



**RESEARCH
FOUNDATION**



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
N = 2000 (+2000)
Balanced by region

DISCLAIMER

APPROXIMATION

PURCHASE VOLUMES, PREFERENCES AND DERIVED MARKET SIZE
ARE BASED ON **CONSUMERS' MEMORY**
OF THEIR PURCHASES WITHIN LAST YEAR.

2

KEY FINDINGS

MARKET SIZE

USA



125 MM ➔

52.5 MM (42.1%)

ESTIMATED NUMBER OF
HOUSEHOLDS IN 2014

OF HOUSEHOLDS BUY WILD BIRD FEED
AT LEAST SOMETIMES

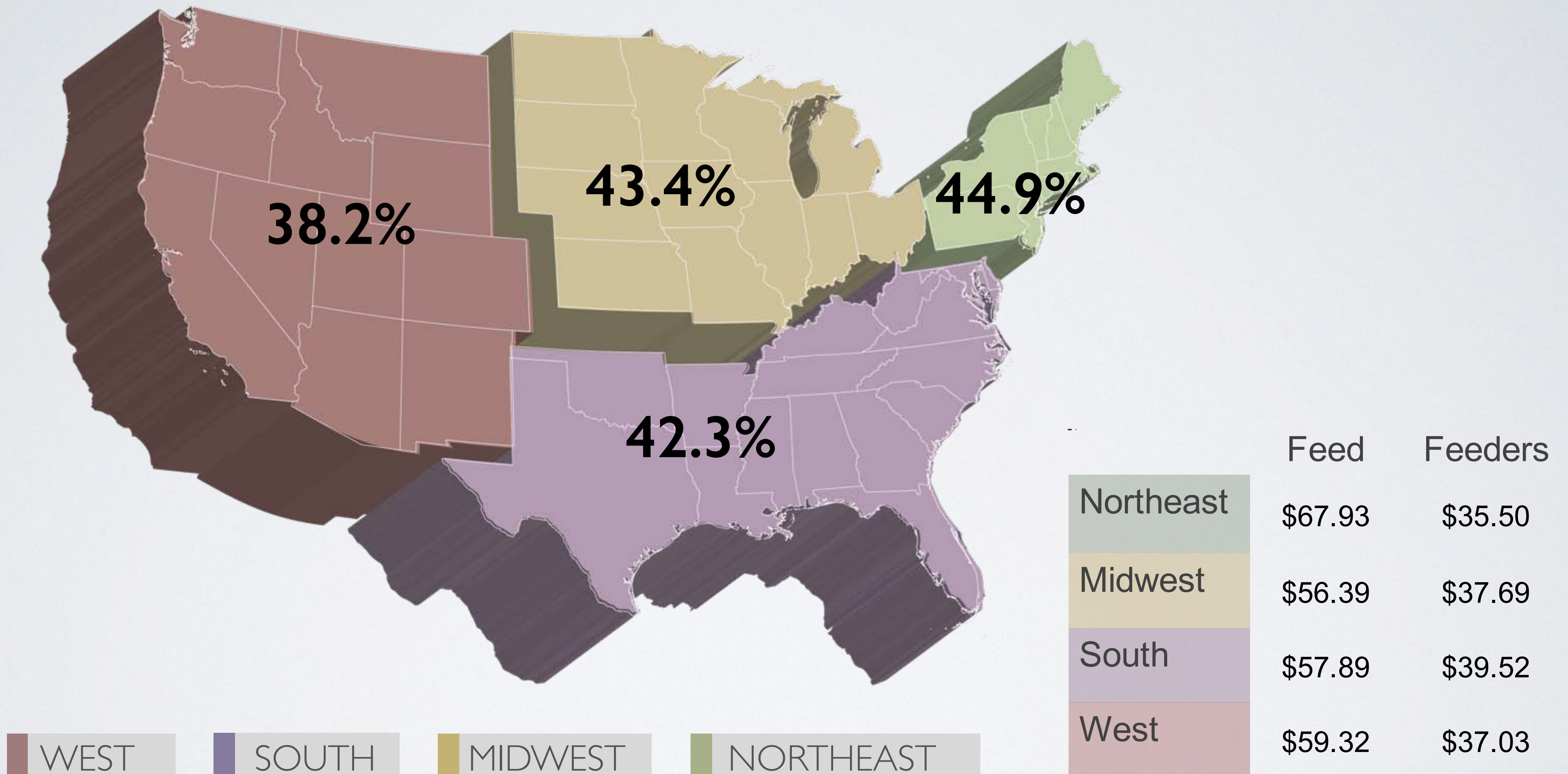
\$59.73 - AVERAGE ANNUAL SPEND
ON WILD BIRDS **FEED**

\$37.88 - AVERAGE ANNUAL SPEND
ON WILD BIRDS **FEEDERS**



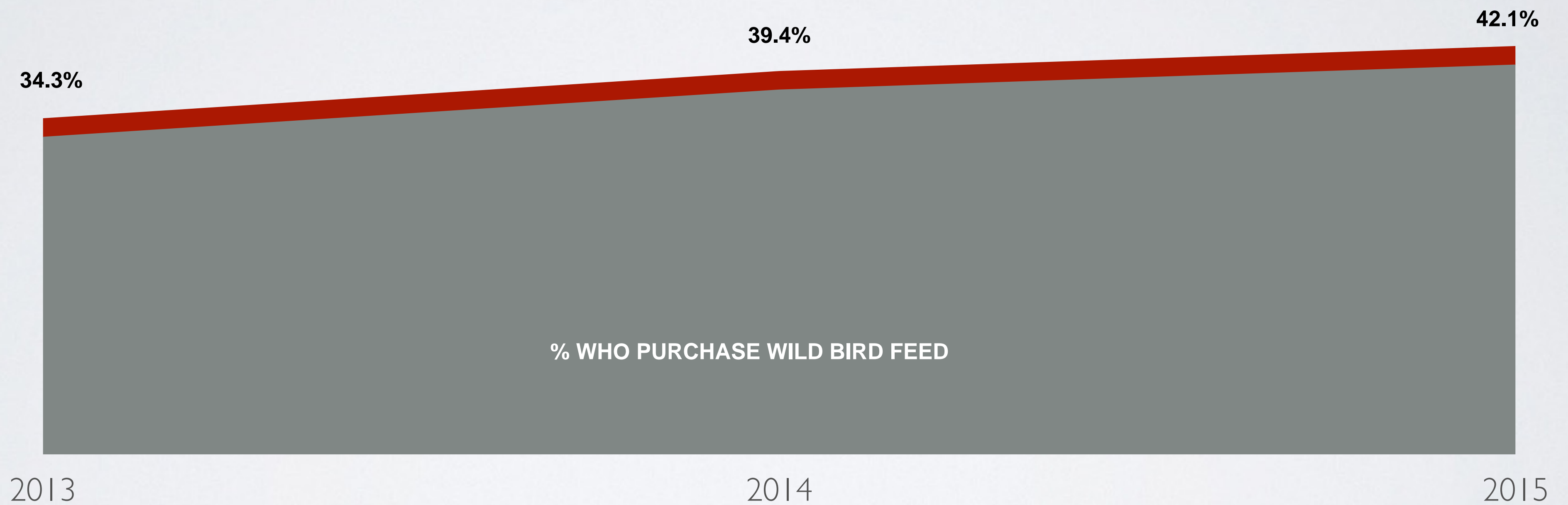
🏠 = 1,000,000 HOUSEHOLDS

MARKET SIZE BY US REGIONS



GROWTH

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



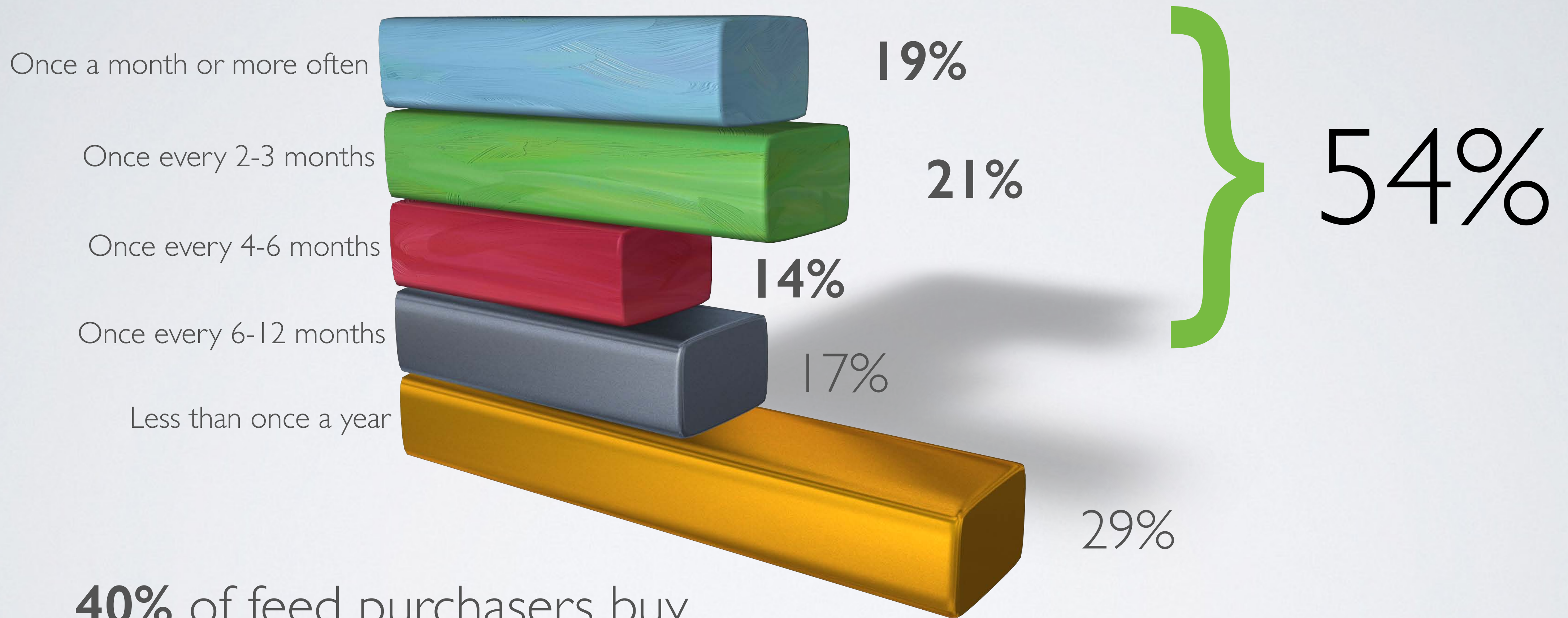
ADDITIONAL MARKET FINDINGS

- 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.

