



**RESEARCH
FOUNDATION**



USA & CANADA
WILD BIRD FEEDING INDUSTRY
YEARLY RESEARCH 2016

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

2016

Wave IV
yearly tracking study
18+ y.o.
USA & CA
N = 3200
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

CA

14.3 MM




7.0 MM (49.3%)

ESTIMATED NUMBER OF
HOUSEHOLDS IN 2011

OF HOUSEHOLDS BUY WILD BIRD FEED
AT LEAST SOMETIMES



 = 1,000,000 HOUSEHOLDS

USA

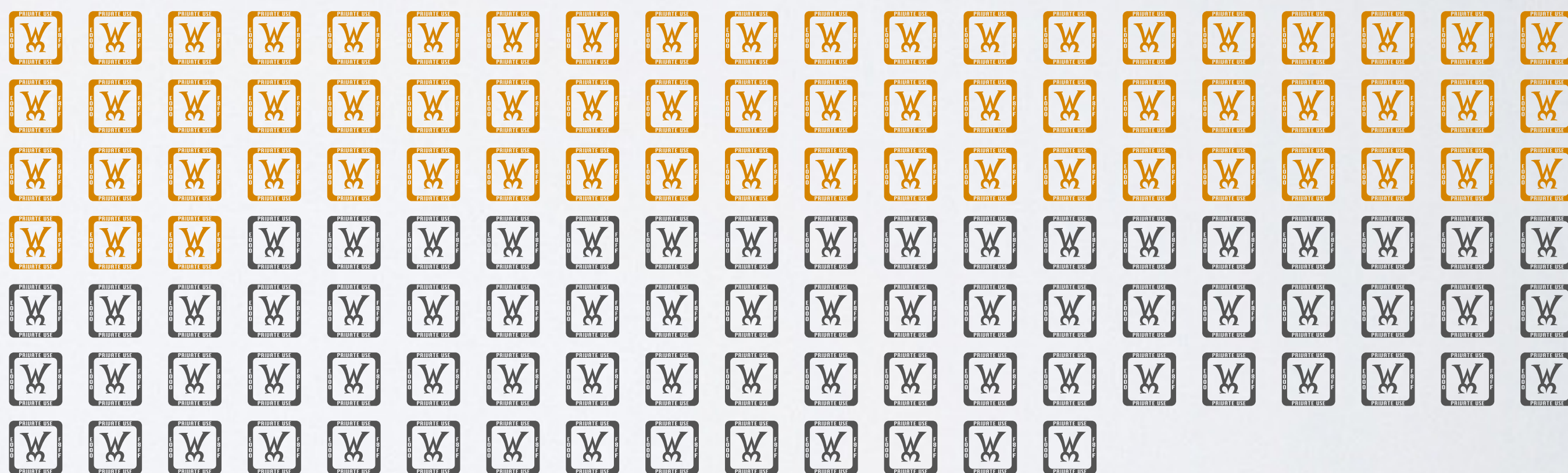
134.8 MM


ESTIMATED NUMBER OF
HOUSEHOLDS IN 2015



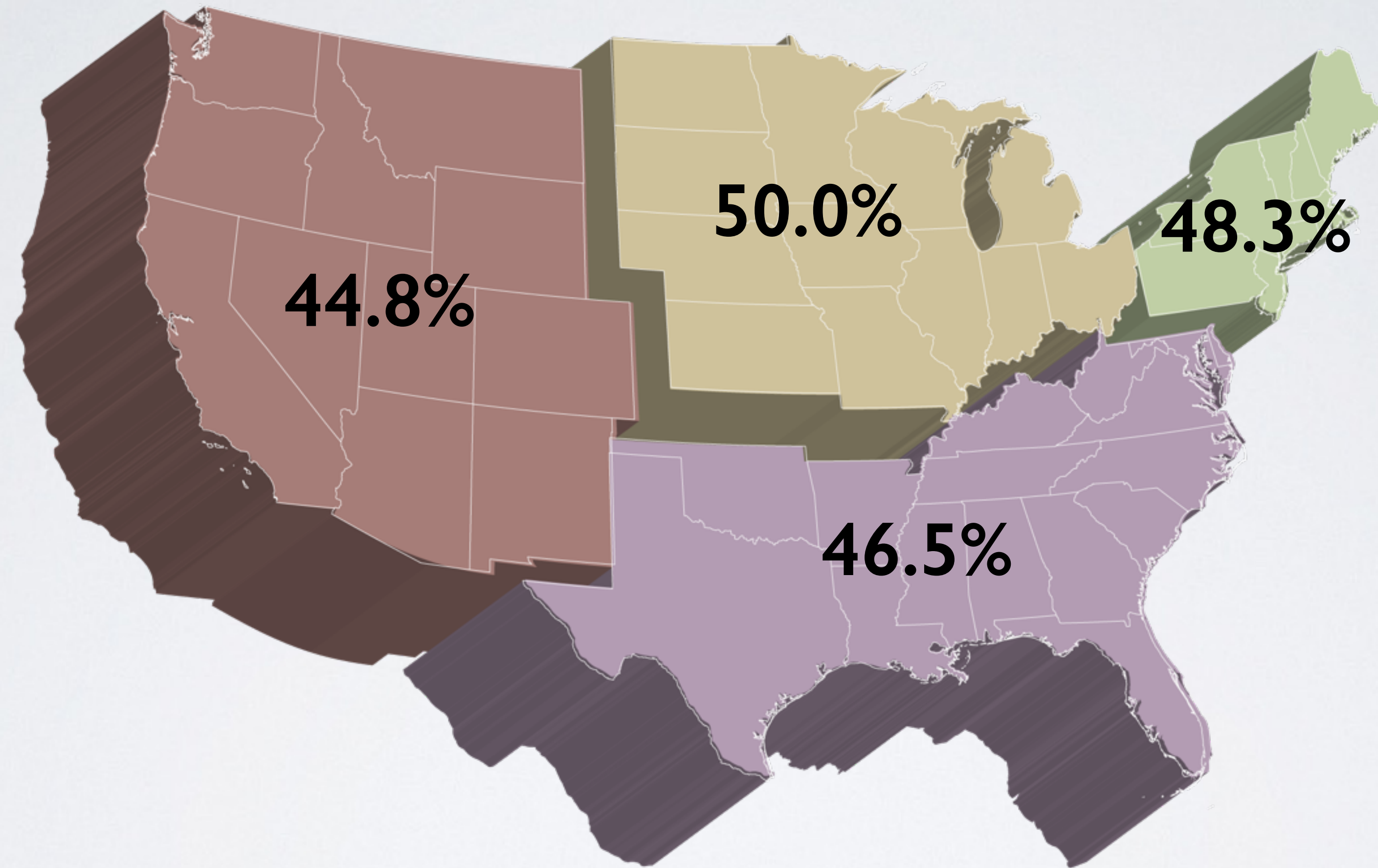
63.6 MM (47.2%)

OF HOUSEHOLDS BUY WILD BIRD FEED
AT LEAST SOMETIMES



 = 1,000,000 HOUSEHOLDS

MARKET SIZE BY USA REGIONS



WEST

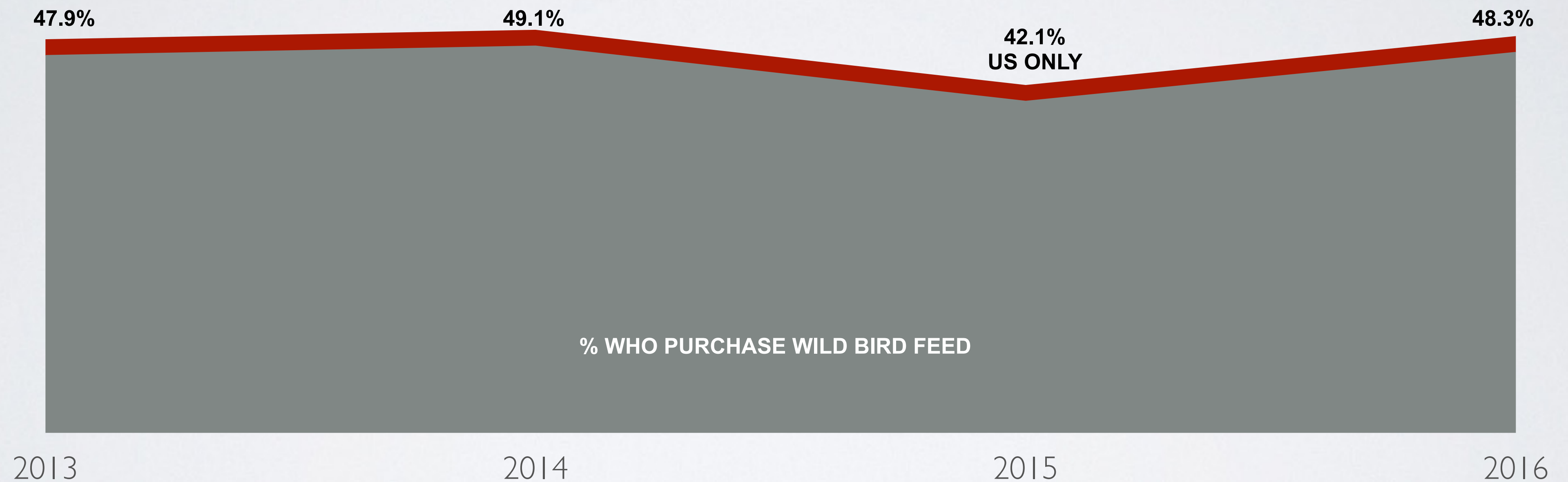
SOUTH

MIDWEST

NORTHEAST

GROWTH

BIRD FEEDING HAS BEEN CONSISTENT SINCE 2013.



