



**RESEARCH
FOUNDATION**

Wild Bird Feeding Attitudes / Awareness / Usage and Messaging

February 2018

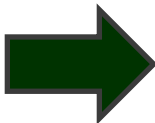
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Understand consumers' attitudes toward and behaviors in the wild bird feeding category

Determine the extent to which alternative messaging strategies motivate targets to begin / increase wild bird feeding involvement



Prospects

- Lapsed Customers**
- Low / Moderate Customers**
- Highly Involved Customers**



Methodology

- Women and men 21 to 70 years of age were interviewed
- Total n=750 (387 women; 363 men)
- Interviews were completed among four segments: Prospects (n=200); Lapsed Customers (n=150); Low / Moderate Customers (n=200); and Highly Involved Customers (n=200)
- Quotas were established to ensure the segments represented their demographics within the U.S. population

Sample



- Data were collected online utilizing a national panel
- Fielded January 3 through January 17, 2018
- Weinstein & Associates, Inc., an independent consumer insights company, was commissioned to conduct the study

Fieldwork



- **Prospects**—Never participated in wild bird feeding but have neutral or positive intent to participate in the future
- **Lapsed Customers**—Participated in wild bird feeding in the past but do not currently, i.e., within the past 2 years but not within the past 12 months. Do not show the highest levels of enthusiasm and commitment to wild bird feeding
- **Low / Moderate Customers**—Currently feed wild birds (within the past 12 months); buy wild bird feed 1 to 5 times a year. Do not show the highest levels of enthusiasm and commitment to wild bird feeding
- **Highly Involved Customers**—Currently feed wild birds (within the past 2 months); buy wild bird feed once every other month or more often. Show the highest levels of enthusiasm and commitment to wild bird feeding

Segment Definitions



Executive Summary

- **One in three adult Americans is a viable target for the Wild Bird Feeding Industry.**
 - 10% are currently engaged in wild bird feeding to some extent, with one-quarter of these consumers having entered the activity within the past 2 years.
 - An additional 3% have participated in the past 2 years but not within the past year and would be targeted for re-engagement (i.e., Lapsed Customers).
 - 22% claim interest in the activity but are not currently involved.
- **Customers (i.e., Current and Lapsed Customers) claimed personal relationships was their primary information source when first engaging in wild bird feeding. Highly Involved Customers utilized a far broader array of resources than their counterparts.**
 - Beyond family and friends, Customers deem online and retail experts, and information on-pack best sources.
 - A notable proportion did not initially research the activity at all, with Low/Moderate Customers least apt.
- **Unlike those already wild bird feeding, almost all Prospects stated they would conduct research prior to their involvement. They are significantly less likely to seek out knowledge from their family and social circle, opting instead for online resources as well as in-store personnel at non-specialty retail.**
- **When first looking to educate themselves, consumers query a broad spectrum of issues, with no one particular subject standing out. Customers felt the information sought was moderately easy to find.**
 - Once engaged, continuing education falls off significantly except among Highly Involved Customers.
- **As may be expected, Highly Involved Customers most strongly embrace all the benefits/rewards of wild bird feeding.**
- **Customers and Prospects alike are moved by the beauty and connection with nature wild bird feeding provides, with Customers also spurred by the entertainment value of wild bird watching. There is an element of nurturance as well for all segments.**
- **Low/Moderate and Highly Involved Customers connect wild bird feeding more strongly with their love for gardening and how wild birds further enhance the beauty of their garden/personal space.**
- **Prospects distinguish themselves as notably motivated by the positive contribution they can make on the environment through wild bird feeding.**

Executive Summary (cont'd)

- **It follows that the messaging platforms that consistently perform the strongest are Beauty/Sensory and Independence, which together embody the top motivators identified for wild bird feeding participation to experience and connect with nature and its inherent beauty.**
 - In alignment with their heightened sense to care for the environment, *Prospects* connected more strongly with the Idealism messaging than did *Lapsed* and *Low/Moderate Customers*, but suggested it be toned down.
- **The only strong objection Highly Involved Customers have is the guilt they feel if their feeders don't stay filled.**
 - Nuisance squirrels are a secondary barrier.
- **Low/Moderate Customers do not express high negativity toward any one aspect of wild bird feeding. Like Highly Involved Customers, but to a lesser degree, they feel guilty if their feeders run out.**
- **The majority of Prospects admit they have never thought about participating in wild bird feeding prior to the survey, although once presented with the idea, they have positive/neutral thoughts about it. They are devoid of knowledge regarding the activity, realizing they have to invest time to learn; importantly how to attract the wild birds they would like to see. However, some seem unsure where to turn for the information.**
 - Some do question whether feeding is good for wild birds, and the potential attraction of unwanted wildlife and mess created by feeders make some hesitate. There is notable concern about the time investment required and adequate storage space for feed.
- **Despite the beauty, connection with nature and entertainment value derived from wild bird feeding, Lapsed Customers have abandoned the activity, although not without giving it a fair trial with 44% involved for 3 years+. With other demands on their time, the benefits did not outweigh the constant task of filling empty feeders which often are a result of nuisance animals rather than wild birds. To compound the issue, this segment is less likely than others to feel feeder provisions help wild birds during times of food scarcity.**
- **As may be expected, the more involved one becomes in wild bird feeding, the more feeders they own. The great majority of *Lapsed Customers* own 1 feeder, *Low/Moderate Customers* average 2-3 feeders and *Highly Involved Customers* have 4 to 5 feeders, on average.**
 - Their first foray into wild bird feeding is typically a seed feeder, although approximately 1 in 5 start off with a nectar feeder. *Prospects* project they would mirror this behavior.
 - As *Customers* become more involved, they tend to diversify the types of feeders they own. Nectar feeders gain more from this behavior than suet. Rarely does someone own only suet feeders.

Executive Summary (cont'd)

- When shopping for a first feeder and feed, *Prospects* would strongly focus on Specialty; online and brick & mortar. *Customers* did not embrace this channel as strongly when they went shopping and made their initial purchase. *Lapsed* and *Low/Moderate Customers* opted for home improvement and/or mass merchandise stores most often, while *Highly Involved Customers* frequented a broad spectrum of sources and selectively made a purchase across the array.
- *Customers* and *Prospects* alike focused on the ease with which a feeder can be refilled and price when selecting their first feeder.
 - *Highly Involved Customers* also placed emphasis on feeder durability and the ability to feed multiple birds simultaneously. *Low/Moderate Customers* claimed secondary consideration for the feeder's aesthetics and its ability to feed several birds at a time.
 - *Prospects* add to their list of top criteria durability, weather resistance, ease of cleaning, the feeder's ability to deter nuisance animals, and product recommendations made by sales personnel and/or online. Secondary attributes include the ability to feed several birds at one time and minimize mess, with a notable 20% stating they would want a feeder suitable for limited space.
- Price is a key feed selection criterion for all segments when making an initial purchase, although *Highly Involved Customers* give it less weight than do others, holding the feed's ability to attract a variety of desirable birds equally important. *Prospects* would also strongly consider recommendations.
- When adding feeders, approximately half of *Lapsed* and *Low/Moderate Customers* bought at a new outlet. They continued to buy strongly from home improvement and mass, but also made a notable move into gardening centers. *Highly Involved Customers* continued to source their feeders from several channels, with most having purchased at one or more new outlets. They gave the biggest boost to home improvement stores. They also utilized Specialty more fully; online and in-store.
 - *Customers'* motivations to buy through a new source centered on location convenience and broader selection. *Highly Involved Customers'* were further prompted by their higher expectations and their initial outlet's inability to fulfill that need.

Executive Summary (cont'd)

- **Mirroring feeders, as wild bird feeding involvement deepens, *Customers* stretch more actively into different varieties and/or types of feed; from 22% of *Lapsed Customers* to 42% of *Low/Moderates* to a high 64% among *Highly Involved Customers*.**
 - When buying different feed, the majority of *Lapsed* and *Low/Moderate Customers* ventured to new sources, primarily motivated by location convenience. As with feeders, home improvement and mass remained strong channels. *Low/Moderate Customers* notably added local hardware into the mix, while *Lapsed Customers* spread out more extensively into gardening centers, farm supply and grocery.
 - Almost all *Highly Involved Customers* buying different feed tried one or more new sources. Their array remained broad with home improvement and online/in-store Specialty greatly benefitting from their quest for larger variety and better quality feed.

Implications

- Strong opportunities exist to expand wild bird feeding engagement.
- Customers leaning more heavily on personal relationships to initially learn about wild bird feeding may imply that Prospects are less likely to have family or friends currently involved in the activity who may set an example, inform and/or persuade their involvement. Ways in which to create awareness among and impart knowledge to target Prospects should be sought.
- Active initial research seems to be an indicator for deeper involvement long-term. Lapsed and Low/Moderate Customers are more passive about their engagement while Highly Involved Customers initialize and continue their quest to learn about wild bird feeding.
- Ways in which wild bird feeding, feed and feeder subject matter may be more readily found should be pursued, including SEO. There are indications that information is not as easily sourced as desired.
- Company websites should be viewed as a key resource to disseminate information beyond product, promoting the values and rewards of wild bird feeding through commentary, personal interest stories and the like. Consideration may be given to engaging online bloggers as ambassadors, reaching out to Prospects to generate awareness and intrigue.
- Highly Involved Customers are fully engaged and open to learning more. Their thirst for knowledge is not the overriding factor. Rather, it is means through which they can heighten the pleasure they experience when they successfully attract wild birds and observe the beauty and wonder of nature.
- Low/Moderate Customers are not dissimilar from Highly Involved Customers and do not have any major barriers to deeper involvement. It seems they simply lack the self-motivation and deeper emotional connection that Highly Involved Customers have tapped into.
 - For both Customer segments, stronger engagement may be promoted through messaging of beauty, connection with nature and nurturance. Consideration may be given to seasonal tie-ins with gardening ... promoting the enhanced beauty wild birds bring in-season, and the continued beauty they deliver when gardens lie dormant.
- Although Lapsed Customers are similarly motivated by the connection with beauty and nature, they have tired from combatting unwanted wild life, and the physical and time pressures placed on them to constantly refill feeders.
- To address issues consistently voiced across all Customer segments, product solutions that reduce the frequency of feeder refills and remedy nuisance wild life, particularly squirrels, should be pursued.

Implications (cont'd)

- When generating awareness about wild bird feeding among Prospects, the message of beauty, connection with nature and nurturance ... not only for wild birds but for the environment as well, should be imparted as a call to action. Given their motivation to have a positive impact on nature and the environment, their concerns about whether wild bird feeding is healthy should be addressed head-on to alleviate this hurdle. With no category knowledge and limited, if any, personal reference but a willingness to learn, it is imperative the basics be readily accessible and concisely communicated online, in-store and on-pack.
 - Developing and/or promoting **complete** starter kits may convert some Prospects. [NOTE: we attempted an online search for “wild bird feeding starter kits” and none came up in the top 10 links provided]
- With time constraints noted by Lapsed Customers and Prospects, it may be beneficial to communicate the weekly time investment typically made to bring hours of beauty and entertainment to their yard.
- There is synergy between seed and nectar feeding. Although producers are often competitors, it may be beneficial to collaborate in an effort to deepen involvement in wild bird feeding.
- Key attributes on which to place emphasis during feeder product development include a design that .. Is easy to and minimizes the frequency of refill, is easy to clean, is durable including weather-resistant, allows multiple birds to feed simultaneously, and deters unwanted animals from accessing the feed.
 - Options designed specifically for smaller/limited spaces will appeal to a notable segment, particularly Prospects who are more likely than others to live in an urban setting and/or an apartment.
- As part of their initial learning, Highly Involved Customers frequented a broad array of sources for their first feeder and feed. The resulting purchase conversion among their top 5 sources varied widely, and tandem feeder/feed purchases occurred only half the time. Home improvement and mass fared better among Lapsed and Low/Moderate Customers who placed strong shopping focus on these two channels, with conversions at 70%+ and most buying their first feeder and feed from the same source.
 - Websites are a source for information, but brick & mortar is where *Customers* buy the lions share of feeders and feed. *Highly Involved Customers* is the only segment that notably crosses over into online purchase as they become experienced buyers and users, but the bulk of their purchases remain in-store.
 - Gardening centers grow in importance as *Customers’* feeder collections and/or feed needs expand, likely due in part to a tandem gardening hobby.
 - Specialty becomes more valued by Highly Involved Customers as they increase their commitment to the activity, and their expectations and needs elevate.

Implications (cont'd)

- Prospects indicate a propensity for Specialty when they would shop for a feeder and feed, likely as a means to efficiently fill their knowledge gap with expert advice. In fact, they indicated recommendations from sales personnel and/or online would be weighed strongly in their purchase decisions.



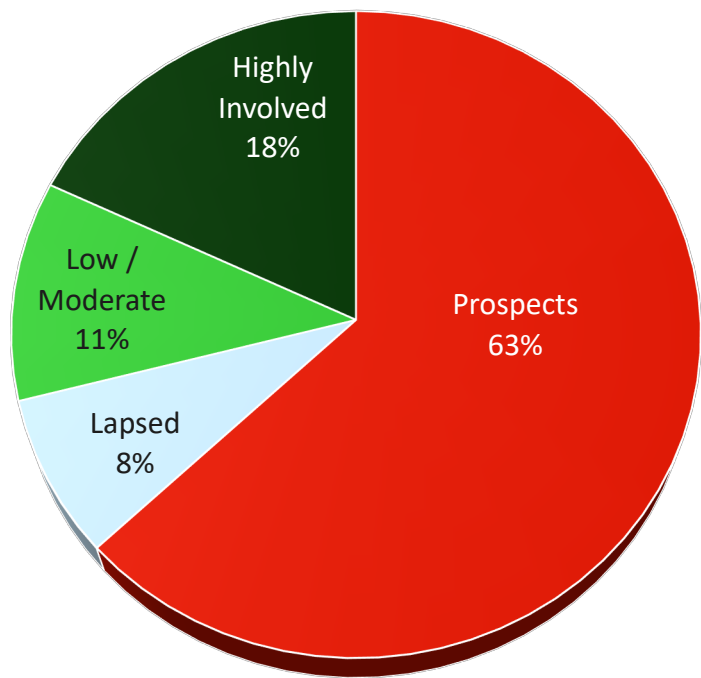
Feeding Segment Incidence

Feeding Segment Incidence

- Roughly one-third (35%) of the U.S. population is a Wild Bird Feeding Industry target; Prospects comprise the largest segment.



