

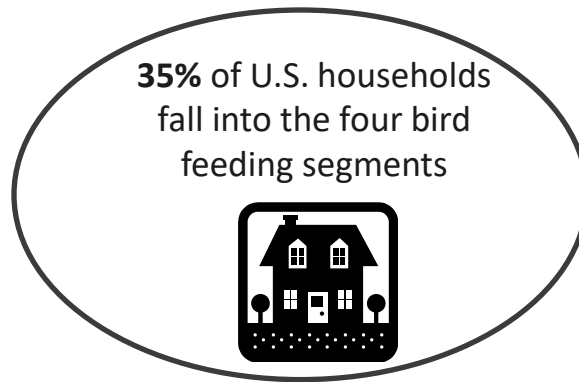
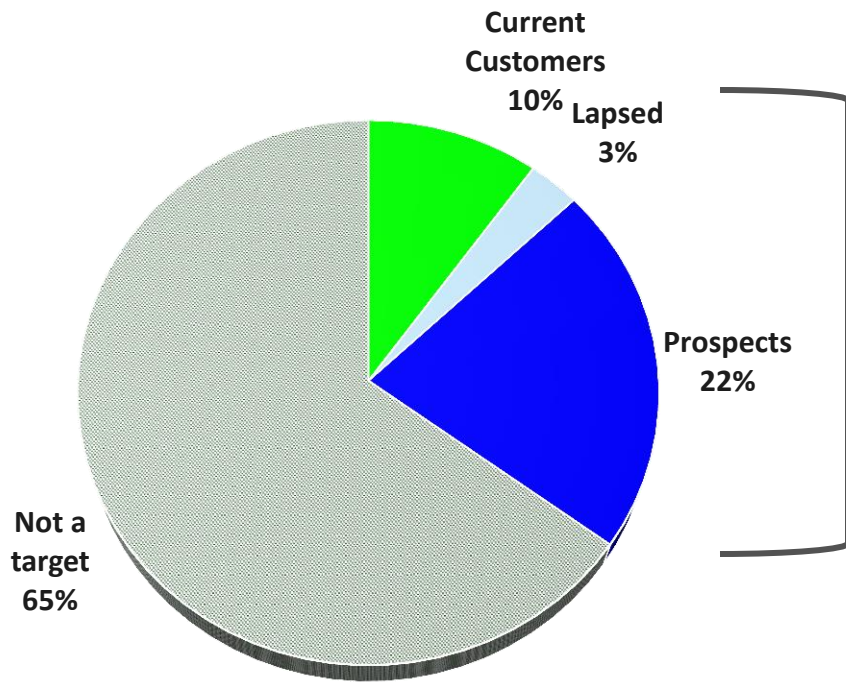


