



AVOCADOS TRACKING 2019 | GENERAL SAMPLE SEGMENT REPORT

AGENDA

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INTRODUCTION

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BACKGROUND AND OBJECTIVES

Background:

HAB has completed consumer tracking studies with Cooper Roberts Research since the creation of HAB.

HAB has recently focused marketing efforts specifically against five key health pillars (listed under objectives). Given this focus, and the fact that the tracking study was due to be refreshed, the survey was revamped this year. It now utilizes some research tools that were not common when this tracking study was first established.



Objectives:

The primary purpose of this research is to identify and measure the relative importance of various attitudes and behaviors of U.S. shoppers' purchase and usage of fresh Hass avocados and how these attitudes and behaviors correlate to (i) avocado purchase levels, and (ii) five key health pillar segments. The data and insights will be used to help HAB drive consumer demand by better targeting specific health messages to receptive audiences and as a benchmark to evaluate future progress against HAB's marketing goals.

Specifically:

- Purchase driver and barrier rankings: Identify and quantify the relative importance of purchase drivers and barriers across a spectrum of potential influences (retail, taste/usage, key health pillars, and food safety/sustainability/GMO) among total purchasers, total non-purchasers, and in each of the key sub-groups in these three areas:
 - Purchase level sub-groups (S, H, M, L, Non-User)
 - Five key health pillar sub-groups (Weigh Management, Type 2 Diabetes, Heart Health, Healthy Living and Prenatal/Birth-to-24 Months)
 - For Hispanic study – level of acculturation
- Segment valuation: Identify how each purchase level segment breaks out (%) by key health pillar sub-group, and conversely, how each key health pillar sub-group breaks out (%) by purchase level segment
- Usage dynamics: Identify and quantify usage dynamics: e.g. who is consuming, on which meal/other occasions, how consumed, etc.

WHAT WE DID

Who:

- 33% Male & 67% Female split
- Age 18+ (change from 25+ in recent years)
- Continental U.S. resident
- Must at least share in grocery shopping responsibility
- Must be aware of avocados (94% were)

Notes:

- Due to significant changes this year, only limited measures are trended
- This report explores avocado purchaser segments. Additional reports will be created to explore health and wellness pillars and Hispanic acculturation levels among a Hispanic sample.
- Purchaser groups used in this report defined according to calculated annual household volume consumption as follows:
 - Light: Purchase at least one but less than 12 avocados per year
 - Medium: Purchase 12 – 36 avocados per year
 - Heavy: Purchase 37 – 120 avocados per year
 - Super Heavy: Purchase more than 120 avocados per year

How Many and When:

2,400 surveys completed per wave

2018: July 6th – 17th, 2018
2019: May 8th – 22nd, 2019

How:

Self-administered web based survey with respondents recruited from an online research panel

Report Notes

Statistical differences between key groups, at a 95% Confidence Level, are indicated by an upper case letter. Directional differences, at an 80% Confidence Level, are denoted by a lower case letter.

Some charts/tables may not add to 100% due to rounding, exclusion of don't know/refused answers or multiple mentions.

EXECUTIVE SUMMARY

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WHAT'S NEW IN 2019

While most results are similar to 2018, there were some changes:

- Using avocados for parties/special events is down significantly from 25% to 19% - driven by all segments except heavy purchasers.
- The net change in claimed usage (using more/less) among light users is down for every meal occasion.
- “Fits into my/my family member’s heart-healthy diet” and “fits into my/my family member’s weight-loss diet” are both down as purchase drivers (but still relatively important). Avocado delivery is also down on these measures among all segments except super purchasers. These statements were changed this year to include family members, but we would be surprised if this caused the change.
- Frequently too expensive is still a top barrier for light purchasers, but less so than seen last year.
- There is a small, but significant increase in awareness of “Love One Today” – driven by non-purchasers and super heavy purchasers.
- There is a small, but significant decrease in the recall of the message “eating avocados is associated with a healthier diet and lower body weight” – driven by super heavy purchasers.

EXECUTIVE SUMMARY

Purchaser Segments

- The proportion of avocado purchasers, and specifically heavy and super heavy purchasers has increased over the years.
- Non-purchasers and light purchasers are fairly similar demographically. They tend to skew older, away from the west coast, are in smaller households and less likely to have children, more likely to be single and have lower household incomes.
- Medium to super heavy purchasers skew more toward the “nesting” life stage, meaning they likely prepare more meals at home, giving them more opportunities to use avocados at home.
 - Other variables such as geographic location, Hispanic origin, larger households and higher levels of education and household income are correlated with increased avocado purchases.
 - Health living is strongly associated with increased avocado purchases. There is also strong association with most of the other health pillars.

EXECUTIVE SUMMARY (CONT.)

Avocado Usage

- Dinner remains the most common meal occasion for using avocados, but lunch is in a strong second place.
 - As avocado purchase levels go up, the number of meal occasions where they are used goes up. For example, only 8% of light purchasers ever use avocados for breakfast, compared to 49% of super heavy purchasers.
 - The use of avocados for parties/special events is down significantly from 25% to 18% - driven by all purchaser segments except heavy purchasers.
 - There are generally positive changes in claimed frequency of using avocados for the different meal occasions except among light purchasers, where there has been a net decrease in claimed usage frequency for dinner, lunch, parties/special events and snacks.
- The usage of avocados by other household members is generally correlated with the presence of these household members. While only 2% of all respondents claim newborns to 24 months eat avocados, this jumps to 37% among households with a newborn to toddler in their home.
- Guacamole/dips is the most common form of avocado usage, followed by salads and sandwiches/wraps/burgers. As avocado purchase levels increase, so does the variety of ways in which avocados are used.

EXECUTIVE SUMMARY (CONT.)

Purchase Drivers

- The top two reasons for purchasing avocados continue to be believing they are healthy and knowing they contain “good” fats. Liking the taste and texture are strong secondary drivers.
 - Non-purchasers do not have strong agreement with any of the reasons for purchasing avocados, although believing they are healthy is the top potential reason for this group.
 - As avocado purchase levels increase, agreement with the different reasons for purchasing avocados increases.
- When deciding which fresh fruits and vegetables should be purchased, having a lot of vitamins and minerals and being a source of many important nutrients continue to dominate. This is true for all purchaser segments.
 - Healthy aging, naturally good fats, helping maintain cholesterol levels, helping with nutrient and antioxidant absorption, beneficial fiber, heart health, digestive health, low in saturated fats, not raising “bad” LDL cholesterol levels, managing blood pressure, weight maintenance, gut health, cholesterol free and improved eyesight are also very important.
 - As avocado purchase levels increase, so does the number of very important attributes.

EXECUTIVE SUMMARY (CONT.)

Avocado Delivery Against Fresh Fruit & Vegetable Purchase Drivers

- Avocados have reasonably strong delivery overall against many, but not all of the most important attributes when deciding which fresh fruit and vegetables to buy.
 - The best performance for avocados are for being a source of naturally good fats, having a lot of vitamins and minerals, and being a source of many important nutrients.
 - Avocados fall somewhat short on the high importance attributes of helping to manage blood pressure, improving gut health and improving eyesight.
 - Perceptions of avocados against these purchase drivers varies by user segment:
 - Avocados fall below minimally acceptable norms among non-purchasers for all attributes.
 - Scores are better among light purchasers, but avocados do fall short for helping to maintain blood pressure and improving gut health.
 - Improving eyesight is the only shortfall for avocados among medium purchasers, and this score is just at minimally acceptable levels among heavy purchasers.
 - Avocados score extremely well among super heavy purchasers across all of the high importance attributes.

EXECUTIVE SUMMARY (CONT.)

Barriers to Avocado Purchase

- Frequently being too expensive is the top barrier overall to purchasing avocados. Turning brown too quickly when partially used is a strong secondary barrier. Being perishable, inconsistent quality, undesirable ripeness levels, not liking the taste, and feeling that other fruits and vegetables are better for you are also strong barriers.
- Barriers differ by user segment:
 - Not liking the taste of avocados is the number one barrier for non-purchasers. Other strong barriers for this group are family members not liking them, feeling other fruits and vegetables are better for you and not liking the texture.
 - Turning brown too quickly and frequently being too expensive are the top barriers for light purchasers. However, being too expensive has decreased somewhat as a barrier.
 - Frequently being too expensive is the top barrier for both medium and heavy purchasers. Turning brown too quickly when partially used is a strong secondary barrier for these segments.
 - As would be expected, super heavy purchasers have less barriers to purchasing avocados. While not as strong as seen for the other user groups, the top concerns for them are the same issues of being too expensive and turning brown too quickly.

EXECUTIVE SUMMARY (CONT.)

Communication

- 18% of all respondents claim to have seen “Love One Today” within the past year. This is a small, but significant increase from the 16% seen last year.
 - This ranges from a low of 7% among non-purchasers to a high of 43% among super heavy purchasers.
 - Message communication associated with the logo has stayed fairly consistent over time. The one exception is a decrease for “you should eat an avocado everyday”.
 - Messages communicated generally increase as avocado purchase levels increase.
- When it comes to the media, messages about heart health and naturally good fats are most commonly recalled about avocados.
- The news media and family and friends are the top sources of health and nutrition information.

PURCHASER SEGMENT SNAPSHOTS

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NON-PURCHASERS: 36% OF GENERAL SAMPLE

- They do not see any strong reasons to purchase avocados. Top reasons are perceptions of being healthy and containing “good” fats. However, they fall below typically acceptable scores.
- They appear to be less health and wellness engaged. Scores for the importance of various attributes when purchasing fresh fruits & vegetables are well below scores seen for purchasers.
 - Likewise, health and nutrition related scores for avocados are generally low for this group.
- The top barrier to purchasing avocados is not liking the taste. Other strong barriers are family members not liking them, feeling other fruits & vegetables are better for them, and not liking the texture.
- 22% of them (same as last year) do order dishes with avocados away from home. It appears that some of these individuals could be converted to purchasers. However, taste remains a strong barrier for this group (but not nearly as strong as seen among total non-purchasers). We hypothesize that the taste may be camouflaged in dishes ordered away from home.
- Along with light purchasers, non-purchasers skew older, are least likely to have children at home, have smaller households, and are least likely to be employed. They are somewhat less educated and have the lowest household income. Geographically, they skew away from the west.
- They are the least likely segment to seek health and nutrition information.

LIGHT PURCHASERS: 8% OF GENERAL SAMPLE

- Their use of avocados across meal occasions falls below other segments. In particular, very few of them use avocados at breakfast. Their net claimed usage of avocados is down across most meal occasions.
- They are less committal than seen overall in terms of reasons for purchasing avocados. In fact, only two reasons fall above typically acceptable minimums: being healthy and contain “good” fats. Like the taste slipped just below minimal standards.
- While they generally agree that many of the health and nutrition attributes are important, they are not as passionate about it as seen among the higher purchaser segments.
 - Avocados generally perform well against the most important attributes for this segment, but again, not as well as seen among the higher purchaser segments.
- Top barriers to avocado purchases among light purchasers are being too expensive, turning brown too quickly, being perishable, inconsistent quality and not being at the desired ripeness level.
- Along with non-purchasers, light purchasers skew older, are least likely to have children at home, have smaller households, and are least likely to be employed. They have the second lowest household income. Geographically, they skew away from the west.
- They are the second least likely segment to seek health and nutrition information.

MEDIUM PURCHASERS: 15% OF GENERAL SAMPLE

- Their use of avocados across meal occasions mostly falls below the heavy and super heavy segments. They are more adventurous than light purchasers, but fall well below heavy and super heavy purchasers in terms of the different ways they use avocados.
- They are less committal than seen overall in terms of reasons for purchasing avocados, but they do have more reasons than seen among light purchasers.
- While they generally agree that many of the health and nutrition attributes are important, they are not as passionate about it as seen among heavy and super heavy purchasers.
 - Avocados generally perform well against the most important attributes for this segment, but again, not as well as seen among the heavy and super heavy purchasers.
- Top barriers to avocado purchases among medium purchasers are being too expensive, turning brown too quickly, being perishable, inconsistent quality and not being at the desired ripeness level.
- Medium purchasers are fairly average in terms of their age, household size, employment status, education, household income and geographic distribution. They skew somewhat low for having children in the household.
- Almost three-quarters (down slightly from last year) of medium purchasers seek health and nutrition information.

HEAVY PURCHASERS: 22% OF GENERAL SAMPLE

- They use avocados for more meal occasions than average, but generally fall below super heavy purchasers. They are more adventurous than light and medium purchasers, but fall well below super heavy purchasers in terms of the different ways they use avocados.
- They feel strongly about many of the reasons for purchasing avocados, but they are not as passionate as super heavy purchasers.
- They generally agree that many of the health and nutrition attributes are important, but they are not as passionate about it as seen among super heavy purchasers.
 - Avocados generally perform well against the most important attributes for this segment, but again, not as well as seen among super heavy purchasers.
- Top barriers to purchasing avocados are being too expensive, turning brown too quickly, being perishable, inconsistent quality and not being at the desired ripeness level.
- Heavy purchasers have a strong skew toward ages 25-44, but not as strong as seen among super heavy purchasers. Along with super heavy purchasers, they have a Hispanic skew. Their households are larger than light and medium purchasers but somewhat smaller than super heavy purchasers. They are the second most likely segment to have children in the home and they are tied with medium purchasers for the second largest household income. Along with super heavy users, they have a geographic skew to the west.
- Three-quarters of heavy purchasers seek health and nutrition information.

SUPER HEAVY PURCHASERS: 19% OF GENERAL SAMPLE

- They use avocados for more meal occasions than seen across all other segments. Of particular notice, half of them use avocados for breakfast. They use avocados in more ways than seen for all other segments. Many of them have moved beyond guacamole, salads, and sandwiches.
- They feel very strongly about all of the reasons for purchasing avocados.
- They are more passionate about the importance of various health and nutrition attributes than seen for all other segments.
 - Avocados generally perform well against all of the most important attributes for this segment.
- Top barriers to purchasing avocados are being too expensive and turning brown too quickly.
- Super heavy purchasers continue to be the only segment with a male skew. They have a strong skew toward ages 25-44. Along with heavy purchasers, they have a Hispanic skew. They are the most racially diverse segment. They have the largest households of all segments and are the most likely to have children in the home. They are the most likely segment to be employed full-time, they are the most educated and they have the highest household income. Along with heavy users, they have a geographic skew to the west.
- Almost nine in ten of super heavy purchasers seek health and nutrition information.

AVOCADO PURCHASER SEGMENTS

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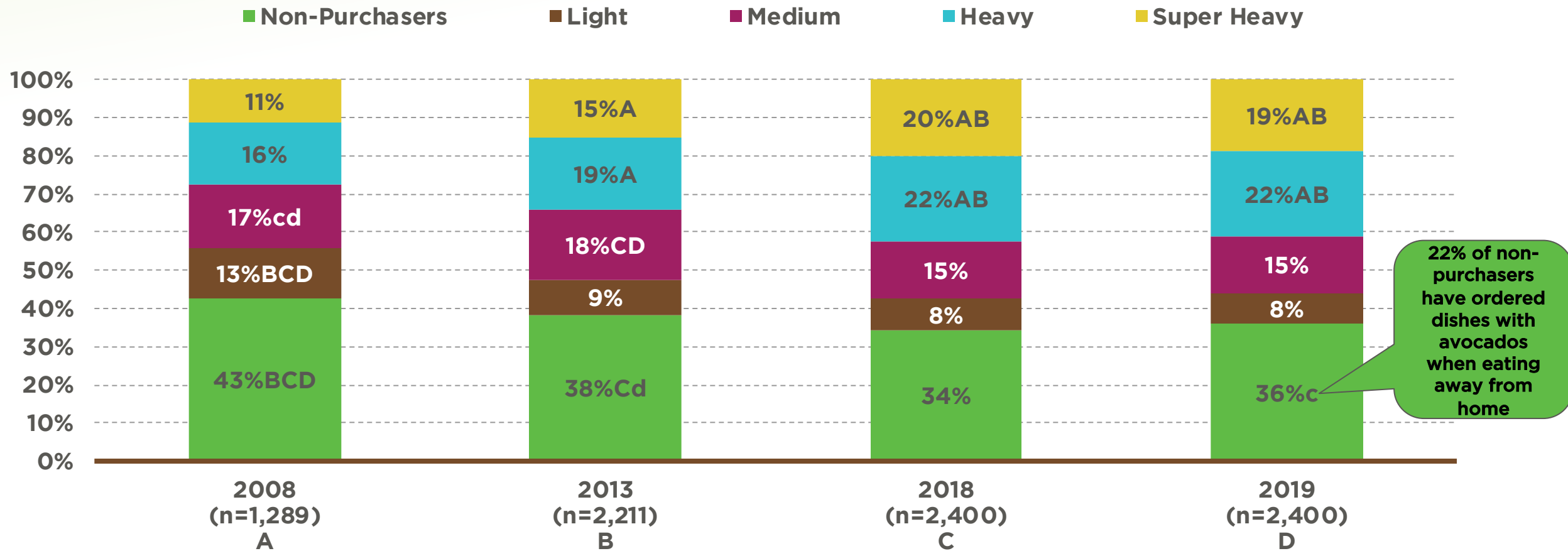
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AVOCADO SEGMENT COMPOSITION

THE PROPORTION OF AVOCADO PURCHASERS, AND SPECIFICALLY HEAVY AND SUPER HEAVY PURCHASERS HAS INCREASED OVER THE YEARS.

22% OF NON-PURCHASERS HAVE ORDERED DISHES WITH AVOCADOS AWAY FROM HOME - INDICATING THE POTENTIAL TO CONVERT THEM TO PURCHASERS FOR USE AT HOME.

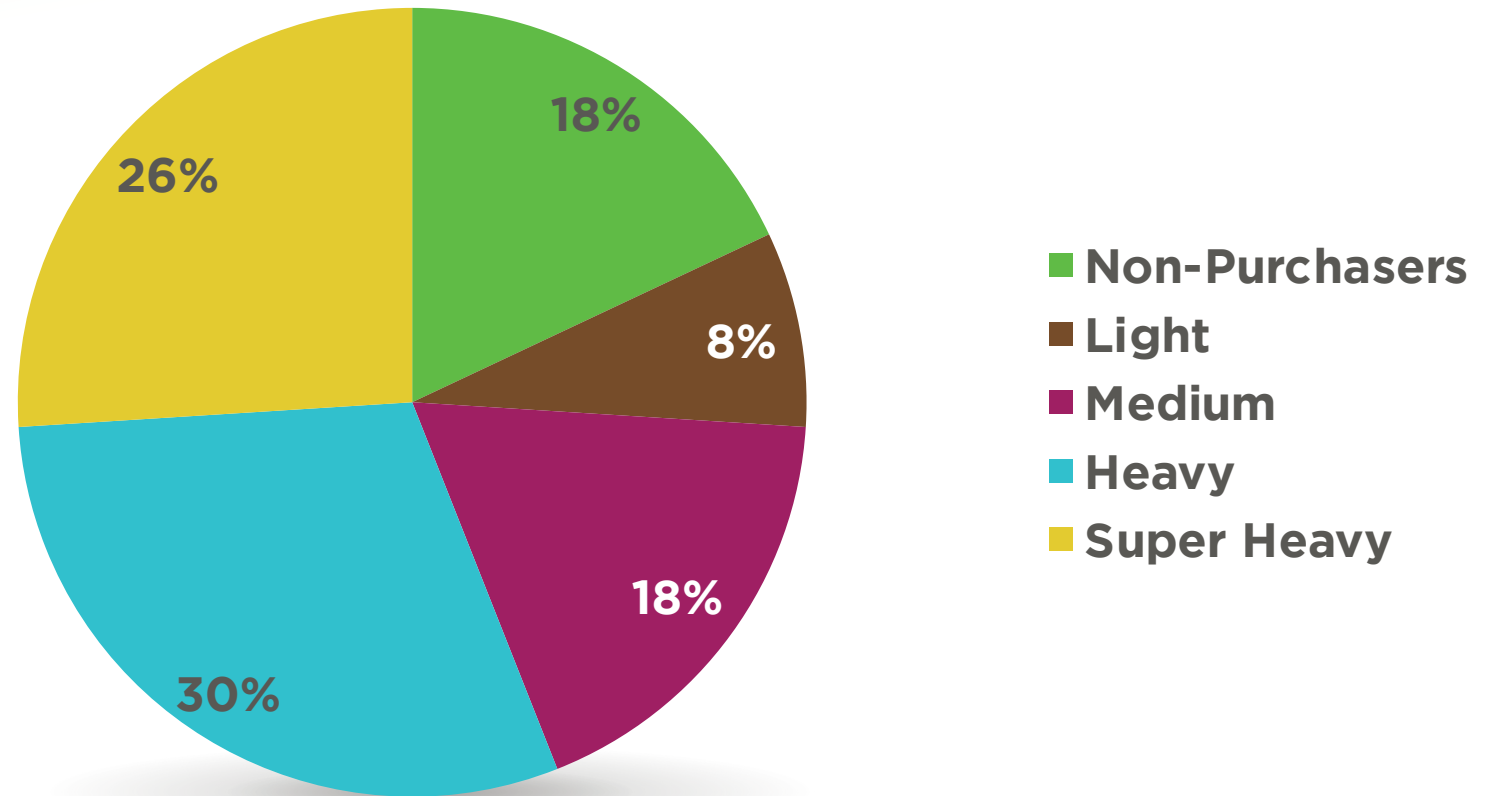


Q120 - Over the course of a year, how often do you buy avocados to eat or serve at home?
 Q130 - On average, how many avocados do you usually buy at one time?

NOTE: reported in 5 year increments for ease in reading the chart

AVOCADO SEGMENT COMPOSITION AMONG THOSE WHO ORDER DISHES WITH AVOCADO AWAY FROM HOME

THERE IS STRONG CORRELATION WITH ORDERING DISHES WITH AVOCADOS AWAY FROM HOME AND BEING A HEAVY OR SUPER PURCHASER.

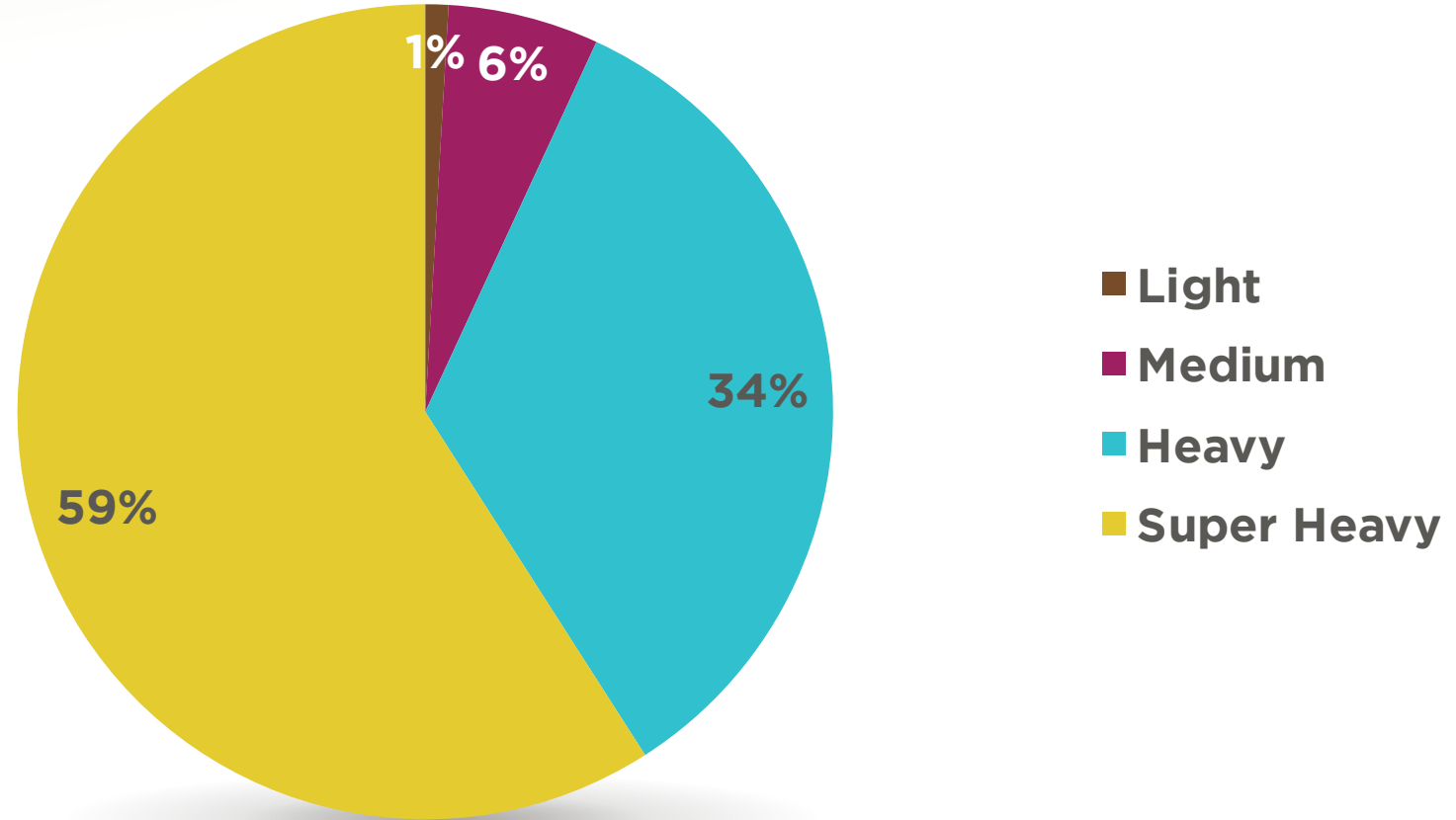


Q120 - Over the course of a year, how often do you buy avocados to eat or serve at home?

Q130 - On average, how many avocados do you usually buy at one time?

SEGMENT SHARE OF VOLUME

WHILE HEAVY AND SUPER HEAVY PURCHASERS ACCOUNT FOR 41% OF THE POPULATION, THEY ACCOUNT FOR 93% OF TOTAL AVOCADO VOLUME (SIMILAR TO LAST YEAR).



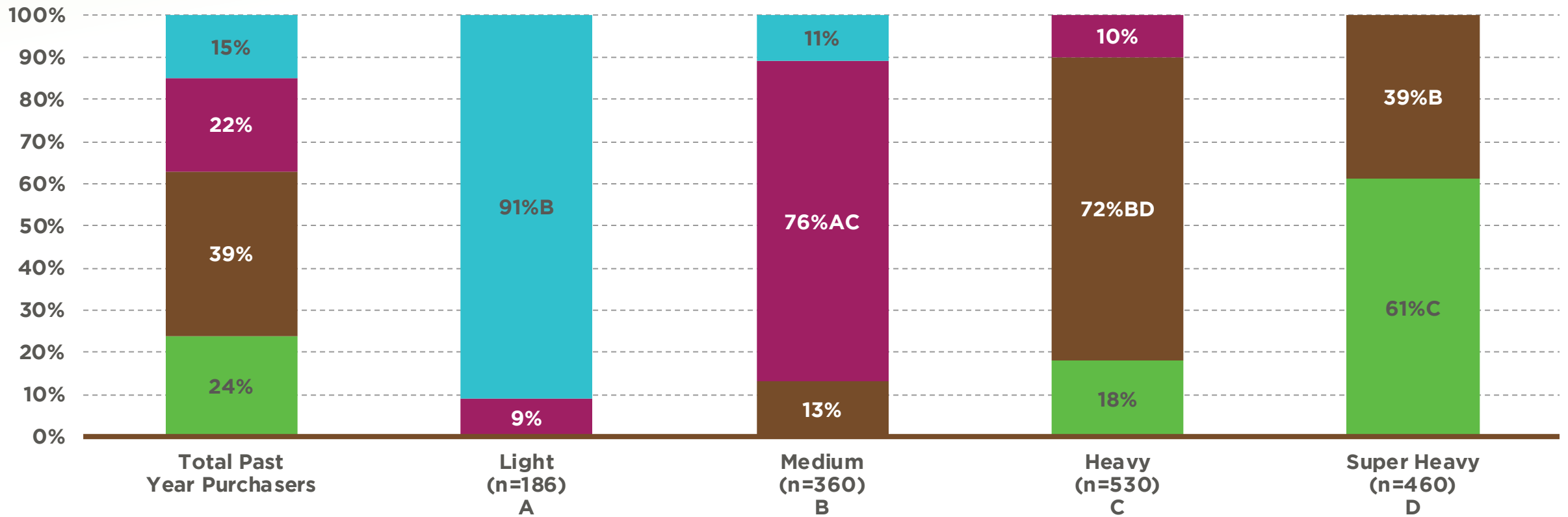
Q120 - Over the course of a year, how often do you buy avocados to eat or serve at home?