35% of contiguous U.S. population falls into the four bird feeding segments





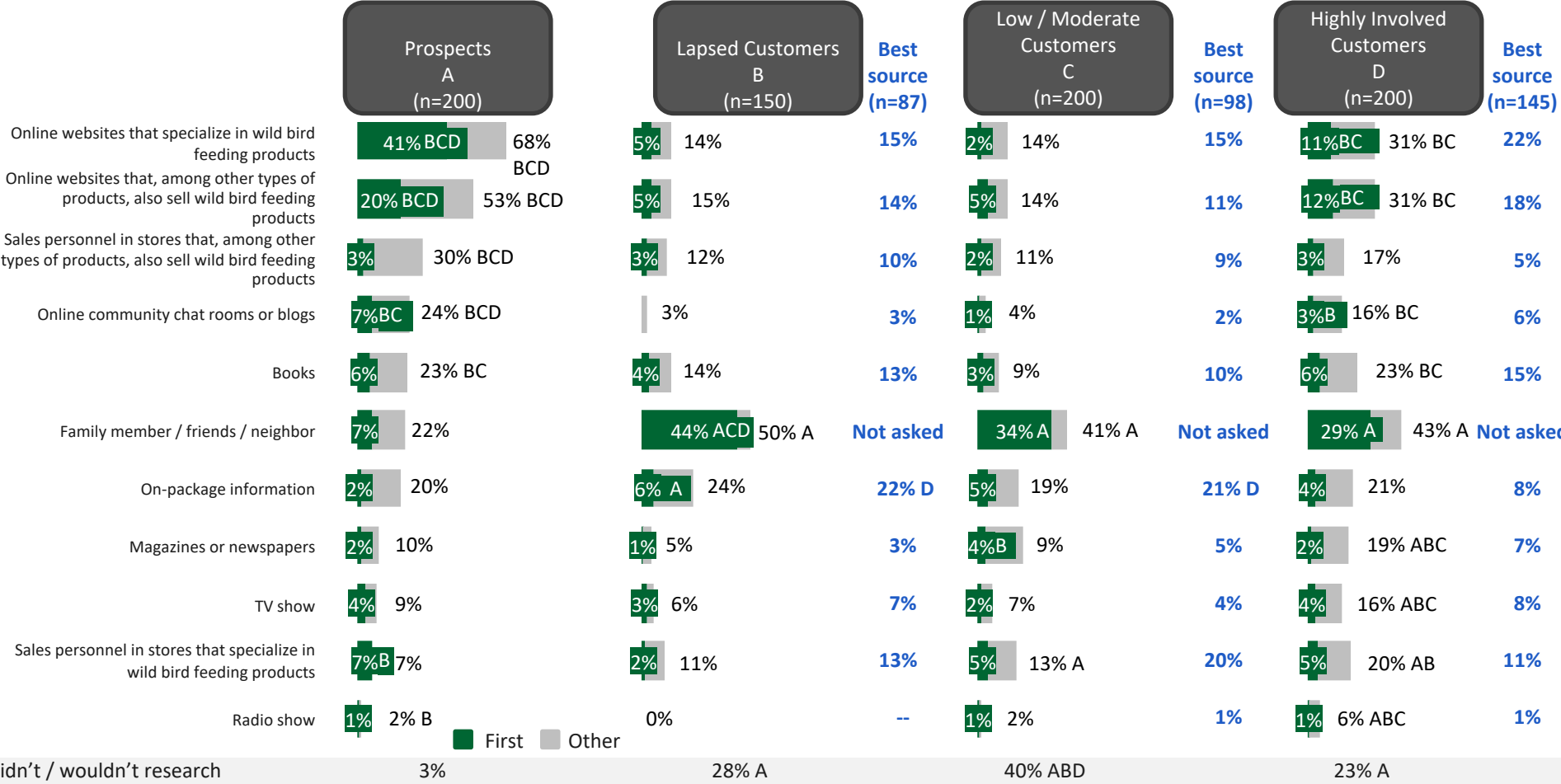
Awareness / Learning



Awareness / Learning

Source of First Learning

- Almost all *Prospects* would conduct research, believing they would rely heavily on online websites for information regarding wild bird feeding, feeders and feed, particularly specialty sites.
- Family members / friends / neighbors figured prominently into *Customers'* information sources when they first became involved, with *Highly Involved Customers* also having accessed a broad array of resources.



(Base: Total)
 Q.3 (PROSPECTS) Where would you go first to learn about wild bird feeding, wild bird feeders and wild bird seed, seed cakes, nectar or suet? Q.3a Where else would you go to learn about wild bird feeding, wild bird feeders and wild bird seed, seed cakes, nectar or suet?
 Q.3 (CUSTOMERS) Where did you **first** go to learn about wild bird feeding, wild bird feeders and wild bird seed, seed cakes, nectar or suet? Q.3a Where else did you learn about wild bird feeding, wild bird feeders and wild bird seed, seed cakes, nectar or suet?
 (Base: Did Not Exclusively Learn about Wild Bird Feeding from Family Member / Friends / Neighbor)
 Q.4 (CUSTOMERS) You indicated you used the sources below to learn about wild bird feeding, wild bird feeders and wild bird seed, seed cakes, nectar or suet. Which **one** was the **best** information source?
 A/B/C/D = Significantly higher than corresponding group with 95% confidence



Awareness / Learning

Types of Information Initially Sought

- *Prospects* would have many questions when exploring wild bird feeding, spanning the array of subjects.
- *Customers* initially sought a broad spectrum of information, with slightly more interest in determining the types of wild birds in their area and the best wild bird feed to use for them. They felt the information pursued was moderately easy to find.
- *Highly Involved Customers* appear to have been enthusiastic from the beginning, seeking information more strongly on a variety of topics.

| | Prospects A (n=200) | Lapsed Customers B (n=150) | Extremely / Very Easy (Base varies) | Low / Moderate Customers C (n=200) | Extremely / Very Easy (Base varies) | Highly Involved Customers D (n=200) | Extremely / Very Easy (Base varies) |
|---|---------------------------|----------------------------------|--|--|--|---|--|
| What type(s) of wild bird feed are best for the birds in my area | 50% BCD | 28% | 43%* | 23% | 49%* | 36% C | 54% |
| How to set up my wild bird feeder so it will attract birds | 47% BCD | 20% | 40%* | 18% | 49%* | 33% BC | 60% |
| What types of wild birds are in my area | 46% BCD | 28% | 55%* | 27% | 67% | 34% | 66% |
| How can I protect the wild bird feed so other animals won't bother it | 46% BCD | 23% | 37%* | 19% | 45%* | 30% C | 49% |
| Is wild bird feeding good for wild birds | 44% BCD | 23% | 46%* | 19% | 49%* | 29% C | 58% |
| What types of wild bird feed are available | 41% BC | 23% | 57%* | 23% | 53%* | 34% BC | 66% |
| What types of wild bird feeders are available | 41% BCD | 23% | 65%* | 20% | 51%* | 31% C | 68% |
| Do different types of wild bird feed attract different birds | 40% BC | 23% | 47%* | 22% | 51%* | 31% C | 49% |
| How can I minimize the mess around my wild bird feeder | 36% BCD | 17% | ** | 15% | 43%* | 24% C | 62%* |
| How will wild birds know I have a wild bird feeder | 29% BC | 17% | ** | 17% | 36%* | 26% BC | 60% BC |
| Didn't / wouldn't research | 3% | 28% A | | 40% ABD | | 23% A | |

(Base for Types of Information Sought: Total) (Base for Extremely / Very Easy is Those Who Sought Information Type). *Small base size (under 50); use caution when analyzing. **Very small base size (under 30); too small to show data.

Q.5 (PROSPECTS) What types of information will you look for when exploring wild bird feeding? (CUSTOMERS) When you first started exploring wild bird feeding, what types of information were you looking for, and how easy was it to find this information? (extremely easy; very easy; somewhat easy; not very easy; not at all easy; not applicable)

A/B/C/D = Significantly higher than corresponding group with 95% confidence



Awareness / Learning

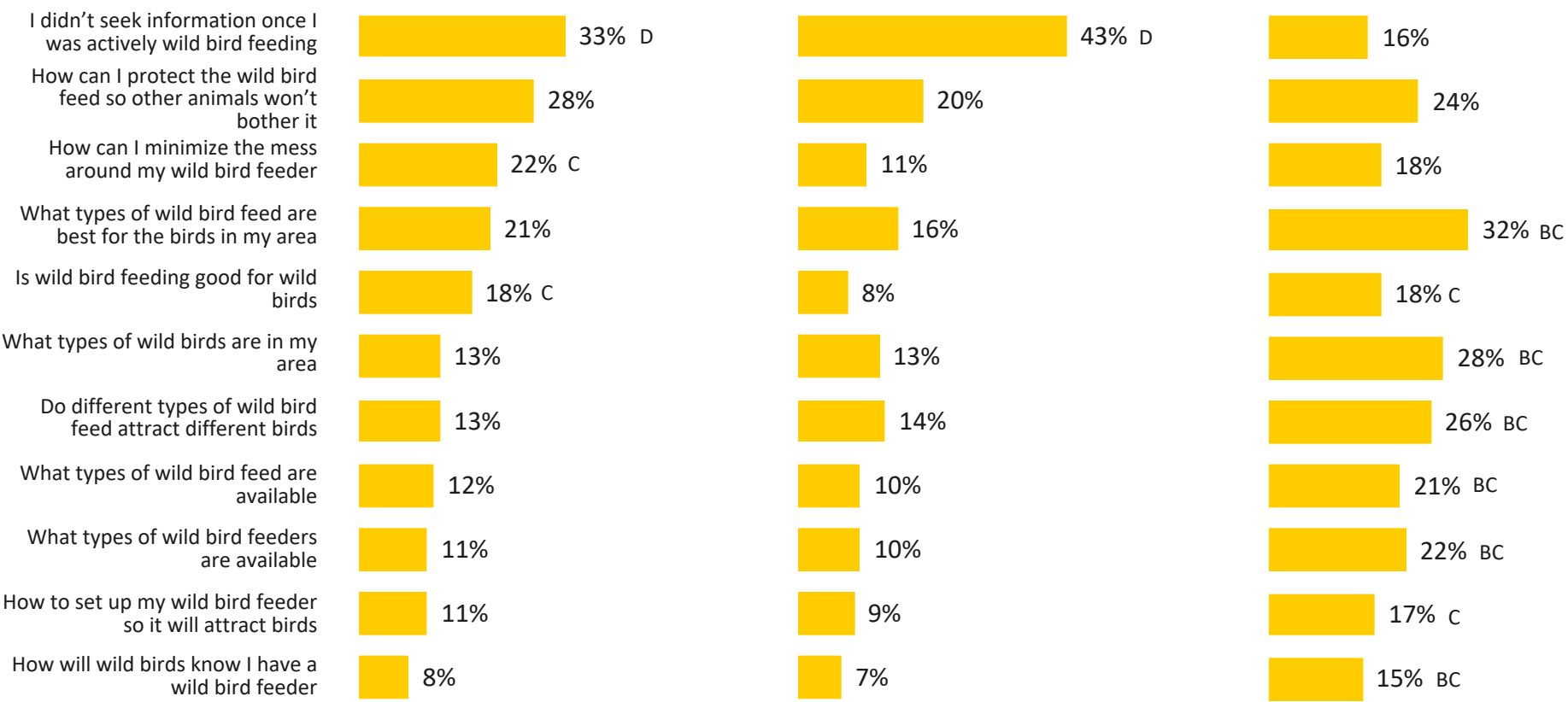
Information Customers Didn't Realize Needed Initially

- Although many *Lapsed* and *Low / Moderate Customers* ceased information-seeking once they started actively wild bird feeding, *Highly Involved Customers* continued to be eager to gain greater insights.
- Lapsed Customers* sought ways in which to minimize mess around feeders and questioned the soundness of feeding on wild bird health more so than *Low / Moderate Customers*.

Lapsed Customers
B
(n=150)

Low / Moderate Customers
C
(n=200)

Highly Involved Customers
D
(n=200)





Motivations / Barriers

Motivations for Wild Bird Feeding

- *Highly Involved Customers* are more strongly motivated by the aspects and rewards of wild bird feeding compared to the other three segments.
- All segments are driven by the connection with nature and its beauty that wild bird feeding delivers. Helping care for wild birds also plays a factor in pushing involvement.
- A top motivation for the three *Customer* segments is the entertainment of watching wild birds interact. *Prospects* find it less salient.
- *Prospects'* interest is notably piqued more than *Lapsed* and *Low / Moderate Customers* by the thought that, through wild bird feeding, they would positively contribute to the environment in their own yard / garden, promote pollination and seed distribution, help a disrupted natural environment and escape from technology.
- *Highly Involved* and *Low / Moderate Customers* share their love for their yard / gardening and the enhancement wild birds bring.

Motivations for Wild Bird Feeding (cont'd)



Motivations / Barriers



(Base: Total)
 Q.1 (PROSPECTS) Please indicate the extent to which each statement describes why you would consider feeding wild birds.
 (LAPSED CUSTOMERS) Please indicate the extent to which each statement describes why you used to feed wild birds.
 (LOW / MODERATE / HIGHLY INVOLVED CUSTOMERS) Please indicate the extent to which each statement describes why you feed wild birds.
 (5-point scale where 5="completely describes" and 1="does not at all describe")
 A/B/C/D = Significantly higher than corresponding group with 95% confidence

Motivations for Wild Bird Feeding (cont'd)



Motivations / Barriers

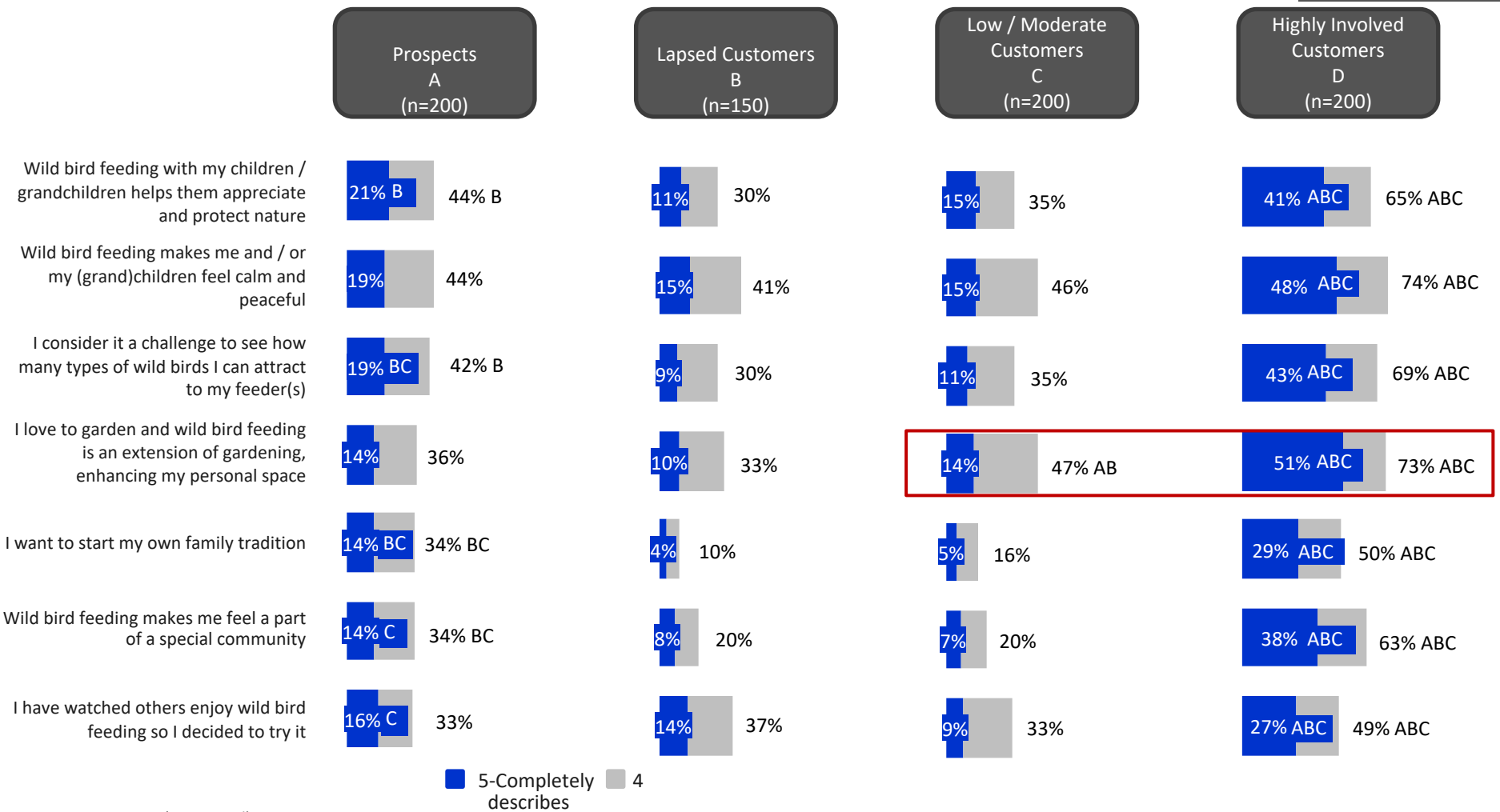


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Motivations for Wild Bird Feeding (cont'd)



