



September 2012
Adopter Survey

Aggregate Results

Pethealth conducted a comprehensive adopter survey in September 2012 designed to address three key objectives;

1. Determining the post adoption behaviors and veterinary services preferences of those who adopt from an animal welfare organization (AWO) and those who adopt at a pet specialty retailer
2. Determining what influences a new pet adopter's selection of veterinary care for their new pet
3. Determining the degree to which veterinary clinics' influence new pet owner decisions for post adoption purchases of wellness programs and general pet pharmacy products

The survey distribution was compiled using new pet adopter data collected through AWOs using our own industry leading PetPoint application for the period July 2011 to July 2012.

Launched in 2005, PetPoint is a cloud-based animal management application developed specifically for AWOs, and allows Pethealth to aggregate more data on dogs and cats in AWOs than any other company. As the most widely used application in animal welfare, licensed by over 1,900 AWOs, it is one of the industries largest and most accurate repositories of information related to the animal welfare industry, and is now widely regarded by leading industry analysts as the leading source of data relating to AWOs.

Data variables used to define the survey group included, though were not limited to:

- Adoption Location, i.e. Petco, Petmart, Private Humane Society/SPCAs, Municipal Animal Control/Shelters, Rescue Groups/Breed Placement
- Adopter First Name
- Adopter Last Name
- Animal Name
- Adoption Date
- Email Address

The resultant dataset was then segmented based on two variables; AWO adoption partners and the location of adoptions. Based on these two variables the data was segmented into 7 collector groups for distribution, as follows;

Group	AWO Adoption Partner	Location of Adoption
1	Petsmart	AWO
2	Petsmart	Petsmart
3	Petco	AWO
4	Petco	Petco
5	Petsmart and Petco	AWO
6	Petsmart and Petco	Petsmart
7	Petsmart and Petco	Petco

Survey invitations were delivered to approximately 290,000 adopters. Invitations were incentivized with an offer of \$25 toward the purchase of pet food or pet supplies from online pet specialty and retail site, ThePetangoStore.com.

Invitations were distributed to each of the 7 survey collector groups and included a URL unique to each group. The survey of 47 total questions was conducted online and developed with “skip logic” to ensure respondents were only presented questions based on their previous responses.

Of the nearly 246,000 survey invitations successfully delivered, over 52,000 were opened (21% open rate), and over 10,000 respondents, or over 19% of those who opened an invitation completed the survey.

- Nearly 60% of respondents indicated that they had other dogs or cats at home prior to adopting their new pet
- Approximately 46% of respondents indicated their adoption fee to be under \$100
- 81% of respondents did not receive any pet medications at the point of adoption
- Nearly 71% of respondents indicated that their adoption counsellor recommended an immediate health or wellness check-up for the newly adopted pet; however, 62% of respondents indicated that no clinic was referred to them by the same adoption counsellor
- Approximately 60% of adopters reported taking their newly adopted pet to a veterinary clinic within the first 7 days after adoption, with over 21% indicating that they had visited a vet clinic within the first 3 days
- Approximately 15% of adopters chose either a VCA Animal Hospital or a Banfield Pet Hospital to take their newly adopted pet to for the first clinic visit; 6% took their pet to a clinic owned or operated by the animal welfare organization from which they adopted their pet
- Approximately 77% of respondents indicated that the reason for their pet's first visit to a clinic was for a post-adoption check-up, routine wellness assessment and/or vaccinations
- 58% of respondents said that they chose their clinic for their newly adopted pet on the basis of a previous relationship with a veterinary clinic

- Approximately 80% of adopters indicated that the cost of their first visit to the veterinary clinic was under \$200
- Approximately 56% of adopters indicated that the clinic recommended a wellness plan for their pet
- Approximately 49% of respondents indicated making 2 or more visits to a clinic with their adopted pet in the last 12 months
- 42% of respondents indicated that they had spent in excess of \$200 in veterinary care for their adopted pet in the last 12 months
- Approximately 74% indicated that they have purchased preventative treatment such as flea and tick medication for their pet in the last 12 months and 56% indicated that they had required prescription medication for their pet in the past year
- Approximately 78% of respondents indicated that they purchased their pet medications through their veterinary clinic; approximately 8% had purchased their pet medication online, and approximately 7.5% had purchased their pet medications through a pet specialty retail location

