INTRODUCTION

1.5 Million New Pets Owners
Register with 24PetWatch Annually
80% Newly Adopted from AWO's

What did they want to know?
THEY WANTED TO KNOW

WHO?
WHAT?
WHEN?
WHERE?
WHY?

2017
34,000 completed surveys

SO WHAT DID WE CHANGE THIS TIME AROUND

Involved more great people
Kara Albrecht
CEO
Sacramento SPCA
Kenn Altine
CEO
Potters League
Brad Schear
Executive Director
Potters League
Sharon Harvey
Executive Director
Cleveland Animal Protective League
Robyn Barbiers
President and DVM
Anti-Cruelty Society
Tori Fugate
Manager of Marketing and Development
Kansas City Pet Project
Robby Nisenfeld
Marketing and Communications Director
Arizona Humane Society
Miguel Abi
Executive Director
Halifax Humane
Jim Hanophy
Executive Director
Operation Kindness
Janelle Dixon
President and CEO
Animal Humane
James Bias
President
SPCA of Texas
Brought in more expertise
Janet M Scarlett
DVM, MPH, PhD, Research, etc.
Pethealth Team
Gilberto Gandara
Consultant
Jordana Matsos
VP Client Services
Guinn Friedmann
Sr Director Client Services
Todd Whittington
VP Strategic Initiatives

THE SURVEY

12 Minute
US Adopters
Dogs or Cats

January 1st to June 30th, 2018
THE SURVEY

10,538 completed
58% Dog Adopters
42% Cat Adopters

THE SURVEY

I. Northeast
II. Midwest
III. South
IV. West

31 states with statistically significant sample size

SURVEY RELIABILITY

Sample size of +10,000
Margin of error of +/- 1%
95% confidence level

What this means
If 50% of the sample answered 'yes' to a question the answers of the whole population will lay between 49 - 51%.

High confidence in findings
THE MARKET: WHERE PETS ARE OBTAINED

- **Dogs:**
  - **Pet store adopt:** 9%
  - **Friend:** 31%
  - **Breeder:** 28%
  - **Pet store purchase:** 9%
  - **Stray:** 5%
  - **Other:** 3%

- **Cats:**
  - **Pet store adopt:** 7%
  - **Friend:** 27%
  - **Shelter:** 21%
  - **Breeder:** 31%
  - **Pet store purchase:** 27%
  - **Stray:** 5%
  - **Other:** 24%

AWD’s are the largest source of new pets in the US

BACKGROUND & OBJECTIVES

The purpose of the pet adopter survey is to better understand overall motivations and experiences from pre to post adoption, including:

- **Pre-adoption decision making**
  - Key decision maker
  - Planned vs. spontaneous decision
  - Sources of information and influencers

- **Adoption process**
  - Characteristics of value for pet adoption
  - Comparison with previous pet before adoption

- **Post-adoption reflection**
  - Likelihood to adopt in the future
  - Ways to improve the process, particularly when it comes to shelters

IS THERE A TYPICAL ADOPTER?
YOUR TARGET AUDIENCE: ADOPTER PROFILE

72% without kids under 18 in home
63% married/cohabitating
45 median age

APP 2018 Survey
66% Dog and 69% Cat without kids under 18 in home
84% Dog and 82% Cat married/cohabitating
28% under 45%

55% Have only one dog
30% have one or more dogs
30% have one or more cats

45% Have only one cat
36% have one or more cats
29% have one or more dogs

APP 42% have a cat.

80% 72%

without kids under 18 in home
64% Dog and 67% Cat without kids under 18 in home
85% Dog and 81% Cat married/cohabitating
(US census 42%)

YOUR TARGET AUDIENCE: AGE

<table>
<thead>
<tr>
<th>Adult age groups</th>
<th>Survey Respondents</th>
<th>APPA</th>
<th>US population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials+ (aged 37 or younger)</td>
<td>29%</td>
<td>39%</td>
<td>31%</td>
</tr>
<tr>
<td>GenX (aged 38-53)</td>
<td>28%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Boomers (aged 54-72)</td>
<td>36%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Silent Gen (aged 73 or older)</td>
<td>7%</td>
<td>6%</td>
<td>15%</td>
</tr>
</tbody>
</table>

