



## AVOCADOS TRACKING 2021 | GENERAL SAMPLE SEGMENT REPORT

# AGENDA

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# INTRODUCTION

# 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 last 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 delineated on following slide.

## How Many and When:

2,400 surveys completed per wave

2018: July 6<sup>th</sup> – 17<sup>th</sup>, 2018

2019: May 8<sup>th</sup> – 22<sup>nd</sup>, 2019

2021: May 26<sup>th</sup> – Jun 9<sup>th</sup>, 2021

## 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

# WHAT'S NEW IN 2021

While most results are similar to 2019, there were some changes:

- The proportion of households purchasing avocados is up from 64% to 72%.
- The proportion of households falling into each of the health pillars is up.
- Using avocados for a snack and for breakfast are up while usage for lunch and dinner are both down slightly.
- Avocados are being used in more different ways.
- Agreement with all of the reasons for purchasing avocados is up.
- Agreement with most health and nutrition importance statements is up and avocados' association with these benefits is mostly up.
- Pesticide concerns moved into the major barrier to purchasing avocados group – driven by non-purchasers.
- Many barriers to purchasing avocados, while below thresholds of concern, increased among both heavy and super purchasers.
- Awareness of “Love One Today” has increased.

# EXECUTIVE SUMMARY

## Purchaser Segments

- The proportion of avocado purchasers has increased over the years. Likely Covid related, there was a general increase in avocado consumption across all households – meaning light and medium purchasers account for a larger share of total avocado consumption than typically seen. But heavy and super purchasers still drive overall volume.
- 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.



# EXECUTIVE SUMMARY (CONT.)

## Avocado Usage

- Dinner remains the most common meal occasion for using avocados, but lunch is in a strong second place. Usage for a snack and for breakfast is growing.
- The usage of avocados by other household members is generally correlated with the presence of these household members.
- 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, being nutrient dense and 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.
  - 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 nutrient dense, being a source of naturally good fats, 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 mostly acceptable among light purchasers.
  - Once you are a medium user, avocados perform well and continue to see better scores as usage increases.

# 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, not understanding or undesirable ripeness levels, not liking the taste, and feeling that other fruits and vegetables are better for you are also strong barriers. Pesticides moved into the major barrier group.



# EXECUTIVE SUMMARY (CONT.)

## Communication

- 31% of all respondents claim to have seen “Love One Today” within the past year. This is a significant increase from the 18% seen in 2019.
  - This ranges from a low of 10% among non-purchasers to a high of 57% among super heavy purchasers.
  - Message communication associated with the logo has stayed fairly consistent over time.
    - Messages communicated generally increase as avocado purchase levels increase.
- When it comes to the media, messages about many uses, heart health, a good meal or snack option and boosting immunity 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

# NON-PURCHASERS: 28% 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, not liking the texture and frequently being too expensive.
- 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: 21% OF GENERAL SAMPLE

- The skew heavily toward occasional avocado purchasers.
- Their use of avocados across meal occasions falls below other segments. This is especially true for breakfast and parties/special occasions.
- They are less committal than seen overall in terms of reasons for purchasing avocados. In fact, only three reasons fall above typically acceptable minimums: being healthy, contain “good” fats and like the taste.
- 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.



# MEDIUM PURCHASERS: 19% OF GENERAL SAMPLE

- They are a mixture of special occasion, occasional and regular purchasers.
- 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.

# HEAVY PURCHASERS: 17% OF GENERAL SAMPLE

- They are mostly a mixture of special occasion and regular avocado purchasers.
- They use avocados for more meal occasions than average, but generally fall somewhat 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 skew more male and have a strong skew toward ages 25-44. Along with super heavy purchasers, they have a slight Hispanic skew. Their households are larger than light and medium purchasers. They are tied with super heavy purchasers for the largest household income. Along with super heavy users, they have a geographic skew to the west.

## SUPER HEAVY PURCHASERS: 21% OF GENERAL SAMPLE

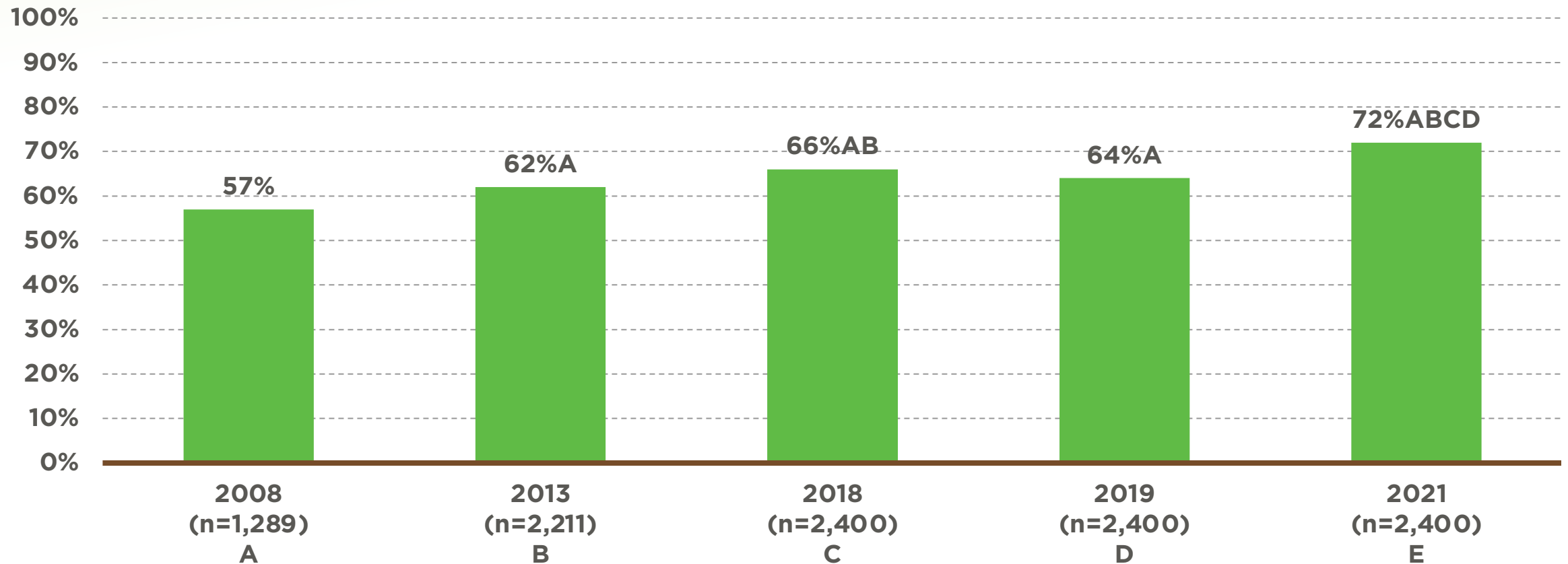
- They are mostly a mixture of special occasion and regular avocado purchasers.
- They use avocados for more meal occasions than seen across all other segments. Of particular notice, half of them use avocados for breakfast. They use avocados in more ways than seen for all other segments. Many of them 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, turning brown too quickly, being perishable and not desired ripeness level.
- Super heavy purchasers also skew more male. They have a strong skew toward ages 25-44. Along with heavy purchasers, they have slight a Hispanic skew. They are the most racially diverse segment. Along with heavy users, they have the largest households of all segments and are more 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 are tied with heavy purchasers for the highest household income. Along with heavy users, they have a geographic skew to the west.

# AVOCADO PURCHASER SEGMENTS



# PURCHASED AVOCADOS IN PAST YEAR

THE PROPORTION OF AVOCADO PURCHASERS FOR HOUSEHOLD USE HAS INCREASED OVER THE YEARS. LIKELY DRIVEN BY COVID, WE SAW A LARGE INCREASE IN HOUSEHOLD PENETRATION FOR AVOCADOS THIS YEAR.



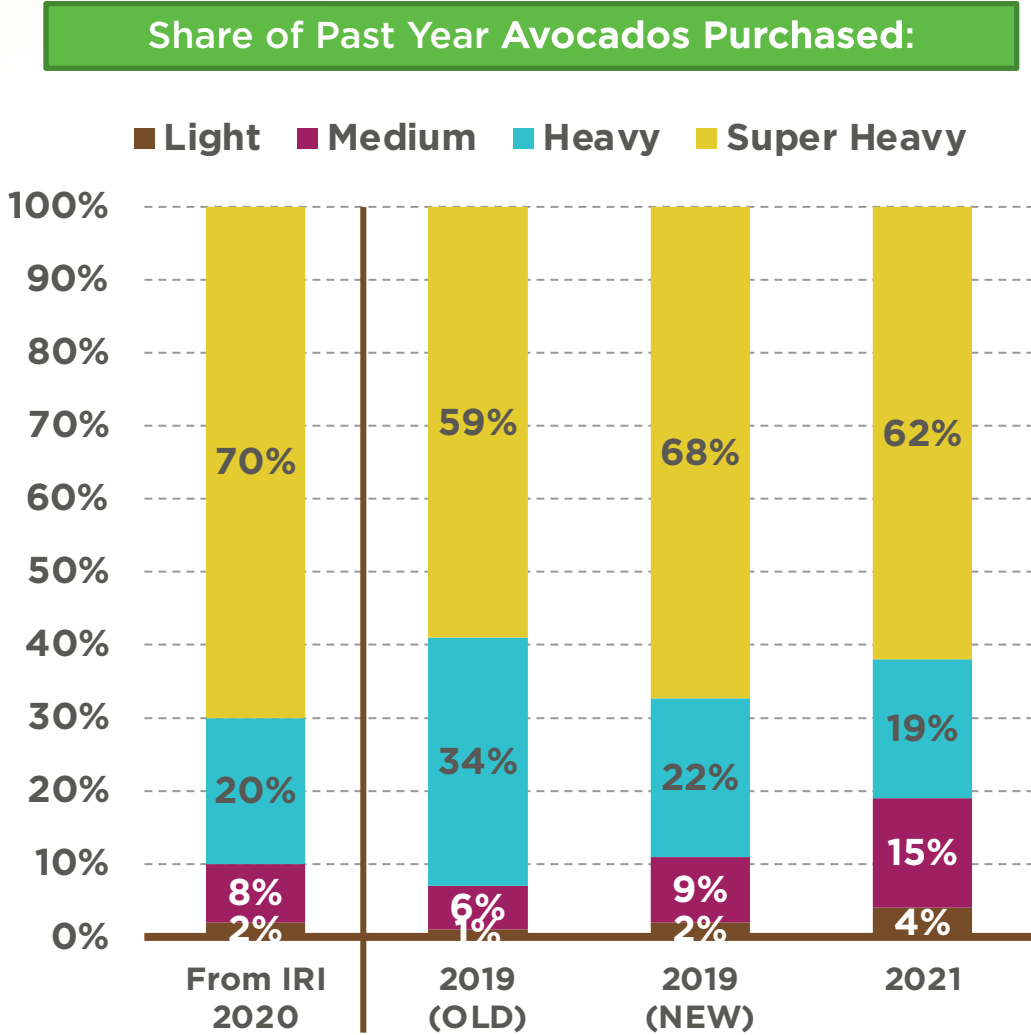
NOTE: earlier years reported in 5 year increments for ease in reading the chart

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?

# AVOCADO PURCHASE GROUPS (AVOCADOS AND NOT PEOPLE)

Revised 2019 and 2021 definitions were derived from IRI calculated share of avocados purchased by each segment. The goal was to match IRI shares.

Because household purchase of avocados increased in 2021, we made adjustments which resulted in slightly more share derived from Light and Medium purchasers.



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?

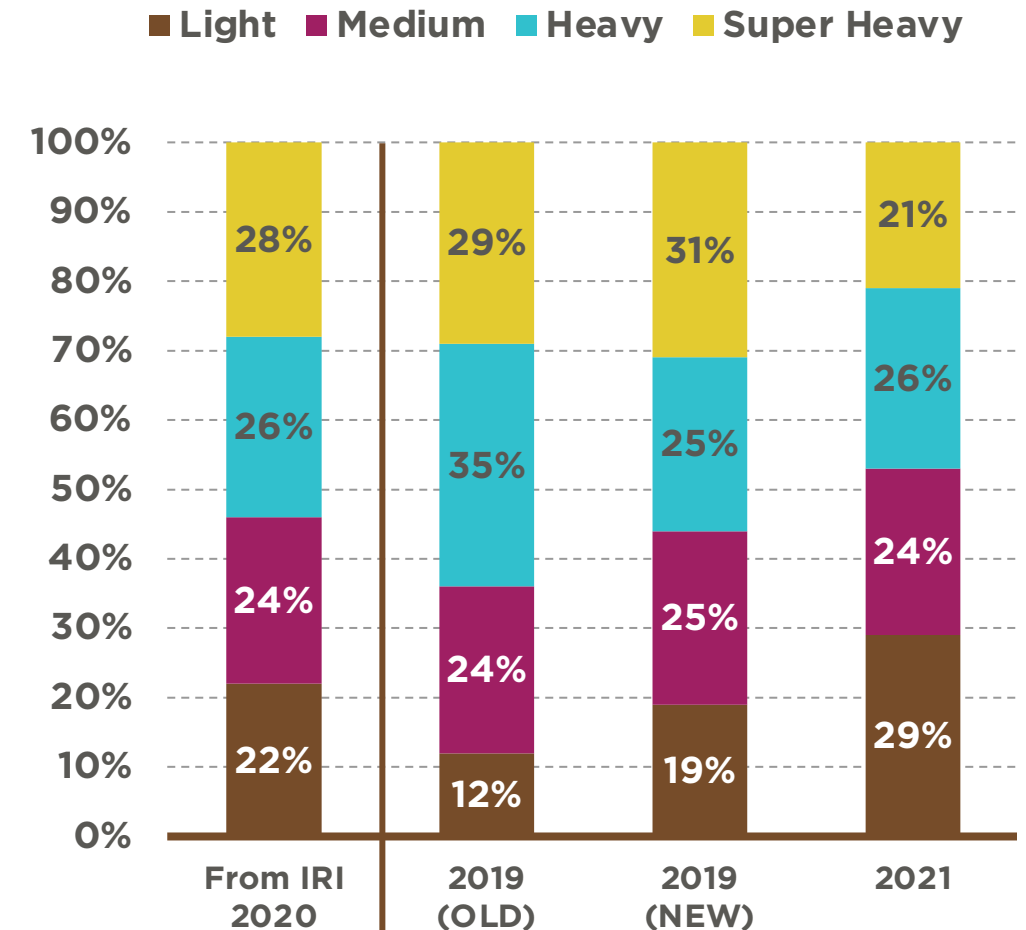
# AVOCADO SEGMENT COMPOSITION (PEOPLE NOT AVOCADOS)

THE RECALCULATED SEGMENT DEFINITIONS (BASED ON SHARE OF AVOCADO PURCHASES AS SHOWN ON THE PREVIOUS SLIDE) WERE NEXT CONVERTED TO AVOCADO PURCHASERS (PEOPLE, NOT AVOCADOS).

THE REVISED 2019 SHARES ARE VERY SIMILAR TO IRI.

LIKELY DRIVEN BY COVID, WE SAW INCREASED AVOCADO PURCHASE FOR HOME USE IN 2020/2021. THE INCREASED PURCHASE WAS SEEN ACROSS SEGMENTS, BUT IT WAS PROPORTIONALLY STRONGER AMONG LIGHT AND MEDIUM PURCHASERS (SMALLER PURCHASE QUANTITIES CAN SEE LARGER PROPORTIONAL INCREASES THAN LARGER PURCHASE QUANTITIES). THIS MEANS LIGHT AND MEDIUM PURCHASERS SHIFTED FROM ACCOUNTING FOR SOMEWHAT LESS THAN HALF OF ALL PURCHASERS TO NOW ACCOUNTING FOR SOMEWHAT MORE THAN HALF.

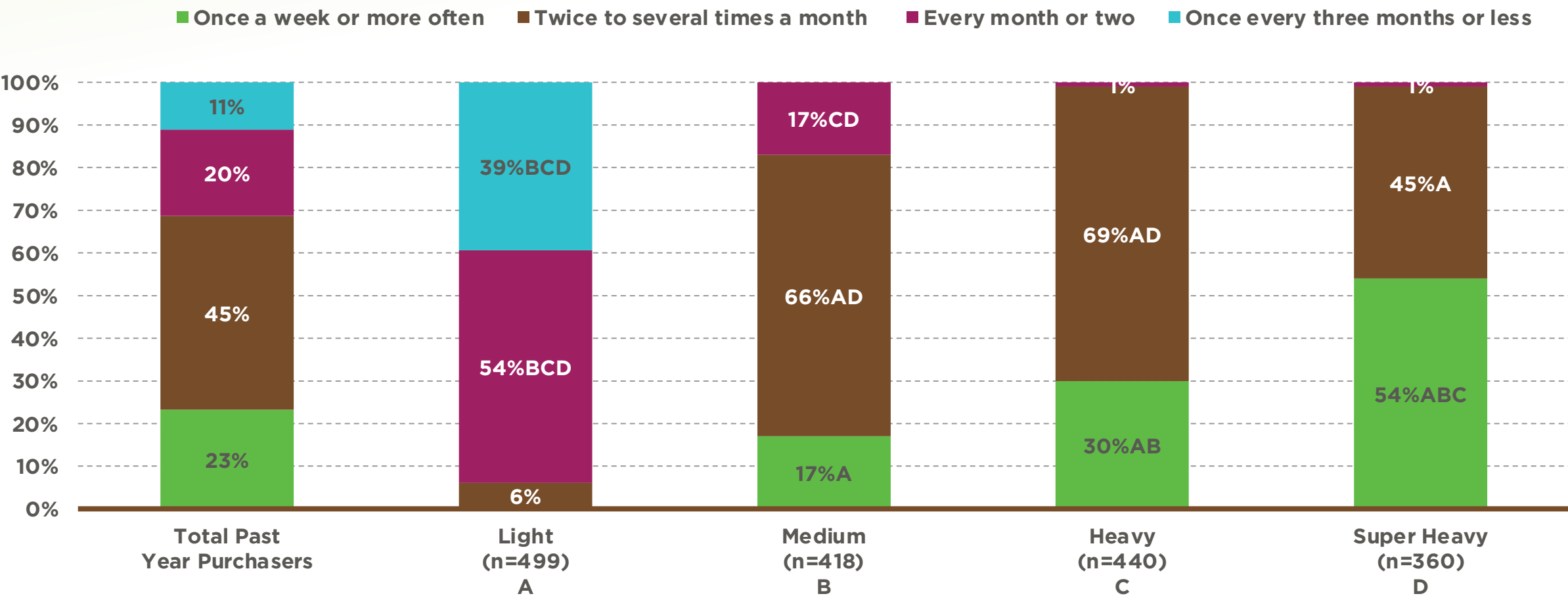
## Share of Past Year Avocado Purchasers:



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, OVER ONE-HALF OF SUPER HEAVY PURCHASERS BUY AVOCADOS EVERY WEEK OR MORE OFTEN.

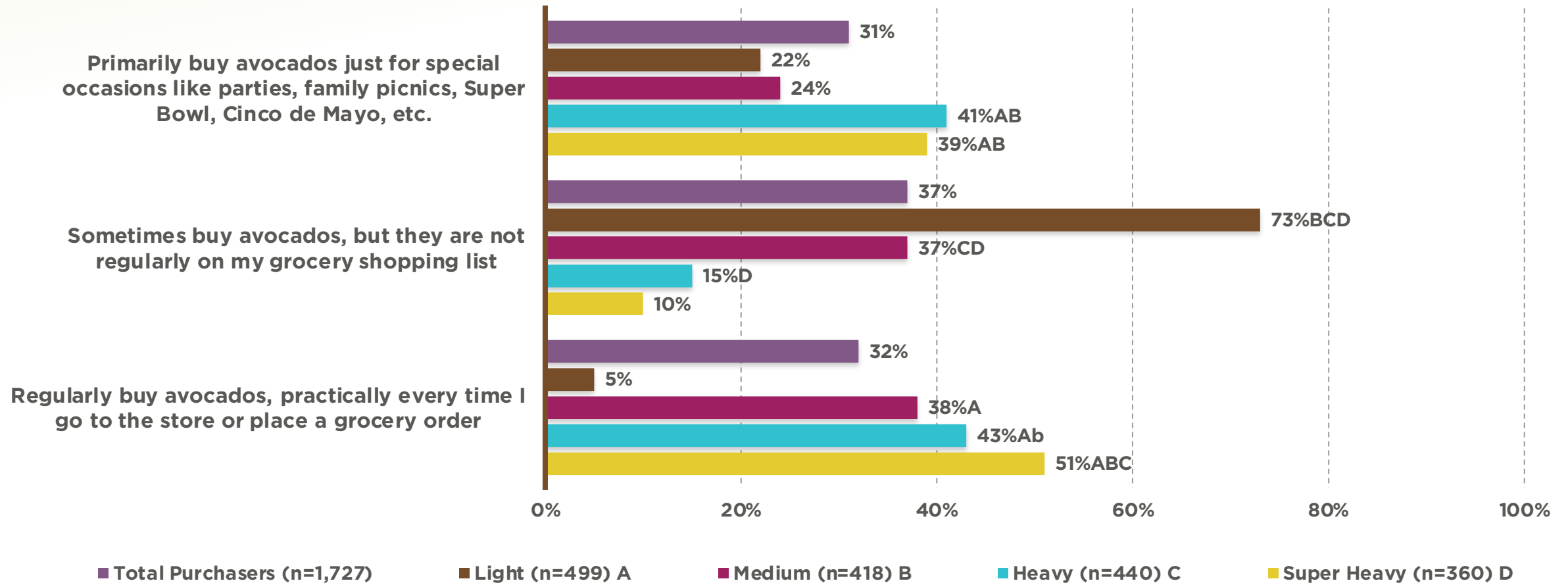


Q120 - Over the course of a year, how often do you buy avocados to eat or serve at home?



# AVOCADO PURCHASE PATTERN

A LARGE PORTION OF AVOCADO PURCHASERS, INCLUDING HEAVY AND SUPER PURCHASERS, ARE PRIMARILY SPECIAL OCCASION PURCHASERS. LIGHT PURCHASERS ARE PREDOMINATELY OCCASIONAL (NOT SPECIAL OCCASION) PURCHASERS

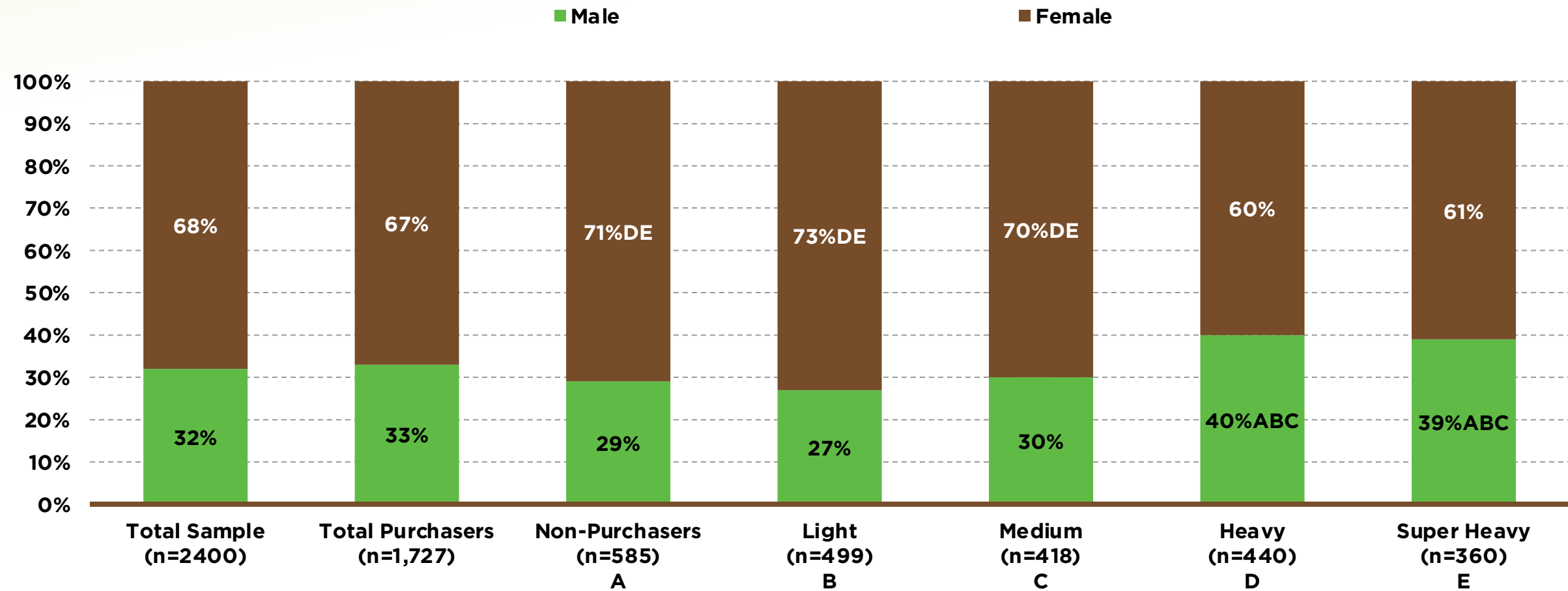


Q133 – Which of the following statements best describes your purchasing of avocados for your household?

