Background & Objectives

- April 2013 Amárach Research commissioned to conduct a survey – 300 cat and dog owners and 300 non pet owners.

- The survey focused on the areas of well being in relation to pet ownership, animal welfare, the spaying/neutering and microchipping of cats and dogs.

- The objective of this research was to provide solid statistics and trends in relation to animal welfare and cat and dog ownership in Ireland.
Number of Cats/Dogs Owned

Number of Cats
(Base: All who own a cat – 155)

<table>
<thead>
<tr>
<th>Number of Cats</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>30%</td>
</tr>
<tr>
<td>2</td>
<td>56%</td>
</tr>
<tr>
<td>3</td>
<td>7%</td>
</tr>
<tr>
<td>4+</td>
<td>7%</td>
</tr>
<tr>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

Mean Score: 1.8

Number of Dogs
(Base: All who own a dog – 232)

<table>
<thead>
<tr>
<th>Number of Dogs</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>21%</td>
</tr>
<tr>
<td>2</td>
<td>70%</td>
</tr>
<tr>
<td>3</td>
<td>6%</td>
</tr>
<tr>
<td>4+</td>
<td>3%</td>
</tr>
<tr>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

Mean Score: 1.5

Thursday 8 May 14
Aquisition Channels

Cat owners (155)
Dog owners (232)

Research Used

<table>
<thead>
<tr>
<th>Method</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spoke to family/friend</td>
<td>32</td>
</tr>
<tr>
<td>Spoke to a vet</td>
<td>15</td>
</tr>
<tr>
<td>Researched online</td>
<td>14</td>
</tr>
<tr>
<td>Always had cat/dog</td>
<td>13</td>
</tr>
<tr>
<td>Cat/Dog sat for friend/family member</td>
<td>9</td>
</tr>
<tr>
<td>Looked at online adverts</td>
<td>5</td>
</tr>
<tr>
<td>Spoke to breeder</td>
<td>5</td>
</tr>
<tr>
<td>Don’t know/did not research</td>
<td>12</td>
</tr>
</tbody>
</table>

Most Useful

<table>
<thead>
<tr>
<th>Method</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spoke to family/friend</td>
<td>27</td>
</tr>
<tr>
<td>Cat/Dog sat for friend/family member</td>
<td>24</td>
</tr>
<tr>
<td>Spoke to a welfare group</td>
<td>12</td>
</tr>
<tr>
<td>Spoke to a vet</td>
<td>10</td>
</tr>
<tr>
<td>Always had cat/dog</td>
<td>6</td>
</tr>
<tr>
<td>Researched online</td>
<td>5</td>
</tr>
<tr>
<td>Spoke to breeder</td>
<td>4</td>
</tr>
<tr>
<td>Looked at online adverts</td>
<td>2</td>
</tr>
<tr>
<td>Don’t know/did not research</td>
<td>13</td>
</tr>
</tbody>
</table>

(Q8a/b)

Thursday 8 May 14
The Acquisition Channel Actually Chosen

Cat owners (155)
Dog owners (232)

- From family member / friends litter: 26% (Cat) 21% (Dog)
- Stray: 5% (Cat) 25% (Dog)
- Welfare group/animal shelter: 18% (Cat) 18% (Dog)
- Family member/friend: 12% (Cat) 8% (Dog)
- I breed my own litter and kept it (breed own family pet): 5% (Cat) 10% (Dog)
- Registered breeder: 3% (Cat) 16% (Dog)
- Pet store: 1% (Cat) 4% (Dog)
- Online: 1% (Cat) 13% (Dog)
- Other: 3% (Cat) 2% (Dog)
- Don’t know: 1% (Cat) 1% (Dog)
Reason for Using Acquisition Channel – Dog

**From family/friends litter**
- They had the breed of dog I was looking for: 40%
- It was convenient: 32%
- It was less expensive than other channels: 26%
- Channel was suggested by a family member/friend: 21%

**Welfare group/Shelter**
- I wanted to rescue: 58%
- Staff were helpful and trustworthy: 37%
- I was concerned that other channels may get their dogs from puppy farms or bad breeders: 24%