YOUR TARGET AUDIENCE: HOUSEHOLD INCOME

<table>
<thead>
<tr>
<th>Region</th>
<th>Survey Sample</th>
<th>APPA Dog</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $25K</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>$25K-$50K</td>
<td>33%</td>
<td>17%</td>
</tr>
<tr>
<td>$50K-$75K</td>
<td>12%</td>
<td>27%</td>
</tr>
<tr>
<td>$75K-$100K</td>
<td>15%</td>
<td>37% (&gt;$75K)</td>
</tr>
</tbody>
</table>

NOTE: For the table above, Green/Red is 5%+ higher/ lower than average

Your age group: 31%
Your region: 10%
YOUR TARGET AUDIENCE: DECISION-MAKERS

Decision-makers are overwhelmingly female who planned for their adoption.

76% of adopters said they initiated the discussion to adopt a pet, which means it is predominantly the woman in the household. Otherwise it is the spouse (15%) or children (8%).

Planned or Impulse Decision

- Planned: 36%
- Impulse: 64%

The Need: Why Get a Pet?

It is an emotional decision.

- Therapeutic reasons
- Sibling for pet
- Lost a pet
- Grew up w pets
- For companionship
- Desire to rescue
- I love animals

The Need: Why From You?

US reason is emotional (saving an animal) which is higher than for rescue and pet store. For practical reasons, shelters and pet stores score higher than rescue organizations.
THE NEED: USING EMOTION TO MOTIVATE ACTION

Top 3 rated are positive ones of healthy animals #1 rated message is specific rather than generic

Bar Chart:
- 0%
- 12.5%
- 0%
- 12.5%
- 37.5%
- 0%
- 37.5%
- 59%
- 43%
- 56%
- 63%
- 46%
- 57%
- 62%
- 69%

Survey Results:
- Adopt a pet today!
- We are running out of space! Come adopt a pet today!
- We have so many great animals, that we are running out of space!
- Adopt a pet today!
- Lucky was hit by a car and lost her leg and left eye. She has a lot of love to give and she needs a home quick! Adopt a pet today!
- Lucky is well behaved, loving, and house trained. He needs a new home, quick! Adopt a pet today!

MAKING CONTACT: DECISION-MAKING PROCESS

Pre-Adoption Steps

<table>
<thead>
<tr>
<th>Pre-Adoption Steps</th>
<th>Survey Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>None of the above</td>
<td>61%</td>
</tr>
<tr>
<td>Visited shelter/rescue</td>
<td>43%</td>
</tr>
<tr>
<td>Visited pet store</td>
<td>29%</td>
</tr>
<tr>
<td>Spoke to friends/family</td>
<td>16%</td>
</tr>
<tr>
<td>Looked online</td>
<td>13%</td>
</tr>
<tr>
<td>Read books/articles</td>
<td>13%</td>
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Base: Adopters who kept their pets, N=10,376
Q12. Which of the following, if any, did you do before adopting your most recent pet? Multi-select so can add up to more than 10
Q15. Which of the following, if any, did you do online prior to adoption? Q16. More specifically, did you view pet's phone/profile online?

MAKING CONTACT: ONLINE

You and your animals first contact with adopters is online

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80% view their pet online
37% found pet they wanted to adopt
29% found pet they may want to adopt
55% monitor sites regularly

88% said being involved in multiple ways prior to adopting a pet

Highlights opportunity in collecting visitor info and having a follow up process.
ADOPTION: REASONS FOR CHOOSING CURRENT PET

Selection drivers primarily emotional

<table>
<thead>
<tr>
<th>Reasons for Choosing Pet</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Personality</td>
<td>82%</td>
</tr>
<tr>
<td>Just met them</td>
<td>61%</td>
</tr>
<tr>
<td>Appearance</td>
<td>50%</td>
</tr>
<tr>
<td>Breed</td>
<td>40%</td>
</tr>
<tr>
<td>Good health</td>
<td>30%</td>
</tr>
<tr>
<td>Staff recommended</td>
<td>20%</td>
</tr>
<tr>
<td>Size</td>
<td>12%</td>
</tr>
</tbody>
</table>

All relate to the in shelter experience with the pet

Size (50%) and breed (39%) are more relevant when it comes to choosing a dog

HOW DOES WHAT YOU DO IMPACT ADOPTER SATISFACTION?

