

Avocados Consumer Tracking 2022: Segment Report

Prepared By:

o o ● o
cooper roberts research

Table of Contents

3	Introduction	40	Avocado Usage
6	Executive Summary	49	Avocado Purchase Drivers and Barriers
14	Purchaser Segment Snapshots	83	Heavy/Super Heavy Purchaser Deep Dive
20	Avocado Purchaser Segments	87	Sustainability
26	Profile of Purchaser Segments	93	Communications
		105	Conclusions and Action Steps

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 in 2019. 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) four 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:

- 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.

How Many and When:

2,400 surveys completed per wave

2018: July 6th – 17th, 2018

2019: May 8th – 22nd, 2019

2021: May 26th – Jun 9th, 2021

2022: March 23rd – April 10th, 2022

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 2021, there were some changes:

The proportion of households purchasing avocados continues to increase (64% in 2019 to 72% in 2021 to 76% in 2022).

The use of avocados for lunch and breakfast are both down from 2021. These decreases are driven by Heavy and Super purchasers.

Agreement with many of the reasons for purchasing avocados is up.

The importance of supporting the immune system, fits into a heart-healthy diet, and fits into my weight-loss diet continues to grow among avocado purchasers.

Pesticide concerns, which had moved into being a major barrier to purchasing avocados, has dropped back to being a moderate barrier. Many of the barriers where we saw increases in 2021 among Heavy and Super Heavy purchasers, are down this year.

Awareness of “love one today” is down among heavy and super heavy purchasers.

While the news media and family and friends remain the top sources of health and nutrition information, social media is climbing as a source of this information.

Purchaser Segments

The proportion of avocado purchasers has increased over the years. The growth has been particularly strong for 2021-2022. Likely Covid related, there continues to be 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, 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.

Avocado Usage

Dinner remains the most common meal occasion for using avocados. Usage for lunch and breakfast are both down this year – driven by heavy and super heavy purchasers.

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.

Purchase Drivers

Perceptions of being healthy, containing good fat and generally liking the taste and texture of avocados are top purchase drivers. Agreement with all these reasons for purchasing avocados has increased since 2019.

- Non-purchasers do not have strong agreement with any of the reasons for purchasing avocados, although believing they are healthy and contain “good” fat are the top potentials 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 a source of many important nutrients and being nutrient dense continue to dominate. This is true for all purchaser segments.

- As avocado purchase levels increase, so does the number of very important attributes. In fact, they are all very important for heavy and super heavy purchasers.

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, being a source of many important nutrients, and fits into a heart-healthy diet. This is an improvement for heart-healthy diet – driven by light and medium purchasers (already strong for heavy and super purchasers).
- Avocados had traditionally fallen somewhat short the high importance attributes of helping to manage blood pressure and improving gut health, but this year, these scores are at minimally acceptable levels.
- Perceptions of avocados against these purchase drivers varies by user segment:
 - Avocados fall below minimally acceptable norms among non-purchasers for all attributes except being a source of many important nutrients.
 - Scores are mostly acceptable among light purchasers, but somewhat low for cognitive health.
 - Once you are a medium user, avocados perform well and continue to see better scores as usage increases.

Barriers to Avocado Purchase

Frequently being too expensive is the top barrier to purchasing avocados. Turning brown too quickly when partially used and being too perishable are strong secondary and tertiary barrier. Good news – there are only 6 major barriers, compared to 10 last year. This includes concerns about pesticides, which moved into a major barrier, moving back to being a moderate barrier.

Communication

29% of all respondents claim to have seen “Love One Today” within the past year. This remains significantly higher than the 18% seen in 2019. However, awareness is down from 2021 among both heavy and super heavy purchasers.

- This ranges from a low of 10% among non-purchasers to a high of 49% among heavy purchasers.
- Message communication associated with the logo has stayed fairly consistent over time.
 - Messages communicated generally increase as avocado purchase levels increase.

Messages about the many uses for avocados, heart health, a healthy mealtime or snack option and boosting immunity are most commonly recalled. The recall of messaging around at least one of these benefits has increased since 2021.

The news media and family and friends are the top sources of health and nutrition information. Social media is climbing as a source of this information.

Purchaser Segment Snapshots

Non-Purchasers: 24% of General Sample

The non-purchaser profile is almost identical to 2021.

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 light purchaser profile is similar to 2021. A few changes are highlighted in red.

They 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 five (up from three last year) reasons fall above typically acceptable minimums: being healthy, contain “good” fats, like the taste, **like the texture, and gives me a break from everyday food.**

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, not being at the desired ripeness level, **and not knowing how to select ripeness level.**

Along with non-purchasers, light purchasers skew older, are less likely to have children at home, have smaller households, and are less likely to be employed. They have the second lowest household income.

Medium Purchasers: 18% of General Sample

The medium purchaser profile is similar to 2021. The only change is highlighted in red.

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 the strongest segment for dinner usage.** 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: 22% of General Sample

The heavy purchaser profile is similar to 2021. A few changes are highlighted in red.

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. **There has been a decrease in the proportion using avocados for lunch and breakfast.** They are more adventurous than light and medium purchasers but fall below super heavy purchasers in terms of the different ways they frequently use avocados.

Along with super heavy purchasers, they feel strongly about many of the reasons for purchasing avocados. **They now surpass super heavy purchasers for liking the texture.**

They agree that all of the health and nutrition attributes are important.

- Avocados perform well against the most important attributes for this segment, but not quite as well as seen among super heavy purchasers.

Top barriers to purchasing avocados are being too expensive and turning brown too quickly. **Previous major barriers of being perishable, inconsistent quality and not being at the desired ripeness level are now only moderate barriers.**

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 just behind super heavy purchasers for the highest household income. **They no longer have a geographic skew to the west.**

Super Heavy Purchasers: 15% of General Sample

The super heavy purchaser profile is similar to 2021. A few changes are highlighted in red.

They are mostly a mixture of special occasion and regular avocado purchasers but are skewing more to regular purchasers.

They use avocados for more meal occasions than seen across all other segments (but heavy purchasers are not too far behind them). **There has been a decrease in their use of avocados for lunch and breakfast.** They frequently 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 (but tied with heavy purchasers for many attributes).

- Avocados perform well against all of the most important attributes for this segment.

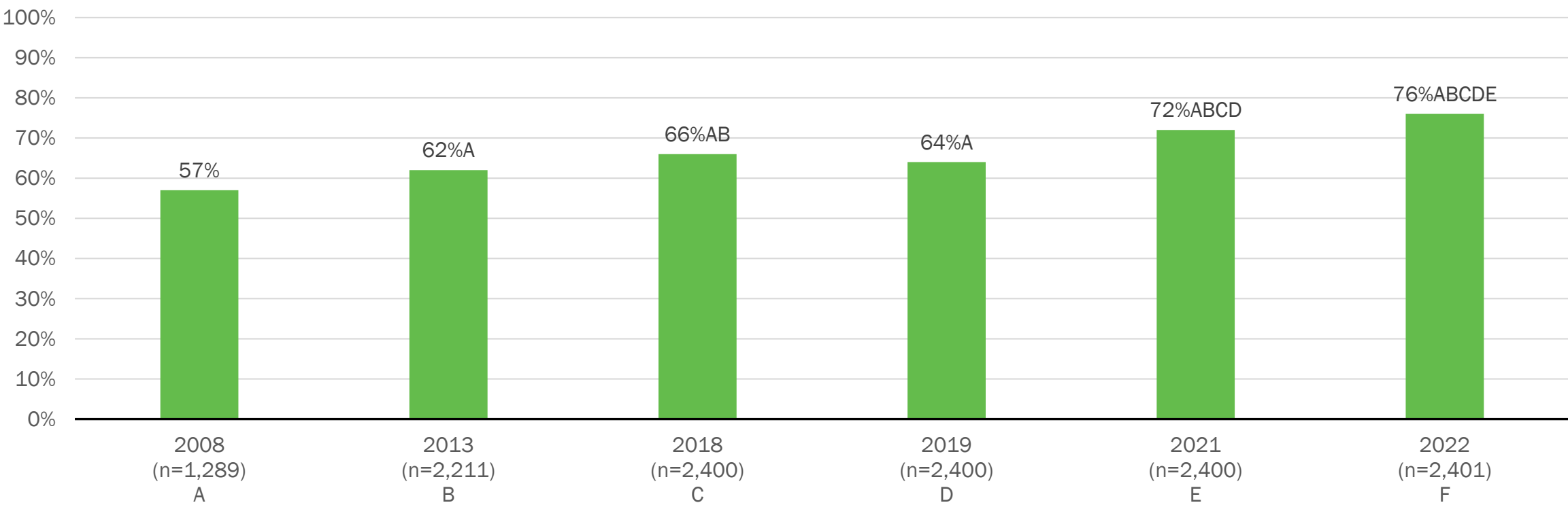
The top barrier to purchasing avocados are being too expensive. **Previous major barriers of turning brown too quickly, being perishable and not desired ripeness level are now only moderate barriers.**

Super heavy purchasers have a strong skew toward ages 25-44. Along with heavy purchasers, they have a slight Hispanic skew. 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 and they have highest household income. 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.

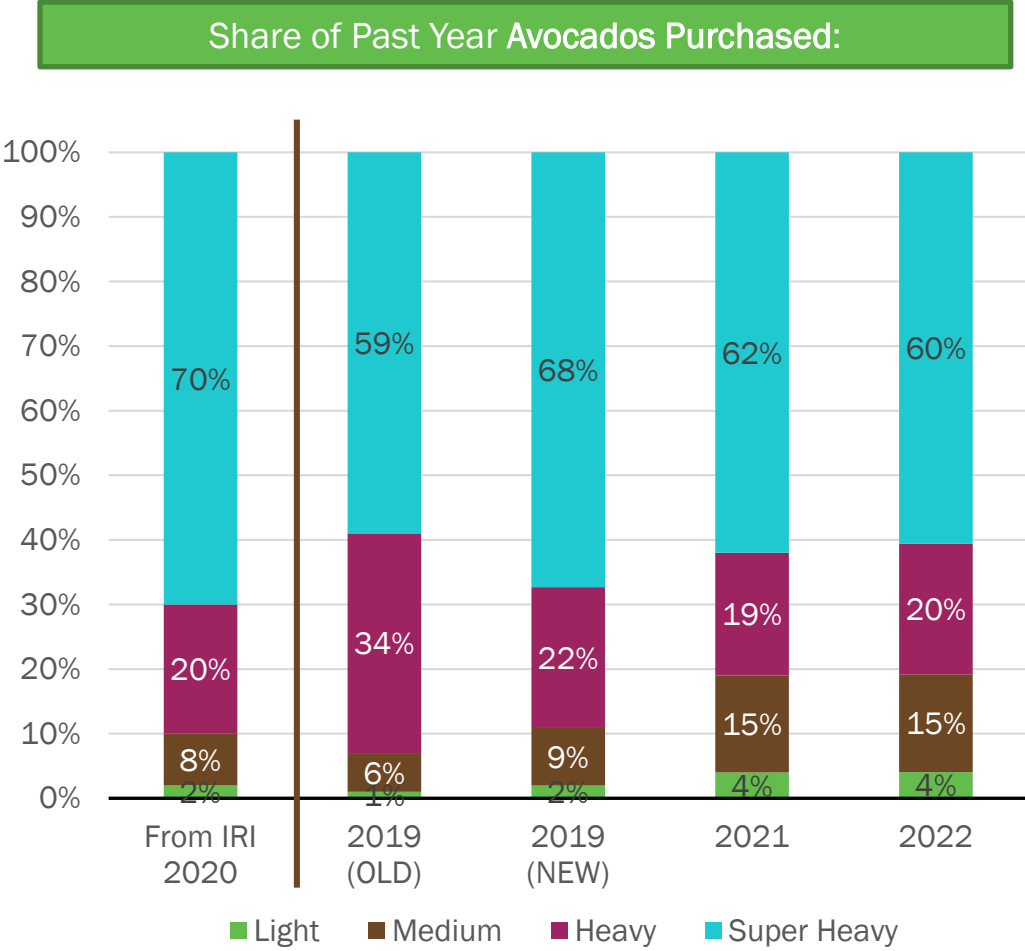


NOTE: earlier years reported in 5 year increments for ease in reading the chart

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. The 2021 adjustments were used for 2022.



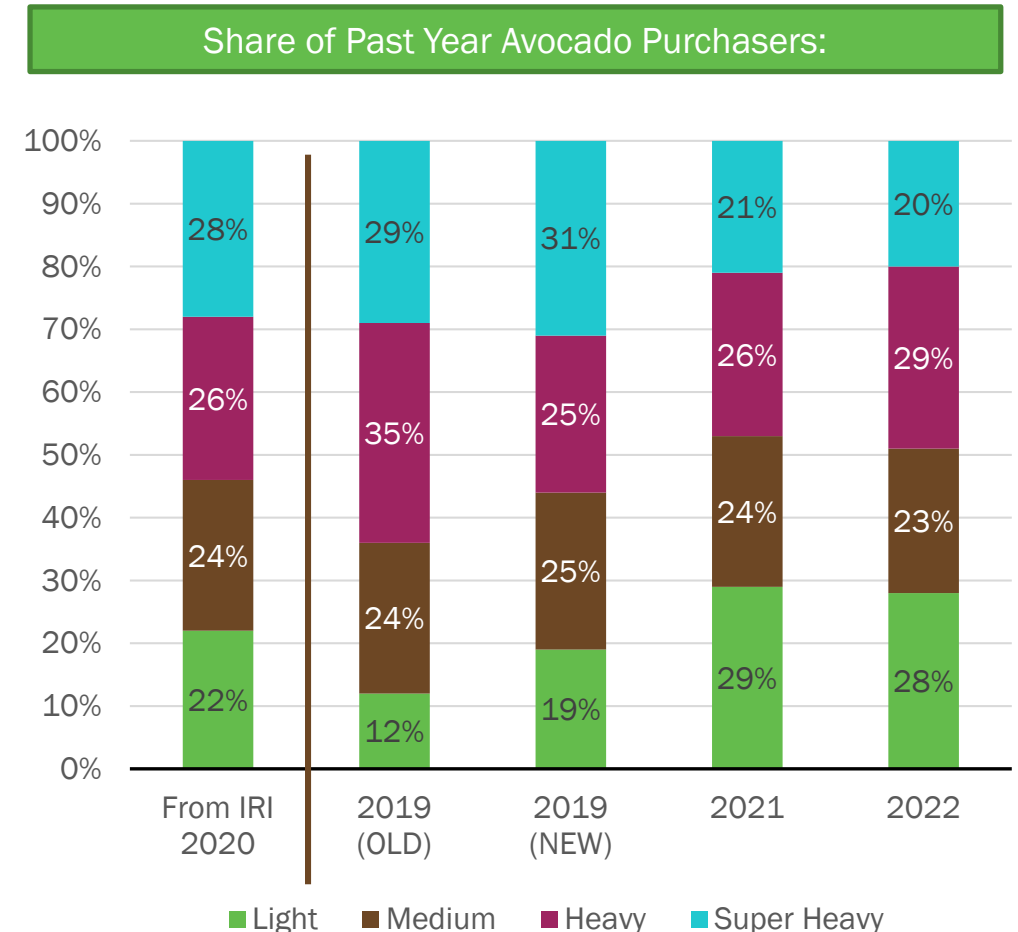
Q120 – Over the course of a year, how often do you buy avocados to eat or serve at home?
Q130 - On average, how many avocados do you usually buy at one time?

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).

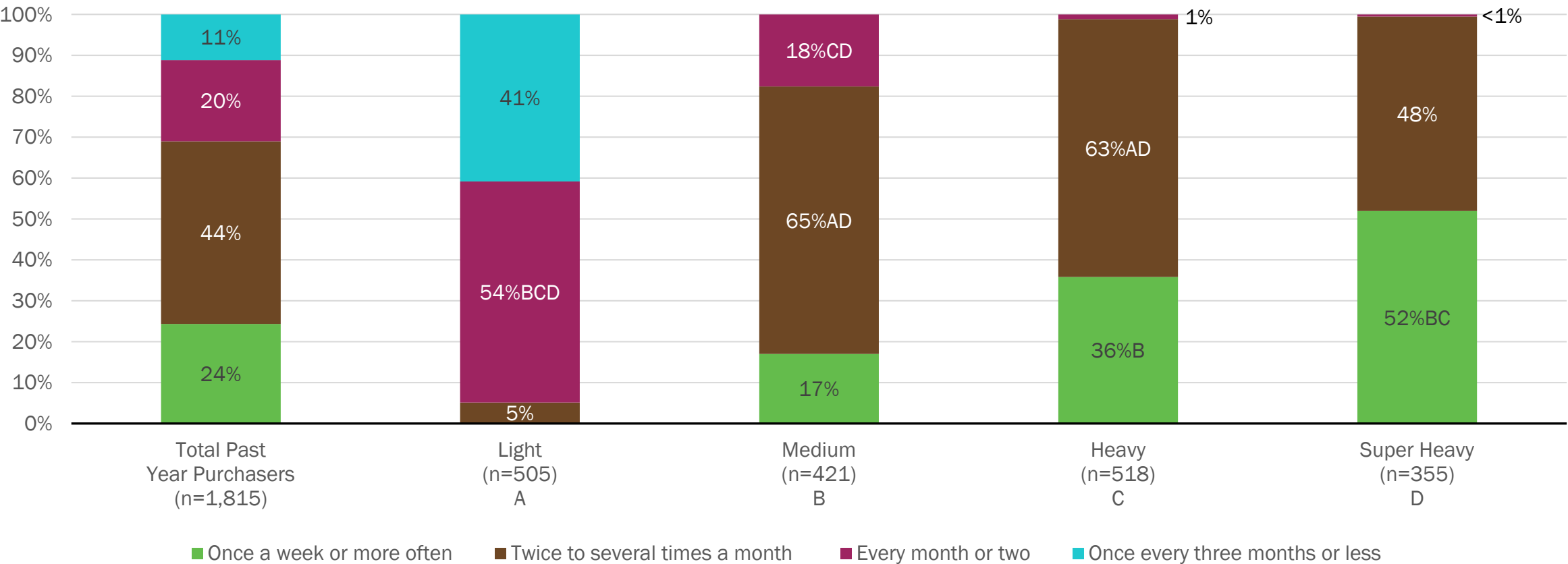
The revised 2019 shares are very similar to IRI.

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.



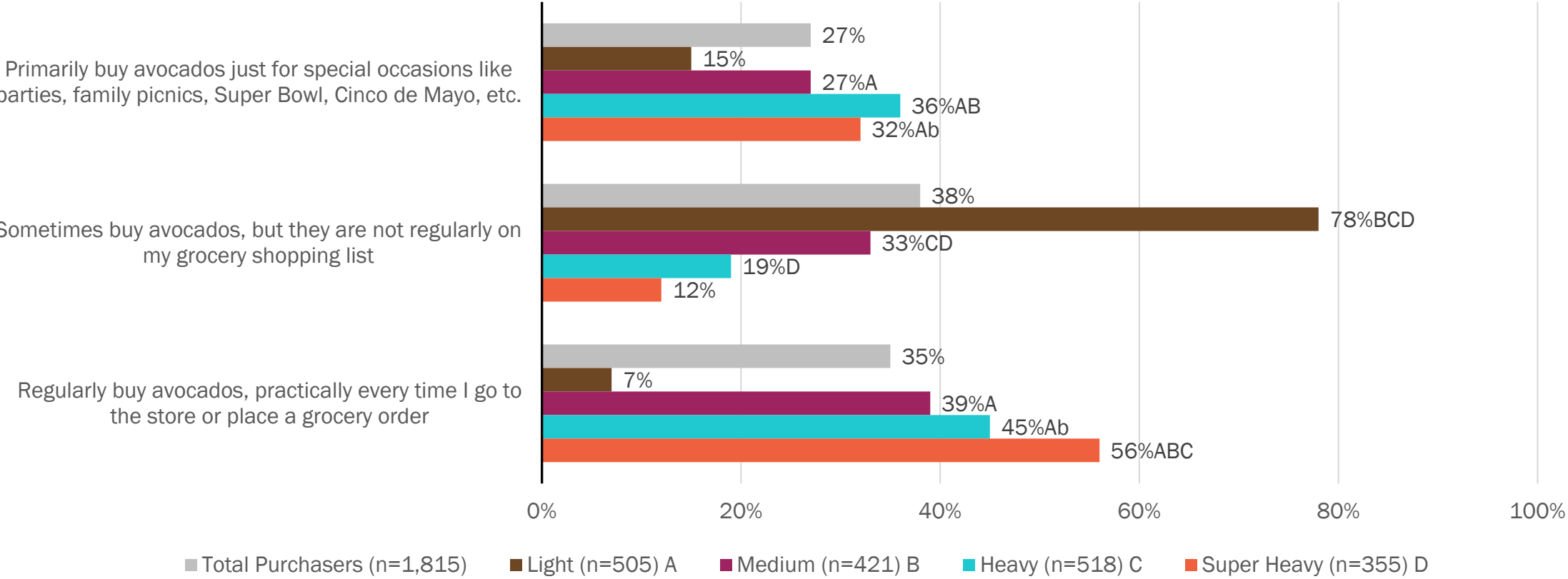
Frequency Of Buying Avocados To Eat Or Serve At Home

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.



Avocado Purchase Pattern

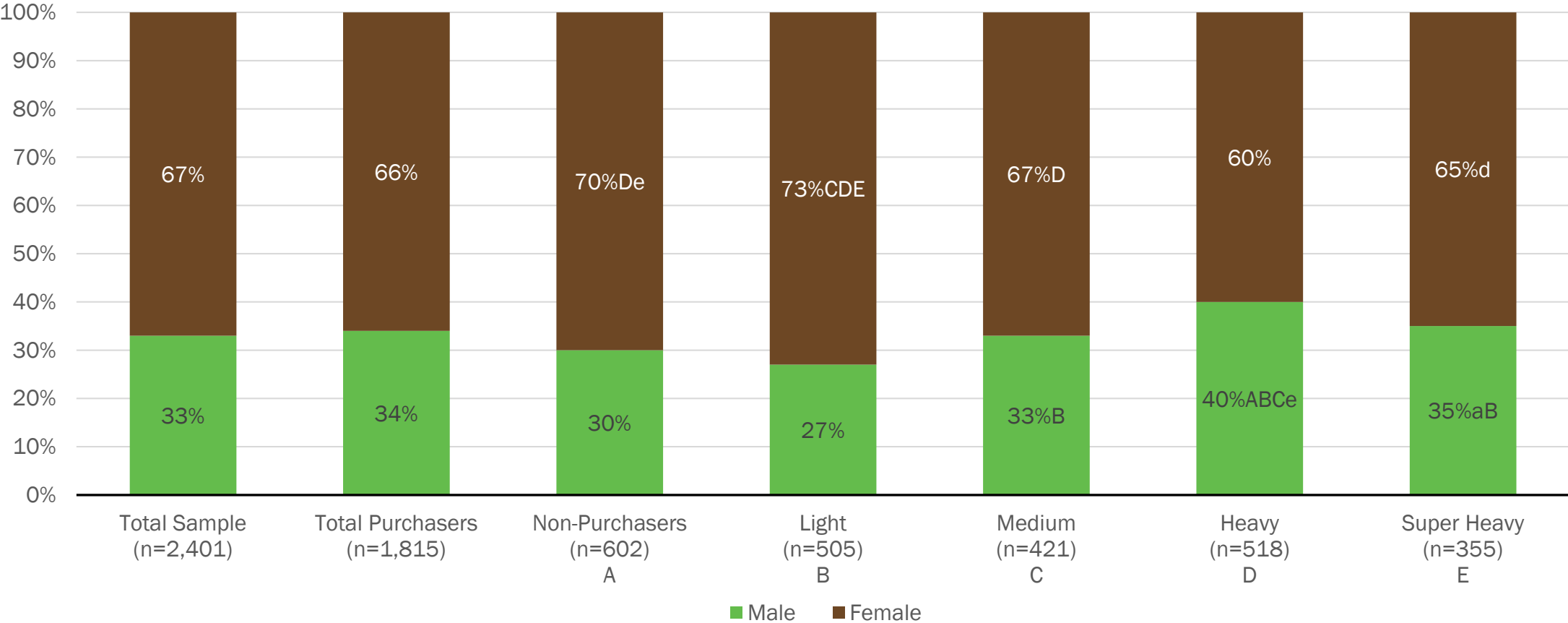
A large portion of avocado purchasers, including heavy and super purchasers, are primarily special occasion purchasers. Light purchasers are predominately occasional (not special occasion) purchasers



Profile of Purchaser Segments

Gender

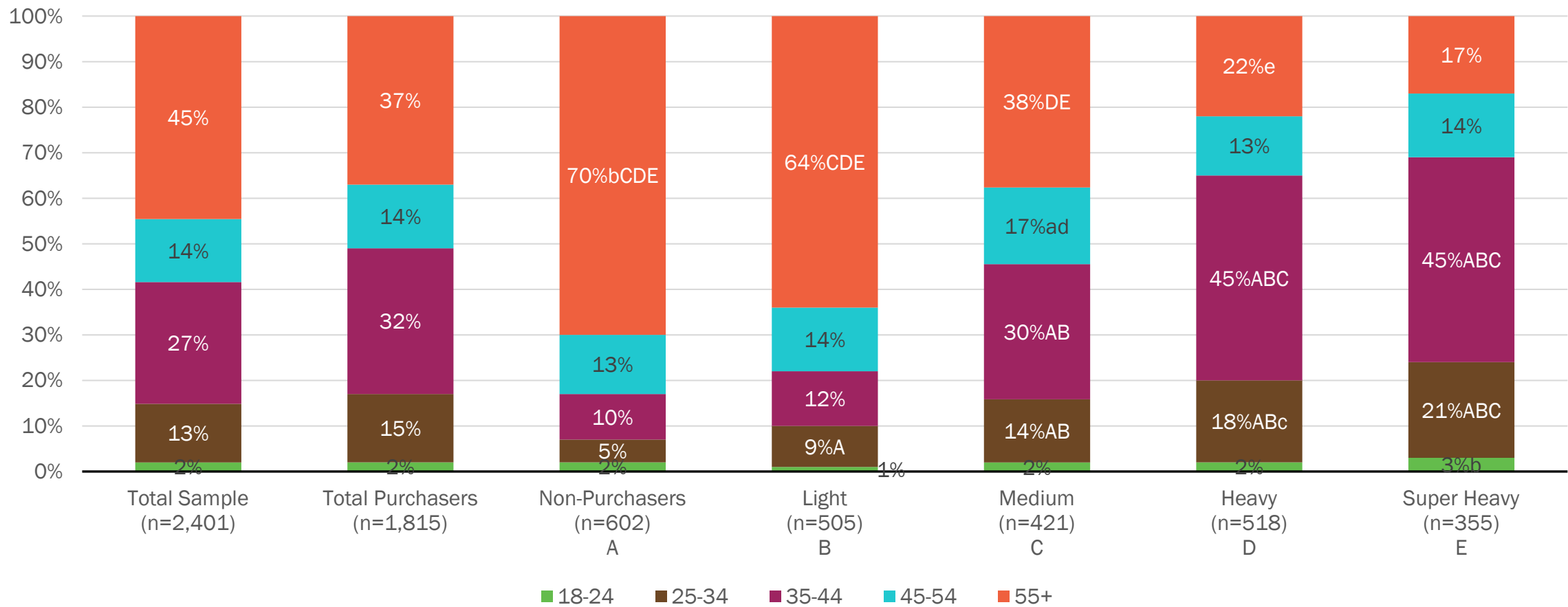
As seen last year, Heavy purchasers have somewhat of a male skew. We typically also see this for Super purchasers, but we do not this year.



