

Lifestyle Feed – Consumer Survey

Conducted by:



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Strategic Mapping & Data Services LLC
10715 Kahlmeyer Dr.
St. Louis, MO 63132

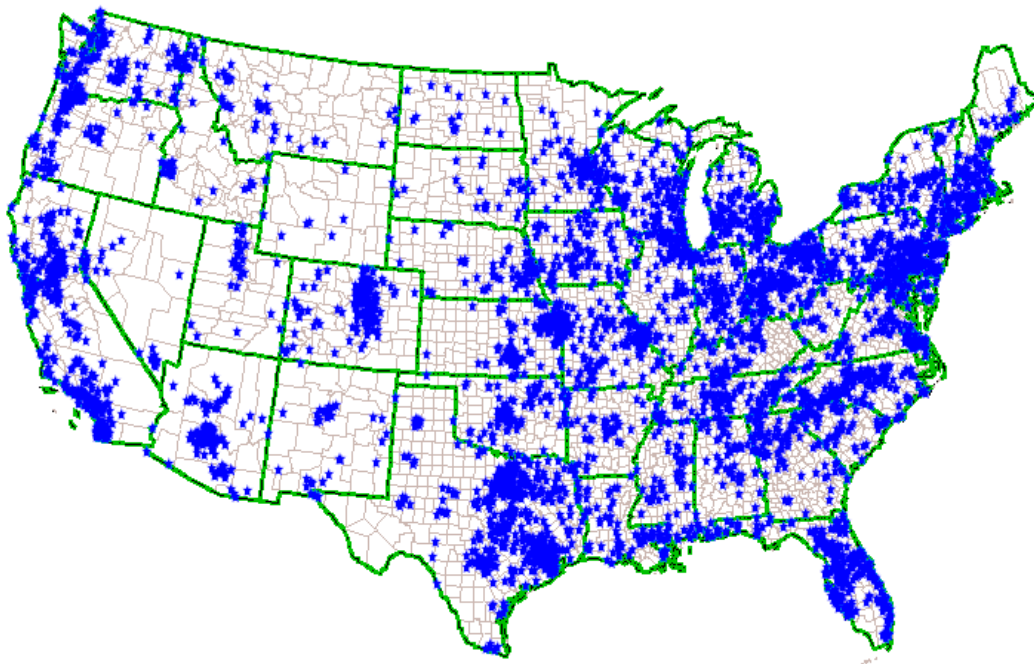
Lifestyle Feed – Consumer Survey

General Background

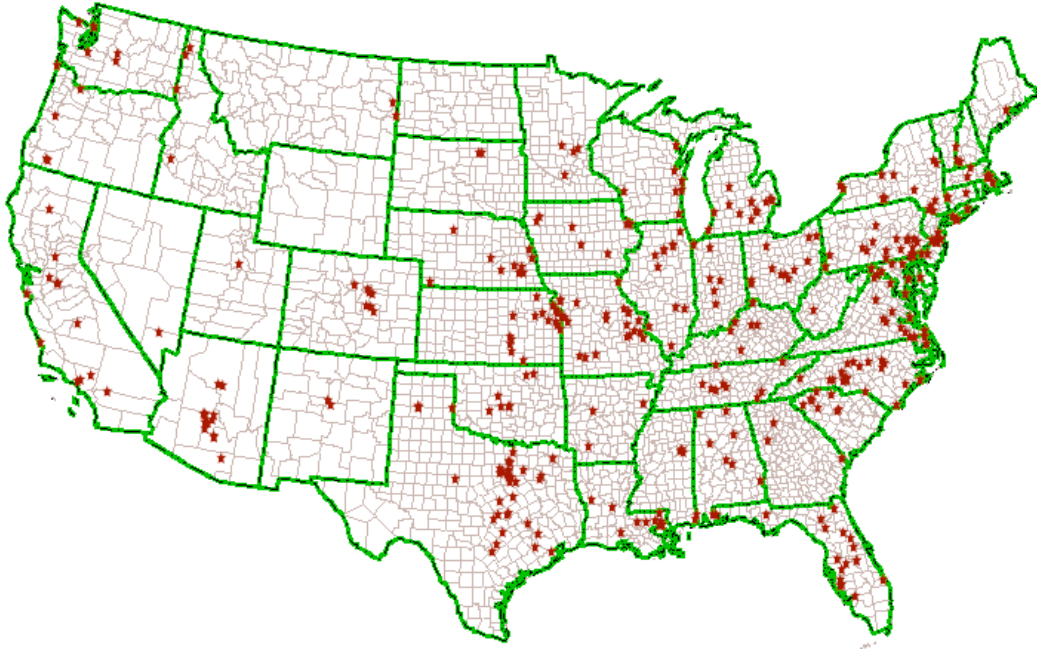
A web based survey was conducted for Land O'Lakes Purina Feed with a group of consumers who had an e-mail address and indicated that it was okay to contact them via e-mail. The sources of the names included the Purina/HOW, Better Animals and Omolene University databases. These combined lists produced 65,980 e-mail invitations. The invitations were e-mailed using proprietary software developed by SM & DS, LLC, over a two week period. A second pass at this list was conducted a month later to those who had not responded to the survey. A total of 5,383 people took the survey resulting in a response rate of 8.16%. (As a note, this is a good response rate for a survey.) A copy of the survey is located in the Appendix.

Map 1 (All) shows the geographical location of those responding to the survey. Map 2 (Customers) shows the geographical location of those consumers who identified themselves as feeding only Purina products to their animals. Lastly, Map 3 (Prospects) shows the geographical location of those respondents who said they do not purchase any Purina products.

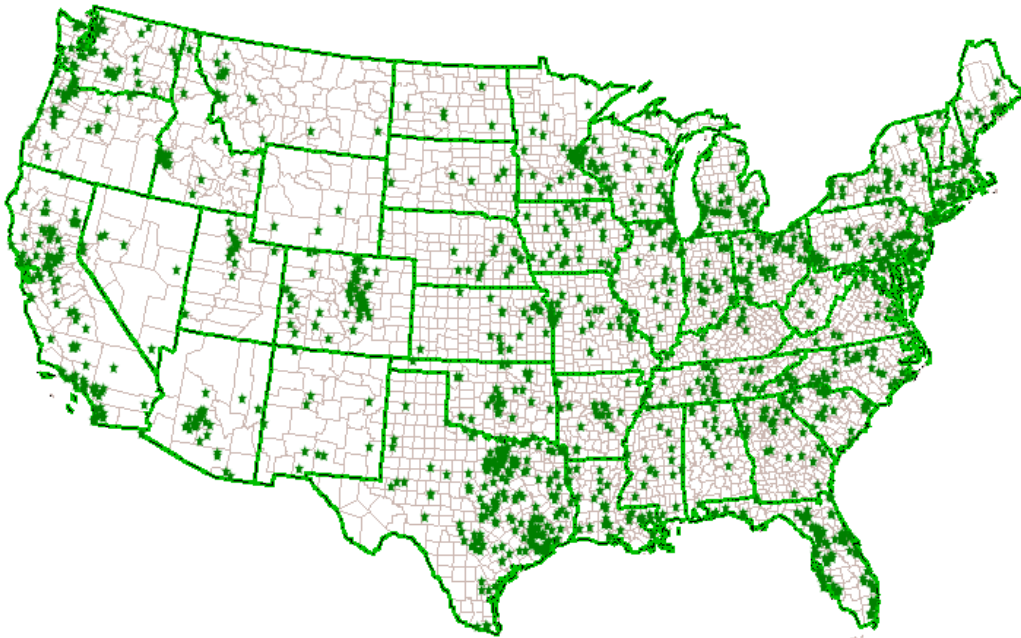
Map 1 – Location of All Respondents



Map 2 – Location of Customer Respondents



Map 3 – Location of Prospect Respondents



Survey Results: All

Demographics

The following general demographics and shopping habits are observed for All respondents. The vast majority, 81%, of the responses were from females (Figure 1); who are 45 to 65 years of age (Figure 2). 50% of the respondents have a college degree, and 60%+ have an annual income in excess of \$50,000 (Figure 4).

In general, this group of consumers is female, well educated with high disposable income.

Figure 1. Gender of Respondents (All)

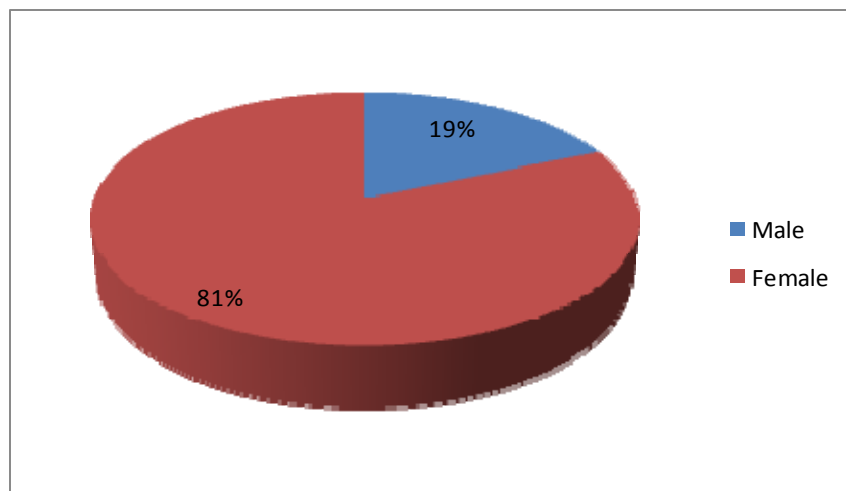


Figure 2. Age of Respondents (All)

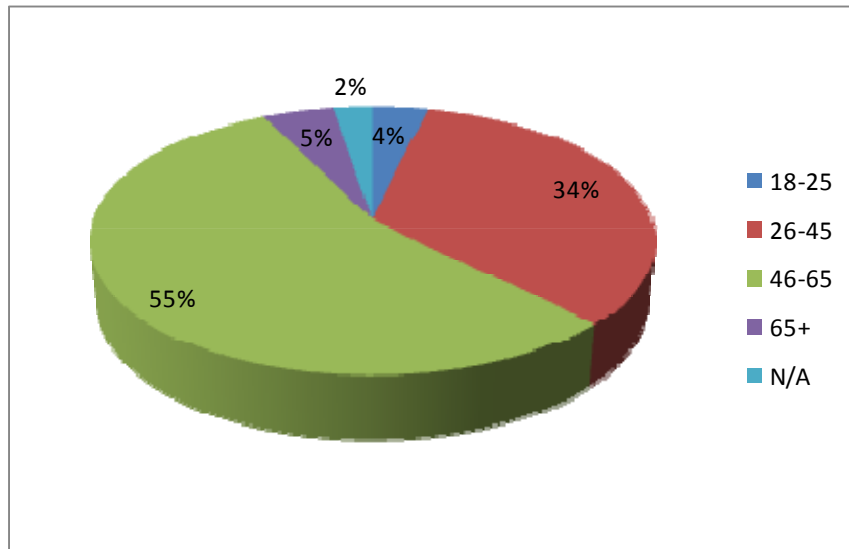


Figure 3. Education of Respondents (All)

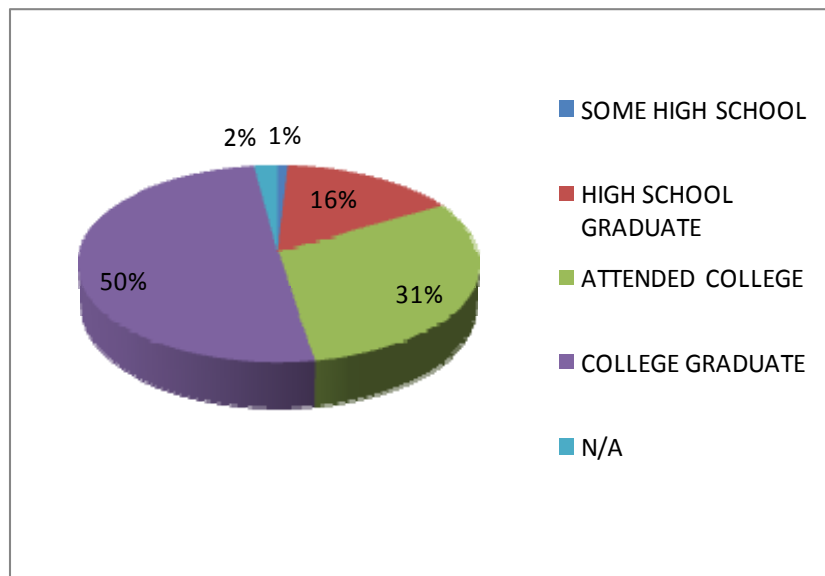


Figure 4. Annual Income of Respondents (All)

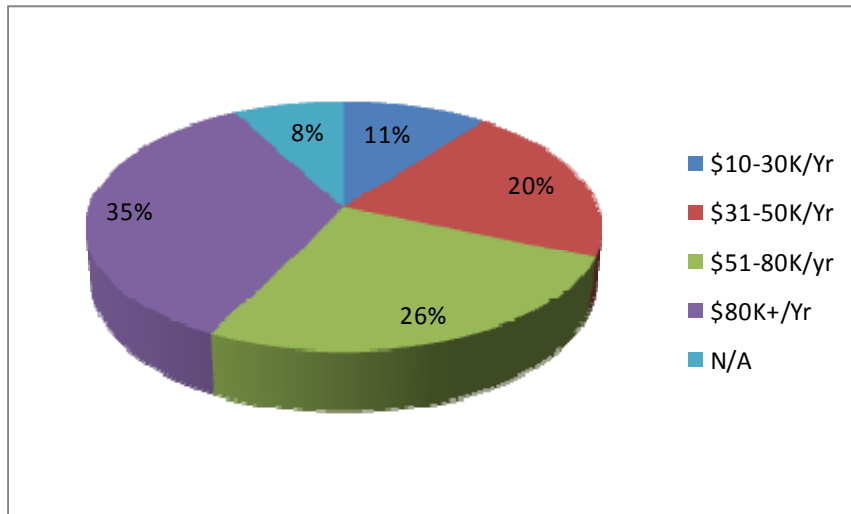
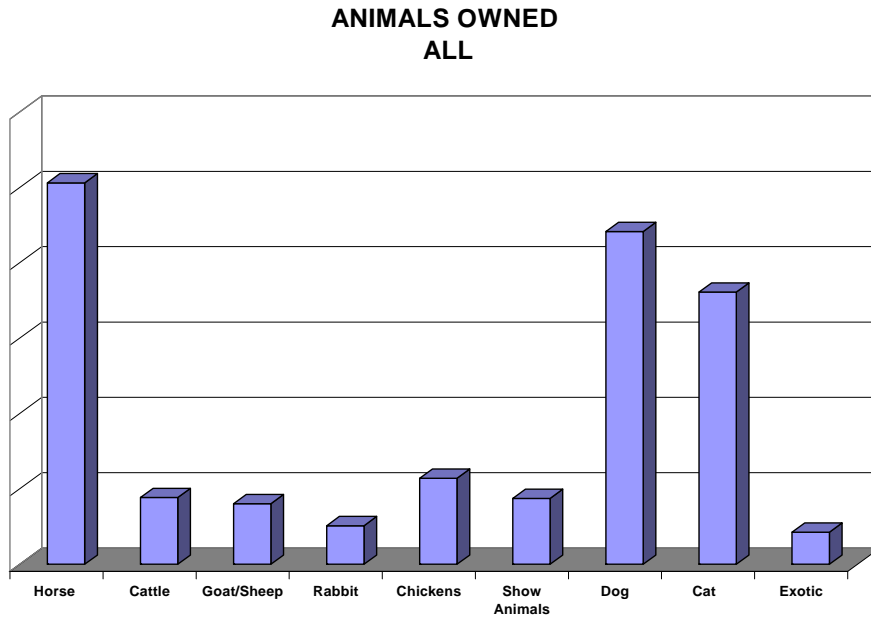


Figure 5. Animals Owned (All)



Shopping Habits

38% of these consumers reported going to the store at least once a week. An additional 43% go to the store at least twice a month (Figure 6). 43% of these consumers live within 10 miles of their shopping preference; however it is also interesting to note that 57% are willing (or are perhaps required) to drive over 10 miles (Figure 7).

It would appear this consumer prefers the convenience, but is willing to travel if necessary.

Figure 6. Shopping Frequency (All)

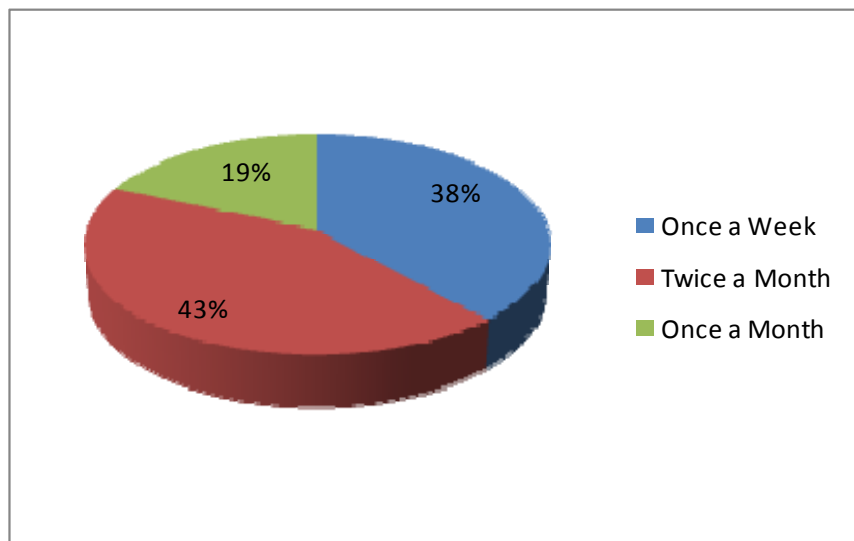
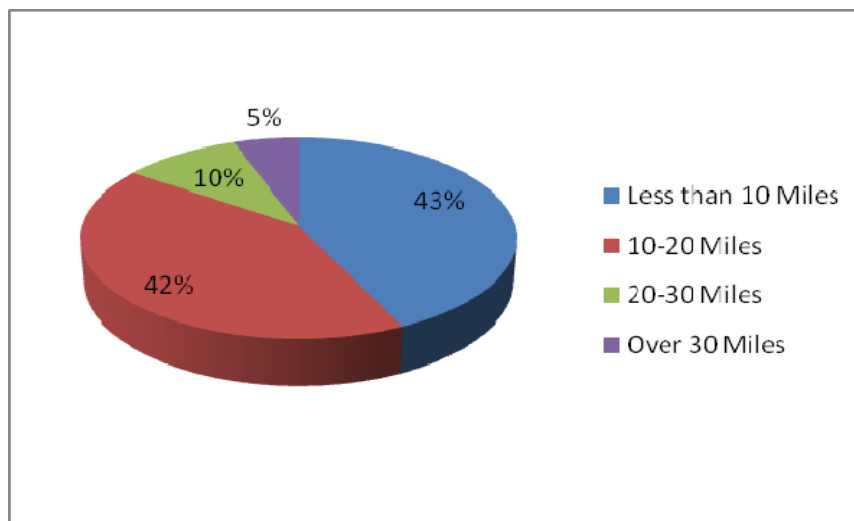


Figure 7. Driving Distance (All)



Elements of the Shopping Experience

The next seven questions asked the respondent to weight the importance of the listed elements of their feed and animal food shopping experience. These are viewed as expectations of the retailer.

