



Overcoming Adoption
Barriers Research:
Executive Summary
October/November 2016

Best Friends[®]
SAVE THEM ALL



Background

In early 2016 a **Thought Leadership Team** was convened to recommend **where the animal welfare industry could make the greatest impact towards a no-kill nation.**

A social / behavior change route was explored, with the objective of making adoption a social norm – the only, or at least highly preferred, place for acquiring a pet. However, after reviewing a wide range of existing research available, we found that social change wouldn't provide the biggest impact. Most people are very favorable toward adoption, and even cite it as their preferred option. **The problem was that behavior wasn't following interest/intent.**

The **biggest issue was converting those people interested in adoption into actual adopters.** While there were several studies that touched on some of the high-level barriers, data wasn't available to really understand them, their scale, or how to overcome them.

As a result, we set out to do a **two-part research study to understand the pet acquisition process, existing barriers (real or perceived) to adoption, and assess potential solutions to overcome those barriers.** A qualitative study was conducted in July 2016 to inform a follow-up quantitative study conducted in October 2016. The following presentation contains the results of the research initiatives.



Current State of Pet Adoption

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.

Our opportunity is to help those interested in adoption navigate the process and actually to adopt a new pet!

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



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 study.

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

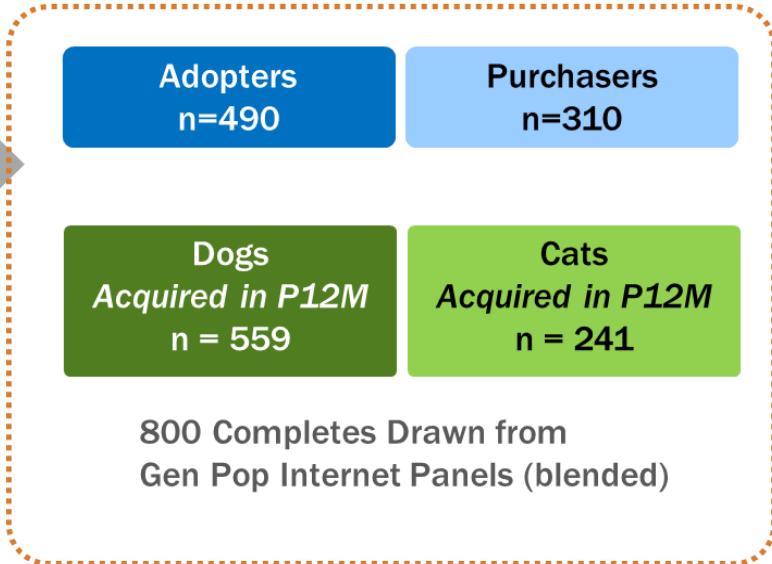
Assess Potential Opportunities to Remove Barriers

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



Methodology & Audience

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).



- 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



Highlights At A Glance

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.



Make Adoption Easy & Remove Uncertainty

Acquisition Option Experiences

Start to experience problems here with adoption – paperwork, rejections, intrusive, overcrowded, uncertainty around pet background & health



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

Dogs

Do more research Online (77%)

Use:

- 47% Pet finder sites
- 46% Breed specific sites
- 46% Online articles
- 21% Breeders

Most useful sources:

- 81% Spouse / Sig. other
- 70% Breed-specific sites
- 62% Online articles

Cats

Do more research In-person (78%)

Use:

- 58% Rescues
- 33% Pet stores

Most useful sources:

- 76% Shelters
- 72% Rescues
- 61% Pet stores associates

Resources **referenced**...

Adopters

74% Online:

- 42% Pet finder sites
- 32% Breed-specific sites
- 29% Social Media
- 27% Craigslist

81% In person:

- 59% Rescues
- 45% Shelters
- 26% Pet stores
- 16% Public events

56% Reading:

- 36% Online articles
- 32% Online reviews

Purchasers

75% Online:

- 48% Breed-specific sites
- 45% Pet finder sites
- 27% Social Media
- 23% Craigslist

61% In person:

- 34% Rescues
- 28% Breeder
- 24% Shelter
- 24% Pet stores

65% Reading:

- 48% Online articles
- 39% Online reviews

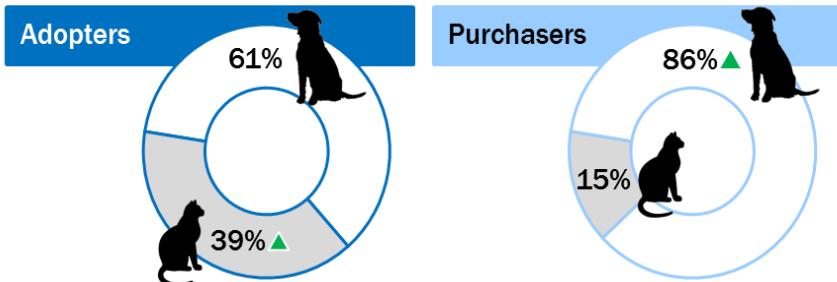
Only 5% of Adopters and Purchasers experienced problems while researching their decision.



Snapshot of Adopters vs. Purchasers

(Based on respondents for this study. Not intended to be an adopter / purchaser profile.)

Dogs vs. Cats



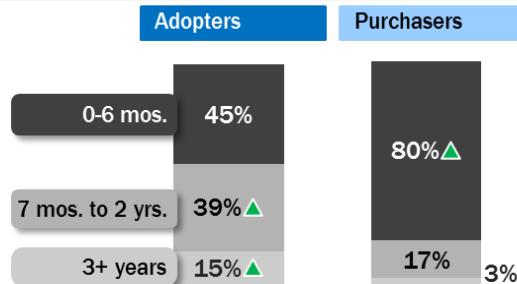
- Dogs more likely to be purchased
- Purchasers spend more time researching
- Purchasers expect to spend more on their pet
- Purchasers are looking for younger pets
- Purchasers are more likely to get a purebred pet
- Adopted pets are more likely to be spay/neutered
- Adopters are more likely to use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

