

Avocados Consumer Tracking 2023: Segment Report

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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 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 (88% 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

2023: March 23rd – April 11th, 2023

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 2023

While most results are similar to 2022, there were some changes:

The proportion of households purchasing avocados has declined (76% to 68%). This is primarily driven by less Heavy purchasers (22% to 15%).

Usage for lunch and breakfast are back up this year after experiencing declines last year – driven by Heavy and Super Heavy purchasers.

Reasons for purchasing avocados had increased in 2021 and 2022, but many of them are down in 2023. Non-purchasers and Light purchasers are driving the declines.

Association of avocados with helping to reduce cancer risk is low – which is logical considering this is a relatively new benefit to promote.

While pesticide concerns are a strong barrier for non-purchasers, it is only a moderate barrier for all purchaser segments.

Awareness of “love one today” is down from 2022 (29% to 23%).

Recall of any messaging around at least one of the benefits of avocados is down from 2022 (54% to 44%).

Purchaser Segments

The proportion of avocado purchasers, which had increased the past two years, experienced a decline. Significant changes for purchaser segments are:

- Non-purchasers are up from 24% to 32%
- Heavy purchasers are down from 22% to 15%
- All other segments are a similar proportion as seen in 2022

The share of avocados (not people) across segments is similar to last year.

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 back up this year after experiencing declines last 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 almost all of the reasons for purchasing avocados has increased since 2019, but is down from 2022.

- 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 almost all are 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, being a source of beneficial fiber, and being naturally low in saturated fats.
- Scores overall are somewhat lower than desired for helping to reduce cancer risk, helping to manage high blood pressure, supports cognitive health and helps reduce inflammation.
- 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, but they do fall short for helping to reduce cancer risk, helping manage blood pressure, and supporting cognitive health.
 - Once you are a Medium purchaser, 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.

As avocado purchase levels increase, the number of barriers decrease. Being too expensive and turning brown too quickly are top barriers for all segments.

Communication

23% of all respondents claim to have seen “Love One Today” within the past year. While this remains higher than the 18% seen in 2019, it is down from 2022 (29%).

- This ranges from a low of 9% among non-purchasers to a high of 49% 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.

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 is down from 2022 (54% to 44%).

The news media and family and friends are the top sources of health and nutrition information. Social media remains in third place.

Purchaser Segment Snapshots

Non-Purchasers: 32% of General Sample (24% last year)

The non-purchaser profile is similar to 2022. The one exception is a large increase in non-users in the 35-44 age group.

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: 22% of General Sample (21% last year)

The Light purchaser profile is similar to 2022. 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.

While they are less committal than seen overall in terms of reasons for purchasing avocados, scores for their top reasons of being healthy, contain “good” fats, like the taste, and like the texture are stronger than seen last year,

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. Avocados do fall short for helping to reduce cancer risk, helping manage blood pressure and supports cognitive health.

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 (17% last year)

The Medium purchaser profile is similar to 2022. The only change is highlighted in red.

They are mostly 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 among Heavy and Super Heavy purchasers 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, education, household income and geographic distribution. Differing from last year, they do skew slightly more toward being employed.

Heavy Purchasers: 15% of General Sample (22% last year)

The Heavy purchaser profile saw many changes compared to 2022. These are highlighted in red.

While about half of them are regular avocado purchasers, **the rest of them are split between special occasion and occasional purchases.**

They use avocados for more meal occasions than average, but generally fall somewhat below Super Heavy purchasers. **We did see increases in using avocados for breakfast, lunch, and dinner; reversing the decreases seen last year for breakfast and lunch.** 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 agree that all of the health and nutrition attributes are important **except being non-GMO and supporting a prenatal diet.**

- 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, turning brown too quickly, **being perishable, inconsistent quality and not being at the desired ripeness level (these last three bounced back from being moderate barriers last year).**

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 have a slight geographic skew to the west.**

Super Heavy Purchasers: 14% of General Sample (15% last year)

The Super Heavy purchaser profile is similar to 2022. A few changes are highlighted in red.

They are mostly regular avocado 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 an increase in the proportion using avocados for breakfast, lunch and dinner; reversing the decreases seen last year for breakfast and lunch.** They frequently use avocados in more ways than seen for all other segments. Virtually all 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.

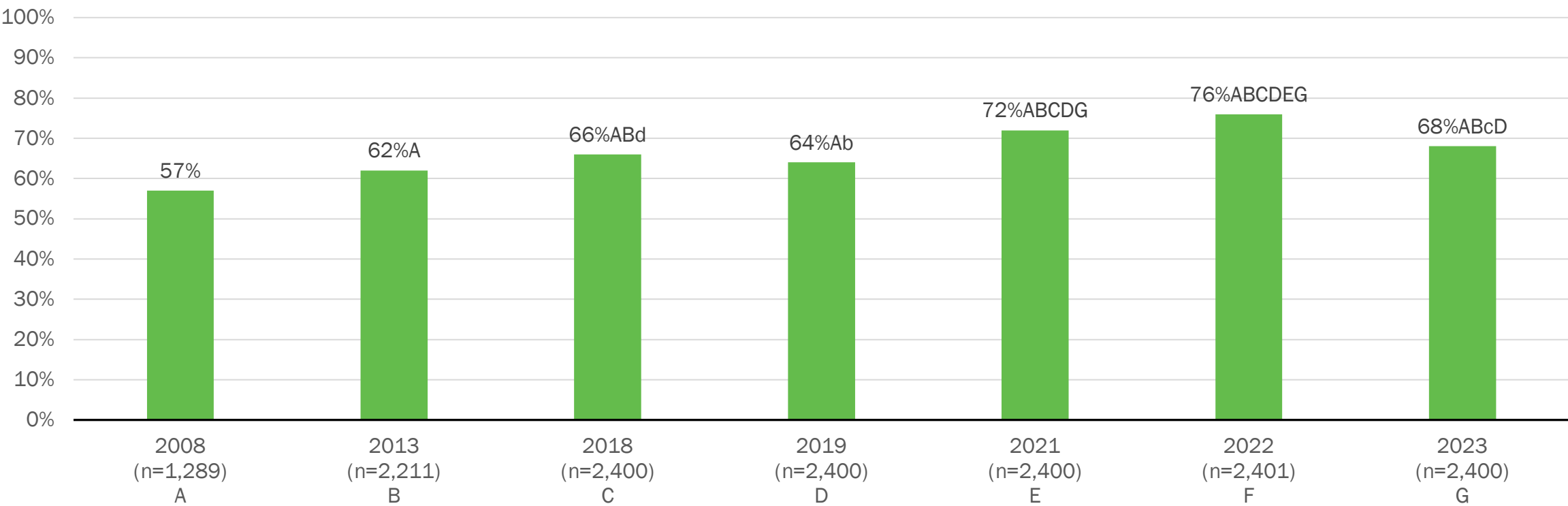
The top barrier to purchasing avocados are being too expensive, **turning brown too quickly and being perishable (these last two bounced back from being moderate last year).**

Super Heavy purchasers have a strong skew toward ages 25-44. Along with Heavy purchasers, they have a slight Hispanic skew. They have the largest households of all segments and are most likely to have children in the home. They are the most likely segment to be employed full-time and they have the 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 is down somewhat after a record high in 2022.



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

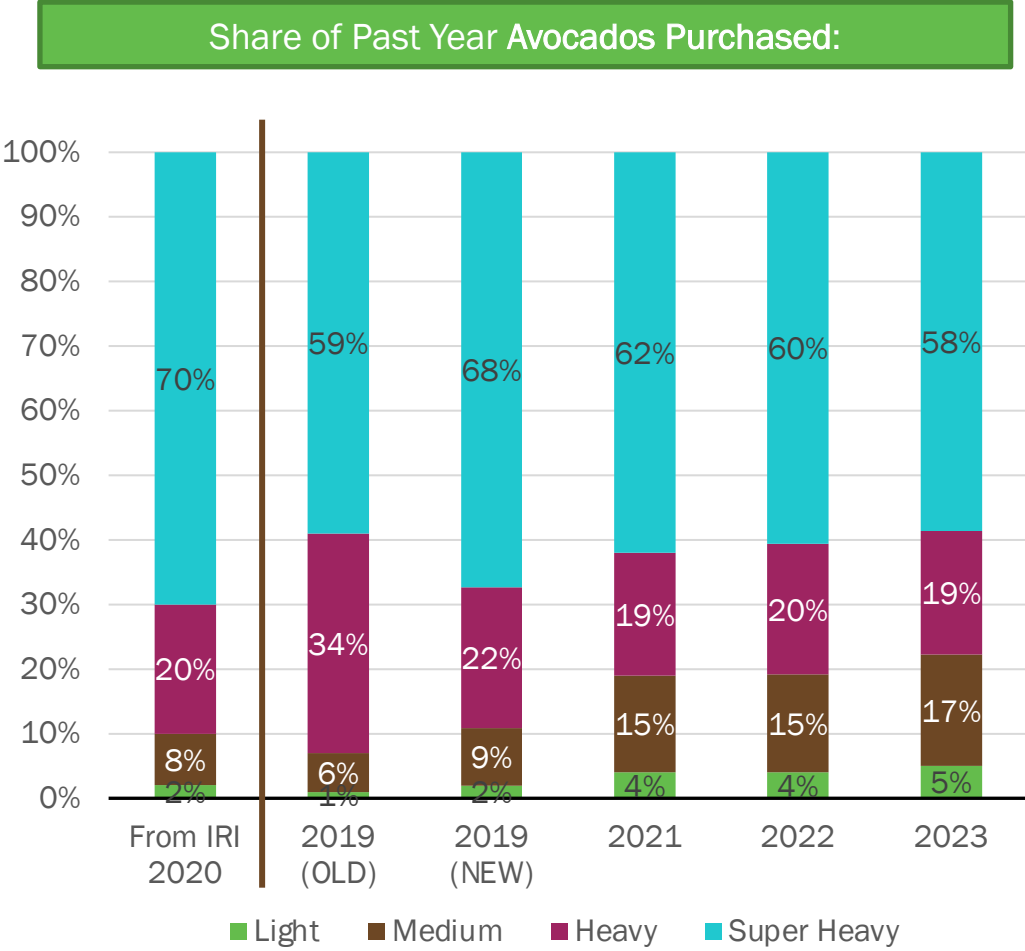
Q110 – Now, please think just about the avocados you have bought to eat or serve at home or to take to work or school in a snack or meal.
When was the last time you bought avocados to eat or serve at home, work or school?

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 and 2023.

Avocado purchase segments (not people) are similar to recent years.



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?

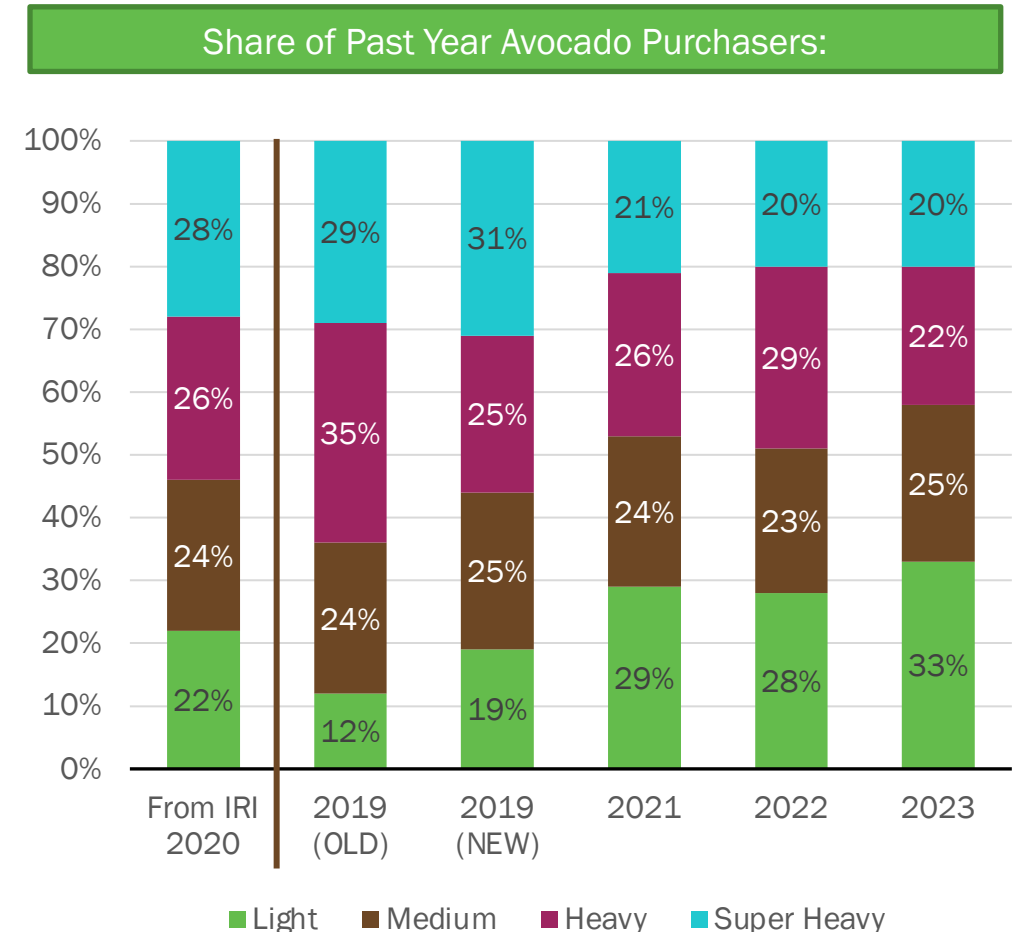
Avocado Segment Composition (People not avocados)

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.

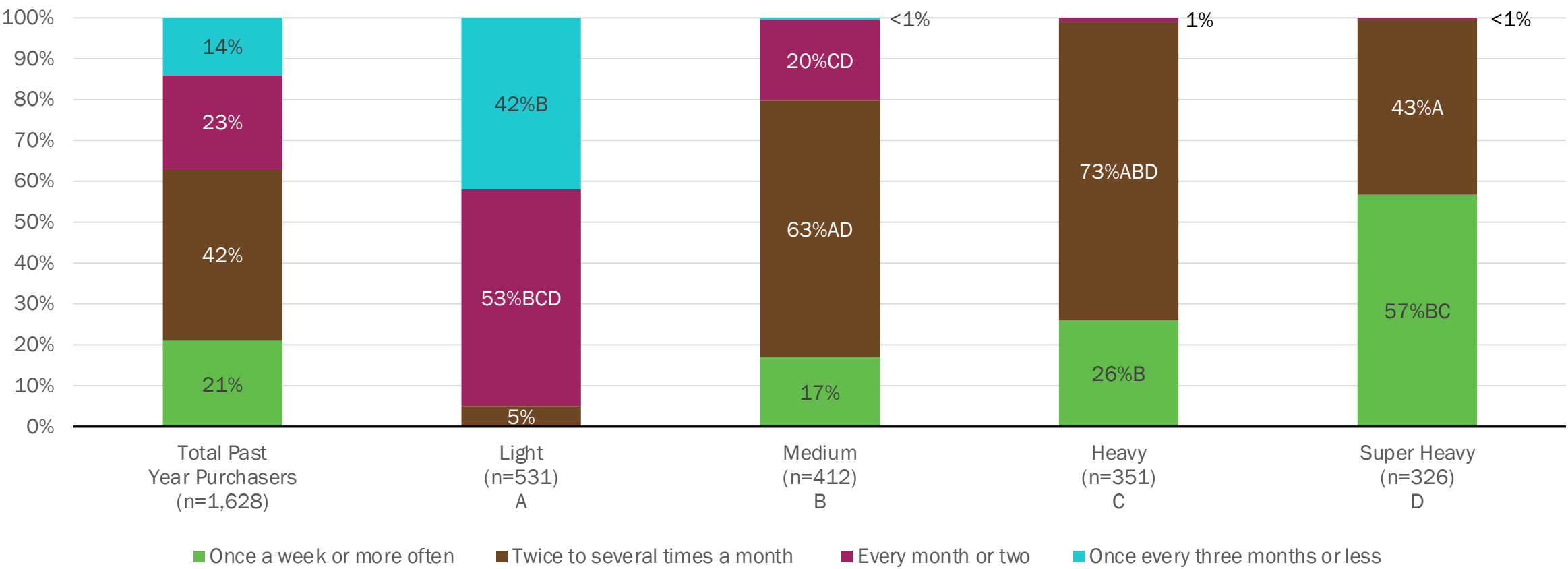
Likely driven by covid, we saw increased avocado purchase for home use in 2020/2021. the increased purchase was seen across segments, but it was proportionally stronger among Light and Medium purchasers (smaller purchase quantities can see larger proportional increases than larger purchase quantities).

This year, while Super Heavy purchasers are in line with recent years, we are seeing less Heavy purchasers and more Medium and Light purchasers.



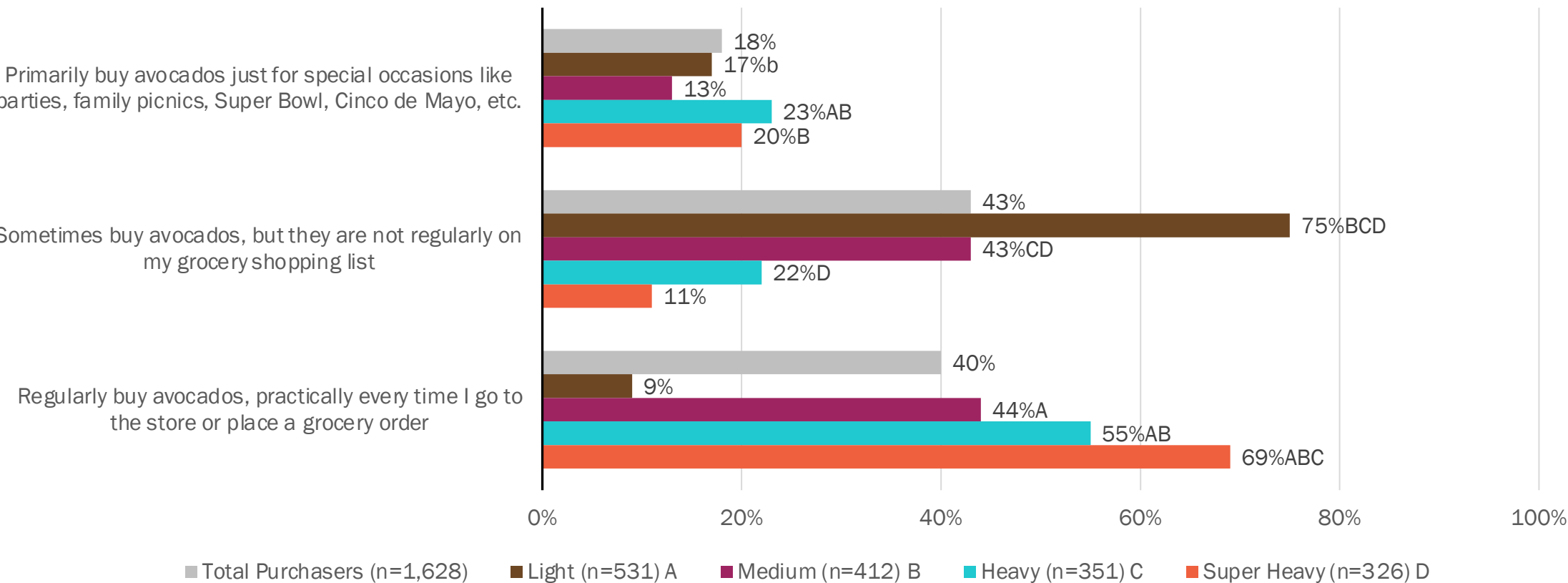
Frequency Of Buying Avocados To Eat Or Serve At Home

As seen before, there is strong correlation with total avocado purchases and frequency of purchasing. For example, well over one-half of Super Heavy purchasers buy avocados every week or more often.



Avocado Purchase Pattern

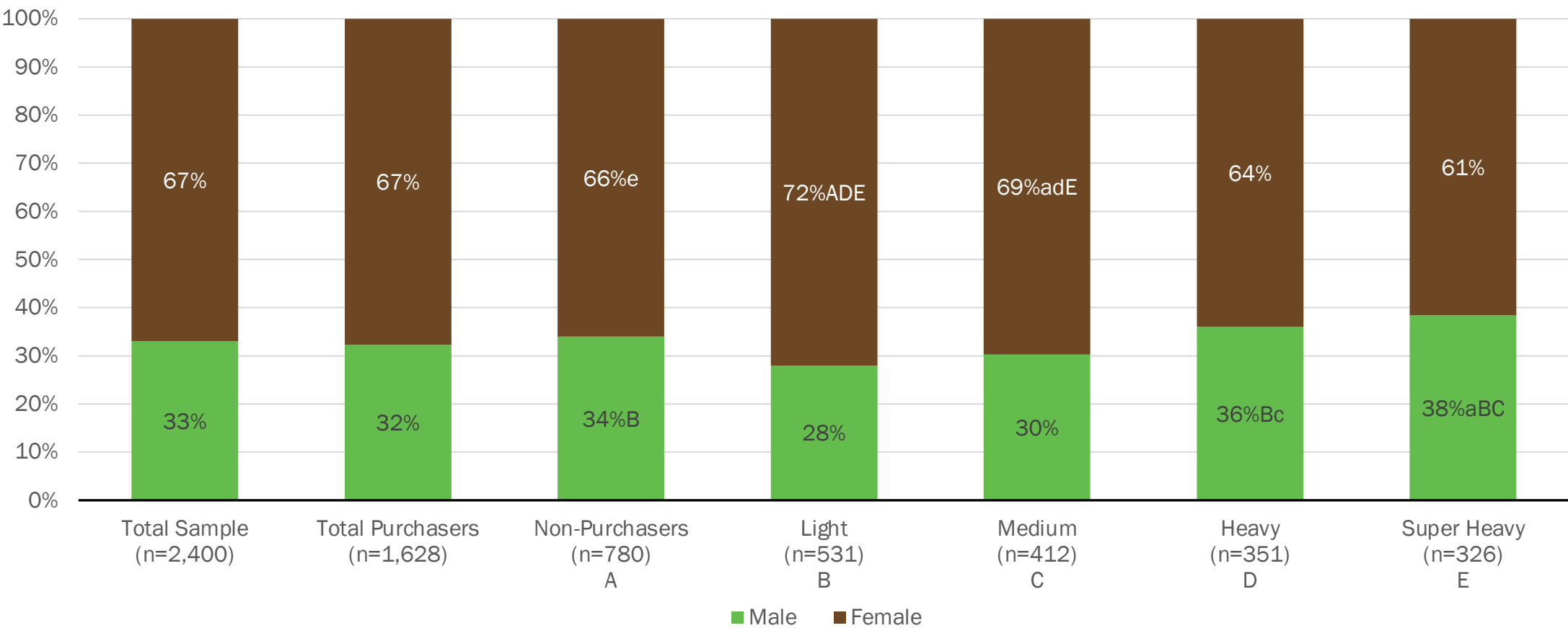
A large portion of avocado purchasers, including Heavy and Super purchasers, are primarily special occasion purchasers. Light purchasers are predominately occasional (not special occasion) purchasers



Profile of Purchaser Segments

Gender

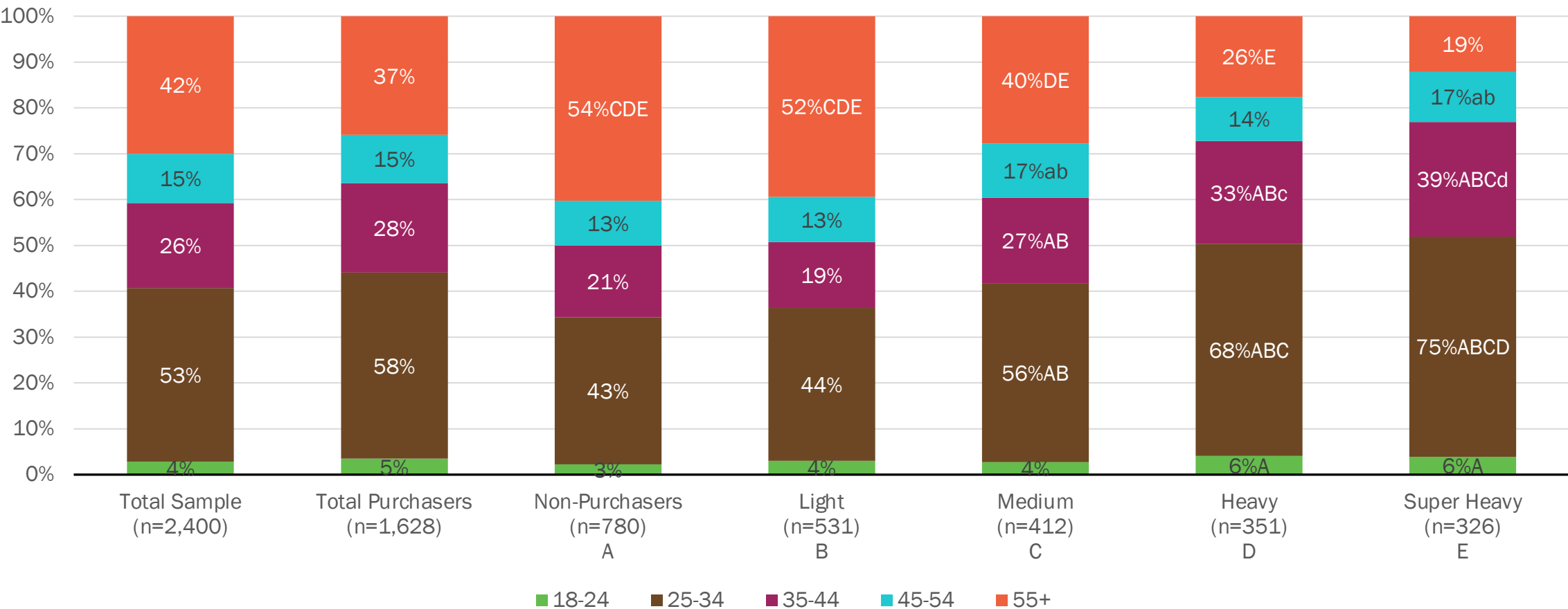
As frequently seen, Heavy and Super Heavy purchasers have somewhat of a male skew.



