

Consumer Adoption Research Analysis

Goals: (1) Determine reasons for pet adoption declines and (2) provide insights for shelters to help them improve adoption rates.

About the data:

- **Survey** conducted in March 2022 (field dates: March 7-9, 2022)
- **Raw data file** provided by vendor
- **856 respondents** eligible to take the survey

Background

A survey was conducted by The Tarrance Group to gather insights about pet adoption behavior and attitudes. See Appendix A for a summary of survey questions. The results below pertain only to survey respondents who considered or actually did acquire a pet in the last 12 months.

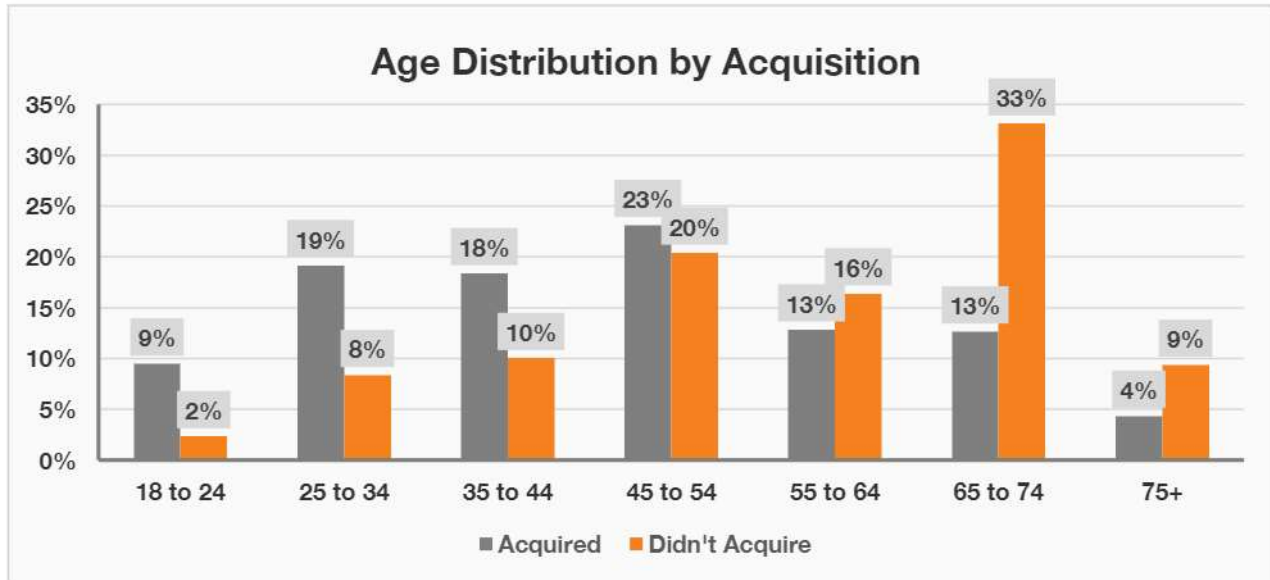
Data Insights

- Older populations made the decision about which pet to acquire more quickly than younger groups.
- Of those who acquired a pet, 70% acquired dogs and 30% acquired cats.
 - More dogs were acquired from an animal welfare organization than cats.
- Cats are hardly ever acquired from a breeder.
- People who acquired from a breeder are statistically¹ younger than those who acquired pets from an animal welfare organization.
 - However, younger groups tended to take longer to acquire a pet than older groups.
- Quicker decisions to acquire a pet were more likely to be for cats than dogs.
- For those who took longer than one month to acquire a pet, most of the time it was because they couldn't find the pet they were looking for.
- A person's employment situation typically did not account for delays in acquiring a pet. The most common reason for a delay in acquiring a pet was due to not being able to find a pet that fit the person's lifestyle (more so for dogs than cats).

¹ Mann-Whitney U p-value .023

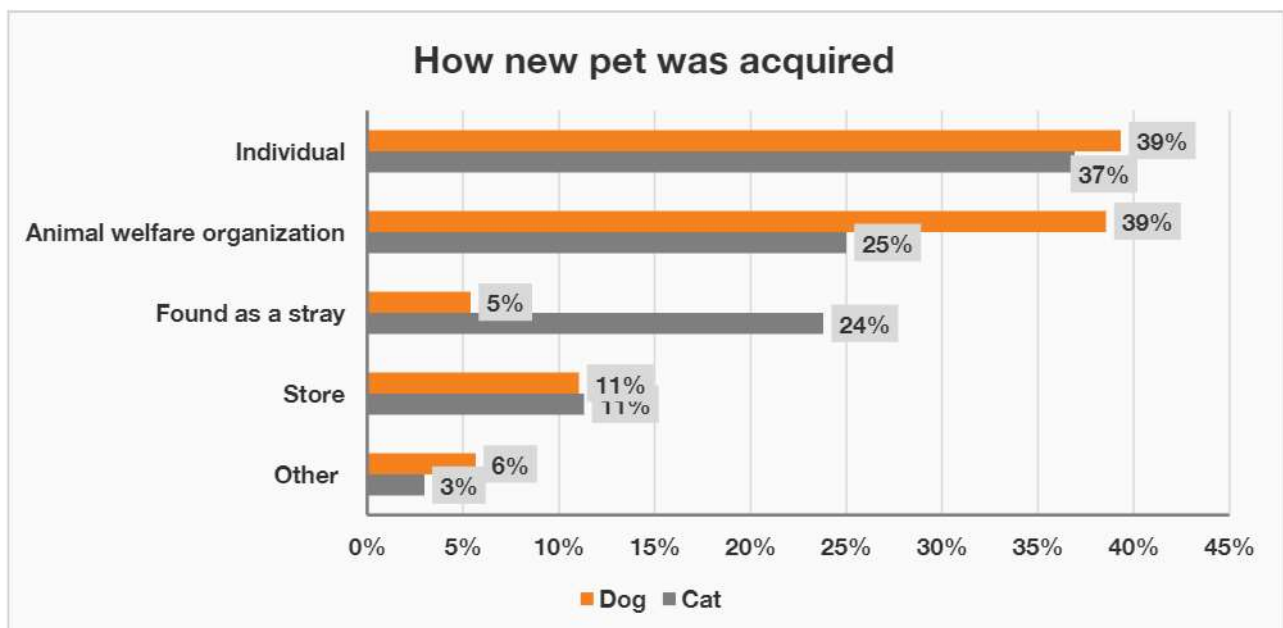
Deeper Dive

Pet acquisition. Of those who acquired a pet in the last 12 months, 70% acquired a dog; 30% acquired a cat. Of those who considered acquiring a pet in the last year, younger groups were more likely to have actually acquired a pet. Of those who considered acquiring a pet but did not in the end, almost 60% of them were 55 or older.