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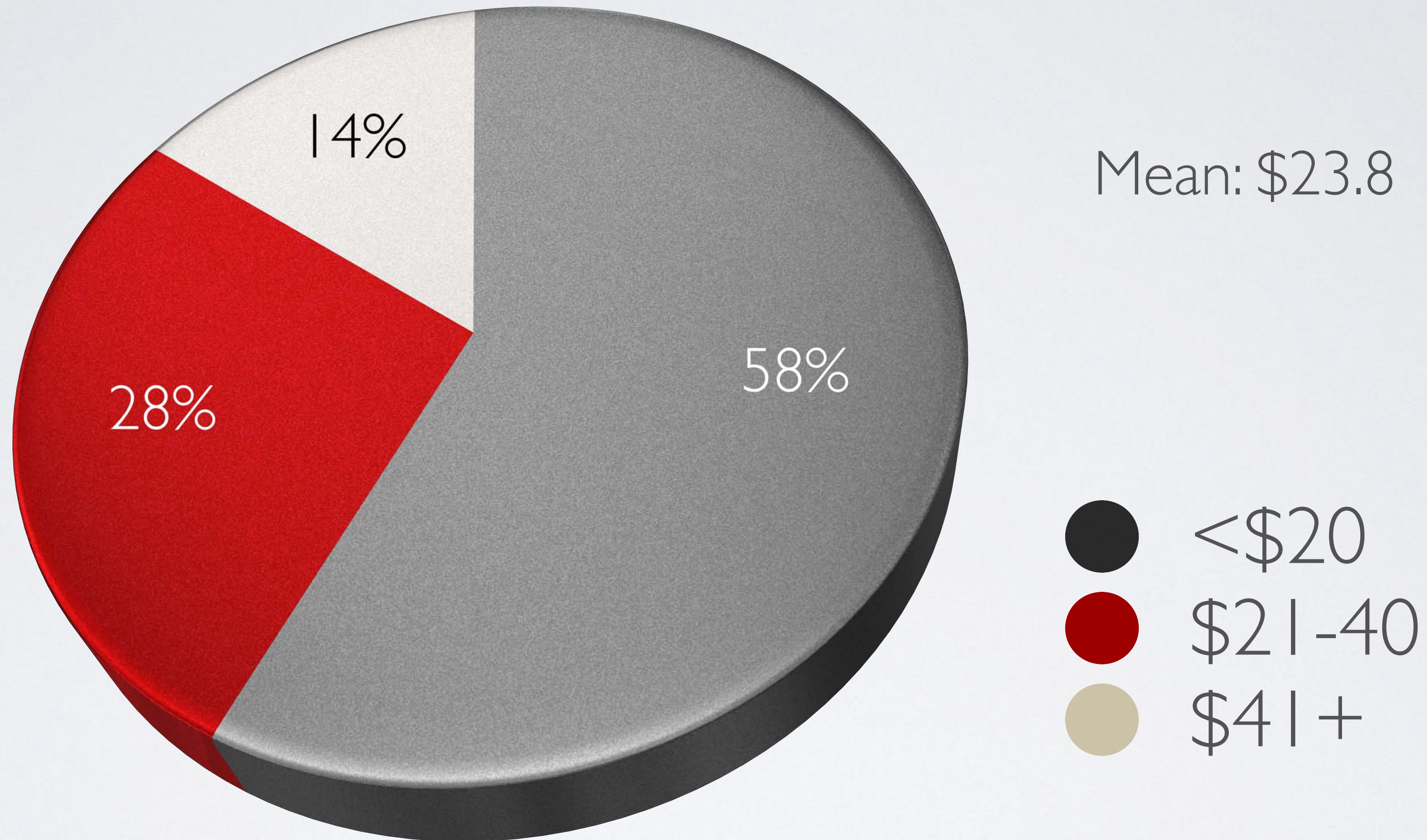
BIRD **FEED** SHOPPING HABITS
& PREFERENCES

HOW FREQUENTLY DO THEY BUY **FEED**?



40% of feed purchasers buy
at least every 2-3 months

HOW MUCH DO THEY SPEND AT A TIME?



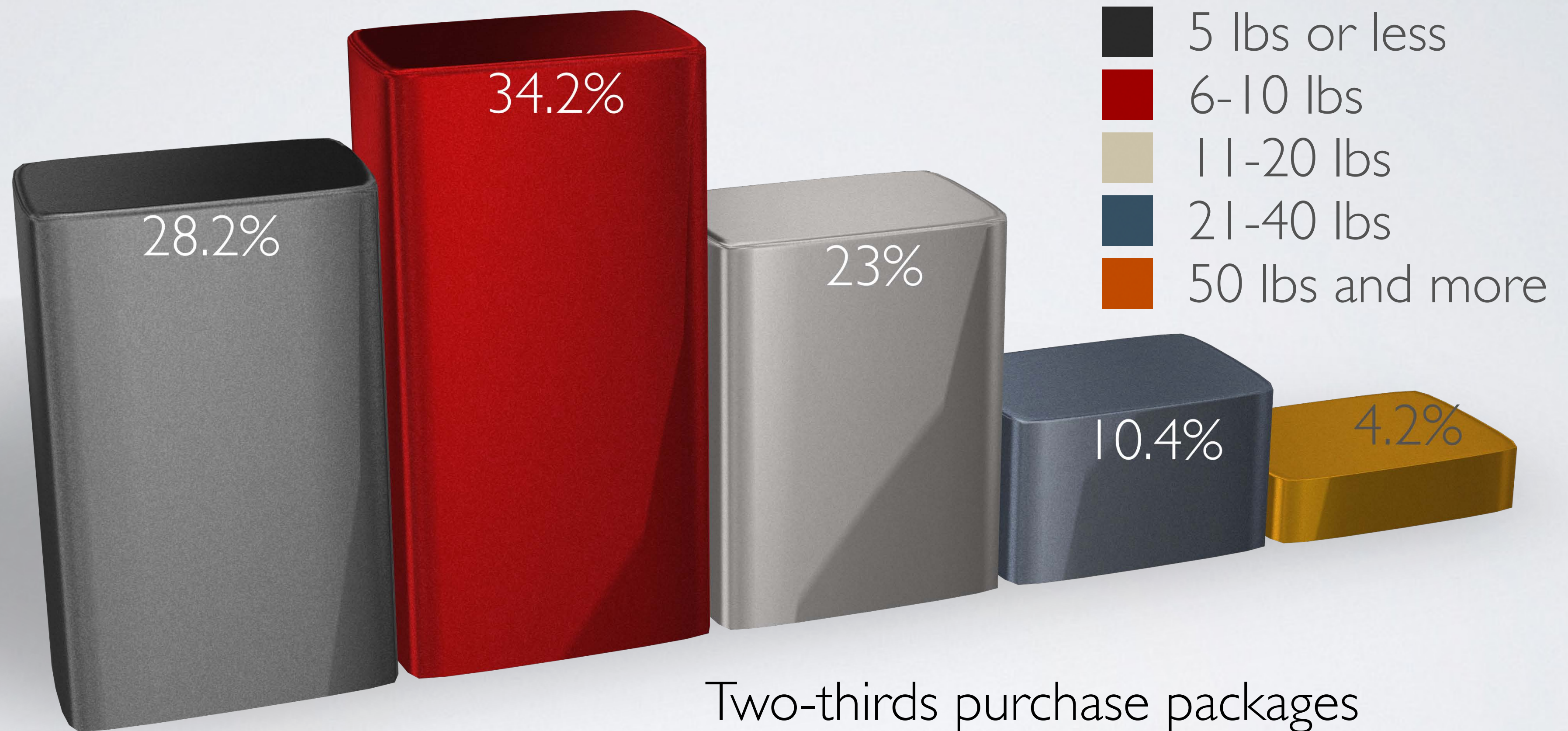
How much would you say you spend on wild bird **feed** during one typical shopping trip or one online purchase?

WHERE DO THEY BUY FEED?



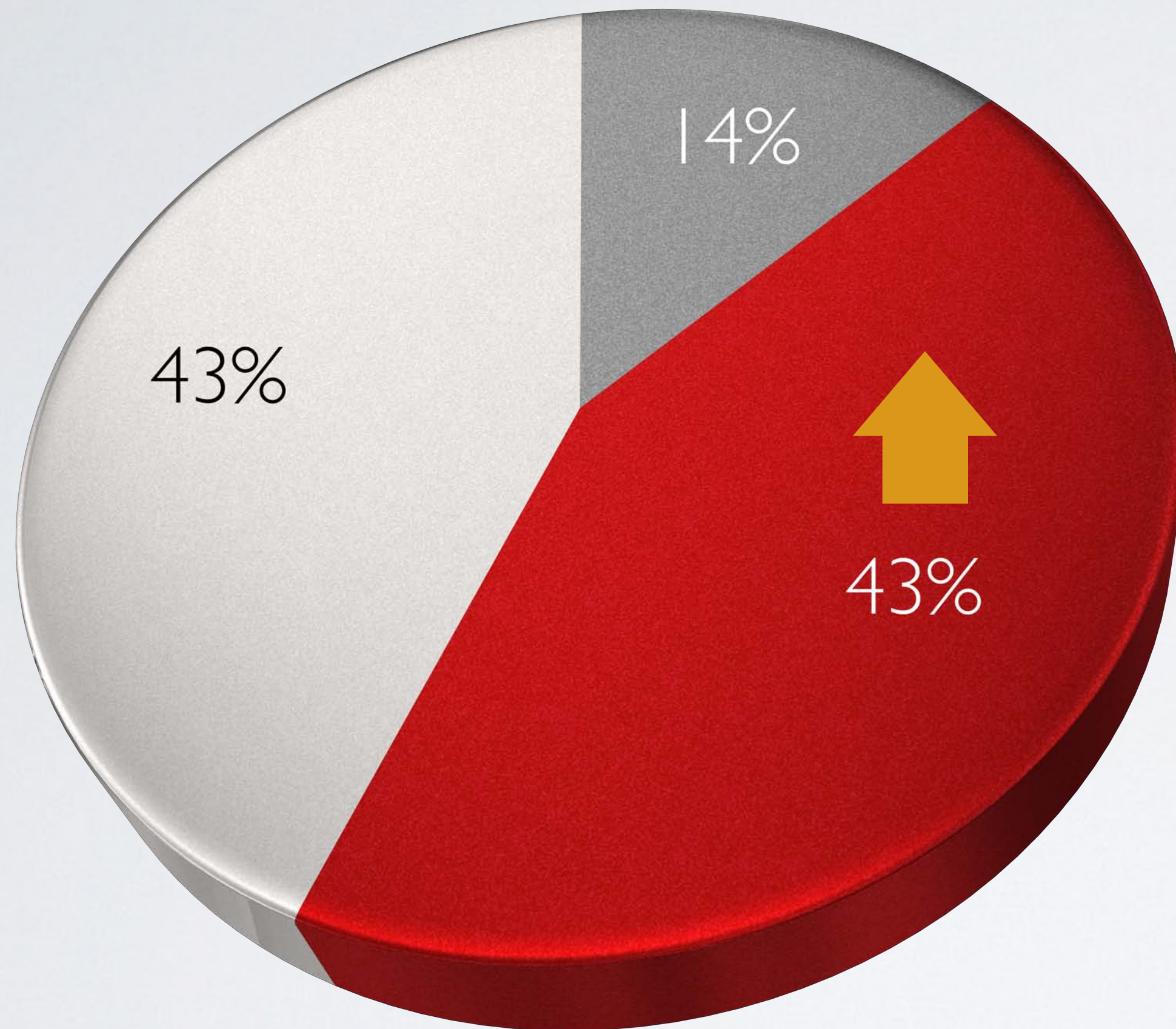
More than half of purchasers buy wild bird feed from **mass retailers**.