Motivations / Barriers

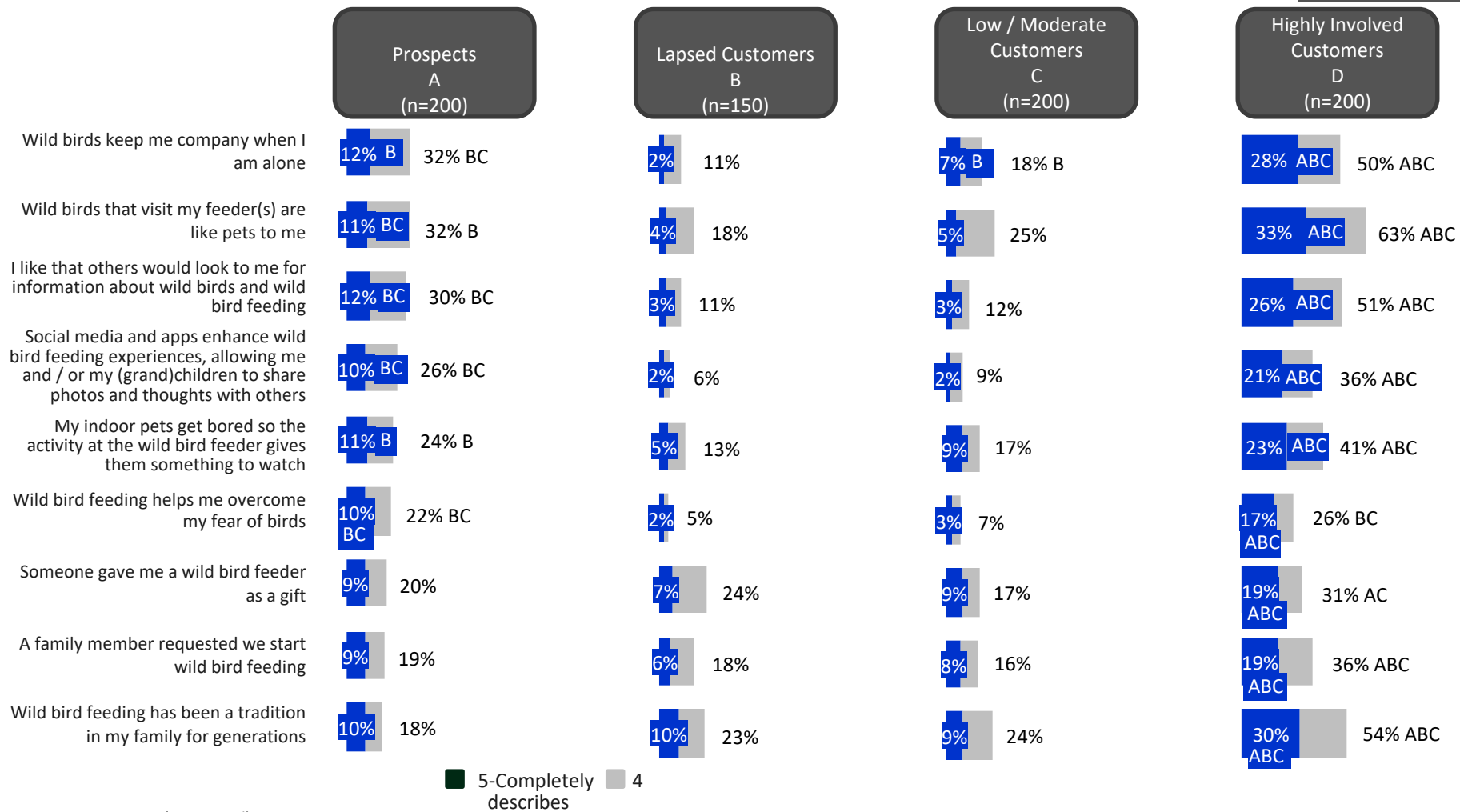


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 (5-point scale where 5="completely describes" and 1="does not at all describe")
 A/B/C/D = Significantly higher than corresponding group with 95% confidence

Motivations for Wild Bird Feeding (cont'd)



Motivations / Barriers



(Base: Total)

Q.1 (PROSPECTS) Please indicate the extent to which each statement describes why you would consider feeding wild birds.

(LAPSED CUSTOMERS) Please indicate the extent to which each statement describes why you used wild birds.

(LOW / MODERATE / HIGHLY INVOLVED CUSTOMERS) Please indicate the extent to which each statement describes why you feed wild birds.

(5-point scale where 5="completely describes" and 1="does not at all describe")

A/B/C/D = Significantly higher than corresponding group with 95% confidence

Barriers to Wild Bird Feeding / Feeding More Often

- For *Prospects*, a key barrier to wild bird feeding is a lack of knowledge and the necessity of investing time and research, but not knowing where to get the information. A top piece of information desired is the method of attracting the birds wanted.
 - Many are busy and put priority on other things.
 - Approximately half simply never thought about wild bird feeding before.
 - Some question whether feeding is “good” for wild birds.
 - A notable proportion are concerned about the potential mess and attracting other wildlife.
- *Low/Moderate and Highly Involved Customers’* top barrier is the guilt they feel if their feeders run out.
 - Some *Highly Involved Customers* also object to squirrels that are attracted.
- Being busy and prioritizing other tasks is a key issue for *Lapsed Customers*. They also don’t enjoy refilling the feeder so often—and cleaning the feeder. The feed attracts unwanted animals into the yard. Having other animals eat the feed means *Lapsed Customers* were doing the undesirable refilling and cleaning chores while the benefit of feeding wild birds has been diminished.

Barriers to Wild Bird Feeding / Feeding More Often



Motivations / Barriers

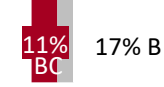
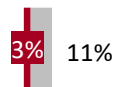
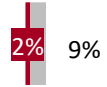
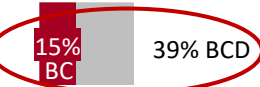
Prospects
A
(n=200)

Lapsed Customers
B
(n=150)

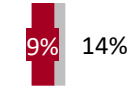
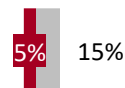
Low / Moderate Customers
C
(n=200)

Highly Involved Customers
D
(n=200)

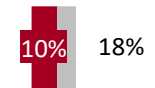
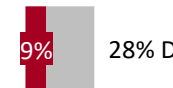
(CUSTOMERS) Birds come to my yard but not the ones I want / (PROSPECTS) I don't know how to attract the birds I want to my yard



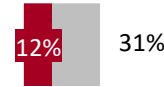
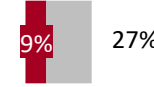
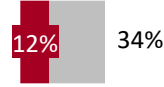
My life is too busy with other things



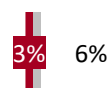
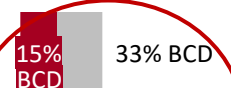
I dislike having to clean the wild bird feeder(s)



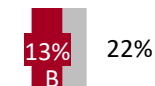
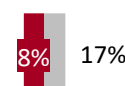
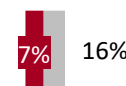
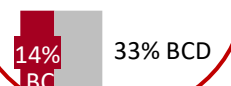
I feel guilty if I don't keep the wild bird feeder(s) filled all the time



I don't know where to get the information I need



I am concerned about feeding wild birds feed that is not good for them



5-Agree completely 4

(Base: Total)

Q.2 (PROSPECTS) Please indicate the extent to which you agree or disagree with each statement as reasons you don't feed wild birds currently but may in the future.

(LAPSED CUSTOMERS) Please indicate the extent to which you agree or disagree with each statement as reasons you don't feed wild birds anymore.

(LOW / MODERATE / HIGHLY INVOLVED CUSTOMERS) Please indicate the extent to which you agree or disagree with each statement as reasons you don't feed wild birds more often.

(5-point scale where 5="agree completely" and 1="disagree completely")

A/B/C/D = Significantly higher than corresponding group with 95% confidence

Barriers to Wild Bird Feeding / Feeding More Often (cont'd)



■ 5-Agree completely ■ 4

(Base: Total)

Q.2 (PROSPECTS) Please indicate the extent to which you agree or disagree with each statement as reasons you don't feed wild birds currently but may in the future.

(LAPSED CUSTOMERS) Please indicate the extent to which you agree or disagree with each statement as reasons you don't feed wild birds anymore.

(LOW / MODERATE / HIGHLY INVOLVED CUSTOMERS) Please indicate the extent to which you agree or disagree with each statement as reasons you don't feed wild birds more often.

(5-point scale where 5="agree completely" and 1="disagree completely")

A/B/C/D = Significantly higher than corresponding group with 95% confidence

Barriers to Wild Bird Feeding / Feeding More Often (cont'd)



■ 5-Agree completely ■ 4

(Base: Total)

Q.2 (PROSPECTS) Please indicate the extent to which you agree or disagree with each statement as reasons you **don't feed wild birds currently but may in the future.**

(LAPSED CUSTOMERS) Please indicate the extent to which you agree or disagree with each statement as reasons you **don't feed wild birds anymore.**

(LOW / MODERATE / HIGHLY INVOLVED CUSTOMERS) Please indicate the extent to which you agree or disagree with each statement as reasons you **don't feed wild birds more often.**

(5-point scale where 5="agree completely" and 1="disagree completely")

A/B/C/D = Significantly higher than corresponding group with 95% confidence

Barriers to Wild Bird Feeding / Feeding More Often



Motivations / Barriers

Prospects
A
(n=200)

Lapsed Customers
B
(n=150)

Low / Moderate Customers
C
(n=200)

Highly Involved Customers
D
(n=200)

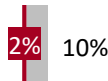
I don't know anything about it so it will take some time and research to get started



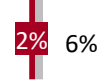
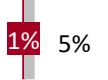
I never thought about it before



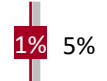
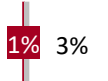
Wild birds don't come to my feeder(s) regularly / at all and I don't know why



The wild birds are not interested in my feeder(s)



Wild bird feeding doesn't bring me pleasure



5-Agree completely 4

(Base: Total)

Q.2 (PROSPECTS) Please indicate the extent to which you agree or disagree with each statement as reasons you don't feed wild birds currently but may in the future.

(LAPSED CUSTOMERS) Please indicate the extent to which you agree or disagree with each statement as reasons you don't feed wild birds anymore.

(LOW / MODERATE / HIGHLY INVOLVED CUSTOMERS) Please indicate the extent to which you agree or disagree with each statement as reasons you don't feed wild birds more often.

(5-point scale where 5="agree completely" and 1="disagree completely")

A/B/C/D = Significantly higher than corresponding group with 95% confidence



Feeders Owned



First Feeder: Feeder Type

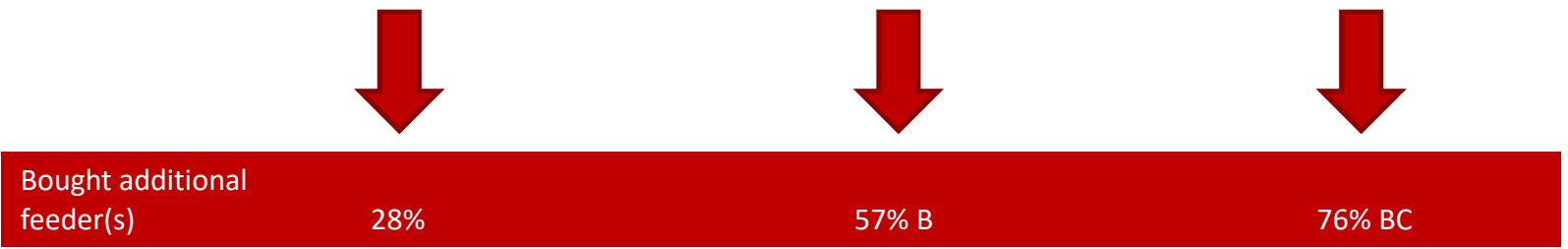
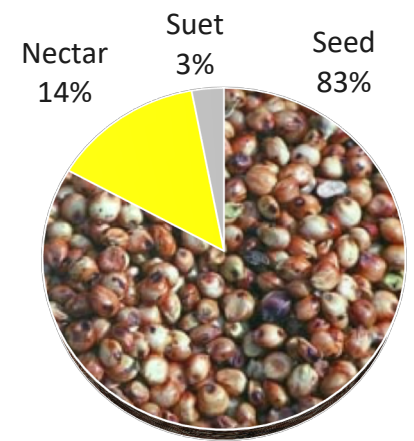
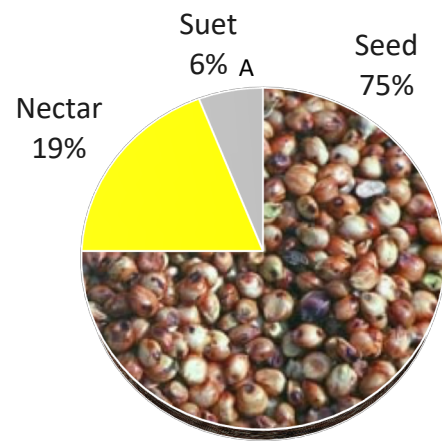
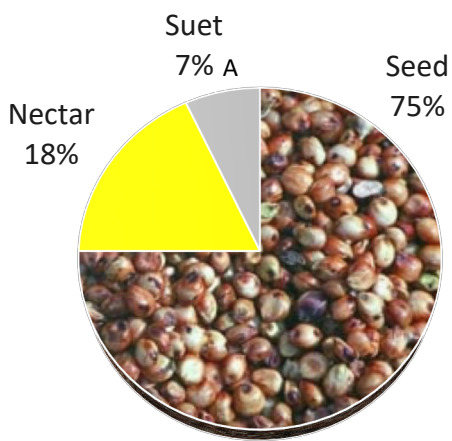
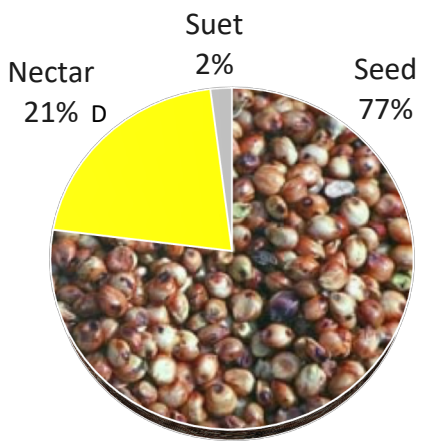
- Seed feeders are the most common feeder type with which to initiate wild bird feeding, purchased by three-quarters or more.
- Nectar feeders are next, with suet a distant third.
- Prospects claimed they would initially purchase in roughly the same proportions.
- The great majority of Highly Involved Customers bought additional feeders, outpacing all others. Low/Moderate Customers followed, with Lapsed Customers least likely to have bought supplemental feeders.

Prospects
A
(n=200)

Lapsed Customers
B
(n=150)

Low / Moderate
Customers
C
(n=200)

Highly Involved
Customers
D
(n=200)



(Base: Total)
 Q.12 (PROSPECTS) Thinking about the **first** wild bird feeder you may purchase, what type of wild bird feeder would you likely buy?
 (CUSTOMERS) Thinking about your **first** wild bird feeder, what type of wild bird feeder did you buy or receive?
 Q.16 (CUSTOMERS) Since buying or receiving your first wild bird feeder, have you purchased **additional wild bird feeders**?
 A/B/C/D = Significantly higher than corresponding group with 95% confidence

Number of Feeders Own

- On average, *Customers* own 1 to 5 wild bird feeders. Seed feeders are the most popular.
 - Lapsed Customers* own the lowest number of feeders, *Highly Involved Customers* the greatest number.