# PROFILE OF PURCHASER SEGMENTS

# GENDER

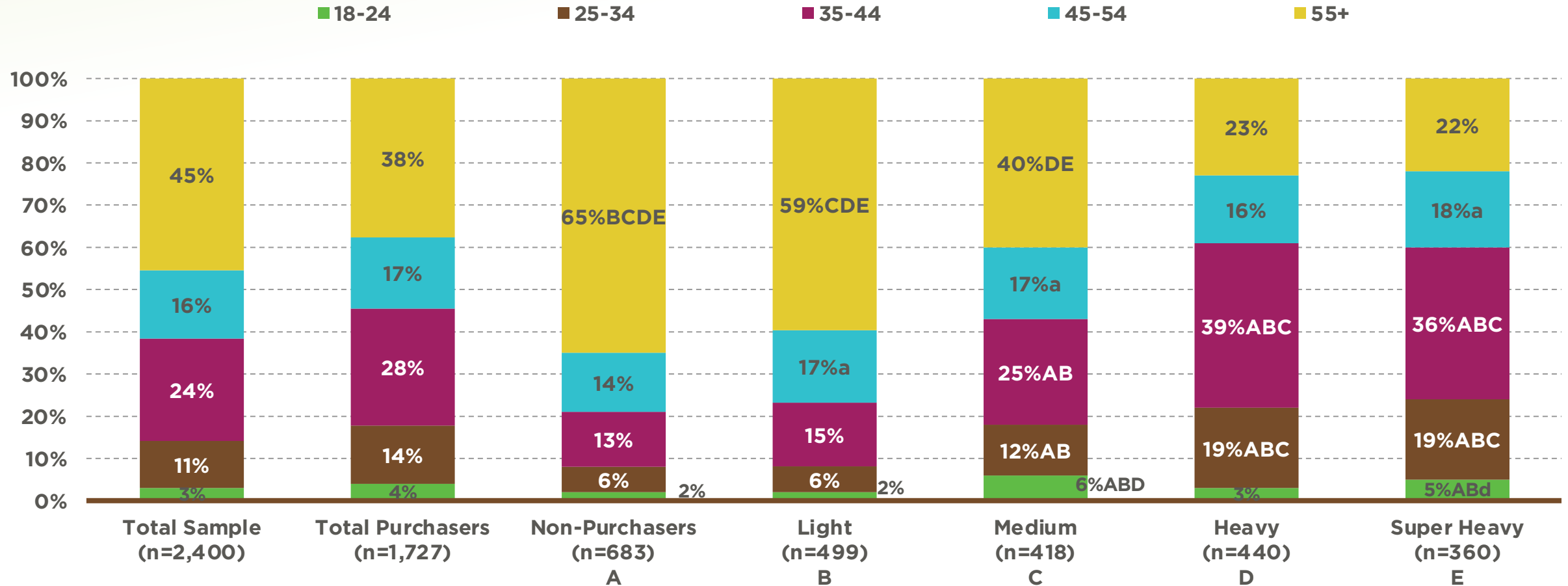
AS SEEN BEFORE, SUPER HEAVY PURCHASERS SKEW MORE MALE THAN SEEN ACROSS MOST OTHER SEGMENTS. HEAVY PURCHASERS ARE TYPICAL SIMILAR TO THE TOTAL SAMPLE ON GENDER, BUT THIS YEAR WE ALSO SEE A MALE SKEW AMONG HEAVY PURCHASERS.



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.

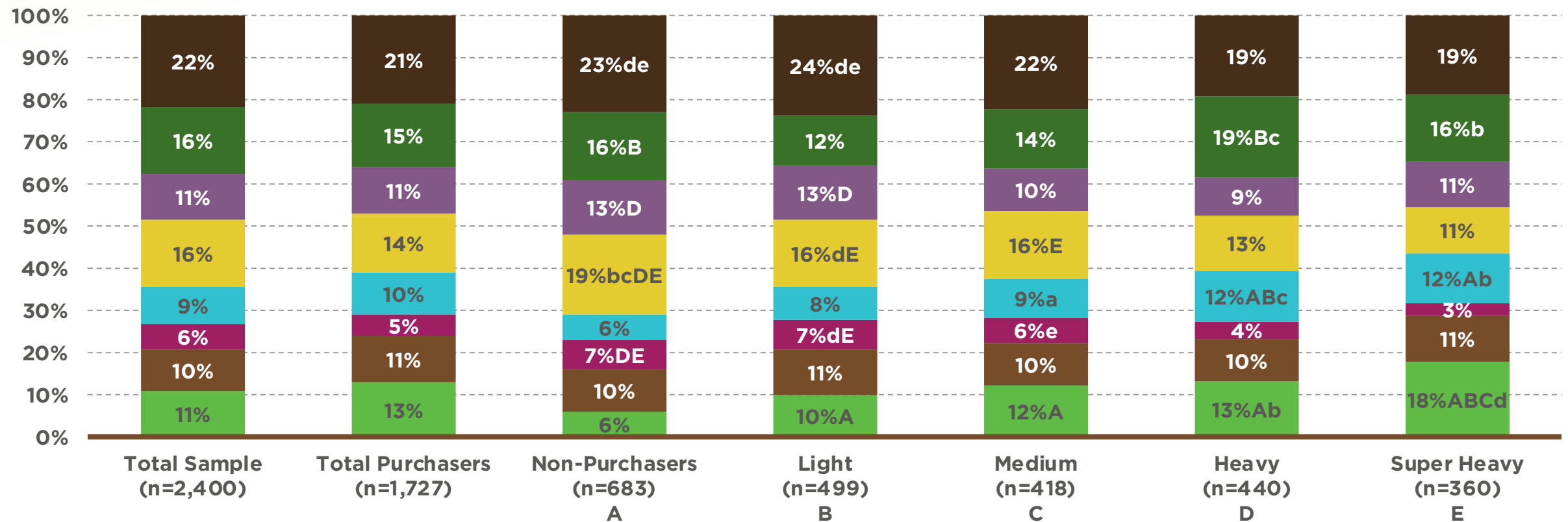


S2 - Please indicate into which of the following age ranges you fall?

# 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

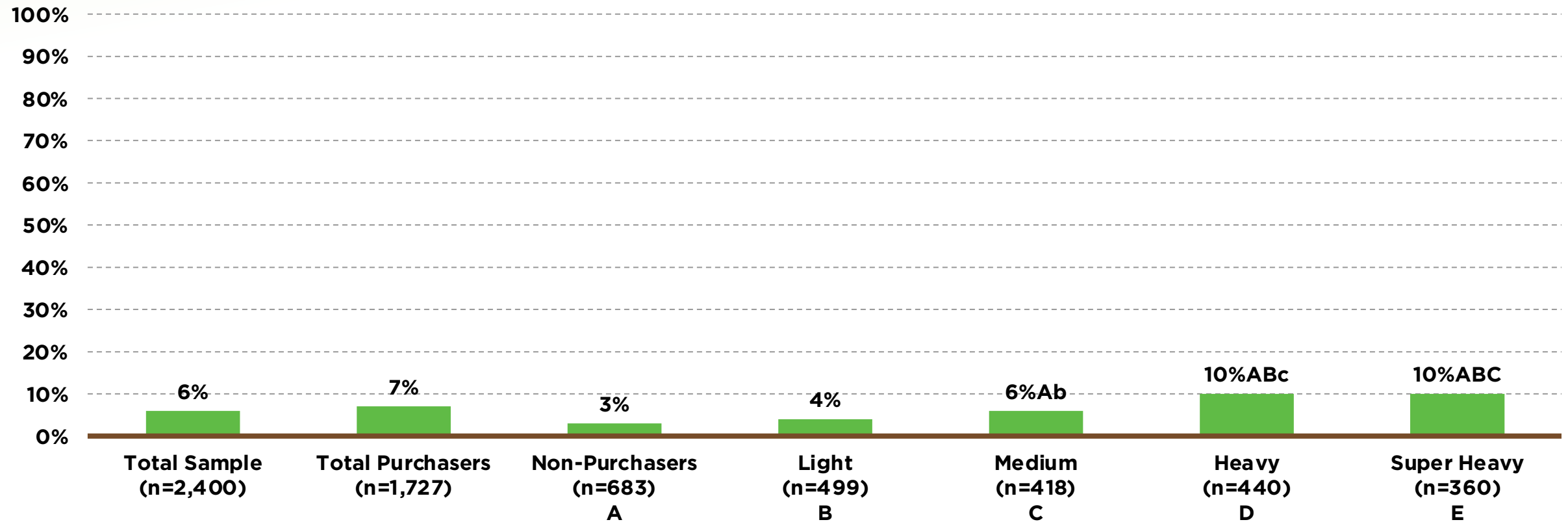


S3 - In what state do you currently reside?



# OF HISPANIC ORIGIN (GENERAL SURVEY IN ENGLISH ONLY)

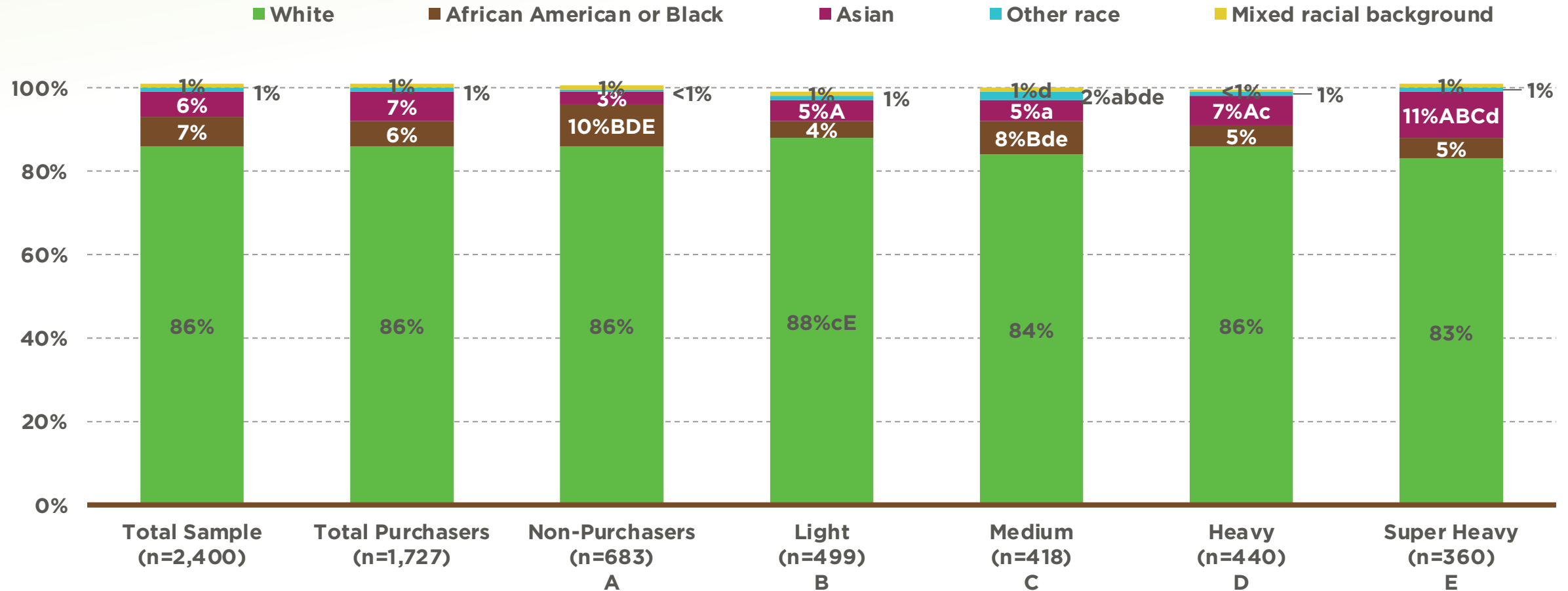
AS SEEN BEFORE, HEAVY AND SUPER HEAVY PURCHASERS SKEW MORE HISPANIC.



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

# RACE

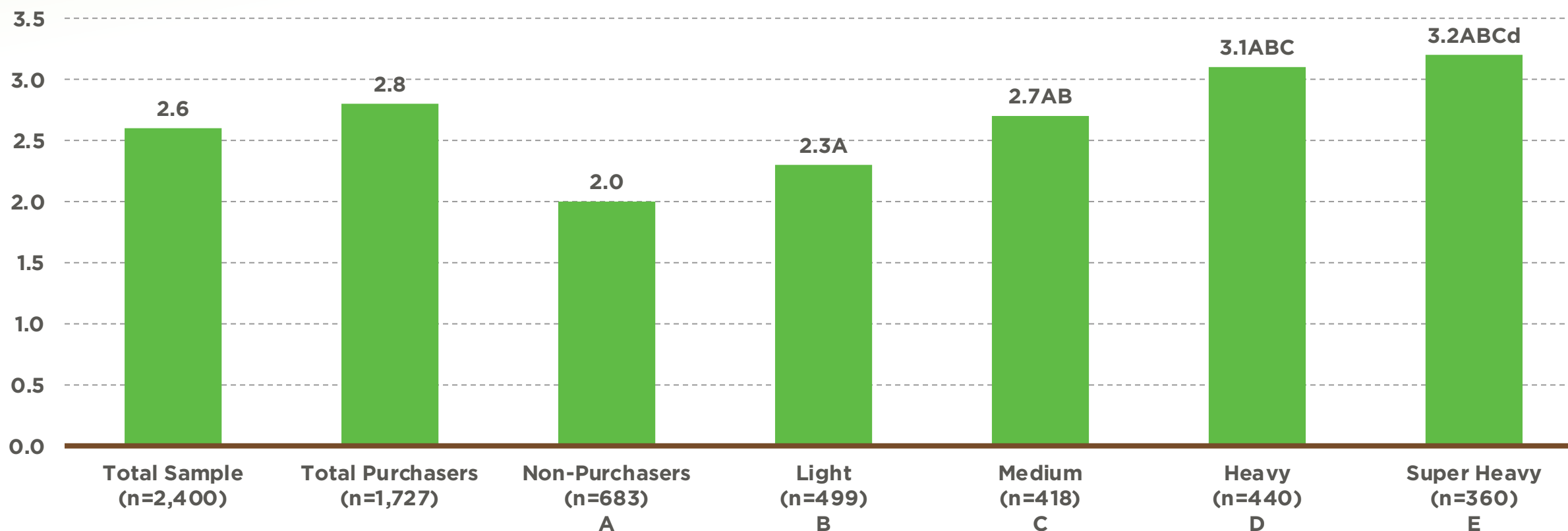
AS AVOCADO USAGE INCREASES TO HEAVY OR SUPER HEAVY, THE RACIAL DIVERSITY OF THE SEGMENTS ALSO INCREASES. NON-USERS HAVE SOMEWHAT OF AN AFRICAN-AMERICAN SKEW.



S7 – Do you consider yourself...?

# AVERAGE NUMBER OF PEOPLE IN HOUSEHOLD

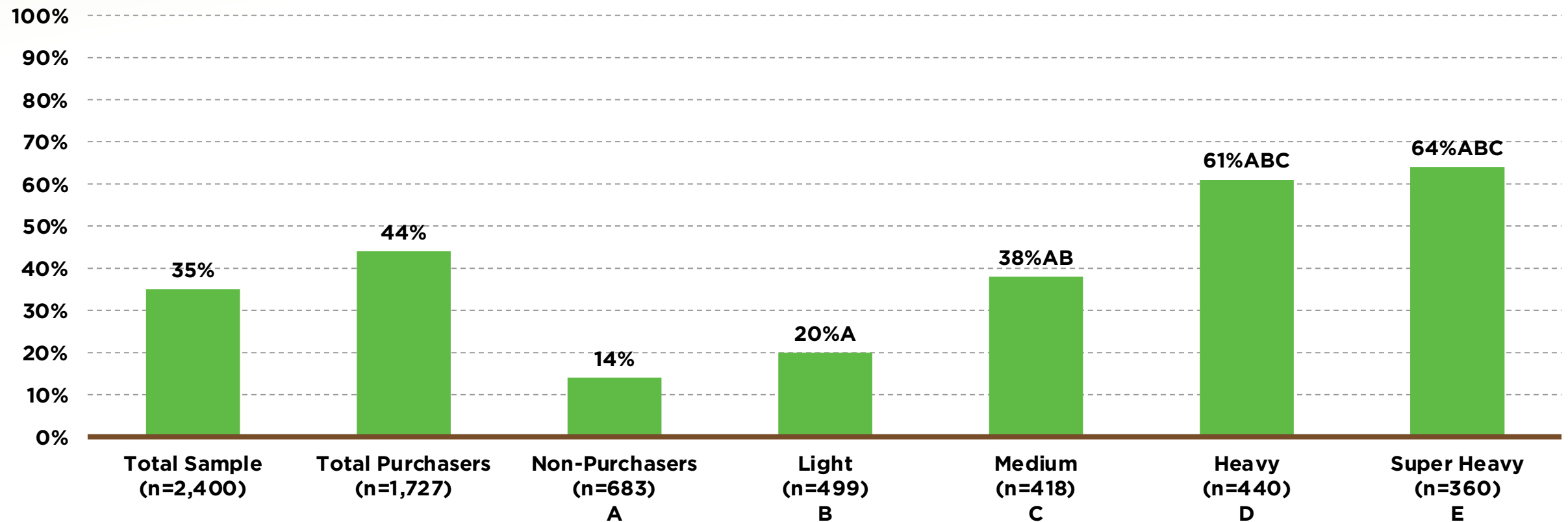
AS SEEN BEFORE, HOUSEHOLD SIZE INCREASES AS AVOCADO CONSUMPTION INCREASES



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

# CHILDREN UNDER 18 LIVING IN HOUSEHOLD

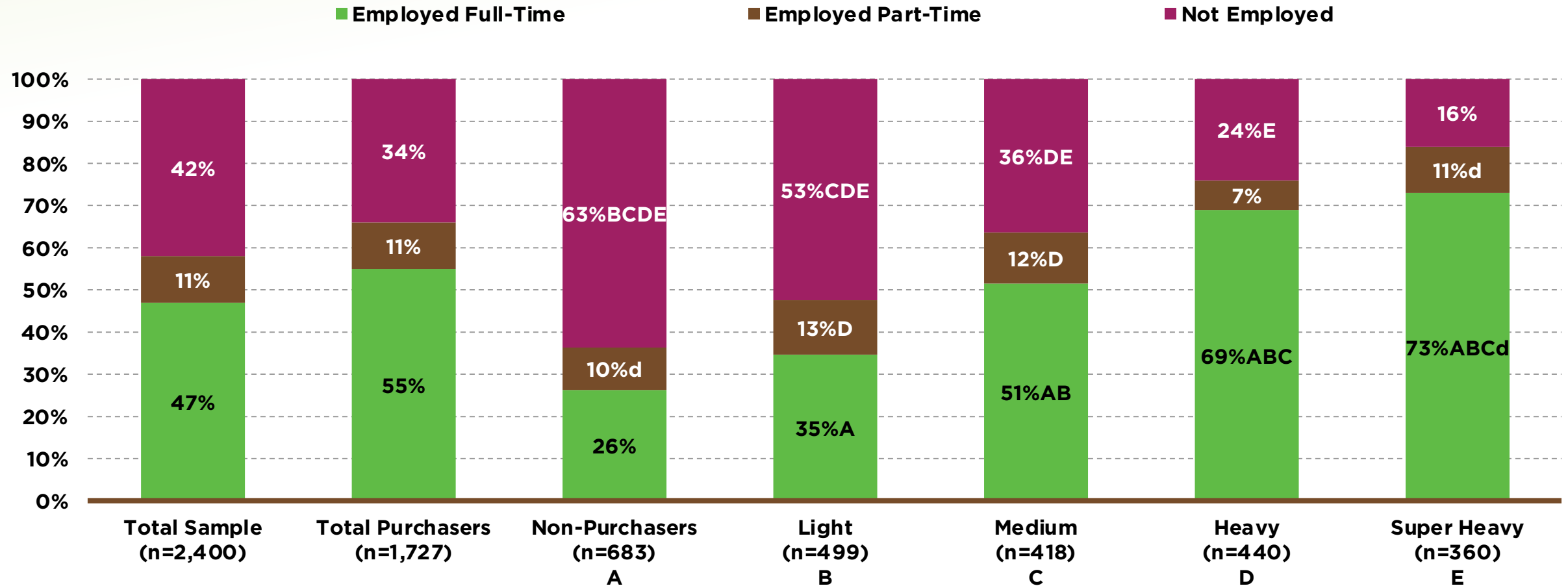
AS SEEN BEFORE, THE PRESENCE OF CHILDREN IN THE HOUSEHOLD INCREASES AS AVOCADO USAGE INCREASES.



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

# EMPLOYMENT STATUS

AS SEEN BEFORE, THE LIKELIHOOD OF BEING EMPLOYED INCREASES AS AVOCADO USAGE INCREASES.

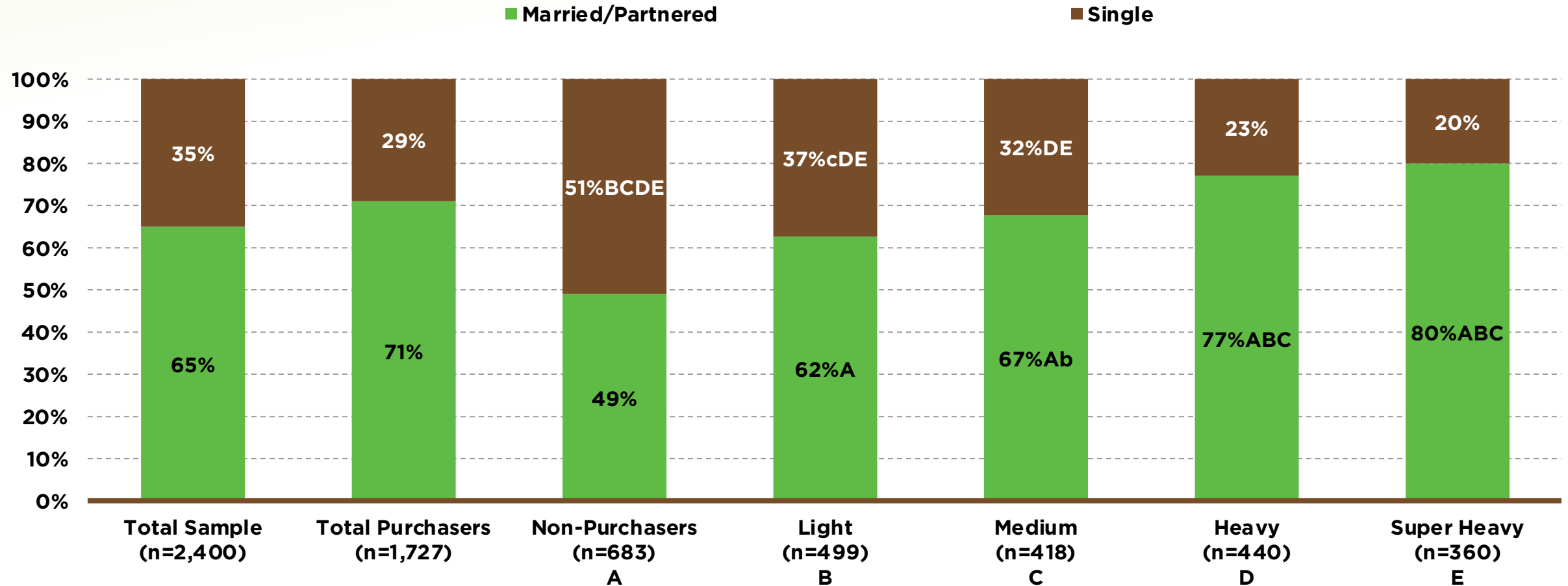


D4 - Please indicate your employment status?



