Overcoming Adoption Barriers Research: Executive Summary

Best Friends
SAVE THEM ALL
85% say they would *consider* adopting their next pet cat or dog.

66% say adoption is their *most likely* option when getting a new pet.

While adoption is an option among many, it is not always their top option and it does not reflect their actual decision when getting their new pet.

40% *adopted* their *most recent* pet cat or dog.

Source: 2014 BFAS Brand Awareness Study
Adoption Research

In order to assist the organization/industry in closing the gap between adoption interest and adoption behavior, we partnered with M&RR to conduct a research.

Understand Adoption Barriers (real or perceived)

Provide a clear understanding of the key barriers to pet adoption, what triggers convinced adopters to follow through with that method

Assess Potential Opportunities to Remove Barriers

Determine what opportunities exist among pet owners to shift perceptions about pet adoption or remove any barriers currently preventing those interested in adopting from actually adopting
An online survey was conducted among people who have purchased or adopted a pet dog or cat in the past year (we wanted the experience to be fresh in their minds).

Field Dates: September 29, 2016 to October 11, 2016

Qualifying respondent criteria
Adults who met the following criteria for the survey:

- U.S. residents 18 to 70 years old
- HHI $25K+
- Has at least some input in the decision to acquire a pet
- Purchased / Adopted a dog or cat in P12M
- Acquired / seriously considered both purchasing and adopting
- Passes sensitive industry screener

27-minute quantitative online survey

Adopters n=490
Purchasers n=310

Dogs Acquired in P12M n = 559
Cats Acquired in P12M n = 241

800 Completes Drawn from Gen Pop Internet Panels (blended)
- **Research Process**
  - Online important

- **Pet Considerations**
  - Good health, friendly / compatible with animals & children, mild / calm temperament.
  - Characteristics > Breed (though breed & age still important to purchasers)

- **Acquisition Option Perceptions**
  - Positive perceptions of rescues and shelters, even among purchasers.

- **Acquisition Option Experiences**
  - Start to experience problems here with adoption – paperwork, rejections, intrusive, overcrowded, uncertainty around pet background & health.

**Make Adoption Easy & Remove Uncertainty**
Research Findings:
Executive Summary
Acquiring a Pet: Research Process

The experience of acquiring a new pet is an exciting one and many sources are used when researching options. Adopters favor in person visits to shelters/rescues; Purchasers prefer online sources and breed specific information.

<table>
<thead>
<tr>
<th>Dogs</th>
<th>Cats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do more research Online (77%)</td>
<td>Do more research In-person (78%)</td>
</tr>
<tr>
<td>Use:</td>
<td>Use:</td>
</tr>
<tr>
<td>47% Pet finder sites</td>
<td>58% Rescues</td>
</tr>
<tr>
<td>46% Breed specific sites</td>
<td>33% Pet stores</td>
</tr>
<tr>
<td>46% Online articles</td>
<td>33% Pet stores</td>
</tr>
<tr>
<td>21% Breeders</td>
<td></td>
</tr>
</tbody>
</table>

Most useful sources:
- 81% Spouse/Sig. other
- 70% Breed-specific sites
- 62% Online articles

Most useful sources:
- 76% Shelters
- 72% Rescues
- 61% Pet stores associates

| Resources referenced...      |
|------------------------------|-----------------------------|
| Adopters                     | Purchasers                  |
| **74% Online:**              | **75% Online:**              |
| 42% Pet finder sites         | 48% Breed-specific sites     |
| 32% Breed-specific sites      | 45% Pet finder sites         |
| 29% Social Media              | 27% Social Media             |
| 27% Craigslist                | 23% Craigslist               |

**81% In person:**
- 59% Rescues
- 45% Shelters
- 26% Pet stores
- 16% Public events

**61% In person:**
- 34% Rescues
- 28% Breeder
- 24% Shelter
- 24% Pet stores

**56% Reading:**
- 36% Online articles
- 32% Online reviews

**65% Reading:**
- 48% Online articles
- 39% Online reviews

Only 5% of Adopters and Purchasers experienced problems while researching their decision.
Snapshot of Adopters vs. Purchasers