**RESEARCH
FOUNDATION**

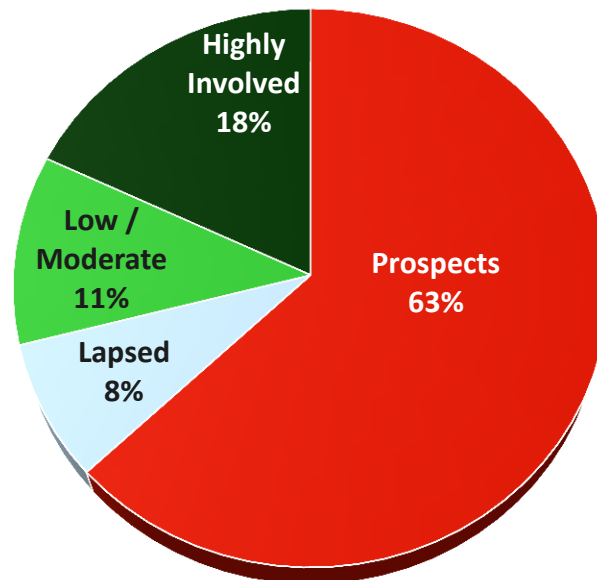
Nancy's Pick 3

April 2018





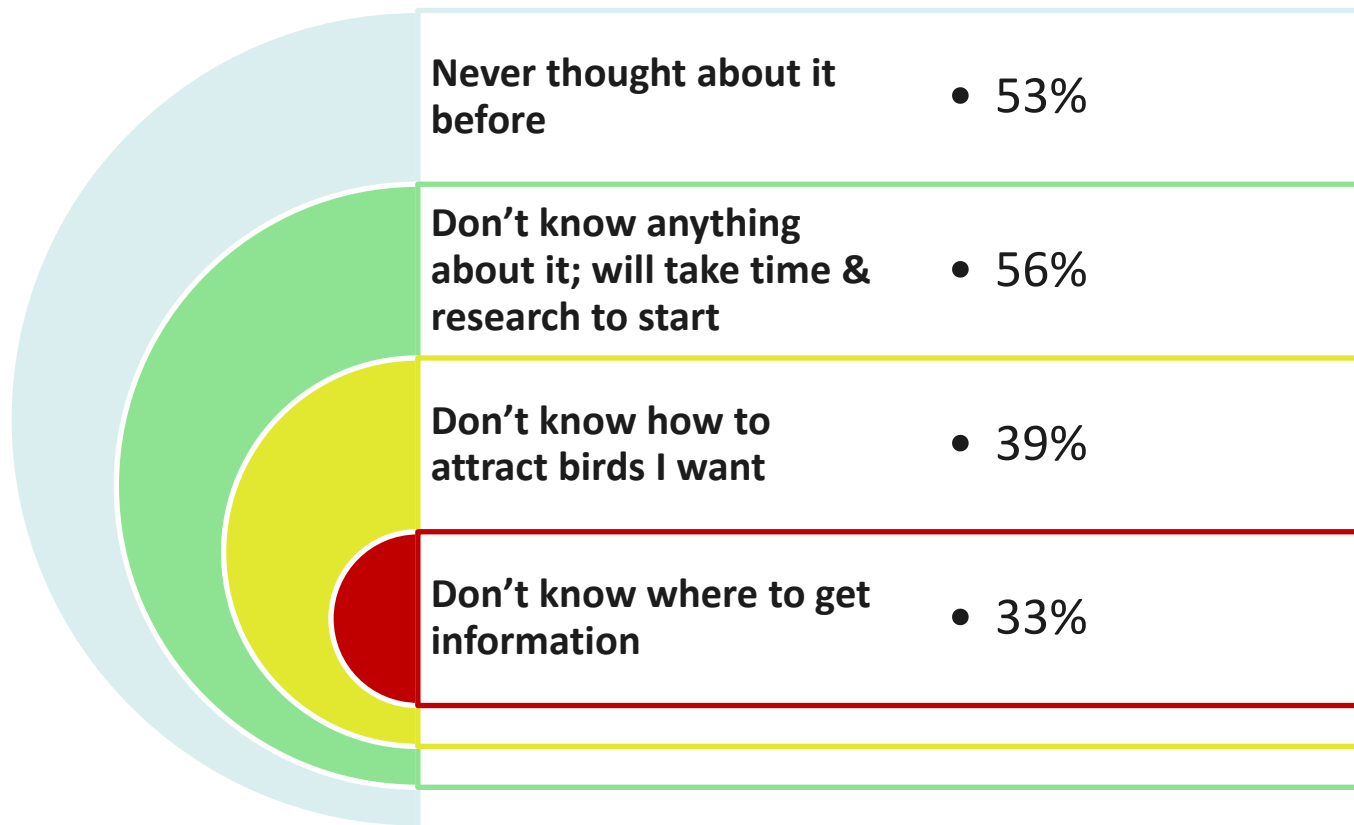
1 in 3 are viable targets





Prospects' Greatest Hurdle = Lack of awareness ... lack of knowledge

- Unsure where to turn for information



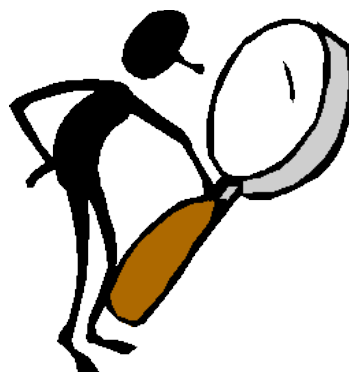
Least likely to initially learn from family/friends ... may imply not have a personal relationship who sets an example, informs and/or persuades involvement