# MARITAL STATUS

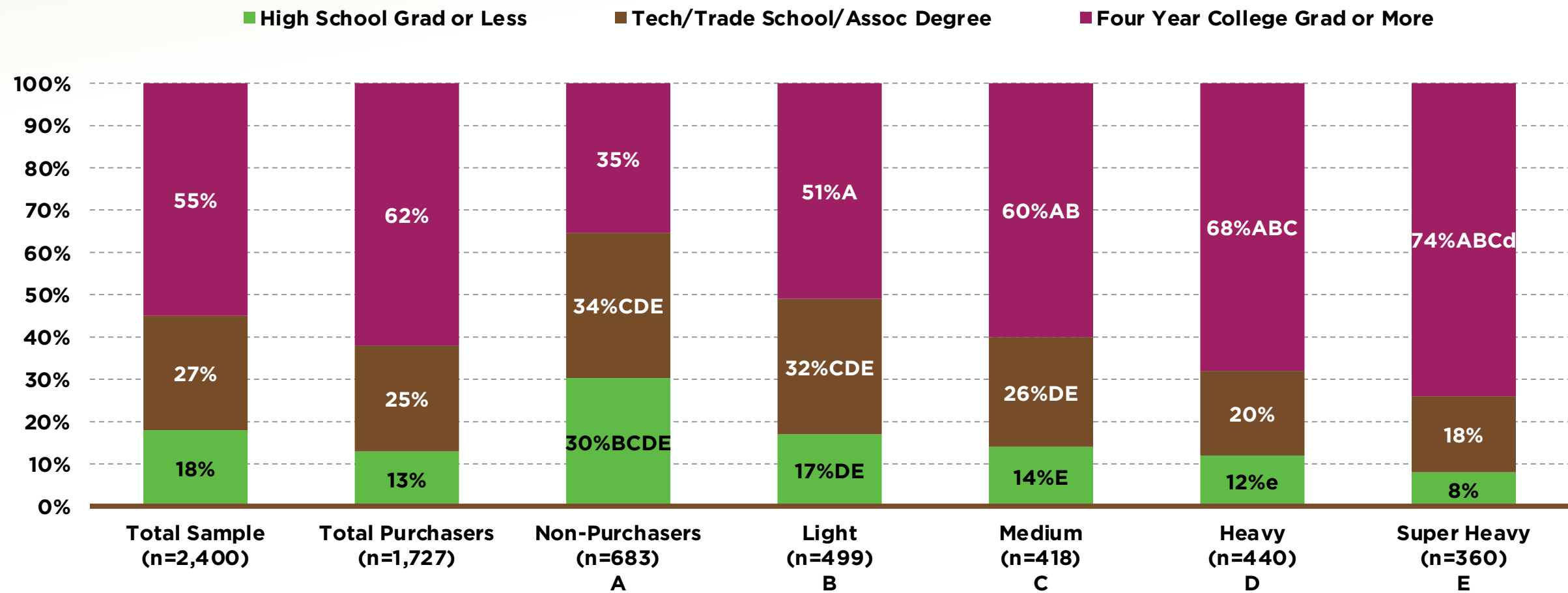
AS SEEN BEFORE, THE LIKELIHOOD OF BEING MARRIED/PARTNERED INCREASES AS AVOCADO USAGE INCREASES.



D5 - What is your marital status?

# EDUCATION LEVEL

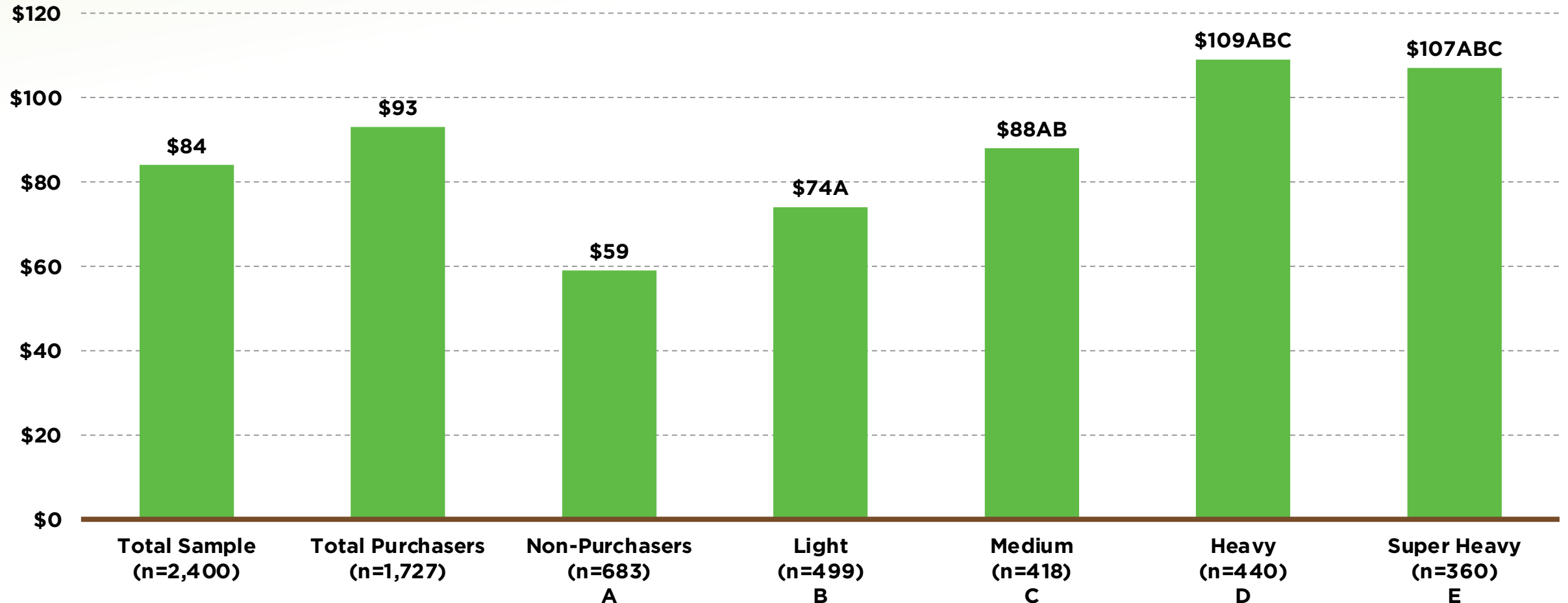
AS SEEN BEFORE, EDUCATIONAL LEVEL INCREASES AS AVOCADO USAGE INCREASES.



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)

AS SEEN BEFORE, HOUSEHOLD INCOME INCREASES AS AVOCADO USAGE INCREASES.

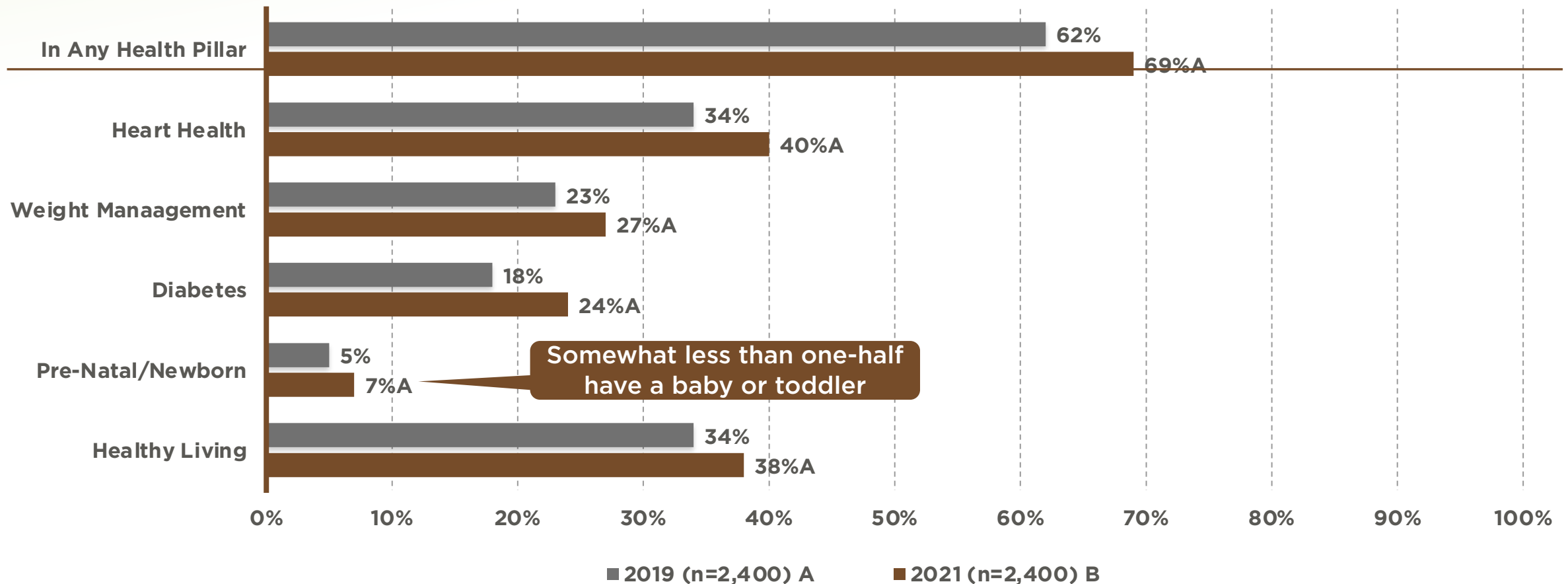


D7 - Which of the following income categories best describes your total [INSERT LAST YEAR] household income before taxes?

# 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. WE SAW INCREASES IN THE PROPORTION OF RESPONDENTS IN EACH HEALTH PILLAR.



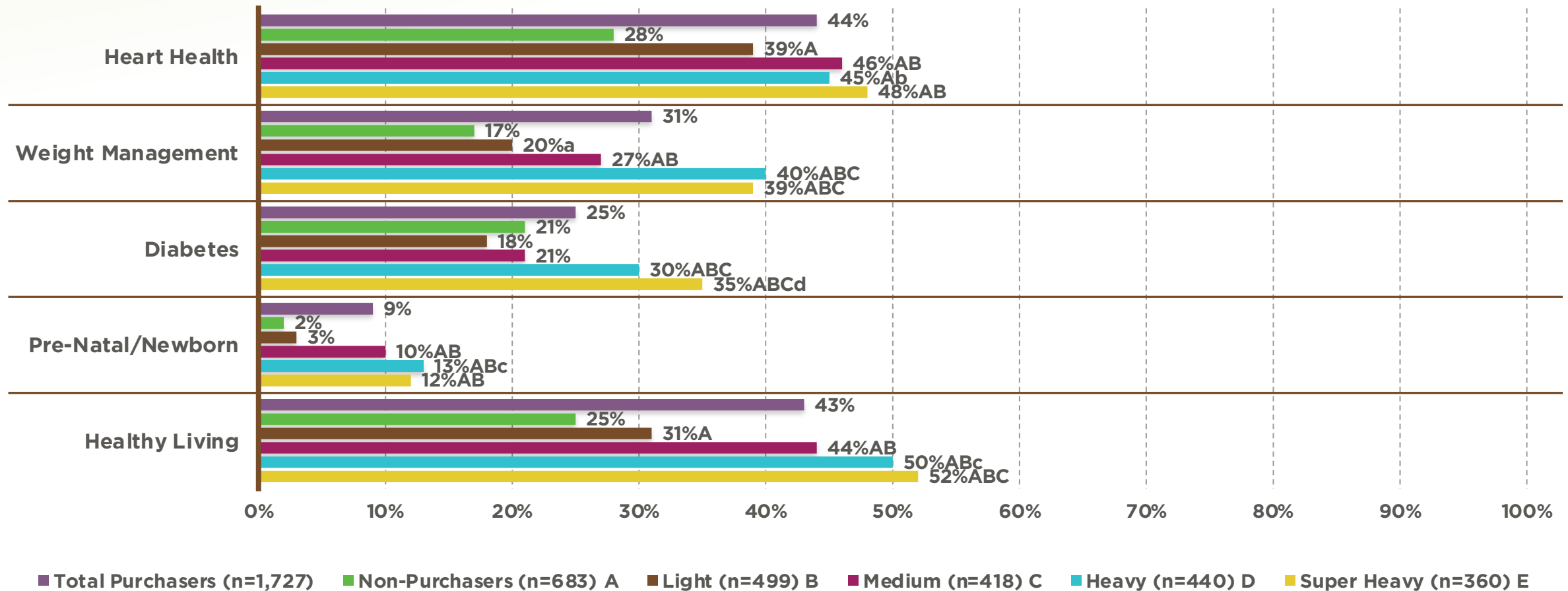
Somewhat less than one-half have a baby or toddler

■ 2019 (n=2,400) A

■ 2021 (n=2,400) B

# HEALTH AND WELLNESS PILLARS

AS SEEN BEFORE, THERE IS STRONG CORRELATION BETWEEN THE AVOCADO USER SEGMENTS AND EACH OF THE HEALTH PILLARS.

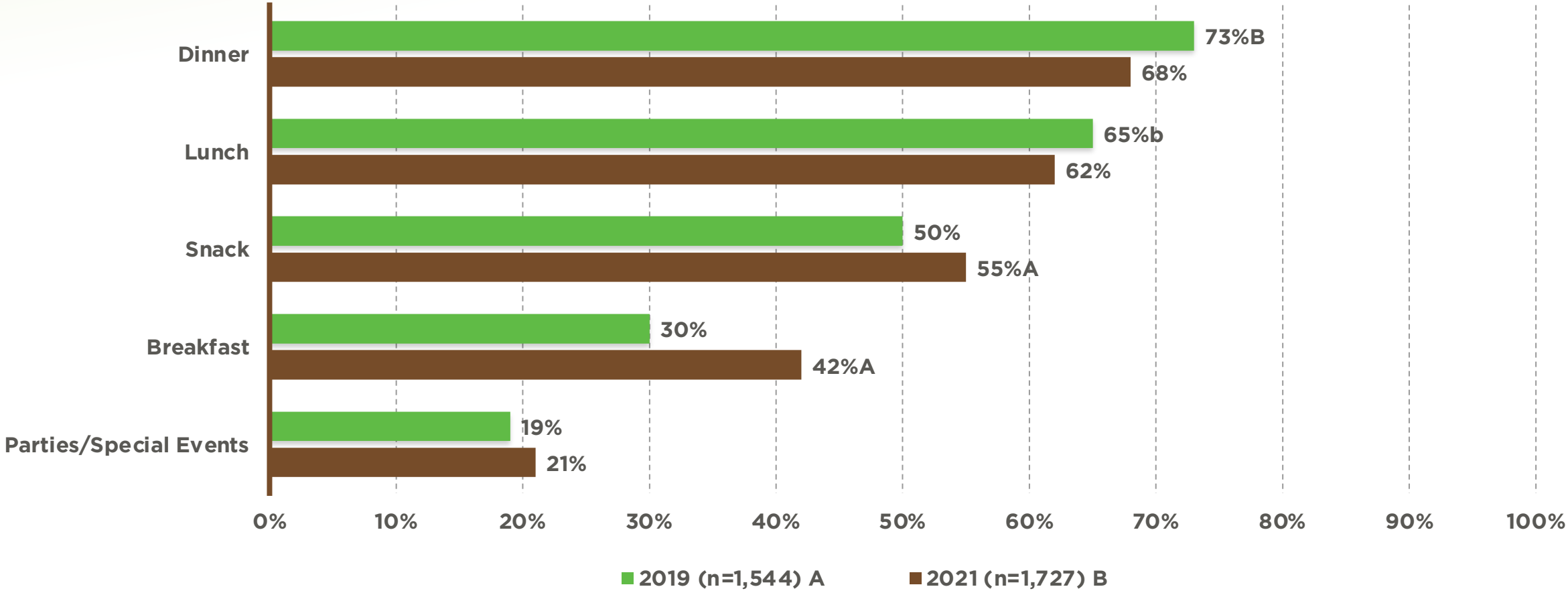




# AVOCADO USAGE

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

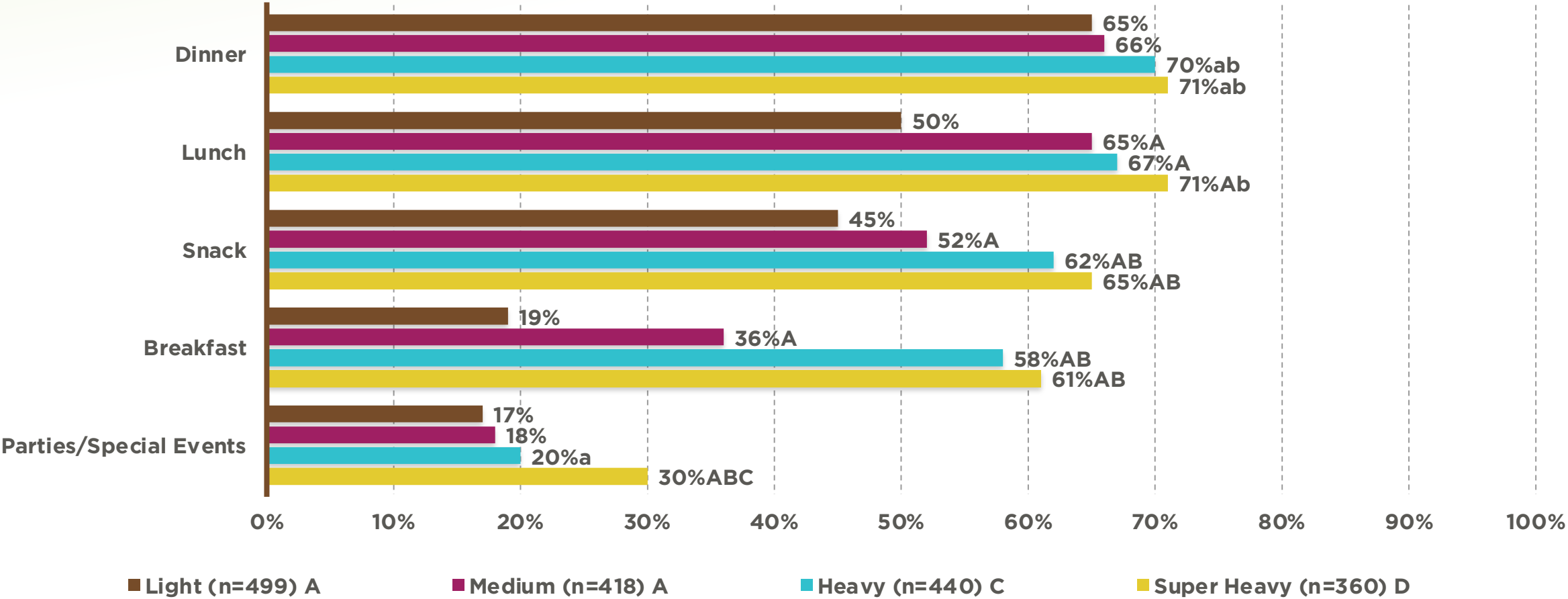
WHILE AVOCADOS ARE USED ACROSS A VARIETY OF MEAL OCCASIONS, DINNER AND LUNCH ARE MOST COMMON. THERE HAS BEEN AN INCREASE IN USING AVOCADOS FOR A SNACK AND FOR BREAKFAST, WHILE USAGE FOR DINNER IS DOWN SOMEWHAT.



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

# MEAL OCCASIONS HOUSEHOLD TYPICALLY USE AVOCADOS

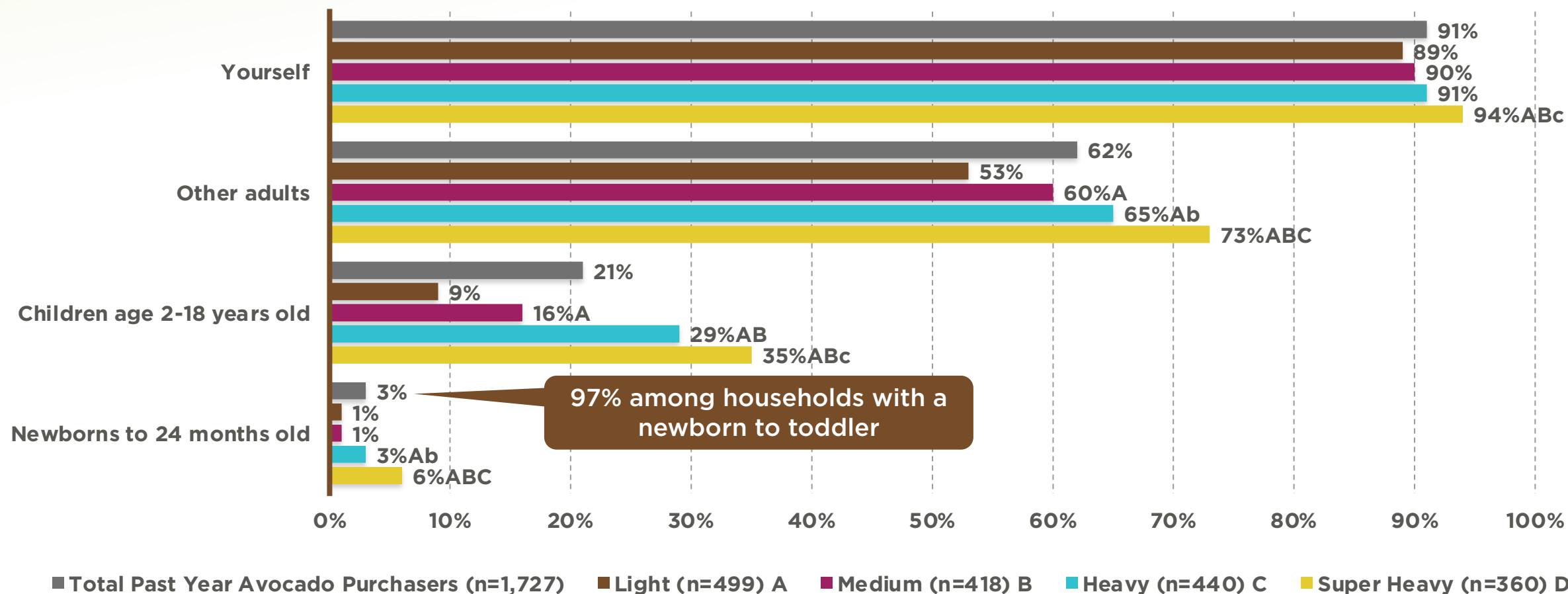
SUPER HEAVY PURCHASERS EXCEED ALL OTHER SEGMENTS IN TERMS OF USING AVOCADOS ACROSS THE VARIOUS MEAL OCCASIONS (EXCEPT DINNER WHERE THEY ARE TIED WITH HEAVY PURCHASERS).



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

# HOUSEHOLD MEMBERS CONSUMING AVOCADOS

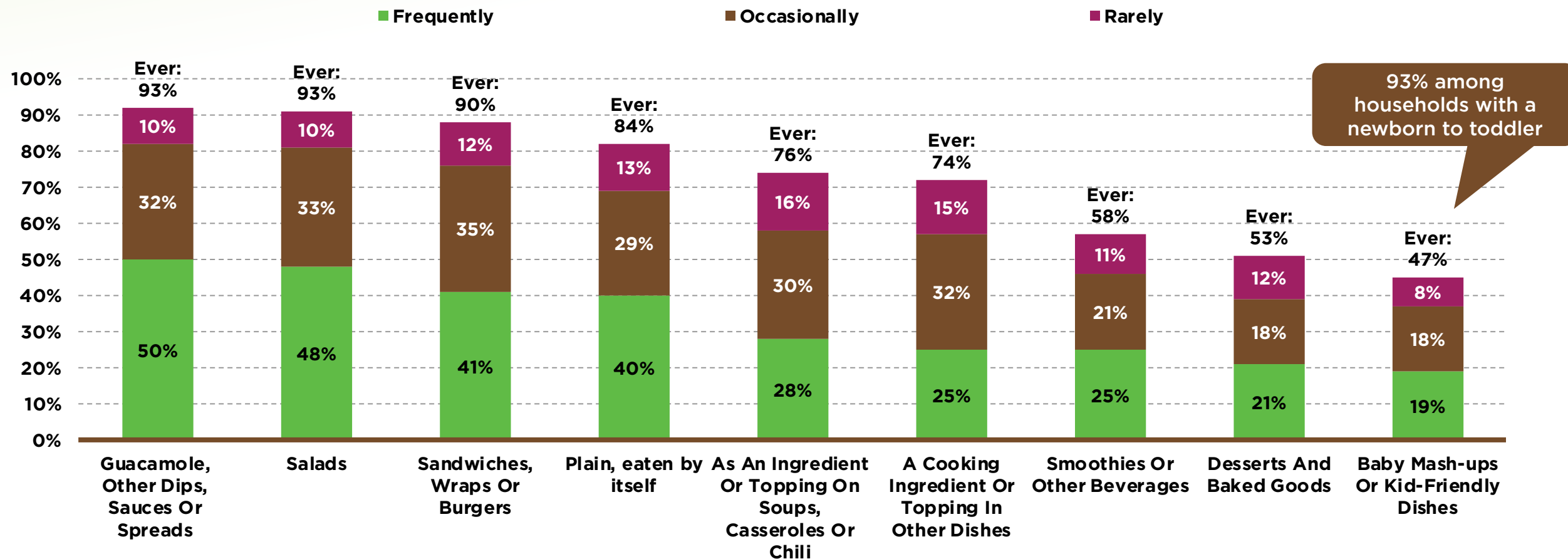
AVOCADO CONSUMPTION IS HIGHER AMONG OTHER HOUSEHOLD MEMBERS FOR SUPER HEAVY PURCHASERS.