Profile of Purchaser Segments

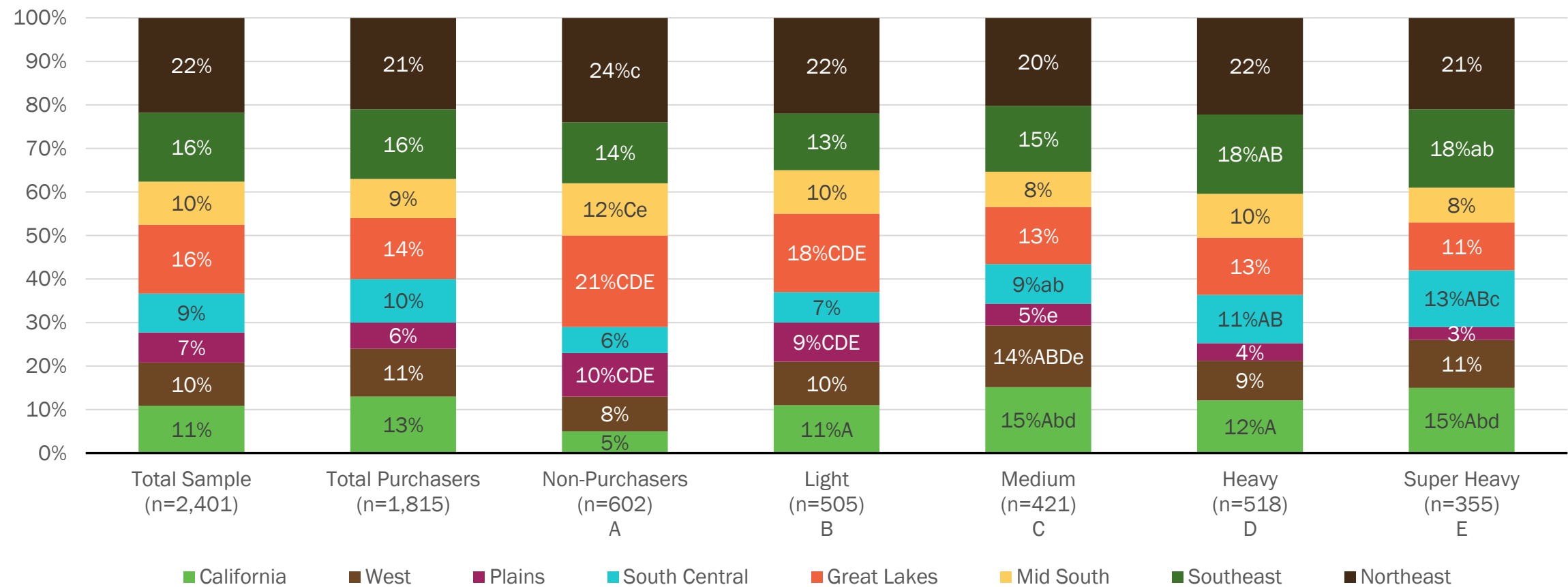
Age

There is quite a bit of variation in the age distribution across purchaser segments. As usage goes up, the proportion of purchasers age 25-44 increases.



Region of Residence

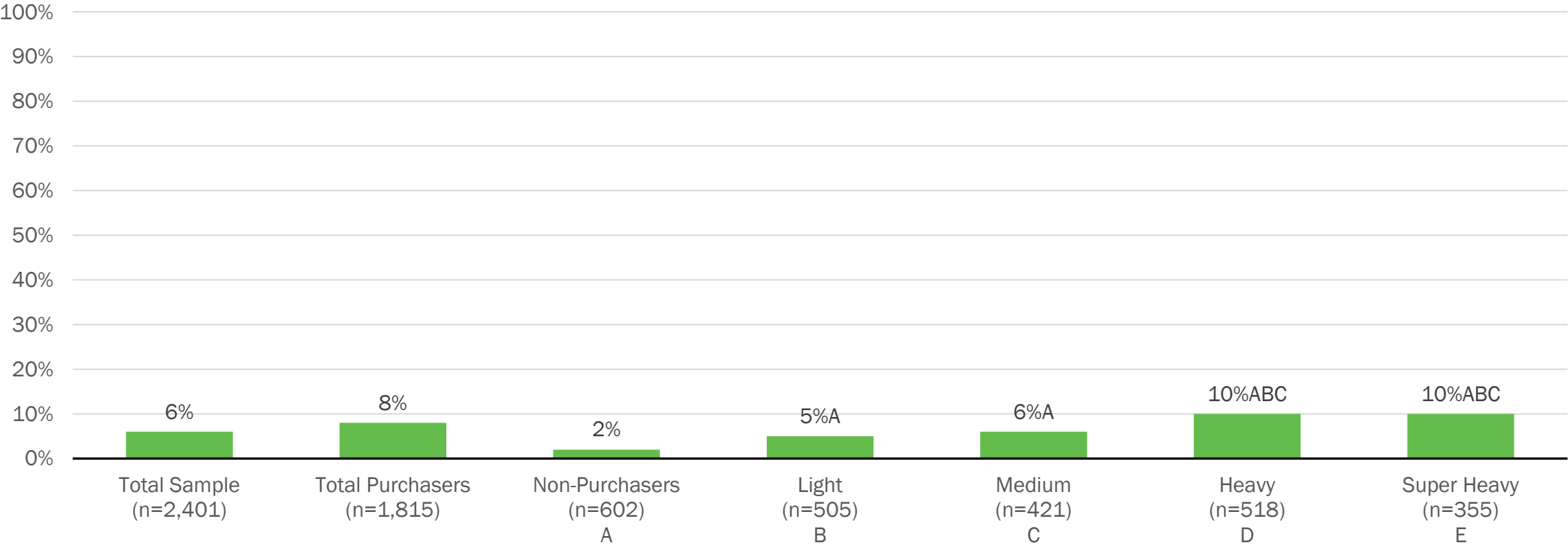
We do not see as much California or western skew with increased avocado purchase levels as we typically do.



Of Hispanic Origin

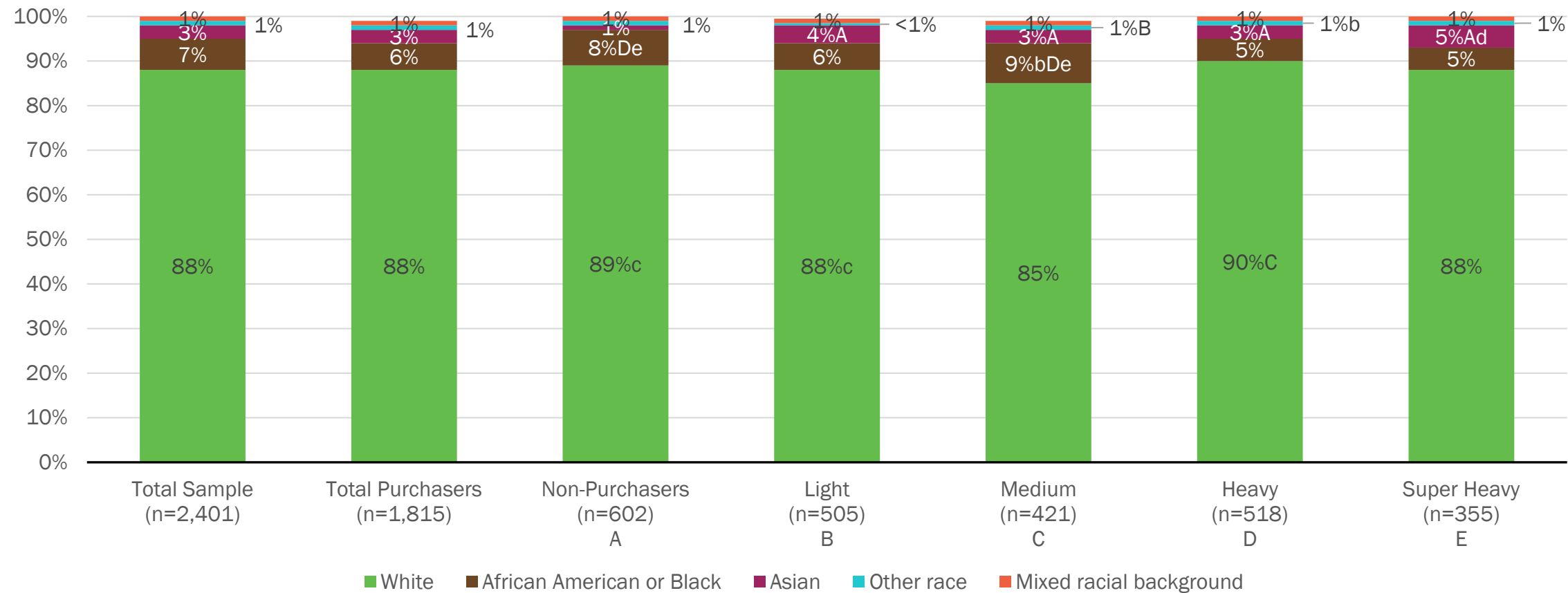
(General Survey in English Only)

As seen before, Heavy and Super Heavy purchasers skew more Hispanic (English speaking).



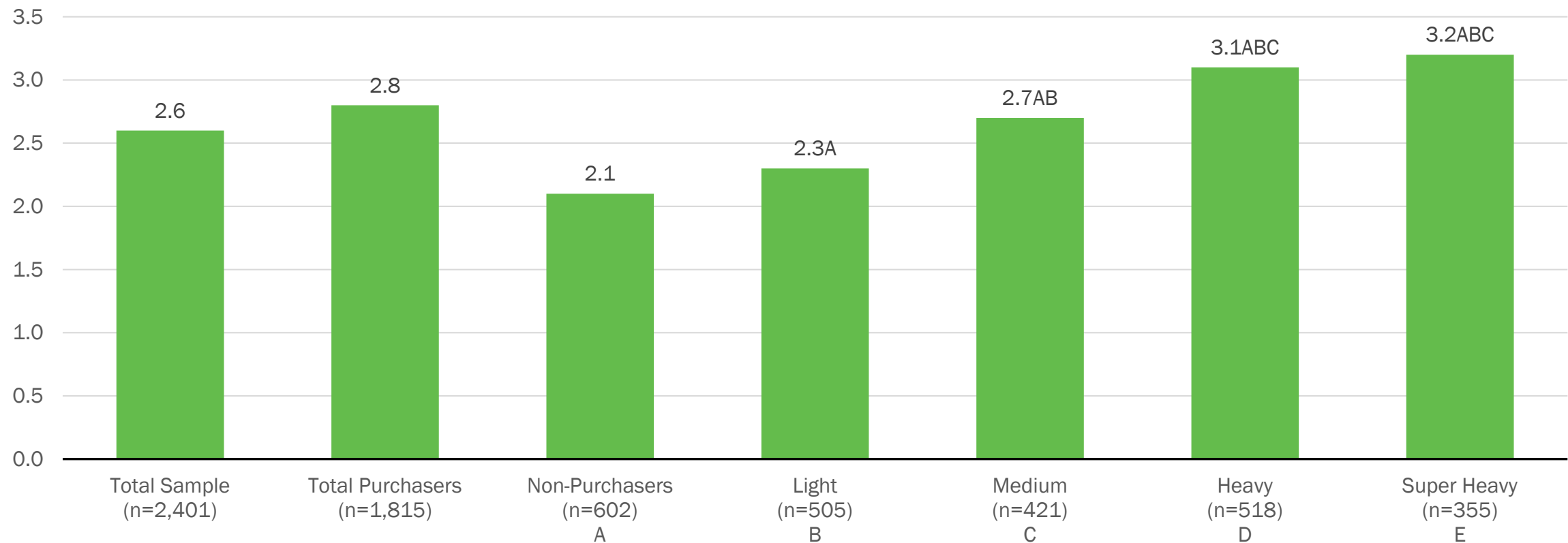
Race

We see less racial variation across purchaser segments than we have seen in the past (note: it has never been extreme).



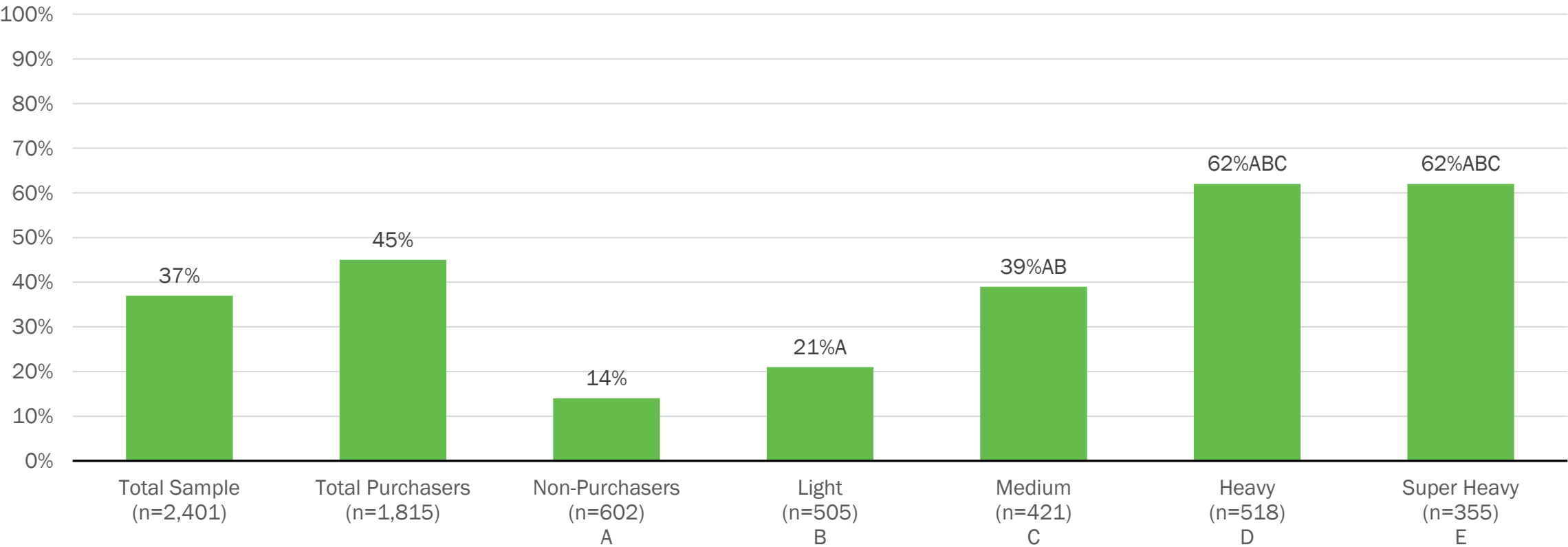
Average Number of People In Household

As seen before, household size increases as avocado consumption increases



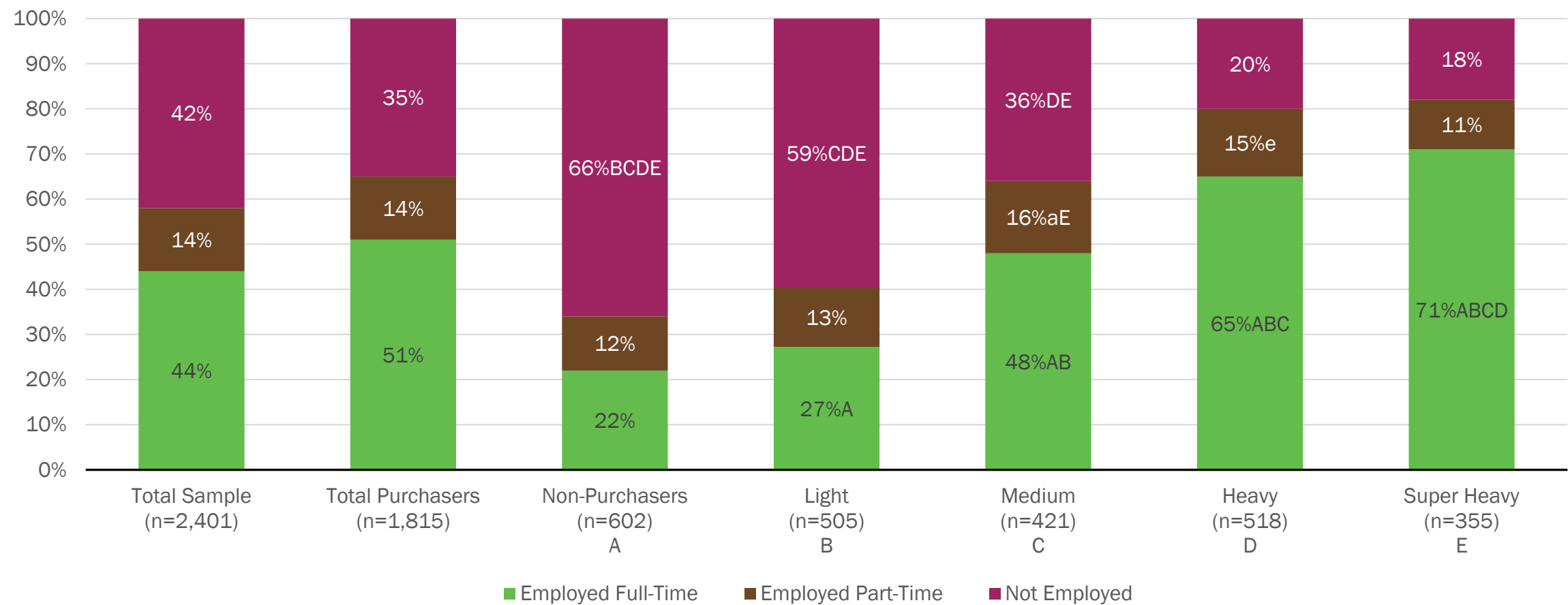
Children Under 18 Living in Household

As seen before, The presence of children in the household increases as avocado usage increases. There is no difference between Heavy and Super Heavy purchasers.



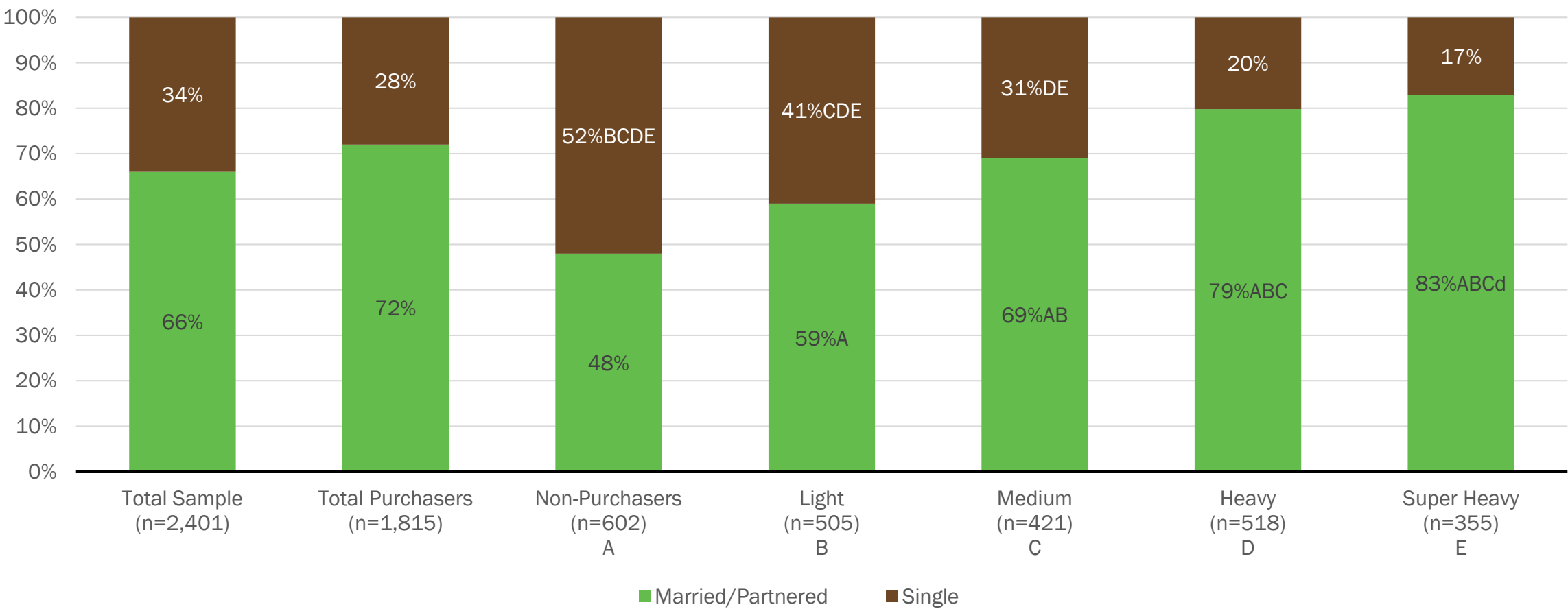
Employment Status

As seen before, The likelihood of being employed increases as avocado usage increases.



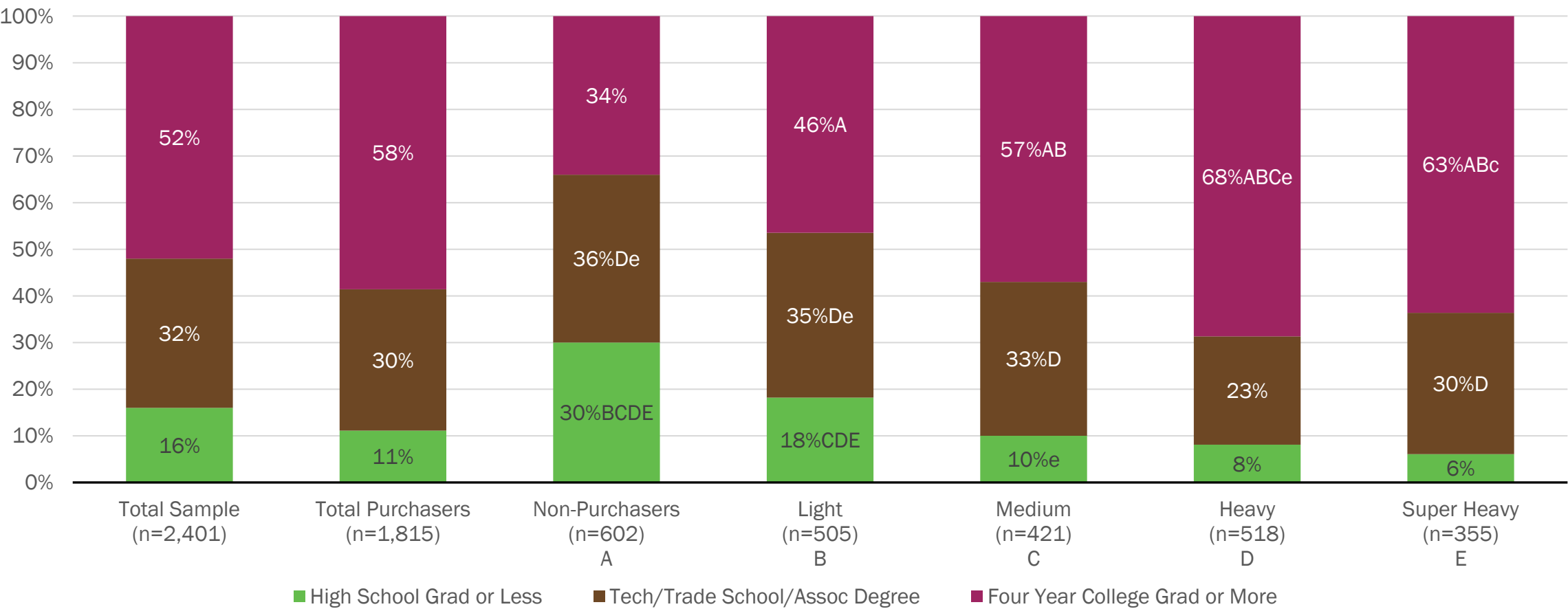
Marital Status

As seen before, The likelihood of being married/partnered increases as avocado usage increases.



