



Wild Bird Feeding Industry BIG Survey Results

Thursday, November 8, 2018

BIG Survey

- ➔ Recently, the WBFJ Research Foundation completed a study that provides insight into the mindset of those who feed wild birds.
- ➔ Equally as important, it provides valuable information about those consumers who have the potential to become wild bird food customers but for one reason or another are not currently taking part in the hobby in a meaningful way.



BIG Survey

- ➔ Some might be prospects, others might be lapsed customers and still others might simply be low usage customers.
- ➔ No matter how you label them, the WBFI study found that they share some common characteristics.



The “BIG” Question

- ➔ How do you grow your business and how do we grow the wild bird category overall?



The “BIG” Little Questions


- ▶ Why has the wild bird category been soft recently?
- ▶ Are there generational variables to overcome relative to interest in wild bird feeding?



The “BIG” Little Questions

- ➔ How do people progress in the hobby throughout their life and changing lifestyles?
- ➔ What motivates consumers in different target groups to participate and buy our products and services?





Why do they keep looking at their phones instead of us?

Cat videos.

Always with the cats.

Applying the Survey Findings

- ▶ Who are your current best customers?
- ▶ How can we motivate them to buy more?
- ▶ Who are your best prospects for the future?
- ▶ How can we interest them in participating?



Background / Objectives


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



Background / Objectives

- ➔ Determine the extent to which alternative messaging strategies motivate our target group to:
 - ➔ Begin their involvement in wild bird feeding
 - ➔ Increase their involvement in wild bird feeding



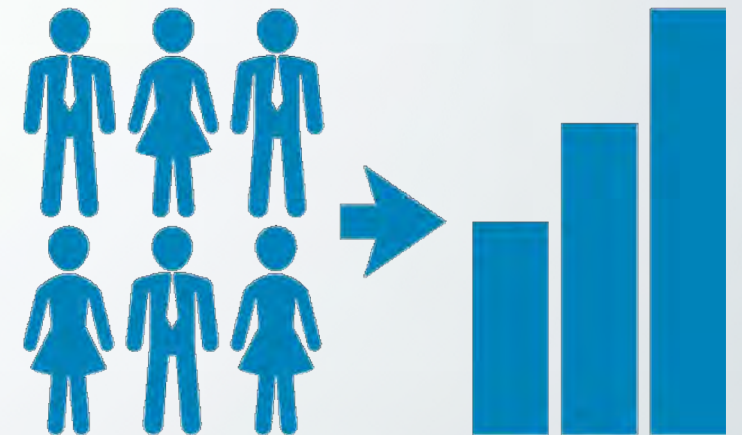


What do you know about crunching data?

I know it wouldn't be as noisy if you just chewed with your mouth closed.

Methodology

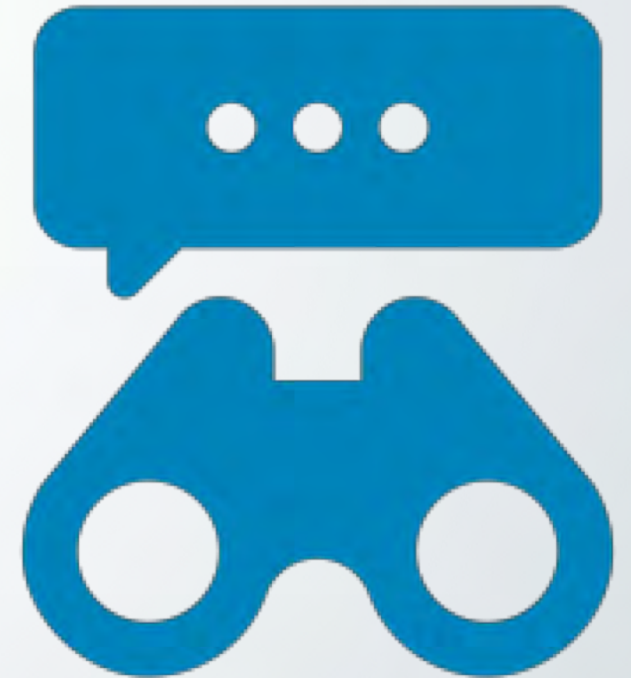
- 387 Women and 363 men
- 21 to 70 years of age
- Four segments:
 - Prospects
 - Lapsed Customers
 - Low / Moderate Customers
 - Highly Involved Customers



Customer Segments

➤ Prospects

- Never participated in wild bird feeding but have neutral or positive intent to participate in the future.



