

# Native Dog Food Package & Message Testing Research

- Market Research Report

- Prepared for



- June 2023



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# Study Overview





# Study Overview



Package and message testing for Native dog food to recommend a positioning strategy for the brand

Online survey with people who have highly active dogs

- **61 Native Customers**
  - Use Native dog food currently or used it in the past
- **205 Target Audience Prospects**
  - Never used Native dog food
- Survey fielded May 31-June 9

**50%** of dog owners qualified to take the survey

- Rated their dog's activity level 3, 4 or 5 on 5-point scale
- Dog weighs 15+ lbs.
- Excluded breeds: Bulldog, Cockapoo, Dachshund, French bulldog, Goldendoodle, Shih tzu, Yorkshire terrier

Based on external panel recruitment

Respondents recruited from Kent retail email list (417 people) and an external national research panel

- Participants from the Kent list received a \$10 Amazon gift card as incentive for participation

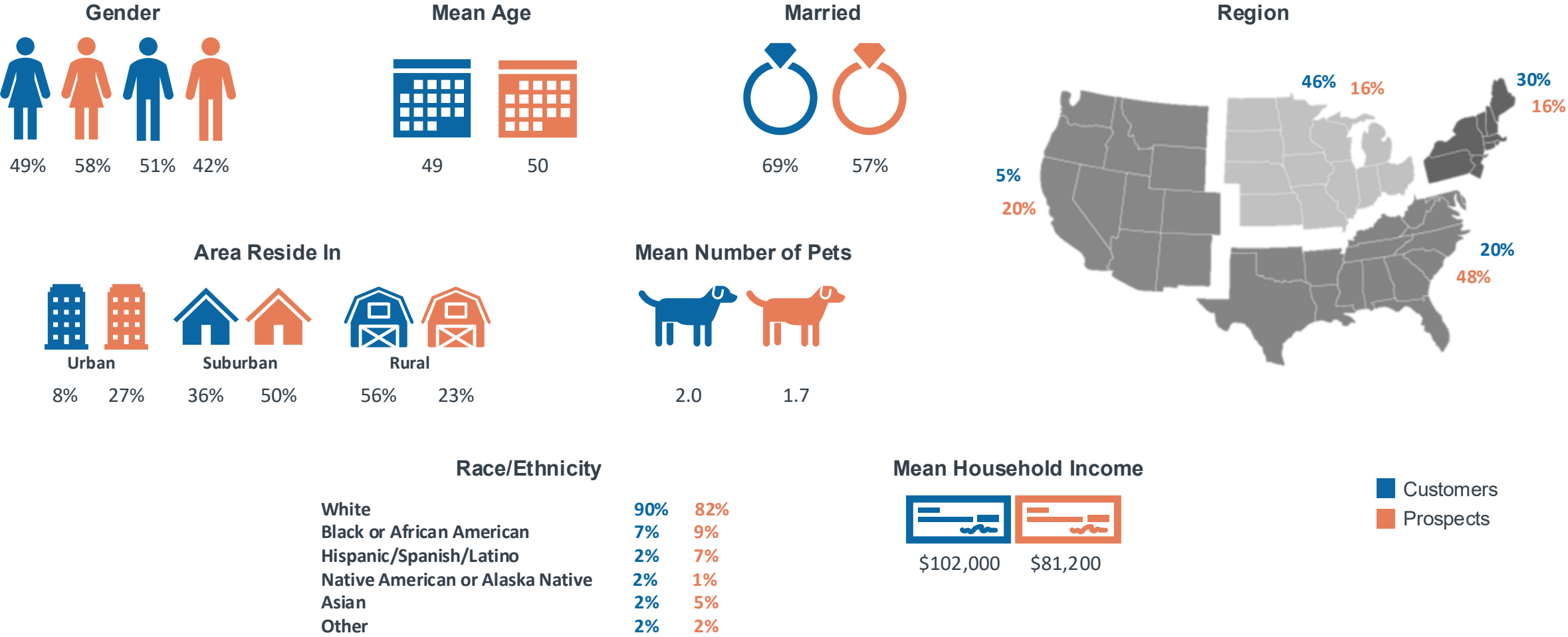


	Kent List	Research Panel	Total
Customers	49	12	61
Prospects	8	197	205
Total	57	209	266



# Respondent Profile

Native Customers are more likely to live in rural areas and have higher income vs. the general population of active dog owners.



Q1. What is your age? Q2. What is your gender? Q3. What pets do you have in your household? Q47. What state do you live in? Q48. How would you describe the area where you live? Q49. What is your marital status? Q50. What is your household income? Q51. What race/ethnicity do you consider yourself? C n=61, P n=205



# Summary of Key Findings and Recommendations

# Native Customers

Native Customers are different than the broader market of active dog owners. They are likely to:

- Live in a rural area (56%)
- Have many dogs (51% have 5+ dogs!)
- Hunt with their dog (44% hunt vs. only 11% of Prospects)

There is opportunity to broaden Native's customer base through marketing/messaging and distribution.



Other common dog activities among both Customers and the broader market of Prospects include running, walking, frisbee and hiking.



# Shopping for Dog Food

The majority of people buy dog food in-person, but half of Prospects and 40% of Customers buy online at least sometimes – indicating there is a market for online distribution.

- Prospects most commonly buy from a national big box store, national pet food chain or grocery store.
- Native Customers most commonly buy from a local feed dealer – which makes sense given that is Native's main distribution channel.





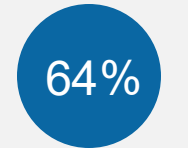
# Native Awareness, Perception and Use



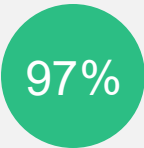
**22% of Prospects have heard of Native**, presenting opportunity to grow awareness

- **71% of those aware have a very positive perception** of the brand

Among those who ever used Native...



**currently use it**



**are very satisfied with it**  
suggesting the reason for discontinued use is not dissatisfaction

3 competitor brands hold two-thirds share of the “active dog” food market



# Packaging

- Concept B is preferred most by both Customers and Prospects. And, Concept B fares best among Customers and Prospects on attention-grabbing, fits with Native, and likelihood to buy.
- The current packaging is polarizing with more than one-quarter of Prospects NOT likely to buy it. Heat map analysis shows that the larger dog images are liked by many more people than the images of people with their dogs.

Concept B



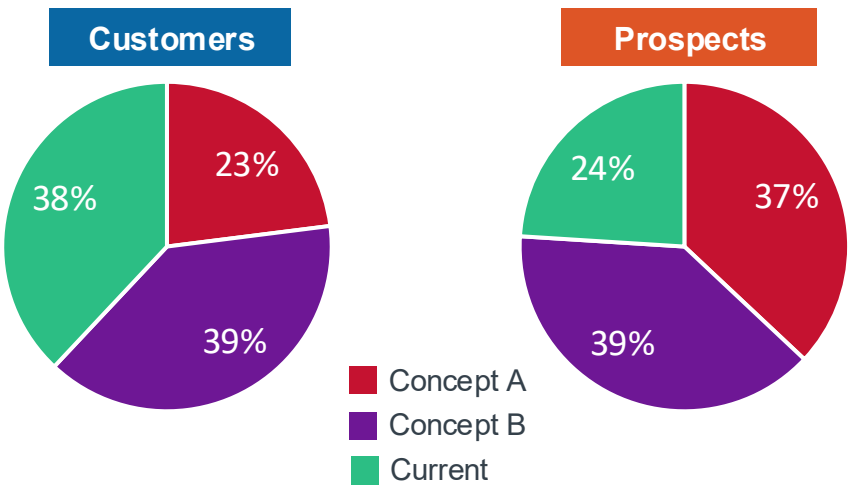
Concept A



Current

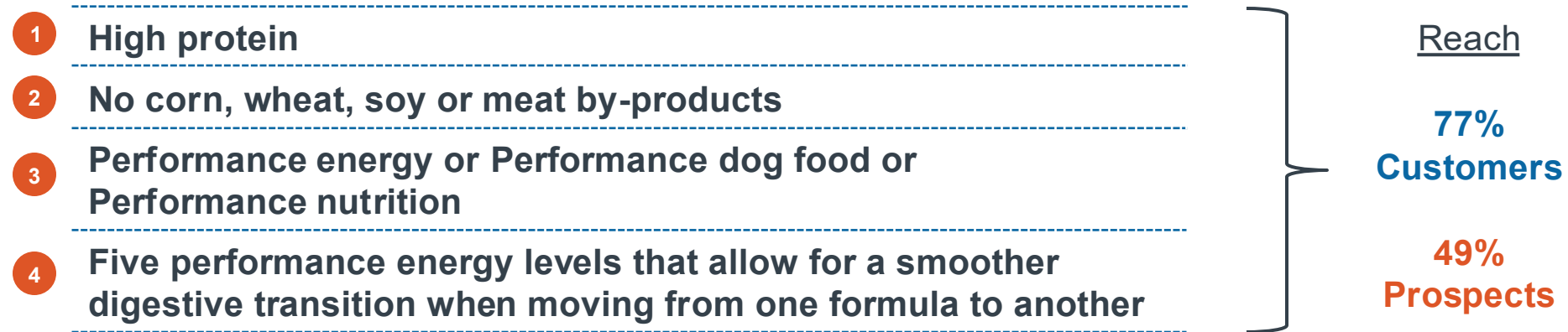


Preferred Packaging



# Messaging

The following message bundle should be the focus on Native packaging and in communications. Together, these messages capture the greatest proportion of Customers and Prospects.