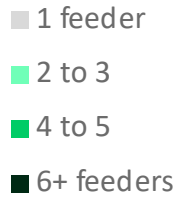
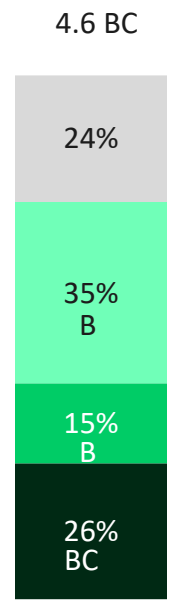
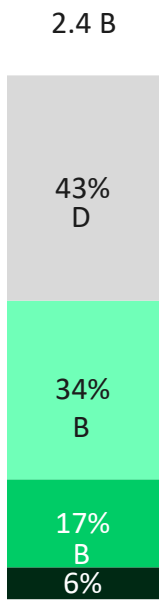
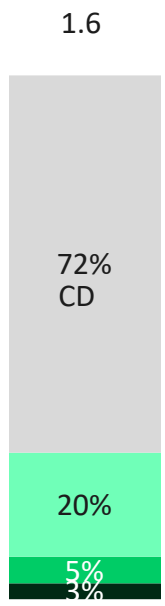


Lapsed Customers
B
(n=150)

Low / Moderate Customers
C
(n=200)

Highly Involved Customers
D
(n=200)

Average number of feeders



Average number of:

| | | | |
|----------------|-----|-------|--------|
| Seed feeders | 1.1 | 1.4 B | 2.6 BC |
| Nectar feeders | 0.3 | 0.6 B | 1.1 BC |
| Suet feeders | 0.2 | 0.4 B | 0.9 BC |

(Base: Total Customers)

Q.12 (CUSTOMERS) Thinking about your **first** wild bird feeder, what type of wild bird feeder did you buy or receive?

Q.19 (LAPSED CUSTOMERS) How many wild bird **feeders** did you **own and use** when you stopped feeding wild birds? Please indicate by type.

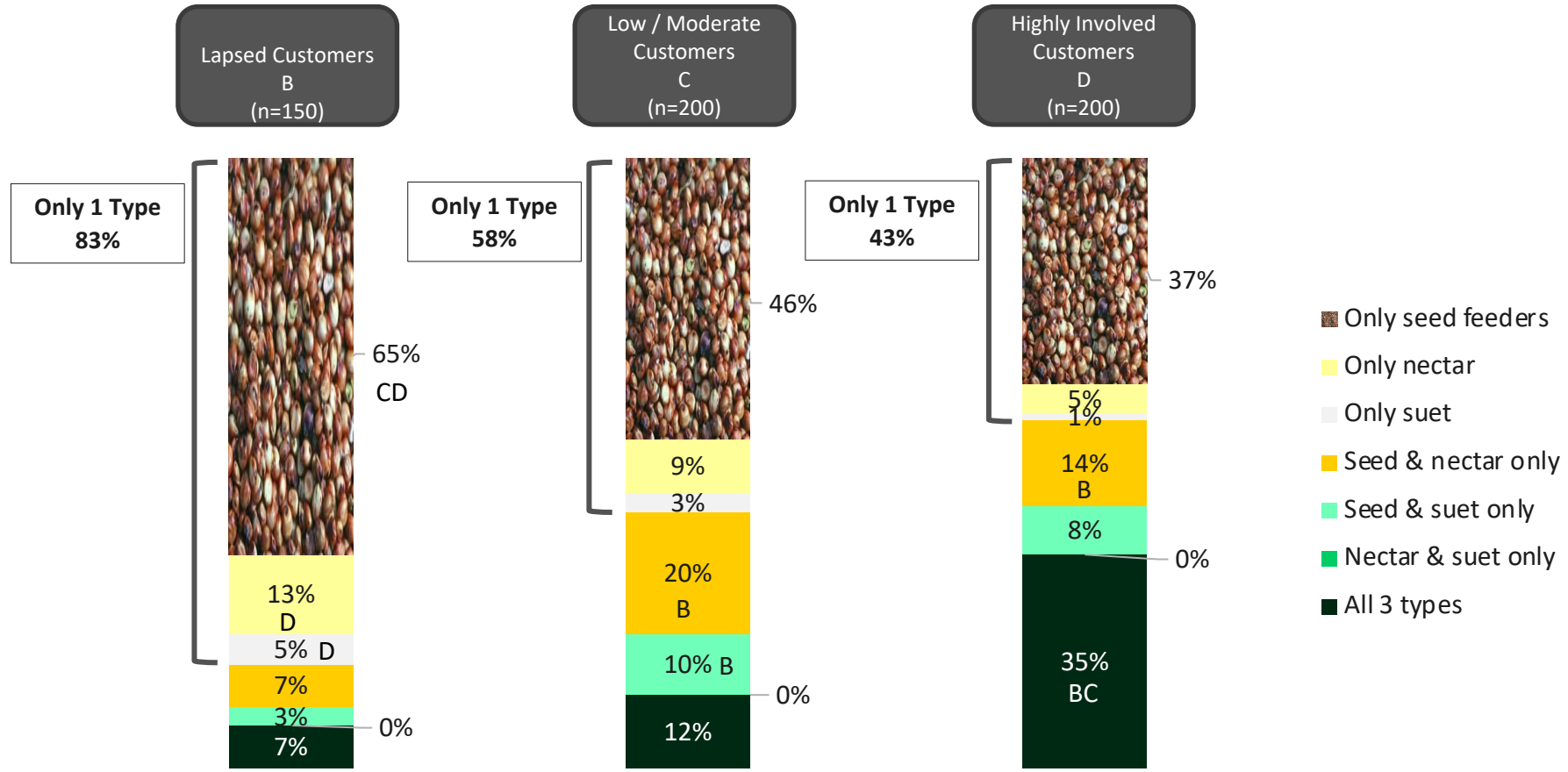
(LOW / MODERATE / HIGHLY INVOLVED CUSTOMERS) How many wild bird **feeders** do you **currently own and use**? Please indicate by type.

B/C/D = Significantly higher than corresponding group with 95% confidence



Types of Feeders Own

- With the great majority of *Lapsed Customers* owning a single feeder, it follows it is a seed feeder.
- *Low / Moderate Customers* tended to stick with seed or add in nectar feeder(s).
- *Highly Involved Customers* are the most likely to own all three feeder types—seed, nectar and suet.



(Base: Total Customers)
 Q.12 (CUSTOMERS) Thinking about your **first** wild bird feeder, what type of wild bird feeder did you buy or receive?
 Q.19 (LAPSED CUSTOMERS) How many wild bird **feeders** did you **own and use** when you stopped feeding wild birds? Please indicate by type.
 (LOW / MODERATE / HIGHLY INVOLVED CUSTOMERS) How many wild bird **feeders** do you **currently own and use**? Please indicate by type.
 B/C/D = Significantly higher than corresponding group with 95% confidence

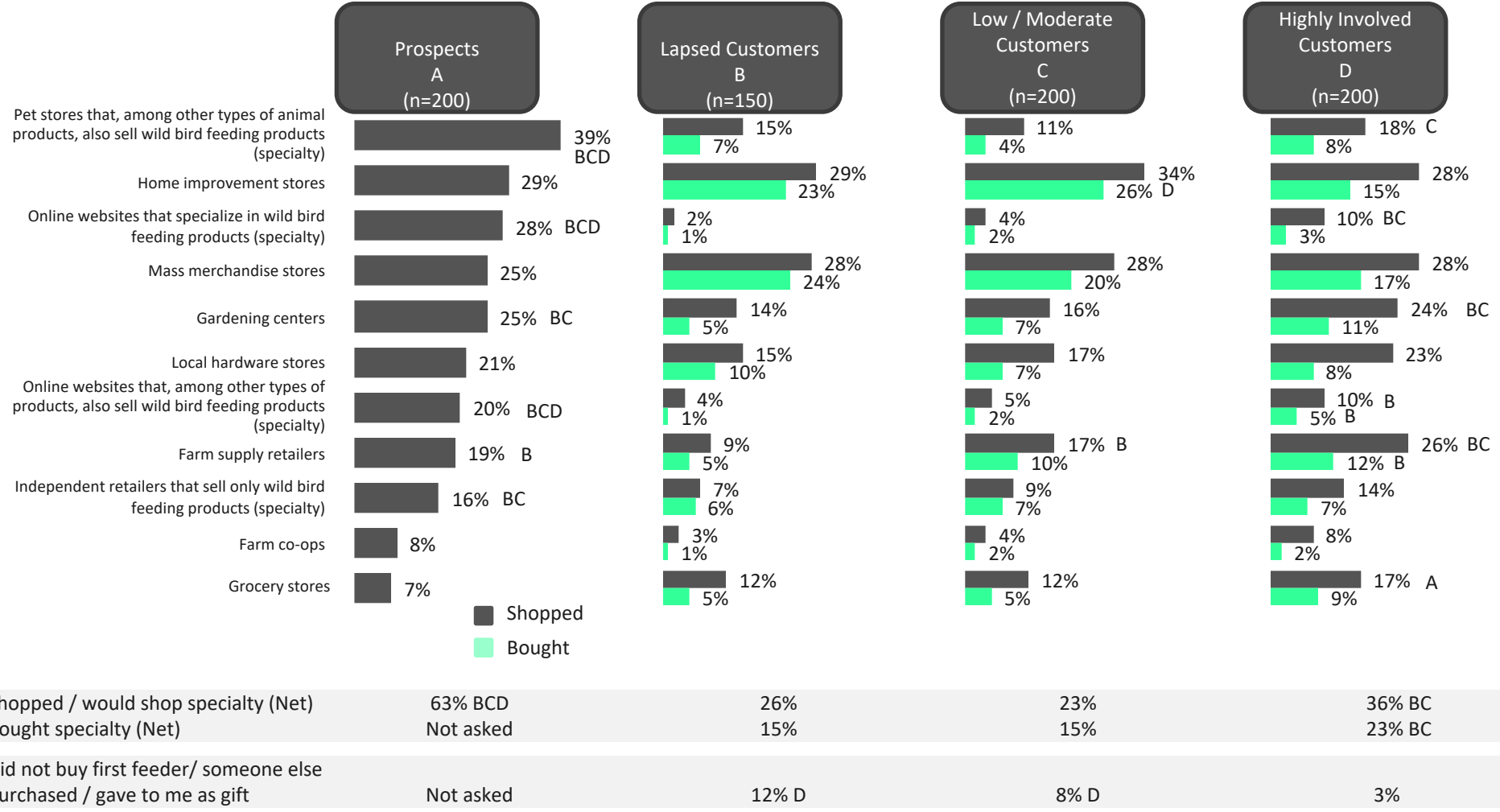


Feeder Shopping / Buying Behavior

First Feeder: Where Shop / Buy



- The Specialty channel holds shopping appeal for *Prospects*.
- *Lapsed and Low/Moderate Customers* most commonly shopped and bought their first feeder from home improvement and mass merchandise stores. 1 in 10 were gifted their first feeder, negating their need to shop and buy.
- *Highly Involved Customers* shopped and bought from a broader array than all others, from big box to gardening centers to local hardware and farm supply.



(Base: Total)
 Q.11 (PROSPECTS) Thinking about starting wild bird feeding, where will you go to shop for your first wild bird feeder?
 (CUSTOMERS) Thinking back to when you first decided to feed wild birds, where did you shop for your first wild bird feeder? Where did you buy your first wild bird feeder?
 A/B/C/D = Significantly higher than corresponding group with 95% confidence



Feeder Shopping /
Buying Behavior

First Feeder: Criteria for Deciding on the Feeder Type

- Top buying criteria for *Prospects* and *Customers* include ease of refilling the feeder and price.
- *Highly Involved Customers* also emphasize durability and the ability to feed many birds at the same time.
- *Prospects* also seek feeders that are durable/weather resistant, easy to clean, deter other animals and come recommended. A notable segment would like one suitable for limited space.

| | Prospects | Lapsed Customers | Low / Moderate Customers | Highly Involved Customers |
|---|-----------|------------------|--------------------------|---------------------------|
| (Base: Indicated Shopping Source for First Feeder) | (200) | (132) | (185) | (194) |
| | A | B | C | D |
| | % | % | % | % |
| Easy to refill | 43 | 40 | 42 | 41 |
| Price | 43 D | 40 | 34 | 31 |
| Durability | 41 BC | 16 | 20 | 33 BC |
| Easy to clean | 41 BCD | 16 | 14 | 21 |
| Weather resistant | 38 BCD | 17 | 17 | 21 |
| Recommendation (Net) | 37 BCD | 20 | 14 | 25 C |
| Recommendation from sales personnel | 21 BCD | 8 | 3 | 8 C |
| Recommendation online | 16 BCD | 1 | 5 B | 9 B |
| Recommendation from a family member / friend | 9 | 12 | 7 | 13 |
| Its ability to prevent other animals from eating the feed | 36 BCD | 11 | 15 | 18 |
| Many birds can feed from it at the same time | 28 B | 15 | 25 B | 36 BC |
| Its ability to minimize mess around the feeder | 25 BCD | 8 | 5 | 6 |
| Attracts the type(s) of birds interested in | 23 | 15 | 24 | 29 B |
| The attractiveness (color / shape / design) of the feeder | 21 | 24 | 30 A | 25 |
| Holds a lot of feed, nectar or suet, limiting how often it needs to be refilled | 20 | 21 | 18 | 24 |
| Can be used in limited space (e.g., small garden, patio, balcony) | 20 BC | 8 | 4 | 13 C |
| Complements my yard / garden | 16 | 11 | 17 | 12 |
| Information provided on the packaging | 13 C | 11 | 7 | 14 C |
| Brand | 7 B | 1 | 6 B | 8 B |
| Does not require a shepherd's hook or other means to hang | 6 | 3 | 3 | 5 |
| I didn't know there are different types | 8 BCD | Not asked | Not asked | Not asked |

Q.13 (PROSPECTS) Thinking about the **first** wild bird feeder you may purchase, how will you decide the **type** of wild bird feeder to buy?
 (CUSTOMERS) Thinking about your **first** wild bird feeder, how did you decide the **type** of wild bird feeder you bought?
 A/B/C/D = Significantly higher than corresponding group with 95% confidence

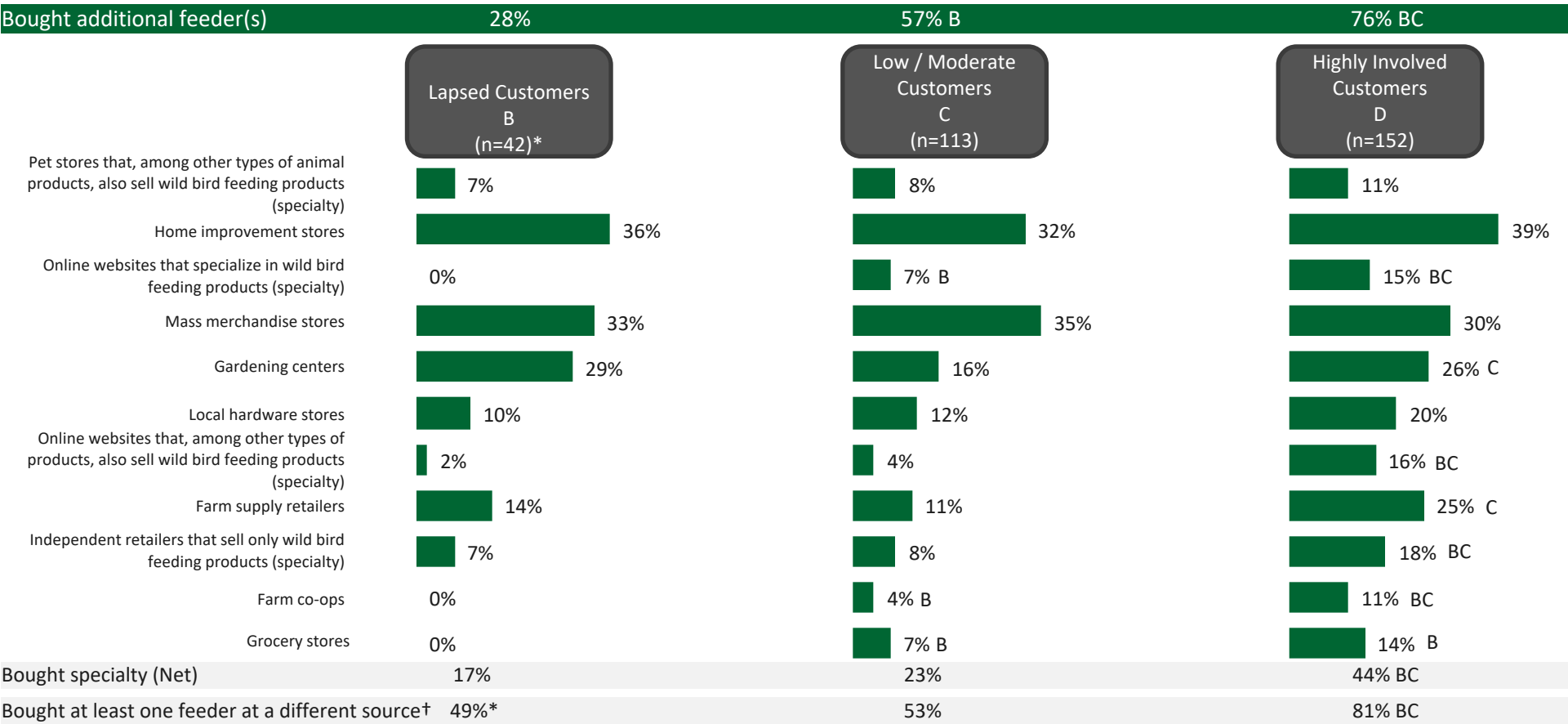


Feeder Shopping /
Buying Behavior

Additional Feeders: Where Buy

Among those who bought an additional feeder ...

