



AVOCADOS TRACKING 2021 | HISPANIC ACCULTURATION REPORT

AGENDA

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INTRODUCTION

BACKGROUND AND OBJECTIVES

Background:

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

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



Objectives:

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

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

WHAT WE DID

Who:

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

Notes:

- Due to significant changes last year, only limited measures are trended
- This report explores Hispanic acculturation levels. The survey was offered in both English and Spanish. As seen last year, 74% completed it in Spanish.
- The final sample consisted of the following acculturation levels:
 - 10% High
 - 53% Medium
 - 37% Low
- Selected measures are contrasted with the non-Hispanic sample from the general study.

How Many and When:

1,200 surveys were completed per wave

2018: July 23rd – August 3rd, 2018

2019: May 14th – May 27th, 2019

2021: June 1st – June 20th, 2021

How:

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

Report Notes

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

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

EXECUTIVE SUMMARY

WHAT'S NEW IN 2021

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

- The high acculturation group is younger than we have seen in the past. They are less likely to be of Mexican heritage and are less likely to be U.S. born than we have seen in the past. They were the group using avocados in more ways and for more occasions. Now, they are generally outpaced by the medium acculturation group.
- Using avocados for breakfast is up this year.
- While the two nutrient attributes remain of top importance when purchasing fresh fruits and vegetables, pesticide concerns have become more important. Pesticides were already an issue for the medium and low acculturation groups, but now it is also of high importance for the high acculturation group.
- Avocados continue to perform well against the important health and nutrition attributes except for helping to manage blood pressure – driven by lower scores among the high and low acculturation groups. The score for helping with blood pressure has always been somewhat low, but now it has slipped below the minimally acceptable level.
- Frequently being too expensive, remains a top purchase barrier, but it is back to 2018 levels after seeing an increase as a barrier in 2019. Pesticide and sustainability concerns have grown as barriers.
- Awareness of the “Love One Today” logo, which has decreased in 2019, is back up to 2018 levels.

EXECUTIVE SUMMARY

Avocado Purchase and Usage

- 93% of the Hispanic sample are avocado purchasers – compared to 71% of the general sample).
 - Avocado purchase levels do skew higher among the medium and low acculturation groups.
- Avocado usage occasions generally skew higher among the Hispanic sample except for snacking, which is higher among the general sample.
- Avocados are used across a variety of meal occasions, with usage for breakfast up compared to 2019.
- As with the general sample, guacamole/dip, salads and sandwiches/wraps/burger are the top ways avocados are used. Eaten plain is also a top use among Hispanics.
- Agreement with the various reasons for purchasing avocados is strong. Top reasons are being healthy, liking the taste, good fats, the family loves them, liking the texture, and helping to provide nutritious meals.
 - The medium acculturation group generally agrees with more reasons for purchasing avocados.

EXECUTIVE SUMMARY (CONT.)

Purchase Drivers and Avocado Delivery/Barriers

- The top two purchase decision drivers are being nutrient dense with a lot of vitamins and minerals and being a source of many important nutrients – the same as seen in 2019 and as seen among the general sample.
 - These are the top two drivers across all acculturation levels.
- Avocados have strong perceived delivery against all of the most important attributes except helping to manage blood pressure.
- Top barriers to purchasing avocados are similar to the general sample: frequently too expensive (which is back down from 2019, but still top of the list among Hispanics this year), pesticide concerns (up this year), and turning brown too quickly.
 - The top barriers are consistent across acculturation groups.

EXECUTIVE SUMMARY (CONT.)

Communication

- 45% (up from 36% in 2019 which was a decrease from 43% in 2018) of all respondents claim to have seen “Love One Today” within the past year – much stronger than the 31% seen among the general sample.
 - Message communication associated with the logo is strong.
- Hispanics are much more likely than the general sample to claim recalling health related information about avocados (84% vs. 49%).
- Most Hispanics seek health and nutrition information.
 - As seen with the general sample, friends and family and the news media are top sources of information. But differing from the general sample, social media is also a top source for Hispanics.

HIGH ACCULTURATION: 10% OF SAMPLE

- 97% (similar to 87% in 2019) of high acculturation Hispanics purchase avocados, and almost three-fifths of them are heavy to super heavy purchasers.
 - Large portions of them fall into the heart health, weight loss and healthy living pillars.
- Their use of avocados across meal occasions is similar to total Hispanics, except for elevated use for snacks. They use avocados many different ways, but not as much as seen for the other acculturation groups.
- They generally agree with most of the reasons for purchasing avocados. Top reasons are being healthy, liking the taste and texture, “good” fats and the family loves them.
- Nutrient dense and a good source of nutrients are the most important benefits when deciding to purchase fresh fruits and vegetables. are the top
 - Avocados perform well against the most important attributes for this pillar.
- Top barriers to avocado purchases are being too expensive and turning brown too quickly. Pesticide concerns has moved up to being a major barrier.
- 86% of them seek health and nutrition information.

MEDIUM ACCULTURATION: 53% OF SAMPLE

- 95% of medium acculturation Hispanics purchase avocados, and almost three-quarters of them are heavy to super heavy purchasers.
 - Large portions of them fall into the heart health, weight loss and healthy living pillars.
- Their use of avocados across meal occasions is almost identical to total Hispanics. They are the most likely group to embrace avocados for breakfast and they use avocados in more different ways than seen for the other acculturation groups.
- They generally agree with most of the reasons for purchasing avocados. Top reasons are being healthy, liking the taste and texture, my family loves them, and “good” fats.
- They consider many of the attributes to be important when deciding to purchase fresh fruits & vegetables. The two nutrient attributes lead.
 - Avocados perform well against the most important attributes for this pillar.
- Top barriers to avocado purchases are being too expensive, pesticide concerns, and turning brown too quickly.
- 92% of them seek health and nutrition information.

LOW ACCULTURATION: 37% OF SAMPLE

- 92% of low acculturation Hispanics purchase avocados, and over two-thirds of them are heavy to super heavy purchasers.
 - Large portions of them fall into the heart health, weight loss and healthy living pillars. Reflecting their demographics, they also skew high in the pre-natal/newborn pillar.
- Their use of avocados across meal occasions is almost identical to total Hispanics, but they do fall a short for snacks and parties/special events. They use avocados in more ways than seen among the high acculturation group but less ways than seen with the middle acculturation group.
- They generally agree with most of the reasons for purchasing avocados. Top reasons are being healthy, liking the taste and texture, my family loves them, “good” fats, and helps me provide nutritious meals.
- They consider many of the attributes to be important when deciding to purchase fresh fruits & vegetables, with the two nutrient attributes of the most importance.
 - Avocados perform well against the most important attributes for this pillar except helping to manage blood pressure.
- Top barriers to avocado purchases are being too expensive, pesticide concerns, and turning brown too quickly.
- 93% of them seek health and nutrition information.

AVOCADO PURCHASER SEGMENTS

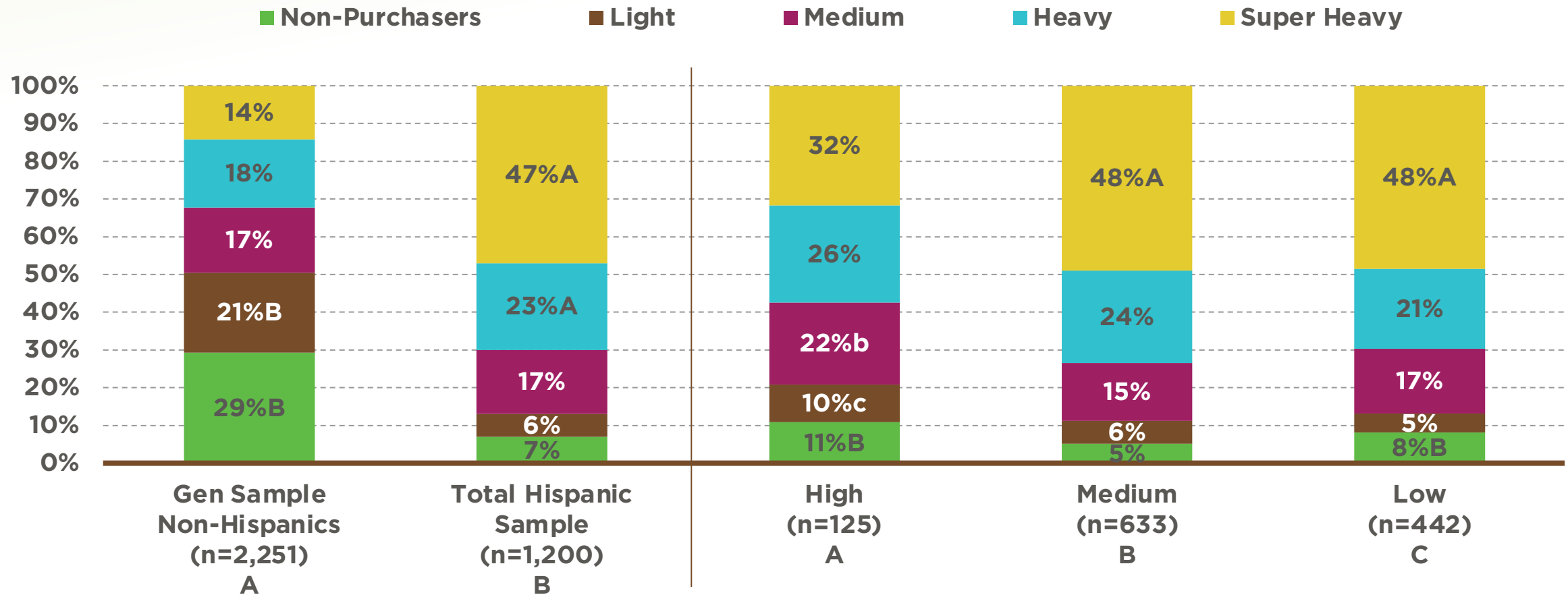
freshavocados



nutrient-dense • heart-healthy

AVOCADO SEGMENT COMPOSITION

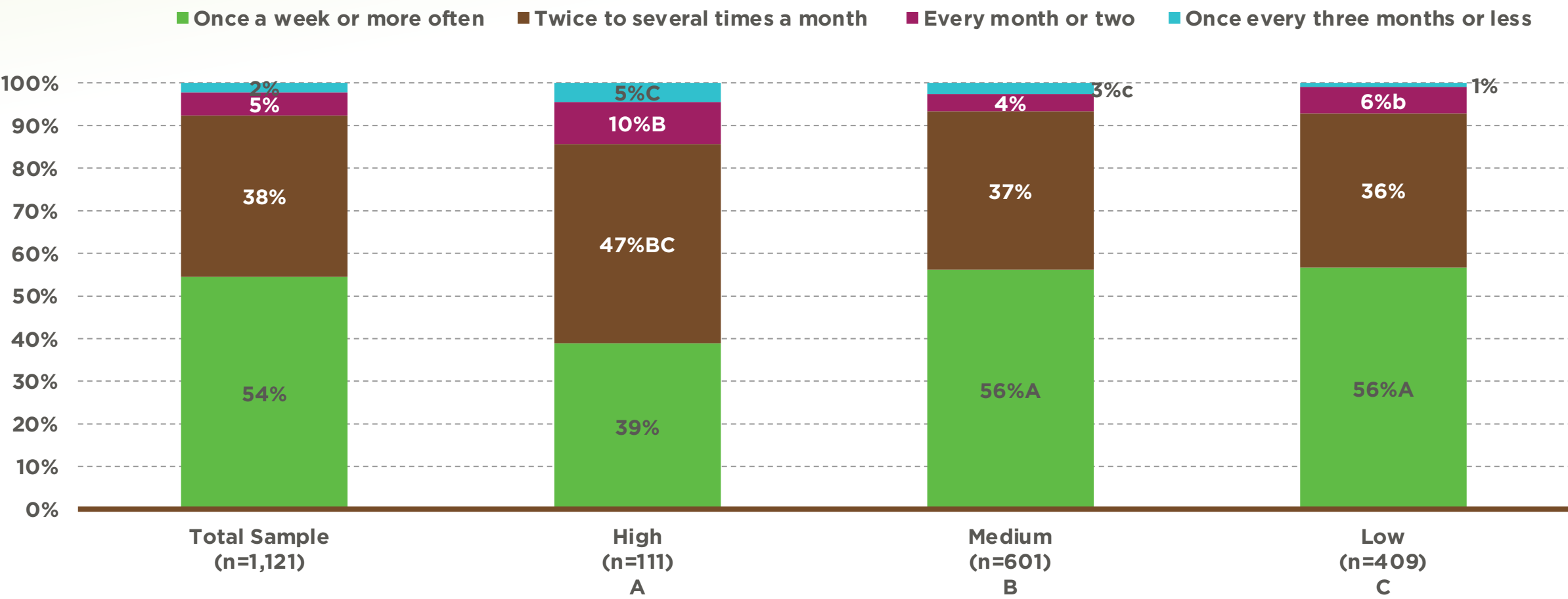
93% OF THE HISPANIC SAMPLE ARE AVOCADO PURCHASERS (COMPARED TO 71% OF GENERAL SAMPLE NON-HISPANICS). TOTAL AVOCADO PURCHASES ARE HIGHER AMONG THE MEDIUM AND LOW ACCULTURATION GROUPS. IN FACT, THE PROPORTION OF AVOCADO PURCHASES AMONG THE HIGH ACCULTURATION GROUP DECREASED FROM 93% TO 87%.