Many brands are associated with **high protein**, but Native has the opportunity to differentiate itself on **no corn, wheat, soy or meat by products** and the **performance** messages. Additionally, **real meat**, **all-natural**, and to a lesser degree **contains antioxidants** and **non-GMO** are competitor attributes that are important to Customers and Prospects – yet no competitor owns these. If it's possible to make these claims, they should be considered as part of Native's messaging strategy.

# Detailed Findings



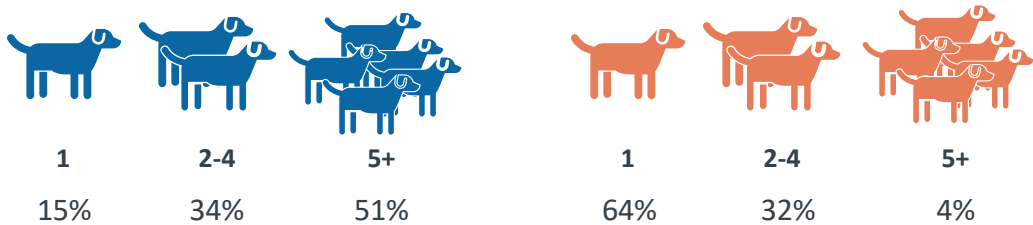
# Current Market



# Dog Profile

Native Customers are likely to have many dogs.

## Number of Dogs in Household



## Top Breeds

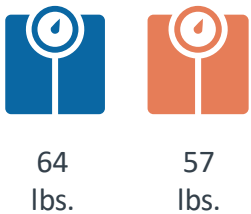
Labrador Retriever	15%
German Shorthaired Pointer	11%
German Shepherd	7%
Border Collie	5%
Brittany Spaniel	5%

## Top Breeds

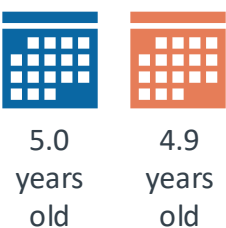
Labrador Retriever	11%
German Shepperd	10%
Golden Retriever	8%
Boxer	5%

■ Customers  
■ Prospects

## Mean Dog Weight



## Mean Dog Age



## Mean Time of Ownership

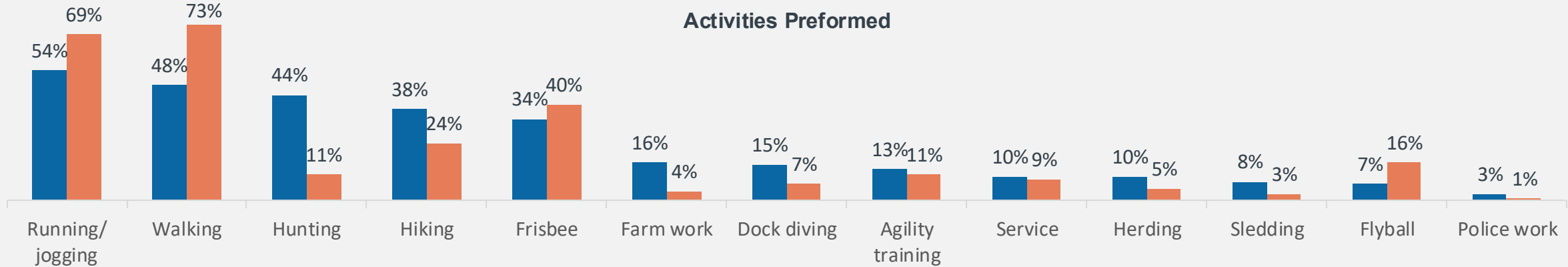
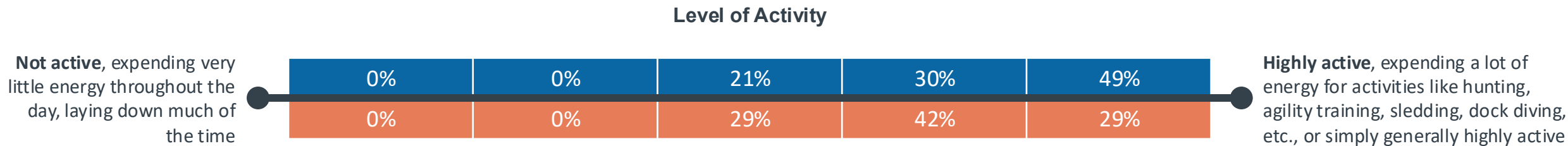


Q4. How many dogs do you have in your household? Q6. How much does your dog weigh? If your dog is not fully grown, roughly how much will he/she weigh once fully grown? Q7. Which breed is your dog? Q8. How old is your dog? Q9. Approximately how long have you had your dog? C n=61, P n=205



# Dog Activity

Compared to Prospects, Native Customers' dogs are more highly active and much more likely to hunt. Common dog activities among both Customers and Prospects are running, walking, hiking and frisbee.

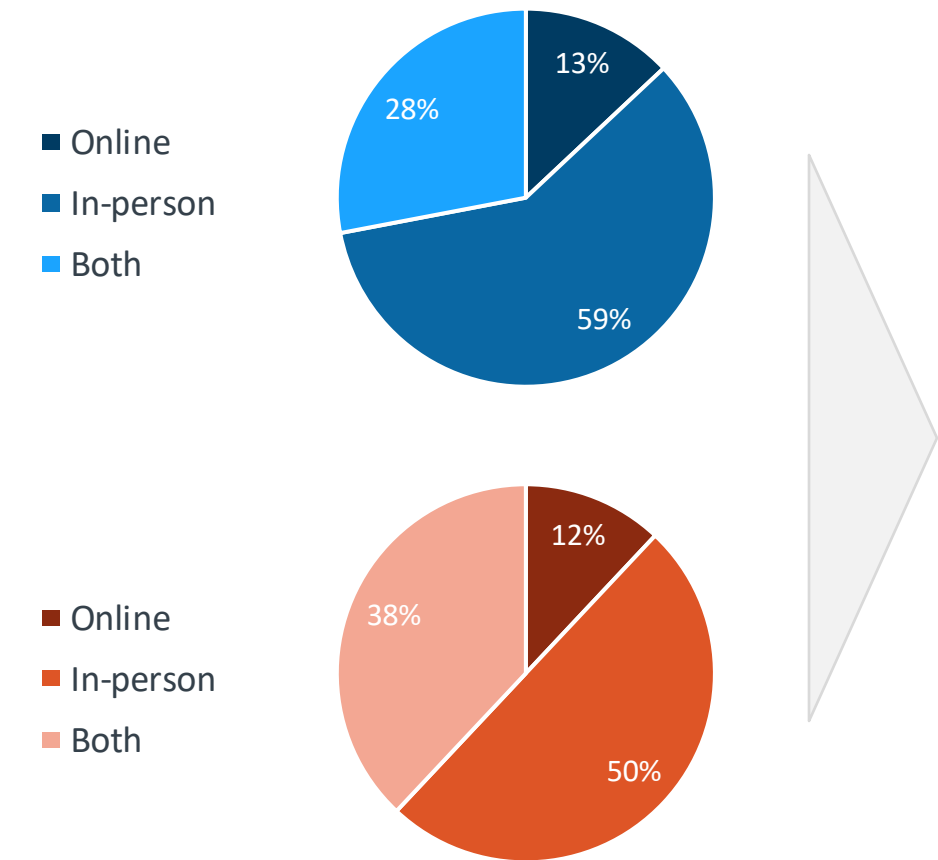


■ Customers  
■ Prospects

Q5. How would you rate your dog's level of activity? Q10. Earlier you said your dog is highly active. Which activities does your dog perform? Select all that apply. C n=61, P n=205

# Dog Food Purchasing

The majority of people buy dog food in-person. Prospects are most likely to shop at national big box retailers or pet store chains, but Customers are more apt to shop at local feed dealers.