- About half of *Lapsed* and *Low/Moderate Customers* purchased an additional feeder at a source different from their first. They still gravitated strongly toward home improvement and mass, but there was a notable shift toward gardening centers, particularly among *Lapsed Customers*.
- Most *Highly Involved Customers* made an incremental purchase at a new source. There was greater buying across almost all channels, with home improvement and Specialty registering especially strong increases.



(Base: Bought Additional Feeder(s))

*Small base size (under 50); use caution when analyzing.

†Base: Bought First and Additional Feeder(s) – excludes those gifted first feeder
 Q.16 (CUSTOMERS) Since buying or receiving your first wild bird feeder, have you purchased additional wild bird feeders?
 Q.17 (CUSTOMERS) Q.17 Where did you purchase the **additional wild bird feeders?**
 B/C/D = Significantly higher than corresponding group with 95% confidence



Feeder Shopping /
Buying Behavior

Reasons for Purchasing Additional Wild Bird Feeders through New Sources

- Top reasons *Customers* made a feeder purchase from a new source are convenient location and a larger variety of feeders.
- *Low/Moderate Customers* are equally motivated by the ability to buy everything needed for wild bird feeding from the new source(s). *Highly Involved Customers* more strongly stated they sought a new source to meet their higher expectations and their first resource did not have what they needed.

| | Total Customers | Lapsed Customers | Low / Moderate Customers | Highly Involved Customers |
|---|-----------------|------------------|--------------------------|---------------------------|
| (Base: Bought at Least One Additional Feeder at Different Source) | (195) | (19)** | (56) | (120) |
| | % | B % | C % | D % |
| Reasons for buying feeders at different source | | | | |
| Convenient location | 41 | | 29 | 44 C |
| Larger variety of wild bird feeders from which to choose | 35 | | 25 | 39 |
| Can buy everything I need for wild bird feeding from these new sources | 19 | | 23 | 18 |
| Wanted to improve my results so looked for new ideas / products | 17 | | 13 | 21 |
| Offers products not available elsewhere | 17 | | 14 | 20 |
| My higher expectations of how wild bird feeders should perform | 16 | | 5 | 22 C |
| Recommendation from a family member / friend | 13 | | 18 | 13 |
| Like the personal service I receive from the new source(s) | 13 | | 7 | 16 |
| The place from which I bought my first wild bird feeder did not have what I was looking for | 11 | | 5 | 14 C |
| Website is easier to navigate | 10 | | 9 | 11 |
| Needed / wanted expert advice | 10 | | 7 | 13 |
| Easier to order online | 10 | | 7 | 13 |
| Has a loyalty / rewards program | 8 | | 5 | 10 |
| Low or no shipping fees for items delivered to my home | 7 | | 5 | 8 |

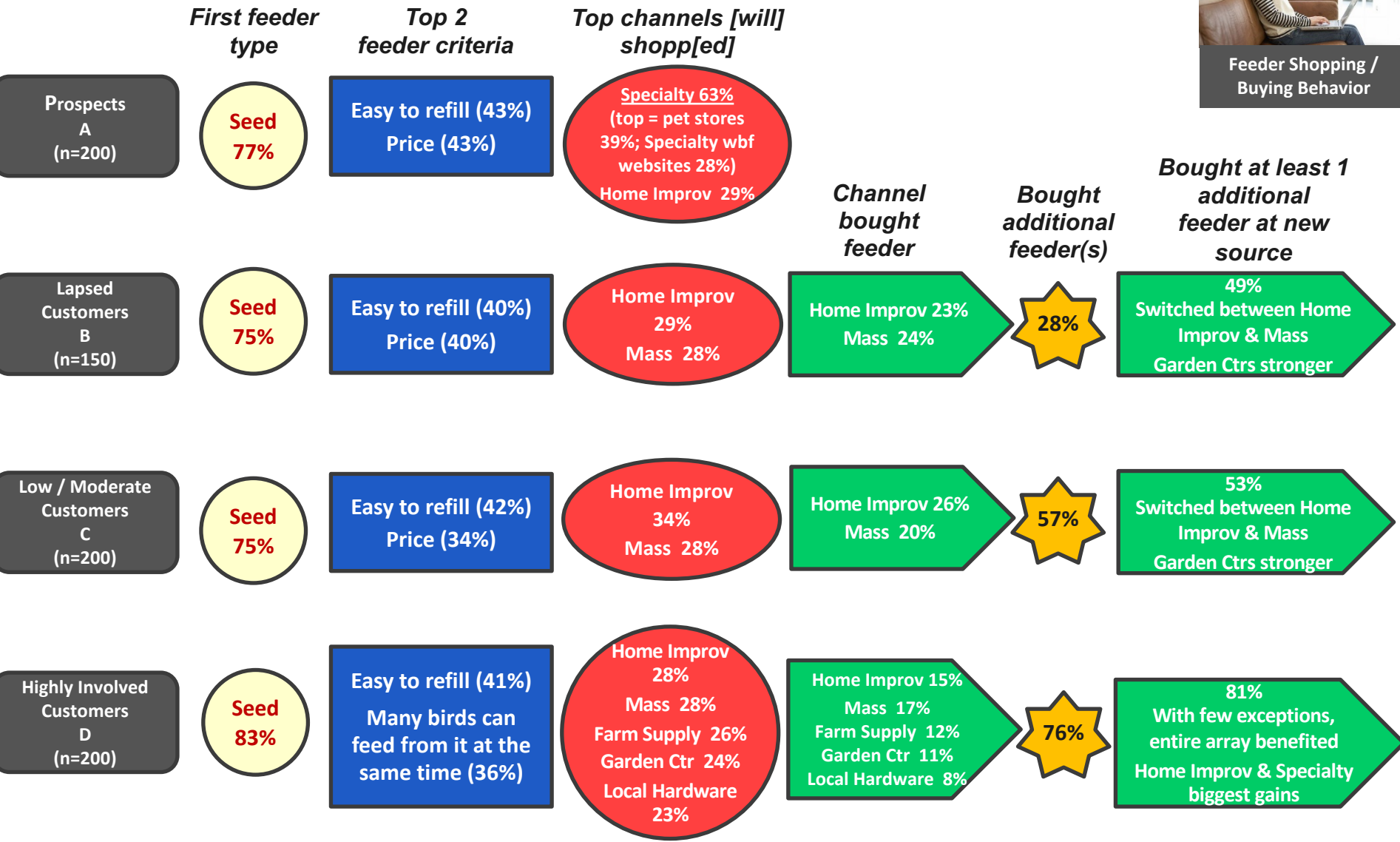
*Small base size (under 50); use caution when analyzing. **Very small base size (under 30); too small to show data.

Q.17 (CUSTOMERS) Where did you purchase the **additional wild bird feeders**?

Q.18 (CUSTOMERS) You indicated you purchased **additional wild bird feeders through new sources**. What prompted you to use the new source(s).

B/C/D = Significantly higher than corresponding group with 95% confidence

Feeder Process Highlights





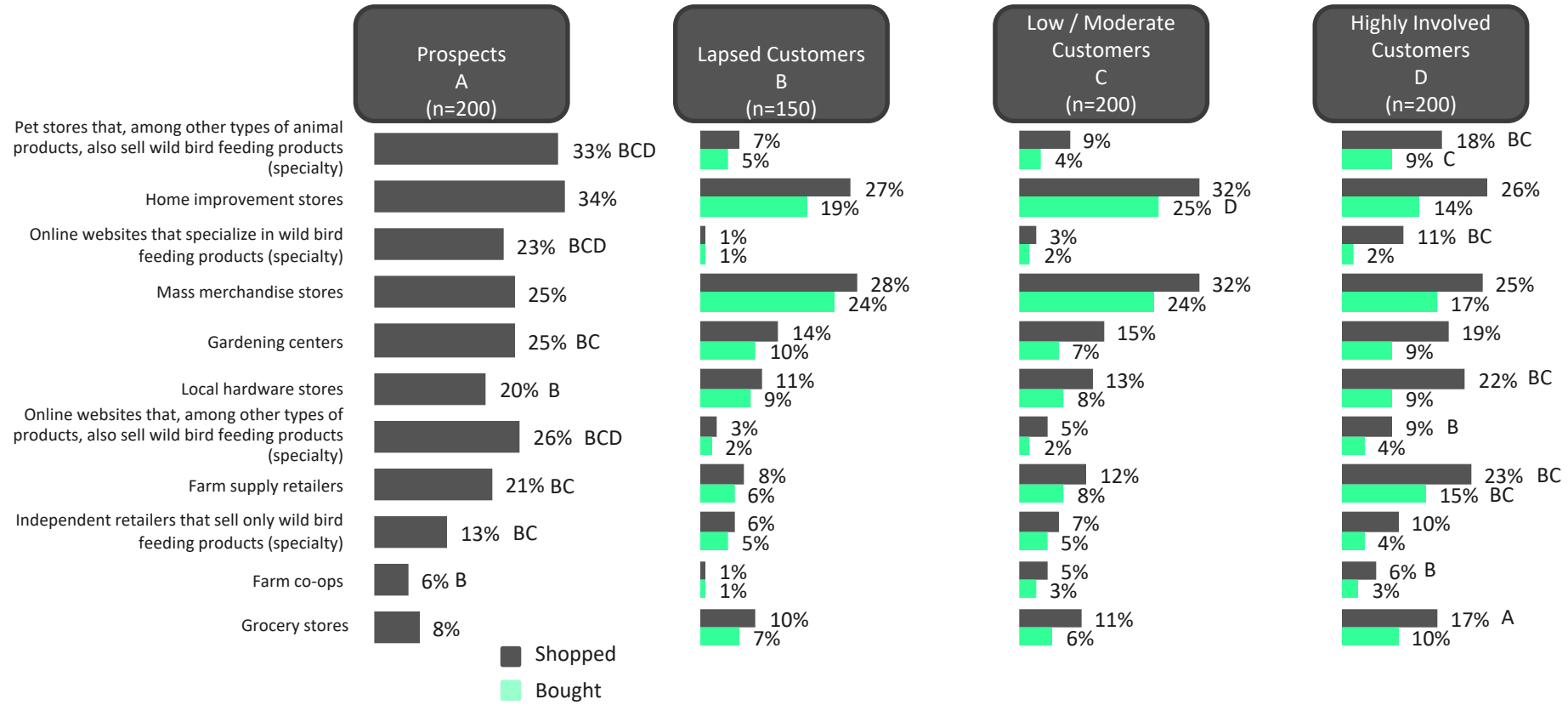
Feed Shopping / Buying Behavior



Feed Shopping / Buying Behavior

First Feed: Where Shop / Buy

- Initial feed shopping behavior mirrors that reported for feeders.
- It follows that most *Lapsed* and *Low/Moderate Customers* purchased their first feed from the same source as their first feeder. *Highly Involved Customers* continued to be selective, with only half having bought their initial feed at the same venue as their first feeder.



| | | | | |
|---|-----------|-------|-------|--------|
| Shopped / would shop specialty (Net) | 65% BCD | 17% | 19% | 34% BC |
| Bought specialty (Net) | Not asked | 13% | 13% | 20% |
| Did not buy first feed/ someone else purchased / gave to me as gift | Not asked | 11% D | 6% | 4% |
| Bought first feeder & first feed from same source† | Not asked | 73% D | 69% D | 51% |

(Base: Total)

†Base: Bought first feeder and first feed

Q.14 (PROSPECTS) Where will you go to **shop** for your **first wild bird seed, seed cakes, nectar or suet?**

(CUSTOMERS) Where did you **shop** for your **first wild bird seed, seed cakes, nectar or suet?** Where did you **buy** your **first wild bird seed, seed cakes, nectar or suet?**

A/B/C/D = Significantly higher than corresponding group with 95% confidence



Feed Shopping / Buying Behavior

First Feed: Criteria for Deciding on the Feed Type

- Price is a driver for feed purchase decisions across all segments, and is the top motivator for *Lapsed* and *Low / Moderate Customers*.
- *Prospects* are also sensitive to recommendations.
- *Highly Involved Customers* are strongly motivated by bird responses to the feed— it attracts the type(s) of birds desired, and a variety of birds like it.

| | Prospects | Lapsed Customers | Low / Moderate Customers | Highly Involved Customers |
|--|---------------|------------------|--------------------------|---------------------------|
| (Base: Indicated Shopping Source for First Feed) | (200) | (134) | (188) | (193) |
| | A | B | C | D |
| | B | % | % | % |
| <u>Recommendation (Net)</u> | <u>52</u> BCD | <u>28</u> | <u>21</u> | <u>29</u> |
| Recommendation online | 28 BCD | 2 | 5 B | 10 B |
| Recommendation from sales personnel | 22 CD | 14 | 8 | 11 |
| Recommendation from a family member / friend | 13 | 14 | 10 | 10 |
| Price | 44 D | 46 D | 45 D | 32 |
| Provides essential nutrients to wild birds | 25 BC | 12 | 15 | 23 BC |
| A variety of birds like to eat it | 25 | 24 | 27 | 37 ABC |
| Attracts the type(s) of birds interested in | 24 | 21 | 30 | 34 AB |
| Information provided on the packaging | 17 | 24 | 16 | 19 |
| Package size | 16 | 13 | 13 | 19 |
| Does not easily germinate / sprout when some falls from the feeder | 12 BC | 2 | 3 | 7 BC |
| Brand | 8 B | 2 | 6 | 10 B |
| I didn't know there are different types | 7 | Not asked | Not asked | Not asked |