Education Level

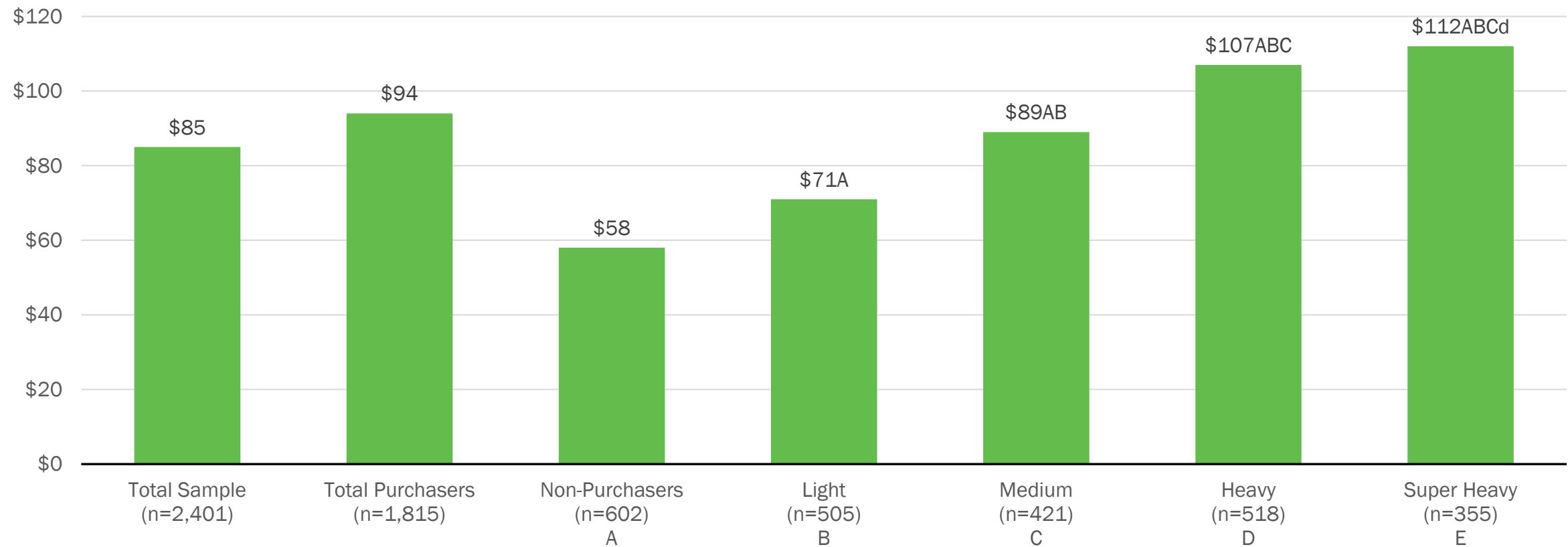
As seen before, educational level increases as avocado usage increases, with the exception of a slight dip between Heavy and Super Heavy purchasers.



Total Average Annual Household Income

(in 000's)

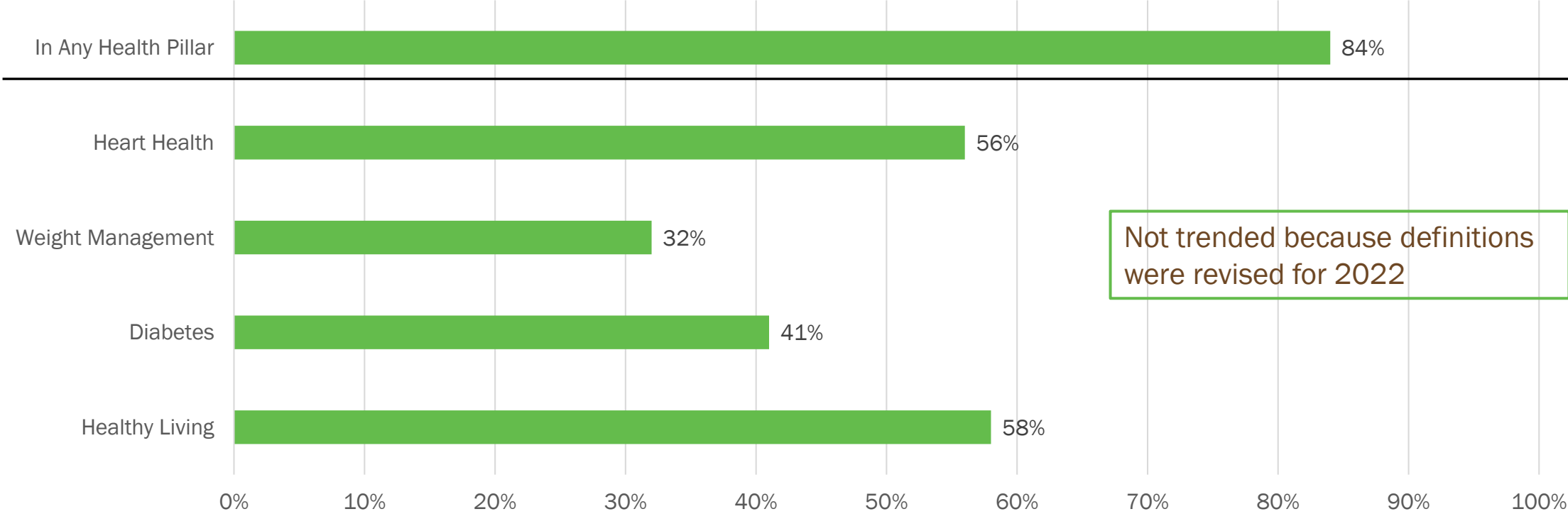
As seen before, household income increases as avocado usage increases.



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

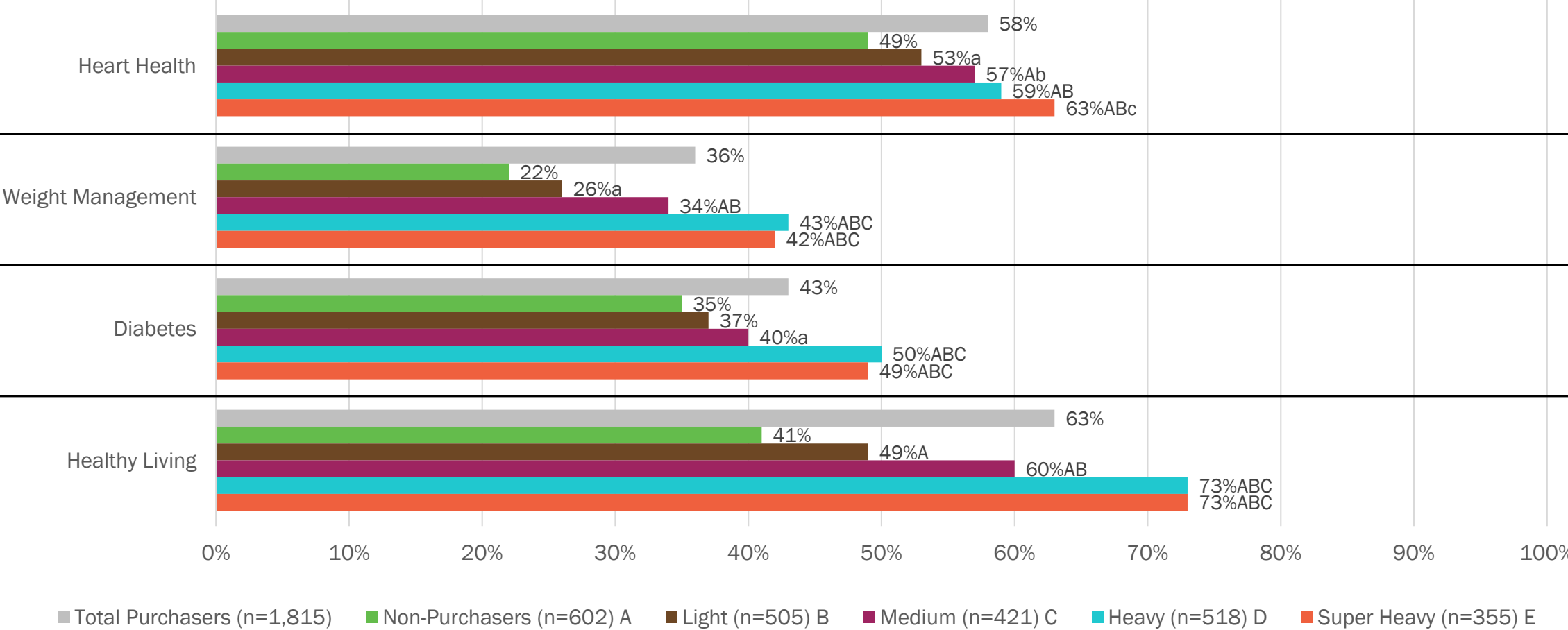
Health And Wellness Pillars (Total Sample)

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 increased avocado purchase and each of the health pillars.

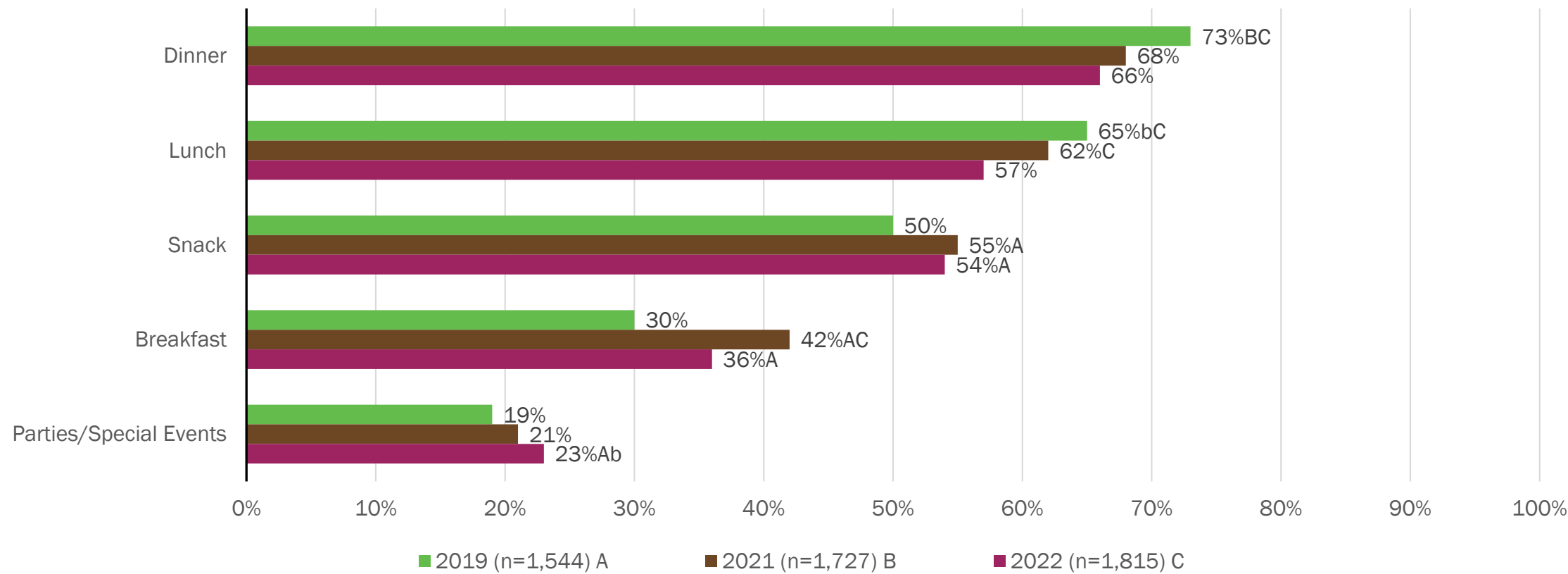


Avocado Usage

Meal Occasions Household Typically Use Avocados

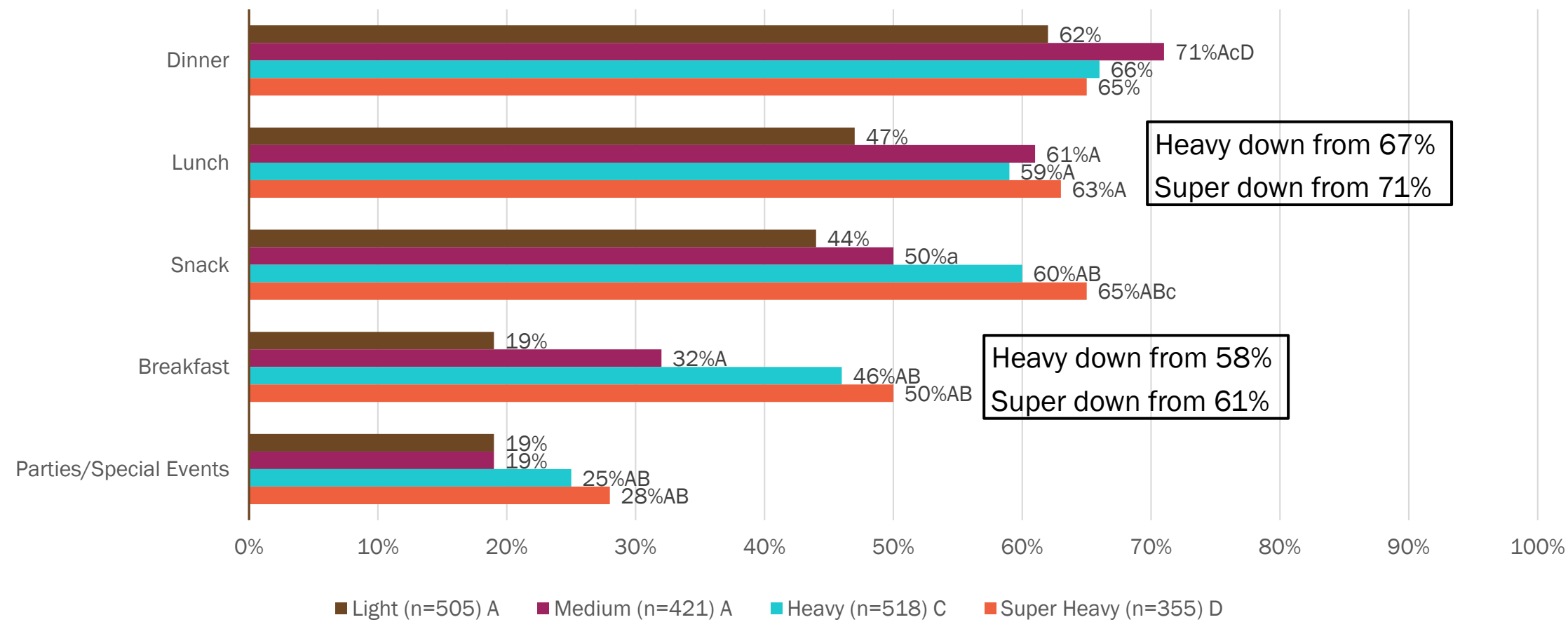
(Total Past Year Avocado Purchasers)

While avocados are used across a variety of meal occasions, dinner and lunch are most common. Lunch and breakfast are both down from 2021. These decreases are driven by Heavy and Super purchasers.



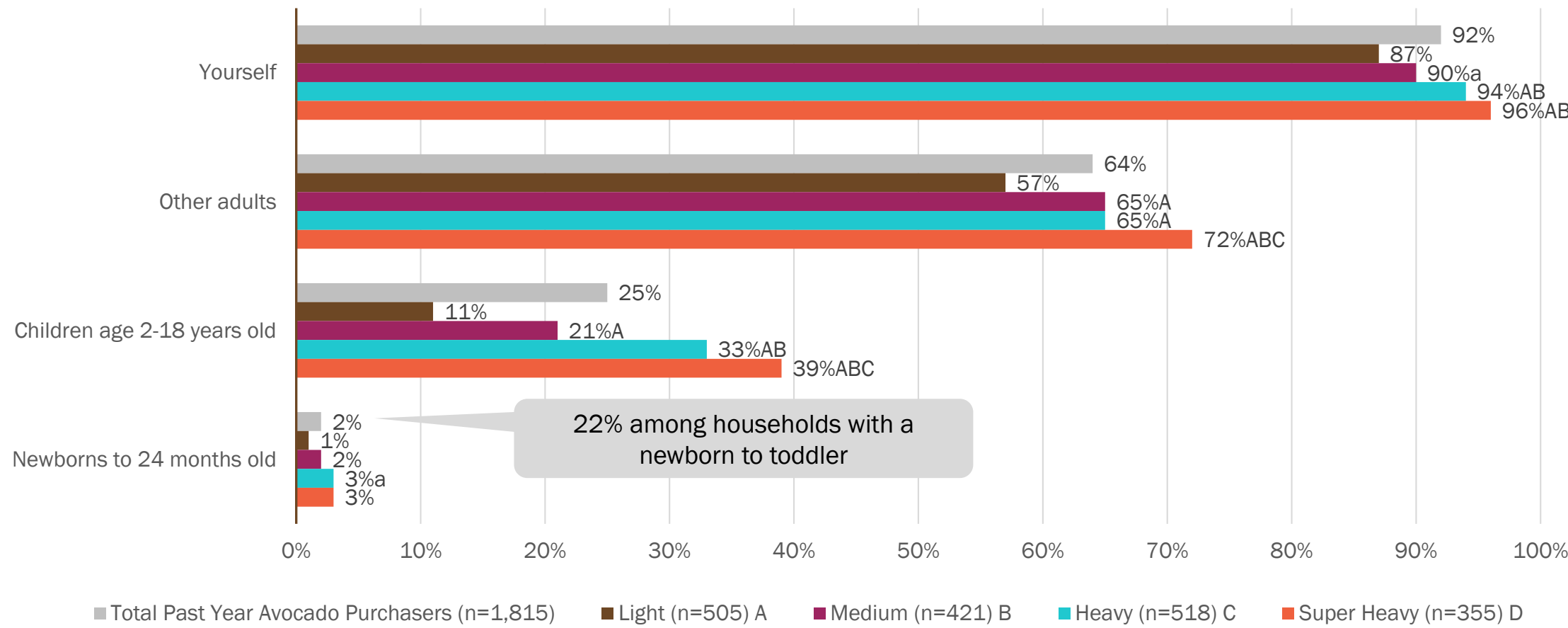
Meal Occasions Household Typically Use Avocados

Heavy and Super Heavy purchasers exceed all other segments in terms of using avocados across most of the meal occasions.



Household Members Consuming Avocados

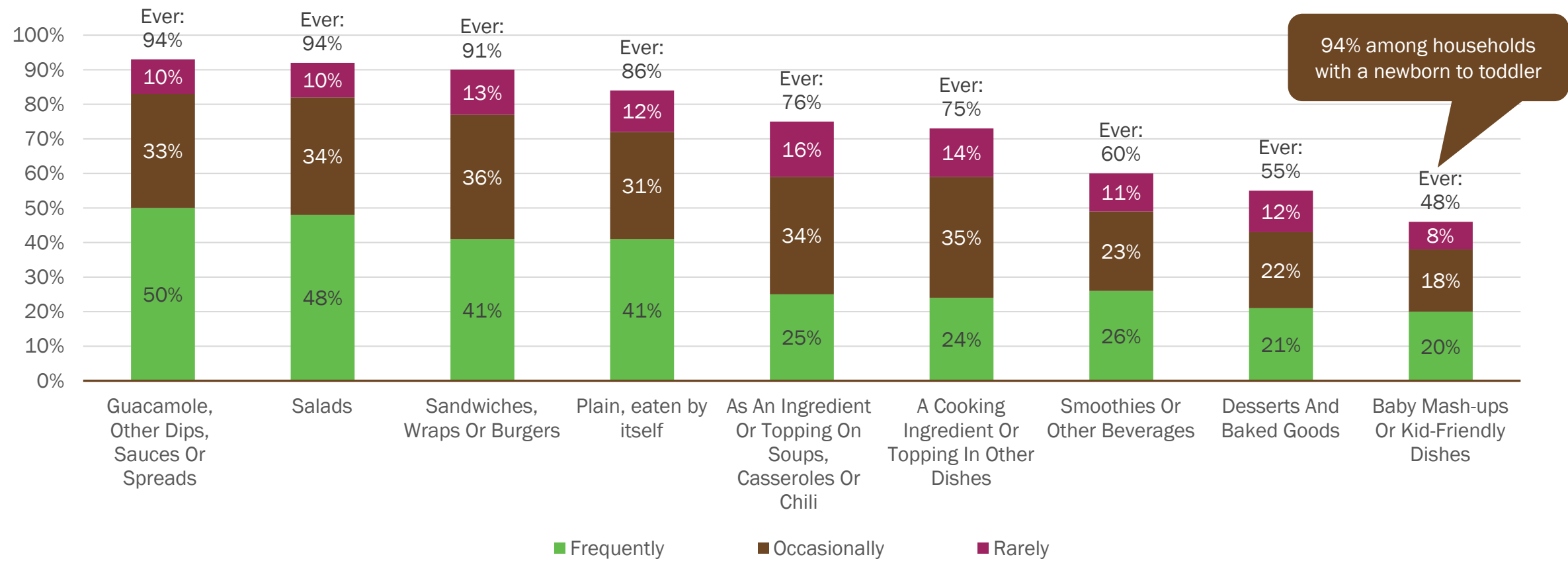
Avocado consumption is generally higher among other household members for super heavy purchasers.



How Avocados Are Consumed

(Total Past Year Avocado Purchasers)

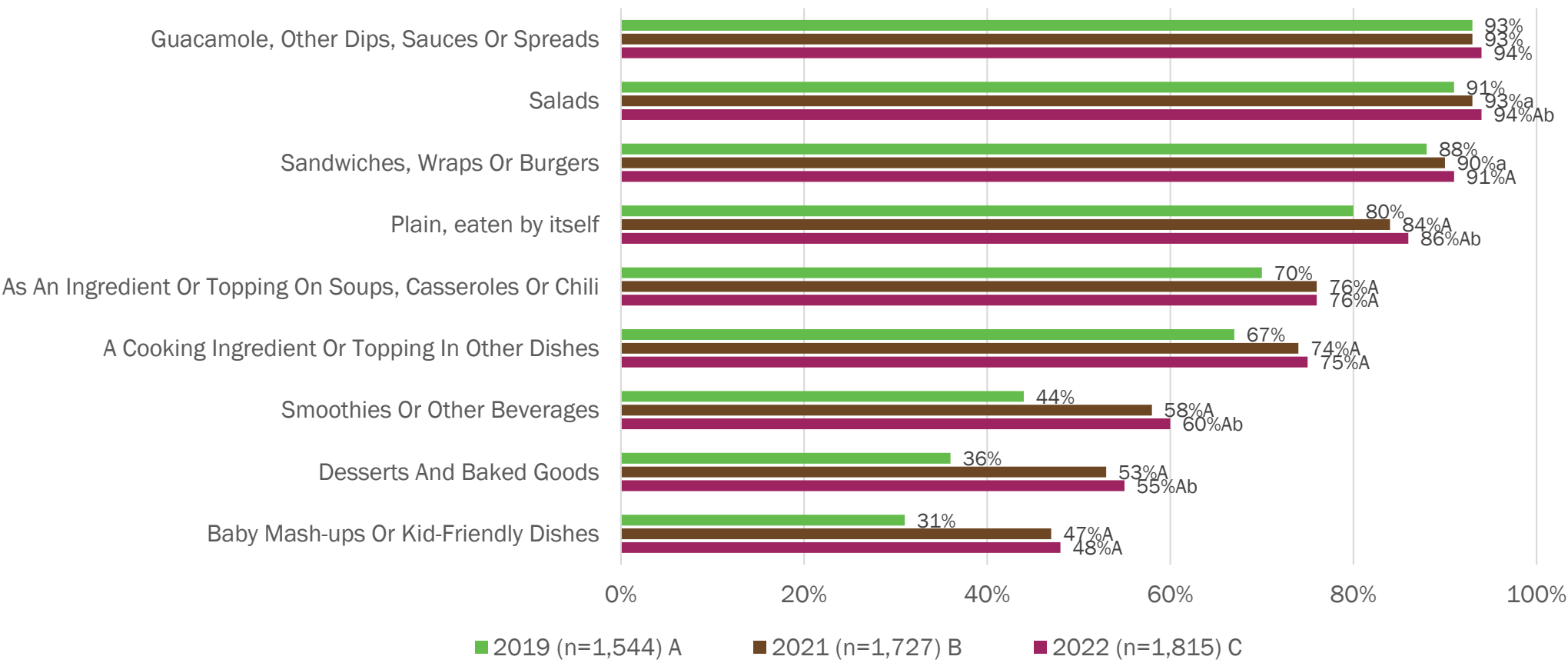
Guacamole/dips, salads and sandwiches/wraps/burgers remain the most common ways of using avocados.



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.



Ways Ever Consumed Avocados

As avocado usage goes up, the ways avocados are ever used also increases. However, there are not many differences between Heavy and Super Heavy purchasers.