The rankings for each element were 1-7: With "1" being Very Important, and "7" as Not Important.

The elements are ranked below (and in Figures 8-14) in the order of most "1" rankings received:

- Prices
- Assortment of Products
- Employee Product Knowledge
- One Stop Shopping
- Store Hours
- Location
- Cleanliness

In general, these consumers want many things from their retailer. Price is always has been, always will be important. However, that doesn't appear to be the only high expectation. All seven of these elements rated Above Average.

Figure 8. Prices (All)

PRICES ALL

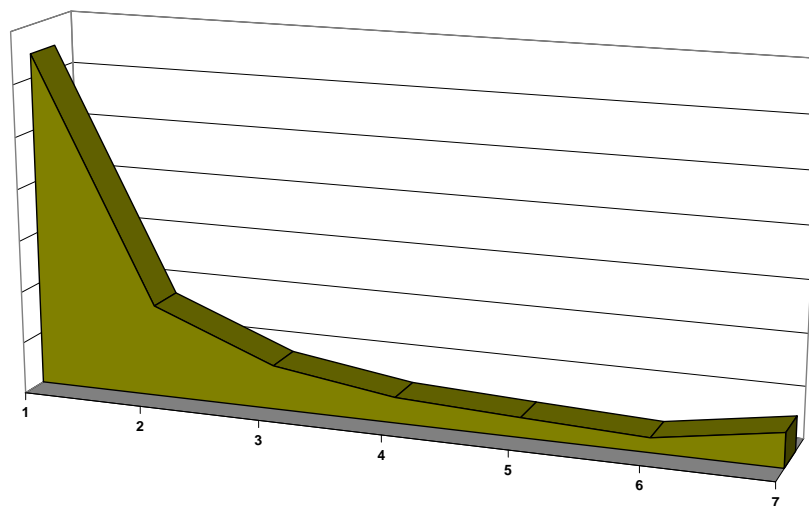


Figure 9. Assortment of Products (All)

**ASSORTMENT OF PRODUCTS
ALL**

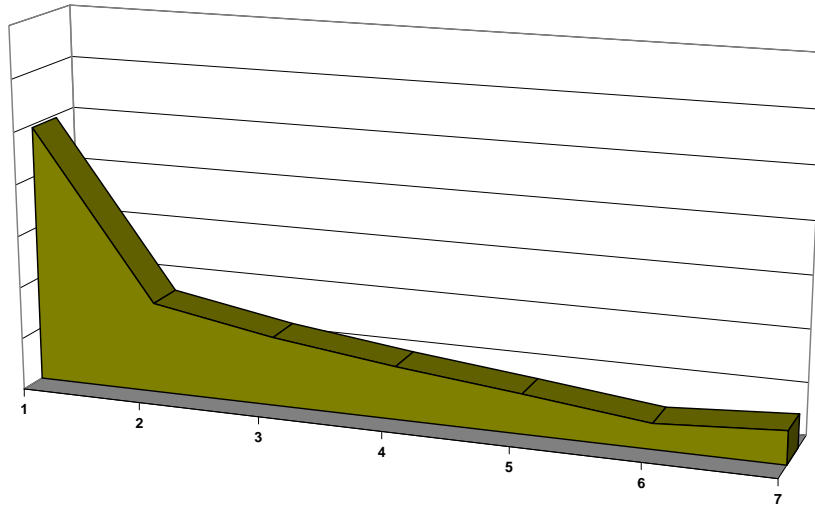


Figure 10. Employee Product Knowledge (All)

**KNOWLEDGEABLE EMPLOYEES
ALL**

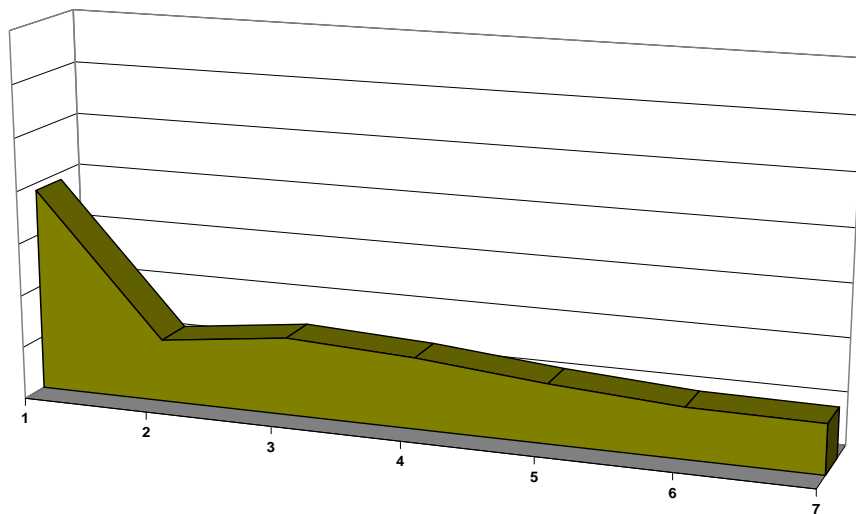


Figure 11. One Stop Shopping (All)

**ONE STOP SHOP
ALL**

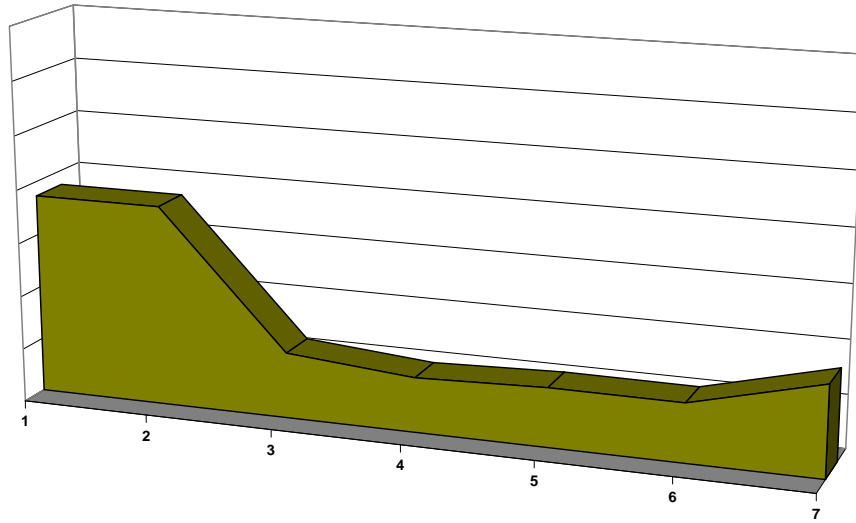


Figure 12. Convenience of Store Hours (All)

**STORE HOURS
ALL**

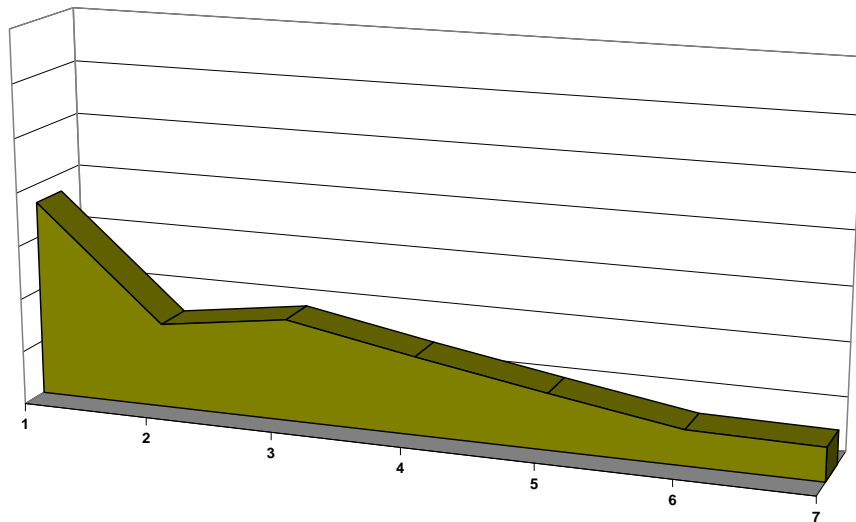


Figure 13. Location of Store (All)

**LOCATION
ALL**

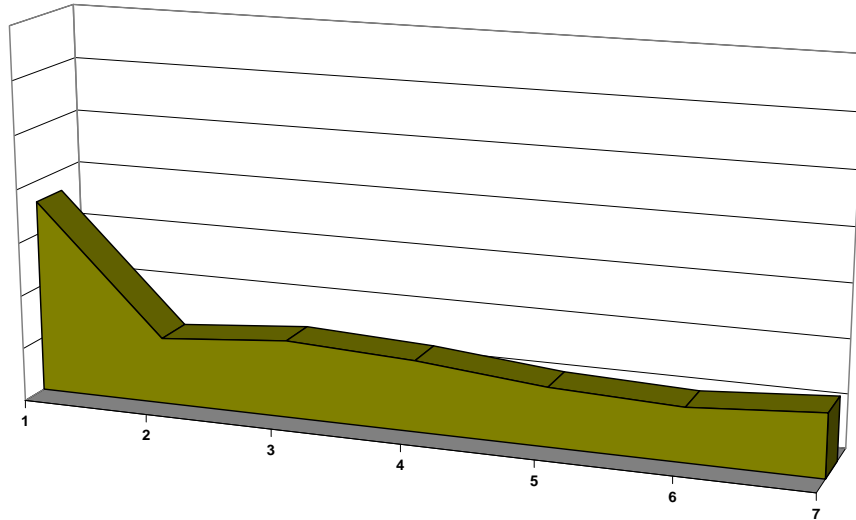
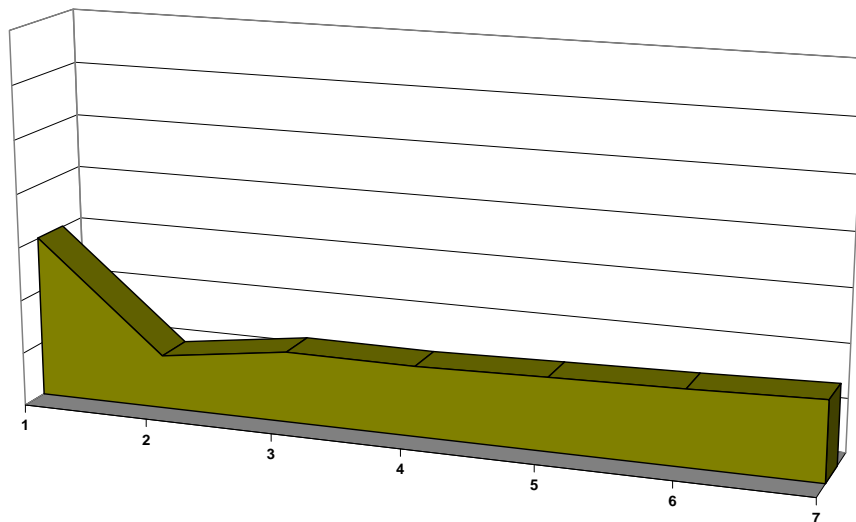


Figure 14. Cleanliness & Look of Store (All)

**CLEANLINESS
ALL**



Evaluation of Current Feed Retailer

The next nine questions asked the respondent to rate their last trip to their feed retailer.

The helpfulness and the knowledge of the store employees (Figures 15–16) both rated high. As a matter of fact, ratings of the employees were the highest of any factors evaluated.

The majority of those responding indicated that the store they visited was clean and well maintained (Figure 17), and that the store atmosphere is appealing (Figure 20) and well lit (Figure 18). The respondents indicated that the store had a good selection of products (Figure 21) and that the desired products were in stock (Figure 19).

Even though the majority of respondents indicated that the prices were competitive (Figure 22) they did so with less force (more just agreed instead of strongly agreed).

It is interesting to note that the respondents were split approximately 50/50 on whether or not they were swayed by impulse buying opportunities (Figure 23). Probably a higher % than would have been expected.

Figure 15. Employees were Helpful and Courteous (All)

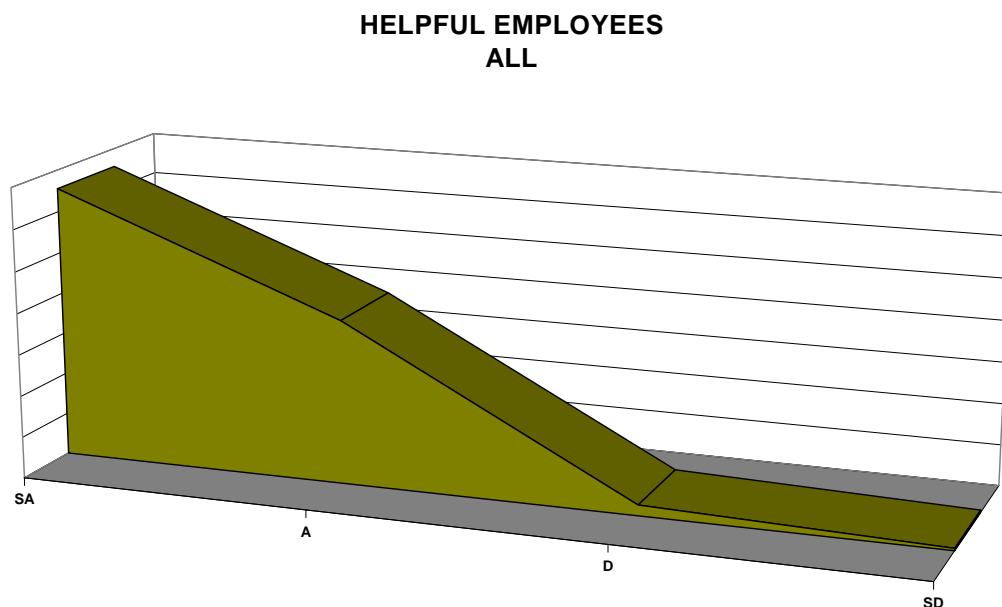


Figure 16. Employees were Knowledgeable About the Products (All)

**KNOWLEDGEABLE
EMPLOYEES**

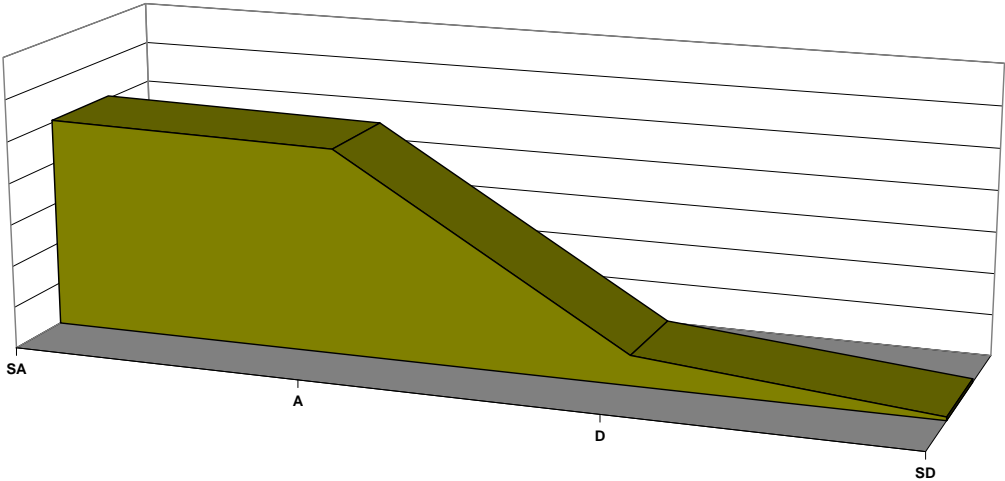


Figure 17. Store was Clean & Well Maintained (All)

**CLEANED & WELL MAINTAINED
ALL**

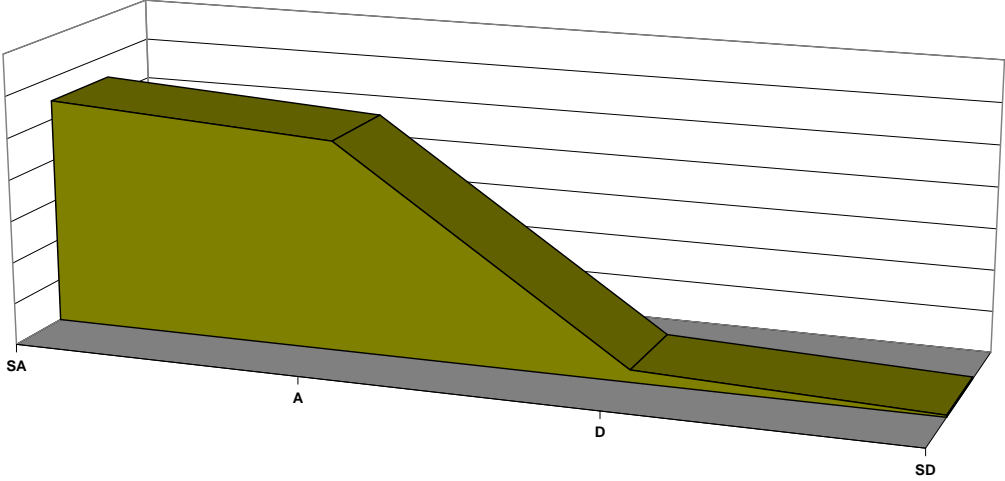


Figure 18. Store was Well Lit (All)

