

**September 2013
Adopter Survey:
Veterinary Services
Aggregate Results**



Pethealth conducted a comprehensive adopter survey in September 2013 designed as a follow-up to a similar survey conducted in September of 2012, and to provide greater insight to four key objectives;

1. to determine the differences, if any, in the purchasing habits of respondents who adopted their new pet in a shelter's own facility versus a satellite location inside a PetSmart® or Petco® store;
2. to determine what influences a pet adopter's selection of veterinary care for their new pet;
3. to determine the strength of retailer-clinic relationships such as PetSmart® and Banfield® vs. stand alone operations such as Veterinary Centers of America® (VCA);
4. to determine the degree to which veterinary clinics influence pet owner decisions for the post-adoption purchase of wellness and other related pet care products and services.

Readers are encouraged to visit www.petpoint.com to compare the results of this survey with that of last September's survey.

The survey distribution was compiled using new pet adopter data collected through AWOs using our own industry leading PetPoint application for the period August 2012 to August 2013, and meeting the defined adoption criteria.

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

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

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 2,000 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.

The resultant dataset was then segmented based on two variables, AWO adoption partners and the location of adoptions, 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 over 344,000 unique adopters. Invitations were incentivized with an offer of \$20 toward the purchase of pet food or pet supplies from online pet specialty and retail site, ThePetangoStore.com.

Invitations and subsequent reminders were distributed to each of the 7 survey collector groups and included a URL unique to each group. The survey of 53 total questions was conducted online and developed with “skip logic” to ensure respondents were only presented questions based on their previous responses.

The initial open rate for the survey was 14%. Greater than 329,000 survey invitation and reminder emails were successfully delivered, and over 8,200 respondents who opened an invitation or reminder email completed the survey.

- Over 50% of respondents indicated they adopted from a Humane Society or SPCA; 27% of respondents indicated they adopted from a rescue; over 9% indicated adopting from an Animal Control Organization; nearly 9% adopted from a PetSmart; and over 4% adopted from a Petco.
- There was an increase in the adoption of animals under 1 year of age, from 35.5% last year to nearly 52% this year.
- Over 50% of respondents indicated their adoption fee to be under \$100.
- Over 79% of respondents did not receive any pet medications at the point of adoption.
- Greater than 71% of respondents indicated that their adoption counsellor recommended an immediate health or wellness check-up for the newly adopted pet; however, over 56% of respondents indicated that no clinic was referred to them by the same adoption counsellor, compared to the 62% of respondents who indicated likewise in last year's survey.
- Over 50% of respondents indicated they remained in contact with their adopting shelter, with 83% indicating they would be inclined to purchase products or services offered by their shelter, with this figure increasing to over 92% if respondents learned a portion of their purchase would help support their adopting shelter.
- 62% of adopters reported taking their newly adopted pet to a veterinary clinic within the first 7 days after adoption, with over 22% indicating that they had visited a veterinary clinic within the first 3 days.

- Over 9% of respondents chose either a VCA Animal Hospital or a Banfield Pet Hospital for their pet's first clinic visit, down from the over 15% of respondents who indicated they chose either a VCA Animal Hospital or Banfield Pet Hospital last year.
- 4% of respondents took their pet to a clinic owned or operated by the animal welfare organization from which they adopted their pet, down from approximately 6% last year.
- Over 78% 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.
- This year 51% of respondents chose their animal clinic on the basis of a previous relationship with a veterinary clinic, compared to 54.5% who answered likewise last year.
- Over 55% of respondents indicated that their veterinary clinic offered or recommended a wellness plan/program, and over 31% indicated that their veterinarian provided information on pet insurance, and nearly 13% of respondents subsequently purchased pet insurance.
- Respondents were asked to rate their veterinary clinic experience and over 91% rated their experience as Very Positive or Positive; over 7% rated their experience Neutral; and only 1.5% rated their experience as Poor or Very Poor.
- Over 85% of adopters indicated that the cost of their first visit to their veterinary clinic was under \$200.
- 38% of respondents indicated making 2 or more visits to a clinic with their adopted pet in the last 12 months.

- Nearly 46% of respondents indicated that they had spent in excess of \$200 in veterinary care for their adopted pet in the last 12 months, down from last year's survey when 63% of respondents answered the same.
- Fewer than 66% of adopters indicated that they purchased preventative treatment such as flea and tick medication for their pet in the last 12 months, compared to approximately 74 last year, and over 52% indicated that they had required prescription medication, while last year that figure was over 56%.
- Greater than 80% of respondents indicated that they purchased their pet medications through their veterinary clinic vs. nearly 78% last year; over 7% had purchased their pet medications online, and over 8% had purchased their pet medications through a retail location.
- Over 32% of respondents who indicated purchase of pet medications through a retailer indicated they purchased at a mass retailer, up from over 13% last year, while approximately 43% of respondents indicated they purchased from a pet specialty retailer vs. 73% last year.
- Conversely, approximately 72% of respondents indicated they purchased from a pet specialty retailers online site vs. 54% last year.
- Over 50% of respondents indicated they remained in contact with their adopting shelter, with 83% indicating they would be inclined to purchase products or services offered by their shelter, with this figure increasing to over 92% if respondents learned a portion of their purchase would help support their adopting shelter.