- Thus, virtually all would research ... online, sales personnel



LEARN FROM FAMILY & FRIENDS ...

Prospects 22% Lapsed 50%
 Low/Moderate C's 41%
 Highly Involved 43%



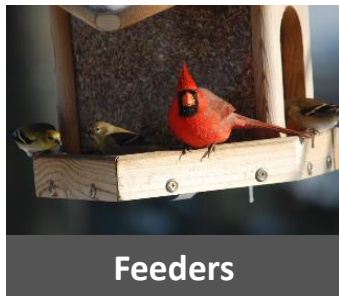
97% would research initially

<i>Research sources ...</i>	PROSPECTS	LAPSED CUSTOMERS	LOW / MODERATE CUSTOMERS	HIGHLY INVOLVED CUSTOMERS
Wild bird feeding specialty websites	68% ↑	14%	14%	31%
Websites that sell wild bird feeding products among other products	53 ↑	15	14	31
In-store sales personnel at stores that sell wild bird feeding products among other products	30 ↑	12	11	17
Online community chat rooms/blogs	24 ↑	3	4	16

Prospects would strongly rely on the Specialty channel with shopping for their first feeder and feed
- Likely a means to efficiently fill their knowledge gap with expert advice

Would Shop Specialty

63%



65%



Pet stores that sell wild bird feeding products among other products **39%**

Pet stores that sell wild bird feeding products among other products **33%**

Wild bird feeding specialty websites **28%**

Wild bird feeding specialty websites **23%**

Websites that sell wild bird feeding products among other products **20%**

Websites that sell wild bird feeding products among other products **26%**

Independent retailers that sell only wild bird feeding products **16%**

Independent retailers that sell only wild bird feeding products **13%**



Customers and Prospects alike are moved by the beauty and connection with nature wild bird feeding provides

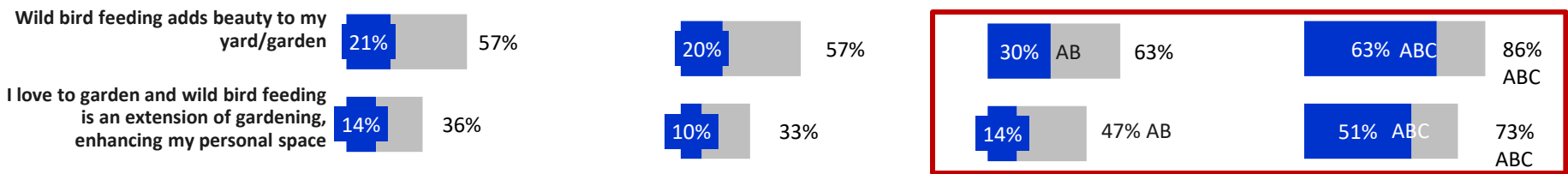
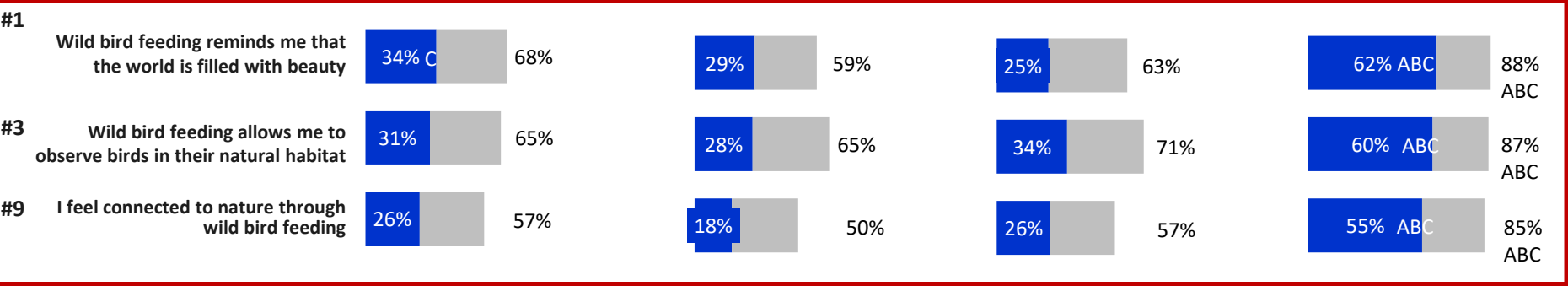
- Low/Moderates and Highly Involved connect feeding more strongly with their love for gardening and how wild birds enhance the beauty of their garden