**Registered Breeder**
- They had the breed of dog I was looking for: 74%
- I was concerned that other channels may get their dogs from puppy farms or bad breeders: 29%
- 0%
### Reason for Using Acquisition Channel – Cat

<table>
<thead>
<tr>
<th>From family/friends litter</th>
<th>Stray</th>
<th>Welfare group/shelter</th>
</tr>
</thead>
<tbody>
<tr>
<td>It was convenient</td>
<td>I wanted to rescue</td>
<td>I wanted to rescue</td>
</tr>
<tr>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>63</td>
<td>76</td>
<td>93</td>
</tr>
<tr>
<td>It was less expensive than other channels</td>
<td>It was convenient</td>
<td>Staff were helpful and trustworthy</td>
</tr>
<tr>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>22</td>
<td>24</td>
<td>21</td>
</tr>
<tr>
<td>Channel was suggested by family member/friend</td>
<td>Less expensive than other channels</td>
<td>I had used this channel previously</td>
</tr>
<tr>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>20</td>
<td>24</td>
<td>14</td>
</tr>
<tr>
<td>Cat just needed a home</td>
<td></td>
<td>I wanted a pet that was spayed, neutered and had vaccinations</td>
</tr>
<tr>
<td>%</td>
<td></td>
<td>%</td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>14</td>
</tr>
</tbody>
</table>

- **From family/friends litter**: 63% said it was convenient, 22% said it was less expensive than other channels, 20% said the channel was suggested by a family member/friend, and 15% said the cat just needed a home.
- **Stray**: 76% said they wanted to rescue, 24% said it was convenient, and 22% said it was less expensive than other channels.
- **Welfare group/shelter**: 93% said they wanted to rescue, 21% said staff were helpful and trustworthy, 14% said they had used this channel previously, and 14% said they wanted a pet that was spayed, neutered and had vaccinations.
Reasons why didn’t choose Welfare group / Pound

Cat owners (108)
Dog owners (181)

I wanted a kitten/puppy
Did not choose to adopt a cat
The adoption process is too difficult
I don’t know very much about pet adoption
Don’t know what you will get with a sheltered animal
I did not want a second hand cat/dog

Feel animal from welfare group might be vicious or have something wrong with them
Offered a cat/dog from elsewhere
I wanted a pedigree dog
I don’t know the history of the animal
Did not have desired breed

DoneDeal
(Q11)
Perceptions of non pet owners

- Research before getting a pet
- Channel most likely to be chosen
- Reasons why I wouldn’t choose to adopt
Research options BEFORE Getting Pet – Non Pet Owners

Cat owners (56)*
Dog owners (160)

- Speak to family/friend with a cat/dog: 59% (59) vs. 48% (48)
- Speak to a welfare group: 45% (45) vs. 46% (46)
- Research online: 32% (32) vs. 51% (51)
- Speak to a vet: 20% (20) vs. 23% (23)
- Speak to a breeder: 16% (16) vs. 17% (17)
- Mind a cat/dog as a trial: 13% (13) vs. 20% (20)
- Look at online adverts (classified): 7% (7) vs. 15% (15)
- Speak to a trainer: 0% (0) vs. 13% (13)
- Other: 2% (2) vs. 1% (1)
- Don’t know: 2% (2) vs. 3% (3)
Acquisition – Option Most Likely to Choose – Non Pet Owners

Cat owners (56)*
Dog owners (160)

- **Welfare group or shelter**: 52% (Cat owners) vs 53% (Dog owners)
- **From family**: 21% (Cat owners) vs 12% (Dog owners)
- **Family member/friend**: 13% (Cat owners) vs 2% (Dog owners)
- **Registered breeder**: 7% (Cat owners) vs 11% (Dog owners)
- **Stray**: 4% (Cat owners) vs 1% (Dog owners)
- **Other breeder**: 2% (Cat owners) vs 2% (Dog owners)
- **Don’t know**: 2% (Cat owners) vs 2% (Dog owners)