Days Spent Researching

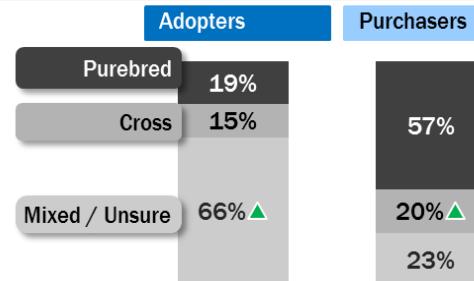


Adopters	Purchasers
16	22▲

Pet Age at Acquisition



Purebred vs. Mixed



Spend on Pet

Most planning to spend



Actual Spend



-\$102

-\$46

Spayed / Neutered Beforehand



Adopters	Purchasers
71%▲	20%

Likelihood to use place again

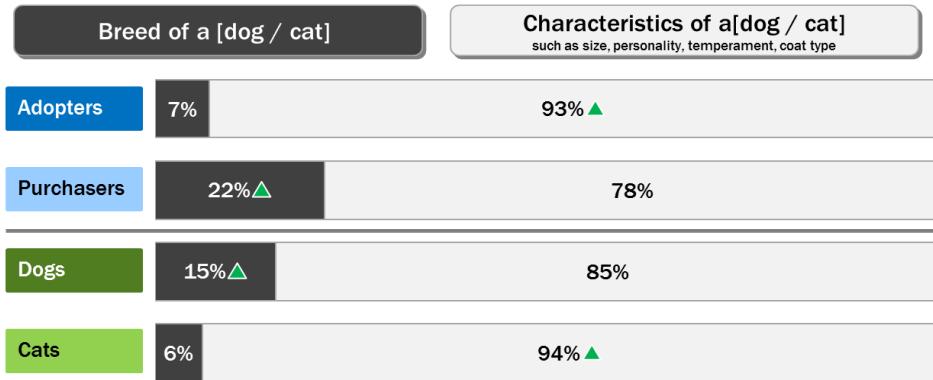


Adopters	Purchasers
89%▲	65%

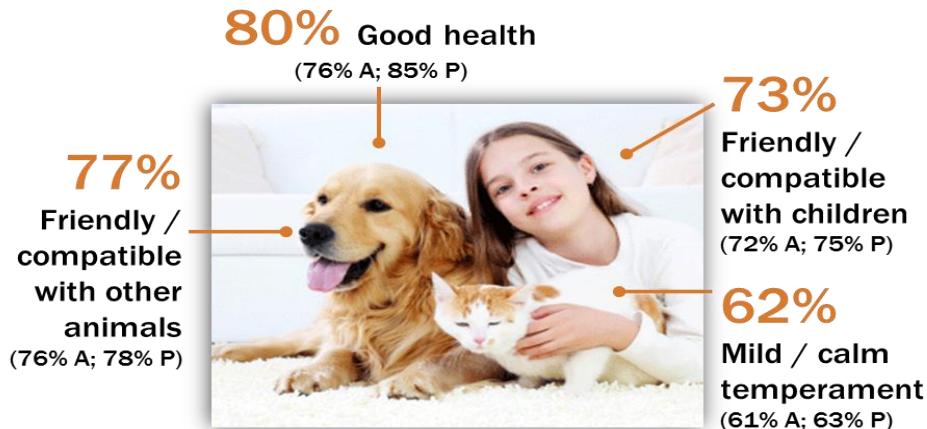


Pet Considerations

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:



Traits that are more important to...

Adopters

- 43% Housebroken
- 41% Spayed / neutered

Dogs

- 81% Compatible with other animals
- 64% Mild / calm temperament
- 32% Hypoallergenic / minimal shedding
- 31% Breed
- 28% Small

Purchasers

- 53% Puppy / kitten
- 50% Specific breed
- 37% Purebred
- 31% Small cat / dog
- 30% Not rescued from an abusive environment

Cats

- 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:

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

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



Negative Impressions:

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

Pet stores have negative impressions among all pet owners

Breeders are negatively viewed by Adopters and Cat owners

% = 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

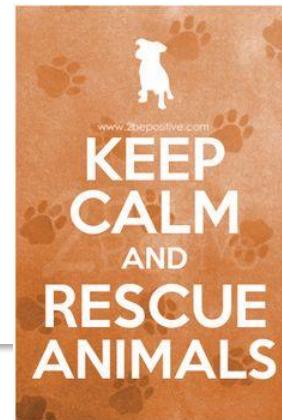
Motivated to rescue an animal.



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





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 were 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 as 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



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

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

Purchasers describe their Purchase place as:



- ✓ Experienced
- ✓ Helpful
- ✓ Knowledgeable



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

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

"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



Barriers to Adopting from those who Purchased

- 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*



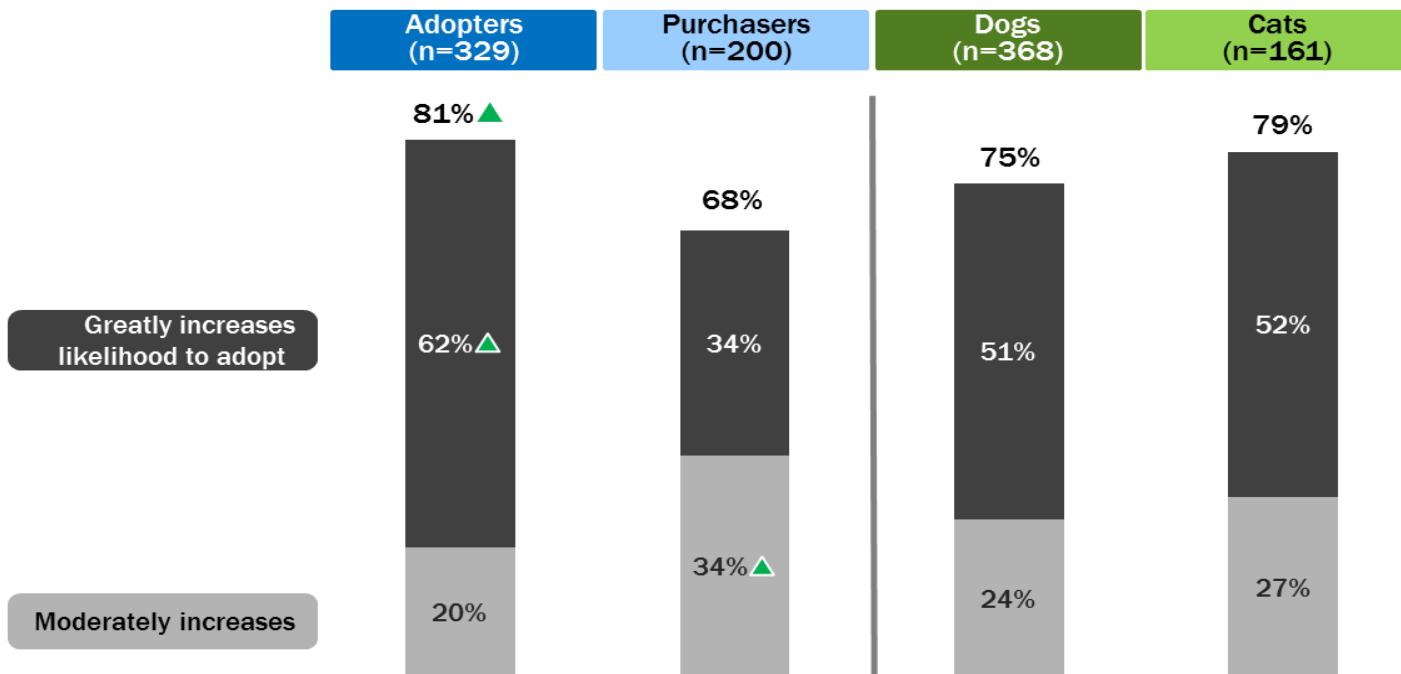
Adoption agency wouldn't let me have a dog based on where I live as I do not have a yard. However I go home everyday at lunch to let him out and take him for walk. Then I live right across the street from the dog beach and we run 2 miles a day. He also gets to come to work with me on Fridays." *Female, 30, Dog, Individual advertising a pet for sale*