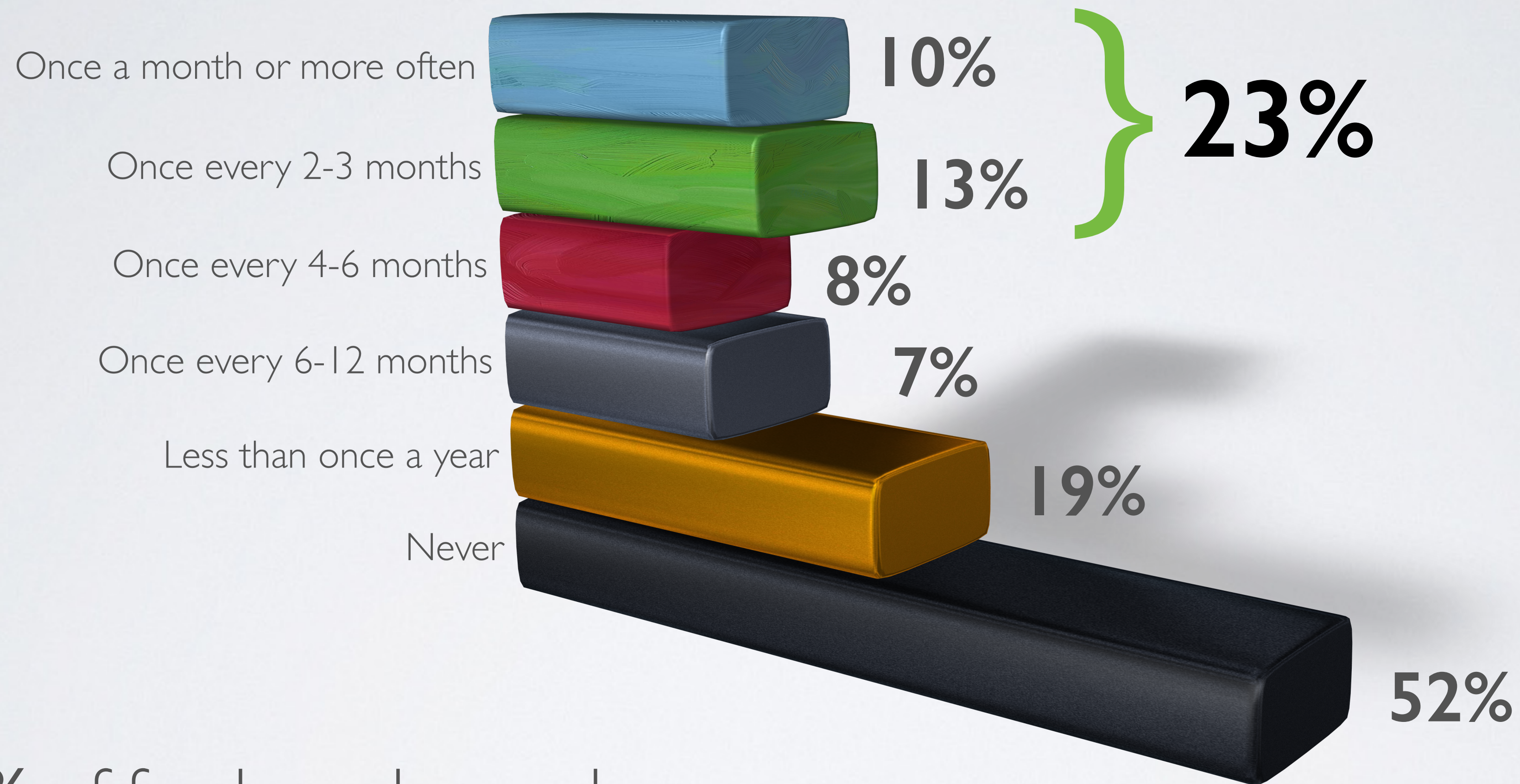
ADDITIONAL MARKET FINDINGS

- ABOUT HALF OF SHOPPERS BUY **WILD BIRD FEED** AT LEAST SOMETIMES.
- **64%** OF ALL FEED PURCHASERS BUY AT LEAST EVERY 6 MONTHS
- THE AVERAGE PURCHASER SPENDS AN AVERAGE OF **\$28** IN A TYPICAL MONTH IN THE US AND **\$31** IN CANADA.
- NEARLY HALF OF PURCHASERS SAY THEY WOULD SPEND \$20 OR MORE ON A NEW BIRD FEEDER.
- EXPECTATIONS ARE THAT **THE MARKET IS GROWING**. ALMOST 4 OUT OF 10 PURCHASERS EXPECT TO SPEND MORE THIS YEAR ON **WILD BIRD FEED AND FEEDERS**, AND MORE THAN HALF WILL MAINTAIN THEIR CURRENT SPENDING LEVEL.

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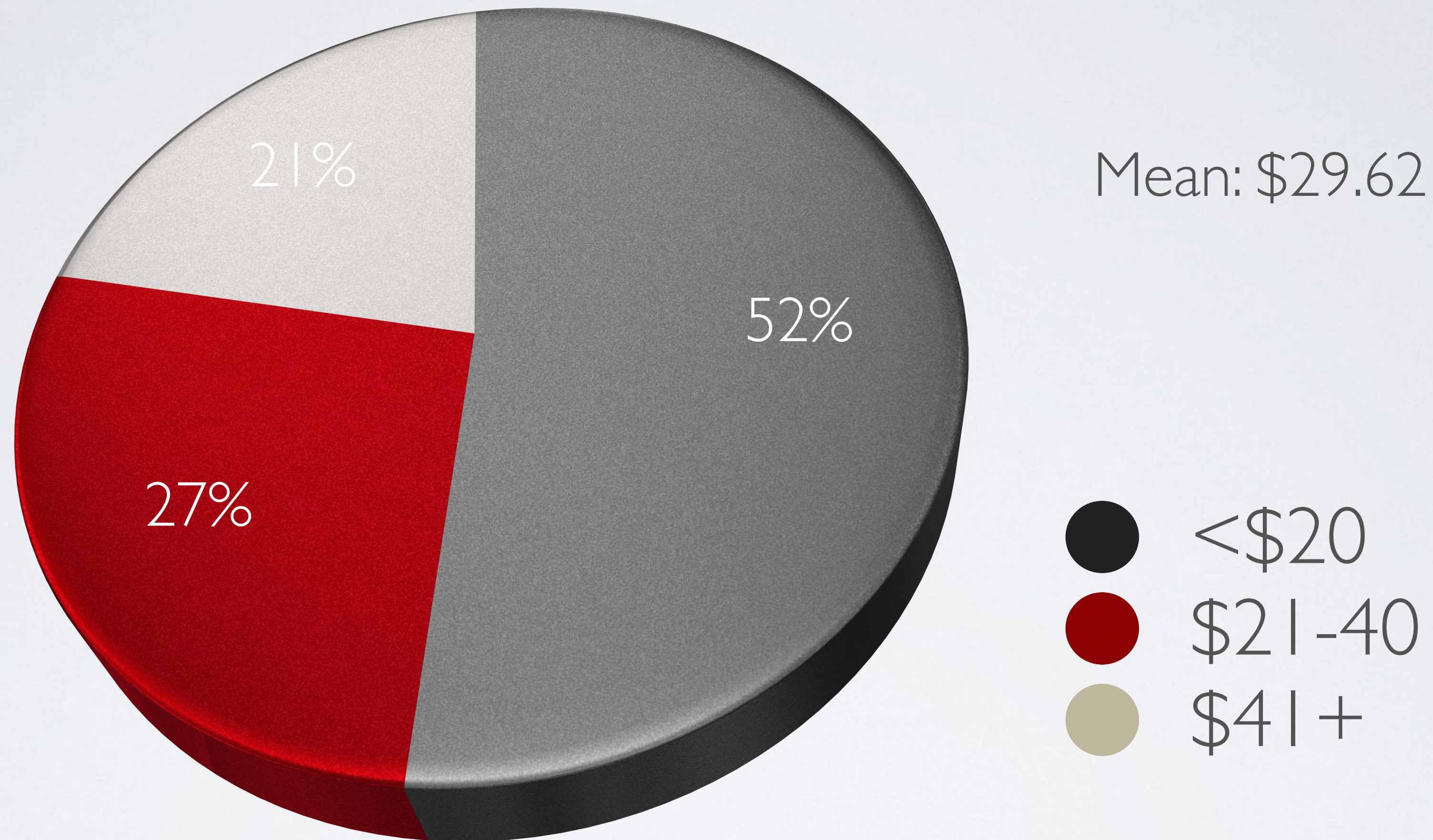
BIRD **FEED** SHOPPING HABITS
& PREFERENCES

HOW FREQUENTLY DO THEY BUY **FEED**?