- Dogs more likely to be purchased
- Purchasers spend more time researching
- Purchasers expect to spend more on their pet
- Purchasers are looking for younger pets
- Purchasers are more likely to get a purebred pet
- Adopted pets are more likely to be spay/neutered
- Adopters are more likely to use the place again

Dogs vs. Cats

- Adopters: 61% (Dogs), 39% (Cats)
- Purchasers: 86% (Dogs), 15% (Cats)

Days Spent Researching

- Adopters: 16 days
- Purchasers: 22 days (▲)

Pet Age at Acquisition

- Adopters: 45% (0-6 mos.), 39% (7 mos. to 2 yrs.), 15% (3+ years)
- Purchasers: 80% (0-6 mos.), 17% (7 mos. to 2 yrs.), 3% (3+ years)

Purebred vs. Mixed

- Adopters: 19% (Purebred), 15% (Cross), 66% (Mixed / Unsure)
- Purchasers: 57% (Purebred), 20% (Cross), 23% (Mixed / Unsure)

Spayed / Neutered Beforehand

- Adopters: 71% (▲)
- Purchasers: 20%

Likelihood to use place again

- Adopters: 89% (▲)
- Purchasers: 65%
Overall, characteristics outweigh breed. While breed is important to purchasers and dog owners, health, compatibility, and temperament are the most important traits.

The most important traits in a new pet are:

- **80%** Good health
  - (76% A; 85% P)

- **77%** Friendly / compatible with other animals
  - (76% A; 78% P)

- **73%** Friendly / compatible with children
  - (72% A; 75% P)

- **62%** Mild / calm temperament
  - (61% A; 63% P)

- **43%** Housebroken

- **41%** Spayed / neutered

- **53%** Puppy / kitten

- **50%** Specific breed

- **37%** Purebred

- **31%** Small cat / dog

- **30%** Not rescued from an abusive environment

- **52%** Housebroken

- **46%** Spayed / neutered

- **25%** Female

- **25%** Trained
# Rescue & Shelter Perceptions

Impressions of Rescues and Shelters are positive across Adopter, Purchaser, Dog, and Cat segments and are more favorable than for other types of pet acquisition places.

## Positive Impressions:

<table>
<thead>
<tr>
<th></th>
<th>Adopters</th>
<th>Purchasers</th>
<th>Dogs</th>
<th>Cats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animal rescue</td>
<td>96%</td>
<td>83%</td>
<td>90%</td>
<td>92%</td>
</tr>
<tr>
<td>Animal Control / Shelter / City Pound</td>
<td>83%</td>
<td>74%</td>
<td>79%</td>
<td>80%</td>
</tr>
<tr>
<td>Breeder</td>
<td>43%</td>
<td>64%</td>
<td>55%</td>
<td>42%</td>
</tr>
<tr>
<td>Pet store</td>
<td>50%</td>
<td>40%</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>Individual advertising a [dog / cat] for sale</td>
<td>37%</td>
<td>48%</td>
<td>42%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Purchasers and Dog owners are more favorable towards breeders and individual sellers, but impressions of Rescues and Shelters are still higher.

## Negative Impressions:

<table>
<thead>
<tr>
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<th>Adopters</th>
<th>Purchasers</th>
<th>Dogs</th>
<th>Cats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pet store</td>
<td>30%</td>
<td>41%</td>
<td>38%</td>
<td>25%</td>
</tr>
<tr>
<td>Breeder</td>
<td>30%</td>
<td>16%</td>
<td>22%</td>
<td>30%</td>
</tr>
<tr>
<td>Individual advertising a [dog / cat] for sale</td>
<td>21%</td>
<td>21%</td>
<td>22%</td>
<td>18%</td>
</tr>
<tr>
<td>Animal Control / Shelter / City Pound</td>
<td>6%</td>
<td>11%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Animal rescue</td>
<td>1%</td>
<td>6%</td>
<td>4%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Pet stores have negative impressions among all pet owners.

Breeders are negatively viewed by Adopters and Cat owners.