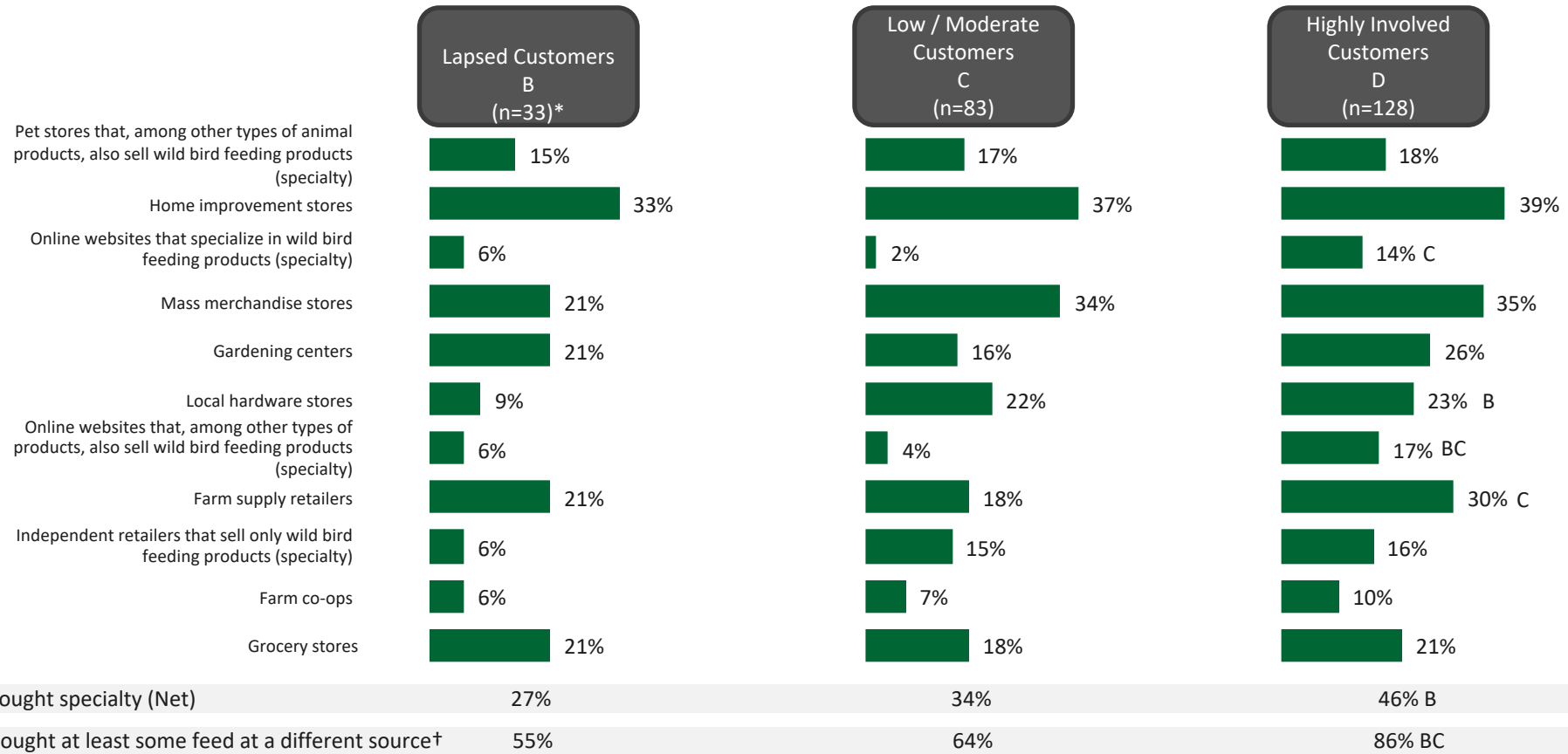


Feed Shopping / Buying Behavior

Different Feed: Where Buy

- The great majority of *Lapsed Customers* never purchased a different type of feed. *Highly Involved Customers*, as expected, are the most likely to buy different feed.
- Popular sources for new feed include home improvement centers and mass merchandisers, with Specialty also playing a significant role in *Highly Involved Customers'* purchases.

Purchased different feed 22% 42% B 64% BC



(Base: Bought Different Type of Feed)

*Small base size (under 50); use caution when analyzing.

†Base: Bought First and Different Feed – excludes those gifted first feed

Q.20 (CUSTOMERS) Since buying your first wild bird seed, seed cakes, nectar or suet, have you purchased a different type of seed, seed cakes, nectar or suet, or tried a different type of wild bird feed altogether? (Example: first purchased seed but have purchased suet at this point)?

Q.21 (CUSTOMERS) Where did you purchase the different varieties of wild bird seed, seed cakes, nectar or suet, or different types of wild bird feed?

B/C/D = Significantly higher than corresponding group with 95% confidence



Reasons for Purchasing Different Feed through Different Sources

- A convenient location is the main driver for *Low / Moderate Customers* frequenting a new source for feed.
- For *Highly Involved Customers*, variety and quality are key motivators along with location.

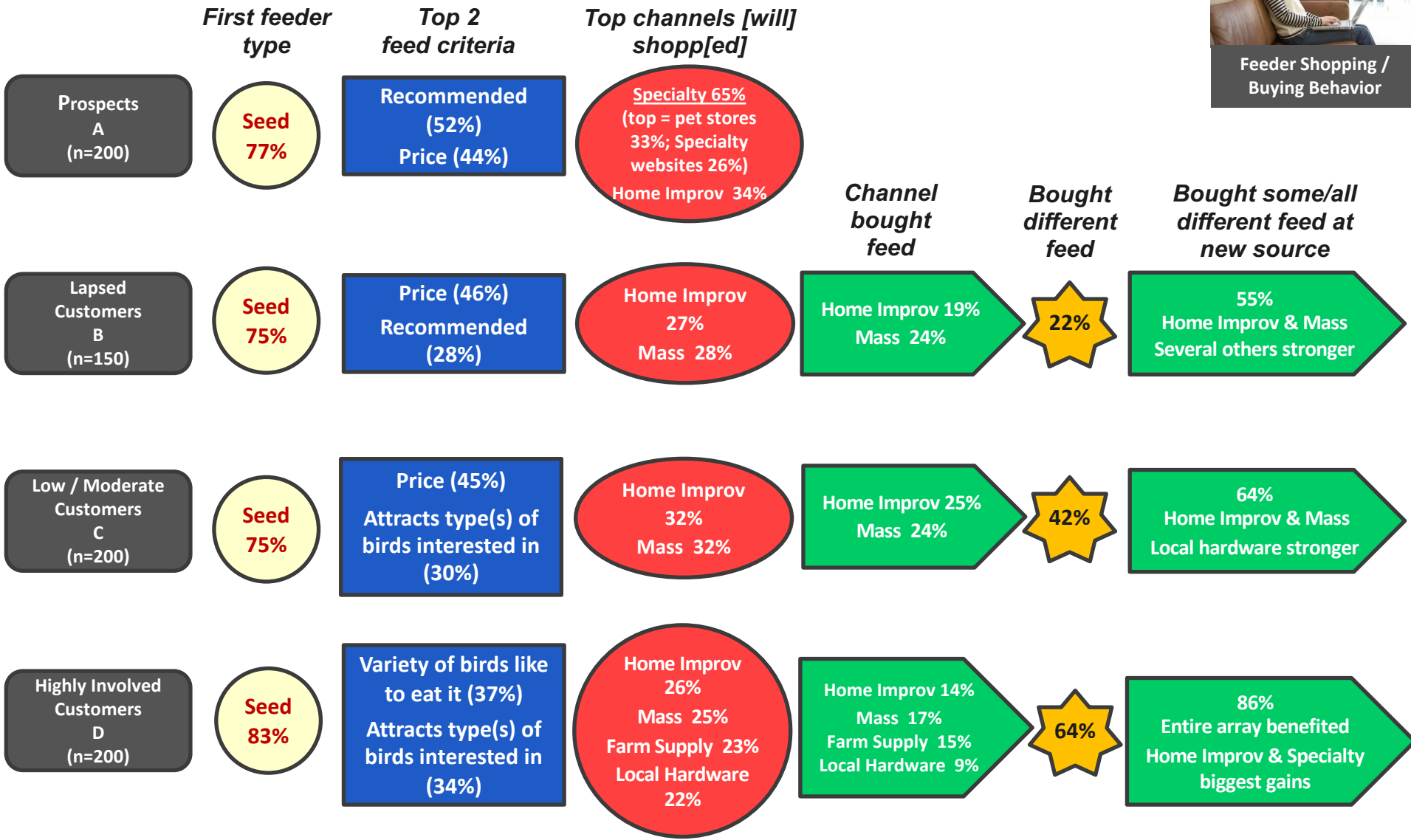
| | Total Customers | Lapsed Customers | Low / Moderate Customers | Highly Involved Customers |
|---|-----------------|------------------|--------------------------|---------------------------|
| (Base: Bought at Least Some Different Feed at Different Source) | (174) | (17)** | (49)* | (108) |
| | % | B % | C % | D % |
| Reasons for buying different feed at different source | | | | |
| Convenient location | 41 | | 53 D | 34 |
| Larger variety of wild bird seed, seed cakes, nectar or suet from which to choose | 34 | | 20 | 40 C |
| Higher quality wild bird seed, nectar or suet offered | 25 | | 16 | 31 C |
| Wanted to improve my results so looked for new ideas / products | 22 | | 14 | 26 |
| Can buy everything I need for wild bird feeding from these new sources | 18 | | 16 | 19 |
| Recommendation from a family member / friend | 16 | | 20 | 16 |
| Needed / wanted expert advice | 14 | | 10 | 18 |
| Offers products not available elsewhere | 12 | | 6 | 16 C |
| The place from which I bought my first wild bird seed, nectar or suet did not have what I was looking for | 12 | | 6 | 16 C |
| Low or no shipping fees for items delivered to my home | 11 | | 12 | 10 |
| Has a loyalty / rewards program | 11 | | 10 | 13 |
| Like the personal service I receive from the new source(s) | 11 | | 10 | 12 |
| Website is easy to navigate | 11 | | 4 | 15 C |
| Easier to order online | 8 | | 4 | 9 |

*Small base size (under 50); use caution when analyzing. . **Very small base size (under 30); too small to show data.

Q.22 You indicated you purchased different varieties of wild bird seed, seed cakes, nectar or suet, or different types of wild bird feed through new sources. What prompted you to use the new source(s)?

B/C/D = Significantly higher than corresponding group with 95% confidence

Feed Process Highlights





Messaging

Consumer Evaluation of Messages: Summary



- *Highly Involved Customers* show a strong positive response to all six messages, giving higher marks than their counterparts.
- The **Beauty / Sensory** and **Independence** messages are top-ranking performers across the *Customer* segments. They are viewed as accurately describing feelings about feeding wild birds and motivating interest in feeding more often.
- **Curiosity** is clearly not as strong as the other messages.

| | Prospects | Lapsed Customers | Low / Moderate Customers | Highly Involved Customers |
|--|------------|------------------|--------------------------|---------------------------|
| (Base: Total) | A (200) | B (150) | C (200) | D (200) |
| Describes feelings about wild bird feeding (5,4 rating) | | | | |
| Beauty / Sensory | 52% | 46% | 55% | 80% ABC |
| Family | 47% BC | 35% | 35% | 69% ABC |
| Independence | 47% | 47% | 51% | 79% ABC |
| Idealism | 46% BC | 35% | 31% | 67% ABC |
| Tranquility | 46% | 39% | 42% | 73% ABC |
| Curiosity | 33% BC | 21% | 24% | 60% ABC |
| Motivates interest (extremely / very interested) | | | | |
| Beauty / Sensory | 48% B | 35% | 41% | 78% ABC |
| Family | 40% B | 25% | 32% | 69% ABC |
| Independence | 43% | 37% | 41% | 75% ABC |
| Idealism | 39% BC | 27% | 29% | 66% ABC |
| Tranquility | 46% B | 31% | 38% | 74% ABC |
| Curiosity | 33% BC | 19% | 23% | 60% ABC |
| #1 ranking | | | | |
| Beauty / Sensory | 22% | 24% | 28% | 24% |
| Family | 27% C | 22% | 17% | 19% |
| Independence | 16% | 19% | 21% | 24% A |
| Idealism | 18% | 15% | 14% | 13% |
| Tranquility | 15% | 15% | 13% | 13% |
| Curiosity | 2% | 5% | 7% A | 7% A |

See Appendix for full message text

Q.8 (PROSPECTS AND CUSTOMERS) To what extent does this statement describe how you feel about wild bird feeding? (5-point scale; 5=completely describes and 1=does not describe at all)

Q.9 (PROSPECTS) After reading this statement, how interested are you in participating in wild bird feeding? (CUSTOMERS) After reading this statement, how interested are you in participating in wild bird feeding more often? (extremely interested; very interested; somewhat interested; not very interested; not at all interested)

Q.10 (PROSPECTS) Please rank order the statements, with #1 being the statement that makes you **most interested in participating in wild bird feeding** and #6 being the statement that makes you **least interested in participating in wild bird feeding**. (CUSTOMERS) Please rank order the statements, with #1 being the statement that makes you **most interested in participating in wild bird feeding more often** and #6 being the statement that makes you **least interested in participating in wild bird feeding more often**.

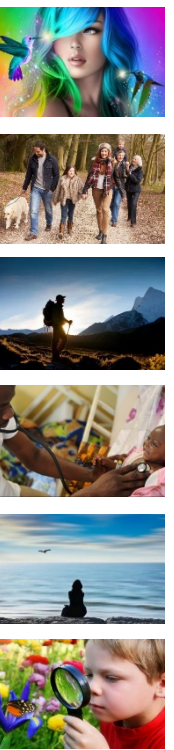
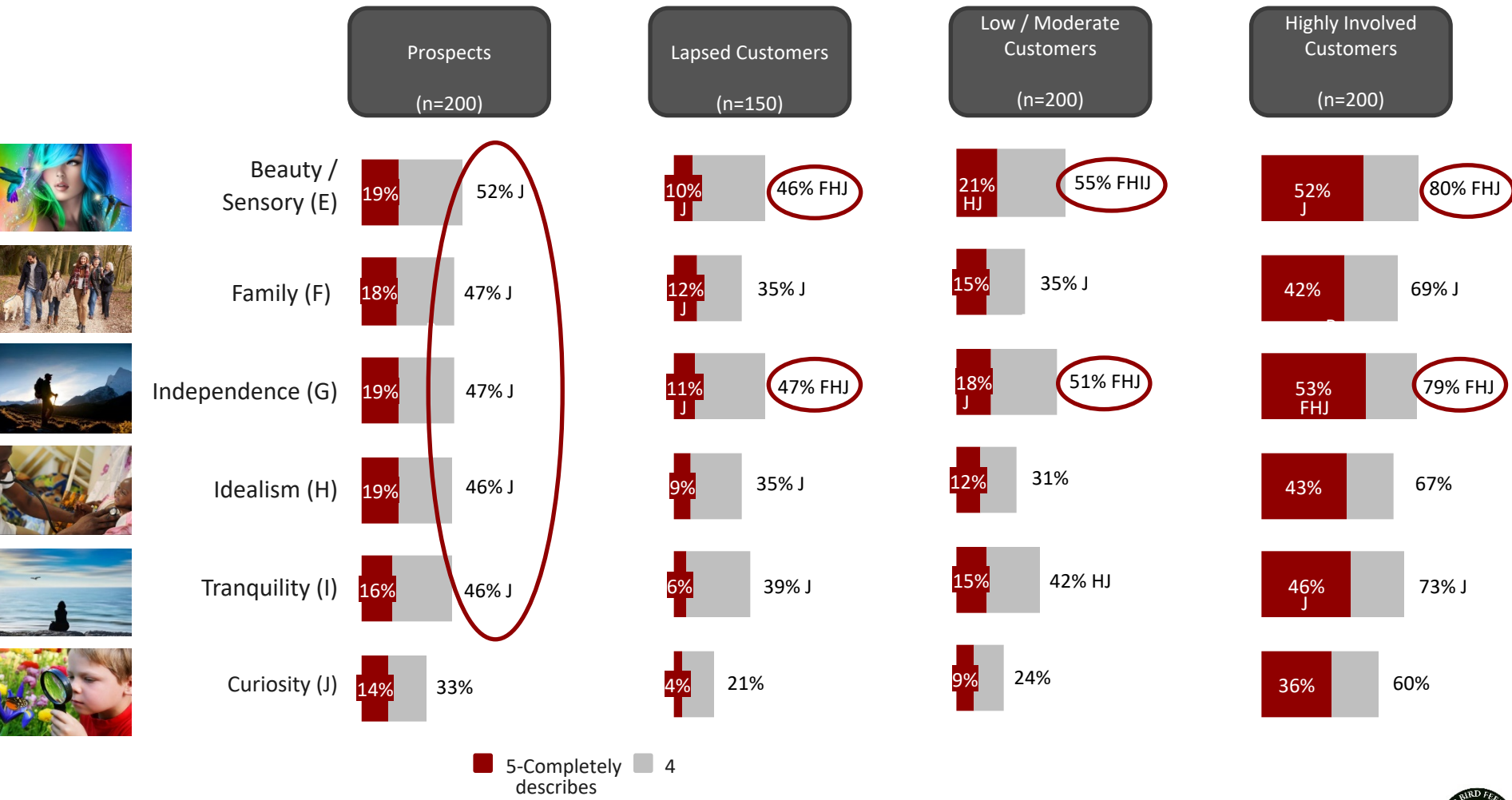
A/B/C/D = Significantly higher than corresponding group with 95% confidence

How Message Reflects Feelings about Feeding

- Five of the 6 messages are at parity for describing *Prospects'* feelings about feeding wild birds. **Curiosity** is weaker.
- Among *Customers*, two messages best capture feelings about feeding wild birds—**Beauty / Sensory** and **Independence**.