	Customers		Prospects	
	Online	In-person	Online	In-person
National big box retailer, e.g., Walmart, Target, Costco	24%	15%	44%	57%
National pet store chain, e.g., PetSmart, Petco, Pet Value	32%	21%	50%	48%
Regional/local pet store	8%	13%	14%	18%
Grocery store	8%	11%	22%	38%
Local feed dealer	20%	58%	6%	8%
Amazon or other online-only retailer	51%	-	64%	-
Other	28%	17%	12%	6%

■ Customers  
■ Prospects

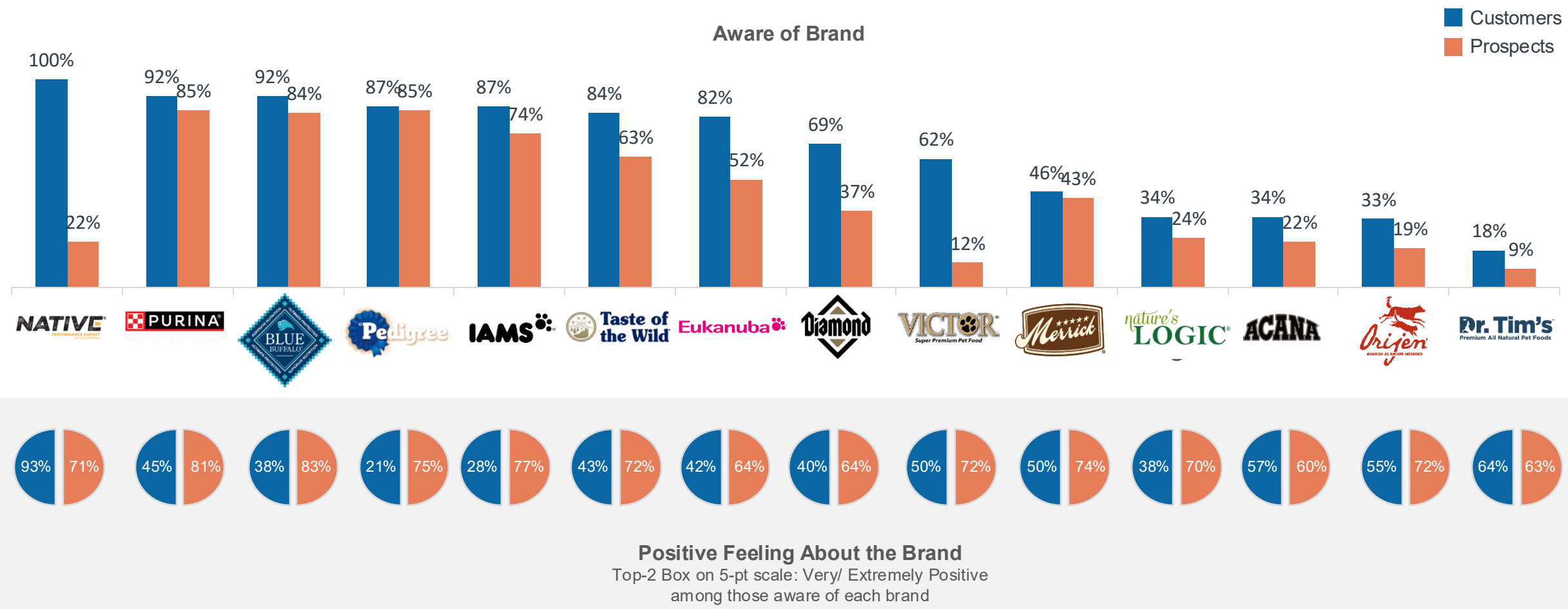
Q17. Do you typically buy [brand] in a physical store or online? C n=61, P n=205 Q18. Where do you typically buy [brand] in-person? Select all that apply. C n=53, P n=181  
Q19. Where do you typically buy [brand] online? Select all that apply. C n=25 (small base), P n=101





# Brand Awareness & Perceptions

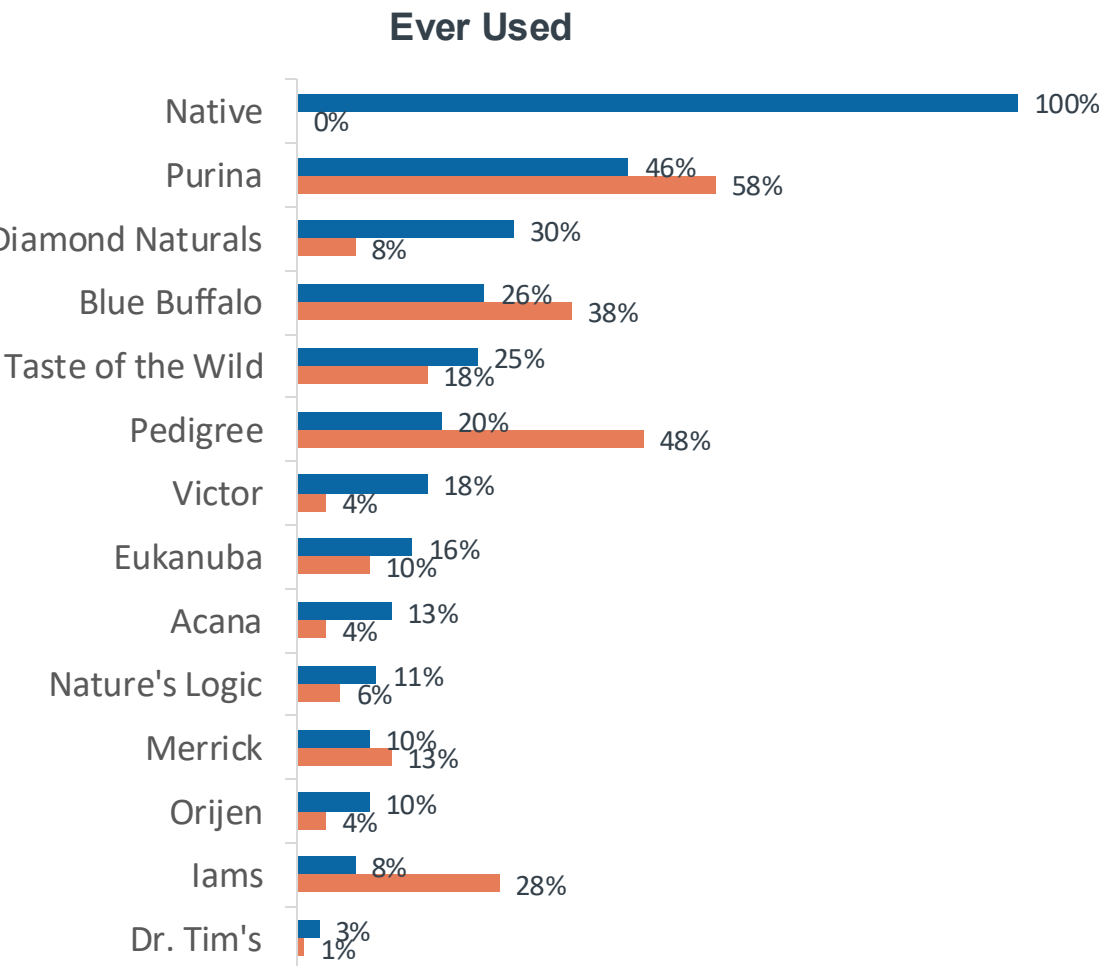
22% of Prospects are aware of Native dog food, 71% of whom feel positively about the brand.



Q11. Which of the following dog food brands have you heard of? Select all that apply. C n=61, P n=205 Q12. What is your perception of each brand? Sample sizes vary by brand.

# Brand Use & Satisfaction

Three competitors have two-thirds of the active dog food market – Purina, Blue Buffalo and Pedigree. Among Native users, satisfaction is very high.