23% of feed purchasers buy at least every 2-3 months

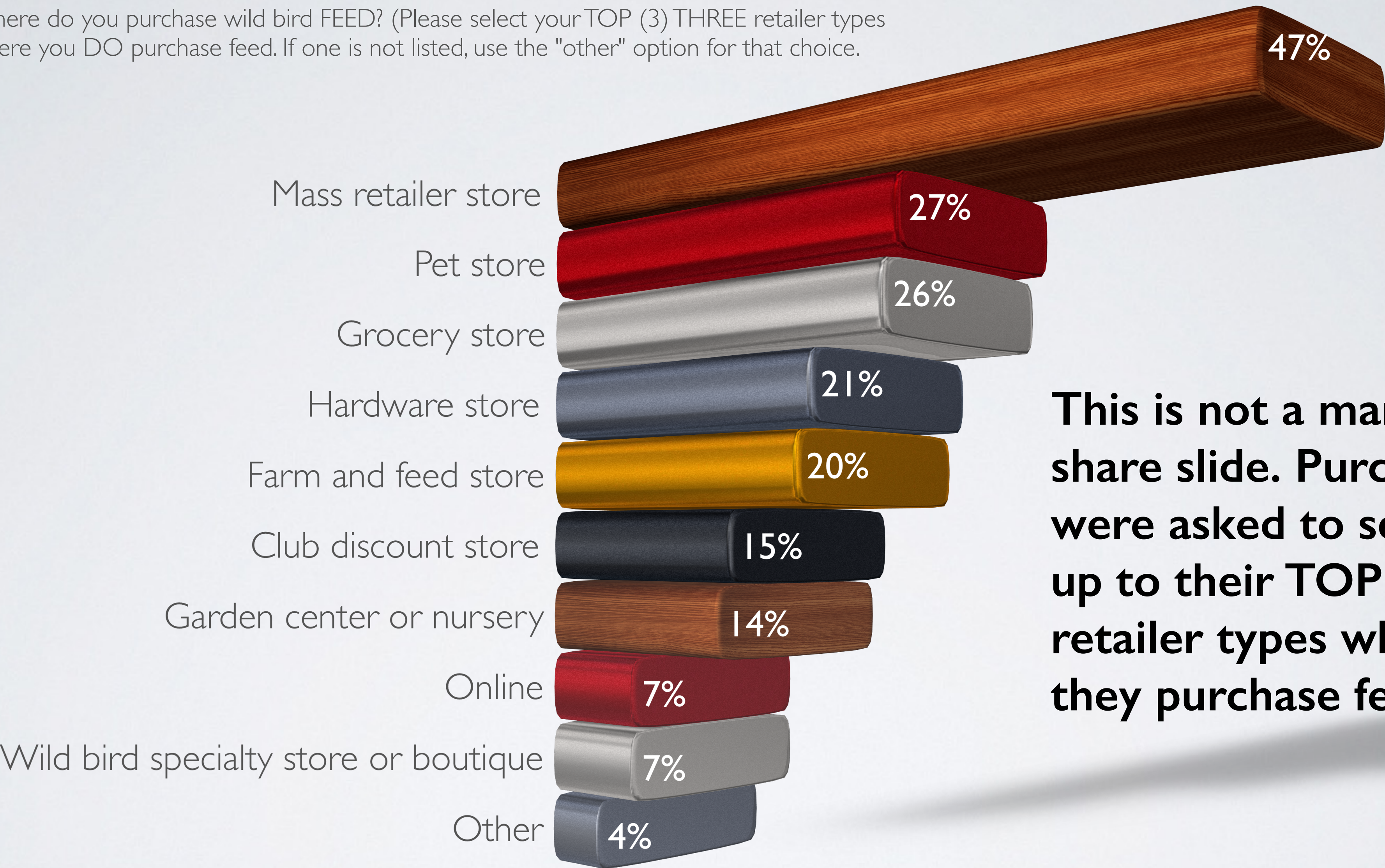
HOW MUCH DO THEY SPEND AT A TIME?



About how much money do you spend on wild bird
FEED in a typical month?

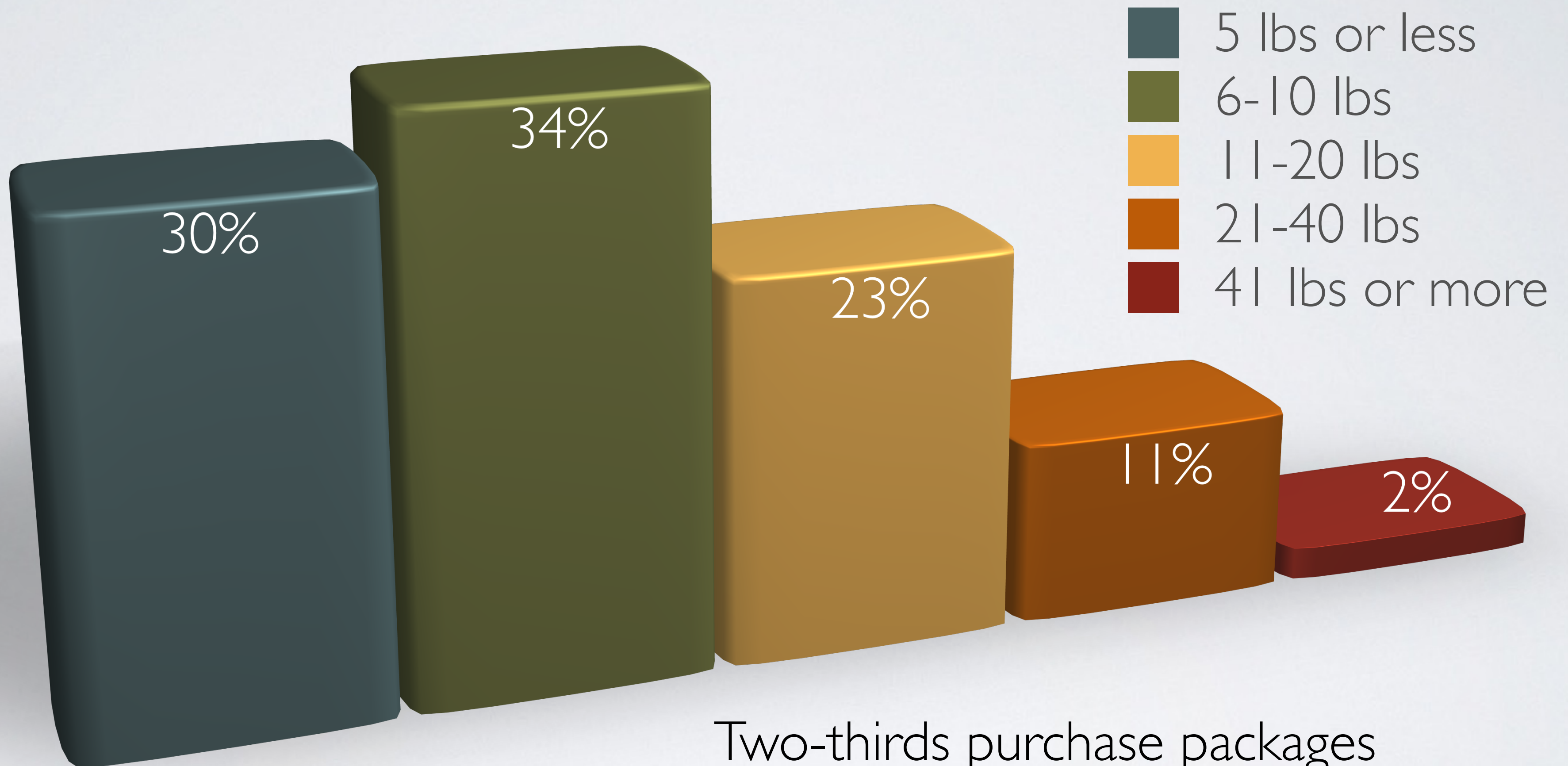
WHERE DO CONSUMERS CHOOSE TO BUY FEED ?

Where do you purchase wild bird FEED? (Please select your TOP (3) THREE retailer types where you DO purchase feed. If one is not listed, use the "other" option for that choice.



This is not a market share slide. Purchasers were asked to select up to their TOP 3 retailer types where they purchase feed.

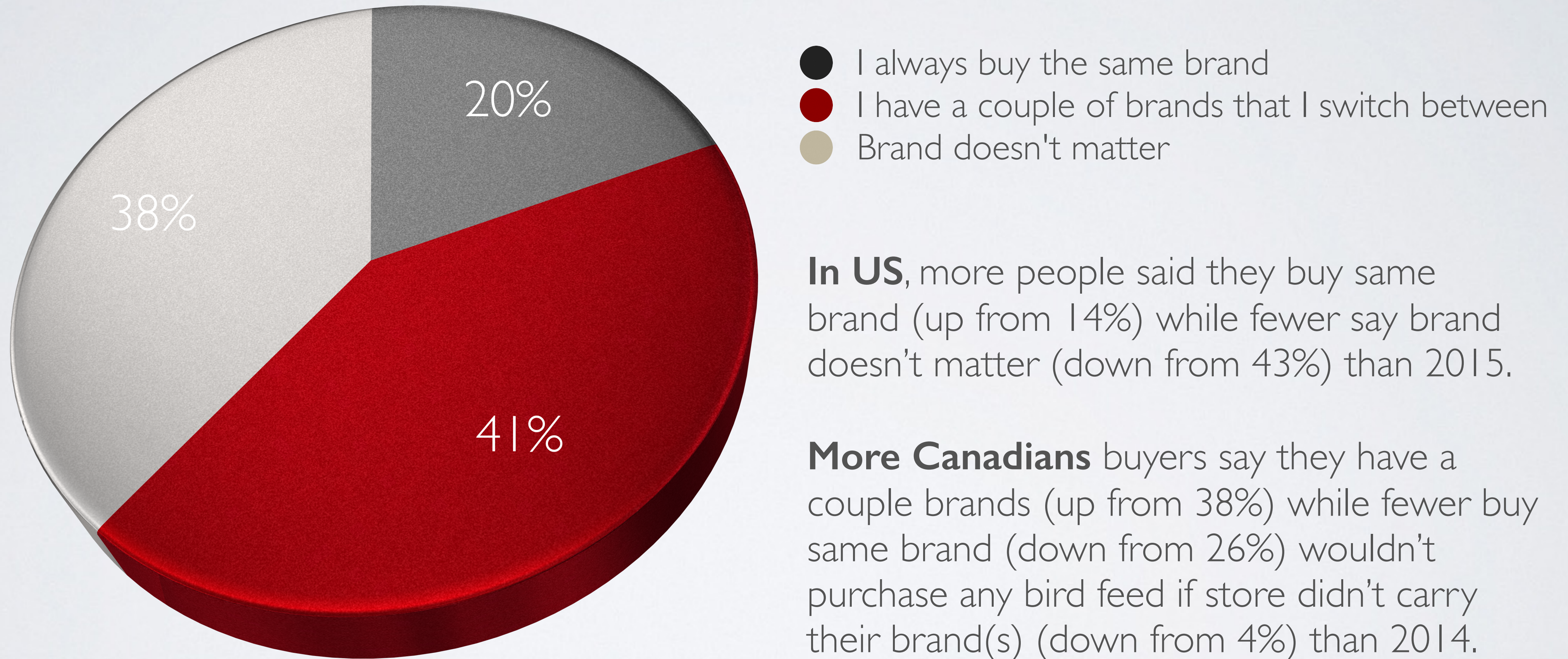
FEED PACKAGE SIZE



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

FEED BRAND LOYALTY

Almost two-thirds of purchasers are somewhat loyal to a brand, either buying the same product or switching between a couple of brands.



