



# Wild Bird Feeding Institute

Feeding Habits, Practices, Attitudes, and Usage Research

SAMPLE REPORT – 2023

THERE IS MORE TO SEE...



MEMBER BENEFIT #1

## Market Research

WBFI members have access to research data with information on consumer purchases in the U.S. and Canada



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**THANK YOU TO OUR WBF RESEARCH FOUNDATION CONTRIBUTORS IN 2023 THAT MADE THIS STUDY POSSIBLE!**

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**Birding By Ear**

**Advanced Sunflower**

**Agritel Grain**

**AGWAY WILD BIRDING CENTER**

**All Seasons Wild Bird Store, Inc.**

**All Star Trading**

**American Agco**

**Armstrong Milling Co., Ltd.**

**Brome Bird Care, Inc.**

**Central Bag**

**Cereal Byproducts Company**

**Co-operative Feed Dealers, Inc.**

**Dakota AgSynergy**

**Essex Topcrop Sales Limited**

**F M Brown's Sons Inc**

**Flocking Around**

**Global Harvest Foods Ltd**

**Gold Crest Distributing**

**Good Deeds Bird Seed**

**Hawkeye Commodities**

**Heath Outdoor Products**

**IFC**

**INSPIRICO PACKAGING**

**John A. Van Den Bosch Co.**

**JRK Seed**

**Kalshea Commodities Inc.**

**Lebanon Seaboard**

**Mountain States Oilseeds**

**Nature Anywhere**

**Northern Bag and Box Company**

**Nuts for Wildlife**

**Orenda Commodity Services Ltd.**

**Ornithery**

**Pacific Bird and Supply Co., Inc.**

**Pacific Coast Commodities, Inc.**

**Panacea Products Corporation**

**Prairie Grain Partners LLC**

**Prince Corporation**

**ProvisionGard**

**R-WayAg Ltd**

**Red River Commodities**

**Red River Global Ingredients**

**Seed Factory Northwest**

**Standish Milling**

**Sun Coast Packaging**

**Sweet Seed**

**Turtle Mountain Seed Company Ltd.**

**Unipet, LLC**

**Volkman Pet Products**

**Watkins Grain LLC**

**Wild Bird Habitat Stores, INC**

**Wild Birds Unlimited, Inc.**

**Woodstream**



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### TARGET AUDIENCE

N|1,600 (N|800 per market: US and Canada)

Consumers who are the sole decision maker or shared decision maker of household wild bird food purchases and have actively fed wild birds within the past twenty-four months.

Fielded June 2023.

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### OBJECTIVES

The WBFi is interested in refreshing industry understanding of the state of the wild bird feeding market. WBFi seeks to conduct new research in order to assess attitudes and behaviors specific to wild bird feeding and the incidence of wild bird hobbies. Specific areas of learning include – industry dollar spend, regional nuances, consumer profiles, purchase motivations and considerations, barriers, and retailer specifics.

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### REPORTING

Results within are reported at a total and per market level. Significant differences from the 2016 study and among subgroups – gender, age, and bird watching enthusiasm – are noted at a 95% confidence interval.

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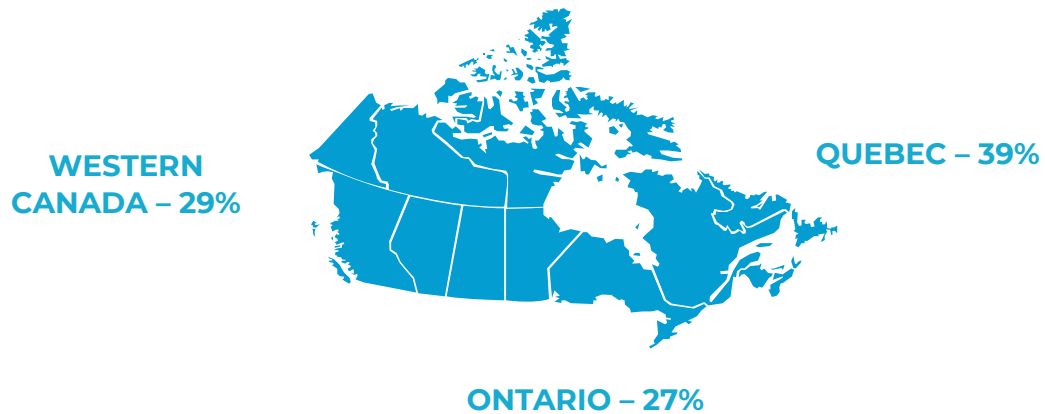


