipsos Marketing

Earliest Age Dogs/Cats be Spayed/Neutered?

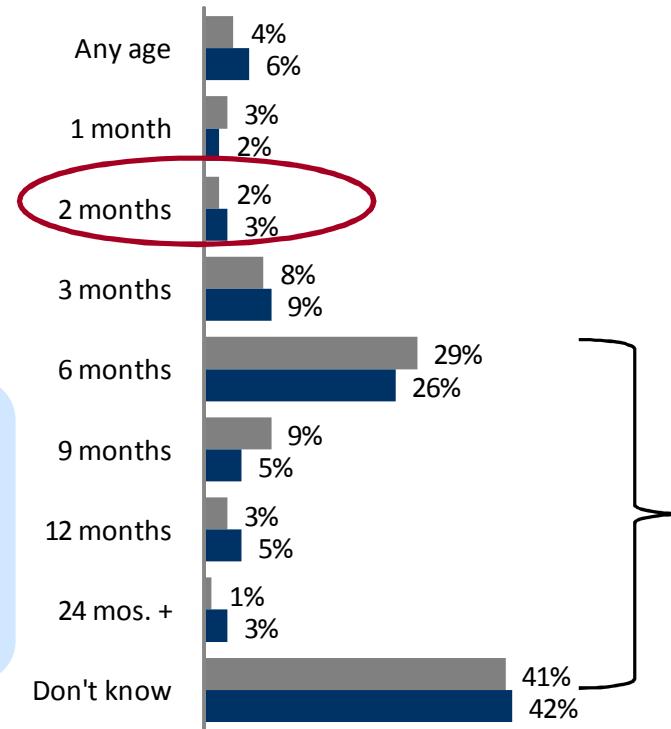


Lack of Understanding on Appropriate Age to Spay/Neuter is a Critical Opportunity for Intervention

P12M Recently Acquired Dog/Cat Owners



Dog/Cat Considerers (Non-owners)



% Estimate 6 Months + or Don't Know
2009: 74%
2011: 72%

% Estimate 6 Months + or Don't Know
2009: 83%
2011: 81%

Q.61/Q.61a What is the earliest age you can have your dog/cat spay/neutered?

Note: Letters indicate statistical differences at the 90% confidence level

Base: P12M Recently Acquired Dog/Cat Owners (2009: n=1028; 2011: n=944) Base: Dog/Cat considerers (non-owners) (2009: n=100, 2011: n=128)

Research Conducted by Ipsos Marketing

When Can Dogs/Cats be Spayed/Neutered?



Among Past 12 Month Recently Acquired Dog/Cat Owners:

% Believe it is Not Appropriate
to Spay Female before 1st Heat

2009
A

30%

2011
B

29%

% Believe it is Not Appropriate to
Spay Female before 1st Litter

2009
A

8%

2011
B

8%

Among Dog/Cat Considerers (Non-owners):

% Believe it is Not Appropriate
to Spay Female before 1st Heat

2009
A

44%

2011
B

39%

% Believe it is Not Appropriate to
Spay Female before 1st Litter

2009
A

20% B

2011
B

11%

Q.62/62a Please indicate your general perceptions on when it is appropriate to spay/neuter your dog/cat?

Base: Past 12 Month Recently Acquired Dog/Cat Owners (2009: n=1028; 2011: n=944)

Base: Dog/Cat Considerers (non-owners) (2009: n=100, 2011: n=128)