WELL LIT
ALL

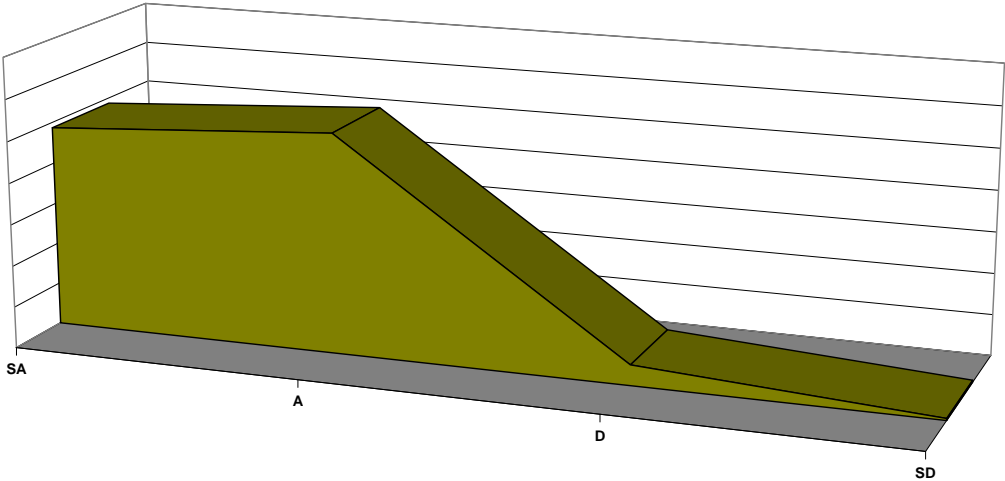


Figure 19. Products were in Stock (All)

PRODUCTS IN STOCK
ALL

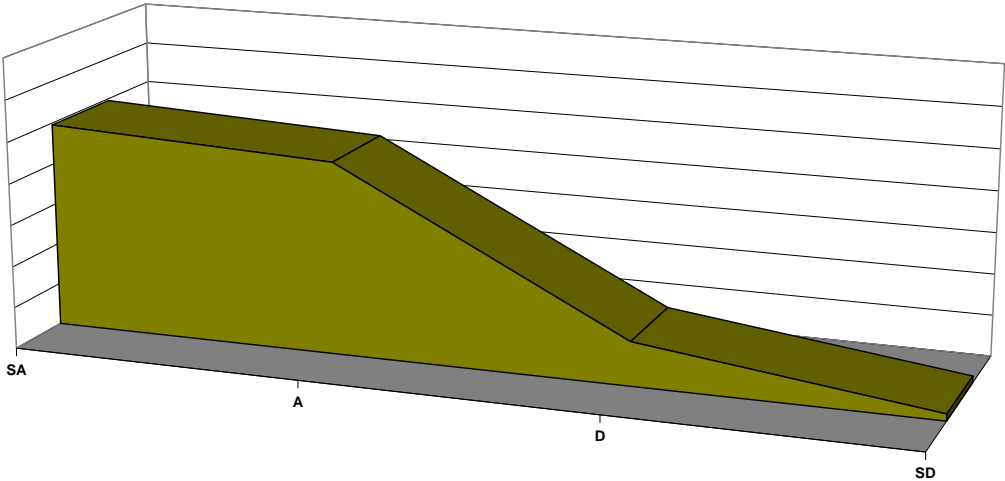


Figure 20. Store Atmosphere & Decor was Appealing (All)

**ATMOSPHERE APPEALING
ALL**

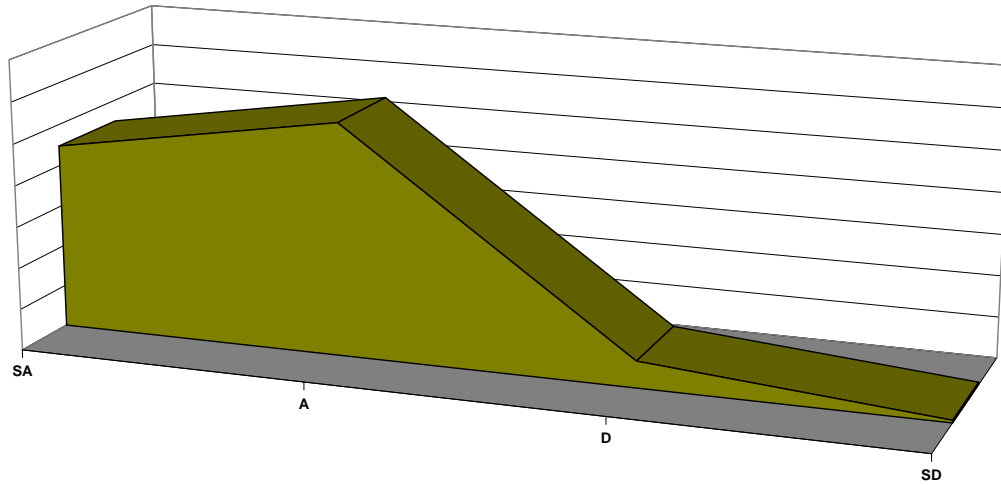


Figure 21. Store had a Good Selection of Products (All)

**GOOD SELECTION
ALL**

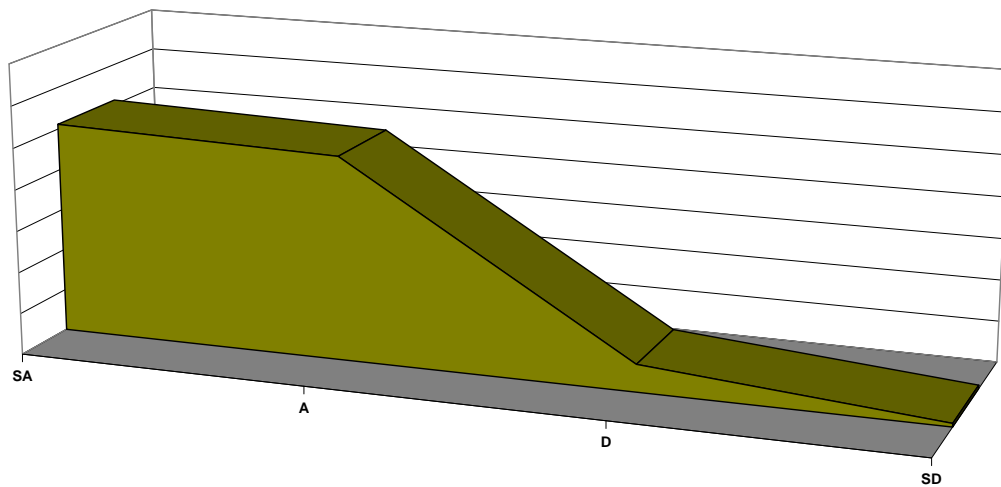


Figure 22. Prices were Competitive with Other Stores (All)

**PRICES COMPETITIVE
ALL**

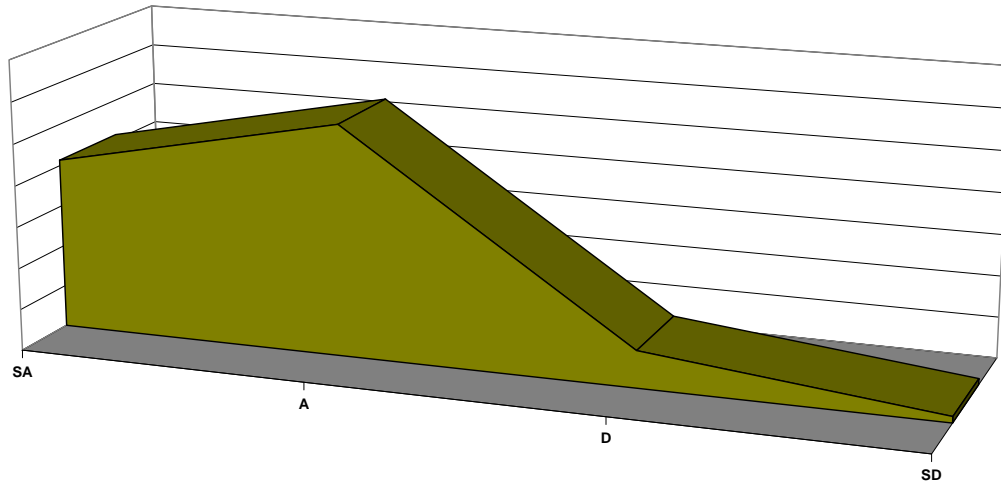
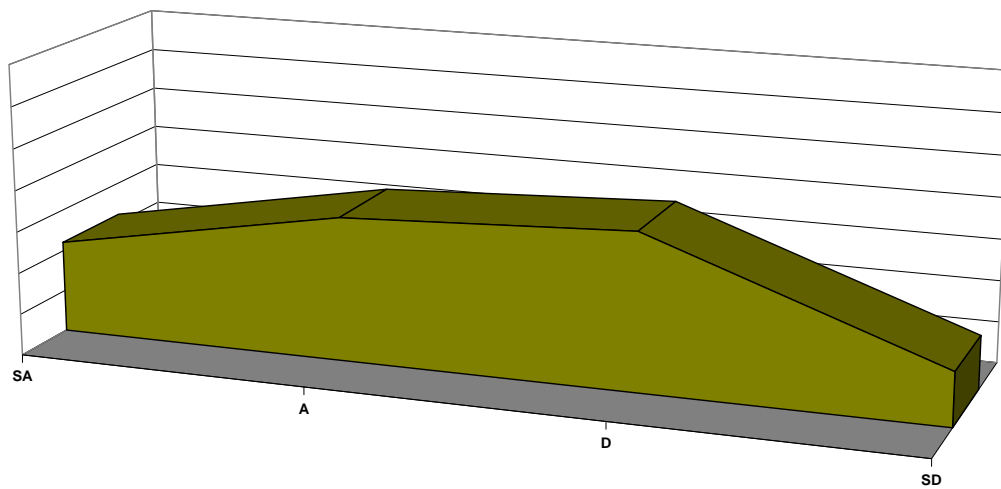


Figure 23. Impulse Buying (All)

**IMPULSE PURCHASE
ALL**



Future Interaction with Current Feed Retailer

The final seven questions are Consumer Action questions.

The responses to the first question indicate that 97% of those surveyed were satisfied with their overall shopping experience at their current feed retailer (Figure 24). 98% indicated that they would continue giving their business to that store (Figure 25). 94% also indicated that they would recommend their feed store to others (Figure 26).

When asked if their current feed retailer communicates with them via e-mail, 73% indicated no (Figure 27). Asked if they would sign up for electronic communications from their feed retailer, 69% indicated that they would (Figure 28).

The majority, 61%, indicated that they were able to purchase all they needed at their feed retailer (Figure 29).

In general, these consumers are happy with their feed retailer and would like to have more interaction with them outside of the store, i.e. electronic communications of information about animals and products.

Figure 24. I am Satisfied with My Overall Experience at this Store (All)

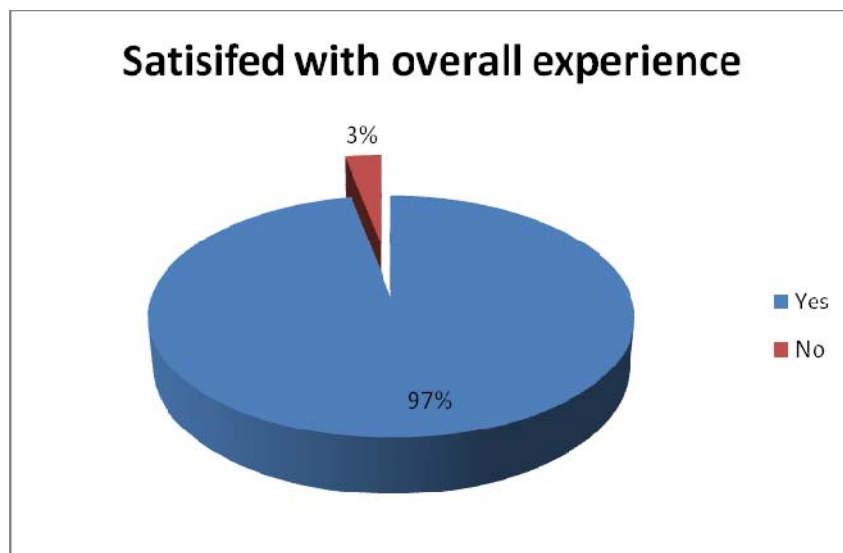


Figure 25. I Plan to Continue Buying at this Store (All)



Figure 26. I Recommend My Current Feed Store to Others (All)

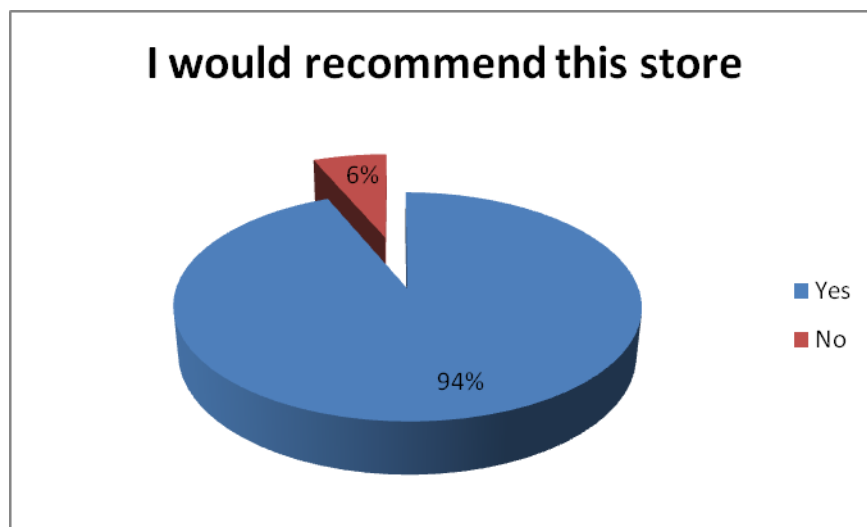


Figure 27. My Current Feed Store Communicates with Me Regularly via E-mail (All)

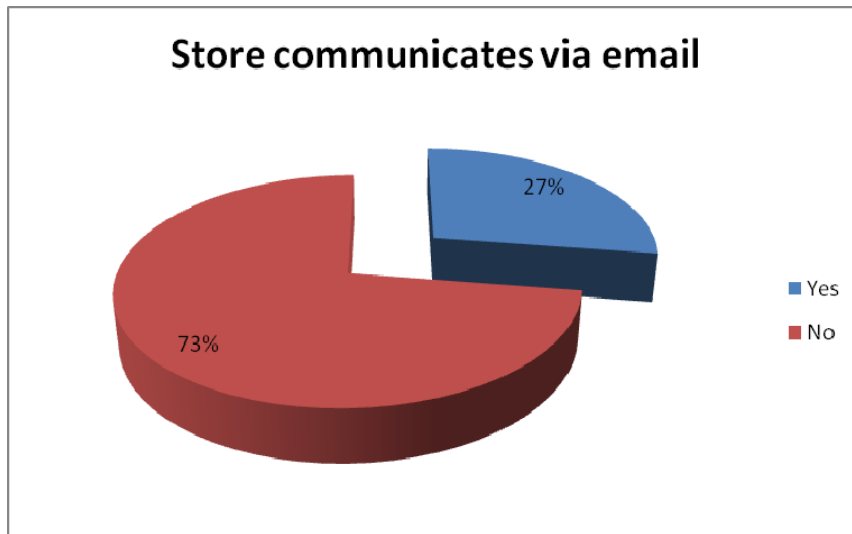


Figure 28. My Current Feed Store Does Not Have an E-zine, But I Would Sign-up if They did (All)

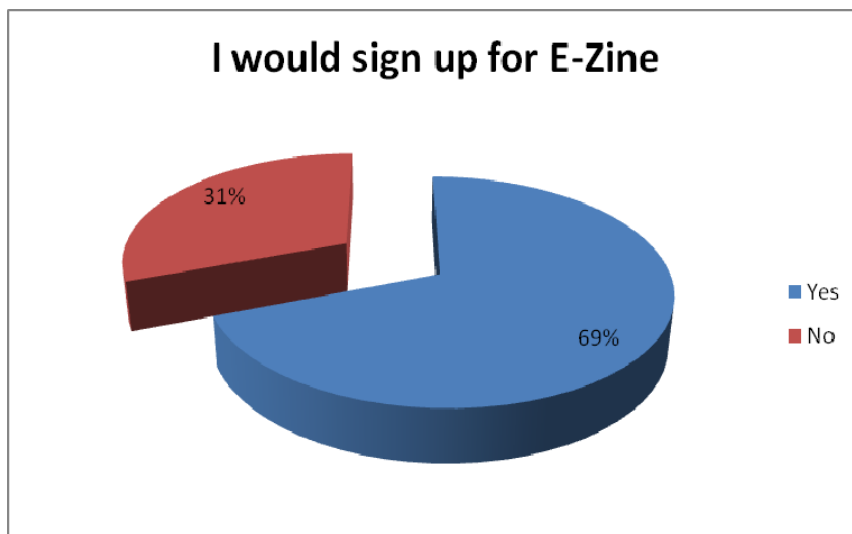
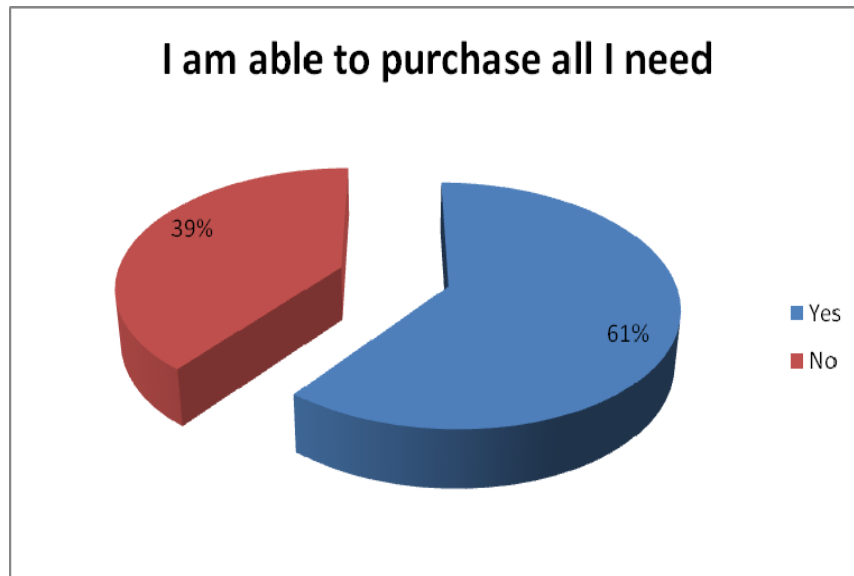


Figure 29. My Feed Store Meets My Product Needs (All)



Survey Results: Customers

Demographics

When Customer respondents are examined, the following general demographics and shopping habits are observed.