	Light (n=505) % A	Medium (n=421) % B	Heavy (n=518) % C	Super Heavy (n=355) % D
In guacamole, other dips, sauces or spreads	90	95A	97Ab	97AB
In salads	85	96A	98Ab	98Ab
On sandwiches, wraps or burgers	80	95A	95A	95A
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	68	88A	94AB	96AB
As an ingredient or topping on soups, casseroles or chili	53	79A	87AB	90ABc
As a cooking ingredient or topping in dishes other than those listed above	51	80A	87AB	88AB
In smoothies or other beverages	27	60A	79AB	82AB
In desserts and baked goods, such as puddings and cakes	24	52A	74AB	78AB
In baby mash-ups or kid- friendly dishes	17	43A	67AB	72ABc

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=505) % A	Medium (n=421) % B	Heavy (n=518) % C	Super Heavy (n=355) % D
In guacamole, other dips, sauces or spreads	44	50a	52A	57Abc
In salads	30	49A	57AB	60AB
On sandwiches, wraps or burgers	25	43A	47A	53ABc
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	23	40A	50AB	57ABC
As a cooking ingredient or topping in dishes other than those listed above	10	23A	33AB	33AB
As an ingredient or topping on soups, casseroles or chili	9	24A	32AB	38ABc
In smoothies or other beverages	6	20A	38AB	44ABc
In desserts and baked goods, such as puddings and cakes	4	16A	34AB	32AB
In baby mash-ups or kid- friendly dishes	4	15A	32AB	33AB

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.

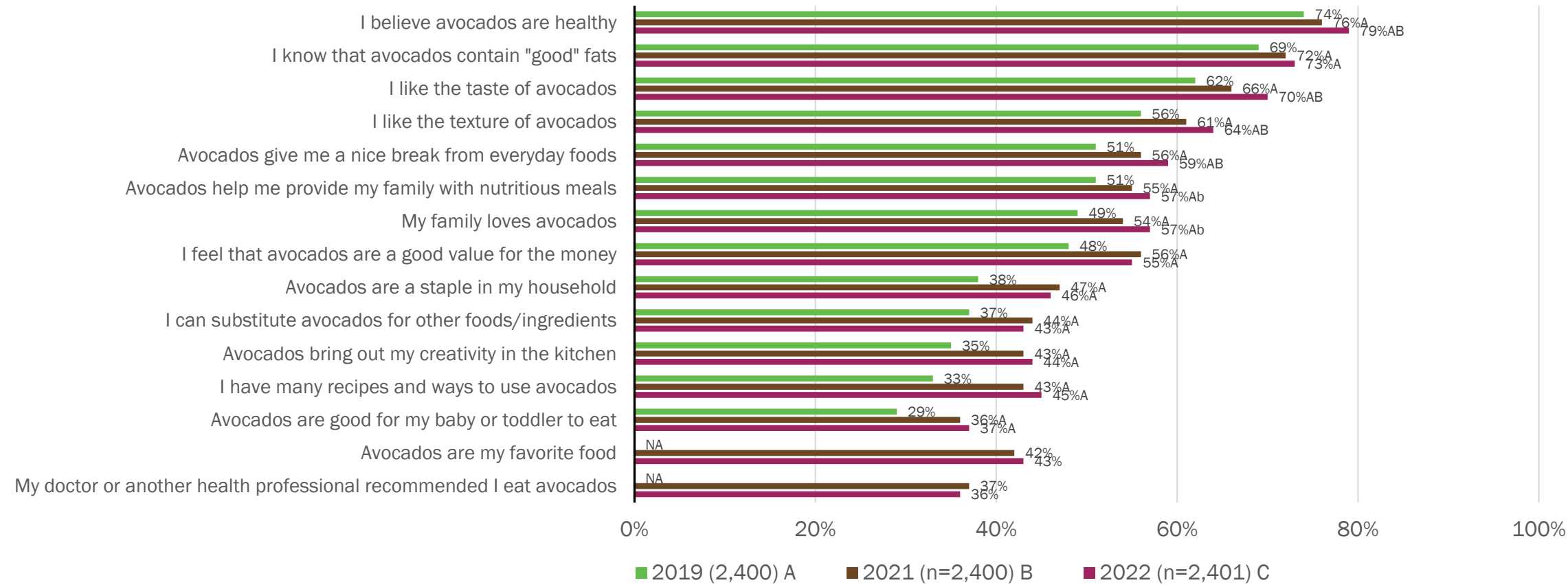
	Light (n=505) % A	Medium (n=421) % B	Heavy (n=518) % C	Super Heavy (n=355) % D
In guacamole, other dips, sauces or spreads	77	84A	87A	86A
In salads	68	87A	89A	88A
On sandwiches, wraps or burgers	62	82A	83A	85A
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	52	75A	82AB	84AB
As an ingredient or topping on soups, casseroles or chili	34	60A	71AB	75ABc
As a cooking ingredient or topping in dishes other than those listed above	33	60A	72AB	76ABc
In smoothies or other beverages	16	45A	68AB	71AB
In desserts and baked goods, such as puddings and cakes	15	38A	63AB	60AB
In baby mash-ups or kid- friendly dishes	11	33A	57AB	59AB

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 these reasons for purchasing avocados has increased since 2019.



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=1,815) %	Non-Purchasers (n=602) % A	Light (n=505) % B	Medium (n=421) % C	Heavy (n=518) % D	Super Heavy (n=355) % E
I believe avocados are healthy	87	53	85A	90ABd	87A	88Ab
I know that avocados contain "good" fats	82	48	80A	85ABE	83Abe	79A
I like the taste of avocados	85	24	76A	90ABE	92ABE	85AB
I like the texture of avocados	79	19	67A	81AB	86ABC	84AB
Avocados give me a nice break from everyday foods	73	18	61A	72AB	79ABC	81ABC
Avocados help me provide my family with nutritious meals	70	18	51A	75AB	81ABC	79AB
My family loves avocados	71	14	48A	72AB	84ABC	82ABC
I feel that avocados are a good value for the money	67	21	47A	67AB	77ABC	79ABC
Avocados are a staple in my household	59	8	20A	65AB	79ABC	79ABC
I have many recipes and ways to use avocados	56	10	24A	59AB	74ABC	73ABC
Avocados bring out my creativity in the kitchen	55	12	27A	53AB	71ABC	73ABC
I can substitute avocados for other foods/ ingredients	52	17	30A	54AB	65ABC	63ABC
Avocados are my favorite food	53	10	19A	59AB	70ABC	73ABC
Avocados are good for my baby or toddler to eat	45	11	22A	41AB	60ABC	62ABC
My doctor or another health professional recommended I eat avocados	44	10	17A	42AB	61ABC	63ABC

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

As seen in recent years the top two decision drivers when purchasing fresh produce are being a source of many important nutrients and being nutrient dense. Another 20 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=2,401)	Total Purchasers (n=1,815)	Non-Purchasers (n=602) A	Light (n=505) B	Medium (n=421) C	Heavy (n=518) D	Super Heavy (n=355) E
Are a source of many important nutrients	166	171	150	161A	171AB	177ABC	177ABC
Nutrient dense, have lot of vitamins and minerals, and nutrient booster	166	171	149	162A	171AB	177ABc	176ABc
Fits into my heart- healthy diet	159	165	139	153A	166AB	172ABC	173ABC
Supports the immune system	158	164	139	147A	164AB	173ABC	174ABC
Are a source of naturally good fats	155	164	128	150A	165AB	171ABc	172ABC
Will help maintain healthy cholesterol levels	152	159	129	144A	159AB	168ABC	169ABC
Are a source of beneficial fiber	151	158	129	140A	158AB	168ABC	169ABC
Improves digestive health	150	157	128	135a	158AB	170ABC	170ABC
Supports healthy aging	148	155	128	139A	155AB	163ABC	165ABC
Are naturally low in saturated fat	145	154	117	136A	154AB	163ABC	165ABC
Improves gut health	144	151	121	127a	152AB	165ABC	165ABC
Will help manage blood pressure	143	149	123	128	148AB	162ABC	164ABC
Will not raise 'bad' LDL cholesterol levels	142	150	119	133A	149AB	160ABC	161ABC
Supports cognitive health	142	150	119	128A	150AB	163ABC	163ABC
Are a cholesterol-free food option	140	149	113	128A	148AB	160ABC	163ABC
Good for weight- management	133	141	107	118A	138AB	153ABC	161ABCD
Helps maintain healthy skin	133	143	101	115A	145AB	159ABC	161ABC
Will help improve eyesight	130	138	105	110	138AB	154ABC	158ABC
Are a source of folate/ folic acid	125	135	93	104A	132AB	153ABC	156ABC
Are a sodium-free food option	122	132	94	103A	129AB	149ABC	153ABC
Fits into my weight-loss diet	121	130	93	104A	126AB	143ABC	153ABCD
Are a sugar-free food option	120	130	90	101A	128AB	148ABC	152ABC
Good for diabetes management	117	125	92	92	121AB	144ABC	151ABCd
Are Non-GMO	116	126	84	96A	125AB	144ABC	146ABC
Supports healthy child development	102	113	67	70	105AB	139ABC	149ABCD
Supports healthy child growth	101	112	66	69	103AB	138ABC	148ABCD
Fits into my partner's prenatal diet	83	96	46	50	89AB	122ABC	131ABCd

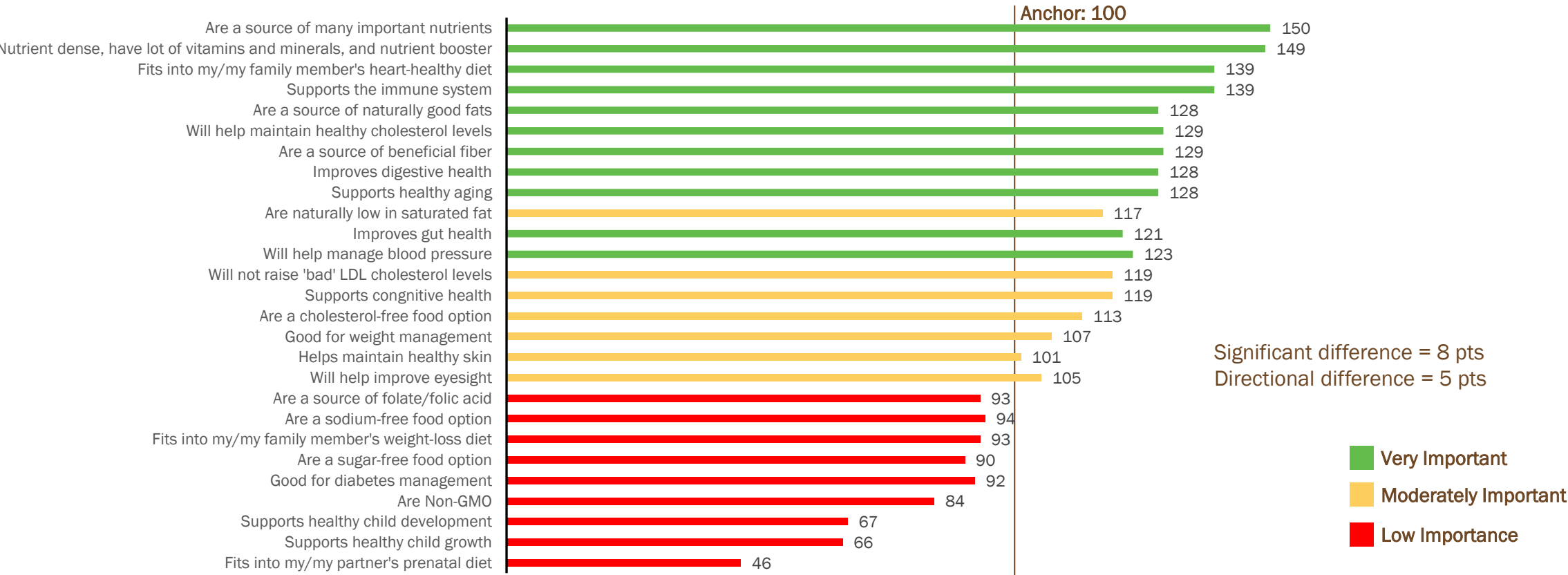
Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables

Among total avocado purchasers, The top two decision drivers when purchasing fresh product are being a source of many important nutrients and nutrient dense. Another 22 attributes are also very important. Most of the rest are moderately important.



Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables

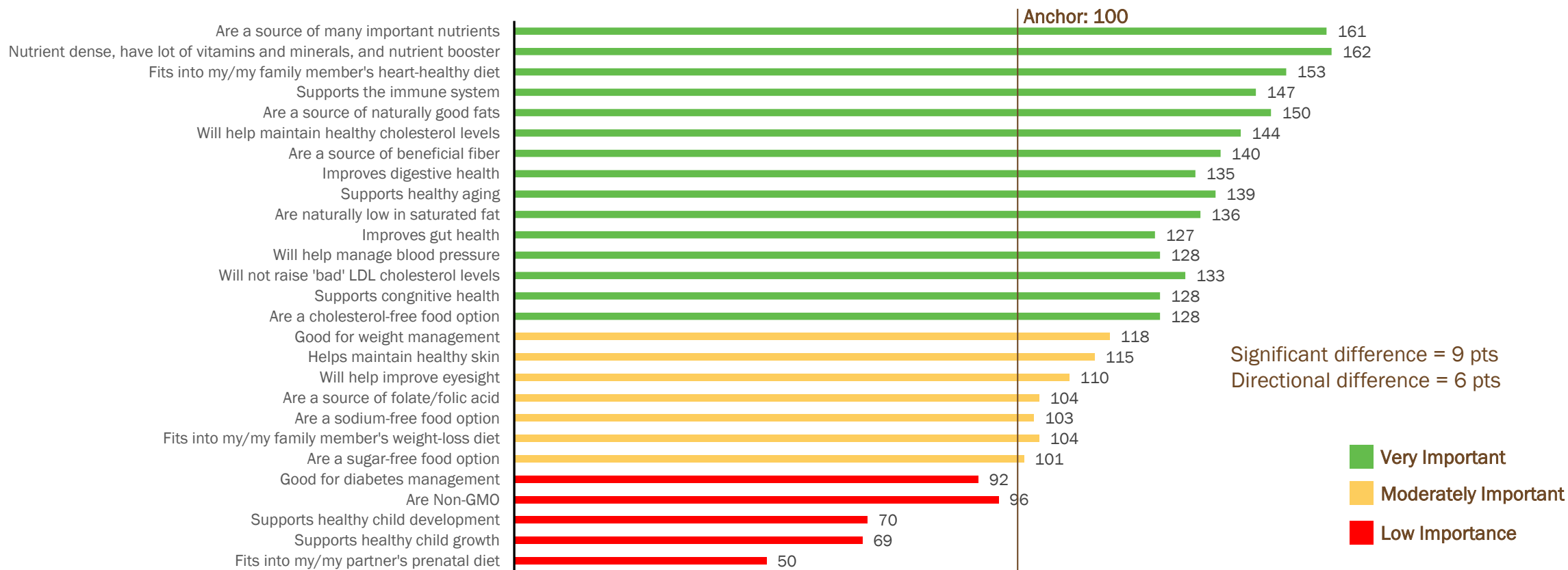
Non-purchasers of avocados have less attributes of high importance than seen overall (11 vs. 22) and many more non-important attributes than see in total (9 vs. 1).



Avocado Purchase Drivers and Barriers

Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables

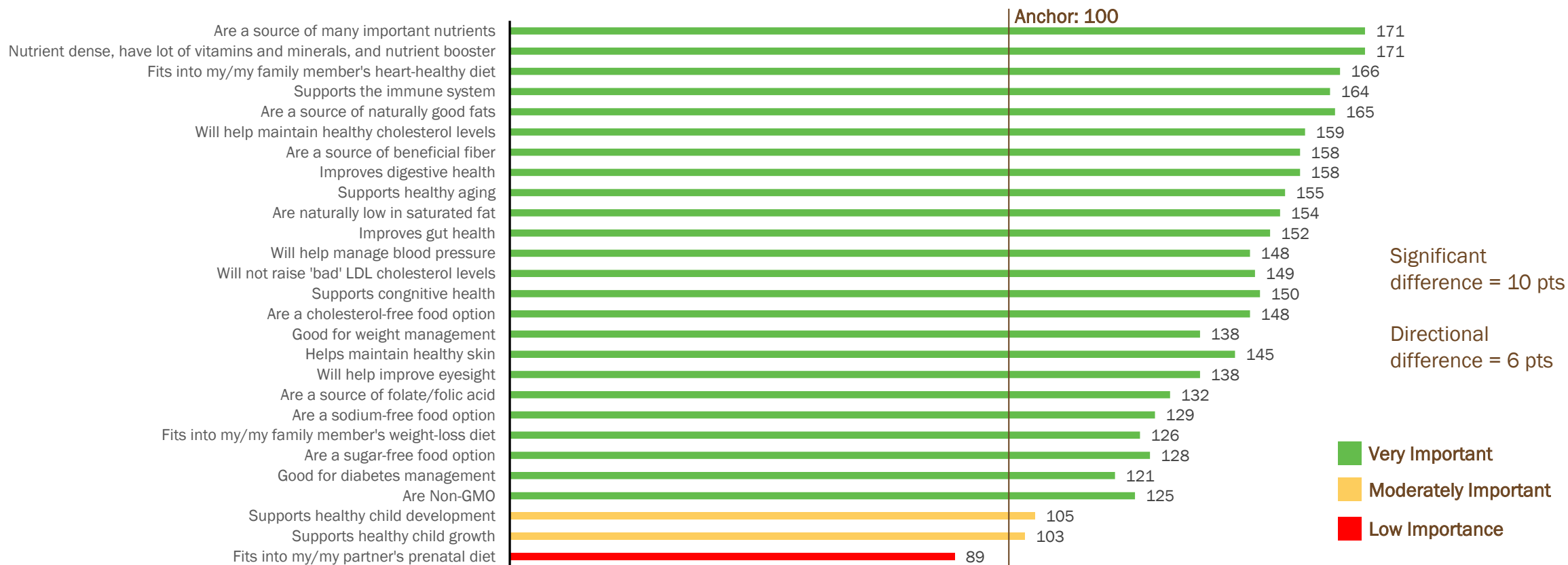
The most important attributes overall remain at the top among light avocado purchasers, but a number of them drop into moderate to low importance



Avocado Purchase Drivers and Barriers

Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables

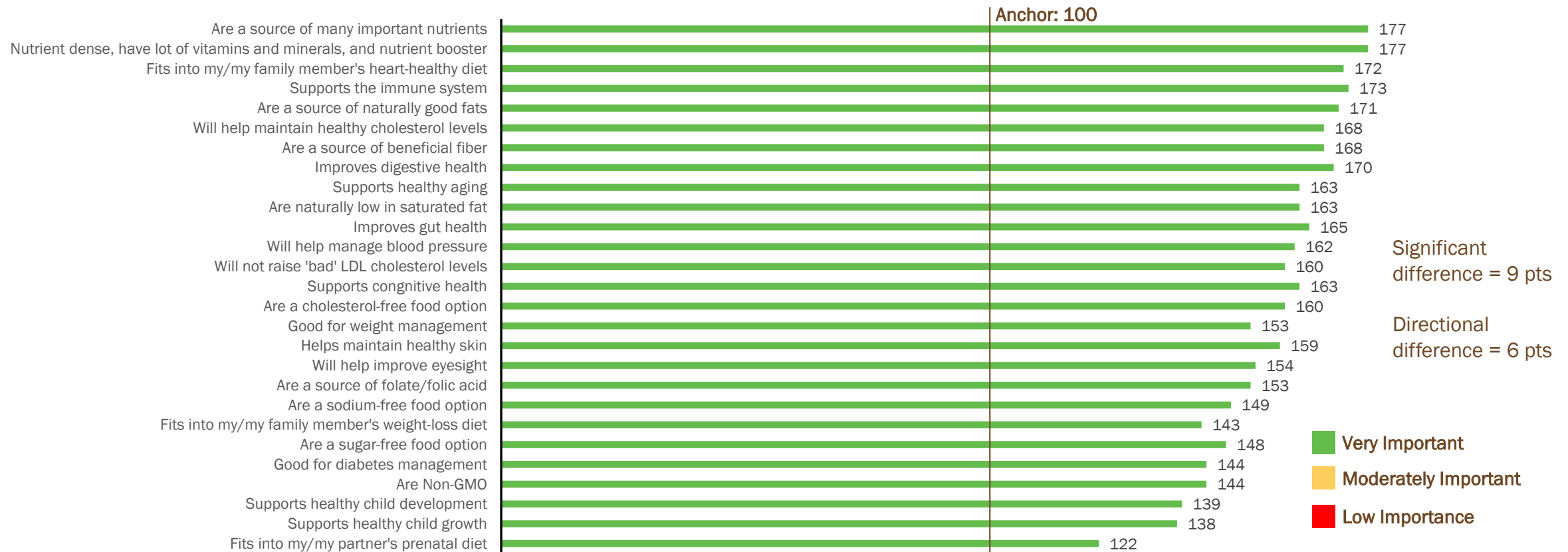
Medium avocado purchasers are more inline with the overall sample.



Avocado Purchase Drivers and Barriers

Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables

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 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.

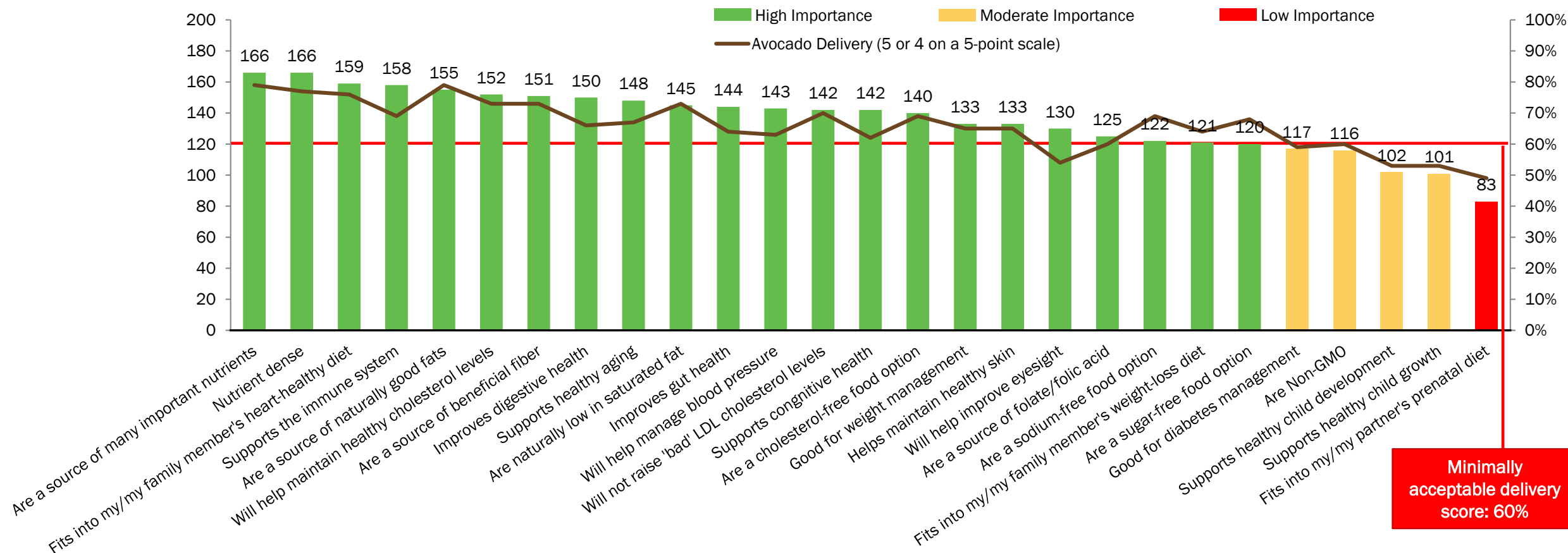
The importance continues to grown for a few attributes, as highlighted.