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% = Indexes higher than Average
% = Indexes lower than Average
▲ = Significantly higher than other group
Rescue & Shelter Experience

Barriers to Adopting from Shelters and Rescues are directly related to the issues encountered during the most recent experience. Shelters and Rescues are described similarly and are believed to offer the same types of animals, the same benefits and have the same drawbacks:

Rescues / Shelters are both rated low on:
- Too much paperwork / Lengthy application process / Strict requirements
- High fees
- No response / Lack of follow up
- Overcrowded
- Not conveniently located

Both are believed to have:
- Mixed breeds
- Friendly pets
- Adult pets
- Stray or abandoned pets
- Questionable breeds / unable to verify

Rescues and Shelters are rated highly on cleanliness and the well-being of the animals overall, but the condition of Shelters seems to vary.

“Dirty, unfriendly.” *Female, 30, Dog Breeder*

“Because the animals I feel are not properly cared for.” *Female, 31, Dog Pet store*

“Over crowded, limited information on pets.” *Female, 67, Dog, Animal rescue but not during a visit to a pet supply store (e.g., Petco or PetSmart)*

“They aren’t the cleanest. The animal cages are small and so close together. The animals look miserable.” *Female, 37, Cat, Animal rescue while visiting a pet supply store (e.g., Petco or PetSmart)*
Acquisition Motivators

Reasons for choosing the places where they acquired their new pet vary for Adopters and Purchasers and are specific to each group

**Adopters** motivated by:
- Desire to rescue an animal
- Low cost
- Vaccines, spayed / neutered, etc.
- Friendly, polite, knowledgeable staff
- Large selection

Adopters are more favorable towards rescues and shelters;

**Purchasers** motivated by:
- Specific breed
- Prior bad experience with a Rescue
- No medical issues with cat / dog
- No shedding / low allergen breed
- Quicker process

Some purchasers wanted to rescue, but were rejected or the process took too long and the animal they wanted was gone

A consolidated source providing detailed and accurate information, such as breed and medical history, will work to sway more Purchasers to adopt

In addition, a streamlined, and more lenient application approval process will help lower rejections and increase strong household matches
Acquisition Motivators

Why Decided To Get Pet Where They Did Instead of Other Places Considering

**Adopters**

“I thought it would be better to rescue a dog from the pound rather than buy a puppy that I’m sure will easily find a home. I also like that my dog was already spayed and up-to-date on shots.” Female, 33, Dog

“When I talked to them on the phone, they were very polite and knowledgeable. The low adoption fee included neutering, vaccines, microchip, license and first vet visit.” Female, 41, Dog

“We ended up getting our pets from a local shelter because in the end it was the cheapest option and it also saved the animal from possibly being put down.” Female, 19, Cat

“I just clicked with the dog I adopted. I didn’t like the idea of buying a dog from a breeder when there were so many that needed homes at a shelter.” Female, 24, Dog

“They had the type of kittens we where looking for. They had been vet checked and vaccinated with first vaccines.” Female, 50, Cat

“The large selection, lower prices, [and] good customer service.” Female, 33, Cat

**Purchasers**

“We were looking for a specific breed.” Female, 36, Dog

“We knew what kind of dog we wanted and would work best with our family but we couldn’t find one at a rescue or shelter.” Female, 29, Dog

“We have had bad experiences with rescue dogs in the past.” Female, 24, Dog

“Wanted a dog that did not shed. Also wanted a dog that would have the least medical issues.” Female, 45, Dog

“I am allergic to most cats so we needed to get a specific low allergen breed.” Male, 34, Cat

“I have gotten cats from other avenues before and they have always gotten sick and died too early in their life.” Male, 55, Cat

I tried to adopt from several rescue operations but after completing a 4-5 page application and waiting for approval the dog I wanted was gone. This happened at more than one rescue place.” Female, 54, Dog

“Adoption process took too long, breeder wanted too much money and pet store was very smooth in the buying process.” Male, 47, Dog

- Adopters in general like the idea of “rescuing” an animal and appreciate the low cost and up-to-date medical care that comes with adopting through a shelter or rescue

- Purchasers have a specific time frame and animal in mind, such as breed, size, low allergen / shedding, and healthy
Overall Experience with Location

Most Adopters and Purchasers are satisfied and rate the overall experience of acquiring their pet as excellent or very good. Despite their high levels of satisfaction, Purchasers are less likely to use the same source again and are open to rescuing a pet in the future.