Aggregate Results

Top 5 Responses only, in rank order	Response Results										
Please tell us where you adopted your pet from;	<table border="0"> <tr> <td data-bbox="839 272 1130 305">Humane Society/SPCA</td> <td data-bbox="1243 272 1315 305">50.6%</td> </tr> <tr> <td data-bbox="951 305 1130 338">Rescue Group</td> <td data-bbox="1243 305 1315 338">27.0%</td> </tr> <tr> <td data-bbox="786 338 1130 370">Animal Control Organization</td> <td data-bbox="1243 338 1315 370">9.3%</td> </tr> <tr> <td data-bbox="936 370 1130 403">PetSmart Store</td> <td data-bbox="1243 370 1315 403">8.8%</td> </tr> <tr> <td data-bbox="953 403 1130 436">PETCO Store</td> <td data-bbox="1243 403 1315 436">4.4%</td> </tr> </table>	Humane Society/SPCA	50.6%	Rescue Group	27.0%	Animal Control Organization	9.3%	PetSmart Store	8.8%	PETCO Store	4.4%
Humane Society/SPCA	50.6%										
Rescue Group	27.0%										
Animal Control Organization	9.3%										
PetSmart Store	8.8%										
PETCO Store	4.4%										
Do you remember the name of your adopting shelter/rescue?	<table border="0"> <tr> <td data-bbox="1079 529 1130 562">Yes</td> <td data-bbox="1243 529 1315 562">92.9%</td> </tr> <tr> <td data-bbox="1079 562 1130 595">No</td> <td data-bbox="1243 562 1315 595">7.1%</td> </tr> </table>	Yes	92.9%	No	7.1%						
Yes	92.9%										
No	7.1%										
Have you remained in contact with your adopting shelter/rescue?	<table border="0"> <tr> <td data-bbox="1079 680 1130 712">Yes</td> <td data-bbox="1243 680 1315 712">50.8%</td> </tr> <tr> <td data-bbox="1079 712 1130 745">No</td> <td data-bbox="1243 712 1315 745">49.2%</td> </tr> </table>	Yes	50.8%	No	49.2%						
Yes	50.8%										
No	49.2%										
How do you remain engaged?	<table border="0"> <tr> <td data-bbox="626 832 1130 865">Subscribe to/receive emails or newsletter</td> <td data-bbox="1243 832 1315 865">73.4%</td> </tr> <tr> <td data-bbox="662 865 1130 898">Make donations; supplies, money, etc.</td> <td data-bbox="1243 865 1315 898">41.0%</td> </tr> <tr> <td data-bbox="1008 898 1130 931">Volunteer</td> <td data-bbox="1243 898 1315 931">16.1%</td> </tr> </table>	Subscribe to/receive emails or newsletter	73.4%	Make donations; supplies, money, etc.	41.0%	Volunteer	16.1%				
Subscribe to/receive emails or newsletter	73.4%										
Make donations; supplies, money, etc.	41.0%										
Volunteer	16.1%										
Would you be inclined to purchase services or products offered or referred by your adopting shelter/rescue?	<table border="0"> <tr> <td data-bbox="1079 1051 1130 1083">Yes</td> <td data-bbox="1243 1051 1315 1083">83.0%</td> </tr> <tr> <td data-bbox="1079 1083 1130 1116">No</td> <td data-bbox="1243 1083 1315 1116">17.6%</td> </tr> </table>	Yes	83.0%	No	17.6%						
Yes	83.0%										
No	17.6%										
Would you be more inclined if you knew a percentage of your purchase was donated back to your adopting shelter/rescue?	<table border="0"> <tr> <td data-bbox="1079 1240 1130 1273">Yes</td> <td data-bbox="1243 1240 1315 1273">92.6%</td> </tr> <tr> <td data-bbox="1079 1273 1130 1306">No</td> <td data-bbox="1243 1273 1315 1306">7.8%</td> </tr> </table>	Yes	92.6%	No	7.8%						
Yes	92.6%										
No	7.8%										
Did you adopt a dog or cat?	<table border="0"> <tr> <td data-bbox="1072 1392 1130 1425">Dog</td> <td data-bbox="1243 1392 1315 1425">60.1%</td> </tr> <tr> <td data-bbox="1079 1425 1130 1458">Cat</td> <td data-bbox="1243 1425 1315 1458">39.9%</td> </tr> </table>	Dog	60.1%	Cat	39.9%						
Dog	60.1%										
Cat	39.9%										
Approximately how old was your [Q8] when adopted?	<table border="0"> <tr> <td data-bbox="962 1541 1130 1574">1 - 12 months</td> <td data-bbox="1243 1541 1315 1574">51.9%</td> </tr> <tr> <td data-bbox="998 1574 1130 1607">1 - 2 years</td> <td data-bbox="1243 1574 1315 1607">25.0%</td> </tr> <tr> <td data-bbox="998 1607 1130 1640">3 - 5 years</td> <td data-bbox="1243 1607 1315 1640">15.3%</td> </tr> <tr> <td data-bbox="998 1640 1130 1673">6 - 8 years</td> <td data-bbox="1243 1640 1315 1673">5.0%</td> </tr> <tr> <td data-bbox="905 1673 1130 1705">Older than 8 years</td> <td data-bbox="1243 1673 1315 1705">2.8%</td> </tr> </table>	1 - 12 months	51.9%	1 - 2 years	25.0%	3 - 5 years	15.3%	6 - 8 years	5.0%	Older than 8 years	2.8%
1 - 12 months	51.9%										
1 - 2 years	25.0%										
3 - 5 years	15.3%										
6 - 8 years	5.0%										
Older than 8 years	2.8%										