Profile of Purchaser Segments

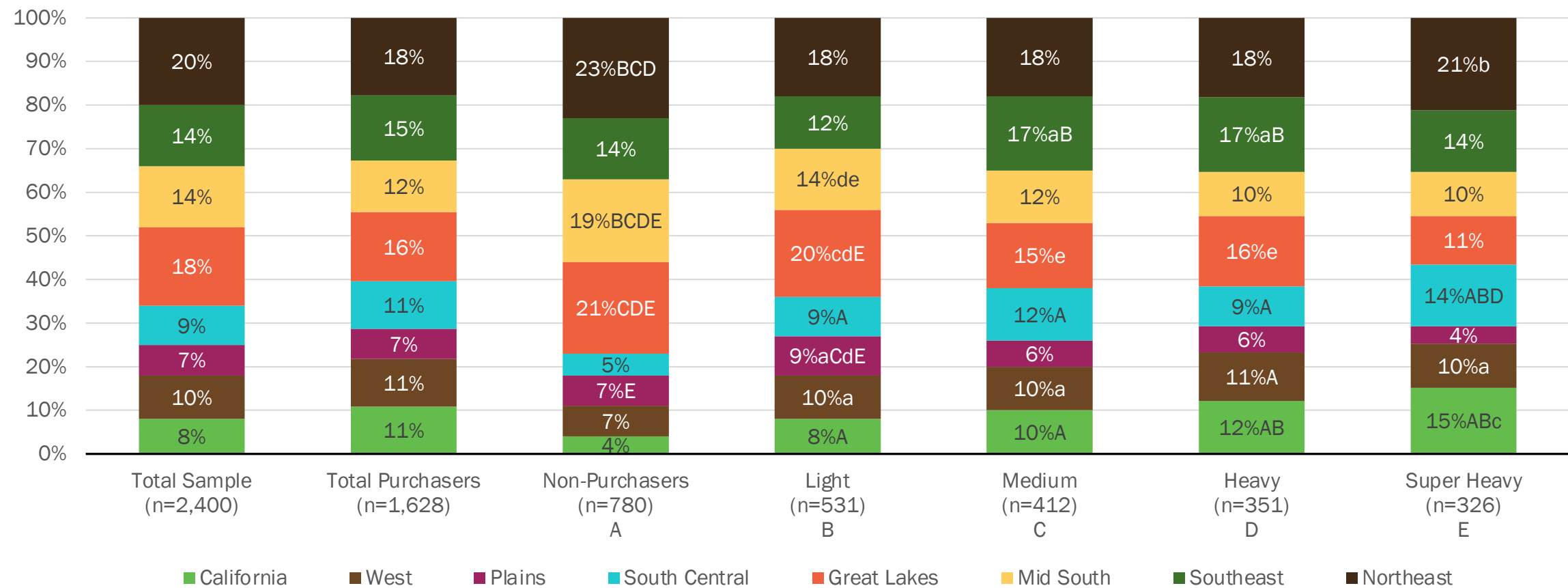
Age

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

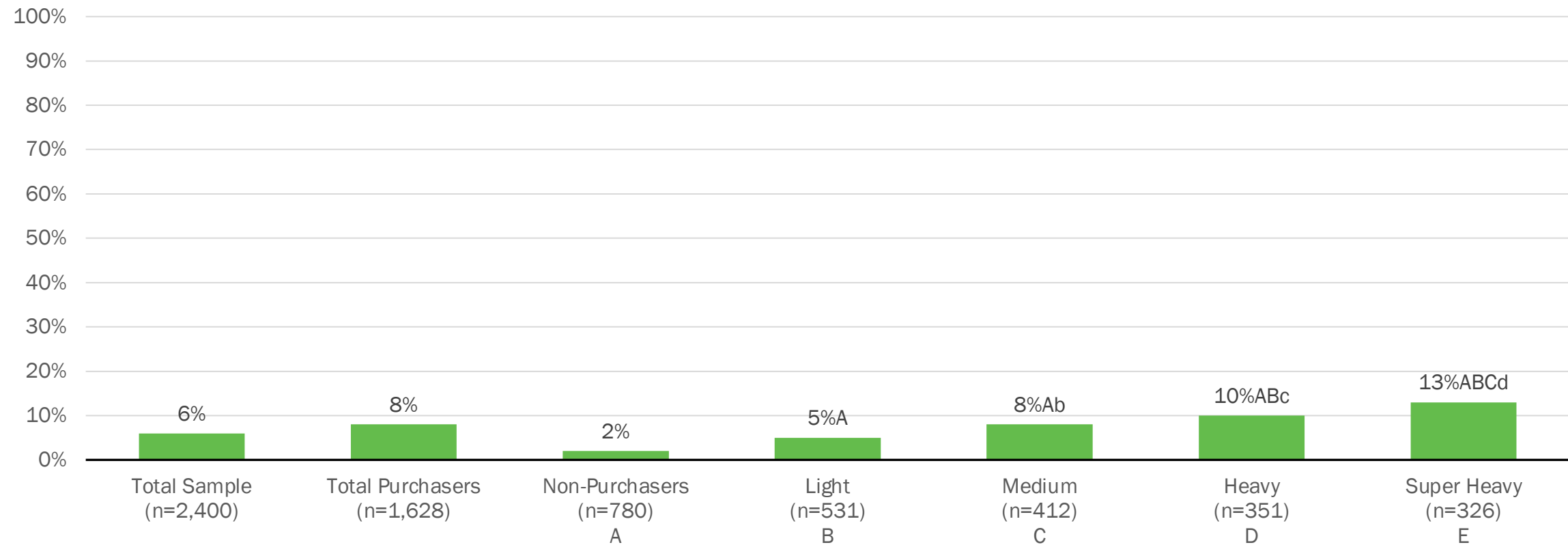
This is minor geographic skew across purchaser segments. Most notably, non-purchasers skew away from CA and the west.



Of Hispanic Origin

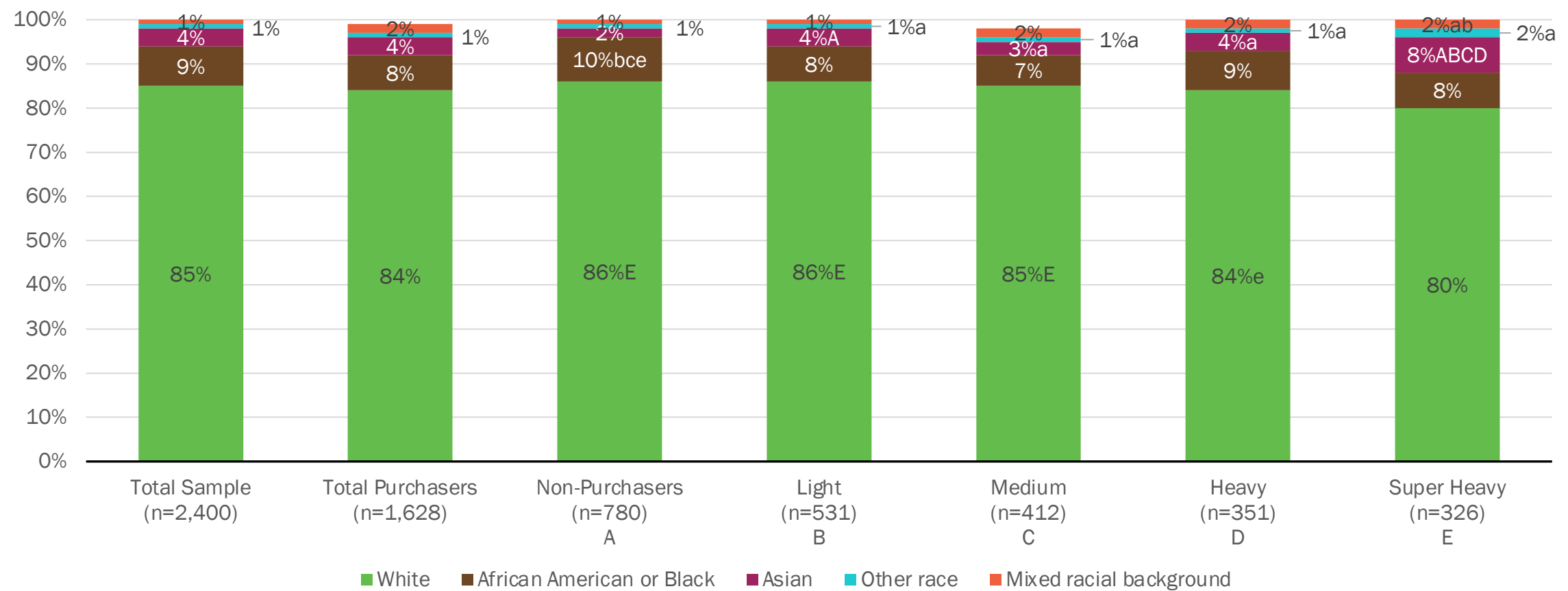
(General Survey in English Only)

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



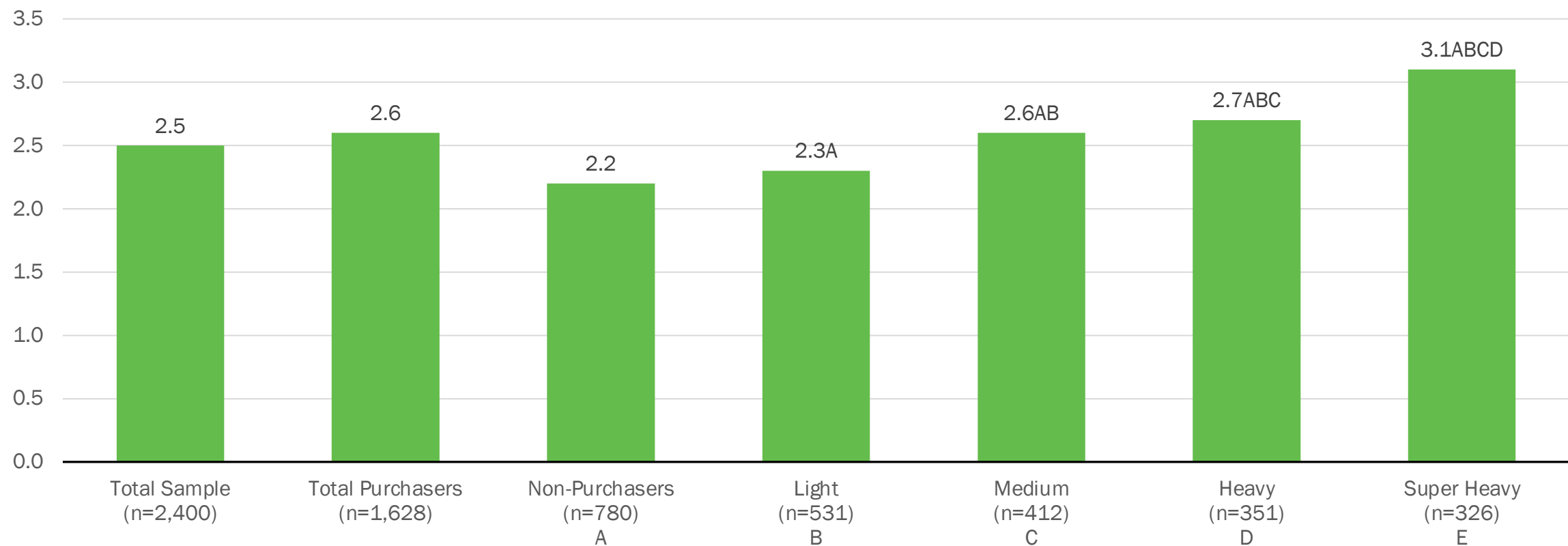
Race

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



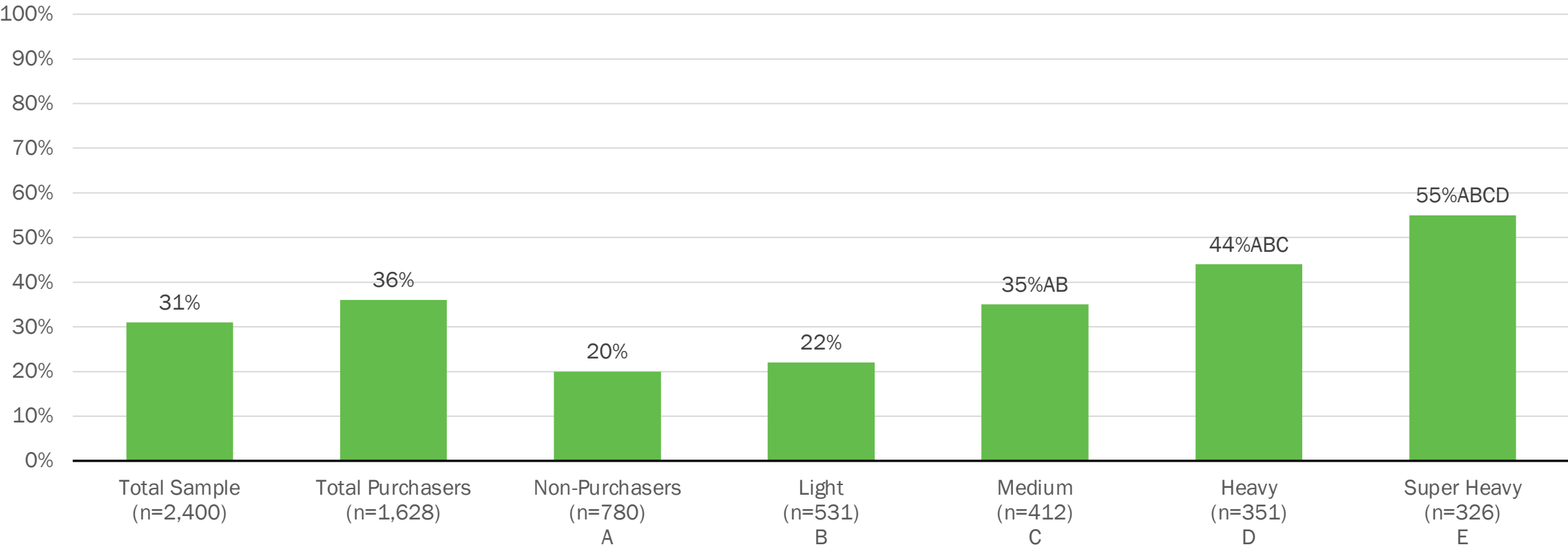
Average Number of People In Household

As seen before, household size increases as avocado consumption increases.



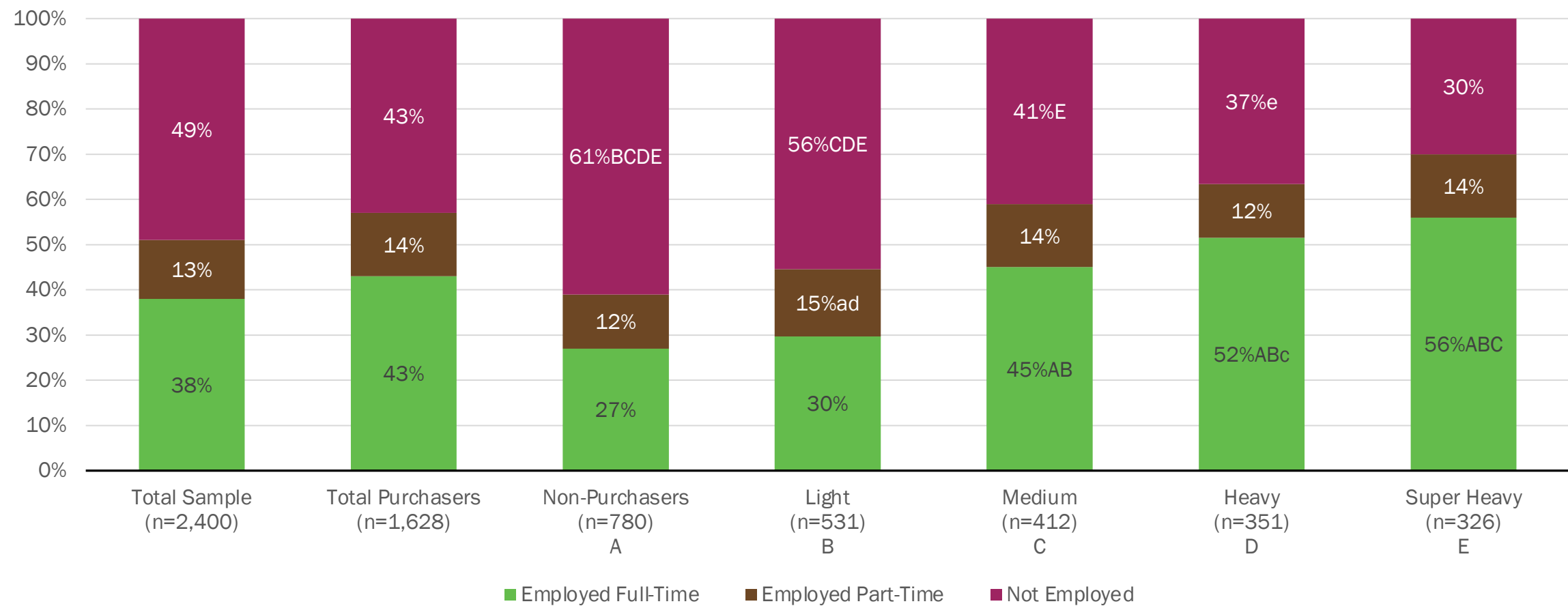
Children Under 18 Living in Household

As seen before, The presence of children in the household increases as avocado usage increases.