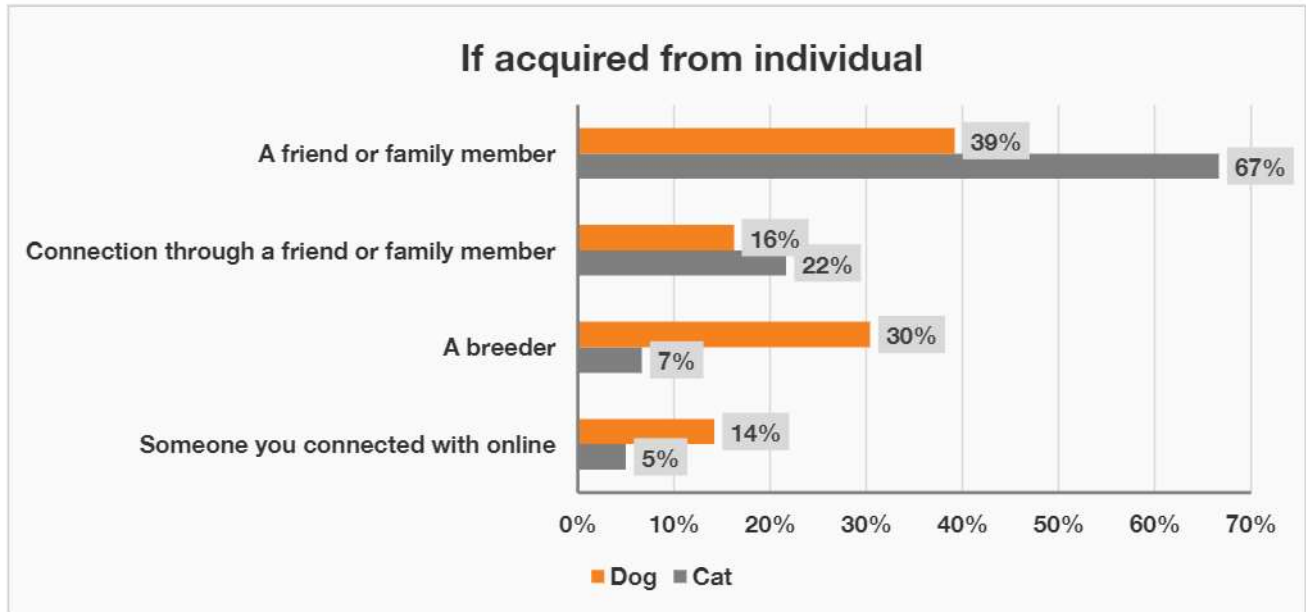


Of those who weren't considering acquiring a pet in the last year, 10% did actually end up acquiring a pet — mostly dogs (60%) and mostly from an individual (50%), but rarely a breeder.

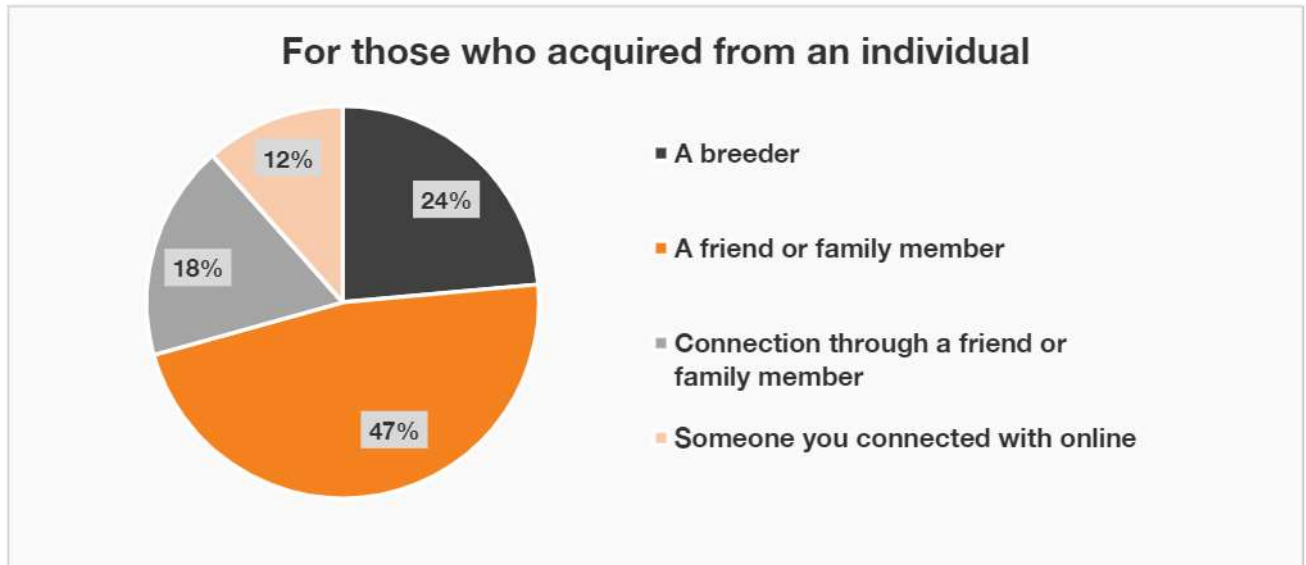
Sources of pet acquisition. Dogs were mostly either acquired from an individual or an animal welfare organization. More dogs were acquired from an animal welfare organization than cats. More cats were found as strays and more cats were acquired from an individual than any other source.



Regarding the pets acquired from an individual, 67% of cats and 39% of dogs were acquired from a friend or family member. And 30% of dogs were acquired from a breeder. Cats were hardly ever acquired from a breeder (only 7%). Interestingly, 14% of dogs acquired from an individual were from someone that survey respondents connected to online.