Shelter Death Awareness

Two-thirds of pet owners say the kill rate is higher than they thought it was. Among both adopters and purchasers, learning the actual kill rate increases their likelihood to adopt from a rescue or shelter in the future.

Effect of Kill Rate Fact on Decision to Adopt from Rescue or Shelter
Among Those Who Feel the Number Euthanized Higher than Expected



*“It’s estimated that **every day** in the United States **9,000** dogs and cats are killed in shelters simply because they don’t have a safe place to call home.”*



Highest Rated Potential Improvements

A variety of potential solutions to overcome adoption barriers were presented to survey participants. The potential solutions were developed based on previous qualitative research, input from BFAS staff, and solutions currently being considered.

The strongest enhancements work to improve all phases of the pet acquisition process, from research, to making the decision, and ultimately acquiring and taking your new pet home

Top ranked features: Note: top features were consistent across generations!



Ability to spend time with animal in a private area at the facility



Standardized behavioral / medical checklist with key information



Ability to take pet home the same day

Purchasers and Cat owners express the most interest in being able to take a new pet home the same day



Ability to search database of pets for adoption with all of their information

A searchable database of available pets with all of their information is strongest for Dog owners



Access to a veterinarian to discuss animal's health



Trial adoption period with animal before committing to adoption

The only negatives associated with these top ranked features relate to execution:

- Checklist and database information must be accurate and up-to-date
- Application approval must happen quickly and efficiently if a pet can realistically be taken home the same day



Online Search Features Preferred

Since most research for a new pet begins online, it is critical to include specific search criteria



While not searchable, databases must include photos and health / behavior checklists

Nice to have information includes:

- Prior environment: abusive / not abusive
- Housebroken: Yes / No
- Gender: Male / Female
- Coat type

Importance of Pet Database Search Features

Top 2 Box – Critical / Important

Most Important

	Adopters	Purchasers	Dogs	Cats
Friendly / Compatible with other animals	81%	85%	83%	80%
Friendly / Compatible with children	77%	80%	80%▲	74%
Medical records / Confirmation of care from a vet	69%	79%▲	74%	72%
Health Status: Only search animals that are in good health	69%	78%▲	72%	73%
Temperament: Only energetic or have a calm / mild temperament	67%	73%▲	71%	65%
Age: Search pets within a specified age range	58%	68%▲	64%▲	57%
By Size	54%	67%▲	66%▲	43%
Distance: Search pets within a specified radius from my home	57%	60%	57%	61%
Where the pet is currently located (shelter, rescue, foster home, etc.)	58%	58%	58%	58%
AVERAGE	50%	56%	53%	50%
From abusive environment or NOT from an abusive environment	48%	54%	49%	53%
Housebroken: Only search animals that are housebroken	51%	46%	43%	65%▲
Gender: Choose to search just among male or female pets	45%	54%▲	48%	50%
Coat type	43%	49%	46%	42%
By Breed: Only search preferred breeds	30%	54%▲	45%▲	24%
Time in rescue / shelter	39%	37%	37%	41%
Hypoallergenic / Minimal shedding	35%	41%	40%▲	32%
Purebreds: Only search for purebreds	17%	39%▲	30%▲	15%
Mixed breeds: Only search for mixed breeds	23%	28%	27%▲	19%
Transportation options: To deliver my pet to my home	24%	25%	24%	24%

