

PIJAC

2013 Survey of Customers



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Research**

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The findings cited in this report are based on a survey supported by the Pet Industry Joint Advisory Council (PIJAC).

PURPOSE

Through the use of an online survey representing emailable customers who purchased puppies from All Pets Club, Puppies of Westport, and The Dog House from varying periods dating back to 2008, the purpose of this research project was twofold: to gather information on puppy purchase experiences, and opinions of the proposed legislation to ban the sale of dogs, cats, and rabbits in Connecticut pet stores unless they are rescues, from shelters, or from other non-profit sources.

The survey sample of 3,401 represented the following at the time of sample selection:

- All 1,992 emailable **All Pets Club** customers who purchased puppies since January 2010
- All 1,398 emailable **Puppies of Westport** customers who purchased puppies since 2008
- All 11 emailable **The Dog House** customers who purchased puppies since 2009

Data was collected via an online survey from November 5 to November 14, 2013. The survey was closed for tabulation with 464 usable responses—a 15% response rate based on the net effective mailout of 3,178. As with any research, the results should be interpreted with the potential of non-response bias in mind. It is unknown how those who responded to the survey may be different from those who did not respond. In general, the higher the response rate, the lower the probability of estimation errors due to non-response and thus, the more stable the results.

The margin of error for percentages based on 464 usable responses is ± 4.2 percentage points at the 95% confidence level. The margin of error for percentages based on smaller sample sizes will be larger.

(Please refer to the Appendix for details of the survey method.)

METHOD

Readex Research is a nationally recognized independent research company located in Stillwater, Minnesota. Its roots are in survey research for the magazine publishing industry, but specialization in conducting high-quality survey research (by mail and/or the Internet) has brought clients from many other markets, including associations, corporate marketers and communicators, and government agencies. Since its founding in 1947, Readex has completed thousands of surveys for hundreds of different clients.

As a full-service survey research supplier, Readex offers professional services, and in-house processing of all phases of each project (traditional mailing, broadcast emailing, and data processing) to ensure complete control over project quality and schedule. Analytical capabilities include a range of multivariate statistics and modeling techniques in addition to the more traditional stub-and-banner tabulations.

This survey was conducted and this report was prepared by Readex in accordance with accepted research standards and practices.

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DATA TABLES

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DATA TABLES

Data Interpretation

In addition to percentages, three summary statistics may be presented in this report for numeric variables.

A **mean** is the arithmetic average of a distribution (i.e., a set of values). Because it is arithmetically calculated, it can be multiplied by the population represented to present a total volume estimate. For example, if 100 survey respondents (representing 10,000 people in the population) reported mean expenditures of \$100 each, total expenditures for that population are estimated as $10,000 \times \$100 = \$1,000,000$. Means are very much influenced by extremely large or extremely small values in the distribution (e.g., one millionaire can substantially raise an estimate of average income).

Means for grouped data are calculated using the midpoint of each range. The lowest-valued group is represented by its largest value; the highest-valued group by its lowest.

The **standard error** measures the variability associated with the survey's estimate of a population mean. The standard error is analogous to the margin of error associated with percentages: that is, 95% of the time we expect the true (unknown) population mean to be within plus-or-minus two standard errors of the mean calculated from the sample. A standard error that is large in proportion to the mean indicates a high level of statistical instability; trending and projections against such estimates should be undertaken cautiously.

A **median** is the value that lies at the middle of a distribution: that is, 50% of the values are above it and 50% are below. It represents the "typical" response, and is not influenced by extreme values. For most distributions, the median will be either roughly equal to, or significantly smaller than the mean.

Medians for grouped data are calculated by locating the group which contains the 50th percentile, then interpolating between the lower and upper bounds to estimate the precise value. Only the values listed *above* the statistics on a data table are used in the calculations.

TABLE 000 page 1

Key to Tables

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: all respondents	464	52	51	50	378	35	48
margin of error at 95% confidence (percentage points):	±4.2	±12.6	±12.8	±12.9	±4.7	±15.4	±13.2

*The margin of error for results based on fewer than 30 responses cannot be meaningfully calculated and the results are considered statistically unstable.