Select Questions -Top 5 Responses where indicated by *	Response Results
1 Have you adopted a cat or dog in the last 12 months? yes no	91.5% 8.5%
2 How many pets have you adopted in the last 12 months? 1 2 More than 2	76.8% 18.9% 4.3%
3 Did you adopt a dog or cat? Dog(s) Cat(s) Both Dog(s) and Cat(s)	55.5% 39.3% 5.2%
4 Did you have other dogs or cats at home before adopting your new pet(s)? Yes No	59.5% 40.5%
5 How old is your new pet(s)? 1- 12 Months 1 - 2 Years 3 - 5 Years 6 - 8 Years Older than 8 years	35.5% 39.2% 17.4% 5.2% 2.8%
6 Please tell us where you adopted your pet from; Humane Society/SPCA Rescue Group PetSmart Store Animal Control Organization PETCO Store	48.8% 27.3% 11.7% 8.6% 3.5%
7 Please indicate your total adoption fees (per single pet adopted in the past 12 months),excluding the purchase of any pet products at the time of adoption*: \$0-49 \$50-99 \$100-149 \$150-199 \$200-249	17.8% 28.6% 23.2% 12.7% 6.5%
8 Did you receive any medication for your new pet(s) at the point of adoption? No Yes	80.9% 19.1%
9 What type of medication did your pet receive (more than one answer may be selected)? Full prescription, e.g. Heartworm, Pain relief Preventative or treatment (full dose supply), e.g. Flea & Tick Sample, i.e. a single or limited supply dose of preventative treatment from the manufacturer	52.3% 33.3% 25.6%
10 At the time of adoption, did your adoption counselor recommend an immediate health or wellness checkup for your newly adopted pet(s)? Yes No	70.5% 29.5%

12	Was a veterinary clinic referred to you when you adopted your pet(s)?	
	No	62.0%
	Yes	38.0%
13	Have you sought veterinary care for your pet(s) since adopting?	
	Yes	84.4%
	No	15.6%
14	How long after you adopted did you take your pet(s) for their first veterinary clinic visit?*	
	0 - 3 Days	21.4%
	4 - 7 Days	38.2%
	2 - 4 Weeks	24.2%
	1 - 3 Months	10.6%
	3 - 6 Months	3.5%
15	Which veterinary clinic did you choose for your pet?	
	VCA Animal Hospitals	8.0%
	Adjacent to or part of the shelter I adopted from	5.9%
	Banfield Pet Hospitals	4.2%
	Petsmart Pet Hospital (Operated by Banfield)	3.0%
	Other (please specify)	78.8%
16	During your veterinary visit to the Banfield clinic at Petsmart, did you also make a purchase?	
	Yes	70.3%
	No	29.7%
17	Please tell us what you purchased (more than one answer may be selected)?*	
	Food/treats	79.3%
	Toys	67.4%
	Collars/Leashes	54.1%
	Bedding	27.7%
	Grooming	26.4%
18	What was the primary reason for your pet's visit to the veterinary clinic?*	
	Post adoption check-up	43.7%
	Routine wellness	19.3%
	Vaccination	14.3%
	Respiratory illness	6.1%
	Other (please specify)	12.8%
19	How did you learn of your veterinary clinic?*	
	Previous or existing client of the clinic	58.0%
	It was referred to me at adoption	15.2%
	Word of mouth	14.1%
	Internet search	7.2%
	The clinic is located where I purchase my pet food and pet supplies	3.0%
20	Which factor(s) most influenced your selection of a veterinary clinic (more than one answer may be	
	Previous or existing client of clinic	54.4%
	Location	45.3%
	Word of mouth	21.0%
	Specialization/expertise	14.0%
	Availability of low cost vaccinations	12.7%