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.

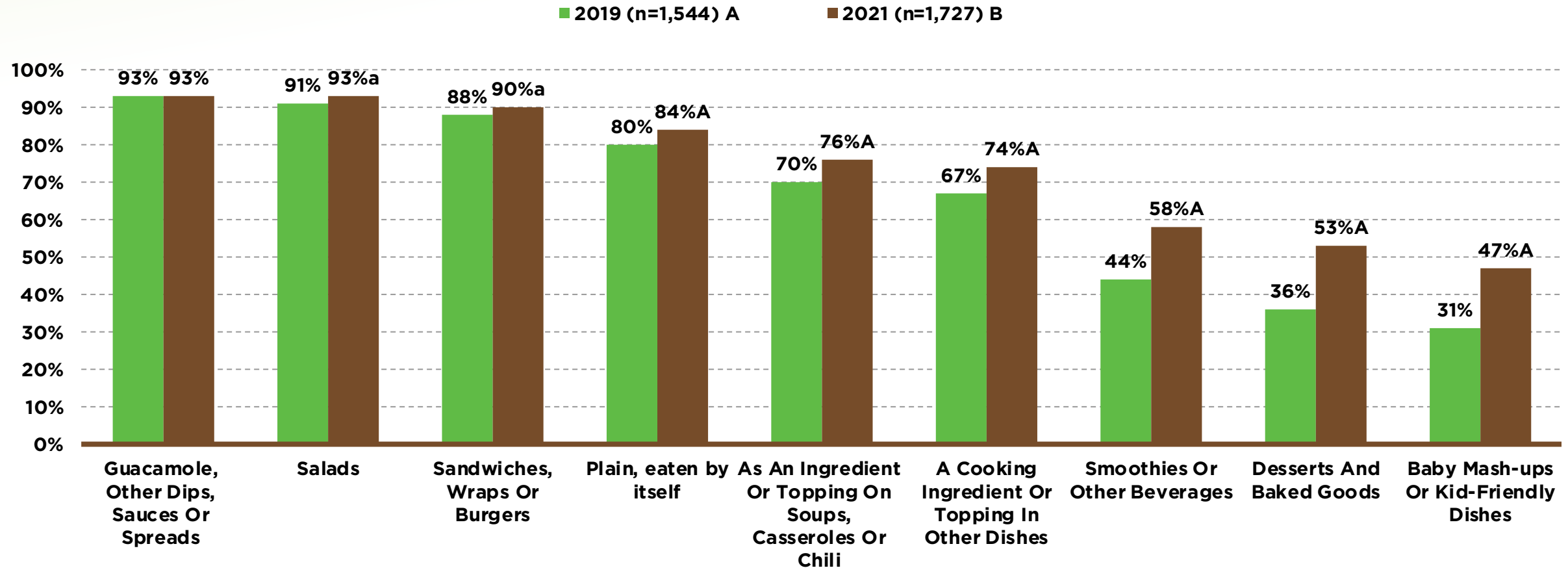


Q170 - How are avocados consumed in your household and how often?



# HOW AVOCADOS ARE EVER CONSUMED (TOTAL PAST YEAR AVOCADO PURCHASERS)

GUACAMOLE/DIPS, SALADS AND SANDWICHES/WRAPS/BURGERS REMAIN THE MOST COMMON WAYS OF USING AVOCADOS. HOWEVER, THERE HAVE BEEN INCREASES IN USING AVOCADOS ACROSS ALL OTHER WAYS.



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/WRAPS/BURGERS. AS SEEN LAST YEAR, THOSE WHO HAVE EMBRACED AVOCADOS IN SANDWICHES/WRAPS/BURGERS TEND TO USE THEM IN MORE WAYS OVERALL.

Consume avocados frequently/occasionally:	In Guacamole (n=1,408) % A	In Salads (n=1,394) % B	On Sandwiches, Wraps or Burgers (n=1,313) % C
In guacamole, other dips, sauces or spreads	100	86	88B
In salads	85	100	88A
On sandwiches, wraps or burgers	82	83a	100
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	73	76A	76A
As an ingredient or topping on soups, casseroles or chili	63	64a	67AB
As a cooking ingredient or topping in dishes other than those listed above	62	63	65AB
In smoothies or other beverages	49	51A	52A
In desserts and baked goods, such as puddings and cakes	43	45A	45Ab
In baby mash-ups or kid- friendly dishes	40	42A	43Ab

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

# 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=374) % A	Medium (n=337) % B	Heavy (n=376) % C	Super (n=315) % D
In salads	71	87A	93AB	91Ab
On sandwiches, wraps or burgers	65	83A	88AB	92ABc
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	48	73A	84AB	88ABc
As an ingredient or topping on soups, casseroles or chili	40	63A	72AB	81ABC
As a cooking ingredient or topping in dishes other than those listed above	39	57A	76AB	79AB
In smoothies or other beverages	20	45A	64AB	71ABC
In desserts and baked goods, such as puddings and cakes	18	36A	56AB	64ABC
In baby mash-ups or kid- friendly dishes	15	33A	53AB	60ABc

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

# 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=334) % A	Medium (n=343) % B	Heavy (n=389) % C	Super (n=319) % D
In guacamole, other dips, sauces or spreads	80	85A	89Ab	90Ab
On sandwiches, wraps or burgers	70	83A	86Ab	92ABC
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	56	75A	84AB	88ABc
As an ingredient or topping on soups, casseroles or chili	43	62A	71AB	82ABC
As a cooking ingredient or topping in dishes other than those listed above	43	57A	74AB	79ABc
In smoothies or other beverages	26	45A	61AB	72ABC
In desserts and baked goods, such as puddings and cakes	22	37A	54AB	65ABC
In baby mash-ups or kid- friendly dishes	19	33A	54AB	61ABc

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

# 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=234) % A	Medium (n=320) % B	Heavy (n=369) % C	Super (n=321) % D
In guacamole, other dips, sauces or spreads	84	87	90a	91Ab
In salads	100BCD	88	91	91
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	64	72a	84AB	87AB
As an ingredient or topping on soups, casseroles or chili	53	64A	72AB	81ABC
As a cooking ingredient or topping in dishes other than those listed above	50	58a	75AB	79AB
In smoothies or other beverages	29	45A	63AB	71ABC
In desserts and baked goods, such as puddings and cakes	26	37A	57AB	62ABc
In baby mash-ups or kid- friendly dishes	24	35A	55AB	59AB

# WAYS EVER CONSUMED AVOCADOS

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

	Light (n=499) % A	Medium (n=418) % B	Heavy (n=440) % C	Super Heavy (n=360) % D
In guacamole, other dips, sauces or spreads	90	93a	95Ab	97ABc
In salads	84	94A	97AB	97Ab
On sandwiches, wraps or burgers	80	92A	95Ab	96AB
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	66	86A	94AB	95AB
As an ingredient or topping on soups, casseroles or chili	55	78A	85AB	90ABC
As a cooking ingredient or topping in dishes other than those listed above	52	73A	87AB	91ABC
In smoothies or other beverages	29	58A	74AB	80ABC
In desserts and baked goods, such as puddings and cakes	25	51A	67AB	75ABC
In baby mash-ups or kid- friendly dishes	20	44A	63AB	69ABc

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



# 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=499) % A	Medium (n=418) % B	Heavy (n=440) % C	Super Heavy (n=360) % D
In guacamole, other dips, sauces or spreads	43	48a	54Ab	58AB
In salads	27	51A	57Ab	63ABc
On sandwiches, wraps or burgers	18	41A	53AB	56AB
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	21	38A	48AB	61ABC
As an ingredient or topping on soups, casseroles or chili	11	23A	36AB	48ABC
As a cooking ingredient or topping in dishes other than those listed above	9	21A	34AB	43ABC
In smoothies or other beverages	8	23A	34AB	40ABc
In desserts and baked goods, such as puddings and cakes	7	15A	31AB	36ABc
In baby mash-ups or kid- friendly dishes	6	14A	28AB	35ABC

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

# WAYS FREQUENTLY/OCCASIONALLY CONSUME AVOCADOS

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

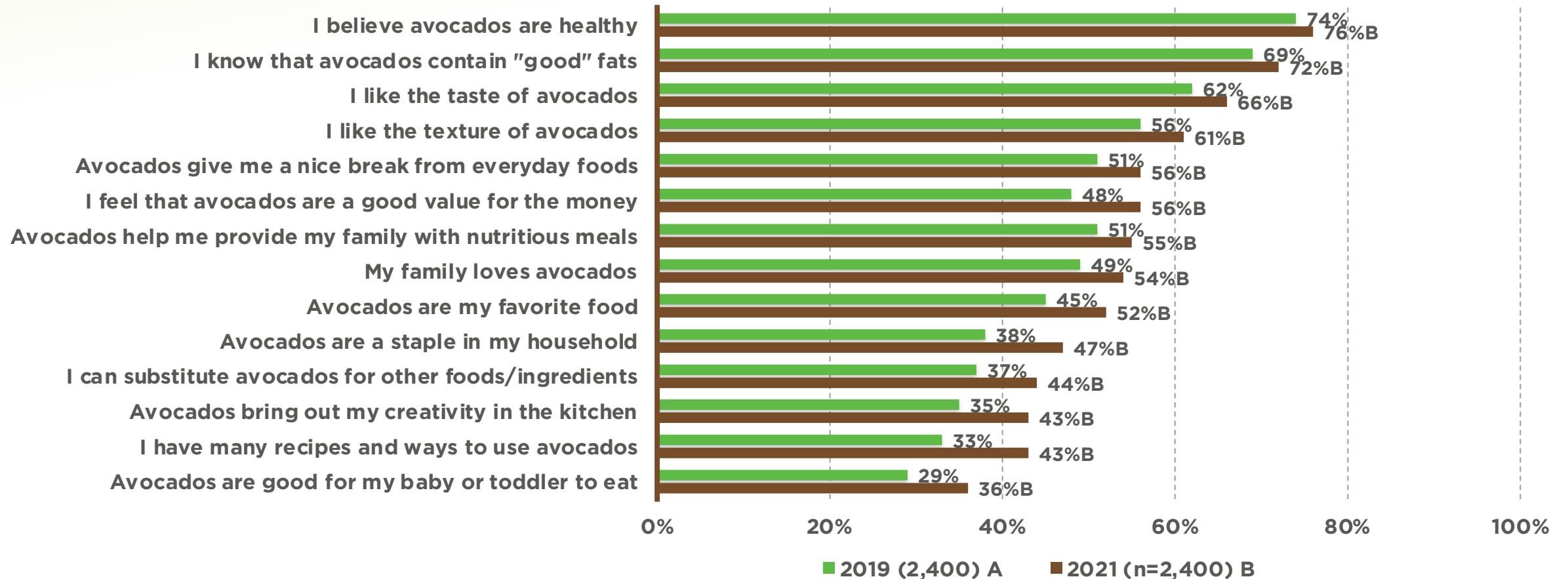
	Light (n=499) % A	Medium (n=418) % B	Heavy (n=440) % C	Super Heavy (n=360) % D
In guacamole, other dips, sauces or spreads	75	81A	85Ab	88AB
In salads	67	82A	88AB	89AB
On sandwiches, wraps or burgers	60	77A	84AB	89ABC
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	48	70A	80AB	85ABc
As an ingredient or topping on soups, casseroles or chili	36	57A	67AB	78ABC
As a cooking ingredient or topping in dishes other than those listed above	35	53A	70AB	76ABc
In smoothies or other beverages	20	43A	60AB	71ABC
In desserts and baked goods, such as puddings and cakes	16	34A	53AB	61ABC
In baby mash-ups or kid- friendly dishes	15	32A	51AB	58ABC

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

# AVOCADO PURCHASE DRIVERS AND BARRIERS

# 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. AGREEMENT WITH ALL OF THESE REASONS FOR PURCHASING AVOCADOS HAS INCREASED SINCE 2019.



Q180 – Below is a list of reasons why you personally [PIPE IF NEVER BOUGHT AVOCADOS (Q100/I=0)] might buy avocados for use in the home [PIPE IF BOUGHT AVOCADOS (Q100/I=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.

	Total Purchasers (n=1,727)	Non-Purchasers (n=683) % A	Light (n=499) % B	Medium (n=418) % C	Heavy (n=440) % D	Super Heavy (n=360) % E
I believe avocados are healthy	87	51	82A	88AB	90AB	88AB
I know that avocados contain “good” fats	83	43	76A	86AB	87AB	86AB
I like the taste of avocados	82	26	71A	84AB	89ABC	89ABC
I like the texture of avocados	77	21	59A	79AB	86ABC	87ABC
Avocados give me a nice break from everyday foods	71	18	58A	69AB	81ABC	82ABC
I feel that avocados are a good value for the money	69	22	49A	70AB	83ABCe	79ABC
Avocados help me provide my family with nutritious meals	69	20	47A	72AB	80ABC	85ABCd
My family loves avocados	69	16	46A	71AB	83ABC	84ABC
Avocados are a staple in my household	61	12	24A	66AB	81ABC	84ABC
Avocados are my favorite fruit	59	34	45A	58AB	69ABC	69ABC
I have many recipes and ways to use avocados	56	12	28A	52AB	74ABC	78ABC
I can substitute avocados for other foods/ingredients	55	18	31A	51AB	71ABC	72ABC
Avocados bring out my creativity in the kitchen	55	12	31A	50AB	73ABC	75ABC
Avocados are good for my baby or toddler to eat	45	14	22A	37AB	60ABC	69ABCD

Q180 – Below is a list of reasons why you personally [PIPE IF NEVER BOUGHT AVOCADOS (Q100/I=0)] might buy avocados for use in the home [PIPE IF BOUGHT AVOCADOS (Q100/I=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 NUTRIENT DENSE AND HAVE A LOT OF VITAMINS AND MINERALS AND BEING A SOURCE OF MANY IMPORTANT NUTRIENTS. ANOTHER 17 ATTRIBUTES ARE ALSO VERY IMPORTANT. MOST OF THE REST ARE MODERATELY IMPORTANT.



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

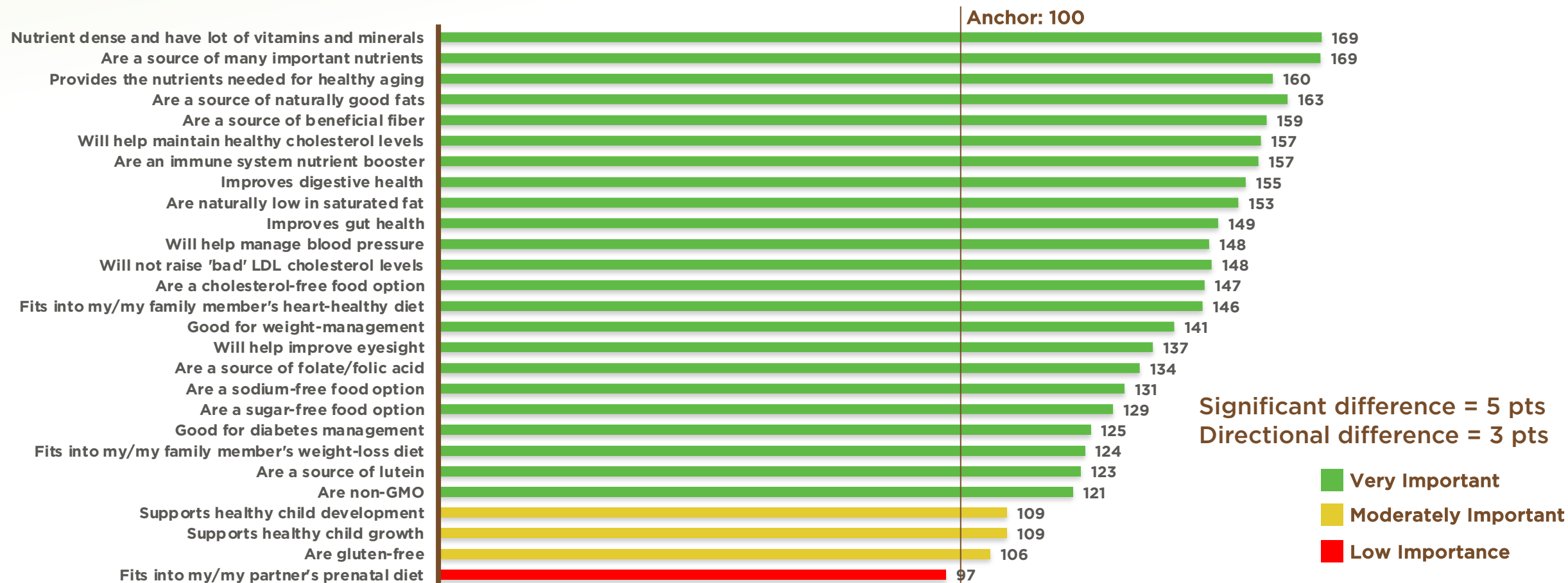
WHILE THE DEGREE OF IMPORTANCE VARIES, THE TOP TWO DECISION DRIVERS ARE THE SAME ACROSS ALL USER SEGMENTS. AS AVOCADO CONSUMPTION INCREASES, THE IMPORTANCE OF THE DIFFERENT ATTRIBUTES ALSO INCREASES.

	Total Sample (n=2,400)	Total Purchasers (n=1,727)	Non-Purchasers (n=683) A	Light (n=499) B	Medium (n=418) C	Heavy (n=440) D	Super Heavy (n=360) E
Nutrient dense and have lot of vitamins and minerals	162	169	145	161A	165A	175ABC	178ABC
Are a source of many important nutrients	162	169	144	160A	166Ab	176ABC	177ABC
Provides the nutrients needed for healthy aging	153	160	136	148A	157AB	167ABC	171ABC
Are a source of naturally good fats	153	163	128	149A	161AB	171ABC	174ABC
Are a source of beneficial fiber	151	159	131	145A	155AB	167ABC	172ABCd
Will help maintain healthy cholesterol levels	150	157	129	142A	155AB	167ABC	171ABCd
Are an immune system nutrient booster	149	157	129	141A	153AB	167ABC	172ABCd
Improves digestive health	147	155	127	137A	152AB	165ABC	171ABCd
Are naturally low in saturated fat	143	153	118	134A	151AB	164ABC	169ABCd
Improves gut health	141	149	118	128A	146AB	162ABC	168ABCd
Will help manage blood pressure	140	148	120	128A	143AB	159ABC	166ABCd
Will not raise 'bad' LDL cholesterol levels	139	148	117	128A	147AB	160ABC	164ABC
Are a cholesterol-free food option	137	147	114	125A	143AB	160ABC	165ABCd
Fits into my/my family member's heart-healthy diet	136	146	111	125A	142AB	159ABC	166ABCd
Good for weight-management	132	141	111	119A	136AB	155ABC	161ABCd
Will help improve eyesight	129	137	107	113a	132AB	152ABC	159ABCd
Are a source of folate/folic acid	124	134	98	107A	129AB	151ABC	159ABCD
Are a sodium-free food option	122	131	99	105a	124AB	148ABC	157ABCD
Are a sugar-free food option	120	129	97	102	120AB	147ABC	155ABCD
Good for diabetes management	116	125	94	93	117AB	144ABC	156ABCD
Fits into my/my family member's weight-loss diet	113	124	85	94a	116AB	143ABC	152ABCD
Are a source of lutein	112	123	83	91a	117AB	143ABC	151ABCd
Are non-GMO	110	121	82	89a	115AB	141ABC	150ABCD
Supports healthy child development	97	109	67	69	97AB	134ABC	147ABCD
Supports healthy child growth	97	109	66	69	96AB	135ABC	148ABCD
Are gluten-free	94	106	65	68	97AB	129ABC	141ABCD
Fits into my/my partner's prenatal diet	85	97	55	58	85AB	123ABC	135ABCD

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

TOTAL PURCHASERS

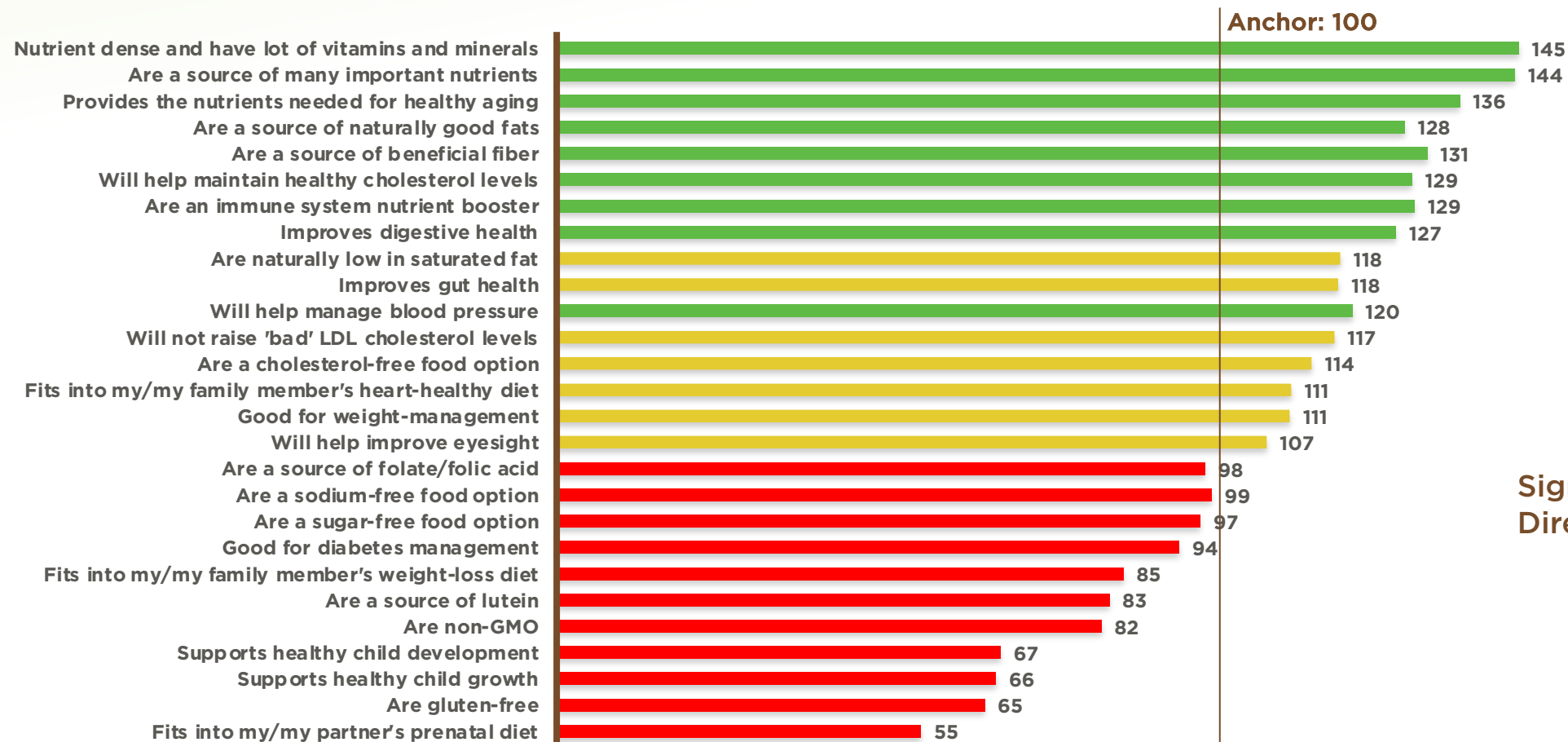
AMONG TOTAL AVOCADO PURCHASERS, THE TOP TWO DECISION DRIVERS WHEN PURCHASING FRESH PRODUCT ARE NUTRIENT DENSE AND HAVE A LOT OF VITAMINS AND MINERALS AND BEING A SOURCE OF MANY IMPORTANT NUTRIENTS. ANOTHER 21 ATTRIBUTES ARE ALSO VERY IMPORTANT. MOST OF THE REST ARE MODERATELY IMPORTANT.



# 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 (9 VS. 19) AND MANY MORE NON-IMPORTANT ATTRIBUTES THAN SEE IN TOTAL (11 VS. 4).



