2009 Statistics & Analysis

Which statistic changes are important?

Chuck Mattes

Statistics

- What products should we offer?

- Who will purchase them?

- Where do they purchase them?

- How should I promote them?

- What crops should I sell or grow?

- How many pounds should I produce?

- Is the market growing?

Roy Morgan Research

- Approximately 1,000 households complete 9 surveys a year
- Drop rate is low, consistent data
- The diary projects 5,000 households
- Statistically significant
  - Some areas borderline in detail

Mail Diary Survey

BIRD SEED (WILD) ALL MONTH PURCHASE

MEMBER #_____

How many bird feeders do you own? (Circle Number)

	1	2	3	4	5	
Tube:	1	2	3	4	5	More
Platform:	1	2	3	4	5	More
Hummingbird:	1	2	3	4	5	More
Hopper Style:	1	2	3	4	5	More
Suet:	1	2	3	4	5	More
Other:	1	2	3	4	5	More

Where was your bird feeder purchased?
(Use **OUTLET CODE LIST** below)

Outlet Type:_____ Outlet Code:_____

DATE	BRAND NAME	TYPE	PACKAGING						HOW FOUND OUT						#	SIZE	COST		OUTLET - WHERE		AGE & SEX				WHY PURCH. BRAND						ANNUAL LBS.

TYPE CODE LIST
- 01 All Purpose Mix (Economy)
- 03 Cracked Corn
- 04 Deluxe Premium Mix
- 07 Hummingbird Nectar
- 09 Nyjer (Thistle) Seed
- 10 Peanut Hearts
- 11 Safflower
- 13 Suet Cakes
- 02 Sunflower (Black Oil)
- 12 Sunflower (Striped)
- 06 Sunflower Hearts
- 15 Bird Bells/Cakes
- 16 Bird-Specific Mix
- 19 Other - Write In

OUTLET CODE LIST
- 1 Discount
- 2 Drug Store
- 3 Feed Store
- 4 Garden Center
- 5 Hardware Store
- 6 Home Improvement Center
- 7 Mail Order
- 8 Pet Supply
- 9 Supermarket
- X Wholesale Club
- Y Wild Bird Specialty Store
- 0 Other - Write In

BRAND CODE LIST
- 01 Audubon Birch
- 02 Audubon Park
- 48 Audubon Superior
- 27 Audubon Valley
- 03 Baymor
- 04 Caldwell
- 05 Cenex
- 06 Feathered Friend (Agway)
- 07 Feeders Select
- 08 High Energy
- 09 K-Mart
- 10 Kaytee
- 11 Kellogg
- 12 L&M
- 13 Lyric
- 53 Morning Song
- 14 Pennington
- 18 Southern States
- 21 3-D
- 22 Wagner's
- 23 Wild Bird Chow
- 24 Wild Delight
- 26 No Brand Listed
- 28 Store Brand
- 29 Other - Write In

Data Reported

- Data is available to members of the WBFI and can be found in the members section of the site

- Presentation is a sample of what data you can view and use for your business

- **Other data is available-what do you need?**

2009 Comments Issues

- 2006 US Fish & Wildlife Data link
- Age of Purchaser vs. age of Homemaker
  - Who is the real target, the buyer or the person telling them what to buy
  - Showed up in Deluxe Mix seed purchasers
- Size and reliability of sample size data in smaller sub-categories
  - Some are too small to be significant
  - Some categories have few responses and vary wildly year to year
- No more November Data-May only
  - This is my interpretation of what is important

Where do they live?