Q130 - On average, how many avocados do you usually buy at one time?

FREQUENCY OF BUYING AVOCADOS TO EAT OR SERVE AT HOME

THERE IS STRONG CORRELATION WITH TOTAL AVOCADO PURCHASES AND FREQUENCY OF PURCHASING. FOR EXAMPLE, JUST LIKE LAST YEAR, 61% OF SUPER HEAVY PURCHASERS BUY AVOCADOS EVERY WEEK OR MORE OFTEN.

■ Once a week or more often
 ■ Twice to several times a month
 ■ Every month or two
 ■ Once every three months or less



Q120 - Over the course of a year, how often do you buy avocados to eat or serve at home?

PROFILE OF PURCHASER SEGMENTS

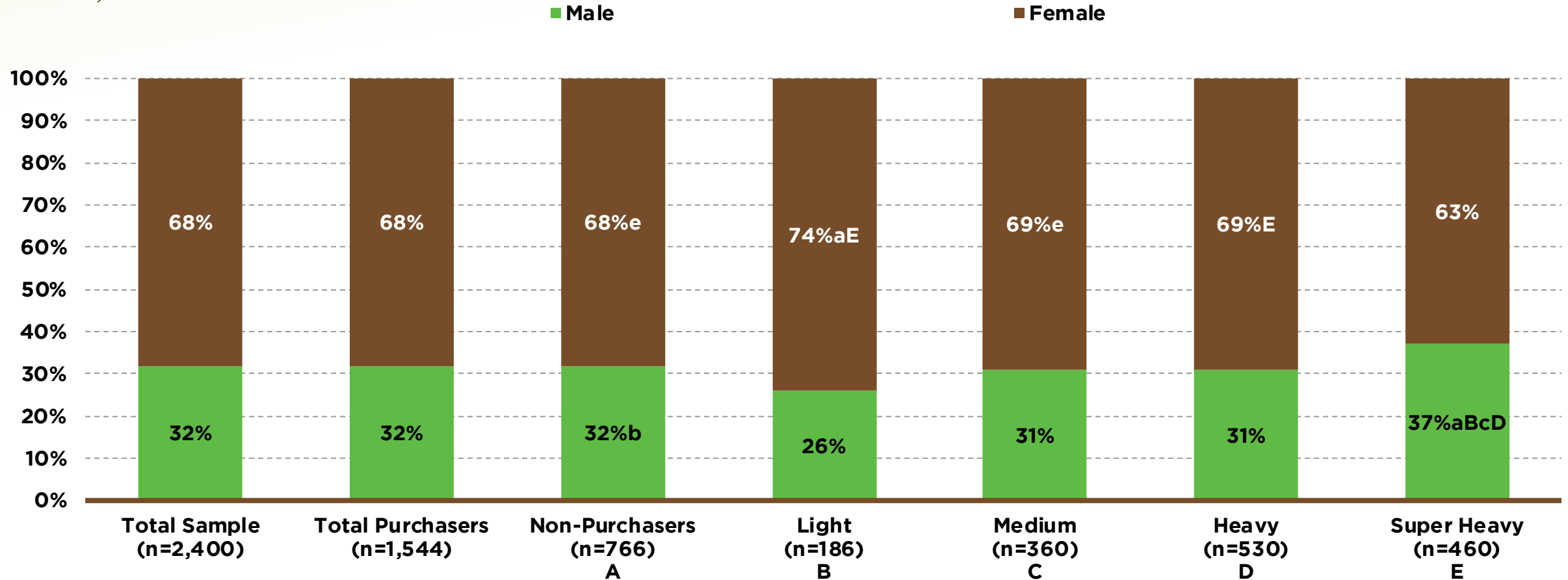
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GENDER

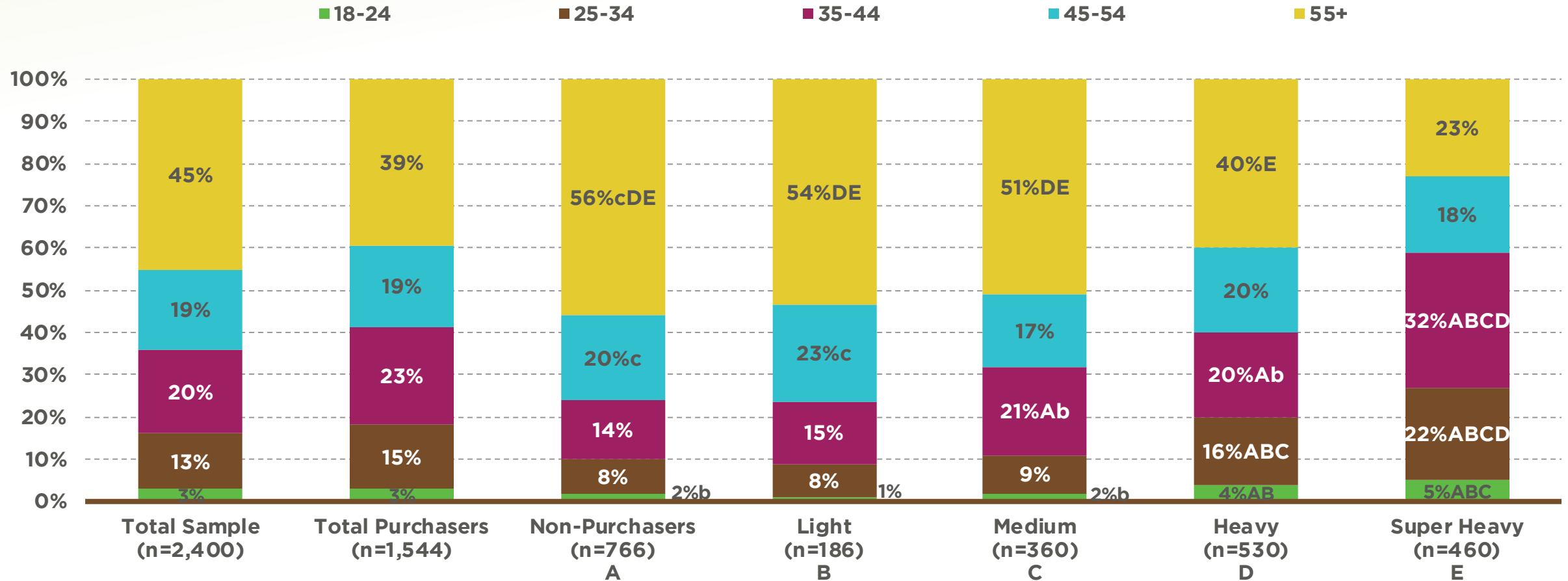
AS SEEN BEFORE, SUPER HEAVY PURCHASERS SKEW MORE MALE THAN SEEN ACROSS THE OTHER SEGMENTS. HOWEVER, THIS IS DOWN SLIGHTLY FROM LAST YEAR (41% OF SUPER PURCHASERS WERE MALE)



S1 - Are you male or female?

AGE

THERE IS QUITE A BIT OF VARIATION IN THE AGE DISTRIBUTION ACROSS USER SEGMENTS. AS USAGE GOES UP, THE PROPORTION OF PURCHASERS AGE 25-44 INCREASES.

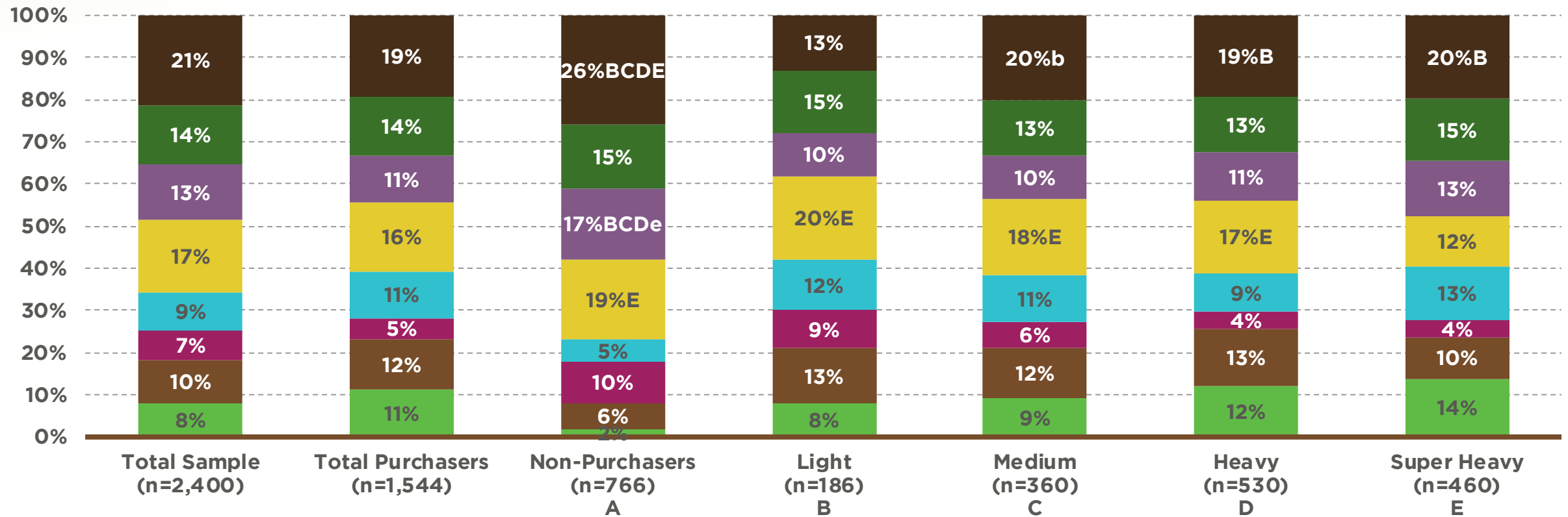


S2 - Please indicate into which of the following age ranges you fall?

REGION OF RESIDENCE

AS SEEN IN THE PAST, THERE IS A WESTERN SKEW, ESPECIALLY TO CALIFORNIA, AS AVOCADO USAGE INCREASES.

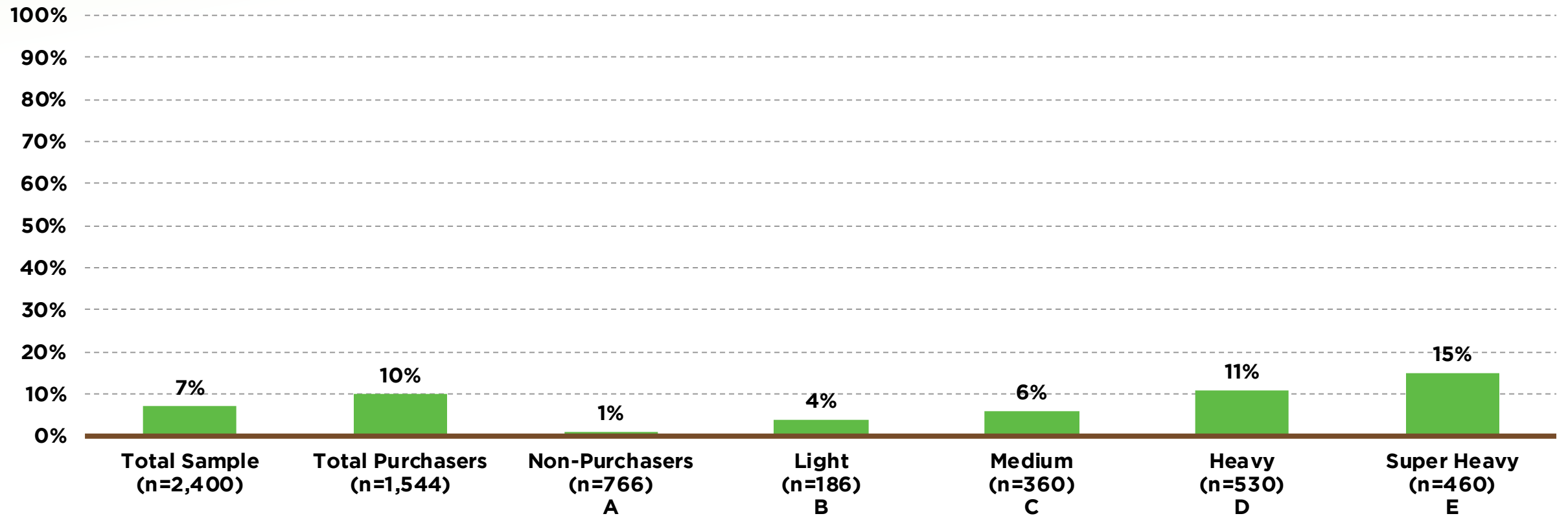
■ California
 ■ West
 ■ Plains
 ■ South Central
 ■ Great Lakes
 ■ Mid South
 ■ Southeast
 ■ Northeast



S3 - In what state do you currently reside?

OF HISPANIC ORIGIN (GENERAL SURVEY IN ENGLISH ONLY)

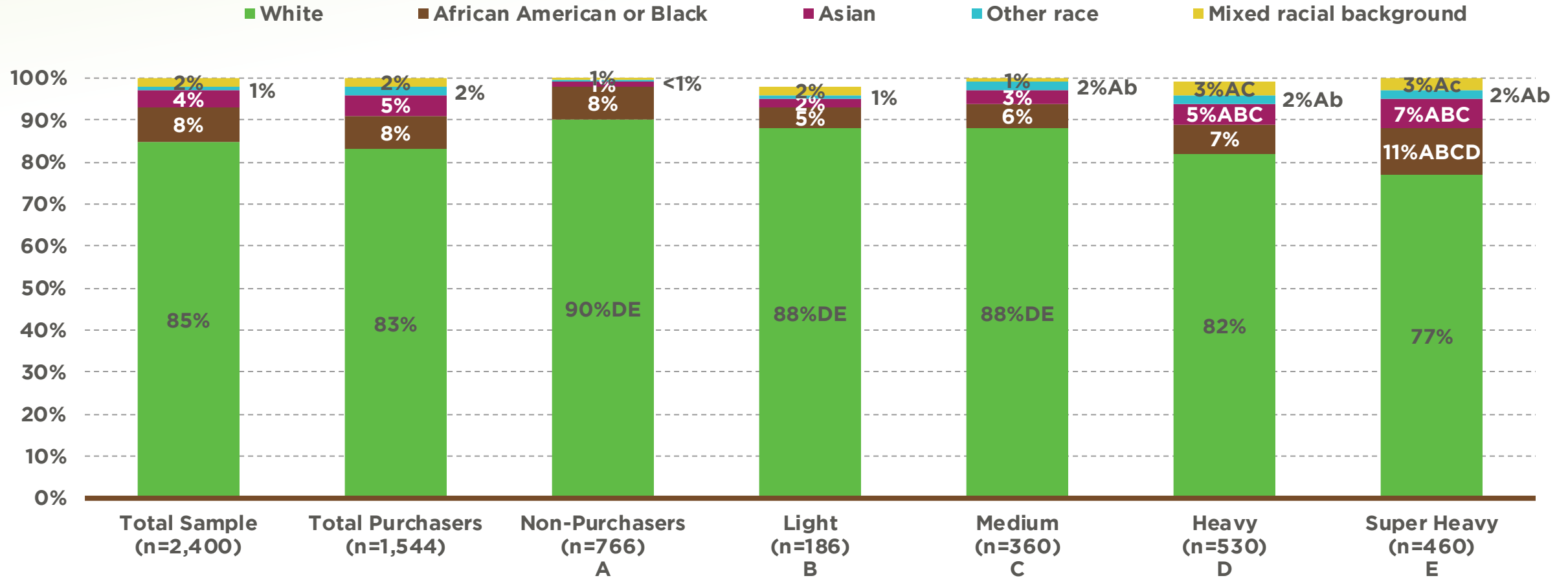
AS SEEN BEFORE, HEAVY AND SUPER HEAVY PURCHASERS SKEW MORE HISPANIC.



S5 - Are you of Hispanic origin, such as Latin American, Mexican, Puerto Rican, or Cuban?

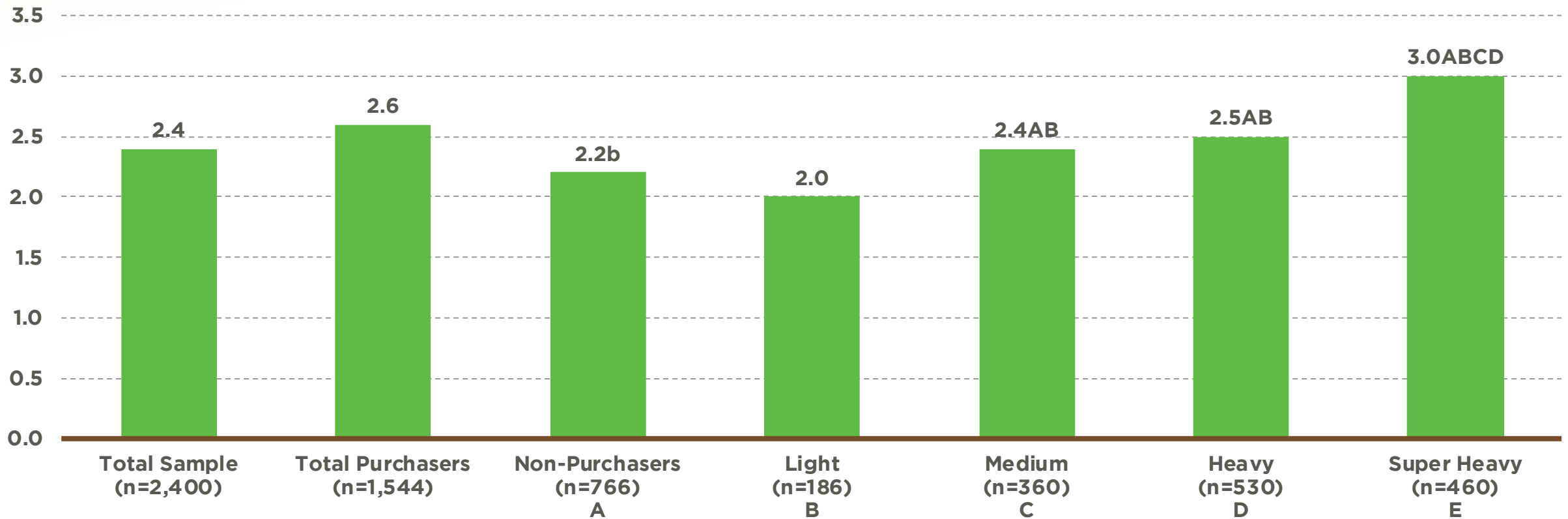
RACE

AS AVOCADO USAGE INCREASES TO HEAVY OR SUPER HEAVY, THE RACIAL DIVERSITY OF THE SEGMENTS ALSO INCREASES. NON-USERS HAVE SOMEWHAT OF AN AFRICAN-AMERICAN SKEW.



AVERAGE NUMBER OF PEOPLE IN HOUSEHOLD

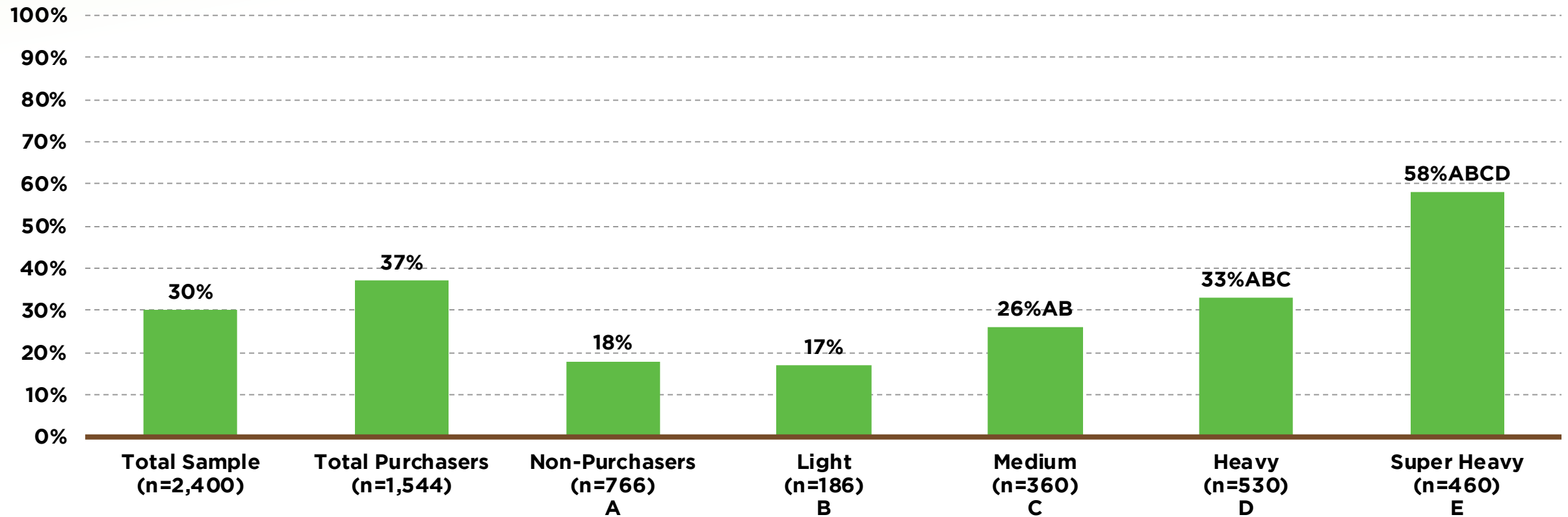
HOUSEHOLD SIZE INCREASES AS AVOCADO CONSUMPTION INCREASES



D1 - How many persons, including yourself, are currently living in your household?

CHILDREN UNDER 18 LIVING IN HOUSEHOLD

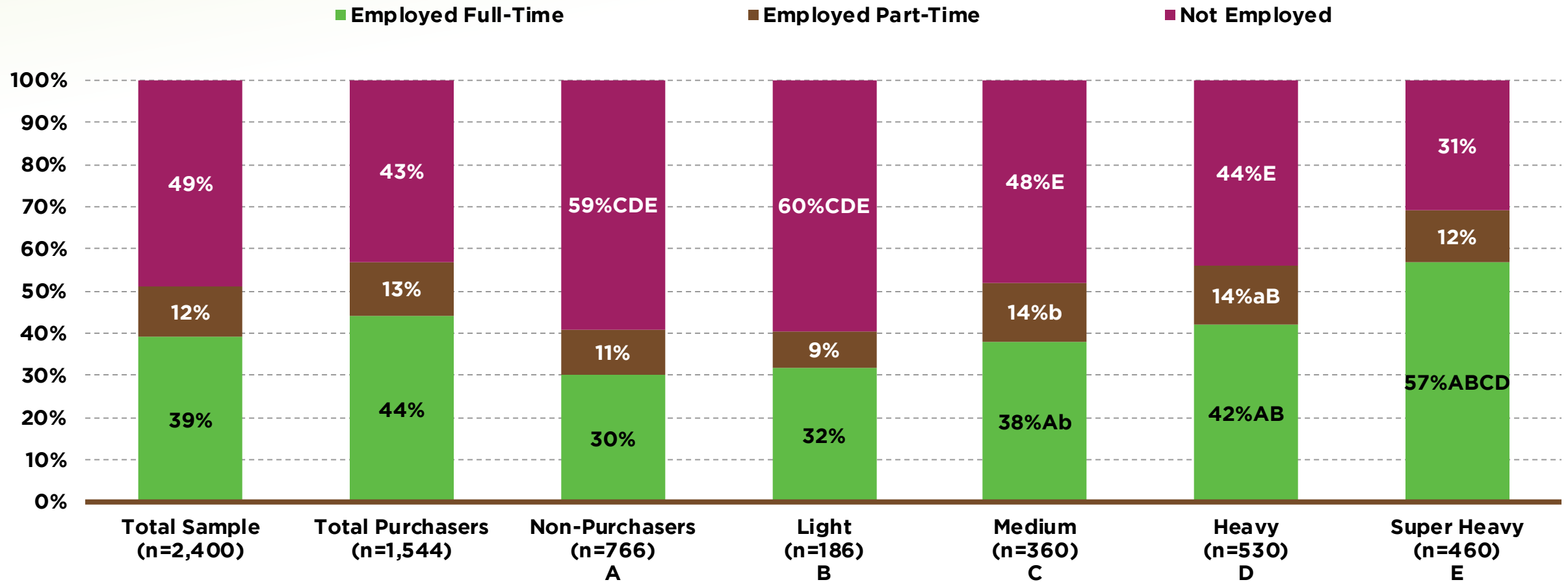
THE PRESENCE OF CHILDREN IN THE HOUSEHOLD INCREASES AS AVOCADO USAGE INCREASES.



D3 - Do you have children in any of the following age groups currently living in your household?

EMPLOYMENT STATUS

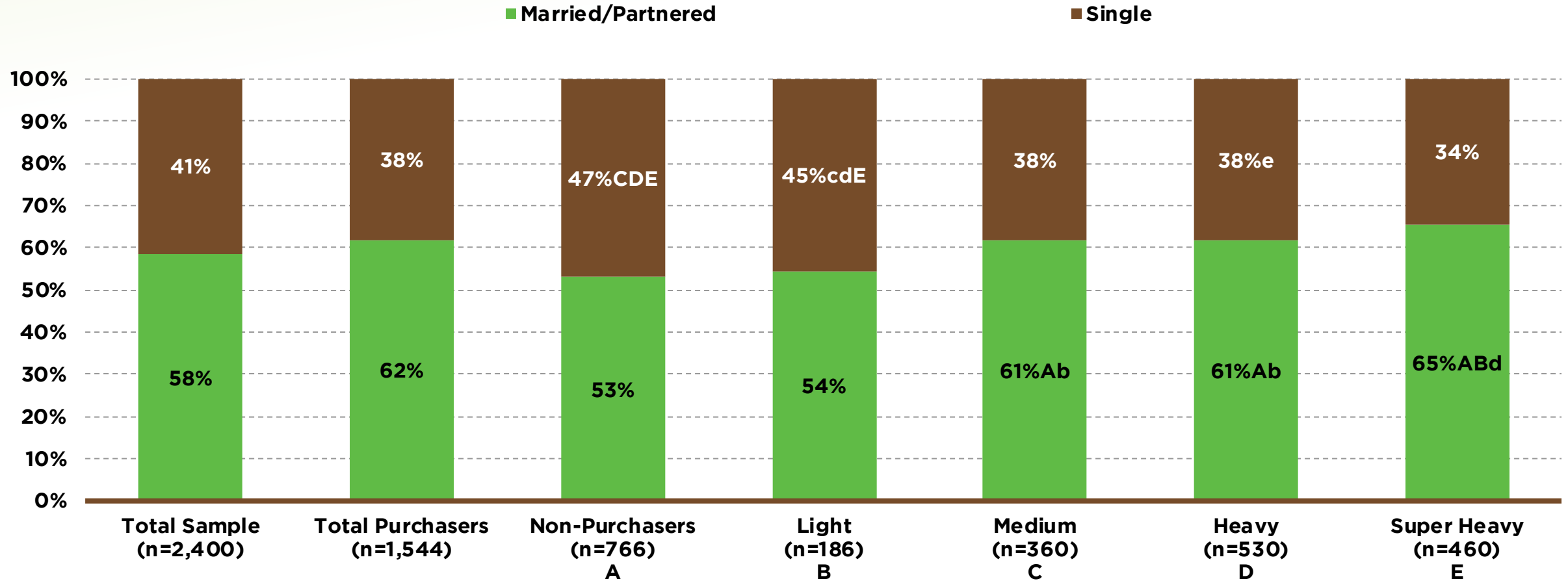
THE LIKELIHOOD OF BEING EMPLOYED INCREASES AS AVOCADO USAGE INCREASES.



D4 - Please indicate your employment status?