	Total Purchasers			Heavy			Super Heavy		
	2019 (n=1,544) A	2021 (n=1,727) B	2022 (n=1,815) C	2019 (n=382) A	2021 (n=440) B	2022 (n=518) C	2019 (n=473) A	2021 (n=360) B	2022 (n=355) C
Nutrient dense, have lot of vitamins and minerals, and nutrient booster (word change 2022)	170	169	171b	176	175	177	179	178	176
Are a source of many important nutrients	168	169	171a	175	176	177	178	177	177
Are a source of naturally good fats	161	163	164a	168	171	171	172	174	172
Supports healthy aging (word change 2022)	156	160aC	155	163	167a	163	169	171c	165
Are a source of beneficial fiber	153	159A	158A	163	167a	168a	168	172a	169
Supports the immune system (word change 2022)	153	157a	164AB	162	167a	173AB	168	172	174a
Will help maintain healthy cholesterol levels	152	157A	159A	159	167A	168A	166	171a	169
Improves digestive health	151	155a	157A	159	165a	170Ab	167	171	170
Are naturally low in saturated fat	149	153A	154A	157	164A	163a	163	169a	165
Improves gut health	142	149A	151A	150	162A	165A	160	168A	165
Will not raise 'bad' LDL cholesterol levels	142	148A	150A	149	160A	160A	158	164a	161
Will help manage blood pressure	141	148A	149A	145	159A	162A	158	166A	164a
Fits into my heart- healthy diet	140	146A	165AB	150	159A	172AB	159	166a	173AB
Are a cholesterol-free food option	137	147A	149A	144	160A	160A	155	165A	163A
Good for weight- management	135	141A	141A	142	155A	153A	153	161a	161A
Will help improve eyesight	131	137A	138A	136	152A	154A	151	159a	158a
Are a source of folate/ folic acid	127	134A	135A	135	151A	153A	149	159A	156a
Are a sodium-free food option	121	131A	132A	125	148A	149A	142	157A	153A
Are a sugar-free food option	118	129A	130A	119	147A	148A	141	155A	152A
Fits into my weight-loss diet	112	124A	130AB	120	143A	143A	136	152A	153A
Are Non-GMO	112	121A	126Ab	115	141A	144A	140	150A	146a
Good for diabetes management	111	125A	125A	114	144A	144A	137	156A	151A
Supports healthy child development	99	109A	113Ab	103	134A	139A	132	147A	149A
Supports healthy child growth	98	109A	112A	103	135A	138A	131	148A	148A
Fits into my partner's prenatal diet	78	97A	96A	82	123A	122A	112	135A	131A
Helps maintain healthy skin (new 2022)	NA	NA	143	NA	NA	159	NA	NA	161
Supports cognitive health (new 2022)	NA	NA	150	NA	NA	163	NA	NA	163

Avocado Purchase Drivers and Barriers

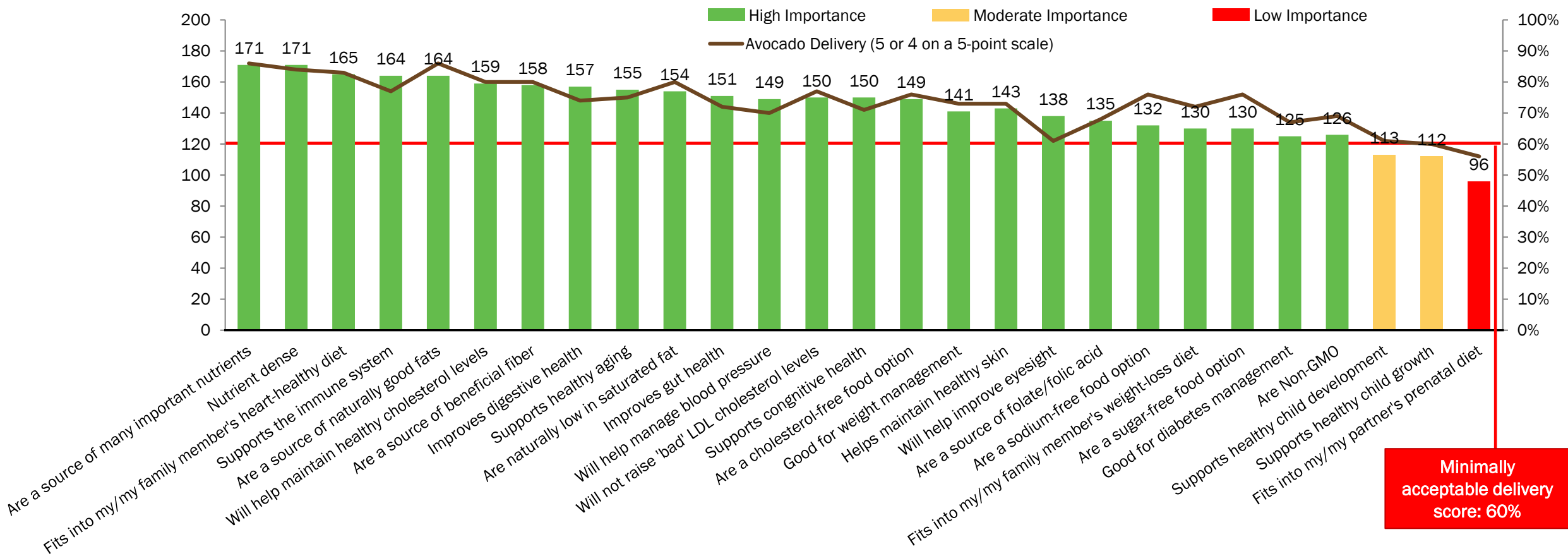
Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables vs. Avocado Delivery

Avocados continue to have reasonably strong perceived deliver against many, but not all of the most important attributes.



Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables vs. Avocado Delivery

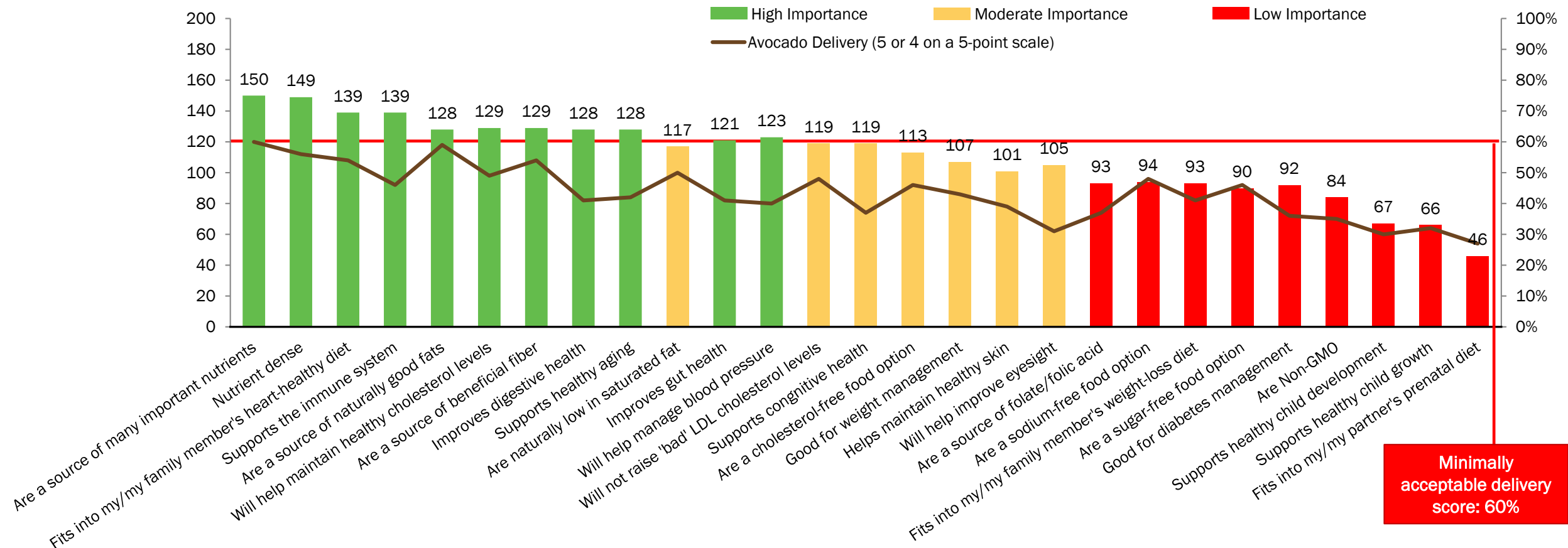
Among total avocado purchasers, Avocados have strong perceived deliver against all of the most important attributes except improving eyesight.



Avocado Purchase Drivers and Barriers

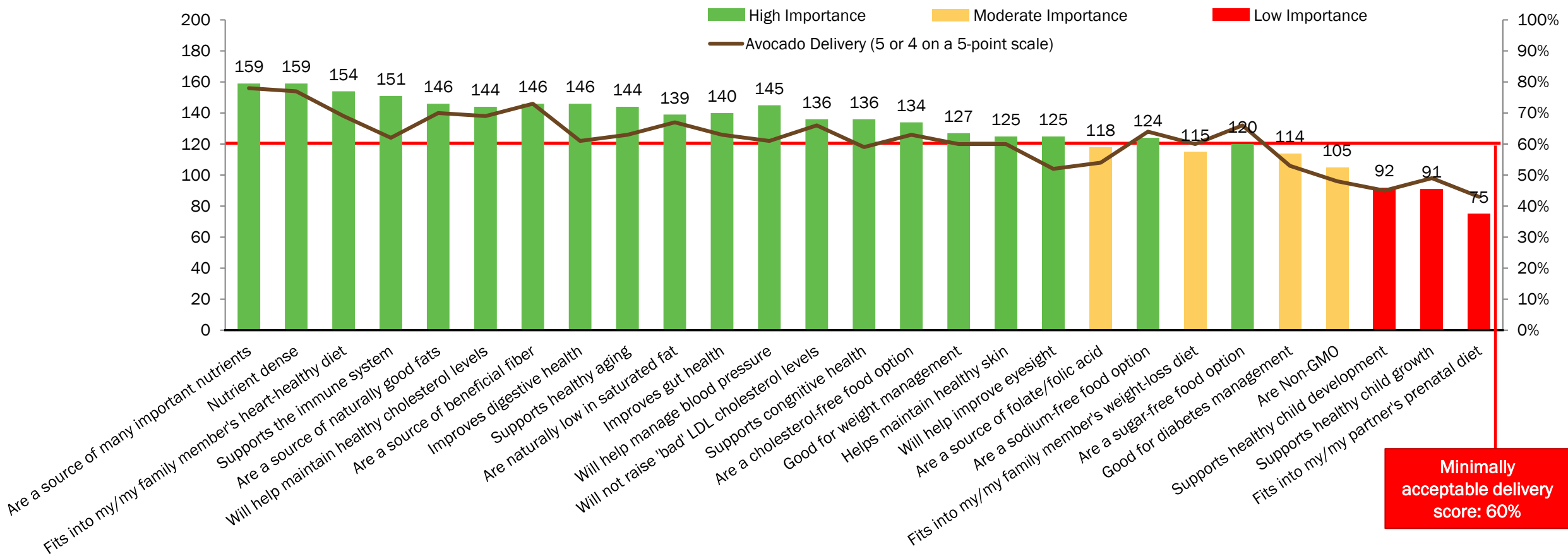
Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables vs. Avocado Delivery

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

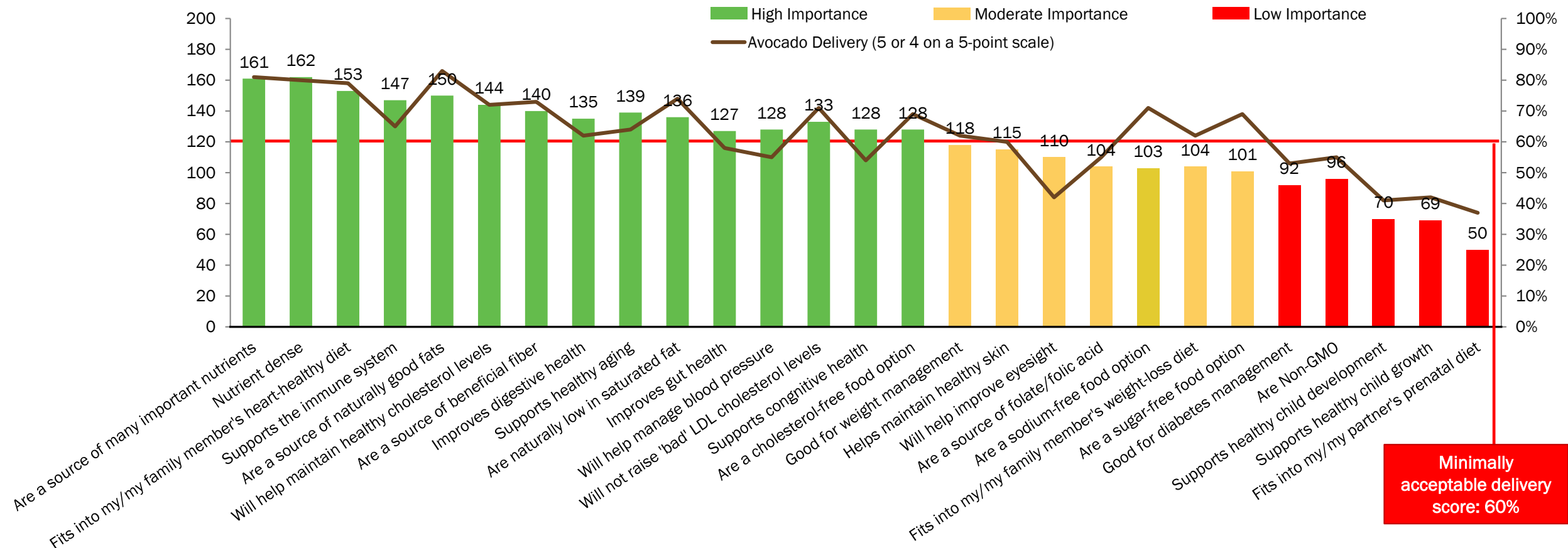
As seen before, Avocados receive stronger scores among non-purchasers who do order avocados when away from home than seen among non-purchasers overall.



Avocado Purchase Drivers and Barriers

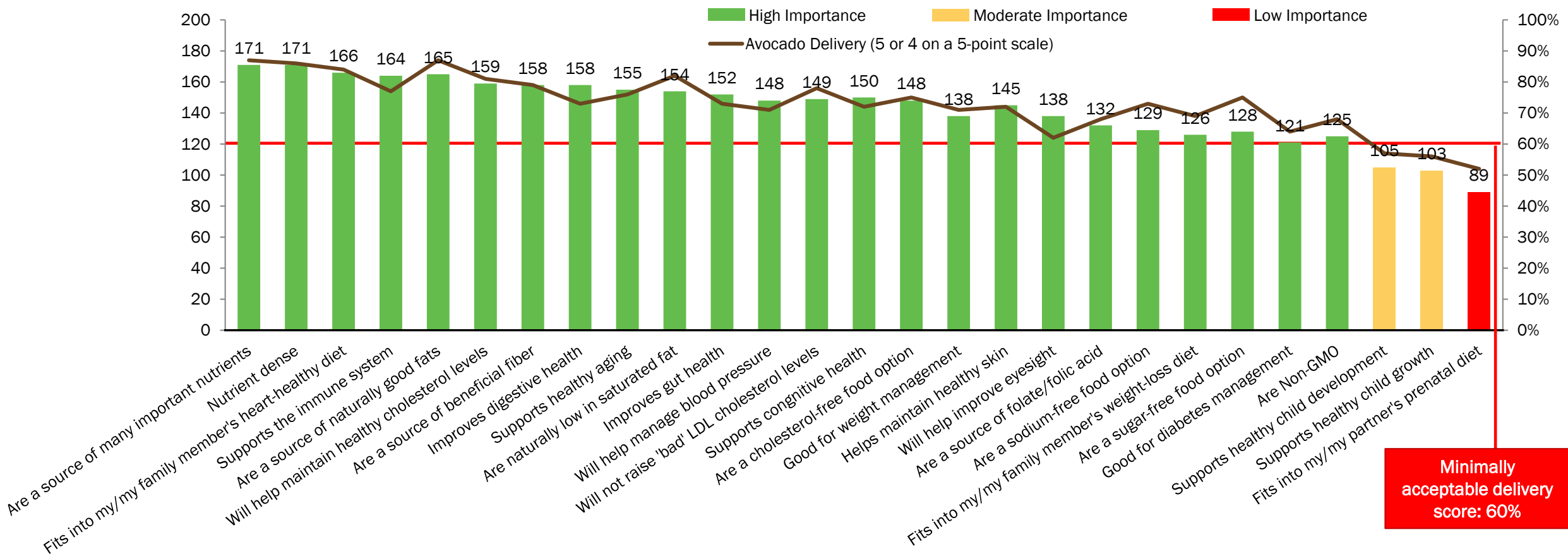
Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables vs. Avocado Delivery

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

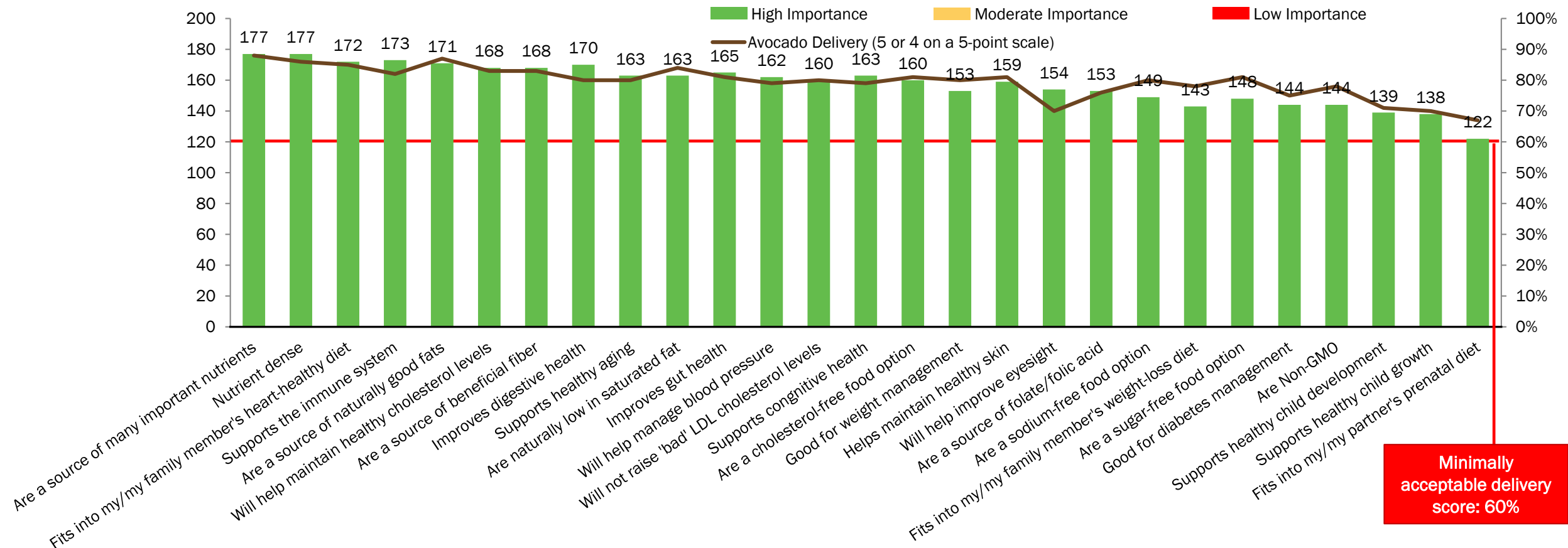
Avocados do very well for most of the most important attributes among medium purchasers.



Avocado Purchase Drivers and Barriers

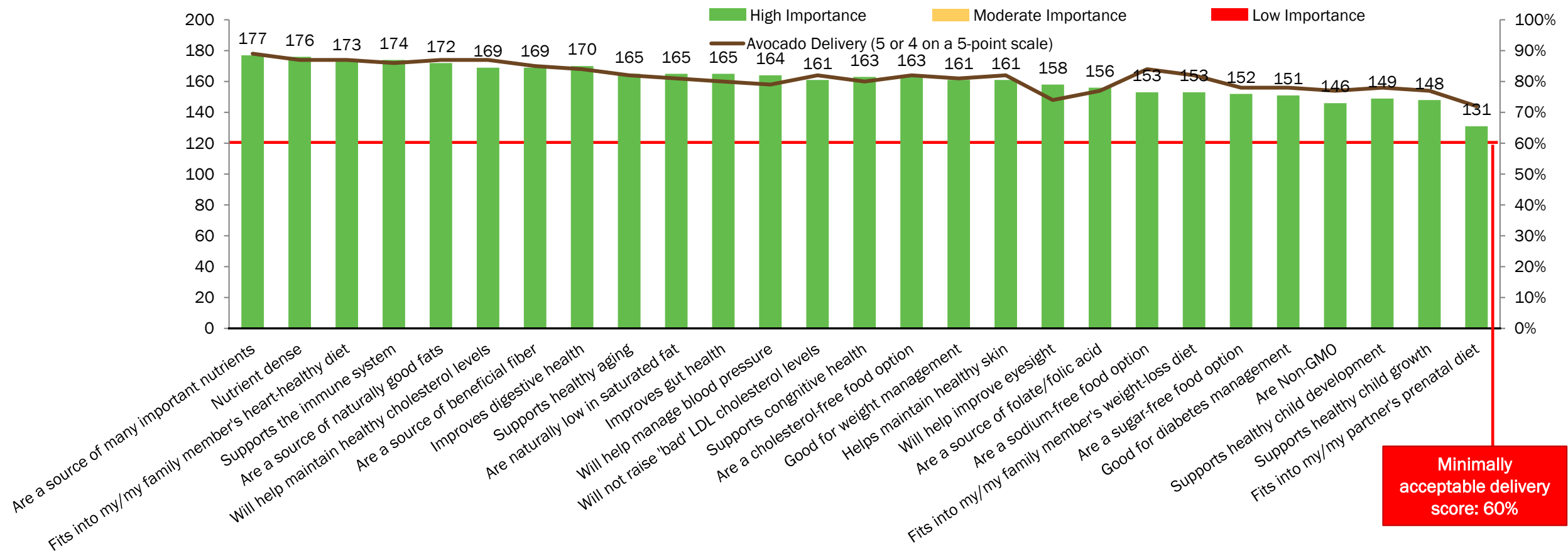
Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables vs. Avocado Delivery

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=2,401) %	Total Purchasers (n=1,815) %	Non-Purchasers (n=602) % A	Light (n=505) % B	Medium (n=421) % C	Heavy (n=518) % D	Super Heavy (n=355) % E
Are a source of many important nutrients	79	86	60	81A	87AB	88AB	89AB
Nutrient dense, have a lot of vitamins and minerals, and a nutrient booster	77	84	56	80A	86AB	86AB	87AB
Fits into my/my family member's heart-healthy diet	76	83	54	79A	84Ab	85AB	87AB
Supports the immune system	69	77	46	65A	77AB	82ABc	86ABCd
Are a source of naturally good fats	79	86	59	83A	87Ab	87Ab	87Ab
Will help maintain healthy cholesterol levels	73	80	49	72A	81AB	83AB	87ABCd
Are a source of beneficial fiber	73	80	54	73A	79AB	83AB	85ABC
Improves digestive health	66	74	41	62A	73AB	80ABC	84ABCd
Supports healthy aging	67	75	42	64A	76AB	80AB	82ABc
Are naturally low in saturated fat	73	80	50	74A	82AB	84AB	81AB
Improves gut health	64	72	41	58A	73AB	81ABC	80ABC
Will help manage blood pressure	63	70	40	55A	71AB	79ABC	79ABC
Will not raise 'bad' LDL cholesterol levels	70	77	48	71A	78AB	80AB	82ABc
Supports cognitive health	62	71	37	54A	72AB	79ABC	80ABC
Are a cholesterol-free food option	69	76	46	69A	75AB	81ABC	82ABC
Good for weight management	65	73	43	62A	71AB	80ABC	81ABC
Helps maintain healthy Skin	65	73	39	60A	72AB	81ABC	82ABC
Will help improve eyesight	54	61	31	42A	62AB	70ABC	74ABCd
Are a source of folate/ folic acid	60	68	37	55A	68AB	76ABC	77ABC
Are a sodium-free food option	69	76	48	71A	73A	80ABC	84ABCd
Fits into my/my family member's weight-loss diet	64	72	41	62A	69AB	78ABC	82ABCd
Are a sugar-free food option	68	76	46	69A	75AB	81ABC	78AB
Good for diabetes management	59	67	36	53A	64AB	75ABC	78ABC
Are non-GMO	60	69	35	55A	68AB	78ABC	77ABC
Supports healthy child development	53	61	30	41A	57AB	71ABC	78ABCD
Supports healthy child growth	53	60	32	42A	56AB	70ABC	77ABCD
Fits into my/my partner's prenatal diet	49	56	27	37A	52AB	67ABC	72ABCd

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 most of the attributes is similar to last year, but a few scores are up (highlighted below).