Urban vs. Suburban vs. Rural

Urban
20.1%

No answer
11.2%

Rural
23.6%
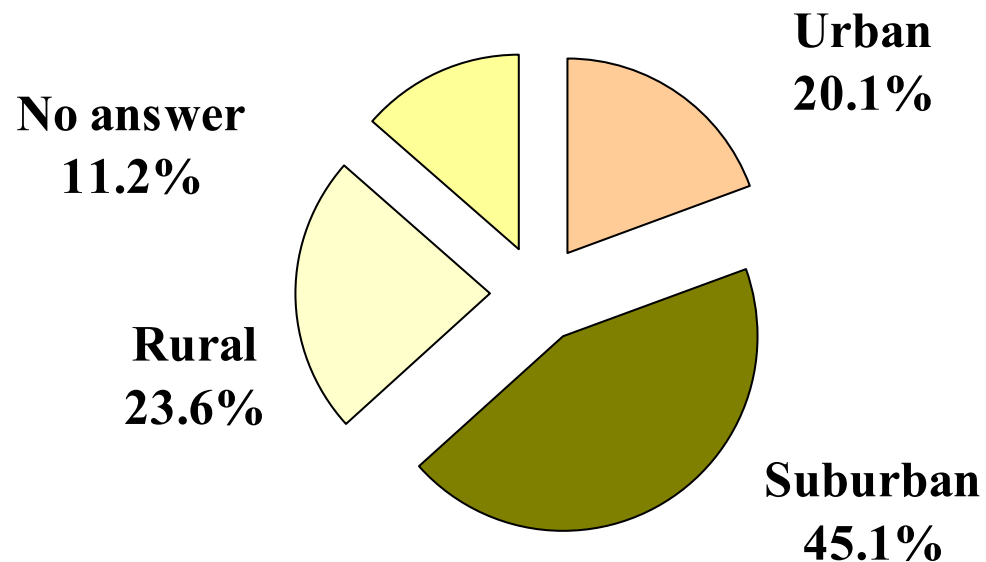
Suburban
45.1%

Change of +7% in Suburban

Male vs. Female

Male 23.7%

Female 74.1%

Change of +4.5% in Females

What is their education level?

No Answer Elementary
0.0%   0.0%

**College
57.1%**

**High
School
42.9%**

What is their age range?

Age of Purchaser

8.0%

13.0%

26.9%

22.7%

25.0%

☐ Under 34 ☐ 35-44 ☐ 45-54 ☐ 55-64 ☐ 65 & over
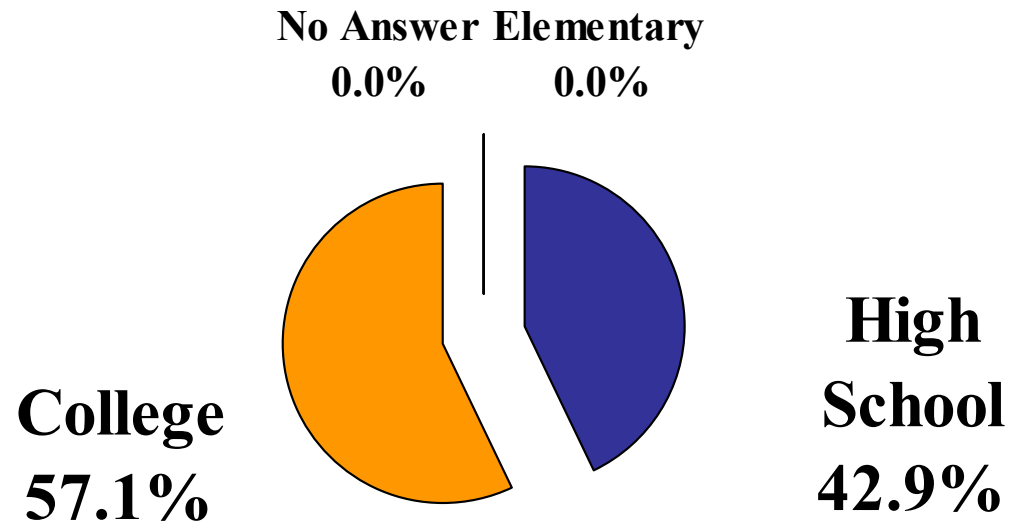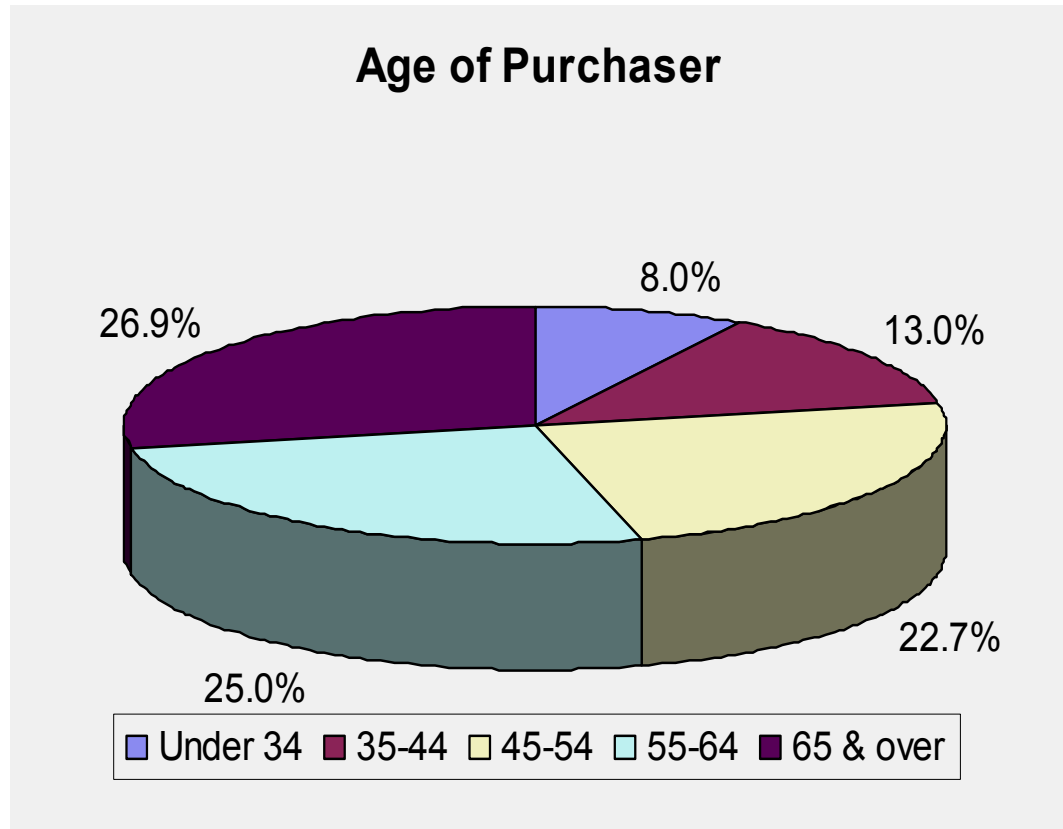
Shifting Older