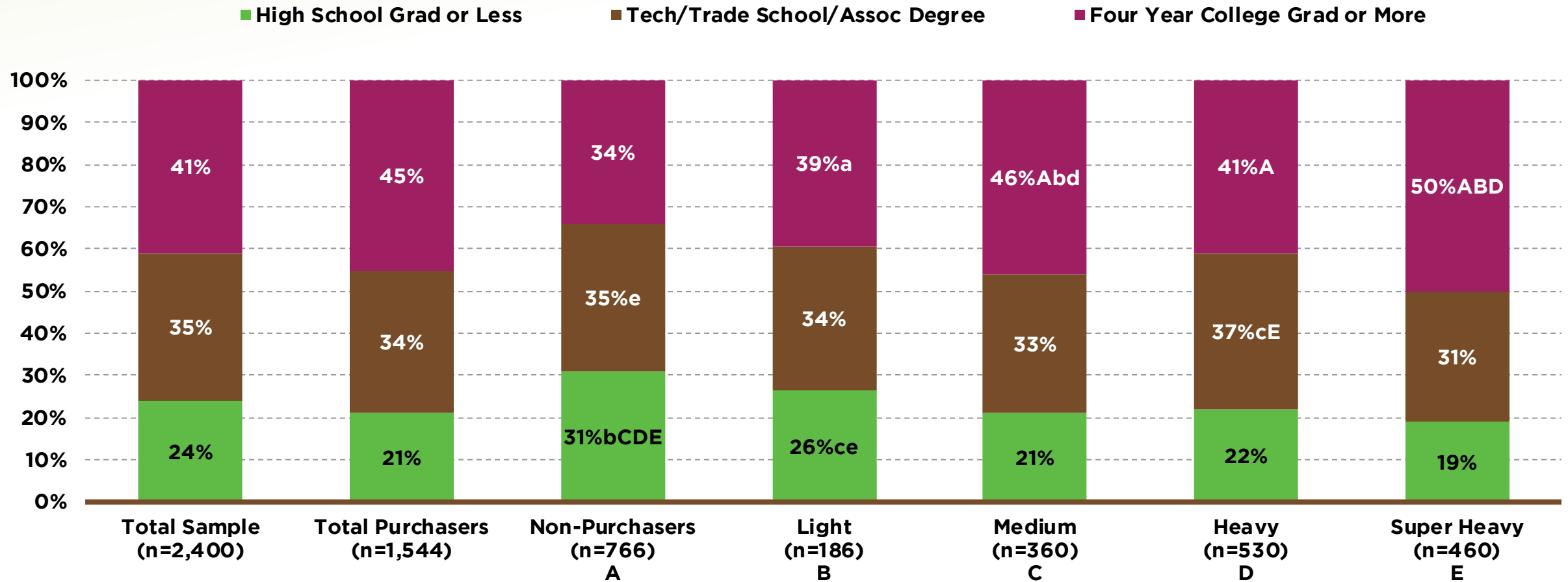
MARITAL STATUS

THE LIKELIHOOD OF BEING MARRIED/PARTNERED INCREASES AS AVOCADO USAGE INCREASES.



EDUCATION LEVEL

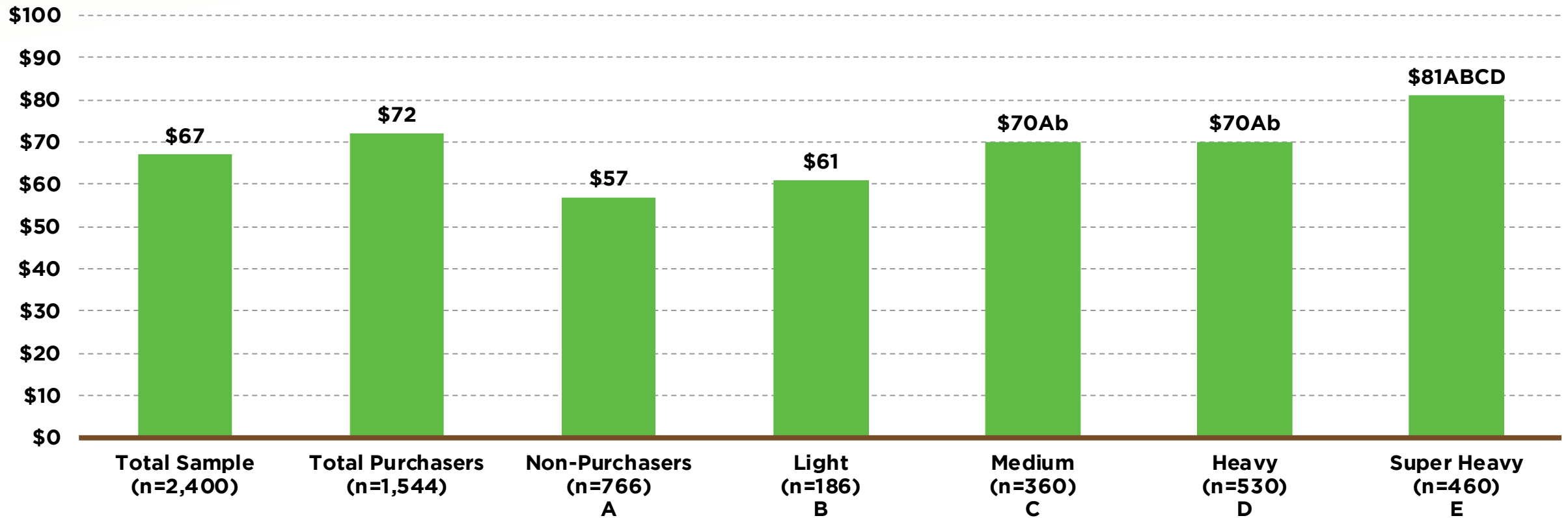
EDUCATIONAL LEVEL INCREASES AS AVOCADO USAGE INCREASES.



D6 - What is the highest level of education you have completed or the highest degree you have received?

TOTAL AVERAGE ANNUAL HOUSEHOLD INCOME (IN 000'S)

HOUSEHOLD INCOME INCREASES AS AVOCADO USAGE INCREASES.

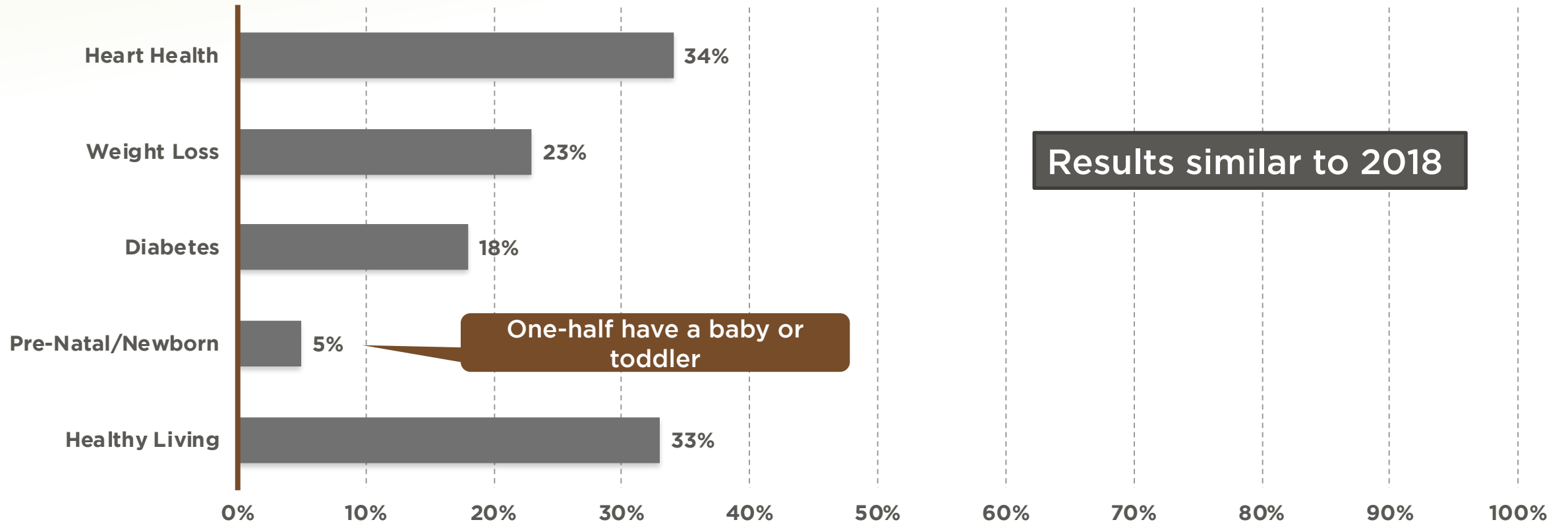


D7 - Which of the following income categories best describes your total [INSERT LAST YEAR] household income before taxes?

HEALTH AND WELLNESS PILLARS (TOTAL SAMPLE)

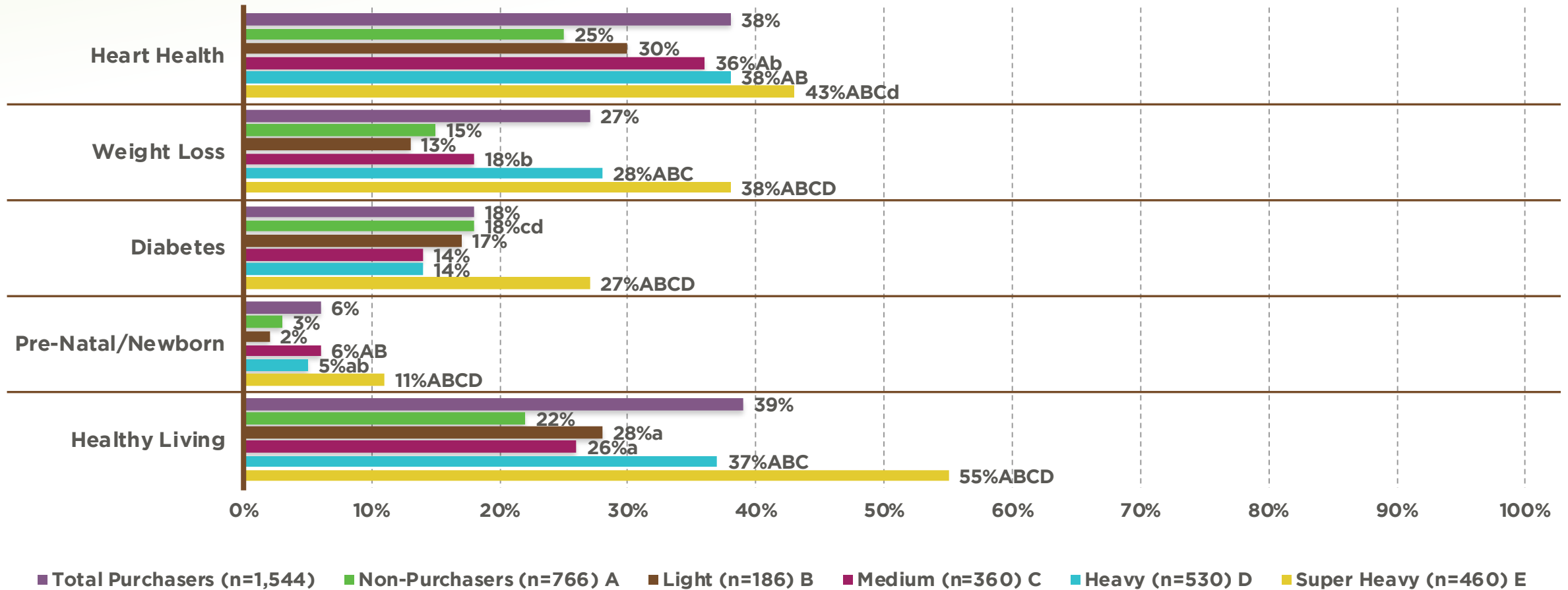
Full details for the Health & Wellness pillars are in a separate report

THIS CHART SHOWS THE PROPORTION OF THE TOTAL SAMPLE THAT FALLS INTO EACH HEALTH AND WELLNESS PILLAR. NOTE THAT SOME PEOPLE FALL INTO MORE THAN ONE PILLAR.



HEALTH AND WELLNESS PILLARS

THERE IS STRONG CORRELATION BETWEEN THE AVOCADO USER SEGMENTS AND EACH OF THE HEALTH PILLARS.



AVOCADO USAGE

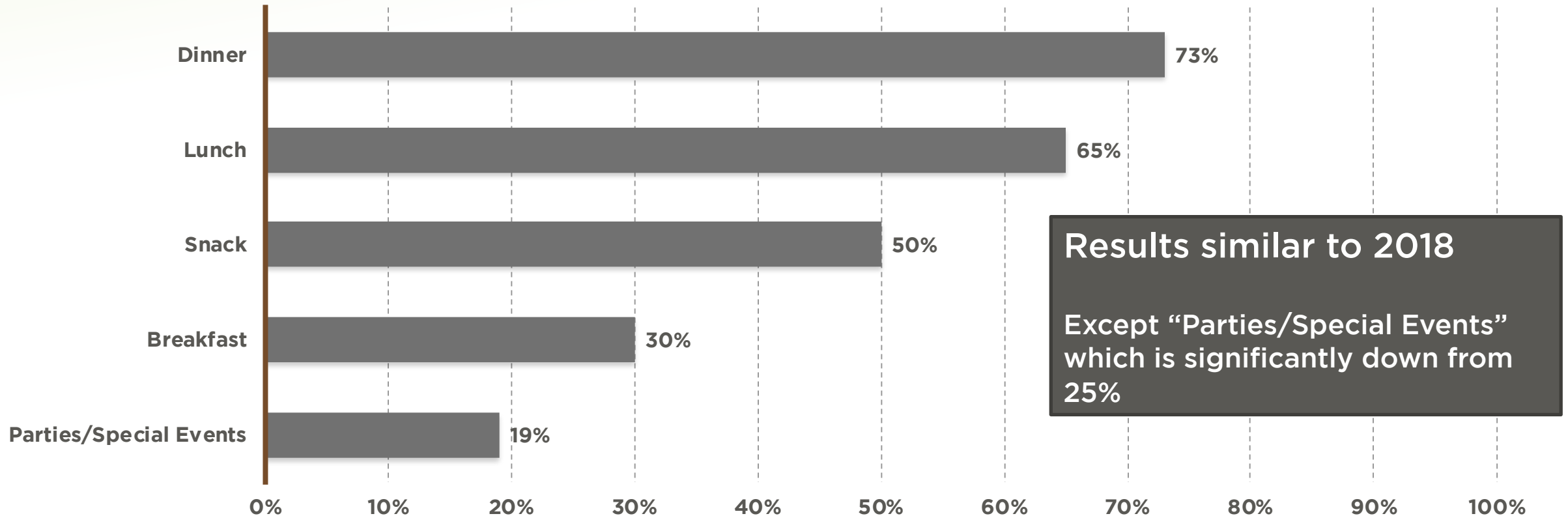
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MEAL OCCASIONS HOUSEHOLD TYPICALLY USE AVOCADOS (TOTAL PAST YEAR AVOCADO PURCHASERS)

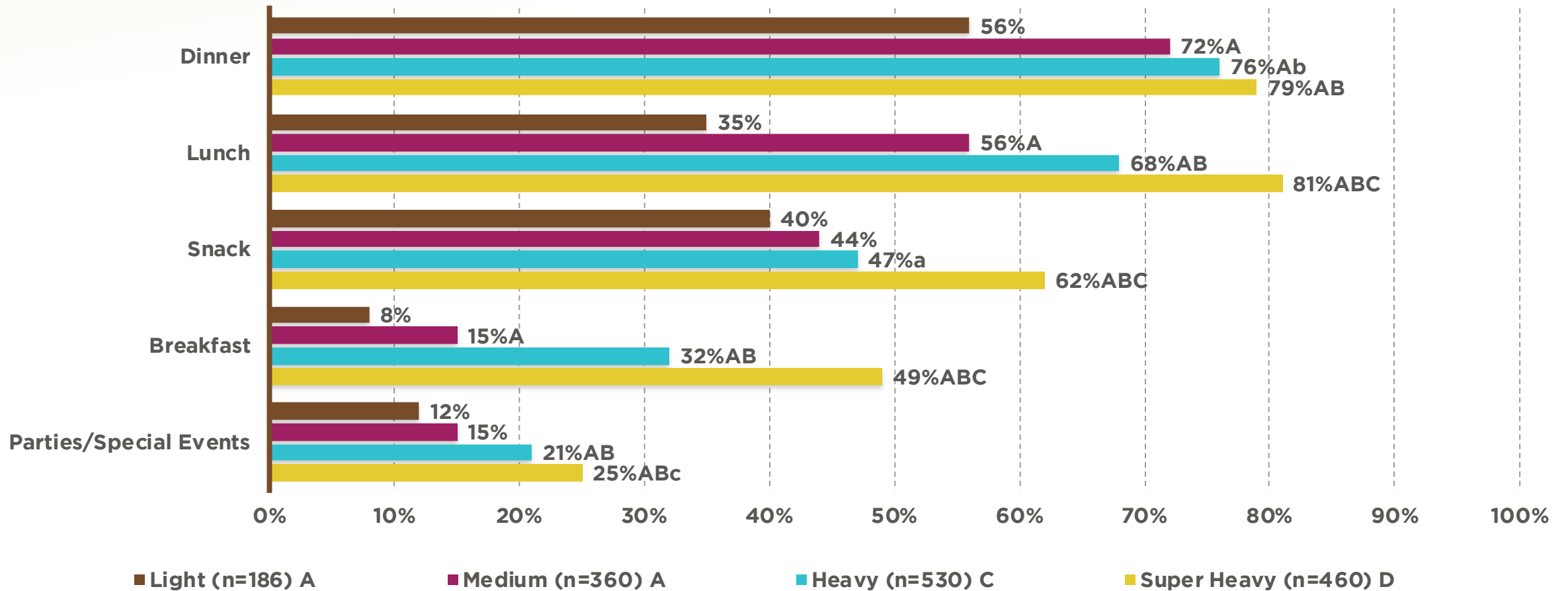
WHILE AVOCADOS ARE USED ACROSS A VARIETY OF MEAL OCCASIONS, DINNER AND LUNCH ARE MOST COMMON.



Q140 - For which meal occasions at home do you or others in your household typically use avocados?

MEAL OCCASIONS HOUSEHOLD TYPICALLY USE AVOCADOS

SUPER HEAVY PURCHASERS EXCEED ALL OTHER SEGMENTS IN TERMS OF USING AVOCADOS ACROSS THE VARIOUS MEAL OCCASIONS (EXCEPT DINNER WHERE THEY ARE TIED WITH HEAVY PURCHASERS). THIS IS MOSTLY TRUE FOR HEAVY PURCHASERS EXCEPT AS A SNACK.

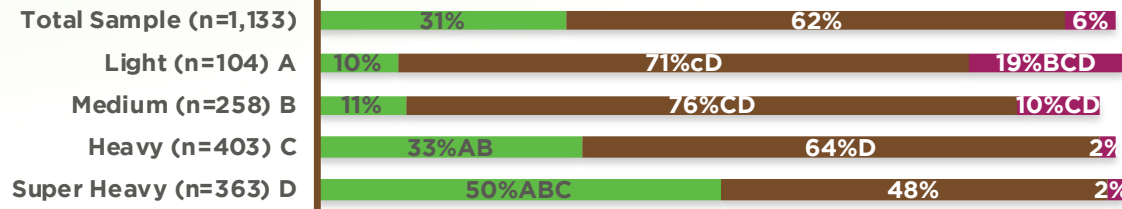


Q140 - For which meal occasions at home do you or others in your household typically use avocados?

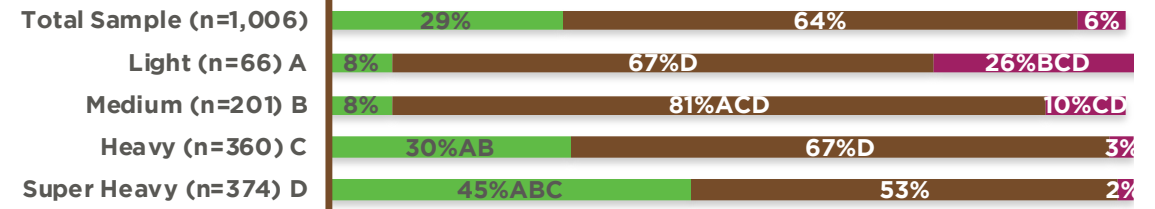
CHANGE IN USE OF AVOCADOS FOR MEAL OCCASION COMPARED TO A YEAR AGO

WHILE THERE IS SOME CLAIMED INCREASE IN USAGE FOR ALL MEAL PARTS ACROSS ALL SEGMENTS, THIS GENERALLY INCREASES AS AVOCADO PURCHASES INCREASE. WHILE LIGHT PURCHASERS HAVE A NET DECREASE (INCREASE MINUS DECREASE) FOR SEVERAL MEAL OCCASIONS, THESE BASE SIZES ARE VERY SMALL

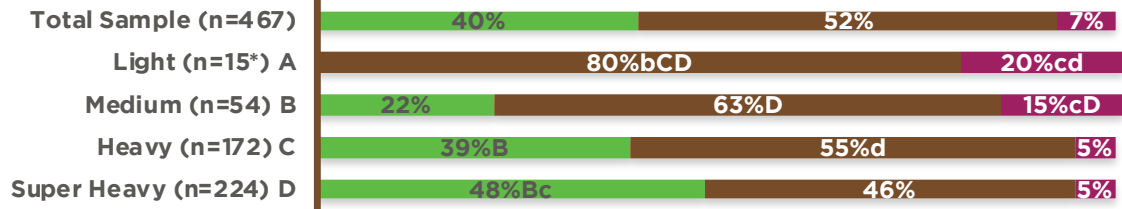
DINNER



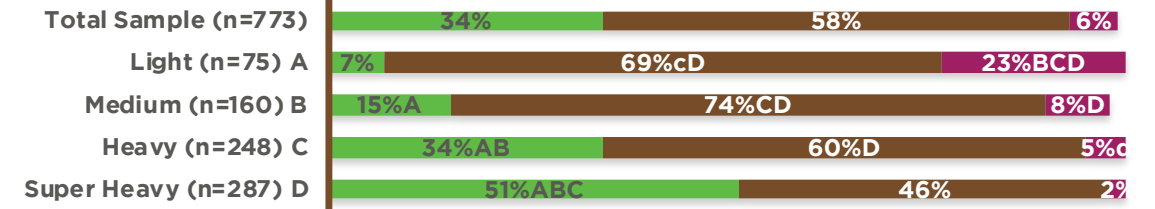
LUNCH



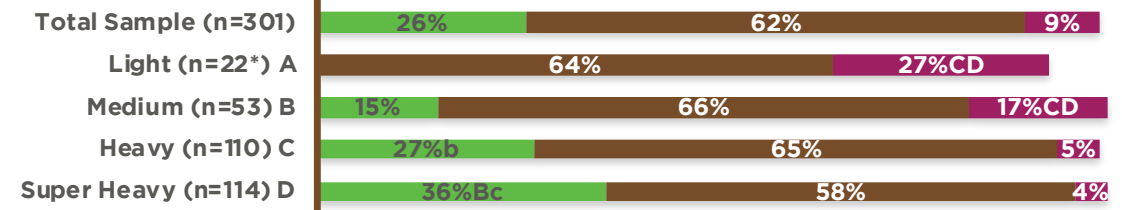
BREAKFAST



SNACKS



PARTIES/SPECIAL EVENTS



More often About the same Less Often

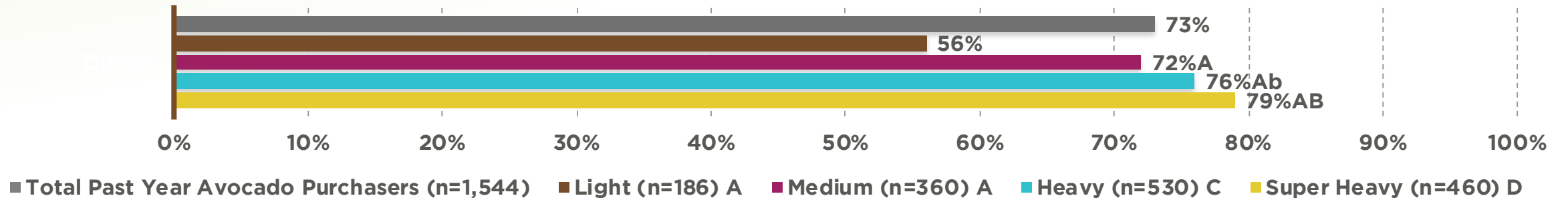
NOTE: Some bars may not add to 100% due to rounding and omission of "Not Sure"

Q150 - For each meal occasion at home, are you or others in your household using avocados less often, about the same, or more often than you did a year ago?

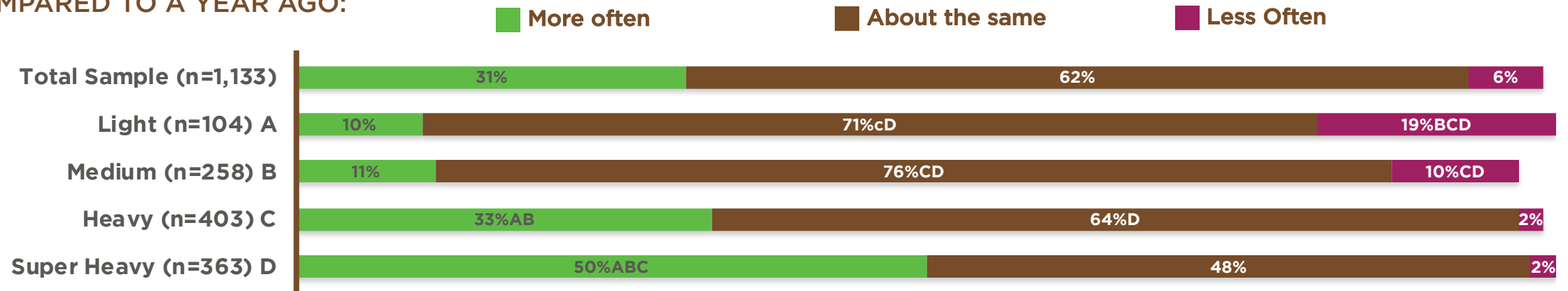
*Caution: Small base size

HOUSEHOLD TYPICALLY USES AVOCADOS FOR DINNER

THE USE OF AVOCADOS AT DINNER INCREASES AS AVOCADO PURCHASE LEVELS INCREASE.



CHANGE FOR DINNER COMPARED TO A YEAR AGO:

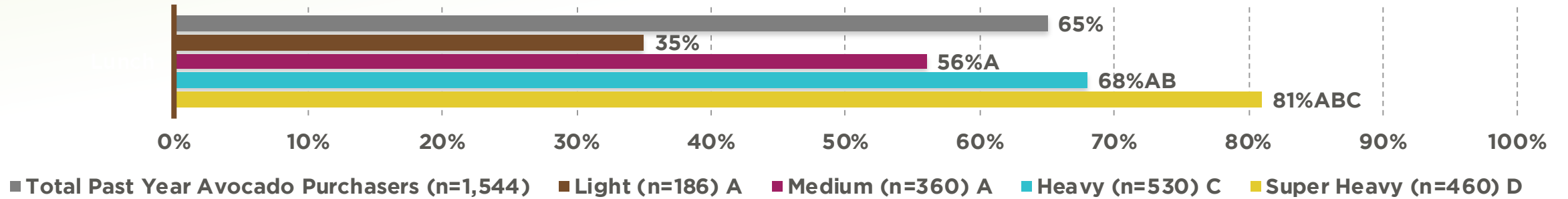


Q140 - For which meal occasions at home do you or others in your household typically use avocados?

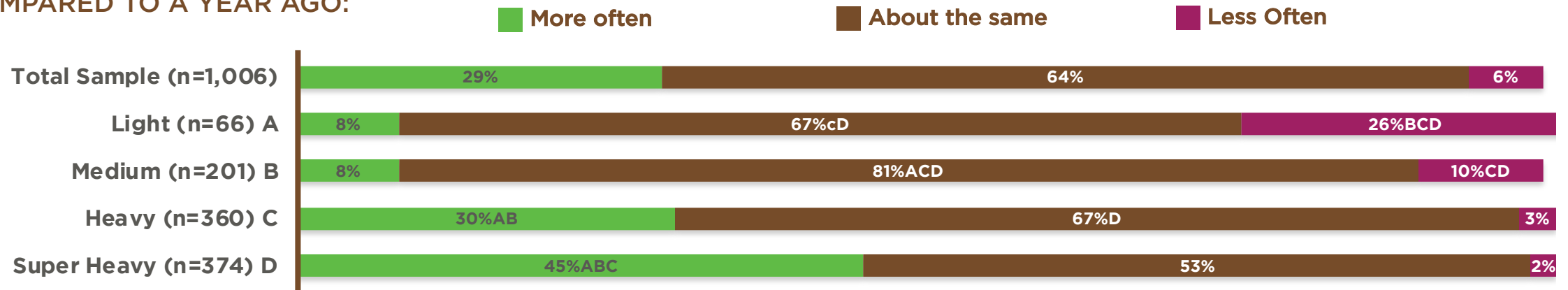
Q150 - For each meal occasion at home, are you or others in your household using avocados less often, about the same, or more often than you did a year ago?