FEED PACKAGE SIZE



Two-thirds purchase packages of **10 lbs. or less.**

FEED BRAND LOYALTY



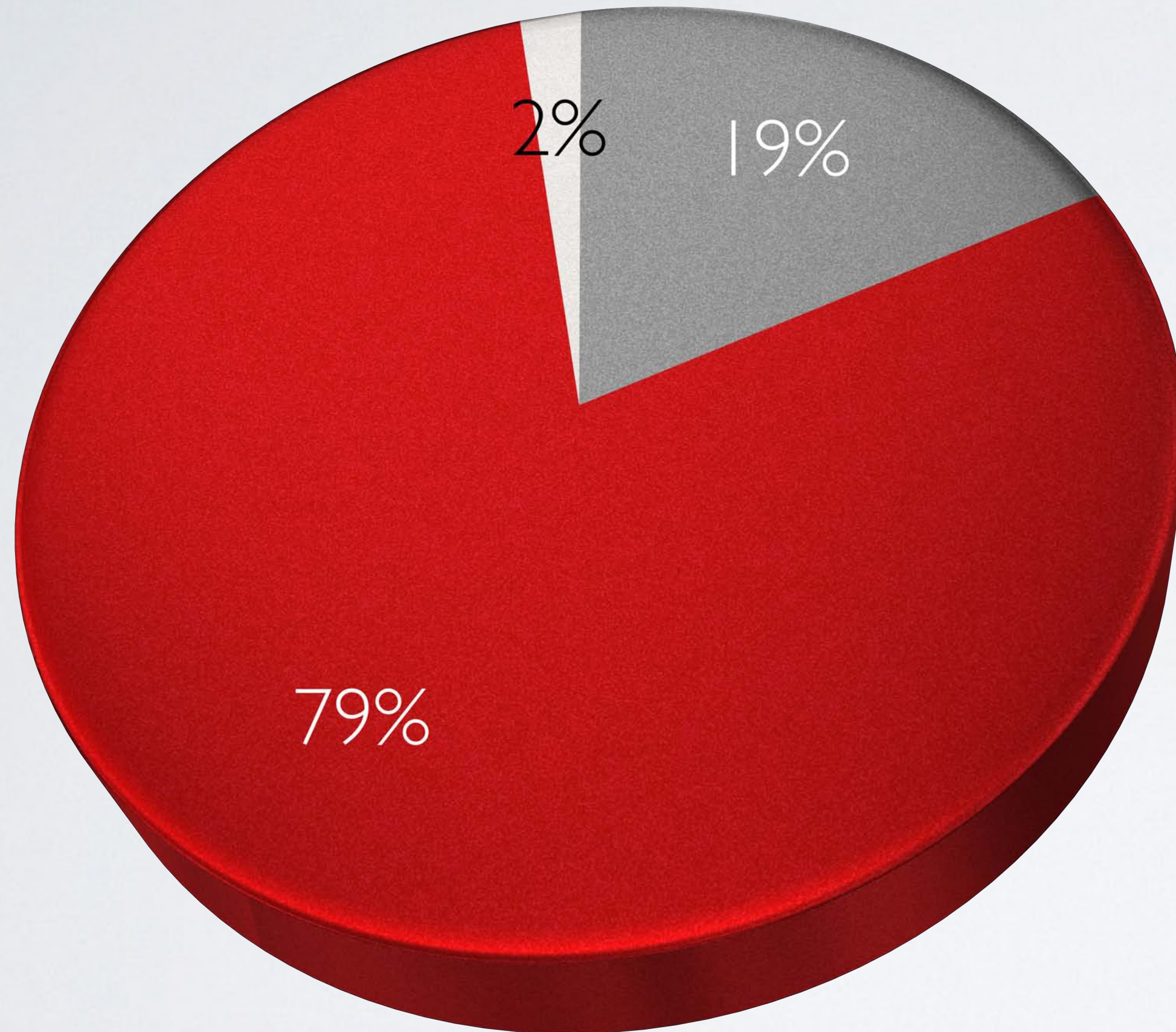
- I always buy the same brand
- I have a couple of brands that I switch between
- Brand doesn't matter

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%).

FEED RETAILER LOYALTY

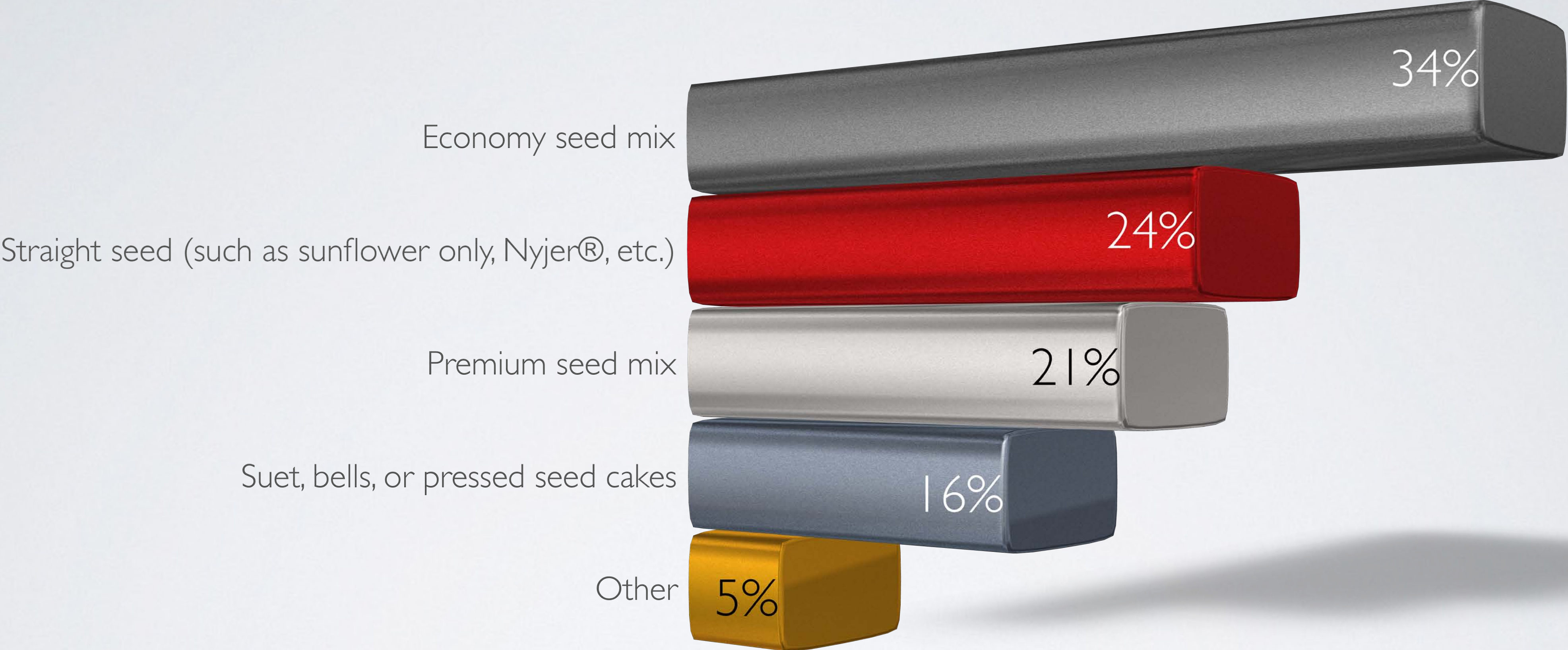
Which of the following best describes what you would most likely do if the store you buy from stops carrying your brand(s) of wild bird FEED?

- I would go to a different store to find my brand
- I would purchase a different brand
- I would not purchase any bird feed



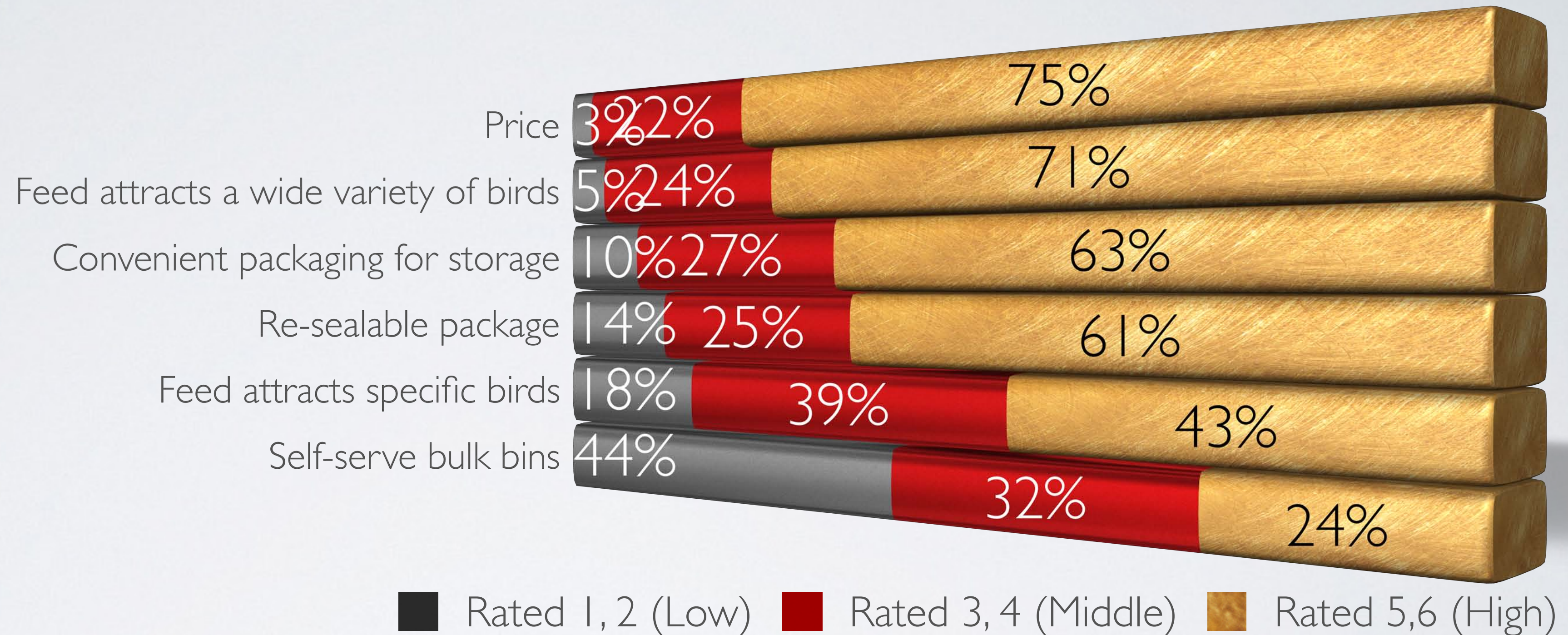
However, **store loyalty** (or perhaps convenience) plays a larger role, with almost **80%** saying they would change brands if the store where they shop stopped carrying the brand they usually buy. Even if their regular brand wasn't available, **98%** would still buy some brand of feed.

SHARE OF THE MARKET BY TYPES OF BIRD FEED



FEED PURCHASE DRIVERS

Importance rose for packaging related benefits like convenience for storage (up from 56%) and re-sealable packaging (up from 54%).

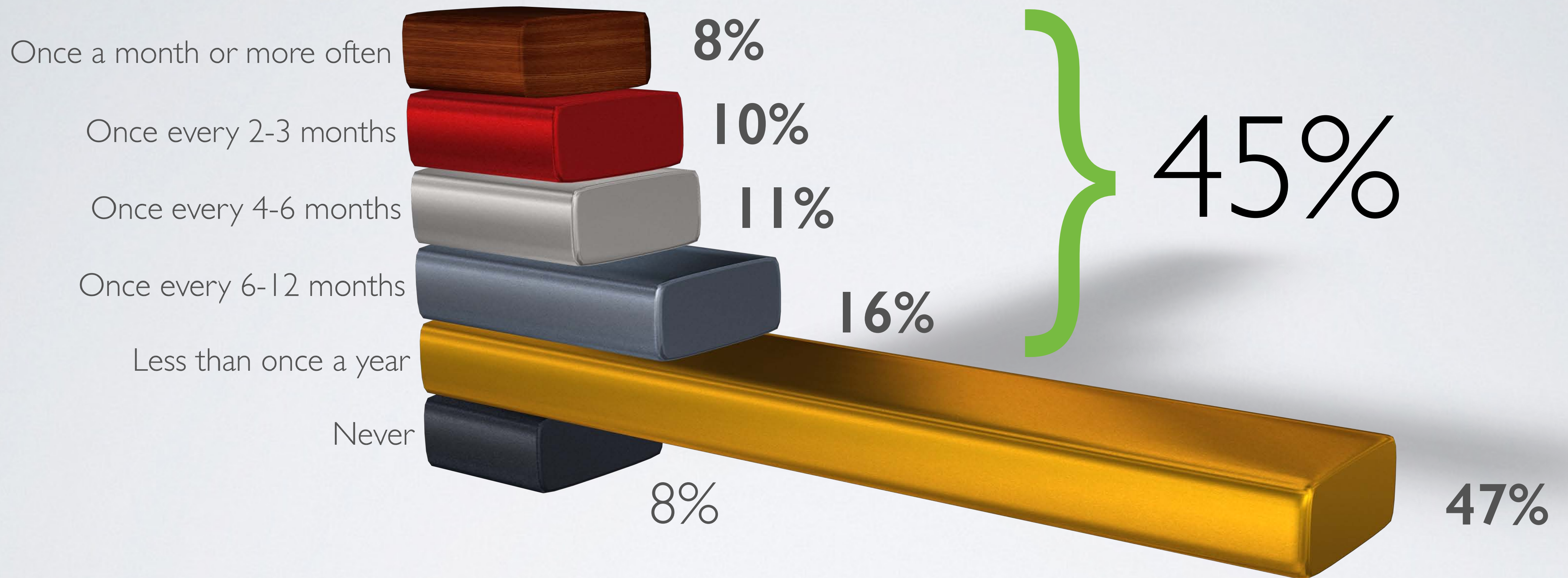


Price is the primary driver when purchasing wild bird feed, followed by attracting a **wide variety** of birds. Six in 10 purchasers also consider packaging to be an important factor.