**64%**  
of Customers  
**Currently Use  
Native**

**97%**  
of Customers are  
**Extremely/Very  
Satisfied with Native**

**66%**  
of Prospects  
**Currently Use 3 Brands**

- Purina 29%
- Blue Buffalo 20%
- Pedigree 17%

**88-97%**  
of these brands' users are  
**Extremely/Very  
Satisfied**

■ Customers  
■ Prospects

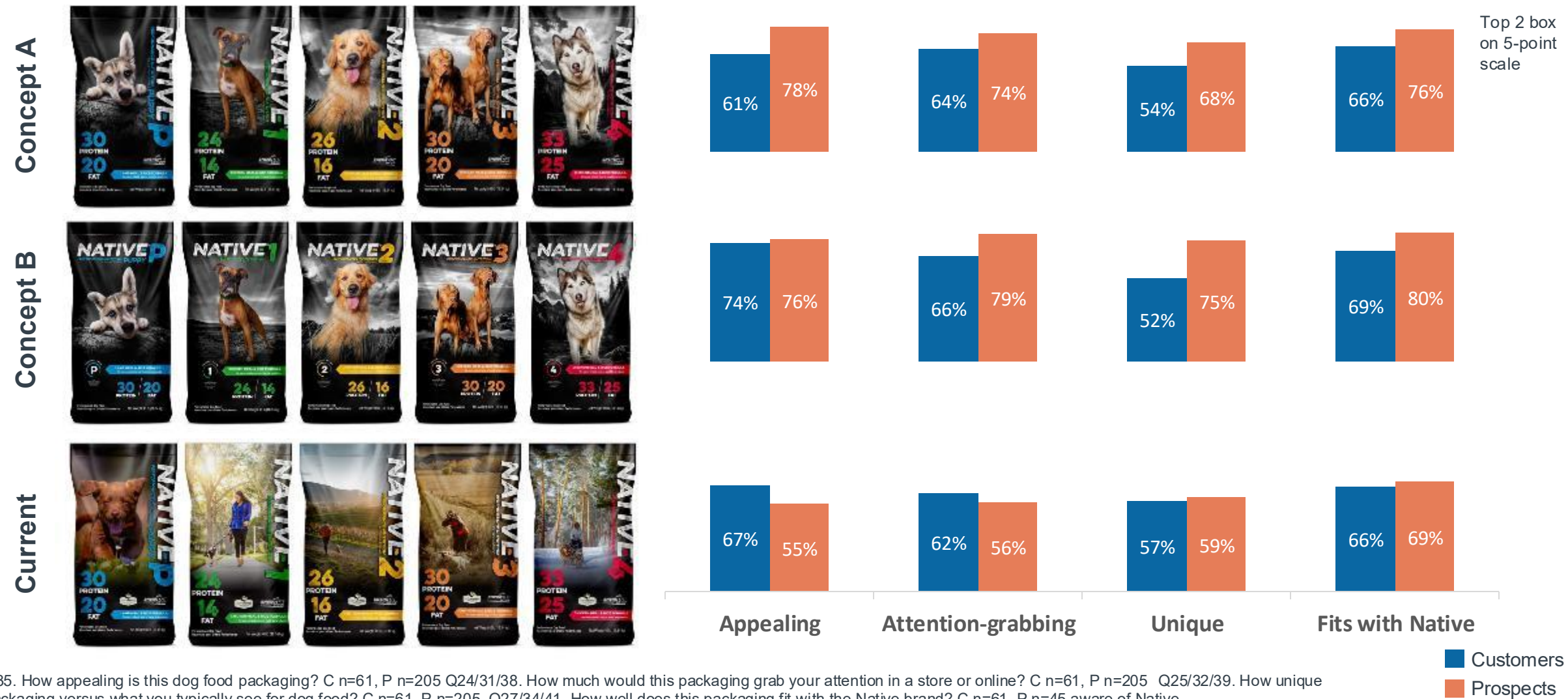
Q13. Which brands have you ever used for your highly active dog(s)? Select all that apply. C n=61, P n=205  
Q14. Which brand are you currently using for your highly active dog(s)? C n=61, P n=205  
Q16. How satisfied are you with [brand]? Sample sizes vary by brand

# Packaging



# Reaction to Packaging

Prospects react more positively to Concepts A and B vs. the current packaging. Customers rate all three options fairly similarly.





# Concept A Likes & Dislikes Customers

Among Customers, the most liked parts of the packaging are the puppy, pair of dogs on #3, and the protein and fat content. 10-15% dislike each dog image; otherwise, <3% dislike any other area. Two-thirds say there is nothing they dislike.

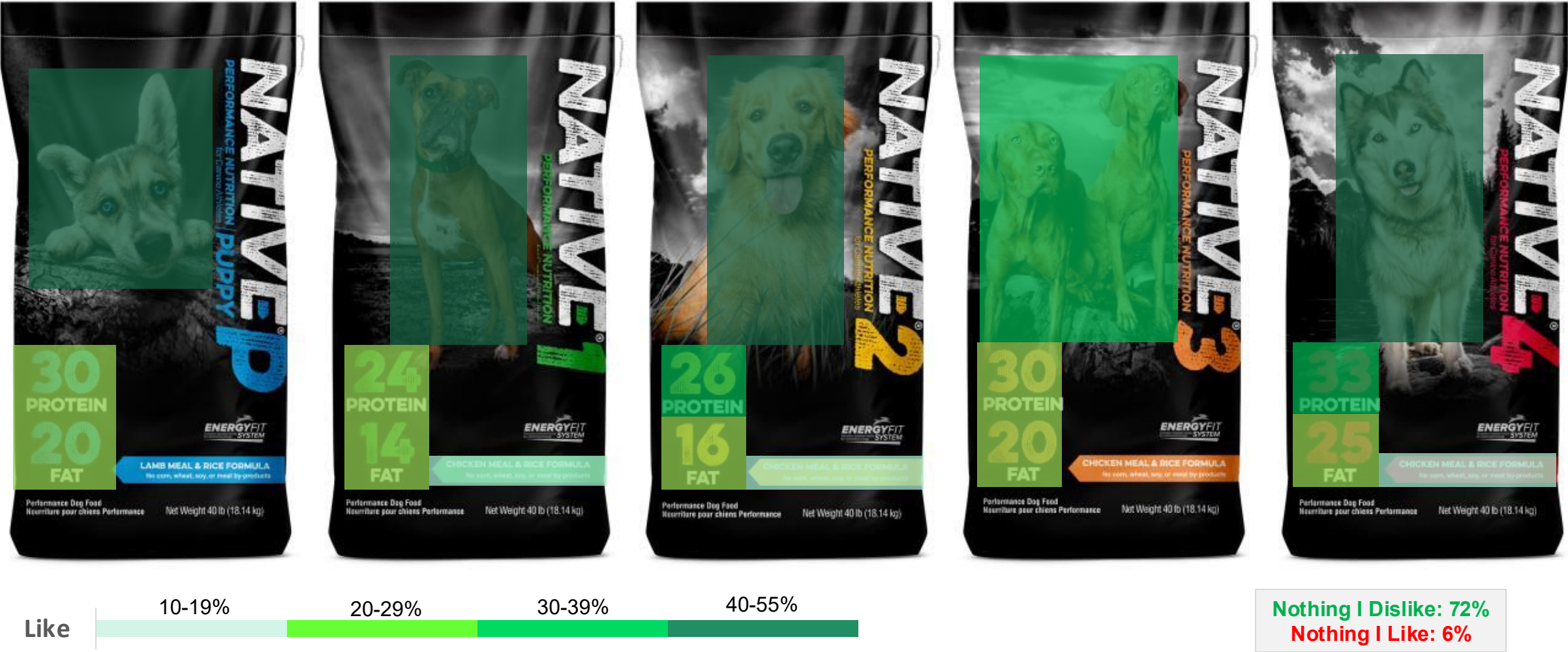


Q22. Click on the areas of the packages that make you like this product and more likely to purchase it. Q23. Now, click on the areas of the packages that make you dislike this product and less likely to purchase it. n=61

Concept A Likes & Dislikes

Prospects

Among Prospects, the most liked parts of the packaging are the dogs, the protein and fat content, and – to a lesser degree – the chicken and rice formula. There are no areas that are disliked by more than 7%. The majority say there is nothing they dislike.

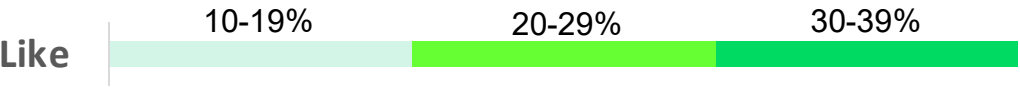


Q22. Click on the areas of the packages that make you like this product and more likely to purchase it. Q23. Now, click on the areas of the packages that make you dislike this product and less likely to purchase it. n=205



# Concept B Likes & Dislikes Customers

Customers like each area of the packaging to a similar degree as in Concept A. However, even more say there's nothing they dislike.