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

FREQUENCY OF BUYING AVOCADOS TO EAT OR SERVE AT HOME

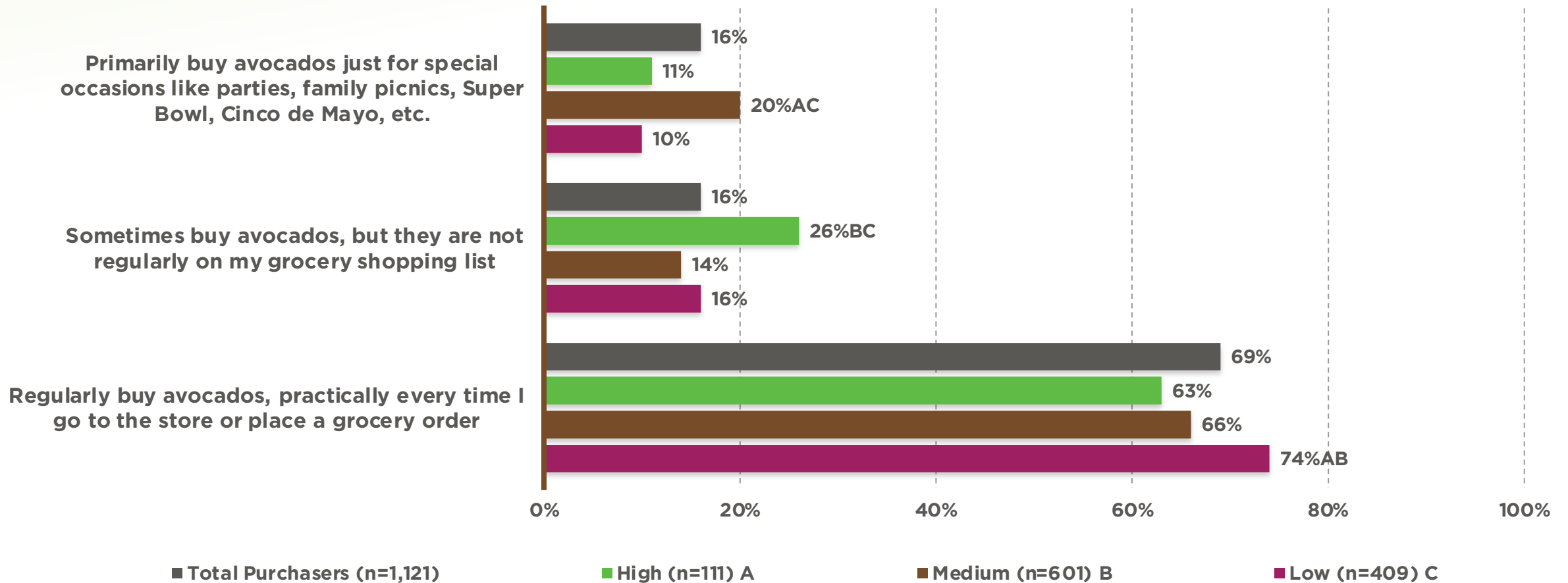
HISPANICS ARE FREQUENT AVOCADO PURCHASERS, AND AS SEEN LAST YEAR, THE FREQUENCY SKEWS HIGHER AMONG THE MEDIUM AND LOW ACCULTURATION GROUPS.



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

AVOCADO PURCHASE PATTERN

HISPANICS PREDOMINATELY PURCHASE AVOCADOS AS PART OF THEIR REGULAR SHOPPING ROUTINE.

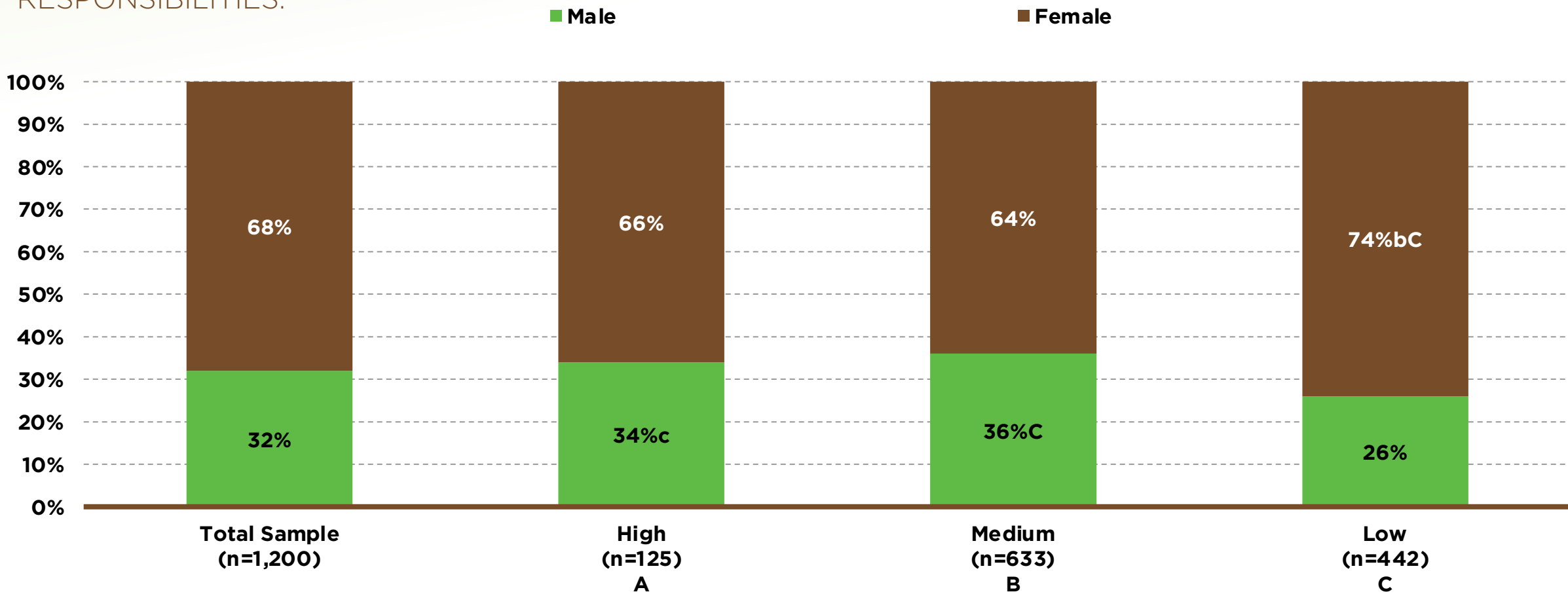


Q133 – Which of the following statements best describes your purchasing of avocados for your household?

PROFILE OF HISPANIC ACCULTURATION GROUPS

GENDER

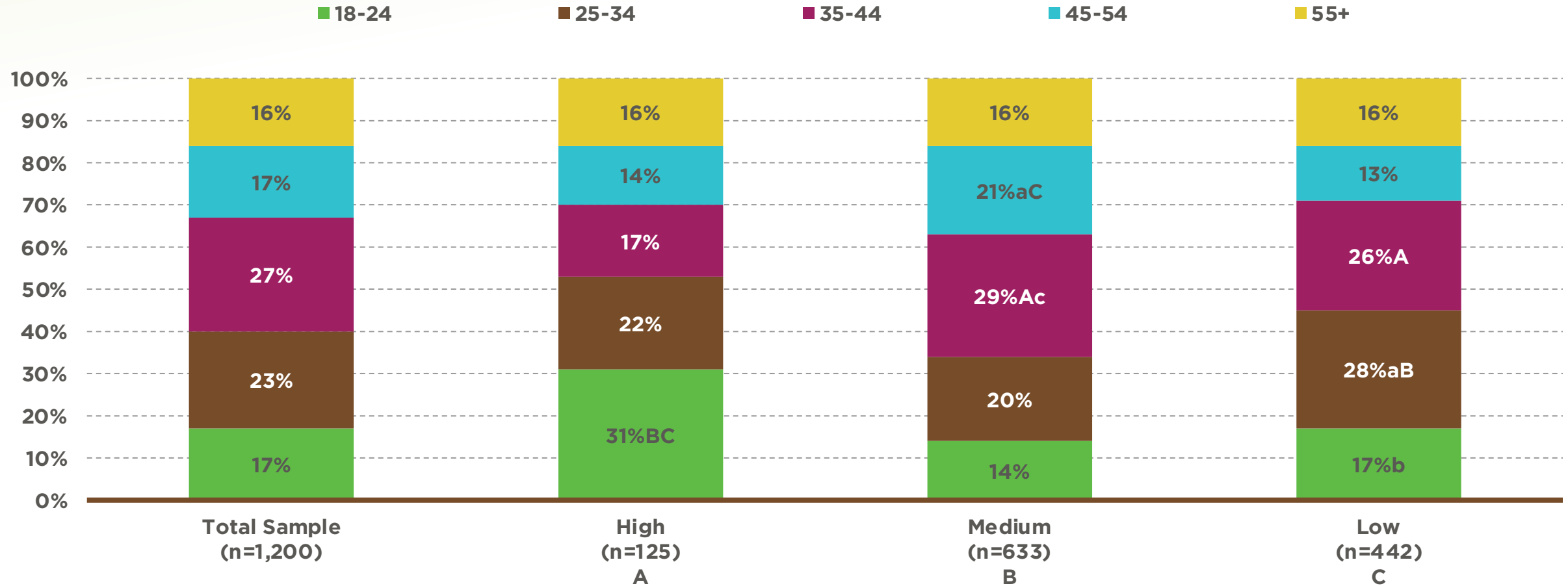
AS SEEN BEFORE, THE LOW ACCULTURATION GROUP SKEWS MORE FEMALE THAN SEEN FOR THE OTHER GROUPS. THIS APPEARS TO REFLECT DIFFERENT HOUSEHOLD GROCERY SHOPPING RESPONSIBILITIES.



S1 – Are you male or female?

AGE

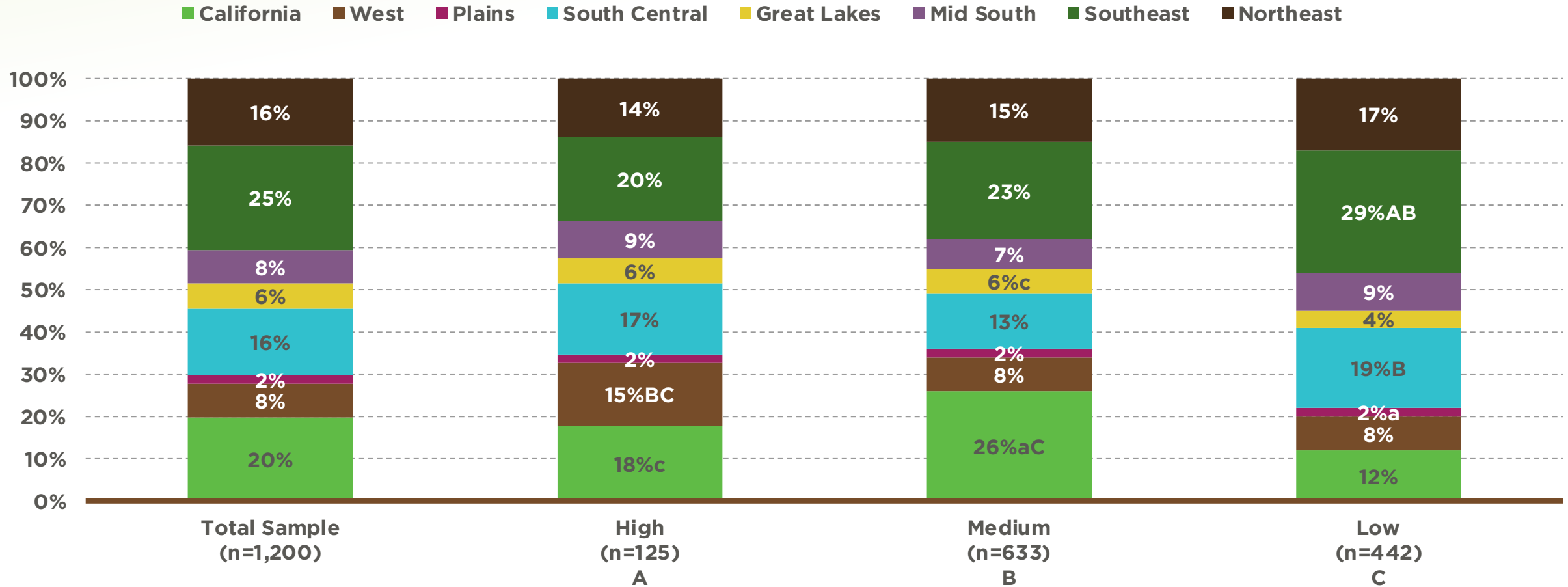
THE HIGH ACCULTURATION GROUP SKEWS YOUNGER THAN THE OTHER TWO GROUPS. THIS IS REVERSE OF WHAT WE USE TO SEE - PERHAPS REFLECTING GENERATIONAL CHANGE.