(Q14.20)
Reasons why Non-Pet Owner Would Not Choose Welfare Group/Pound

Cat owners (27)*
Dog owners (60)*

I would want a kitten/puppy

I don’t know very much about pet adoption

Don’t know what you will get with a shelter animal

I don’t know the history of the animal

I would prefer a pedigree dog

Feel the animal might be vicious or have something wrong with them

Feel previously owned pets can never really bond with you

Feel welfare groups are sad places

%
Understanding of Welfare Groups

- Knowledge and Concern
- Awareness
- Perception
Knowledge and Concern for Animal Welfare

**Knowledge of Animal Welfare**

**PET OWNERS**
- Familiar (10-7): 33%
- Somewhat familiar (6-4): 54%
- Unfamiliar (3-1): 0%
- Mean: 0%

**NON PET OWNERS**
- Familiar (10-7): 31%
- Somewhat familiar (6-4): 44%
- Unfamiliar (3-1): 25%
- Mean: 0%

**Concern for Animal Welfare**

**PET OWNERS**
- Concerned (10-8): 5%
- Somewhat concerned (7-5): 26%
- Unconcerned (4-1): 0%
- Mean: 0%

**NON PET OWNERS**
- Concerned (10-8): 19%
- Somewhat concerned (7-5): 42%
- Unconcerned (4-1): 39%
- Mean: 0%

(Q4,5,8,9)
Spontaneous VS Prompted Awareness of Animal Welfare Groups

Pet owners
Non pet owners

Spontaneous % Prompted

Local Pound

PAWS Animal Rescue

Other regional SPCA
### Perception of Welfare Groups

<table>
<thead>
<tr>
<th>Perception</th>
<th>Pet Owner</th>
<th>Non Pet Owner</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall positive perception</td>
<td>53</td>
<td>51</td>
<td></td>
</tr>
<tr>
<td>Dedicated to supporting animal welfare</td>
<td>18</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>They deserve more support</td>
<td>12</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Undervalued</td>
<td>10</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>They are well needed organisations</td>
<td>7</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Negative perception</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>They are caring people</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Doing best to rehome animals</td>
<td>5</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Too extremist</td>
<td>3</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Good but fighting a loosing battle</td>
<td>3</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

Thursday 8 May 14
How Many Dogs are there in Ireland?

- Data taken from UCD study* 2009 –
- CSO 2011
- Pound statistics 2012
- Amarach Research 2013

Demography of the pet dog and pet cat Population on the island of Ireland and human factors influencing pet ownership

Martin Downes, Mary J. Canty, Simon J. More
Dog numbers in Ireland

From the UCD research of 2009 we know that:

35.6% of households in ROI have one or more dogs

CSO 2011 identified 1,658,243 households

35.6% = 590,334 households with one or more pet dogs

2013 Amarach Research indicates there are 1.5 dogs per household

= 885,501 dogs

That’s a lot of dogs!
Dog Numbers in Ireland

800,000+ dogs in Ireland!
Conservatively if there is 10% Natural attrition annually (death by old age, sickness, injury, lost etc.)

There is a demand of approximately 80,000 dogs annually in ROI
Meeting The Demand

Based on pound statistics & UCD research it is estimated that welfare groups and pounds are rehoming 10% of that number.

From UCD study – approximately 40% of welfare/pound dogs are transferred abroad.

Therefore – up to 70,000 dogs annually in Ireland being supplied by breeders, breeding establishments, unwanted litters thorough a variety of channels.
Even though respondents perception of online channels is low, online has become a prominent channel for research and purchase of pets.

People are choosing to adopt animals from welfare groups because they want to rescue an animal.

Respondents said they would not adopt from a welfare group as they would want a younger animal and they are uncertain about the history and temperament of the animal.

Spontaneous awareness of animal welfare groups is low, however when prompted awareness was high. Overall perception of animal welfare groups is high.
Our aim with the research was to have data that wasn’t anecdotal.

Even if every welfare group/pound rehomed every animal in their care, then we would still have a huge shortfall in demand and the need to regulate breeding and improve welfare standards is paramount.