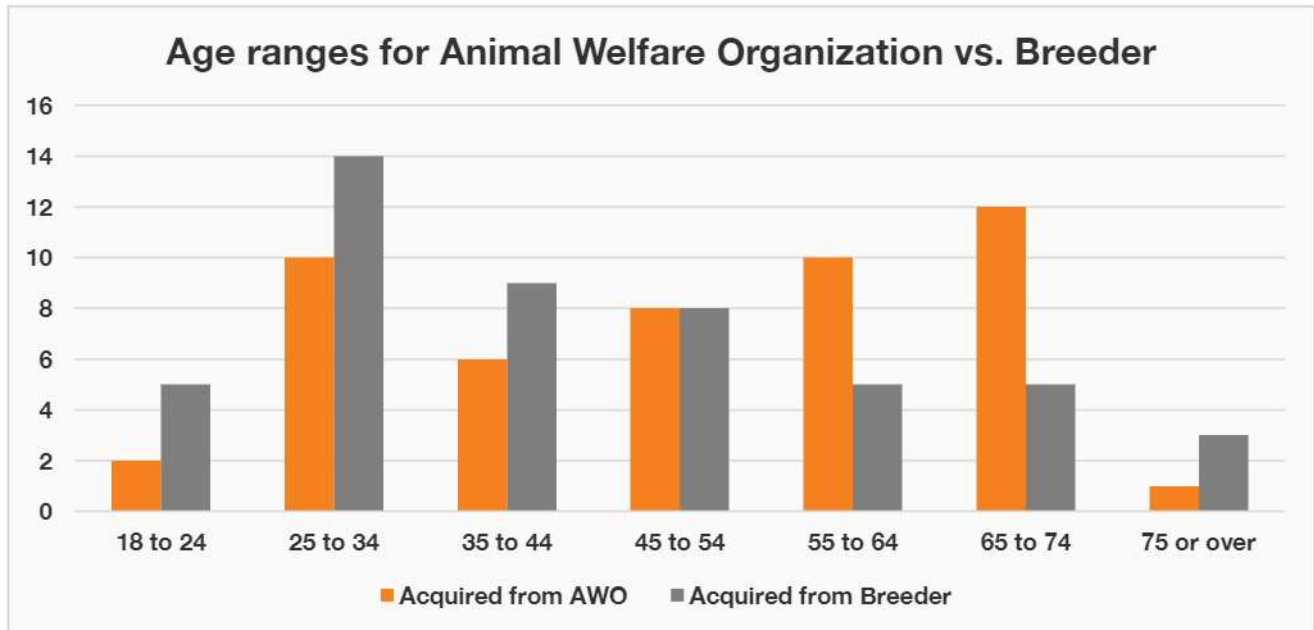


Acquisition from a breeder. Regarding pets acquired from an individual, 47% were from a friend or family member. However, 24% of those who acquired a pet from an individual acquired their pet from a breeder.



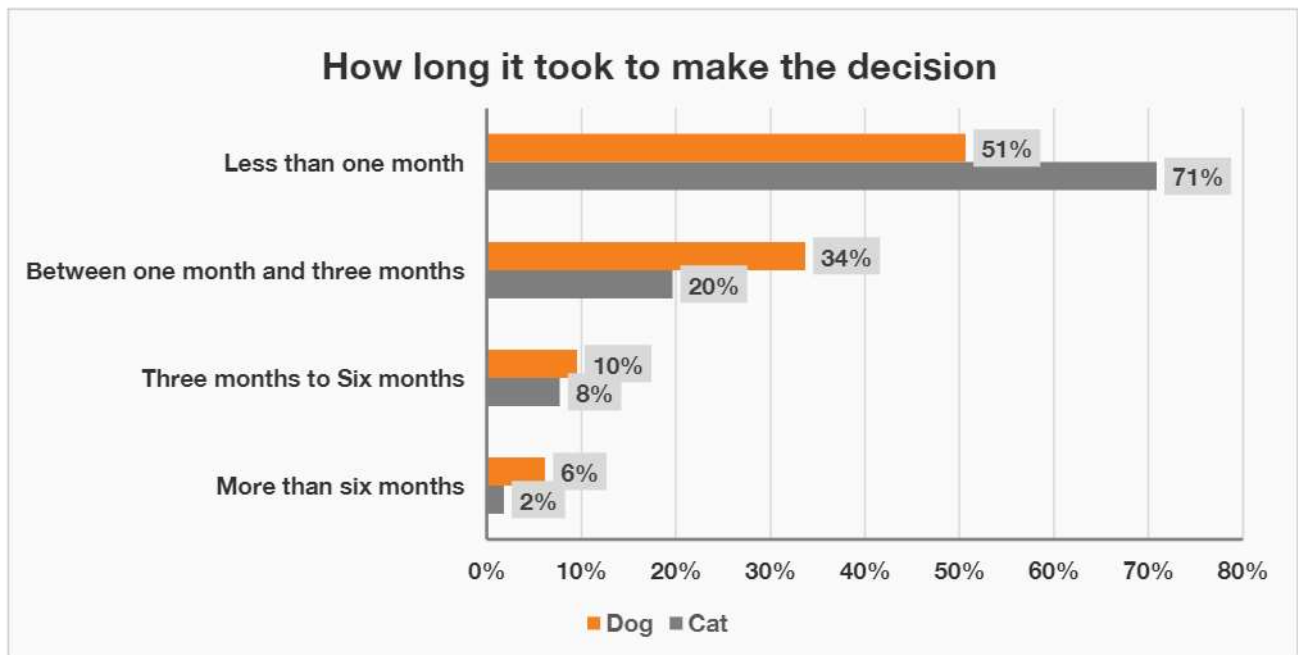
Those who acquired pets from a breeder are statistically² younger than those who acquired pets from an animal welfare organization (40 vs. 50 years of age on average, respectively).

² Mann-Whitney U p-value .023

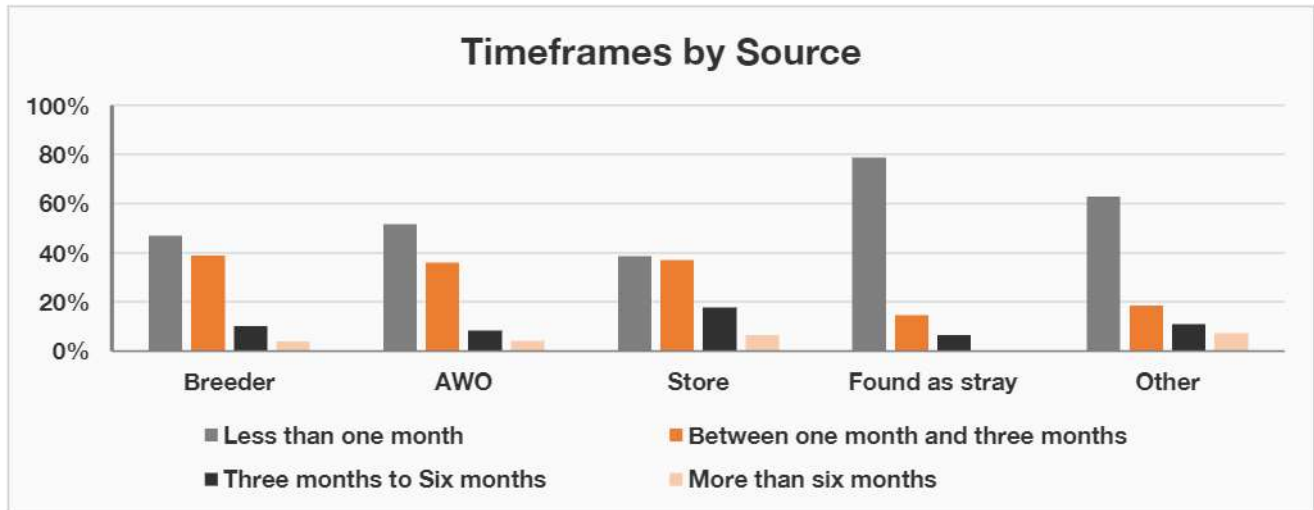


There was no difference in gender between those who acquired from an individual and those who acquired from an animal welfare organization.