Segment	Description
TOTAL	all respondents
YEAR OF PURCHASE	those indicating their puppy purchase took place in:
2013	2013
2012	2012
2011 or before	2011 or before
PUPPY PURCHASE EXPERIENCE	those indicating their overall puppy purchase experience at their respective store as:
Positive	Positive or Very Positive
Neutral	Neutral
Negative	Negative or Very Negative

TABLE 001 page 1

Overall Purchase Experience

1. How would you describe your overall puppy purchase experience at [PET STORE]?

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: all respondents	464 100%	52 100%	51 100%	50 100%	378 100%	35 100%	48 100%
Very Positive	267 58%	33 63%	33 65%	39 78%	267 71%	0 0%	0 0%
Positive	111 24%	10 19%	6 12%	7 14%	111 29%	0 0%	0 0%
Neutral	35 8%	4 8%	4 8%	1 2%	0 0%	35 100%	0 0%
Negative	24 5%	0 0%	3 6%	3 6%	0 0%	0 0%	24 50%
Very Negative	24 5%	5 10%	5 10%	0 0%	0 0%	0 0%	24 50%
No answer	3 1%	0 0%	0 0%	0 0%	0 0%	0 0%	0 0%

TABLE 002 page 1

Satisfaction With Puppy

2. How satisfied are you with the puppy that you purchased from [PET STORE]?

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: all respondents	464 100%	52 100%	51 100%	50 100%	378 100%	35 100%	48 100%
Very Satisfied	355 77%	41 79%	40 78%	42 84%	331 88%	15 43%	8 17%
Satisfied	51 11%	3 6%	3 6%	4 8%	38 10%	7 20%	5 10%
Neutral	12 3%	2 4%	0 0%	1 2%	2 1%	5 14%	5 10%
Dissatisfied	24 5%	1 2%	5 10%	2 4%	2 1%	6 17%	16 33%
Very Dissatisfied	15 3%	5 10%	2 4%	0 0%	2 1%	1 3%	12 25%
No answer	7 2%	0 0%	1 2%	1 2%	3 1%	1 3%	2 4%

TABLE 003 page 1

Length of Time to Find Dog

3. How long did it take you to find the dog you ultimately brought home?

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: all respondents	464 100%	52 100%	51 100%	50 100%	378 100%	35 100%	48 100%
A day	219 47%	19 37%	19 37%	29 58%	181 48%	13 37%	23 48%
A few days	73 16%	11 21%	9 18%	6 12%	58 15%	7 20%	8 17%
A week	30 6%	4 8%	1 2%	3 6%	24 6%	4 11%	2 4%
A few weeks	56 12%	6 12%	10 20%	4 8%	47 12%	3 9%	5 10%
A month or more	84 18%	12 23%	12 24%	8 16%	66 17%	8 23%	10 21%
No answer	2 0%	0 0%	0 0%	0 0%	2 1%	0 0%	0 0%

TABLE 004 page 1

Other Sources Considered

4. What other sources of pets did you consider before you found the dog you ultimately brought home?

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: all respondents (multiple answers)	464 100%	52 100%	51 100%	50 100%	378 100%	35 100%	48 100%
Rescue group or other non-profit organization	206 44%	29 56%	23 45%	25 50%	165 44%	17 49%	24 50%
Shelter	204 44%	23 44%	27 53%	28 56%	164 43%	20 57%	20 42%
Hobby breeder or direct seller	203 44%	23 44%	22 43%	22 44%	172 46%	12 34%	19 40%
Internet retailer	90 19%	14 27%	15 29%	9 18%	79 21%	6 17%	4 8%
Other	60 13%	9 17%	3 6%	6 12%	48 13%	6 17%	5 10%
Indicated at least one	420 91%	49 94%	46 90%	46 92%	345 91%	31 89%	42 88%
No answer	44 9%	3 6%	5 10%	4 8%	33 9%	4 11%	6 13%