4

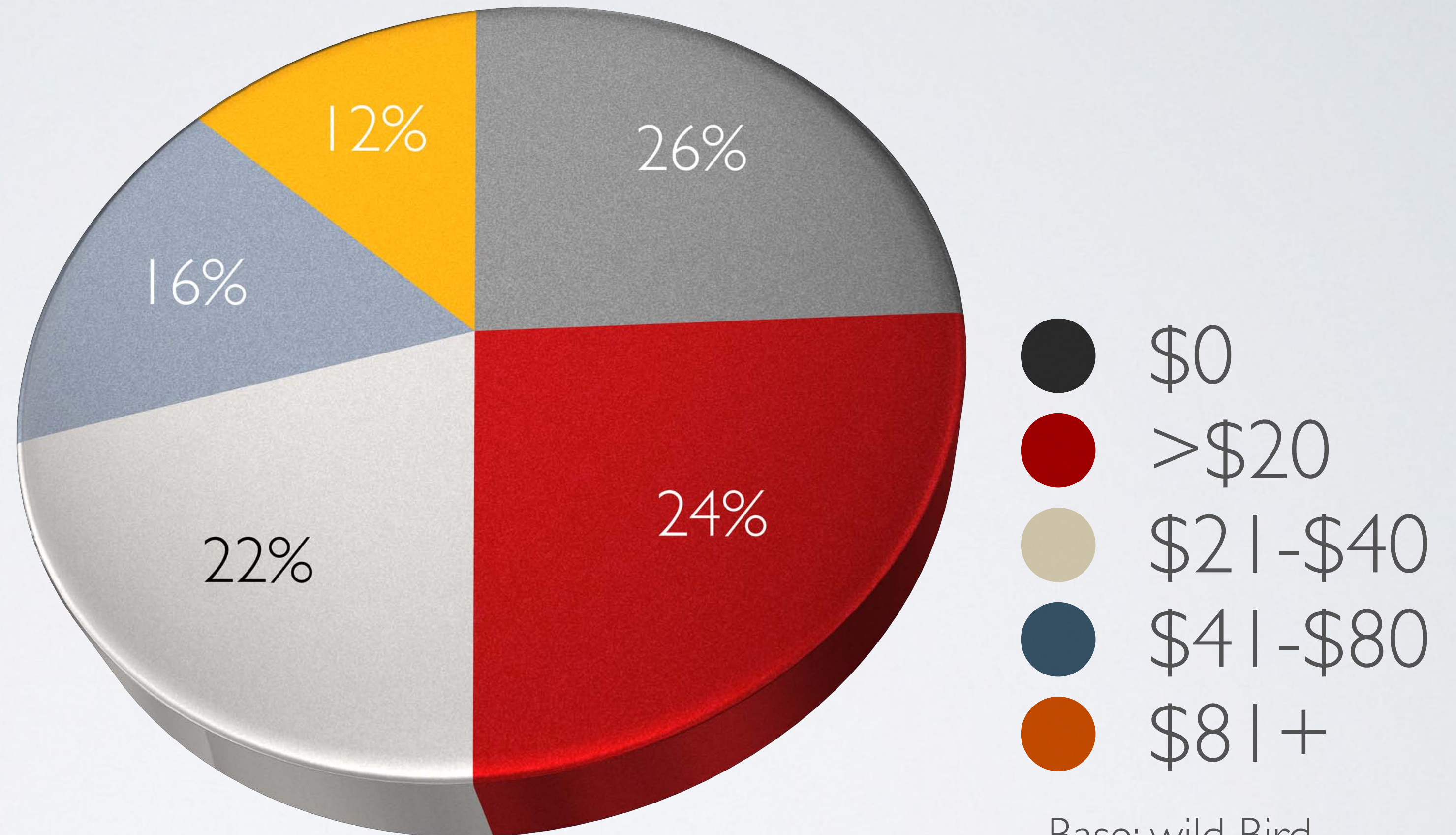
BIRD **FEEDERS** SHOPPING HABITS & PREFERENCES

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 DO THEY SPEND ON **FEEDERS** /YEAR?



How much would you say you spend on wild bird **feeders** in a typical year?

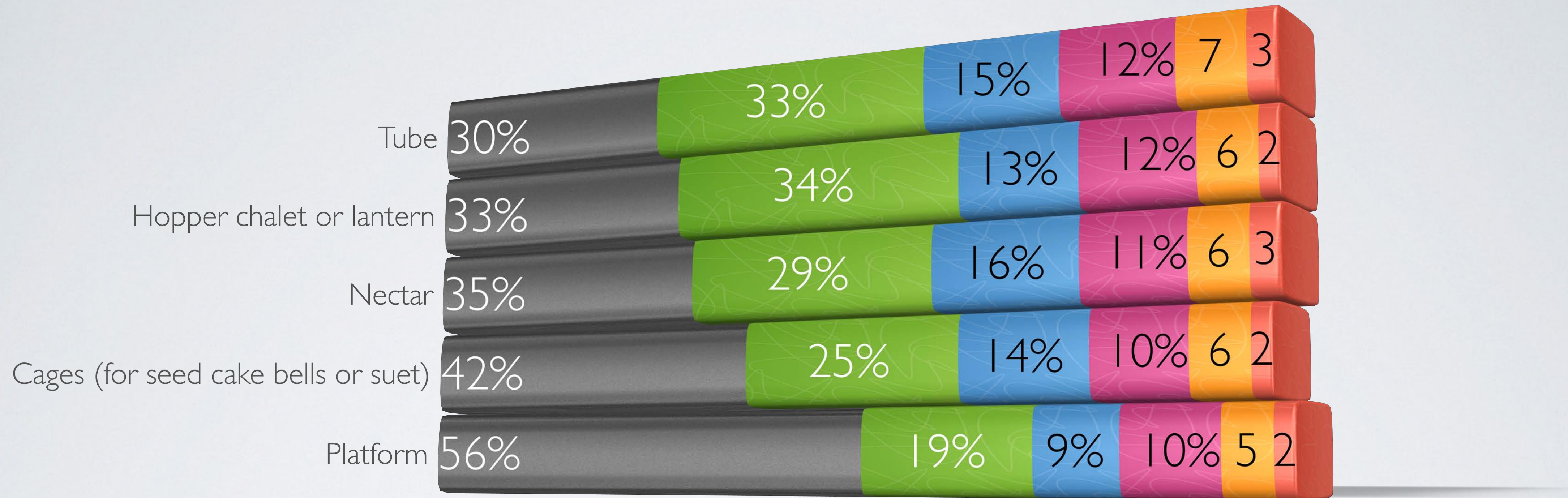
Base: wild Bird
Feeders Purchasers
n=850

WHERE DO THEY BUY FEEDERS?



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

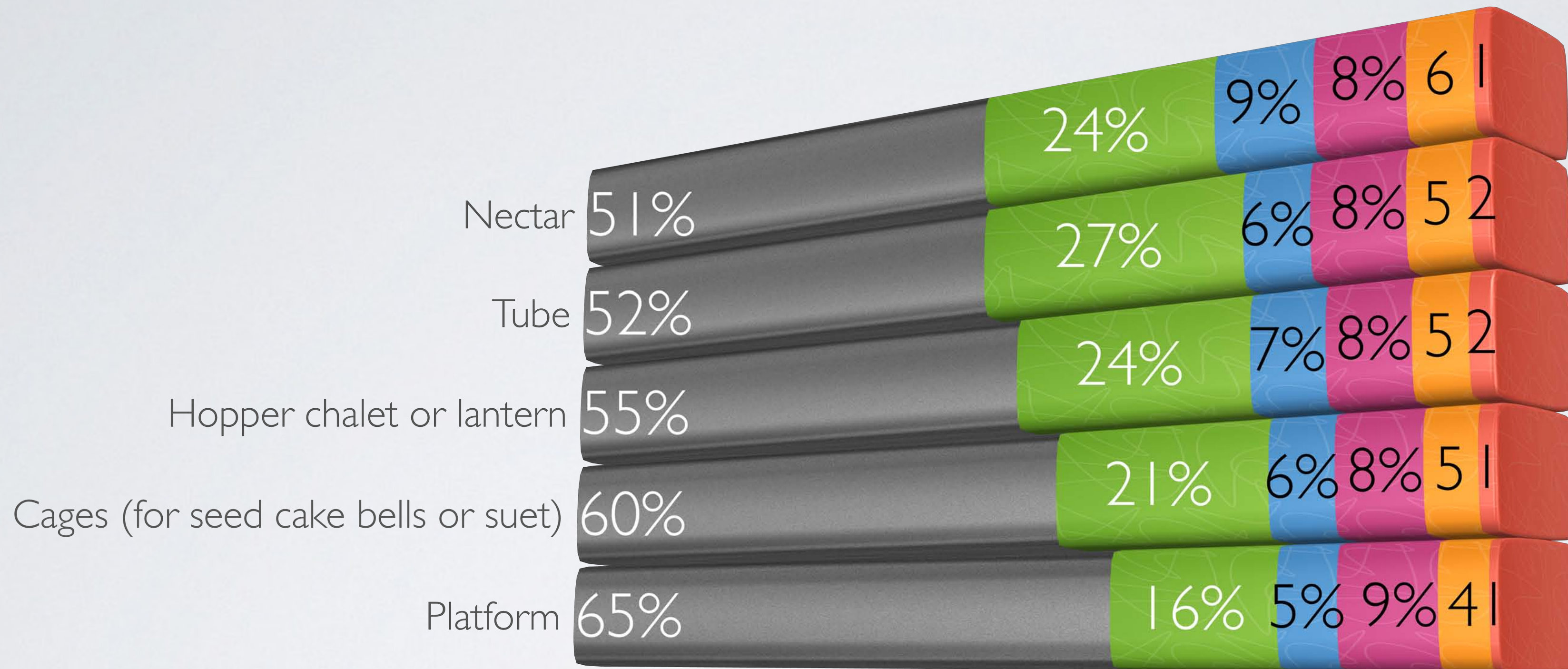


How many of the following wild bird FEEDERS do you currently have and use?

0
 1
 2
 3
 4
 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?

0
 1
 2
 3
 4
 5 or more

Additionally, nearly half of respondents expect to **purchase** these **same types** in the next year.

FEEDERS PURCHASE DRIVERS



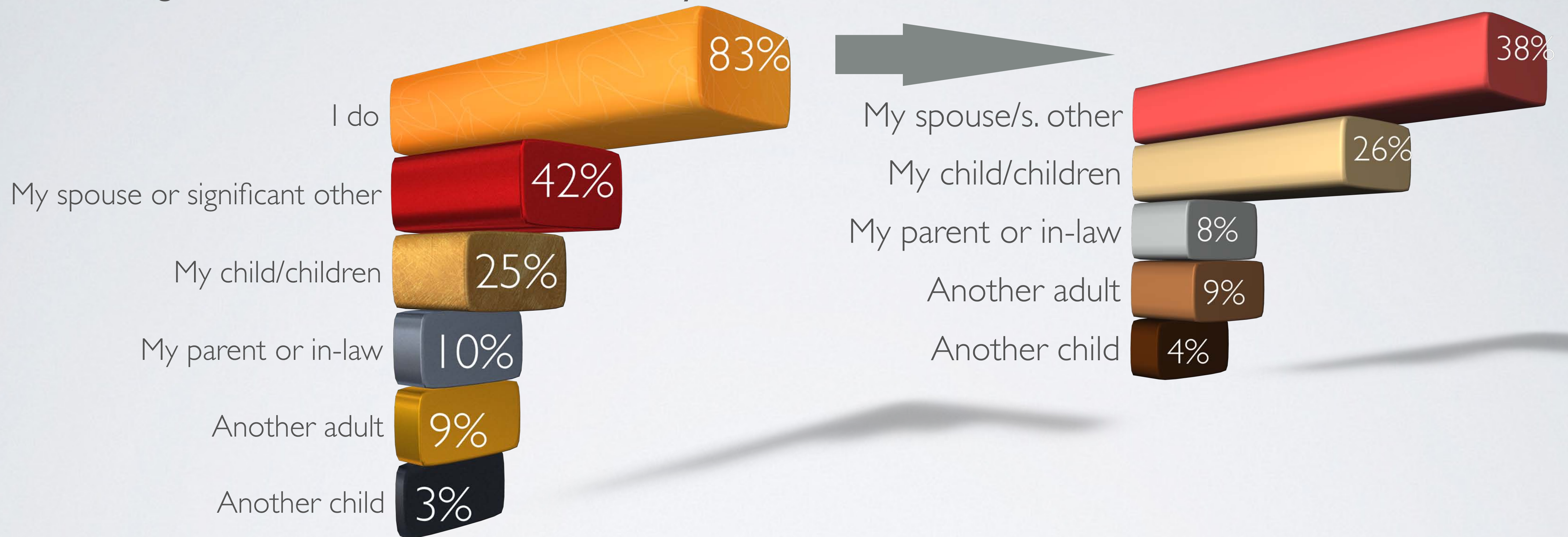
Price and **durability** are the primary factors in feeder choice, with over half of respondents citing each.