Customer Segments

➤ 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 high levels of enthusiasm and commitment to wild bird feeding.



Customer Segments

➔ 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.



Customer Segments

➔ 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.





1 in **3**



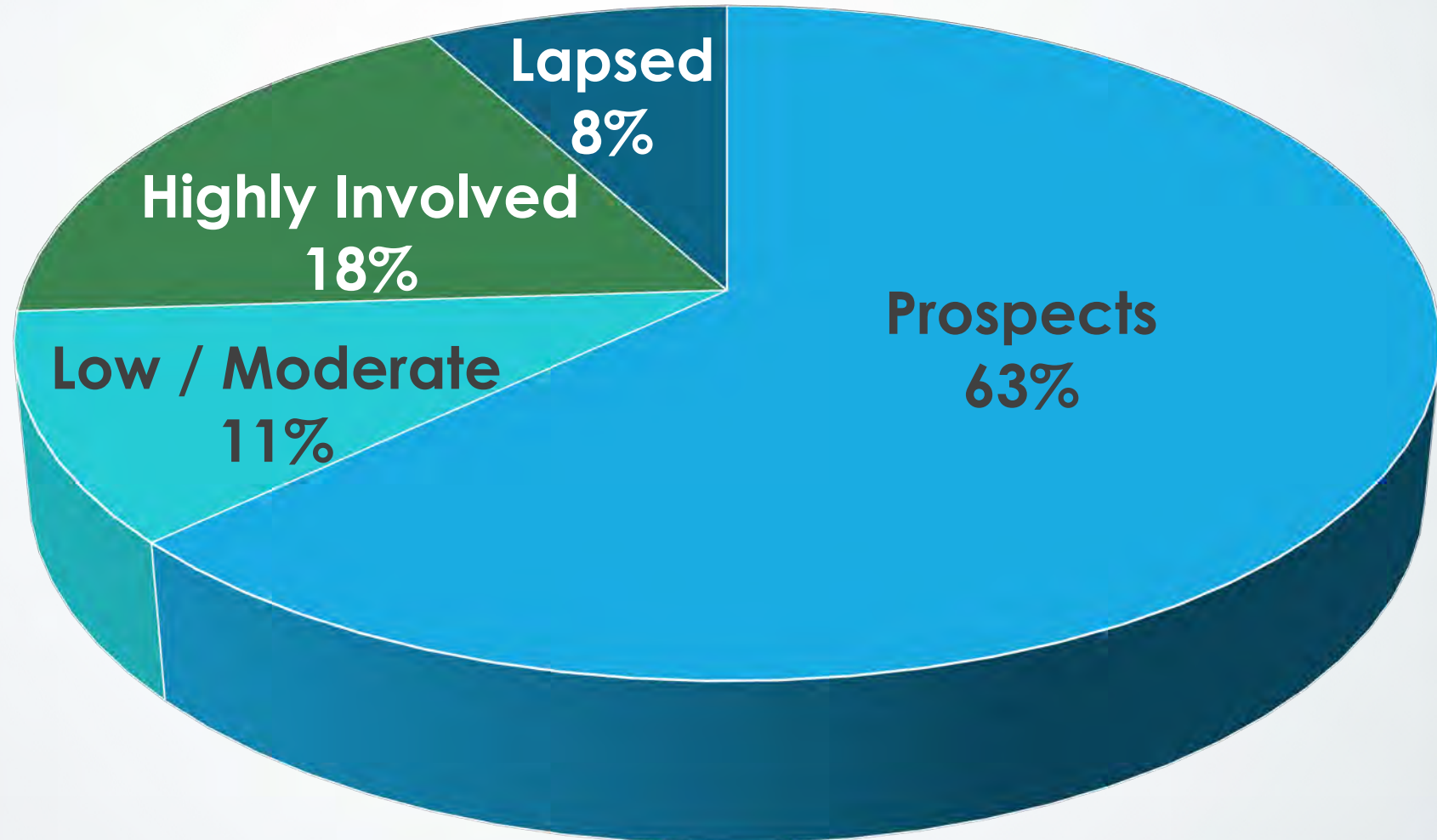
Are Viable Targets For
Feeding Wild Bird