TABLE 005 page 1

Factors Leading to Purchase Decision

5. What factors led to your decision to buy the dog you ultimately brought home?

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: all respondents (multiple answers)	484 100%	52 100%	51 100%	50 100%	378 100%	35 100%	48 100%
Direct interaction with the dog	353 76%	38 73%	39 76%	41 82%	304 80%	18 51%	29 80%
Specific breed	273 59%	25 48%	37 73%	31 62%	227 60%	18 51%	28 58%
Positive pet store experience	200 43%	23 44%	29 57%	27 54%	199 53%	0 0%	1 2%
Allergies or other health concerns	90 19%	8 15%	12 24%	11 22%	83 22%	2 6%	5 10%
Warranty on pet store dogs	63 14%	6 15%	11 22%	8 16%	60 16%	1 3%	2 4%
Lack of selection at other places visited	55 12%	6 12%	7 14%	8 16%	48 13%	4 11%	3 6%
Cost	49 11%	4 8%	10 20%	6 12%	44 12%	1 3%	3 6%
Other	44 9%	4 8%	4 8%	6 12%	33 9%	5 14%	5 10%
Indicated at least one	463 100%	52 100%	51 100%	50 100%	378 100%	34 97%	48 100%
No answer	1 0%	0 0%	0 0%	0 0%	0 0%	1 3%	0 0%

TABLE 006 page 1

Pet Store Recommendation

6. Would you recommend that friends purchase a dog from [PET STORE]?

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: all respondents	464 100%	52 100%	51 100%	50 100%	378 100%	35 100%	48 100%
Absolutely	266 57%	36 69%	33 65%	40 80%	264 70%	1 3%	0 0%
Probably	87 19%	5 10%	6 12%	2 4%	84 22%	3 9%	0 0%
Not sure	41 9%	4 8%	4 8%	4 8%	20 5%	17 49%	3 6%
Probably not	25 5%	2 4%	2 4%	2 4%	6 2%	9 26%	9 19%
Definitely not	43 9%	5 10%	6 12%	2 4%	2 1%	5 14%	36 75%
No answer	2 0%	0 0%	0 0%	0 0%	2 1%	0 0%	0 0%

TABLE 007 page 1

Proportion Who Think Connecticut Should Ban Sale of Dogs at Pet Stores

7. Should Connecticut ban the sale of dogs in pet stores (other than those from shelters, pounds and rescue groups)?

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: all respondents	464 100%	52 100%	51 100%	60 100%	378 100%	35 100%	48 100%
Yes	57 12%	6 12%	5 10%	7 14%	16 4%	12 34%	28 58%
No	290 63%	39 75%	38 75%	37 74%	279 74%	7 20%	3 6%
Not sure	114 25%	6 12%	8 16%	6 12%	83 22%	13 37%	17 35%
No answer	3 1%	1 2%	0 0%	0 0%	0 0%	3 9%	0 0%

TABLE 008 page 1

Sources Would Turn to If Ban Goes Into Effect

8. If Connecticut put such a ban into effect, where would you likely turn to acquire a puppy?

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: all respondents (multiple answers)	464 100%	52 100%	51 100%	50 100%	378 100%	35 100%	48 100%
A small local breeder	246 53%	23 44%	24 47%	23 46%	200 53%	19 54%	25 52%
A shelter, rescue or pound directly	161 35%	15 29%	16 31%	13 26%	112 30%	17 49%	31 65%
Directly from an out-of-state breeder	150 32%	15 29%	21 41%	18 36%	132 35%	11 31%	7 15%
A pet store in a neighboring state	103 22%	21 40%	14 27%	10 20%	97 26%	4 11%	1 2%
A pet store selling dogs from shelters, pounds and/or rescue groups	97 21%	11 21%	9 18%	12 24%	77 20%	11 31%	9 19%
A seller over the Internet	67 14%	12 23%	6 12%	10 20%	62 16%	4 11%	1 2%
Indicated at least one	375 81%	39 75%	41 80%	40 80%	300 79%	29 83%	43 90%
Not sure	86 19%	13 25%	9 18%	10 20%	76 20%	5 14%	5 10%
No answer	3 1%	0 0%	1 2%	0 0%	2 1%	1 3%	0 0%

TABLE 009 page 1

Respondent Status

Please check one or more of the items below:

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: all respondents (multiple answers)	464 100%	52 100%	51 100%	50 100%	378 100%	35 100%	48 100%
I am willing to be contacted to talk more about this issue	128 28%	39 75%	36 75%	39 78%	103 27%	7 20%	18 38%
I am willing to be identified along with my responses above	106 23%	36 69%	28 55%	27 54%	89 24%	3 9%	14 29%
Indicated at least one	177 38%	52 100%	51 100%	50 100%	145 38%	9 26%	23 48%
I wish to remain anonymous along with my responses	266 57%	0 0%	0 0%	0 0%	217 57%	23 66%	23 48%
No answer	21 5%	0 0%	0 0%	0 0%	16 4%	3 9%	2 4%

TABLE 010 page 1

Year Purchased

	TOTAL	YEAR OF PURCHASE			PUPPY PURCHASE EXPERIENCE		
		2013	2012	2011 or before	Positive	Neutral	Negative
Base: those willing to be contacted/identified	177 100%	52 100%	51 100%	50 100%	145 100%	9 100%	23 100%
2013	52 29%	52 100%	0 0%	0 0%	43 30%	4 44%	5 22%
2012	51 29%	0 0%	51 100%	0 0%	39 27%	4 44%	8 35%
2011	34 19%	0 0%	0 0%	34 68%	30 21%	1 11%	3 13%
Before 2011	16 9%	0 0%	0 0%	16 32%	16 11%	0 0%	0 0%
Mean:	2012	2013	2012	2010	2012	2012	2012
Standard error:	0	0	0	0	0	0	0
Median:	2012	2013	2012	2011	2012	2012	2012
No answer	24 14%	0 0%	0 0%	0 0%	17 12%	0 0%	7 30%

Method Details

Survey Correspondence

Questionnaire

APPENDIX



APPENDIX

Method Details

The survey sample of 3,401 represented the following at the time of sample selection:

- All 1,992 emailable **All Pets Club** customers who purchased puppies since January 2010
- All 1,398 emailable **Puppies of Westport** customers who purchased puppies since 2008
- All 11 emailable **The Dog House** customers who purchased puppies since 2009

Of the 3,401 email addresses sampled, 223 were returned as undeliverable (6.6%), resulting in a net effective mailout of 3,178.

The 8-question survey was designed by *PIJAC*. Placement of the survey on a web page, distribution of the electronic survey invitations, and tabulation of the results were handled by Readex.

On November 5, 2013, Readex contacted all sample members via an email which included a link to survey, asking for their participation in the study. An additional email was sent on November 12 to those with deliverable email addresses who had not yet responded.

The survey was closed for tabulation on November 14, 2013 with 464 responses—a 15% response rate based on the net effective mailout. As with any research, the results should be interpreted with the potential of non-response bias in mind. It is unknown how those who responded to the survey may be different from those who did not respond. In general, the higher the response rate, the lower the probability of estimation errors due to non-response and thus, the more stable the results.

The response was tabulated and this report was prepared by Readex in accordance with accepted research standards and practices.

We are contacting you because you purchased a puppy from [Pet Store Name] and we would appreciate your thoughts on that experience.

We are asking you to take a few minutes to respond to this survey to confirm that we have met our goal of providing you with an excellent puppy purchase experience. If you are dissatisfied with us, we need to know that as well so we can continue to make changes that will help our future customers.

To take the online survey, please click on the following link: [\[LINK\]](#)

There is an effort underway to ban the sale of dogs, cats and rabbits in Connecticut pet stores unless they are rescues, from shelters or from some other non-profit sources. This legislation is being advanced despite the fact that Connecticut pet stores are already among the most regulated in the country.

Connecticut pet stores must comply with numerous regulations. They:

- May only acquire puppies from USDA licensed breeders who are inspected annually and whose inspections are readily available online.
- Must have vet inspections of all puppies prior to being delivered and within 48 hours of delivery to the stores.
- Are required to provide a full refund on any puppy found unfit for sale within twenty days as well as for congenital defects within six months.
- Must reimburse customers for up to \$500 for vet expenses for any illness present at the time of purchase.
- Must maintain detailed records on all puppies and are regularly inspected by officers of the CT Department of Agriculture which also follows up on all complaints filed by customers.

Animal rights groups have been pushing for this legislation nationwide claiming that if pet stores are shut down that will result in eliminating the disreputable commercial puppy mills. The truth is that if all pet stores were closed, these puppy mills would continue to market their puppies over the internet or through other underground sources.