HOUSEHOLD TYPICALLY USES AVOCADOS FOR LUNCH

THE USE OF AVOCADOS AT LUNCH INCREASES AS AVOCADO PURCHASE LEVELS INCREASE.



CHANGE FOR LUNCH COMPARED TO A YEAR AGO:

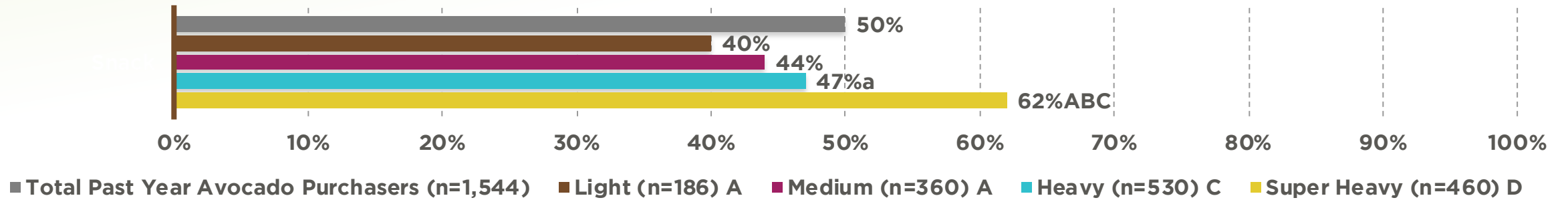


Q140 - For which meal occasions at home do you or others in your household typically use avocados?

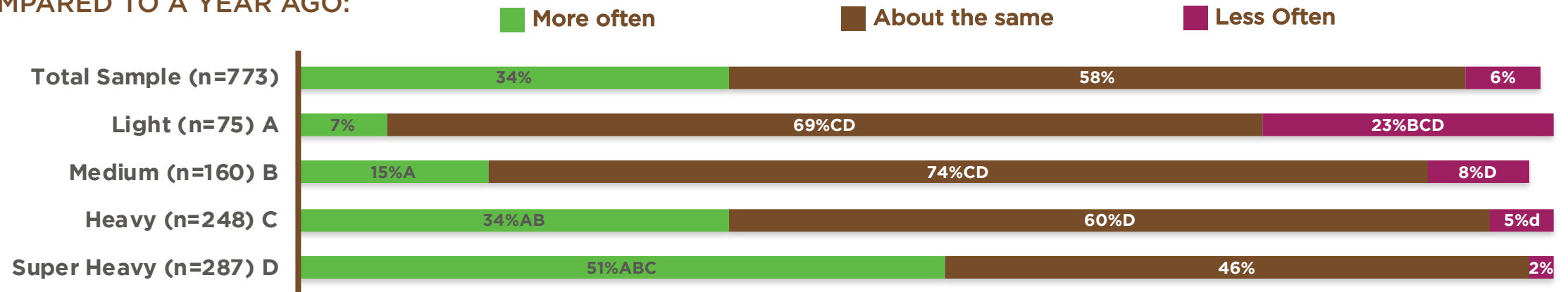
Q150 - For each meal occasion at home, are you or others in your household using avocados less often, about the same, or more often than you did a year ago?

HOUSEHOLD TYPICALLY USES AVOCADOS FOR SNACKS

THE USE OF AVOCADOS FOR SNACKS INCREASES AS AVOCADO PURCHASE LEVELS INCREASE.



CHANGE FOR SNACKS COMPARED TO A YEAR AGO:

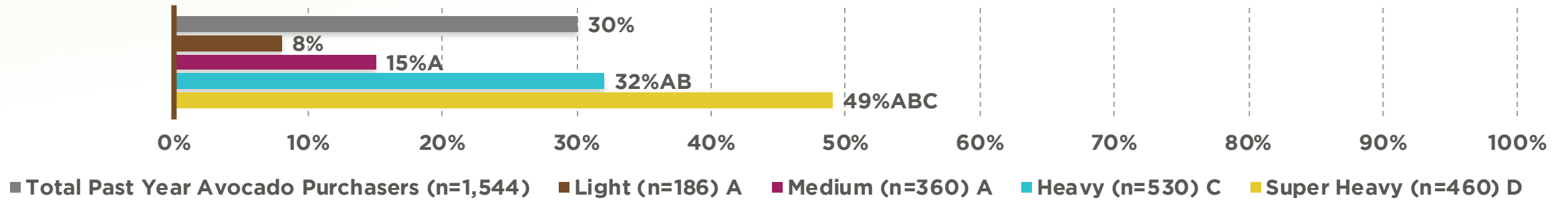


Q140 - For which meal occasions at home do you or others in your household typically use avocados?

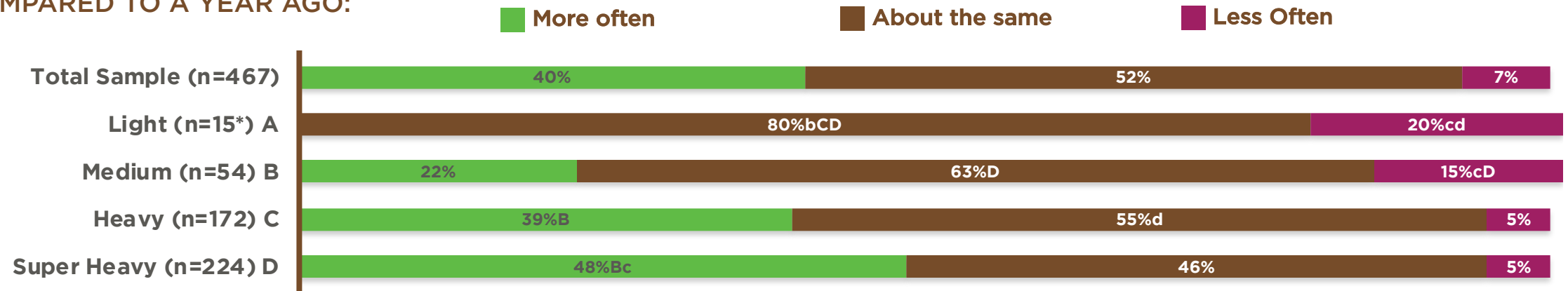
Q150 - For each meal occasion at home, are you or others in your household using avocados less often, about the same, or more often than you did a year ago?

HOUSEHOLD TYPICALLY USES AVOCADOS FOR BREAKFAST

THE USE OF AVOCADOS AT BREAKFAST INCREASES AS AVOCADO PURCHASE LEVELS INCREASE.



CHANGE FOR BREAKFAST COMPARED TO A YEAR AGO:



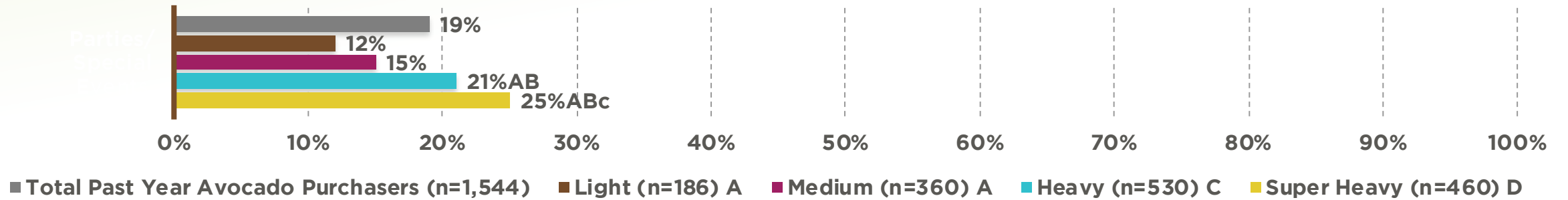
Q140 - For which meal occasions at home do you or others in your household typically use avocados?

Q150 - For each meal occasion at home, are you or others in your household using avocados less often, about the same, or more often than you did a year ago?

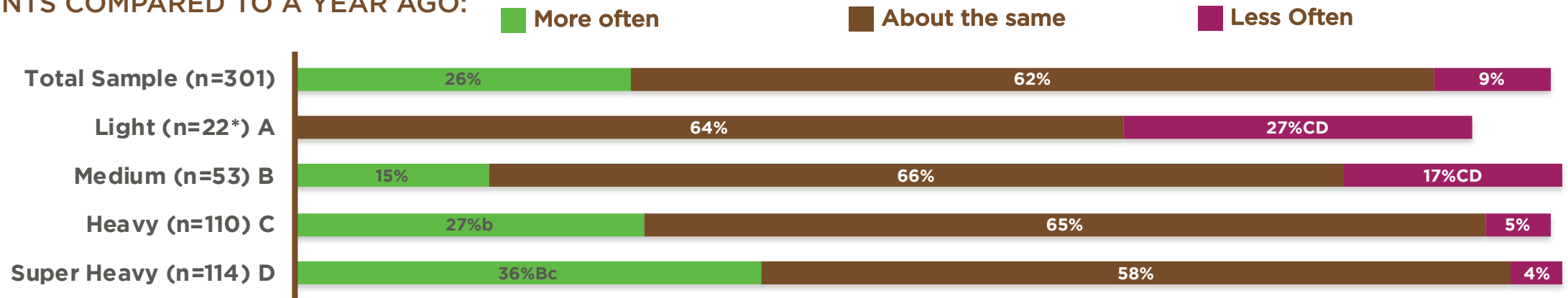
*Caution: Small base size

HOUSEHOLD TYPICALLY USES AVOCADOS FOR PARTIES/SPECIAL EVENTS

THE USE OF AVOCADOS FOR PARTIES/SPECIAL EVENTS MOSTLY INCREASES AS AVOCADO PURCHASE LEVELS INCREASE. THERE IS NO DIFFERENCE BETWEEN LIGHT AND MEDIUM USERS.



CHANGE FOR PARTIES/SPECIAL EVENTS COMPARED TO A YEAR AGO:



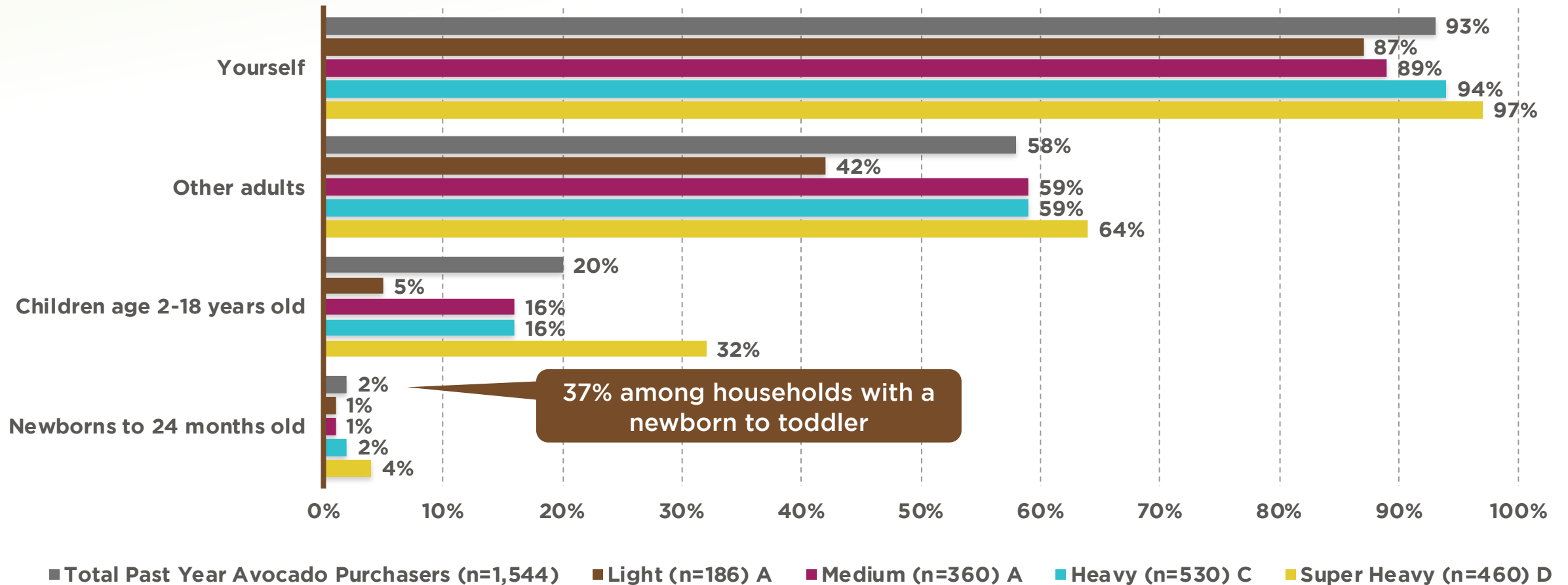
Q140 - For which meal occasions at home do you or others in your household typically use avocados?

Q150 - For each meal occasion at home, are you or others in your household using avocados less often, about the same, or more often than you did a year ago?

*Caution: Small base size

HOUSEHOLD MEMBERS CONSUMING AVOCADOS

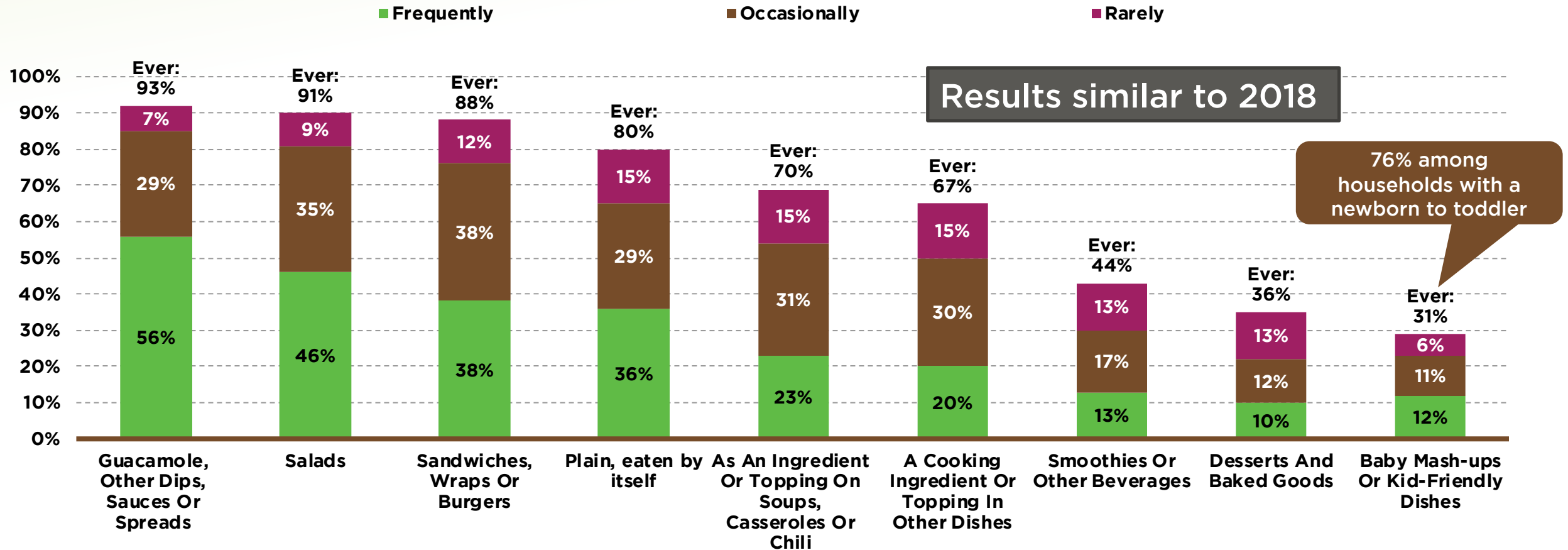
AVOCADO CONSUMPTION IS HIGHER AMONG OTHER HOUSEHOLD MEMBERS FOR SUPER HEAVY PURCHASERS. LAST YEAR, HEAVY PURCHASERS BEHAVED MORE LIKE SUPER PURCHASERS. THIS YEAR THEY ALIGN WITH MEDIUM PURCHASERS.



Q160 – Who in your household eats avocados or dishes made at home with avocados?

HOW AVOCADOS ARE CONSUMED (TOTAL PAST YEAR AVOCADO PURCHASERS)

GUACAMOLE/DIPS, SALADS AND SANDWICHES/WRAPS/BURGERS REMAIN THE MOST COMMON WAYS OF USING AVOCADOS.



Q170 - How are avocados consumed in your household and how often?

WAYS FREQUENTLY/OCCASIONALLY CONSUME AVOCADOS

THE STRONGEST OVERLAP IN USAGE IS GUACAMOLE/DIP, SALADS AND SANDWICHES/WRAPPS/BURGERS. AS SEEN LAST YEAR, THOSE WHO HAVE EMBRACED AVOCADOS IN SANDWICHES/WRAPPS/BURGERS TEND TO USE THEM IN MORE WAYS OVERALL.

Consume avocados frequently/occasionally:	In Guacamole (n=1,357)	In Salads (n=1,329)	On Sandwiches, Wraps or Burgers (n=1,226)
	% A	% B	% C
In guacamole, other dips, sauces or spreads	100	88	90B
In salads	84	100	89A
On sandwiches, wraps or burgers	80	83A	100
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	67	71A	72A
As an ingredient or topping on soups, casseroles or chili	59	60	64AB
As a cooking ingredient or topping in dishes other than those listed above	55	57A	60AB
In smoothies or other beverages	32	34A	36AB
In baby mash-ups or kid- friendly dishes	26	27A	29AB
In desserts and baked goods, such as puddings and cakes	24	26A	28AB

WAYS FREQUENTLY/OCCASIONALLY CONSUME AVOCADOS

MANY LIGHT PURCHASERS HAVE MOVED FROM GUACAMOLE TO SALADS, SANDWICHES, WRAPS AND BURGERS; BUT THEY HAVE NOT EMBRACED OTHER WAYS OF USING AVOCADOS THE WAY WE SEE AMONG OTHER SEGMENTS. THE BEST CROSS-OVER TO OTHER WAYS OF USING AVOCADOS IS SEEN AMONG SUPER HEAVY USERS.

Consume avocados <u>IN GUACAMOLE</u> frequently/occasionally:	Light (n=140) % A	Medium (n=299) % B	Heavy (n=474) % C	Super (n=433) % D
In salads	55	76A	88AB	94ABC
On sandwiches, wraps or burgers	48	67A	86AB	94ABC
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	33	49A	69AB	88ABC
As an ingredient or topping on soups, casseroles or chili	25	38A	64AB	80ABC
As a cooking ingredient or topping in dishes other than those listed above	24	34A	56AB	77ABC
In smoothies or other beverages	12	16	27AB	55ABC
In baby mash-ups or kid- friendly dishes	5	12A	23AB	46ABC
In desserts and baked goods, such as puddings and cakes	4	10A	22AB	41ABC

WAYS FREQUENTLY/OCCASIONALLY CONSUME AVOCADOS

LARGE PORTIONS OF LIGHT PURCHASERS WHO USE AVOCADOS IN SALADS ARE ALSO USING THEM IN GUACAMOLE OR SANDWICHES, WRAPS AND BURGERS. USAGE IN OTHER WAYS DROPS OFF AFTER THAT. THE BEST CROSS USAGE IS SEEN AMONG SUPER HEAVY PURCHASERS.

Consume avocados <u>IN SALADS</u> frequently/occasionally:	Light (n=117) % A	Medium (n=295) % B	Heavy (n=460) % C	Super (n=446) % D
In guacamole, other dips, sauces or spreads	82	84	88ab	93ABC
On sandwiches, wraps or burgers	53	75A	86AB	93ABC
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	42	55A	72AB	87ABC
As an ingredient or topping on soups, casseroles or chili	31	41a	60AB	78ABC
As a cooking ingredient or topping in dishes other than those listed above	27	39A	55AB	77ABC
In smoothies or other beverages	16	16	28AB	54ABC
In baby mash-ups or kid- friendly dishes	5	13A	23AB	45ABC
In desserts and baked goods, such as puddings and cakes	7	12a	23AB	41ABC

WAYS FREQUENTLY/OCCASIONALLY CONSUME AVOCADOS

LARGE PORTIONS OF LIGHT PURCHASERS WHO USE AVOCADOS ON SANDWICHES, WRAPS OR BURGERS ARE ALSO USING THEM IN GUACAMOLE OR SALADS. USAGE IN OTHER WAYS DROPS OFF AFTER THAT. THE BEST CROSS USAGE IS SEEN AMONG SUPER HEAVY PURCHASERS.

Consume avocados <u>ON SANDWICHES, WRAPS OR BURGERS</u> frequently/occasionally:	Light (n=95) % A	Medium (n=248) % B	Heavy (n=447) % C	Super (n=426) % D
In guacamole, other dips, sauces or spreads	90b	84	90B	94BC
In salads	66	85A	90Ab	94ABC
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	42	58A	71AB	87ABC
As an ingredient or topping on soups, casseroles or chili	33	46A	65AB	78ABC
As a cooking ingredient or topping in dishes other than those listed above	32	42a	58AB	78ABC
In smoothies or other beverages	15	18	30AB	55ABC
In baby mash-ups or kid- friendly dishes	7	16A	24AB	46ABC
In desserts and baked goods, such as puddings and cakes	8	15a	23AB	43ABC

WAYS EVER CONSUMED AVOCADOS

AS AVOCADO USAGE GOES UP, THE WAYS AVOCADOS ARE EVER USED ALSO INCREASES.

	Light (n=186) % A	Medium (n=360) % B	Heavy (n=530) % C	Super Heavy (n=460) % D
In guacamole, other dips, sauces or spreads	88	91a	94Ab	97ABC
In salads	73	89A	94AB	97ABc
On sandwiches, wraps or burgers	63	84A	92AB	97ABC
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	54	69A	85AB	93ABC
As an ingredient or topping on soups, casseroles or chili	39	58A	73AB	87ABC
As a cooking ingredient or topping in dishes other than those listed above	33	55A	71AB	85ABC
In smoothies or other beverages	18	28A	45AB	68ABC
In desserts and baked goods, such as puddings and cakes	9	22A	37AB	57ABC
In baby mash-ups or kid- friendly dishes	8	19A	29AB	52ABC

WAYS FREQUENTLY CONSUME AVOCADOS

AFTER GUACAMOLE AND DIPS, LIGHT PURCHASERS FREQUENT USE OF AVOCADOS DROPS OFF SIGNIFICANTLY. OTHER USES IMPROVES AMONG MEDIUM PURCHASERS, BUT IS DWARFED BY HEAVY AND SUPER HEAVY PURCHASERS.

	Light (n=186) % A	Medium (n=360) % B	Heavy (n=530) % C	Super Heavy (n=460) % D
In guacamole, other dips, sauces or spreads	27	52A	59AB	67ABC
In salads	14	34A	48AB	65ABC
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	9	22A	35AB	58ABC
On sandwiches, wraps or burgers	8	22A	41AB	60ABC
As an ingredient or topping on soups, casseroles or chili	4	7a	23AB	43ABC
In smoothies or other beverages	3	2	10AB	30ABC
As a cooking ingredient or topping in dishes other than those listed above	2	9A	17AB	38ABC
In desserts and baked goods, such as puddings and cakes	1	3A	7AB	22ABC
In baby mash-ups or kid- friendly dishes		4	11B	26BC

WAYS FREQUENTLY/OCCASIONALLY CONSUME AVOCADOS

WHEN AT LEAST OCCASIONALLY IS ADDED TO FREQUENTLY, SALADS AND SANDWICHES/WRAPPS/BURGERS MOVE UP AMONG LIGHT PURCHASERS.

	Light (n=186) % A	Medium (n=360) % B	Heavy (n=530) % C	Super Heavy (n=460) % D
In guacamole, other dips, sauces or spreads	74	82A	85Ab	91ABC
In salads	49	74A	85AB	92ABC
On sandwiches, wraps or burgers	39	66A	82AB	91ABC
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	34	49A	68AB	86ABC
As an ingredient or topping on soups, casseroles or chili	20	36A	58AB	75ABC
As a cooking ingredient or topping in dishes other than those listed above	20	33A	52AB	74ABC
In smoothies or other beverages	11	16a	27AB	53ABC
In baby mash-ups or kid- friendly dishes	4	12A	21AB	44ABC
In desserts and baked goods, such as puddings and cakes	3	11A	21AB	40ABC

AVOCADO PURCHASE DRIVERS AND BARRIERS

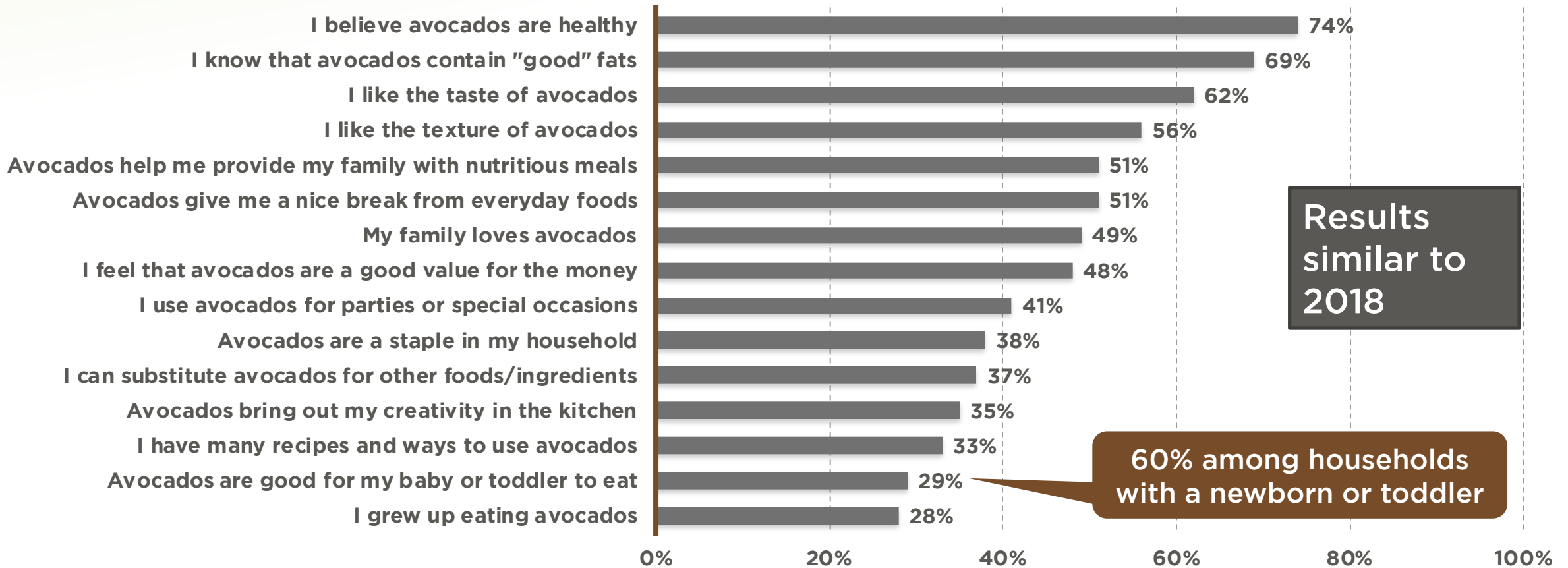
freshavocados

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ONE TODAY[®]

nutrient-dense • heart-healthy

REASONS FOR PURCHASING AVOCADOS (5 OR 4 ON A 5-POINT SCALE)(TOTAL SAMPLE)

PERCEPTIONS OF BEING HEALTHY, CONTAINING GOOD FAT AND GENERALLY LIKING THE TASTE AND TEXTURE OF AVOCADOS ARE TOP PURCHASE DRIVERS. BEING GOOD FOR YOUR BABY OR TODDLER IS ALSO A STRONG DRIVER AMONG HOUSEHOLDS WITH NEWBORNS TO TODDLERS.