# KEY FINDINGS – MARKET SIZE AND REGIONAL NUANCES

## CANADA



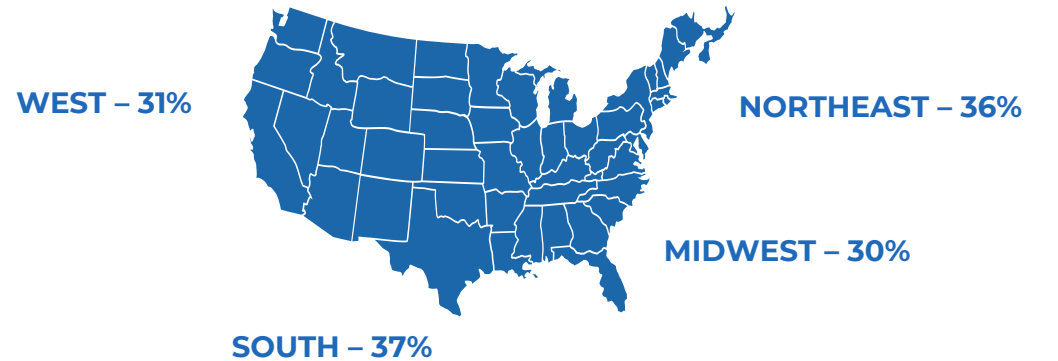
PERCENTAGE OF HOUSEHOLDS PER REGION PURCHAISING WILD BIRD FOOD MONTHLY:



## UNITED STATES



PERCENTAGE OF HOUSEHOLDS PER REGION PURCHAISING WILD BIRD FOOD MONTHLY:



## KEY FINDINGS – PURCHASING MOTIVATIONS, BARRIERS, AND RETAILER SPECIFICS

### MASS RETAILERS ARE MOST COMMONLY SHOPPED FOR BIRD FOOD AND FEEDERS, BUT A SHIFT ONLINE IS OBSERVED

When purchasing wild bird food and feeders, consumers are most often turning to mass retailers, primarily Walmart. However, compared to 2016, a decrease in many brick-and-mortar store types is observed. Instead, growth in online retailers, primarily Amazon, is reported. This trend is already observed among consumers shopping for bird feeders in Canada, as just as many purchase from the online site as they do mass retailers. When shopping for these items, consumers prioritize price in their selection of a retailer.

### CONSUMERS ARE LOYAL TO BRANDS WHEN CONSIDERING THEIR WILD BIRD FOOD PURCHASES

Two thirds of consumers always buy the same brand or the same couple of brands when purchasing wild bird food. This habit is amplified among avid bird watchers. However, brand affinity is lost when a preferred brand is not available at the store most commonly shopped. The majority of consumers would purchase a different brand of food as opposed to seeking out their preferred brand, with the exception again of avid bird watchers. Avid bird watchers are significantly more likely to go out of their way, to a different store, to purchase their brand of choice.

### PRICE AND THE CAPABILITY OF THE FOOD TO ATTRACT BIRDS ARE IMPORTANT TO CONSUMERS

At least seven in ten consumers feel a bird food's price and ability to attract a wide variety of birds are important when purchasing wild bird food. Both these criteria have increased significantly in importance from 2016.

### CONSUMERS ARE INFLUENCED TO PARTAKE IN BIRD FEEDING/WATCHING BY OTHERS

When asked what initiated their bird feeding, consumers top reasons include the influence of someone else. Those being “I grew up in a family that fed birds”, “I watched bird feeders at a friend/neighbor's house and wanted to try”, and “My partner/family member wanted to feed birds”. The involvement of others in the hobby is cited as an influencing factor, but also as a source of enjoyment for the hobby.

### FOR THOSE NOT PARTICIPATING IN THE HOBBY, EDUCATION OR AN INTRODUCTION COULD SWAY THEIR DECISION

When asked why they have not purchased wild bird food, four in ten consumers state “I just never have”. To add to the unfamiliarity with the hobby, consumers most common perception of feeding wild birds is that they have never considered it. To convert these consumers, consider sharing educational tips about the hobby. Roughly one-fourth state they would be interested based on the hobby's ability to connect those participating to nature, the educational opportunity it provides for all ages, and its service as an organic pest control.