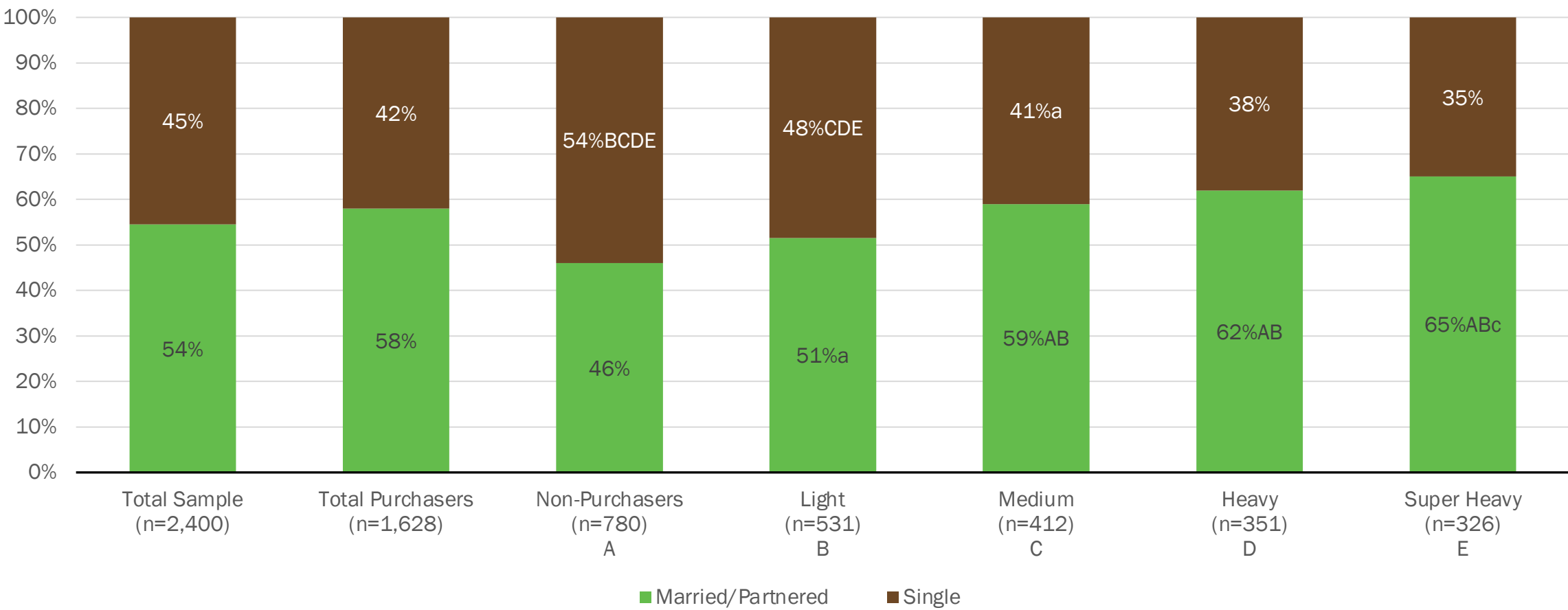
Employment Status

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



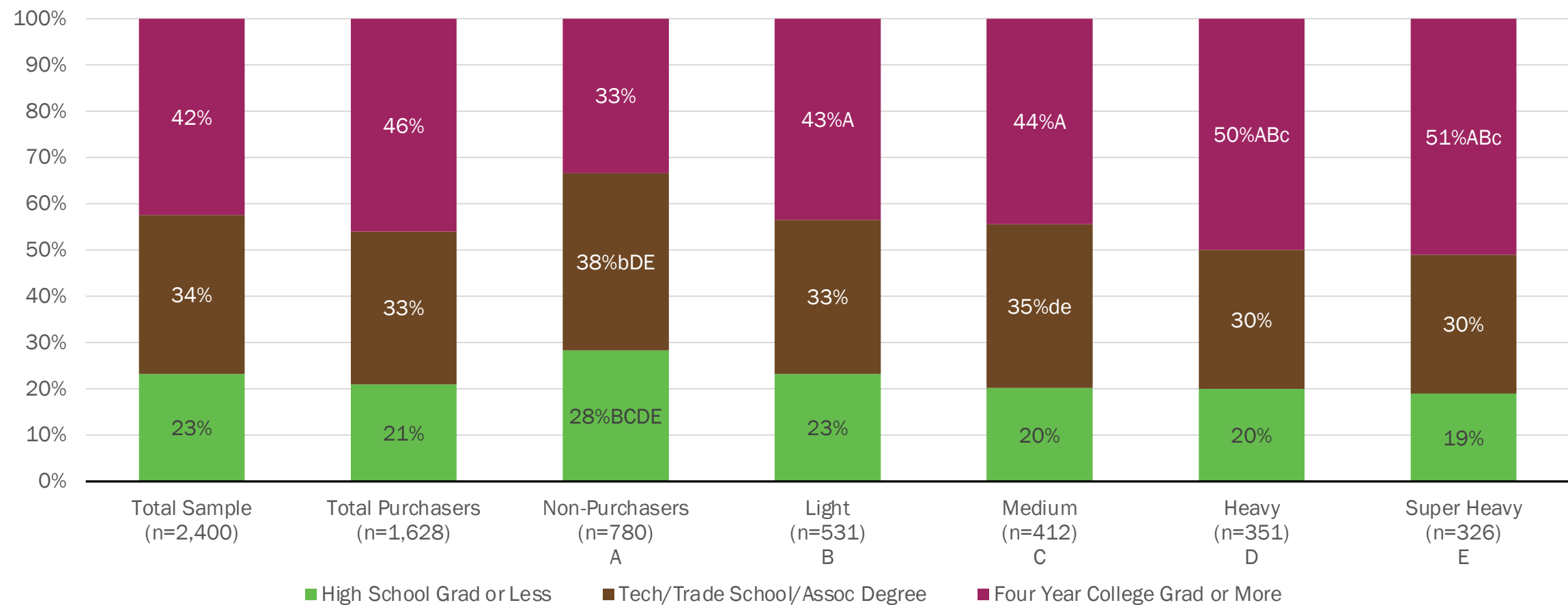
Marital Status

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



Education Level

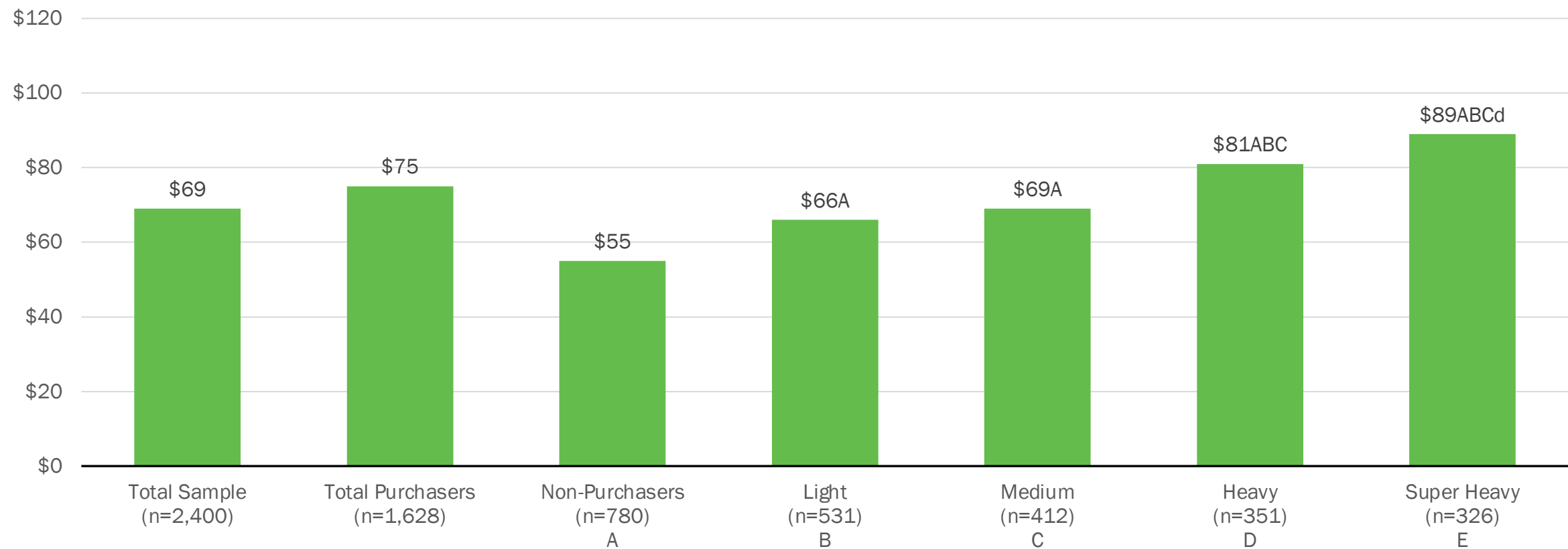
As seen before, educational level increases as avocado usage increases.



Total Average Annual Household Income

(in 000's)

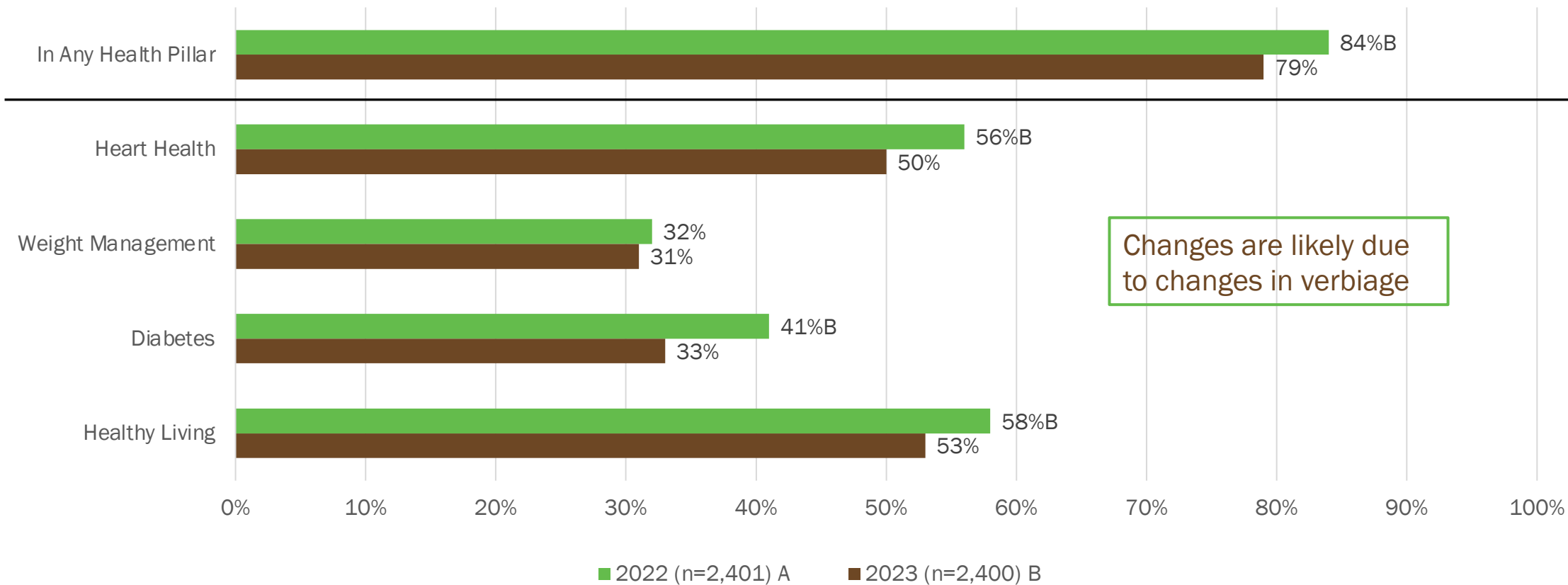
As seen before, household income increases as avocado usage increases.



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

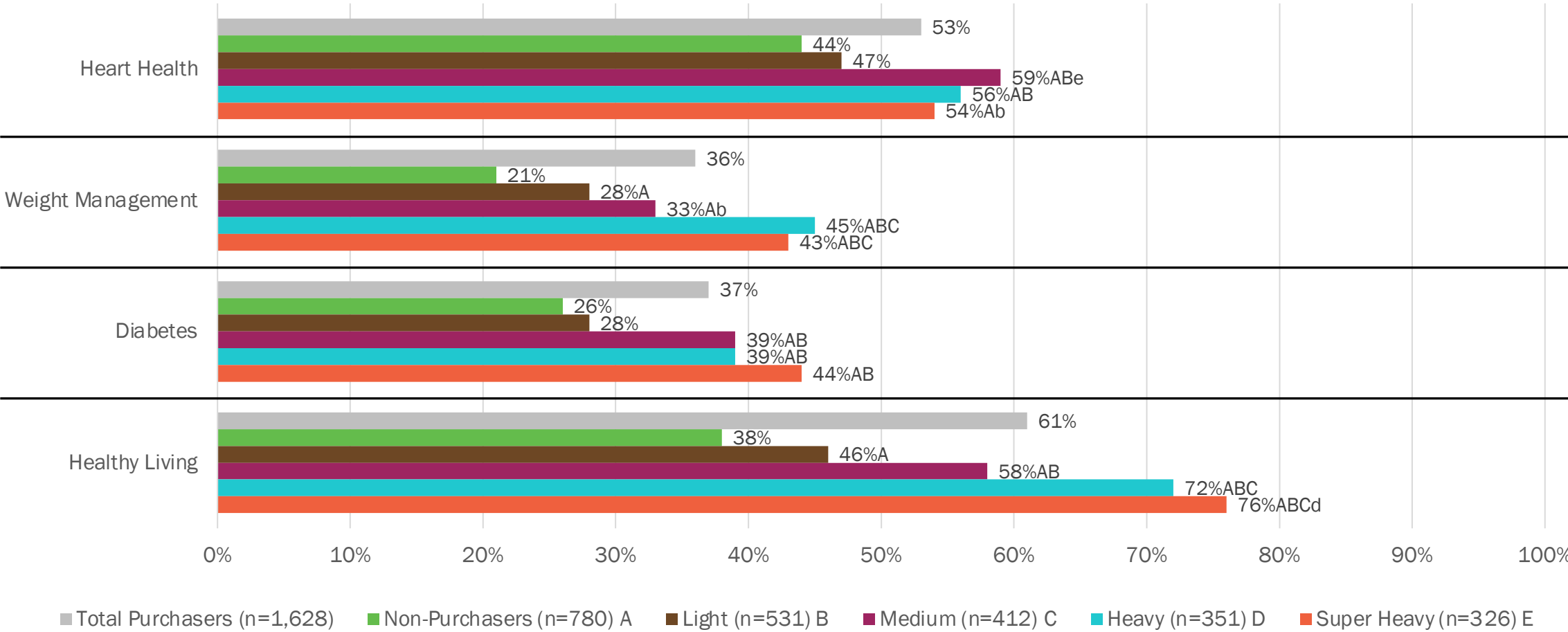
Health And Wellness Pillars (Total Sample)

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.

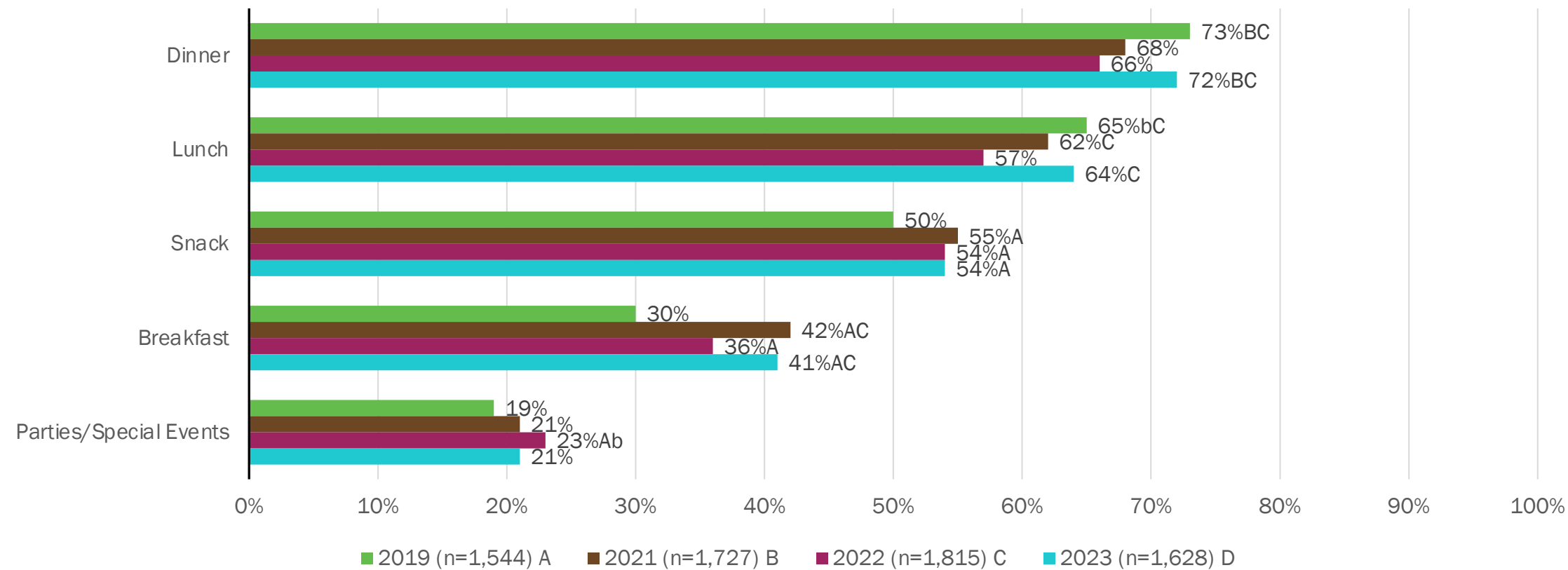


Avocado Usage

Meal Occasions Household Typically Use Avocados

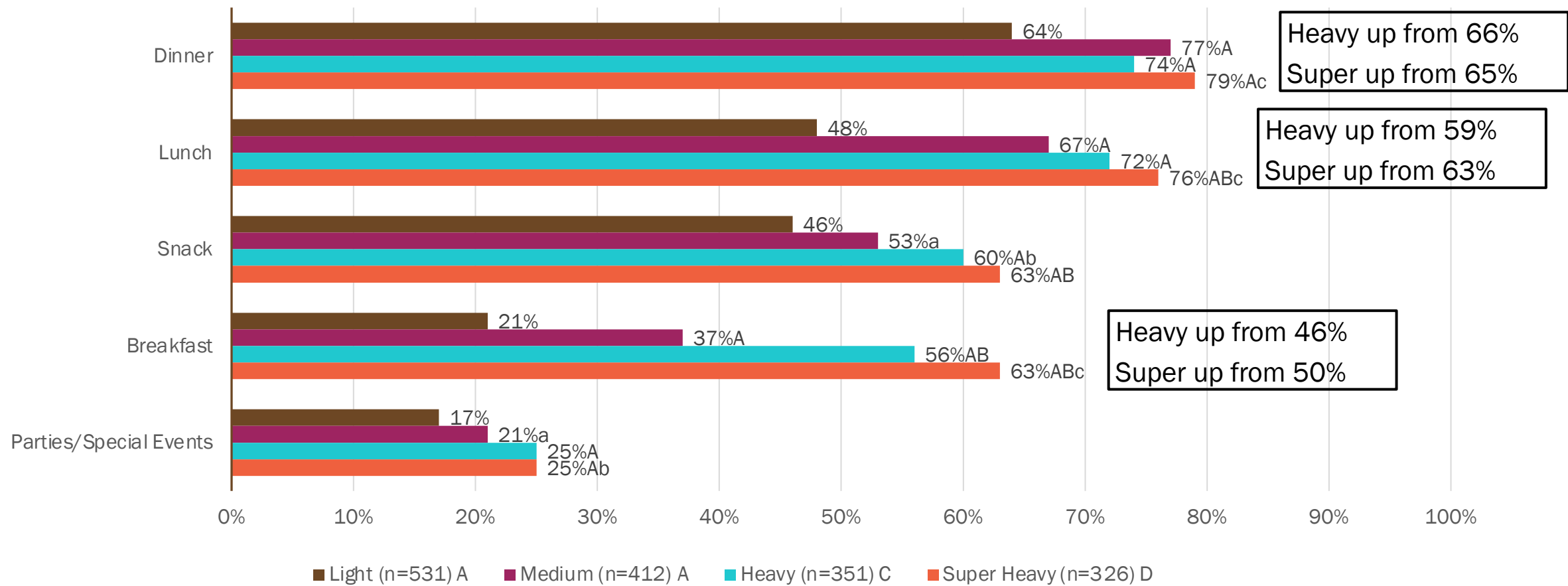
(Total Past Year Avocado Purchasers)

While avocados are used across a variety of meal occasions, dinner and lunch are most common. There has been a rebound for the meal occasions where we saw a decrease last year.



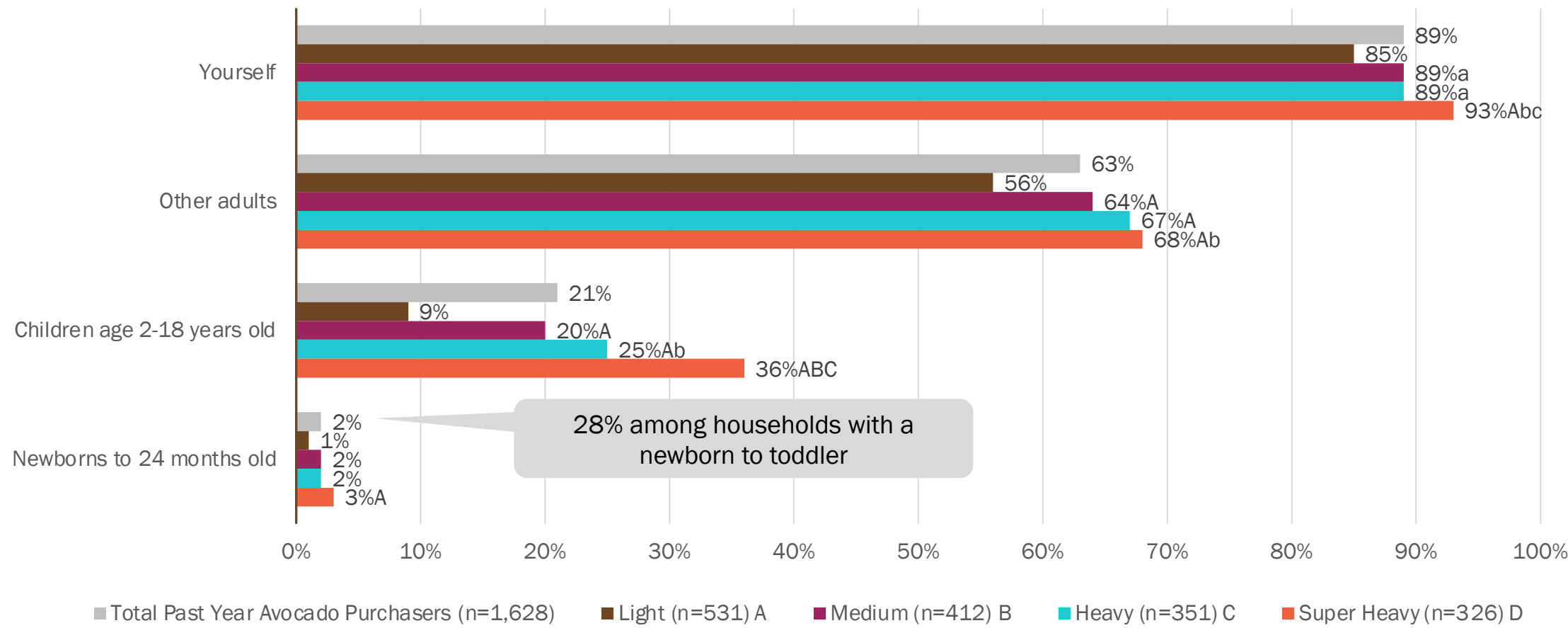
Meal Occasions Household Typically Use Avocados

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



Household Members Consuming Avocados

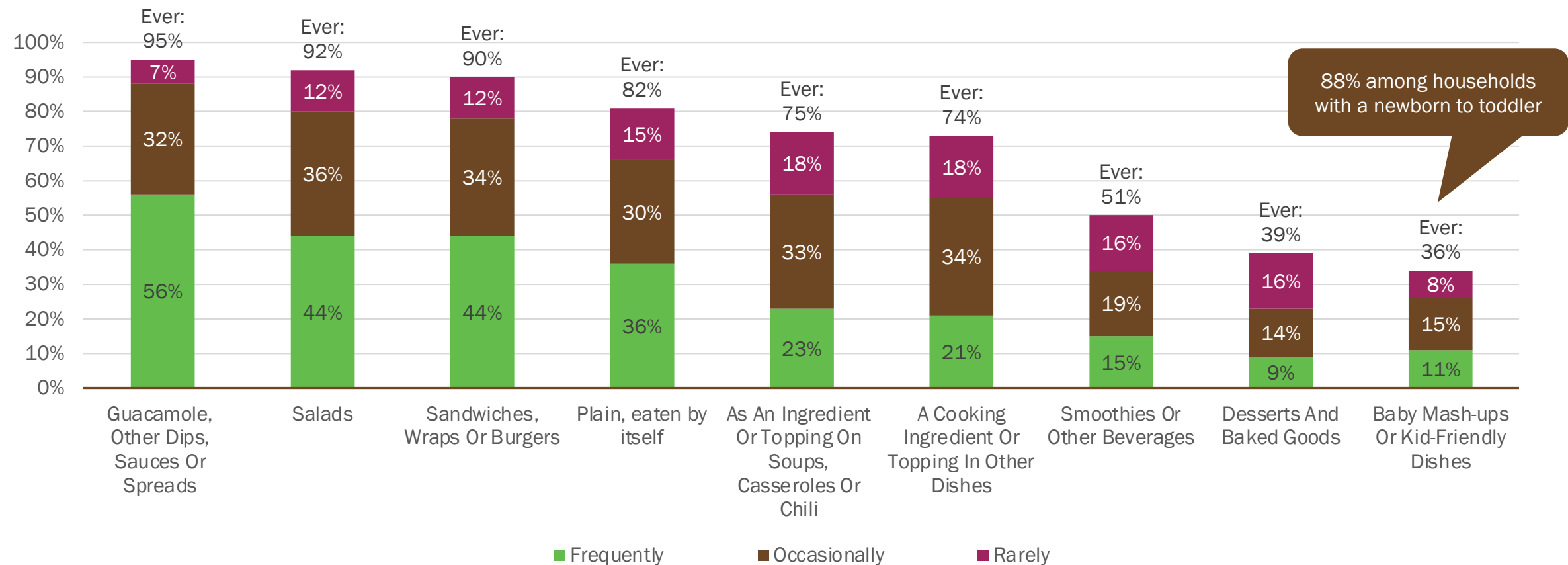
Avocado consumption is generally higher among other household members for Super Heavy purchasers.



How Avocados Are Consumed

(Total Past Year Avocado Purchasers)

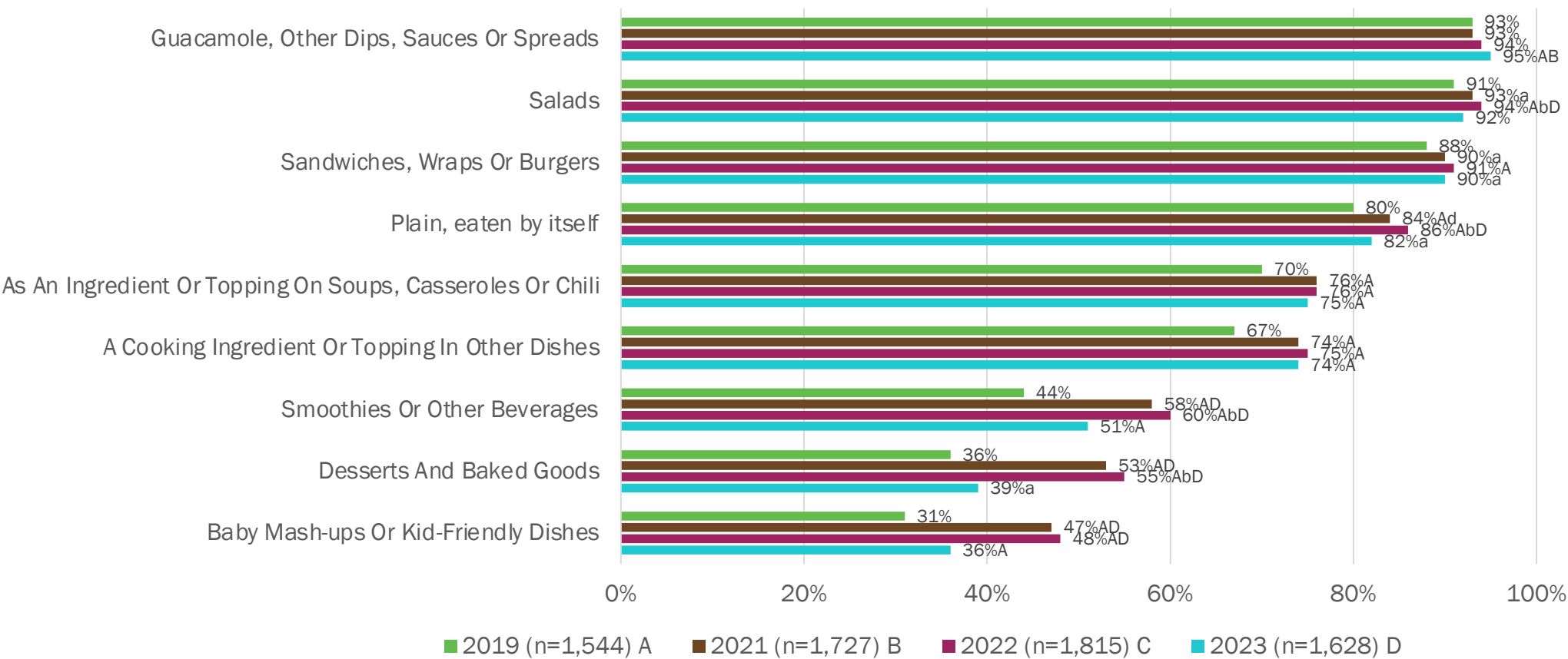
Guacamole/dips, salads and sandwiches/wraps/burgers remain the most common ways of using avocados.