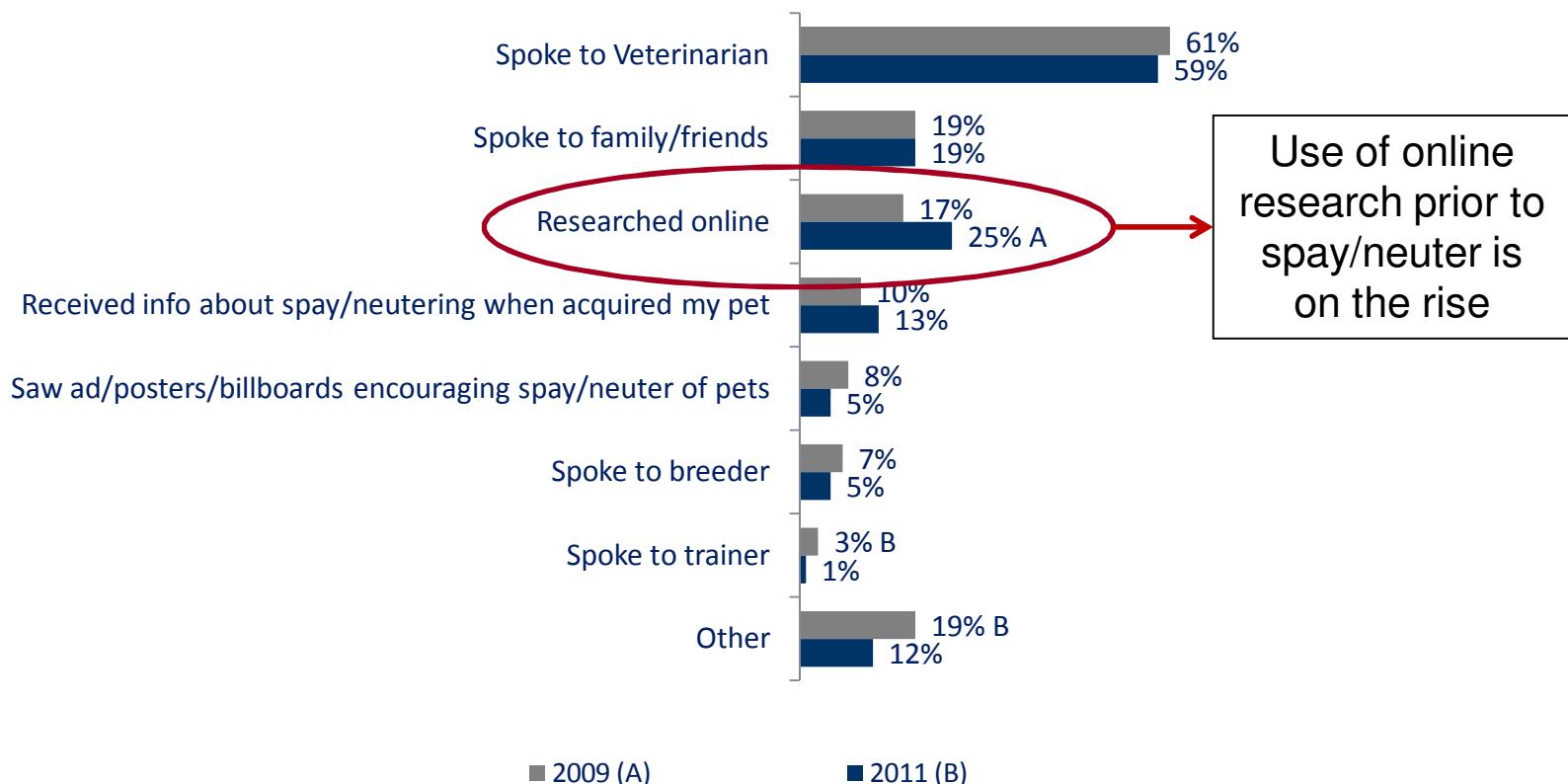
Research Conducted by Ipsos Marketing

Information Sources Used Prior to Spaying/Neutering

Among Total Past 12 Month Pet Acquirers



Those Who Chose to Spay/Neuter Their Pets are Increasingly Researching the Procedure Online Beforehand – Let's Make Sure to Get the Right Information into Their Hands!



Q.42A Which of the following sources of information would you look into prior to spay/neutering your pet?