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# Detailed Findings – North America Snapshot

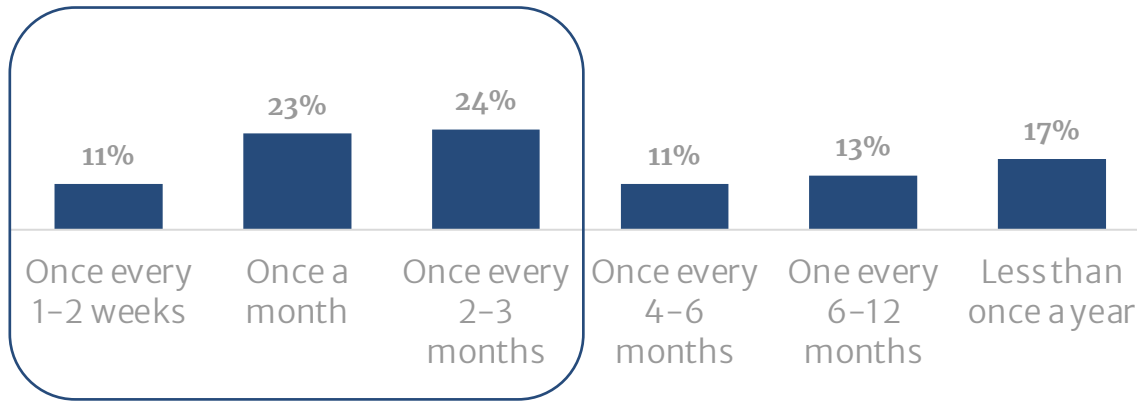
The majority of consumers are purchasing wild bird food at least once every three months. An increase in size of packages purchased is observed from 2016. One-third anticipate spending more this year, particularly among avid bird watchers and younger consumers.

## Wild Bird Food Purchasing Behaviors

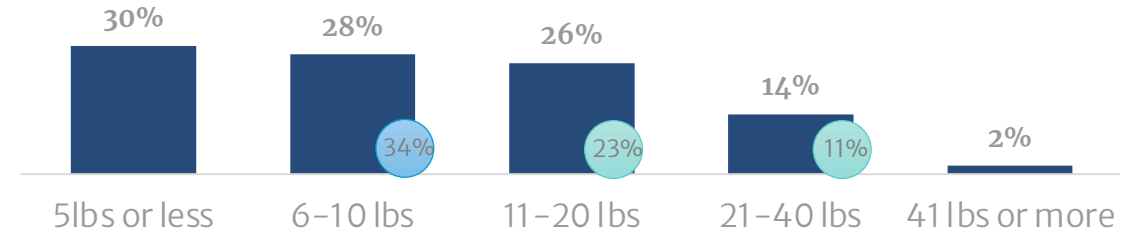
Total North America (Canada + United States)



Frequency of Purchasing Wild Bird Food



Size of Bird Food Package Purchased



33% of consumers plan to spend more than last year

Avid bird watchers and consumers ages 18-34 are more likely to spend more in the coming year.

↑ ↓ Significant increase/decrease from 2016 WBF Annual Study at 95% CI.

Base: Respondent Base (n = 1,600)

PQ4 – How often, if at all, do you or your household purchase wild bird FOOD?

Q9 – When you purchase wild bird FOOD, which of the following best describes the size of the package you purchase?

Q2 – Compared to last year, how much do you think you will spend on wild bird FOOD?