5

GENERAL BIRD FEEDING HABITS & ACTIVITIES

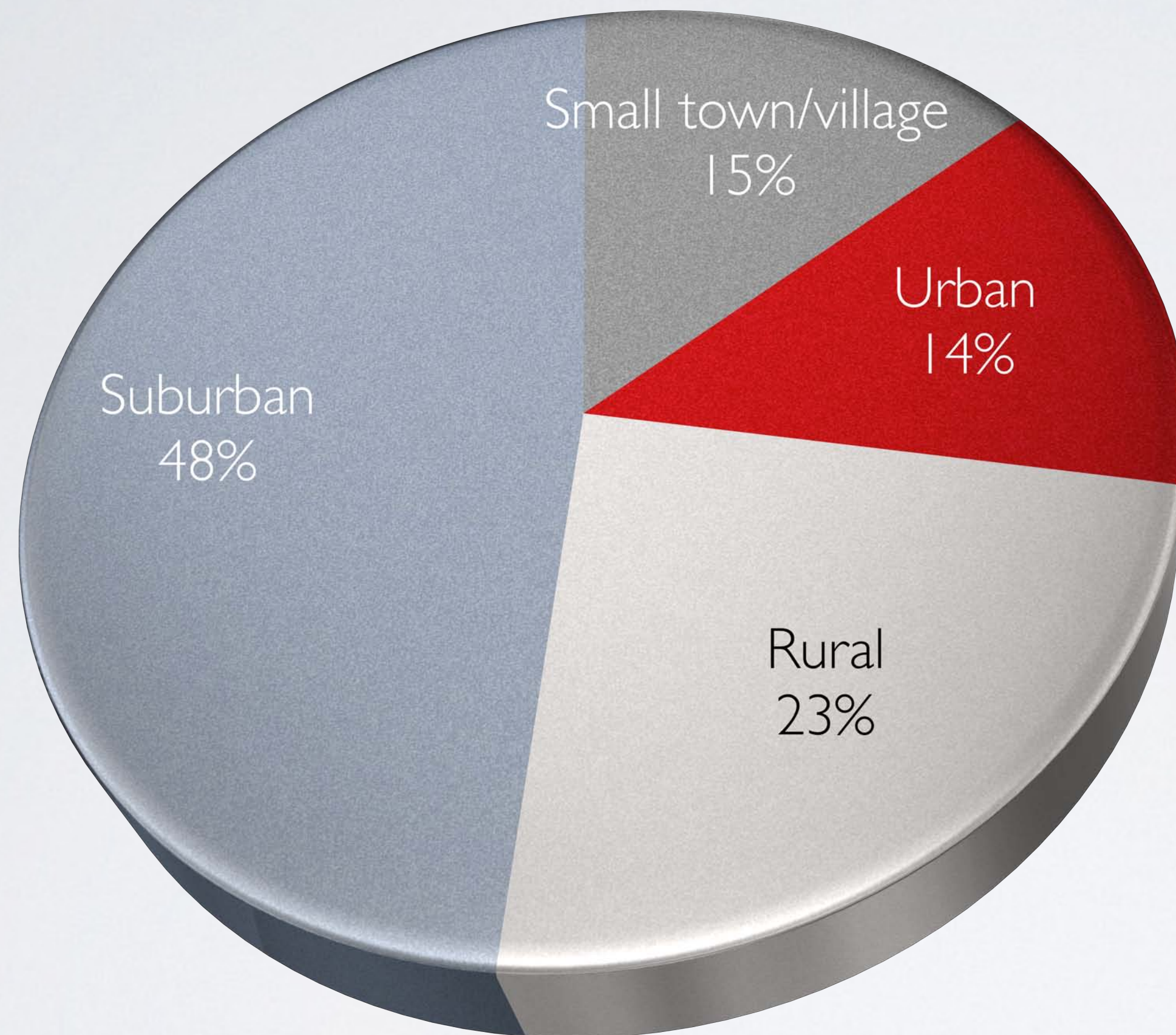
BIRD FEEDING IS A FAMILY ACTIVITY

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.

WHERE DO THEY LIVE?



Which of the following best describes the type of area you live in?

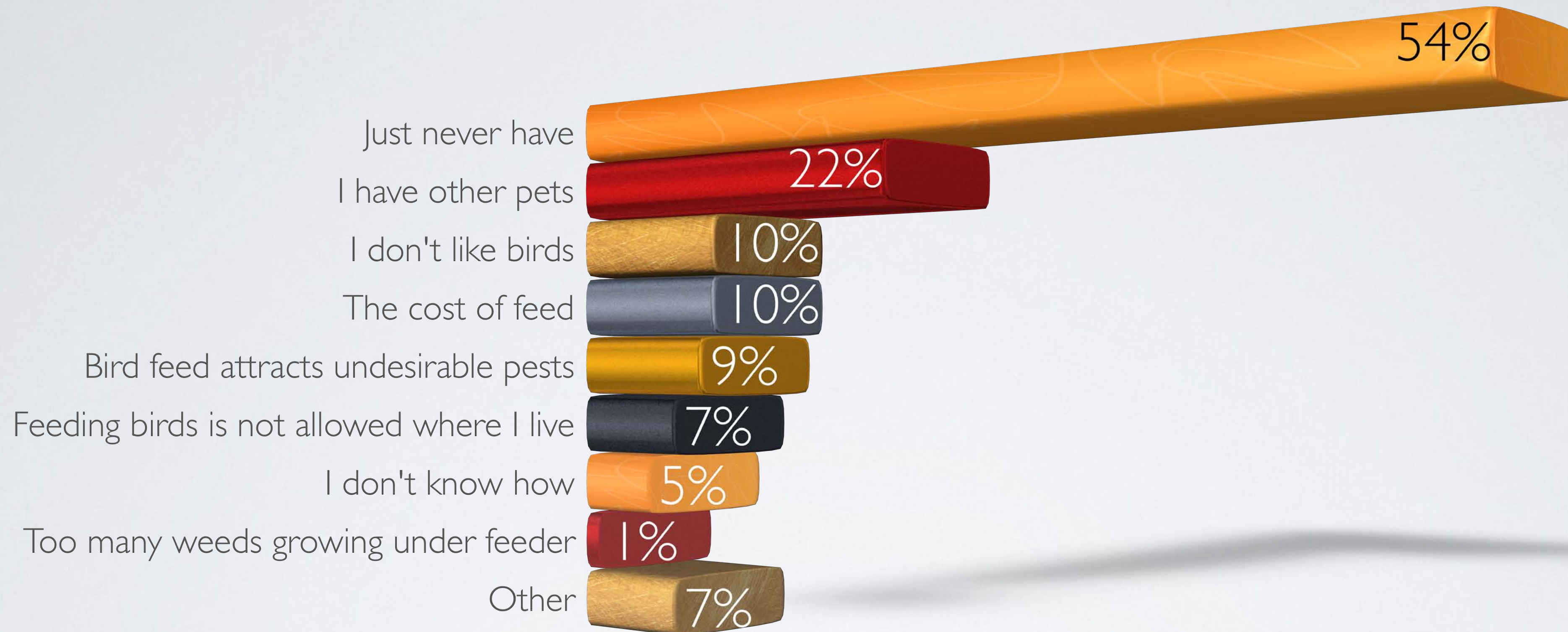
Wild bird feeding is well distributed from urban to rural areas, although nearly half live in the suburban areas.

6

BRIGHT FUTURE

FOR WILD BIRD FEEDING

WHY NOT?



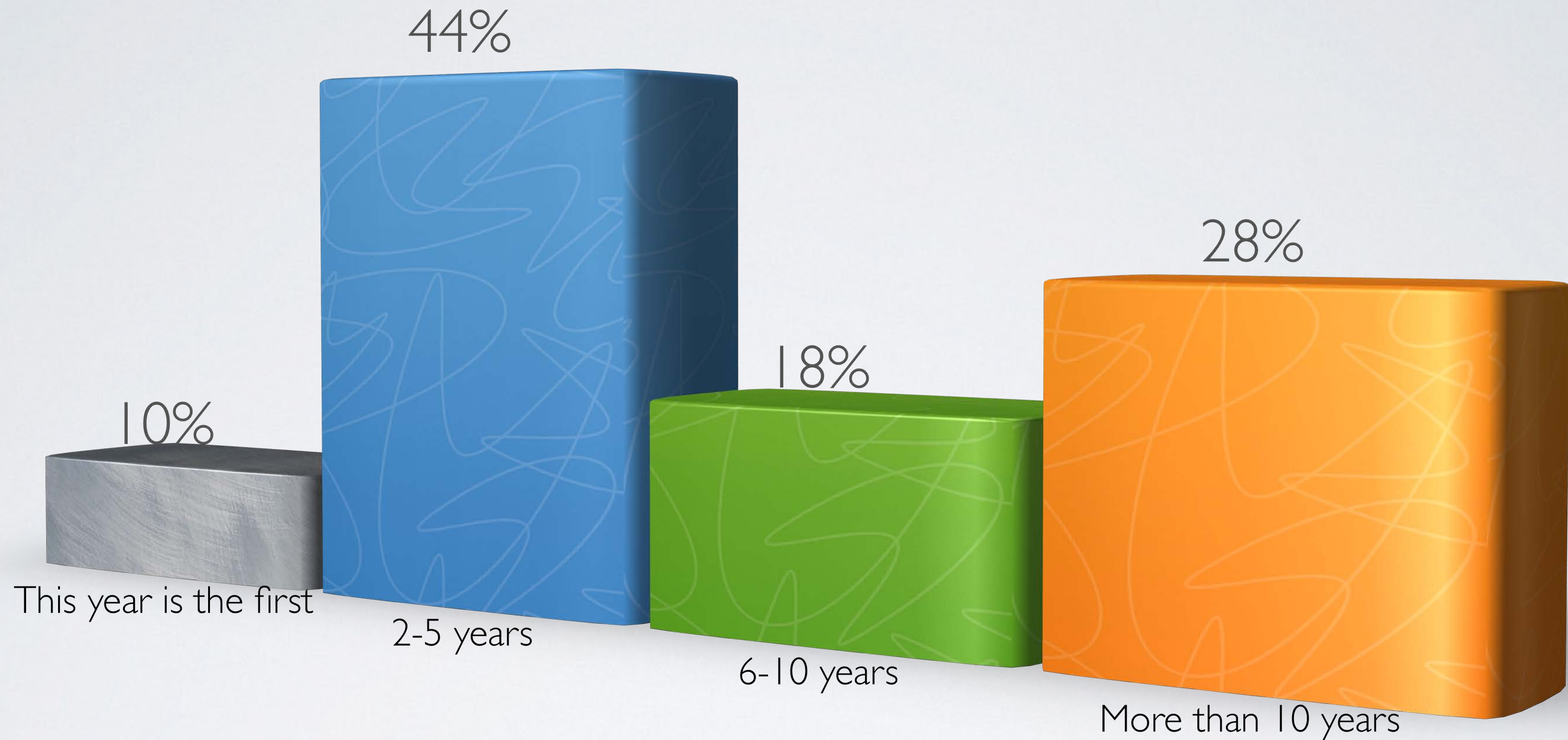
Among those that **do not buy** wild bird feed or feeders, half say that they **“just never have.”** This suggests that with **education and attraction**, an interest could develop in wild bird feeding, moving some of these to become purchasers.