Figure 30. Gender of Respondents (Customers)

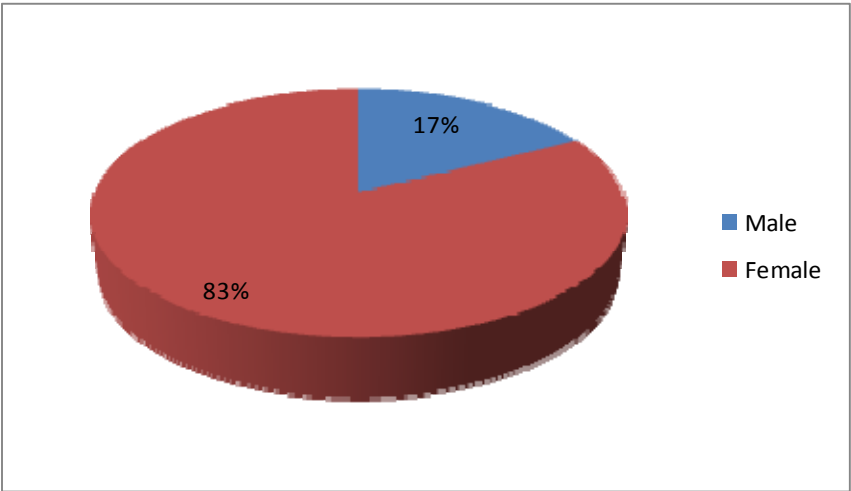


Figure 31. Age of Respondents (Customers)

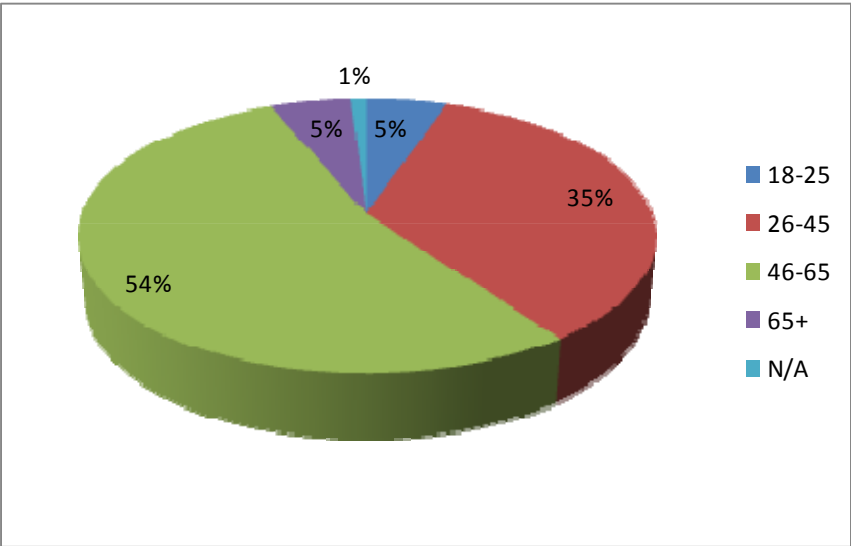


Figure 32. Education of Respondents (Customers)

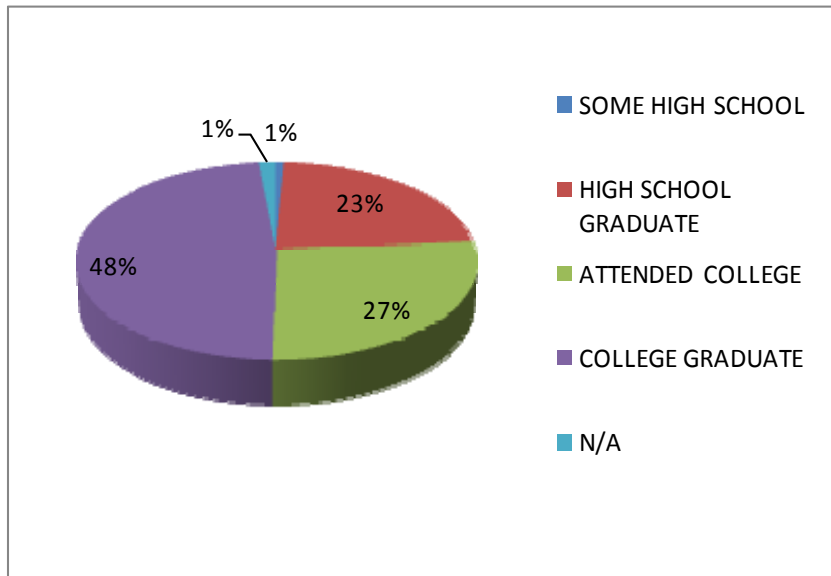


Figure 33. Annual Income of Respondents (Customers)

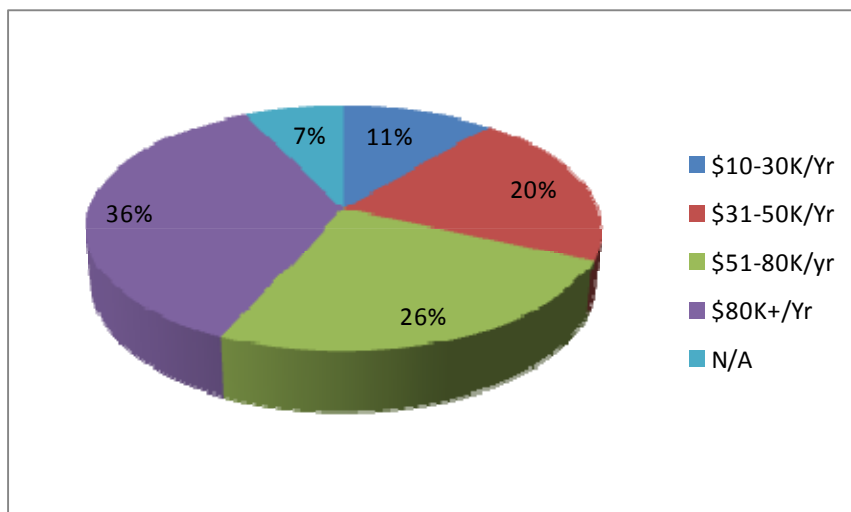
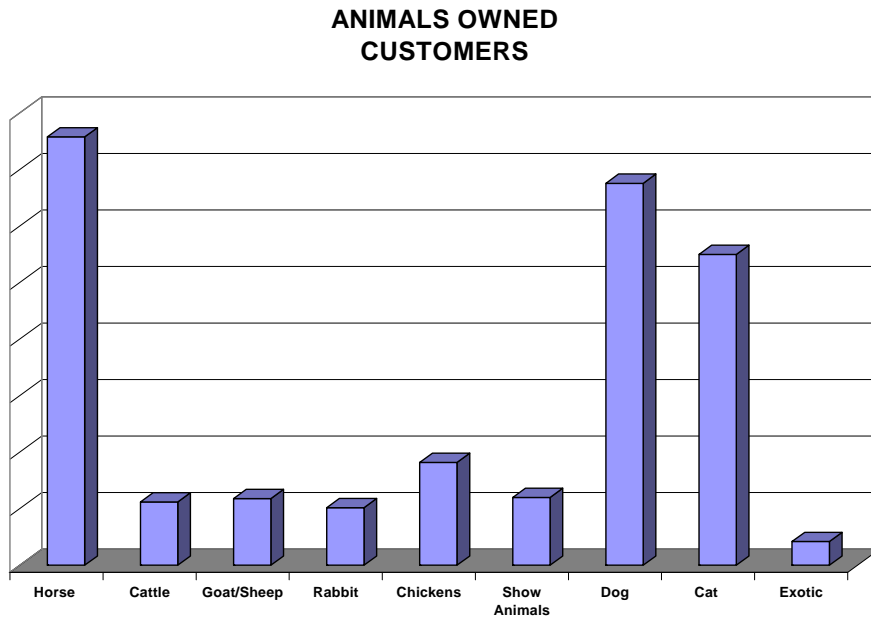


Figure 34. Animals Owned (Customers)



Shopping Habits

Figure 35. Shopping Frequency (Customers)

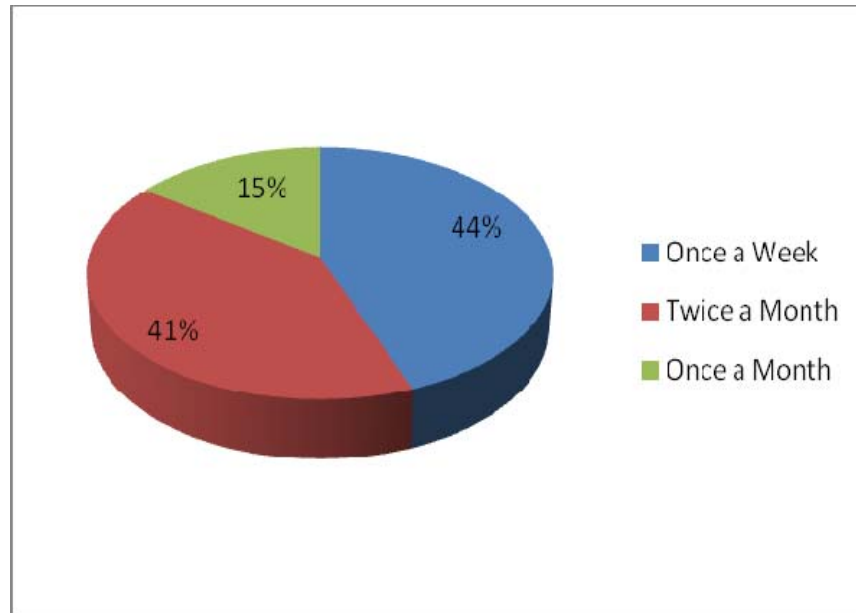
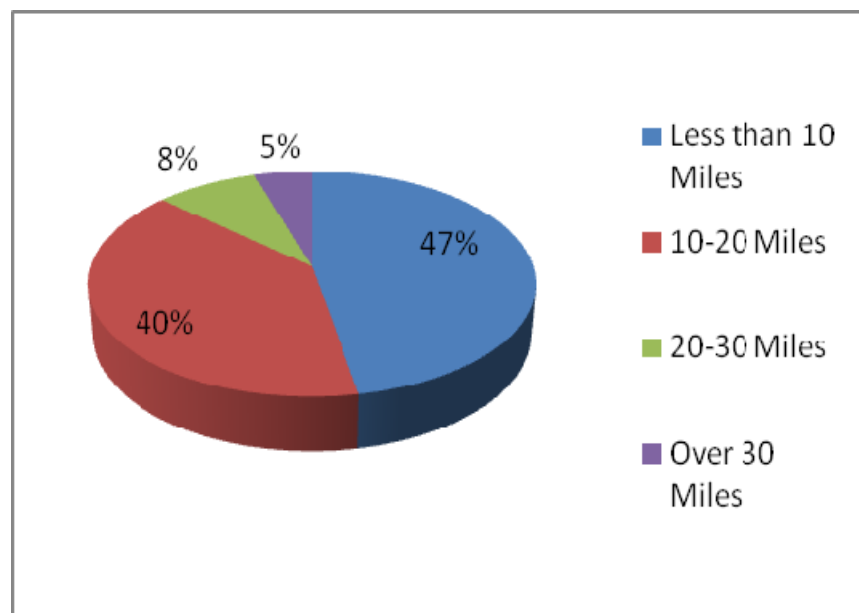


Figure 36. Driving Distance (Customers)



Elements of the Shopping Experience

Prices
Assortment of Products
Employee Product Knowledge
One Stop Shopping
Store Hours
Location
Cleanliness

Figure 37. Prices (Customers)

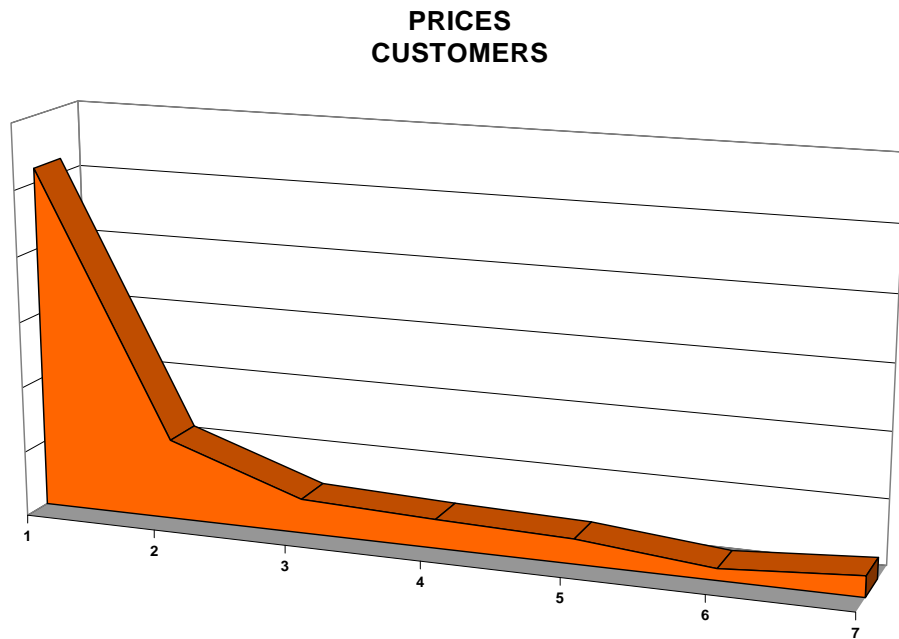


Figure 38. Assortment of Products (Customers)

**ASSORTMENT
CUSTOMERS**

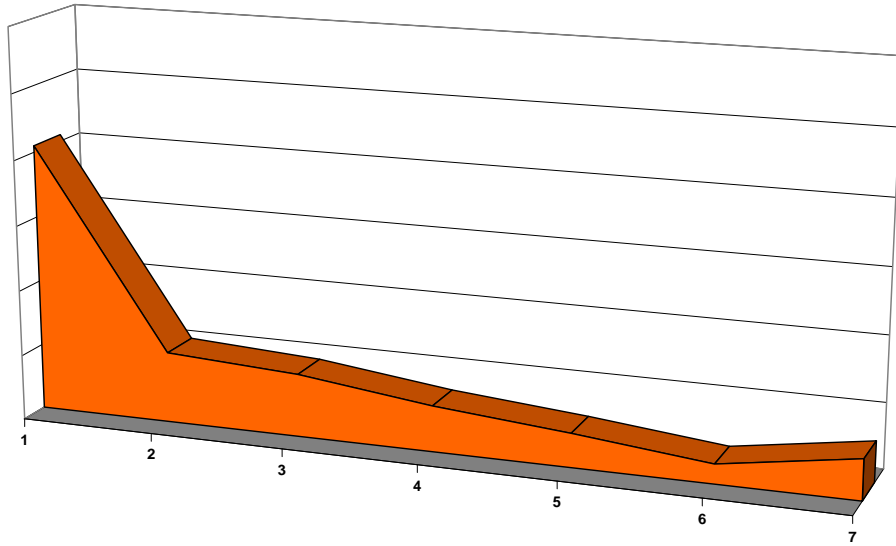


Figure 39. Employee Product Knowledge (Customers)

**KNOWLEDGEABLE EMPLOYEES
CUSTOMERS**

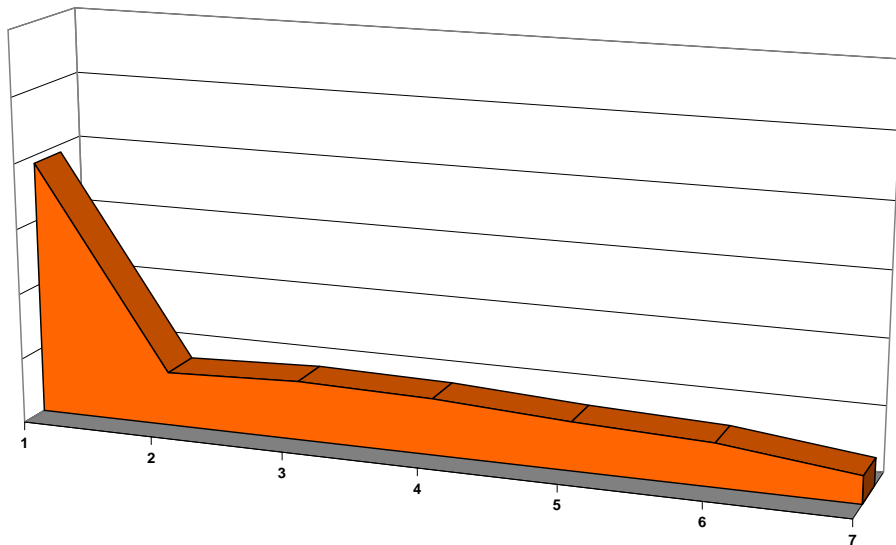


Figure 40. One Stop Shopping (Customers)

**ONE STOP SHOP
CUSTOEMRS**

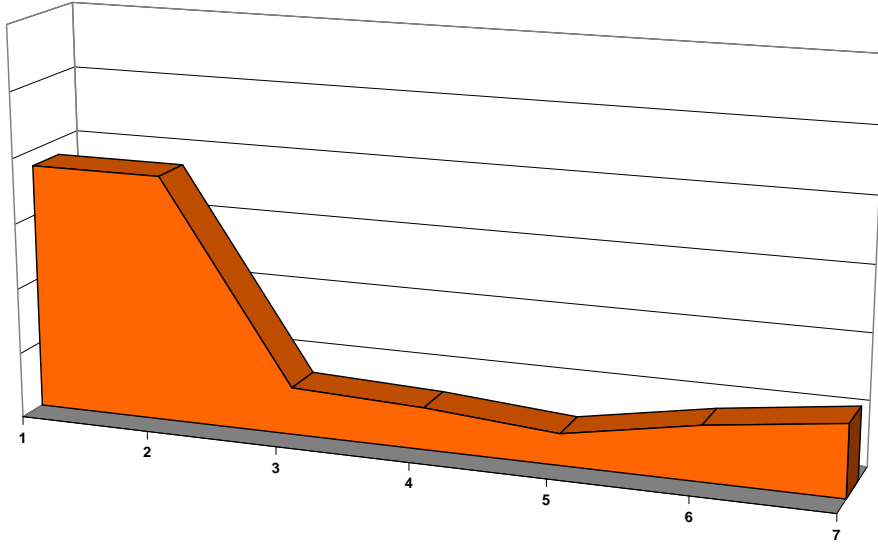


Figure 41. Convenience of Store Hours (Customers)

