USA
WILD BIRD FEEDING INDUSTRY
YEARLY RESEARCH 2015

By Ask Your Target Market - AYTM.com
PAST RESEARCH
RESEARCH METHODOLOGY AND PAST KNOWLEDGE
2013
Wave I
benchmark study
18+ y.o.
USA & CA
N = 3200
Balanced by region

2014
Wave II
yearly tracking study
18+ y.o.
USA & CA
N = 3200
Balanced by region

2015
Wave III
yearly tracking study
18+ y.o.
USA only
Balanced by region
DISCLAIMER APPROXIMATION

PURCHASE VOLUMES, PREFERENCES AND DERIVED MARKET SIZE ARE BASED ON CONSUMERS’ MEMORY OF THEIR PURCHASES WITHIN LAST YEAR.
KEY FINDINGS
MARKET SIZE
USA

125 MM
ESTIMATED NUMBER OF HOUSEHOLDS IN 2014

52.5 MM (42.1%)
OF HOUSEHOLDS BUY WILD BIRD FEED AT LEAST SOMETIMES

$59.73 - AVERAGE ANNUAL SPEND ON WILD BIRDS FEED

$37.88 - AVERAGE ANNUAL SPEND ON WILD BIRDS FEEDERS

🏠 = 1,000,000 HOUSEHOLDS
MARKET SIZE BY US REGIONS

- West: 38.2%
- South: 42.3%
- Midwest: 43.4%
- Northeast: 44.9%

Feeders and Feed prices by region:
- Northeast: Feed $67.93, Feeders $35.50
- Midwest: Feed $56.39, Feeders $37.69
- South: Feed $57.89, Feeders $39.52
- West: Feed $59.32, Feeders $37.03
GROWTH

THE RATE OF BIRD FEEDING IN US HOUSEHOLDS HAS GROWN CONSISTENTLY IN US HOUSEHOLDS SINCE 2013.
ADDITIONAL MARKET FINDINGS

- **About 4 in 10 shoppers** buy **Wild Bird Feed** at least sometimes.
- **56%** of feed purchasers buy at least every 6 months.
- The average purchaser spends an average of **$24** per shopping trip, and **$60** per year.
- Expectations are that **the market is growing**. Nearly one-third of purchasers expect to spend more this year on **Wild Bird Feed and Feeders**, and more than half will maintain their spending level.
- **More than 90%** of wild bird feed purchasers buy **Feeders** at some point, but fewer than half of those purchase at least once a year. On average, bird feed purchasers say they spend about **$38** per year on feeders.
3

BIRD FEED SHOPPING HABITS
& PREFERENCES
How frequently do they buy feed?

- Once a month or more often: 19%
- Once every 2-3 months: 21%
- Once every 4-6 months: 14%
- Once every 6-12 months: 17%
- Less than once a year: 29%

40% of feed purchasers buy at least every 2-3 months.
How much would you say you spend on wild bird feed during one typical shopping trip or one online purchase?

Mean: $23.8

- 28% < $20
- 14% $21-40
- 58% $41+
More than half of purchasers buy wild bird feed from mass retailers.

There were no significant changes in purchase channel or package size purchase from 2014.

WHERE DO THEY BUY FEED?

- Mass retailer store (like Walmart or Target): 51%
- Hardware store (like Home Depot or Lowe's): 30%
- Grocery store: 25%
- Pet store: 24%
- Animal Feed store: 19%
- Garden Center or Nursery: 18%
- Club discount store (like Costco or Sam's Club): 13%
- Online: 9%
- Wild bird specialty store or boutique: 7%
- Other: 3%
Two-thirds purchase packages of 10 lbs. or less.
More than half of respondents are somewhat loyal to a brand, either buying the same product, or switching between a couple of brands. In 2015, more people said they have a couple of brands they switch between (up from 35%).
I would go to a different store to find my brand
I would purchase a different brand
I would not purchase any bird feed

However, **store loyalty** (or perhaps convenience) plays a larger role, with almost 80% saying they would change brands if the store where they shop stopped carrying the brand they usually buy. Even if their regular brand wasn’t available, 98% would still buy some brand of feed.
SHARE OF THE MARKET BY TYPES OF BIRD FEED

- Economy seed mix: 34%
- Straight seed (such as sunflower only, Nyjer®, etc.): 24%
- Premium seed mix: 21%
- Suet, bells, or pressed seed cakes: 16%
- Other: 5%
Importance rose for packaging related benefits like convenience for storage (up from 56%) and re-sealable packaging (up from 54%).