▲ Significantly higher than other group
 % = Indexes higher than Average
 % = Indexes lower than Average

Note: top features were consistent across generations!



Average Rated Potential Improvements

A few features may help facilitate the process of finding the right pet, but will not be largely influential in changing actual behavior

Average ranked features:

Person / Service to match
pets that fit your
needs / lifestyle /
preferences



Adoption event / fair in a
large park featuring
pets available for
adoption



Online tools to match pets
that fit your needs /
lifestyle /
preferences



The response to these features is mixed:

Pros: Helpful and informative



Pros: Sounds like a fun,
accessible way to
interact with pets



Pros: Helpful for researching /
narrowing down options



Cons: It's a personal process
that can't be outsourced
to someone else



Cons: Not a normal or ideal
setting to gauge a pet's
natural behavior



Cons: May be too limiting and
impersonal





Below Average Potential Improvements

There are several features ranked below average. These features will have limited impact on influencing pet owners to adopt from Rescues in the future

Below average features:

- | | | | |
|---|---|--|--|
|  | Ability to complete paperwork online before arriving at facility |  | No real negatives, just not important enough to change behavior |
|  | Access to an animal trainer through an animal rescue |  | Cost implications and narrow appeal (1st time pet owners / pets with no prior training) |
|  | Online source that can find specific breeds available for adoption |  | The accuracy and reliability are not trusted enough to be valuable |
|  | 1 month of complimentary pet insurance |  | Not long enough to be of any real value |
|  | Transportation service that will bring any pet to you from anywhere in the U.S. |  | Does not allow for in-person time with the animal. cost. what happens if it doesn't work out, how accurate is the Info ? |
|  | Concierge service pre-selects 4 pets to choose from based on top criteria |  | Too limiting, choosing a pet is not something anybody else can do for you |

These features fall to the bottom of the ranking for specific reasons:



Potential Improvements Recap

▲ Significantly higher than other group

Strongest Driver
Above Average Driver
Average Driver
Below Average Driver
Weakest Driver

Key Drivers in Adoption Consideration: Index Scores

The top 6 opportunities all address making adoption easier and removing uncertainty:

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

Note: Top & bottom rated features were consistent across generations!