**STORE HOURS
CUSTOMERS**

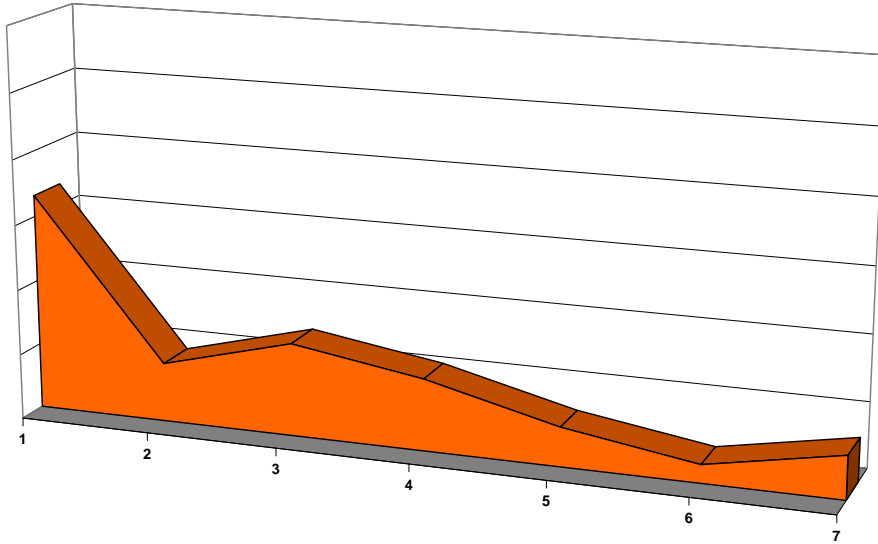


Figure 42. Location of Store (Customers)

**LOCATION
CUSTOMERS**

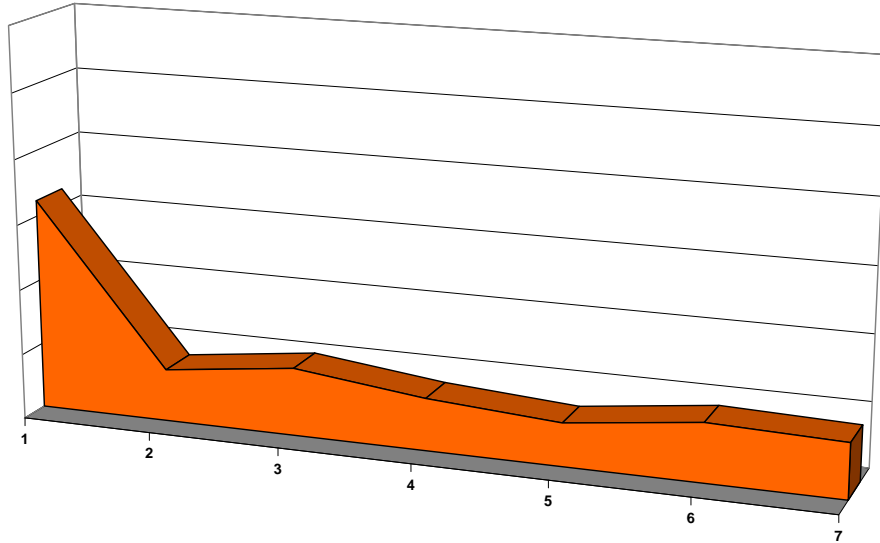
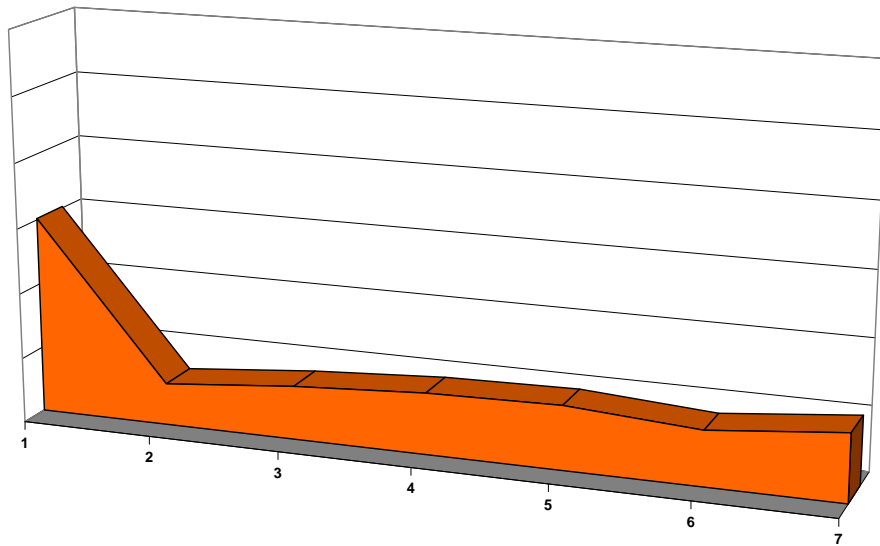


Figure 43. Cleanliness & Look of Store (Customers)

**CLEANLINESS
CUSTOMERS**



Evaluation of Current Feed Store

Helpful Employees
Knowledgeable Employees
Clean & Well Maintained
Well Lit
Products In Stock
Appealing Atmosphere
Good Selection
Competitive Prices
Impulse Buying

Figure 44. Employees were Helpful and Courteous (Customers)

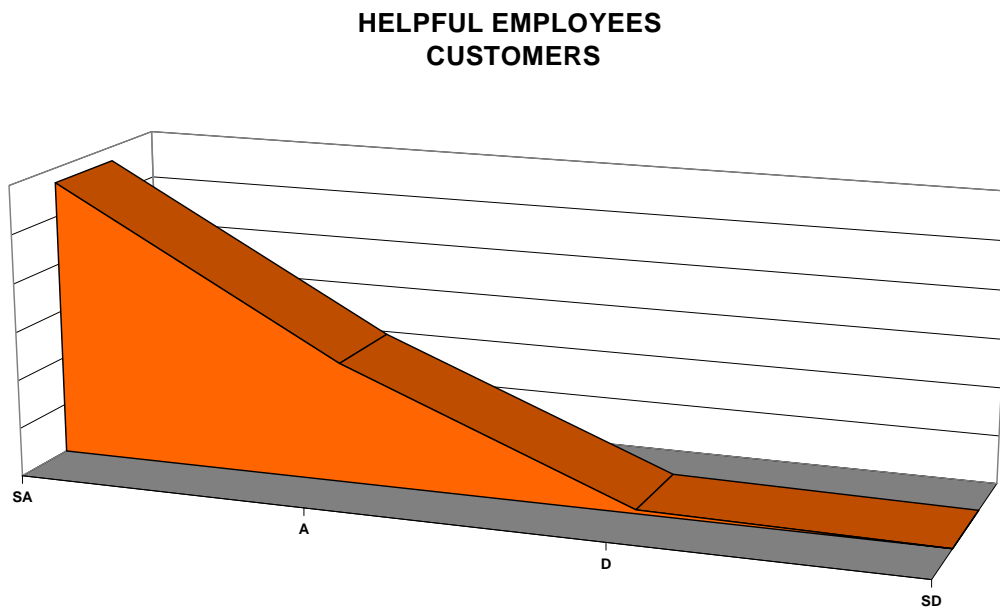


Figure 45. Employees were Knowledgeable About the Products (Customers)

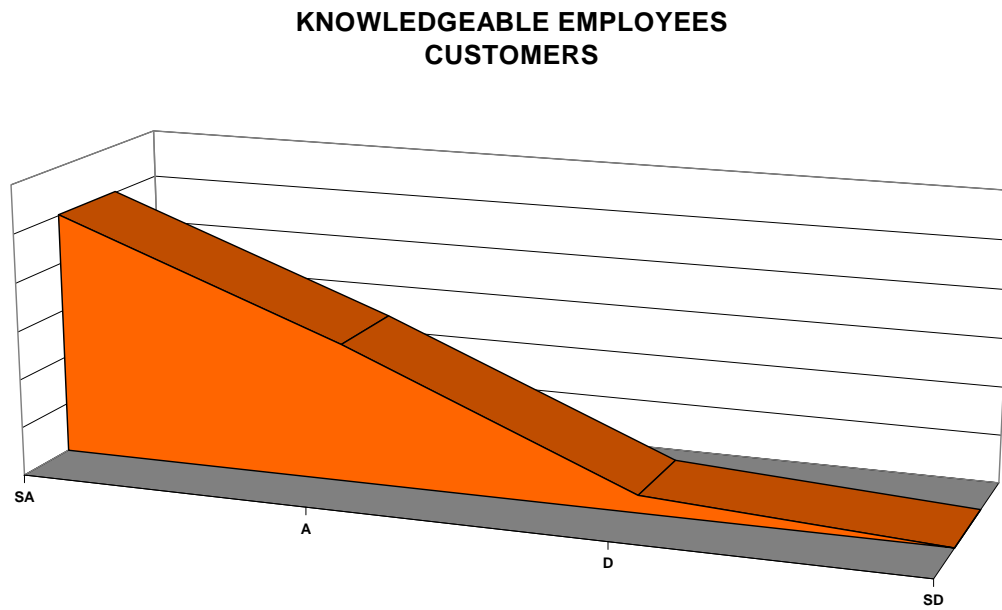


Figure 46. Store was Clean & Well Maintained (Customers)

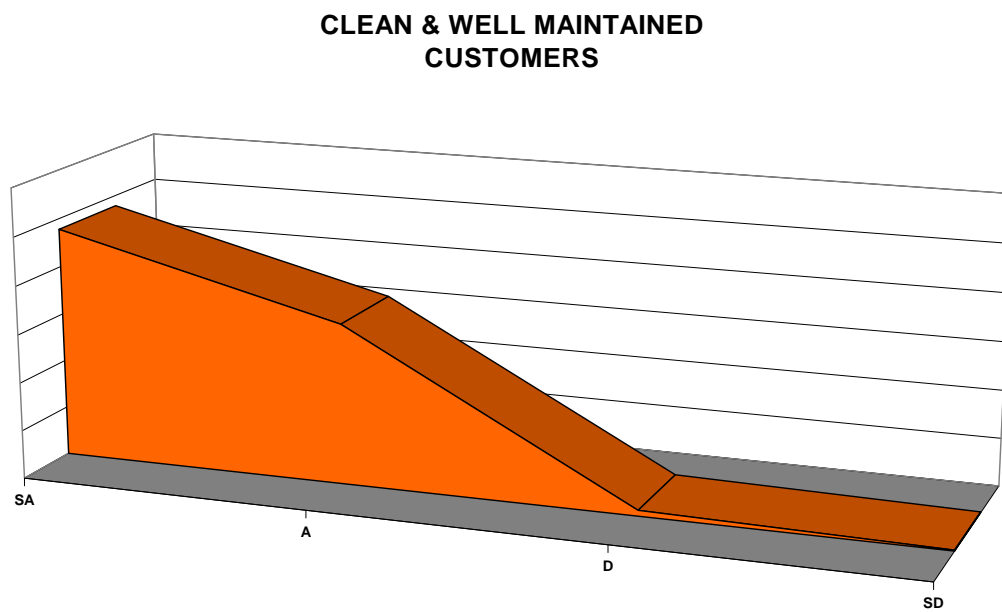


Figure 47. Store was Well Lit (Customers)

**WELL LIT
CUSTOMERS**

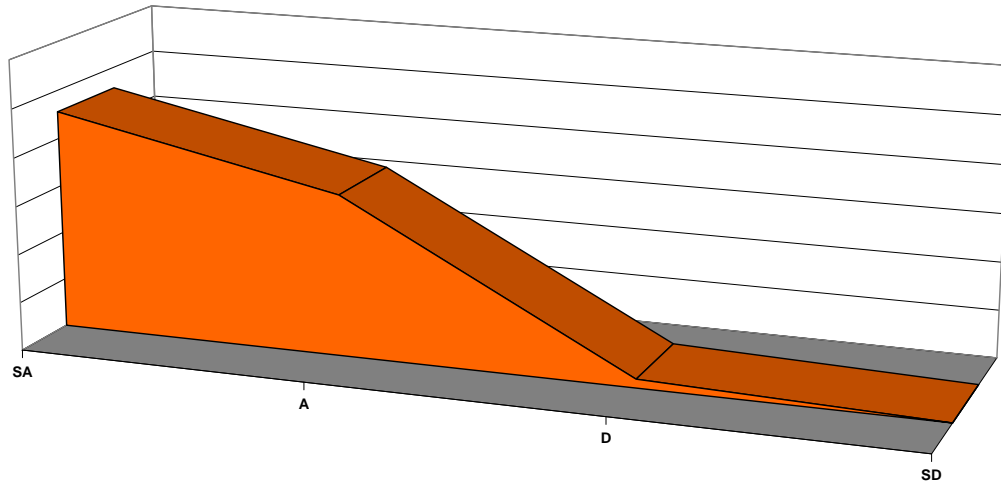


Figure 48. Products were in Stock (Customers)

**PRODUCTS IN STOCK
CUSTOMERS**

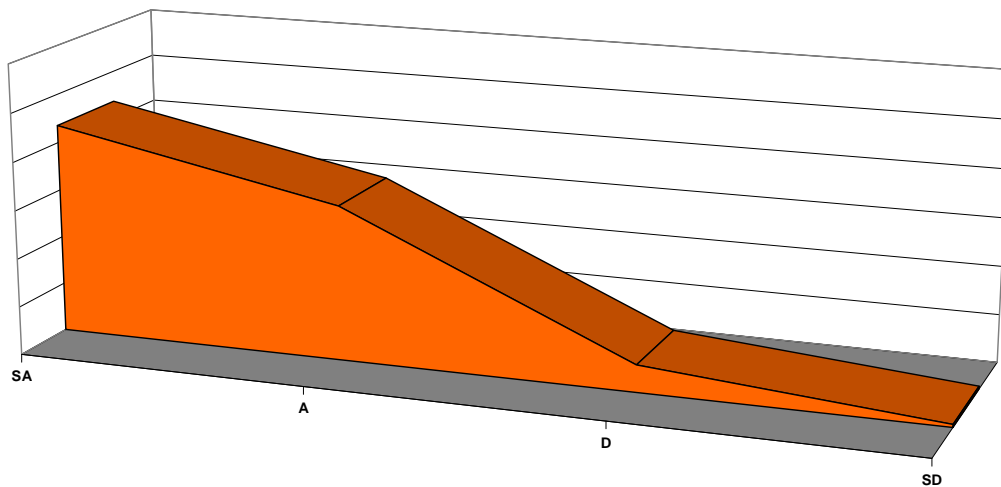


Figure 49. Store Atmosphere & Decor was Appealing (Customers)

**ATMOSPHERE APPEALING
CUSTOMERS**

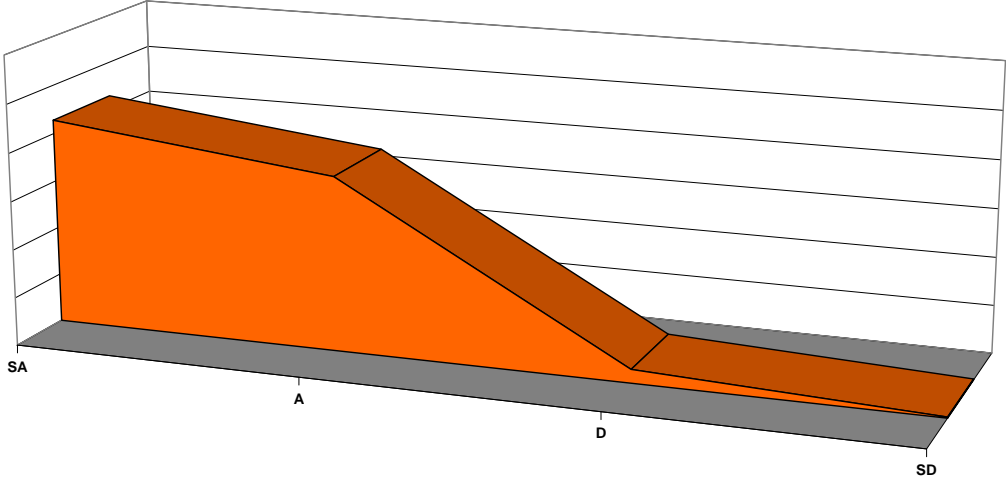


Figure 50. Store had a Good Selection of Products (Customers)

**GOOD SELECTION
CUSTOMERS**

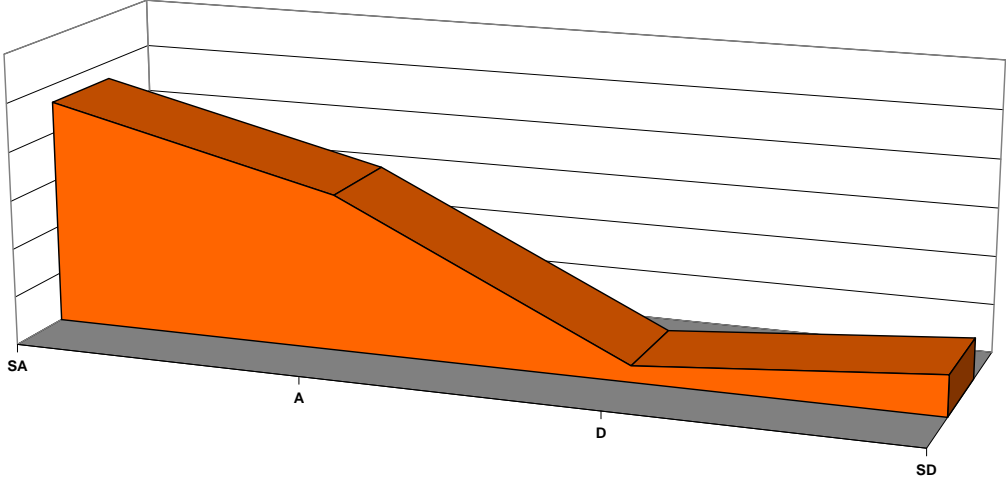


Figure 51. Prices were Competitive with Other Stores (Customers)