Price is the primary driver when purchasing wild bird feed, followed by attracting a wide variety of birds. Six in 10 purchasers also consider packaging to be an important factor.
4

BIRD FEEDERS SHOPPING HABITS & PREFERENCES
HOW OFTEN DO THEY BUY FEEDERS?

More than 90% of wild bird feed purchasers buy feeders, but fewer than half of those purchasers buy at least once a year.
How much would you say you spend on wild bird feeders in a typical year?

How much do they spend on FEEDERS / YEAR?

- $0: 12%
- >$20: 16%
- $21-$40: 26%
- $41-$80: 24%
- $81+: 12%

Base: wild Bird Feeders Purchasers
n=850
Similar to feed, about half of respondents shop at mass retailers for their feeders, with hardware stores also garnering a noteworthy share of feeder purchases.
CURRENTLY OWNED TYPES OF FEEDERS

How many of the following wild bird FEEDERS do you currently have and use?

- **Tube**: 30% - 33% own 1, 15% own 2, 12% own 3, 7 own 4, and 3 own 5 or more
- **Hopper chalet or lantern**: 33% - 34% own 1, 13% own 2, 12% own 3, 6 own 4, and 2 own 5 or more
- **Nectar**: 35% - 29% own 1, 16% own 2, 11% own 3, 6 own 4, and 3 own 5 or more
- **Cages (for seed cake bells or suet)**: 42% - 25% own 1, 14% own 2, 10% own 3, 6 own 4, and 2 own 5 or more
- **Platform**: 56% - 19% own 1, 9% own 2, 10% own 3, 5 own 4, and 2 own 5 or more

**Tube, hopper and nectar feeders** are the most commonly owned, with 60% owning one or more.
FUTURE PURCHASE TYPES OF FEEDERS

How many of the following wild bird FEEDERS do you plan to purchase in the next 12 months?

- Nectar: 51%
  - 0: 24%
  - 1: 9%
  - 2: 8%
  - 3: 6%
  - 4: 1%
  - 5 or more: 1%

- Tube: 52%
  - 0: 27%
  - 1: 6%
  - 2: 8%
  - 3: 5%
  - 4: 2%
  - 5 or more: 1%

- Hopper chalet or lantern: 55%
  - 0: 24%
  - 1: 7%
  - 2: 8%
  - 3: 5%
  - 4: 2%
  - 5 or more: 1%

- Cages (for seed cake bells or suet): 60%
  - 0: 21%
  - 1: 6%
  - 2: 8%
  - 3: 5%
  - 4: 2%
  - 5 or more: 1%

- Platform: 65%
  - 0: 16%
  - 1: 5%
  - 2: 9%
  - 3: 4%
  - 4: 1%
  - 5 or more: 1%

Additionally, nearly half of respondents expect to purchase these same types in the next year.
Price and durability are the primary factors in feeder choice, with over half of respondents citing each.
5

GENERAL BIRD FEEDING HABITS

& ACTIVITIES
BIRD FEEDING IS A FAMILY ACTIVITY

Who in your household participates in wild bird feeding, whether it is watching the birds, refilling the feeders, or other related activity?

4/5th of wild bird feed purchasers participate in feeding the birds themselves. When we consider only those who do participate, almost 40% do so with their spouses and 1/5th with their children, making feeding a family activity for many.
Wild bird feeding is well distributed from urban to rural areas, although nearly half live in the suburban areas.