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

REGION OF RESIDENCE

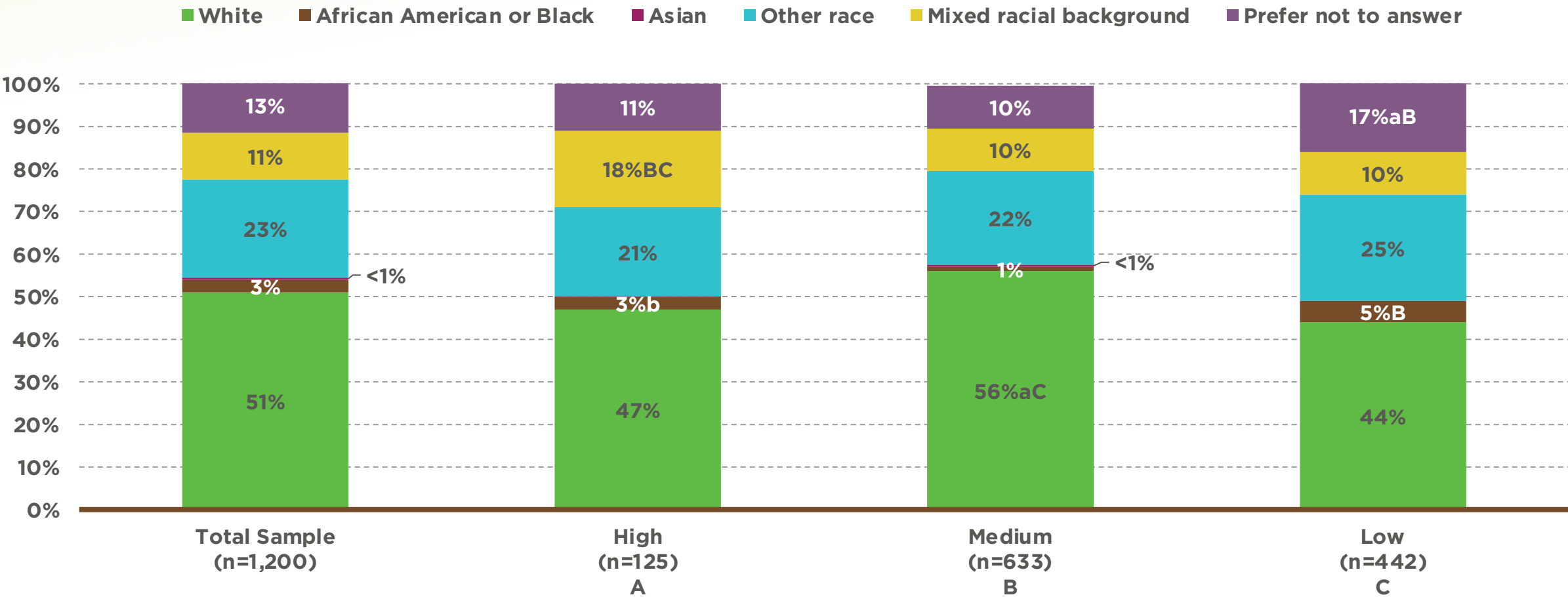
THERE ARE SOME GEOGRAPHIC VARIANCES, PRIMARILY DRIVEN BY A SKEW AWAY FROM CALIFORNIA AMONG THE LOW ACCULTURATION GROUP.



S3 - In what state do you currently reside?

RACE

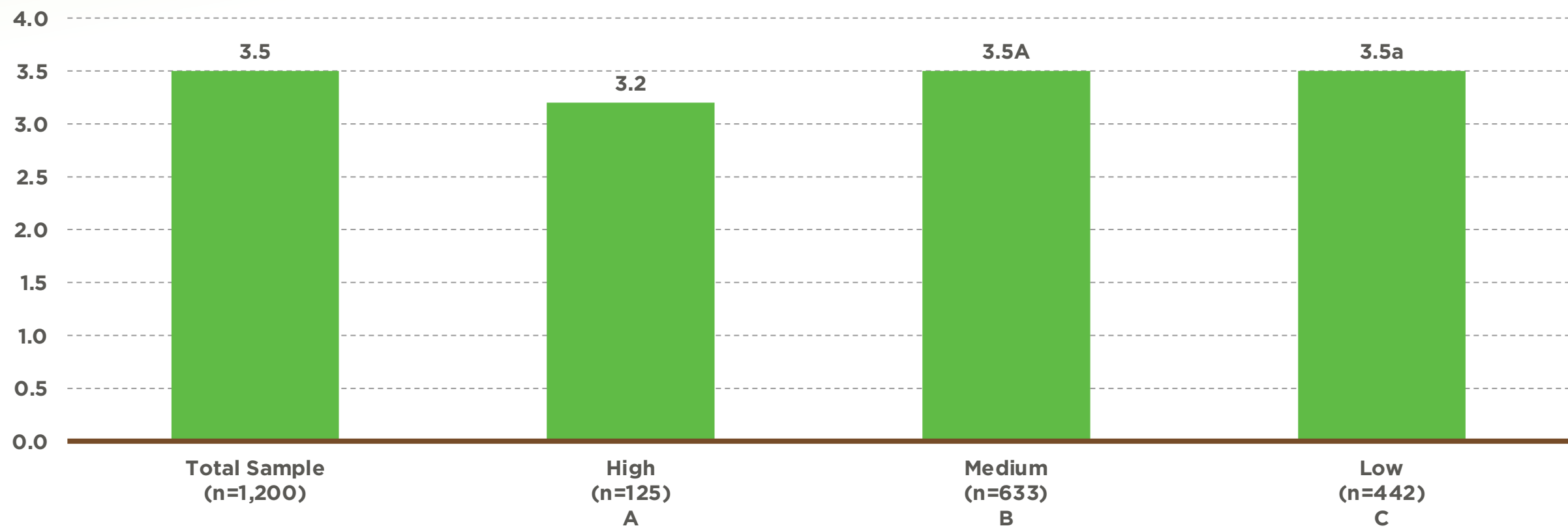
THERE ARE SOME RACIAL DIFFERENCES ACROSS GROUPS, BUT LIKELY A REFLECTION OF HESITANCY IN ANSWERING THIS QUESTION.



S7 – Do you consider yourself...?

AVERAGE NUMBER OF PEOPLE IN HOUSEHOLD

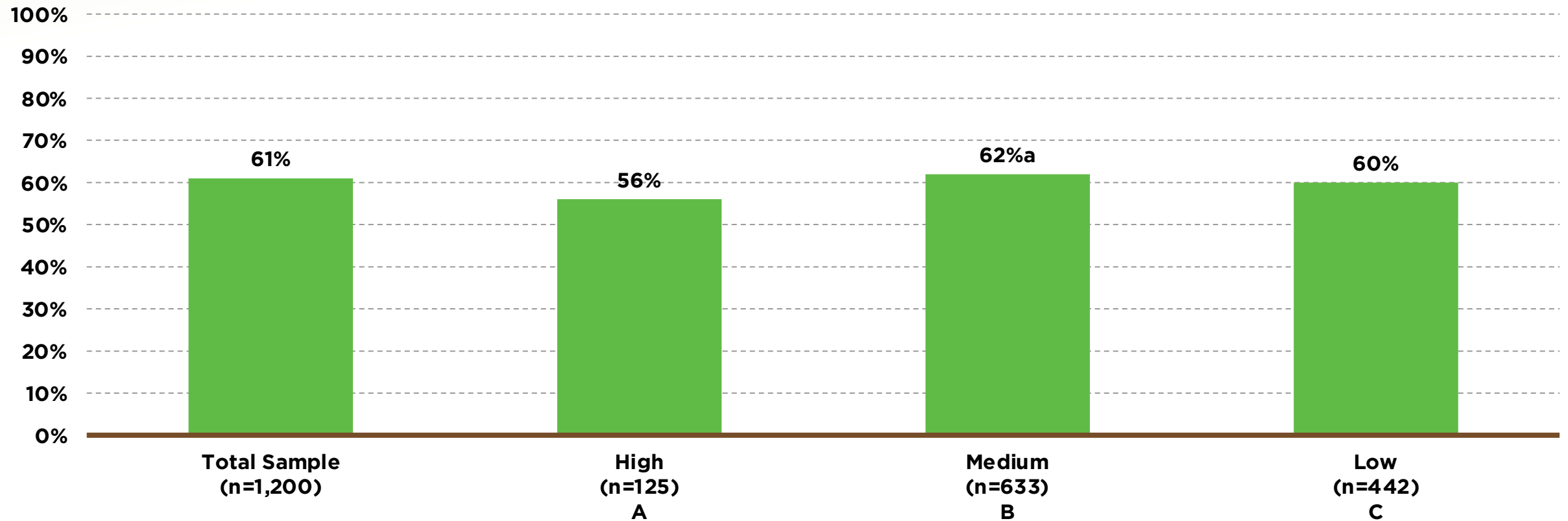
THE AVERAGE HISPANIC HOUSEHOLD IS LARGER THAN WE SAW IN THE GENERAL SAMPLE (3.5 VS. 2.6) AND IT INCREASES SLIGHTLY WITH LESS ACCULTURATION.



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

CHILDREN UNDER 18 LIVING IN HOUSEHOLD

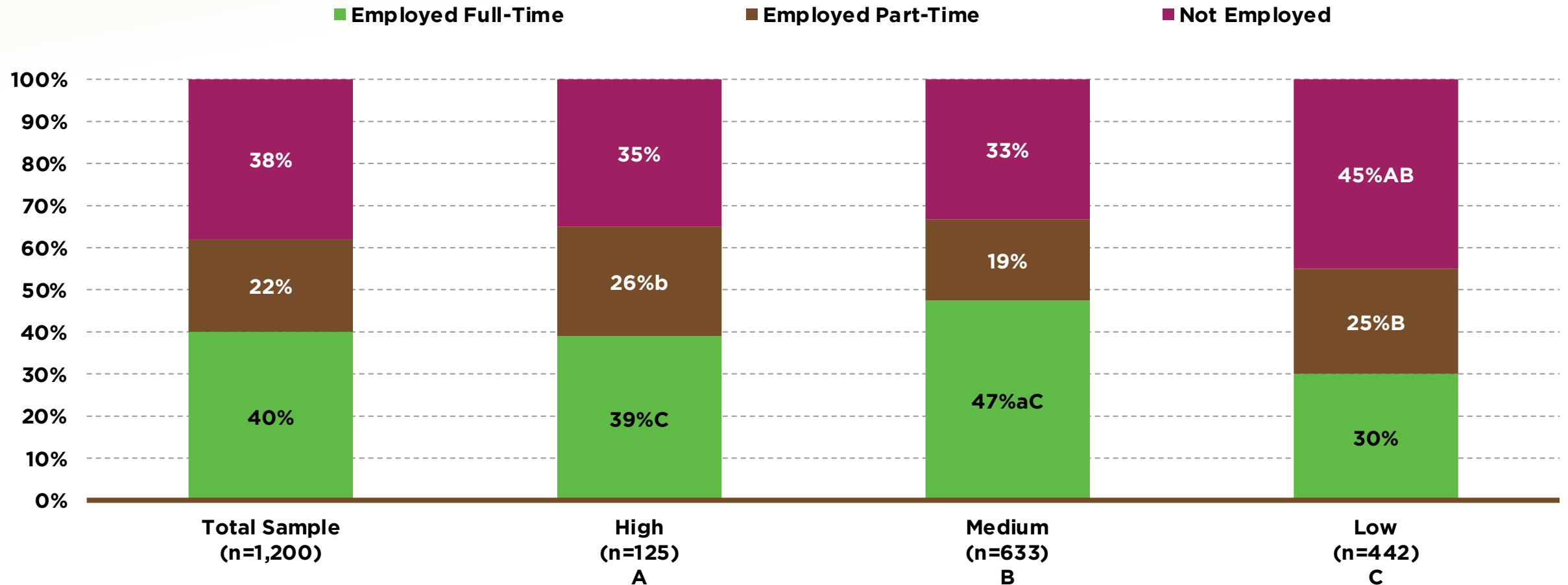
HISPANIC HOUSEHOLDS ARE MUCH MORE THAN THE GENERAL SAMPLE TO HAVE CHILDREN IN THEIR HOME (61% VS. 35%).