Note: Letters indicate statistical differences at the 90% confidence level

Base: (2009: n=407, 2011: n=305)

Research Conducted by Ipsos Marketing

Perceptions of Spay & Neuter Sources

2011 v. 2009 (P12M Recently Acquired Pet Owners)

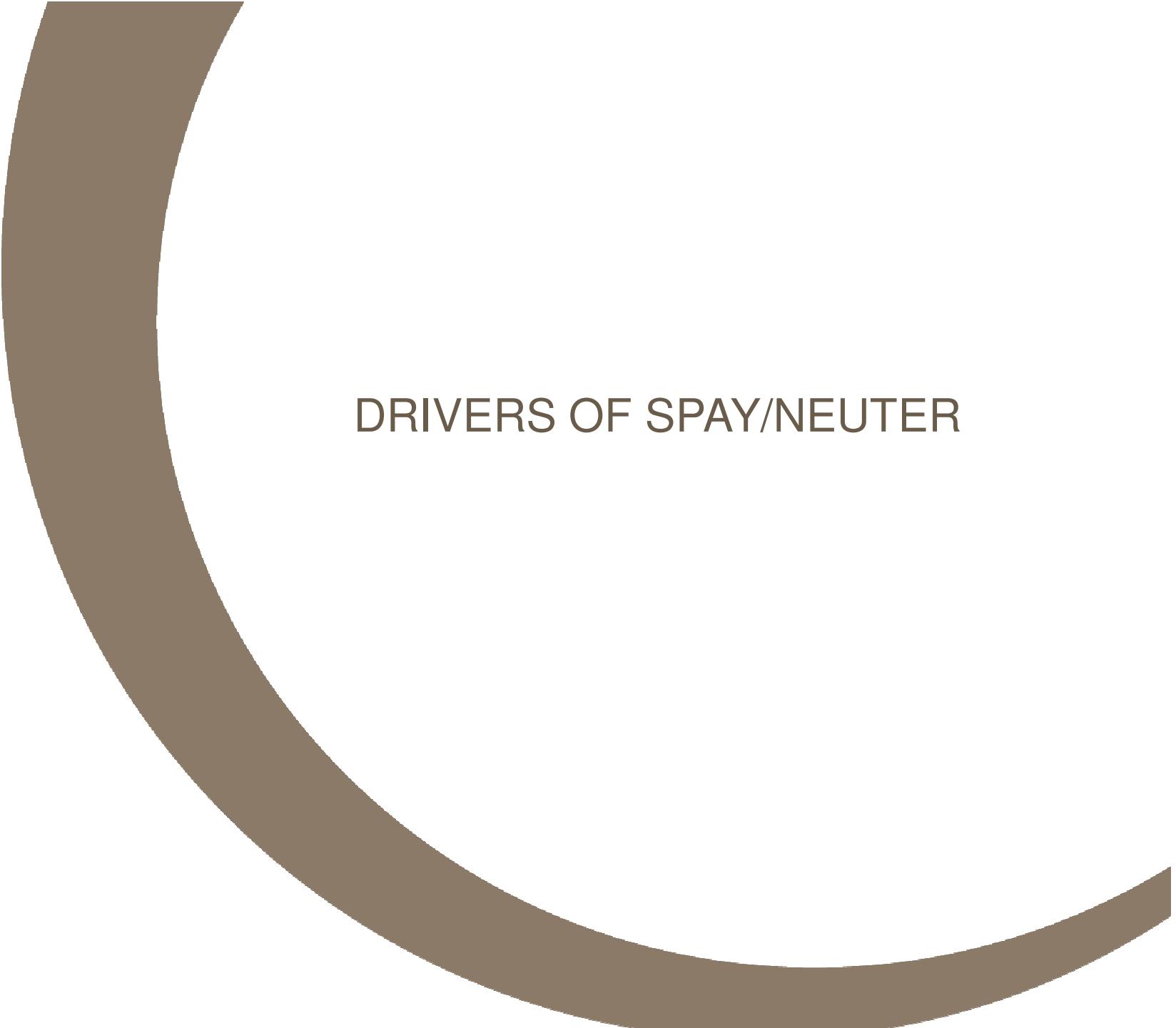


While Private Veterinary Practices Continue to be Perceived as the most Sanitary, Safe, and a Good Source of Information, These Perceptions are Declining