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 over time in using avocados across all other ways. There was a noticeable drop this year for smoothies/beverages, desserts/baked goods and baby mash-ups.



Ways Ever Consumed Avocados

As avocado usage goes up, the ways avocados are ever used also increases.

	Light (n=531) % A	Medium (n=412) % B	Heavy (n=351) % C	Super Heavy (n=326) % D
In guacamole, other dips, sauces or spreads	92	95a	98AB	97Ab
In salads	86	94A	95A	97Ab
On sandwiches, wraps or burgers	82	91A	95AB	97AB
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	68	85A	90AB	94ABc
As a cooking ingredient or topping in dishes other than those listed above	60	74A	83AB	89ABC
As an ingredient or topping on soups, casseroles or chili	59	78A	83Ab	90ABC
In smoothies or other beverages	30	49A	63AB	75ABC
In desserts and baked goods, such as puddings and cakes	21	35A	52AB	61ABC
In baby mash-ups or kid- friendly dishes	17	34A	46AB	56ABC

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=531) % A	Medium (n=412) % B	Heavy (n=351) % C	Super Heavy (n=326) % D
In guacamole, other dips, sauces or spreads	45	60A	60A	65Ab
In salads	22	48A	58AB	61AB
On sandwiches, wraps or burgers	21	43A	57AB	68ABC
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	21	35A	46AB	55ABC
As a cooking ingredient or topping in dishes other than those listed above	10	15A	27AB	40ABC
As an ingredient or topping on soups, casseroles or chili	8	20A	36AB	38AB
In smoothies or other beverages	5	10A	24AB	28AB
In baby mash-ups or kid- friendly dishes	3	10A	16AB	21ABc
In desserts and baked goods, such as puddings and cakes	3	7A	12AB	16ABc

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=531) % A	Medium (n=412) % B	Heavy (n=351) % C	Super Heavy (n=326) % D
In guacamole, other dips, sauces or spreads	82	88A	92Ab	90A
In salads	65	83A	91ABd	88AB
On sandwiches, wraps or burgers	63	79A	89AB	91AB
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	49	66A	78AB	86ABC
As a cooking ingredient or topping in dishes other than those listed above	37	52A	65AB	75ABC
As an ingredient or topping on soups, casseroles or chili	34	58A	70AB	75ABc
In smoothies or other beverages	17	28A	48AB	54ABc
In baby mash-ups or kid- friendly dishes	11	26A	36AB	42ABc
In desserts and baked goods, such as puddings and cakes	10	19A	29AB	39ABC

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 most of these reasons for purchasing avocados has increased since 2019, but many of them are down from 2022.

	2019 (n=2,400) % A	2021 (n=2,400) % B	2022 (n=2,401) % C	2023 (n=2,400) % D
I believe avocados are healthy	74	76A	79ABd	77A
I know that avocados contain "good" fats	69	72A	73Ad	71a
I like the taste of avocados	62	66A	70ABD	65A
I like the texture of avocados	56	61Ad	64ABD	59A
Avocados give me a nice break from everyday foods	51	56AD	59ABD	52
Avocados help me provide my family with nutritious meals	51	55AD	57AbD	52
My family loves avocados	49	54AD	57AbD	50
I feel that avocados are a good value for the money	48	56AD	55AD	51a
Avocados are a staple in my household	38	47AD	46AD	40a
I can substitute avocados for other foods/ ingredients	37	44AD	43AD	38
Avocados bring out my creativity in the kitchen	35	43AD	44AD	36
I have many recipes and ways to use avocados	33	43AD	45AD	38A
Avocados are good for my baby or toddler to eat	29	36AD	37AD	29
Avocados are my favorite food	NA	42D	43D	31
My doctor or another health professional recommended I eat avocados	NA	37D	36D	27

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=1,628) %	Non-Purchasers (n=780) % A	Light (n=531) % B	Medium (n=412) % C	Heavy (n=351) % D	Super Heavy (n=326) % E
I believe avocados are healthy	90	50	85A	93AB	93AB	92AB
I know that avocados contain "good" fats	85	42	77A	88AB	90AB	90AB
I like the taste of avocados	85	24	74A	86AB	90ABc	94ABCD
I like the texture of avocados	78	20	62A	80AB	87ABC	90ABCd
Avocados help me provide my family with nutritious meals	70	16	49A	74AB	84ABC	84ABC
Avocados give me a nice break from everyday foods	69	16	54A	72AB	77ABc	81ABC
My family loves avocados	68	14	44A	74AB	81ABC	85ABCd
I feel that avocados are a good value for the money	65	20	46A	68AB	77ABC	79ABC
Avocados are a staple in my household	57	6	21A	61AB	79ABC	87ABCD
I have many recipes and ways to use avocados	53	7	27A	52AB	72ABC	76ABCd
I can substitute avocados for other foods/ ingredients	49	14	30A	51AB	62ABC	64ABC
Avocados bring out my creativity in the kitchen	48	11	26A	48AB	63ABC	70ABCd
Avocados are my favorite food	43	6	20A	40AB	58ABC	69ABCD
Avocados are good for my baby or toddler to eat	36	13	17a	38AB	48ABC	55ABCd
My doctor or another health professional recommended I eat avocados	36	8	17A	36AB	49ABC	53ABC

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.

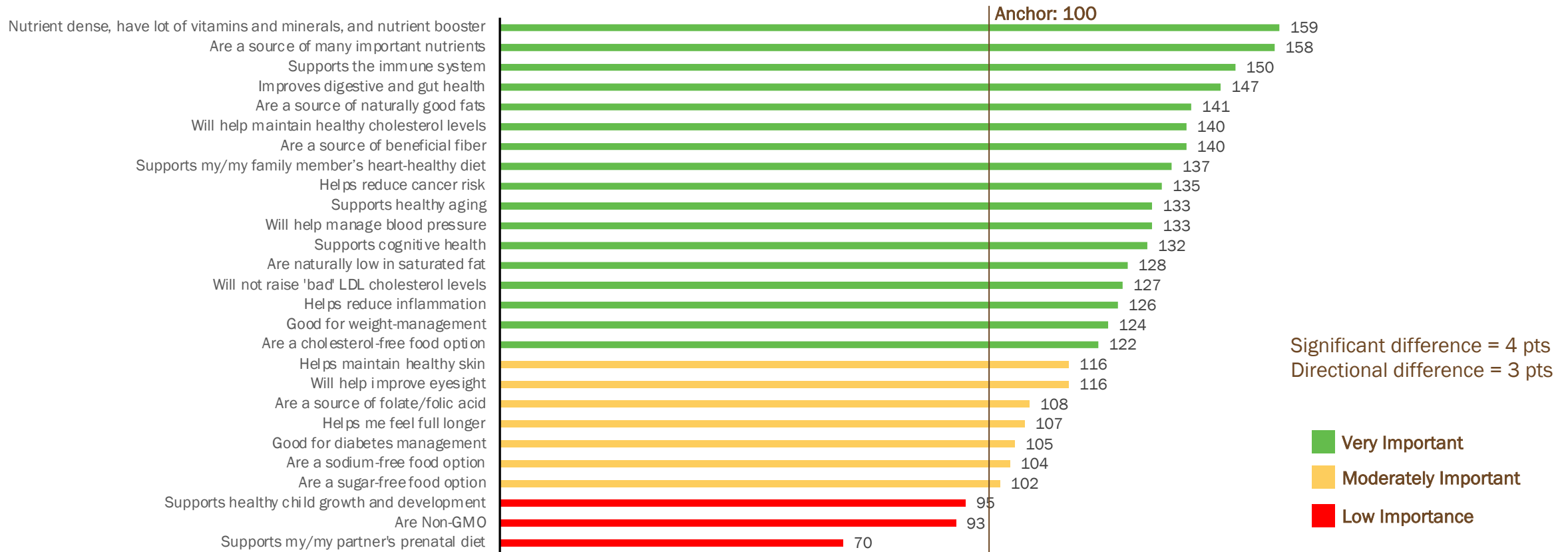
While MaxDiff addresses the issue of relative importance, it fails to tell you if anything is actually important. To address this, a second exercise, called “anchoring” is incorporated. It determines the score at which variables are indeed important. Anything well above this anchor is very important, 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”.

Avocado Purchase Drivers and Barriers

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 nutrient dense and being a source of many important nutrients. Another 15 attributes (down from a total of 22 being of high importance last year) are also very important. Most of the rest are moderately important. As shown on the following slides, these decreases are seen across all segments.



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=1,628)	Non-Purchasers (n=780) A	Light (n=531) B	Medium (n=412) C	Heavy (n=351) D	Super Heavy (n=326) E
Nutrient dense, have lot of vitamins and minerals, and nutrient booster	159	167	142	159A	171AB	171AB	172AB
Are a source of many important nutrients	158	167	141	158A	170AB	172AB	172AB
Supports the immune system	150	158	132	144A	162AB	167ABc	167ABc
Improves digestive and gut health	147	156	127	141A	159AB	166ABc	165ABc
Are a source of naturally good fats	141	154	114	139A	157AB	163ABc	164ABc
Will help maintain healthy cholesterol levels	140	150	120	135A	155AB	158AB	161ABc
Are a source of beneficial fiber	140	150	118	134A	155AB	160ABc	158AB
Supports my/my family member's heart-healthy diet	137	147	116	129A	152AB	156AB	162ABCd
Helps reduce cancer risk	135	143	117	127A	146AB	153ABc	156ABC
Supports healthy aging	133	143	113	128A	147AB	150AB	154ABc
Will help manage blood pressure	133	141	116	122a	145AB	151ABc	157ABCd
Supports cognitive health	132	142	113	123A	146AB	152ABc	156ABC
Are naturally low in saturated fat	128	140	103	123A	142AB	149ABc	154ABC
Will not raise 'bad' LDL cholesterol levels	127	137	106	122A	141AB	146AB	149ABc
Helps reduce inflammation	126	136	105	117A	140AB	147ABc	151ABC
Good for weight-management	124	134	103	116A	135AB	146ABC	149ABC
Are a cholesterol-free food option	122	133	101	115A	137AB	143ABc	147ABC
Helps maintain healthy skin	116	127	93	105A	128AB	142ABC	145ABC
Will help improve eyesight	116	124	97	102	127AB	137ABC	143ABC
Are a source of folate/folic acid	108	119	86	95A	122AB	131ABC	141ABCD
Helps me feel full longer	107	116	88	96a	112AB	130ABC	137ABCd
Good for diabetes management	105	114	87	88	116AB	129ABC	137ABCd
Are a sodium-free food option	104	113	84	91a	116AB	125ABc	133ABCd
Are a sugar-free food option	102	111	83	89a	112AB	124ABC	130ABC
Supports healthy child growth and development	95	104	76	72	108AB	124ABC	133ABCd
Are Non-GMO	93	104	72	80a	105AB	118ABC	124ABC
Supports my/my partner's prenatal diet	70	79	52	50	78AB	96ABC	108ABCd

Attributes Considered Most Important When Deciding to Purchase Fresh Fruits & Vegetables

Non-avocado purchasers are driving many of the decreases seen this year in the importance of various attributes.

	Total Sample				Non-Avocado Purchasers			
	2019 (n=2,400) A	2021 (n=2,400) B	2022 (n=2,401) C	2023 (n=2,400) D	2019 (n=766) A	2021 (n=585) B	2022 (n=510) C	2023 (n=666) D
Nutrient dense, have lot of vitamins and minerals, and nutrient booster (word change 2022)	161	162D	166ABD	159	144	142	147d	140
Are a source of many important nutrients	159	162AD	166ABD	158	140	142	148AbD	140
Supports the immune system (word change 2022)	141	149A	158ABD	150A	117	126A	137ABd	132Ab
Improves digestive and gut health (word change 2023)	142	147A	150Abd	147A	124	124	127	126
Are a source of naturally good fats	148D	153AD	155AD	141	123D	124D	125D	112
Will help maintain healthy cholesterol levels	142	150AD	152AbD	140	123	126d	127D	119
Are a source of beneficial fiber	143d	151AD	151AD	140	122d	129aD	127D	117
Supports my/my family member's heart-healthy diet (word change 2023)	128	136A	159ABD	137A	105	108	138ABD	115Ab
Supports healthy aging (word change 2022)	147D	153ACD	148D	133	130D	134cD	127D	113
Will help manage blood pressure	132	140AD	143AbD	133	115	117	122ad	116
Supports cognitive health (word change 2022)	71	94A	142ABD	132AB	46	64A	118AB	113AB
Are naturally low in saturated fat	136D	143AD	145AD	128	112D	115D	115D	102
Will not raise 'bad' LDL cholesterol levels	132D	139AD	142AbD	127	111d	115D	118aD	106
Good for weight- management	125	132AD	133AD	124	107	109	107	103
Are a cholesterol-free food option	126D	137AD	140AbD	122	106d	112aD	112aD	100
Helps maintain healthy skin (word change 2022)	96	112A	133ABD	116Ab	69	81A	100ABd	92AB
Will help improve eyesight	120D	129AD	130AD	116	102	104d	105d	97
Are a source of folate/folic acid	112D	124AD	125AD	108	86	95AD	91ad	85
Good for diabetes management	101	116AD	117AD	105A	82	93A	92A	88a
Are a sodium-free food option	109D	122AD	122AD	104	89	97AD	93D	84
Are a sugar-free food option	107D	120AD	120AD	102	87	96AcD	90d	83
Supports healthy child growth and development (word change 2023)	85	97A	101AbD	95A	63	66	65	76ABC
Are Non-GMO	98d	110AD	116ABD	93	72	80AD	81AD	72
Supports my/my partner's prenatal diet (word change 2023)	65	85AD	83AD	70A	43	54AC	45	53AC

Attributes Considered Most Important When Deciding to Purchase Fresh Fruits & Vegetables

Light and medium avocado purchasers are also driving many of the decreases seen this year in the importance of various attributes.

	Light Avocado Purchasers				Medium Avocado Purchasers			
	2019 (n=297) A	2021 (n=499) B	2022 (n=505) C	2023 (n=531) D	2019 (n=384) A	2021 (n=418) B	2022 (n=421) C	2023 (n=412) D
Nutrient dense, have lot of vitamins and minerals, and nutrient booster (word change 2022)	158	161	162	159	163	165	171Ab	171Ab
Are a source of many important nutrients	155	160	161a	158	161	166	171Ab	170Ab
Supports the immune system (word change 2022)	132	141a	147Ab	144A	142	153A	164AB	162AB
Improves digestive and gut health (word change 2023)	131	137a	135	141Ac	142	152A	158Ab	159AB
Are a source of naturally good fats	144	149D	150D	139	152	161A	165AD	157
Will help maintain healthy cholesterol levels	133	142ad	144AD	135	145	155A	159A	155A
Are a source of beneficial fiber	132	145AD	140ad	134	144	155A	158A	155A
Supports my/my family member's heart-healthy diet (word change 2023)	111	125A	153ABD	129A	131	142A	166ABD	152AB
Supports healthy aging (word change 2022)	142D	148CD	139D	128	147	157AD	155ad	147
Will help manage blood pressure	120	128ad	128a	122	131	143A	148A	145A
Supports cognitive health (word change 2022)	50	68A	128AB	123AB	68	97A	150AB	146AB
Are naturally low in saturated fat	127	134aD	136AD	123	140	151AD	154AD	142
Will not raise 'bad' LDL cholesterol levels	121	128ad	133AD	122	133	147A	149Ad	141a
Good for weight- management	110	119a	118a	116	126	136A	138A	135a
Are a cholesterol-free food option	112	125AD	128AD	115	130	143Ad	148AD	137a
Helps maintain healthy skin (word change 2022)	80	91A	115ABD	105AB	96	117A	145ABD	128AB
Will help improve eyesight	107	113D	110d	102	119	132A	138AD	127a
Are a source of folate/folic acid	96	107AD	104aD	95	115	129Ad	132AD	122a
Good for diabetes management	83	93a	92a	88	98	117A	121A	116A
Are a sodium-free food option	92	105AD	103AD	91	112	124Ad	129AD	116
Are a sugar-free food option	90	102AD	101AD	89	109	120Ad	128AbD	112
Supports healthy child growth and development (word change 2023)	57	69A	69A	72A	85	96A	103A	108AB
Are Non-GMO	84	89d	96AbD	80	98	115AD	125AbD	105a
Supports my/my partner's prenatal diet (word change 2023)	38	58AcD	50A	50A	64	85Ad	89AD	78A

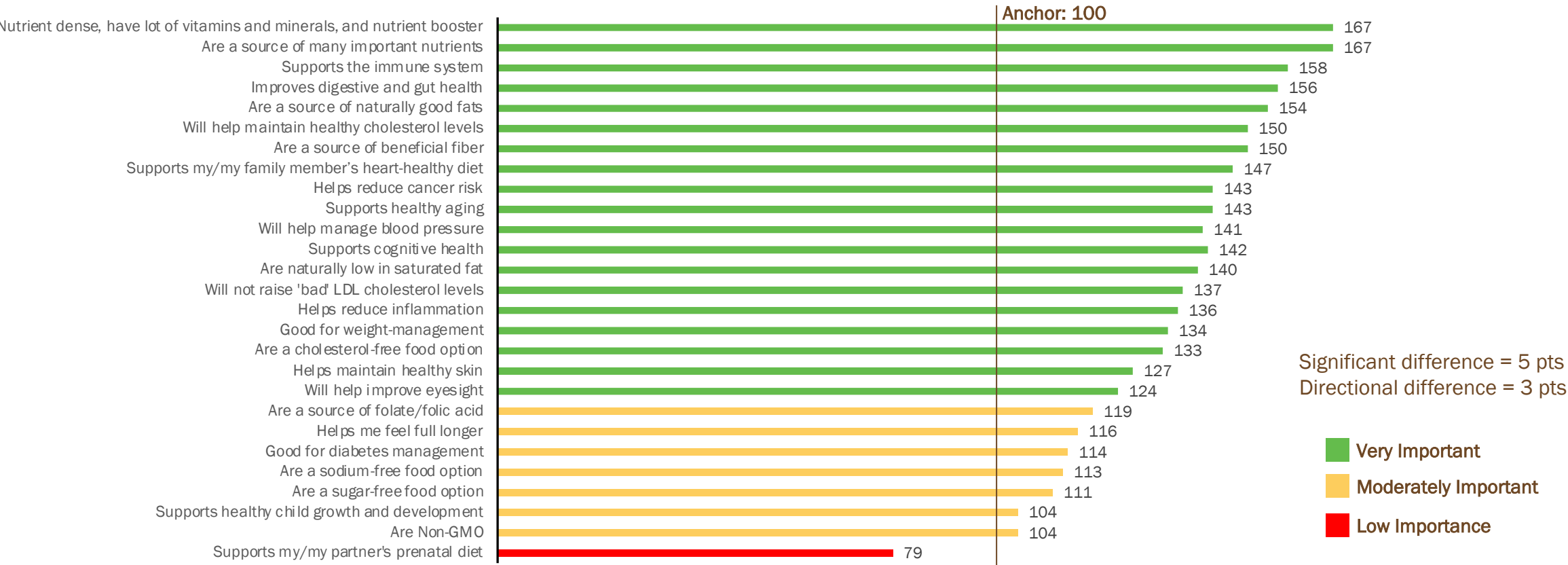
Attributes Considered Most Important When Deciding to Purchase Fresh Fruits & Vegetables

Heavy and super heavy avocado purchasers are driving many of the decreases seen this year in the importance of various attributes.

	Heavy Avocado Purchasers				Super Heavy Avocado Purchasers			
	2019 (n=382) A	2021 (n=440) B	2022 (n=518) C	2023 (n=351) D	2019 (n=473) A	2021 (n=360) B	2022 (n=355) C	2023 (n=326) D
Nutrient dense, have lot of vitamins and minerals, and nutrient booster (word change 2022)	176d	175	177d	171	179D	178d	176d	172
Are a source of many important nutrients	175	176	177d	172	178d	177d	177d	172
Supports the immune system (word change 2022)	162	167a	173ABd	167a	168	172d	174aD	167
Improves digestive and gut health (word change 2023)	159	165a	170Ab	166A	167	171d	170	165
Are a source of naturally good fats	168d	171D	171D	163	172D	174D	172D	164
Will help maintain healthy cholesterol levels	159	167AD	168AD	158	166d	171aD	169D	161
Are a source of beneficial fiber	163	167aD	168aD	160	168D	172aD	169D	158
Supports my/my family member's heart-healthy diet (word change 2023)	150	159A	172ABD	156a	159	166a	173ABD	162
Supports healthy aging (word change 2022)	163D	167aD	163D	150	169D	171cD	165D	154
Will help manage blood pressure	145	159AD	162AD	151	158	166AD	164ad	157
Supports cognitive health (word change 2022)	89	129A	163ABD	152AB	118	141A	163ABd	156AB
Are naturally low in saturated fat	157D	164AD	163aD	149	163D	169aD	165D	154
Will not raise 'bad' LDL cholesterol levels	149	160AD	160AD	146	158D	164aD	161D	149
Good for weight- management	142	155AD	153Ad	146	153	161aD	161AD	149
Are a cholesterol-free food option	144	160AD	160AD	143	155d	165AD	163AD	147
Helps maintain healthy skin (word change 2022)	117	143A	159ABD	142A	135	151A	161ABD	145A
Will help improve eyesight	136	152AD	154AD	137	151d	159aD	158aD	143
Are a source of folate/folic acid	135	151AD	153AD	131	149d	159AD	156aD	141
Good for diabetes management	114	144AD	144AD	129A	137	156AD	151AD	137
Are a sodium-free food option	125	148AD	149AD	125	142d	157AD	153AD	133
Are a sugar-free food option	119	147AD	148AD	124	141D	155AD	152AD	130
Supports healthy child growth and development (word change 2023)	103	135AD	138AD	124A	131	148AD	148AD	133
Are Non-GMO	115	141AD	144AD	118	140D	150AD	146aD	124
Supports my/my partner's prenatal diet (word change 2023)	82	123AD	122AD	96A	112	135AD	131AD	108

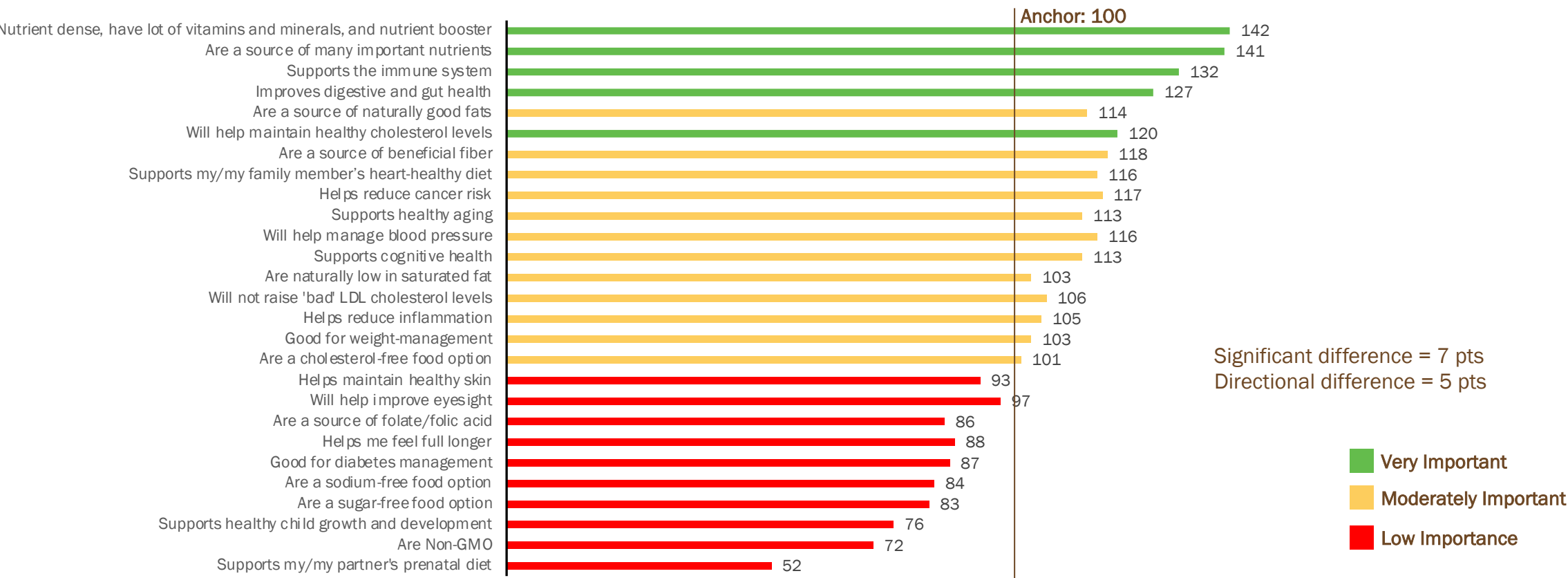
Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables

Among total avocado purchasers, The top two decision drivers when purchasing fresh produce are being nutrient dense and being a source of many important nutrients. Another 17 (versus 22 last year) attributes are also very important. Most of the rest are moderately important.