Making the decision. Of those who acquired a pet, 57% made the decision in less than one month from the time when they first started looking, and 86% made the decision within three months. Decisions that were made in less than one month were more likely to be for cats than dogs (71% for cats vs. 51% for dogs).

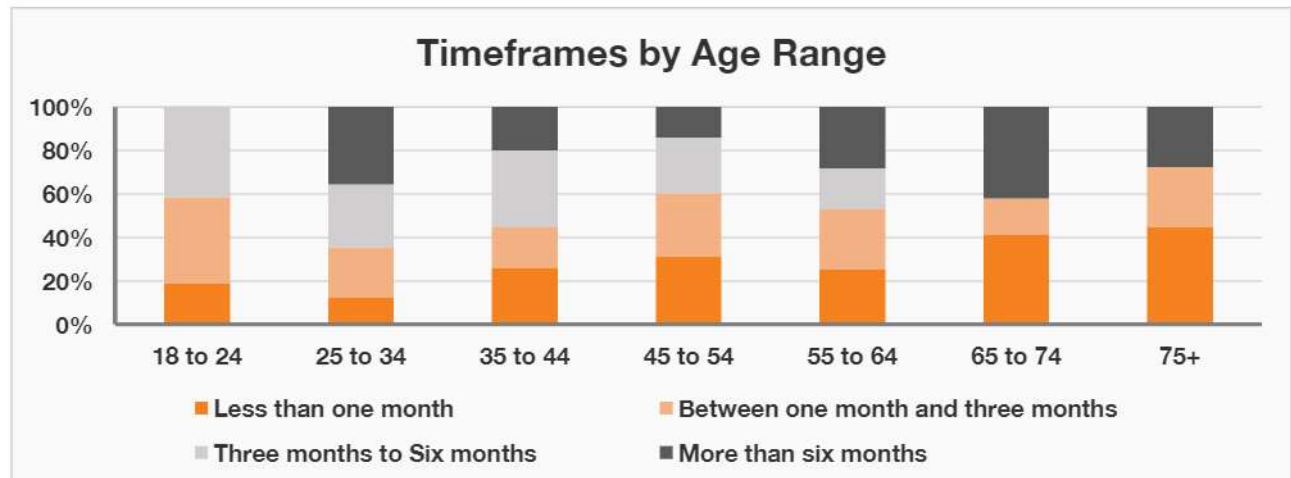
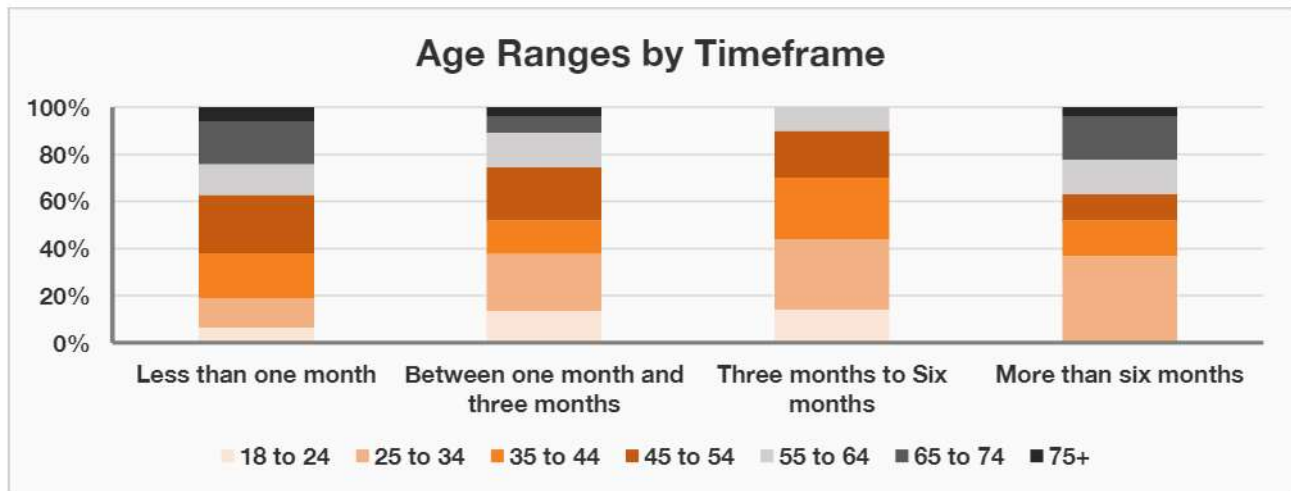


Most acquisitions were made in three months, but acquisitions from animal welfare organizations were slightly higher in the first month compared to those who acquired from a breeder (not just an individual, but an actual breeder). For those who acquired a pet as a stray, almost 80% of those acquisitions were made in the first month.