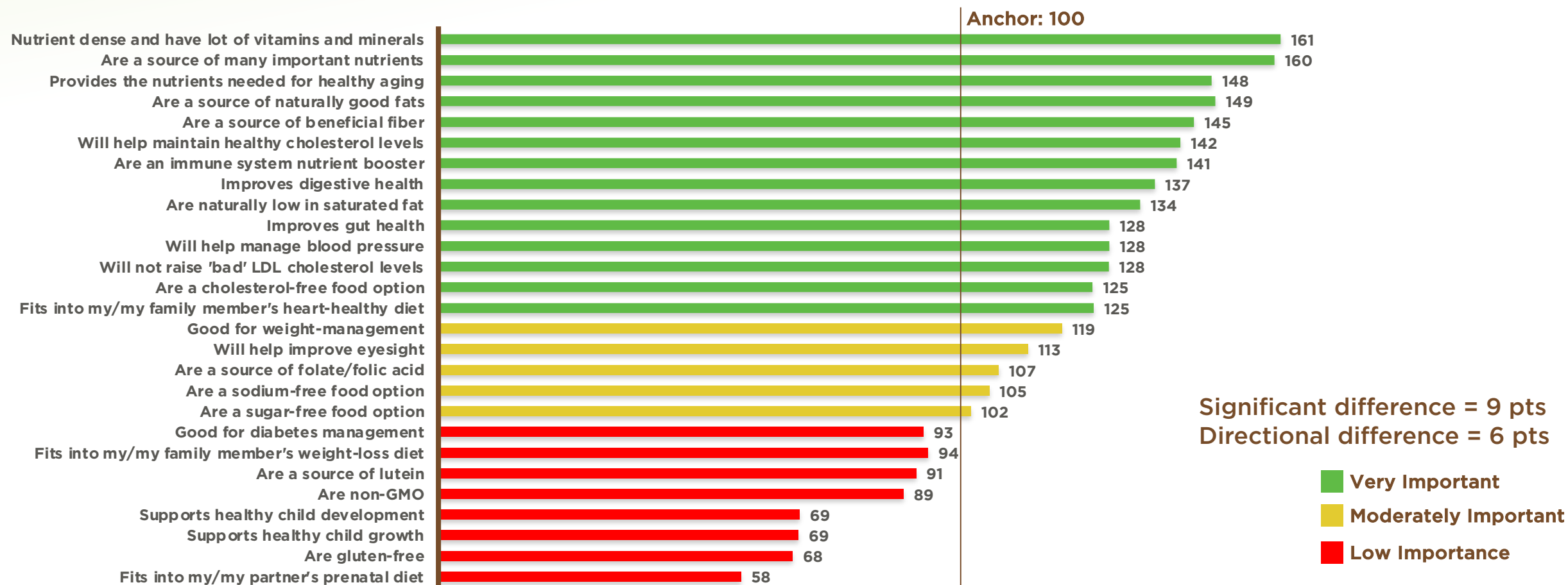
Significant difference = 7 pts  
Directional difference = 5 pts

Very Important  
Moderately Important  
Low Importance

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

LIGHT AVOCADO PURCHASERS

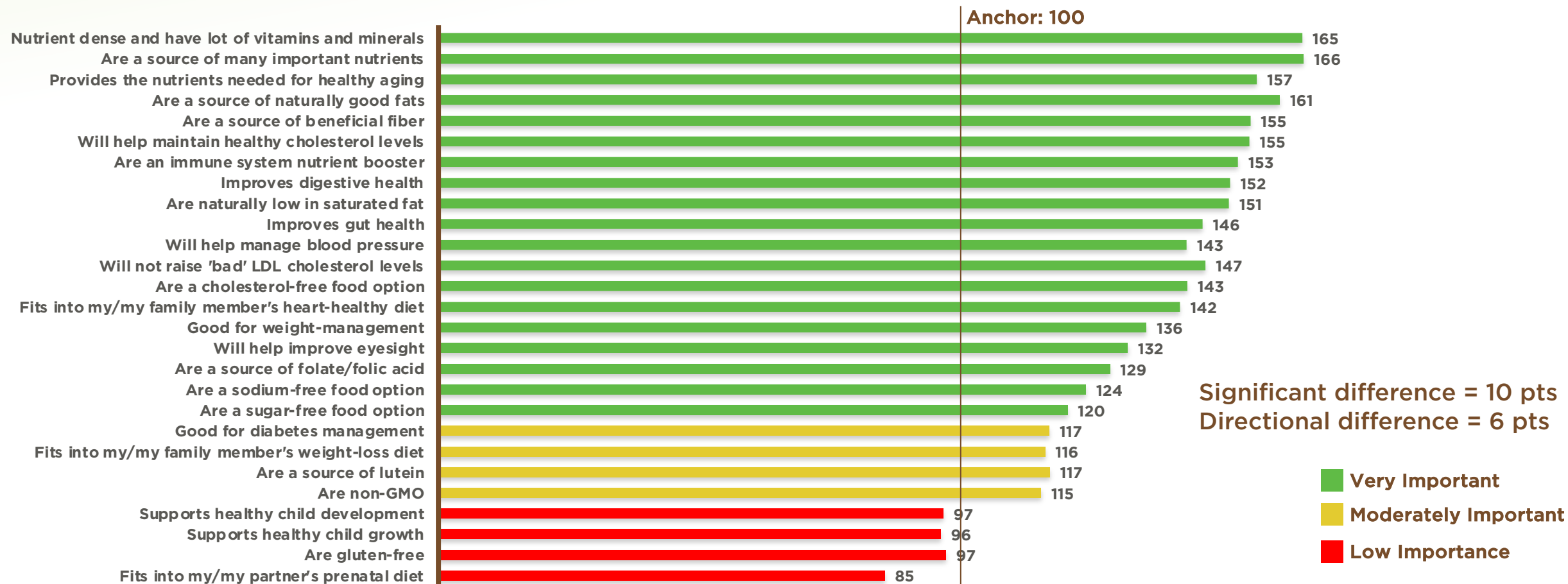
THE MOST IMPORTANT ATTRIBUTES OVERALL REMAIN AT THE TOP AMONG LIGHT AVOCADO PURCHASERS, BUT A NUMBER OF THEM DROP INTO MODERATE TO LOW IMPORTANCE



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

## MEDIUM AVOCADO PURCHASERS

MEDIUM AVOCADO PURCHASERS ARE MORE INLINE WITH THE OVERALL SAMPLE.

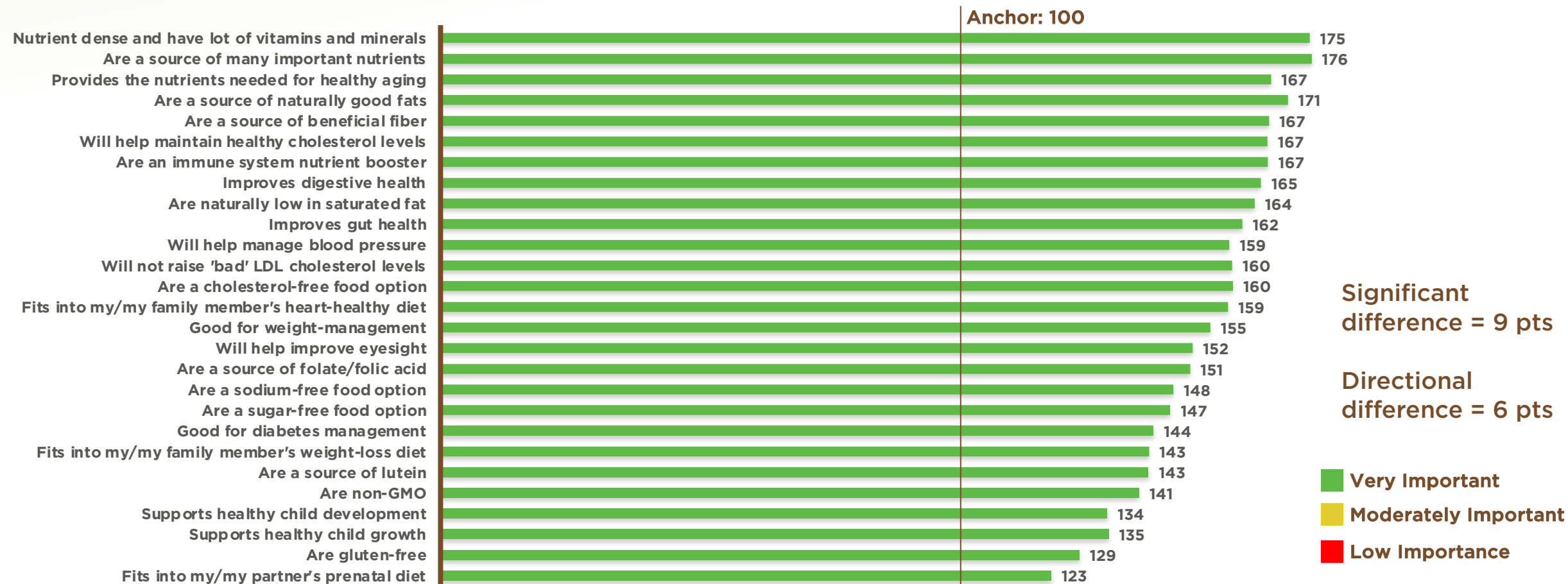




# ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

## HEAVY AVOCADO PURCHASERS

HEAVY AVOCADO PURCHASERS FIND ALL OF THE ATTRIBUTES TO BE OF HIGH IMPORTANCE.



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

## SUPER HEAVY AVOCADO PURCHASERS

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



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

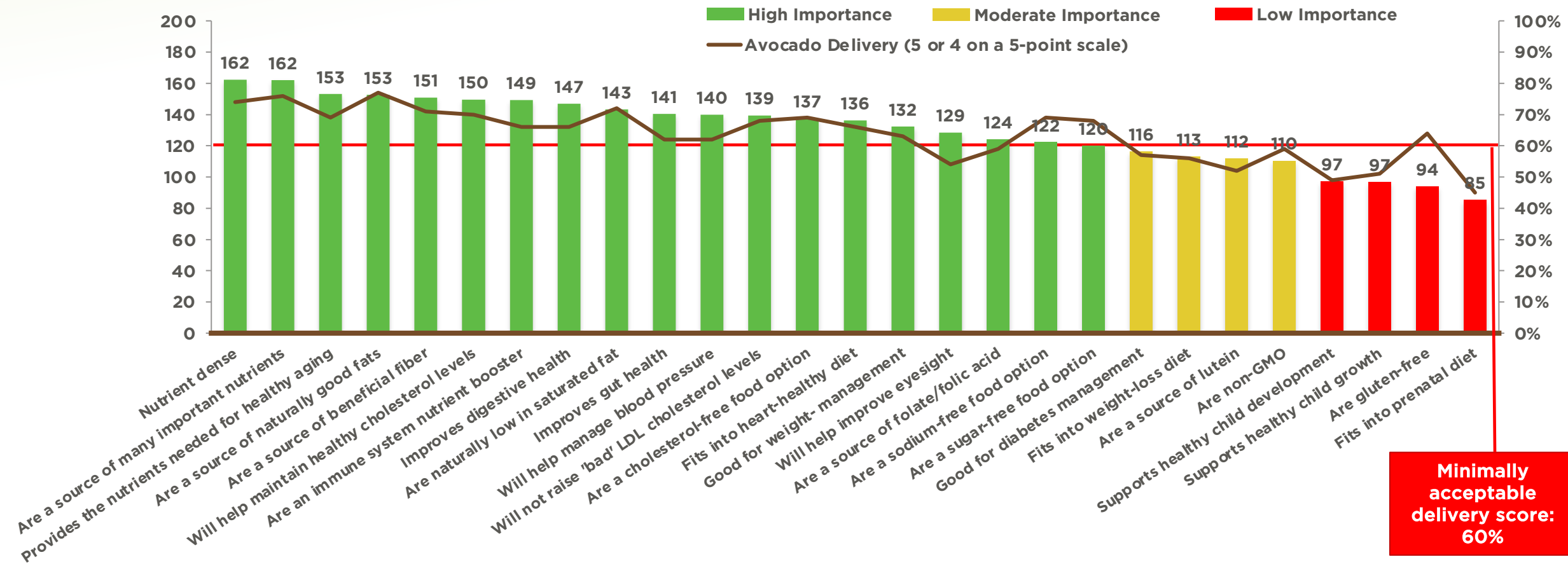
THE RELATIVE IMPORTANCE OF MOST ATTRIBUTES HAS INCREASED SINCE 2019 AMONG AVOCADO PURCHASERS.

THIS WAS DRIVEN BY HEAVY AND SUPER PURCHASERS, WHO HAD ALREADY PLACED HIGHER RELATIVE IMPORTANCE ON EVERYTHING.

	Total Purchasers		Heavy		Super Heavy	
	2019 (n=1,544) A	2021 (n=1,727) B	2019 (n=382) A	2021 (n=440) B	2019 (n=473) A	2021 (n=360) B
Nutrient dense and have lot of vitamins and minerals	170	169	176	175	179	178
Are a source of many important nutrients	168	169	175	176	178	177
Provides the nutrients needed for healthy aging	156	160b	163	167a	169	171
Are a source of naturally good fats	161	163	168	171	172	174
Are a source of beneficial fiber	153	159B	163	167a	168	172a
Will help maintain healthy cholesterol levels	152	157B	159	167A	166	171a
Are an immune system nutrient booster	153	157b	162	167a	168	172
Improves digestive health	151	155b	159	165a	167	171
Are naturally low in saturated fat	149	153B	157	164A	163	169a
Improves gut health	142	149B	150	162A	160	168A
Will help manage blood pressure	141	148B	145	159A	158	166A
Will not raise 'bad' LDL cholesterol levels	142	148B	149	160A	158	164a
Are a cholesterol-free food option	137	147B	144	160A	155	165A
Fits into my/my family member's heart-healthy diet	140	146B	150	159A	159	166a
Good for weight- management	135	141B	142	155A	153	161a
Will help improve eyesight	131	137B	136	152A	151	159a
Are a source of folate/folic acid	127	134B	135	151A	149	159A
Are a sodium-free food option	121	131B	125	148A	142	157A
Are a sugar-free food option	118	129B	119	147A	141	155A
Good for diabetes management	111	125B	114	144A	137	156A
Fits into my/my family member's weight-loss diet	112	124B	120	143A	136	152A
Are a source of lutein	110	123B	117	143A	135	151A
Are non-GMO	112	121B	115	141A	140	150A
Supports healthy child development	99	109B	103	134A	132	147A
Supports healthy child growth	98	109B	103	135A	131	148A
Are gluten-free	85	106B	89	129A	118	141A
Fits into my/my partner's prenatal diet	78	97B	82	123A	112	135A

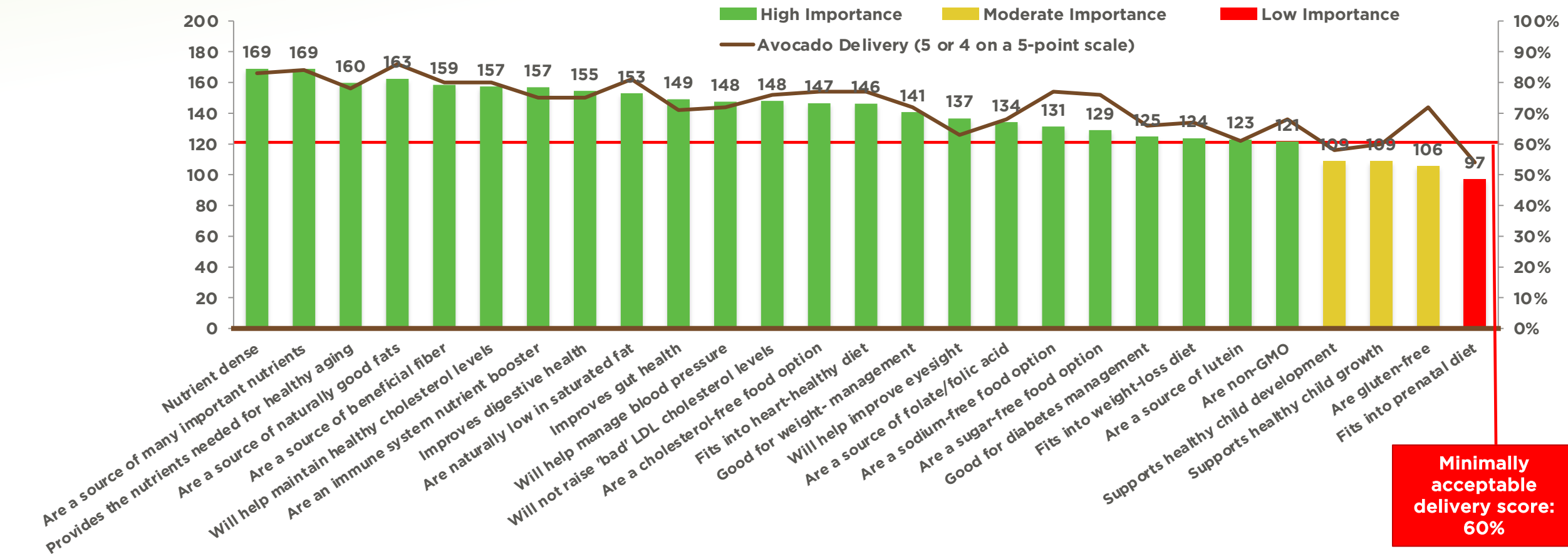
# ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

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.



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

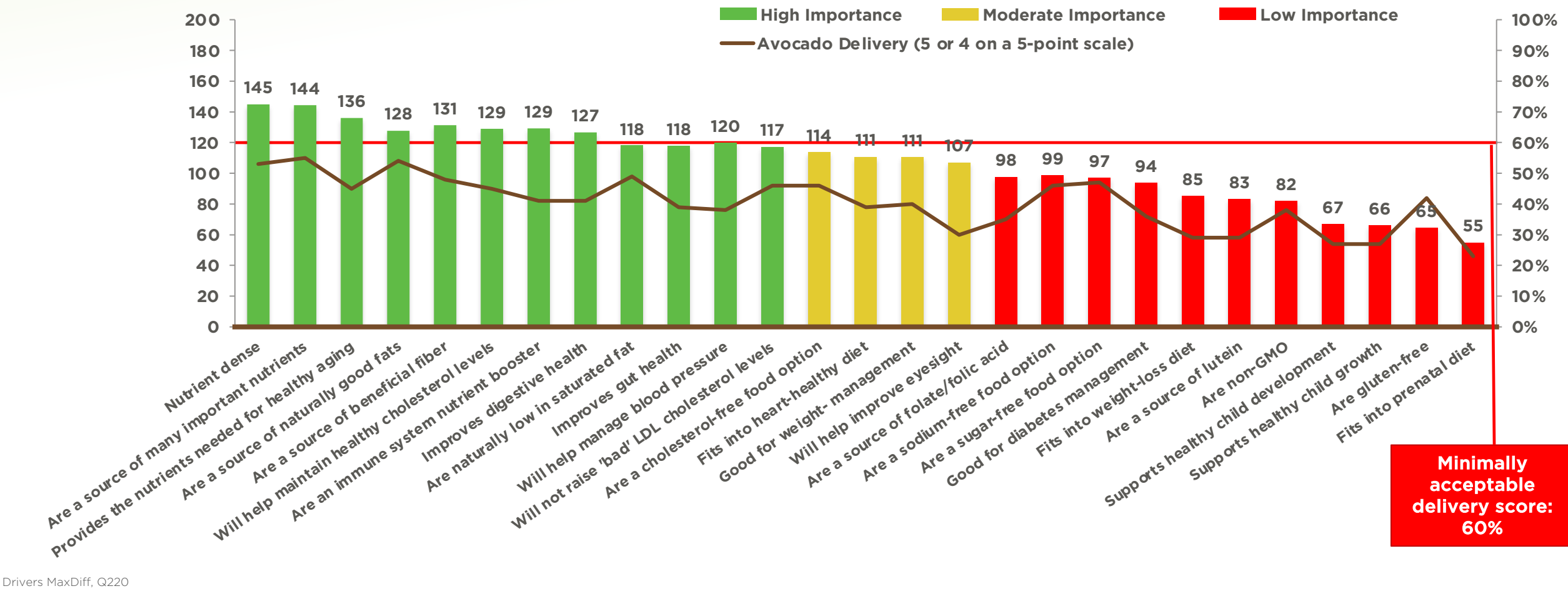
AMONG TOTAL AVOCADO PURCHASERS, AVOCADOS HAVE REASONABLY STRONG PERCEIVED DELIVER AGAINST ALL OF THE MOST IMPORTANT ATTRIBUTES.





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.

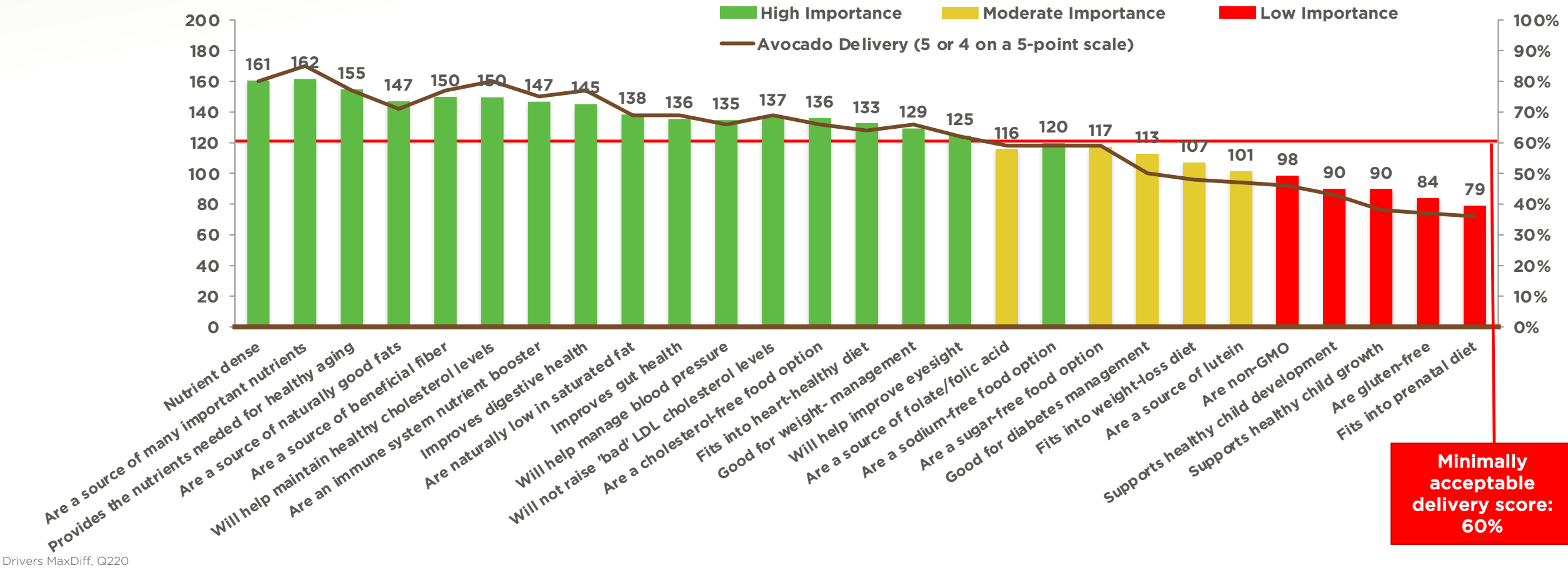




# ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

NON-PURCHASERS WHO ORDER AVOCADOS WHEN AWAY FROM HOME

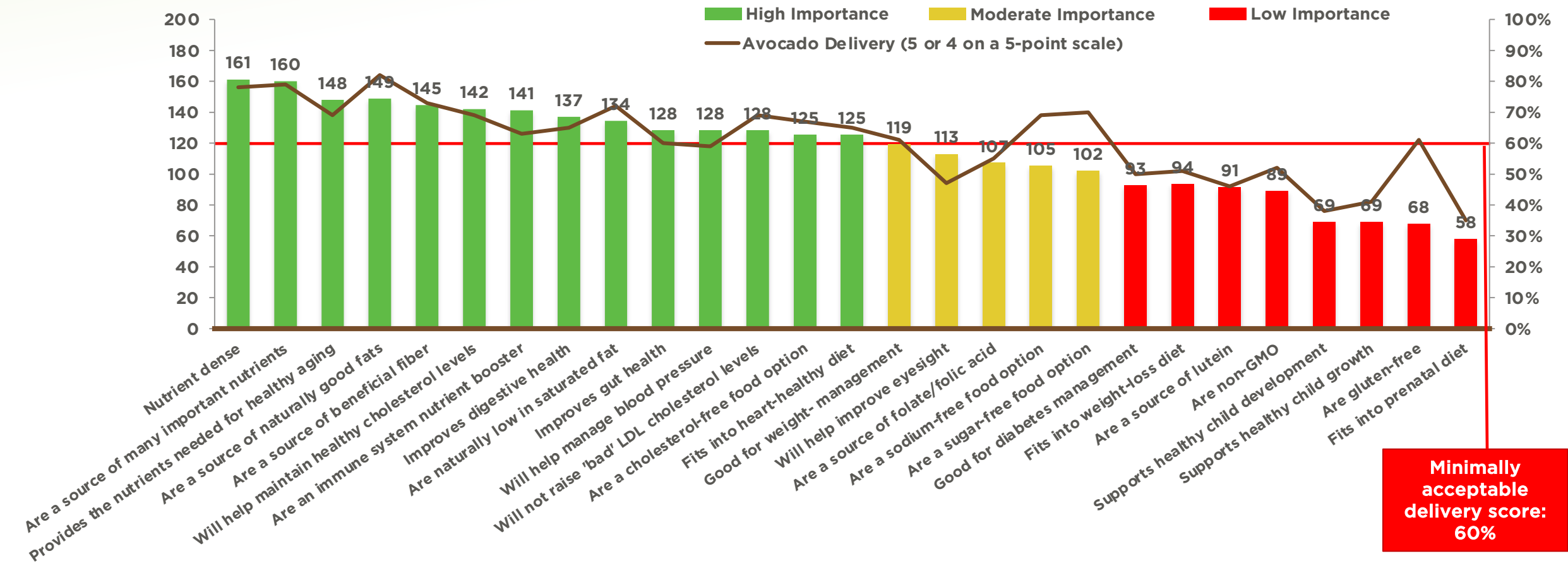
AS SEEN BEFORE, AVOCADOS RECEIVE STRONGER SCORES AMONG NON-PURCHASERS WHO DO ORDER AVOCADOS WHEN AWAY FROM HOME THAN SEEN AMONG NON-PURCHASERS OVERALL.