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

EMPLOYMENT STATUS

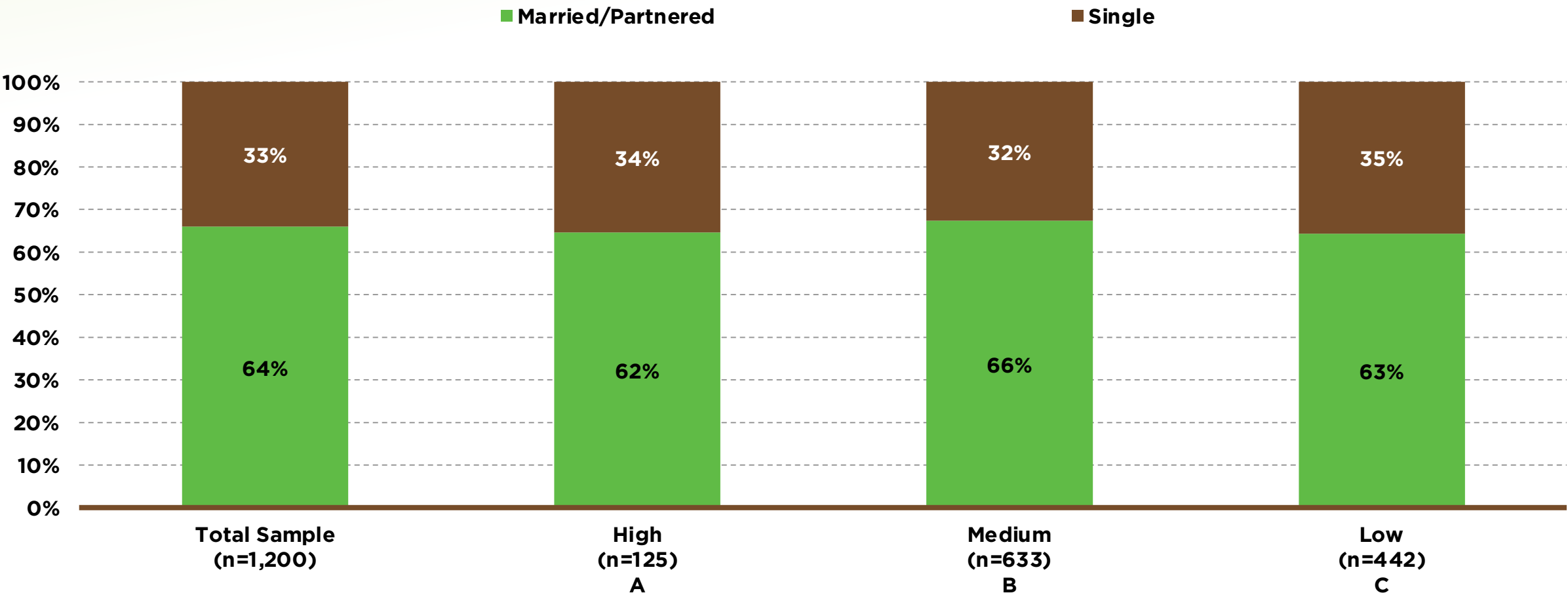
THE HISPANIC SAMPLE IS SIMILAR TO THE GENERAL SAMPLE IN TERMS OF BEING EMPLOYED (62% VS. 58%), BUT EMPLOYMENT SKEWS LOWER AMONG THE LOW ACCULTURATION GROUP.



D4 - Please indicate your employment status?

MARITAL STATUS

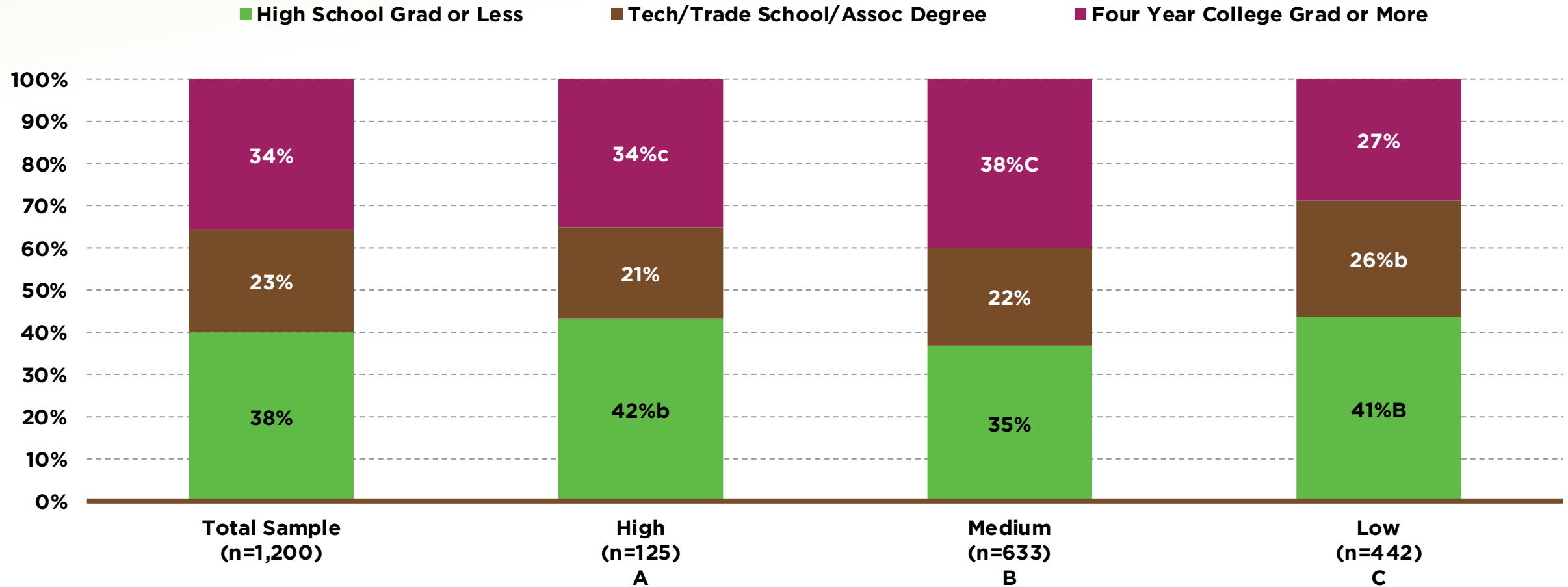
THE HISPANIC SAMPLE IS IN LINE WITH THE GENERAL SAMPLE IN TERMS OF BEING MARRIED/PARTNERED (64% VS. 65%).



D5 - What is your marital status?

EDUCATION LEVEL

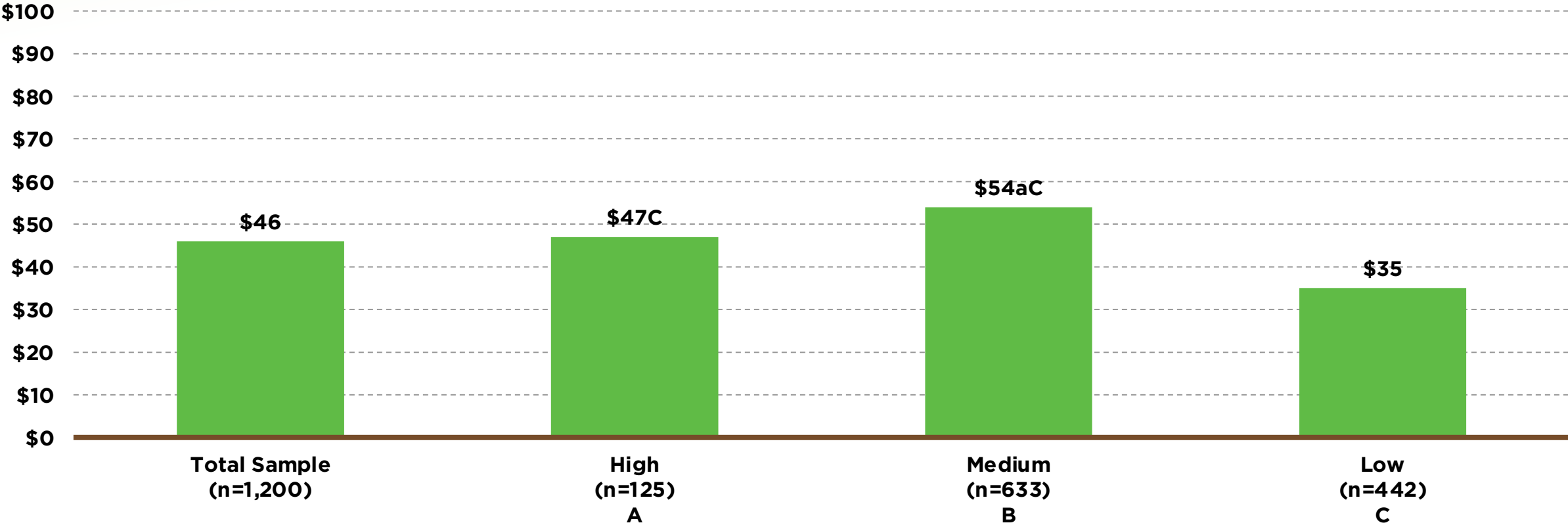
EDUCATIONAL LEVELS SKEW LOWER AMONG THE LOW ACCULTURATION GROUP.



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

TOTAL AVERAGE ANNUAL HOUSEHOLD INCOME (IN 000'S)

HOUSEHOLD INCOME IS HIGHEST AMONG THE MEDIUM ACCULTURATION LEVEL.



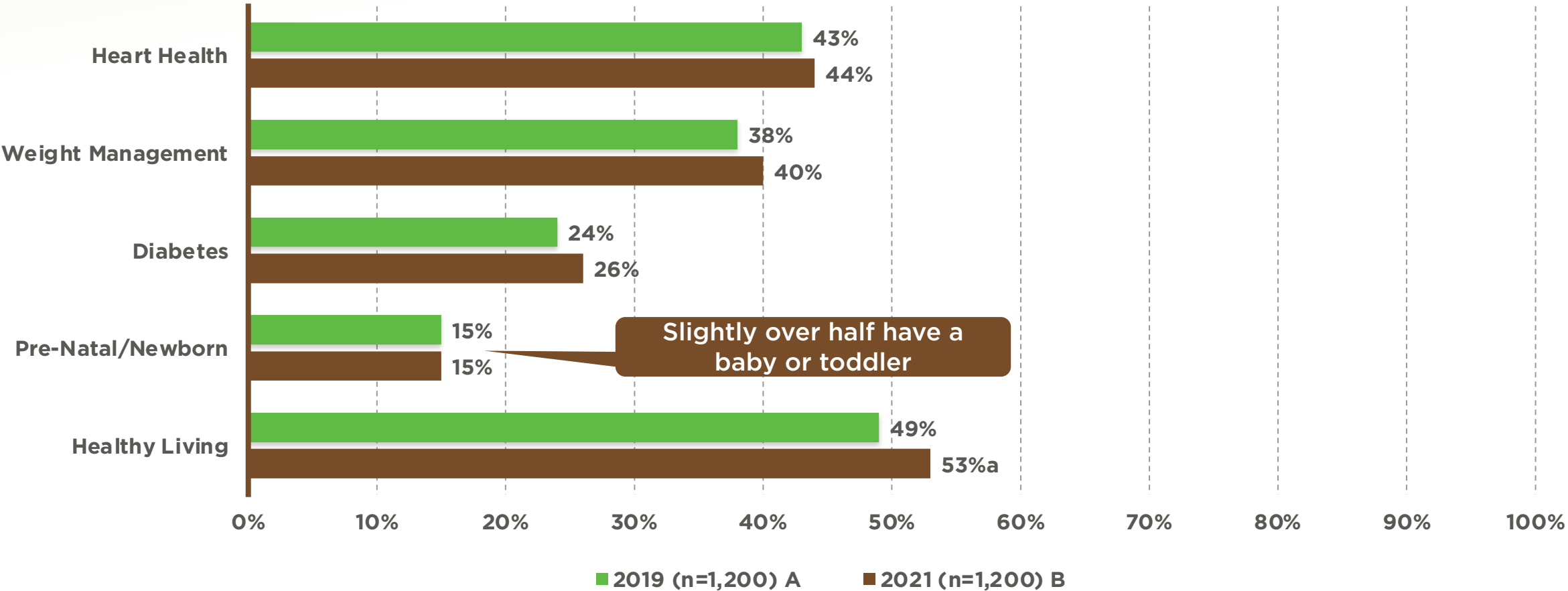
D7 - Which of the following income categories best describes your total [INSERT LAST YEAR] household income before taxes?