Nothing I Dislike: 75%

Nothing I Like: 11%

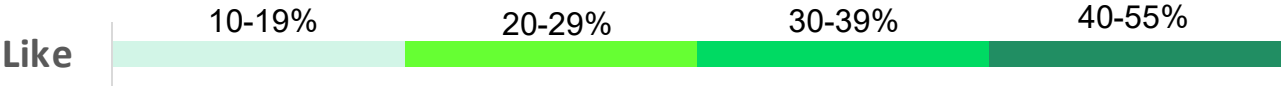
Q29. Click on the areas of the packages that make you like this product and more likely to purchase it. Q30. Now, click on the areas of the packages that make you dislike this product and less likely to purchase it. n=61



Concept B Likes & Dislikes

Prospects

Prospects are more apt to be drawn to protein and the number/level in Concept B vs. Concept A.



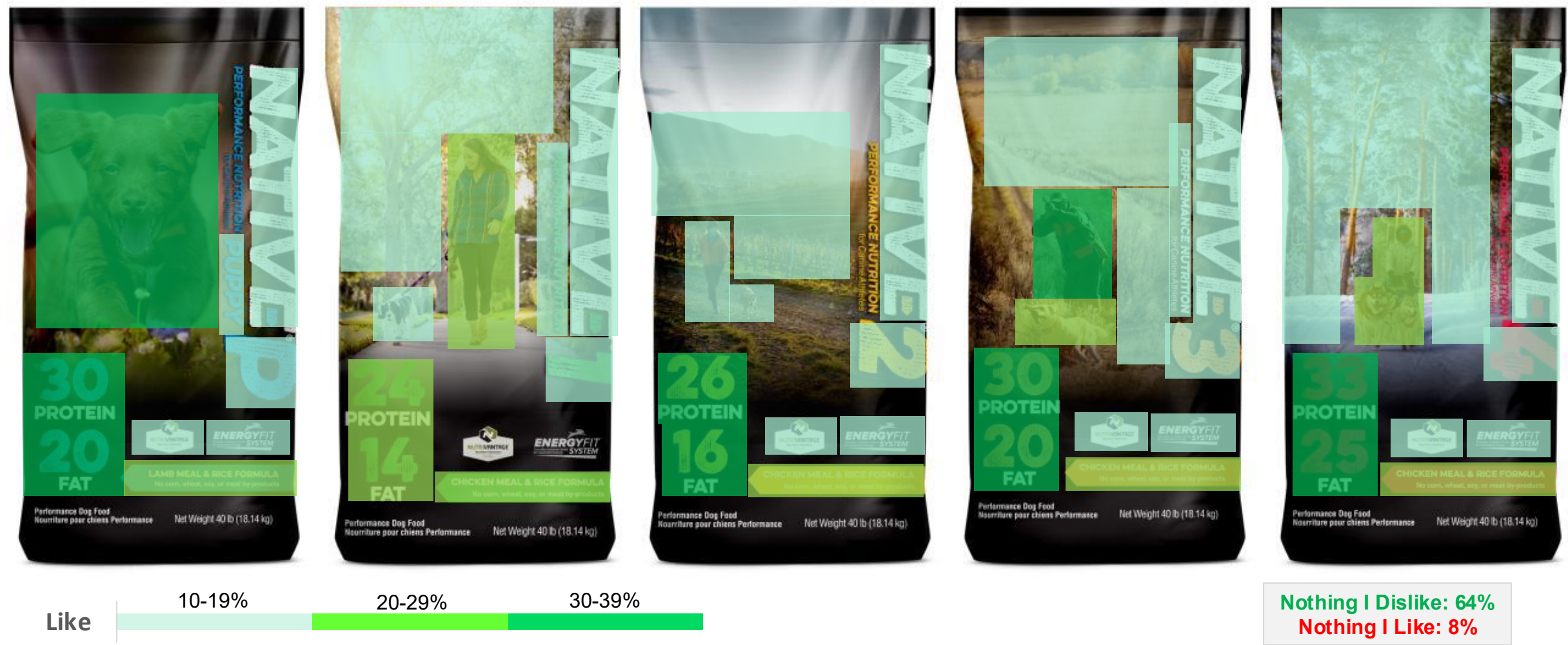
Nothing I Dislike: 75%  
Nothing I Like: 7%

Q29. Click on the areas of the packages that make you like this product and more likely to purchase it. Q30. Now, click on the areas of the packages that make you dislike this product and less likely to purchase it. n=205



# Current Packaging Likes & Dislikes Customers

Overall, smaller dogs do not draw as much attention and are not as well liked as the larger featured dogs. Among Customers, the hunter is the most favorable person shown.



Q36. Click on the areas of the packages that make you like this product and more likely to purchase it. Q37. Now, click on the areas of the packages that make you dislike this product and less likely to purchase it. n=61

# Current Packaging Likes & Dislikes Prospects

Prospects much prefer the larger featured puppy over the smaller images of dogs with people. In particular, prospects don't like the image of a hunter shooting a gun.

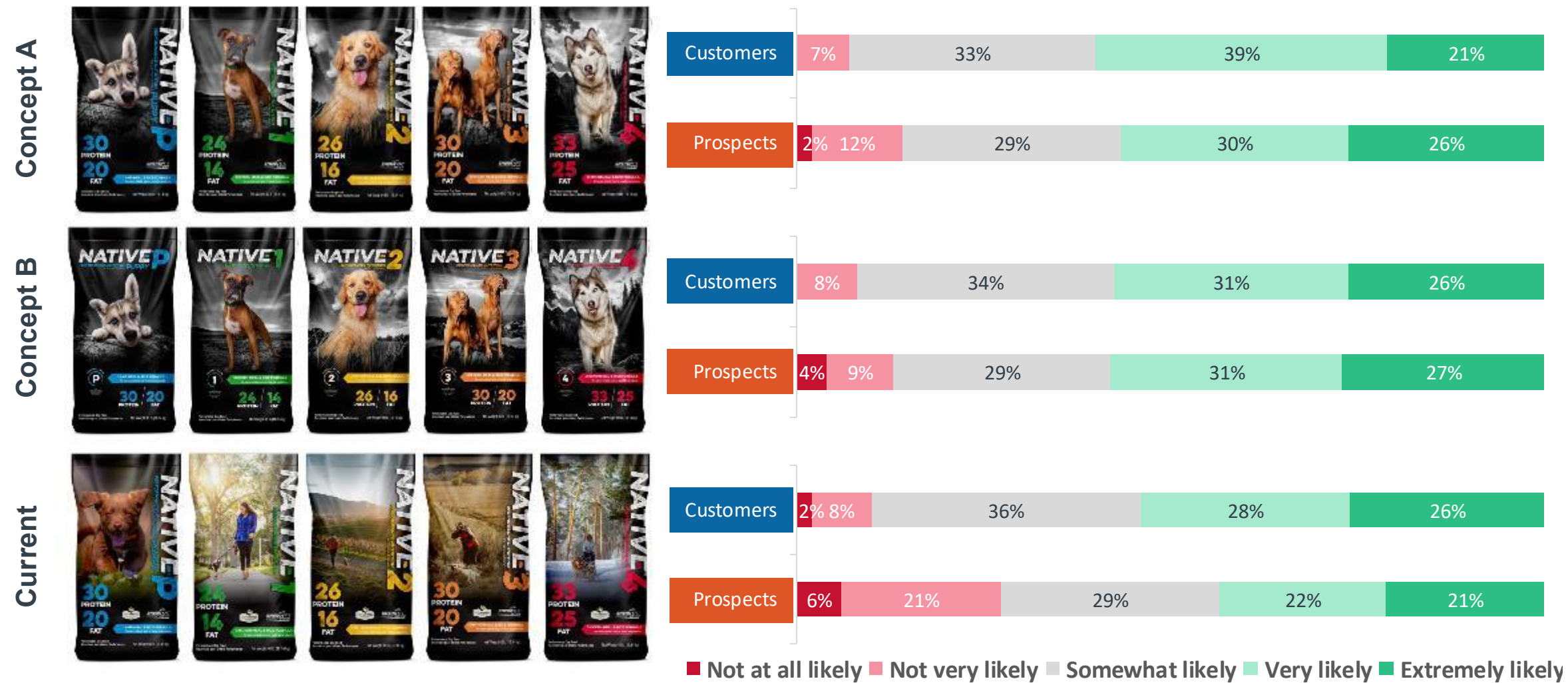


Q36. Click on the areas of the packages that make you like this product and more likely to purchase it. Q37. Now, click on the areas of the packages that make you dislike this product and less likely to purchase it. n=205