**PRICES COMPETITIVE
CUSTOMERS**

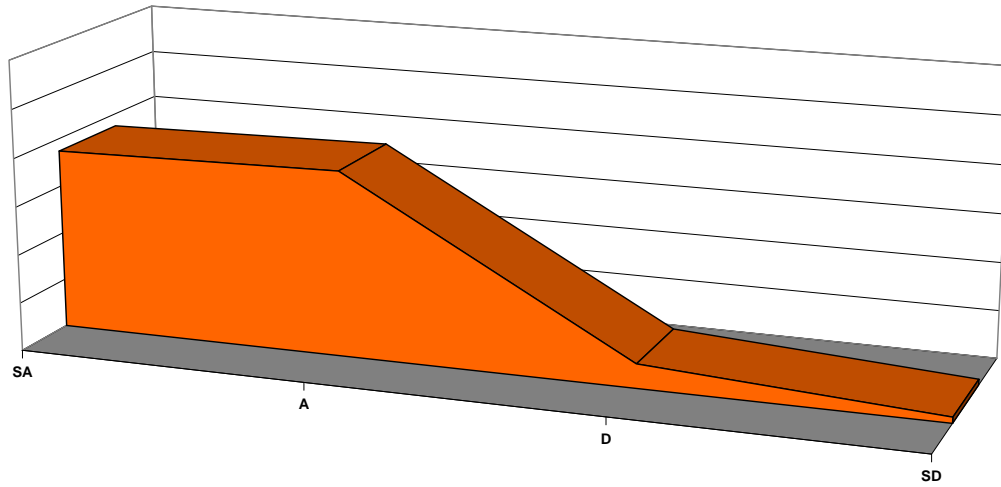
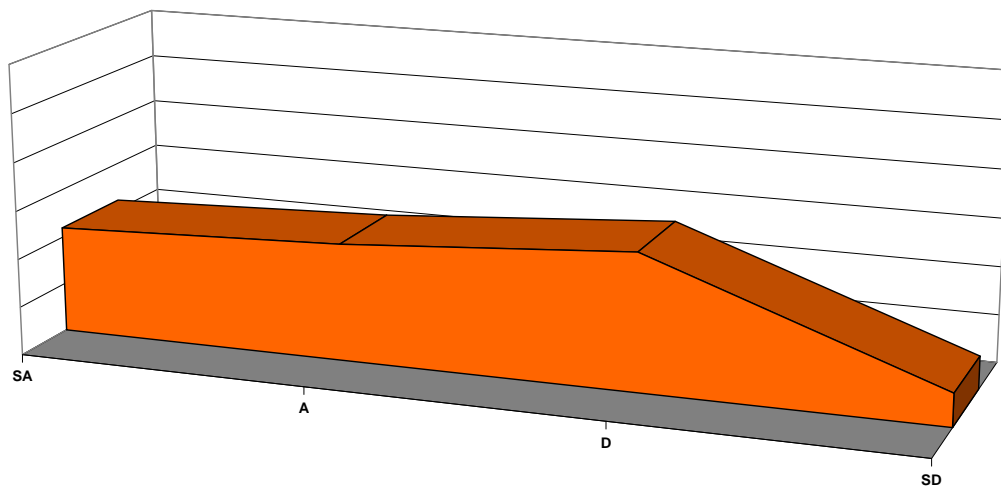


Figure 52. Impulse Buying (Customers)

**IMPULSE PURCHASE
CUSTOMER**



Future Interaction with Current Feed Retailer

Figure 53. I am Satisfied with My Overall Experience at this Store (Customers)



Figure 54. I Plan to Continue Buying at this Store (Customers)

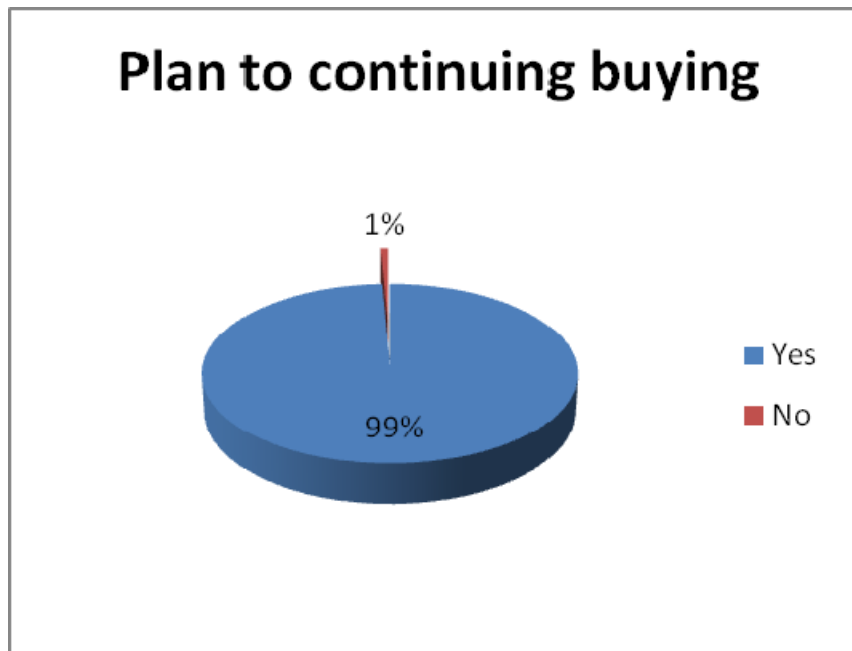


Figure 55. I Recommend My Current Feed Store to Others (Customers)



Figure 56. My Current Feed Store Communicates with Me Regularly via E-mail (Customers)



Figure 57. My Current Feed Store Does Not Have an E-zine, But I Would Sign-up if They did (Customers)

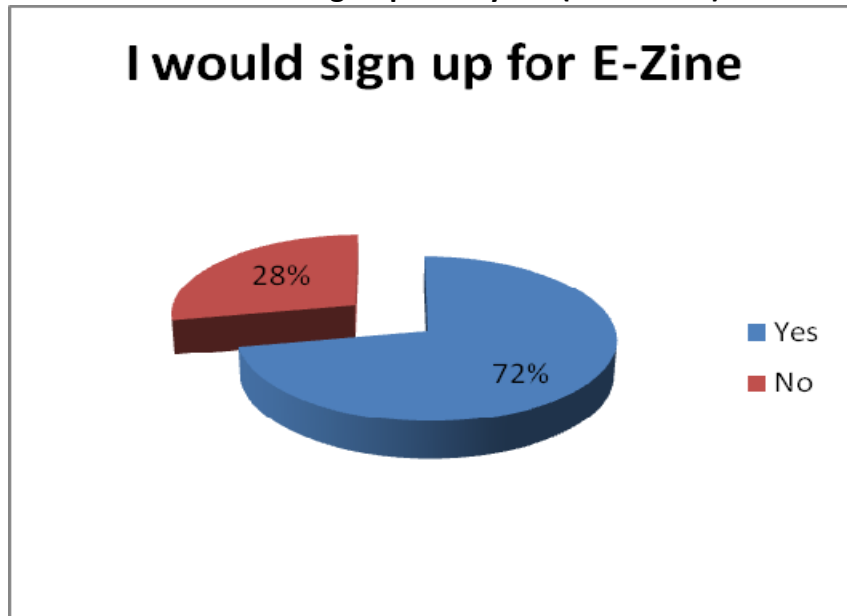


Figure 58. My Feed Store Meets My Product Needs (Customers)

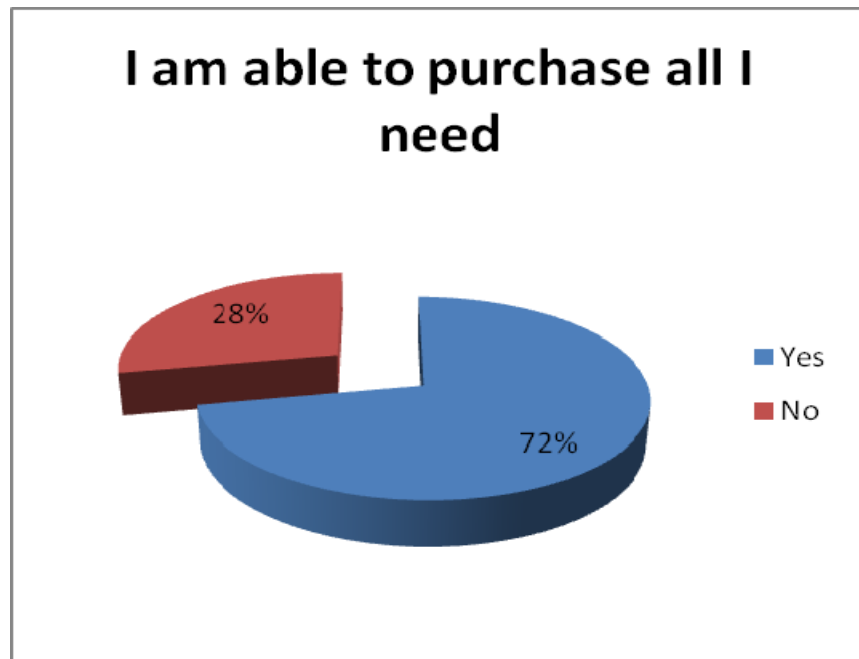


Figure 59. Intentionally Left Blank

Survey Results: Prospects

Demographics

When Prospect respondents are examined, the following general demographics and shopping habits are observed.

Figure 60. Gender of Respondents (Prospects)

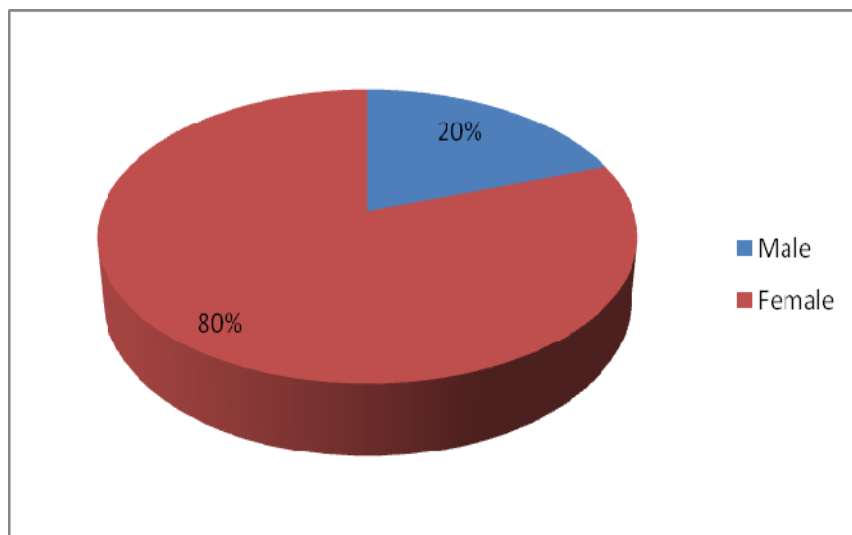


Figure 61. Age of Respondents (Prospects)

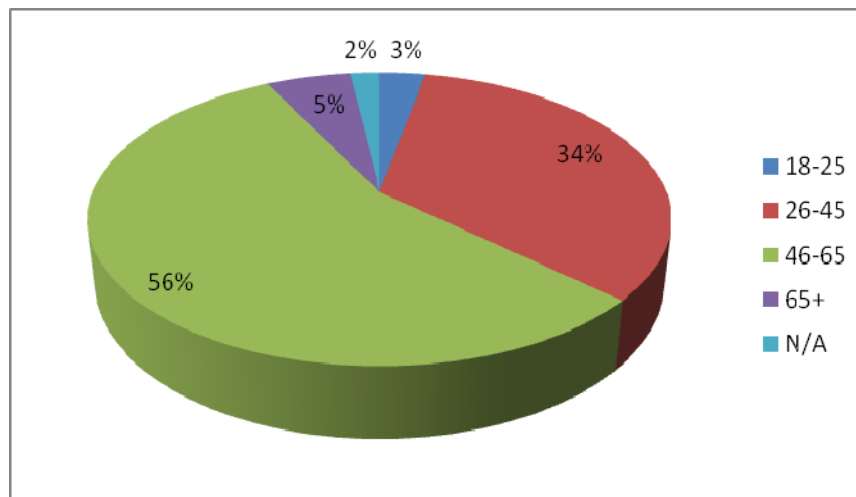


Figure 62. Education of Respondents (Prospects)

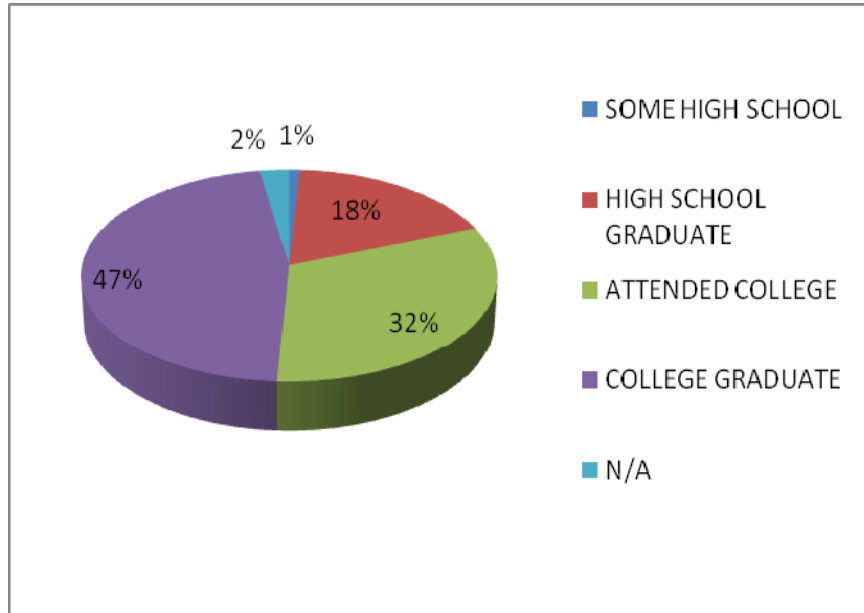


Figure 63. Annual Income of Respondents (Prospects)

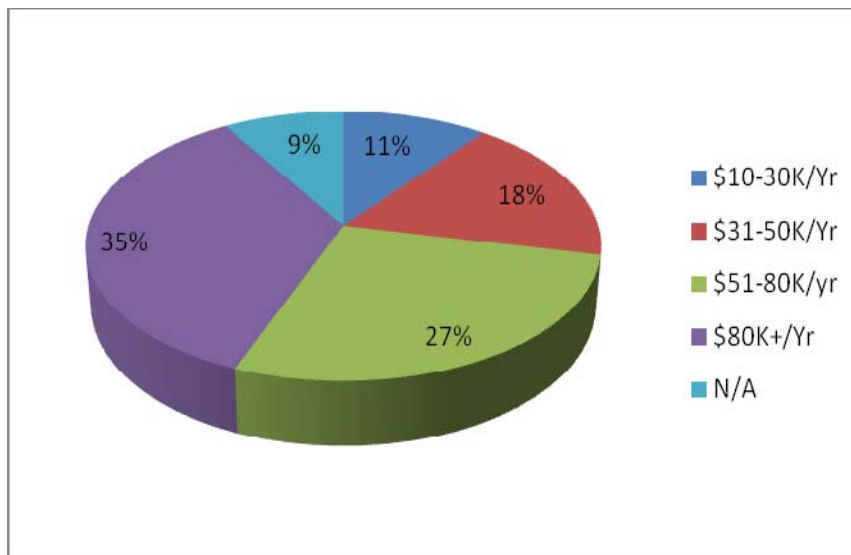
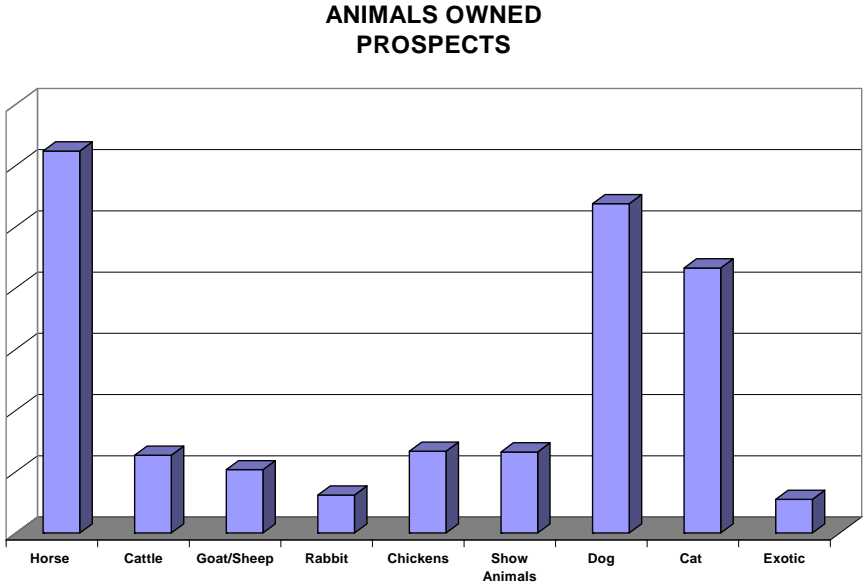


Figure 64. Animals Owned (Prospects)



Shopping Habits

Figure 65. Shopping Frequency (Prospects)