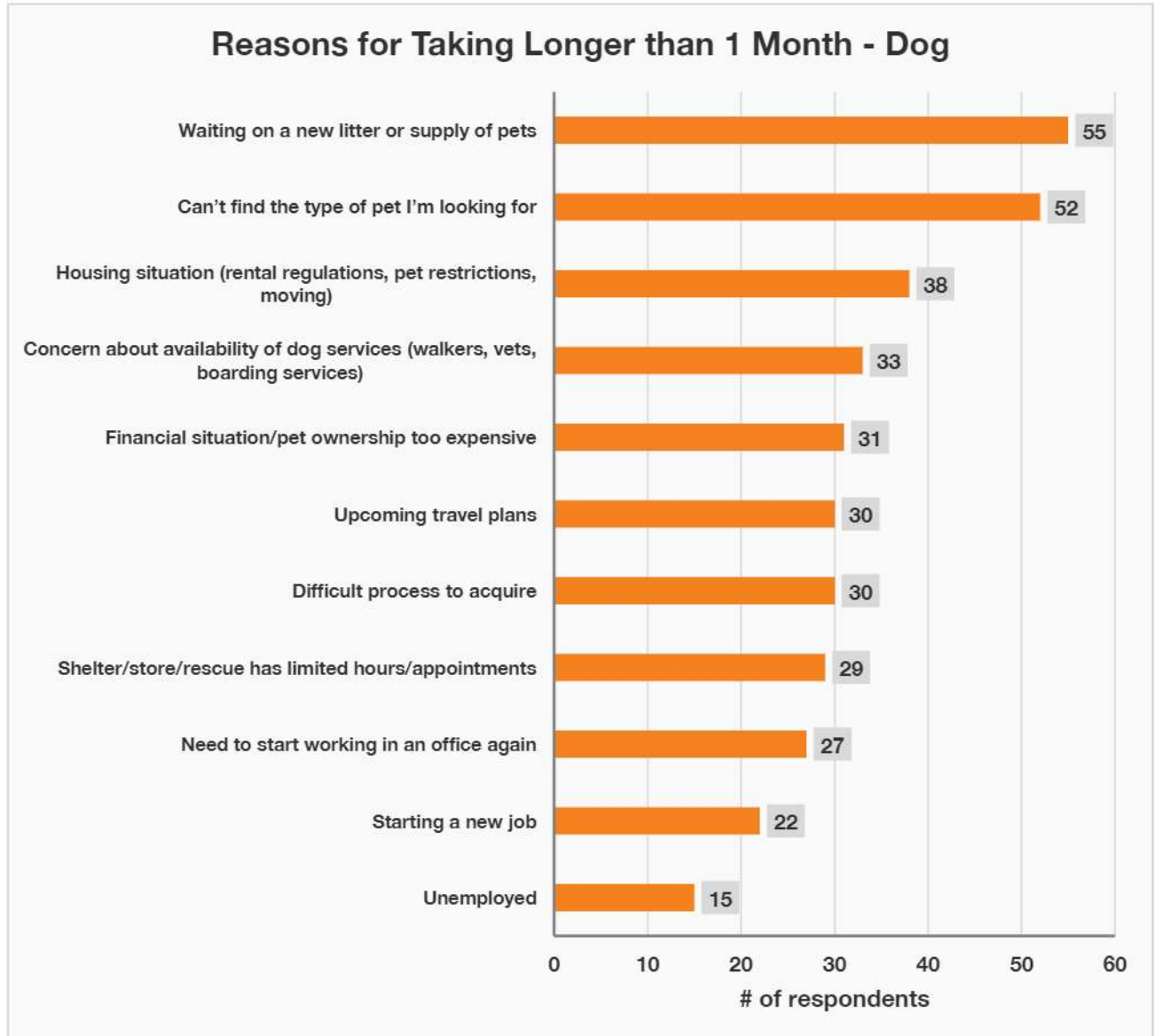


For those who acquired their pet as a stray, most had considered acquiring a pet in the last year (85% of those who acquired a cat and 95% of those who acquired a dog).

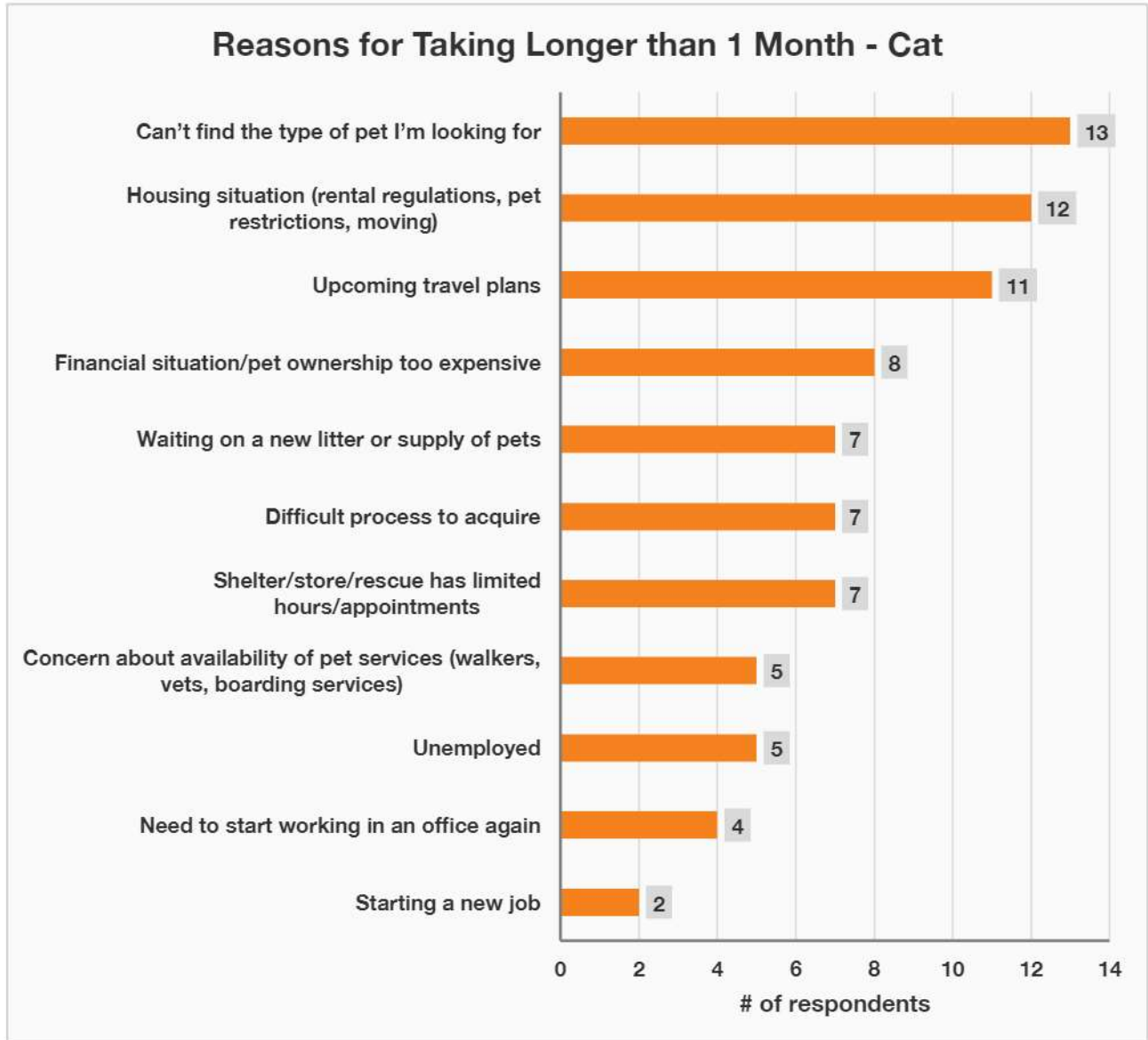
Age ranges and timeframes. Younger groups tended to take longer to acquire a pet than older groups. Of those under 35, 37% acquired their pet after more than six months, compared to 19% acquiring a pet in less than one month.