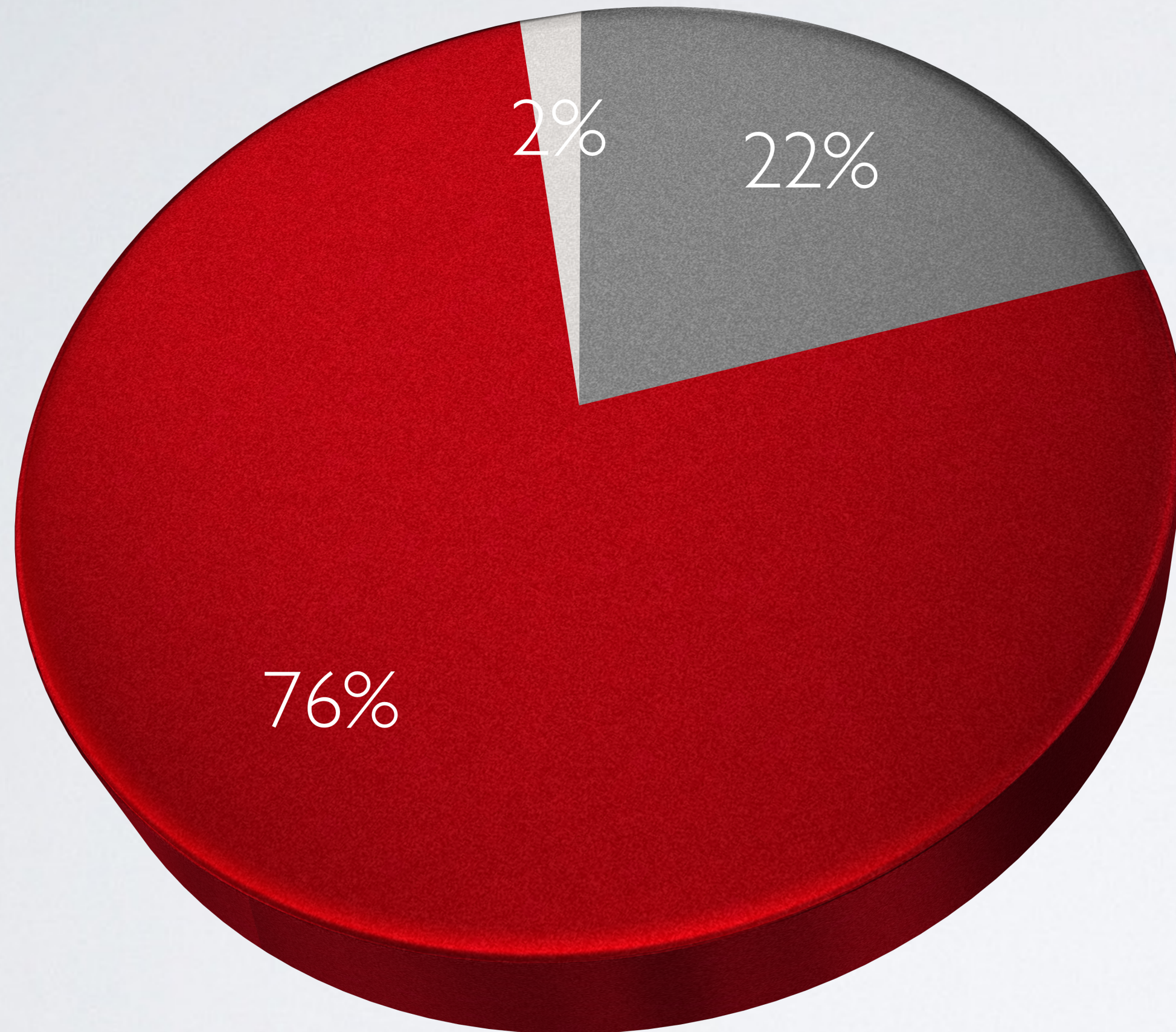
In US, more people said they buy same brand (up from 14%) while fewer say brand doesn't matter (down from 43%) than 2015.

More Canadians buyers say they have a couple brands (up from 38%) while fewer buy same brand (down from 26%) wouldn't purchase any bird feed if store didn't carry their brand(s) (down from 4%) than 2014.

FEED RETAILER LOYALTY

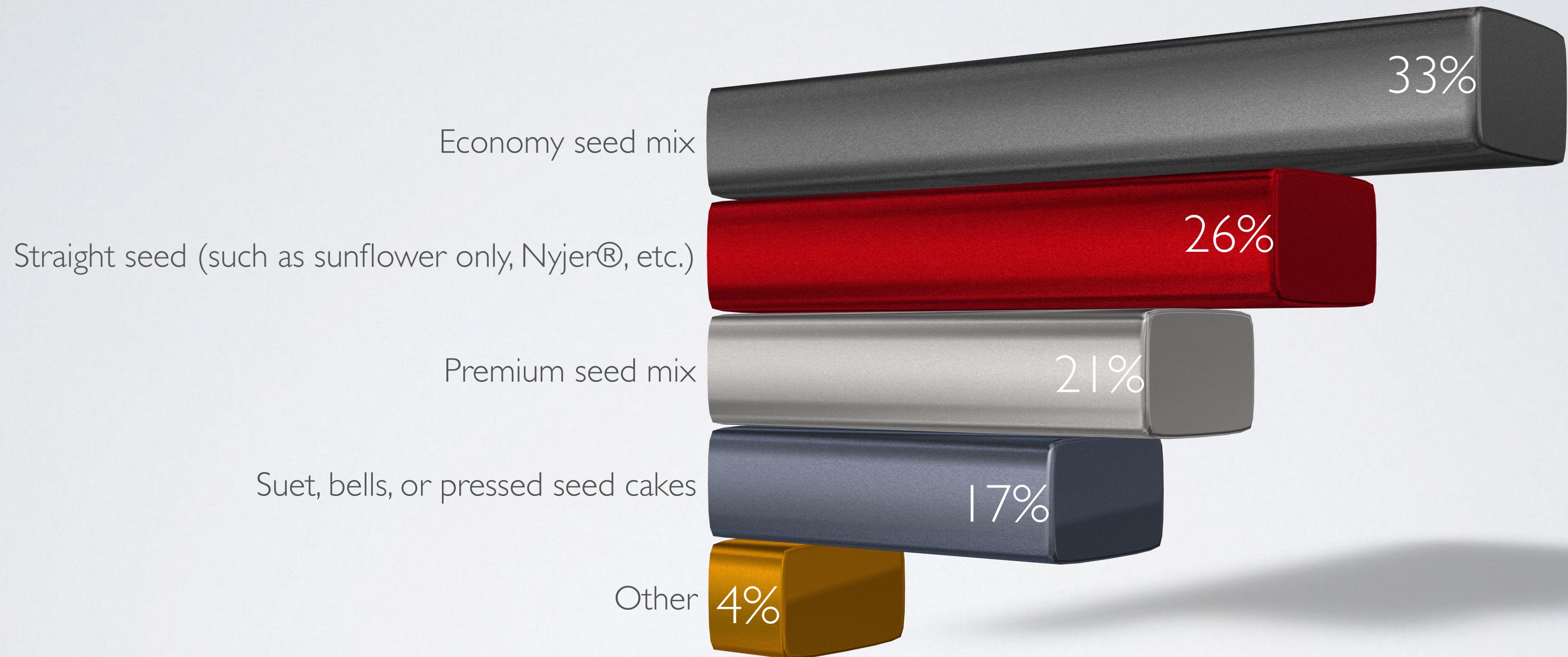
Which of the following best describes what you would most likely do if the store you buy from stops carrying your brand(s) of wild bird FEED?

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



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

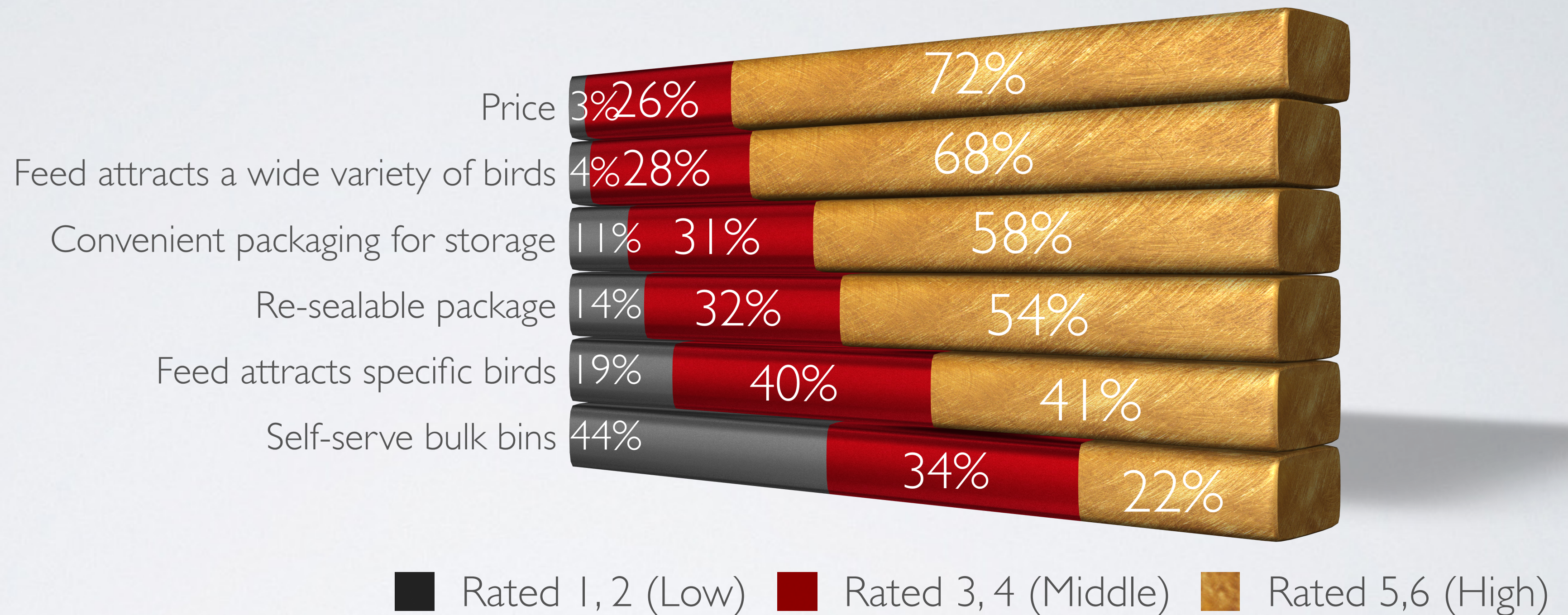
SHARE OF THE MARKET BY TYPES OF BIRD FEED



Economy seed is the most purchased, capturing **33%** of the dollars spent on bird feed in a typical year. **One-quarter** of the market goes to straight seed.