Prospects
A
(n=200)

Lapsed Customers
B
(n=150)

Low / Moderate
Customers
C
(n=200)

Highly Involved
Customers
D
(n=200)



■ 5-Completely describes ■ 4 describes

Customers also spurred by the entertainment value

- There is an element of nurturance for all segments

Prospects
A
(n=200)

Lapsed Customers
B
(n=150)

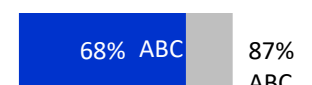
Low / Moderate
Customers
C
(n=200)

Highly Involved
Customers
D
(n=200)

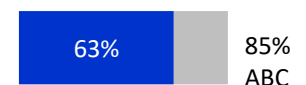
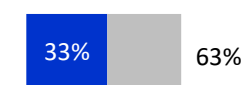
Watching wild birds interact is entertaining



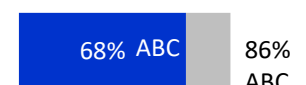
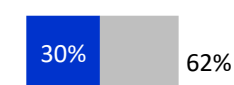
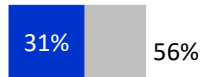
Feeding wild birds helps them during times when food is scarce



I feel like I help wild birds when I feed them



I love all animals, including birds, so feeding them brings me joy



■ 5-Completely describes ■ 4 describes

Prospects are notably motivated by the positive impact they can have on birds and their natural habitat ... laddered to environment

- These statements are not positioned as a call to political action

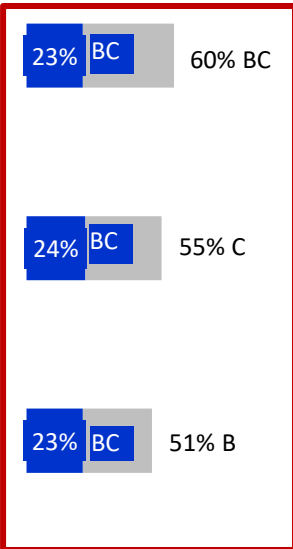
Prospects
A
(n=200)

Lapsed Customers
B
(n=150)

Low / Moderate
Customers
C
(n=200)

Highly Involved
Customers
D
(n=200)

I can't control much of what happens in the environment, but wild bird feeding allows me to positively contribute in my own yard / garden



Wild bird feeding promotes pollination and seed distribution



The natural environment has been disrupted so wild bird feeding is my way of helping



■ 5-Completely describes ■ 4 describes

It follows that the messaging platforms that consistently perform the strongest are Beauty/Sensory and Independence, which together embody the top motivators identified ... to experience and connect with nature and its inherent beauty

- In alignment with their heightened sense to care for nature & the environment, Prospects connect more strongly with the Idealism messaging than Lapsed & Low/Moderates but suggest less activism as a tone

	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

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

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