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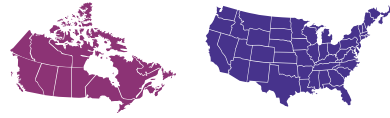
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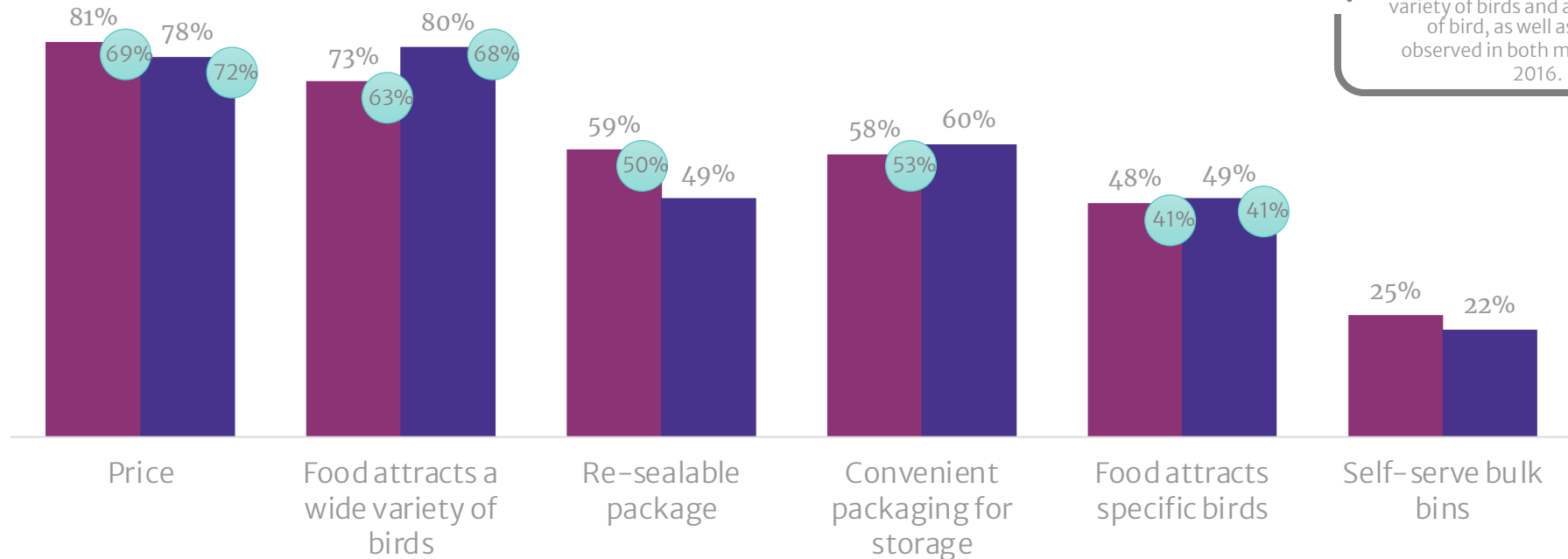
## Detailed Findings – Per Country Retailer Specifics

Price and the ability of the bird food to attract a wide variety of birds are of high importance. The importance placed on these factors, and others, have increased since 2016.

## Wild Bird Food Purchasing Behaviors Per Country



Importance of Bird Food Factors when Purchasing  
% Four + Five Star Rating of Importance



An increase in the importance of bird food to attract both a wide variety of birds and a specific type of bird, as well as price, is observed in both markets from 2016.

↑ ↓ Significant increase/decrease from 2016 WBF Annual Study at 95% CI.

Base: Canada Respondent Base (n = 800), US Respondent Base (n=800)  
Q10 – When choosing a particular wild bird FOOD, how important are the following factors?





## Detailed Findings – Per Country Perceptions of the Hobby

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The connection to nature, relaxation, entertainment, and do-good feeling are all enjoyed when consumers bird watch.

## Bird Watching Enjoyment



“It is magical to watch bird from a rather close distance they eat few feet from my door. So, I can watch through the window. It is so **relaxing** watching them, it brings **so much joy to my heart.**”

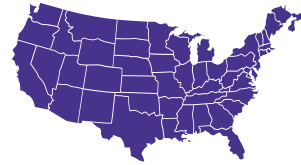
“I love watching them keep an eye on the feeder and flock to the feeder as soon as I fill it up. The birds really seem to appreciate good feed in the winter, and it **feels good to feed them.**”

“I love watching the birds fly over to eat after filling their feeders. Their **chirping makes my heart so happy** ❤️ They come for drinks of water, nice to see them so contented.”

“They're **beautiful, and it's delightful to see them.** When the weather is cold and snowy, it's rewarding to know I'm helping the birds that stay here during the winter.”

“I like seeing different kinds of birds in my yard, especially ones that do not come around very often. They are **enjoyable to watch and can be entertaining.**”

“I enjoy seeing all the different types of birds and learning more about them. I love the bird song; it is mostly **peaceful and relaxing.**”



“We enjoy the **simple and pure beauty** of sitting on our back porch swing, watching the birds and squirrels come to eat. It is sooo relaxing. Sometimes a raccoon appears from the back property and jumps up on the feeding table when it is unoccupied. The birds call out to each other. The squirrels run around and play. It is a wonderful **relaxing experience** that we enjoy very much.”

“The way my kids get excited about seeing and identifying different birds. We get cardinals, blue jays, Carolina chickadees, and robins in our yard. I **like being able to provide for them**, and to be able to **see a bit of nature out my window** while enjoying coffee or breakfast.”

“I **love seeing all the wildlife** that thrives in my backyard. I try to make it a friendly place for wild animals. My cat loves to watch the birds at the feeders. The bird feeders are about 3 feet from my chair, so it is like being in a Disney movie.”