HEALTH AND WELLNESS PILLARS

(TOTAL SAMPLE)

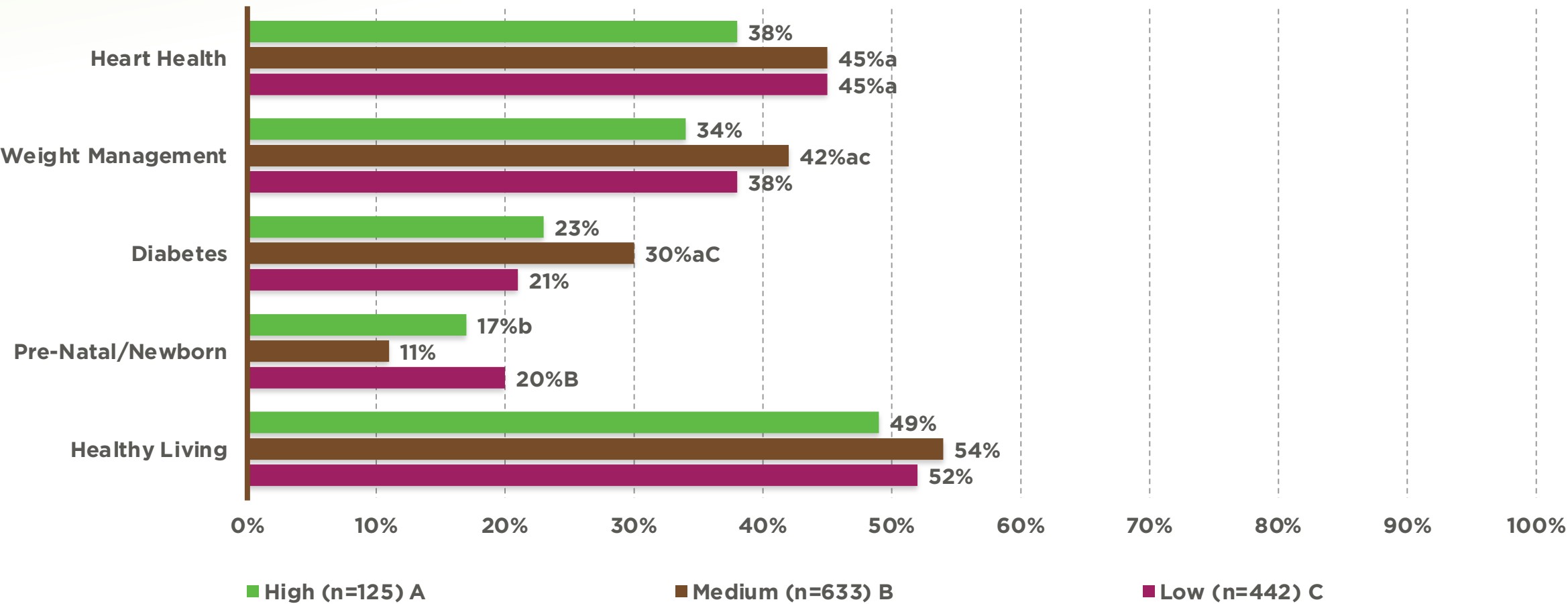
Full details for the Health & Wellness pillars for the general sample are in a separate report

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



HEALTH AND WELLNESS PILLARS

THE HIGH ACCULTURATION LEVEL GENERALLY FALLS LOWER IN EACH OF THE HEALTH PILLARS EXCEPT PRE-NATAL/NEWBORN - LIKELY DRIVEN BY THEM BEING SOMEWHAT YOUNGER.



HEALTH AND WELLNESS PILLAR CROSSOVER

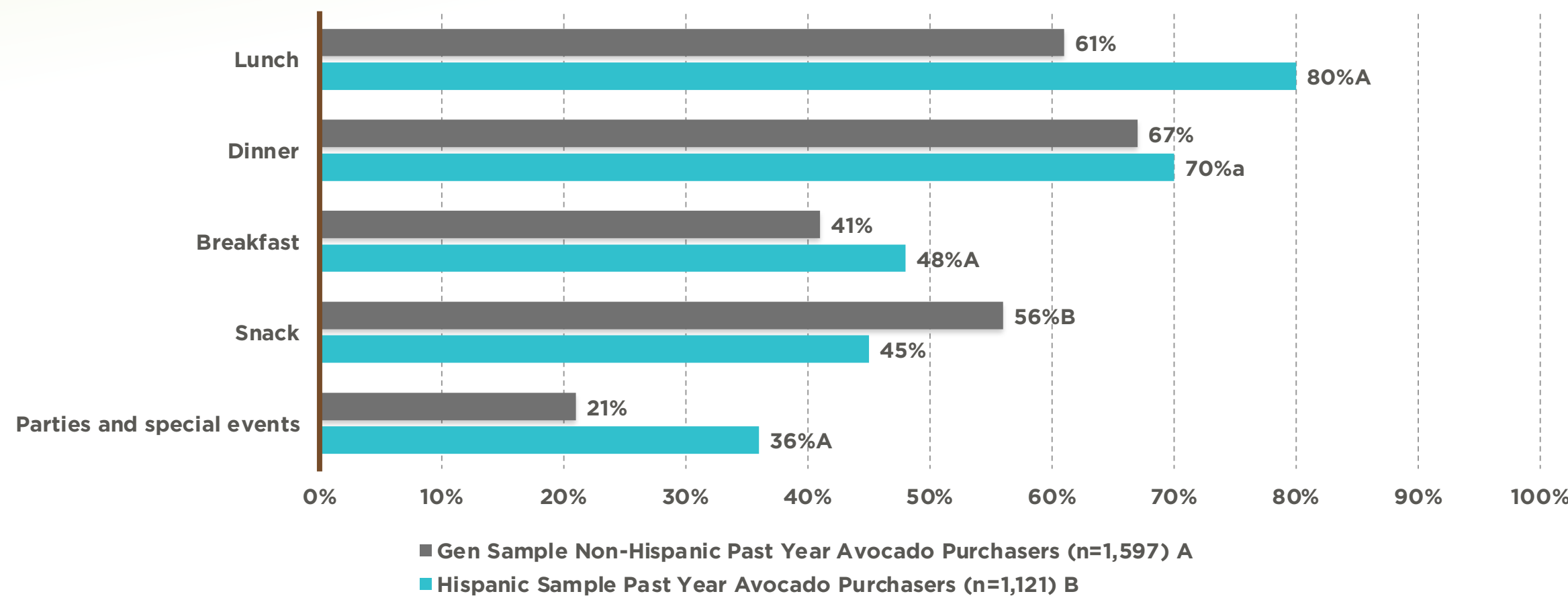
THE HEALTH PILLARS ARE NOT UNIQUE GROUPS. RATHER, LARGE PORTIONS OF RESPONDENTS FALL INTO MORE THAN ONE PILLAR.

	Heart Health (n=533) % A	Weight Management (n=477) % B	Diabetes (n=312) % C	Pre-Natal/ Newborn (n=178) % D	Healthy Living (n=632) % E
Heart Health	100	50	47	45	48
Weight Management	45D	100	49aD	34	63ACD
Diabetes	28D	32ADE	100	21	27D
Pre-Natal/Newborn	15bc	13	12	100	16BC
Healthy Living	57	84ACD	55	56	100

AVOCADO USAGE

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

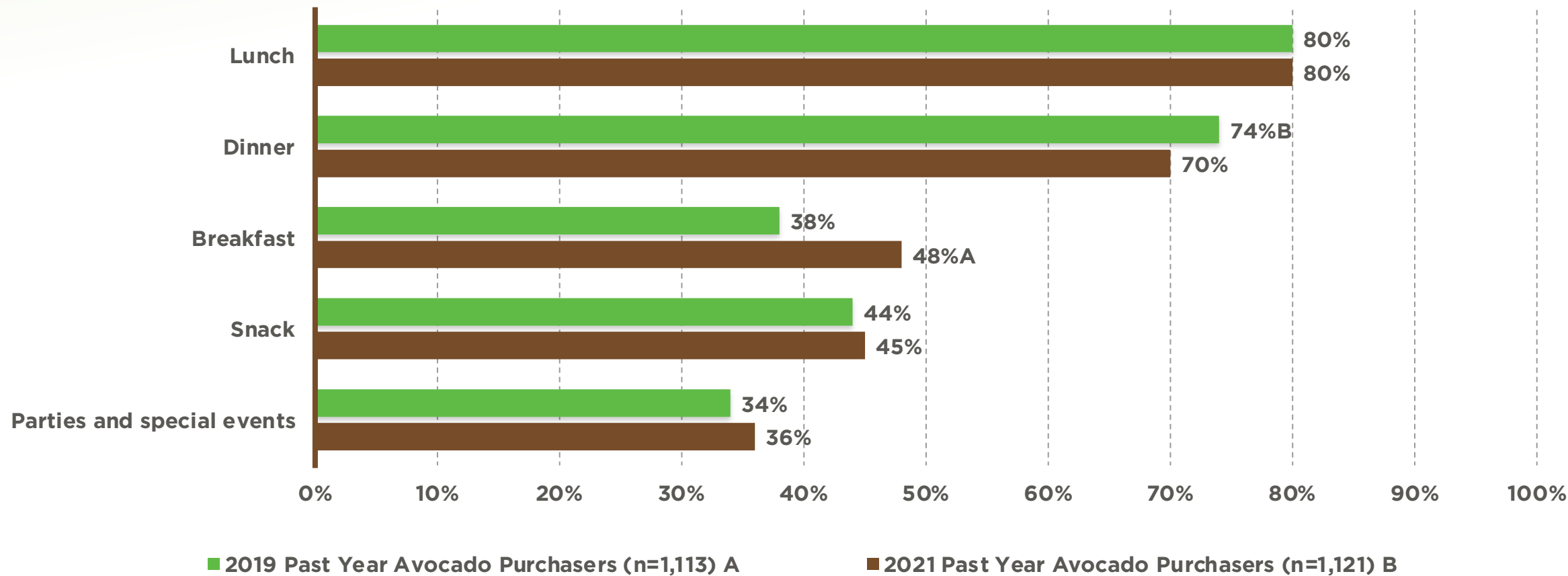
AVOCADO USAGE OCCASIONS GENERAL SKEW HIGHER THAN SEEN FOR GENERAL SAMPLE
NON-HISPANICS, EXCEPT FOR AS A SNACK, WHERE IT IS STILL LOWER AMONG HISPANICS
(SIMILAR TO 2019 AMONG HISPANICS(44% TO 45%))



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

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

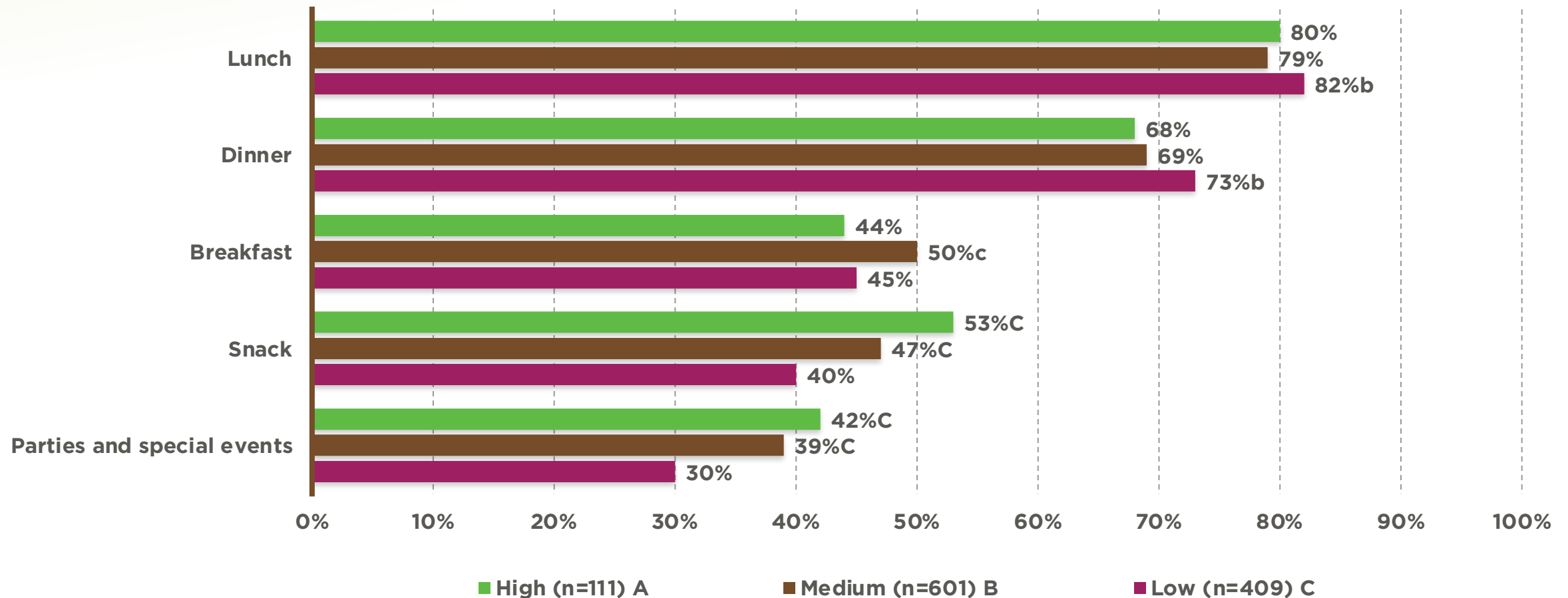
THERE HAS BEEN A SLIGHT DECREASE AMONG HISPANICS FOR USING AVOCADOS AT DINNER, WHILE USAGE AT BREAKFAST IS UP SIGNIFICANTLY.