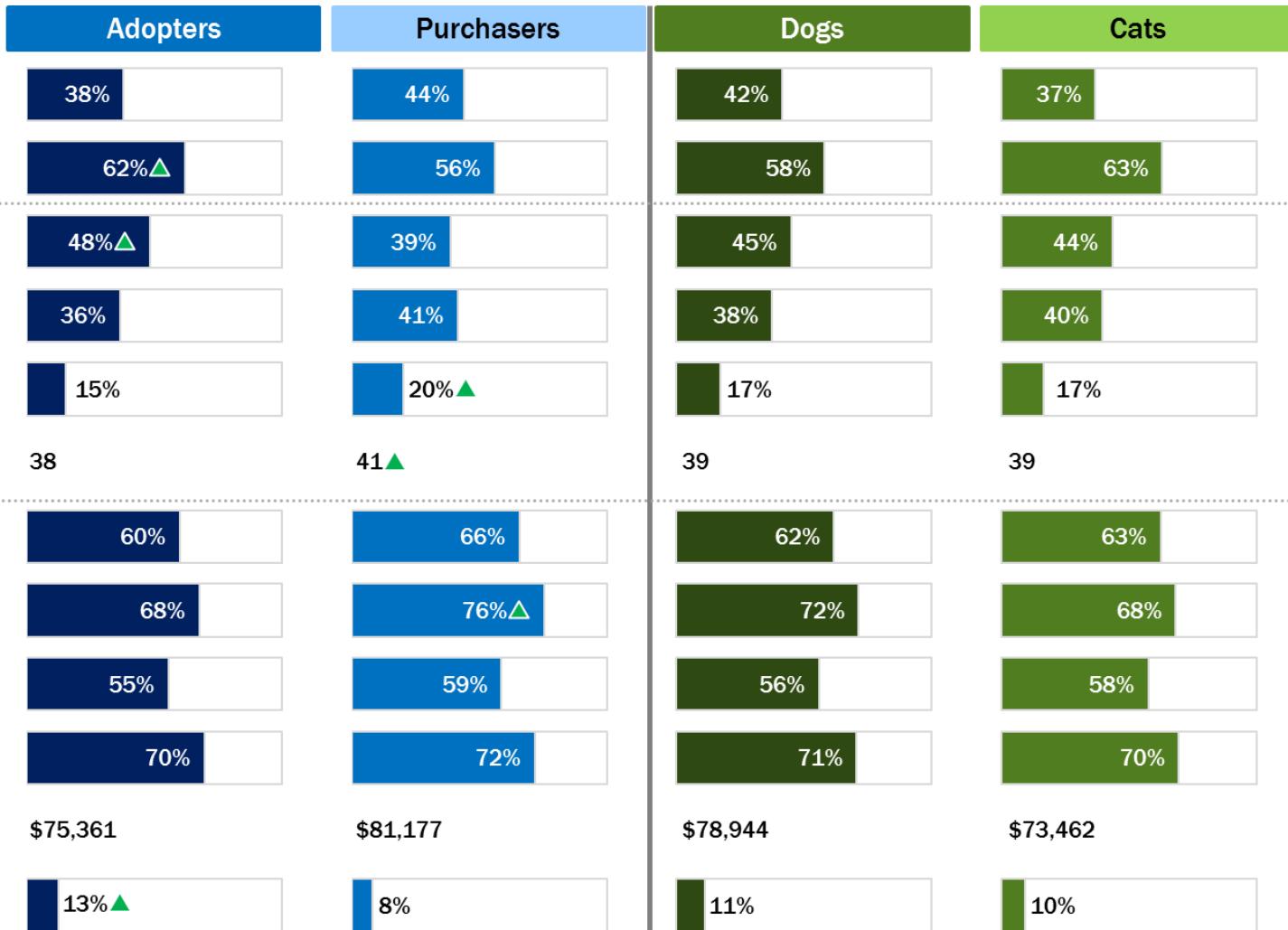
Attachments





Respondent Profile

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



▲ 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:



- 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



- Skew: young (median = 39), female, married, children at home, and employed
- Live in suburban areas, in single-family homes, and homes that they own

Adopters

- More female, young, single
- Non-white / Hispanic
- More likely to rent their homes than Purchasers
- Live primarily in suburban areas

Purchasers

- Slightly older
- Have kids at home
- Skew more towards rural areas
- Own their homes
- Tend to be more religious / more Republican

Dogs

- More single-family home dwellers

Cats

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

Note of caution: The objective of the study was not to obtain a profile of adopters vs. purchasers.



Generation Snapshot

(Note: Based only on those in our study...acquired pet in past 12 months and considered multiple sources)

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

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

Millennials are more likely to consider all options (except animal control / shelter / pound) than any other generations.

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



Max/Diff Process for Opportunity Analysis

Max Diff was used to measure preference for different feature options

Here is the first set of features.

Please review them carefully and answer the two questions below.

Which one of these features would make you **most likely** to adopt your next pet from a **rescue**?

And, which one of these features would make you **least likely** to adopt your next pet from a **rescue**?

Drag and drop each feature into the corresponding bucket below

Transportation service that will bring any pet to you from anywhere in the U.S.	1 month of complimentary pet insurance	Standardized behavioral / medical checklist with key information (e.g., age, vaccinations, medications, spay / neuter status, behavioral assessment)	Person / Service to match you with pets that fit your needs / lifestyle / preferences
---	--	--	---

Most likely

Least likely

  55% Complete

HOW IT WORKS:

Respondents were shown various subsets containing 4 digital features at a time and asked to indicate which feature in the set would make them most likely to adopt their next pet from a rescue



Max/Diff Process for Opportunity Analysis

Once data are collected, regression analysis is used to produce a “share of preference” for each feature.