CONVERTING



Indeed, **almost half** of non-purchasers say that they **might purchase** wild bird feed in the future.

WILD BIRD FEEDING IS FOR LIFE



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 Newsweek, Time, Money,

automotive, parenting/baby,

computer sciences, travel publications

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

Easy Chic

[Brand L] customers crave the latest and greatest, except in technology. They seek self-improvement, if it’s fun and convenient.



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

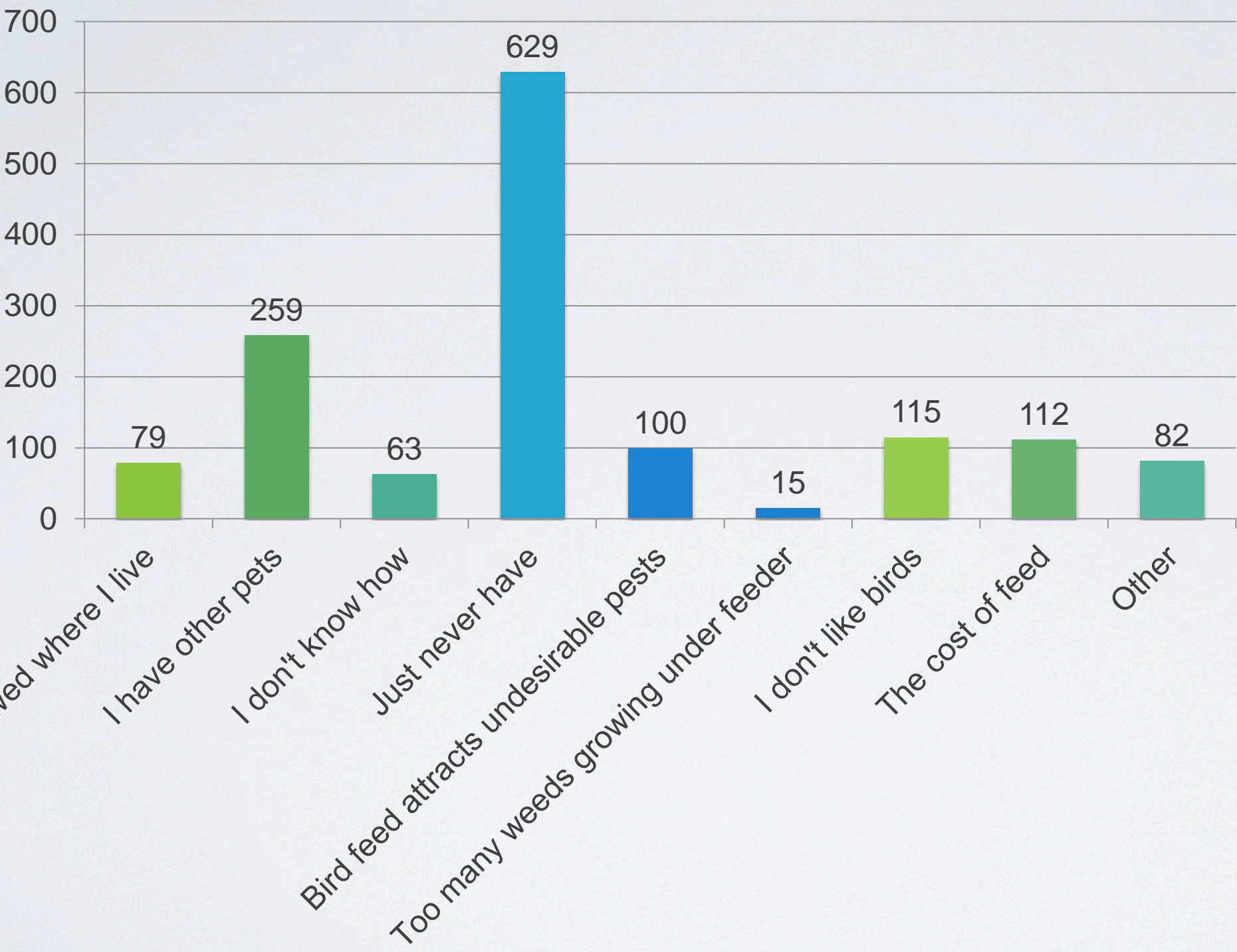
Shops quality with convenience

Shops at Avon, Zappos, AM PM mini market, Zazzle.com, Costco, Kmart, Cafepress.com, Amazon.com

Traditional hobbies, enjoys feathering the nest

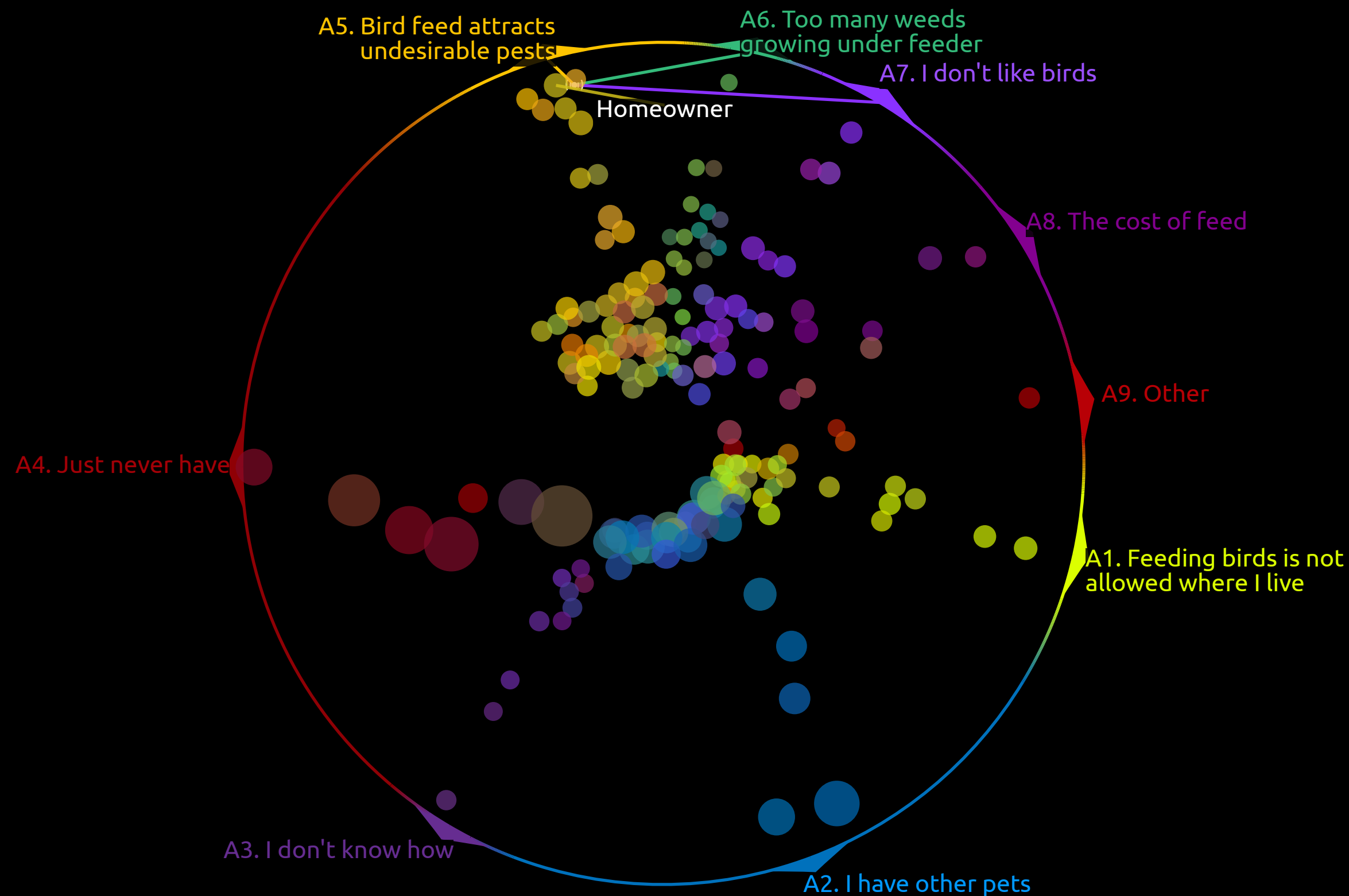
Stamp collector
Wood working hobbyist
Poetry writing hobbyist
Recent home improvement

2: Which of the following reasons describes why you never buy wild bird feed or feeders?



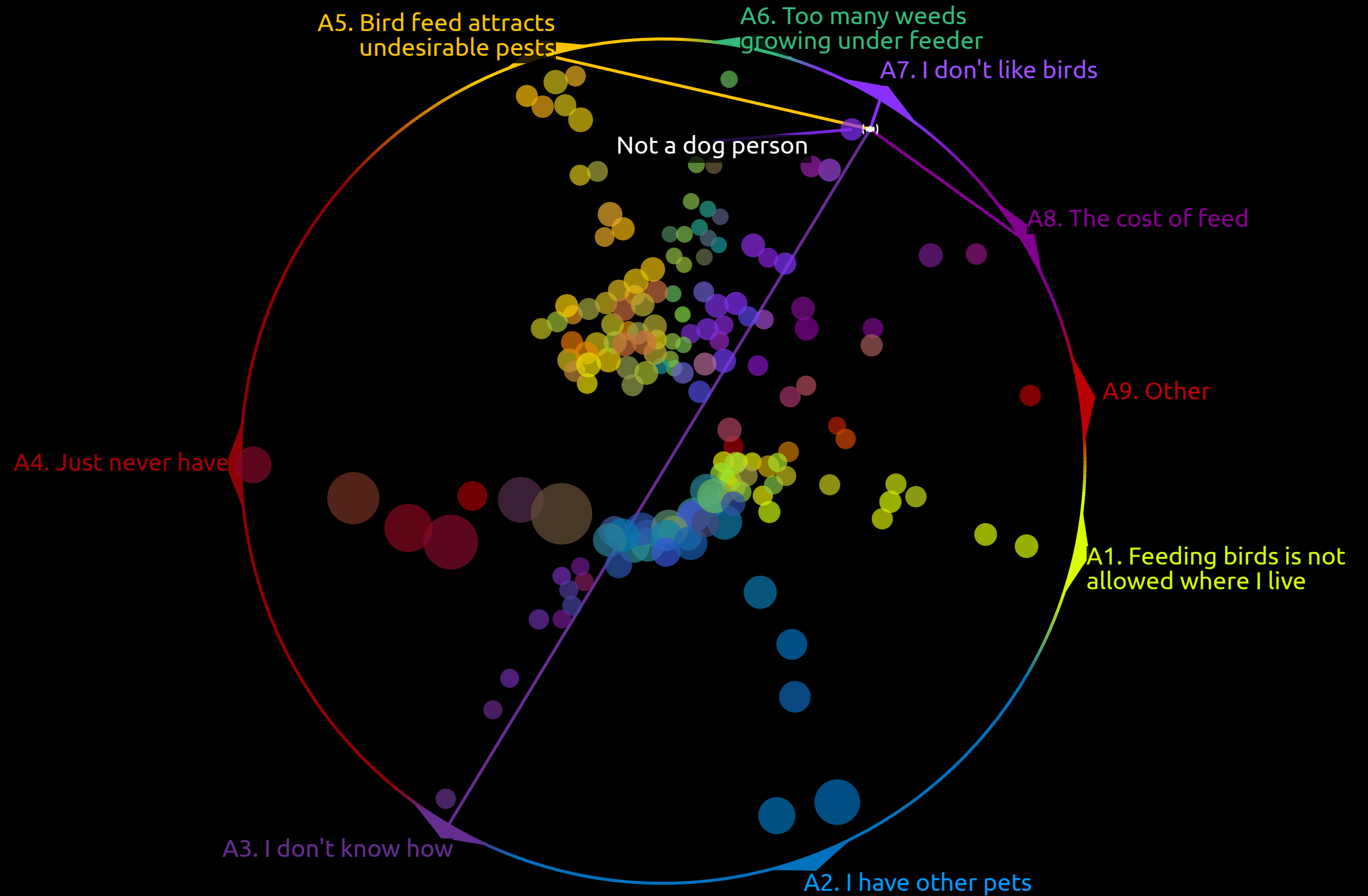
Answer	Resp. (1162)
A1: Feeding birds is not allowed where I live	6.7% (79)
A2: I have other pets	22.2% (259)
A3: I don't know how	5.4% (63)
A4: Just never have	54.1% (629)
A5: Bird feed attracts undesirable pests	8.6% (100)
A6: Too many weeds growing under feeder	1.2% (15)
A7: I don't like birds	9.8%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

Q2. Which of the following reasons describes why you never buy wild bird feed or feeders?