	2011		
	Low-cost Spay/Neuter Clinic	Private Veterinary Hospital	Humane Society
Would be low cost	77%	7%	40%
Would be safe to take my pet to	45%	77%	53%
Would trust them to do my pet's surgery	44%	78%	46%
Would have clean facilities	43%	81%	52%
Would take care of my pet	43%	76%	52%
Would be a good source of information if I had questions	43%	70%	55%
Would recommend to a friend for spay/neutering their pet	42%	59%	42%
Would not recommend this source to a friend for spay/neuter	19%	15%	16%
Would be expensive	4%	70%	11%
Would overcharge me	4%	51%	11%
None	10%	6%	11%

Significantly higher than 2009 at the 90% confidence level.

Significantly lower than 2009 at the 90% confidence level.



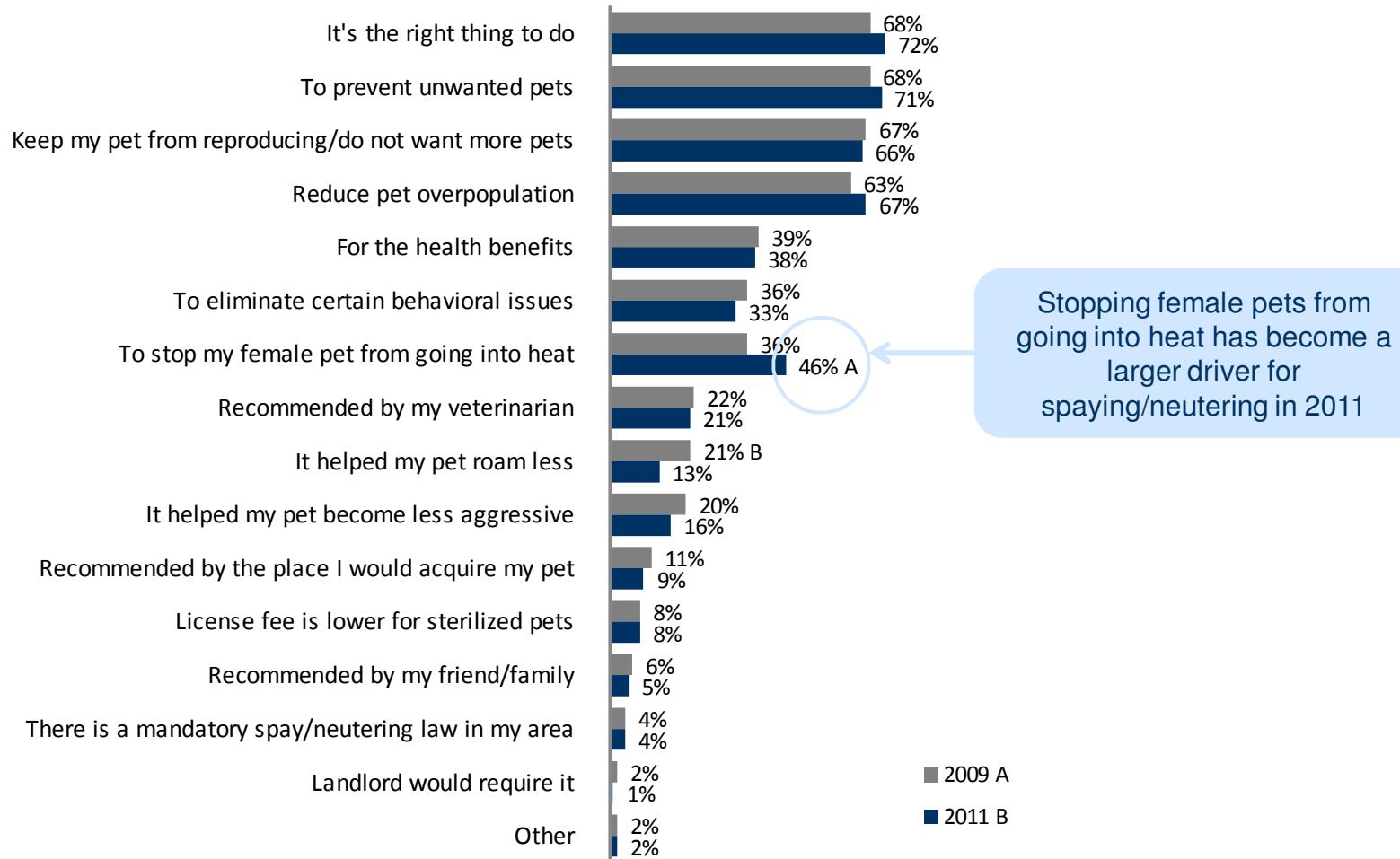
DRIVERS OF SPAY/NEUTER

Reasons for Spaying/Neutering

Among Recently Acquired Dog/Cat Owners who Altered Pet



While Most Spay/Neuter Motivators are Consistent with 2009 Findings, Stopping a Female Pet from Going into Heat was Cited Significantly More Frequently



Q.47 You indicated that you chose to spay/neuter pet. What were the reasons you chose to spay/neuter your pet?

Note: Letters indicate statistical differences at the 90% confidence level

Base: (2009: n=407, 2011: n=305)

Research Conducted by Ipsos Marketing

Motivating Factors to Use Spay/Neuter Org. Among Past 12 Month Recently Acquired Dog/Cat Owners



*Among Those Whose Most Recently Acquired Pet is Not Spayed/Neutered,