The sum of all feature shares = 100%

The more likely the feature is to make you adopt from a rescue, the higher the share.

The less likely the feature is to make you adopt from a rescue, the lower the share.

If testing 41 features and all are equally likely, each feature’s share would be 2.44%

Each share is then indexed to the average share to identify stronger and weaker features.

	Feature Index	Share of Preference
Feature #1	166	18.45
Feature #2	131	14.53
Feature #3	124	13.83
Feature #4	102	11.31
Feature #5	89	9.92
Feature #6	88	9.76
Feature #7	85	9.39
Feature #8	67	7.44
Feature #9	48	5.36





Opportunity Assessments

Opportunity	Score	Pros	Cons
Ability to spend time with animal in a private area at the facility		A critical step in getting to know a pet, determining if it will fit into one's household, and starting to bond	The only negatives are with people who think it may not be enough time to fully see a pet's personality
Standardized behavioral / medical checklist with key information		Necessary information for people deciding if a pet is right for them and if they are capable of meeting its needs	Doubts exist about the accuracy of the information provided, whether or not it is verifiable, and the credentials of the person / people conducting the assessments
Ability to take pet home the same day		Once someone finds the pet they want, they don't want to wait, this also eliminates the concern of someone else choosing "their" pet or someone else being chosen for "their" pet over them	High potential for rash decisions, might increase the number of "returns", and since the adoption process can be lengthy and involves much paperwork, will it require the whole day?
Database of available pets with all their information		Saves time and effort when able to see what animals are available prior to making an in-person visit	Those with experience on Petfinder and other sites have learned that the information is often not up-to-date, accurate, and can be misleading and/or overwhelming
Access to a veterinarian to discuss animal's health		Provides peace of mind over an animal's health, and if not healthy, allows a potential owner to make a decision about whether its needs are too much to handle, or not	Cost and staffing / availability

 Above Average Appeal

 Average Appeal

 Below Average Appeal



Opportunity Assessments, cont.

Opportunity	Score	Pros	Cons
Trial adoption period with animal before committing to adoption		This feature offers a nice “back-up” for those considering a pet but may have some reservations, it offers reassurance they will end up with a compatible pet that gets along with all members of the household	The only negatives are feelings for the pet and any children who may grow attached during the trial period
Person / Service to match pets to needs / lifestyle / preferences		Appealing for the personalized service and help / information it offers	There is a desire for more information about the process – who is doing the matching, there is still a need for in-person interaction, and are they just trying to get rid of the most urgent cases?
Adoption event in a large park with pets available for adoption		Seems like a fun, accessible way to interact with a large number / variety of pets	The strange, unfamiliar environment may not be the best to gauge a pets’ normal behavior
Online tools to match pets with needs / lifestyle / preferences		A benefit for anyone looking for help in researching, narrowing down, and finding the right pet	May be too limiting and impersonal, concerns exist over how accurate and up-to-date the online information is
Ability to complete paperwork online before arriving at facility		This feature is considered a time saver and more convenient option to those who want to speed up the process of acquiring a new pet and knowing whether or not they will be approved	Those with concerns about this feature prefer an in-person approach and worry about online security



Opportunity Assessments, cont.

Opportunity	Score	Pros	Cons
Access to an animal trainer through an animal rescue		Most helpful for animals in shelters / rescues who have had no prior training and for owners who are adopting / purchasing a pet for the first time	Cost, availability, and trainer qualifications are questions that pet owners have about this service
Online source that can find specific breeds available for adoption	 *	Opens doors and possibilities for finding pets that otherwise could be missed	The accuracy of the information is a main concern (who is verifying the breeds, how up-to-date is the database, and is it reliable information)
1 month of complimentary pet insurance		A big benefit for those who have experienced high vet bills shortly after adoption in the past and for those worried about the unknown risks of acquiring a new pet	1-month is not considered a long enough time period to be of real value, what does the insurance specifically cover, and not of significant value to those who plan to buy insurance anyway
Transportation services from anywhere in the U.S.		Appeals to those in areas lacking a large selection and is recognized for the upside it holds for the animals	Concerns seem to outweigh the pros and include – no time to spend with the animal before transport, what happens if the match doesn't work, and how can you be guaranteed it is the right animal that was requested
Concierge pre-selects 4 pets to choose from based on top criteria		Makes the process of choosing a pet less overwhelming and easier	Limits the animals a person can see, increases the chance of “missing out on the perfect pet”

*  Higher among purchasers.