Q180 - Below is a list of reasons why you personally [PIPE IF NEVER BOUGHT AVOCADOS (Q100/1=0)] might buy avocados for use in the home [PIPE IF BOUGHT AVOCADOS (Q100/1=1)] might buy avocados more often for use in the home. Please tell us how well each of these describe you on a scale from 1 to 5 where a "1" is "Does Not Describe Me at All" and a "5" is "Describes Me Very Well".

REASONS FOR PURCHASING AVOCADOS (5 OR 4 ON A 5-POINT SCALE)

NON-PURCHASERS GENERALLY SCORE LOW ON MOST REASONS FOR PURCHASING AVOCADOS - WITH BEING HEALTHY AT THE TOP. SCORES IMPROVE SIGNIFICANTLY AMONG ALL PURCHASERS, AND ARE VERY HIGH AMONG HEAVY AND SUPER HEAVY PURCHASERS. ALL SCORES ARE SIMILAR TO LAST YEAR.

	Total Purchasers (n=1,544)	Non-Purchasers (n=766) % A	Light (n=186) % B	Medium (n=360) % C	Heavy (n=530) % D	Super Heavy (n=460) % E
I believe avocados are healthy	88	46	77A	84Ab	90ABC	93ABCd
I know that avocados contain “good” fats	84	39	75A	78A	86ABC	92ABCD
I like the taste of avocados	84	19	59A	81AB	88ABC	92ABCd
I like the texture of avocados	77	16	49A	67AB	83ABC	89ABCD
Avocados help me provide my family with nutritious meals	72	13	40A	57AB	78ABC	90ABCD
Avocados give me a nice break from everyday foods	70	15	42A	59AB	75ABC	84ABCD
My family loves avocados	69	9	28A	61AB	75ABC	88ABCD
I feel that avocados are a good value for the money	65	16	42A	49Ab	69ABC	82ABCD
I use avocados for parties or special occasions	59	9	26A	48AB	63ABC	76ABCD
Avocados are a staple in my household	57	5	11A	31AB	65ABC	87ABCD
I can substitute avocados for other foods/ingredients	51	10	20A	38AB	52ABC	73ABCD
Avocados bring out my creativity in the kitchen	51	7	15A	33AB	55ABC	73ABCD
I have many recipes and ways to use avocados	48	7	11a	27AB	52ABC	75ABCD
Avocados are good for my baby or toddler to eat	39	10	14a	25AB	38ABC	61ABCD
I grew up eating avocados	40	5	13A	25AB	40ABC	62ABCD

Q180 - Below is a list of reasons why you personally [PIPE IF NEVER BOUGHT AVOCADOS (Q100/1=0)] might buy avocados for use in the home [PIPE IF BOUGHT AVOCADOS (Q100/1=1)] might buy avocados more often for use in the home. Please tell us how well each of these describe you on a scale from 1 to 5 where a “1” is “Does Not Describe Me at All” and a “5” is “Describes Me Very Well”.

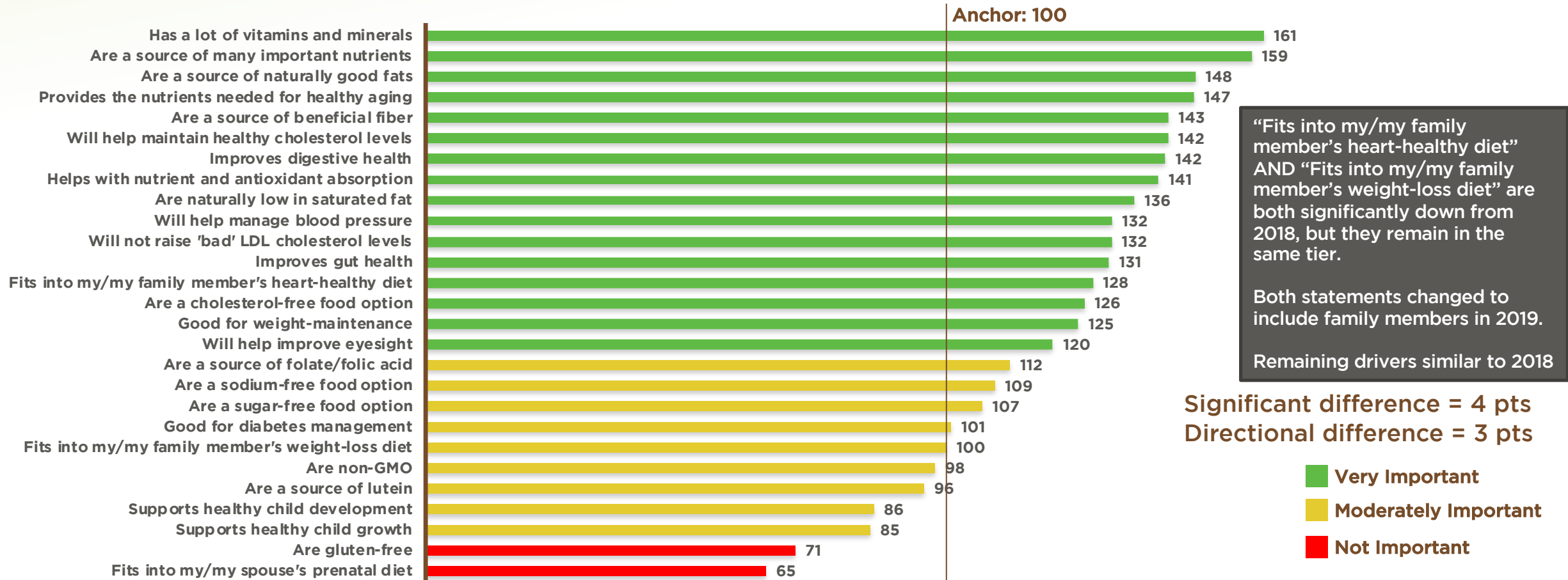
MAXDIFF EXPLANATION

- A common concern with traditional marketing research importance ratings is that everything tends to be rated as fairly important. Even more of an issue is understanding the relative degree of importance between two variables. With ratings, you can determine what is most important, but you can not tell the relative degree of being more important.
- Maximum Difference Scaling (MaxDiff) was developed to address this. It is a fairly simple trade-off exercise for respondents. The result is that you can tell relative difference in importance. For example, something with a score of 30 really is twice as important as something with a score of 15.
- While MaxDiff addresses the issue of relative importance, it fails to tell you if anything is actually important. To address this, a second exercise, called “anchoring” is incorporated. It determines the score at which variables are indeed important. Anything well above this anchor is very important, anything within a limited range of the anchor is important, and anything below this range is deemed unimportant.
- To simplify reporting, all scores are indexed against the “anchor”. The anchor is a variable determined within each study. For indexing, it is set to always equal 100. Therefore, you cannot compare absolute index scores from one study to another. All you can compare is how they fall relative to the “anchor”.

ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

TOTAL SAMPLE

AS SEEN LAST YEAR, THE TOP TWO DECISION DRIVERS WHEN PURCHASING FRESH PRODUCE ARE A LOT OF VITAMINS AND MINERALS AND BEING A SOURCE OF MANY IMPORTANT NUTRIENTS. ANOTHER 14 ATTRIBUTES ARE ALSO VERY IMPORTANT. MOST OF THE REST ARE MODERATELY IMPORTANT.



ATTRIBUTES CONSIDERED MOST IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

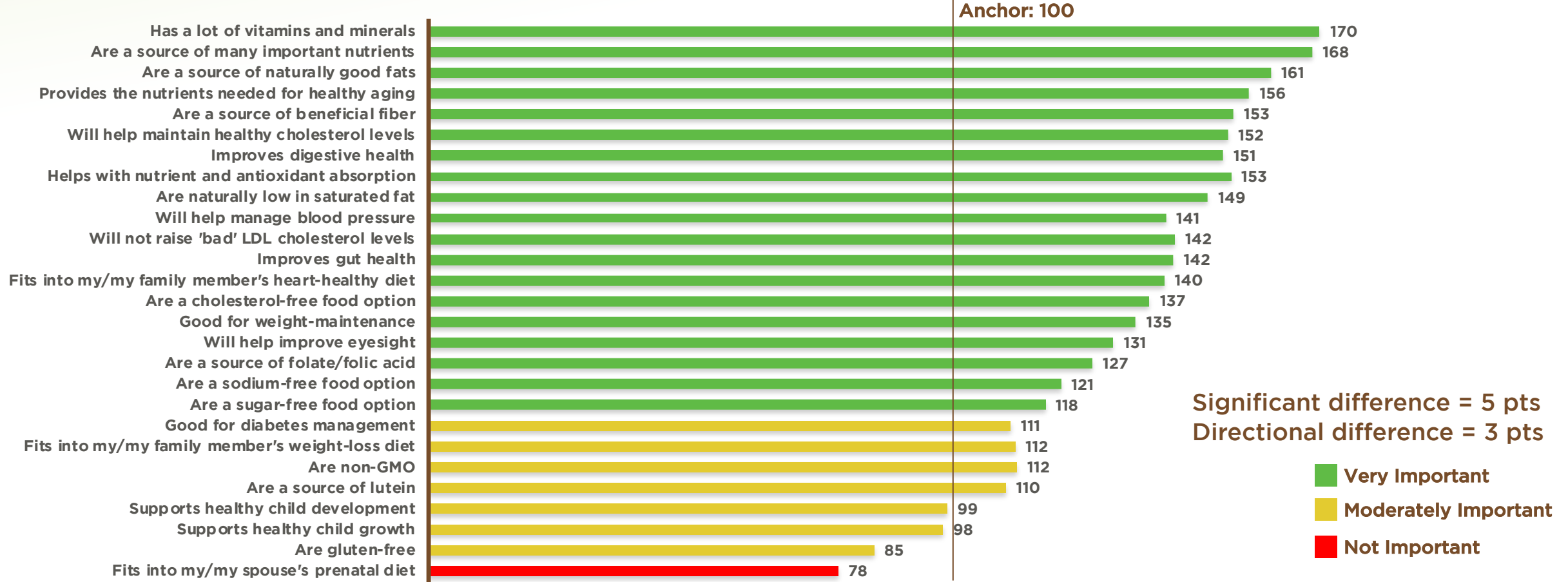
WHILE THE DEGREE OF IMPORTANCE VARIES, THE TOP TWO DECISION DRIVERS ARE THE SAME ACROSS ALL USER SEGMENTS. AS AVOCADO CONSUMPTION INCREASES, THE IMPORTANCE OF THE DIFFERENT ATTRIBUTES ALSO INCREASES.

	Total Sample	Total Purchasers	Non-Purchasers	Light	Medium	Heavy	Super Heavy
Has a lot of vitamins and minerals	161	170	144	158	159	174	180
Are a source of many important nutrients	159	168	140	156	156	173	179
Are a source of naturally good fats	148	161	123	145	146	166	173
Provides the nutrients needed for healthy aging	147	156	130	144	142	160	169
Are a source of beneficial fiber	143	153	122	132	139	159	169
Will help maintain healthy cholesterol levels	142	152	123	134	138	156	167
Improves digestive health	142	151	124	133	135	156	168
Helps with nutrient and antioxidant absorption	141	153	117	134	135	158	170
Are naturally low in saturated fat	136	149	112	128	130	155	165
Will help manage blood pressure	132	141	115	120	125	142	159
Will not raise 'bad' LDL cholesterol levels	132	142	111	123	125	147	159
Improves gut health	131	142	111	121	122	147	162
Fits into my/my family member's heart-healthy diet	128	140	105	115	118	147	160
Are a cholesterol-free food option	126	137	106	112	121	142	156
Good for weight-maintenance	125	135	107	112	116	140	154
Will help improve eyesight	120	131	102	107	114	132	152

ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

TOTAL PURCHASERS

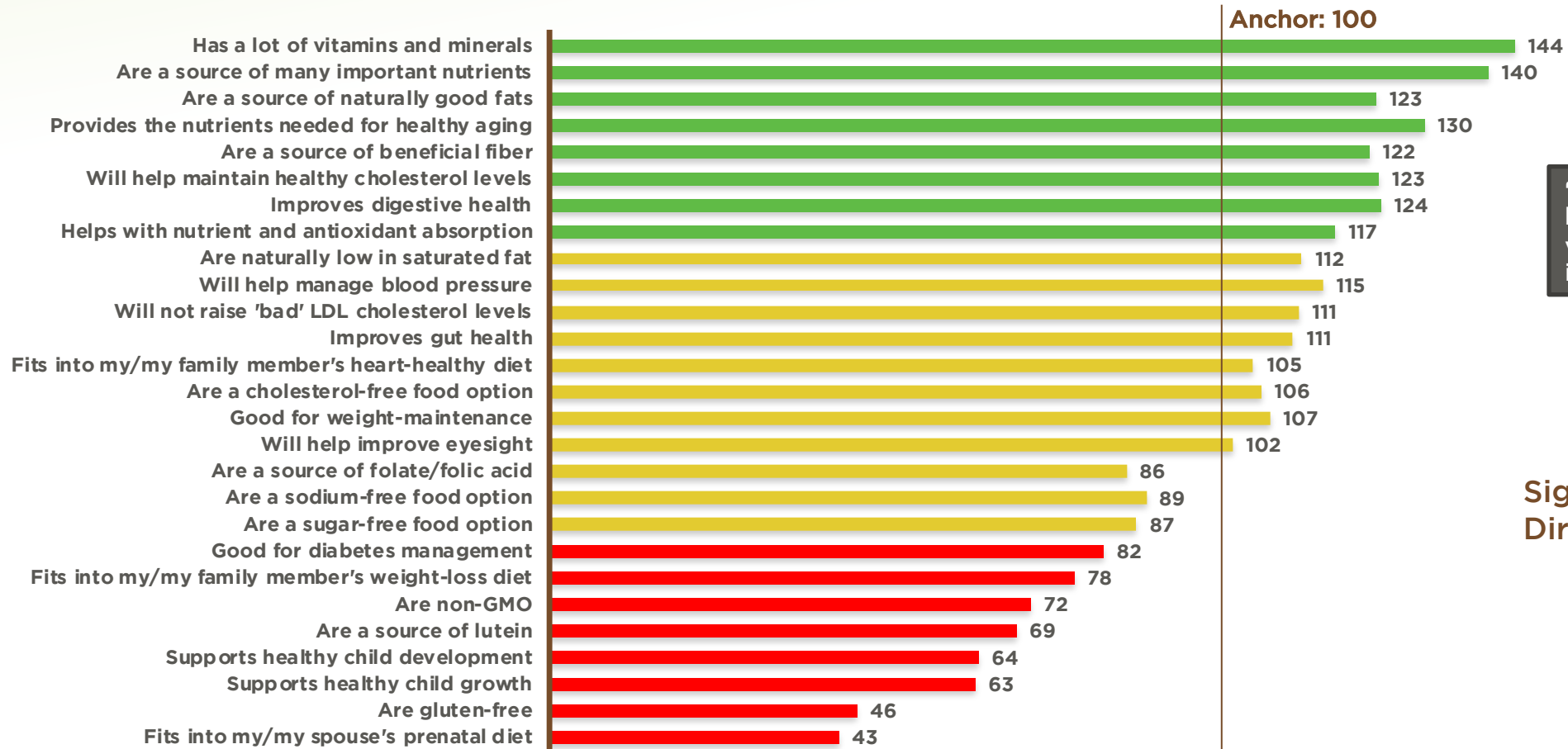
AMONG TOTAL AVOCADO PURCHASERS, THE TOP TWO DECISION DRIVERS WHEN PURCHASING FRESH PRODUCT ARE A LOT OF VITAMINS AND MINERALS AND BEING A SOURCE OF MANY IMPORTANT NUTRIENTS. ANOTHER 18 ATTRIBUTES ARE ALSO VERY IMPORTANT. MOST OF THE REST ARE MODERATELY IMPORTANT.



ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

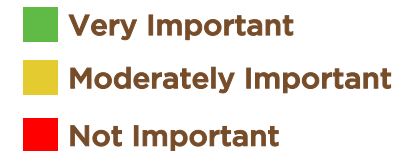
NON-AVOCADO PURCHASERS

NON-PURCHASERS OF AVOCADOS HAVE LESS ATTRIBUTES OF HIGH IMPORTANCE THAN SEEN OVERALL (8 VS. 16) AND MANY MORE NON-IMPORTANT ATTRIBUTES THAN SEE IN TOTAL (8 VS. 2).



"Fits into my/my family member's heart-healthy diet" moved from the very important tier to the moderately important tier

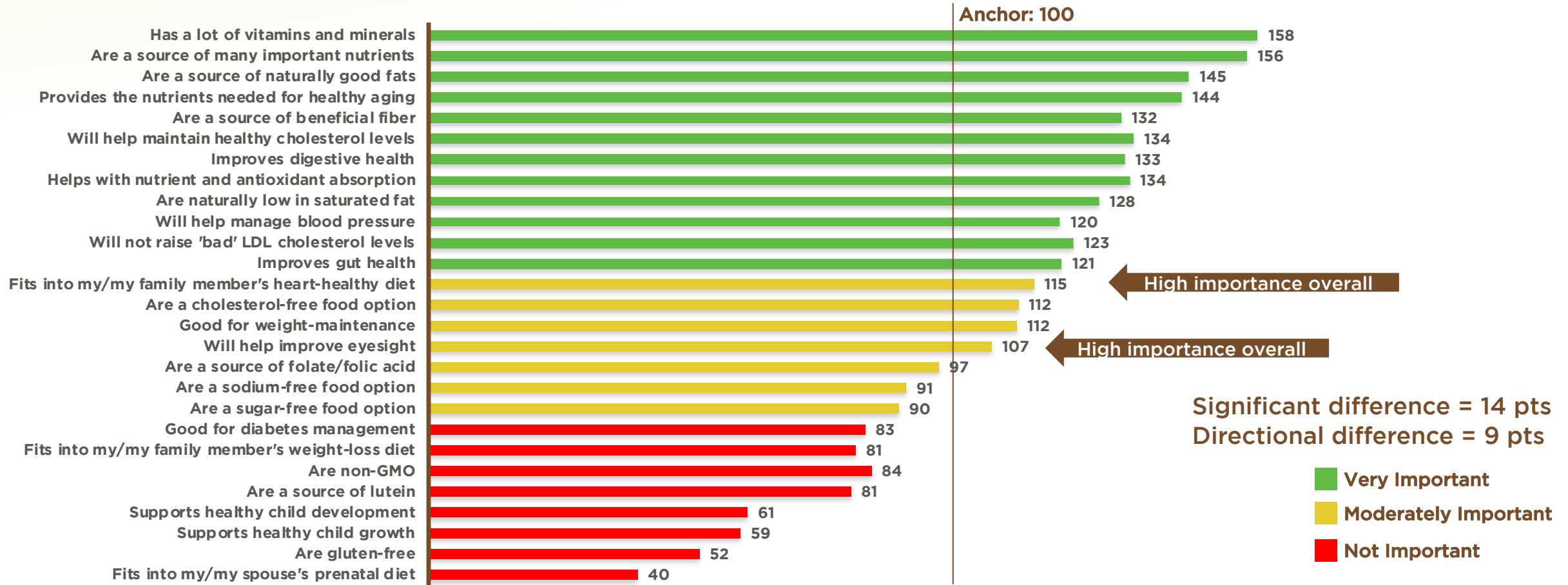
Significant difference = 7 pts
Directional difference = 5 pts



ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

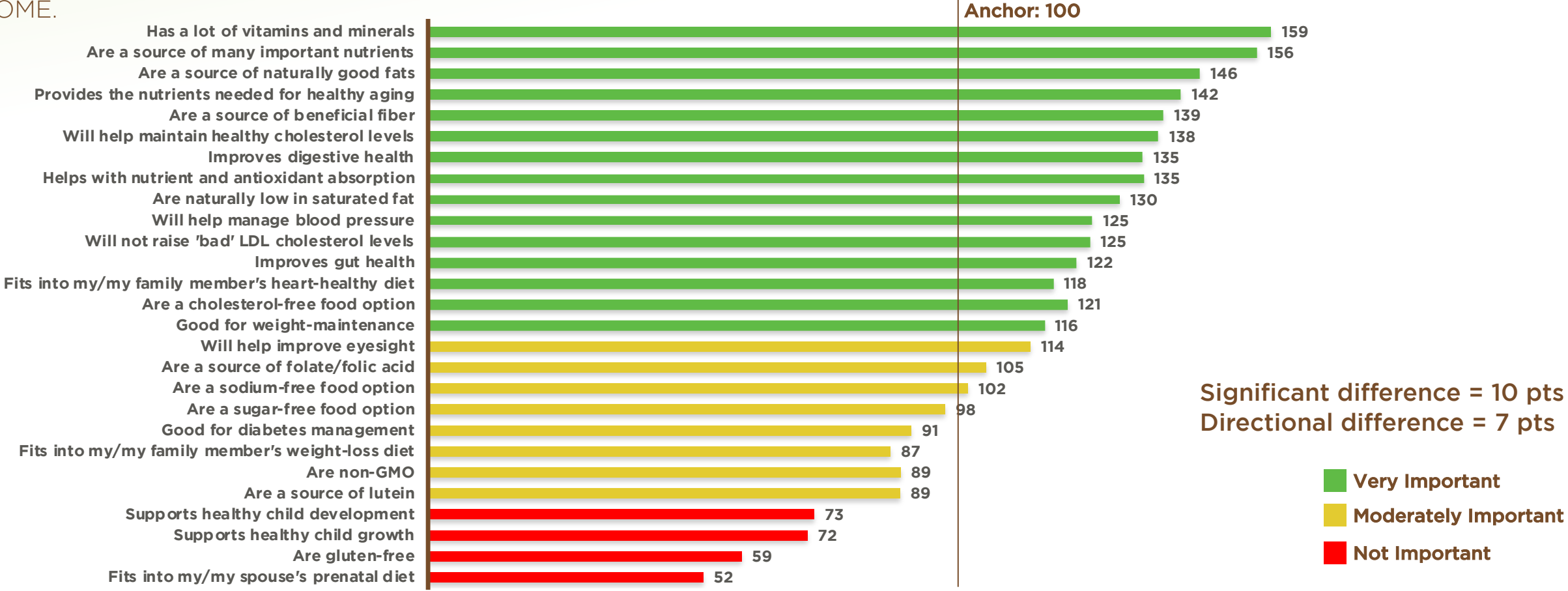
LIGHT AVOCADO PURCHASERS

FITS INTO A HEART HEALTHY DIET AND HELPING TO IMPROVE EYESIGHT, WHICH ARE OF HIGH IMPORTANCE OVERALL, DROP TO MODERATE IMPORTANCE AMONG LIGHT AVOCADO PURCHASERS. THIS GROUP HAS 8 RELATIVELY UNIMPORTANT ATTRIBUTES COMPARED TO ONLY 2 OVERALL.



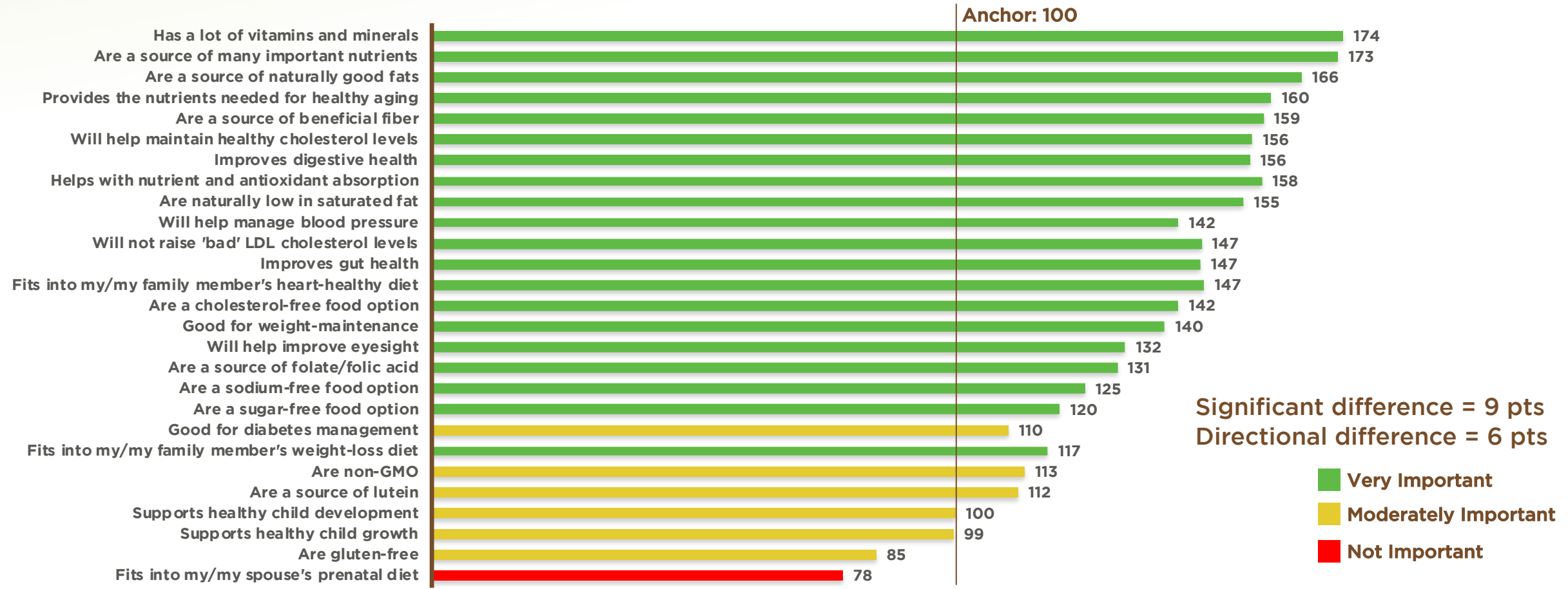
ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

MEDIUM AVOCADO PURCHASERS ARE MORE IN LINE WITH THE OVERALL SAMPLE, EXCEPT FOR HEALTHY CHILD GROWTH AND HEALTHY CHILD DEVELOPMENT FALLING INTO THE NON-IMPORTANT BUCKET (SAME AS LAST YEAR). THIS IS LIKELY ASSOCIATED WITH THEM BEING LESS LIKELY THAN HEAVY AND SUPER HEAVY PURCHASERS TO HAVE CHILDREN IN THEIR HOME.



ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

HEAVY AVOCADO PURCHASERS FIND 20 OF THE ATTRIBUTES TO BE OF HIGH IMPORTANCE, AND ONLY ONE OF LOW IMPORTANCE.