FEED PURCHASE DRIVERS

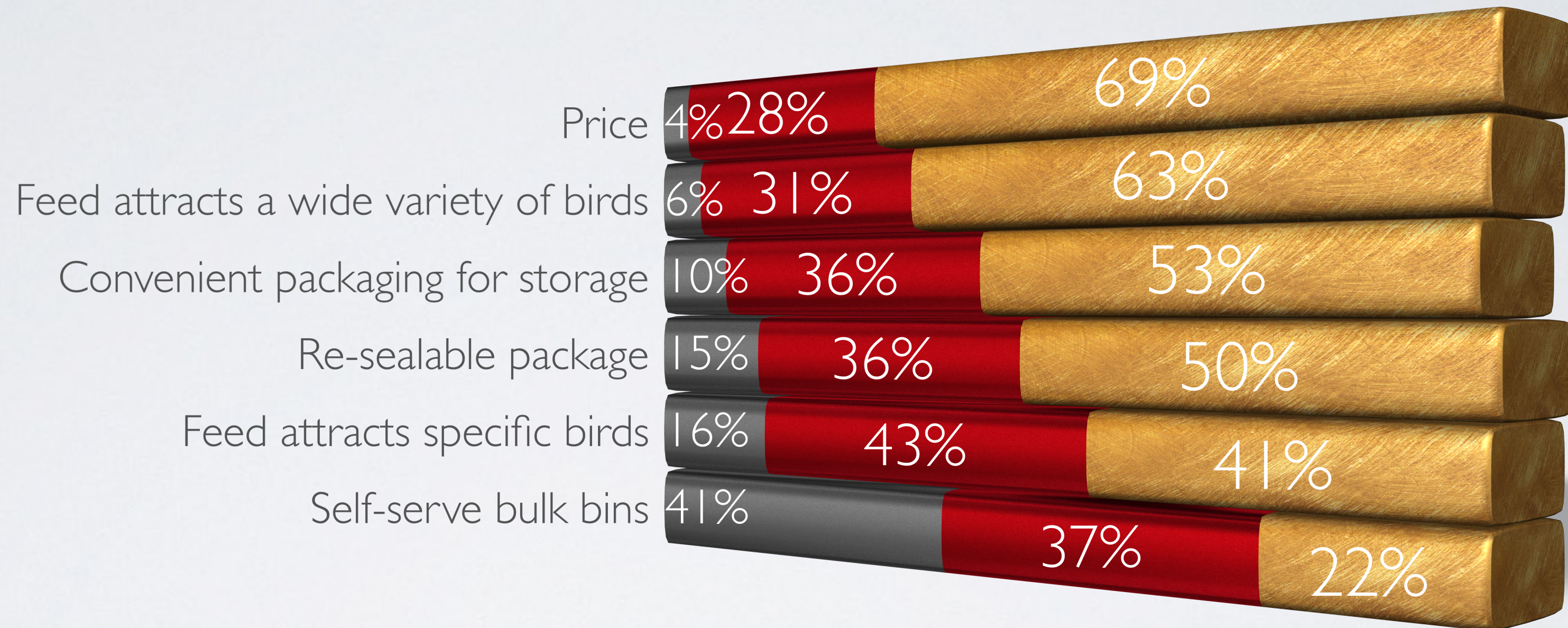
Importance went down from 2015 for packaging related benefits such as convenience for storage (down from 63%) and re-sealable packaging (down from 61%), putting importance of these package features on par with importance reported in 2014.



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

FEED PURCHASE DRIVERS

Importance increased for convenient packaging (up from 48%) from 2014. While being reported less important overall, importance for attracting specific birds (up from 33%) and being available in self-service bulk bins (up from 18%) also increased.



■ Rated 1, 2 (Low) ■ Rated 3, 4 (Middle) ■ Rated 5, 6 (High)

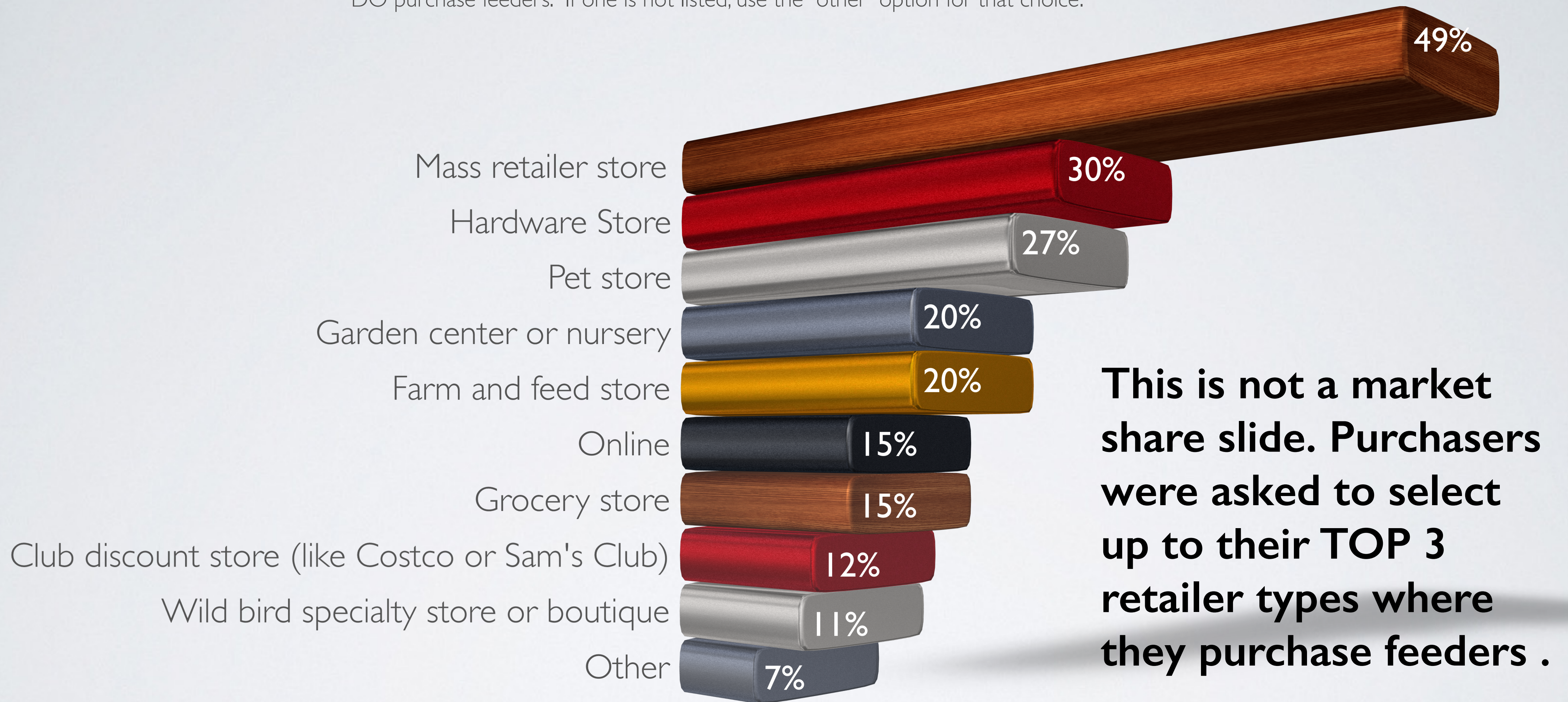
Price is the primary driver when purchasing wild bird feed, followed by attracting a **wide variety** of birds. Over half of purchasers also consider packaging to be an important factor.