**Adopters** describe their Adoption place as:
- Friendly
- Clean
- Affordable
- Pets are well taken care of

Adoption places rate highly on:
- Friendly / caring associates
- Amount of time able to spend interacting
- Clear explanation of the process
- Well-lit facility
- Cleanliness
- Care of the animals

But...
- the process is not always easy, smooth, streamlined, or approved

**Purchasers** describe their Purchase place as:
- Experienced
- Helpful
- Knowledgeable

Purchase places rate highly on:
- Ease of the overall process
- Friendly / caring associates
- Care of the animals
- Length of time process takes
- Amount of paperwork
- Not overcrowded

But...
- many prefer to rescue a pet and it can be too expensive

“I’d really like to rescue. I still feel guilty that it didn’t work out. I think it was just meant to be for Charlie to come into our lives.” - Female, 46, Dog, Breeder

“We will likely choose to start with a shelter to see what kinds of pets are available and how easy they are to handle. We will always want a pet that is smallish when mature. The breeder has been an awesome source of information but it will not be the first stop.” - Male, 60, Dog, Breeder
Barriers to Adoption from Purchasers

Cost (when looking for extremely low costs...generally purchase from individual ad)
Slow / no response upon initial contact
Long approval process
  - Animal no longer available
Rejected applications due to
  - Yard type
  - Hours worked,
  - Type of home
Strict rules and requirements
  - The fine print in the paperwork / application process deemed too intrusive and invasive for some

Unwilling to accept animals with unknown history / backgrounds
  - No abusive environment
  - Questionable breed(s)

Unwilling or unable to take on medical / health problems
Strong desire for purebreds
Strong desire for young animals (puppies / kittens)
Strong desire for specific characteristics
  - Low shedding
  - Low allergen

"I tried to adopt from several rescue operations but after completing a 4-5 page application and waiting for approval the dog I wanted was gone. This happened at more than one rescue place. One actually had in their paperwork that if I moved and did not notify them that they retained the right to take the dog back. They need to realize that while trying to get the animals good homes they are turning lots of people away." Female, 54, Dog, Individual advertising a pet for sale

"Other places wanted a $75 to $120 adoption fee. The people I adopted her from wanted $20 and they had all of her vet records and she looked like she was well taken care of." Male, 47, Cat, Individual advertising a pet for sale

"The rescue service along with the local city pound demanded that my husband and I each fill out a ten page application, including three references, agree to home visits and follow ups, along with a $150 "adoption fee" ... Both organizations deemed my family unfit for a rescue dog because we live in a duplex with no fenced in yard, and work "unorthodox" shift schedules (emergency services)." Female, 40, Dog, Breeder

"I wanted a specific breed of purebred puppy. Rescues had too many limitations and were too picky." Female, 44, Dog, Breeder

"Adoption agency wouldn't let me have a dog based on where I live as I do not have a yard. However I go home everyday at lunch to let him out and take him for walk. Then I live right across the street from the dog beach and we run 2 miles a day. He also gets to come to work with me on Fridays." Female, 30, Dog, Individual advertising a pet for sale
Two-thirds of pet owners say the kill rate is higher than they thought it was. This knowledge both groups are more likely to adopt from a rescue or shelter in the future.
### Potential Improvements Recap

#### Key Drivers in Adoption Consideration: Index Scores

The top 6 opportunities all address **making adoption easier and removing uncertainty**:  
- **Ease & Uncertainty**: Ability to spend time with animal in a private area at the facility  
- **Uncertainty**: Standardized behavioral / medical checklist with key information  
- **Ease**: Ability to take pet home the same day  
- **Ease**: Ability to search database of pets for adoption with all of their information  
- **Uncertainty**: Access to a veterinarian to discuss animal's health  
- **Ease & Uncertainty**: Trial adoption period with animal before committing to adoption  