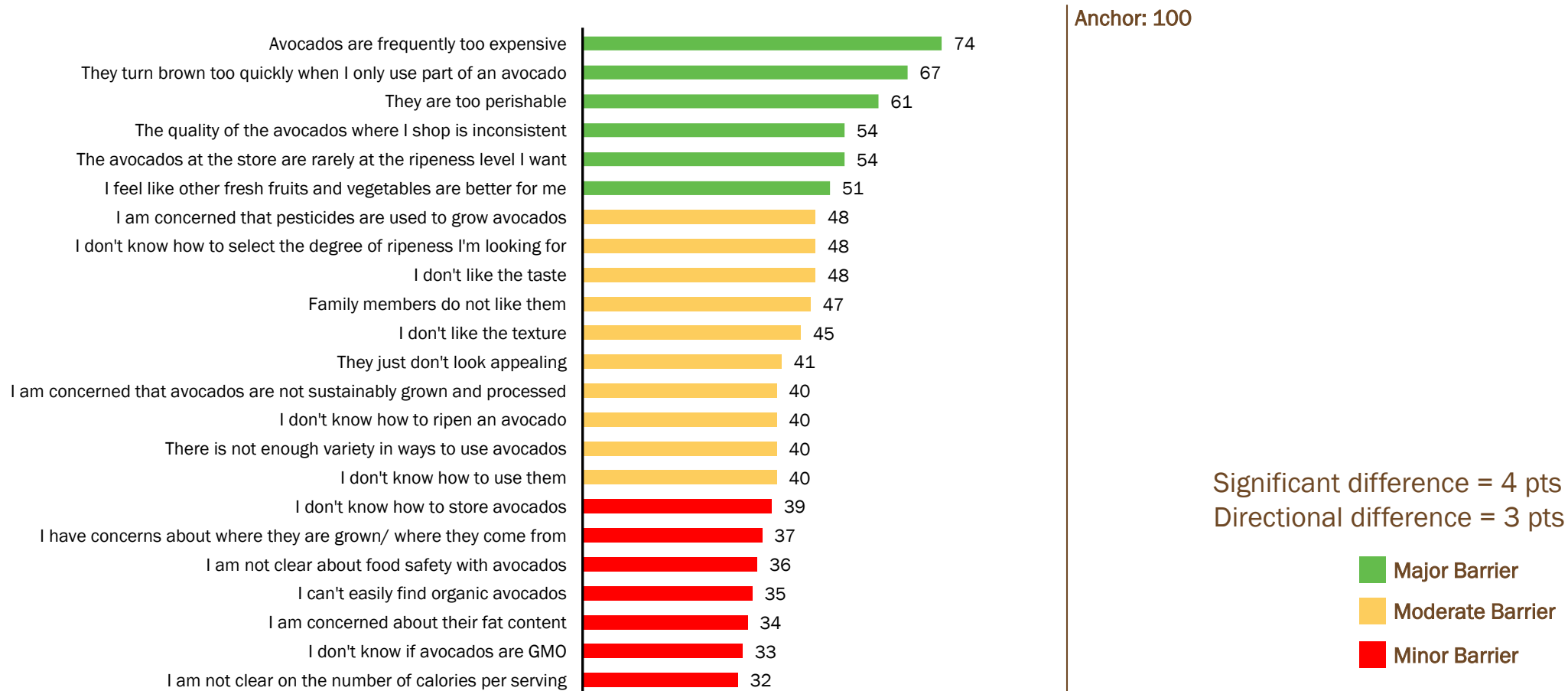
	Light			Medium			Heavy			Super Heavy		
	2019 (n=297) % A	2021 (n=499) % B	2022 (n=505) % C	2019 (n=384) % A	2021 (n=418) % B	2022 (n=421) % C	2019 (n=382) % A	2021 (n=440) % B	2022 (n=518) % C	2019 (n=473) % A	2021 (n=360) % B	2022 (n=355) % C
Are a source of many important nutrients	76	79	81a	85	84	87	90	88	88	91B	86	89
Nutrient dense, have a lot of vitamins and minerals, and a nutrient booster (word change 2022)	77	78	80	81	83	86A	87	85	86	90bc	86	87
Fits into my/my family member's heart-healthy diet	60	65a	79AB	70	76a	84AB	80	84a	85A	84	86	87
Supports the immune system (word change 2022)	62	63	65	69	77A	77A	79	80	82	82	85	86a
Are a source of naturally good fats	82	82	83	85	85	87	90	88	87	89	88	87
Will help maintain healthy cholesterol levels	64	69a	72A	75	81A	81A	81	83	83	85	89a	87
Are a source of beneficial fiber	65	73A	73A	80	79	79	85	84	83	85	85	85
Improves digestive health	57	65A	62a	71	76a	73	76	80a	80a	83	85	84
Supports healthy aging (word change 2022)	66	69c	64	75	80a	76	82	82	80	85c	85	82
Are naturally low in saturated fat	69	72	74a	75	79a	82A	84	87ac	84	87C	87C	81
Improves gut health	53	60a	58	67	69	73a	74	78	81Ab	79	81	80
Will help manage blood pressure	53	59ac	55	61	69A	71A	70	79A	79A	78	85Ac	79
Will not raise 'bad' LDL cholesterol levels	69	69	71	70	76a	78A	79	81	80	81	83	82
Supports cognitive health (added 2022)	NA	NA	54	NA	NA	72	NA	NA	79	NA	NA	80
Are a cholesterol-free food option	64	67	69a	71	76a	75a	77	83A	81a	79	88AC	82
Good for weight management (word change 2021)	55	61a	62A	68	71	71	77	78	80	81	83	81
Helps maintain healthy Skin (added 2022)	NA	NA	60	NA	NA	72	NA	NA	81	NA	NA	82
Will help improve eyesight	39	47Ac	42	53	61A	62A	64	72A	70a	74	79ac	74
Are a source of folate/ folic acid	51	55	55	64	63	68b	73	78a	76	75	83Ac	77
Are a sodium-free food option	62	69a	71A	70	77Ac	73	82	83c	80	78	83a	84A
Fits into my/my family member's weight-loss diet	44	51a	62AB	61	65	69Ab	71	76a	78A	76	81a	82A
Are a sugar-free food option	64	70a	69a	75	74	75	80	81	81	81	82c	78
Good for diabetes management	46	50	53a	58	63a	64a	64	74A	75A	72	81A	78A
Are non-GMO	49	52	55a	58	65A	68A	66	78A	78A	75	79	77
Supports healthy child development	33	38a	41A	53	54	57	59	70A	71A	71	78A	78A
Supports healthy child growth	35	41a	42a	52	55	56	63	72A	70A	71	79A	77a
Fits into my/my partner's prenatal diet (word change 2021)	26	35A	37A	39	49A	52A	50	67A	67A	65	70a	72A

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 Purchase Drivers and Barriers

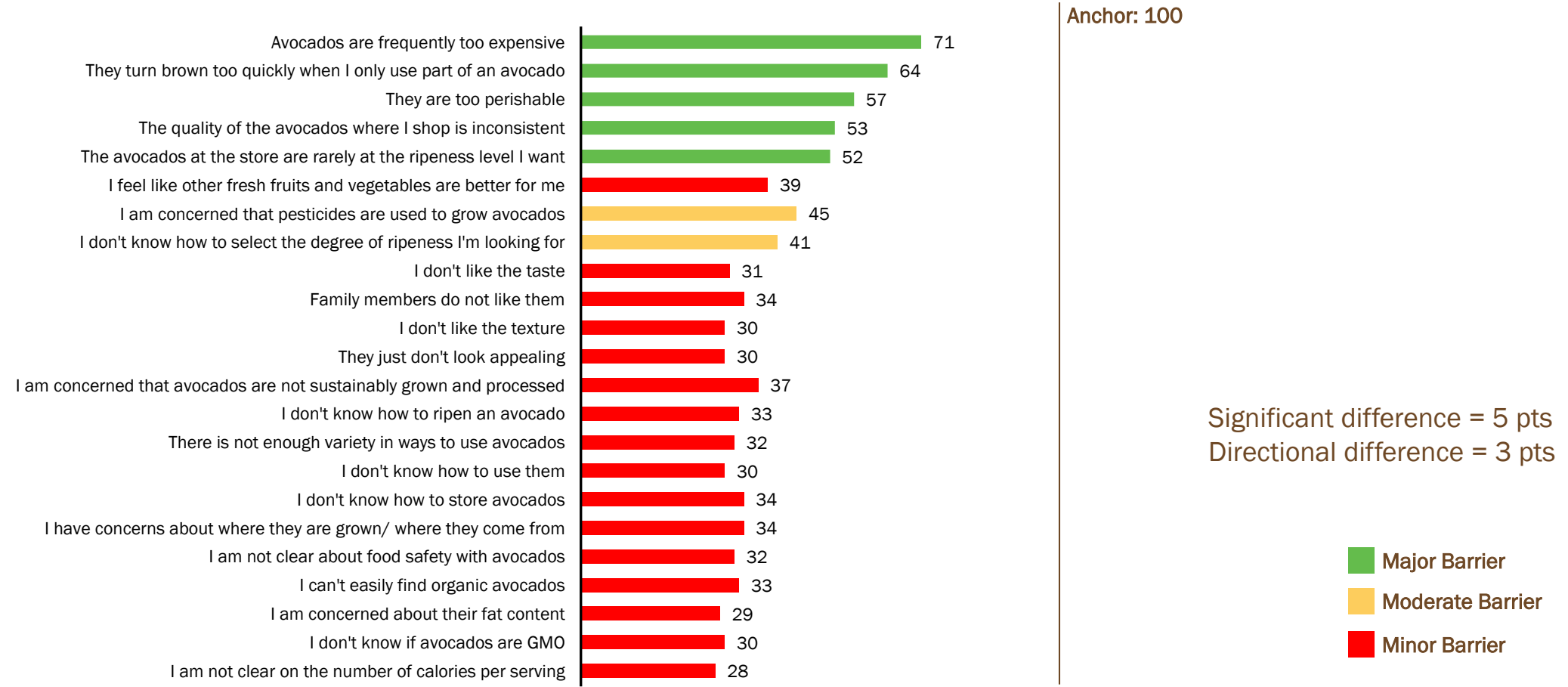
Barriers to Purchasing Avocados (More Often)

Frequently being too expensive is the top barrier to purchasing avocados. Turning brown too quickly when partially used and being too perishable are strong secondary and tertiary barriers. Good news – there are only 6 major barriers, compared to 10 last year.



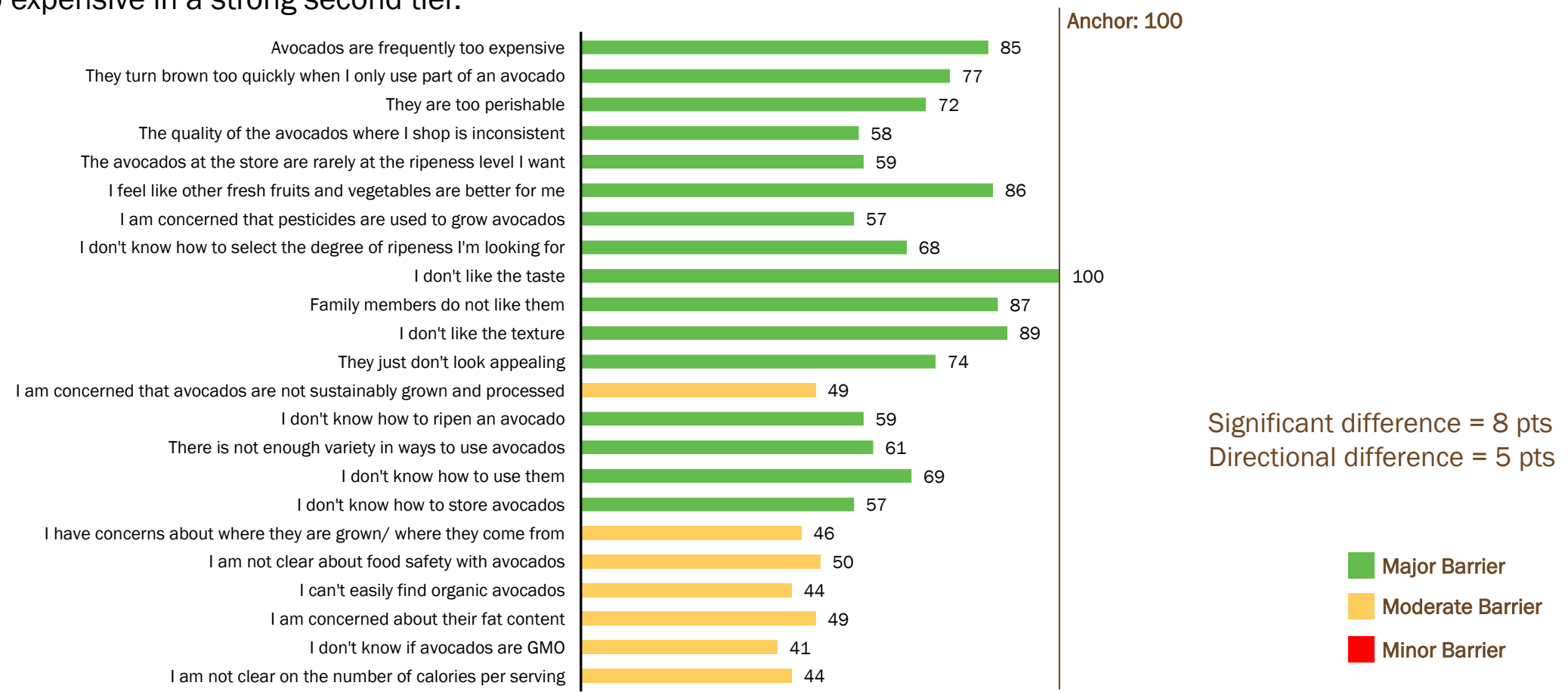
Barriers to Purchasing Avocados (More Often)

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.



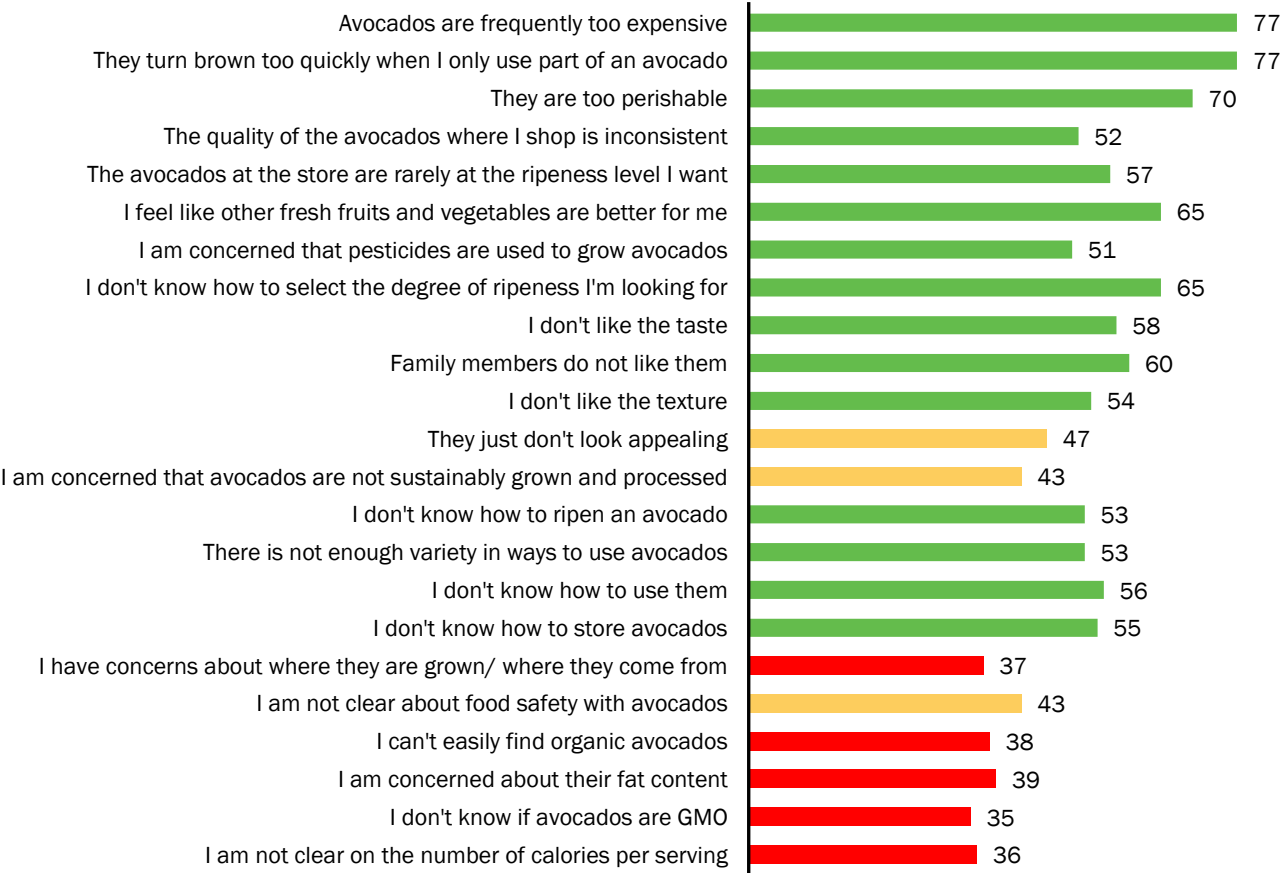
Barriers to Purchasing Avocados

As seen before, 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

As seen before, 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

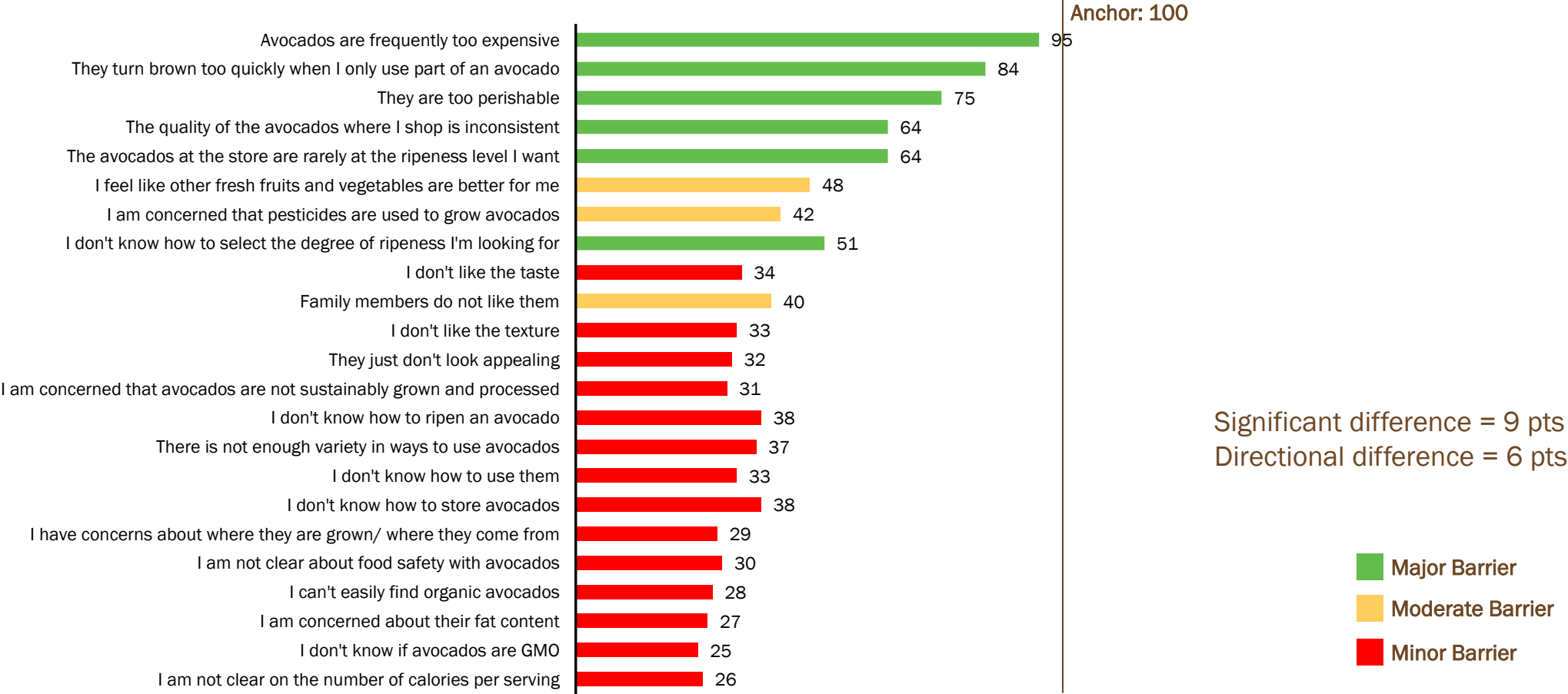
Proportion of Non-Purchasers who
order avocados when away from
home:
20%

Significant difference = 16 pts
Directional difference = 11 pts

- Major Barrier
- Moderate Barrier
- Minor Barrier

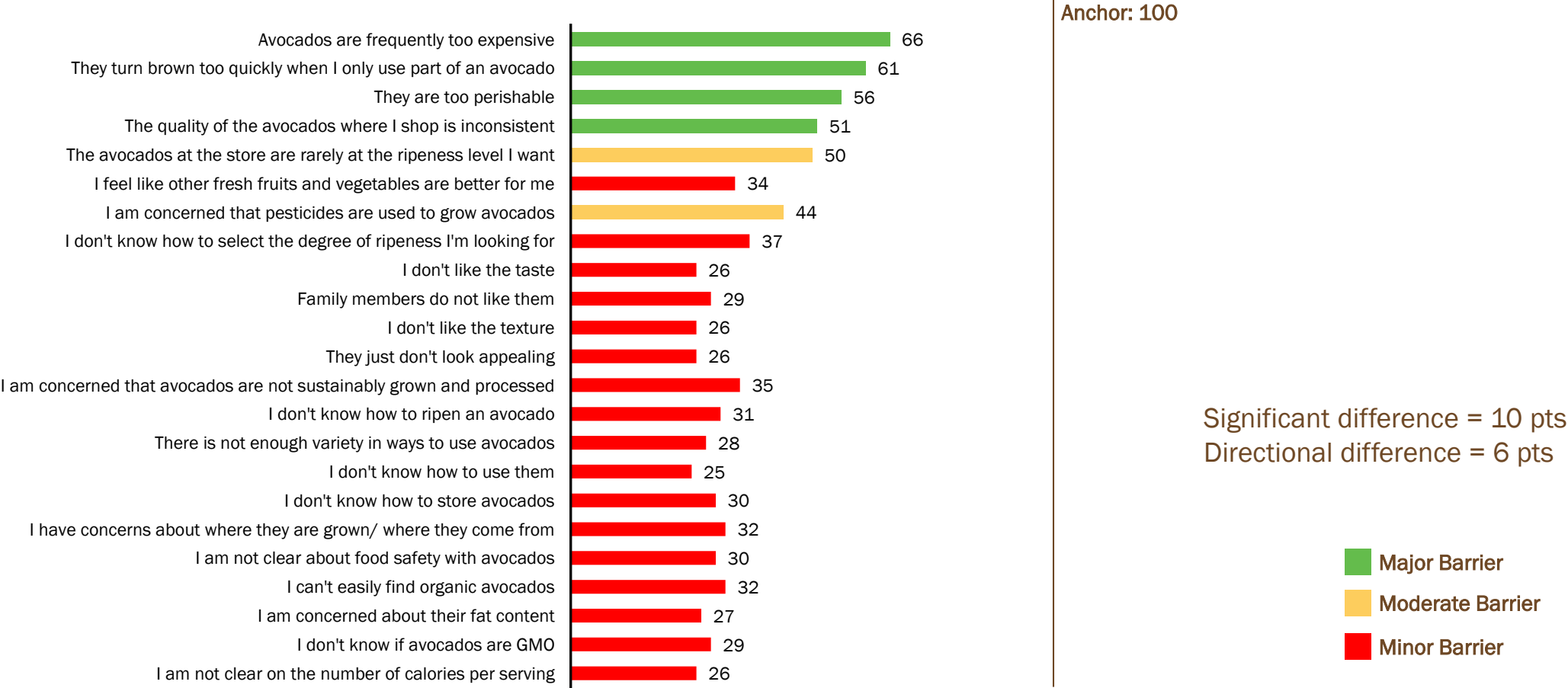
Barriers to Purchasing Avocados More Often

Frequently being too expensive is the top barrier for light purchasers.



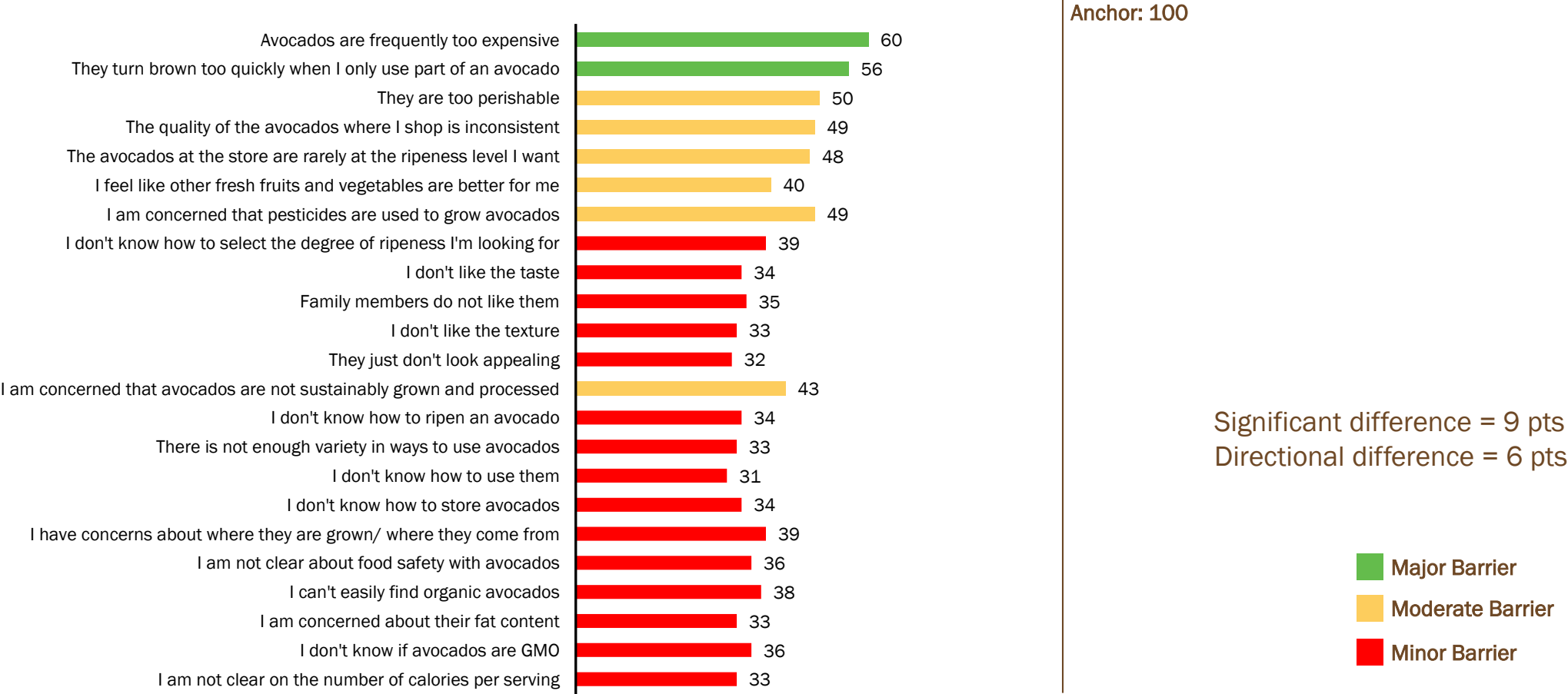
Barriers to Purchasing Avocados More Often

Frequently being too expensive and turning brown too quickly are top barriers for medium purchasers.