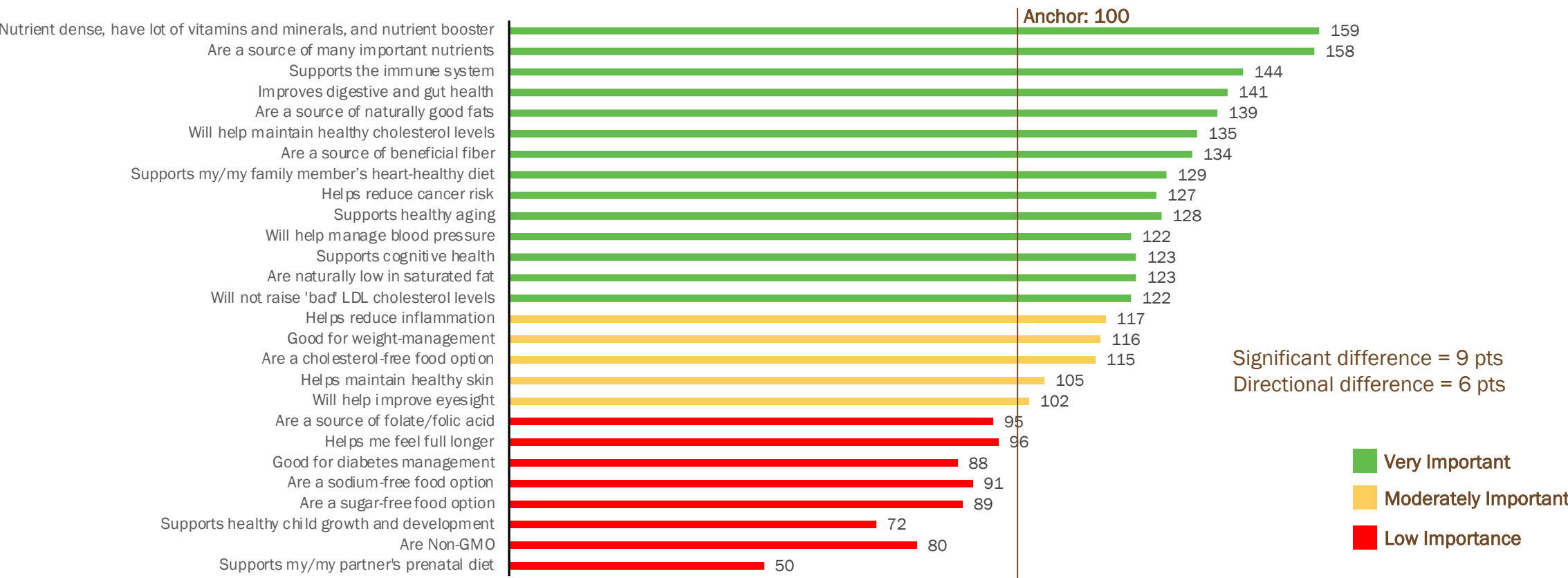
Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables

Non-purchasers of avocados have less attributes of high importance than seen overall (5 vs. 17) and many more non-important attributes than see in total (10 vs. 3).



Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables

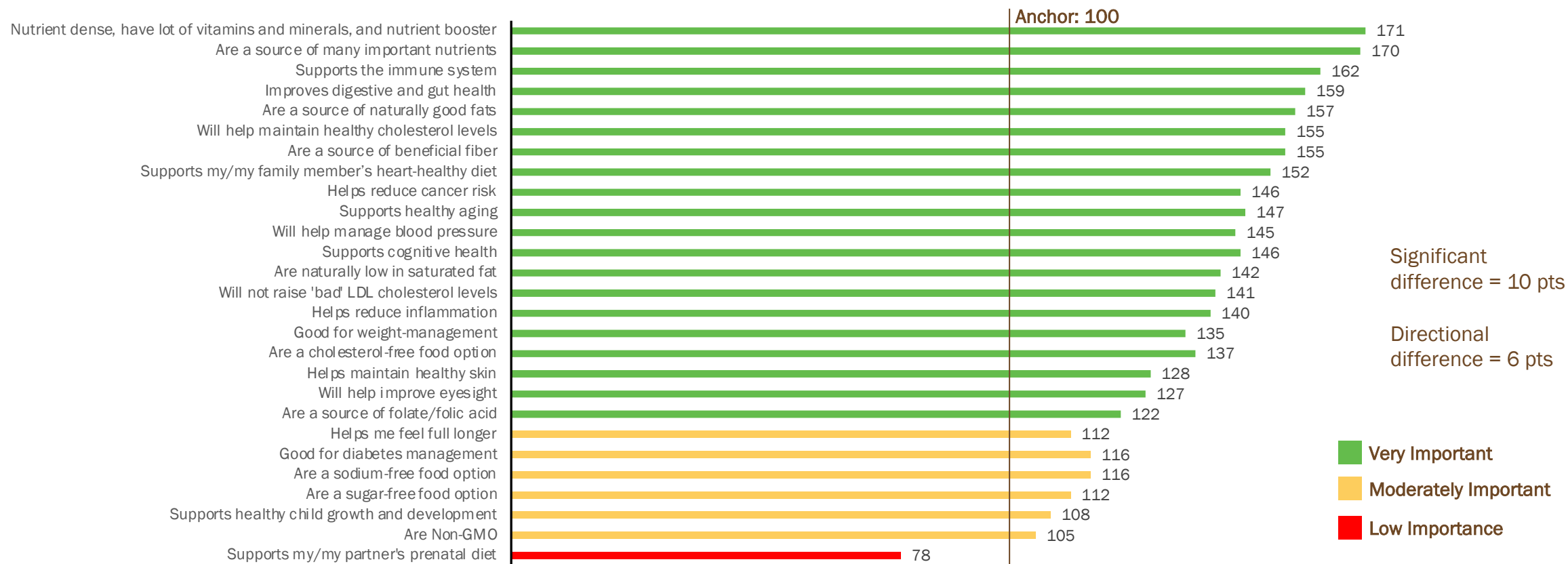
The most important attributes overall remain at the top among Light avocado purchasers, but a number of them drop into moderate to low importance



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

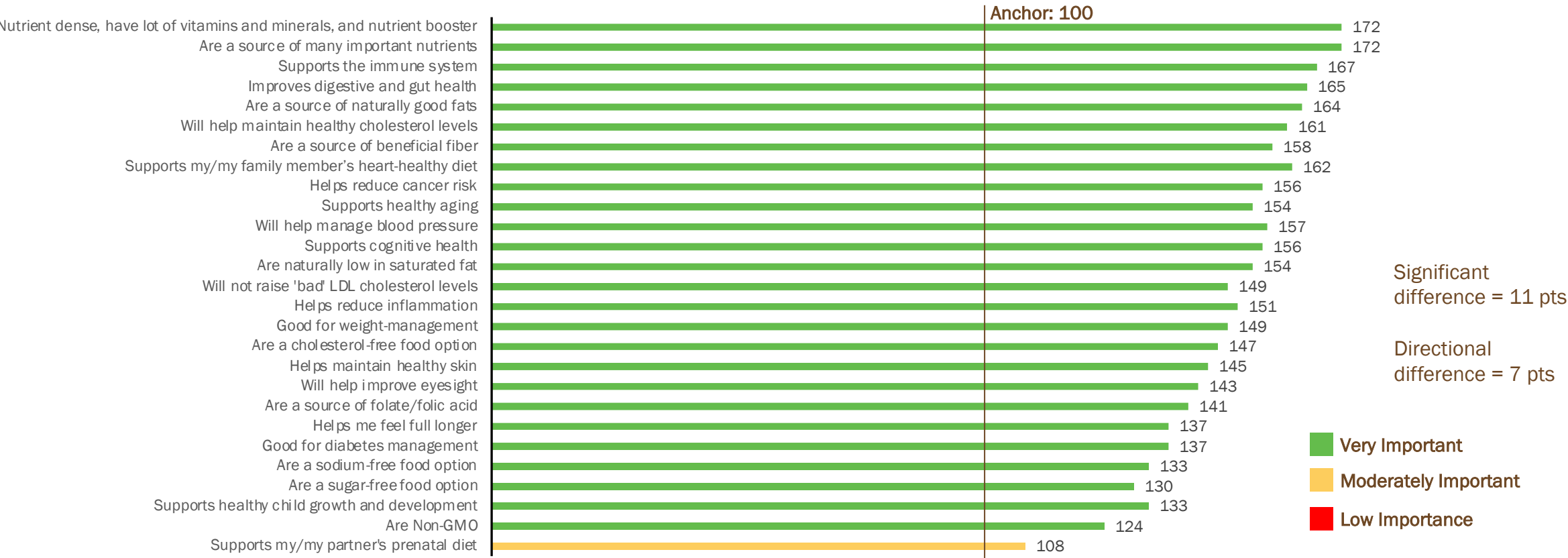
Heavy avocado purchasers find almost all of the attributes to be of high importance.



Avocado Purchase Drivers and Barriers

Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables

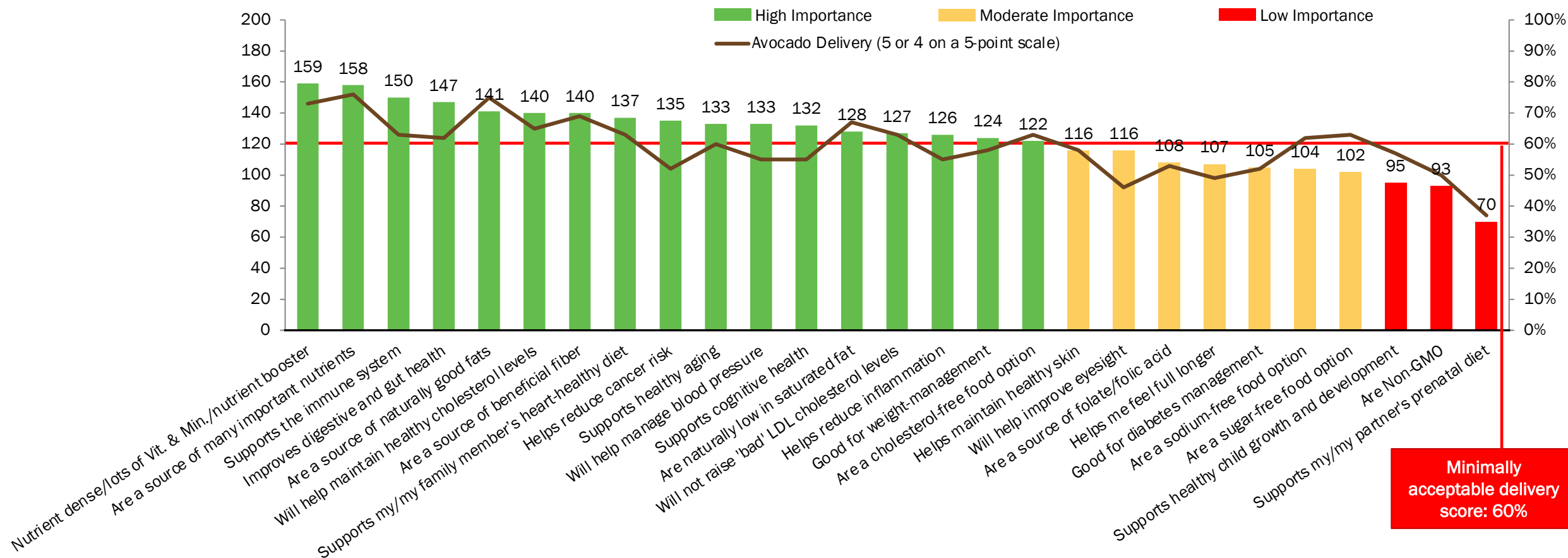
Super Heavy purchasers consider all but one attribute to be high in importance.



Avocado Purchase Drivers and Barriers

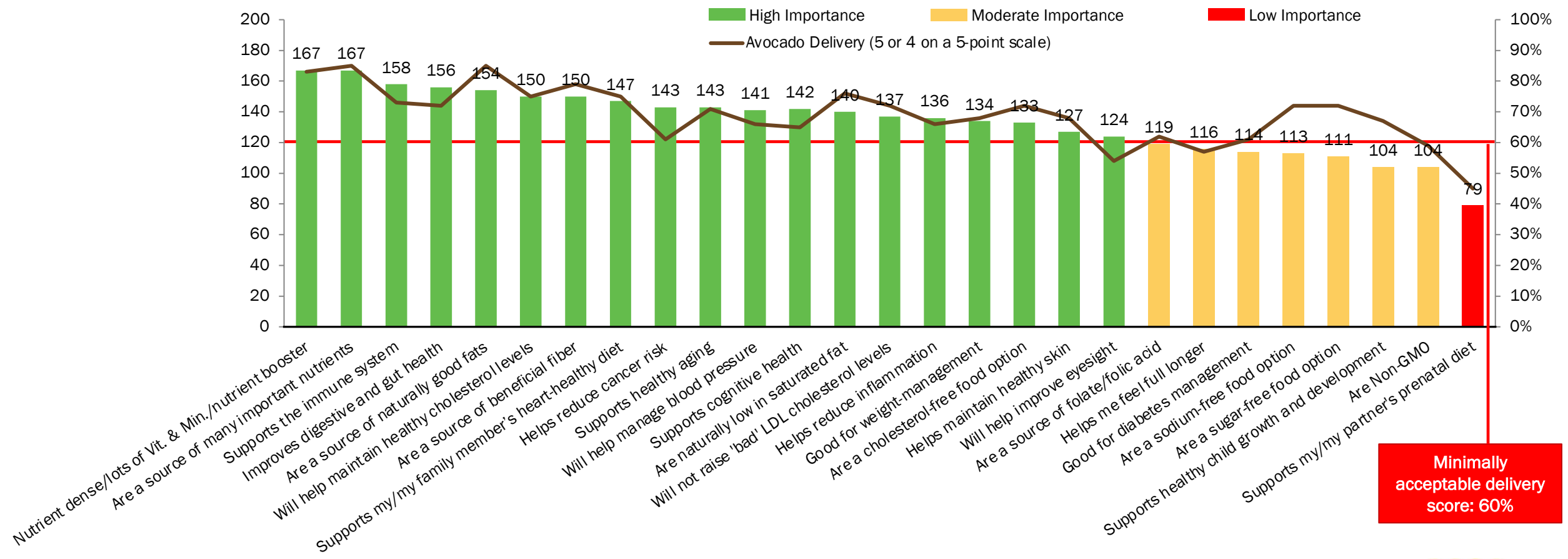
Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables vs. Avocado Delivery

Avocados continue to have reasonably strong perceived deliver against many, but not all of the most important attributes. Scores are somewhat lower for helping to reduce cancer risk, helping to manage high blood pressure, supports cognitive health and helps reduce inflammation.



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

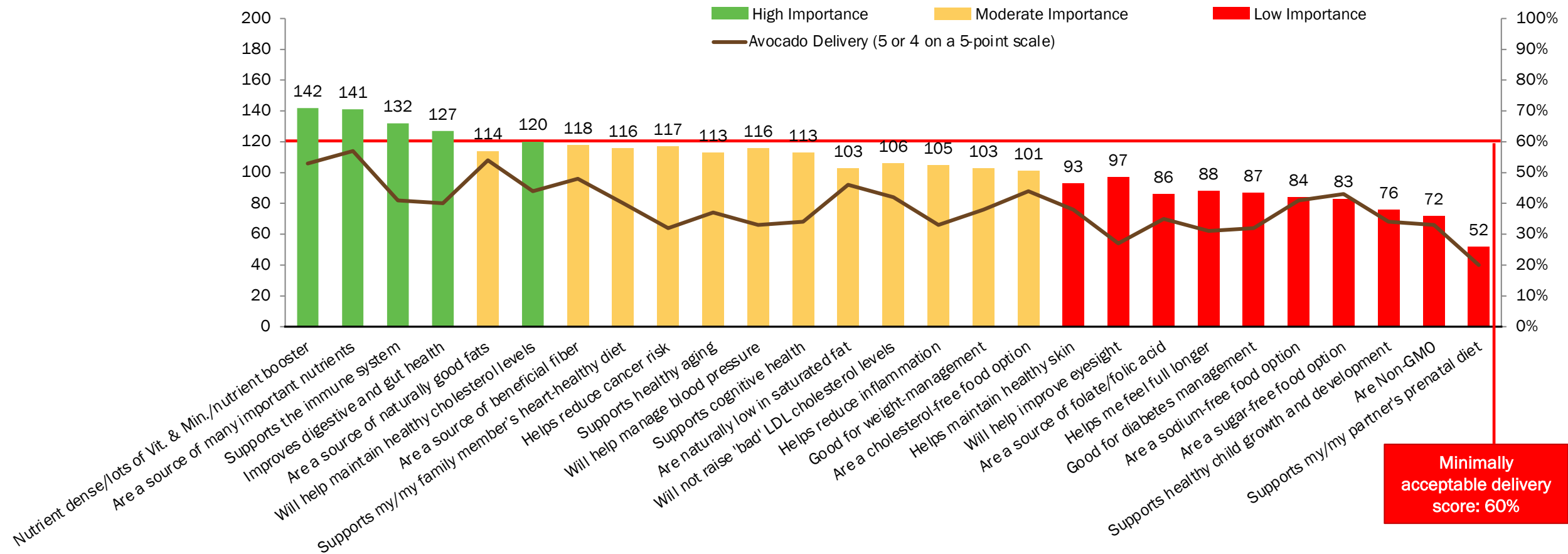
Among total avocado purchasers, Avocados have reasonably strong perceived deliver against all of the most important attributes except improving eyesight.



Avocado Purchase Drivers and Barriers

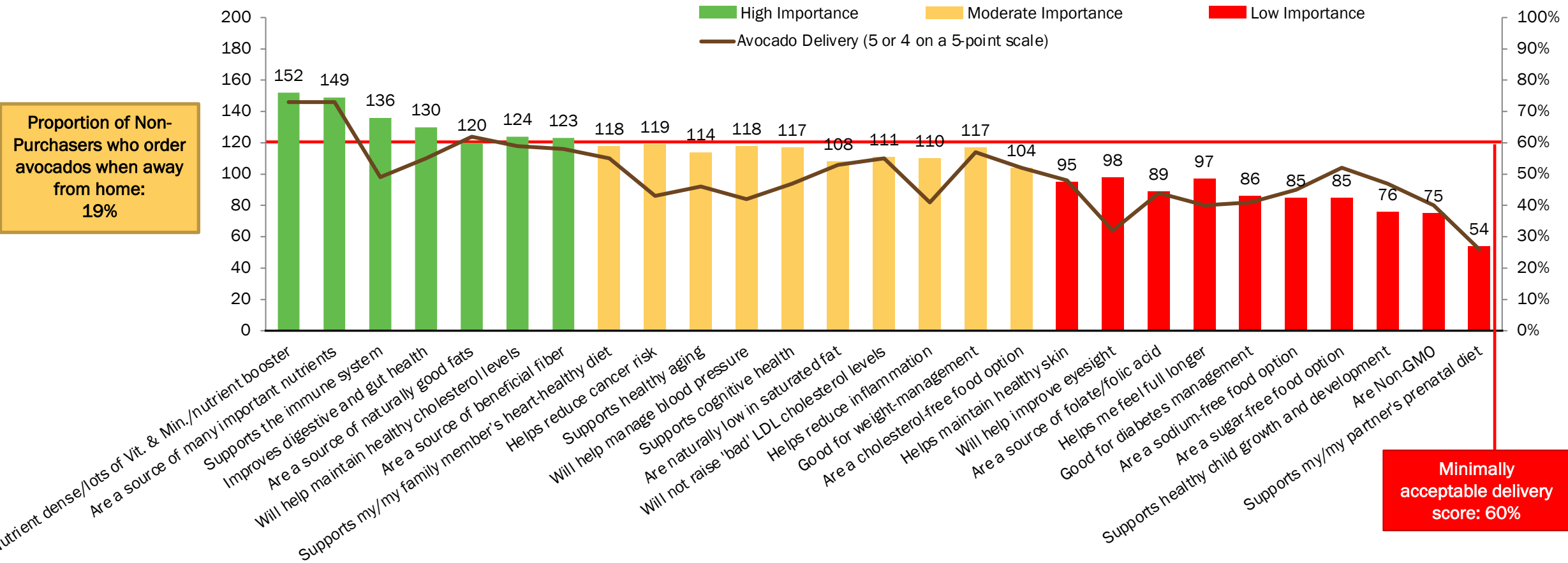
Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables vs. Avocado Delivery

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

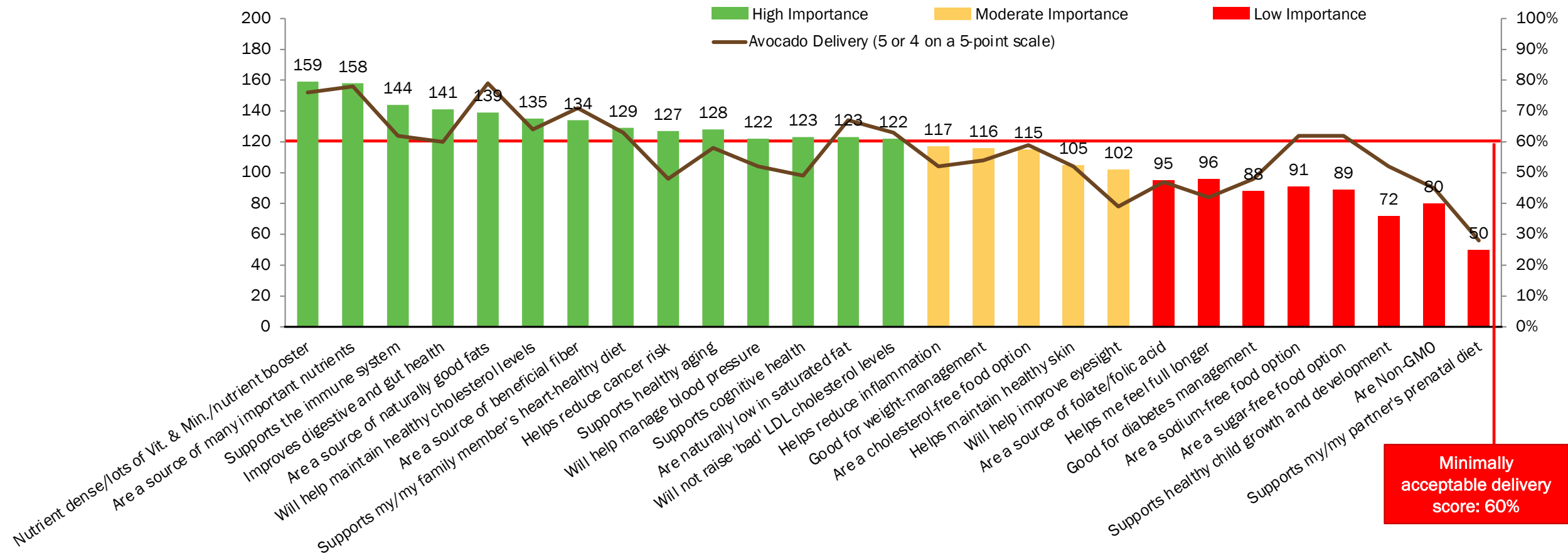
As seen before, Avocados receive stronger scores among non-purchasers who do order avocados when away from home than seen among non-purchasers overall.