Reasons for delays. For those who took longer than one month to acquire a dog, most of the time it was because they were waiting for a new litter or supply, or because they couldn't find the type of dog they were looking for. Starting a new job or being unemployed were the least common reasons for the delays in acquiring a dog.

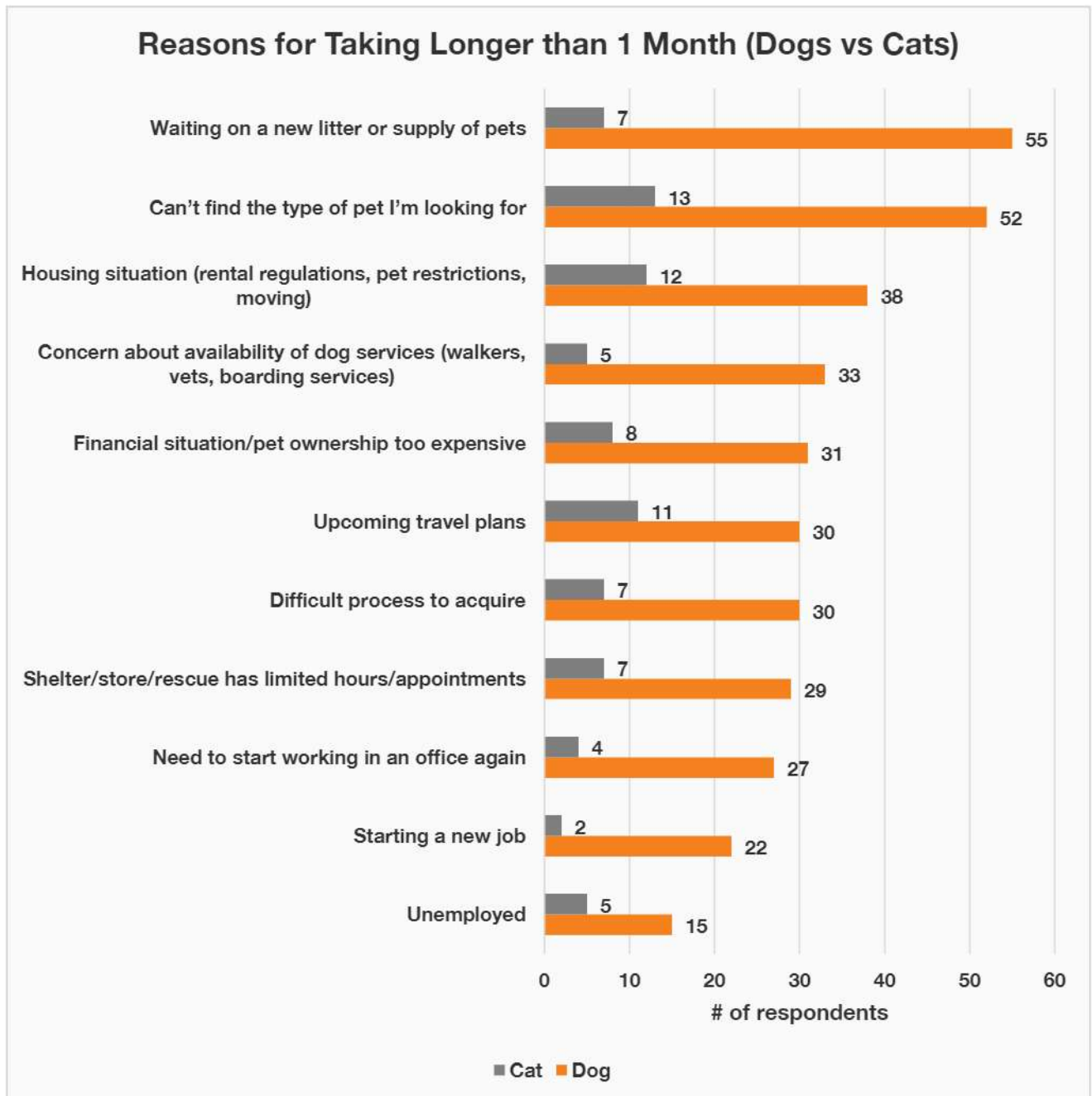


For those who took longer than one month to acquire a cat, most of the time it was because they couldn't find the cat they were looking for or because of their housing situation (people could select multiple reasons). Job situations as reasons for the delays in acquiring a new cat were the least common.



When comparing delays for cats vs. dogs, housing situations and upcoming travel were more commonly selected for cats than dogs. Also, not surprisingly, the delays due to waiting for a new litter or supply were more common for those who acquired a dog rather than a cat. Concerns over availability of pet services were more common for those who acquired dogs.

Most acquisitions were of dogs (70%); 30% acquired cats. Regarding delays, 80% of respondents delayed acquiring their dog; 20% delayed acquiring their cat.



The delay reasons also varied by age group. Below are the top three and bottom three reasons by age group. Age groups 45+ had more concerns about finding the type of pet they were looking for compared to younger age groups. Interestingly, delays related to unemployment did not seem to be concerning for any specific age group and was more generally not a reason for not acquiring a pet in the first month.

| Top 3 | | | | | | |
|---|--|--|--|--|---|---|
| 18 to 24 | 25 to 34 | 35 to 44 | 45 to 54 | 55 to 64 | 65 to 74 | 75+ |
| Starting a new job | Waiting on a new litter or supply of pets | Financial situation/pet ownership too expensive | Can't find the type of pet I'm looking for | Can't find the type of pet I'm looking for | Can't find the type of pet I'm looking for | Waiting on a new litter or supply of pets |
| Waiting on a new litter or supply of pets | Housing situation (rental regulations, pet restrictions, moving) | Housing situation (rental regulations, pet restrictions, moving) | Waiting on a new litter or supply of pets | Waiting on a new litter or supply of pets | Financial situation/pet ownership too expensive | Financial situation/pet ownership too expensive |
| Difficult process to acquire | Upcoming travel plans | Waiting on a new litter or supply of pets | Difficult process to acquire | Housing situation (rental regulations, pet restrictions, moving) | Waiting on a new litter or supply of pets | Difficult process to acquire |

| Bottom 3 | | | | | | |
|---|--|--|-----------------------|---|--|--|
| 18 to 24 | 25 to 34 | 35 to 44 | 45 to 54 | 55 to 64 | 65 to 74 | 75+ |
| Shelter/store/rescue has limited hours/appointments | Starting a new job | Need to start working in an office again | Unemployed | Shelter/store/rescue has limited hours/appointments | Unemployed | Unemployed |
| Financial situation/pet ownership too expensive | Need to start working in an office again | Starting a new job | Upcoming travel plans | Unemployed | Need to start working in an office again | Need to start working in an office again |
| Unemployed | Unemployed | Unemployed | Starting a new job | Starting a new job | Starting a new job | Starting a new job |