21	Using the descriptions below, please rate your veterinary clinic experience;	
	Very Positive	62.4%
	Positive	30.8%
	Neutral	5.5%
	Poor	1.0%
	Very Poor	0.3%
22	What was the cost of your veterinary care including any medication or other purchases?*	
	\$0 - \$99	46.7%
	\$100 - \$199	33.9%
	\$200 - \$299	10.5%
	\$300 - \$399	4.0%
	More than \$500	3.6%
23	Do you feel you received good value for what you paid for your veterinary care?	
	Yes	91.8%
	No	8.2%
24	Did your veterinary clinic offer or recommend a wellness plan/program for your pet?	
	Yes	55.6%
	No	44.4%
25	How many times since your adoption has your pet required veterinary care?	
	1	51.6%
	2	24.5%
	3	13.1%
	4	5.1%
	More than 4	5.8%
26	Did you take your pet to the same veterinary clinic for subsequent care?	
	Yes	88.7%
	No	11.3%
27	Please tell us why you changed veterinary clinics (more than one answer may be selected)?	
	Cost	32.0%
	Location	29.7%
	Quality of service	24.0%
	Other (please specify)	45.6%
28	How much do you estimate you have spent in total this past year in veterinary care for your pet(s)?*	
	\$0 - \$99	16.4%
	\$100 - \$199	20.2%
	\$200 - \$299	16.0%
	\$300 - \$399	12.8%
	More than \$800	12.6%
29	Would you be interested in knowing that your veterinary clinic utilized an electronic/online storage service for your pet(s) medical records, which would facilitate faster and easier sharing of information with you, and	
	Yes	64.0%
	No	36.0%

36	Since your pet's first veterinary appointment have you purchased any pet medication for your pet?	
	Yes	53.3%
	No	46.7%
37	Please tell us what type of medication you purchased for your pet(s) (more than one answer may be selected)?	
	Preventative or treatment, e.g. Flea & Tick	73.7%
	Full prescription, e.g. Pain relief, Heartworm	56.2%
	Other (please specify)	24.3%
38	Please tell us where you purchased your pet's medication from;	
	Veterinary clinic	77.7%
	Online	8.1%
	Pet specialty retailer	7.4%
	Other (please specify)	6.7%
39	Please tell us which pet specialty retailer you purchased your pet's medication from?*	
	PetSmart	48.1%
	PETCO	21.7%
	Wal-Mart	9.6%
	Pet Supplies Plus	3.2%
	Other (please specify)	13.4%
40	Please tell us which online store you purchased your pet's medication from?*	
	1800PetMeds.com	25.8%
	PetSmart.com	13.1%
	PetCareRx.com	7.1%
	Drsfostersmith.com	6.9%
	Other (please specify)	38.4%
41	Do you recognize and celebrate your pet(s) "Birthday"?	
	Yes	71.8%
	No	28.2%
42	Would you be more inclined to shop with a retailer that offers a birthday program for your pet, than one which does not?	
	Yes	55.3%
	No	44.7%

43	Are you male or female?	
	Female	82.3%
	Male	17.7%
44	Which category below includes your age?*	
	21-29	25.2%
	30-39	17.7%
	40-49	20.9%
	50-59	18.8%
	60 or older	15.1%
45	What is the highest level of school you have completed or the highest degree you have received?	
	Bachelor degree	36.9%
	Some college but no degree	31.2%
	Graduate degree	20.1%
	High school degree or equivalent (e.g., GED)	11.0%
	Less than high school degree	0.8%
46	Which of the following categories best describes your employment status?	
	Employed	73.9%
	Retired	12.3%
	Unemployed	10.0%
	Disabled; not able to work	3.7%
47	What is your current total household income?*	
	\$34,999 or less	28.2%
	\$35,000 to \$59,999	26.9%
	\$60,000 to \$79,999	16.8%
	\$80,000 to \$99,999	10.9%
	\$100,000 to \$149,999	11.3%