Avocado Purchase Drivers and Barriers

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

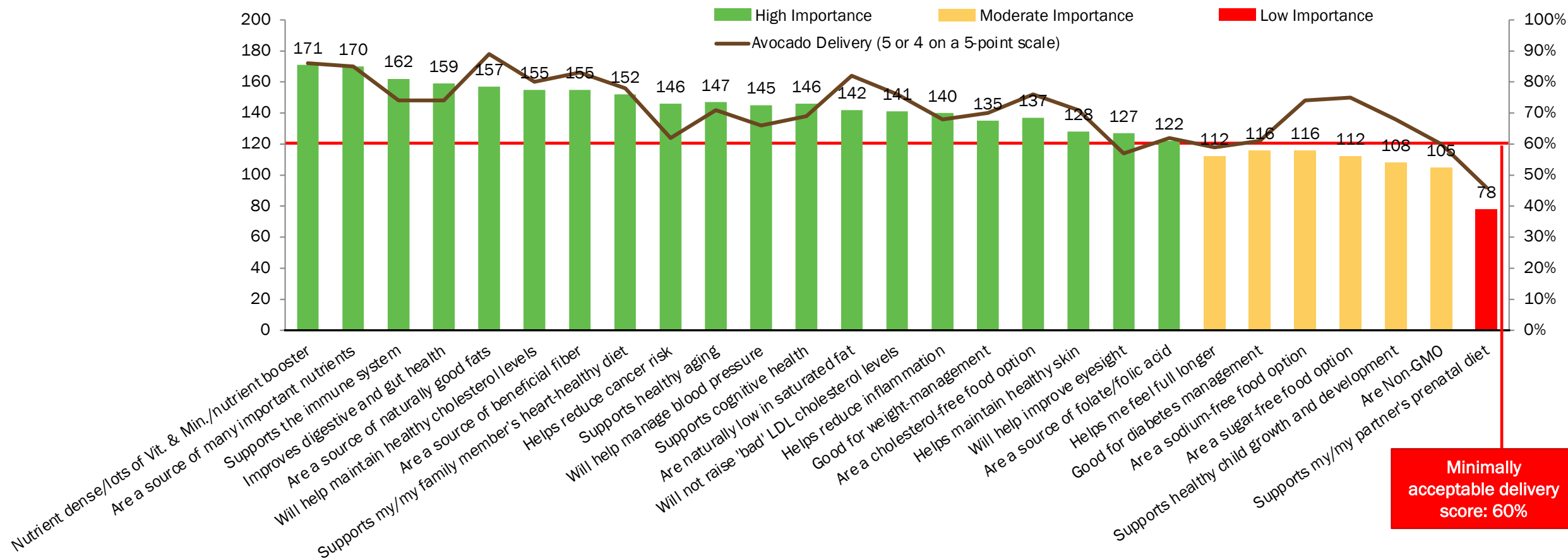
Perceptions of avocados are reasonably strong among Light purchasers for most, but not all of the high importance attributes.



Avocado Purchase Drivers and Barriers

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

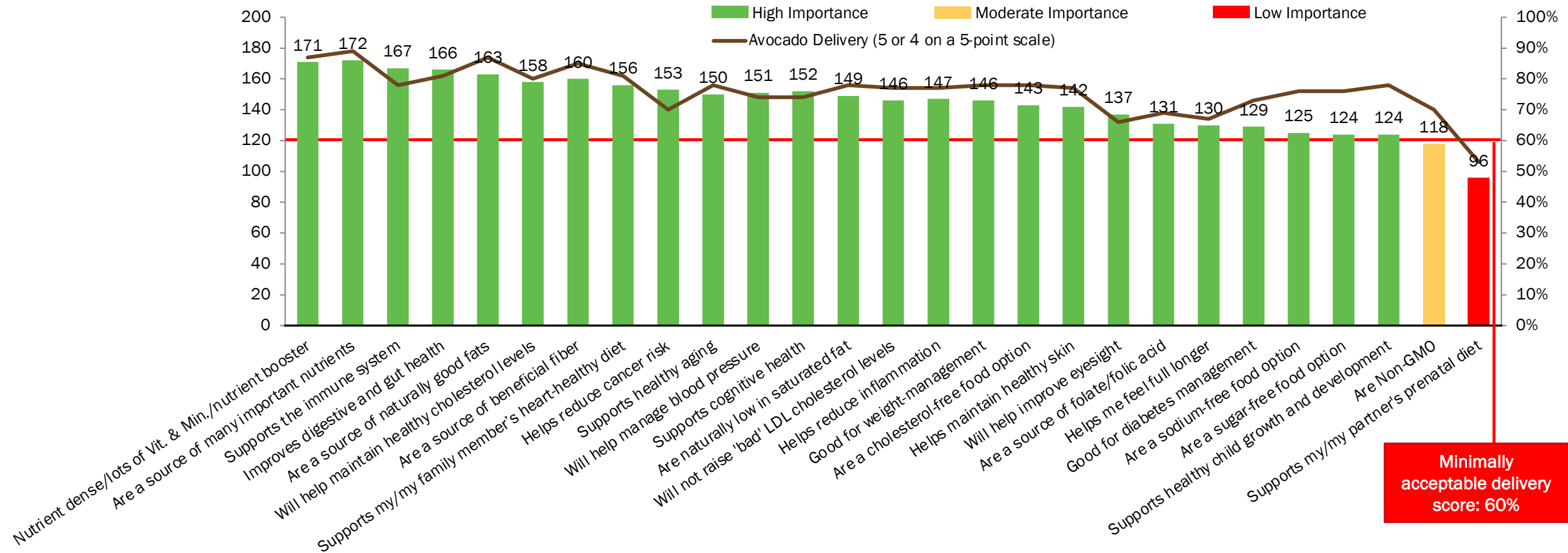
Avocados do very well for most of the high importance attributes among Medium purchasers.



Avocado Purchase Drivers and Barriers

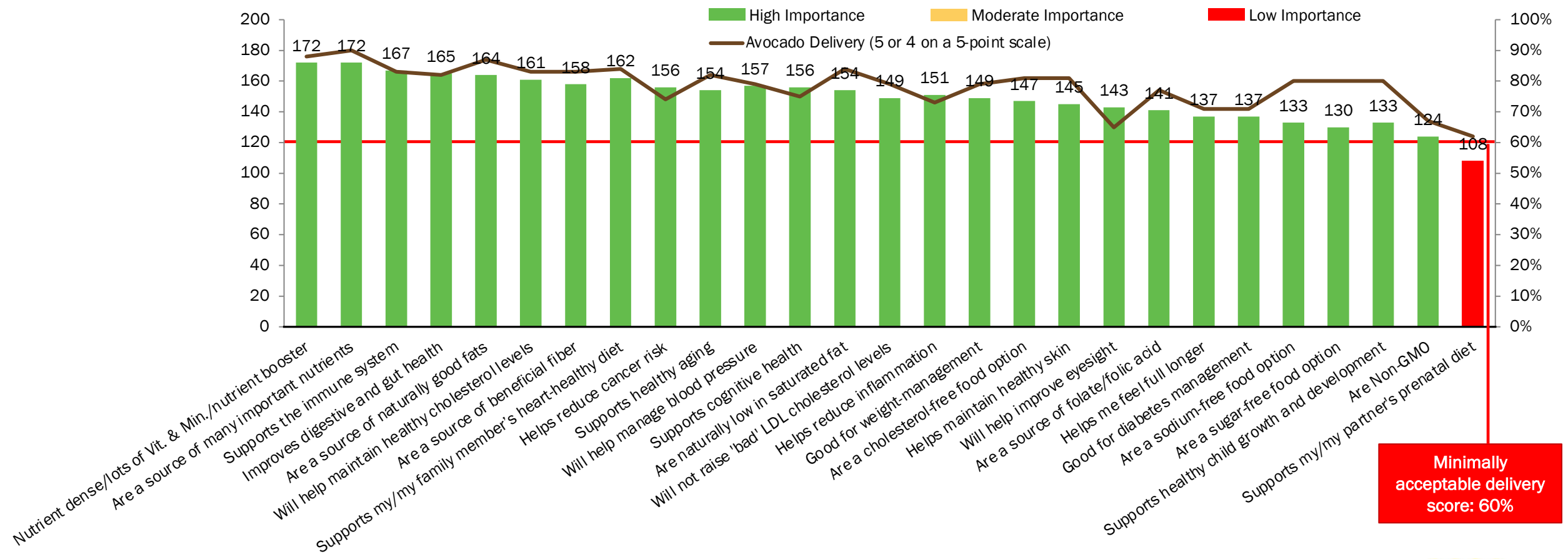
Attributes Considered Important When Deciding to Purchase Fresh Fruits & Vegetables vs. Avocado Delivery

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)

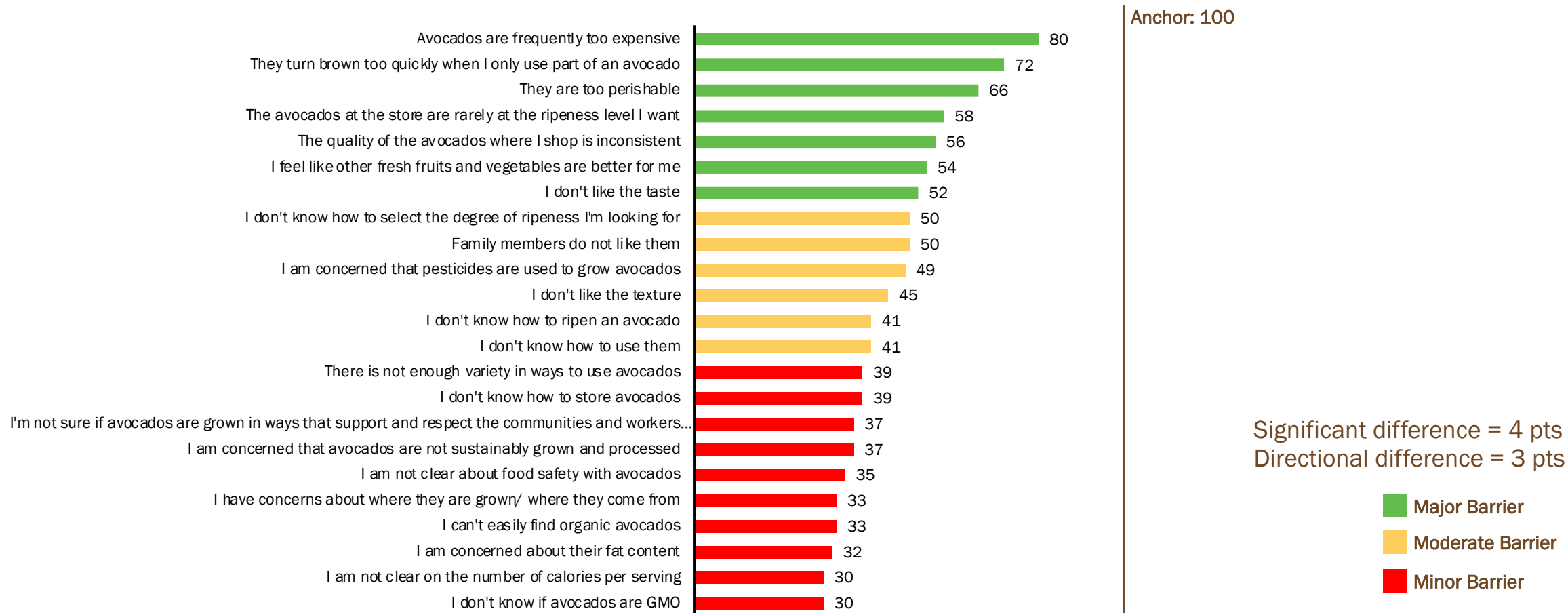
As avocado purchase levels go up, so does agreement with the descriptive statements for avocados.

	Total Sample (n=2,400)	Total Purchasers (n=1,628)	Non-Purchasers (n=780) A	Light (n=531) B	Medium (n=412) C	Heavy (n=351) D	Super Heavy (n=326) E
Nutrient dense, have lot of vitamins and minerals, and nutrient booster	73	83	53	76A	86AB	87AB	88AB
Are a source of many important nutrients	76	85	57	78A	85AB	89ABC	90ABC
Supports the immune system	63	73	41	62A	74AB	78AB	83ABCd
Improves digestive and gut health	62	72	40	60A	74AB	81ABC	82ABC
Are a source of naturally good fats	75	85	54	79A	89AB	87AB	87AB
Will help maintain healthy cholesterol levels	65	75	44	64A	80AB	80AB	83AB
Are a source of beneficial fiber	69	79	48	71A	83AB	85AB	83AB
Supports my/my family member's heart-healthy diet	63	75	40	63A	78AB	81AB	84ABC
Helps reduce cancer risk	52	61	32	48A	62AB	70ABC	74ABC
Supports healthy aging	60	71	37	58A	71AB	78ABC	82ABC
Will help manage blood pressure	55	66	33	52A	66AB	74ABC	79ABCd
Supports cognitive health	55	65	34	49A	69AB	74ABc	75ABc
Are naturally low in saturated fat	67	76	46	67A	82AB	78AB	84ABd
Will not raise 'bad' LDL cholesterol levels	63	72	42	63A	76AB	77AB	79AB
Helps reduce inflammation	55	66	33	52A	68AB	77ABC	73ABc
Good for weight-management	58	68	38	54A	70AB	78ABC	79ABC
Are a cholesterol-free food option	63	72	44	59A	76AB	78AB	81ABc
Helps maintain healthy skin	58	68	38	52A	71AB	77ABC	81ABC
Will help improve eyesight	46	54	27	39A	57AB	66ABC	65ABC
Are a source of folate/folic acid	53	62	35	47A	62AB	69ABC	77ABCD
Helps me feel full longer	49	57	31	42A	59AB	67ABC	71ABC
Good for diabetes management	52	61	32	48A	61AB	73ABC	71ABC
Are a sodium-free food option	62	72	41	62A	74AB	76AB	80ABCd
Are a sugar-free food option	63	72	43	62A	75AB	76AB	80ABc
Supports healthy child growth and development	57	67	34	52A	68AB	78ABC	80ABC
Are Non-GMO	50	59	33	45A	60AB	70ABC	67ABc
Supports my/my partner's prenatal diet	37	45	20	28A	46AB	53ABc	62ABCD

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. These were also the top barriers last year.



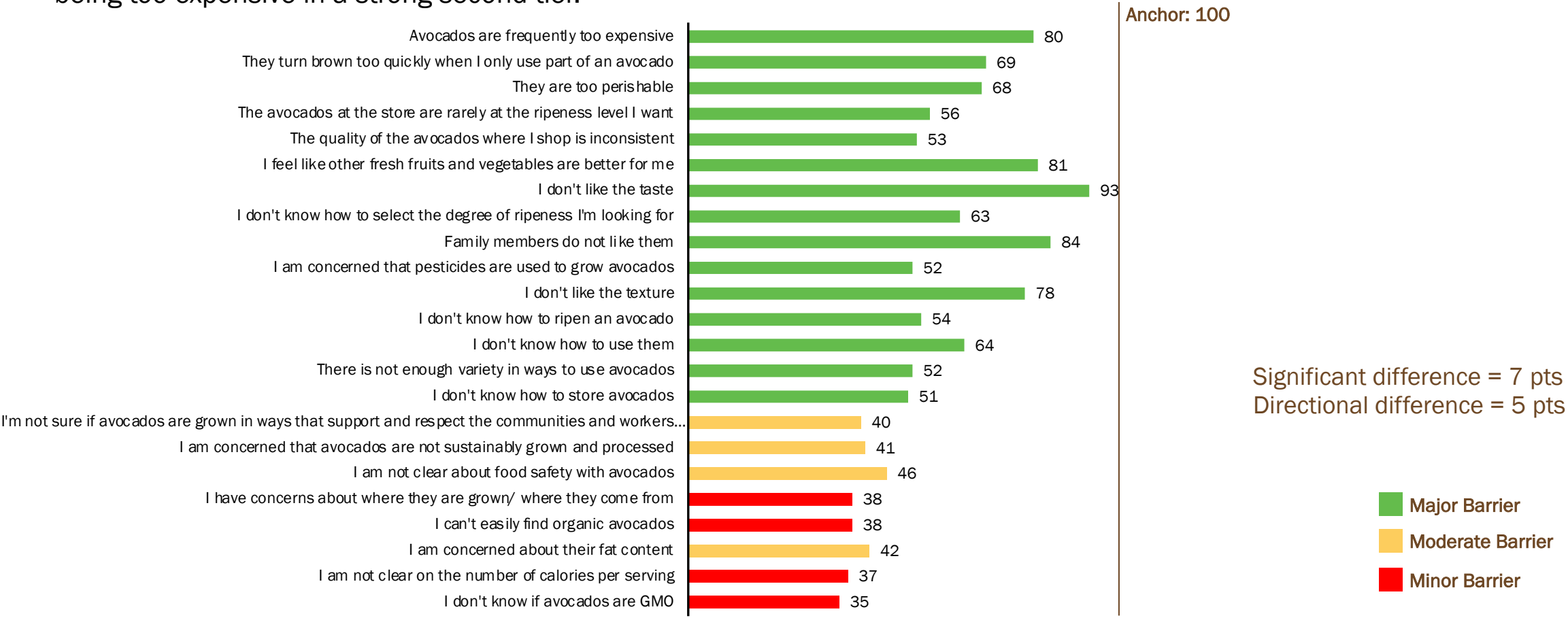
Barriers to Purchasing Avocados (More Often)

Frequently being too expensive remains 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.



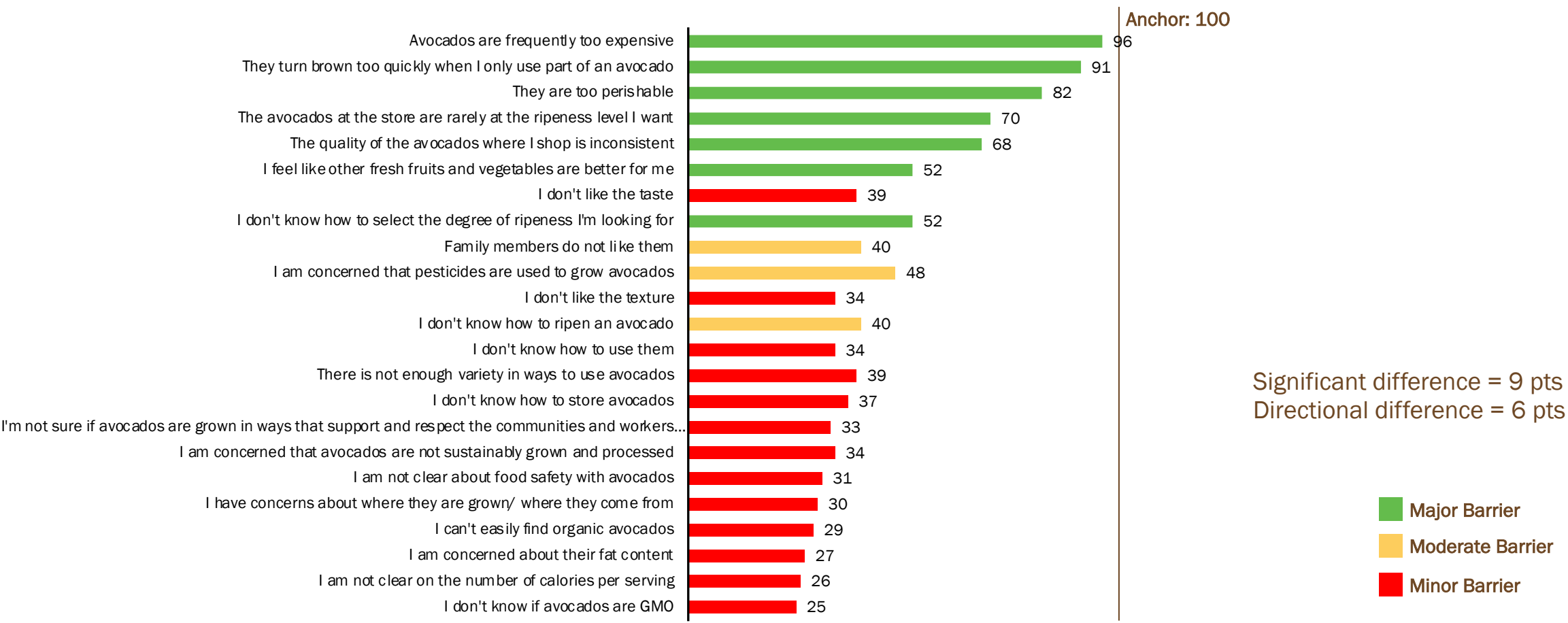
Barriers to Purchasing Avocados

In the past, taste was a top barrier among non-purchasers who order avocados away from home – but it has dropped to sixth place. Being too expensive is the top barrier.



Barriers to Purchasing Avocados More Often

Frequently being too expensive is the top barrier for Light purchasers, followed by turning brown too quickly.



Barriers to Purchasing Avocados More Often

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



Avocado Purchase Drivers and Barriers

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, turning brown too quickly and being perishable are the only major barriers among Super Heavy purchasers. Last year, being too expensive was the only major barrier.



Major Barriers to Purchasing Avocados

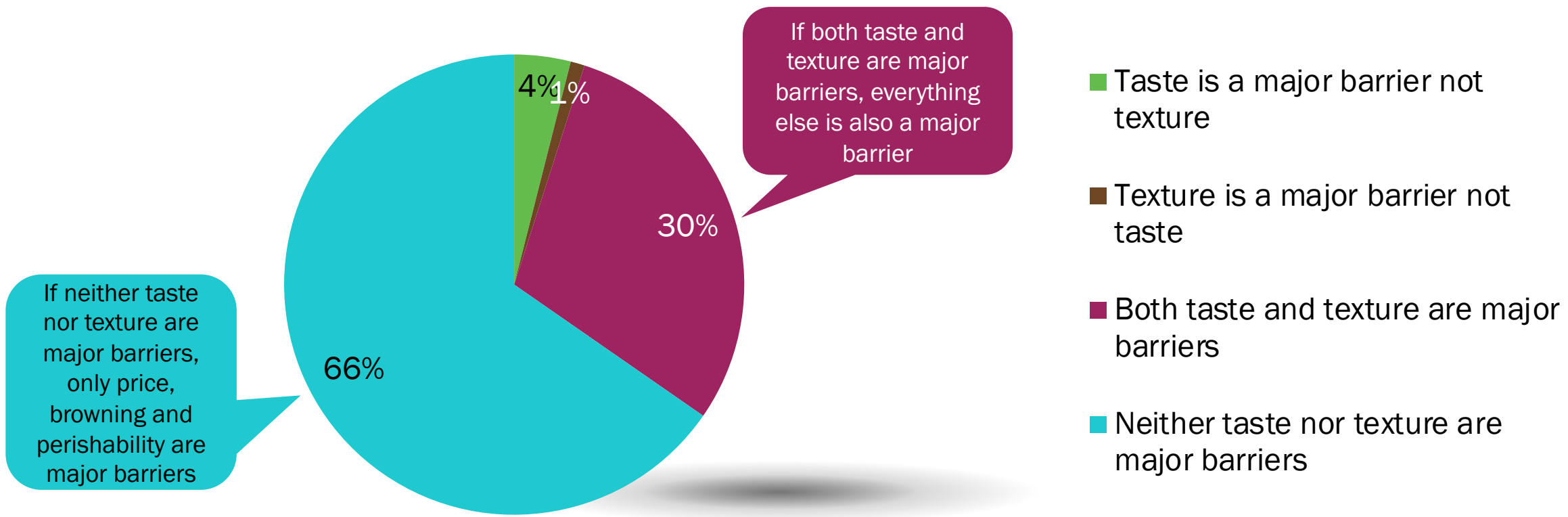
(More Often)

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=1,628)	Non-Purchasers (n=780) A	Light (n=531) B	Medium (n=412) C	Heavy (n=351) D	Super Heavy (n=326) E
Avocados are frequently too expensive	80	81	80E	96ACDE	77E	75e	65
They turn brown too quickly when I only use part of an avocado	72	73	69E	91ACDE	69E	65e	58
They are too perishable	66	65	68cDE	82ACDE	62E	57e	51
The avocados at the store are rarely at the ripeness level I want	58	60	56e	70ACDE	56e	56e	50
The quality of the avocados where I shop is inconsistent	56	58	53	68ACDE	55	54	50
I feel like other fresh fruits and vegetables are better for me	54	41	81BCDE	52CDE	35	38	35
I don't like the taste	52	32	93BCDE	39CDE	27	31c	28
I don't know how to select the degree of ripeness I'm looking for	50	44	63BCDE	52CDE	38	43c	39
Family members do not like them	50	34	84BCDE	40CdE	28	33c	31
I am concerned that pesticides are used to grow avocados	49	48	52	48	48	49	49
I don't like the texture	45	30	78BCDE	34CdE	25	30c	27
I don't know how to ripen an avocado	41	35	54BCDE	40CdE	31	34	33
I don't know how to use them	41	30	64BCDE	34Cde	26	29	28
There is not enough variety in ways to use avocados	39	33	52BCDE	39CDE	29	31	30
I don't know how to store avocados	39	33	51BCDE	37Ce	30	33	31

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.