Aggregate Results

Please indicate your total adoption fees, excluding the purchase of any pet products at the time of adoption:		
	\$50-99	28.0%
	\$0-49	22.7%
	\$100-149	20.7%
	\$150-199	12.2%
	\$200-249	6.0%
Did you receive any medication for your {Q8} at the point of adoption?		
	No	79.3%
	Yes	20.7%
What type of medication(s) did your [Q8] receive (more than one answer may be selected)?		
	Full prescription, e.g. Heartworm, Pain relief	56.6%
	Preventative or treatment (full dose supply), e.g. Flea & Tick	37.9%
	Sample, i.e. a single or limited supply dose of preventative treatment from the manufacturer	24.3%
At the time of adoption, did your adoption counselor recommend an immediate health or wellness check-up for your newly adopted [Q8]?		
	Yes	71.3%
	No	28.7%
Were you offered any short term pet insurance at point of adoption, such as a gift of insurance or introductory coverage with a low first month premium?		
	Yes	76.5%
	No	23.5%
Was a veterinary clinic referred to you when you adopted your [Q8]?		
	No	56.4%
	Yes	43.6%
Have you sought veterinary care for your [Q8] since adopting?		
	Yes	82.8%
	No	17.2%
How long after you adopted did you take your [Q8] for its first veterinary clinic visit?		
	4 - 7 Days	39.4%
	2 - 4 Weeks	24.2%
	0 - 3 Days	22.6%
	1 - 3 Months	9.4%
	3 - 6 Months	2.7%

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Which veterinary clinic did you choose for your [Q8]?	Local animal hospital	58.4%
	Other (please specify)	28.3%
	Banfield Pet Hospital (Operating INSIDE of a PetSmart store)	5.3%
	Adjacent to or part of the shelter I adopted from	4.0%
	VCA Animal Hospital	3.4%
During your veterinary visit did you make a purchase of pet medication?	Yes	58.7%
	No	41.3%
Please tell us what you purchased (more than one answer may be selected)?	Prescription medication	66.4%
	Non-prescription preventatives/treatments	48.7%
What was the primary reason for your [Q8]'s visit to the veterinary clinic?	Post adoption check-up	43.2%
	Routine wellness	20.3%
	Vaccinations	15.1%
	Respiratory illness/infection	10.9%
	Heartworm testing or treatment	3.6%
How did you learn of your veterinary clinic?	I am a previous or existing client of the clinic	55.5%
	It was referred to me at adoption	18.4%
	Word of mouth	14.2%
	Internet search	6.9%
	The clinic is located where I purchase my pet food and pet supplies	3.0%
Which factor(s) most influenced your selection of a veterinary clinic (more than one answer may be selected)?	Previous or existing client of clinic	51.0%
	Location	45.5%
	Word of mouth	20.5%
	Specialization/expertise	14.2%
	Referral at point of adoption	12.8%
What was the cost of your veterinary care including the purchase of any medication?	\$0 - \$99	53.9%
	\$100 - \$199	31.8%
	\$200 - \$299	8.6%
	\$300 - \$399	2.9%
	More than \$500	2.0%