Which of the following best describes the type of area you live in?
BRIGHT FUTURE FOR WILD BIRD FEEDING
Among those that **do not buy** wild bird feed or feeders, half say that they “just never have.” This suggests that with **education and attraction**, an interest could develop in wild bird feeding, moving some of these to become purchasers.
Indeed, almost half of non-purchasers say that they might purchase wild bird feed in the future.
Only 10% of respondents say that this is their first year of wild bird feeding, suggesting that once someone begins, it’s an activity that will continue for years to come.
MARKET IS GROWING

Expectations are that the market is growing. Nearly one-third of purchasers expect to spend more this year on wild bird feed and feeders, and more than half will maintain their spending level.
7

PERSONAS

CUSTOMER DNA
Personas broken out by favorite wild bird FEED brands
Nearly Empty Nesters

[Brand U] users aren’t getting any younger, and seek daily comforts with convenience, self-improvement, and/or distraction

Q10. Which of these brands of wild bird FEED have you purchased more than once?

[Brand U]

May be considering college tuition
Children age 13-17 in household

Diverse tastes in fun, want the latest
Wants Google TV, surround sound system, HDTV
Listens to opera, reggae, punk Gamer: sports, combat, city-building, adventure
Watches boxing, swimming/water sports

Mindful of environment
Wants electric/hybrid auto
Recycles electronic equipment

Wants to recapture fading youth
Anti-hair loss product user
Hair gel consumer
Hair salon coloring customer

I shop, therefore I am
In need of immediate gratification
A shopaholic

Dining convenience and comfort
Drinks Diet Dr Pepper, Fanta, Sprite
Uses coffee grinder, waffle maker, toaster oven
Eats chicken nuggets, deli meat, chili

Seeks wellness
Buys organic food and cosmetics
Does track & field, body building, golfing, team sports, dancing, meditation, yoga
Uses air purifier

Diverse hobbies, feathering the nest
Hobbies: filmmaking, painting/drawing, gardening
Collector: rock/gem/mineral/fossil, music memorabilia
Recent home remodel

Shopping convenience and value
Shops at Macy’s, Costco, AM PM mini market, Exxon Mobil On The Run, Amazon.com, Sears, CVS, Wal-Mart, Ebay, Target

Blends fun with tech savvy
Watches TV more than 4 hours/day
Watches pay-per-view/VOD, Biography Channel, Hulu, Nickelodeon, Headline News, Disney Channel, E! Channel, SyFy
Reads newspapers: business/finance section, comics
Amazon Cloud user

Actively seeking tech upgrades
Wants digital projector, Macbook Air, Bluetooth earphone, iPad, Blu-ray disc player
Listens to music on cell phone

Global jetsetter
Delta Air Lines award member
Traveled recently to Asia, Caribbean
Uses Uber, Priceline, Travelocity
Personas broken out by favorite wild bird FEEDER/suet/seed cake/bell brands
Q11. Which of these brands of wild bird FEEDERS, SUET, or SEED CAKE/BELLS have you purchased more than once?

[Brand L]

City families
Has child(ren) in household
Urban resident

Blends fun with the intellectual
Listens to jazz, audiobooks
Blu-ray disc player
Plays video games every day
CD consumer

Environmentally minded
Wants electric vehicle

Financially savvy
Trader/investor

Travel-savvy
AAA Member
Makes business or personal travel plans online
Has been to Caribbean, New York

Wellness-minded, to a point
Smokes marijuana, cigars
Has used Jenny Craig
Does aerobics, archery, yoga
Buys organic cosmetics and cleaning products
Purchases gluten-free products
Electric air cleaner shopper
Carl's Jr. customer

Highly media-savvy
Reads Newsweek, women's interest publications
Uses Flickr, WordPress, Tumblr, AOL IM, Blogger, Instagram
Reads newspaper: TV/radio listings
Listens to Google Play Music, Spotify, news radio

Non-trendy devices
Owns Samsung cell phone, Bluetooth earphone
Land line phone at home

Seeks external affirmation
Trendy, prefers possessions over experiences, a show-off
Liberal
Superstitious
Snarky, a gossip lover
Gullible
Hedonistic, in need of immediate gratification

Shops quality with convenience
Shops at Avon, Zappos, AM PM mini market, Zazzle.com, Costco, Kmart, CafePress.com, Amazon.com

Traditional hobbies, enjoys feathering the nest
Stamp collector
Wood working hobbyist
Poetry writing hobbyist
Recent home improvement

Easy Chic

[Brand L] customers crave the latest and greatest, except in technology. They seek self-improvement, if it’s fun and convenient.
2: Which of the following reasons describes why you never buy wild bird feed or feeders?