Purchaser vs. Homemaker

Age of Homemaker

12.1%

26.4%

61.2%

Under 35   35-49   50 + older
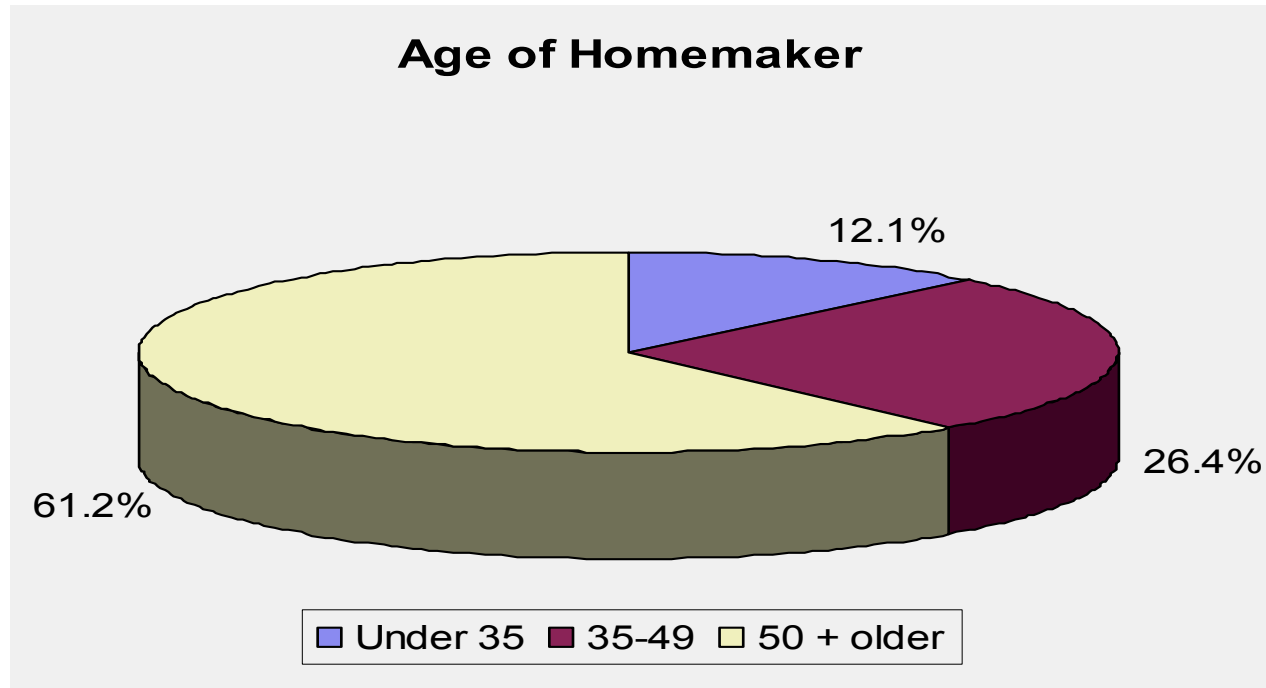
How many units do they purchase?
What do they spend?
How many pounds do they buy?