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

MEAL OCCASIONS HOUSEHOLD TYPICALLY USE AVOCADOS

THERE ARE MANY DIFFERENCES ACROSS ACCULTURATION LEVELS IN TERMS OF WHEN AVOCADOS ARE USED. THE HIGHER THE ACCULTURATION, THE MORE LIKELY HISPANICS ARE TO USE AVOCADOS AS A SNACK OR FOR PARTIES/SPECIAL EVENTS.



■ High (n=111) A

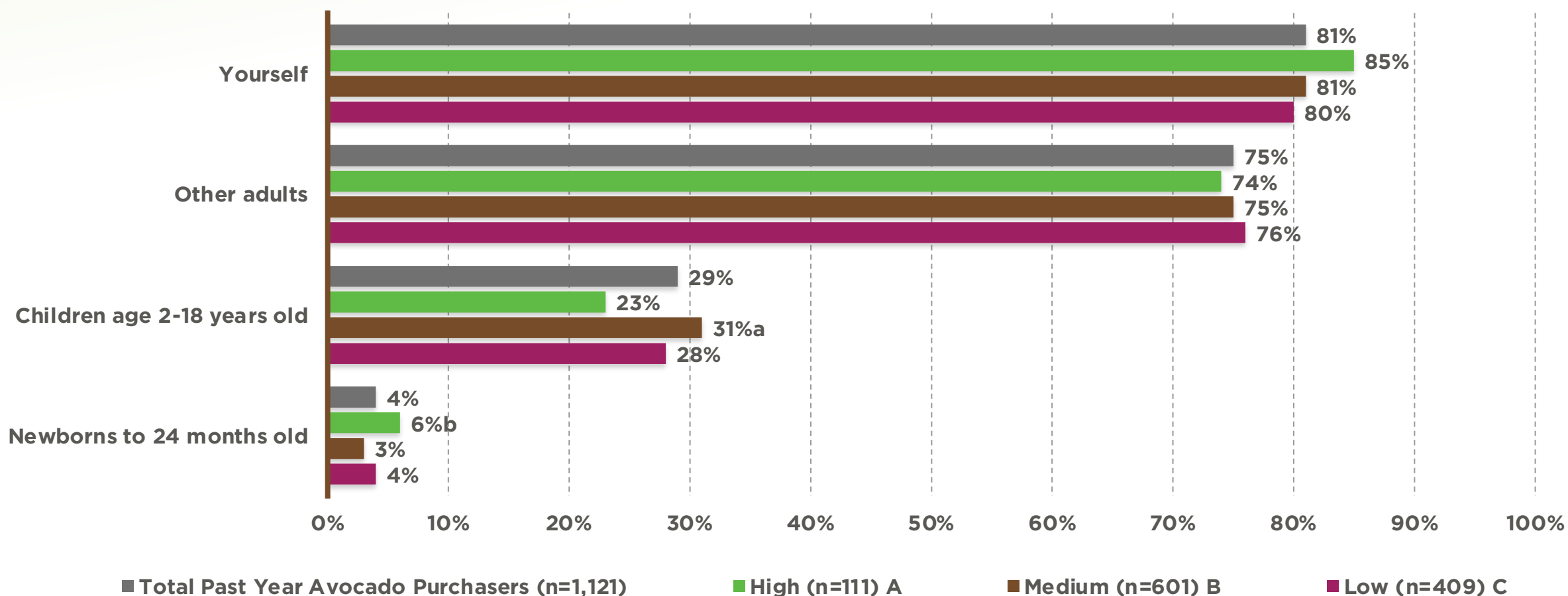
■ Medium (n=601) B

■ Low (n=409) C

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

HOUSEHOLD MEMBERS CONSUMING AVOCADOS

HOUSEHOLD MEMBERS' AVOCADO CONSUMPTION IS MOSTLY THE SAME ACROSS ACCULTURATION LEVELS.

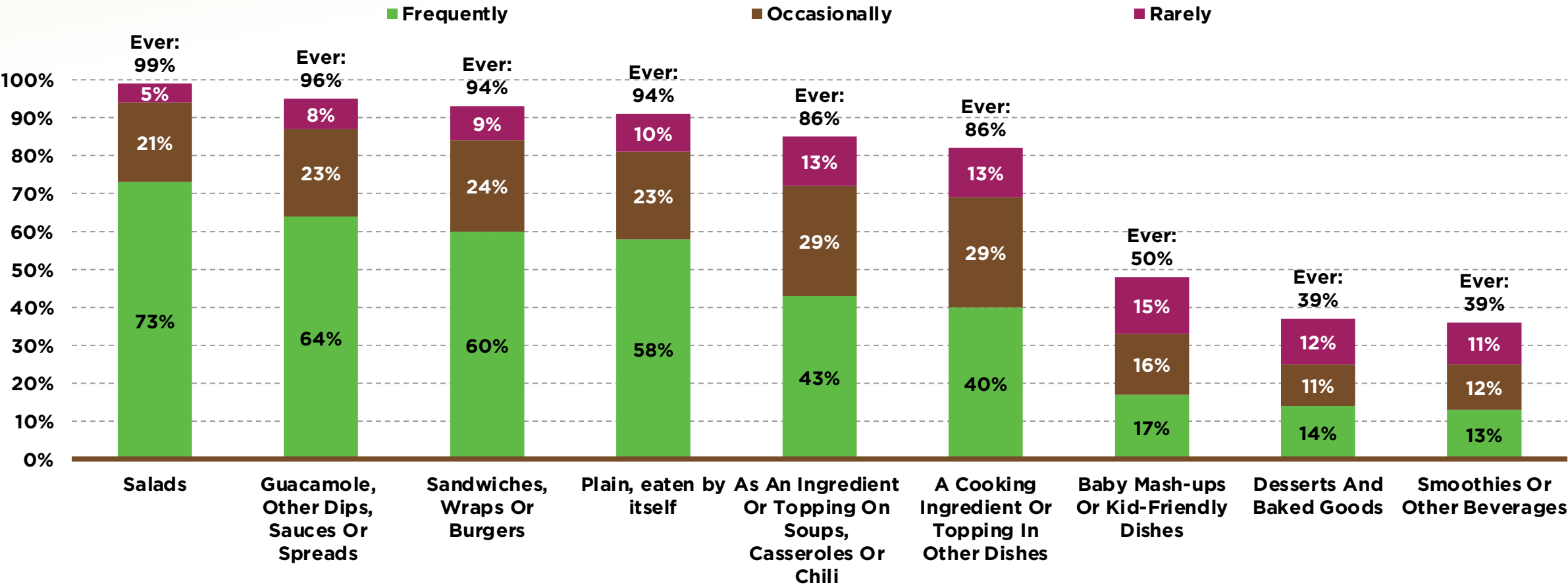


Q160 – Who in your household eats avocados or dishes made at home with avocados?

HOW AVOCADOS ARE CONSUMED

(TOTAL PAST YEAR AVOCADO PURCHASERS)

AS SEEN BEFORE, GUACAMOLE/DIPS, SALADS, SANDWICHES/WRAPS/BURGERS AND PLAIN ARE THE MOST COMMON WAYS HISPANICS ARE USING AVOCADOS.

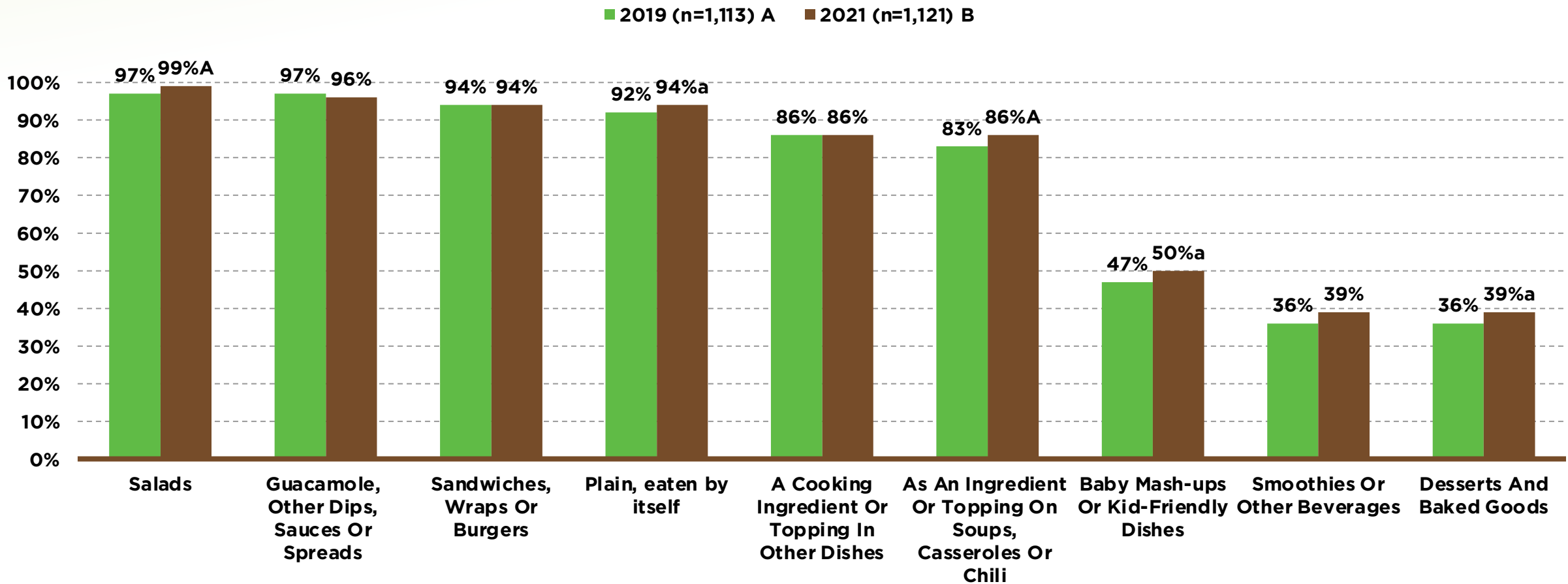


Q170 - How are avocados consumed in your household and how often?

HOW AVOCADOS ARE CONSUMED

(TOTAL PAST YEAR AVOCADO PURCHASERS)

THERE HAVE BEEN MINIMAL CHANGES SINCE 2019 IN HOW HISPANICS ARE USING AVOCADOS.

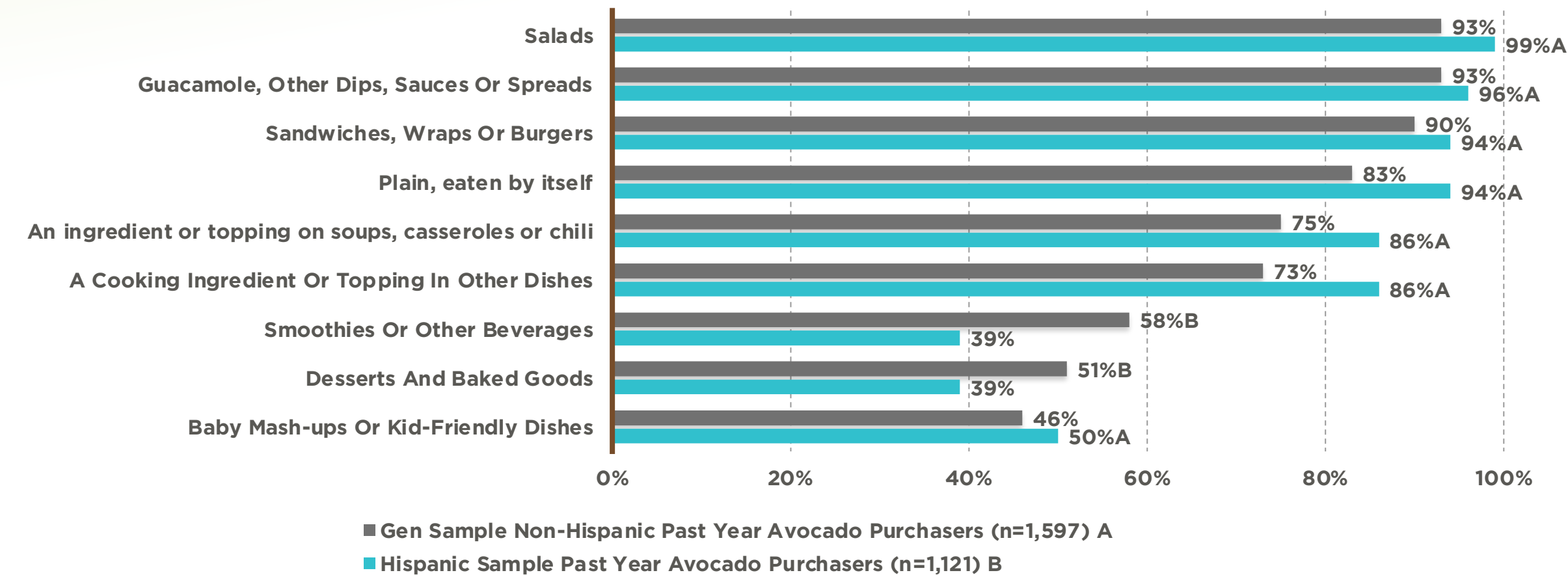


Q170 - How are avocados consumed in your household and how often?