Aggregate Results

Do you feel you received good value for what you paid for your veterinary care?	Yes No	92.6% 7.4%
Did your veterinary clinic offer or recommend a wellness plan/program for your [Q8]?	Yes No	55.3% 44.7%
How would you rate your veterinary clinic experience overall?	Very Positive Positive Neutral Poor Very Poor	57.4% 33.7% 7.4% 1.1% 0.4%
How many times has your [Q8] required veterinary care since its first veterinary visit?	0 1 2 3 More than 4	38.6% 23.5% 17.8% 10.4% 6.0%
Did you take your [Q8] to the same veterinary clinic for subsequent care?	Yes No	87.6% 12.4%
Please tell us why you changed veterinary clinics (more than one answer may be selected)?	Quality of service Cost Required emergency care Moved Word of mouth/recommendation	30.8% 27.6% 21.1% 19.1% 18.5%
Have you purchased any pet medication since your [Q8]'s first veterinary appointment?	No Yes	50.2% 49.8%

Aggregate Results

<p>Please tell us what type of medication you purchased for your [Q8] (more than one answer may be selected)?</p> <p style="text-align: right;">Preventative or treatment, e.g. Flea & Tick Full prescription, e.g. Pain relief, Heartworm Other (please specify)</p>	<p style="text-align: right;">65.9% 52.3% 26.6%</p>
<p>Please tell us where you purchased your [Q8]'s medication from;</p> <p style="text-align: right;">Veterinary clinic Retailer Online Other (please specify)</p>	<p style="text-align: right;">80.3% 8.3% 7.4% 4.0%</p>
<p>Please tell us which retailer you purchased your pet medications from?</p> <p style="text-align: right;">PetSmart Other (please specify) Wal-Mart PETCO Costco</p>	<p style="text-align: right;">28.7% 24.8% 24.5% 12.6% 4.2%</p>
<p>Please tell us which online store you purchased your pet medications from?</p> <p style="text-align: right;">1800PetMeds.com Other (please specify) ThePetangoStore.com Drsfostersmith.com PetCareRx.com</p>	<p style="text-align: right;">39.9% 25.4% 10.5% 9.8% 6.5%</p>
<p>How much do you estimate you have spent in total, including the purchase of medication this past year in veterinary care for your [Q8]?</p> <p style="text-align: right;">\$0 - \$99 \$100 - \$199 \$200 - \$299 \$300 - \$399 \$400 - \$499</p>	<p style="text-align: right;">29.0% 25.3% 15.7% 11.7% 5.5%</p>
<p>Did the veterinarian provide any information on pet insurance for your pet?</p> <p style="text-align: right;">No Yes</p>	<p style="text-align: right;">68.9% 31.1%</p>

Aggregate Results

<p>What type of coverage was recommended?</p>	<p>Comprehensive including wellness 50.9%</p> <p>Comprehensive (Accident & Illness) 44.5%</p> <p>Accident only 4.6%</p>
<p>Did your veterinarian recommend one particular program over all others?</p>	<p>Don't remember 73.8%</p> <p>24PetWatch 13.1%</p> <p>VPI 3.0%</p> <p>Trupanion 2.8%</p> <p>Petplan 1.8%</p>
<p>Have you purchased pet insurance for your [Q8]?</p>	<p>No 87.2%</p> <p>Yes 12.8%</p>
<p>Which brand of pet insurance did you purchase?</p>	<p>24PetWatch 67.5%</p> <p>Petplan 7.0%</p> <p>ShelterCare 6.6%</p> <p>VPI 6.4%</p> <p>Healthy Paws 3.5%</p>
<p>Please tell us why you chose [Q41] (more than one answer may be selected)?</p>	<p>Recommended by adoption organization 60.5%</p> <p>Cost of coverage 32.4%</p> <p>Choice of coverage options 21.4%</p> <p>Online reviews and/or reputation 12.9%</p> <p>Recommended by veterinary clinic 12.9%</p>

Aggregate Results

Are you male or female?	Female Male	81.9% 18.1%
Which category below includes your age?	21-29 40-49 50-59 30-39 60 or older	25.5% 19.5% 18.9% 17.9% 14.9%
What is the highest level of school you have completed or the highest degree you have received?	Bachelor degree Some college but no degree Graduate degree High school degree or equivalent (e.g., GED) Less than high school degree	34.1% 32.8% 19.7% 12.5% 0.9%
What language do you mainly speak at home?	English Spanish Chinese Russian French	98.3% 0.9% 0.3% 0.2% 0.2%
Which language do you prefer to use outside of the home?	English Spanish Russian French Chinese	98.9% 0.5% 0.2% 0.2% 0.1%
Which of the following categories best describes your employment status?	Employed Retired Unemployed Disabled; not able to work	73.4% 11.6% 10.1% 4.9%
What is your current total annual household income?	\$34,999 or less \$35,000 to \$59,999 \$60,000 to \$79,999 \$100,000 to \$149,999 \$80,000 to \$99,999	32.3% 26.4% 15.3% 10.5% 10.1%