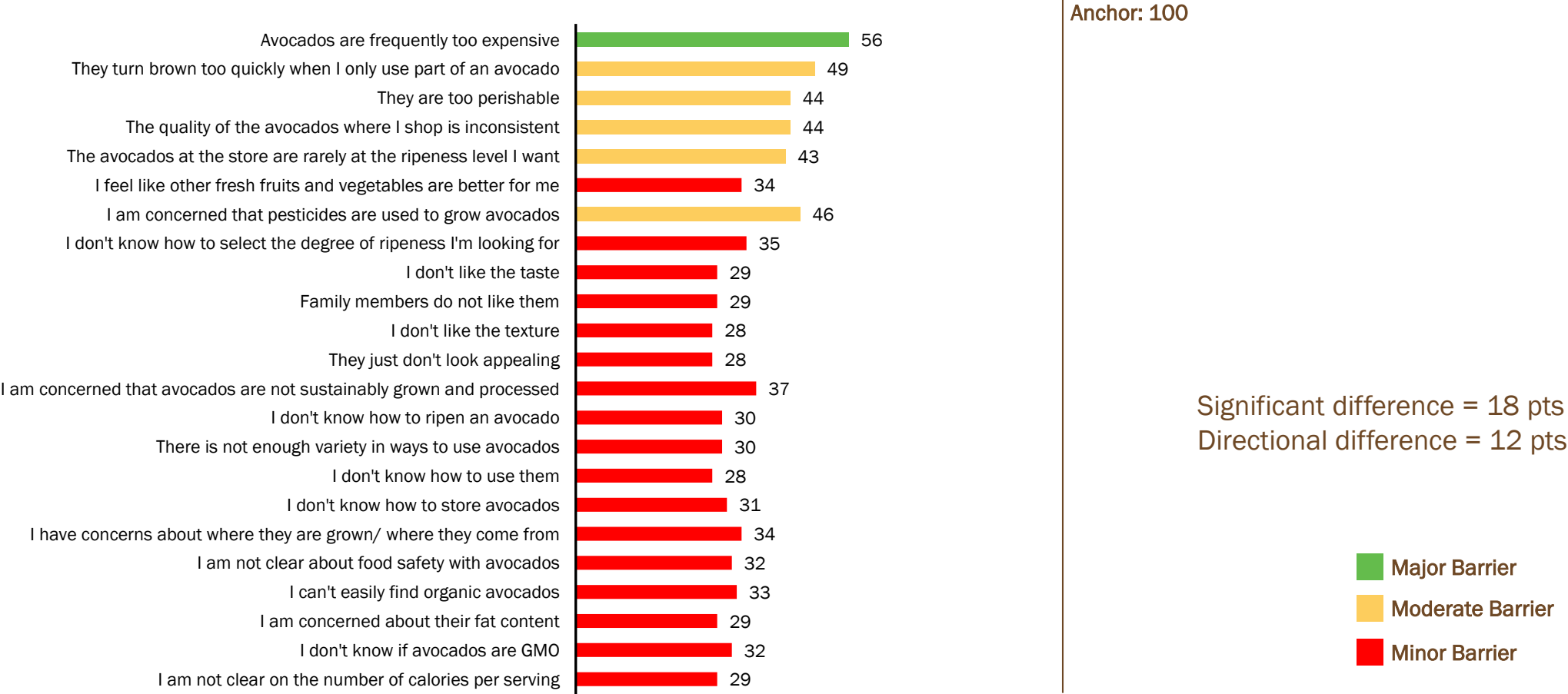
Barriers to Purchasing Avocados More Often

Frequently being too expensive and turning brown too quickly are also the top barriers for heavy purchasers.



Barriers to Purchasing Avocados More Often

Frequently being too expensive is the only major barrier among Super Heavy purchasers.



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=2,401)	Total Purchasers (n=1,815)	Non-Purchasers (n=602) A	Light (n=505) B	Medium (n=421) C	Heavy (n=518) D	Super Heavy (n=355) E
Avocados are frequently too expensive	74	71	85CDE	95ACDE	66dE	60	56
They turn brown too quickly when I only use part of an avocado	67	64	77CDE	84aCDE	61dE	56e	49
They are too perishable	61	57	72CDE	75CDE	56dE	50e	44
The quality of the avocados where I shop is inconsistent	54	53	58cDE	64aCDE	51e	49	44
The avocados at the store are rarely at the ripeness level I want	54	52	59CDE	64aCDE	50e	48e	43
I feel like other fresh fruits and vegetables are better for me	51	39	86BCDE	48CDE	34	40ce	34
I am concerned that pesticides are used to grow avocados	48	45	57BCDE	42	44	49Bc	46
I don't know how to select the degree of ripeness I'm looking for	48	41	68BCDE	51CDE	37	39	35
I don't like the taste	48	31	100BCDE	34Ce	26	34Ce	29
Family members do not like them	47	34	87BCDE	40CdE	29	35Ce	29
I don't like the texture	45	30	89BCDE	33Ce	26	33C	28
They just don't look appealing	41	30	74BCDE	32c	26	32C	28
I don't know how to ripen an avocado	40	33	59BCDE	38CdE	31	34	30
There is not enough variety in ways to use avocados	40	32	61BCDE	37CE	28	33c	30
I don't know how to use them	40	30	69BCDE	33Ce	25	31c	28
I don't know how to store avocados	39	34	57BCDE	38CE	30	34c	31
I am not clear about food safety with avocados	36	32	50BCDE	30	30	36Bc	32

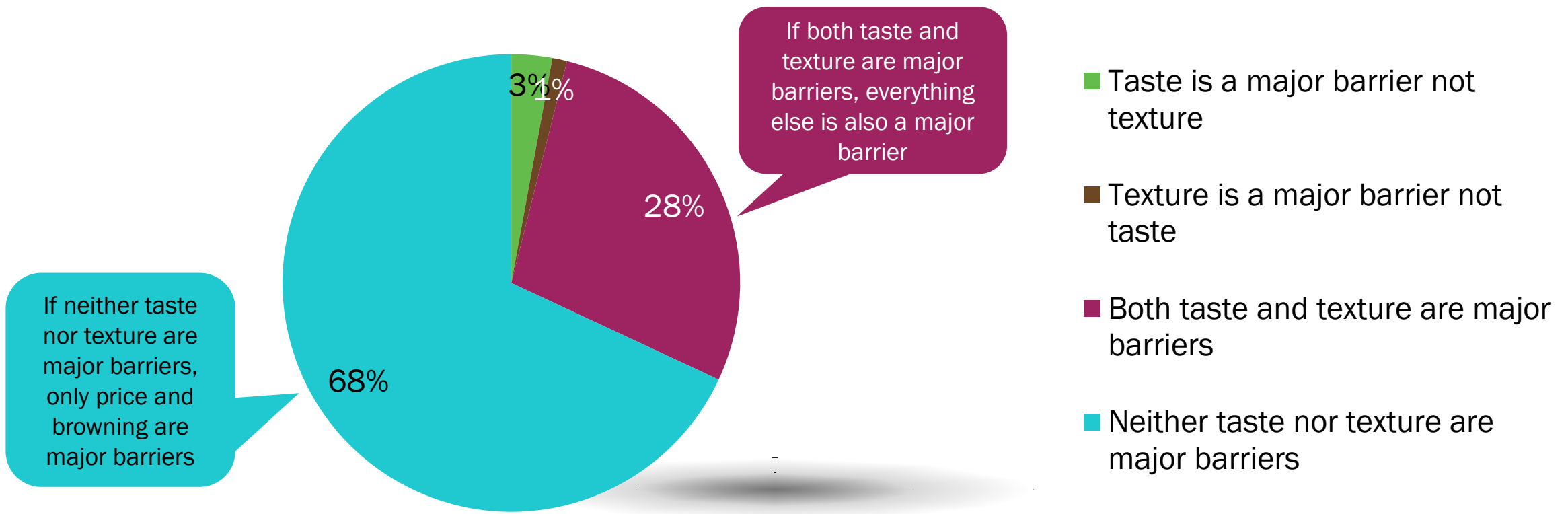
Barriers to Purchasing Avocados More Often

Many of the barriers where we saw increases last year among Heavy and Super Heavy purchasers, are down this year.

	Light			Medium			Heavy			Super Heavy		
	2019 (n=297)	2021 (n=499)	2022 (n=505)	2019 (n=384)	2021 (n=418)	2022 (n=421)	2019 (n=382)	2021 (n=440)	2022 (n=518)	2019 (n=473)	2021 (n=360)	2022 (n=355)
	% A	% B	% C	% A	% B	% C	% A	% B	% C	% A	% B	% C
Avocados are frequently too expensive	85	84	95AB	83BC	67	66	75bC	66c	60	65C	59	56
They turn brown too quickly when I only use part of an avocado	85	82	84	69c	65	61	64C	63c	56	55c	56c	49
They are too perishable	76	70	75b	59	56	56	55c	57c	50	49	50c	44
The quality of the avocados where I shop is inconsistent	57	65a	64a	55	52	51	55c	54c	49	49	50c	44
The avocados at the store are rarely at the ripeness level I want	57	65A	64a	54	53	50	54c	54c	48	48	51c	43
I feel like other fresh fruits and vegetables are better for me	48	49	48	32	37a	34	30	46Ac	40A	33	42AC	34
I am concerned that pesticides are used to grow avocados	42	47c	42	40	46a	44	39	52A	49A	44	52Ac	46
I don't know how to select the degree of ripeness I'm looking for	52	53	51	40	40	37	35	46Ac	39	36	45AC	35
I don't like the taste	38	36	34	25	30a	26	23	41Ac	34A	29	37Ac	29
Family members do not like them	45bc	40	40	29	32	29	25	40Ac	35A	31	38aC	29
I don't like the texture	34	34	33	24	29a	26	22	40Ac	33A	29	36ac	28
They just don't look appealing	32	34	32	24	28a	26	23	40AC	32A	28	37AC	28
I am concerned that avocados are not sustainably grown and processed	27	36Ac	31a	26	35A	35A	23	45A	43A	32	43Ac	37a
I don't know how to ripen an avocado	39	40	38	30	34	31	28	40Ac	34a	32	38aC	30
There is not enough variety in ways to use avocados	40	39	37	29	33ac	28	26	41AC	33A	31	39AC	30
I don't know how to use them	39c	35	33	26	29c	25	22	39AC	31A	28	36AC	28
I don't know how to store avocados	39	36	38	28	32	30	27	40Ac	34A	31	38ac	31
I have concerns about where they are grown/ where they come from	29	33ac	29	26	33A	32A	25	44A	39A	33	42AC	34
I am not clear about food safety with avocados	30	32	30	26	30a	30a	24	40A	36A	32	37ac	32
I can't easily find organic avocados	27	29	28	26	32A	32a	23	39A	38A	32	39ac	33
I am concerned about their fat content	30	31c	27	25	30a	27	22	40Ac	33A	31	37aC	29
I don't know if avocados are GMO	26	27	25	25	29	29a	22	38A	36A	31	39ac	32
I am not clear on the number of calories per serving	26	29	26	23	28a	26	21	38Ac	33A	28	38AC	29

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.

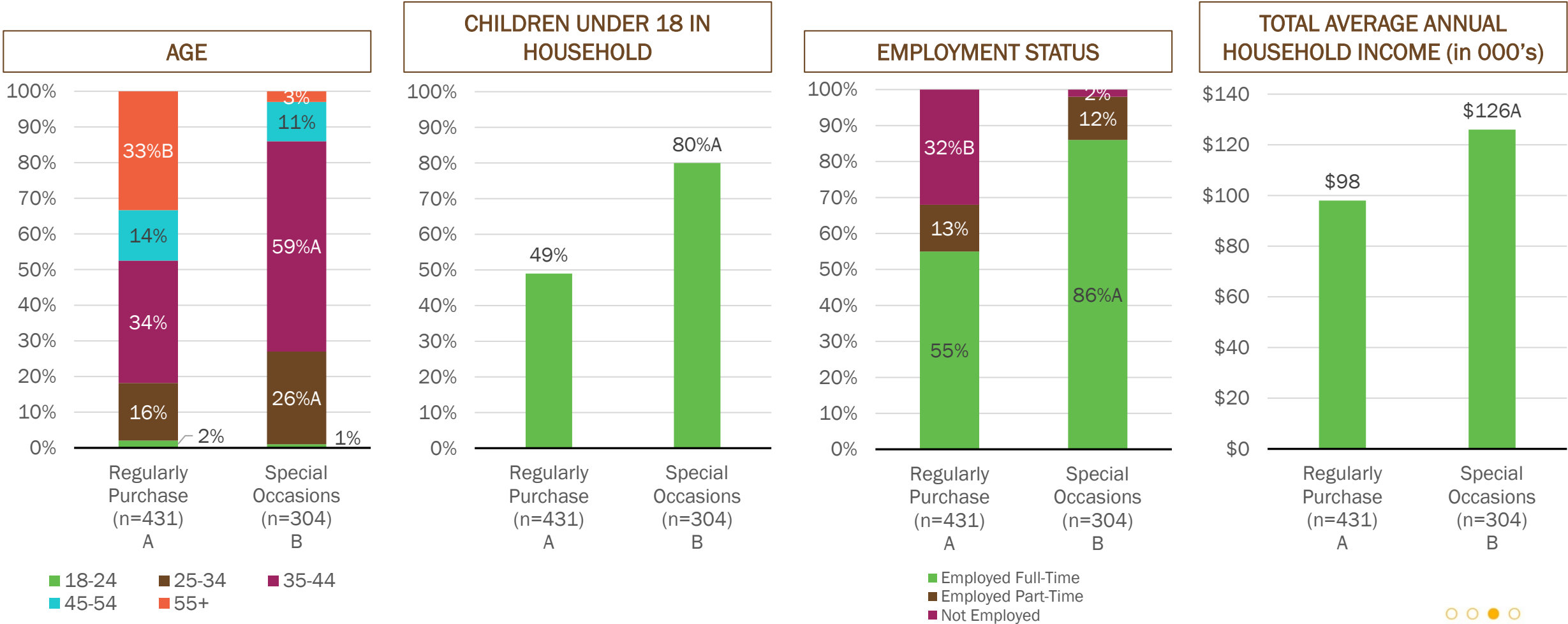


Heavy/Super Heavy Purchaser Deep Dive

Understanding regular vs. primarily special occasion purchasers among heavy/super heavy purchasers.

Demographics

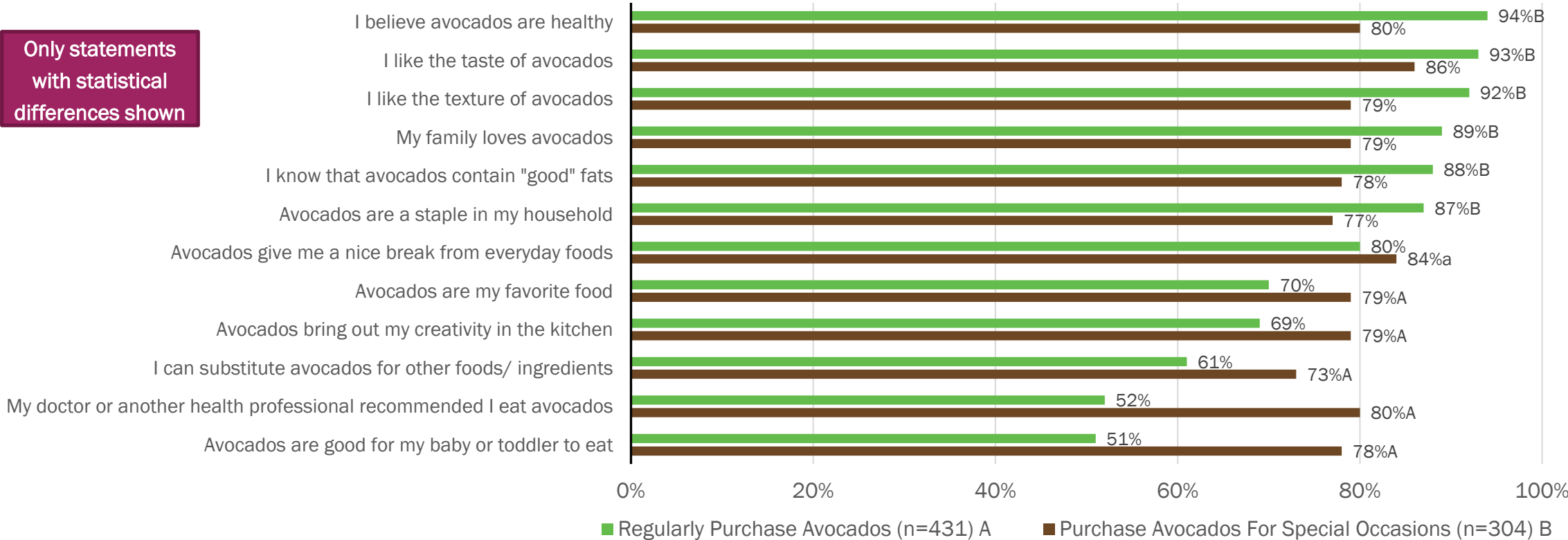
Heavy/Super Heavy special occasion purchasers skew to age 25-44, they are more likely to have children in the home, more likely to be employed, and have a higher household income.



Reasons For Purchasing Avocados

(5 or 4 On a 5-point Scale)

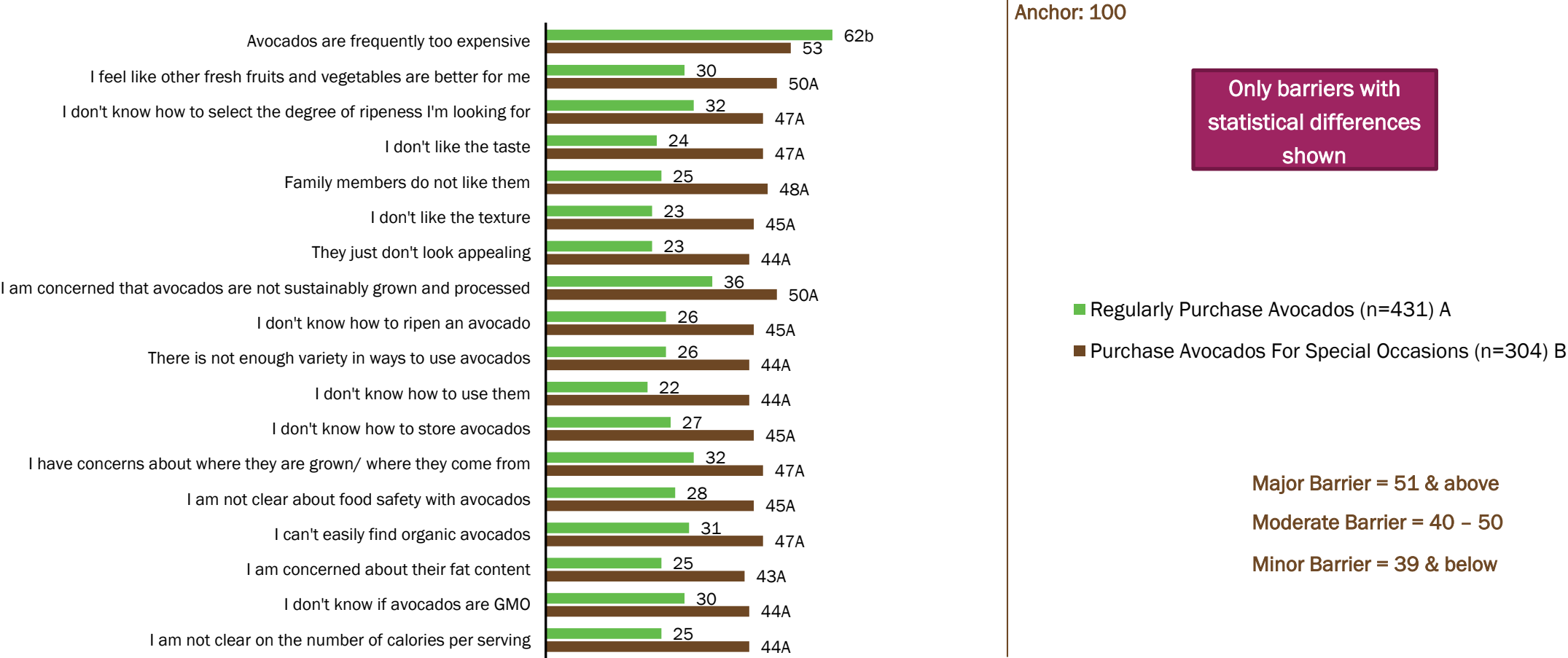
There are numerous differences in why each group purchases avocados.



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”.

Barriers to Purchasing Avocados (More Often)

There are also many differences as to barriers to purchasing avocados. The special occasion purchaser has many more barriers.

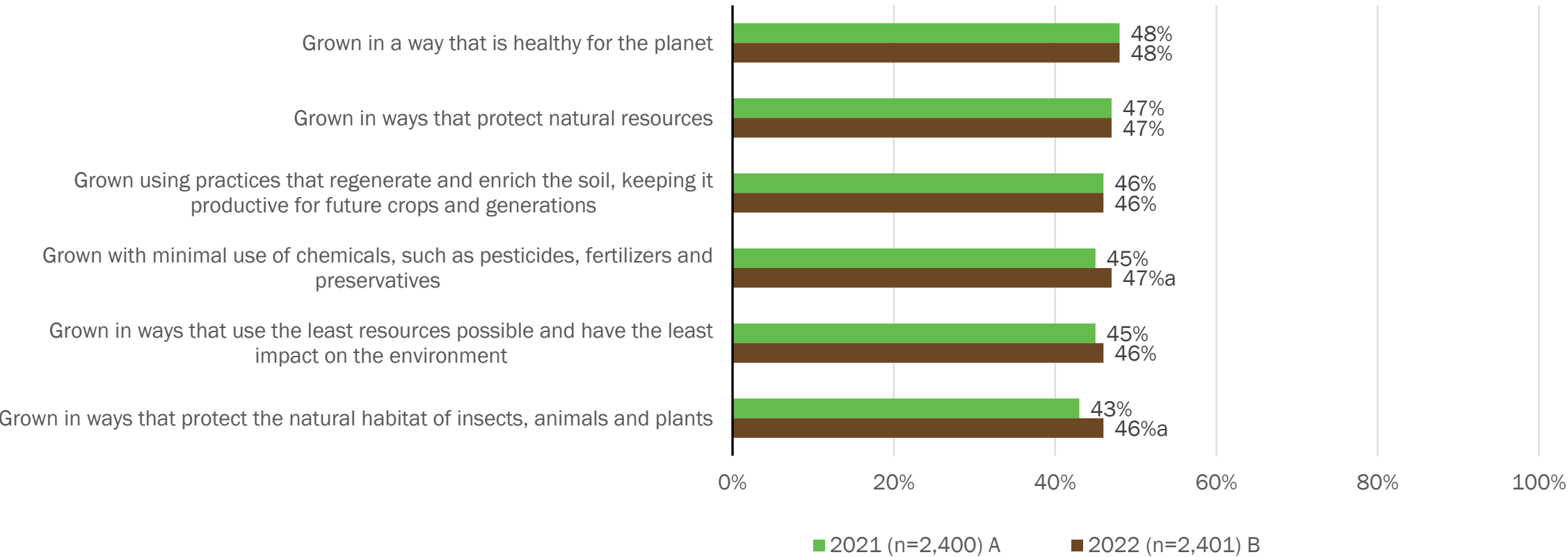


Sustainability

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. This has not changed since last year.