# Likely to Buy

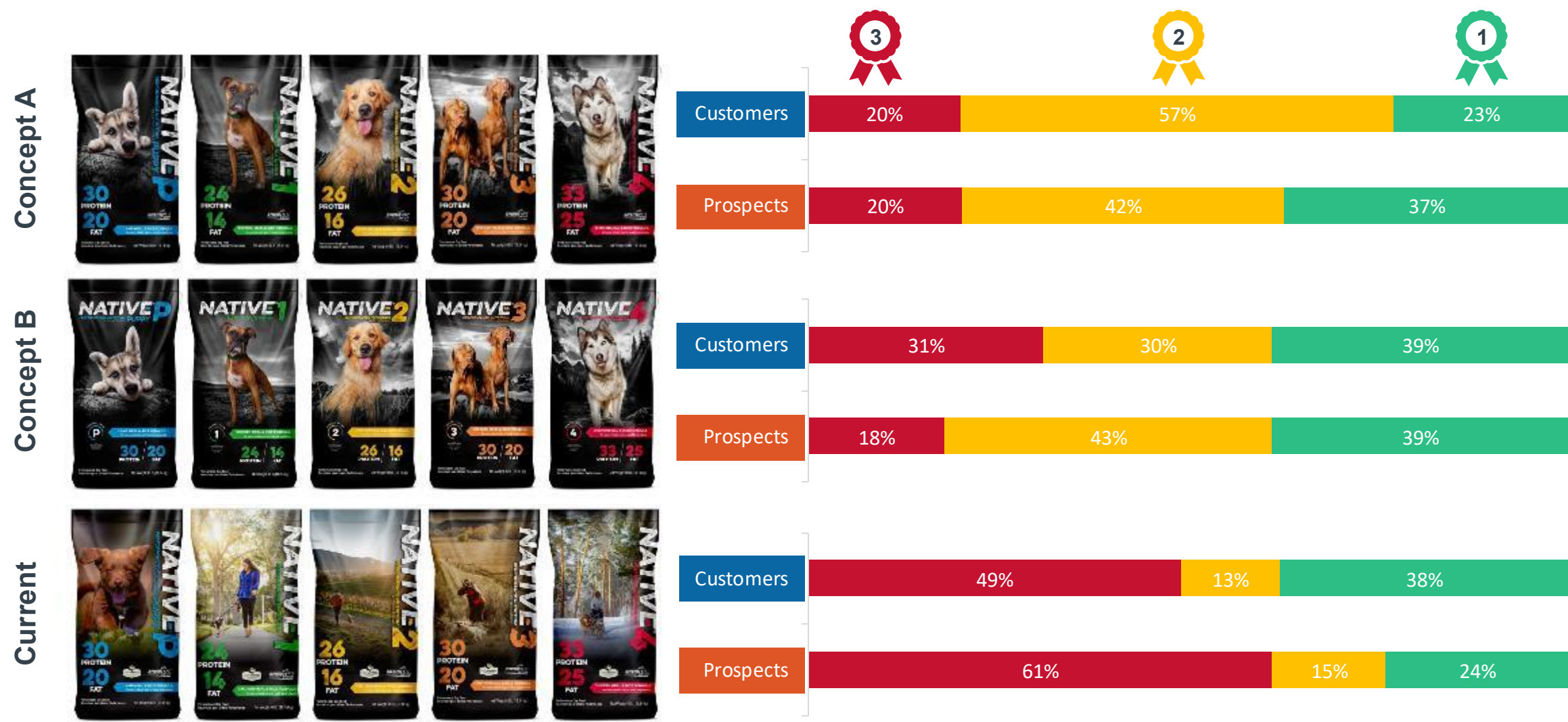
Overall, Concept B fares best among Customers and Prospects on likelihood to buy. The current packaging is polarizing with more than one-quarter of Prospects NOT likely to buy it.



Q26/33/40. If you saw this packaging, how likely would you be to purchase this dog food? C n=61, P n=205

# Packaging Preference

Concept B is most preferred among Customers and Prospects. The Current packaging is least preferred.



Q42. Please rank the packaging in order of preference. Type 1 next to the package you like best, 2 next to the package you like second best, and 3 next to the package you like least. C n=61, P n=205

# Messaging





# 17 Native Messages Included in TURF Analysis

TURF stands for “Total Unduplicated Reach and Frequency” and is used to identify the **optimal set** of messages for Native

Nutrition	1. High protein
	2. High fat
	3. Nutrivantage
	4. Nutrition optimizer
	5. Exclusive blend of organic macromolecules, trace minerals, antioxidants and chelating agents
	6. Food supplement designed to provide optimal nutritional supplementation to your dog’s digestive tract
Energy	7. EnergyFIT System
	8. EnergyFIT (FIT = Formula Intensity Technology)
	9. Transition between energy levels for maximized performance
	10. Five performance energy levels that allow for a smoother digestive transition when moving from one formula to another
Ingredients	11. Chicken meal and rice formula
	12. No corn, wheat, soy or meat by-products
Performance	13. Performance energy
	14. Performance nutrition
	15. Performance dog food
	16. For canine athletes
	17. At the core of every athlete is the native desire to do their best

# Optimal Message Combinations

Below is the optimal set of messages that, with limited packaging space, will attract the greatest proportion of Customers to the Native brand. Although high fat is appealing to Customers, adding it to this set of messages doesn't add reach.

Customers		
	Message	Reach
Best single message	High protein	36%
Add a 2 <sup>nd</sup> ...		+23
Best two messages	No corn, wheat, soy or meat by-products	59%
Add a 3 <sup>rd</sup> ...		+13
Best three messages	Performance energy or Performance dog food or Performance nutrition	72%
Add a 4 <sup>th</sup> ...		+5
Best four messages	Five performance energy levels that allow for a smoother digestive transition when moving from one formula to another	77%
Add a 5 <sup>th</sup> ...		+2
Best five messages	EnergyFIT (FIT = Formula Intensity Technology) or Transition between energy levels for maximized performance	79%

The value of adding more messages diminishes after the top 3.

# Optimal Message Combinations

Similar to Customers, describing Native dog food as having high protein, no corn, wheat soy or meat by-products, and the ability to enhance their dog's performance will capture the greatest proportion of Prospects. The optimal combination only differs from Customers at the 5<sup>th</sup> message – making it easy to market to everyone with a similar message.

Prospects		
	Message	Reach
Best single message	High protein	28%
Add a 2 <sup>nd</sup> ...		+9
Best two messages	No corn, wheat, soy or meat by-products	37%
Add a 3 <sup>rd</sup> ...		+7
Best three messages	Performance energy or Performance dog food or Performance nutrition	44%
Add a 4 <sup>th</sup> ...		+5
Best four messages	Five performance energy levels that allow for a smoother digestive transition when moving from one formula to another	49%
Add a 5 <sup>th</sup> ...		+2
Best five messages	EnergyFIT System or At the core of every athlete is the native desire to do their best	51%

} The value of adding messages diminishes after the top 4.

# Message Bundling Simulator

The Native marketing team can assess reach for any combination of messages using an Excel-based simulator (screenshot shown here).

1. Select messages
2. Select Customers or Prospects from drop-down menu
3. See resulting reach that shows the % of the audience captured by the selected message combination
4. Compare multiple message combinations

ROSCOW  
MARKET RESEARCH

**Native Dog Food Messaging TURF Analysis**

1

**Message Combination 1**  
☐ 1. High protein  
☒ 2. High fat  
☐ 3. Nutrivantage  
☐ 4. Nutrition optimizer  
☐ 5. Macromolecules, minerals, antioxidants & chelating agents  
☐ 6. Optimal nutritional supplementation for your dog's digestive tract  
☐ 7. EnergyFIT System  
☐ 8. EnergyFIT (FIT = Formula Intensity Technology)  
☐ 9. Transition between energy levels for maximized performance  
☐ 10. Five performance energy levels  
☐ 11. Chicken meal and rice formula  
☒ 12. No corn, wheat, soy or meat by-products  
☐ 13. Performance energy  
☐ 14. Performance nutrition  
☒ 15. Performance dog food  
☐ 16. For canine athletes  
☐ 17. At the core of every athlete is the native desire to do their best.