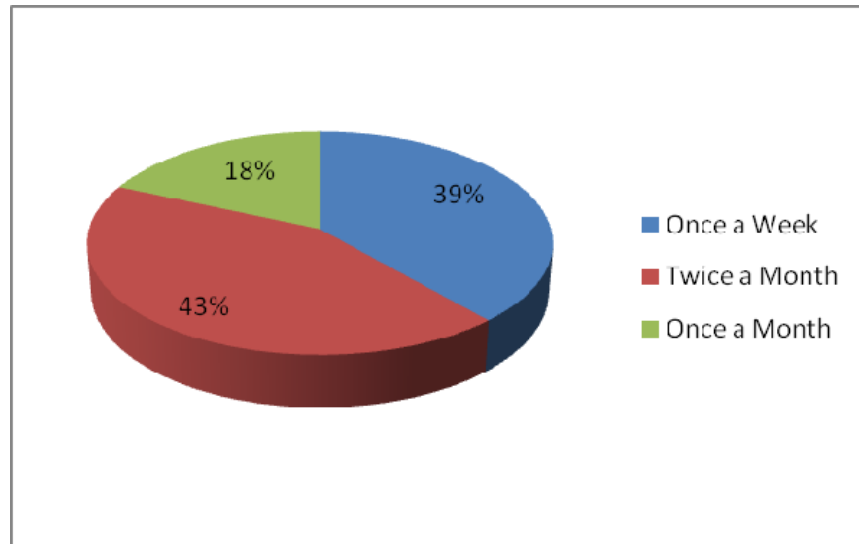
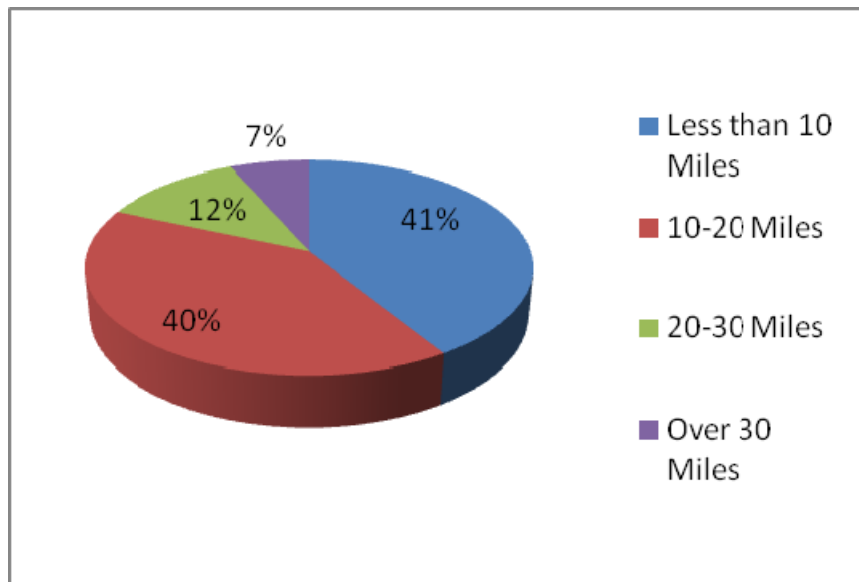


Figure 66. Driving Distance (Prospects)



Elements of the Shopping Experience

Prices
Assortment of Products
Employee Product Knowledge
One Stop Shopping
Store Hours
Location
Cleanliness

Figure 67. Prices (Prospects)

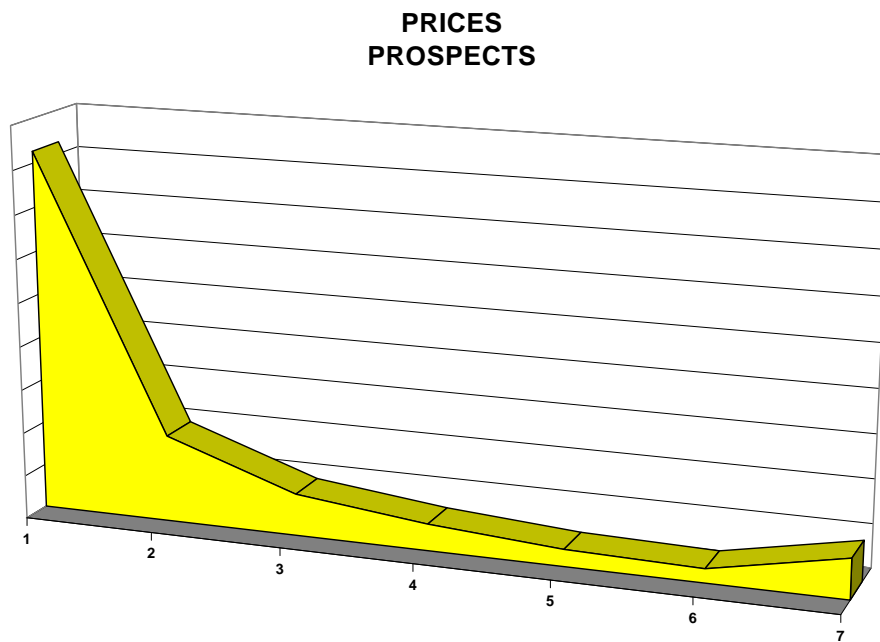


Figure 68. Assortment of Products (Prospects)

**ASSORTMENT OF PRODUCTS
PROSPECTS**

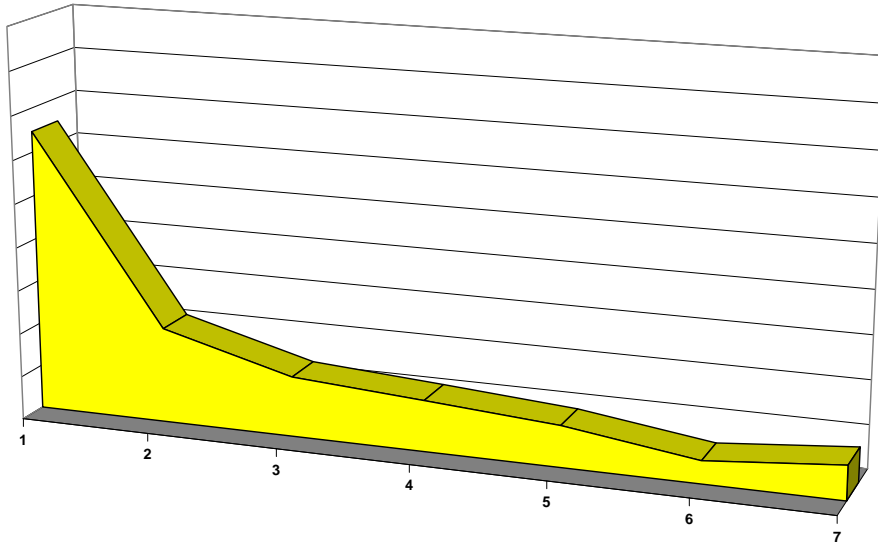


Figure 69. Employee Product Knowledge (Prospects)

**KNOWLEDGEABLE EMPLOYEES
PROSPECTS**

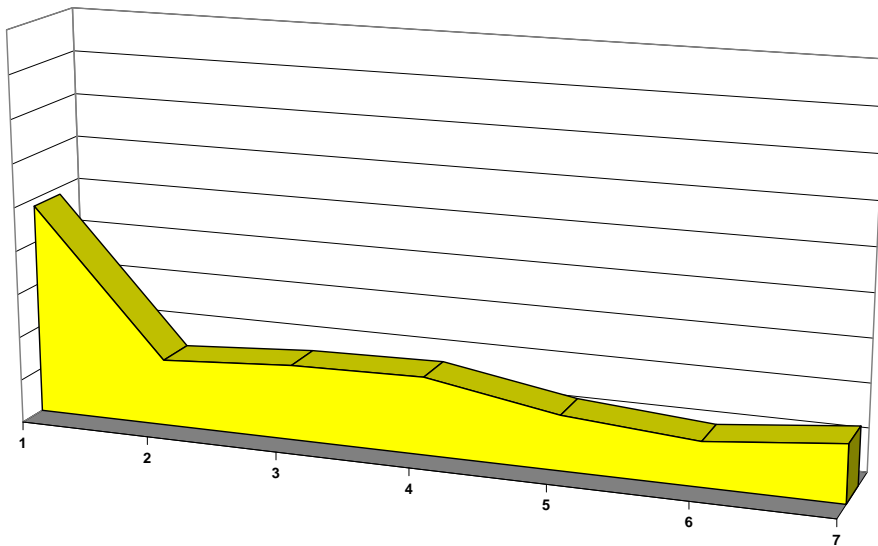


Figure 70. One Stop Shopping (Prospects)

**ONE STOP SHOP
PROSPECTS**

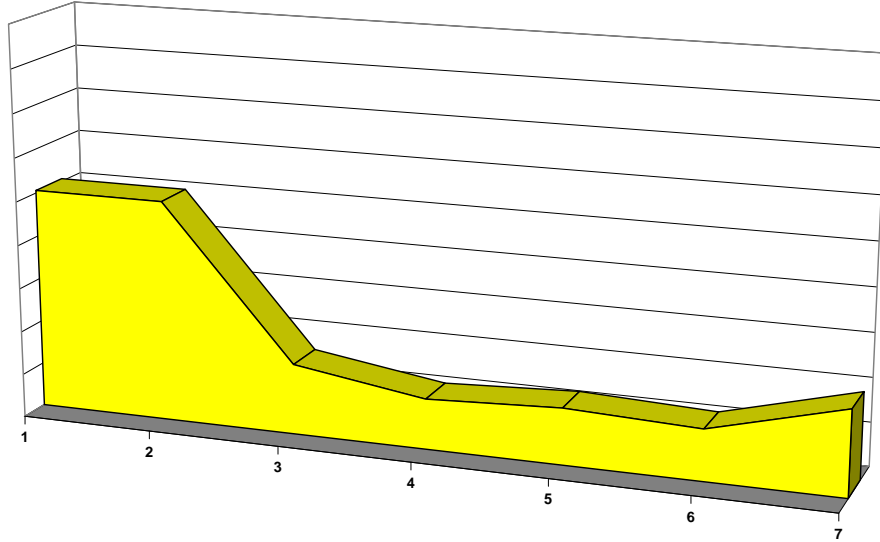


Figure 71. Convenience of Store Hours (Prospects)

**STORE HOURS
PROSPECTS**

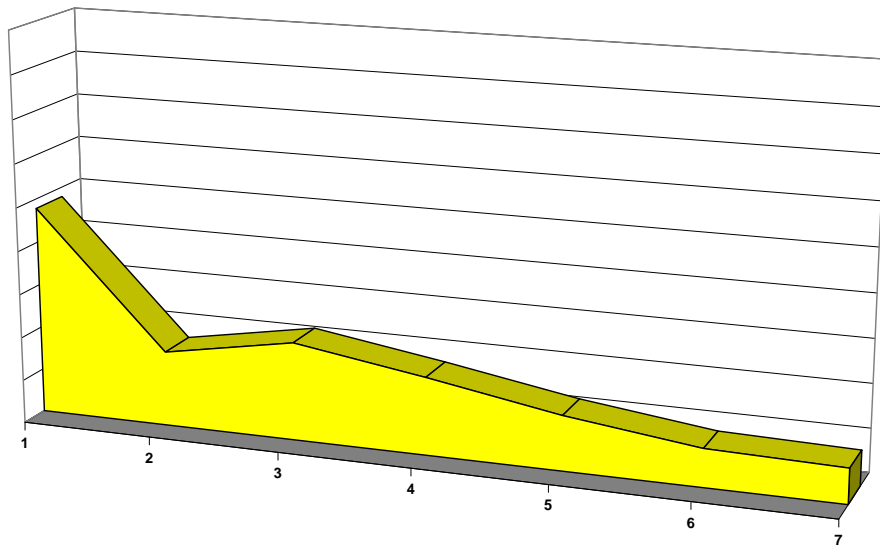


Figure 72. Location of Store (Prospects)

**LOCATION
PROSPECTS**

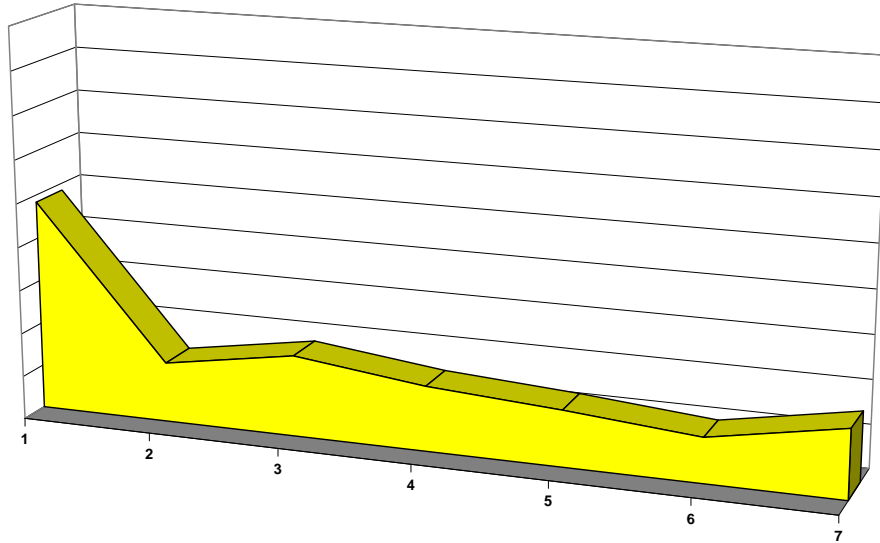
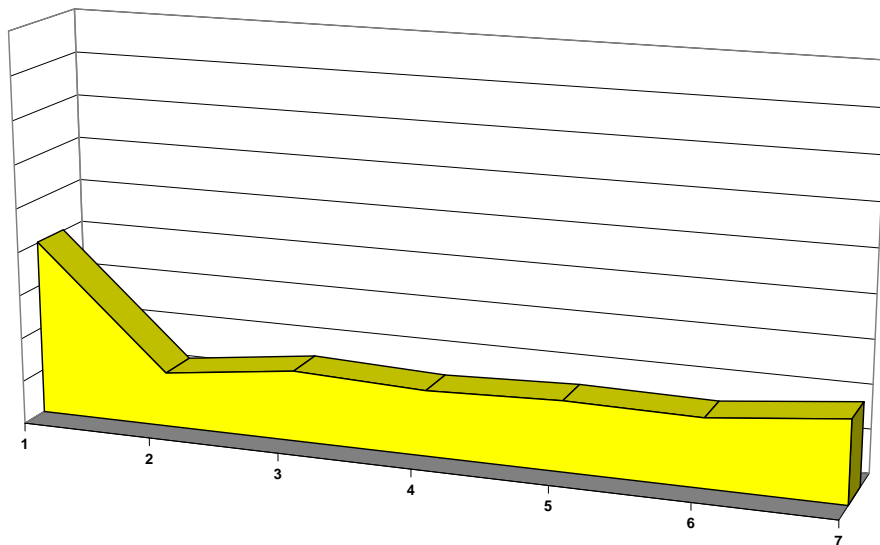


Figure 73. Cleanliness & Look of Store (Prospects)

**CLEANINESS
PROSPECTS**



Evaluation of Current Feed Store

Helpful Employees
Knowledgeable Employees
Clean & Well Maintained
Well Lit
Products In Stock
Appealing Atmosphere
Good Selection
Competitive Prices
Impulse Buying

Figure 74. Employees were Helpful and Courteous (Prospects)

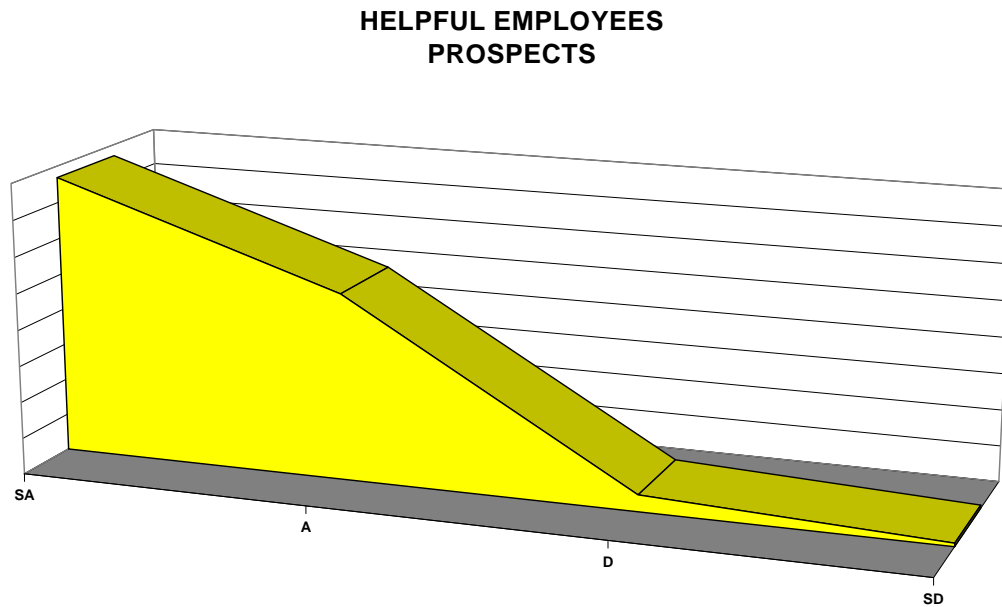


Figure 75. Employees were Knowledgeable About the Products (Prospects)

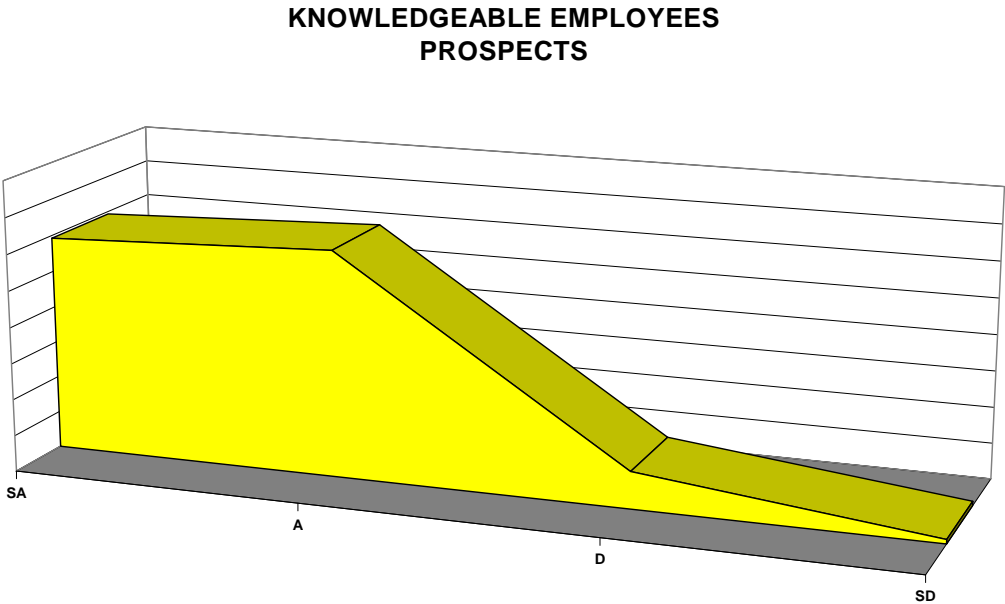


Figure 76. Store was Clean & Well Maintained (Prospects)