114.6 Million

35% of the U.S. population falls into one of the four bird feeding categories!

Consumer Breakdown





Results: Breakdown

- ▶ Education Is Key
- ▶ Start Outdoors
- ▶ Stay Positive
- ▶ Price Isn't As Important As You Think
- ▶ Feeder Facts
- ▶ Barriers
- ▶ Motivations



What was your major in college?

I wanted to be a dentist, but all my friends were in aviation.

Education Is Key

- ▶ Unlike those already feeding wild birds, 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 specialty retailers.



Education Is Key

- ➔ **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.
- ➔ We need to determine how to most effectively educate these **prospects**.



Education Is Key

- ▶ **Current customers** claimed personal relationships were their primary source of information when they first engaged in wild bird feeding.
 - ▶ Beyond family and friends, **customers** deem online and retail experts, as well as on-pack messages, as the best sources of information.
 - ▶ A notable number of current customers did not initially research the activity at all.



Education Is Key

- ▶ 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** initiate and continue their quest to learn about wild bird feeding.



Education Is Key

- ▶ When first looking to educate themselves, **customers** query a broad spectrum of issues, with no one particular subject standing out.
- ▶ **Customers** felt the information sought was moderately easy to find.
- ▶ **Highly Involved Customers** utilized a far broader array of resources than their counterparts.
 - ▶ Once engaged, ongoing education falls off significantly except among **Highly Involved Customers**.



Education Is Key: Implications

- 🔄 Make it easier for prospects and users to learn more about wild bird feeding, wild bird food and wild bird feeders.
- 🔄 Company websites should be viewed as a key resource to provide consumers with information beyond just products.
- 🔄 We need to promote the values and rewards of wild bird feeding through commentary and personal interest stories.



Education Is Key: Implications

- ↻ Consideration should be given to engaging online bloggers as ambassadors, reaching out to **prospects** to generate awareness and curiosity.
- ↻ **Prospects** indicate a tendency for visiting specialty retailers when they shop feeders and feed, likely as a means to efficiently fill their knowledge gap with expert advice.
 - ↻ Sales personnel and/or online retailer engagement have a strong influence on their purchase decisions.



Education Is Key: Implications


- ⌚ Time constraints were noted by both **lapsed customers and prospects.**
- ⌚ It may be beneficial to communicate the minimal weekly time investment typically required to bring hours of beauty and entertainment to ones yard.



Education Is Key: Implications

- 🕒 **Highly involved customers** are fully engaged and open to learning more.
- 🕒 Their thirst for knowledge is not the overriding factor.
- 🕒 Rather, it is a means through which they can heighten the pleasure they experience when they successfully attract wild birds and observe the beauty and wonder of nature.





Do you prefer being outdoors or indoors?

I've tried to get indoors, but there's a bird who flies right at me when I do. That is one good looking chickadee.

Tell me about it.



Start Outdoors

- ▶ **Customers and prospects** alike are moved by the beauty and connection to nature that wild bird feeding provides.
- ▶ **Customers** were also spurred by the entertainment value of wild bird watching.
- ▶ **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.