<table>
<thead>
<tr>
<th>Feature</th>
<th>Adopters</th>
<th>Purchasers</th>
<th>Dogs</th>
<th>Cats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability to spend time with animal in a private area at the facility</td>
<td>192</td>
<td>182</td>
<td>185</td>
<td>196</td>
</tr>
<tr>
<td>Standardized behavioral / medical checklist with key information</td>
<td>190</td>
<td>179</td>
<td>184</td>
<td>189</td>
</tr>
<tr>
<td>Ability to take pet home the same day</td>
<td>144</td>
<td>150</td>
<td>141</td>
<td>159</td>
</tr>
<tr>
<td>Ability to search database of pets for adoption with all of their information</td>
<td>134</td>
<td>136</td>
<td>138</td>
<td>127</td>
</tr>
<tr>
<td>Access to a veterinarian to discuss animal's health</td>
<td>128</td>
<td>134</td>
<td>129</td>
<td>134</td>
</tr>
<tr>
<td>Trial adoption period with animal before committing to adoption</td>
<td>116</td>
<td>123</td>
<td>120</td>
<td>116</td>
</tr>
<tr>
<td>Person / Service to match pets that fit your needs / lifestyle / preferences</td>
<td>83</td>
<td>87</td>
<td>84</td>
<td>85</td>
</tr>
<tr>
<td>Adoption event / fair in a large park featuring pets available for adoption</td>
<td>84</td>
<td>73</td>
<td>77</td>
<td>85</td>
</tr>
<tr>
<td>Online tools to match pets that fit your needs / lifestyle / preferences</td>
<td>80</td>
<td>78</td>
<td>79</td>
<td>80</td>
</tr>
<tr>
<td>Ability to complete paperwork online before arriving at facility</td>
<td>76</td>
<td>64</td>
<td>68</td>
<td>79</td>
</tr>
<tr>
<td>Access to an animal trainer through an animal rescue</td>
<td>71</td>
<td>70</td>
<td>76</td>
<td>57</td>
</tr>
<tr>
<td>Online source that can find specific breeds available for adoption</td>
<td>58</td>
<td>81</td>
<td>73</td>
<td>54</td>
</tr>
<tr>
<td>1 month of complimentary pet insurance</td>
<td>56</td>
<td>57</td>
<td>55</td>
<td>60</td>
</tr>
<tr>
<td>Transportation service that will bring any pet to you from anywhere in the U.S.</td>
<td>52</td>
<td>50</td>
<td>54</td>
<td>45</td>
</tr>
<tr>
<td>Concierge service pre-selects 4 pets to choose from based on top criteria</td>
<td>36</td>
<td>37</td>
<td>37</td>
<td>35</td>
</tr>
</tbody>
</table>

**Note:** Top & bottom rated features were consistent across generations!
Key Takeaways & Consumer-Perspective Recommendations for Consideration
• There is a **significant gap between those interested in adopting a pet and those that do**, creating an opportunity to increase adoptions.

• **Online resources are an important tool** when researching a new pet.

• Pet **purchasers** are more likely to obtain a **younger and purebred or cross breed pet**.

• **Rescues/shelters have higher positive impressions** and lower negative impressions than breeders and pet stores...even among purchasers. This doesn’t appear to be a barrier issue.

• While negative perceptions of rescues or shelters isn’t the primary challenge, many have **negative experience with the adoption process itself**.
  – Too much paperwork / lengthy application process / strict requirements
  – High adoption fees
  – No response / lack of follow up
  – Overcrowded
  – Not conveniently located

• There is relatively **low awareness about the number of animals dying in shelters**. Knowing the numbers **increases the likelihood of adopting in the future**.
• Overall, **pet characteristics outweigh breed** (even among purchasers, though purchasers are more concerned with breed than adopters).

• Traits pet owners are looking for include: **good heath, friendly/compatible with other animals, compatible with children, mild/calm temperament.**
  – For **purchasers, puppy/kitten and specific breed** is also important.
  – For adopters, housebroken and spay/neutered is also important.