Minimally acceptable delivery score: 60%

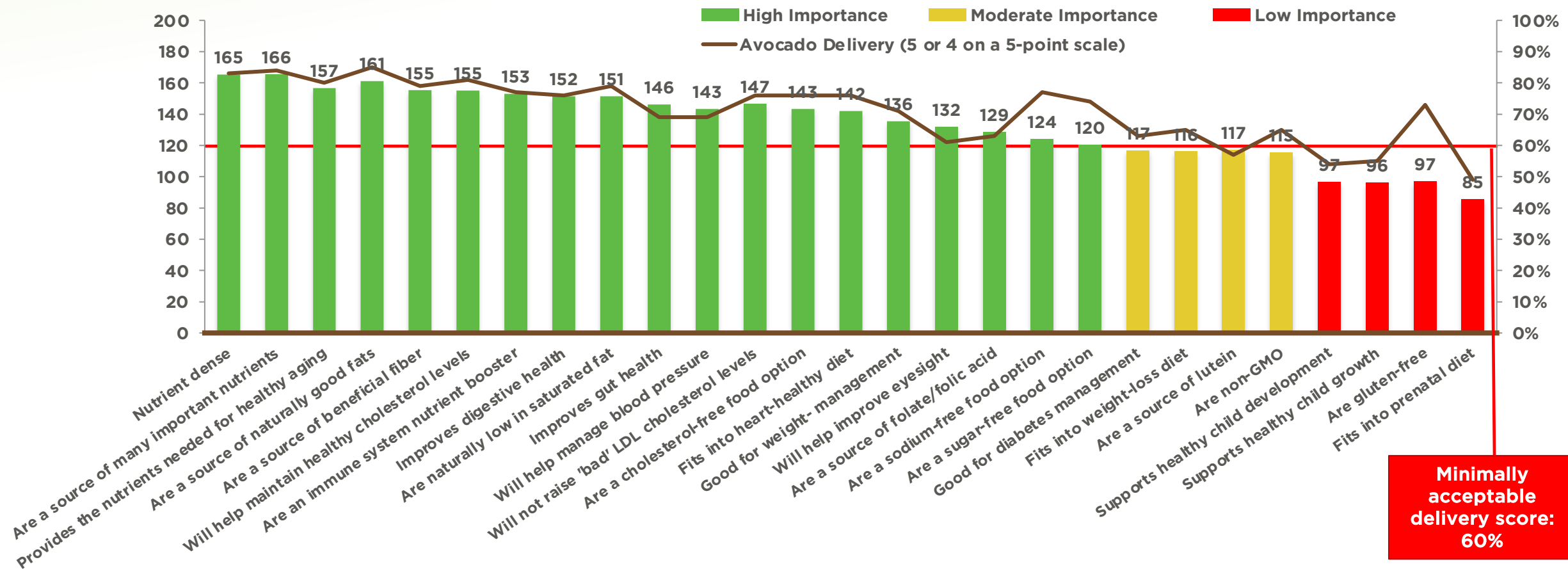
# ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

PERCEPTIONS OF AVOCADOS ARE REASONABLY STRONG AMONG LIGHT PURCHASERS FOR MOST OF THE HIGH IMPORTANCE ATTRIBUTES.



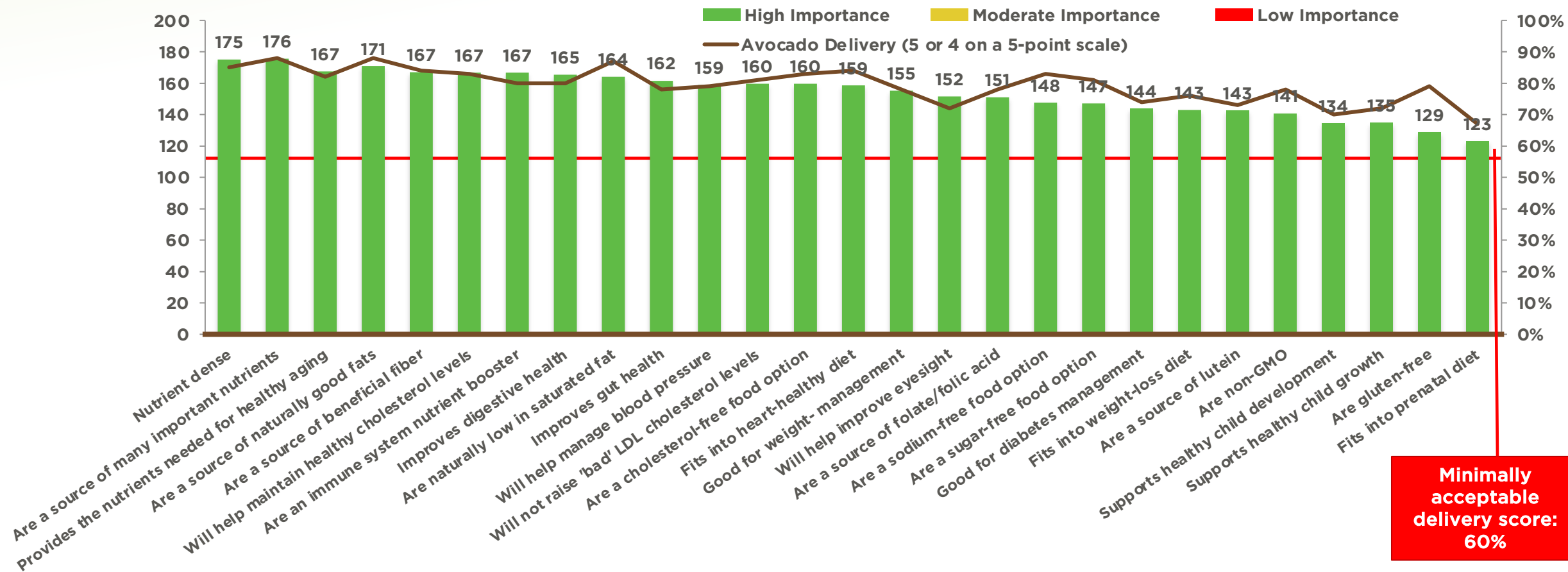
# ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES VS. AVOCADO DELIVERY

AVOCADOS DO REASONABLY WELL FOR THE MOST IMPORTANT ATTRIBUTES AMONG MEDIUM PURCHASERS.



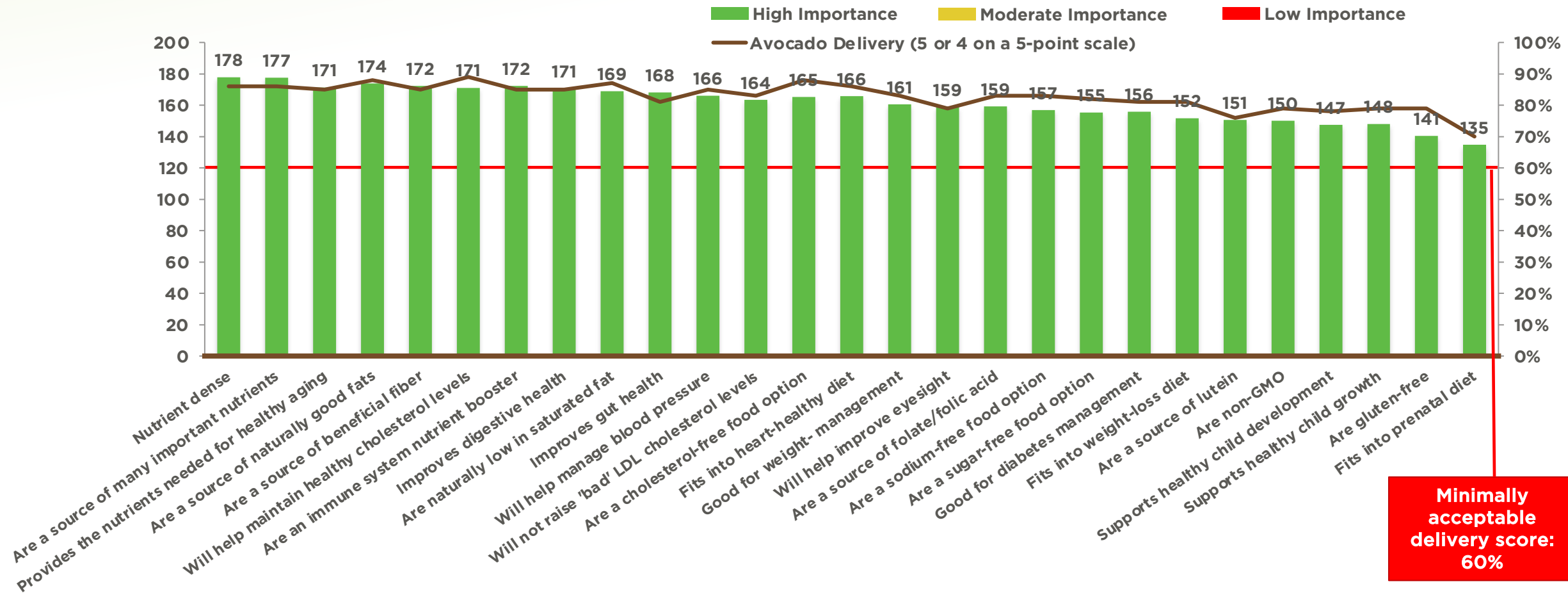
ATTRIBUTES CONSIDERED IMPORTANT WHEN  
DECIDING TO PURCHASE FRESH FRUITS &  
VEGETABLES VS. AVOCADO DELIVERY

AVOCADOS HAVE STRONG DELIVER ON ALL OF THE MOST IMPORTANT ATTRIBUTES AMONG  
HEAVY AVOCADO PURCHASERS.



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.





# 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.

	Total Sample (n=2,400) %	Total Purchasers (n=1,727) %	Non- Purchasers (n=683) % A	Light (n=499) % B	Medium (n=418) % C	Heavy (n=440) % D	Super Heavy (n=360) % E
Nutrient dense and have a lot of vitamins and minerals	74	83	53	78A	83AB	85AB	86AB
Are a source of many important nutrients	76	84	55	79A	84AB	88ABc	86AB
Provides the nutrients needed for healthy aging	69	78	45	69A	80AB	82AB	85ABC
Are a source of naturally good fats	77	86	54	82A	85A	88ABc	88ABc
Are a source of beneficial fiber	71	80	48	73A	79AB	84ABc	85ABC
Will help maintain healthy cholesterol levels	70	80	45	69A	81AB	83AB	89ABCD
Are an immune system nutrient booster	66	75	41	63A	77AB	80AB	85ABCd
Improves digestive health	66	75	41	65A	76AB	80ABc	85ABCd
Are naturally low in saturated fat	72	81	49	72A	79AB	87ABC	87ABC
Improves gut health	62	71	39	60A	69AB	78ABC	81ABC
Will help manage blood pressure	62	72	38	59A	69AB	79ABC	85ABCD
Will not raise "bad" LDL cholesterol levels	68	76	46	69A	76AB	81ABc	83ABC
Are a cholesterol-free food option	69	77	46	67A	76AB	83ABC	88ABCd
Fits into my/my family member's heart-healthy diet	66	77	39	65A	76AB	84ABC	86ABC
Good for weight management	63	72	40	61A	71AB	78ABC	83ABCd
Will help improve eyesight	54	63	30	47A	61AB	72ABC	79ABCD
Are a source of folate/ folic acid	59	68	35	55A	63AB	78ABC	83ABCd
Are a sodium-free food option	69	77	46	69A	77AB	83ABC	83ABC
Are a sugar-free food option	68	76	47	70A	74Ab	81ABC	82ABC
Good for diabetes management	57	66	36	50A	63AB	74ABC	81ABCD
Fits into my/my family member's weight-loss diet	56	67	29	51A	65AB	76ABC	81ABCd
Are a source of lutein	52	61	29	46A	57AB	73ABC	76ABC
Are non-GMO	59	68	38	52A	65AB	78ABC	79ABC
Supports healthy child development	49	58	27	38A	54AB	70ABC	78ABCD
Supports healthy child growth	51	60	27	41A	55AB	72ABC	79ABCD
Are gluten-free	64	72	42	61A	73AB	79ABC	79ABC
Fits into my/my partner's prenatal diet	45	54	23	35A	49AB	67ABC	70ABC

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."



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

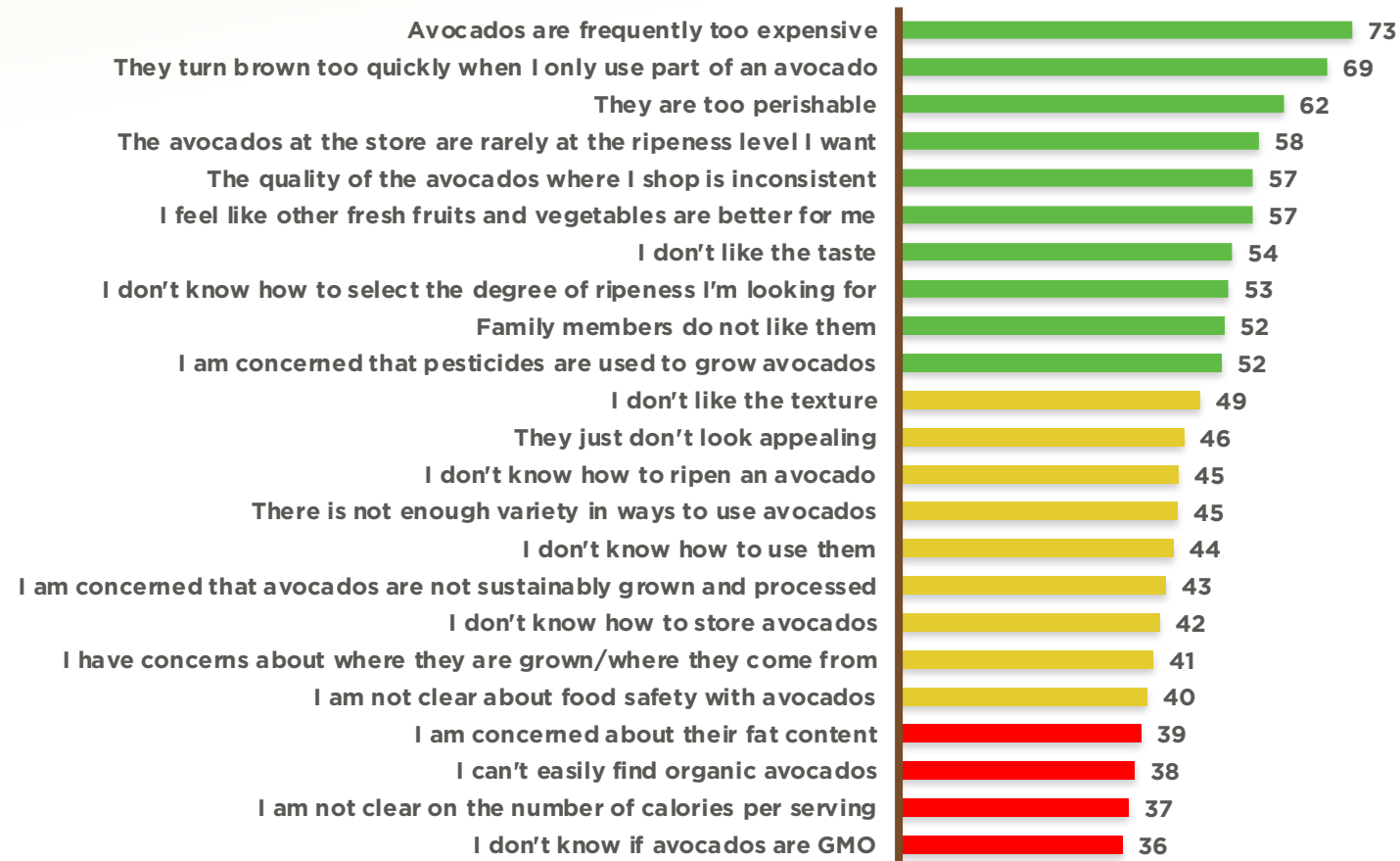
AVOCADOS’  
PERFORMANCE  
AGAINST ALL OF THE  
ATTRIBUTES IS AS  
STRONG OR  
STRONGER THAN SEEN  
IN 2019 ACROSS THE  
PURCHASER  
SEGMENTS.

	Light		Medium		Heavy		Super Heavy	
	2019 (n=297)	2021 (n=499)	2019 (n=384)	2021 (n=418)	2019 (n=382)	2021 (n=440)	2019 (n=473)	2021 (n=360)
	% A	% B	% A	% B	% A	% B	% A	% B
Nutrient dense and have lot of vitamins and minerals	77	78	81	83	87	85	90b	86
Are a source of many important nutrients	76	79	85	84	90	88	91B	86
Provides the nutrients needed for healthy aging	66	69	75	80a	82	82	85	85
Are a source of naturally good fats	82	82	85	85	90	88	89	88
Are a source of beneficial fiber	65	73A	80	79	85	84	85	85
Will help maintain healthy cholesterol levels	64	69a	75	81A	81	83	85	89a
Are an immune system nutrient booster	62	63	69	77A	79	80	82	85
Improves digestive health	57	65A	71	76a	76	80a	83	85
Are naturally low in saturated fat	69	72	75	79a	84	87a	87	87
Improves gut health	53	60a	67	69	74	78	79	81
Will help manage blood pressure	53	59a	61	69A	70	79A	78	85A
Will not raise 'bad' LDL cholesterol levels	69	69	70	76a	79	81	81	83
Are a cholesterol-free food option	64	67	71	76a	77	83A	79	88A
Fits into my/my family member's heart-healthy diet	60	65a	70	76a	80	84a	84	86
Good for weight- management	55	61a	68	71	77	78	81	83
Will help improve eyesight	39	47A	53	61A	64	72A	74	79a
Are a source of folate/folic acid	51	55	64	63	73	78a	75	83A
Are a sodium-free food option	62	69a	70	77A	82	83	78	83a
Are a sugar-free food option	64	70a	75	74	80	81	81	82
Good for diabetes management	46	50	58	63a	64	74A	72	81A
Fits into my/my family member's weight-loss diet	44	51a	61	65	71	76a	76	81a
Are a source of lutein	43	46	52	57	64	73A	73	76
Are non-GMO	49	52	58	65A	66	78A	75	79
Supports healthy child development	33	38a	53	54	59	70A	71	78A
Supports healthy child growth	35	41a	52	55	63	72A	71	79A
Are gluten-free	53	61A	65	73A	74	79a	78	79
Fits into my/my partner's prenatal diet	26	35A	39	49A	50	67A	65	70a

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."

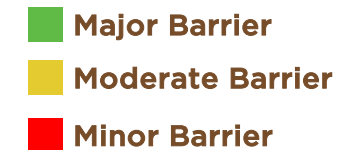
# BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

FREQUENTLY BEING TOO EXPENSIVE IS THE TOP BARRIER TO PURCHASING AVOCADOS. TURNING BROWN TOO QUICKLY WHEN PARTIALLY USED IS A STRONG SECONDARY BARRIER. THE REMAINING MAJOR BARRIERS ARE SIMILAR TO 2019 WITH THE EXCEPTION OF CONCERN ABOUT PESTICIDES. THIS MOVED FROM MODERATE TO MAJOR IMPORTANCE..



Anchor: 100

Significant difference = 4 pts  
Directional difference = 3 pts



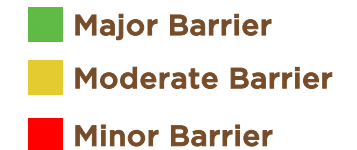
# BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

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.



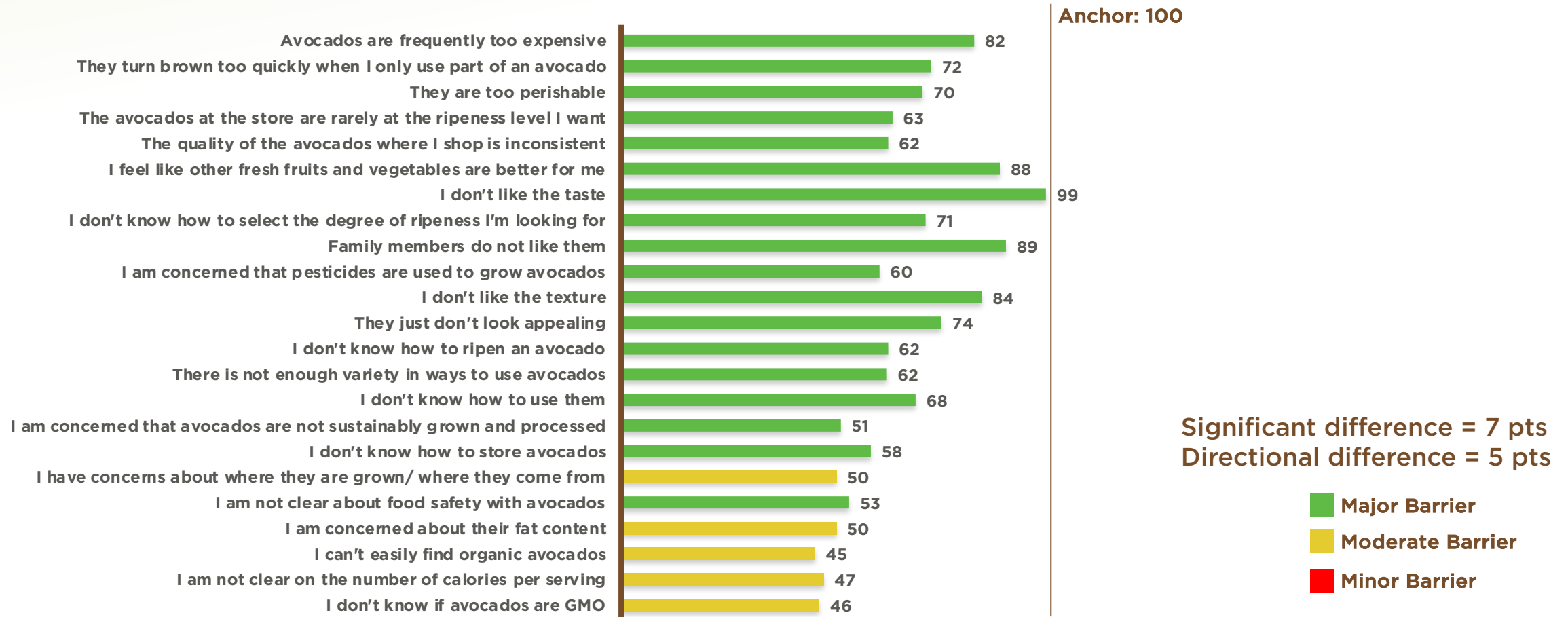
Anchor: 100

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

NON-PURCHASERS WHO ORDER  
AVOCADOS WHEN AWAY FROM HOME

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.