Affordability and Quality of Services Speak to the Stated Barriers to Spay/Neuter*

	2009 (n=360) A	2011 (n=317) B
Spay/Neuter Motivators		
Spaying and neutering reduces the number of homeless and unwanted dogs and cats born every year.	69%	64%
Spaying and neutering reduces annoying behaviors like female pets going into heat, male pets spraying and fighting, and you won't have more unwanted litters to place.	65%	60%
★ There are low cost spay/neuter clinics in your area.	61%	60%
Just one breeding pair of cats or dogs and their offspring can produce about 10,000 new cats or dogs in 5 years.	62%	59%
★ Many low-cost spay/neuter clinics provide medical services equal to or better than traditional veterinary offices.	65% B	58%
If you spay/neuter your pet, it is one of the most humane things you can do	60%	58%
If you don't spay or neuter your pet, your pet's offspring could end up in a shelter where he could possibly be put to sleep, or homeless on the streets.	62%	57%
One fertile dog can have two litters of puppies in one year those puppies can begin having litters by 5-6 months of age.	56%	54%
If you spay/neuter your pet, it can help make your neighborhood and community a safer, better place to live	57%	53%
One fertile cat can have three litters of kittens in one year those kittens can begin having litters by 4-6 months of age.	56%	53%
Dogs and cats who are not spayed and neutered can suffer health complications later in life.	53%	52%