4

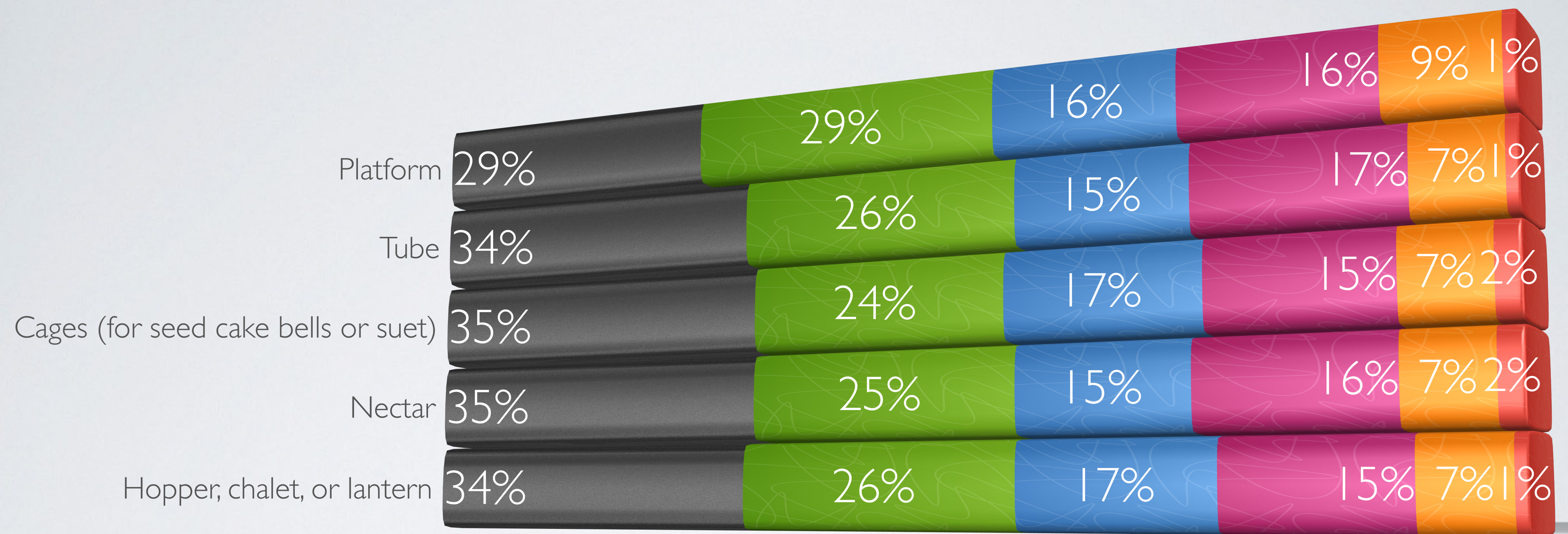
BIRD **FEEDERS** SHOPPING HABITS & PREFERENCES

WHERE DO CONSUMERS CHOOSE TO BUY FEEDERS ?

Where would you say you purchase wild bird FEEDERS? (Please select your TOP (3) THREE retailer types where you DO purchase feeders. If one is not listed, use the "other" option for that choice.



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

Bird feed purchasers own a variety of feeder types and while platform is the most popular type, there is little differentiation among the others.

5

GENERAL BIRD FEEDING HABITS & ACTIVITIES

WHY DO THEY PARTICIPATE IN FEEDING?

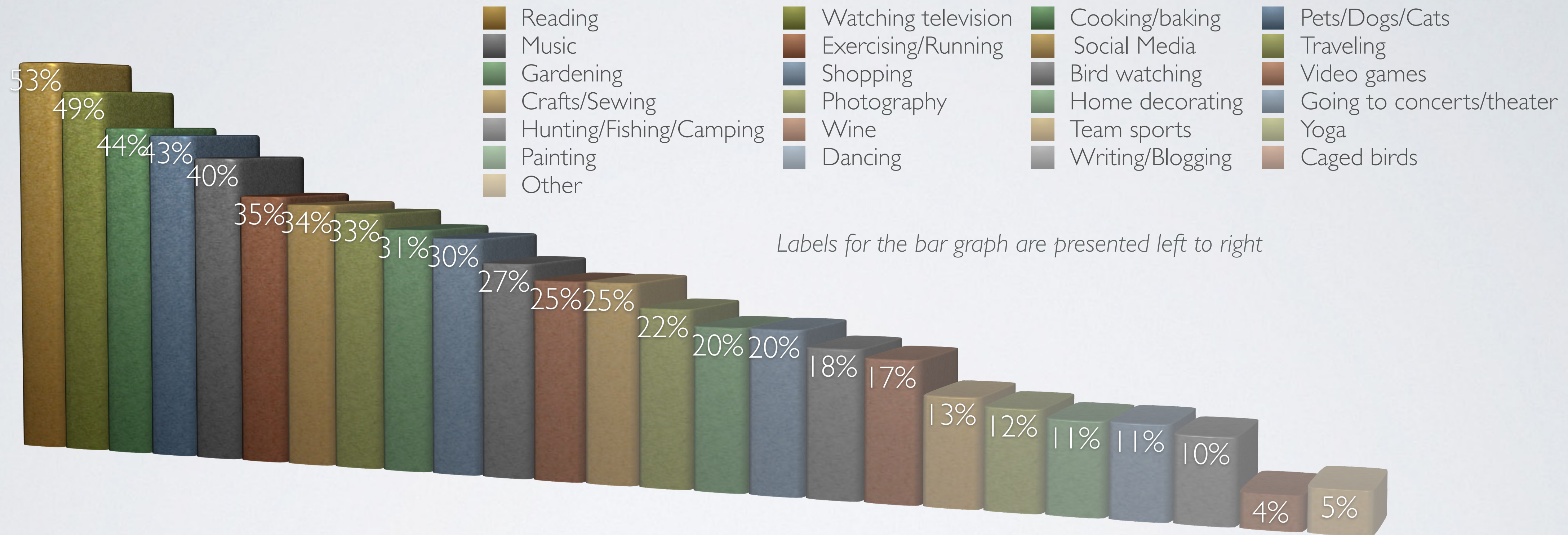
Why did you first start to feed birds?



The most popular reasons for starting are that one grew up in a family that fed birds, followed by having watched a friend or neighbor feed birds.

HOBBIES IN ADDITION TO BIRD FEEDING

Do you have any hobbies from the following list?



There are differences between feeders and non-feeders in terms of current hobbies. **Feeders** are more likely to enjoy pets, gardening, bird watching, and camping, while **non-feeders** seem to have fewer hobbies overall.

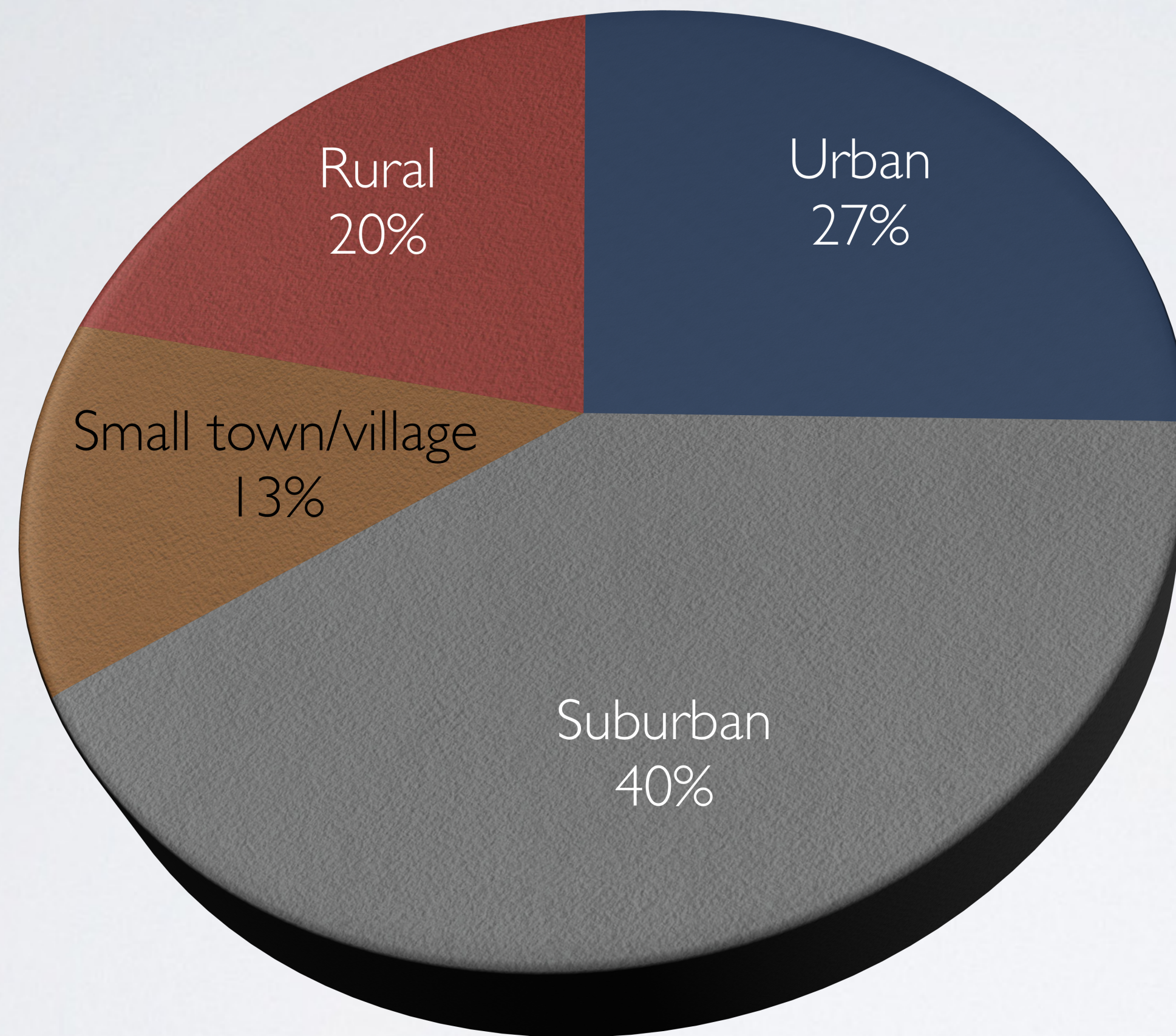
PURPOSES FOR HOBBIES

In your opinion, an engaging and enjoyable hobby should provide which of the following?



Bird **feeders** are more likely to look to a hobby to bring harmony and beauty to their life, whereas **non-feeders** are more likely to look for something new and unique they can do independently.

WHERE DO THEY LIVE?



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

Feeders are more likely to live in rural areas (26% vs 15%).