2

Native Customers

3

**Message Combination 1**  
**Unduplicated Reach** 65.6%  
**Average Frequency** 1.2  
**Sample Size** 61

4

**Message Combination 2**  
☐ 1. High protein  
☐ 2. High fat  
☐ 3. Nutrivantage  
☐ 4. Nutrition optimizer  
☐ 5. Macromolecules, minerals, antioxidants & chelating agents  
☐ 6. Optimal nutritional supplementation to your dog's digestive tract  
☐ 7. EnergyFIT System  
☐ 8. EnergyFIT (FIT = Formula Intensity Technology)  
☐ 9. Transition between energy levels for maximized performance  
☐ 10. Five performance energy levels  
☐ 11. Chicken meal and rice formula  
☒ 12. No corn, wheat, soy or meat by-products  
☐ 13. Performance energy  
☐ 14. Performance nutrition  
☒ 15. Performance dog food  
☐ 16. For canine athletes  
☐ 17. At the core of every athlete is the native desire to do their best.

Prospects

**Message Combination 2**  
**Unduplicated Reach** 29.3%  
**Average Frequency** 1.1  
**Sample Size** 205

**Message Combination 3**  
☒ 1. High protein  
☐ 2. High fat  
☐ 3. Nutrivantage  
☐ 4. Nutrition optimizer  
☐ 5. Macromolecules, minerals, antioxidants & chelating agents  
☐ 6. Optimal nutritional supplementation to your dog's digestive tract  
☐ 7. EnergyFIT System  
☐ 8. EnergyFIT (FIT = Formula Intensity Technology)  
☐ 9. Transition between energy levels for maximized performance  
☐ 10. Five performance energy levels  
☒ 11. Chicken meal and rice formula  
☒ 12. No corn, wheat, soy or meat by-products  
☐ 13. Performance energy  
☐ 14. Performance nutrition  
☐ 15. Performance dog food  
☐ 16. For canine athletes  
☐ 17. At the core of every athlete is the native desire to do their best.

Prospects

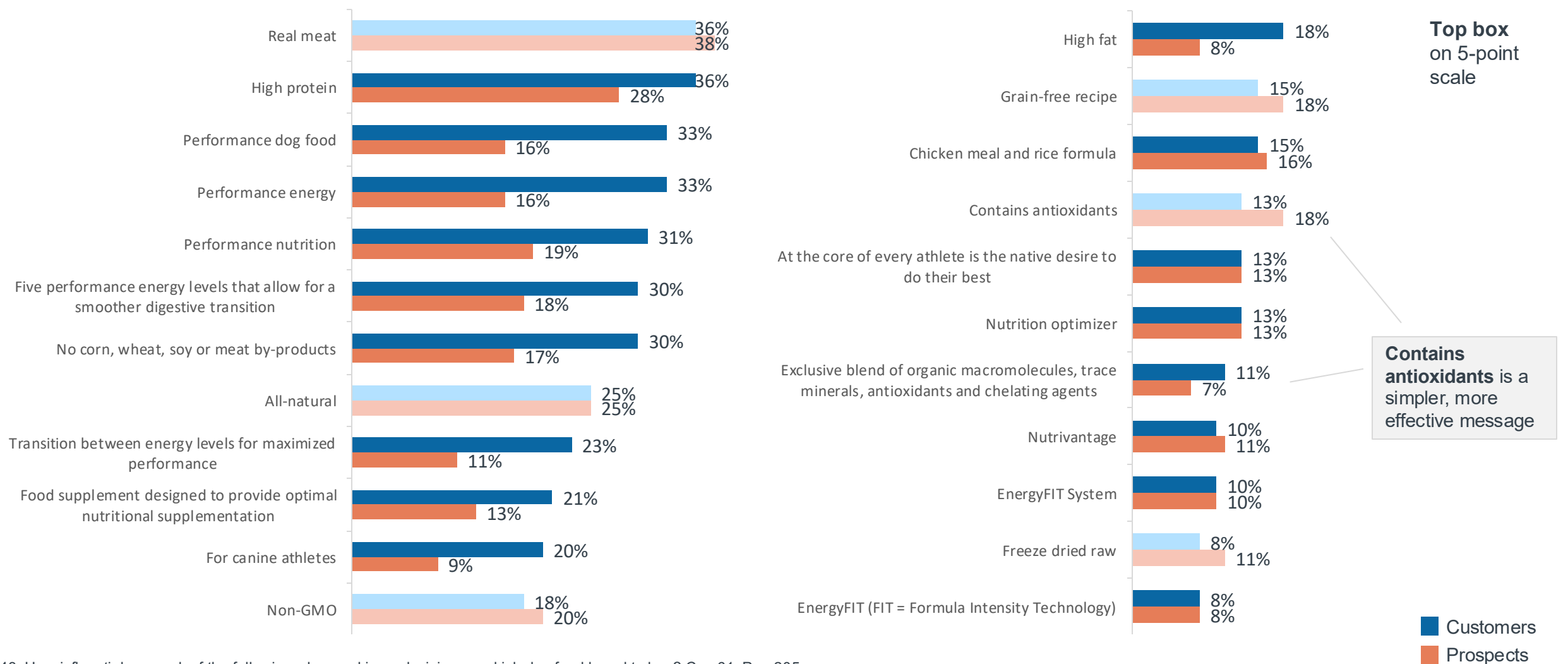
**Message Combination 3**  
**Unduplicated Reach** 44.4%  
**Average Frequency** 1.4  
**Sample Size** 205

Unduplicated reach: % of sample who rated at least one message as being extremely influential  
Average frequency: Average number of messages per person rated as being extremely influential



# Competitor Messages

When looking at Native and competitor messages individually, **real meat** and **high protein** are most important to both Customers and Prospects. Other competitor attributes are also important to Prospects.

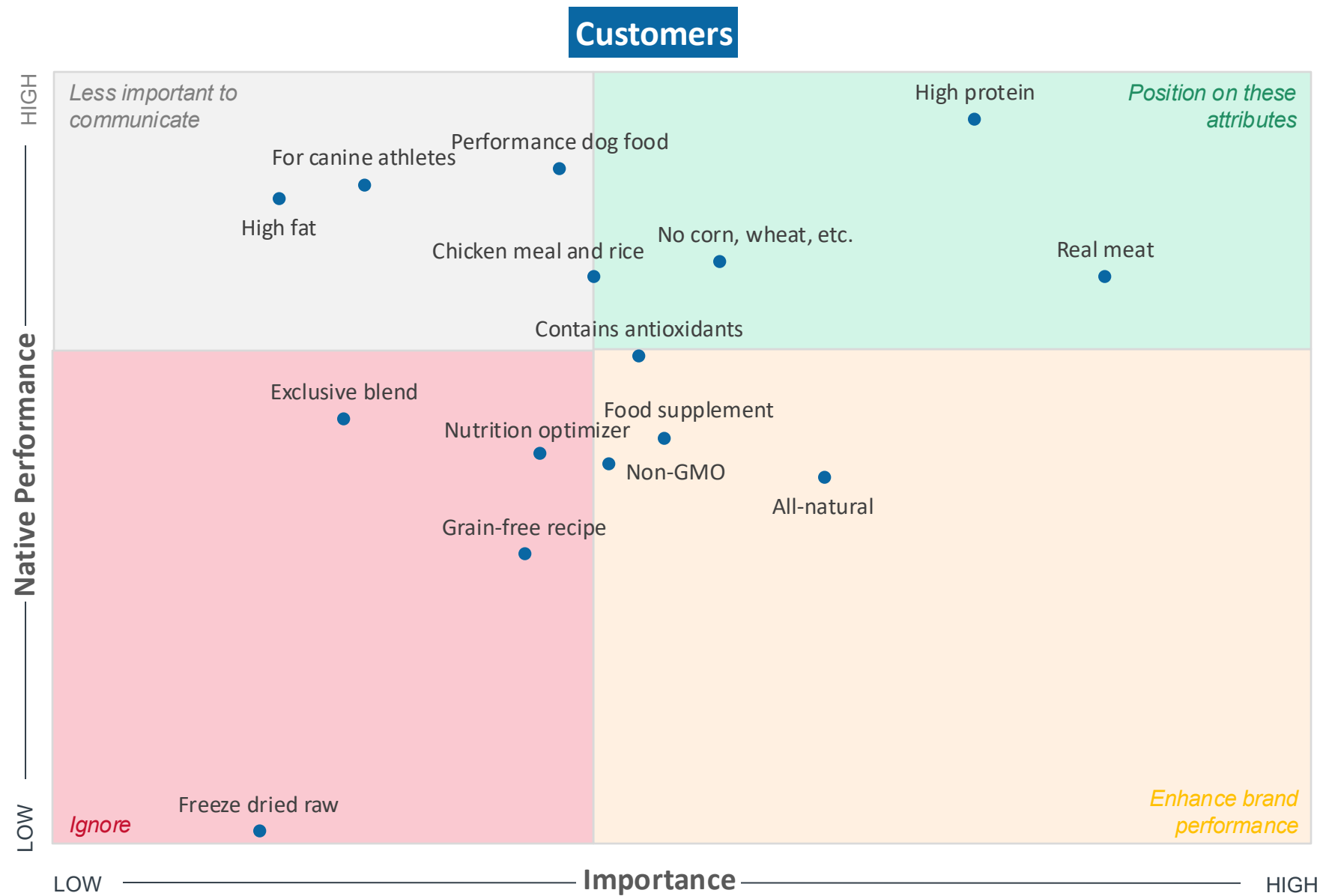


Q43. How influential are each of the following when making a decision on which dog food brand to buy? C n=61, P n=205

# Native Performance on Attributes

Among Customers, Native performs well on key attributes they see as important (including a competitor attribute) – which makes sense since they chose Native dog food for their dog.