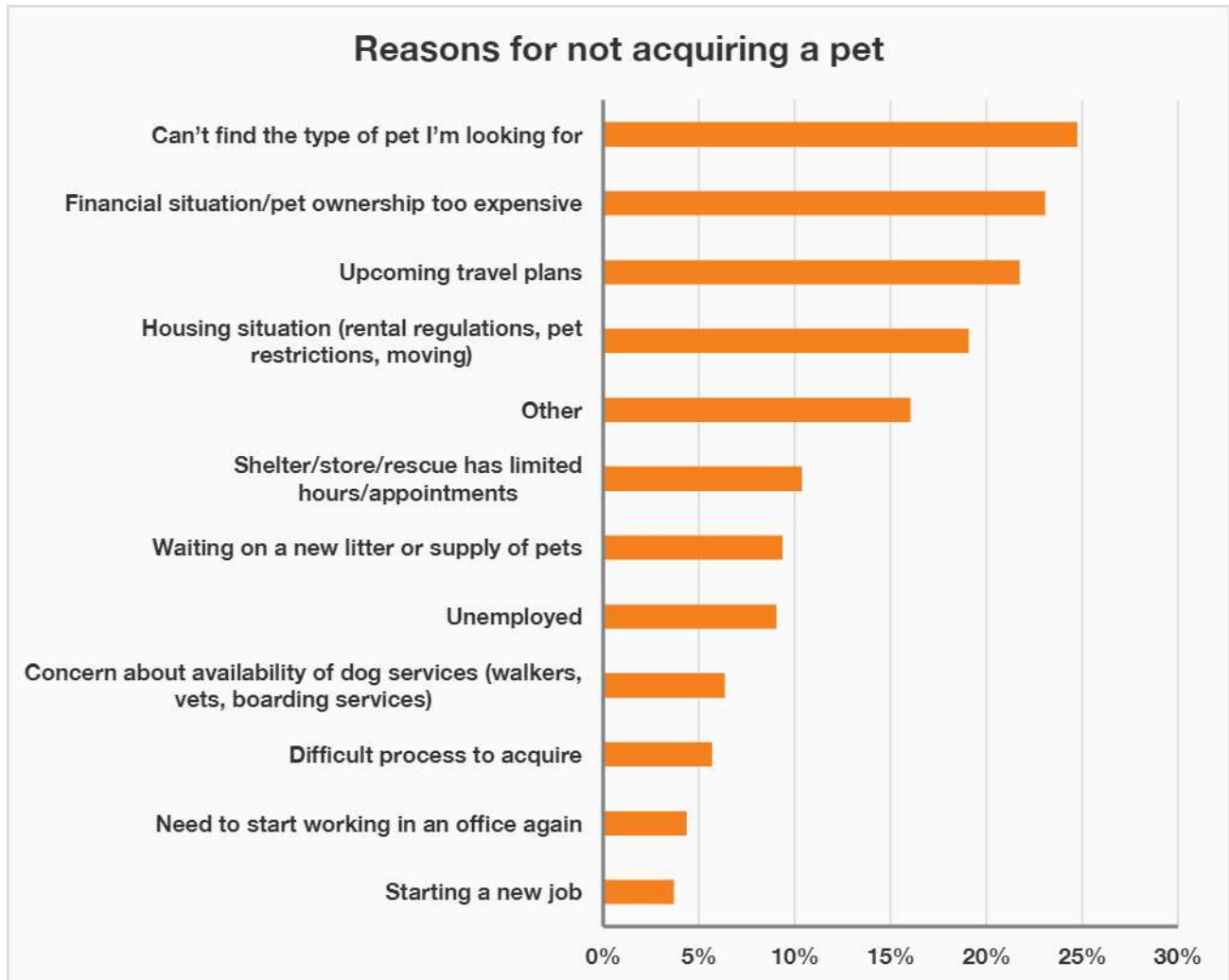
Delay reasons by region. The main reasons for delay in acquiring a dog for all regions were either waiting for a new litter or not being able to find the right type of dog. The latter was not as much of a concern in the Great Plains, the Mid-Atlantic, South Central and the Southeast regions.

Waiting for a new litter or supply was not at all concerning in the Mountain West region. Survey respondents were more concerned with limited hours, in addition to not being able to find the right dog. Financial situation was one of the top reasons in the South Central region, but was not concerning in the Mid-Atlantic and Great Plains regions.