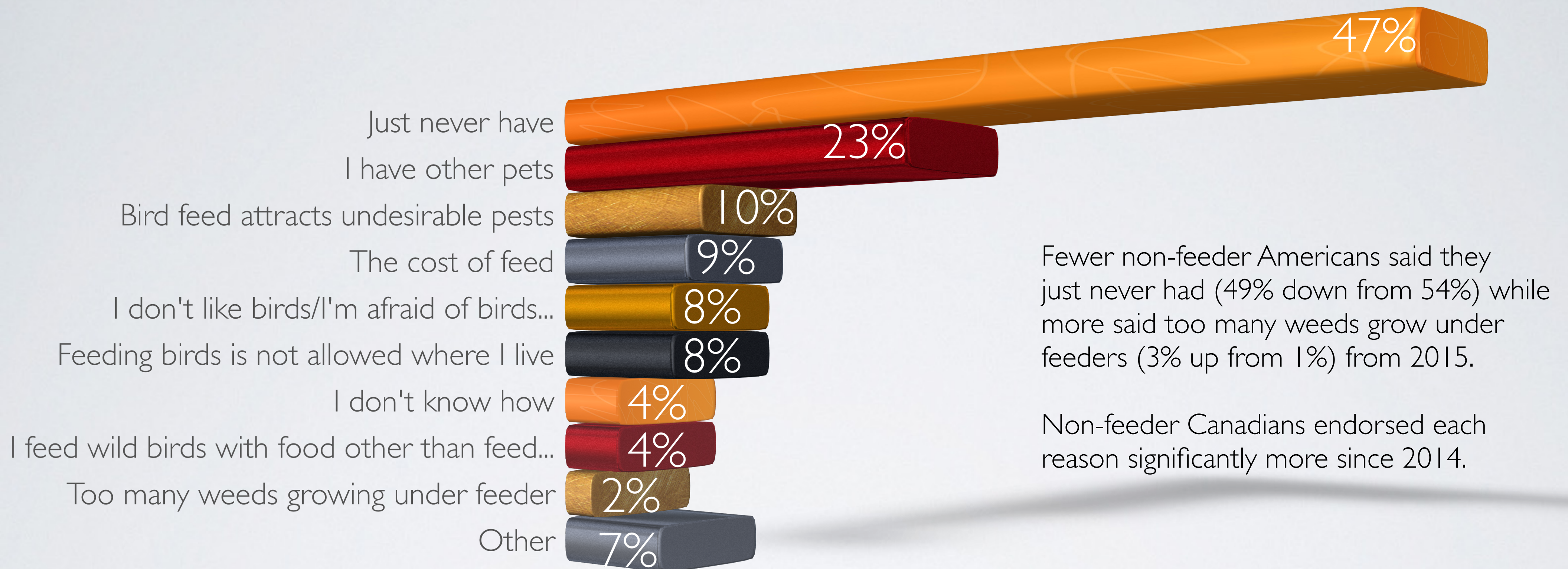


6

BRIGHT FUTURE

FOR WILD BIRD FEEDING

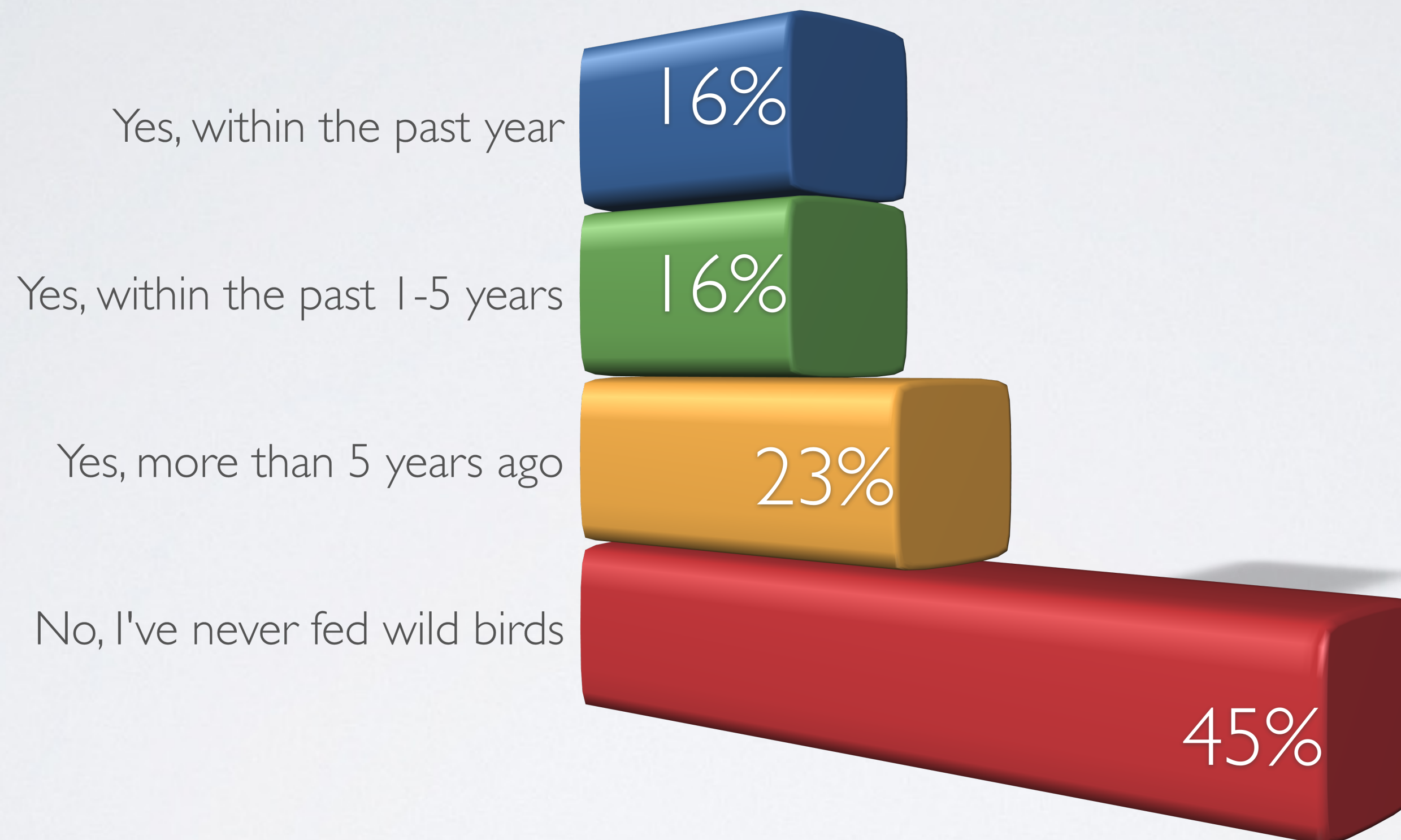
WHY NOT?



Among those who **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.

EXPERIENCE

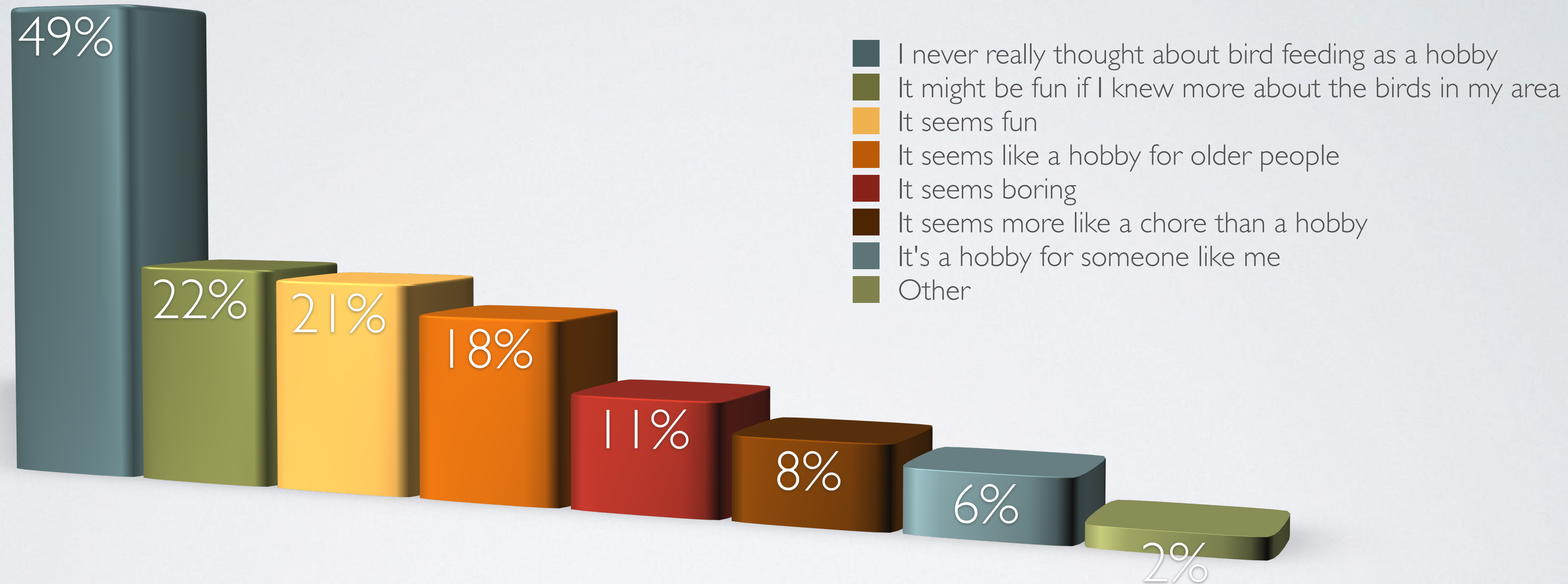
Regardless of whether you've bought wild bird feed, have you ever FED wild bird(s)? If yes, when was the last time?



A little over half of non-purchasers say they have **at least** tried feeding birds before.

IS BIRD FEEDING A HOBBY?

What are your perceptions of bird feeding as a hobby? Select all that apply.



About half of non-feeders have never really thought about bird feeding as a hobby. Among those who **have** thought about it, the top perceptions are that it might be fun if they knew more about birds and that it seems fun.