“I **love seeing** the variety of birds that come to feed, seeing how they interact with each other, and listening to their songs. Hummingbirds are my favorite, though, and I always try to become a **trusted friend with them.**”





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# Bird Watching Personas

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# Appendix – Participant Traits

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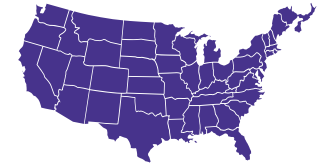
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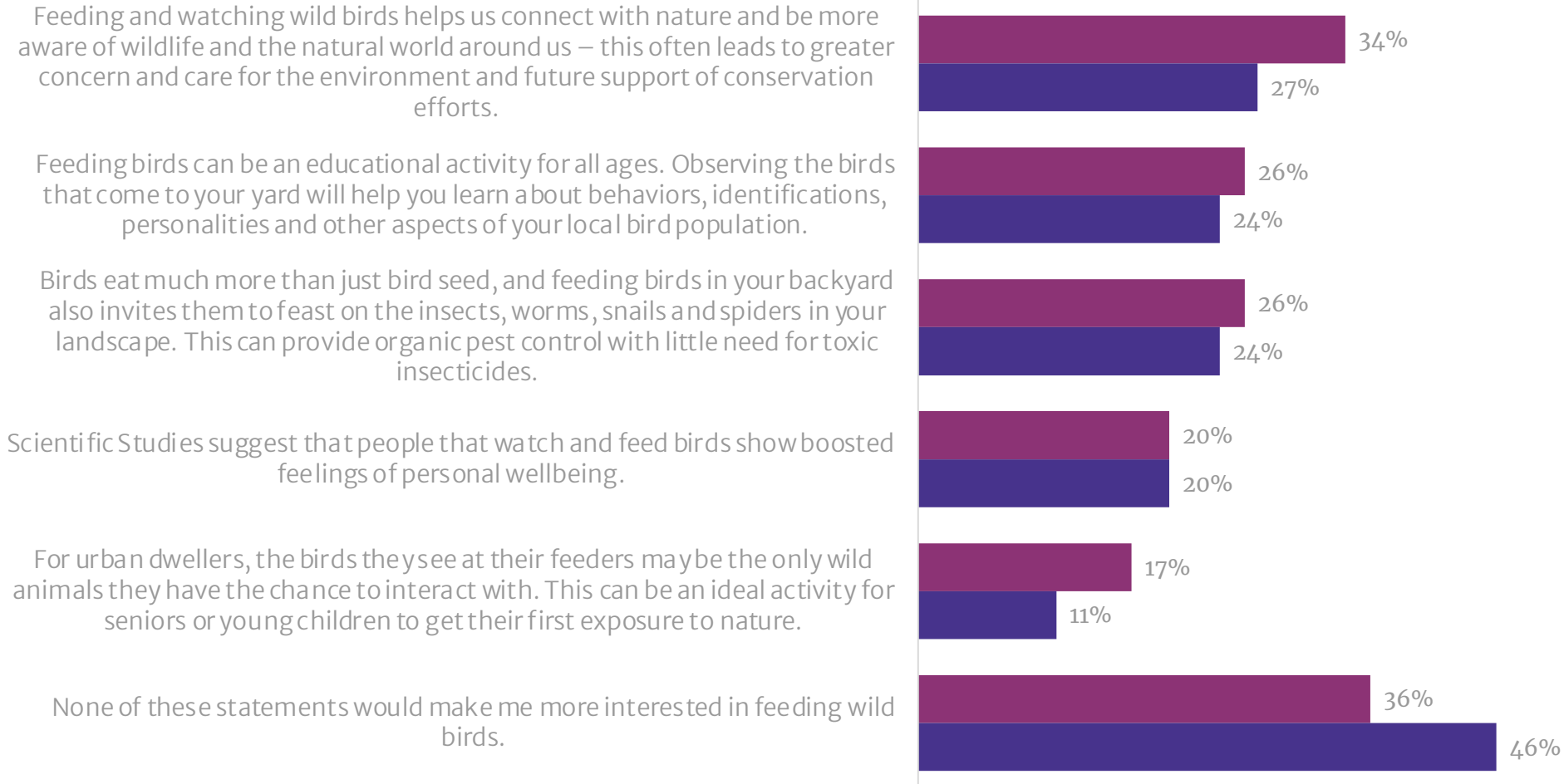
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# Appendix – Non-Bird Feeding Individuals



### Motivators of Interest in Wild Bird Feeding



Base: Canada Respondent Base (n = 1,467), US Respondent Base (n=2,024)  
 PQ7 – Imagine a friend telling you about feeding wild birds. What could they say that would make you interested in feeding wild birds yourself?



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