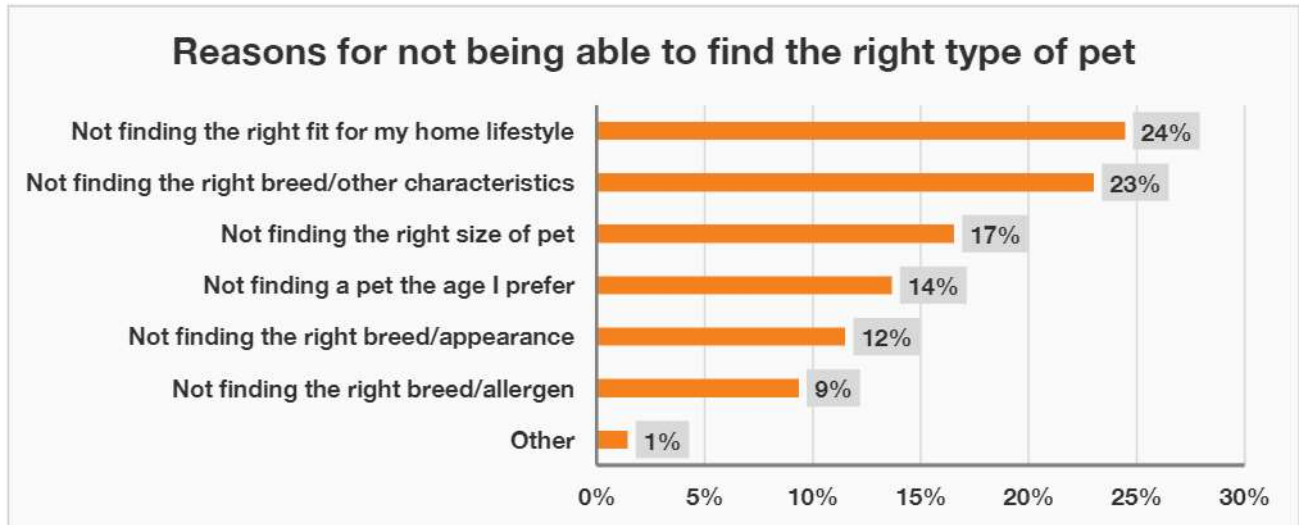
| Region | Main Reason | Secondary Reason | Not Concerning | Also Not Concerning |
|---------------|--|---|---|---|
| Great Plains | Waiting on a new litter or supply of pets | Concern about availability of dog services (walkers, vets, boarding services) | Limited hours/appts | Financial situation/pet ownership/expensive |
| Mid-Atlantic | Waiting on a new litter or supply of pets | Concern about availability of dog services (walkers, vets, boarding services) | Financial situation/pet ownership/expensive | Unemployed |
| Midwest | Can't find the type of pet I'm looking for | Waiting on a new litter or supply of pets | Unemployed | Starting a new job |
| Mountain West | Can't find the type of pet I'm looking for | Limited hours/appts | Unemployed | Waiting on a new litter or supply of pets |
| Northeast | Can't find the type of pet I'm looking for | Waiting on a new litter or supply of pets | Upcoming travel plans | Limited hours/appts |
| Pacific | Can't find the type of pet I'm looking for | Concern about availability of dog services (walkers, vets, boarding services) | Starting a new job | Unemployed |
| South Central | Waiting on a new litter or supply of pets | Financial situation/pet ownership/expensive | Starting a new job | Unemployed |
| Southeast | Waiting on a new litter or supply of pets | Can't find the type of pet I'm looking for | Difficult process to acquire | Unemployed |

Reasons for not yet acquiring a pet. The reasons for not acquiring a pet, ranked in order of frequency, are in the graph below. Respondents could select more than one reason.

A quarter (25%) of the respondents indicated that they couldn't find the type of pet they were looking for; 23% did not acquire a pet because of their financial situation and the expense of pet ownership. For the most part, respondents did not indicate starting a new job or going back to work in an office as reasons for not acquiring a pet.

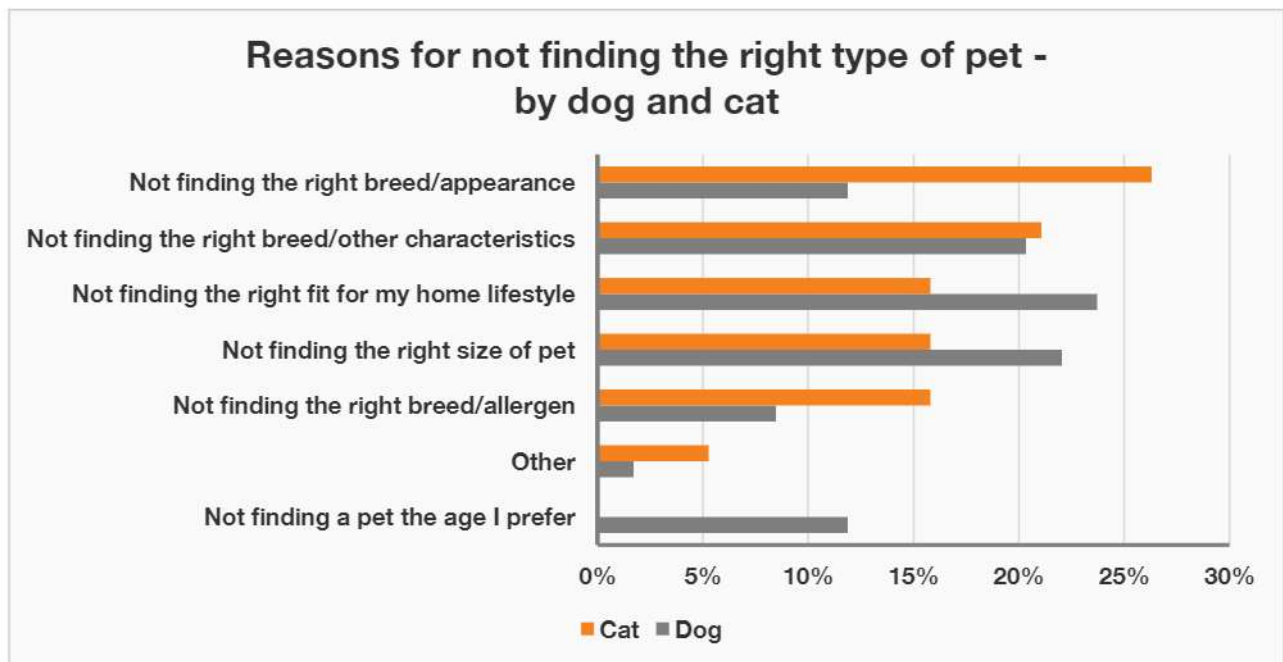


For those who couldn't find the type of pet they were looking for, the most common reasons were (1) not being able to find the right fit for their home lifestyle, (2) not being able to find the right breed or other characteristics, and (3) not being able to find the right size of pet.



The differences varied somewhat by whether they were considering acquiring a dog vs. a cat:

- Not being able to find the right breed or appearance was more often a reason for cats.
- Allergens as a factor were more driven by cats than dogs.
- Lifestyle and size of pet were more concerning for those considering acquiring a dog.
- Age was only a factor for those considering acquiring a dog.



The reasons also varied by age group. The biggest concerns for those 35 and older were not finding the right breed or other characteristics and not finding the right fit for home lifestyle. Not being able to find the right breed was a concern for those 18-34 and 55+ but not concerning for those between 35 and 54.

Appendix A: Summary of Survey Questions

Demographics:

- State
- Zip
- Age or age range
- Gender

Acquisition:

- Did you *consider acquiring* a dog or cat at any time in the past year?
- Did you *acquire* a pet at any time in the past year?

Species:

- What species did you adopt?
- Which species were you considering?

How acquired:

- How did you acquire your newest pet? (Individual, animal welfare, store, stray)
- Was the individual a breeder, friend or family, connection through friend or family, online connection?
- Was the animal welfare organization an animal shelter, foster, don't know?
- Was the pet you acquired at the store purchased, rehomed with previous owner, rehomed without previous owner?

Making the decision:

- How long did it take to make the decision?
- Reasons for delaying
- Reasons for not acquiring a pet
- Biggest challenge finding the type of pet you desire