WAYS EVER CONSUMED AVOCADOS

(TOTAL PAST YEAR AVOCADO PURCHASERS)

AS SEEN BEFORE, HISPANICS ARE USING AVOCADOS IN MORE WAYS THAN SEEN AMONG NON-HISPANICS. THEY ARE LESS LIKELY TO USE THEM IN SMOOTHIES OR DESSERTS AND BAKED GOODS.



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

WAYS EVER CONSUMED AVOCADOS

THERE IS QUITE A BIT OF VARIANCE IN THE WAY AVOCADOS ARE CONSUMED. THE LOW ACCULTURATION GROUP IS THE LEAST ADVENTUROUS.

	High (n=111) % A	Medium (n=601) % B	Low (n=409) % C
In salads	100BC	99	99
In guacamole, other dips, sauces or spreads	95	98aC	94
On sandwiches, wraps or burgers	93	95c	92
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	93	94	93
As an ingredient or topping on soups, casseroles or chili	79	92AC	81
As a cooking ingredient or topping in dishes other than those listed above	83	89aC	83
In baby mash-ups or kid- friendly dishes	50	53C	45
In desserts and baked goods, such as puddings and cakes	32	46AC	32
In smoothies or other beverages	36c	46aC	29

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

WAYS FREQUENTLY CONSUME AVOCADOS

THE MEDIUM ACCULTURATION GROUP SKEWS HIGHER IN TERMS OF THE WAYS THEY FREQUENTLY USE AVOCADOS.

	High (n=111) % A	Medium (n=601) % B	Low (n=409) % C
In salads	61	74A	76A
In guacamole, other dips, sauces or spreads	57	68AC	62
On sandwiches, wraps or burgers	54	62a	59
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	50	59a	60a
As an ingredient or topping on soups, casseroles or chili	30	47AC	39a
As a cooking ingredient or topping in dishes other than those listed above	34	43a	39
In baby mash-ups or kid- friendly dishes	16	18c	14
In desserts and baked goods, such as puddings and cakes	12	17aC	10
In smoothies or other beverages	7	17AC	9

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

WAYS FREQUENTLY/OCCASIONALLY CONSUME AVOCADOS

THE MEDIUM ACCULTURATION GROUP ALSO SKEWS HIGHER IN TERMS OF THE WAYS THEY FREQUENTLY OR OCCASIONALLY USE AVOCADOS.

	High (n=111) % A	Medium (n=601) % B	Low (n=409) % C
In salads	88	94a	95A
In guacamole, other dips, sauces or spreads	84	90aC	85
On sandwiches, wraps or burgers	80	88aC	81
On their own (plain or with salt/pepper or a squeeze of lemon/lime)	78	83	81
As an ingredient or topping on soups, casseroles or chili	63	76AC	68
As a cooking ingredient or topping in dishes other than those listed above	68	72C	66
In baby mash-ups or kid- friendly dishes	30	36aC	28
In smoothies or other beverages	17	32AC	17
In desserts and baked goods, such as puddings and cakes	17	31AC	18

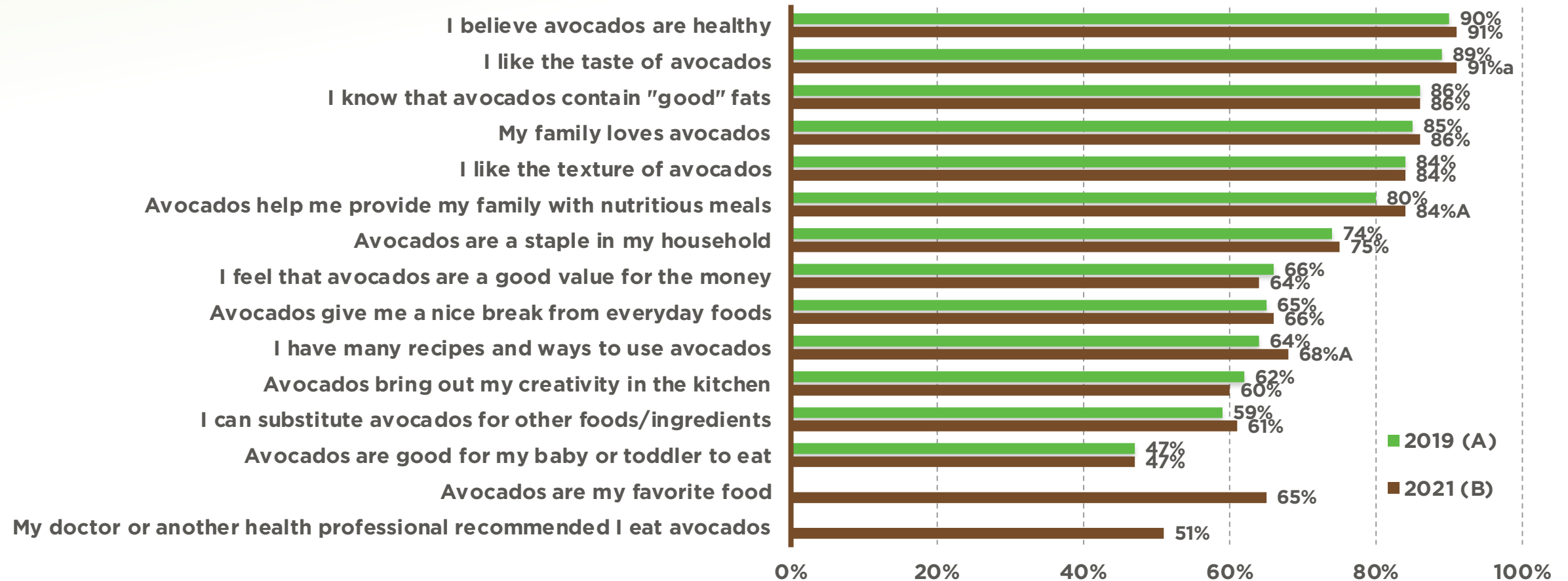
Q170 - How are avocados consumed in your household and how often?

AVOCADO PURCHASE DRIVERS AND BARRIERS

REASONS FOR PURCHASING AVOCADOS

(5 OR 4 ON A 5-POINT SCALE)(TOTAL SAMPLE)

HISPANICS AGREE THAT THERE ARE MANY REASONS TO PURCHASE AVOCADOS. TOP REASONS ARE BEING HEALTHY, LIKING THE TASTE, GOOD FATS, THE FAMILY LOVES THEM, LIKING THE TEXTURE AND HELPING TO PROVIDE NUTRITIOUS MEALS. SCORES FOR MOST OF THESE ARE SIMILAR TO 2019.



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

REASONS FOR PURCHASING AVOCADOS

(5 OR 4 ON A 5-POINT SCALE)

BOTH THE MEDIUM AND LOW ACCULTURATION GROUPS GENERALLY AGREES WITH MORE REASONS FOR BUYING AVOCADOS THAN SEEN AMONG THE HIGH ACCULTURATION GROUP. HOWEVER, MANY SCORES ARE STRONG AMONG THE HIGH ACCULTURATION GROUP.

	High (n=125) % A	Medium (n=633) % B	Low (n=442) % C
I believe avocados are healthy	87	91	93ab
My family loves avocados	84	87	86
I like the taste of avocados	83	91A	93A
I know that avocados contain "good" fats	81	87a	86a
Avocados help me provide my family with nutritious meals	75	84A	86A
I like the texture of avocados	74	83A	88AB
Avocados are a staple in my household	66	77A	74a
I have many recipes and ways to use avocados	64	69	67
Avocados give me a nice break from everyday foods	60	69ac	64
I feel that avocados are a good value for the money	58	68AC	60
Avocados are my favorite food	52	68A	66A
I can substitute avocados for other foods/ingredients	50	62A	61A
Avocados bring out my creativity in the kitchen	50	62A	60A
Avocados are good for my baby or toddler to eat	44	47	48
My doctor or another health professional recommended I eat avocados	38	55AC	48A

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

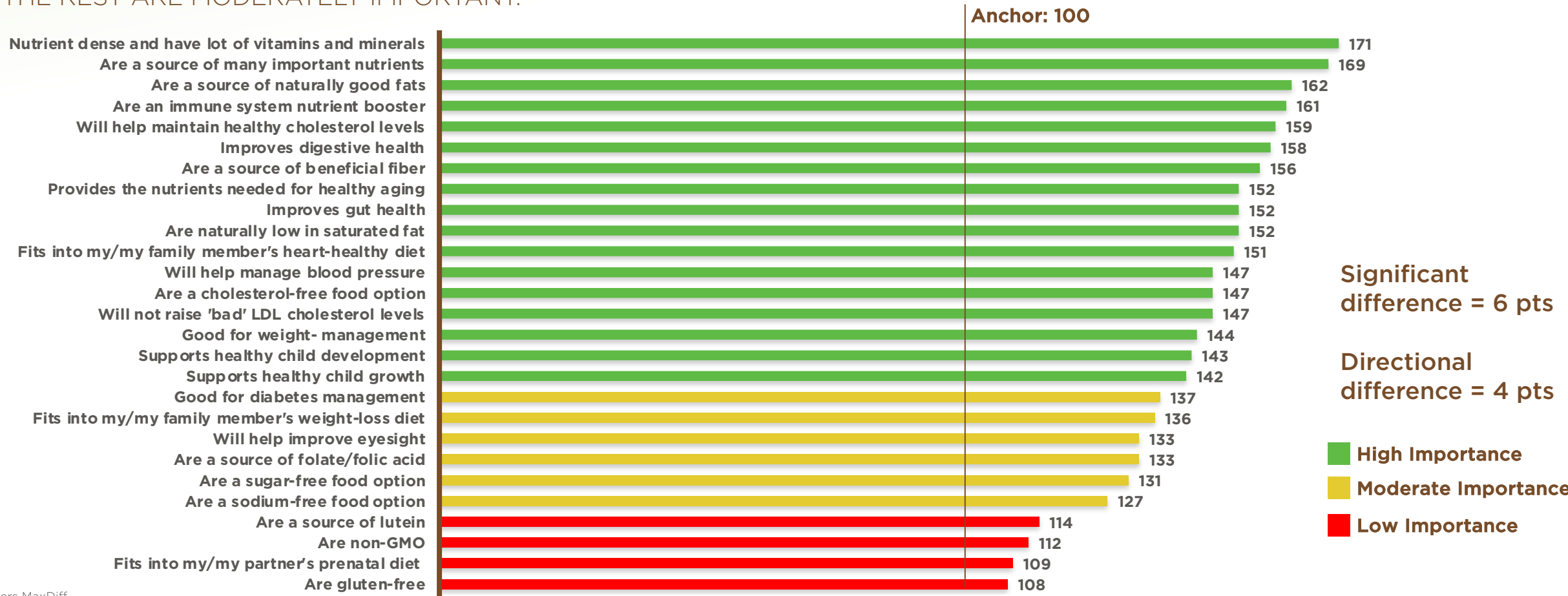
MAXDIFF EXPLANATION

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

ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

TOTAL SAMPLE

THE TOP TWO DECISION DRIVERS WHEN PURCHASING FRESH PRODUCE ARE NUTRIENT DENSE WITH A LOT OF VITAMINS AND MINERALS AND BEING A SOURCE OF MANY IMPORTANT NUTRIENTS - THE SAME AS SEEN AMONG THE GENERAL SAMPLE, AND THE SAME AS SEEN IN 2019. ANOTHER 15 ATTRIBUTES ARE ALSO VERY IMPORTANT. MOST OF THE REST ARE MODERATELY IMPORTANT.