Anchor: 100

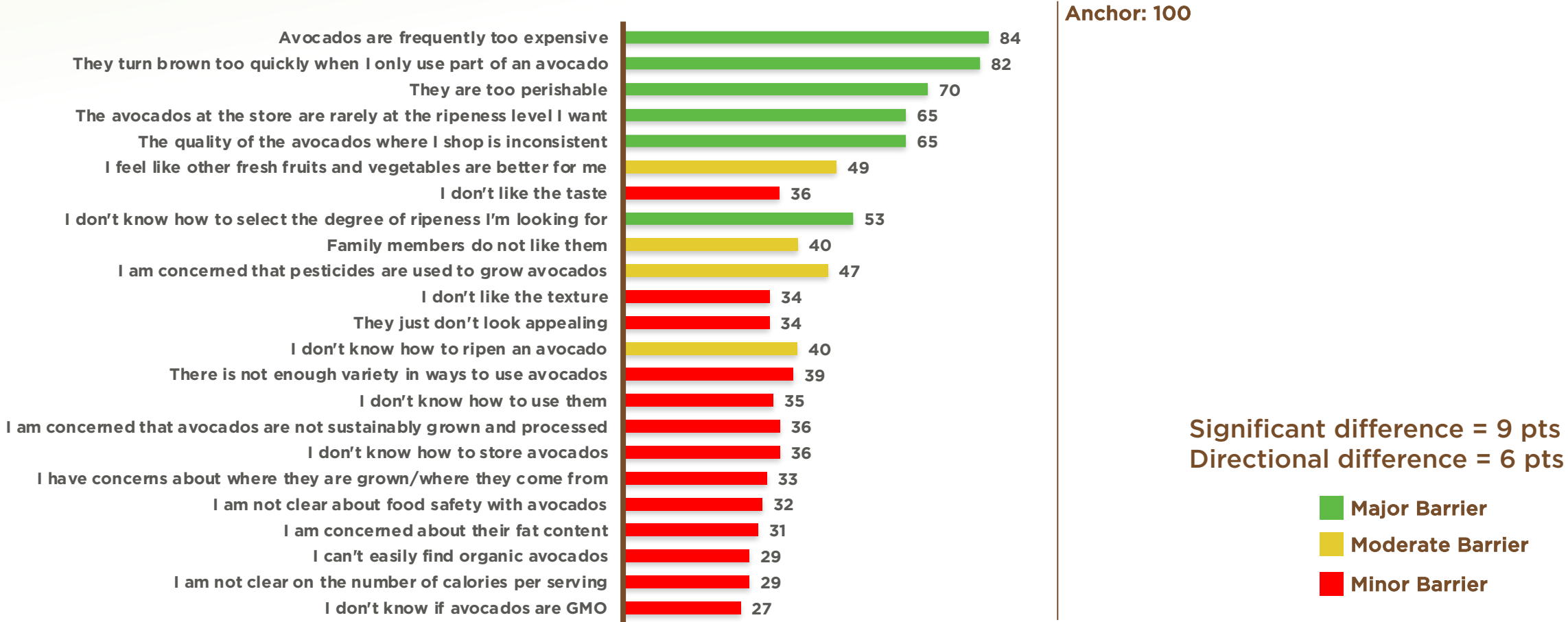
Proportion of Non-Purchasers  
who order avocados when  
away from home:  
21%

Significant difference = 16 pts  
Directional difference = 11 pts

- Major Barrier
- Moderate Barrier
- Minor Barrier

# BARRIERS TO PURCHASING AVOCADOS MORE OFTEN

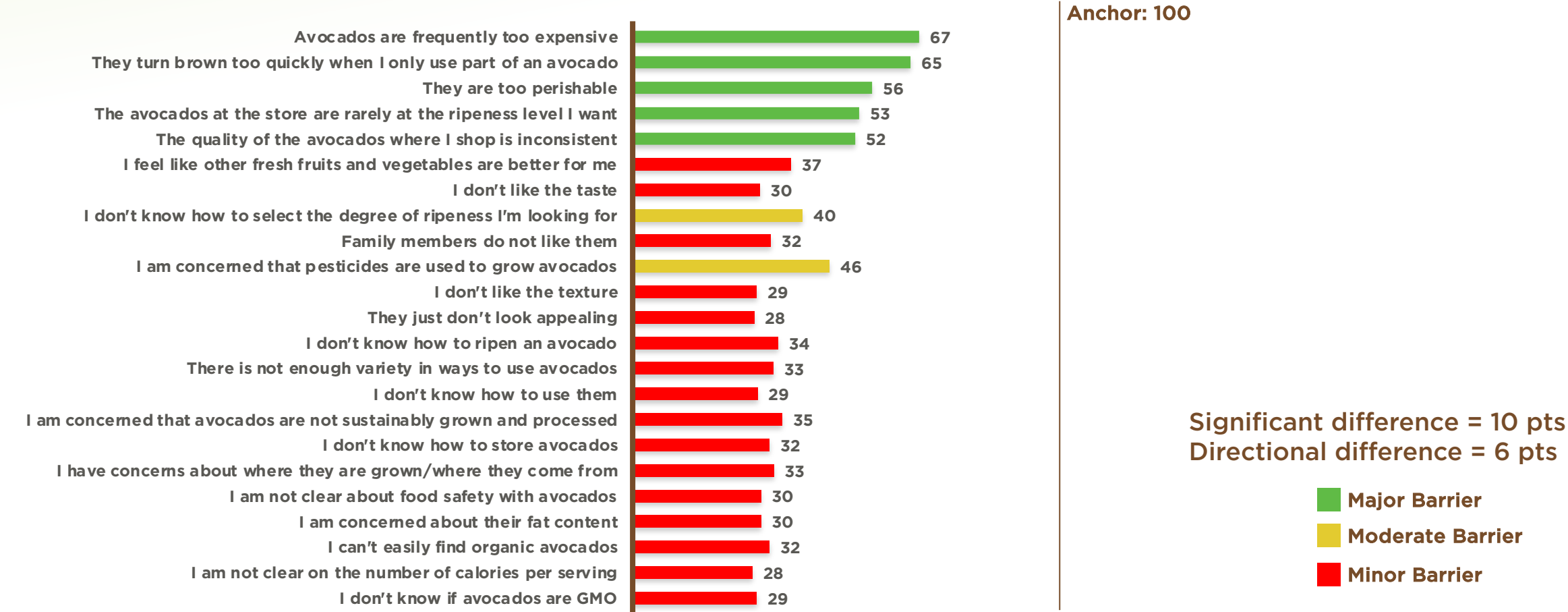
FREQUENTLY BEING TOO EXPENSIVE AND TURNING BROWN TOO QUICKLY ARE THE TOP BARRIERS FOR LIGHT PURCHASERS. BEING TOO PERISHABLE IS A STRONG SECONDARY BARRIER.





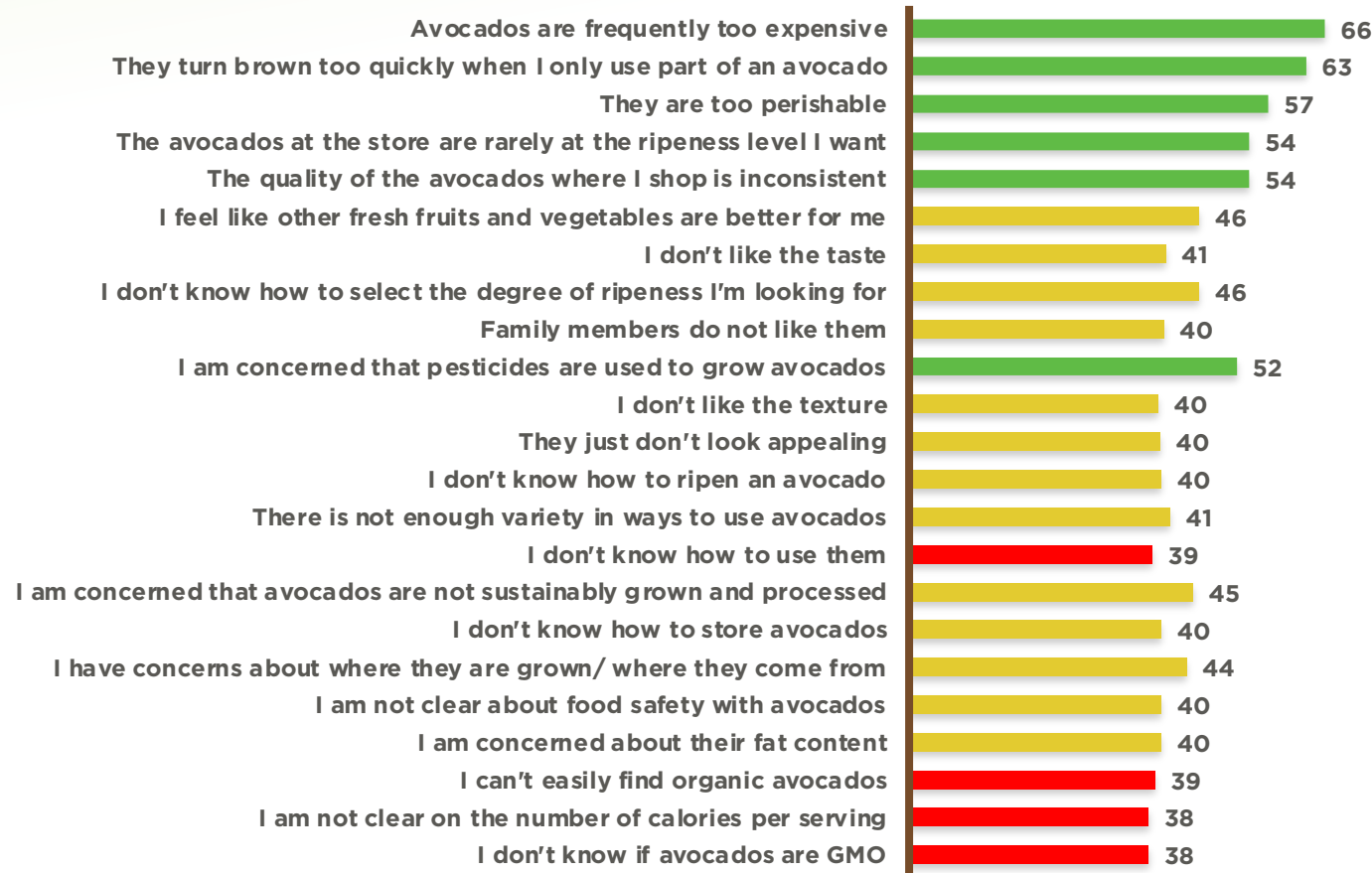
# BARRIERS TO PURCHASING AVOCADOS MORE OFTEN

FREQUENTLY BEING TOO EXPENSIVE AND TURNING BROWN TOO QUICKLY ARE TOP BARRIERS FOR MEDIUM PURCHASERS.



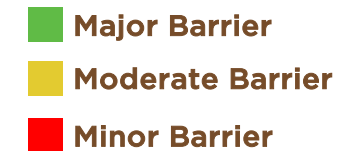
# BARRIERS TO PURCHASING AVOCADOS MORE OFTEN

FREQUENTLY BEING TOO EXPENSIVE AND TURNING BROWN TOO QUICKLY ARE ALSO THE TOP BARRIERS FOR HEAVY PURCHASERS.



Anchor: 100

Significant difference = 9 pts  
Directional difference = 6 pts



# BARRIERS TO PURCHASING AVOCADOS MORE OFTEN

THE ONLY MAJOR BARRIERS FOR SUPER HEAVY PURCHASERS HAVE TYPICALLY BEEN FREQUENTLY BEING TOO EXPENSIVE AND TURNING BROWN TOO QUICKLY WHEN PARTIALLY USED. THIS YEAR, BEING TOO PERISHABLE AND NOT AT DESIRED RIPENESS LEVEL AT THE STORE MOVED UP TO BEING A MAJOR BARRIER.



# 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 (n=2,400)	Total Purchasers (n=1,727)	Non- Purchasers (n=683) A	Light (n=499) B	Medium (n=418) C	Heavy (n=440) D	Super Heavy (n=360) E
Avocados are frequently too expensive	73	70	82CDE	84CDE	67e	66e	59
They turn brown too quickly when I only use part of an avocado	69	67	72cDE	82ACDE	65e	63e	56
They are too perishable	62	59	70CDE	70CDE	56e	57e	50
The avocados at the store are rarely at the ripeness level I want	58	56	63CDE	65CDE	53	54	51
The quality of the avocados where I shop is inconsistent	57	56	62CdE	65CDE	52	54	50
I feel like other fresh fruits and vegetables are better for me	57	44	88BCDE	49Ce	37	46C	42
I don't like the taste	54	36	99BCDE	36c	30	41bC	37c
I don't know how to select the degree of ripeness I'm looking for	53	46	71BCDE	53CdE	40	46c	45
Family members do not like them	52	38	89BCDE	40C	32	40C	38c
I am concerned that pesticides are used to grow avocados	52	49	60BCDe	47	46	52bc	52bc
I don't like the texture	49	34	84BCDE	34c	29	40bC	36c
They just don't look appealing	46	34	74BCDE	34c	28	40bC	37C
I don't know how to ripen an avocado	45	38	62BCDE	40c	34	40c	38
There is not enough variety in ways to use avocados	45	38	62BCDE	39C	33	41C	39c
I don't know how to use them	44	35	68BCDE	35c	29	39C	36c
I am concerned that avocados are not sustainably grown and processed	43	39	51BCdE	36	35	45BC	43bc
I don't know how to store avocados	42	36	58BCDE	36	32	40C	38c
I am not clear about food safety with avocados	40	34	53BCDE	32	30	40BC	37bc

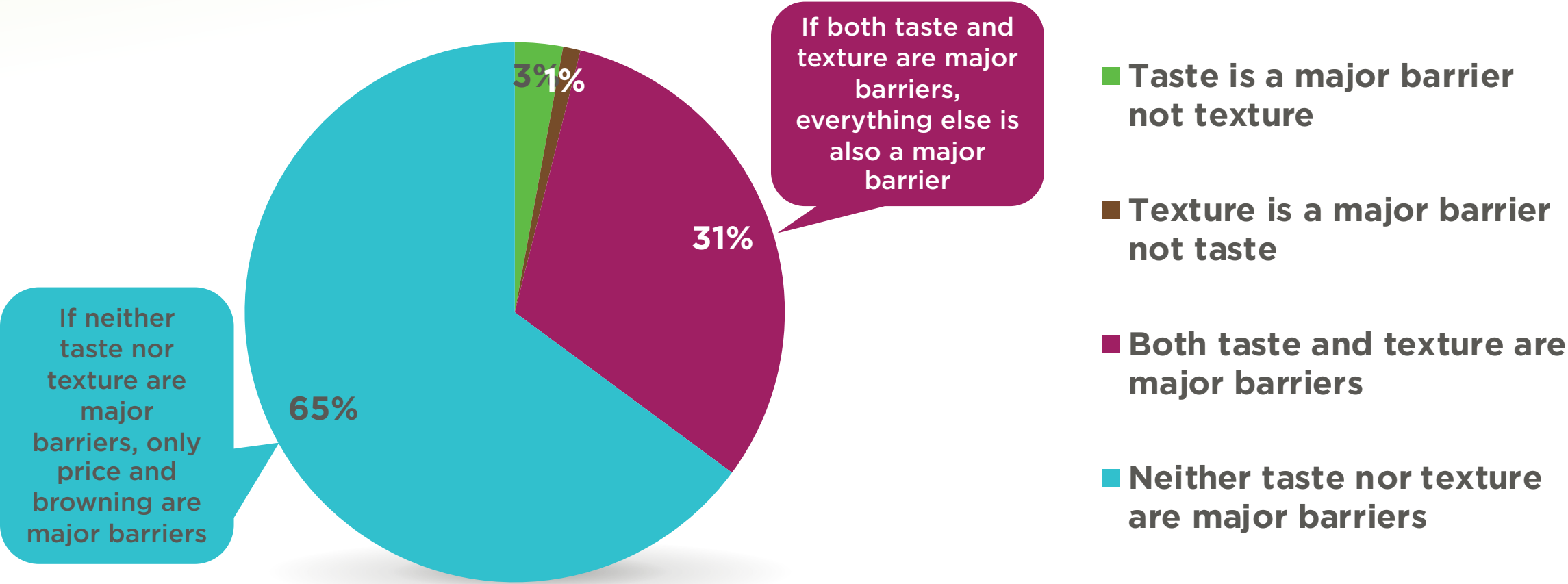
# BARRIERS TO PURCHASING AVOCADOS MORE OFTEN

SEVERAL POTENTIAL BARRIERS, WHILE NOT HIGH ENOUGH TO BE CONSIDERED MAJOR BARRIERS, DID SEEN INCREASES THIS YEAR – ESPECIALLY AMONG HEAVY AND SUPER PURCHASERS.

	Light		Medium		Heavy		Super Heavy	
	2019 (n=297)	2021 (n=499)	2019 (n=384)	2021 (n=418)	2019 (n=382)	2021 (n=440)	2019 (n=473)	2021 (n=360)
	% A	% B	% A	% B	% A	% B	% A	% B
I don't like the taste	38	36	25	30a	23	41A	29	37A
I don't like the texture	34	34	24	29a	22	40A	29	36a
They just don't look appealing	32	34	24	28a	23	40A	28	37A
Family members do not like them	45b	40	29	32	25	40A	31	38a
I don't know how to use them	39	35	26	29	22	39A	28	36A
There is not enough variety in ways to use avocados	40	39	29	33a	26	41A	31	39A
I don't know how to select the degree of ripeness I'm looking for	52	53	40	40	35	46A	36	45A
I don't know how to ripen an avocado	39	40	30	34	28	40A	32	38a
The avocados at the store are rarely at the ripeness level I want	57	65A	54	53	54	54	48	51
They are too perishable	76	70	59	56	55	57	49	50
They turn brown too quickly when I only use part of an avocado	85	82	69	65	64	63	55	56
I don't know how to store avocados	39	36	28	32	27	40A	31	38a
The quality of the avocados where I shop is inconsistent	57	65a	55	52	55	54	49	50
I can't easily find organic avocados	27	29	26	32A	23	39A	32	39a
Avocados are frequently too expensive	85	84	83B	67	75b	66	65	59
I am concerned about their fat content	30	31	25	30a	22	40A	31	37a
I am not clear on the number of calories per serving	26	29	23	28a	21	38A	28	38A
I am not clear about food safety with avocados	30	32	26	30a	24	40A	32	37a
I don't know if avocados are GMO	26	27	25	29	22	38A	31	39a
I have concerns about where they are grown/ where they come from	29	33a	26	33A	25	44A	33	42A
I am concerned that avocados are not sustainably grown and processed	27	36A	26	35A	23	45A	32	43A
I am concerned that pesticides are used to grow avocados	42	47	40	46a	39	52A	44	52A
I feel like other fresh fruits and vegetables are better for me	48	49	32	37a	30	46A	33	42A

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

AS SEEN BEFORE, 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.

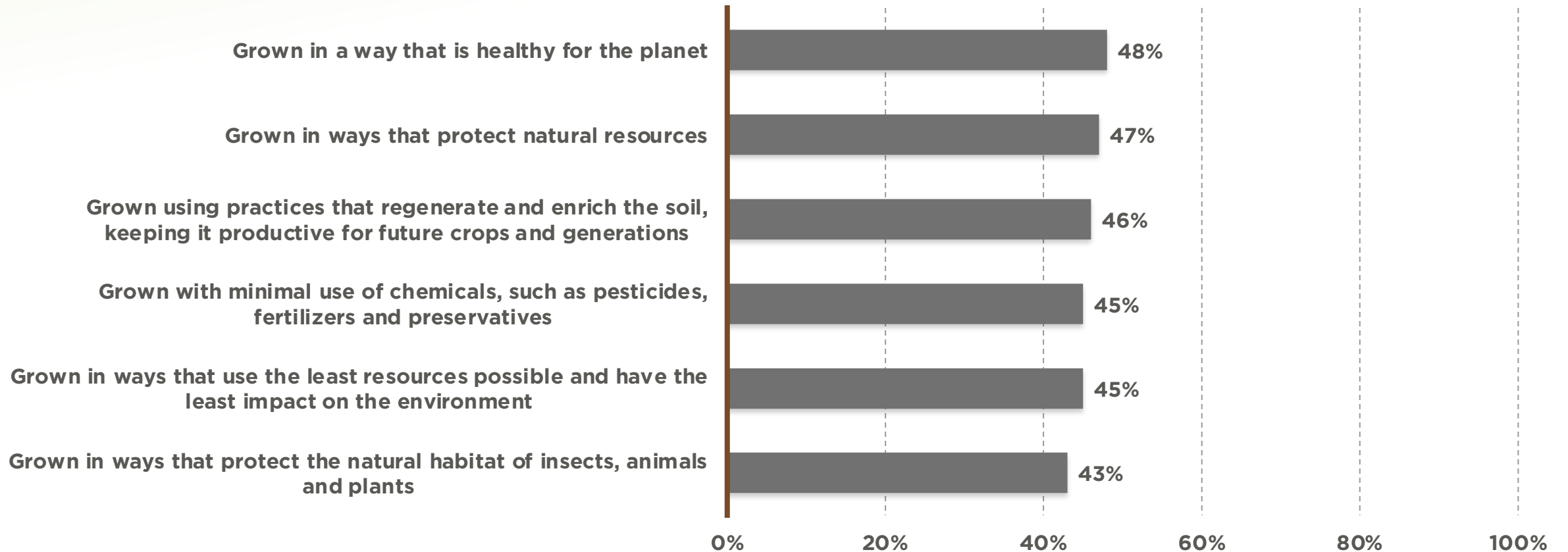




# SUSTAINABILITY

# SUSTAINABILITY STATEMENTS ASSOCIATED WITH AVOCADOS (5 OR 4 ON A 5-POINT SCALE) (TOTAL SAMPLE)

AVOCADOS HAVE MODERATELY STRONG ASSOCIATION OVERALL WITH GOOD SUSTAINABILITY PRACTICES.



Q320 – How much do you associate the following social and environmental sustainability issues with avocados?

# STATEMENTS ASSOCIATED WITH AVOCADOS

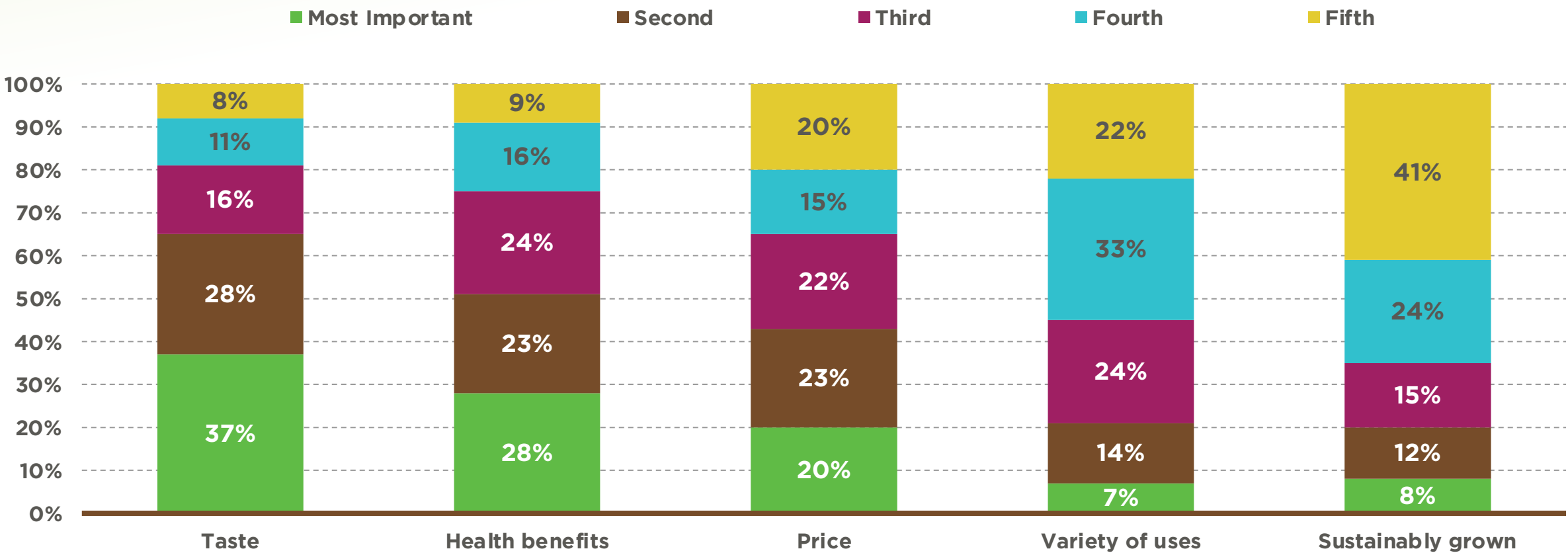
( 5 OR 4 ON A 5-POINT SCALE )

AVOCADOS HAVE MUCH STRONGER ASSOCIATION WITH GOOD SUSTAINABILITY PRACTICES AMONG HEAVY, AND ESPECIALLY SUPER AVOCADO PURCHASERS.