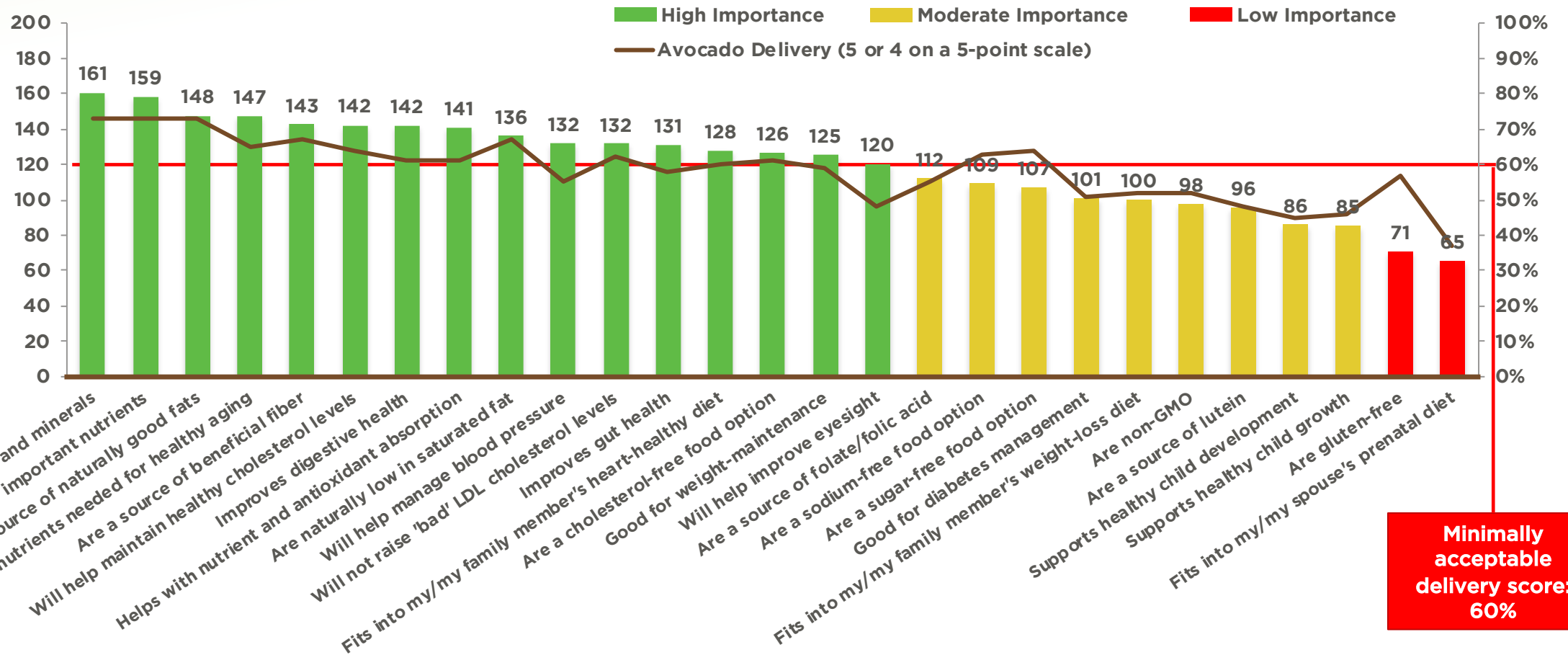
ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

SUPER HEAVY PURCHASERS CONSIDER ALMOST EVERY ATTRIBUTE TO BE HIGH IN IMPORTANCE.



ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

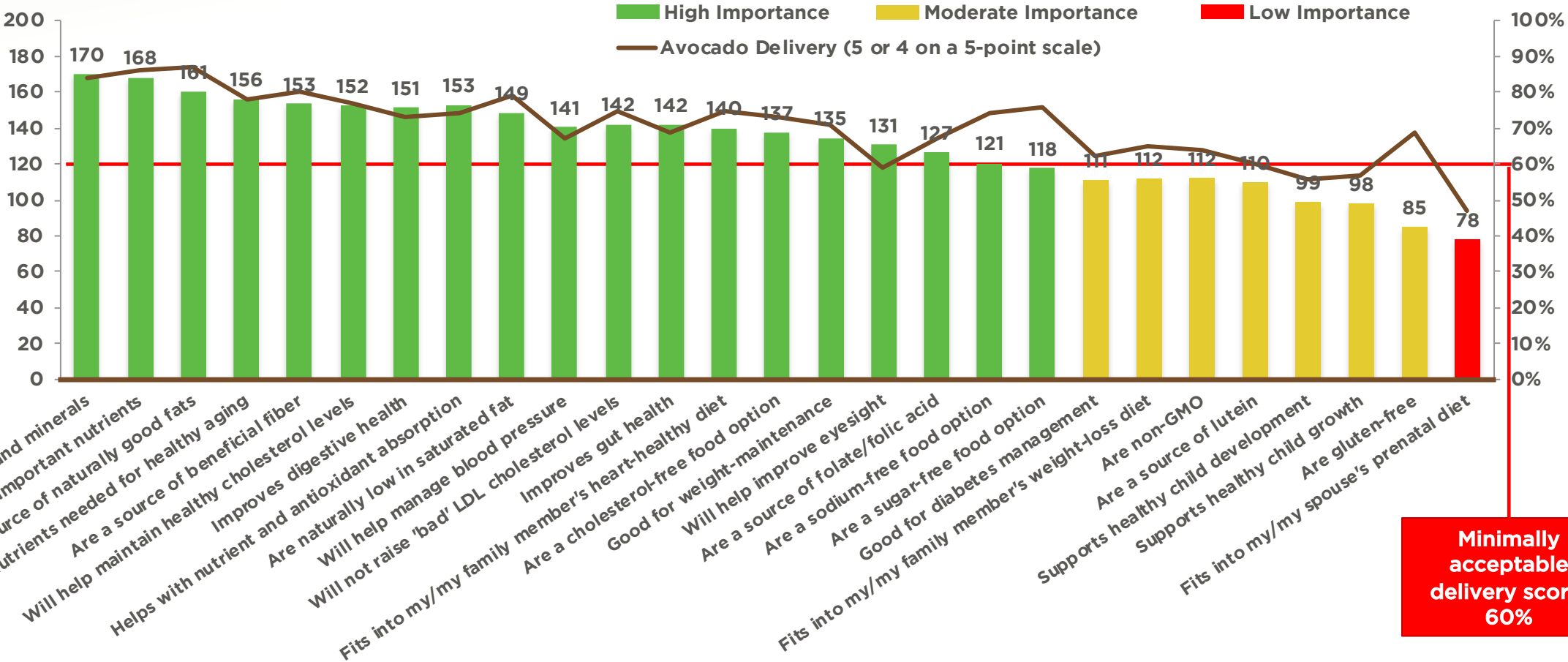
AVOCADOS CONTINUE TO HAVE REASONABLY STRONG PERCEIVED DELIVER AGAINST MANY, BUT NOT ALL OF THE MOST IMPORTANT ATTRIBUTES. AVOCADOS FALL SHORT ON MANY OF THE MODERATELY IMPORTANT ATTRIBUTES. SCORES ARE SIMILAR TO LAST YEAR.



Minimally acceptable delivery score: 60%

ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

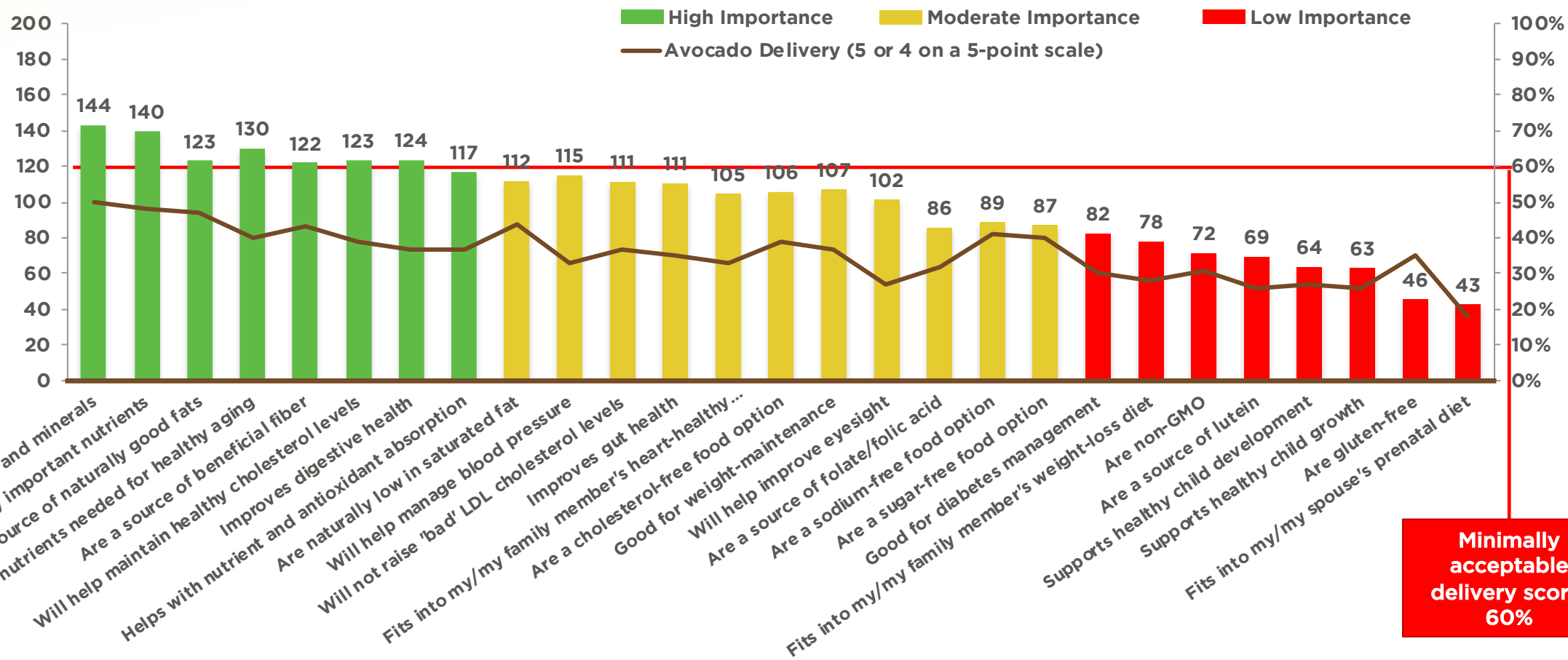
AMONG TOTAL AVOCADO PURCHASERS, AVOCADOS HAVE REASONABLY STRONG PERCEIVED DELIVER AGAINST ALL OF THE MOST IMPORTANT ATTRIBUTES. AVOCADOS FALL SOMEWHAT SHORT ON SOME OF THE MODERATELY IMPORTANT ATTRIBUTES.



Minimally acceptable delivery score: 60%

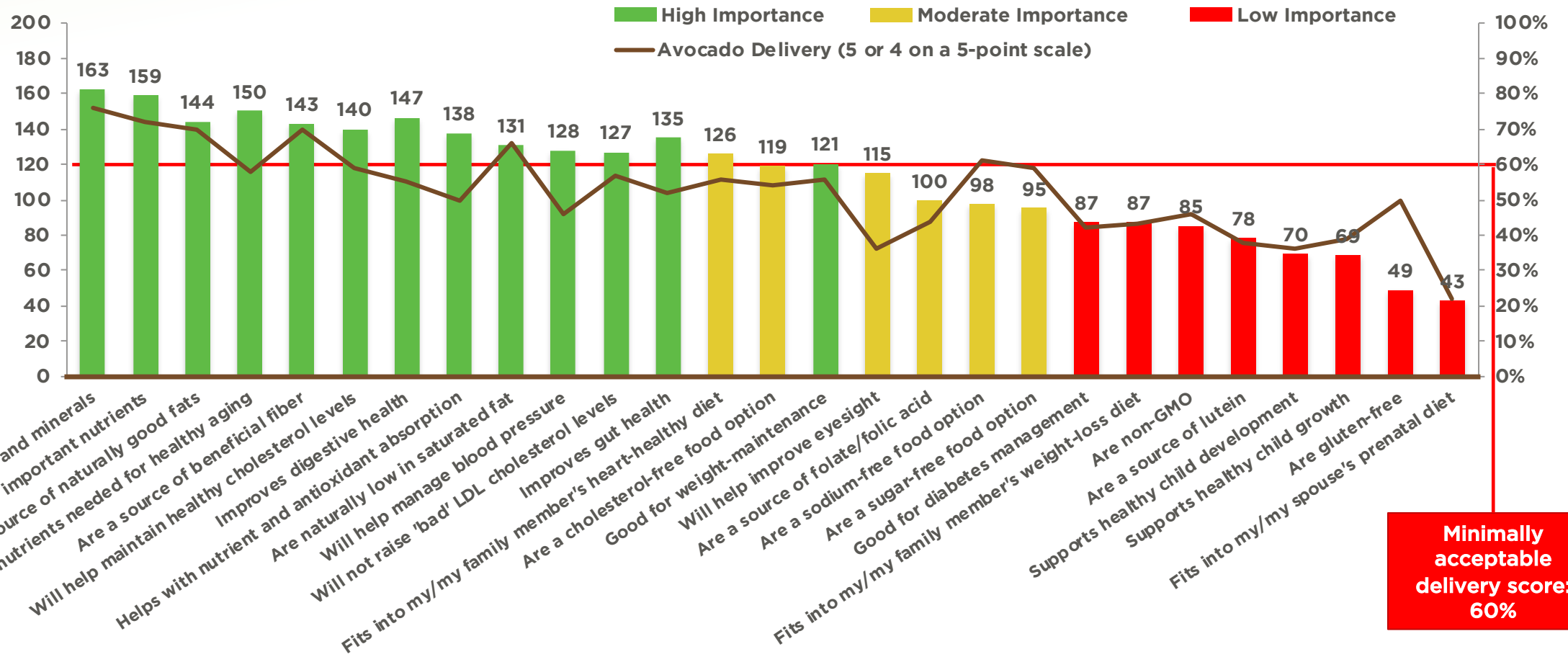
ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

AVOCADOS FALL BELOW MINIMALLY ACCEPTABLE NORMS AMONG NON-PURCHASERS FOR ALL ATTRIBUTES. MOST SCORES ARE SIMILAR TO LAST YEAR.



ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

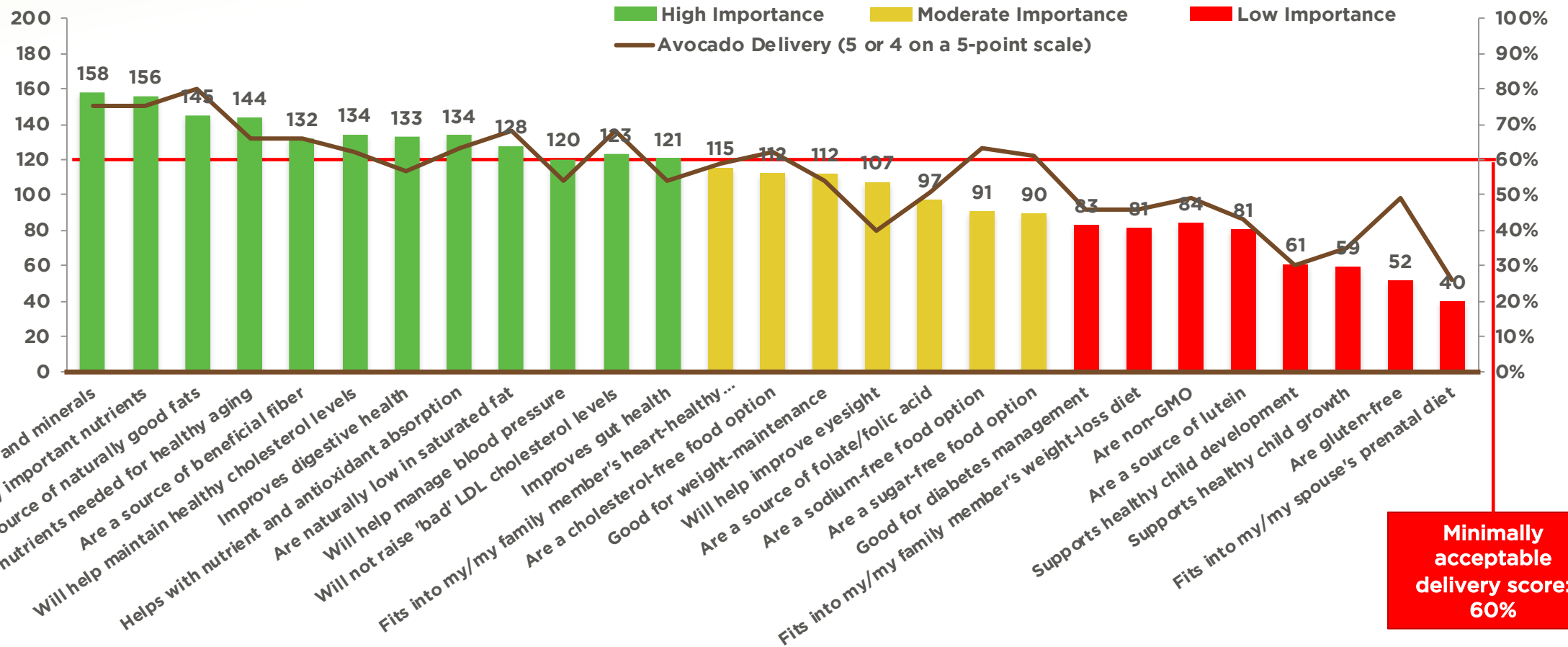
AS SEEN BEFORE, AVOCADOS RECEIVE STRONGER SCORES AMONG NON-PURCHASERS WHO DO ORDER AVOCADOS WHEN AWAY FROM HOME THAN SEEN AMONG NON-PURCHASERS OVERALL.



Minimally acceptable delivery score: 60%

ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

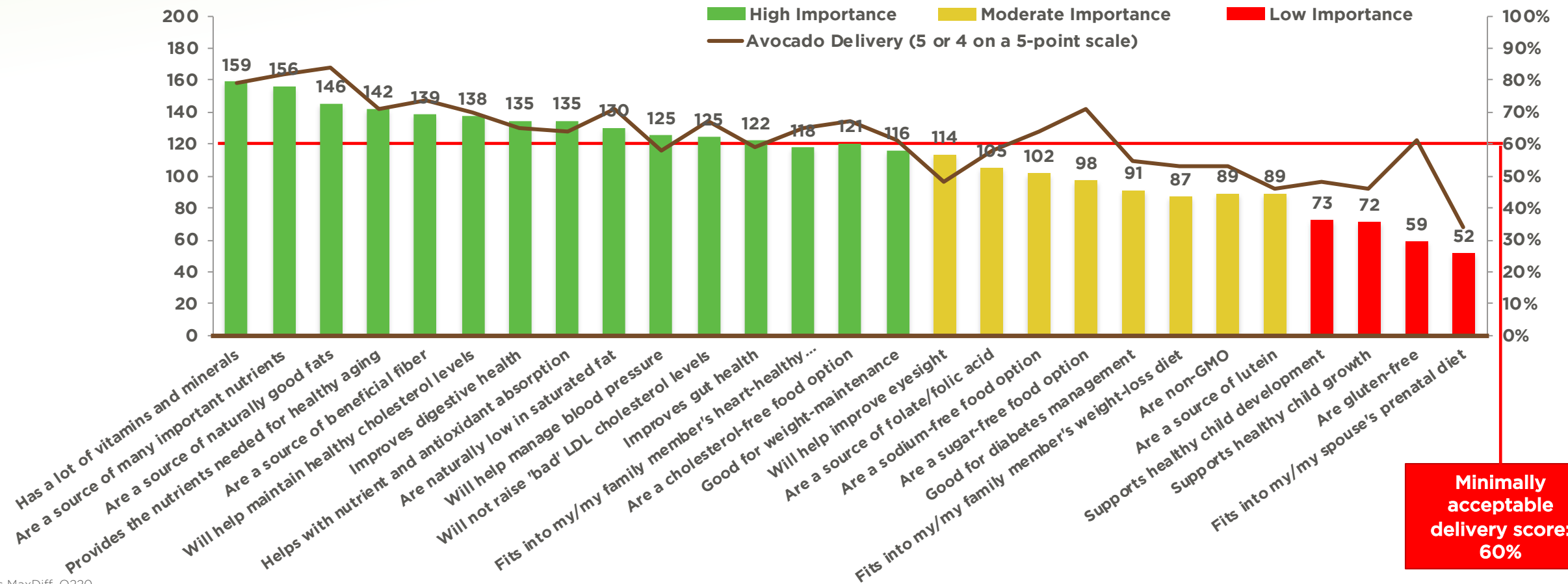
PERCEPTIONS OF AVOCADOS ARE REASONABLY STRONG AMONG LIGHT PURCHASERS FOR MOST OF THE HIGH IMPORTANCE ATTRIBUTES. THE SCORE NEEDS TO IMPROVE FOR HELPING MANAGE BLOOD PRESSURE, IMPROVING GUT HEALTH AND IMPROVES DIGESTIVE HEALTH.



Minimally acceptable delivery score: 60%

ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

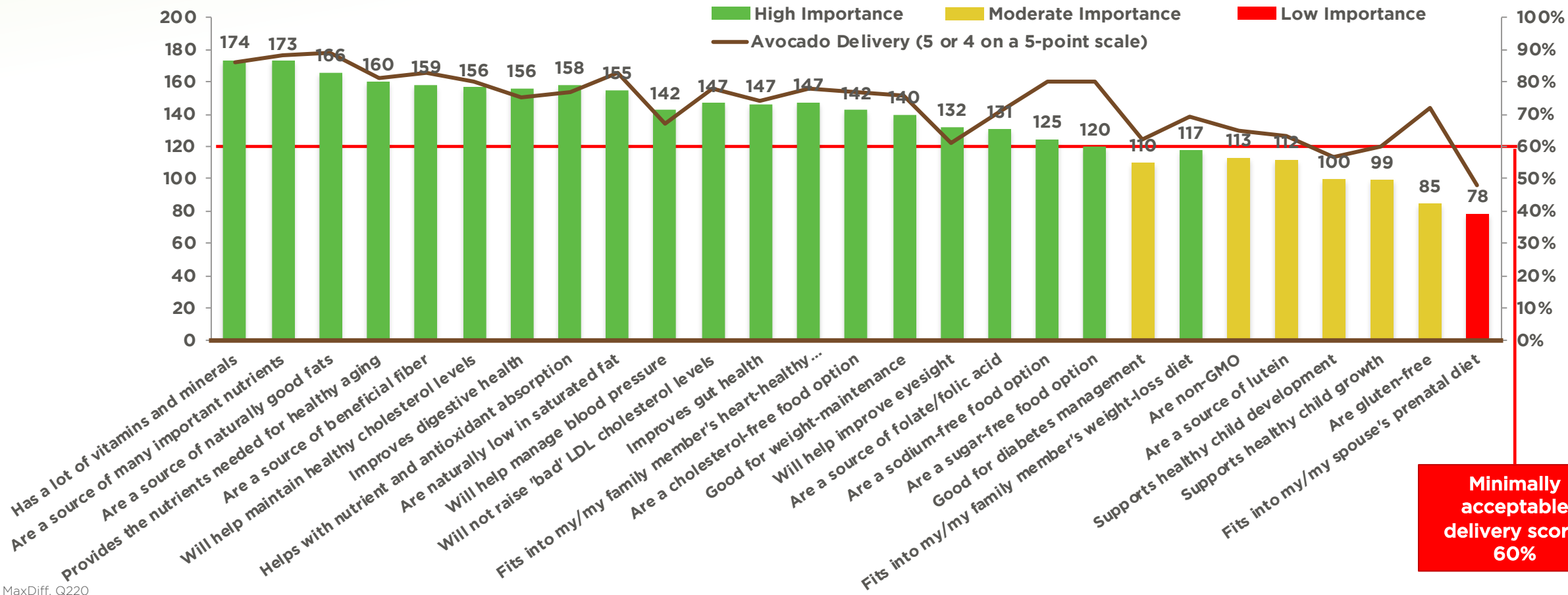
AVOCADOS DO REASONABLY WELL FOR THE MOST IMPORTANT ATTRIBUTES AMONG MEDIUM PURCHASERS. IMPROVEMENT IS NEEDED FOR HELPING TO IMPROVE EYESIGHT (WHICH DROPPED TO MODERATE IMPORTANCE THIS YEAR).



Minimally acceptable delivery score: 60%

ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

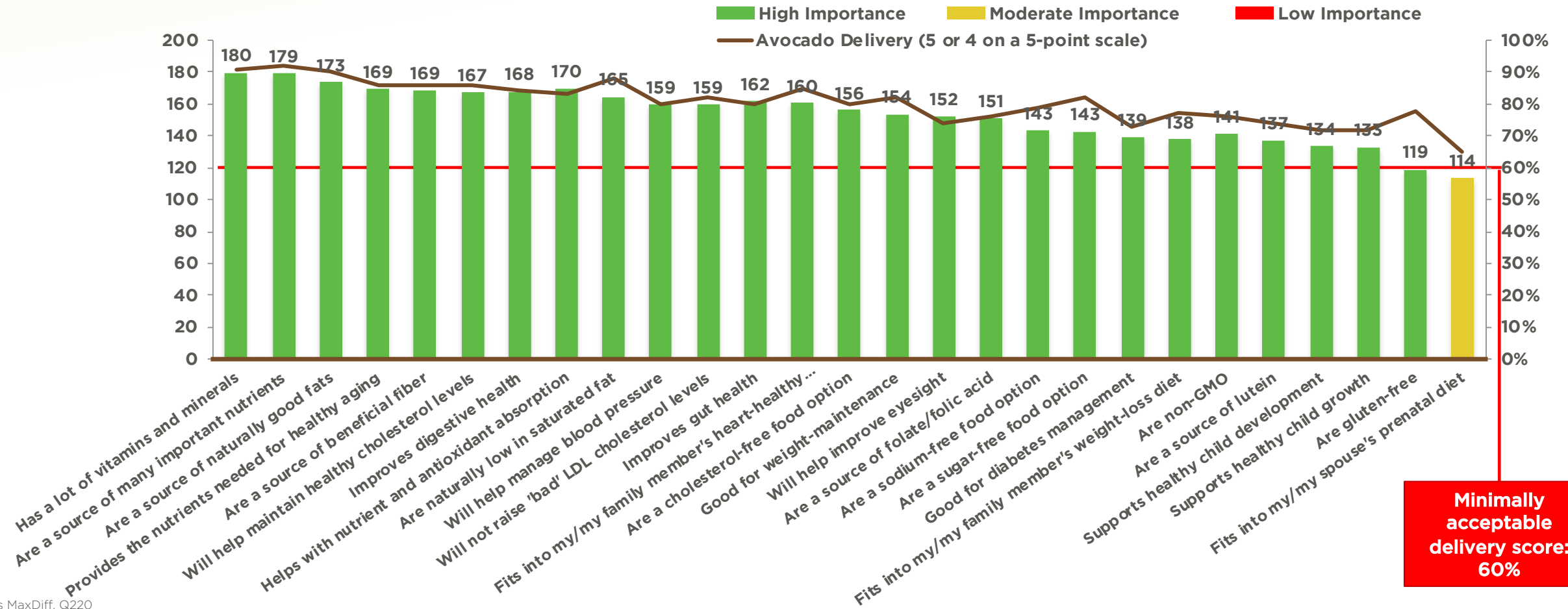
AVOCADOS DELIVER ON ALL OF THE MOST IMPORTANT ATTRIBUTES AMONG HEAVY AVOCADO PURCHASERS. MOST SCORES ARE SIMILAR TO LAST YEAR.



Minimally acceptable delivery score: 60%

ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

AVOCADOS SCORE EXTREMELY WELL ACROSS ALL OF THE IMPORTANT ATTRIBUTES AMONG SUPER HEAVY AVOCADO PURCHASERS. SCORES ARE SIMILAR TO LAST YEAR.



AVOCADO DELIVERY (5 OR 4 ON A 5-POINT SCALE)

AS AVOCADO PURCHASE LEVELS GO UP, SO DOES AGREEMENT WITH THE DESCRIPTIVE STATEMENTS FOR AVOCADOS.

HOWEVER, THERE IS ROOM FOR IMPROVEMENT. HIGHLIGHTED IN THE TABLE ARE THE ATTRIBUTES THAT ACHIEVE MINIMALLY ACCEPTABLE SCORES.

***Significantly down from 2018 across all purchaser groups except Super.**

Both statements changed to include family members in 2019.