• Those that ultimately **purchase are motivated by:**
  – **Specific breed**
  – **Prior bad experience with a rescue** (strict rules/requirements, prior rejection, long process, slow/no feedback)
  – Want to **avoid perceived medical issues** with dog/cat & **avoid the unknown**
  – Looking for **specific traits such as no shedding/low allergen breed**
  – Interested in a **quicker process**
Key Takeaways, cont.

- When evaluating opportunities to help eliminate adoption barriers, two key themes emerge: **make adoption easier and remove uncertainty**.
  - Ability to **spend time with animals in a private area at the facility** *(makes adoption easier and removes uncertainty by spending time with the animal to get a feel for temperament and fit with the family)*
  - **Standardized behavioral / medical checklist** with key information *(removes uncertainty about potential health/behavior issues)*
  - Ability to **take pet home the same day** *(ease of adoption)*
  - Ability to **search database of pets for adoption with all of their information** *(ease of adoption / finding adoptable pets)*
  - **Access to a veterinarian** to discuss animal’s health *(removing uncertainty)*
  - **Trial adoption period** with animal before committing to adoption *(makes adoption easier/less risky and removes uncertainty by spending time with the animal to get a feel for temperament and fit with the family)*
## Respondent Profile

(Note: Remember these were people who acquired a pet in past year & considered multiple sources)

<table>
<thead>
<tr>
<th></th>
<th>Adopters</th>
<th>Purchasers</th>
<th>Dogs</th>
<th>Cats</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>38%</td>
<td>44%</td>
<td>42%</td>
<td>37%</td>
</tr>
<tr>
<td>Female</td>
<td>62%△</td>
<td>56%</td>
<td>58%</td>
<td>63%</td>
</tr>
<tr>
<td><strong>Age Groups</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Millennials (18 to 34)</td>
<td>48%△</td>
<td>39%</td>
<td>45%</td>
<td>44%</td>
</tr>
<tr>
<td>Gen X (35 to 51)</td>
<td>36%</td>
<td>41%</td>
<td>38%</td>
<td>40%</td>
</tr>
<tr>
<td>Boomers (52 to 70)</td>
<td>15%</td>
<td>20%△</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td><strong>Average Age</strong></td>
<td>38</td>
<td>41△</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td><strong>Marital Status</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Married</td>
<td>60%</td>
<td>66%</td>
<td>62%</td>
<td>63%</td>
</tr>
<tr>
<td>Children LT 18 in HH</td>
<td>68%</td>
<td>76%△</td>
<td>72%</td>
<td>66%</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bach Degree or higher*</td>
<td>55%</td>
<td>59%</td>
<td>56%</td>
<td>58%</td>
</tr>
<tr>
<td><strong>Employment Status</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employed Full-Time</td>
<td>70%</td>
<td>72%</td>
<td>71%</td>
<td>70%</td>
</tr>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median HH Income</td>
<td>$75,361</td>
<td>$81,177</td>
<td>$78,944</td>
<td>$73,462</td>
</tr>
<tr>
<td>Hispanic</td>
<td>13%△</td>
<td>8%</td>
<td>11%</td>
<td>10%</td>
</tr>
</tbody>
</table>

△ Significantly higher than other group

* Among non-students
Pet Owner Snapshot
(Note: Based only on those in our study...acquired pet in past 12 months and considered multiple sources)

Pet owners in this research represent the following:

<table>
<thead>
<tr>
<th>Adopters</th>
<th>Purchasers</th>
</tr>
</thead>
<tbody>
<tr>
<td>More female, young, single</td>
<td>Slightly older</td>
</tr>
<tr>
<td>Non-white / Hispanic</td>
<td>Have kids at home</td>
</tr>
<tr>
<td>More likely to rent their homes than Purchasers</td>
<td>Skew more towards rural areas</td>
</tr>
<tr>
<td>Live primarily in suburban areas</td>
<td>Own their homes</td>
</tr>
</tbody>
</table>

Note of caution: The objective of the study was not to obtain a profile of adopters vs. purchasers. We have this information available from prior research if interested.23

Paid an average of $135
- 61% Adopted
- 39% Purchased
Paid an average of $450

- Were willing to spend more than they actually did
- Considered multiple acquisition methods
- Were willing to travel 100 miles to find the right pet
- Interacted with Shelters, Rescues, and Pet Stores in person
- Interacted with Breeders and Individual Sellers online

Dogs
- More single-family home dwellers

Cats
- More condo dwellers
- Least likely to vote in the election

- Skew: young (median = 39), female, married, children at home, and employed
- Live in suburban areas, in single-family homes, and homes that they own
Millennials are more likely to consider all options (except animal control / shelter / pound) than any other generations.