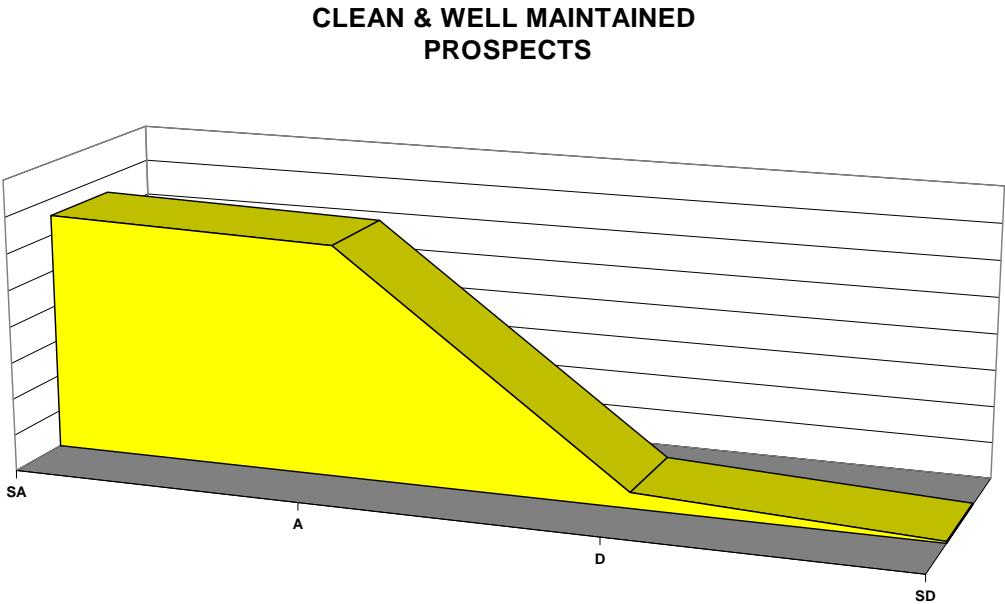


Figure 77. Store was Well Lit (Prospects)

**WELL LIT
PROSPECTS**

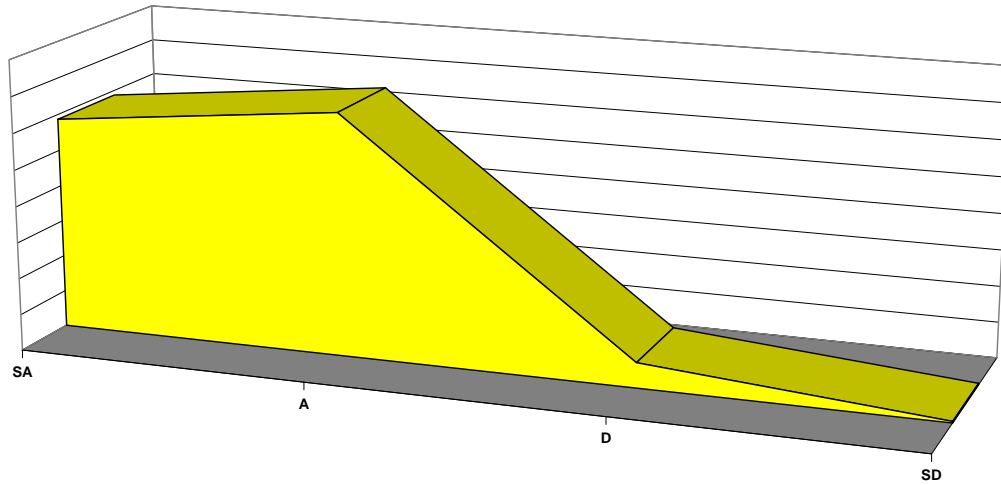


Figure 78. Products were in Stock (Prospects)

**PRODUCTS IN STOCK
PROSPECTS**

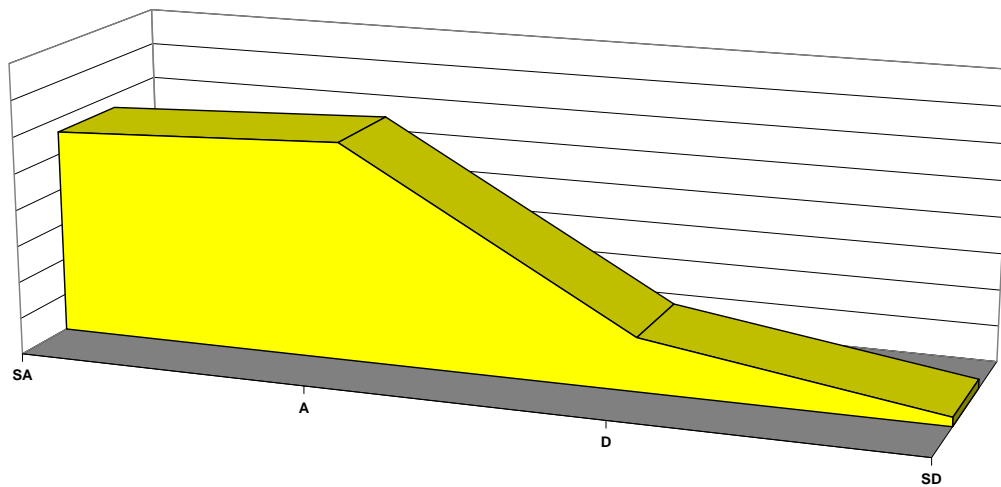


Figure 79. Store Atmosphere & Décor was Appealing (Prospects)

**ATMOSPHERE APPEALING
PROSPECTS**

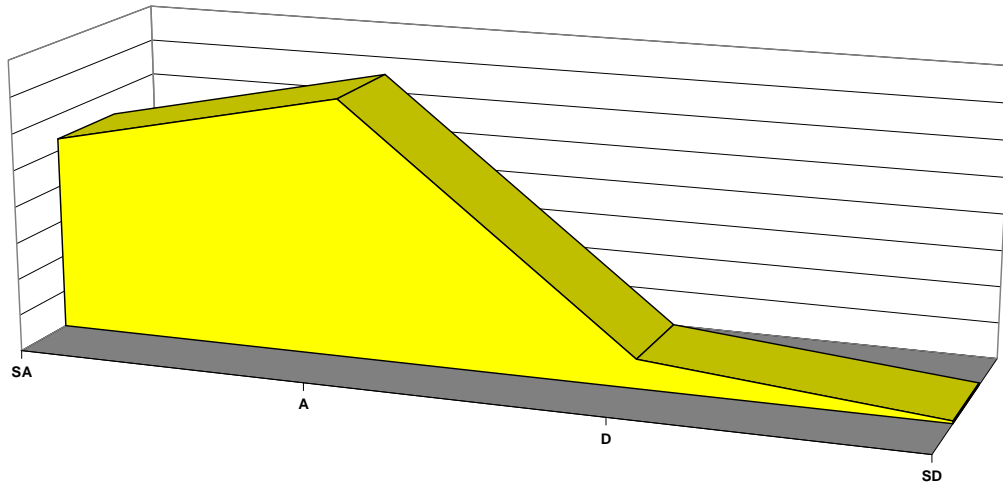


Figure 80. Store had a Good Selection of Products (Prospects)

**GOOD SELECTION
PROSPECTS**

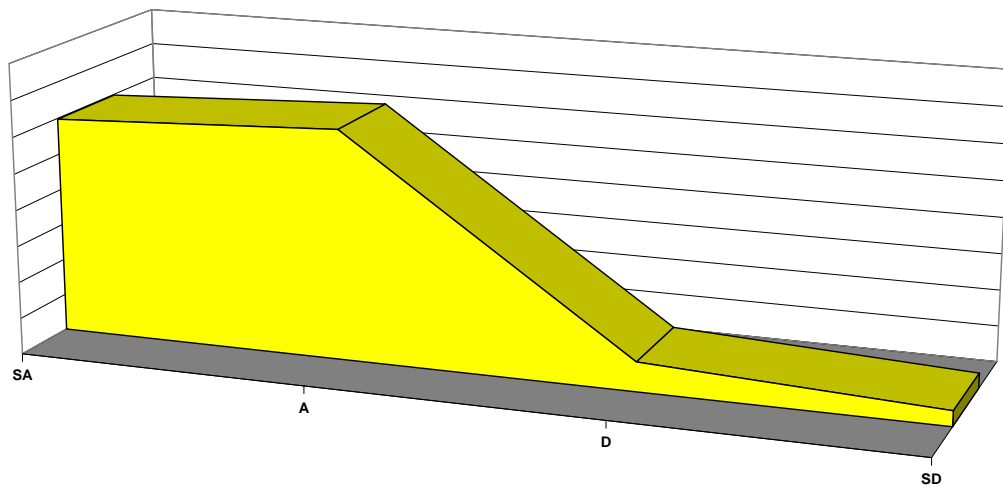


Figure 81. Prices were Competitive with Other Stores (Prospects)

**PRICES COMPETITIVE
PROSPECTS**

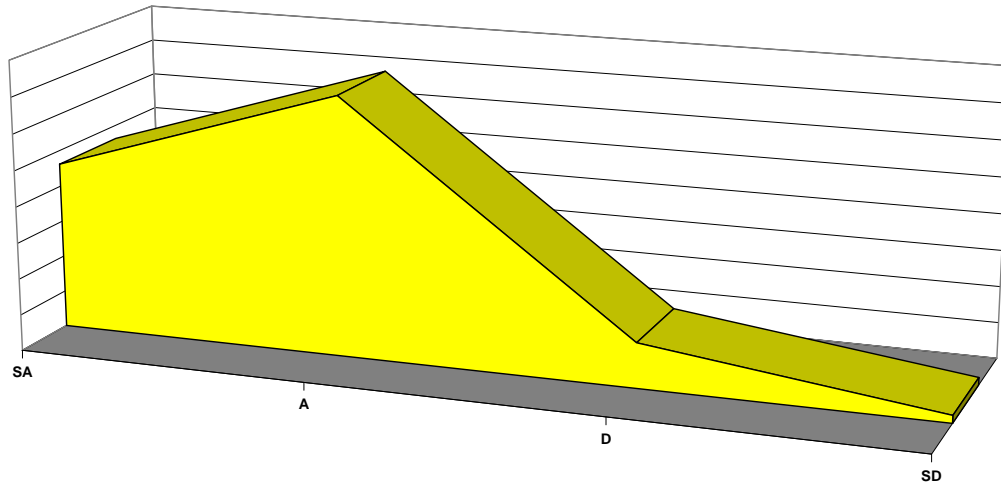
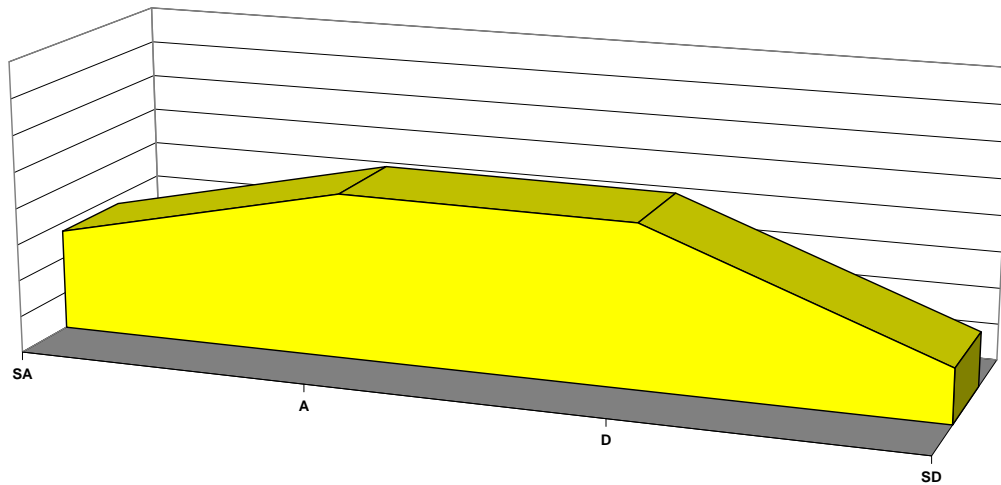


Figure 82. Impulse Buying (Prospects)

**IMPULSE PURCHASE
PROSPECTS**



Future Interaction with Current Feed Retailer

Figure 83. I am Satisfied with My Overall Experience at this Store (Prospects)

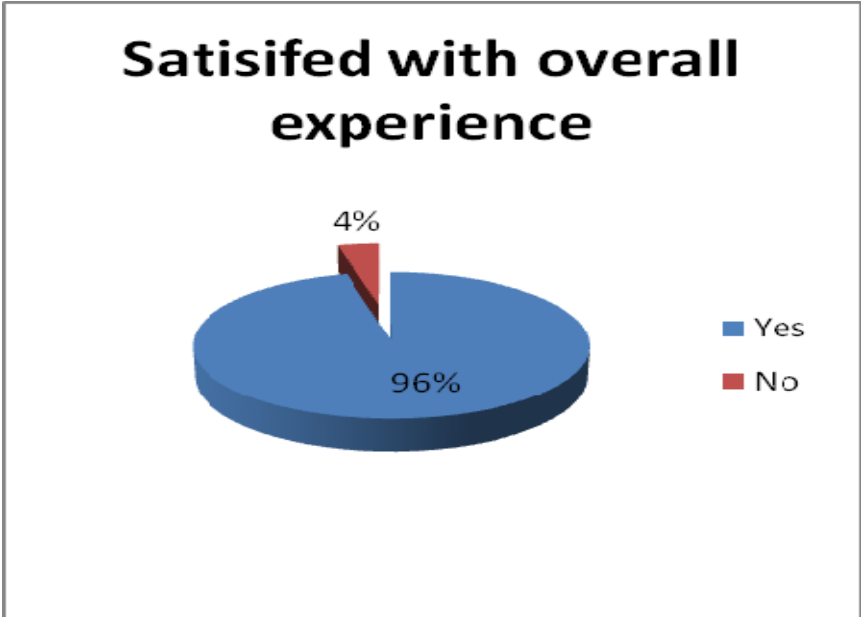


Figure 84. I Plan to Continue Buying at this Store (Prospects)



Figure 85. I Recommend My Current Feed Store to Others (Prospects)



Figure 86. My Current Feed Store Communicates with Me Regularly via E-mail (Prospects)



Figure 87. My Current Store Does Not Have an E-zine, But I Would Sign-up if They did (Prospects)

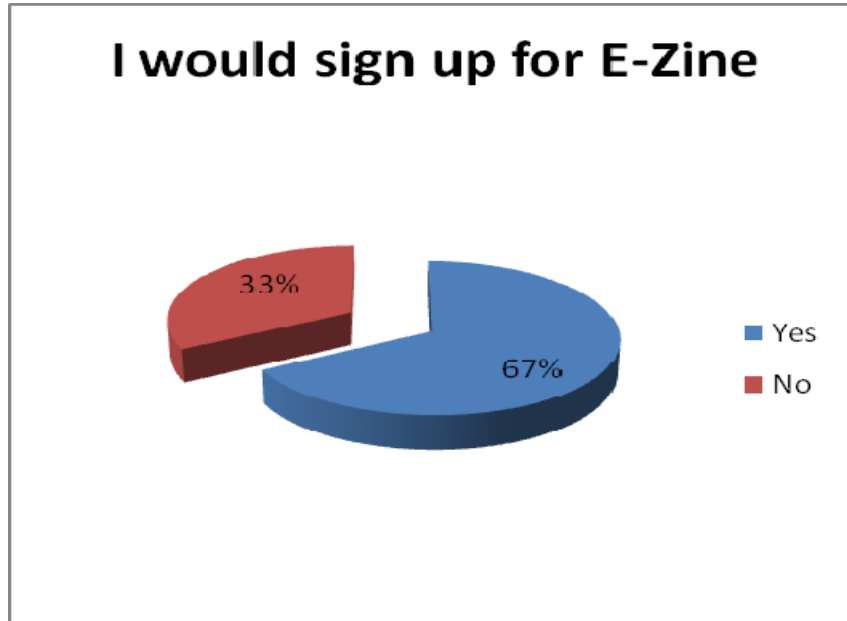


Figure 88. My Feed Store Meets My Product Needs (Prospects)



Appendix



To obtain your coupon, please take part in our survey. Please complete the form below.

Good only in the U.S.A. Void where prohibited. **LIMIT ONE PER INDIVIDUAL HOUSEHOLD OR E-MAIL ADDRESS.** Coupon may not be copied or transferred. Reproduction of this coupon is expressly prohibited and constitutes fraud. Limited time offer. Good while supplies last. Offer valid only at participating dealers. Offer valid only on products greater than \$8.00 retail price.

What Animals do you own/feed? Check all that apply

- Horse
- Cattle
- Goat/Sheep
- Rabbit
- Chickens
- Show Animals
- Dog
- Cat
- Exotic

About how often do you visit your feed store

- Once a week
- Twice a month
- Once a month

How far do you drive to your feed store

- Less than 10 miles
- 10-20 miles
- 20-30 miles
- Over 30 miles

How important are each of the following (please rank then 1-7, with 1 being the most important)

- 1 Assortment of feeds/products offered
- 1 Prices
- 1 Convenience of store and hours of operation
- 1 Knowledge of store staff
- 1 Cleanliness and look of store
- 1 One stop shop for all my animal's needs
- 1 Location of store

Rate your overall shopping experience at your current feed store

	Strongly Agree	Agree	Disagree	Strongly Disagree
Store was clean and well maintained	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Store atmosphere and decor was appealing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Store was well lit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees were knowledgeable about the products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees were helpful and courteous	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Store had a good selection of product	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Products you were looking for were in stock	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prices were competitive with other stores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I purchased something that I did not plan on buying while I was there	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please answer YES or NO to the following

	Yes	No
I was satisfied with my shopping experience at my feed store	<input type="radio"/>	<input type="radio"/>
I plan on continuing to give my business to this store	<input type="radio"/>	<input type="radio"/>
I recommend my current feed store to others looking for a place to buy	<input type="radio"/>	<input type="radio"/>
My current feed store has a mailing list and communicates with me regularly	<input type="radio"/>	<input type="radio"/>
My current feed store does not have a mailing list, but I would sign up to be on their mailing list if they had one	<input type="radio"/>	<input type="radio"/>
My current feed store does not have a mailing list, but I would not sign up to be on their mailing list if they had one	<input type="radio"/>	<input type="radio"/>
I am able to purchase all products my animals need at my current feed store	<input type="radio"/>	<input type="radio"/>

What is the one thing your current feed store could/should do to improve

What products/product lines do you wish your feed store would carry that they current do not?

What is anything would cause you to switch feed stores?

Demographic Information:

Sex: Male Female

Age

Household Income

Education

Please click the submit button to receive a \$8.00 coupon on any Purina Mills feed.
Please only click once.