Households Participating/Units Purchased/ #'s Purchased/$$ Spent

May 2009

Report	# Households	Units	Pounds	$$$
May 02	500	1,509	16,557	4,813
May 03	510	996	15,624	4,784
May 04	519	984	15,384	4,699
May 05	615	1,009	14,521	4,947
May 06	444	693	11,812	3,783
May 07	453	771	12,726	4,181
May 08	498	763	11,589	5,090
May 09	436	763	9,732	4,849

Households -14.2%   Units 0.0%   Pounds -19.1% $$$ -5.0%

What mixes or straight ingredients do they buy?

Purchases by Units

May 2009

	2002	2003	2004	2005	2006	2007	2008	2009	08-09Δ
Units Purchased	1,059	996	984	1,009	693	771	763	763	0.0%
All Purpose Mix	36.2%	46.6%	43.7%	44.9%	48.1%	50.6%	46.6%	51.7%	+9.8%
Oil Sunflower	14.6%	10.8%	10.9%	8.8%	11.3%	10.3%	16.1%	12.4%	-29.8%
Suet Cakes	7.5%	2.8%	6.0%	12.5%	6.6%	3.5%	5.0%	12.4%	+59.7%
Deluxe Mix	7.3%	7.4%	12.9%	5.9%	10.5%	12.4%	6.2%	4.9%	-26.5%
Nyjer	6.3%	6.2%	5.7%	6.3%	4.7%	2.7%	2.5%	3.9%	+64.1%
Cracked Corn	3.2%	0.7%	1.5%	1.5%	0.3%	2.1%	1.8%	2.3%	+21.7%
Other	5.6%	7.1%	7.6%	8.1%	11.6%	7.4%	12.2%	3.0%	-400%
Safflower	0.5%	0.6%	1.6%	2.3%	0.8%	1.8%	0.0%	2.0%	NM
Hearts/Chips	0.5%	3.0%	0.8%	0.1%	0.4%	0.3%	0.4%	2.0%	+80.0%
Hummingbird Nectar	1.9%	2.8%	0.5%	1.7%	0.7%	1.0%	0.9%	0.6%	-50.0%
Striped Sunflower	1.0%	1.6%	2.6%	1.5%	0.3%	0.7%	0.7%	0.0%	NM
Bells/Cakes	6.9%	1.9%	1.0%	0.4%	0.4%	1.0%	0.4%	0.6%	+50.0%
Bird Specific	5.3%	6.2%	3.9%	4.9%	4.1%	3.9%	4.1%	3.1%	-32.2%
No Answer	3.2%	2.1%	1.3%	1.0%	0.2%	2.2%	2.6%	1.3%	-50.0%