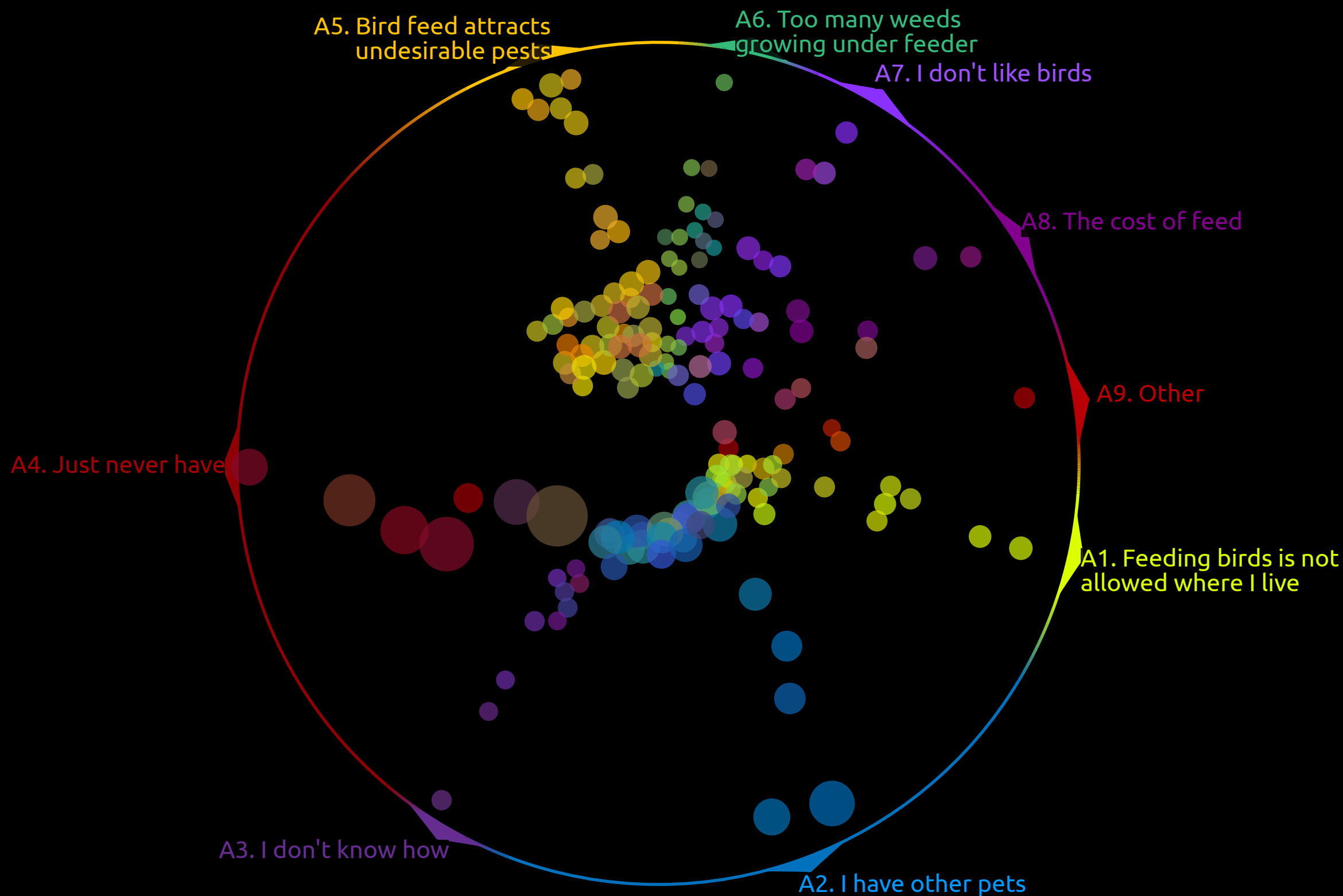
TOTALS:
Total survey responses: 1162
Total relevant tags (shown): 170
Total tags in the database: 2891