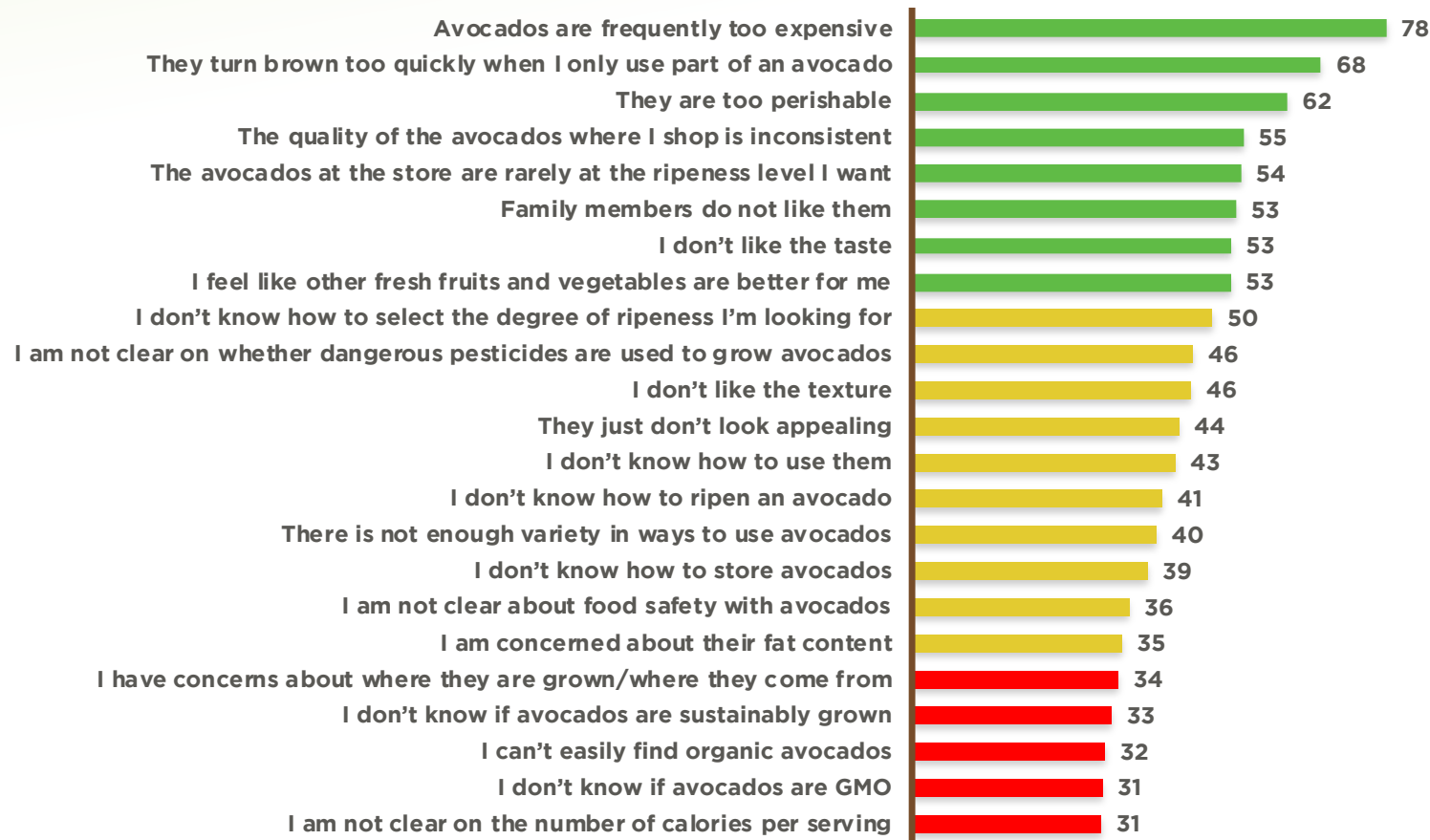
Remaining statements similar to 2018

	Total Sample %	Total Purchasers %	Non-Purchasers % A	Light % B	Medium % C	Heavy % D	Super Heavy % E
Are a source of naturally good fats	73	87	47	80A	84A	89ABC	90ABC
Are a source of many important nutrients	73	86	48	75A	82Ab	88ABC	92ABCd
Has a lot of vitamins and minerals	73	84	50	75A	79A	86ABC	91ABCD
Are a source of beneficial fiber	67	80	43	66A	74Ab	83ABC	86ABC
Are naturally low in saturated fat	67	79	44	68A	71A	83ABC	88ABCD
Provides the nutrients needed for healthy aging	65	78	40	66A	71A	81ABC	86ABCd
Will help maintain healthy cholesterol levels	64	77	39	62A	70AB	80ABC	86ABCD
Are a sugar-free food option	64	76	40	61A	71AB	80ABC	82ABC
Are a sodium-free food option	63	74	41	63A	64A	80ABC	79ABC
Will not raise 'bad' LDL cholesterol levels	62	75	37	68A	67A	78ABC	82ABCd
Helps with nutrient and antioxidant absorption	61	74	37	63A	64A	77ABC	83ABCD
Are a cholesterol-free food option	61	73	39	62A	67A	77ABC	80ABCd
Improves digestive health	61	73	37	57A	65Ab	75ABC	84ABCD
Fits into my/my family member's heart-healthy diet*	60	75	33	59A	65A	78ABC	85ABCD
Good for weight-maintenance	59	71	37	54A	61Ab	76ABC	82ABCD
Improves gut health	58	69	35	54A	59A	74ABC	80ABCD
Are gluten-free	57	69	35	49A	61AB	72ABC	78ABCD
Will help manage blood pressure	55	67	33	54A	58A	67ABC	80ABCD
Are a source of folate/folic acid	55	67	32	51A	58Ab	71ABC	76ABCd
Fits into my/my family member's weight-loss diet*	52	65	28	46A	53Ab	69ABC	77ABCD
Are non-GMO	52	64	31	49A	53A	65ABC	76ABCD
Good for diabetes management	51	62	30	46A	55AB	62ABC	73ABCD
Are a source of lutein	48	60	26	43A	46A	63ABC	74ABCD
Will help improve eyesight	48	59	27	40A	48Ab	61ABC	74ABCD

Q220 - To the best of your knowledge, how well does each of the following describe avocados? Please answer using a scale from 1 to 5 where a "1" means "Does not describe avocados at all" and a "5" means "Describes avocados perfectly."

BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

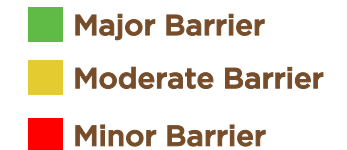
FREQUENTLY BEING TOO EXPENSIVE IS THE TOP BARRIER TO PURCHASING AVOCADOS. TURNING BROWN TOO QUICKLY WHEN PARTIALLY USED IS A STRONG SECONDARY BARRIER. BEING PERISHABLE, INCONSISTENT QUALITY, UNDESIRABLE RIPENESS LEVELS, FAMILY MEMBERS NOT LIKING THEM, NOT LIKING THE TASTE AND FEELING THAT OTHER FRUITS AND VEGETABLES ARE BETTER FOR YOU ARE ALSO STRONG BARRIERS.



Anchor: 100

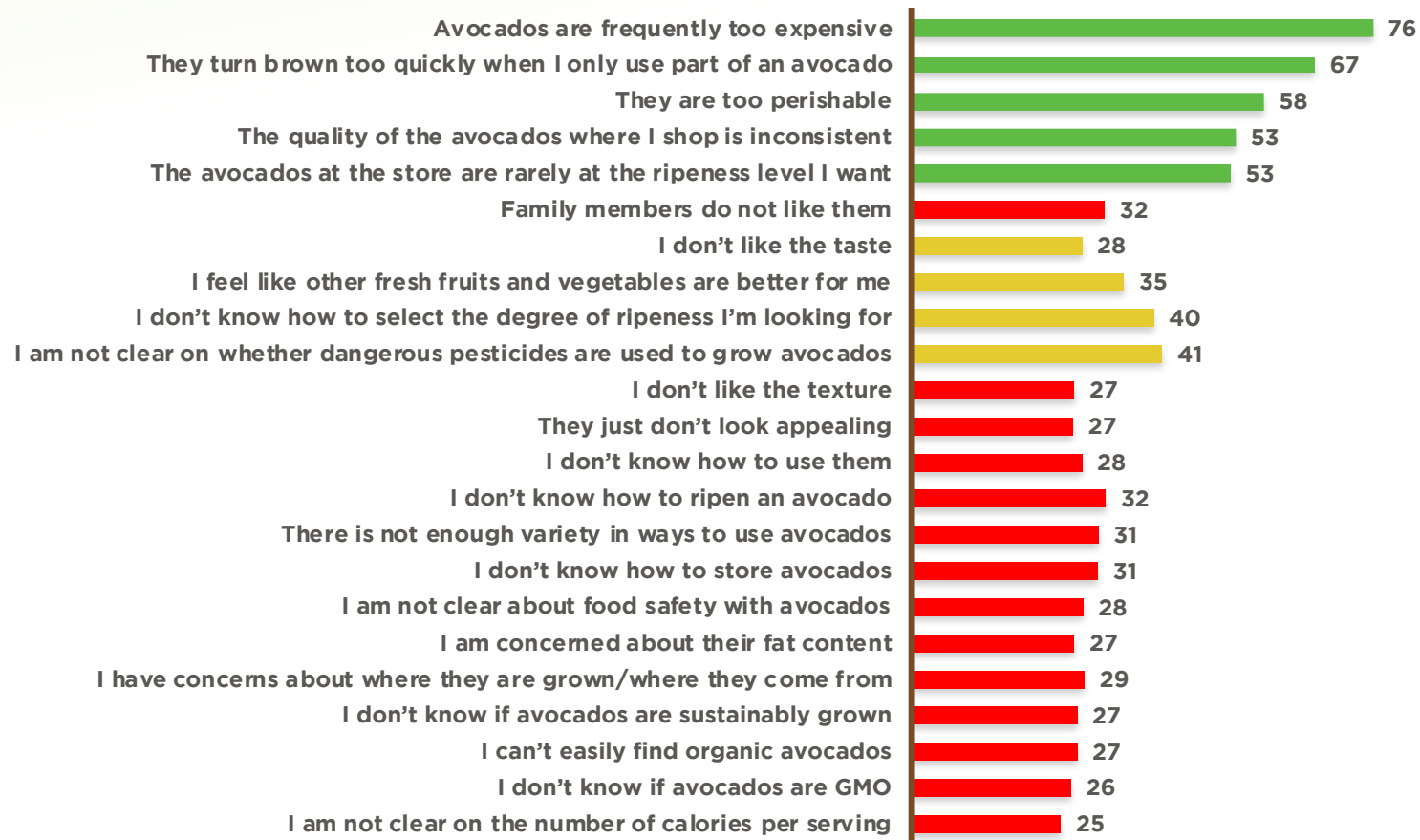
Results similar to 2018

Significant difference = 4 pts
Directional difference = 3 pts



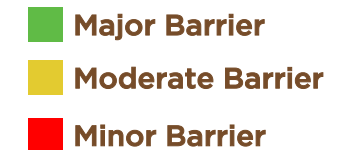
BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

FREQUENTLY BEING TOO EXPENSIVE IS THE TOP BARRIER AMONG TOTAL PURCHASERS. TURNING BROWN TOO QUICKLY WHEN PARTIALLY USED IS A STRONG SECONDARY BARRIER. BEING PERISHABLE, INCONSISTENT QUALITY AND UNDESIRABLE RIPENESS LEVELS ARE ALSO STRONG BARRIERS.



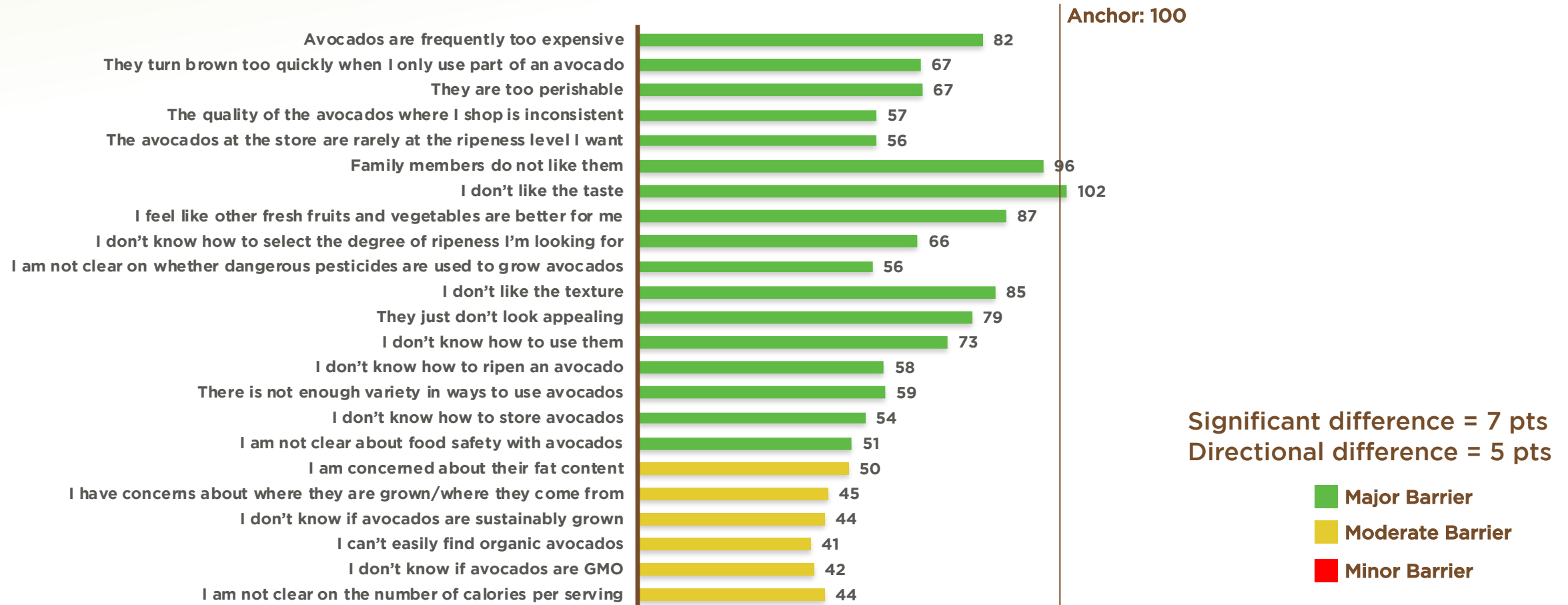
Anchor: 100

Significant difference = 5 pts
Directional difference = 3 pts



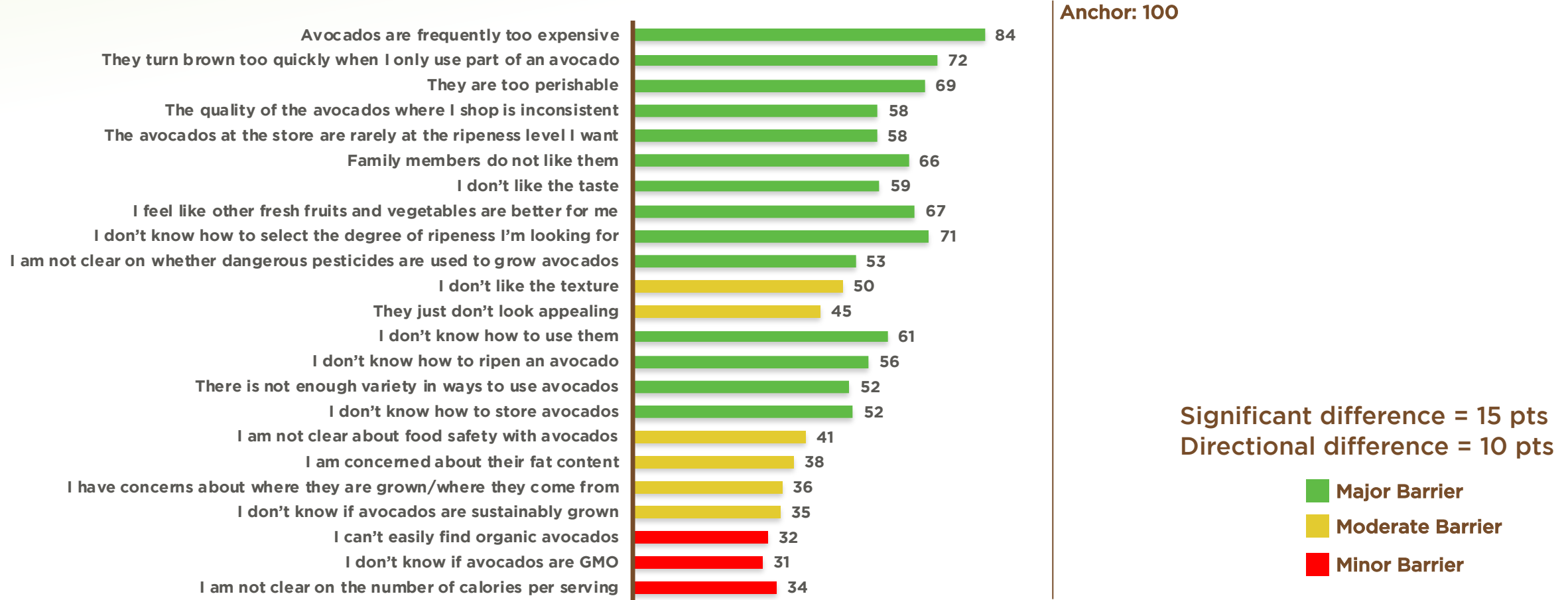
BARRIERS TO PURCHASING AVOCADOS

NOT LIKING THE TASTE OF AVOCADOS IS THE NUMBER ONE BARRIER FOR NON-PURCHASERS. THEY HAVE MANY OTHER STRONG BARRIERS; WITH FAMILY MEMBERS NOT LIKING THEM, FEELING OTHER FRUITS AND VEGETABLES ARE BETTER FOR YOU, NOT LIKING THE TEXTURE AND BEING TOO EXPENSIVE IN A STRONG SECOND TIER.



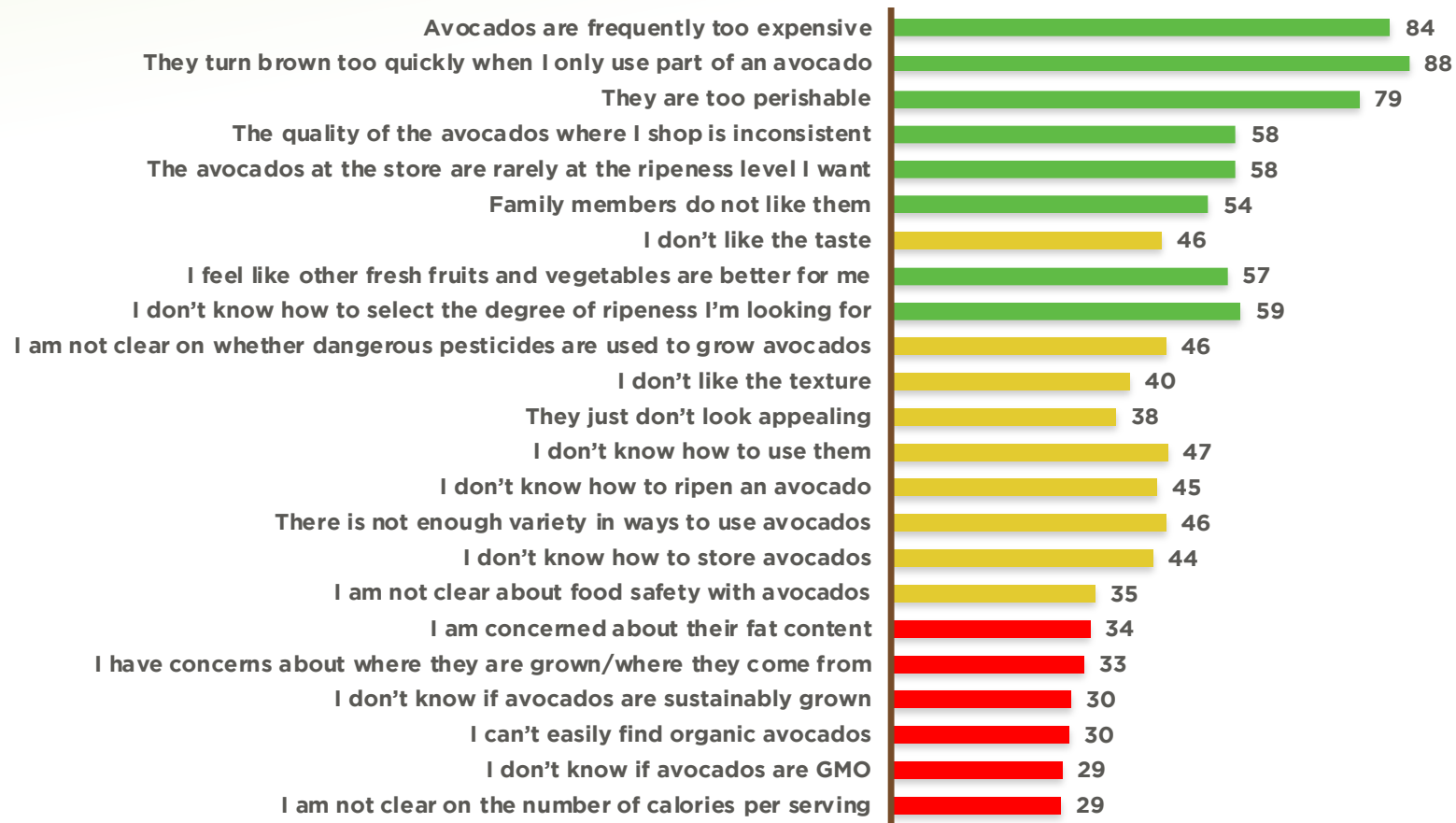
BARRIERS TO PURCHASING AVOCADOS

TASTE REMAINS A STRONG BARRIER AMONG NON-PURCHASERS WHO ORDER AVOCADOS AWAY FROM HOME - BUT WELL BELOW WHAT WE SEE AMONG TOTAL NON-PURCHASERS. IT COULD BE THAT THE TASTE IS CAMOUFLAGED IN DISHES THEY MAY ORDER SUCH AS GUACAMOLE.



BARRIERS TO PURCHASING AVOCADOS MORE OFTEN

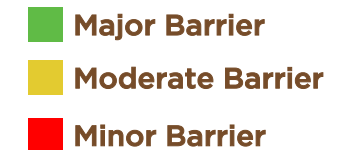
FREQUENTLY BEING TOO EXPENSIVE AND TURNING BROWN TOO QUICKLY ARE THE TOP BARRIERS FOR LIGHT PURCHASERS. BEING TOO PERISHABLE IS A STRONG SECONDARY BARRIER.



Anchor: 100

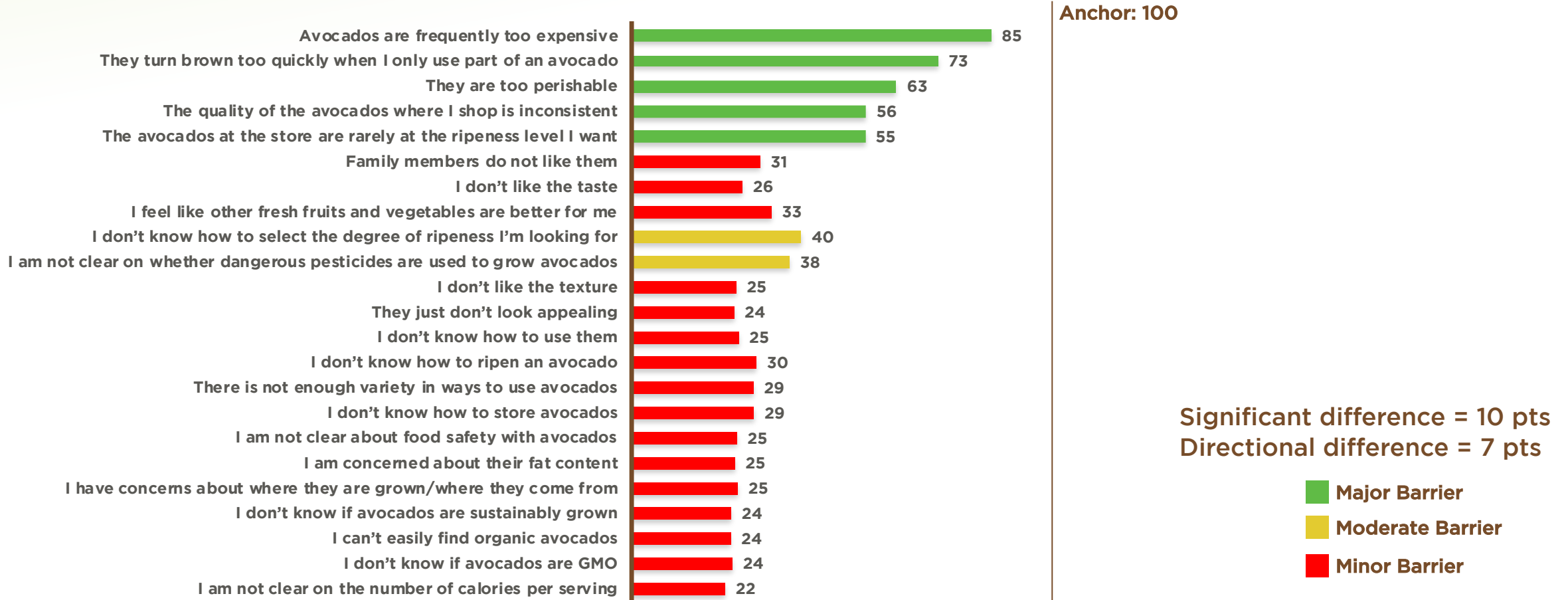
Expensive is down from 94
 Brown too quickly is up from 81
 Too perishable is up from 73

Significant difference = 14 pts
 Directional difference = 9 pts



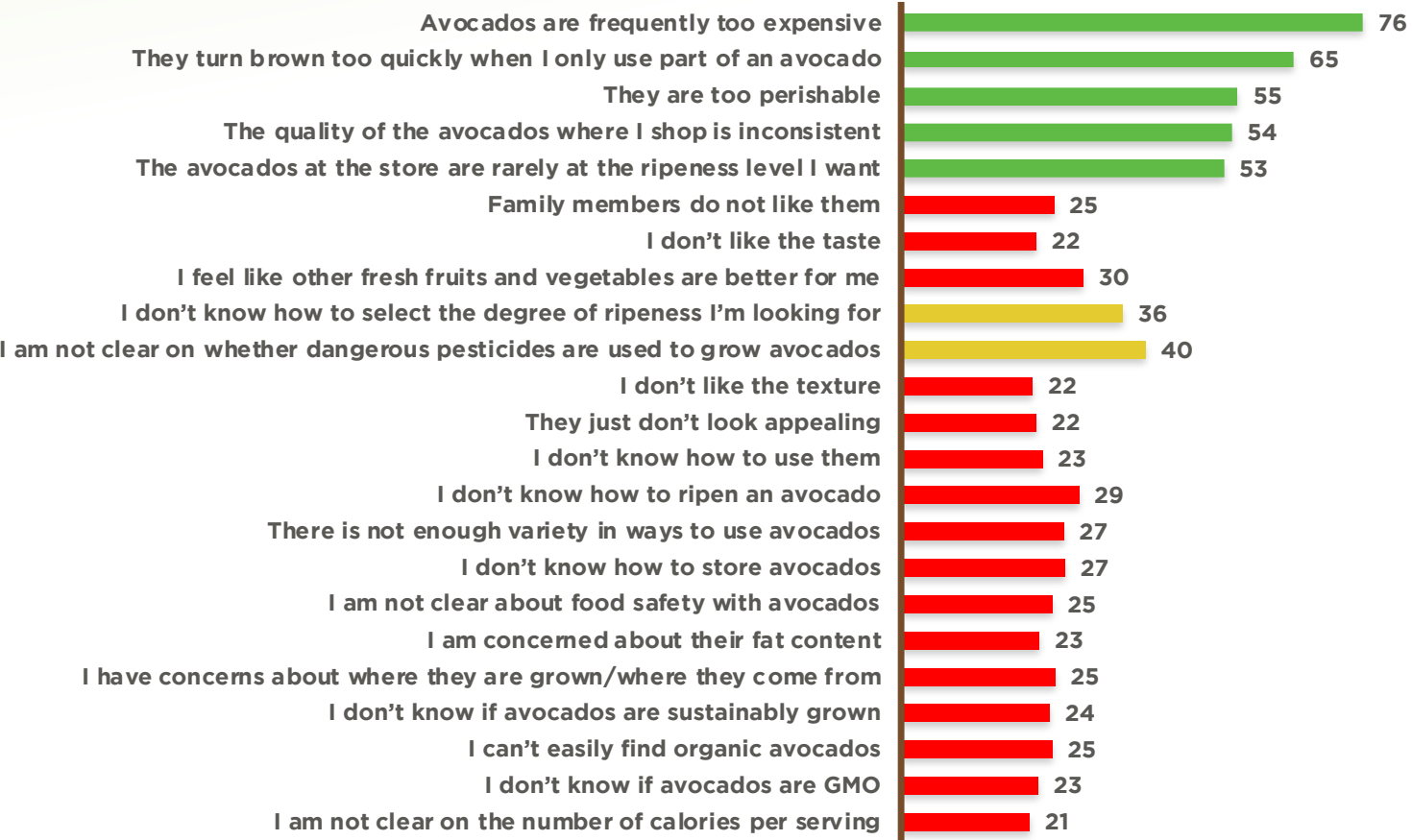
BARRIERS TO PURCHASING AVOCADOS MORE OFTEN

FREQUENTLY BEING TOO EXPENSIVE IS THE TOP BARRIER FOR MEDIUM PURCHASERS. TURNING BROWN TOO QUICKLY WHEN PARTIALLY USED IS ALSO A STRONG BARRIER.