- **High protein**
  - **Real meat**
  - **No corn, wheat, soy or meat by-products**
- There are several attributes Customers feel are important that they do not associate with Native, two of which are competitor attributes.
- **Food supplement designed to provide optimal nutritional supplementation**
  - **Non-GMO**
  - **All-natural**

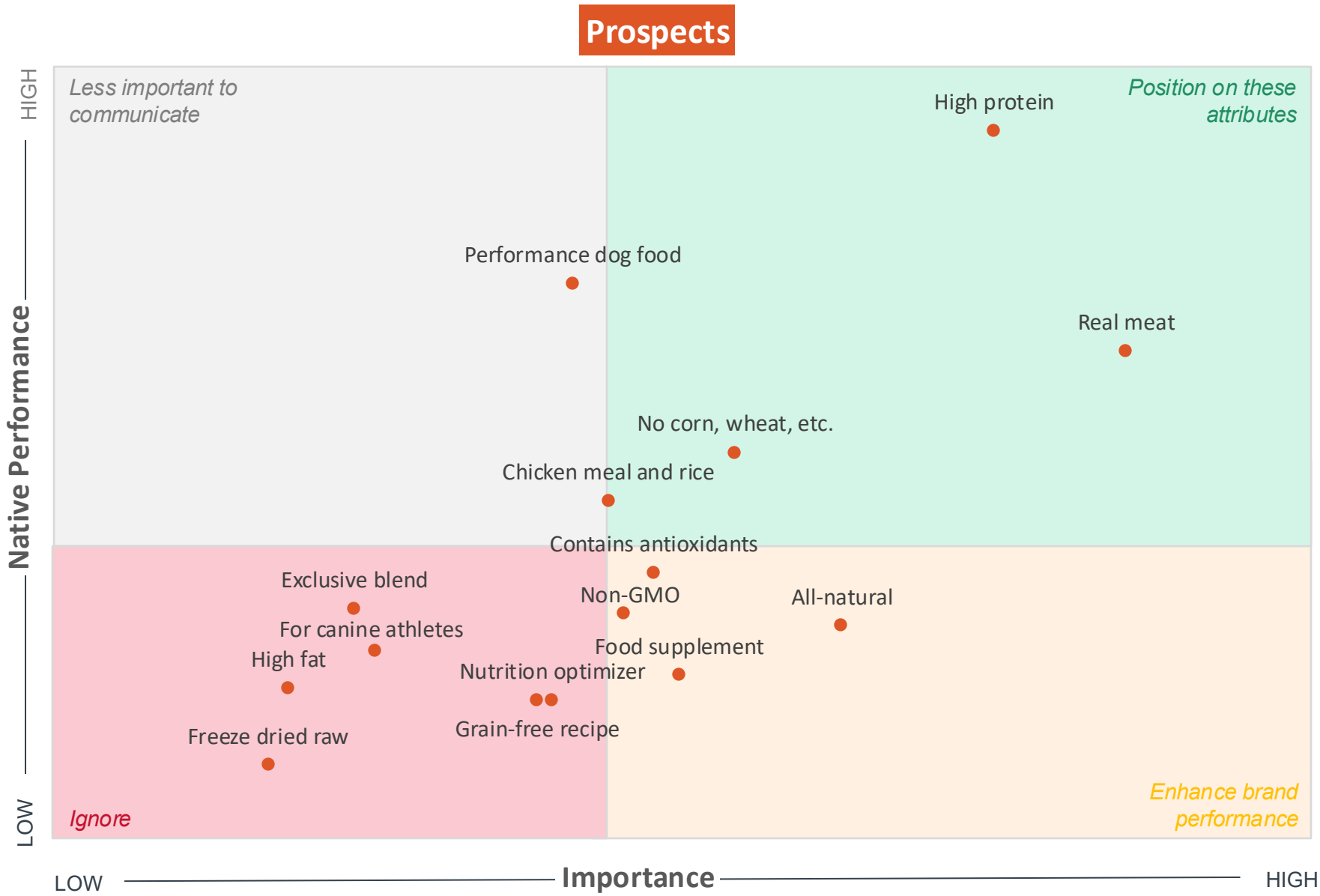


# Native Performance on Attributes

Important attributes that Prospects feel Native performs well on are **high protein** and **no corn, wheat, soy or meat by-products**.

Prospects also believe Native offers **real meat** – a competitor attribute that’s also important.

**All-natural**, and to a lesser degree **contains antioxidants** and **non-GMO**, are important to Prospects, but they don’t align it with Native – so if Native can make these claims, it could be a focus of communications.



# Competitor Performance on Attributes

Many brands are associated with **high protein**, but Native has the opportunity to differentiate itself on **no corn, wheat, soy or meat by products** and **performance dog food**. No competitor owns any key attribute, providing opportunity for Native to take on a good market position.

	Native Customers	Native Prospects	Eukanuba	Acana	Merrick	Nature's Logic	Orijen	Victor	Taste of the Wild	Diamond Naturals	Dr. Tim's	Purina	Blue Buffalo	Pedigree	Iams
Real meat	54%	64%	55%	60%	51%	66%	57%	61%	46%	59%	64%	45%	53%	56%	52%
High protein	90%	85%	64%	76%	59%	66%	80%	88%	56%	74%	75%	51%	62%	65%	54%
All-natural	38%	51%	49%	47%	49%	53%	46%	49%	48%	44%	25%	42%	38%	50%	46%
Non-GMO	33%	45%	42%	29%	53%	57%	35%	37%	37%	50%	43%	31%	40%	39%	44%
Grain-free recipe	38%	42%	45%	40%	45%	45%	30%	39%	41%	39%	36%	36%	38%	35%	39%
Contains antioxidants	38%	61%	44%	36%	47%	55%	48%	51%	37%	57%	61%	35%	38%	44%	41%
No corn, wheat, soy or meat by-products	64%	67%	45%	53%	43%	51%	54%	63%	43%	46%	54%	42%	45%	52%	44%
Chicken meal and rice formula	62%	69%	62%	60%	47%	55%	63%	59%	48%	57%	61%	55%	60%	67%	57%
Performance dog food	85%	76%	51%	60%	43%	60%	67%	76%	48%	56%	64%	44%	45%	50%	44%
Food supplement to provide optimal nutritional supplementation	51%	58%	35%	44%	51%	53%	46%	57%	31%	48%	39%	38%	45%	39%	50%
Nutrition optimizer	56%	52%	42%	38%	41%	43%	33%	55%	48%	52%	54%	36%	42%	46%	43%
Freeze dried raw	21%	46%	31%	36%	37%	51%	28%	29%	35%	41%	46%	35%	35%	33%	31%
For canine athletes	79%	66%	42%	62%	43%	57%	67%	71%	37%	61%	54%	35%	45%	44%	43%
Exclusive blend of organic macromolecules, trace minerals, antioxidants and chelating agents	51%	48%	35%	38%	43%	45%	41%	49%	33%	50%	50%	31%	44%	39%	43%
High fat	85%	61%	42%	60%	37%	45%	72%	75%	41%	41%	68%	36%	44%	46%	44%

**Top-2 box** on 5-point scale. Competitor brands include Customers and Prospects aware of that brand.

Q44-46. Based on what you know, how well do you feel [fill in brand] performs on each of the following? Sample sizes vary based on awareness of each brand.





***Thank you!***

**Rachel Roscow**

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