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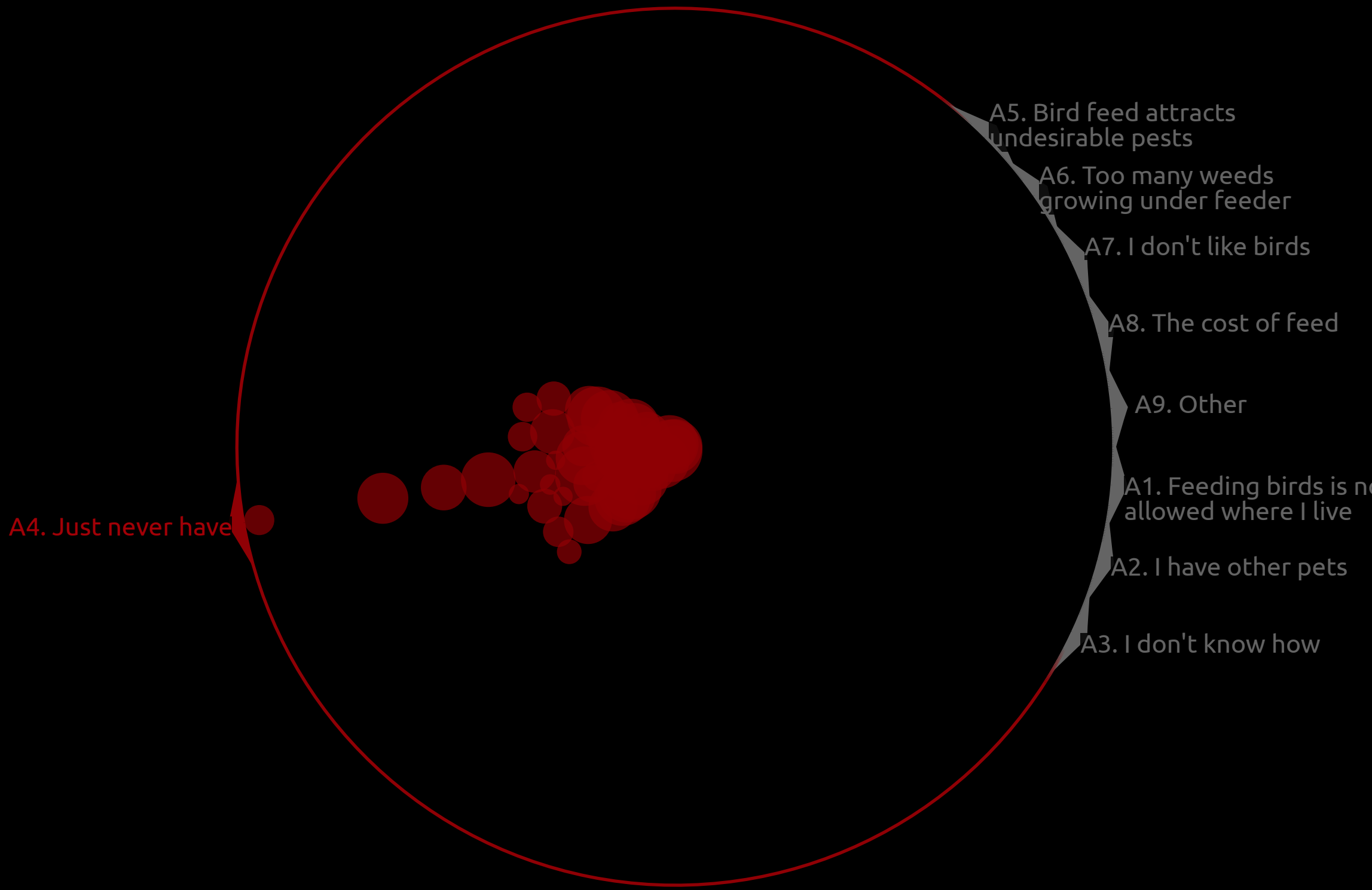
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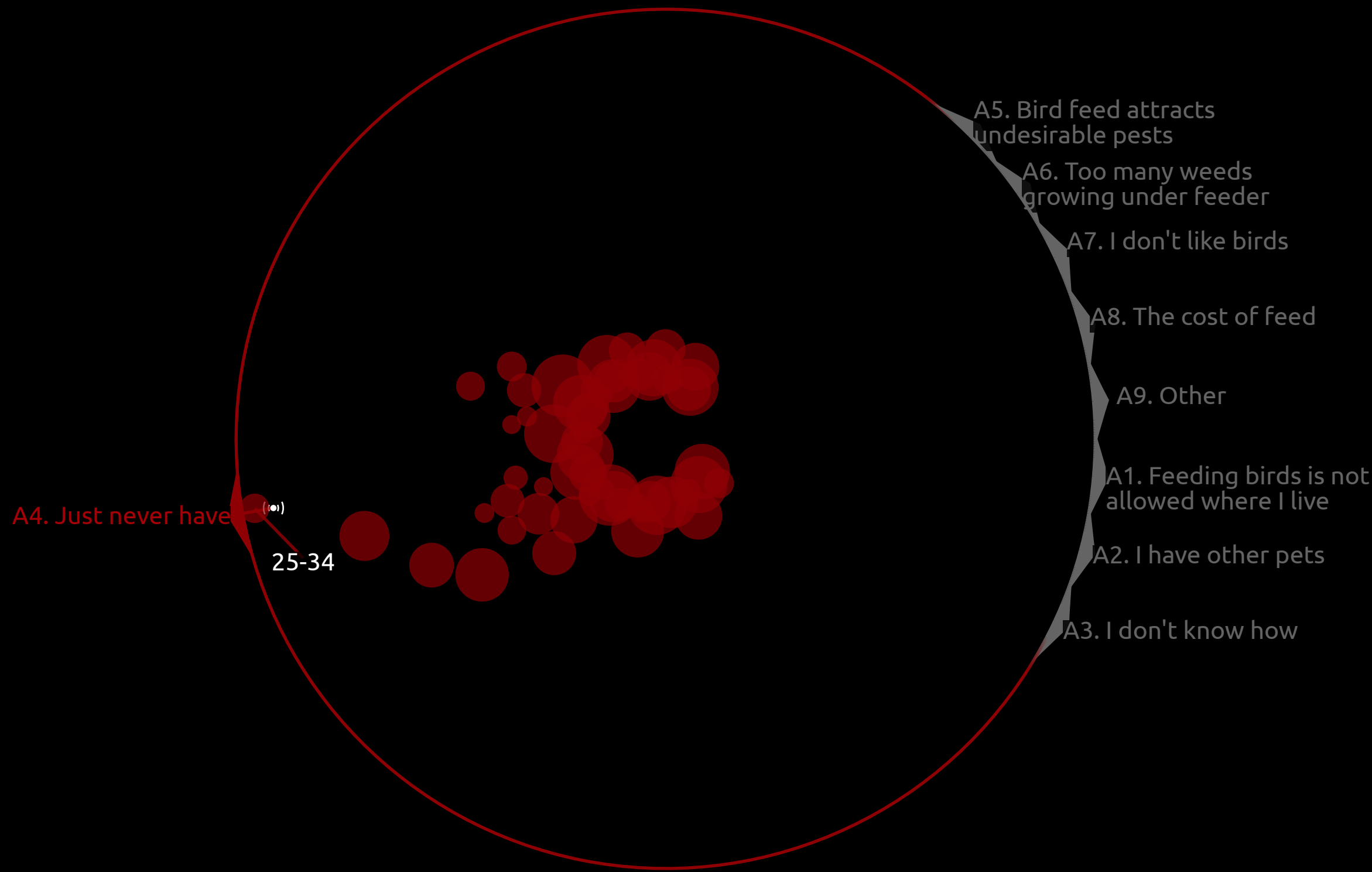
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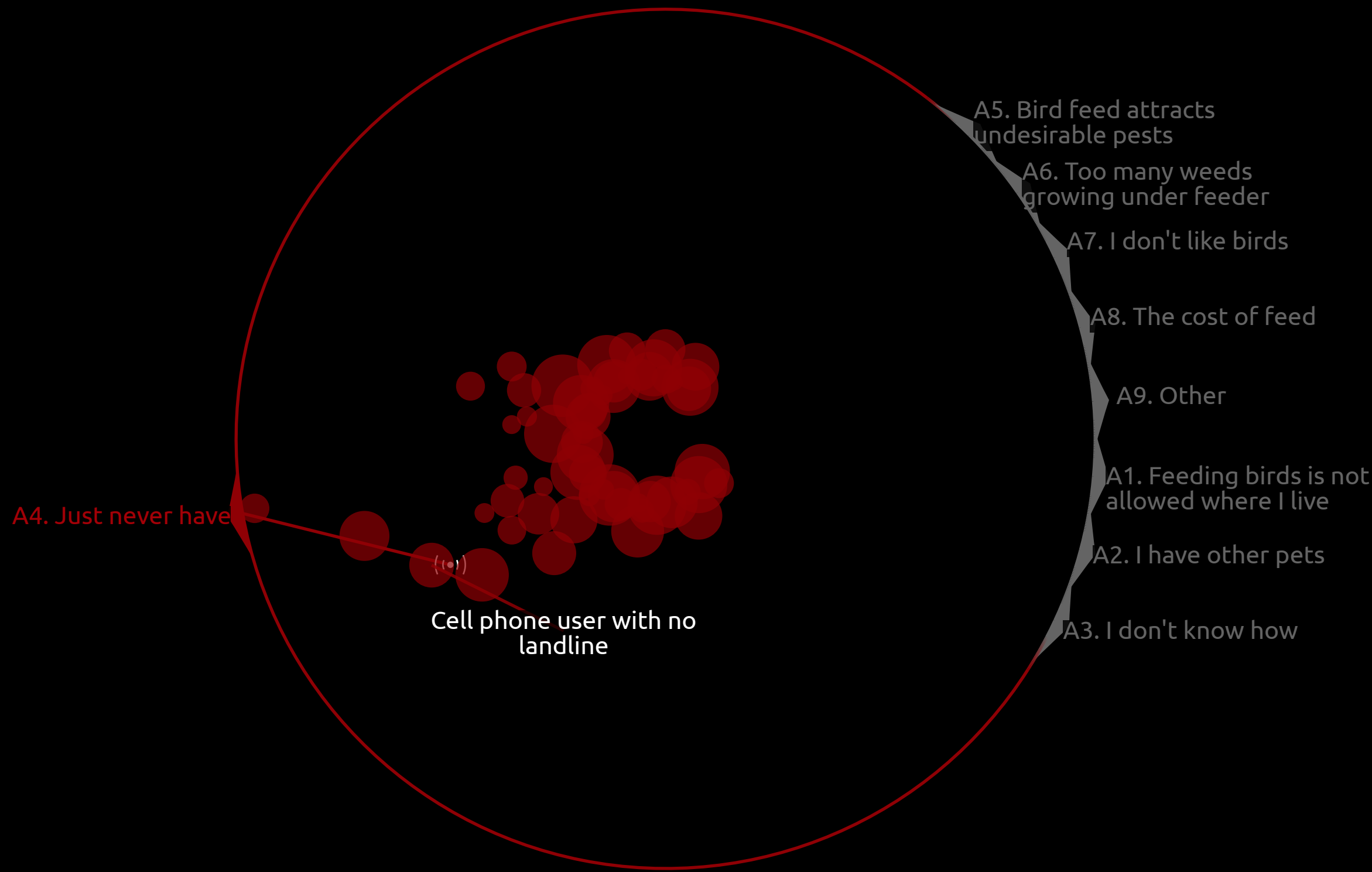
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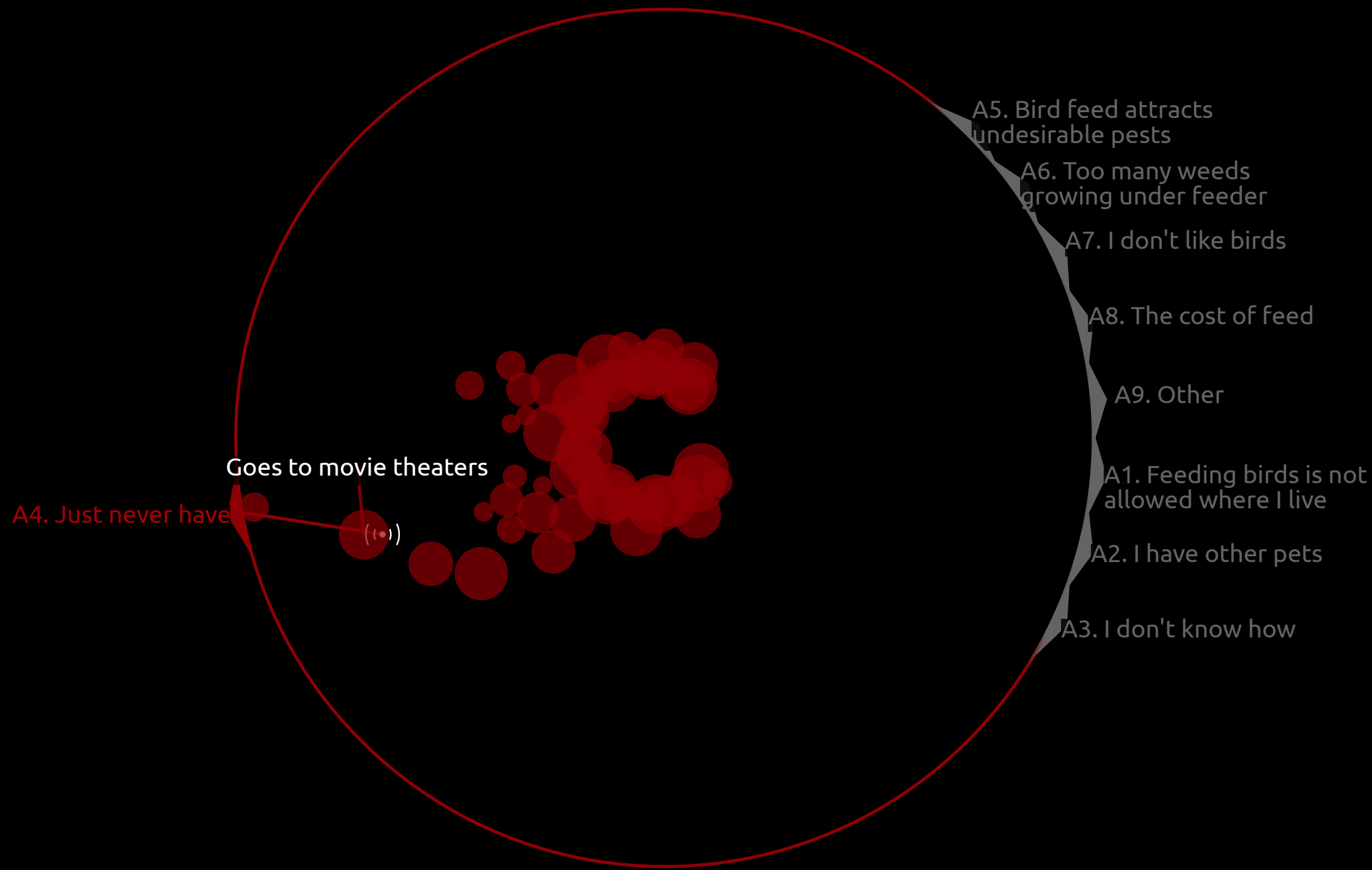
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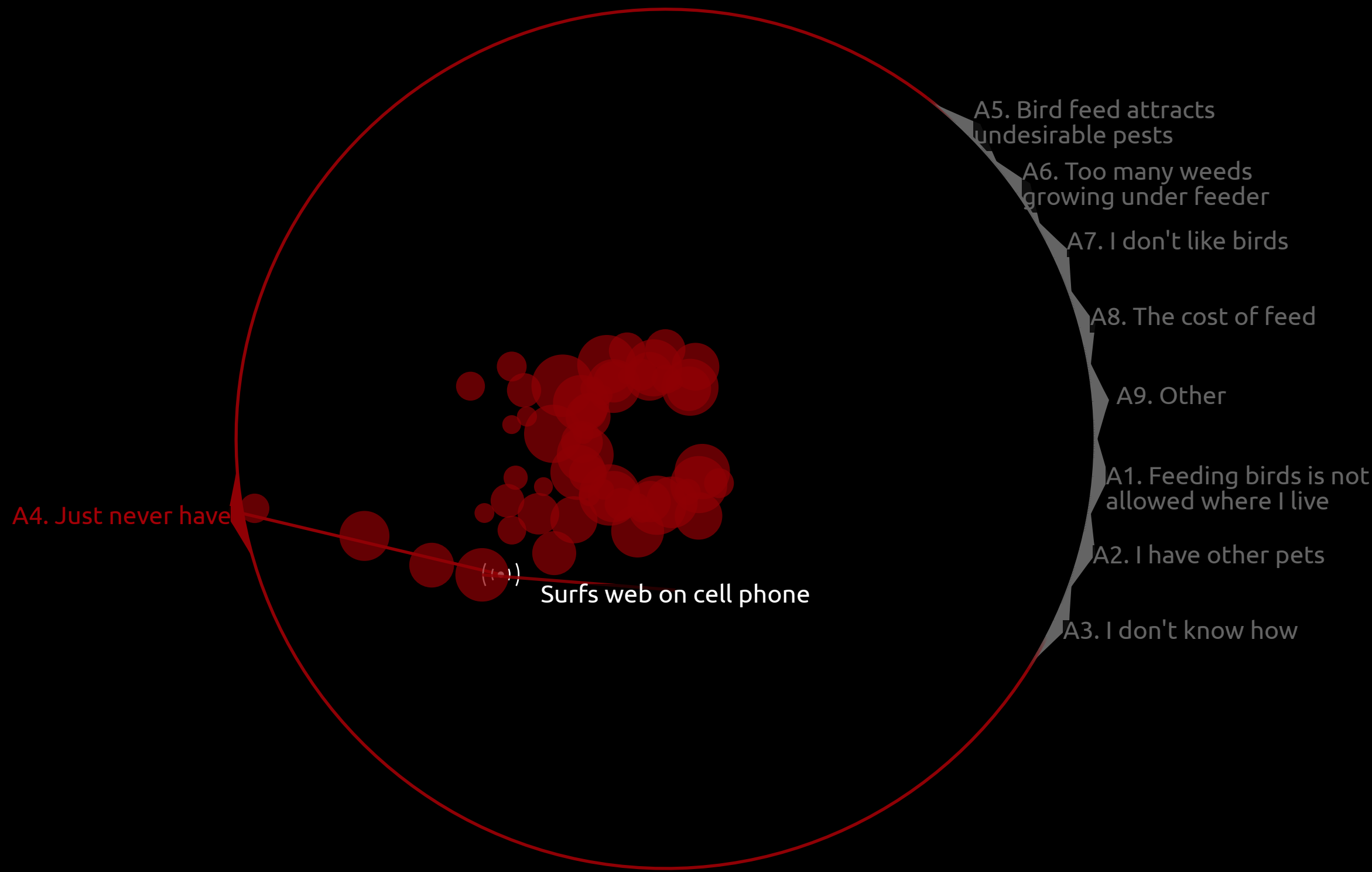
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8

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!



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415-364-8601

SUPPORT@AYTM.COM