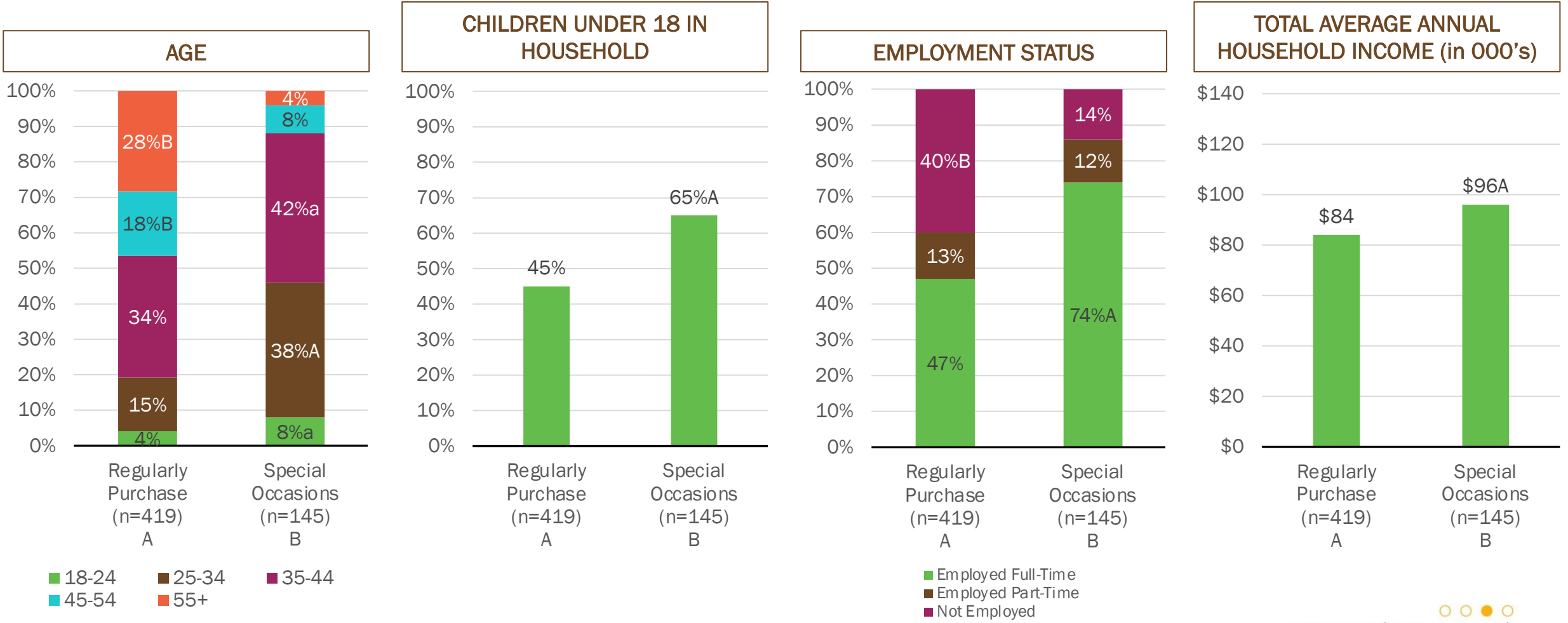


Heavy/Super Heavy Purchaser Deep Dive

Understanding regular vs. primarily special occasion purchasers among Heavy/Super Heavy purchasers.

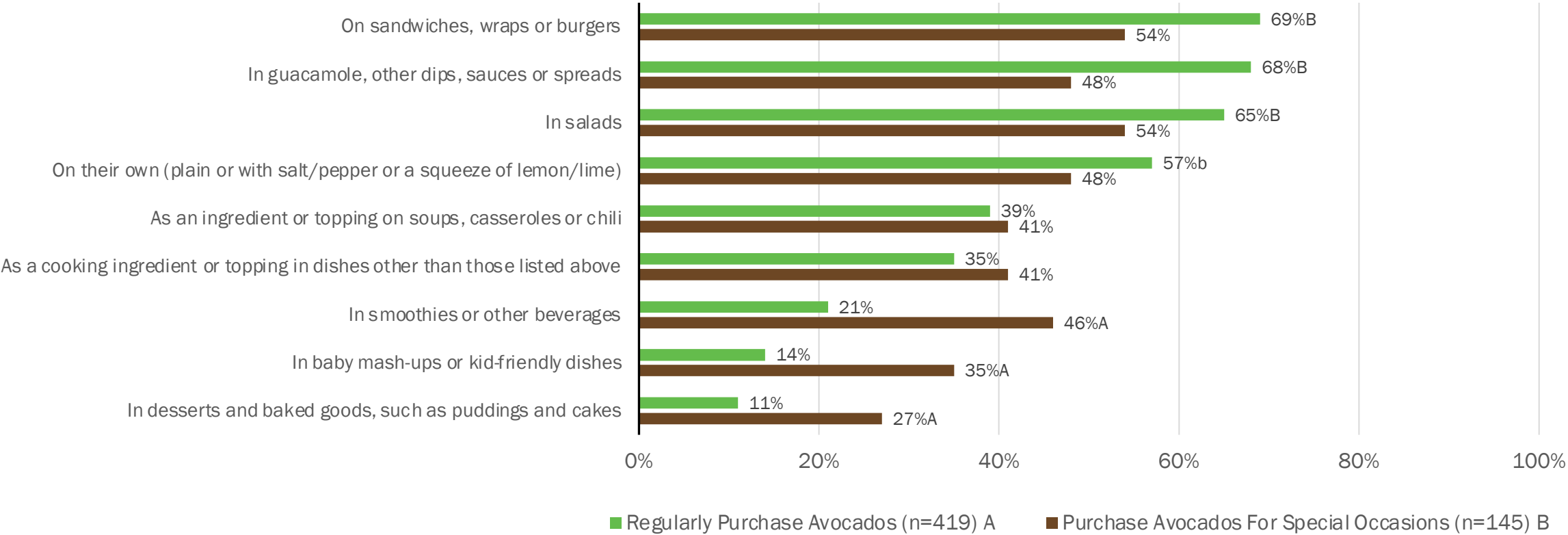
Demographics

As seen last year, 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.



Ways Frequently Consume Avocados

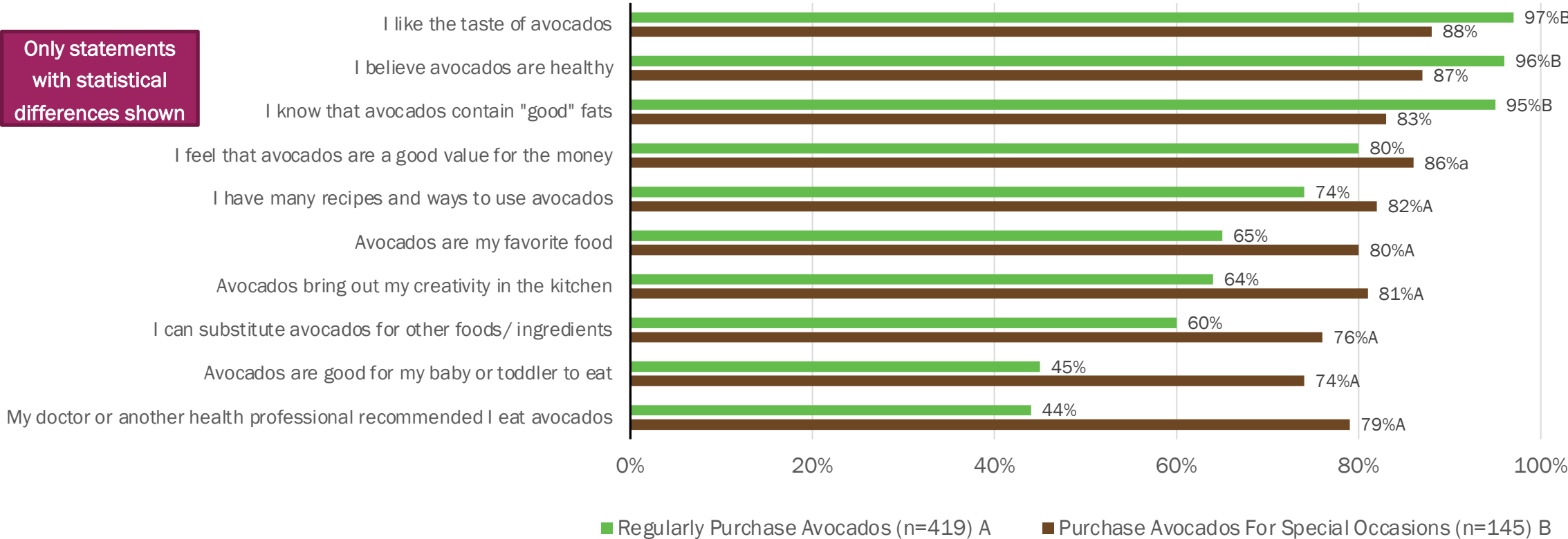
Heavy/super heavy purchasers who claim to primarily purchase avocados for special occasions, still use them multiple ways, but are less likely than regular purchasers to use them for guacamole/dips, sandwiches/burgers, in salads and on their own.



Reasons For Purchasing Avocados

(5 or 4 On a 5-point Scale)

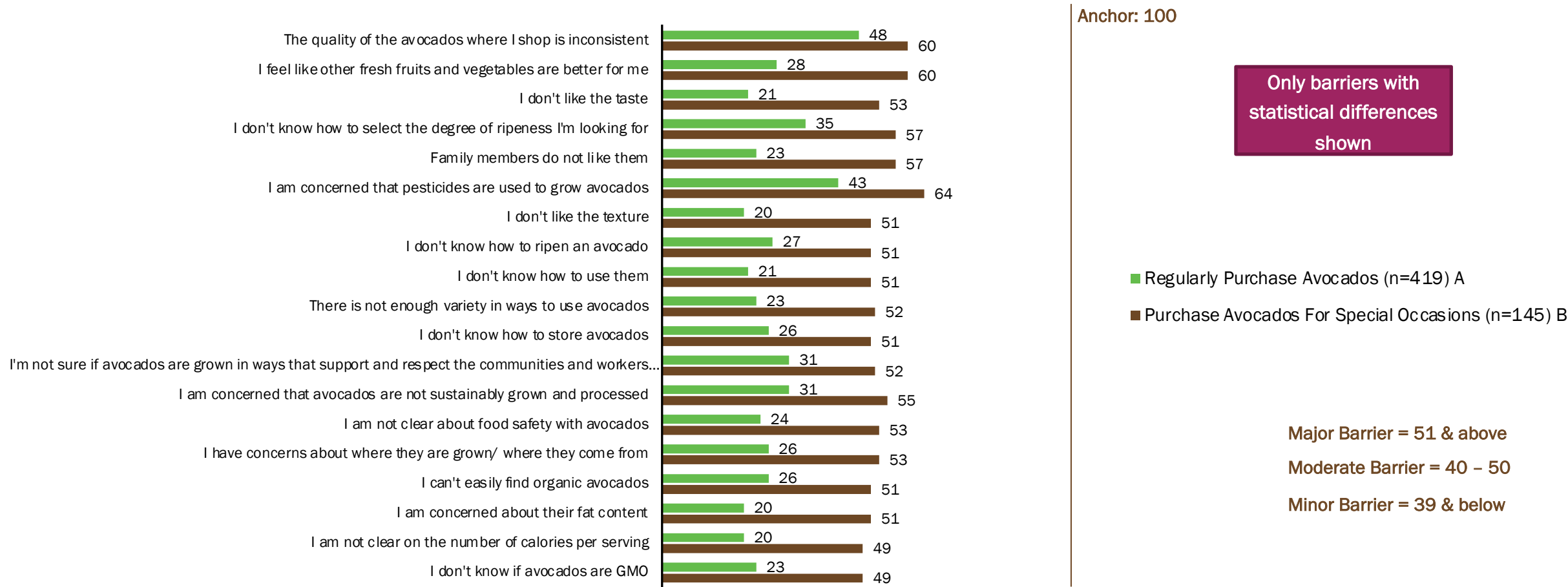
There are numerous differences in why each group purchases avocados. Regular purchasers skew more toward health benefits while special occasion purchasers skew toward variety and creativity.



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.

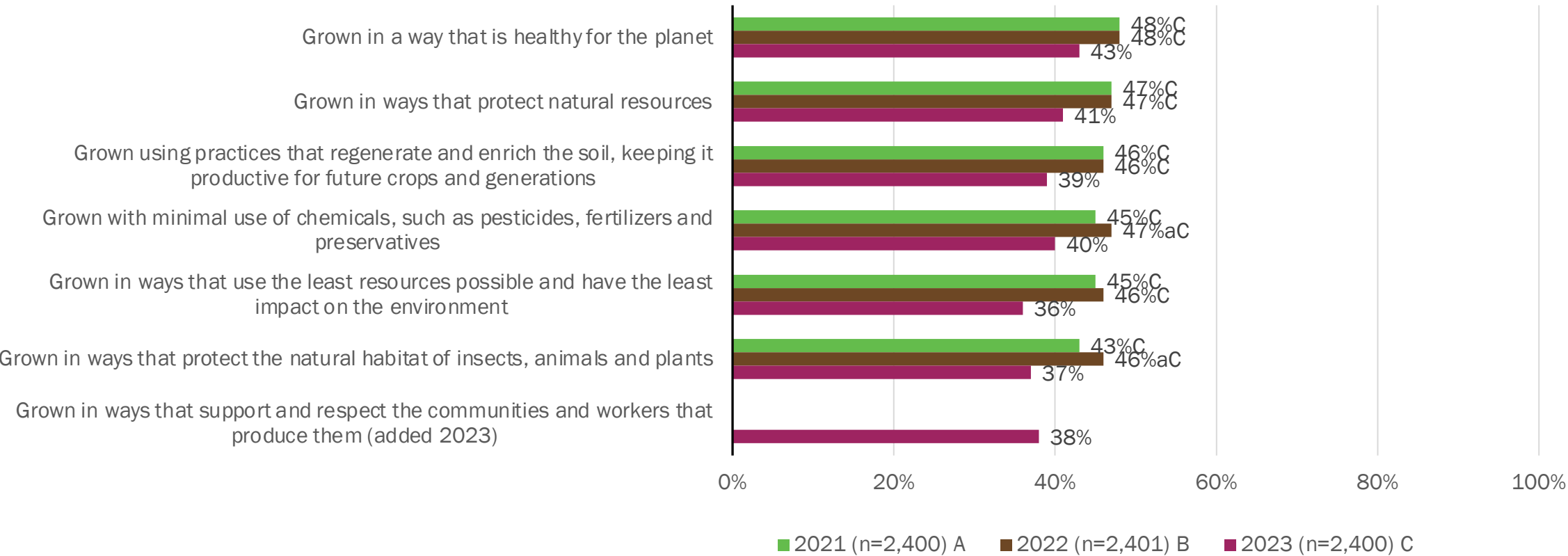


Sustainability

Sustainability Statements Associated With Avocados

(5 or 4 On a 5-point Scale) (Total Sample)

Avocados have a moderate to low association overall with good sustainability practices. This has decreased compared to recent years.



Sustainability Statements Associated With Avocados

(5 or 4 On a 5-point Scale)

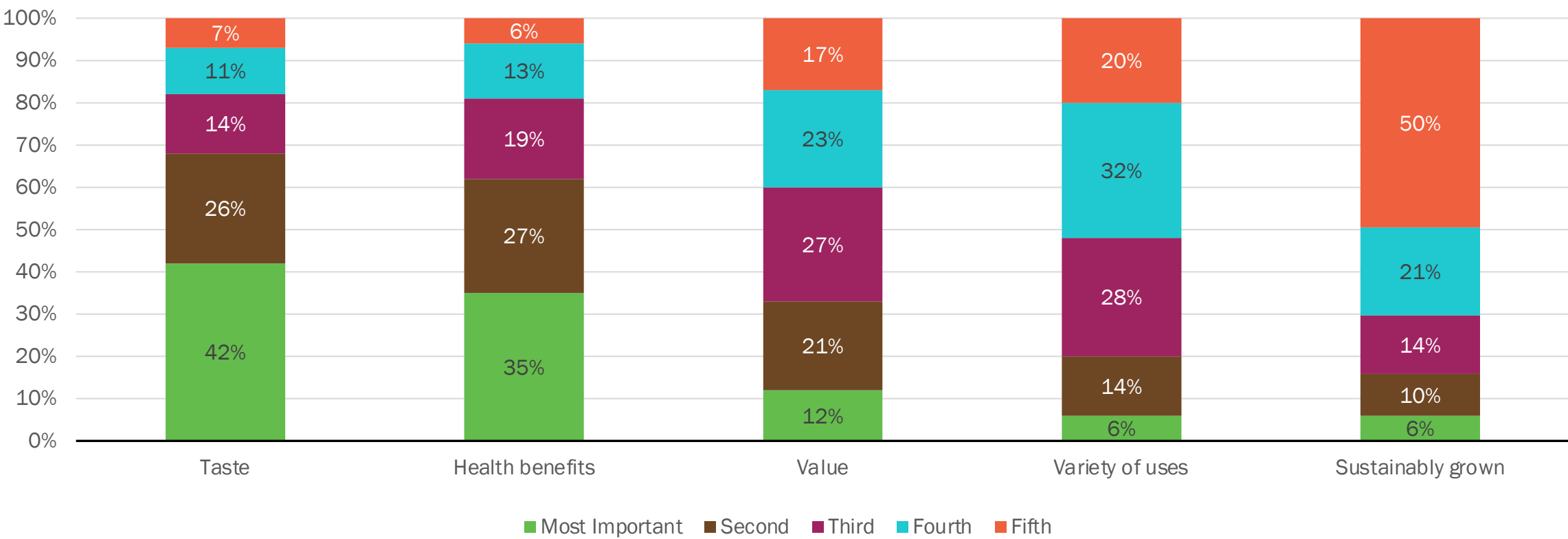
Avocados have much stronger association with good sustainability practices among Heavy and Super Heavy avocado purchasers.

	Total Purchasers (n=1,628) %	Non-Purchasers (n=780) % A	Light (n=531) % B	Medium (n=412) % C	Heavy (n=351) % D	Super Heavy (n=326) % E
Grown in a way that is healthy for the planet	50	27	33A	51AB	63ABC	64ABC
Grown in ways that protect natural resources	48	24	30A	50AB	61ABC	63ABC
Grown with minimal use of chemicals, such as pesticides, fertilizers and preservatives	48	23	35A	50AB	58ABC	55ABc
Grown using practices that regenerate and enrich the soil, keeping it productive for future crops and generations	46	23	29A	47AB	60ABC	59ABC
Grown in ways that support and respect the communities and workers that produce them	45	23	29A	46AB	57ABC	58ABC
Grown in ways that protect the natural habitat of insects, animals and plants	45	20	28A	46AB	59ABC	56ABC
Grown in ways that use the least resources possible and have the least impact on the environment	43	21	26A	45AB	54ABC	56ABC

Importance Ranking of Avocado Attributes

(Total Sample) (2023)

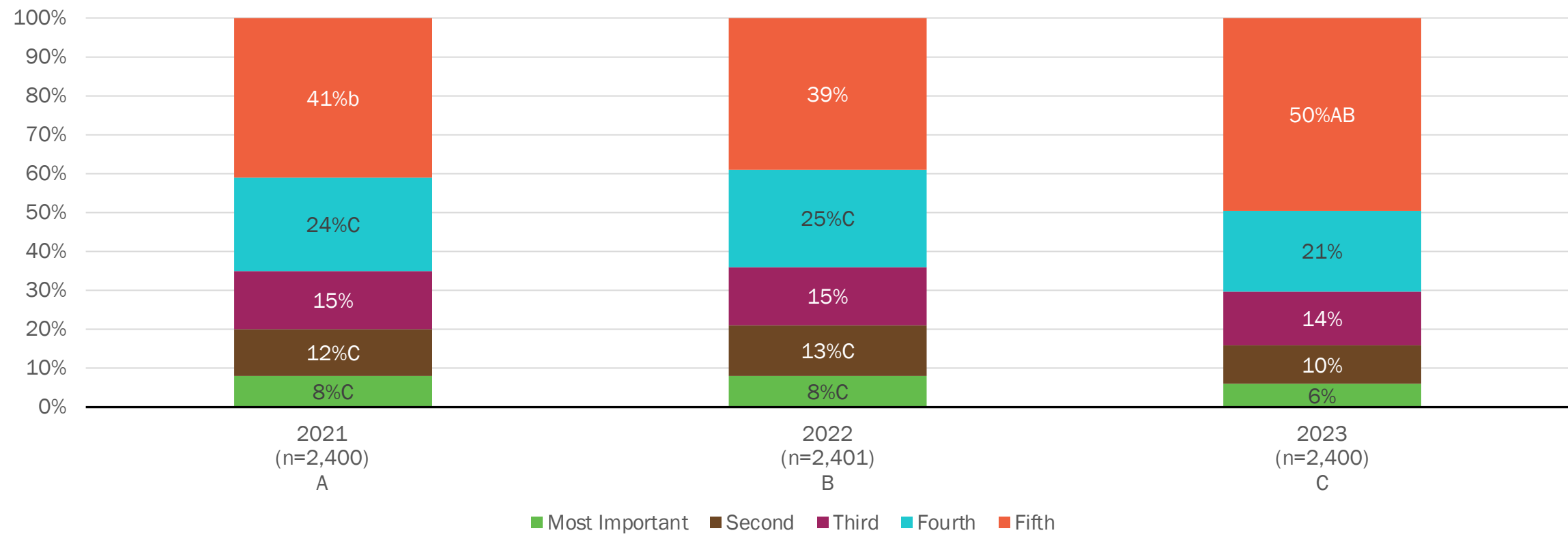
As seen before, taste and health benefits of avocados dominate overall. Sustainably grown is least important.