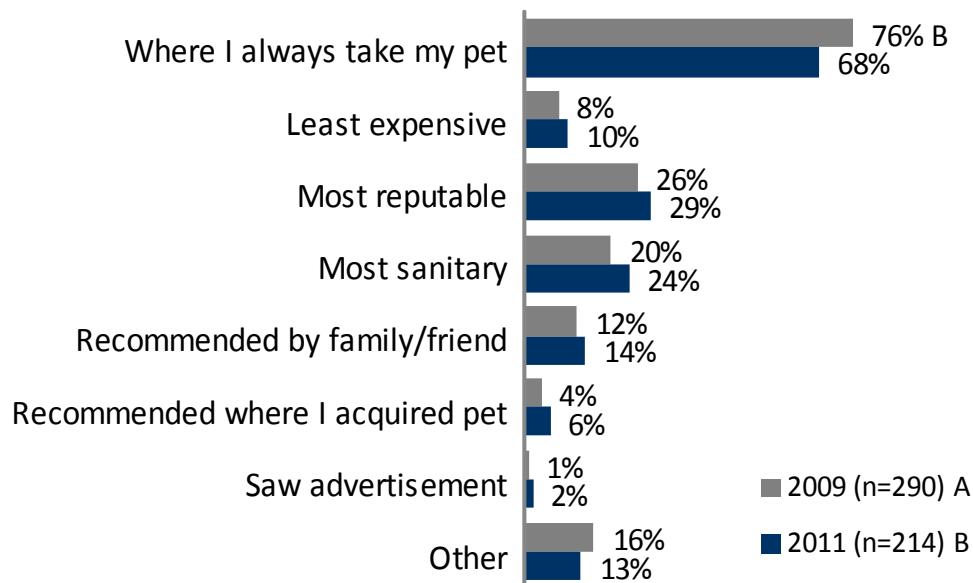
★ Messaging that addresses the top barriers for spaying/ neutering among current recently acquired dog/cat owners who have not spayed/neutered their most recently acquired pet.

Reasons Chose Source to Spay/Neuter Pet Among Past 12 Month Recently Acquired Dog/Cat Owners

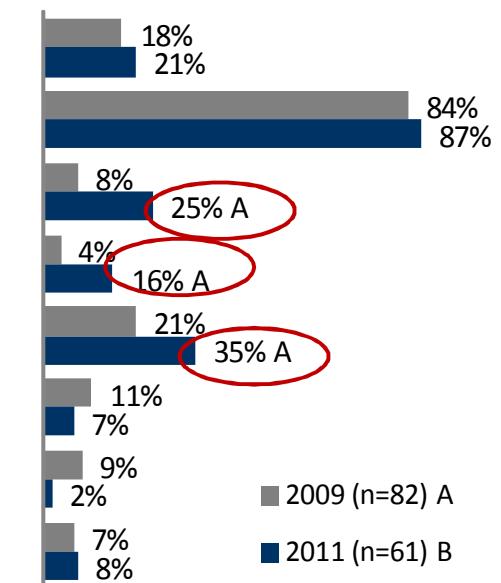


Spay/Neuter Clinics are Making Gains in Reputation, Supported by Positive Word-of-Mouth

Private Veterinary Hospital



Low-Cost Spay/Neuter Clinic



Q.41 What were the reasons you chose to spay/neuter your pet at the [private veterinary clinic/low-cost spay/neuter clinic]?
 Note: Letters indicate statistical differences at the 90% confidence level
 Research Conducted by Ipsos Marketing

KEY TAKEAWAYS



Insights & Learnings



- Awareness: Expressed concern for pet homelessness is increasing, but awareness of the scope of the euthanasia issue is still dramatically underestimated
- Adoptions
 - The value proposition of an adopted pet, which is already spayed/neutered, vaccinated, potentially trained, is strong – but portraying adoptable pets in a positive light is crucial!
 - Total shelter/rescue adoptions market share is at 17%, with convertible market share from non-adoption sources in the breeder (11%) and pet store (6%) categories
 - Acquisition sources of family/friend (24%) and stray (17%), while not technically representing animals that have entered the sheltering system, speak to spay/neuter opportunities
 - Expressed interest in fostering before adopting is on the rise
- Spay/Neuter
 - More pets are altered prior to acquisition in the 2011 survey versus 2009
 - Early age spay/neuter messaging is absolutely critical, and is currently inadequate
 - Lower-cost providers can continue to improve perceptions by emphasizing their quality and expertise, fueled by word-of-mouth from existing clients – ask clients to refer friends/family!
- Conclusion: The better we as an industry are able to listen and speak to the needs of our constituents, the more lives we can save, together!

Thank you!

Questions?