	Total Purchasers (n=1,727) %	Non-Purchasers (n=683) % A	Light (n=499) % B	Medium (n=418) % C	Heavy (n=440) % D	Super Heavy (n=3601) % E
Grown in a way that is healthy for the planet	57	26	37A	57AB	66ABC	73ABCD
Grown in ways that protect natural resources	55	24	37A	55AB	62ABC	73ABCD
Grown using practices that regenerate and enrich the soil, keeping it productive for future crops and generations	54	24	36A	52AB	64ABC	69ABCd
Grown with minimal use of chemicals, such as pesticides, fertilizers and preservatives	53	25	34A	51AB	63ABC	68ABCd
Grown in ways that use the least resources possible and have the least impact on the environment	53	22	33A	54AB	65ABC	68ABC
Grown in ways that protect the natural habitat of insects, animals and plants	51	23	31A	52AB	60ABC	68ABCD

# IMPORTANCE RANKING OF AVOCADO ATTRIBUTES (TOTAL SAMPLE)

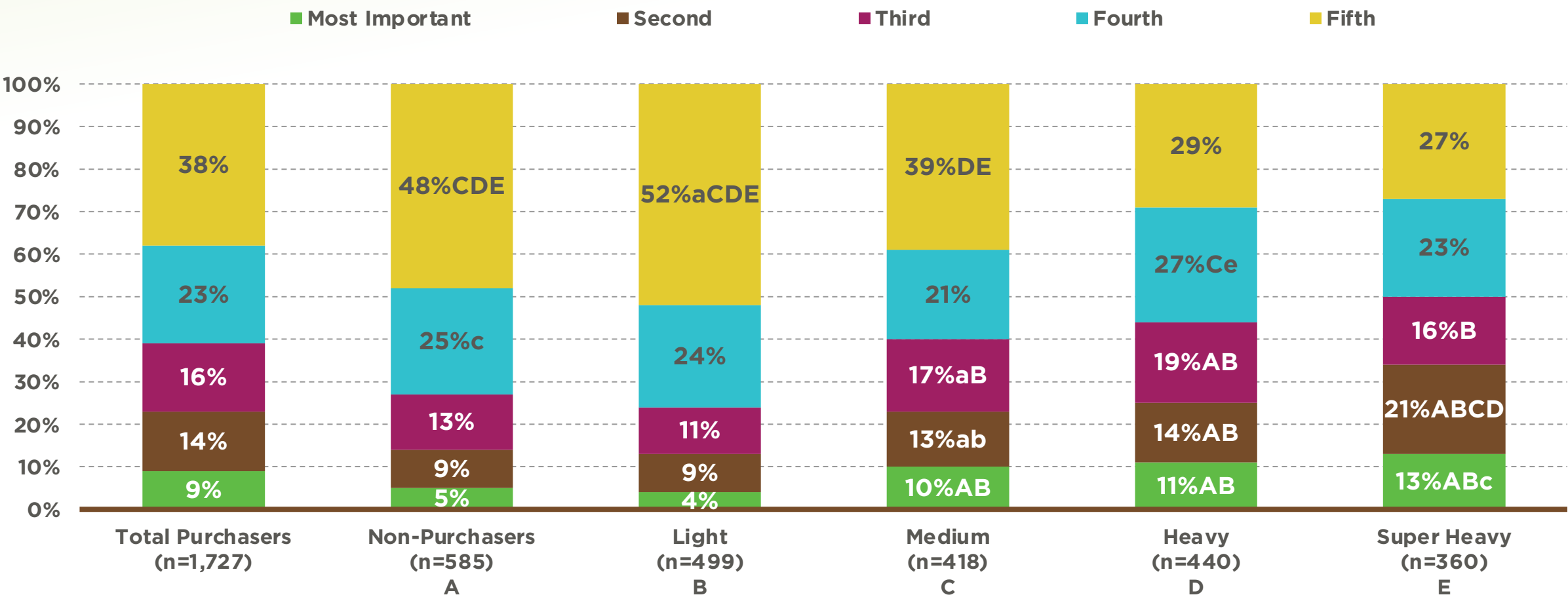
TASTE AND HEALTH BENEFITS OF AVOCADOS DOMINATE OVERALL. SUSTAINABLY GROWN IS LEAST IMPORTANT.



Q330 – Please rank how important the following are to you when it comes to avocados?

# IMPORTANCE RANKING OF SUSTAINABLY GROWN

WHILE STILL LOW, THE IMPORTANCE OF AVOCADOS BEING SUSTAINABLY GROWN INCREASES WITH INCREASED AVOCADO PURCHASE LEVELS.



Q330 – Please rank how important the following are to you when it comes to avocados?



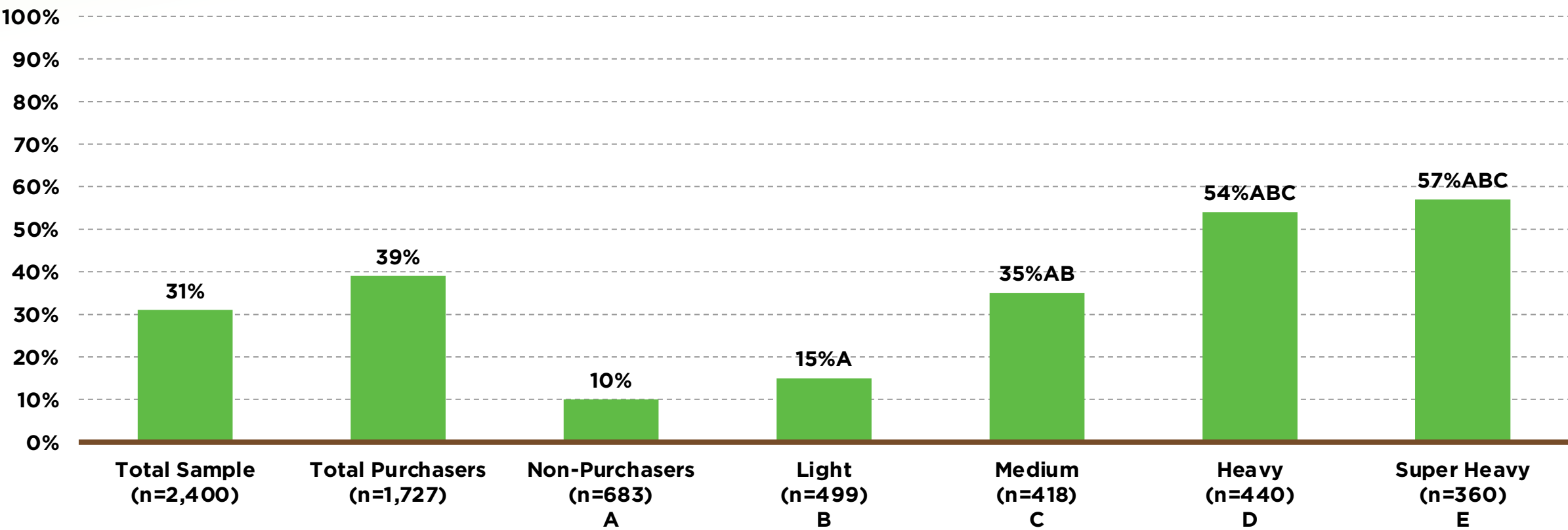
# COMMUNICATIONS





# SEEN “LOVE ONE TODAY” LOGO IN PAST YEAR

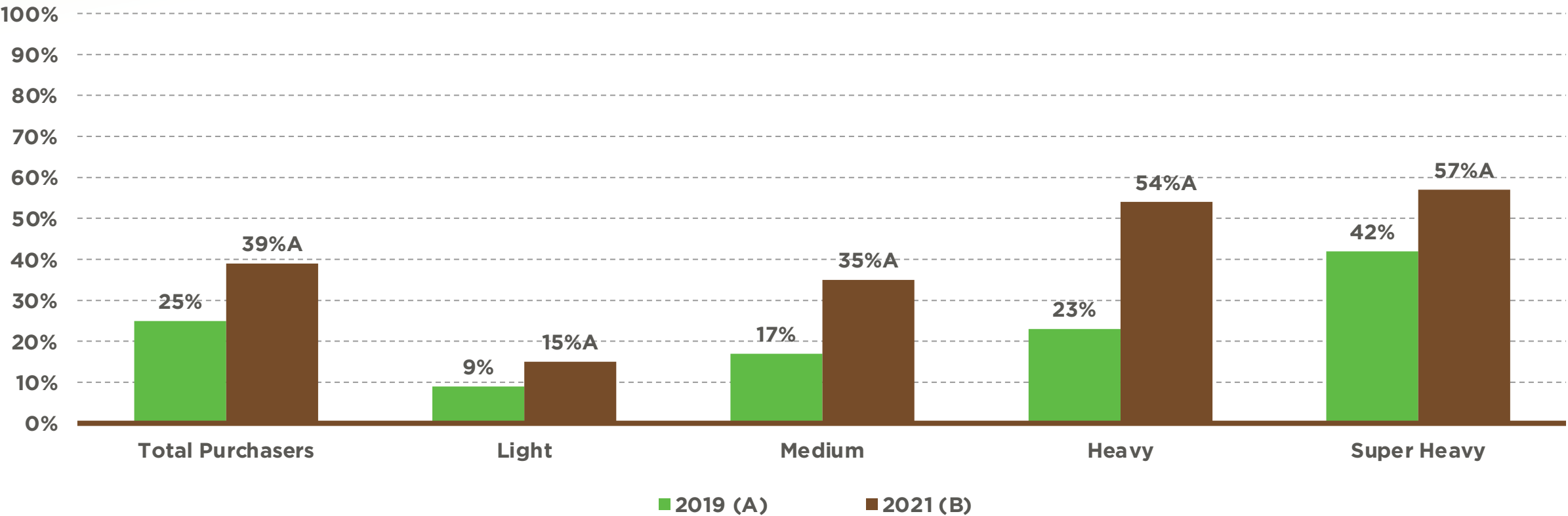
WHILE THERE IS AMPLE OPPORTUNITY TO GROW AWARENESS OF THE “LOVE ONE TODAY” LOGO, IT DOES IMPROVE AS AVOCADO PURCHASE LEVELS INCREASE.



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

# SEEN “LOVE ONE TODAY” LOGO IN PAST YEAR

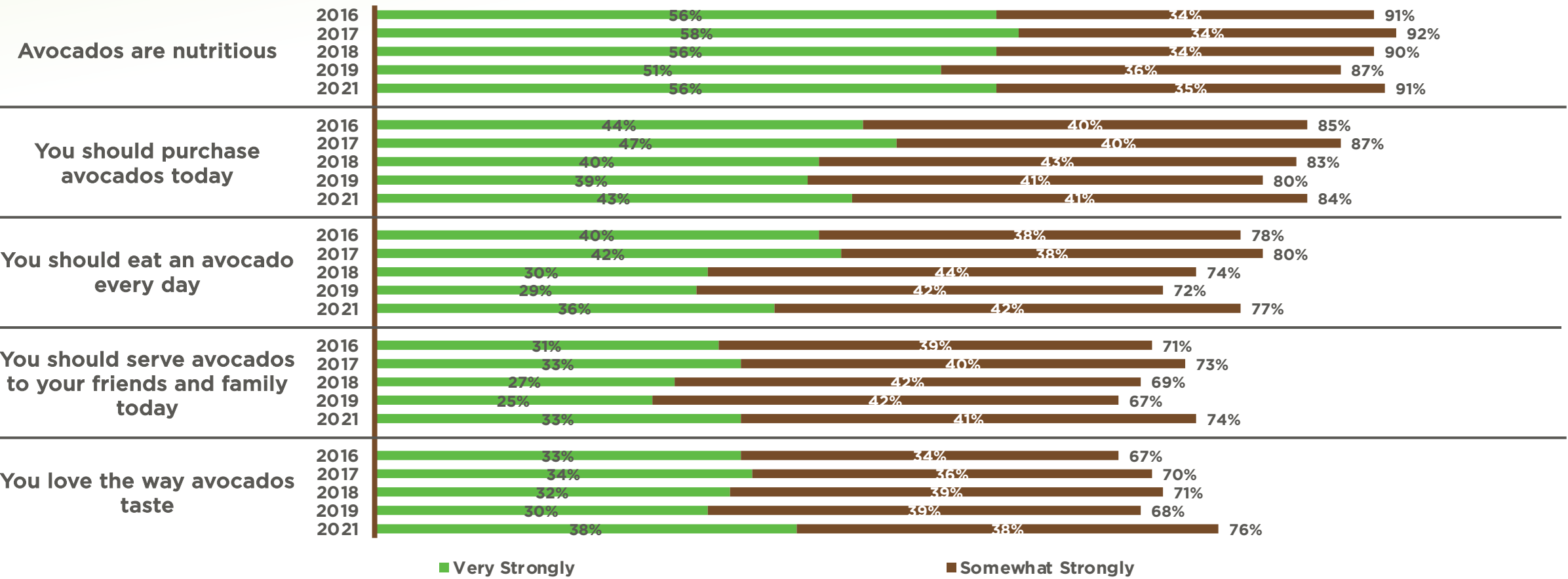
THERE HAS BEEN NICE GROWTH IN AWARENESS OF THE “LOVE ONE TODAY” LOGO SINCE 2019. WHILE SEEN ACROSS ALL PURCHASER SEGMENTS, THE BIGGEST INCREASE WAS SEEN AMONG HEAVY PURCHASERS.



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.



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

# STATEMENTS LOGO COMMUNICATED (2021 ONLY) (VERY/SOMEWHAT STRONGLY)

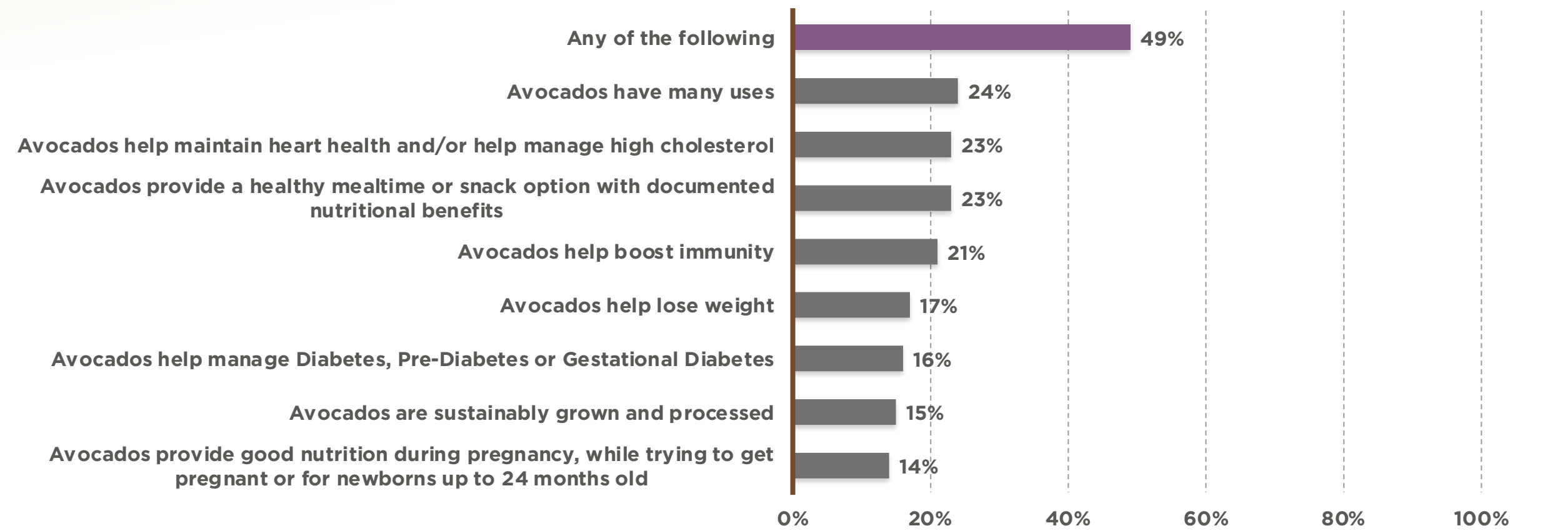
MESSAGES COMMUNICATED GENERALLY INCREASE AS AVOCADO PURCHASE LEVELS INCREASE.

	Total Purchasers (n=1,727) %	Non-Purchasers (n=683) % A	Light (n=499) % B	Medium (n=418) % C	Heavy (n=440) % D	Super Heavy (n=360) % E
Avocados are nutritious	61	42	58A	61A	62A	67ABcd
You should purchase avocados today	48	31	37A	46AB	53ABC	59ABCd
You should eat an avocado every day	41	23	27a	36AB	49ABC	57ABCD
You should serve avocados to your friends and family today	40	17	23A	38AB	47ABC	56ABCD
You love the way avocados taste	45	20	32A	42AB	51ABC	58ABCD

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

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

MESSAGES ABOUT THE MANY USES FOR AVOCADOS, HEART HEALTH, A HEALTHY MEALTIME OR SNACK OPTION AND BOOSTING IMMUNITY ARE MOST COMMONLY RECALLED.



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 BENEFITS SEEN OR HEARD IN PAST FEW MONTHS

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

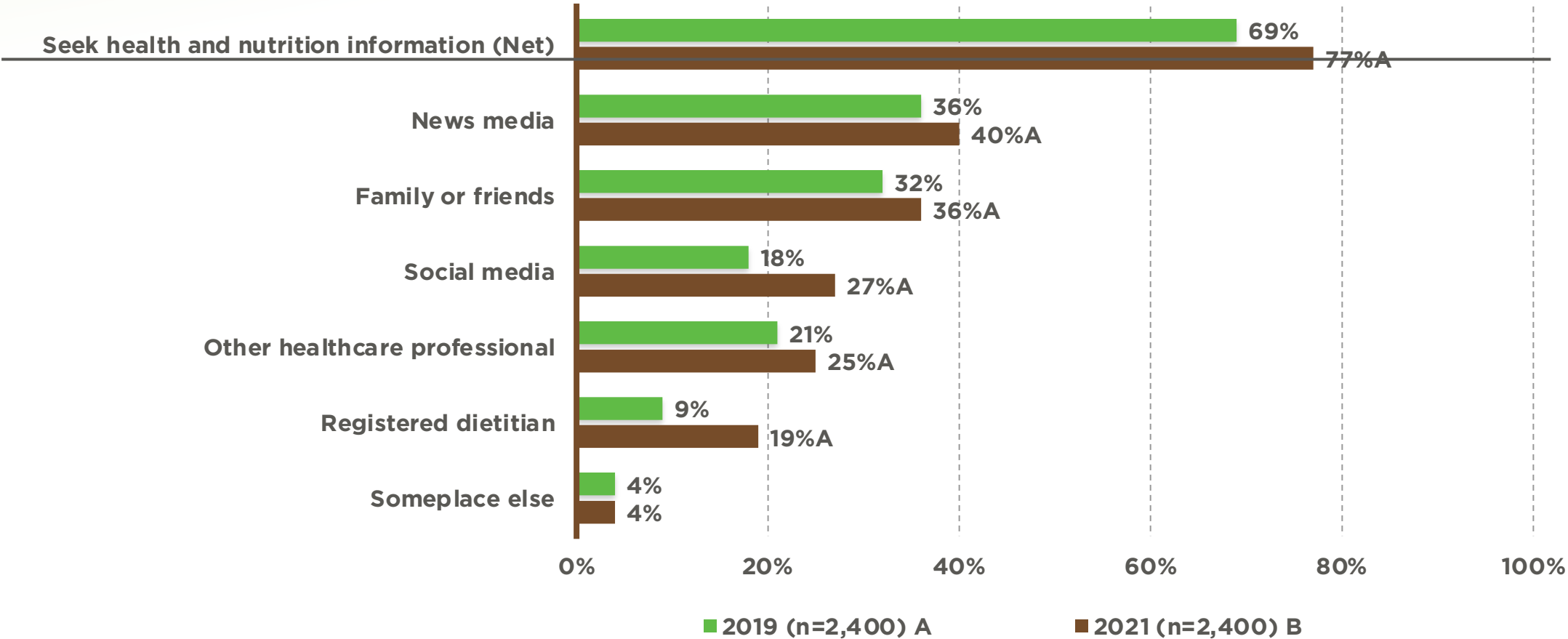
	Total Purchasers (n=1,727) %	Non-Purchasers (n=683) % A	Light (n=499) % B	Medium (n=418) % C	Heavy (n=440) % D	Super Heavy (n=3601) % E
Any of the following:	61	21	35A	59AB	77ABC	78ABC
Avocados have many uses	29	9	17A	27AB	38ABC	39ABC
Avocados help maintain heart health and/or help manage high cholesterol	28	9	18A	28AB	32ABc	38ABCd
Avocados provide a healthy mealtime or snack option with documented nutritional benefits	28	8	17A	26AB	35ABC	39ABC
Avocados help boost immunity	25	10	13a	22AB	33ABC	37ABC
Avocados help lose weight	21	7	10A	21AB	27ABC	31ABCd
Avocados help manage Diabetes, Pre-Diabetes or Gestational Diabetes	20	6	8a	15AB	27ABC	33ABCD
Avocados are sustainably grown and processed	19	5	8a	15AB	31ABC	27ABC
Avocados provide good nutrition during pregnancy, while trying to get pregnant or for newborns up to 24 months old	18	4	8A	14AB	24ABC	31ABCD

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 REMAIN THE TOP SOURCES OF HEALTH AND NUTRITION INFORMATION. HOWEVER, THERE HAVE BEEN INCREASES ACROSS THE BOARD.



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=1,727) %	Non-Purchasers (n=683) % A	Light (n=499) % B	Medium (n=418) % C	Heavy (n=440) % D	Super Heavy (n=360) % E
Seek health and nutrition information (Net)	83	61	74A	84AB	87AB	90ABC
News media	45	26	38A	44Ab	50ABc	53ABC
Family or friends	41	24	34A	40AB	43AB	47ABc
Social media	33	11	17A	32AB	43ABC	44ABC
Other healthcare professional	25	24	23	22	28abC	30ABC
Registered dietitian	23	8	13A	18AB	30ABC	35ABCd
Someplace else	4	5dE	6DE	6DE	3e	1

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

# STATEMENTS ABOUT AVOCADO 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 (n=454) % A	Other Healthcare Professional (n=600) % B	Social Media (n=644) % C	News Media (n=957) % D	Family or Friends (n=862) % E	Someplace Else (n=103) % F
Any of the following:	85BDEF	55F	85BDEF	63BF	66BdF	19
Avocados have many uses	43BDEF	29F	42BDEF	33bF	34BF	10
Avocados help maintain heart health and/or help manage high cholesterol	40BDEF	32F	41BDEF	33F	33F	10
Avocados provide a healthy mealtime or snack option with documented nutritional benefits	43BDEF	31F	41BDEF	35BEF	32F	12
Avocados help boost immunity	43BDEF	25F	42BDEF	28BF	33BDF	6
Avocados help lose weight	33BDEF	21F	35BDEF	24bF	28BDF	4
Avocados help manage Diabetes, Pre-Diabetes or Gestational Diabetes	38BCDEF	22F	34BDEF	24F	25bF	1
Avocados are sustainably grown and processed	33BDEF	22F	32BDEF	23F	24bF	1
Avocados provide good nutrition during pregnancy, while trying to get pregnant or for newborns up to 24 months old	34BCDEF	17F	30BDEF	23BF	23BF	2

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?

Conclusions	Action Step
Household penetration for avocado purchasing has increased and even light and medium purchasers are buying more avocados than before. While this may be a result of Covid, HAB needs to figure out how to maintain these gains – especially as out of home dining swings back to pre-Covid levels.	
Heavy and super purchasers have larger households and are more likely to include children. They are financially comfortable. HAB should consider these household differences when targeting media and messaging.	
We have always assumed that heavy and super purchasers were primarily regular/frequent avocado purchasers. It turns out that a sizeable portion of them are primarily special occasion purchasers. Different strategies may be needed to address this difference in purchase pattern.	
Again, possibly Covid related, there is heightened importance across most health and nutritional benefits of fresh fruits and vegetables. While avocados saw improved scores on delivery of many of these benefits, there is room for improvement.	
Concerns about pesticides, while at the low end of major barriers to purchasing avocados, has moved up to being a major barrier. Right now, this is driven by non-purchasers. This is something the HAB Sustainability Center must watch and be prepared to address.	
Awareness of “Love One Today” continues to grow and related messaging is being communicated. This program should continue but adopt to relevant messaging as needed.	

fresh **avocados**  
**LOVE**  
**ONE TODAY®**  
nutrient-dense • heart-healthy

**THANK YOU**