CONVERTING

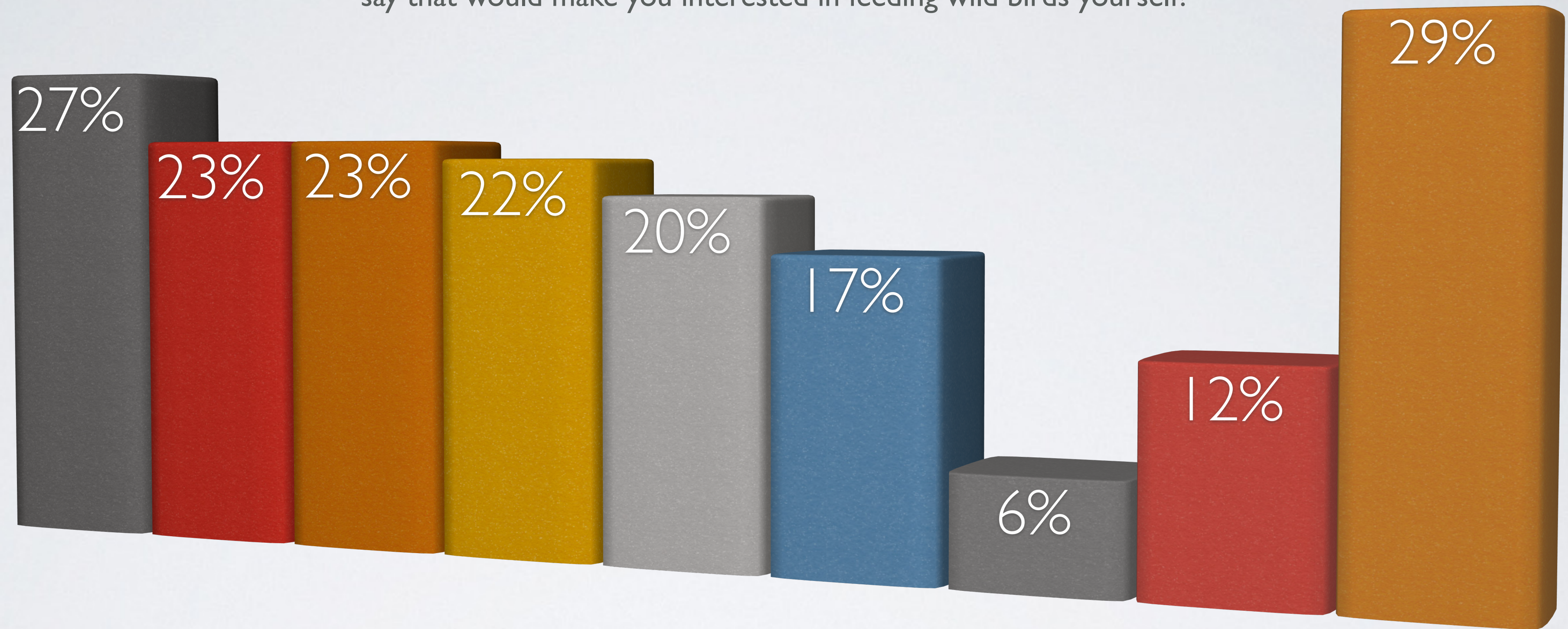


Which of the statements below best describes you?

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

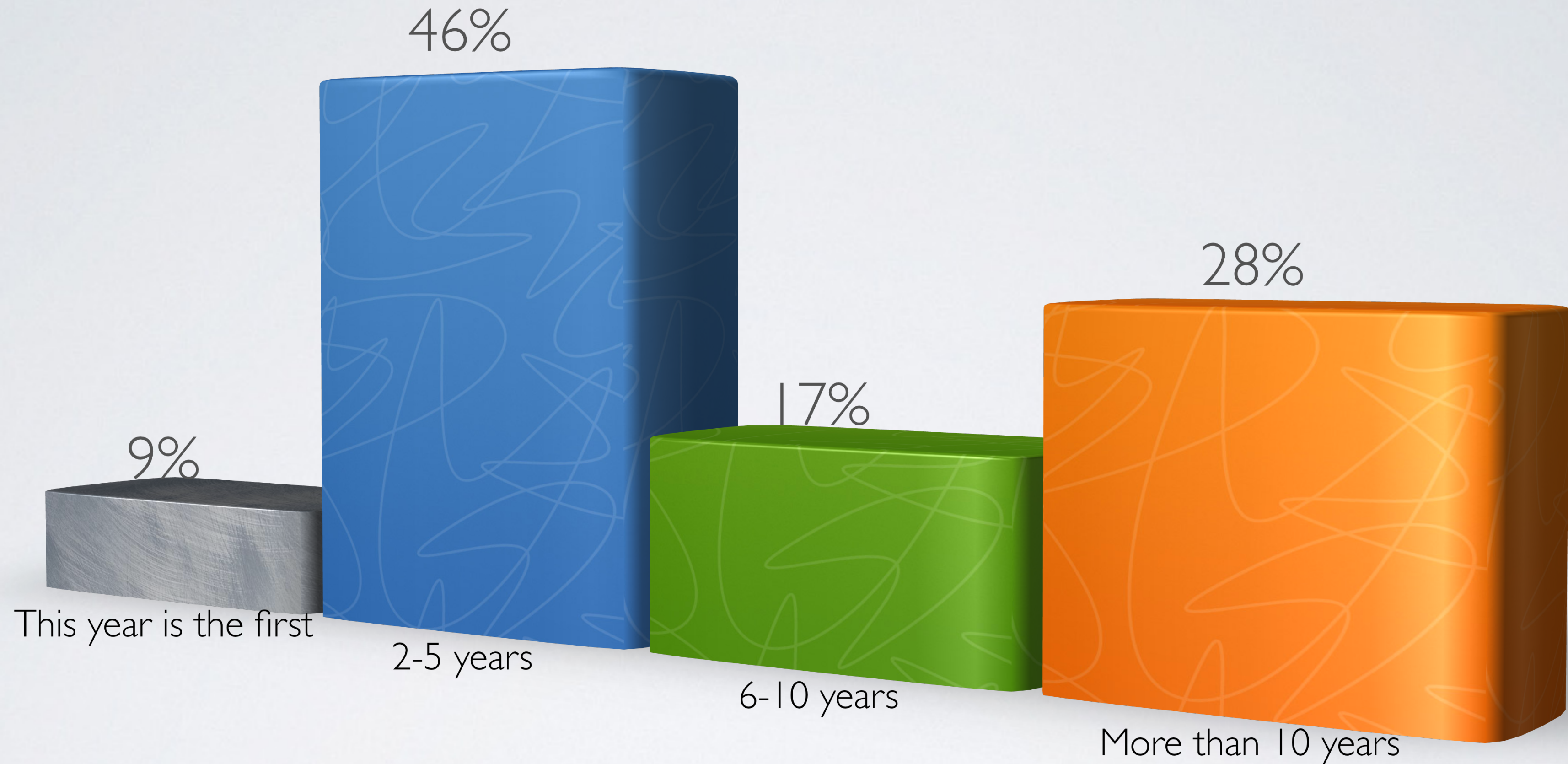
REASONS TO FEED

Imagine a friend were telling you about feeding wild birds. What could he or she say that would make you interested in feeding wild birds yourself?



- Birds eat much more than just bird seed, and feeding birds in your backyard also invites them to feast on the insects, worms, snails and spiders...
- Feeding helps wild birds by replacing food sources that are destroyed when homes are built and landscaped...
- Feeding birds can be an educational activity for all ages. Observing the birds that come to your yard will help you learn about behaviors, identifications...
- As you become more familiar with your backyard birds, it is possible to begin recognizing individual birds by their unique markings or personalities...
- Wild birds assist with flower pollination. This can result in more luxuriant, full flowerbeds in your yard...
- Photographers with an interest in nature subjects can enjoy scenes right outside their windows when they feed the birds. Painters and other artists can also...
- Many small birds eat large amounts of seeds, especially from seed bearing flowers or weeds that might be undesirable in your landscape...
- For urban dwellers, the birds they see at their feeders may be the only wild animals they have the chance to interact with...
- None of these statements would make me more interested in feeding wild birds...

WILD BIRD FEEDING IS FOR LIFE



Only 9% of feeders 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

8

NEXT STEPS

DEEPER DIVE

I. GET MORE ACCURATE ESTIMATES

1. GET MORE ACCURATE ESTIMATES

2. BETTER UNDERSTAND
CUSTOMER'S DNA

1. GET MORE ACCURATE ESTIMATES

**2. BETTER UNDERSTAND
CUSTOMER'S DNA**

3. GET MORE SPECIFIC

RECOMMENDED NEXT STEP #1:

FINE TUNE THE DATA,
GET MORE ACCURATE ESTIMATES OF THE MARKET

Setting up a **monthly tracking study for 2017** that would give us:

- Access to more accurate expenditure estimates based on shorter (monthly) periods that consumers will report on
- Better understanding of market fluctuations throughout the year
- Larger sample = higher confidence levels in the data

RECOMMENDED NEXT STEP #2:

FIND OUT WHAT MAKES PEOPLE MORE LIKELY TO SPEND MONEY ON WILD BIRD FEEDING ACTIVITIES

Conducting customer **segmentation study** that would give us:

- understanding of the consumers' psychographic dna. what matters to them, what sets them apart
- finding traits that make consumer more likely to become customer - low hanging fruit for marketing efforts.
- understanding of behavioral patterns to better position, promote and deliver the products

RECOMMENDED NEXT STEP #3:

ZERO IN ON EACH INDUSTRY SEGMENT:
FEED/FEEDERS PRODUCTION, PACKAGING, RETAIL

Conducting **a series of in-depth studies** that would give us:

- Understanding of the consumers' preferences specifically for each of the topics
- Getting ongoing business questions answered before deploying to the market.
- Getting smarter about understanding consumer insights every step of the way.

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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