PAST RESEARCH

RESEARCH METHODOLOGY AND PAST KNOWLEDGE
2013
Wave I
benchmark study
18+ y.o.
USA & CA
N = 3200
Balanced by region

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

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

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.
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KEY FINDINGS
MARKET SIZE
14.3 MM
ESTIMATED NUMBER OF HOUSEHOLDS IN 2011

7.0 MM (49.3%)
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

(Screen)

\[\boxed{\times} = 1,000,000 \text{ HOUSEHOLDS}\]
GROWTH

BIRD FEEDING HAS BEEN CONSISTENT SINCE 2013.

% WHO PURCHASE WILD BIRD FEED

- 47.9% in 2013
- 49.1% in 2014
- 42.1% (US ONLY) in 2015
- 48.3% in 2016
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
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.

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.
HOW FREQUENTLY DO THEY BUY FEED?

- Once a month or more often: 10%
- Once every 2-3 months: 13%
- Once every 4-6 months: 8%
- Once every 6-12 months: 7%
- Less than once a year: 19%
- Never: 52%

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?

Mean: $29.62

- 52% <$20
- 27% $21-40
- 21% $41+

2016
Two-thirds purchase packages of 10 lbs. or less.
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.
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.

Mass retailer store: 27%
Pet store: 26%
Grocery store: 21%
Hardware store: 20%
Farm and feed store: 15%
Club discount store: 14%
Garden center or nursery: 7%
Online: 7%
Wild bird specialty store or boutique: 7%
Other: 4%

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

- Mass retailer store: 30%
- Hardware Store: 27%
- Pet store: 20%
- Garden center or nursery: 20%
- Farm and feed store: 20%
- Online: 15%
- Grocery store: 15%
- Club discount store (like Costco or Sam's Club): 12%
- Wild bird specialty store or boutique: 11%
- Other: 7%

This is not a market share slide. Purchasers were asked to select up to their TOP 3 retailer types where they purchase feeders.
How many of the following wild bird feeders do you currently have and use?

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

& ACTIVITIES
Almost half of non-purchasers say that they might purchase wild bird feed in the future.
WHY DO THEY PARTICIPATE IN FEEDING?

Why did you first start to feed birds?

- 35% I grew up in a family that fed birds
- 28% I watched the bird feeders at a friend or neighbor’s house and wanted to try...
- 21% My partner or another family member wanted to feed birds
- 14% I received a feeder as a gift
- 13% I saw a pretty feeder I just had to have
- 13% I decided to purchase feeder when cleaning up garden for the spring
- 5% Other
- 5% Not sure

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.
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?

- Harmony and beauty in your life: 57%
- Something new and unique that you can do independently: 43%
- An opportunity to learn continuously about your hobby in order to build your knowledge base: 38%
- An opportunity to practice environmental responsibility: 23%
- A practical return on your investment in the hobby: 9%
- A structure or guidelines to help you participate in the hobby correctly: 9%
- The opportunity to support a cause financially: 7%
- The opportunity to take a leadership role and guide other people in the hobby: 6%
- A chance to compete against others: 5%
- None of these things: 9%

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.
BRIGHT FUTURE
FOR WILD BIRD FEEDING
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.
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.
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...

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?
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.
WHAT THEY ENJOY MOST ABOUT PARTICIPATING IN FEEDING AND WATCHING WILD BIRDS
NEXT STEPS
DEEPER DIVE
1. GET MORE ACCURATE ESTIMATES

2. BETTER UNDERSTAND CUSTOMER’S DNA

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

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