### Where obtained...

<table>
<thead>
<tr>
<th></th>
<th>TOTAL</th>
<th>Millennials (18 to 34)</th>
<th>Gen X (35 to 51)</th>
<th>Boomers (52 to 70)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ADOPTED [NET]</strong></td>
<td>61.3</td>
<td>66.5</td>
<td>58.2</td>
<td>54.3</td>
</tr>
<tr>
<td>Animal rescue but not during a visit to a pet supply store (e.g., Petco or PetSmart)</td>
<td>18.6</td>
<td>17.7</td>
<td>17.4</td>
<td>23.8</td>
</tr>
<tr>
<td>Animal rescue while visiting a pet supply store (e.g., Petco or PetSmart)</td>
<td>16.6</td>
<td>18.8</td>
<td>15.6</td>
<td>13.4</td>
</tr>
<tr>
<td>Animal Control / Shelter / City Pound</td>
<td>26.0</td>
<td>30.1</td>
<td>25.1</td>
<td>17.1</td>
</tr>
<tr>
<td><strong>PURCHASED [NET]</strong></td>
<td>38.7</td>
<td>33.5</td>
<td>41.8</td>
<td>45.7</td>
</tr>
<tr>
<td>Individual advertising a (dog / cat) for sale</td>
<td>15.2</td>
<td>13.5</td>
<td>17.8</td>
<td>13.7</td>
</tr>
<tr>
<td>Breeder</td>
<td>14.7</td>
<td>11.5</td>
<td>13.8</td>
<td>25.1</td>
</tr>
<tr>
<td>Pet store</td>
<td>8.9</td>
<td>8.5</td>
<td>10.2</td>
<td>6.9</td>
</tr>
</tbody>
</table>

**Millennials are more likely to have adopted the pet they acquired in the past 12 months.**

### Seriously considered...

<table>
<thead>
<tr>
<th></th>
<th>TOTAL</th>
<th>Millennials (18 to 34)</th>
<th>Gen X (35 to 51)</th>
<th>Boomers (52 to 70)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ADOPTED [NET]</strong></td>
<td>86.7</td>
<td>85.0</td>
<td>86.4</td>
<td>91.3</td>
</tr>
<tr>
<td>Animal rescue but not during a visit to a pet supply store (e.g., Petco or PetSmart)</td>
<td>46.3</td>
<td>49.1</td>
<td>43.7</td>
<td>45.2</td>
</tr>
<tr>
<td>Animal rescue while visiting a pet supply store (e.g., Petco or PetSmart)</td>
<td>45.7</td>
<td>49.0</td>
<td>44.3</td>
<td>40.3</td>
</tr>
<tr>
<td>Animal Control / Shelter / City Pound</td>
<td>54.8</td>
<td>51.9</td>
<td>56.3</td>
<td>59.0</td>
</tr>
<tr>
<td><strong>PURCHASED [NET]</strong></td>
<td>78.9</td>
<td>82.4</td>
<td>78.2</td>
<td>71.3</td>
</tr>
<tr>
<td>Pet store</td>
<td>40.7</td>
<td>47.1</td>
<td>38.3</td>
<td>29.4</td>
</tr>
<tr>
<td>Individual advertising a (dog / cat) for sale</td>
<td>37.0</td>
<td>40.5</td>
<td>36.0</td>
<td>30.3</td>
</tr>
<tr>
<td>Breeder</td>
<td>32.3</td>
<td>36.2</td>
<td>28.4</td>
<td>31.0</td>
</tr>
</tbody>
</table>