Generational View: Opportunities

	TOTAL	Millennials (18 to 34)	Gen X (35 to 51)	Boomers (52 to 70)	Ranking		
					Millennials (18 to 34)	Gen X (35 to 51)	Boomers (52 to 70)
Ability to spend time w ith animal in a private area at the facility	188	190	180	200	1	2	2
Standardized behavioral / medical checklist w ith key information (e.g., age, vaccinations, medications, spay / neuter status, behavioral assessment)	186	184	181	203	2	1	1
Ability to take pet home the same day	146	143	153	139	3	3	4
Ability to search a comprehensive database of available pets for adoption w ith all of their information	135	128	135	151	5	4	3
Access to a veterinarian to discuss animal's health	130	132	130	128	4	5	6
Trial adoption period w ith animal before committing to adoption	119	113	119	132	6	6	5
Person / Service to match you w ith pets that fit your needs / lifestyle / preferences	84	86	86	76	7	7	9
Adoption event / fair in a large park featuring pets that are available for adoption	80	82	74	87	8	10	7
Online tools to match you w ith pets that fit your needs / lifestyle / preferences	79	77	81	80	9	8	8
Ability to complete paperw ork online before arriving at facility	71	69	75	68	11	9	11
Access to an animal trainer through an animal rescue	71	76	72	55	10	11	12
Online source that can find specific breeds available for adoption	67	62	70	74	13	12	10
1 month of complimentary pet insurance	56	65	54	40	12	13	14
Transportation service that will bring any pet to you from anyw here in the U.S.	52	55	52	41	14	14	13
Concierge service that pre-selects 4 pets for you to choose from based on your top criteria	36	38	39	25	15	15	15



Generational View: Search Features

	TOTAL	Millennials (18 to 34)	Gen X (35 to 51)	Boomers (52 to 70)	Ranking		
					Millennials (18 to 34)	Gen X (35 to 51)	Boomers (52 to 70)
Friendly/ Compatible with other animals	82.2	81.5	82.7	83.0	1	1	1
Friendly/ Compatible with children	78.2	76.3	82.5	74.0	2	2	5
Medical records / Confirmation of care from a vet	73.0	69.6	73.5	80.7	4	3	2
Health Status: Only search animals that are in good health	72.1	70.2	72.5	76.1	3	4	3
Temperament: Only search animals that are energetic or have a calm / mild temperament	68.9	65.9	69.9	74.5	5	5	4
Age: Search pets within a specified age range	62.1	60.5	60.4	70.3	7	7	6
By Size	59.3	52.7	62.5	69.3	9	6	7
Distance: Search pets within a specified radius from my home	58.2	60.7	54.5	60.1	6	9	9
Where the pet is currently located (shelter, rescue, foster home, etc.)	58.0	54.8	60.3	61.5	8	8	8
Prior environment: Search animals rescued from an abusive environment or only search animals NOT rescued from an abusive environment	50.1	48.3	50.5	54.2	12	10	12
Housebroken: Only search animals that are housebroken	49.1	50.4	50.1	43.5	10	11	14
Gender: Choose to search just among male or female pets	48.7	49.2	44.6	56.3	11	12	10
Coat type (long, short, etc.)	44.9	41.1	44.1	56.2	13	13	11
By Breed: Only search preferred breeds	39.1	36.6	38.6	46.7	16	15	13
Time in rescue / shelter	38.2	36.8	39.8	38.5	15	14	15
Hypoallergenic / Minimal shedding	37.5	37.7	38.2	35.1	14	16	16
Purebreds: Only search for purebreds	25.2	24.0	24.7	29.7	18	17	17
Mixed breeds: Only search for mixed breeds	24.6	23.1	24.0	29.6	19	18	18
Transportation options: To deliver my pet to my home	24.4	28.0	23.0	17.8	17	19	19
AVERAGE	52.3	50.9	52.5	55.6			