Purchases by Pounds & Type
May 2009

	2002	2003	2004	2005	2006	2007	2008	2009	08-09Δ
Total ## Purchased	16,577	15,624	15,384	14,251	11,812	12,726	11,589	9,732	-19.1%
All Purpose Mix	48.7%	53.0%	48.3%	51.5%	54.6%	49.6%	44.6%	52.5%	+15.0%
Oil Sunflower	21.4%	17.3%	19.6%	15.5%	17.7%	14.9%	25.9%	21.7%	-19.4%
Suet Cakes	0.4%	0.2%	0.3%	0.9%	0.2%	0.2%	0.3%	0.5%	+40.0%
Deluxe Mix	7.4%	6.5%	12.5%	8.9%	11.5%	12.3%	9.2%	5.6%	-64.3%
Nyjer	4.0%	2.0%	2.6%	2.8%	2.3%	1.4%	1.3%	3.6%	+63.9%
Cracked Corn	1.5%	0.8%	2.6%	2.8%	0.1%	3.8%	1.8%	3.3%	+45.5%
Other	8.1%	5.5%	7.6%	9.0%	8.2%	6.8%	5.9%	3.6%	-38.1%
Safflower	0.2%	0.3%	0.5%	1.4%	0.4%	1.3%	0.0%	0.7%	NM
Hearts/Chips	1.7%	2.8%	0.6%	0.3%	0.6%	0.0%	0.7%	1.4%	+45.7%
Hummingbird Nectar	0.1%	0.1%	0.0%	0.4%	0.0%	1.1%	0.2%	5.6%	+2800%
Striped Sunflower	0.5%	2.0%	1.9%	2.6%	0.3%	1.0%	0.4%	0.0%	NM
Bells/Cakes	0.2%	0.0%	0.1%	0.1%	0.0%	0.1%	0.0%	0.3%	NM
Bird Specific	5.8%	7.0%	2.8%	3.5%	3.8%	2.6%	6.7%	5.0%	-34.0%
No Answer	0.0%	2.5%	0.6%	0.2%	0.3%	4.9%	3.1%	1.6%	-51.6%

Pounds Purchased per Year
May 2009

22.1%

27.1%

13.9%

15.8%

20.9%

■ <25 lbs	■ 26-<50 lbs.	■ 51 - <100 lbs.	■ 101 - <200 lbs.	■ 200+ lbs

How do they make their purchase decisions?

How purchase decision was made

May 2009

- Buy Regularly   44.9%
- Saw in Store   41.0%
- Newspapers   6.7%

Where do they buy, what retail outlet?

Where purchased?

May 2009

	2002	2003	2004	2005	2006	2007	2008	2009	08-09Δ
Units Purchased	1,059	996	984	1,009	693	771	763	763	0.0%
Discount	47.6%	40.2%	43.0%	31.1%	35.9%	33.7%	21.2%	18.7%	-13.3%
Supermarket	12.1%	21.5%	16.1%	14.1%	13.5%	19.0%	19.9%	21.9%	+9.1%
Feed Store	9.9%	7.9%	7.7%	6.3%	8.8%	10.1%	6.6%	7.0%	+5.7%
Hardware	4.8%	3.2%	4.8%	3.8%	7.4%	6.3%	3.4%	4.4%	+22.7%
Garden Center	1.7%	5.0%	6.7%	3.9%	4.6%	2.4%	4.1%	3.9%	-5.1%
Other	6.0%	1.9%	3.9%	17.6%	11.6%	8.7%	11.5%	11.9%	+3.4%
Home Improvement	4.1%	6.3%	8.4%	10.2%	6.4%	8.6%	6.0%	9.6%	+37.5%
Drug Store	4.3%	3.4%	2.5%	1.4%	5.3%	3.8%	1.3%	0.7%	-46.2%
Wholesale Club	3.3%	1.2%	1.4%	4.9%	0.3%	3.9%	0.5%	2.3%	+78.2%
No Answer	0.8%	0.8%	0.4%	1.9%	0.2%	0.4%	16.9%	12.6%	-34.1%
Pet Supply	2.8%	6.0%	2.9%	3.6%	4.8%	1.4%	4.0%	3.0%	-33.3%
Mail Order	0.1%	0.5%	1.4%	0.4%	0.2%	0.2%	0.2%	0.5%	+60.0%
Bird Specialty Store	1.0%	2.3%	0.7%	1.2%	0.9%	1.5%	2.2%	1.0%	-54.5%