Start Outdoors: Implications

- 🔄 When generating awareness about wild bird feeding among **prospects**, our focus should be beauty, connecting with nature - not just for birds, but for the environment as well.
- 🔄 **Prospects** had concerns about whether wild bird feeding is healthy. They should be addressed head-on to alleviate this hurdle.
- 🔄 With no category knowledge and limited, if any, points of reference (but a willingness to learn), it is imperative the basics be readily accessible and concisely communicated online, in-store and on-pack.



Start Outdoors: Implications

- 🕒 **Low/moderate customers** are not dissimilar from **highly involved customers** and do not have any major barriers to deeper involvement.
- 🕒 It seems that 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 by messages focusing on beauty and connection with nature.






Start Outdoors: Implications

- ↻ Consideration should be given to:
 - Seasonal tie-ins with gardening.
 - Promoting the enhanced beauty wild birds bring in-season.
 - Continued beauty they deliver when gardens lie dormant.
- ↻ Gardening Centers grow in importance as **customers'** feeder collections and/or feed needs expand, likely due in part to a tandem gardening hobby.





**How do you
maintain such a
positive attitude?**

**Ideas are like bird food,
Murray. Enjoy the good
stuff and leave everything
else behind.**

Stay Positive

- ▶ The majority of **prospects** admit they had never thought about participating in wild bird feeding prior to the survey.
- ▶ They are devoid of knowledge regarding the activity, believing that they have to invest time to learn.
 - ▶ Specifically, how to attract the wild birds they would like to see.
 - ▶ Some seem unsure where to turn for the information.



Stay Positive

- ➔ Some **prospects** question whether feeding is good for wild birds. They also don't want to attract unwanted wildlife or clean up the mess created by feeders.
- ➔ There is notable concern about the time investment required, as well as storage space needed for feed.



Stay Positive

- ➔ Despite the beauty, connection with nature and entertainment value derived from wild bird feeding, **lapsed customers** abandoned the activity. (although not without giving it a fair trial - 3 years+).
- ➔ With other demands on their time, the benefits did not outweigh the constant task of filling empty feeders.



Stay Positive

- ▶ **Low/moderate customers** don't express negativity toward any one aspect of wild bird feeding.
 - ▶ Like **highly involved customers**, they feel guilty if their feeders run out.
- ▶ 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.






Stay Positive: Implications

- 🔄 **Prospects** distinguish themselves as notably motivated by the positive contribution they can make on the environment through wild bird feeding.
- 🔄 As may be expected, **highly involved customers** most strongly embrace all the benefits/ rewards of wild bird feeding.





**Those humans
think feeding wild
birds is a bargain.**

**I know why. I've
seen their cable bill.**

Price Isn't As Important As You Think

- ▶ When shopping for a first feeder and feed, **prospects** tend to focus their purchases at specialty retailers.
- ▶ **Lapsed and low/moderate customers** opted for home improvement and/or mass merchandise stores.
- ▶ **Highly involved customers** frequented a broad spectrum of sources.



Price Isn't As Important As You Think

- ▶ Although price is a key feed selection criterion for all segments when making an initial purchase:
 - ▶ **Prospects** would also strongly consider recommendations.
 - ▶ **Highly involved customers** give it less weight than do others, considering the feed's ability to attract a variety of desirable birds equally important.



Price Isn't As Important As You Think


- ➔ Issues consistently voiced across **all customer segments**:
 - ➔ Desire for product solutions that reduce the frequency of feeder refills.
 - ➔ Pursue remedies to reduce the nuisance of wild life, particularly squirrels.



Price Isn't As Important As You Think: Implications

- 🔄 Developing and/or promoting complete starter kits may convert some **prospects**.
- 🔄 **NOTE:** The research team searched online for “wild bird feeding starter kits” and no search results were found in the top 10.





What's your favorite kind of feeder?

A full one.

Feeder Facts

- As may be expected, the more involved one becomes in wild bird feeding, the more feeders one owns.
- The great majority of **lapsed customers** own 1 feeder.
- **Low/moderate customers** average 2-3 feeders.
- **Highly involved customers** have 4 to 5 feeders, on average.