<table>
<thead>
<tr>
<th>Answer</th>
<th>Resp. (1162)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1: Feeding birds is not allowed where I live</td>
<td>6.7% (79)</td>
</tr>
<tr>
<td>A2: I have other pets</td>
<td>22.2% (259)</td>
</tr>
<tr>
<td>A3: I don't know how</td>
<td>5.4% (63)</td>
</tr>
<tr>
<td>A4: Just never have</td>
<td>54.1% (629)</td>
</tr>
<tr>
<td>A5: Bird feed attracts undesirable pests</td>
<td>8.6% (100)</td>
</tr>
<tr>
<td>A6: Too many weeds growing under feeder</td>
<td>1.2% (15)</td>
</tr>
<tr>
<td>A7: I don't like birds</td>
<td>9.8% (115)</td>
</tr>
<tr>
<td>A8: The cost of feed</td>
<td>9.6% (112)</td>
</tr>
<tr>
<td>A9: Other</td>
<td>7.0% (82)</td>
</tr>
</tbody>
</table>

The bar chart illustrates the distribution of responses.
Q2. Which of the following reasons describes why you never buy wild bird feed or feeders?

A1. Feeding birds is not allowed where I live
A2. I have other pets
A3. I don't know how
A4. Just never have
A5. Bird feed attracts undesirable pests
A6. Too many weeds growing under feeder
A7. I don't like birds
A8. The cost of feed
A9. Other

Homeowner

TOTALS:
Total survey responses: 1162
Total relevant tags (shown): 170
Total tags in the database: 2891
Q2. Which of the following reasons describes why you never buy wild bird feed or feeders?

A1. Feeding birds is not allowed where I live
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A8. The cost of feed
A9. Other

TOTALS:
Total survey responses: 1162
Total relevant tags (shown): 59
Total tags in the database: 2891
Q2. Which of the following reasons describes why you never buy wild bird feed or feeders?

A1. Feeding birds is not allowed where I live
A2. I have other pets
A3. I don't know how
A4. Just never have
A5. Bird feed attracts undesirable pests
A6. Too many weeds growing under feeder
A7. I don't like birds
A8. The cost of feed
A9. Other

25-34

TOTALS:
Total survey responses: 1162
Total relevant tags (shown): 59
Total tags in the database: 2891
Q2. Which of the following reasons describes why you never buy wild bird feed or feeders?

A1. Feeding birds is not allowed where I live
A2. I have other pets
A3. I don’t know how
A4. Just never have
A5. Bird feed attracts undesirable pests
A6. Too many weeds growing under feeder
A7. I don’t like birds
A8. The cost of feed
A9. Other

Cell phone user with no landline

TOTALS:
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A6. Too many weeds growing under feeder
A7. I don't like birds
A8. The cost of feed
A9. Other
Goes to movie theaters

TOTALS:
Total survey responses: 1162
Total relevant tags (shown): 59
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A6. Too many weeds growing under feeder
A7. I don’t like birds
A8. The cost of feed
A9. Other

Surfs web on cell phone
NEXT STEPS
DEEPER DIVE
1. GET MORE ACCURATE ESTIMATES

2. BETTER UNDERSTAND CUSTOMER’S DNA

3. GET MORE SPECIFIC
EDUCATE & ENGAGE THE OTHER HALF OF THE POPULATION!

Tell the story in a way that people will enjoy and help evangelize among their peers. Publishing an infographic is one of the proven ways to viral growth. Opportunity for immediate growth is at least 50% of existing market size!