Conclusions

- May 2009
  - Households down 14.2% over 2008
  - Units flat & pounds down 19.1%
  - $$$ purchases down only 5%
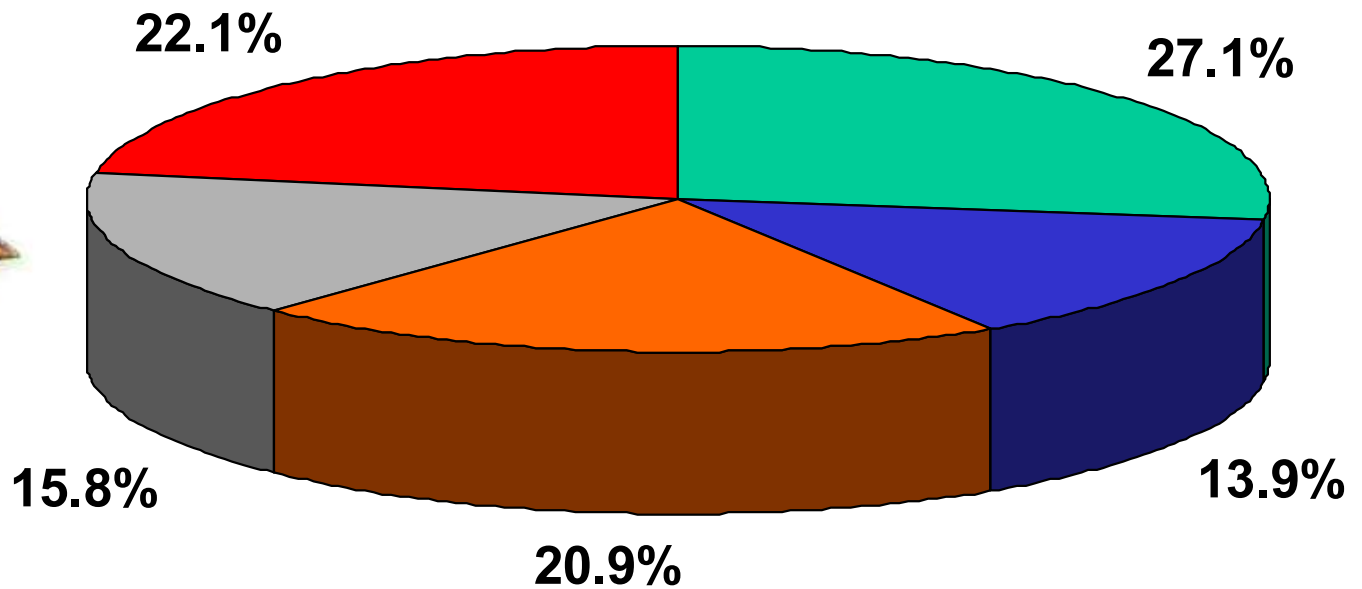
- Retailers-Supermarkets #1
  - Discount, other, no answer issues, Home Centers up, drug out of bird?