Sustainability Statements Associated With Avocados

(5 or 4 On a 5-point Scale)

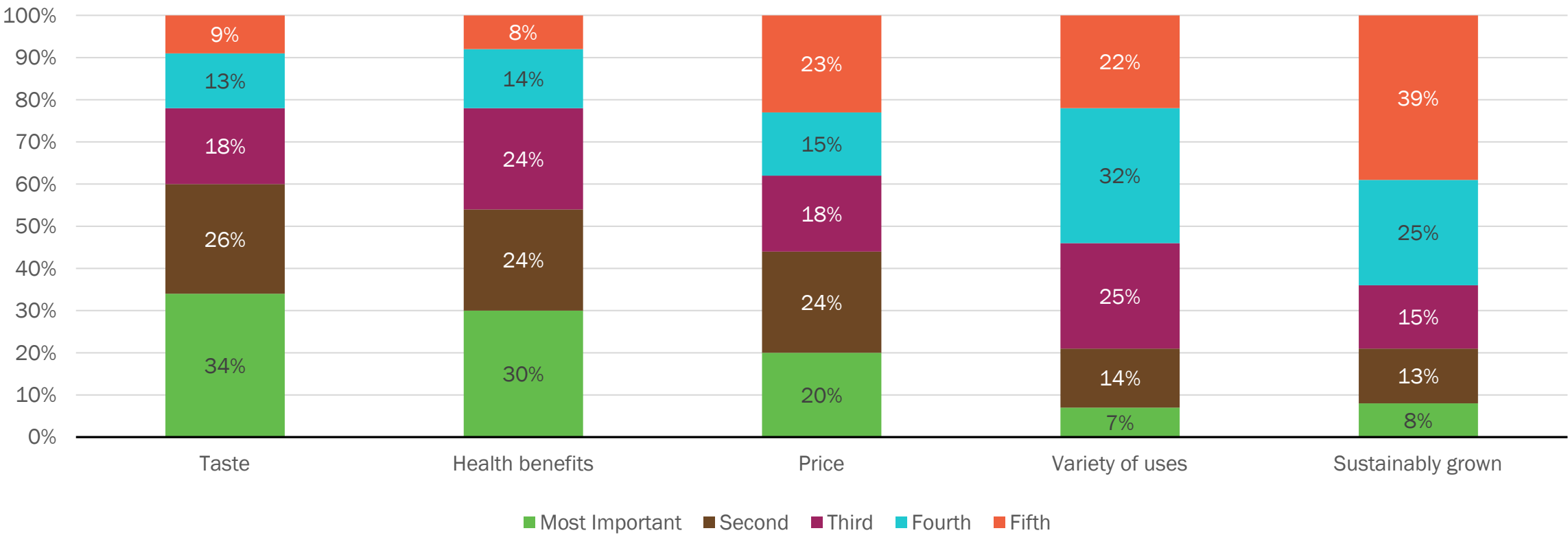
Avocados have much stronger association with good sustainability practices among Heavy and Super Heavy avocado purchasers.

	Total Purchasers (n=1,815) %	Non-Purchasers (n=602) % A	Light (n=505) % B	Medium (n=421) % C	Heavy (n=518) % D	Super Heavy (n=355) % E
Grown in a way that is healthy for the planet	56	24	35A	56AB	68ABC	67ABC
Grown with minimal use of chemicals, such as pesticides, fertilizers and preservatives	54	28	34A	53AB	64ABC	67ABC
Grown in ways that protect natural resources	54	25	34A	53AB	68ABC	66ABC
Grown using practices that regenerate and enrich the soil, keeping it productive for future crops and generations	53	25	32A	51AB	67ABC	65ABC
Grown in ways that protect the natural habitat of insects, animals and plants	53	22	31A	51AB	67ABC	68ABC
Grown in ways that use the least resources possible and have the least impact on the environment	52	25	33A	50AB	64ABC	66ABC

Importance Ranking of Avocado Attributes

(Total Sample) (2022)

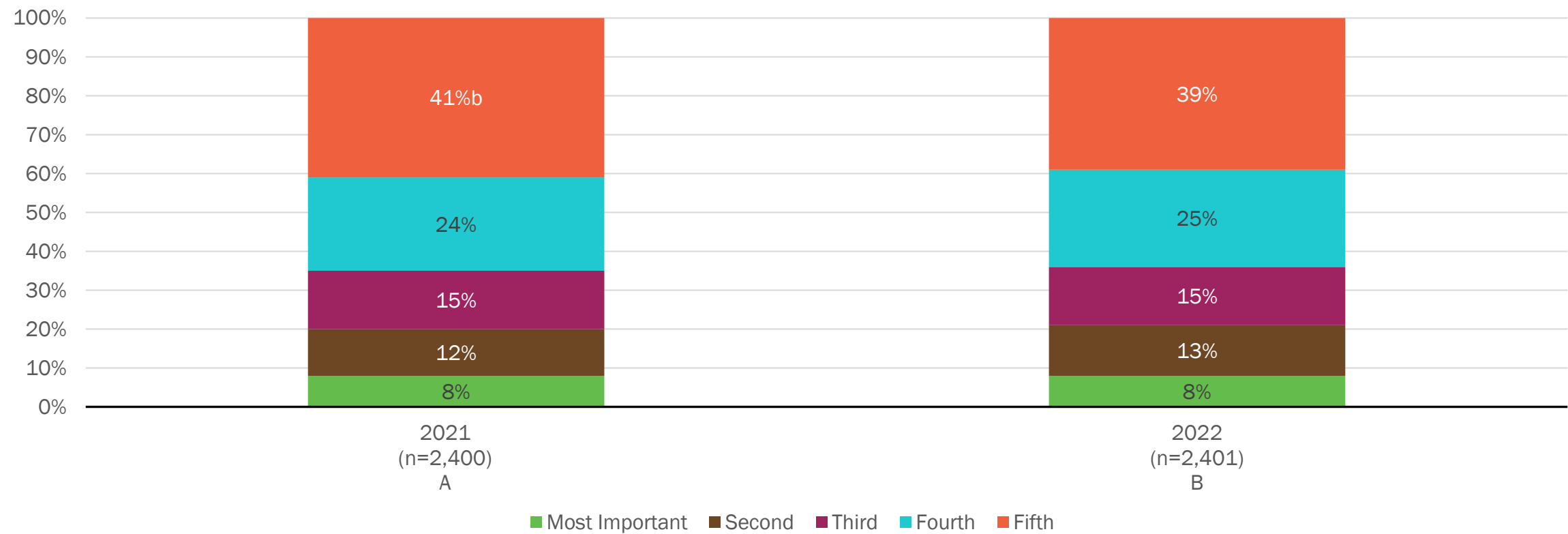
Taste and health benefits of avocados dominate overall. Sustainably grown is least important.



Importance Ranking of Sustainably Grown

(Total Sample)

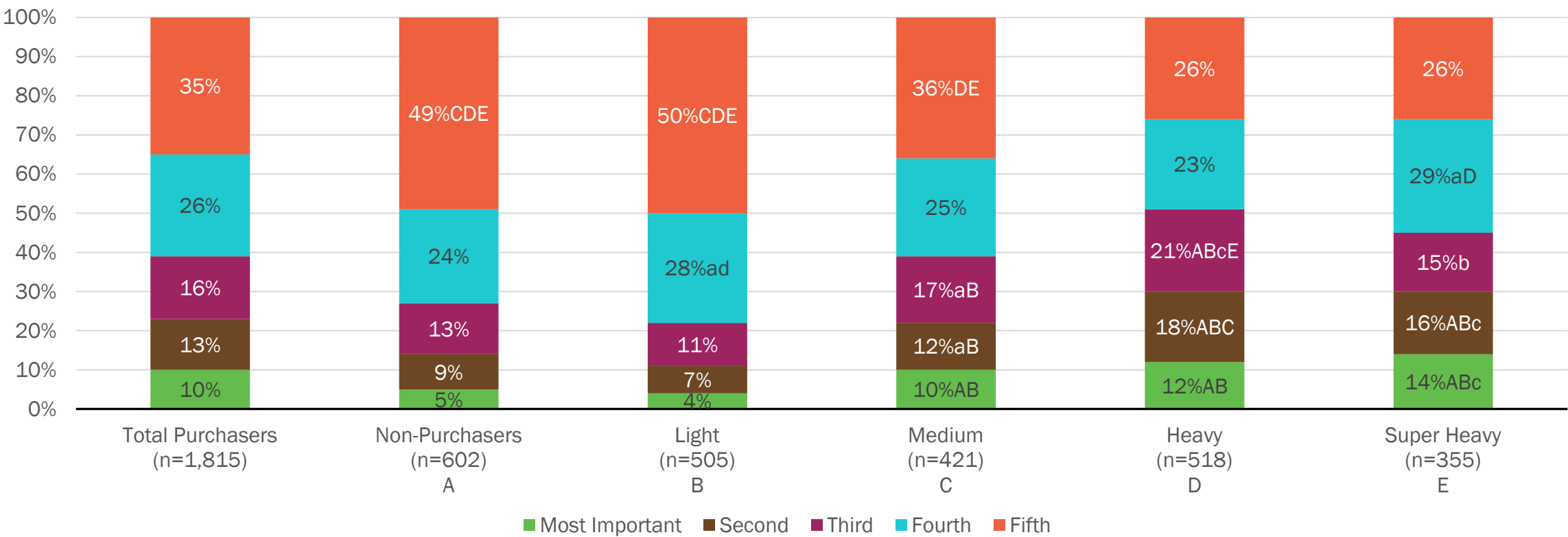
The importance of avocados being sustainably grown is similar to 2021.



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

Importance Ranking of Sustainably Grown

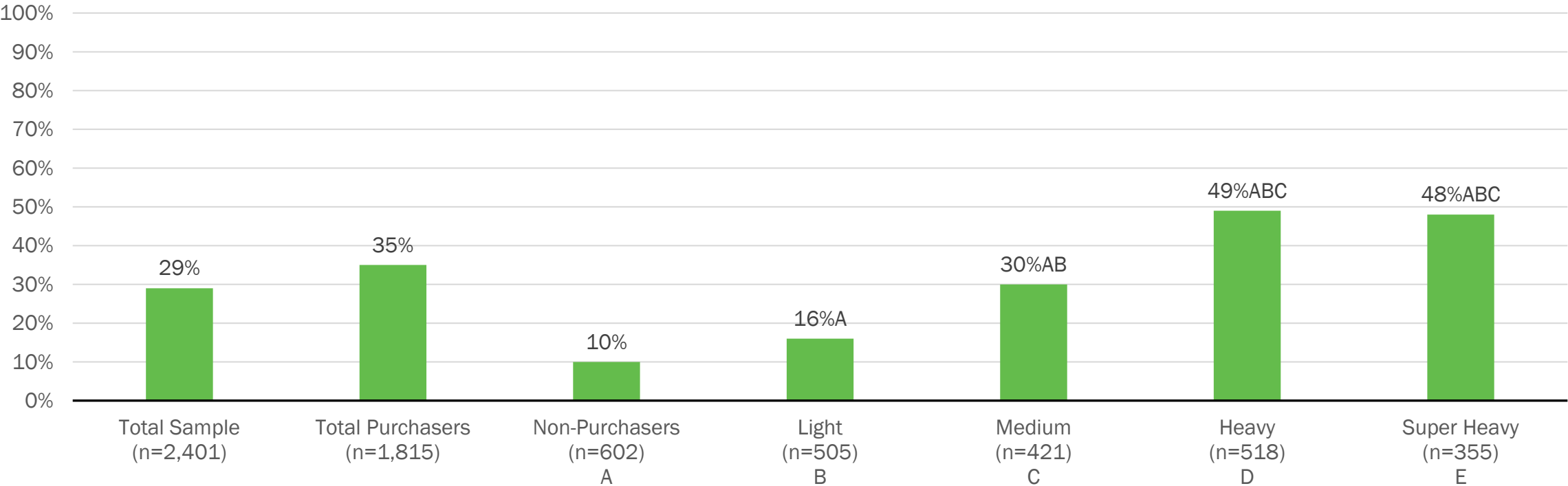
While still low, the importance of avocados being sustainably grown increases with increased avocado purchase levels.



Communications

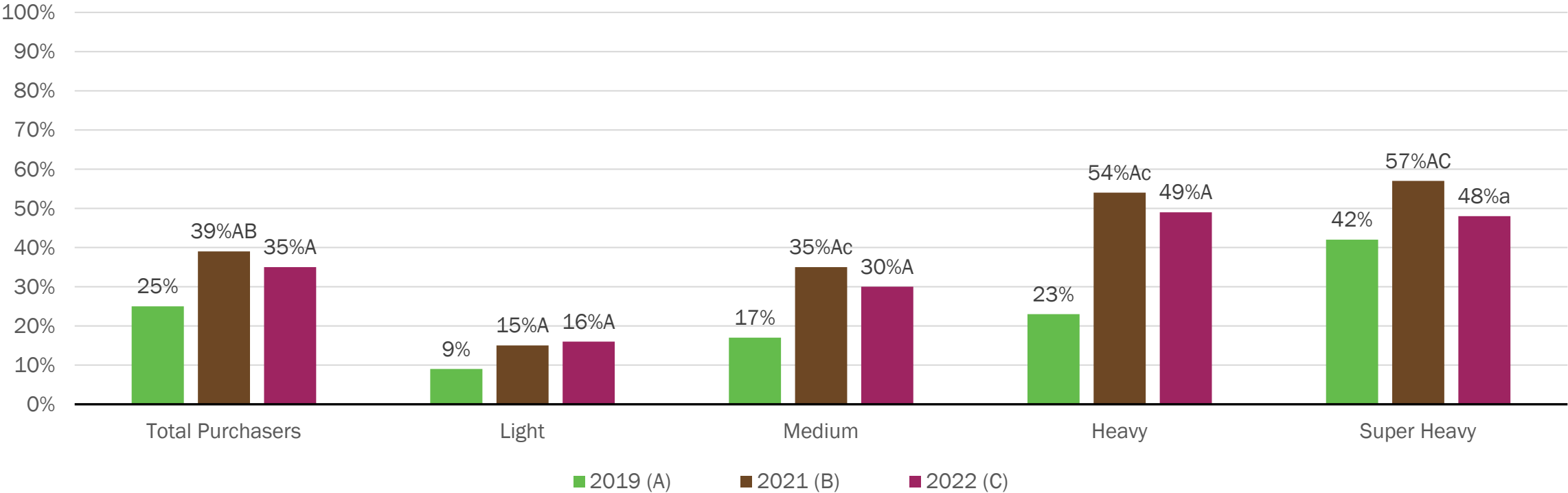
Seen “Love One Today” Logo in Past Year

While there is ample opportunity to grow awareness of the “love one today” logo, it does improve as avocado purchase levels increase (except Heavy and Super Heavy are basically tied).



Seen “Love One Today” Logo in Past Year

We maintained some, but not all of the improved awareness of the “love one today” logo seen last year.



Statements Logo Communicated

(Total Sample)

Messages communicated by the logo have remained fairly consistent over time.



Statements Logo Communicated

(Very Strongly)

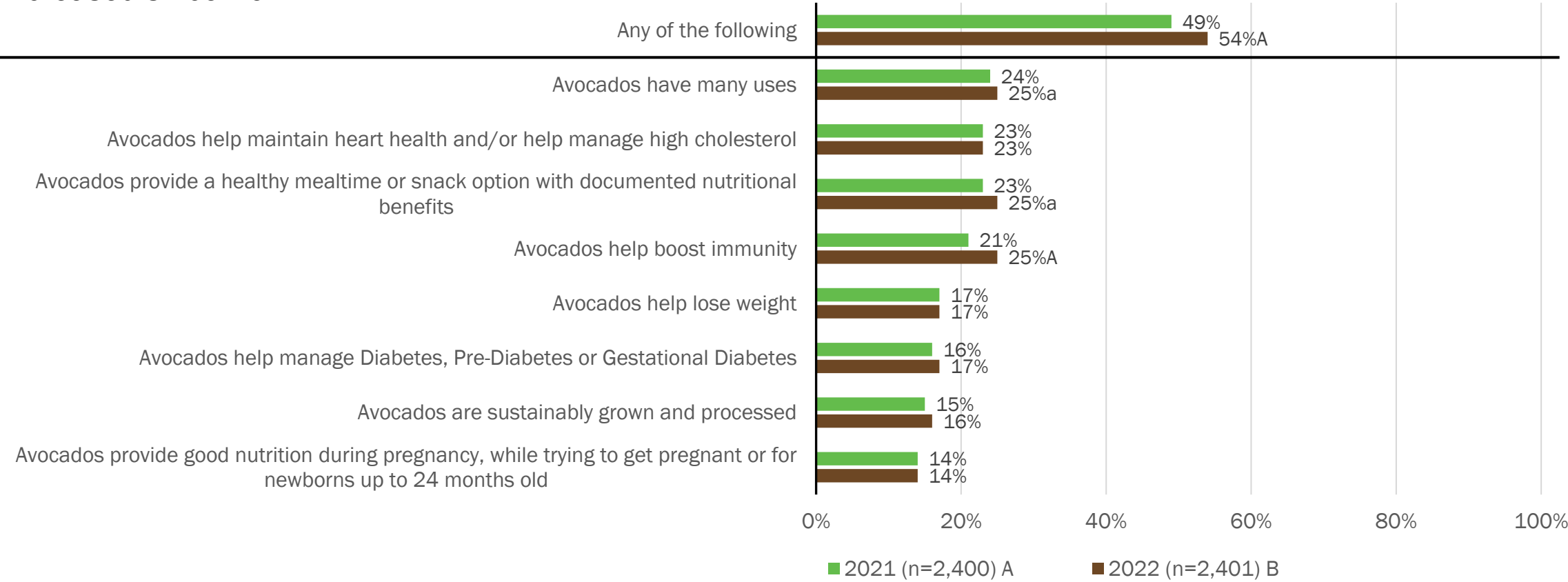
Messages communicated generally increase as avocado purchase levels increase.

	Total Purchasers (n=1,815) %	Non-Purchasers (n=602) % A	Light (n=505) % B	Medium (n=421) % C	Heavy (n=518) % D	Super Heavy (n=355) % E
Avocados are nutritious	60	45	56A	60A	64AB	63AB
You should purchase avocados today	47	30	40A	49AB	50AB	54ABc
You love the way avocados taste	46	19	31A	44AB	54ABC	60ABCd
You should eat an avocado every day	40	19	26A	36AB	48ABC	54ABCd
You should serve avocados to your friends and family today	38	14	23A	35AB	46ABC	52ABCd

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. The recall of messaging around at least one of these benefits has increased since 2021.



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=1,815) %	Non-Purchasers (n=602) % A	Light (n=505) % B	Medium (n=421) % C	Heavy (n=518) % D	Super Heavy (n=355) % E
Any of the following:	63	23	36A	63AB	79ABC	81ABC
Avocados have many uses	30	10	19A	28AB	35ABC	44ABCD
Avocados help boost immunity	30	8	18A	29AB	38ABC	38ABC
Avocados provide a healthy mealtime or snack option with documented nutritional benefits	29	10	18A	27AB	36ABC	39ABC
Avocados help maintain heart health and/or help manage high cholesterol	27	12	15a	29AB	33ABc	32AB
Avocados help manage Diabetes, Pre-Diabetes or Gestational Diabetes	20	5	10A	18AB	26ABC	30ABCd
Avocados are sustainably grown and processed	20	4	10A	17AB	27ABC	26ABC
Avocados help lose weight	19	8	10	19AB	24ABC	28ABC
Avocados provide good nutrition during pregnancy, while trying to get pregnant or for newborns up to 24 months old	17	4	7A	13AB	25ABC	26ABC

Statements About Avocado benefits Seen or Heard in Past Few Months

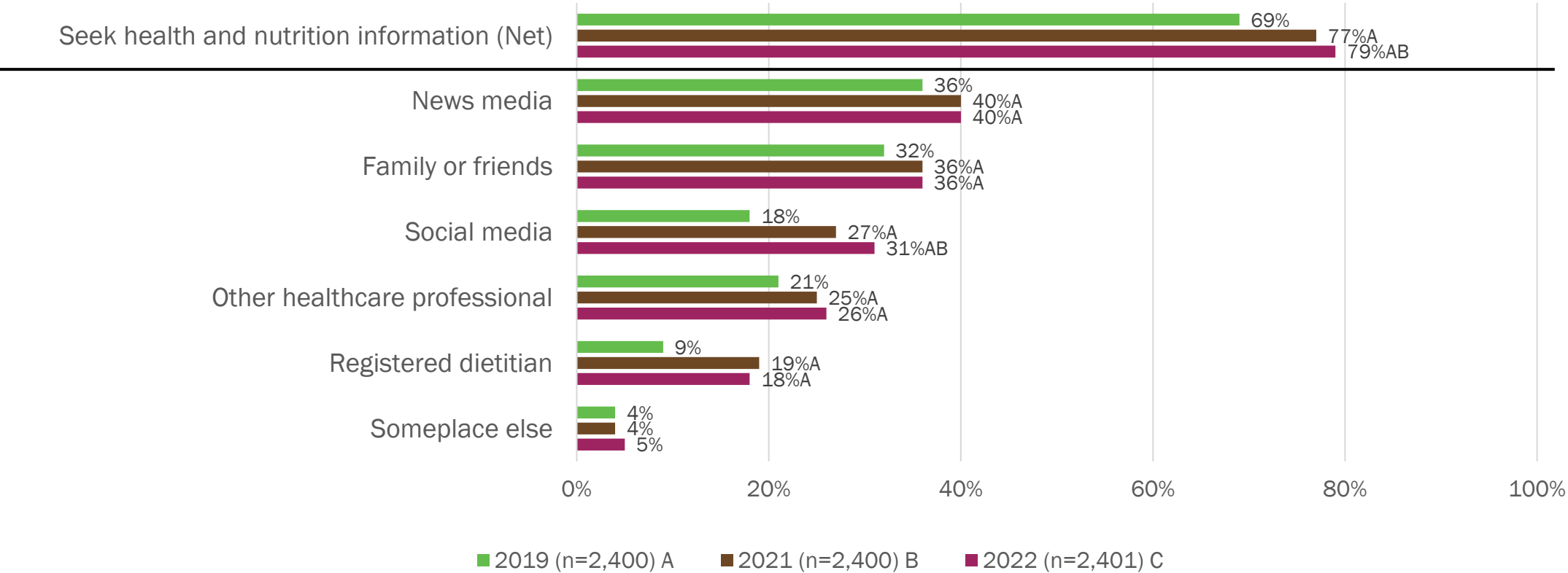
Registered dietitians and social media continue to be the strongest sources of health and nutrition messaging

Health and nutrition information is typically found from:	Registered Dietitian (n=427)	Other Healthcare Professional (n=626)	Social Media (n=751)	News Media (n=966)	Family or Friends (n=854)	Someplace Else (n=117)
	%	%	%	%	%	%
	A	B	C	D	E	F
Any of the following:	86BcDEF	62F	83BDEF	65bF	68BdF	23
Avocados help boost immunity	47BcDEF	31F	43BDEF	33F	35bdF	9
Avocados have many uses	43BDEF	33F	41BDEF	32F	34F	14
Avocados provide a healthy mealtime or snack option with documented nutritional benefits	43BDEF	33F	40BDEF	33F	34F	15
Avocados help maintain heart health and/or help manage high cholesterol	39BDEF	30F	37BDEF	32F	31F	15
Avocados help manage Diabetes, Pre-Diabetes or Gestational Diabetes	37BCDEF	23F	31BDEF	23F	23F	7
Avocados are sustainably grown and processed	34BCDEF	22F	29BDEF	22F	22F	5
Avocados help lose weight	33BDEF	23F	31BDEF	21F	24DF	9
Avocados provide good nutrition during pregnancy, while trying to get pregnant or for newborns up to 24 months old	31BDEF	19F	28BDEF	19F	20F	5

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. Social media is climbing as a source of this information.



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=1,815) %	Non-Purchasers (n=602) % A	Light (n=505) % B	Medium (n=421) % C	Heavy (n=518) % D	Super Heavy (n=355) % E
Seek health and nutrition information (Net)	86	60	77A	85AB	92ABC	92ABC
News media	44	29	37A	41A	48ABC	50ABC
Family or friends	39	26	32A	35A	45ABC	44ABC
Social media	38	10	20A	33AB	50ABC	54ABC
Other healthcare professional	27	23	27a	27a	27a	28a
Registered dietitian	21	8	9	20AB	28ABC	30ABC
Someplace else	5	6DE	9aCDE	4E	3e	2

Amount Of Time Spent Accessing Social Networks On A Weekly Basis

More avocado purchasers than non-purchasers access social media on a weekly basis. This is especially true for heavy and super heavy purchasers.

	Total Purchasers (n=1,815) %	Non- Purchasers (n=602) % A	Light (n=505) % B	Medium (n=421) % C	Heavy (n=518) % D	Super Heavy (n=355) % E
Use Social Networks (Net)	91	77	83A	91AB	96ABC	97ABC
Less than 30 minutes	9	17bCDE	14CDE	10dE	7E	4
31-60 minutes	9	12DE	11DE	13DE	6	6
1-2 hours	11	13de	12	13de	10	10
2-3 hours	13	10	11	15AB	13a	16AB
3-4 hours	12	7	8	11Ab	16ABc	14AB
More than 4 hours	36	18	27A	29A	45ABC	46ABC

Social Media Network Use Most

Facebook dominates as the network used the most. While in a distant second and third place, the use of YouTube and Instagram is higher as avocado purchase levels go up.

	Total Purchasers (n=1,815) %	Non- Purchasers (n=602) % A	Light (n=505) % B	Medium (n=421) % C	Heavy (n=518) % D	Super Heavy (n=355) % E
Facebook	49	57bCDE	51e	49	49	47
YouTube	17	9	13a	19AB	19AB	21AB
Instagram	12	4	7A	10Ab	15ABC	15ABc
Twitter	6	3	4	6Ab	6Ab	6A
Pinterest	3	2	3	4a	4a	3
TikTok	2	1	2ac	1	2c	3AC
LinkedIn	1	1	1	2	1	1
Other	1	<1	2aD	1d	<1	1

Conclusions and Action Steps

Conclusions and Action Steps

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.	
The importance of supporting the immune system, fits into a heart-healthy diet, and fits into my weight-loss diet continues to grow among avocado purchasers. While avocados perform well on these attributes, there is no room for declines.	
Awareness of “Love One Today” is down among heavy and super heavy purchasers. We need to understand if this is an awareness issue or a relevance issue for these purchasers.	
Registered Dietitians and Social Media continue to be strong sources of information about avocados. HAB must continue to nurture these relationships.	



Thank you!

LoveOneToday.com