This online survey is being conducted by a third party firm that identifies you by a key number that is known only to that third party firm. That key number is unique to you and you may receive a follow-up request from them if you don't respond. Any answers you provide will be confidential (all answers will be tabulated and released with total percentages only) unless you specifically grant permission to make your responses public. We will only contact you if you agree to be contacted by providing us with your contact info at the conclusion of the questionnaire.

Please take the survey now: [\[LINK\]](#)

Thank you for your time!

[Pet Store Name]

APPENDIX

Survey Correspondence:
Email #1



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Experienced. Trusted. Insightful.

Recently we contacted you because you purchased a puppy from [Pet Store Name] and we would appreciate your thoughts on that experience, as we strive to provide excellent service for you and for future customers.

We are also hoping to learn your views on the effort underway to ban the sale of dogs, cats and rabbits in Connecticut pet stores unless they are rescues, from shelters, or from other non-profit sources. This legislation is being advanced despite the fact that Connecticut pet stores are already among the most regulated in the country.

Please take a few minutes now to provide your valued feedback through a very short (8-question) survey.

To take the survey, click on the following link:

[LINK]

Please be assured your answers will be kept confidential and only used in tabulation with others.

Thank you for your time!

[Pet Store Name]

APPENDIX

Survey Correspondence:
Email #2

APPENDIX
Questionnaire

2013 Survey of Connecticut Pet Owners

1. How would you describe your overall puppy purchase experience at ?

- ☐ Very Positive
- ☐ Positive
- ☐ Neutral
- ☐ Negative
- ☐ Very Negative

2. How satisfied are you with the puppy that you purchased from ?

- ☐ Very Satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very Dissatisfied

3. How long did it take you to find the dog you ultimately brought home?

- ☐ A day
- ☐ A few days
- ☐ A week
- ☐ A few weeks
- ☐ A month or more

4. What other sources of pets did you consider before you found the dog you ultimately brought home? (please select all that apply)

- ☐ Shelter
- ☐ Rescue group or other non-profit organization
- ☐ Hobby breeder or direct seller
- ☐ Internet retailer
- ☐ Other

5. What factors led to your decision to buy the dog you ultimately brought home? (please select all that apply)

- ☐ Specific breed
- ☐ Direct interaction with the dog
- ☐ Cost
- ☐ Positive pet store experience
- ☐ Allergies or other health concerns
- ☐ Lack of selection at other places visited
- ☐ Warranty on pet store dogs
- ☐ Other

APPENDIX Questionnaire

6. Would you recommend that friends purchase a dog from ?

- ☐ Absolutely
- ☐ Probably
- ☐ Not sure
- ☐ Probably not
- ☐ Definitely not

7. Should Connecticut ban the sale of dogs in pet stores (other than those from shelters, pounds and rescue groups)?

- ☐ Yes
- ☐ No
- ☐ Not sure

8. If Connecticut put such a ban into effect, where would you likely turn to acquire a puppy? (please select all that apply)

- ☐ A pet store selling dogs from shelters, pounds and/or rescue groups
- ☐ A pet store in a neighboring state
- ☐ A seller over the Internet
- ☐ A small local breeder
- ☐ A shelter, rescue or pound directly
- ☐ Directly from an out-of-state breeder
- ☐ Not sure

Please check one or more of the items below:

- ☐ I am willing to be contacted to talk more about this issue
- ☐ I am willing to be identified along with my responses above
- ☐ I wish to remain anonymous along with my responses

Contact information (only if you checked box 1 and/or 2 above):

Name _____
 City _____
 ZIP Code _____
 Phone _____
 E-Mail _____
 Breed purchased _____
 Date purchased _____

APPENDIX Questionnaire

Any comments or suggestions about improving this online survey experience?

Thank you for your time! Please press the button below to submit your response.

If you have any questions or technical difficulties while taking this online survey, please
click here to contact Readex Research, or use the following contact information:
Scott Myers // Support Specialist
myersb@readexresearch.com // 800.573.2139 x2607

As a proud member of CAPRO,
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click here to learn more.



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