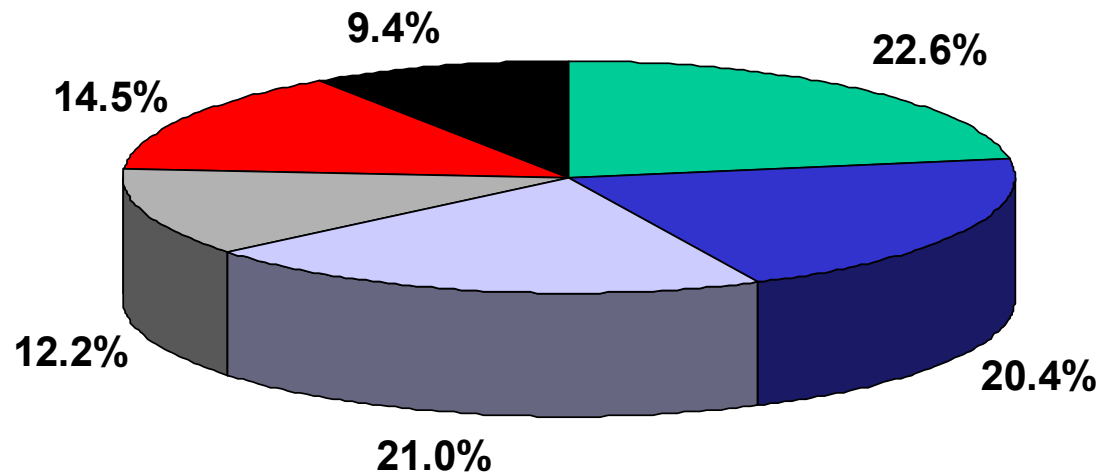# Feeder Data

Feeders

- Great News-From May 05 to May 08
  - Household owning feeders up 72.4%
  - All types/categories are up
    - Hummingbird   +86.5%
    - Hopper   +61.6%
    - Suet   +47.6%
    - Tube   +32.8%
    - Platform   +15.9%
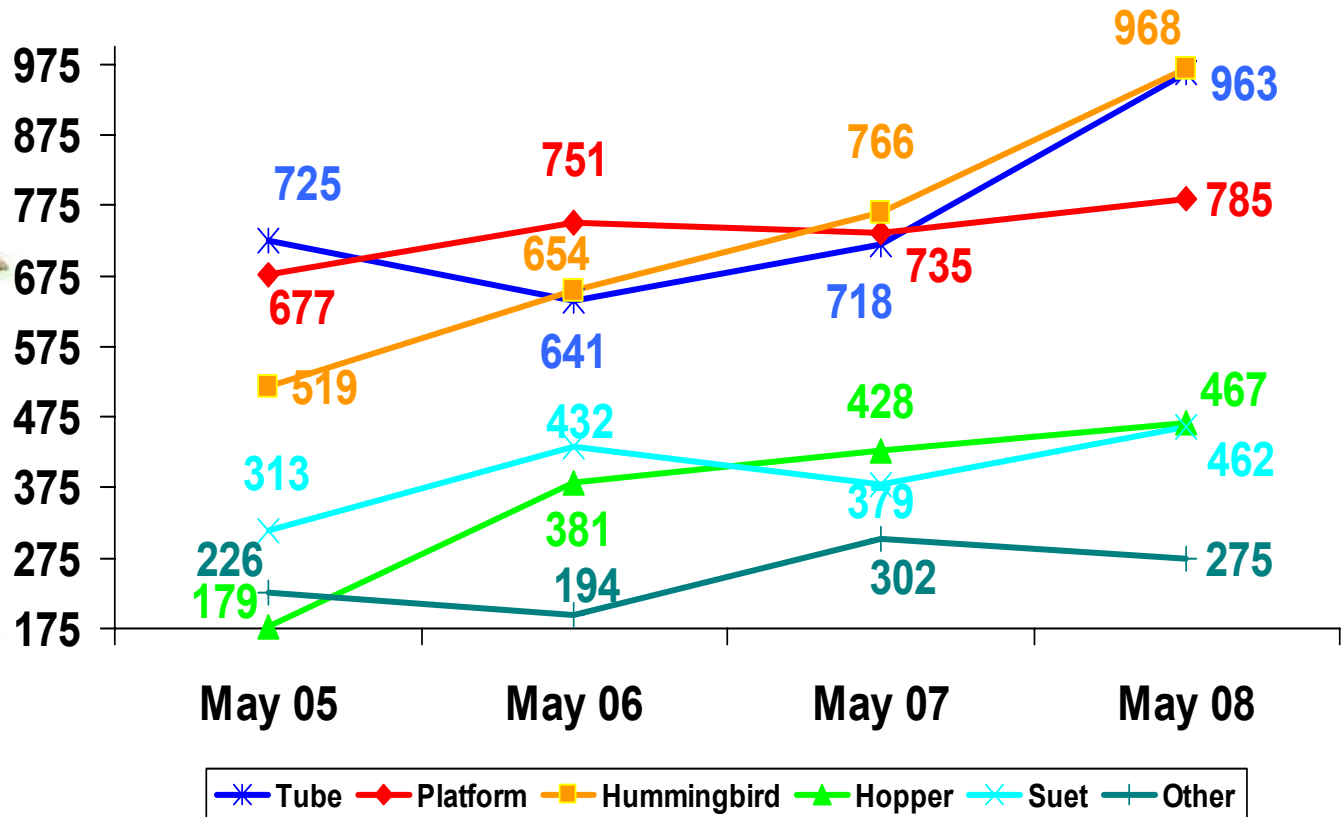   - Own 1+ feeders   +48.5%
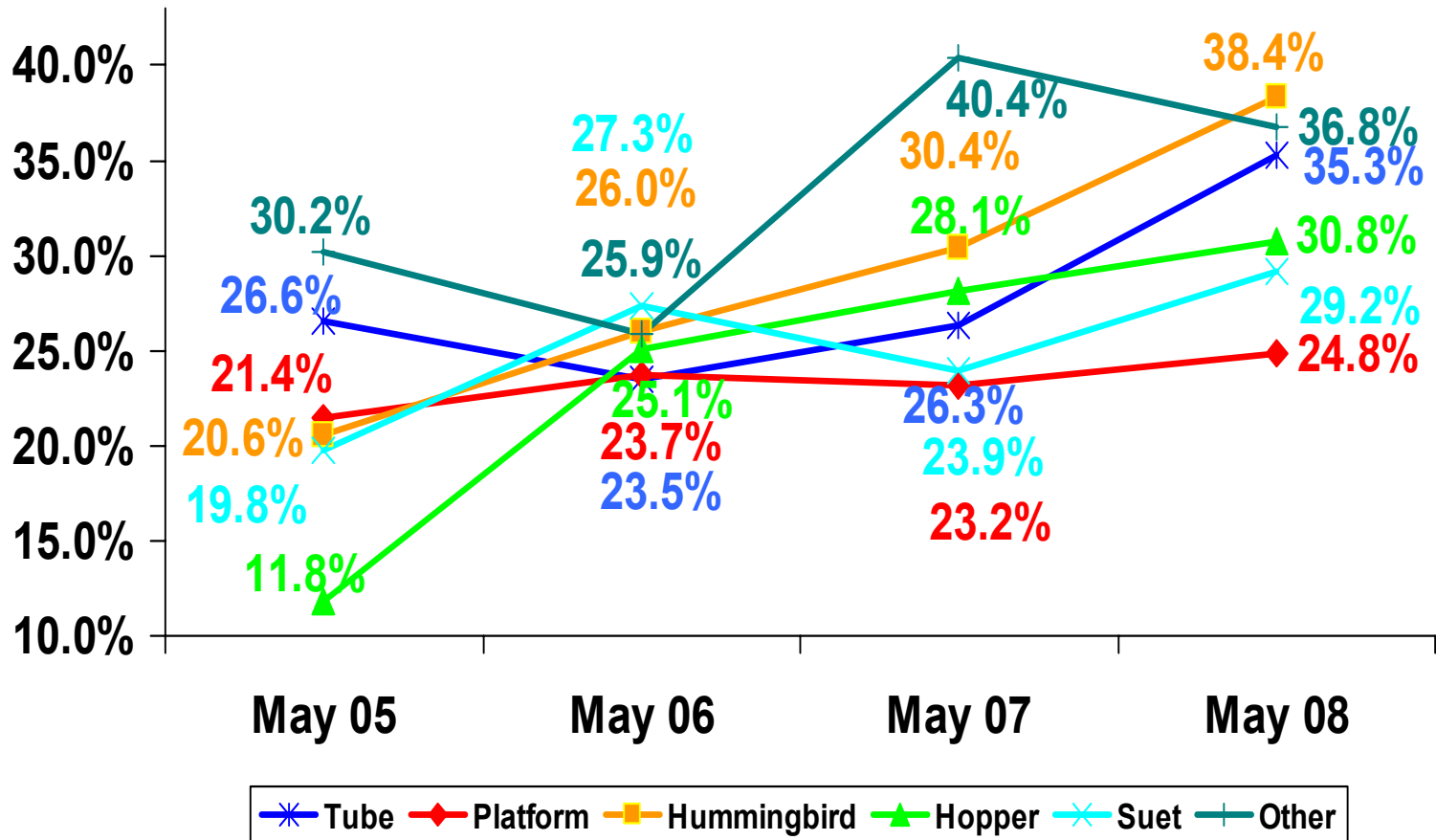- Bad news-only 27% filled this out in 2009

Feeders Owned
May 2009

Pie chart with segments:
- 22.6%
- 20.4%
- 21.0%
- 12.2%
- 14.5%
- 9.4%

Legend: ■ Tube ■ Platform ■ Hummingbird ■ Hopper Style ■ Suet ■ Other

of Feeders

- Good News-From May 05 to May 09
  - Household owning feeders +41.7%
  - Numbers owned by household
    - One   +48.1%
    - Two   +26.2%
    - Three   +20.6%
    - Four   -92.4%
    - Five   +50.6%
    - Six or more -5.5%

Questions?

Thank you