BARRIERS TO PURCHASING AVOCADOS MORE OFTEN

FREQUENTLY BEING TOO EXPENSIVE IS ALSO THE TOP BARRIER FOR HEAVY PURCHASERS. TURNING BROWN TOO QUICKLY WHEN PARTIALLY USED IS ALSO A STRONG BARRIER.



Anchor: 100

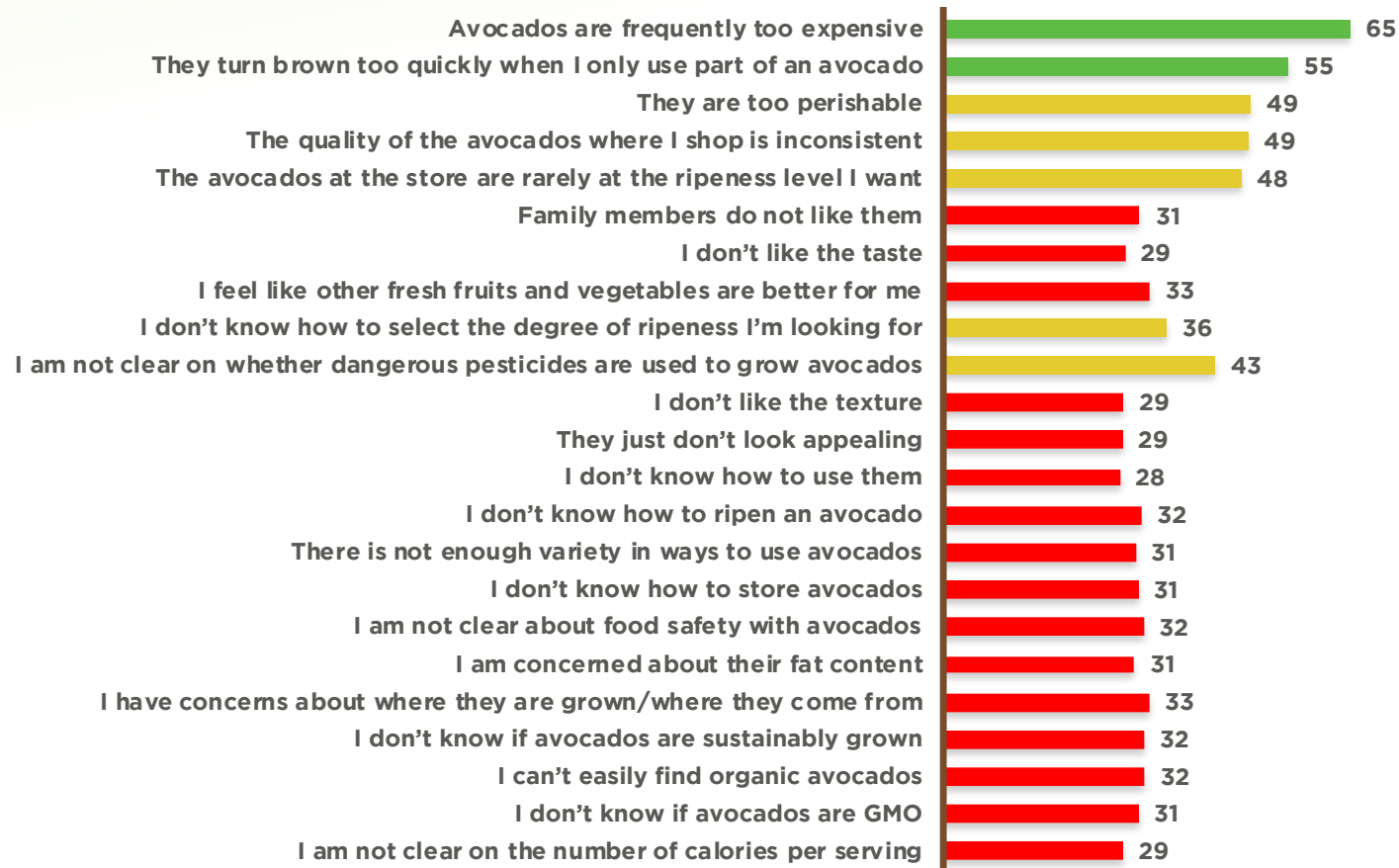
Brown too quickly is down from 71

Significant difference = 9 pts
Directional difference = 6 pts

- Major Barrier
- Moderate Barrier
- Minor Barrier

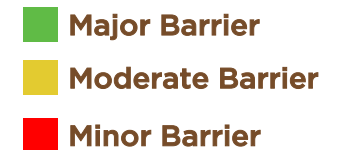
BARRIERS TO PURCHASING AVOCADOS MORE OFTEN

THE ONLY MAJOR BARRIERS FOR SUPER HEAVY PURCHASERS ARE FREQUENTLY BEING TOO EXPENSIVE AND TURNING BROWN TOO QUICKLY WHEN PARTIALLY USED.



Anchor: 100

Significant difference = 9 pts
Directional difference = 6 pts



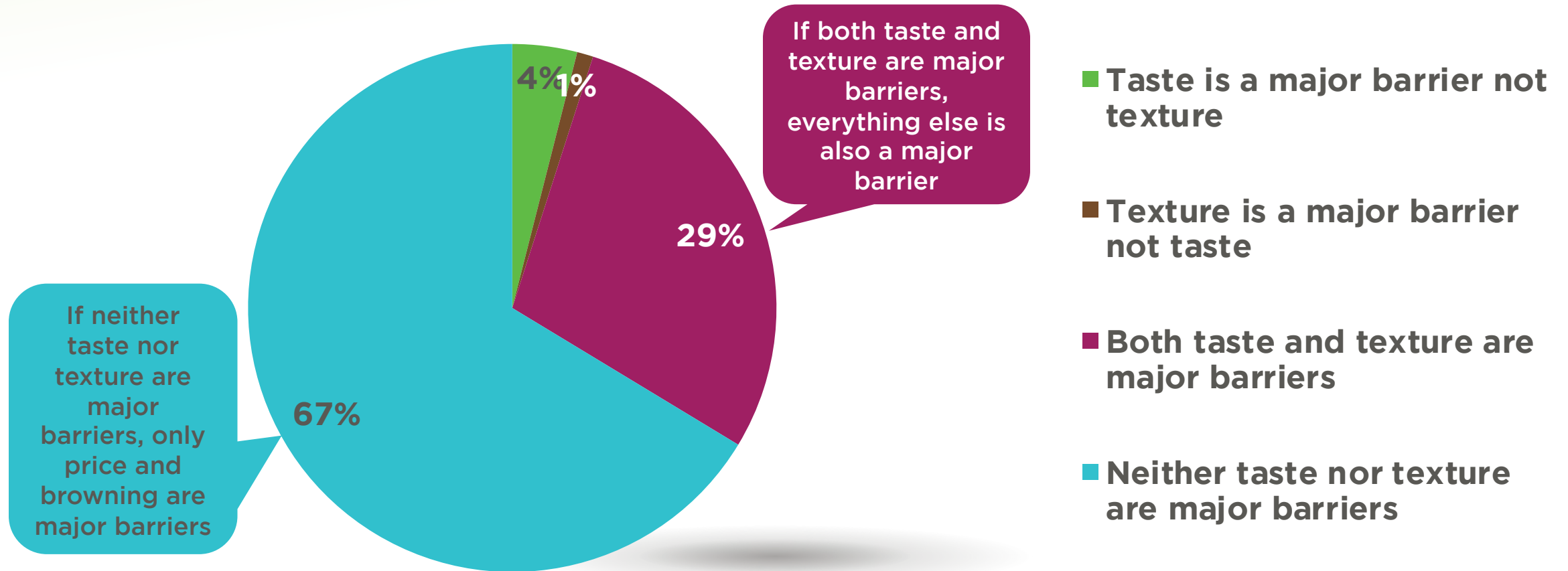
MAJOR BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

WHILE FREQUENTLY BEING TOO EXPENSIVE IS THE TOP BARRIER FOR ALL PURCHASER GROUPS, IT DOES DIMINISH AS AVOCADO PURCHASE LEVELS INCREASE. THE OTHER TOP BARRIERS OF TURNING BROWN TOO QUICKLY AND BEING TOO PERISHABLE ALSO DIMINISH AS PURCHASE LEVELS INCREASE.

	Total Sample	Total Purchasers	Non-Purchasers	Light	Medium	Heavy	Super Heavy
Avocados are frequently too expensive	78	76	82	84	85	76	65
They turn brown too quickly when I only use part of an avocado	68	67	67	88	73	65	55
They are too perishable	62	58	67	79	63	55	49
The quality of the avocados where I shop is inconsistent	55	53	57	58	56	54	49
The avocados at the store are rarely at the ripeness level I want	54	53	56	58	55	53	48
Family members do not like them	53	32	96	54	31	25	31
I don't like the taste	53	28	102	46	26	22	29
I feel like other fresh fruits and vegetables are better for me	53	35	87	57	33	30	33

TASTE AND TEXTURE AS BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

AS SEEN LAST YEAR, IF TASTE IS A BARRIER, THEN TEXTURE IS USUALLY ALSO A BARRIER. FOR THESE INDIVIDUALS, THEY CONSIDER EVERYTHING ELSE TO BE A BARRIER TO PURCHASING AVOCADOS. BOTTOM LINE, THEY ARE TELLING US THEY DO NOT LIKE AVOCADOS. IF A PERSON DOES NOT CONSIDER TASTE OR TEXTURE TO BE A BARRIER, THEN THE ONLY OTHER MAJOR BARRIERS ARE PRICE AND TURNING BROWN TOO QUICKLY.



COMMUNICATIONS

freshavocados

LOVE
ONE TODAY[®]

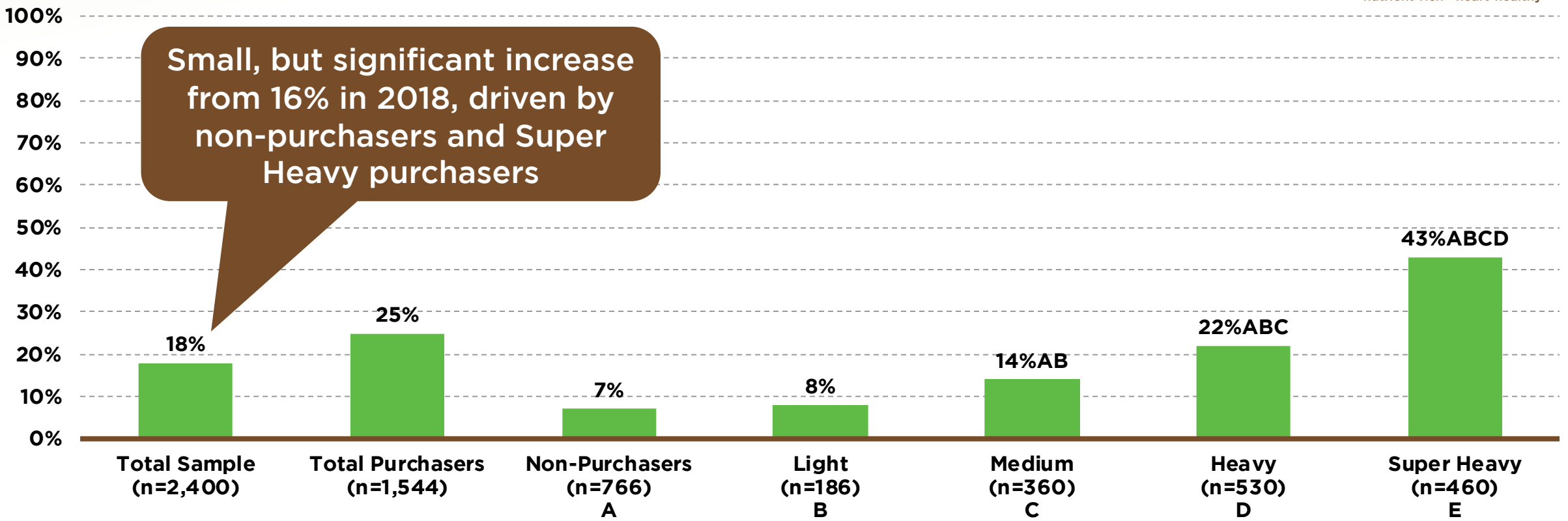
nutrient-dense • heart-healthy

SEEN “LOVE ONE TODAY” LOGO IN PAST YEAR

WHILE THERE IS AMPLE OPPORTUNITY TO GROW AWARENESS OF THE “LOVE ONE TODAY” LOGO, IT DOES IMPROVE AS AVOCADO PURCHASE LEVELS INCREASE.



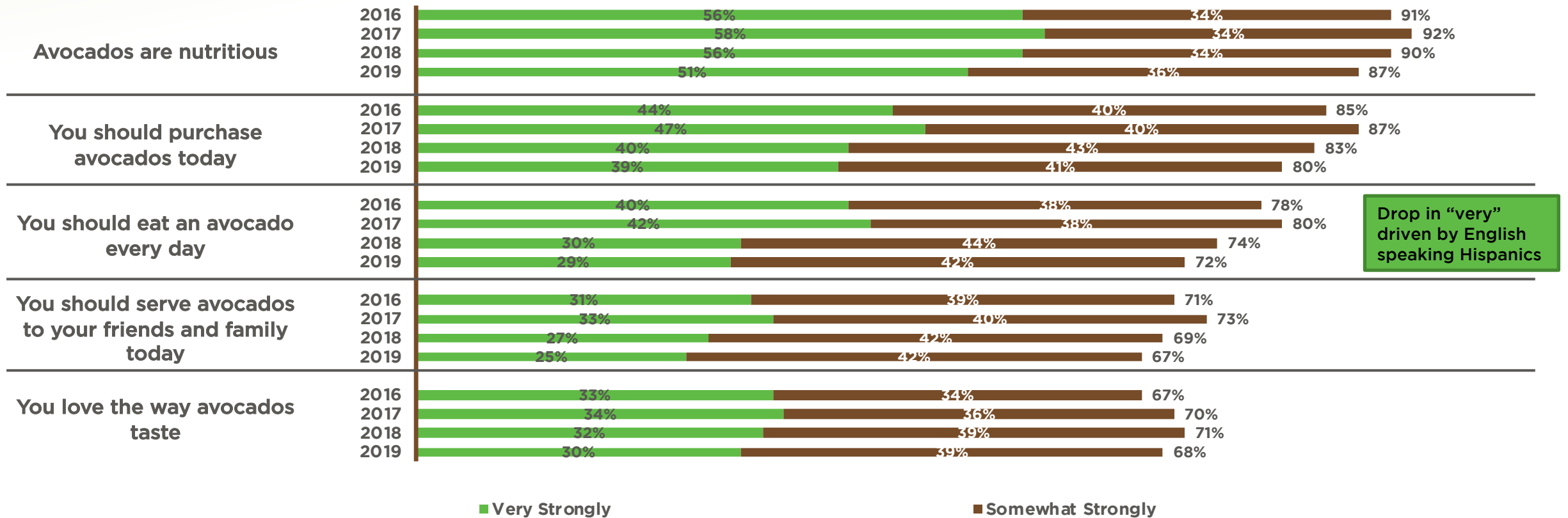
Small, but significant increase from 16% in 2018, driven by non-purchasers and Super Heavy purchasers



Q400 - In the past year have you seen the following logo, for example, in grocery stores, magazines, newspapers, email or online/social media?

STATEMENTS LOGO COMMUNICATED (TOTAL SAMPLE)

MESSAGES COMMUNICATED BY THE LOGO HAVE REMAINED FAIRLY CONSISTENT OVER TIME. THE ONLY MAJOR DIFFERENCE IS A DECREASE FOR “YOU SHOULD EAT AN AVOCADO EVERYDAY”.



Q420 - How strongly does this logo [IF HISPANIC PANEL: “do these logos”] communicate to you personally that...?

STATEMENTS LOGO COMMUNICATED (2019 ONLY) (VERY/SOMEWHAT STRONGLY)

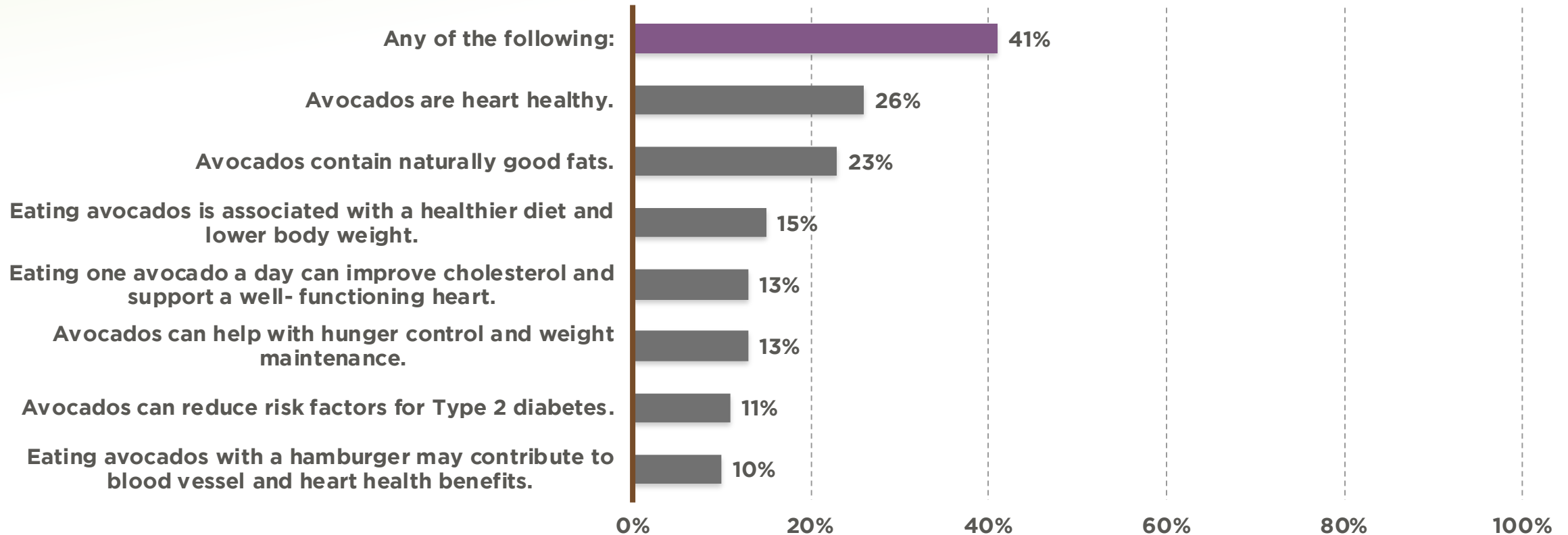
MESSAGES COMMUNICATED GENERALLY INCREASE AS AVOCADO PURCHASE LEVELS INCREASE.

	Total Purchasers (n=1,544) %	Non-Purchasers (n=766) % A	Light (n=186) % B	Medium (n=360) % C	Heavy (n=530) % D	Super Heavy (n=460) % E
Avocados are nutritious	93	76	85A	94AB	93AB	96ABcD
You should purchase avocados today	88	64	78A	85Ab	91ABC	93ABC
You should eat an avocado every day	81	55	65A	70A	83ABC	93ABCD
You should serve avocados to your friends and family today	76	49	61A	68AB	78ABC	87ABCD
You love the way avocados taste	79	47	69A	72A	80ABC	89ABCD

Q420 - How strongly does this logo [IF HISPANIC PANEL: "do these logos"] communicate to you personally that...?

STATEMENTS ABOUT AVOCADO HEALTH BENEFITS SEEN OR HEARD IN PAST FEW MONTHS (TOTAL SAMPLE)

MESSAGES ABOUT HEART HEALTH AND NATURALLY GOOD FATS ARE MOST COMMONLY RECALLED ABOUT AVOCADOS.



Q430 - In the past few months, have you read a magazine, newspaper or website article and/or seen a segment on television related to the following health related benefits of eating avocados?

STATEMENTS ABOUT AVOCADO HEALTH BENEFITS SEEN OR HEARD IN PAST FEW MONTHS (TOTAL SAMPLE)

MESSAGES ABOUT HEART HEALTH AND NATURALLY GOOD FATS ARE MOST COMMONLY RECALLED ABOUT AVOCADOS.

	2018 (n=2,400) % A	2019 (n=2,400) % B
Any of the following:	43	41
Avocados are heart healthy.	27b	26
Avocados contain naturally good fats.	25b	23
Eating avocados is associated with a healthier diet and lower body weight.	17B	15
Eating one avocado a day can improve cholesterol and support a well- functioning heart.	15b	13
Avocados can help with hunger control and weight maintenance.	14	13
Avocados can reduce risk factors for Type 2 diabetes.	12	11
Eating avocados with a hamburger may contribute to blood vessel and heart health benefits.	11b	10

Small but significant drop driven by Super Heavy purchasers

Q430 - In the past few months, have you read a magazine, newspaper or website article and/or seen a segment on television related to the following health related benefits of eating avocados?

STATEMENTS ABOUT AVOCADO HEALTH BENEFITS SEEN OR HEARD IN PAST FEW MONTHS

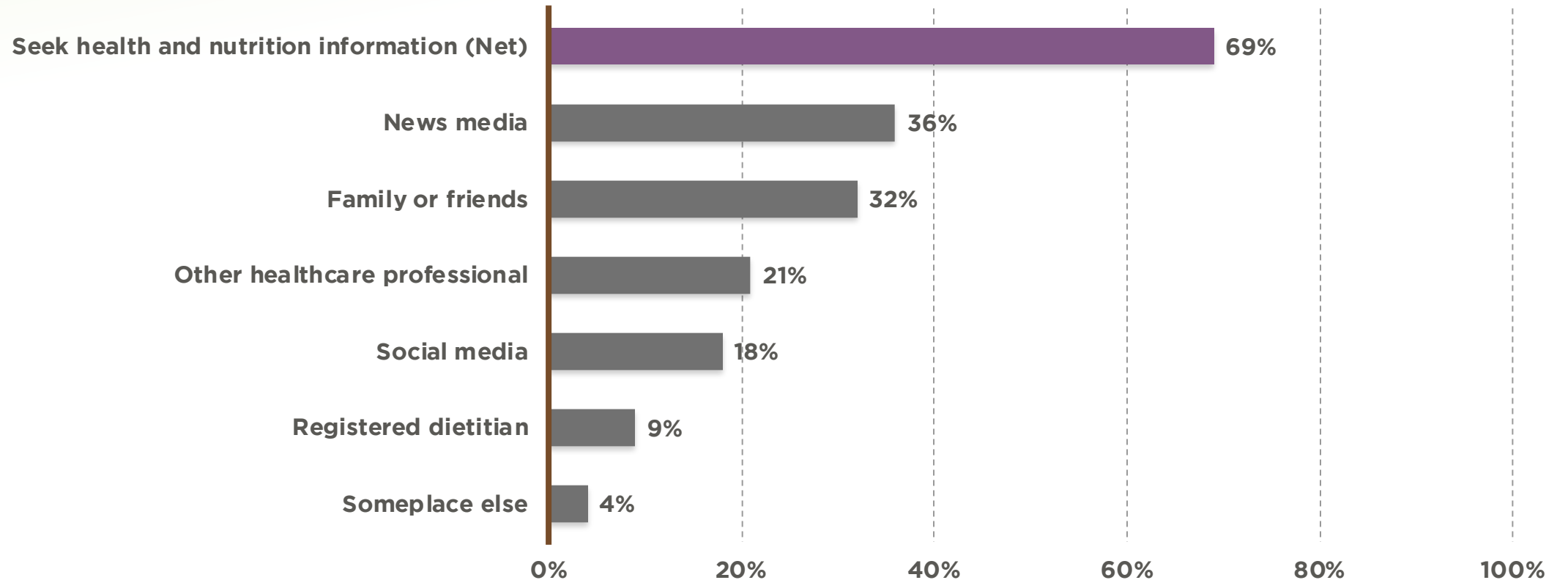
AS AVOCADO PURCHASES INCREASE, SO DOES RECALL OF THE VARIOUS HEALTH MESSAGES ABOUT AVOCADOS.

	Total Purchasers (n=1,544) %	Non-Purchasers (n=766) % A	Light (n=186) % B	Medium (n=360) % C	Heavy (n=530) % D	Super Heavy (n=460) % E
Any of the following:	52	20	32A	40Ab	51ABC	71ABCD
Avocados are heart healthy.	32	13	20A	25Ab	32ABC	43ABCD
Avocados contain naturally good fats.	29	10	20A	25Ab	28AB	39ABCD
Eating avocados is associated with a healthier diet and lower body weight.	20	6	9	14Ab	19ABC	29ABCD
Eating one avocado a day can improve cholesterol and support a well- functioning heart.	17	5	6	8A	17ABC	30ABCD
Avocados can help with hunger control and weight maintenance.	17	5	6	12AB	15ABc	28ABCD
Avocados can reduce risk factors for Type 2 diabetes.	15	4	4	9AB	12ABc	26ABCD
Eating avocados with a hamburger may contribute to blood vessel and heart health benefits.	13	3	5	7A	12ABC	21ABCD

Q430 - In the past few months, have you read a magazine, newspaper or website article and/or seen a segment on television related to the following health related benefits of eating avocados?

WHERE HEALTH AND NUTRITION INFORMATION IS TYPICALLY FOUND (TOTAL SAMPLE)

THE NEWS MEDIA AND FAMILY AND FRIENDS ARE THE TOP SOURCES OF HEALTH AND NUTRITION INFORMATION.



Q440 - Where do you typically get your health and nutrition information about your diet and lifestyle?

WHERE HEALTH AND NUTRITION INFORMATION IS TYPICALLY FOUND

THERE IS A CORRELATION WITH INCREASED AVOCADO PURCHASES AND SEEKING HEALTH AND NUTRITION INFORMATION.

	Total Purchasers (n=1,544) %	Non-Purchasers (n=766) % A	Light (n=186) % B	Medium (n=360) % C	Heavy (n=530) % D	Super Heavy (n=460) % E
Seek health and nutrition information (Net)	75	57	65a	70Ab	75ABc	85ABCD
News media	40	28	34a	36A	40Ab	47ABCD
Family or friends	36	25	29	30a	34Abc	46ABCD
Other healthcare professional	22	19	18	22	22	23ab
Social media	22	10	12	14a	18ABc	36ABCD
Registered dietitian	11	4	4	7ab	11ABC	19ABCD
Someplace else	5	4	6ae	6e	4	3

Q440 - Where do you typically get your health and nutrition information about your diet and lifestyle?

STATEMENTS ABOUT AVOCADO HEALTH BENEFITS SEEN OR HEARD IN PAST FEW MONTHS

REGISTERED DIETITIANS AND SOCIAL MEDIA ARE THE STRONGEST SOURCES OF HEALTH AND NUTRITION MESSAGING

Health and nutrition information is typically found from:	Registered Dietitian	Other Healthcare Professional	Social Media	News Media	Family or Friends	Someplace Else
	(n=218) % A	(n=502) % B	(n=423) % C	(n=870) % D	(n=773) % E	(n=103) % F
Any of the following:	69BDEF	46F	69BDEF	57BeF	54BF	34
Avocados are heart healthy.	45BDEF	32F	46BDEF	38BEF	34F	21
Avocados contain naturally good fats.	37BeF	27	37BEF	37BEF	32Bf	24
Eating avocados is associated with a healthier diet and lower body weight.	30BDEF	21	30BDEF	23ef	21	17
Eating one avocado a day can improve cholesterol and support a well- functioning heart.	33BCDEF	17f	26BDEF	19bF	19bF	12
Avocados can help with hunger control and weight maintenance.	28BDEF	18f	28BDEF	19F	20F	12
Avocados can reduce risk factors for Type 2 diabetes.	27BDEF	17F	28BDEF	16F	17F	7
Eating avocados with a hamburger may contribute to blood vessel and heart health benefits.	27BcDEF	14F	22BDEF	13F	14F	7

Q430 - In the past few months, have you read a magazine, newspaper or website article and/or seen a segment on television related to the following health related benefits of eating avocados?

fresh **avocados**

LOVE
ONE TODAY[®]

nutrient-dense • heart-healthy

THANK YOU