Importance Ranking of Sustainably Grown

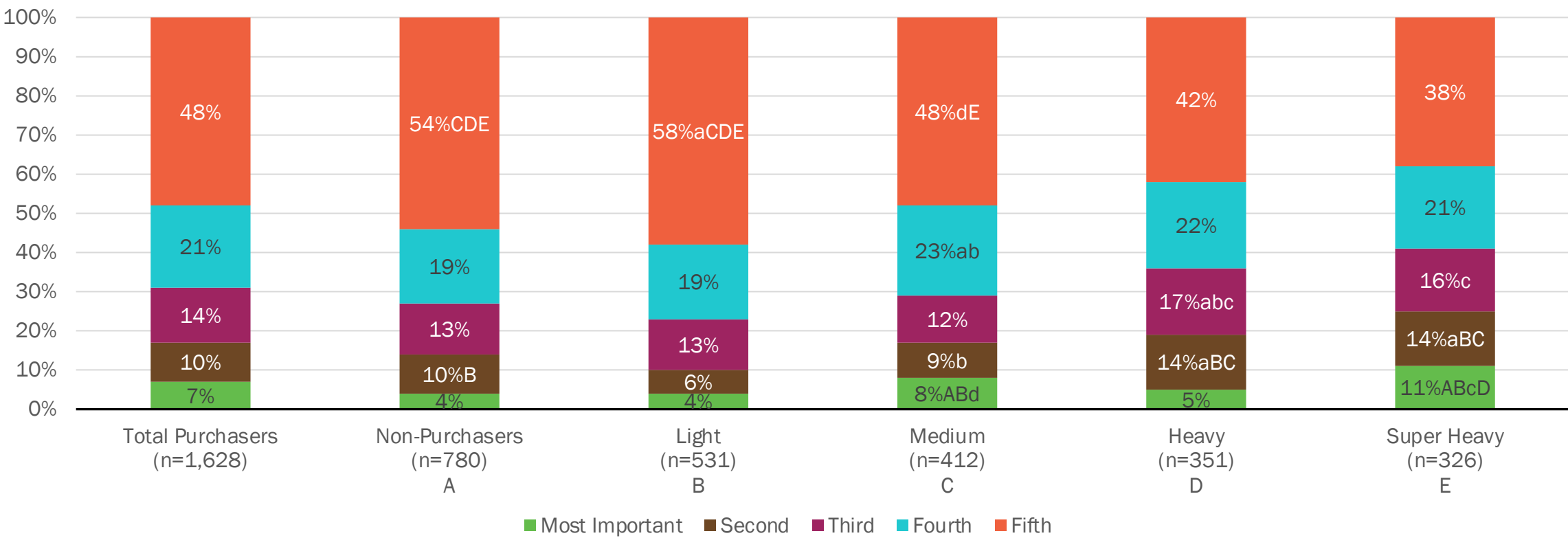
(Total Sample)

The importance of avocados being sustainably grown has decreased compared to recent years.



Importance Ranking of Sustainably Grown (2023)

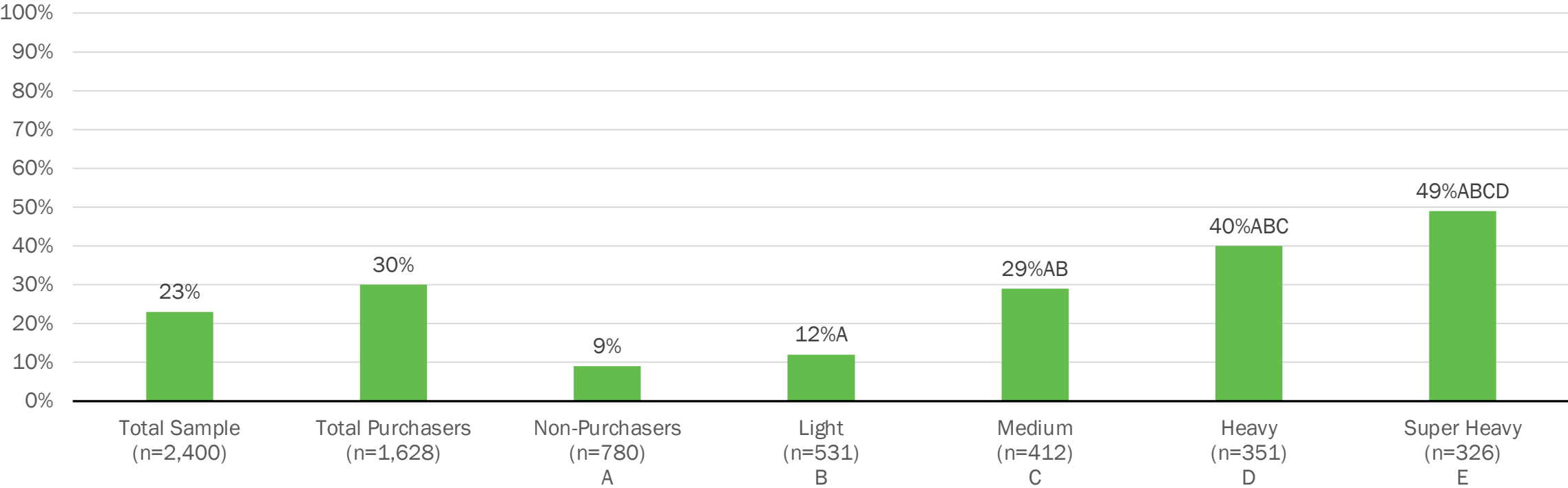
While still low, the importance of avocados being sustainably grown increases with increased avocado purchase levels.



Communications

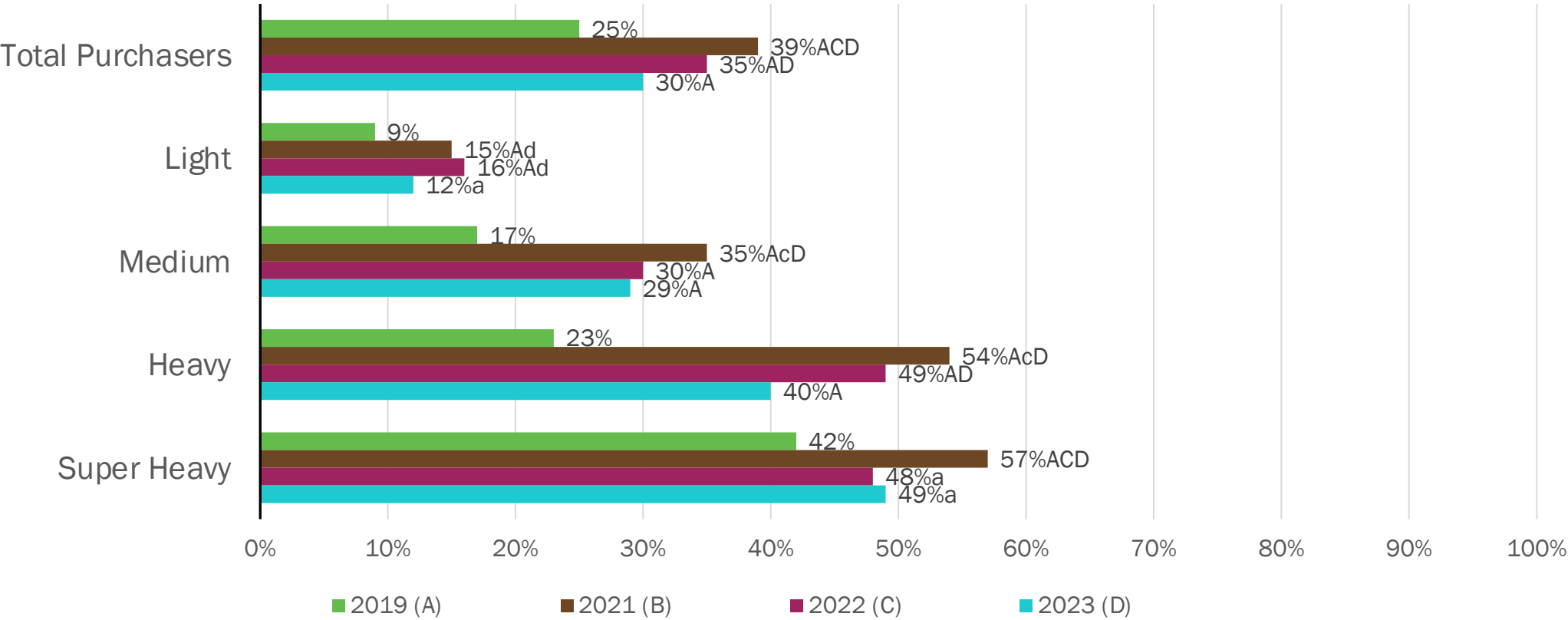
Seen “Love One Today” Logo in Past Year

While there is ample opportunity to grow awareness of the “love one today” logo, it does improve as avocado purchase levels increase.



Seen “Love One Today” Logo in Past Year

Awareness of the “love one today” logo has been decreasing the past 2 years.

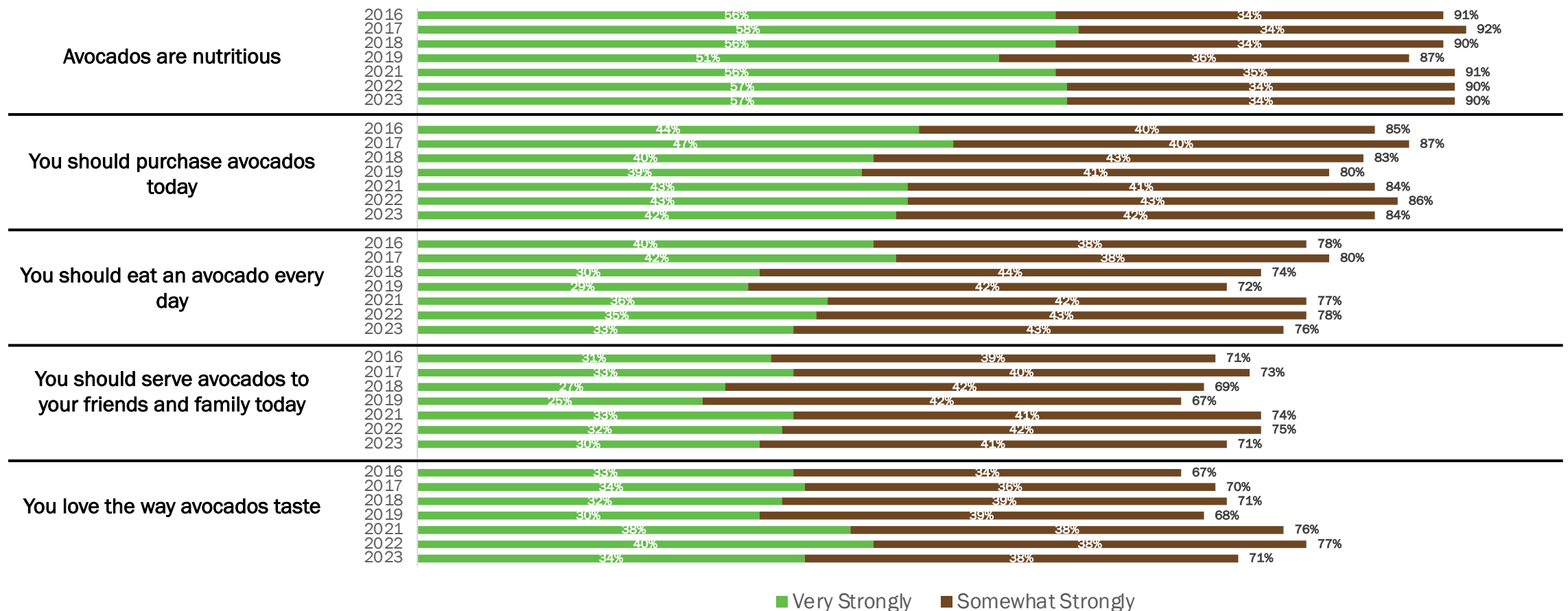


Q400 - In the past year have you seen the following logo, for example, in grocery stores, magazines, newspapers, email or online/social media?

Statements Logo Communicated

(Total Sample)

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



Statements Logo Communicated

(Very Strongly)

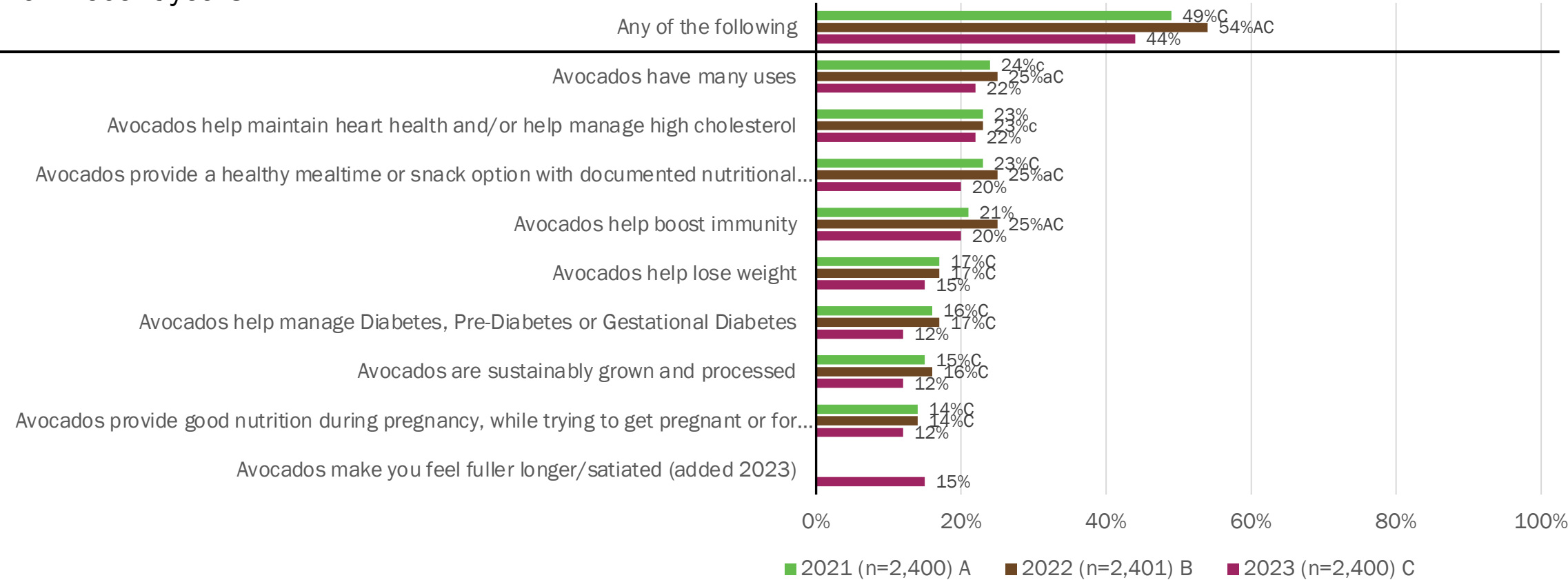
As see before, messages communicated generally increase as avocado purchase levels increase.

	Total Purchasers (n=1,628) %	Non-Purchasers (n=780) % A	Light (n=531) % B	Medium (n=412) % C	Heavy (n=351) % D	Super Heavy (n=326) % E
Avocados are nutritious	64	41	57A	62Ab	70ABC	73ABC
You should purchase avocados today	50	25	39A	49AB	55ABc	63ABCD
You love the way avocados taste	43	15	30A	38AB	53ABC	58ABCd
You should eat an avocado every day	40	17	27A	35AB	55ABC	54ABC
You should serve avocados to your friends and family today	37	14	22A	34AB	45ABC	58ABCD

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 is down from recent years.



Statements About Avocado Benefits Seen or Heard in Past Few Months

The overall decrease in messaging recall about avocados is driven by medium, heavy and super heavy purchasers.

	Non-Purchasers			Light			Medium			Heavy			Super Heavy		
	2021 (n=585) % A	2022 (n=510) % B	2023 (n=666) % C	2021 (n=499) % A	2022 (n=505) % B	2023 (n=531) % C	2021 (n=418) % A	2022 (n=421) % B	2023 (n=412) % C	2021 (n=440) % A	2022 (n=518) % B	2023 (n=351) % C	2021 (n=360) % A	2022 (n=355) % B	2023 (n=326) % C
Any of the following:	21	23	23	35	36	37	59C	63C	52	77C	79C	68	78C	81C	69
Avocados help maintain heart health and/or help manage high cholesterol	9	11a	10	18	15	18	28	29	30	32	33	34	38bc	32	33
Avocados help lose weight	7	8	8	10	10	11	21	19	17	27c	24	22	31c	28	25
Avocados help manage Diabetes, Pre-Diabetes or Gestational Diabetes	7b	5	7b	8	10c	8	15	18	15	27c	26c	21	33C	30C	21
Avocados provide good nutrition during pregnancy, while trying to get pregnant or for newborns up to 24 months old	4	5	6a	8	7	7	14	13	14	24	25	22	31bC	26	23
Avocados provide a healthy mealtime or snack option with documented nutritional benefits	8	10a	11a	17	18	18	26	27	24	35	36c	31	39c	39c	33
Avocados have many uses	9	11	10	17	19	17	27	28	28	38	35	34	39	44C	36
Avocados are sustainably grown and processed	5	4	5	8	10c	7	15	17c	13	31C	27C	21	27	26	25
Avocados help boost immunity	9	8	10b	13	18AC	12	22	29A	27a	33	38a	34	37	38c	33
Avocados make you feel fuller longer/satiated (added 2023)	NA	NA	7	NA	NA	11	NA	NA	20	NA	NA	24	NA	NA	28

Statements About Avocado Benefits Seen or Heard in Past Few Months

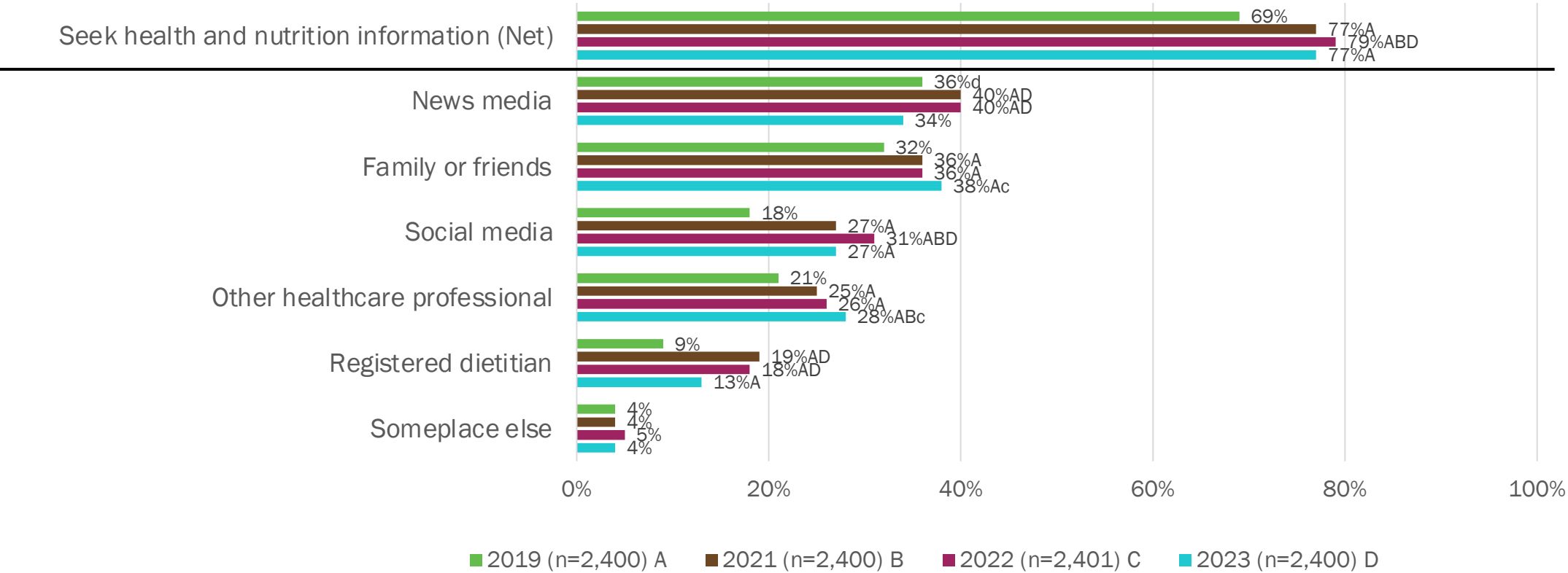
As avocado purchases increase, so does recall of the various messages about avocados. Message recall is similar between Heavy and Super Heavy purchasers.

	Total Purchasers (n=1,628) %	Non-Purchasers (n=780) % A	Light (n=531) % B	Medium (n=412) % C	Heavy (n=351) % D	Super Heavy (n=326) % E
Any of the following:	54	23	37A	52AB	68ABC	69ABC
Avocados have many uses	27	10	17A	28AB	34ABc	36ABC
Avocados help maintain heart health and/or help manage high cholesterol	27	10	18A	30AB	34ABc	33AB
Avocados help boost immunity	25	10	12a	27AB	34ABC	33ABc
Avocados provide a healthy mealtime or snack option with documented nutritional benefits	25	9	18A	24AB	31ABC	33ABC
Avocados make you feel fuller longer/satiated	19	6	11A	20AB	24ABc	28ABC
Avocados help lose weight	18	7	11A	17AB	22ABc	25ABC
Avocados help manage Diabetes, Pre-Diabetes or Gestational Diabetes	15	6	8	15AB	21ABC	21ABc
Avocados provide good nutrition during pregnancy, while trying to get pregnant or for newborns up to 24 months old	15	5	7a	14AB	22ABC	23ABC
Avocados are sustainably grown and processed	15	5	7a	13AB	21ABC	25ABC

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.



Statements About Avocado benefits Seen or Heard in Past Few Months

While registered dietitians are one of the lower sources of information about health-related benefits of avocados, messaging comes through strong from this source. Social media is stronger in terms of reach and also delivers strong messaging.

Health and nutrition information is typically found from:	Registered Dietitian (n=315)	Other Healthcare Professional (n=666)	Social Media (n=637)	News Media (n=820)	Family or Friends (n=900)	Someplace Else (n=104)
	%	%	%	%	%	%
	A	B	C	D	E	F
Any of the following:	70BDEF	48F	69BDEF	56BF	53BF	26
Avocados help boost immunity	39BcDEF	23F	35BDEF	27BF	26BF	11
Avocados help maintain heart health and/or help manage high cholesterol	37BDEF	26F	35BDEF	31BEF	28F	17
Avocados have many uses	37BDEF	24f	34BDEF	30BeF	28BF	17
Avocados provide a healthy mealtime or snack option with documented nutritional benefits	33BdeF	25f	34BDEF	29BF	28BF	17
Avocados make you feel fuller longer/satiated	32BcDEF	17F	27BDEF	20bF	21BF	9
Avocados help lose weight	30BcDEF	18F	25BDEF	18F	19F	9
Avocados provide good nutrition during pregnancy, while trying to get pregnant or for newborns up to 24 months old	27BCDEF	15F	22BDEF	17F	17F	4
Avocados help manage Diabetes, Pre-Diabetes or Gestational Diabetes	26BCDEF	17F	21BDEF	18eF	16F	5
Avocados are sustainably grown and processed	25BDEF	13F	22BDEF	17BF	16bF	5

Where Health and Nutrition Information is Typically Sought

There is a correlation with increased avocado purchases and seeking health and nutrition information.

	Total Purchasers (n=1,628) %	Non-Purchasers (n=780) % A	Light (n=531) % B	Medium (n=412) % C	Heavy (n=351) % D	Super Heavy (n=326) % E
Seek health and nutrition information (Net)	83	64	75A	83AB	89ABC	89ABC
Family or friends	42	29	36A	41Ab	47ABc	45ABc
News media	38	26	35A	40Ab	39A	40Ab
Other healthcare professional	29	24	27	33ABe	30A	29a
Social media	31	17	21a	31AB	40ABC	40ABC
Registered dietitian	16	7	8	16AB	23ABC	20ABc
Someplace else	5	4	6ad	4	4	5

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=1,628) %	Non- Purchasers (n=780) % A	Light (n=531) % B	Medium (n=412) % C	Heavy (n=351) % D	Super Heavy (n=326) % E
Use Social Networks (Net)	92	82	88A	91Ab	96ABC	95ABC
Less than 30 minutes	12	14DE	16DE	15DE	7	7
31-60 minutes	13	14E	17aCE	12e	14E	8
1-2 hours	15	14	13	17aB	17b	16b
2-3 hours	13	9	13A	14A	12a	15A
3-4 hours	11	8	10	10	13A	12A
More than 4 hours	27	23	20	23	34ABC	37ABC

Social Media Network Use Most

Facebook continues to dominate 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=1,628) %	Non- Purchasers (n=780) % A	Light (n=531) % B	Medium (n=412) % C	Heavy (n=351) % D	Super Heavy (n=326) % E
Facebook	47	55bCDE	51DE	48e	44	43
YouTube	18	14	17a	18A	18a	21Ab
Instagram	11	5	8a	11AB	14AB	15ABc
TikTok	5	2	5A	5A	7Abc	5a
Twitter	5	2	2	3	9ABC	8ABC
Pinterest	2	2	2e	3ae	2	1
LinkedIn	1	1	2a	1	1	2
Other	1	1	2ae	1	1	1



Thank you!

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