Top-2-Box Summary



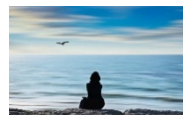
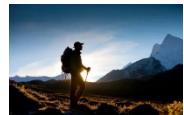
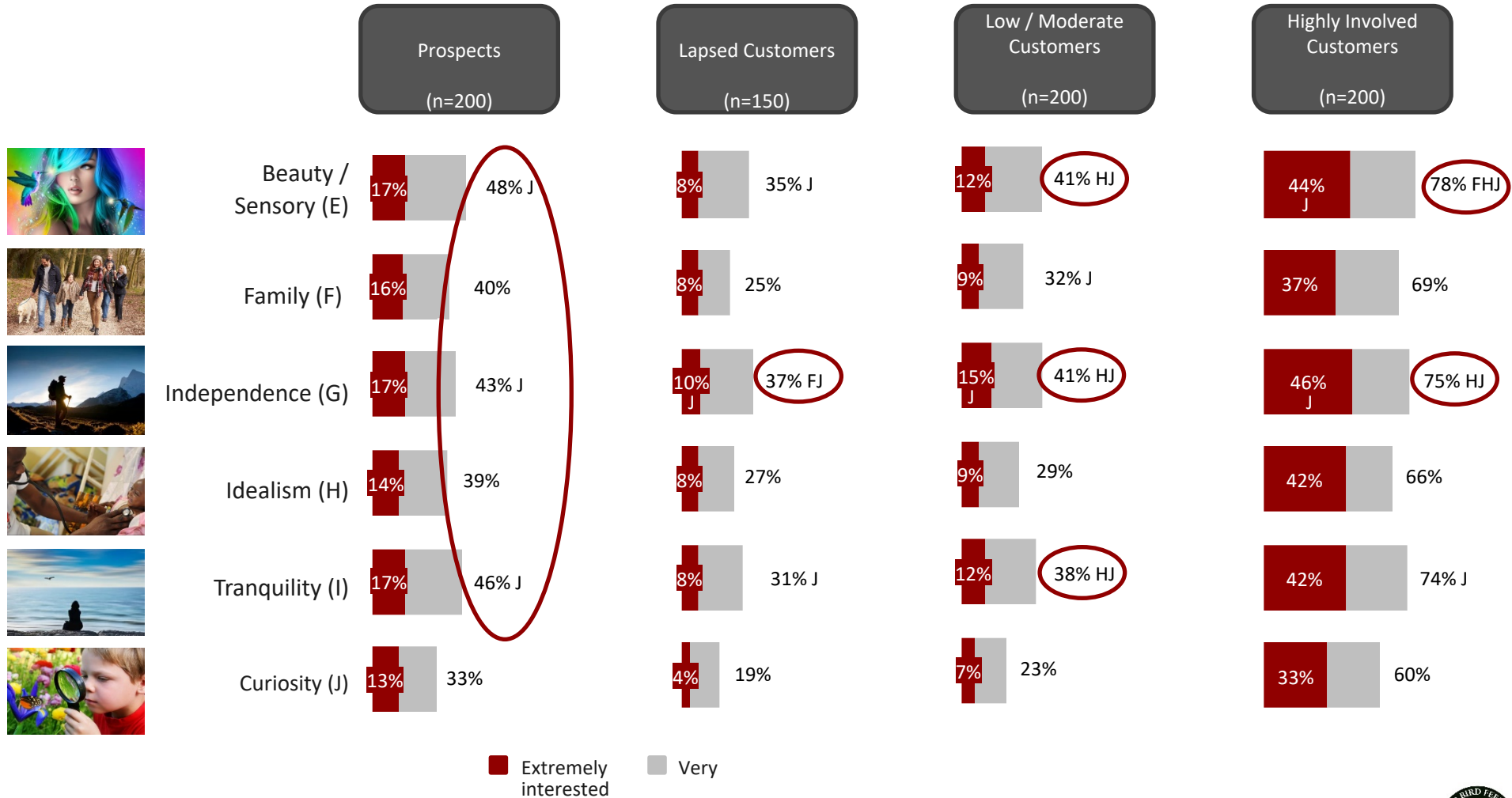
Q.8 (PROSPECTS AND CUSTOMERS) To what extent does this statement describe how you feel about wild bird feeding? (5-point scale; 5=completely describes and 1=does not describe at all)
E/F/G/H/I/J



How Message Motivates Interest in Feeding / Feeding More Often

- With regard to motivating *Prospect* interest in feeding, 5 of the 6 messages are on par—the exception is **Curiosity**, which sinks below the others.
- For *Customers*, **Beauty / Sensory** and **Independence** are the strongest motivators for more-often feeding. **Tranquility** also sparked heightened interest among *Low/Moderate Customers*.

Top-2-Box Summary



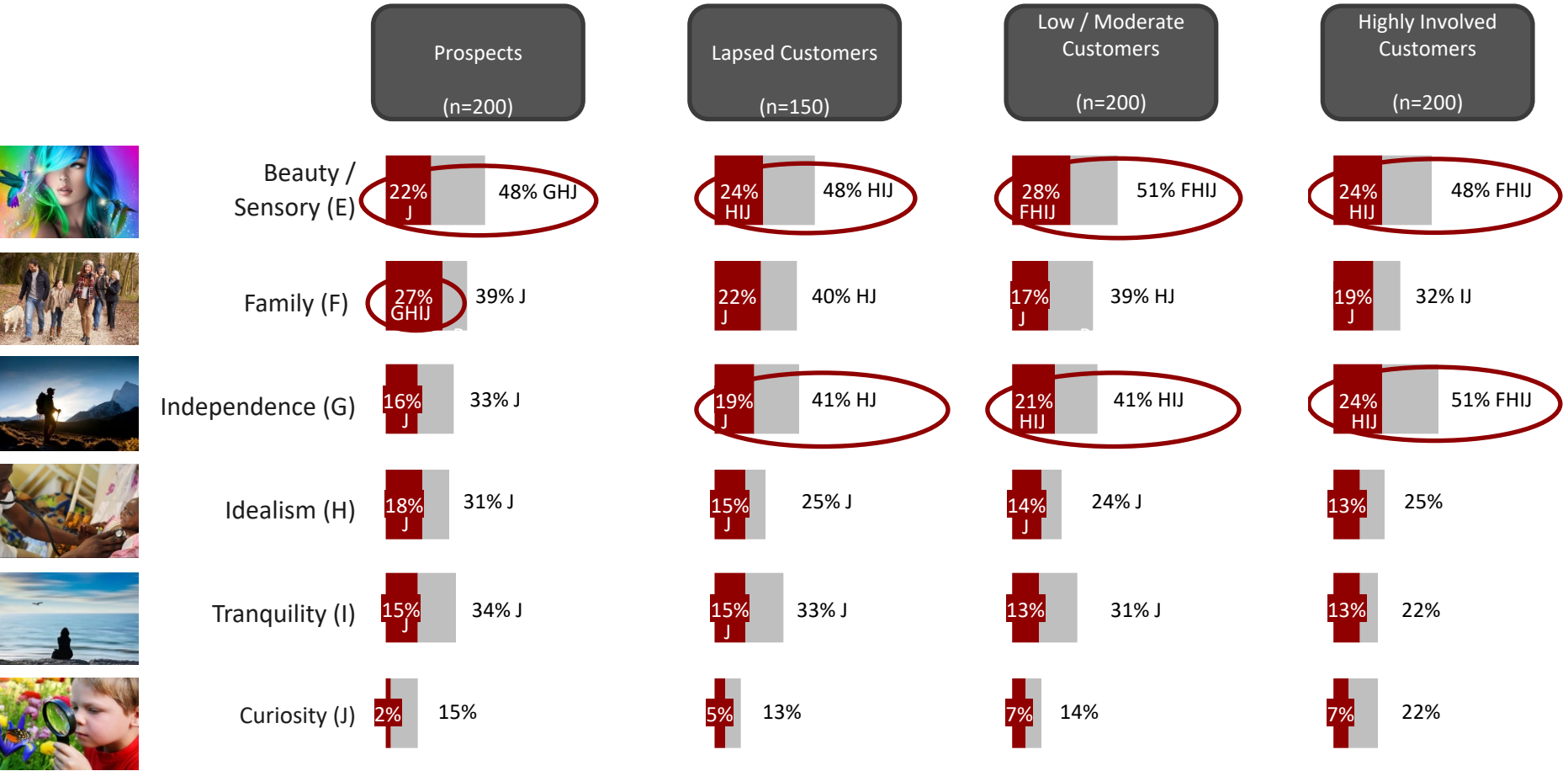


Messaging

Message Ranking

- **Family** rises to the top for one-quarter of *Prospects*, but **Beauty / Sensory** has wider appeal.
- *Customers* gravitate more strongly toward **Beauty / Sensory** and **Independence**; **Beauty / Sensory** has an edge among *Lapsed* and *Low / Moderate Customers*.

#1 / #2 Ranking Summary



■ Ranked #1 ■ #2

Q.10 (PROSPECTS) Please rank order the statements, with #1 being the statement that makes you **most interested in participating in wild bird feeding** and #6 being the statement that makes you **least interested in participating in wild bird feeding**. (CUSTOMERS) Please rank order the statements, with #1 being the statement that makes you **most interested in participating in wild bird feeding more often** and #6 being the statement that makes you **least interested in participating in wild bird feeding more often**. E/F/G/H/I/J = Significantly higher than corresponding group with 95% confidence

What Messaging Conveys About Wild Bird Feeding: Verbatim Summaries

Beauty / Sensory



- **Current Customers:**
- Many thought the statement conveyed the idea that wild bird feeding connects you to the beauty of nature.
- Some said it suggested wild bird feeding is a great way to attract different birds that are enjoyable to watch, and others said it would allow them to enjoy the different sounds of birds.
- Several interpreted it as saying wild bird feeding adds to the quality of life and allows you to experience nature in daily life.
- Several felt the statement was *“too much”* and *“over the top.”*
- **Lapsed Customers:**
- Many noted the statement conveyed the idea that wild bird feeding allows them to experience the beauty of nature and interact with it.
- Some thought it generated the feeling that wild bird feeding would be an enjoyable activity.
- Several described the message as *“over the top.”*
- **Prospects:**
- Many thought the statement conveyed the idea that wild bird feeding would allow you to connect with and experience nature.
- Many also felt the message expressed the feeling that wild bird feeding can be peaceful and enjoyable.

Family



- **Current Customers:**
- Many stated the message communicated that wild bird feeding is a way to connect with family.
- Some thought it conveyed wild bird feeding can be used to share an appreciation of and respect for nature with a younger generation.
- Some said it made them feel wild bird feeding can be fun for all ages.
- Several stated the message does not apply to them since they do not have children.
- **Lapsed Customers:**
- Most felt the message conveyed the notion that wild bird feeding can create family memories and become a family tradition.
- **Prospects:**
- Many thought the message imparted that wild bird feeding would allow one to spend time with family.
- Some felt wild bird feeding would allow an opportunity to educate children about nature and wild birds.

What Messaging Conveys About Wild Bird Feeding: Verbatim Summaries (cont'd)

Independence



- **Current Customers:**
- Many felt the message expressed that wild bird feeding keeps you connected with nature.
- Some thought it imparted that wild bird feeding allows you to slow down and enjoy the moment.
- Some thought the message implied wild bird feeding is “relaxing” and “calming.”
- **Lapsed Customers:**
- Many agreed the message conveyed that wild bird feeding allows you to enjoy the outdoors.
- Some felt it said wild bird feeding provides an outlet from a busy life.
- **Prospects:**
- Many thought the message conveyed that wild bird feeding connects you with nature.
- Some agreed wild bird feeding could be a relaxing activity.
- Several felt wild bird feeding could provide time away for a hectic schedule.

Idealism



- **Current Customers:**
- Many thought the message imparted the idea that wild bird feeding helps the environment.
- Many felt it also said that feeding wild birds shows you care about nature.
- Several thought the message leaned toward fanatical.
- A few stated the message was an ethical view, implying wild bird feeding is the right thing to do.
- **Lapsed Customers:**
- Many agreed the message communicated that wild bird feeding can make someone feel they are doing something good for the environment.
- Some felt it implied wild bird feeding has a positive impact on the environment.
- Several thought the message reflected the views of animal rights activists.
- **Prospects:**
- Many felt the message conveyed that wild bird feeding is good for nature.
- Some thought it said wild bird feeding allows you to contribute to a positive habitat for wild birds.
- Several agreed the message politicizes the wild bird feeding activity.

What Messaging Conveys About Wild Bird Feeding: Verbatim Summaries (cont'd)

Tranquility



- **Current Customers:**
- Almost all interpreted the message as wild bird feeding is “calming,” “relaxing” and “peaceful.”
- Some thought it meant wild bird feeding allows you to maintain control over a small part of your life.
- A few felt the statement was “Zen-like.”
- **Lapsed Customers:**
- Many felt the statement conveyed that wild bird feeding can be a stress reliver.
- Some said it made them feel wild bird feeding would be “peaceful.”
- A few agreed the statement has a “yoga-like” or “Zen” feel.
- **Prospects::**
- Many interpreted the statement as wild bird feeding can help bring balance to your life.
- Some thought it conveyed wild bird feeding is “calming” and “relaxing.”

Curiosity



- **Current Customers:**
- Many thought the message imparted that wild bird feeding could create a learning experience about birds and nature.
- Some felt it said there would always be more to learn on the subject of wild bird feeding.
- Some agreed wild bird feeding could become a complex activity.
- Several thought the statement was “too strong” for their level of interest in wild bird feeding.
- While a few enjoy wild bird feeding, they are “not this passionate” about it.
- **Lapsed Customers:**
- Many thought the message conveyed wild bird feeding would be a great learning experience.
- Several felt they are not this committed to wild bird feeding.
- Through this message, a few interpreted wild bird feeding as “work” rather than enjoyment.
- **Prospects:**
- Many felt the message stated wild bird feeding can be educational.
- Some thought it meant wild bird feeding is an activity you can grow with.
- A few agreed that wild bird feeding can start as a hobby and later become a passion.