Feeder Facts

- ➔ All types of **consumers'** first experience into wild bird feeding is typically a seed feeder, although approximately 1 in 5 start off with a nectar feeder.
- ➔ 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.



Feeder Facts

- ➔ **Prospects** add to their list of top criteria:
 - Durability.
 - Weather resistance.
 - Ease of cleaning.
 - Ability to deter nuisance animals.



Feeder Facts

- ▶ **Customers and prospects** alike focused on the ease with which a feeder can be refilled, along with cost - 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** identified secondary consideration for the feeder's aesthetics and its ability to feed several birds at a time.



Feeder Facts: Implications

- 🔄 Key attributes on which to place emphasis during feeder product development include designs that are:
 - Easy to fill and require less filling
 - Easy to clean
 - Durable (including weather-resistant)
 - Capable of feeding multiple birds simultaneously
 - Deter unwanted wildlife
 - Options specifically created for smaller/limited spaces. These will appeal to **prospects**



Feeder Facts: Implications

- ➔ Websites are a source for information, but brick & mortar is where **customers** buy the lion's 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.



Barriers

- ❖ For **prospects**, key barriers include:
 - Approximately half simply never thought about wild bird feeding before.
 - A lack of knowledge.
 - Time necessary to feed wild birds.
 - Some question whether feeding is “good” for wild birds.
 - Concerned about the potential mess and attracting other wildlife.





Barriers

- ❖ 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.



Barriers

- ❖ Having other animals eat the feed meant **lapsed customers** were doing the undesirable refilling and cleaning chores while the benefit of feeding wild birds was simultaneously diminished.
- ❖ **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.



Motivations


- ❑ **Prospects and consumers** felt as though feeding wild birds would:
 - Positively contribute to the environment in their own yard / garden.
 - Promote pollination and seed distribution.
 - Help a disrupted natural environment and give them an escape from technology.
- ❑ A top motivation for the **three customer** segments is the entertainment of watching wild birds interact.
 - **Prospects** find it less significant.



Motivations

- ❑ **All customers** are driven by the connection with nature and its beauty that wild bird feeding delivers.
- ❑ **Highly involved and low / moderate customers** note their love for their yard / gardening and the enhancement wild birds bring.
- ❑ **Highly involved customers** are more strongly motivated by the aspects and rewards of wild bird feeding compared to the other three segments.





**This is a new feeder.
Maybe we should show
off a little.**

**As if I needed
an excuse.**

- 
- 
- ➔ **It's time to turn those who are interested in wild birds into engaged customers who actively feed wild birds.**



BIG PROJECT UPDATE

DAVE NETTEN, PRESIDENT & BIG COMMITTEE CHAIR

WE'VE DONE THE STUDY. **NOW WHAT?**

WE NEED TO TAKE ACTION(S) TO BEGIN ENGAGING AND MOTIVATING OUR NEWLY DEFINED TARGET AUDIENCES TO EITHER BEGIN OR INCREASE THEIR INVOLVEMENT IN WILD BIRD FEEDING ACTIVITIES.

NEXT STEPS

- ACTION ITEMS
- OPPORTUNITIES
- OBSTACLES
- ROADMAP



BIG PROJECT ACTION OPTIONS

1

Deliver finished marketing materials to WBFi members to use and incorporate in their own marketing campaigns – toolkits. WBFi provides the materials, the members do the marketing.

2

Develop an industry wide strategy and executable campaign that would be industry sponsored (WBFi members).



BIG PROJECT OBSTACLES

Resources

People and Their Time
MONEY

Segmentation and separation

If we aren't working together, this will not succeed
This will not be a perfect process but we need to be willing to try and adapt

***Coming together is a beginning, Keeping together is progress,
Working together is Success!***



BIG PROJECT RECOMMENDATION

Our Roadmap

Establish a plan, a budget and raise enough funds to start making an industry-wide impact. The overall goal is to increase the sales of the entire industry. A strong working group has been established to begin this process.

Once we have a more defined strategy, we may be requesting additional member pledges.