Adopters are overwhelmingly satisfied with their adoption experience across organizations

<table>
<thead>
<tr>
<th></th>
<th>Shelter</th>
<th>Rescue</th>
<th>Pet store</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review of medical history</td>
<td>89%</td>
<td>85%</td>
<td>57%</td>
</tr>
<tr>
<td>Assessment of my experience</td>
<td>59%</td>
<td>60%</td>
<td>42%</td>
</tr>
<tr>
<td>Assessment of household</td>
<td>62%</td>
<td>56%</td>
<td>25%</td>
</tr>
<tr>
<td>30-day free insurance</td>
<td>39%</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Meet and greet</td>
<td>39%</td>
<td>62%</td>
<td>19%</td>
</tr>
<tr>
<td>Assessment of time required</td>
<td>28%</td>
<td>35%</td>
<td>17%</td>
</tr>
<tr>
<td>Financial discussion</td>
<td>8.0%</td>
<td>31%</td>
<td>17%</td>
</tr>
<tr>
<td>Home visit</td>
<td>3%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>None of the above</td>
<td>5%</td>
<td>8%</td>
<td>16%</td>
</tr>
</tbody>
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Adopters are overwhelmingly satisfied with their adoption experience across organizations
ADOPTION: OPPORTUNITIES FOR IMPROVEMENT

63% No change
37% Yes, can be improved

Ways to Improve Experience:
- Info about pet's behavior: 28%
- Medical exam: 12%
- Better post-adoption support: 8%
- Free insurance: 6%
- More guidance from shelter staff: 5%

NET PROMOTER SCORE

The Net Promoter Score is an index ranging from -100 to 100 that measures the willingness of customers to recommend a company’s products or services to others.

The Net Promoter Score is calculated by subtracting the percentage of detractors from the percentage of promoters.
ADOPTION: LIKELIHOOD TO RECOMMEND (NPS)

<table>
<thead>
<tr>
<th>Net Promoter Scores Among Highest Ratings</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>+0% Good</td>
<td>+78</td>
</tr>
<tr>
<td>+60% Excellent</td>
<td>+76</td>
</tr>
<tr>
<td>+70% World Class</td>
<td>+61</td>
</tr>
</tbody>
</table>

BUSINESS CASE: PETHEALTH AND THE POWER OF NPS

CUSTOMER EXPERIENCE

<table>
<thead>
<tr>
<th>Net Promoter: Pet Health Reviewer</th>
<th>Number of Monthly Reviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>N/A</td>
</tr>
<tr>
<td>2017</td>
<td>2.0</td>
</tr>
<tr>
<td>2018</td>
<td>9.0</td>
</tr>
</tbody>
</table>

Turning customers into brand advocates

POST-ADOPTION: LIKELIHOOD TO ADOPT BY VENUE

Adopters are very likely to adopt from shelters again, followed by rescue organizations. Pet stores and breeders are not likely destinations among this adoption group.
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Pet stores and breeders are not likely destinations among this adoption group.

POST-ADOPTION: LIKELIHOOD TO ADOPT AGAIN
Many ‘unlikely’ to adopt is just timing
Age is definitely a factor. I now have two dogs who I love. But it is a lot of work.
Finances, home/yard isn’t big enough, two dogs are good enough.
It takes a lot of time and training, and I am not skilled at training. While I will keep and love my current animal, I will not get another dog after this one.

POST-ADOPTION: SURRENDERING A PET
Less than 2% of respondents said they had given their pet away to family/friends or rehomed elsewhere, and they tended to be dog adopters (N=122)

WHAT HAPPENED TO THE PET?
74% Surrendered to a shelter while the remainder were given away to family/friends or rehomed elsewhere
POST-ADOPTION: DECREASING LIKELIHOOD TO SURRENDER

Could anything have been done to have kept the animal in the home?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>Not sure</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>44%</td>
<td>30%</td>
<td>56%</td>
</tr>
</tbody>
</table>

What could have been done?

- I asked to bring my dog to the shelter to meet the cat before adopting but was not allowed to take the cat back home. It would have saved much stress on myself & the cat & dog.
- Extensive training to make the dog less aggressive to other dogs.
- The shelter has a behavioral specialist, but I didn’t know about it at the time, and the service was not offered.
- When you adopt a pet that is already sick (she had lost weight at the shelter), it would be nice if the shelter would have worked with us to identify what was wrong with her and help fix it so we could have kept her.