Respondent Profiles

Respondent Profiles: Demographics

- Prior to survey launch, a screening balanced to the U.S. Census was conducted to determine the representative proportions of these four demographic characteristics among the four segments under study.
- *Prospects* are the youngest group and have the highest proportion of non-Caucasians.
- Among *Customers*, *Lapsed* have the highest concentration of Gen X'ers, skew Caucasian and Midwest. *Low/Moderates* tilt female, Caucasian and located in the Northeast. *Highly Involved Customers* skew male and are the oldest group



| | Prospects | Lapsed Customers | Low / Moderate Customers | Highly Involved Customers |
|--------------------------------------|-----------------|------------------|--------------------------|---------------------------|
| (Base: Total Respondents) | (200) A % | (150) B % | (200) C % | (200) D % |
| Gender | | | | |
| Male | 42 | 50 C | 40 | 63 ABC |
| Female | 58 D | 50 D | 60 BD | 37 |
| Age | | | | |
| 21 to 34 years (Millennials / Gen Y) | 35 BD | 21 | 29 D | 14 |
| 35 to 53 years (Gen X) | 39 | 48 CD | 36 | 35 |
| 54 to 70 years (Baby Boomers) | 26 | 31 | 35 A | 51 ABC |
| Average age | 42.1 | 45.4 A | 45.4 A | 50.9 ABC |
| Race / ethnicity | | | | |
| Caucasian / White | 63 | 87 AD | 88 AD | 77 A |
| <u>Non-Caucasian (Net)</u> | <u>43</u> BCD | <u>21</u> | <u>17</u> | <u>30</u> C |
| African-American / Black | 14 BC | -- | 4 B | 9 BC |
| Asian | 7 BC | -- | 2 | 3 B |
| Hispanic / Latino | 20 C | 19 C | 12 | 18 |
| Some other race or ethnicity | 3 | 2 | 1 | 1 |
| Region | | | | |
| Northeast | 14 | 17 | 28 ABD | 15 |
| Midwest | 18 | 28 AD | 25 | 17 |
| South | 39 C | 38 C | 21 | 43 C |
| West | 29 B | 17 | 26 B | 25 |

Quotas were established to ensure the sample segments represented their demographics within the contiguous U.S. population for gender, Age, Race / ethnicity and region

Q.A, B, C, D

A/B/C/D = Significantly higher than corresponding group with 95% confidence



Respondent Profiles

Respondent Profiles: Demographics (cont'd)

- A notable percentage of *Prospects* are single, live in an urban setting in a townhome/condominium or apartment that they do not own.
- All *Customers* are highly likely to be married and living in a single-family home they own. *Lapsed Customers* are more suburban, while *Low/Moderates* have a notable proportion living in a rural area.

| | Prospects | Lapsed Customers | Low / Moderate Customers | Highly Involved Customers |
|------------------------------|---------------|------------------|--------------------------|---------------------------|
| (Base: Total Respondents) | (200) | (150) | (200) | (200) |
| | A | B | C | D |
| | % | % | % | % |
| Residential area type | | | | |
| Urban | 31 BC | 13 | 18 | 25 B |
| Suburban | 54 | 64 CD | 51 | 50 |
| Small town / village | 6 | 12 | 9 | 8 |
| Rural | 9 | 11 | 22 AB | 17 A |
| | | | | |
| Home type | | | | |
| Single-family home | 66 | 82 A | 91 AB | 86 A |
| Duplex | 3 | 3 | 2 | 3 |
| Townhome / condominium | 10 CD | 5 | 4 | 4 |
| Apartment | 21 BCD | 10 C | 3 | 7 |
| | | | | |
| Whether own / rent | | | | |
| Own | 63 | 79 A | 87 A | 86 A |
| Rent | 37 BCD | 21 | 13 | 14 |
| | | | | |
| Marital status | | | | |
| Married / co-habiting | 52 | 68 A | 72 A | 73 A |
| <u>Not Married (Net)</u> | <u>47 BCD</u> | <u>31</u> | <u>28</u> | <u>27</u> |
| Single, never married | 37 BCD | 20 | 17 | 16 |
| Separated / divorced | 9 | 10 | 8 | 6 |
| Widowed | 1 | 1 | 3 | 5 AB |
| Prefer not to answer | 1 | 1 | -- | -- |



Respondent Profiles

Respondent Profiles: Demographics (cont'd)

- About one in three have minor children at home.
- *Prospects* are less affluent than *Customers*, likely influenced by their younger skew and single status.

| | Prospects | Lapsed Customers | Low / Moderate Customers | Highly Involved Customers |
|---|-----------|------------------|--------------------------|---------------------------|
| (Base: Total Respondents) | (200) | (150) | (200) | (200) |
| | A | B | C | D |
| | % | % | % | % |
| Children under 17 years of age are present in household | 28 | 31 | 36 | 27 |
| Annual household income before taxes | | | | |
| Under \$30,000 | 13 | 10 | 9 | 8 |
| \$30,000 to \$49,999 | 16 B | 9 | 12 | 11 |
| \$50,000 to \$69,999 | 20 D | 13 | 16 | 11 |
| \$70,000 to \$89,999 | 13 | 18 | 12 | 13 |
| \$90,000 to \$99,999 | 8 | 4 | 10 B | 13 B |
| \$100,000 to \$119,999 | 10 | 13 | 12 | 13 |
| \$120,000 or more | 18 | 23 | 24 | 29 A |
| Average annual household income before taxes | \$76,080 | \$86,310 A | \$85,830 A | \$91,360 A |
| Prefer not to answer | 2 | 10 AD | 5 | 2 |



Respondent Profiles

Respondent Profiles: Feeding Behavior

- A majority of *Lapsed Customers* stopped wild bird feeding within the first two years. They skewed toward seasonal feeding.
- *Low / Moderate Customers* have been feeding wild birds for 7 years, on average, and tend to be engaged year-round. *Highly Involved Customers* have been feeding the longest, with almost 2 in 5 involved for over 10 years and the great majority feeding year-round.

| | Lapsed Customers | Low / Moderate Customers | Highly Involved Customers |
|--|------------------|--------------------------|---------------------------|
| (Base: Total Respondents) | (150) | (200) | (200) |
| | B | C | D |
| | % | % | % |
| <i>Length of time currently / previously feeding wild birds</i> | | | |
| Less than one year | 20 CD | 6 | 6 |
| 1 to 2 years | 36 CD | 20 | 20 |
| 3 to 5 years | 33 | 30 | 26 |
| 6 to 10 years | 7 | 17 BD | 9 |
| More than 10 years | 4 | 27 B | 39 BC |
| Average number of years | 3.1 | 7.0 B | 7.9 B |
| <i>Seasons typically feed wild birds currently / previously</i> | | | |
| Year-round | 43 | 63 B | 78 BC |
| <u>Seasonal (Net)</u> | <u>57</u> CD | <u>37</u> D | <u>22</u> |
| Spring | 32 D | 24 D | 11 |
| Summer | 25 D | 20 D | 10 |
| Fall | 21 D | 17 D | 6 |
| Winter | 21 CD | 13 | 9 |

Respondent Profiles: Feeding Behavior

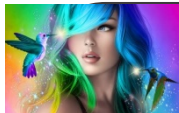
- By definition, *Highly Involved Customers* are the most enthusiastic about and committed to wild bird feeding. *Lapsed Customers* claim surprisingly more enthusiasm than would be expected.



| | Lapsed Customers | Low / Moderate Customers | Highly Involved Customers |
|--|------------------|--------------------------|---------------------------|
| (Base: Total Respondents) | (150) B % | (200) C % | (200) D % |
| Level of enthusiasm and commitment to wild bird feeding | | | |
| 10-Highest level | | | 47 |
| 9 | | | 31 |
| 8 | | 35 D | 22 |
| 7 | 25 | 23 | |
| 6 | 25 | 17 | |
| 5 | 23 | 18 | |
| 4 | 11 C | 4 | |
| 3 | 9 C | 3 | |
| 2 | 3 | | |
| 1-Lowest level | 4 | | |
| Average level | 5.2 | 6.6 B | 9.3 BC |



Appendix



Beauty / Sensory

I see and appreciate nature as a gift of beauty that is incomparable and seek to experience it as much as possible

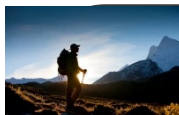
Wild bird feeding is an excellent way to experience the awesome sights, sounds, and splendid diversity of nature, bringing more beauty to my world every single day



Family

I see my family as the most important and enjoyable part of my life

Wild bird feeding provides a wonderful opportunity to share the joys and lessons of caring for nature with my children or grandchildren



Independence

Being outdoors and part of nature is where I feel most comfortable and alive

Wild bird feeding is a perfect way to maintain and enjoy a connection with nature, even in the midst of a busy life



Idealism

I am someone who is passionate about standing up for what is right and making the world a better place for all

Wild bird feeding is a meaningful way to care for the innocent creatures of nature and to help offset the negative impacts of modern life



Tranquility

I am someone who seeks to maintain balance, calm, and tranquility in my life

Wild bird feeding is a unique way to restore peace and balance to my life, even when the rest of the world around me is a little bit chaotic and crazy



Curiosity

I have an insatiable desire to learn all I can about the world around me

Wild bird feeding is a fascinating and endlessly interesting activity, with the potential to go from being a novice to achieving an expert's level of knowledge

Messaging Profiles: Demographics



| | Ranked #1 | | | | | |
|--|------------------|-----------|--------------|-----------|-------------|----------------|
| | Beauty / Sensory | Family | Independence | Idealism | Tranquility | Curiosity |
| (Base: Total) | (183) | (159) | (151) | (110) | (105) | (42)* |
| | E | F | G | H | I | J |
| | % | % | % | % | % | % |
| Segment | | | | | | |
| Prospects | 23 J | 34 EGJ | 21 | 32 J | 29 J | 12 |
| <u>Lapsed / Current Customer (Net)</u> | <u>77 F</u> | <u>66</u> | <u>79 F</u> | <u>68</u> | <u>71</u> | <u>88 EFHI</u> |
| Lapsed Customer | 20 | 21 | 19 | 21 | 21 | 17 |
| <u>Current Customer (Subnet)</u> | <u>57 F</u> | <u>45</u> | <u>60 FH</u> | <u>47</u> | <u>50</u> | <u>71 FHI</u> |
| Low / Moderate Customer | 31 | 21 | 28 | 24 | 25 | 35 |
| Highly Involved Customer | 26 | 24 | 32 | 23 | 25 | 36 |
| | | | | | | |
| Gender | | | | | | |
| Male | 53 H | 45 | 53 H | 38 | 52 H | 43 |
| Female | 47 | 55 | 47 | 62 EGI | 48 | 57 |
| | | | | | | |
| Average age | 47.7 I | 45.4 | 46.9 | 45.7 | 43.6 | 43.8 |
| Millennial / Gen Y (21 to 34 years) | 21 | 27 | 25 | 26 | 31 E | 29 |
| Gen X (35 to 53 years) | 37 | 40 | 39 | 40 | 37 | 45 |
| Baby Boomers (54 to 70 years) | 42 J | 33 | 36 | 34 | 32 | 26 |
| | | | | | | |
| Race / ethnicity | | | | | | |
| Caucasian / White | 83 HI | 77 | 81 | 73 | 71 | 83 |
| Non-Caucasian | 25 | 28 | 24 | 32 | 37 EG | 24 |

**Small base size (under 50); use caution when analyzing.
Q.A, Q.B, Q.C (multiple responses accepted)
E/F/G/H/I/J*

Messaging Profiles: Demographics (cont'd)



| | Ranked #1 | | | | | |
|--|------------------|----------|--------------|----------|-------------|-----------|
| | Beauty / Sensory | Family | Independence | Idealism | Tranquility | Curiosity |
| (Base: Total) | (183) | (159) | (151) | (110) | (105) | (42)* |
| | E | F | G | H | I | J |
| | % | % | % | % | % | % |
| Region | | | | | | |
| Northeast | 20 | 18 | 15 | 21 | 15 | 33 FGI |
| Midwest | 19 | 25 | 24 | 23 | 20 | 21 |
| South | 34 | 35 | 41 | 30 | 34 | 29 |
| West | 27 | 22 | 20 | 26 | 31 | 17 |
| Residence area type | | | | | | |
| Urban | 22 | 14 | 15 | 36 EFG | 29 FG | 31 FG |
| Suburban | 57 | 58 | 55 | 50 | 48 | 50 |
| Small town / village | 8 | 11 | 10 | 6 | 8 | 5 |
| Rural | 13 | 17 H | 20 H | 8 | 15 | 14 |
| Home type | | | | | | |
| Single-family home | 84 | 85 GH | 76 | 76 | 80 | 91 GH |
| Duplex | 2 J | 3 J | 3 J | 5 J | 1 | -- |
| Townhome / condominium | 5 | 6 | 8 | 4 | 7 | 2 |
| Apartment | 9 | 6 | 13 F | 15 F | 12 | 7 |
| Own home | 80 | 81 | 75 | 74 | 80 | 88 GH |
| Married | 61 | 78 EGHI | 64 | 60 | 65 | 76 EH |
| Children under 18 years are present in household | 27 | 46 EGHI | 28 | 23 | 25 | 31 |
| Average annual household income | \$84,500 | \$85,350 | \$83,650 | \$83,330 | \$84,140 | \$93,140 |

*Small base size (under 50); use caution when analyzing.
 Q.D, Q.25, Q.26, Q.27, Q.28, Q.29
 E/F/G/H/I/J = Significantly higher than corresponding group with 95% confidence



Messaging Profiles: Wild Bird Feeding Behavior



| | Ranked #1 | | | | | |
|---|------------------|-----------|--------------|-----------|-------------|---------------|
| | Beauty / Sensory | Family | Independence | Idealism | Tranquility | Curiosity |
| (Base: Current / Lapsed Customers) | (140) | (105) | (119) | (75) | (74) | (37)* |
| | E | F | G | H | I | J |
| | % | % | % | % | % | % |
| Length of time currently / previously feeding wild birds | | | | | | |
| Average number of years | 6.7 I | 5.7 | 6.9 I | 6.4 | 4.8 | 6.5 |
| | | | | | | |
| Seasons typically feed wild birds currently / previously | | | | | | |
| Year-round | 66 J | 61 | 69 J | 64 J | 62 | 43 |
| <u>Seasonal (Net)</u> | <u>34</u> | <u>39</u> | <u>31</u> | <u>36</u> | <u>38</u> | <u>57</u> EGH |
| Winter | 11 | 12 | 13 | 16 | 11 | 32 EFGI |

*Small base size (under 50); use caution when analyzing.
 Q.23, Q.24
 E/F/G/H/I/J = Significantly higher than corresponding group with 95% confidence

Motivations for Wild Bird Feeding



Top 5 Reasons to Feed Wild Birds - Top-2-Box Summary -



Ranked #1
Beauty / Sensory
(n=183)

Ranked #1
Family
(n=159)

Ranked #1
Independence
(n=151)

Ranked #1
Idealism
(n=110)

Ranked #1
Tranquility
(n=105)

Ranked #1
Curiosity
(n=42)*

Watching wild birds interact is entertaining (81%)

Watching wild birds interact is entertaining (72%)

Watching wild birds interact is entertaining (83%)

I feel like I help wild birds when I feed them (74%)

Feeding wild birds helps them during times when food is scarce (73%)

Watching wild birds interact is entertaining (81%)

Wild bird feeding reminds me that the world is filled with beauty (74%)

Wild bird feeding allows me to observe birds in their natural habitat (69%)

Wild bird feeding allows me to observe birds in their natural habitat (79%)

Feeding wild birds helps them during times when food is scarce (73%)

Wild bird feeding allows me to observe birds in their natural habitat (71%)

Wild bird feeding allows me to observe birds in their natural habitat (76%)

I love all animals, including birds, so feeding them brings me joy (72%)

I feel like I help wild birds when I feed them (69%)

Wild bird feeding reminds me that the world is filled with beauty (76%)

Watching wild birds interact is entertaining (72%)

Wild bird feeding adds beauty to my yard / garden (71%)

Feeding wild birds helps them during times when food is scarce (71%)

Wild bird feeding allows me to observe birds in their natural habitat (72%)

Feeding wild birds helps them during times when food is scarce (66%)

Feeding wild birds helps them during times when food is scarce (74%)

I love all animals, including birds, so feeding them brings me joy (72%)

I feel like I help wild birds when I feed them (69%)

Wild bird feeding is a great way to learn about the different types of birds in my area (69%)

I feel like I help wild birds when I feed them (69%)

Reason #8: Wild bird feeding with my children / grandchildren helps them appreciate and protect nature (58%)

Wild bird feeding adds beauty to my yard / garden (72%)

Wild bird feeding allows me to observe birds in their natural habitat (70%)

Watching wild birds interact is entertaining (68%)

Listening to wild birds chatter and sing is like listening to music (69%)

Feeding wild birds helps them during times when food is scarce (69%)

I feel connected to nature through wild bird feeding (69%)

**Small base size (under 50); use caution when analyzing.*

Q.1 (PROSPECTS) Please indicate the extent to which each statement describes why you would consider feeding wild birds.

(LAPSED CUSTOMERS) Please indicate the extent to which each statement describes why you used to feed wild birds.

(LOW / MODERATE / HIGHLY INVOLVED CUSTOMERS) Please indicate the extent to which each statement describes why you feed wild birds.

(5-point scale where 5="completely describes" and 1="does not at all describe")