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

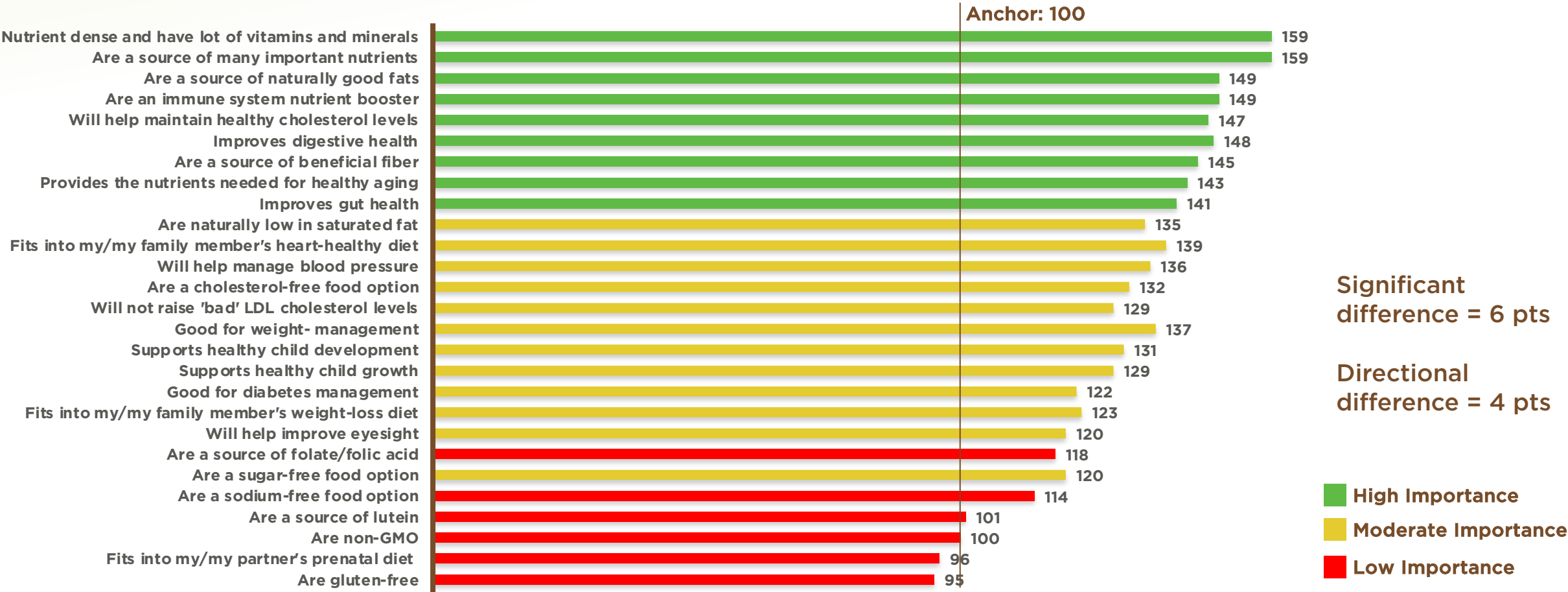
THE IMPORTANCE OF MANY ATTRIBUTES IS STRONGEST AMONG THE MEDIUM ACCULTURATION GROUP, AND SECOND STRONGEST AMONG THE LOWEST ACCULTURATION GROUP.

	Gen Sample Non-Hispanics (n=2,251) A	Total Hispanic Sample (n=1,200) B	High (n=125) A	Medium (n=633) B	Low (n=442) C
Nutrient dense and have lot of vitamins and minerals	163	171A	159	174Ac	170A
Are a source of many important nutrients	162	169A	159	172Ac	168a
Are a source of naturally good fats	152	162A	149	166Ac	161A
Are an immune system nutrient booster	149	161A	149	165AC	158a
Will help maintain healthy cholesterol levels	149	159A	147	163AC	156a
Improves digestive health	147	158A	148	162AC	154
Are a source of beneficial fiber	151	156A	145	161AC	152a
Provides the nutrients needed for healthy aging	153	152	143	158AC	147
Improves gut health	140	152A	141	156AC	148
Are naturally low in saturated fat	143	152A	135	158AC	149A
Fits into my/my family member's heart-healthy diet	136	151A	139	156AC	148a
Will help manage blood pressure	139	147A	136	153AC	142
Are a cholesterol-free food option	137	147A	132	153AC	143a
Will not raise 'bad' LDL cholesterol levels	139	147A	129	154AC	143A
Good for weight- management	132	144A	137	149aC	140
Supports healthy child development	95	143A	131	146Ac	141a
Supports healthy child growth	95	142A	129	146Ac	140a

ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

HIGH ACCULTURATION

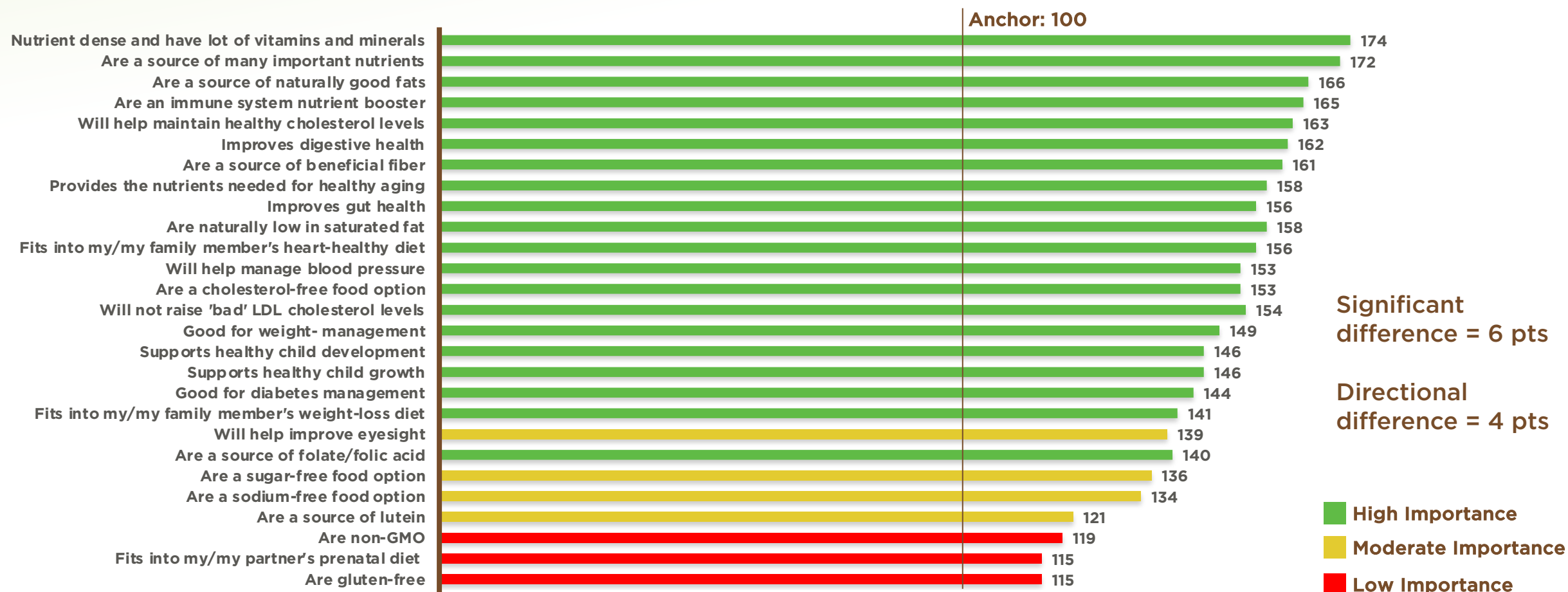
THE HIGH ACCULTURATION GROUP FINDS 9 OF THE ATTRIBUTES OF HIGH IMPORTANCE. THE TOP ATTRIBUTES ARE THE SAME AS WHAT WE SEE OVERALL.



ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

MEDIUM ACCULTURATION

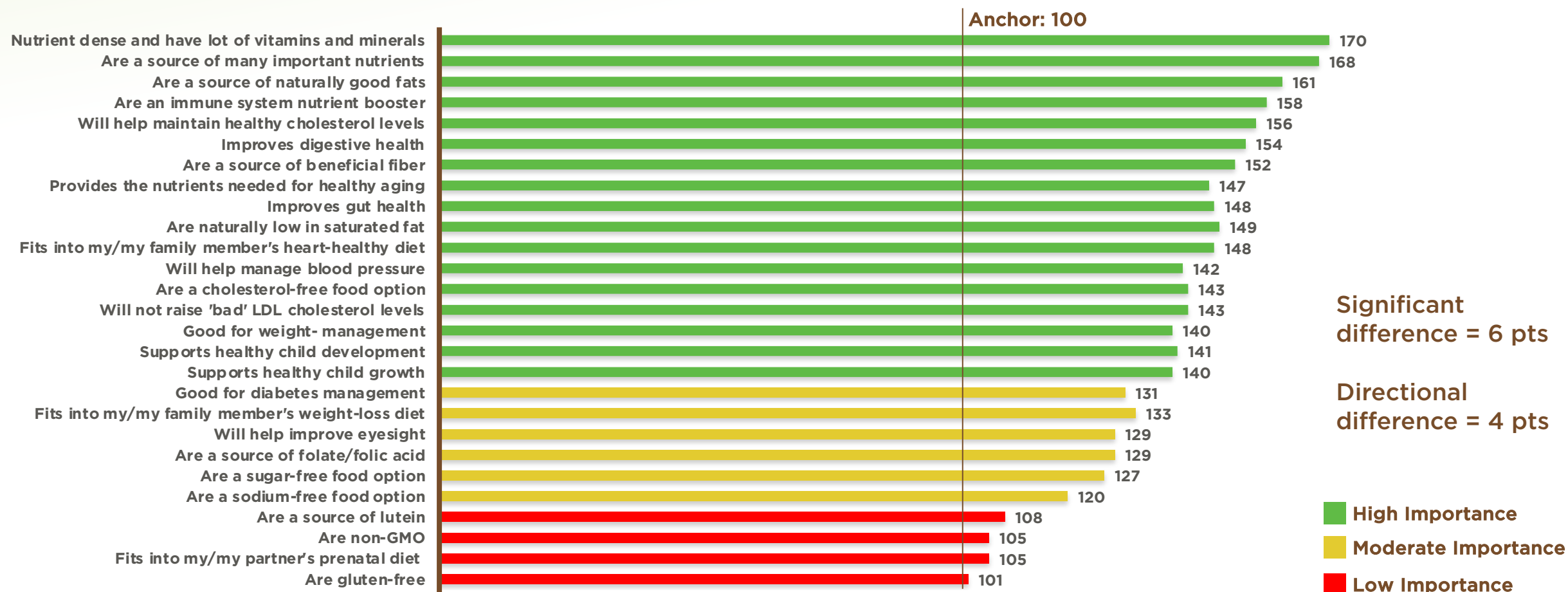
THE MEDIUM ACCULTURATION GROUP FINDS THE MOST ATTRIBUTES TO BE OF HIGH IMPORTANCE.



ATTRIBUTES CONSIDERED IMPORTANT WHEN DECIDING TO PURCHASE FRESH FRUITS & VEGETABLES

LOW ACCULTURATION

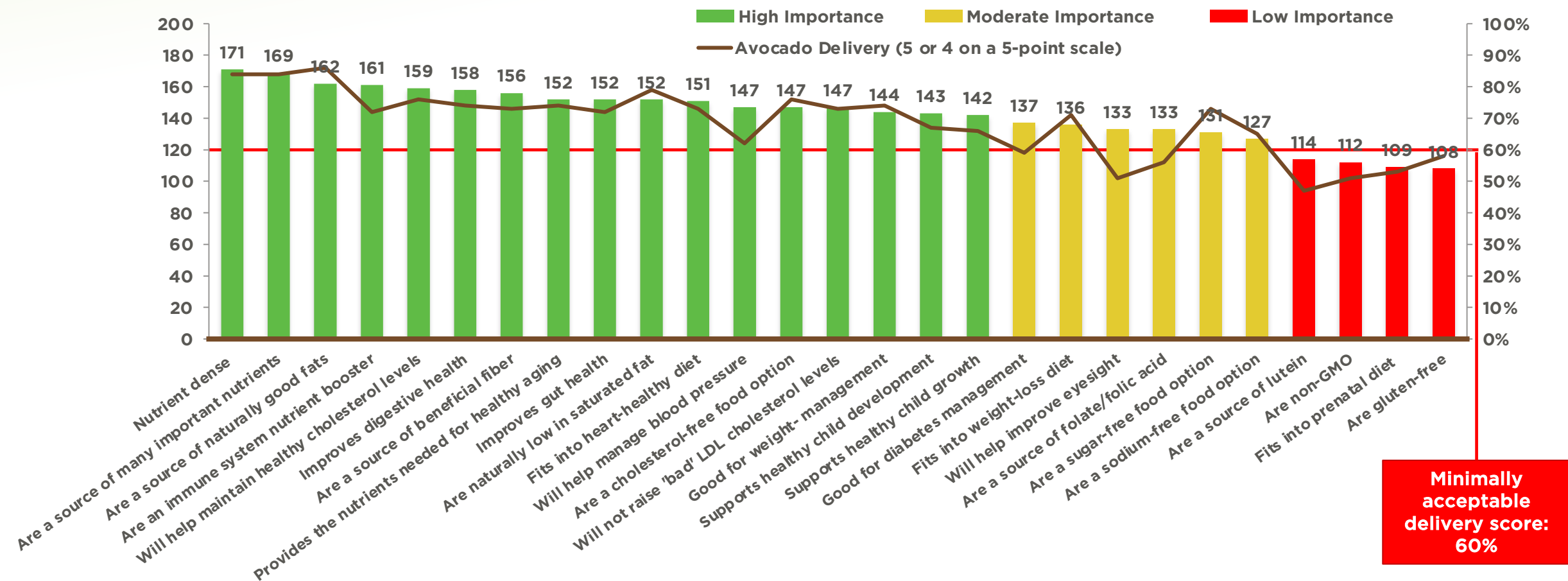
THE LOW ACCULTURATION GROUP ALSO FINDS MANY OF THE ATTRIBUTES TO BE OF HIGH IMPORTANCE.



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

TOTAL SAMPLE

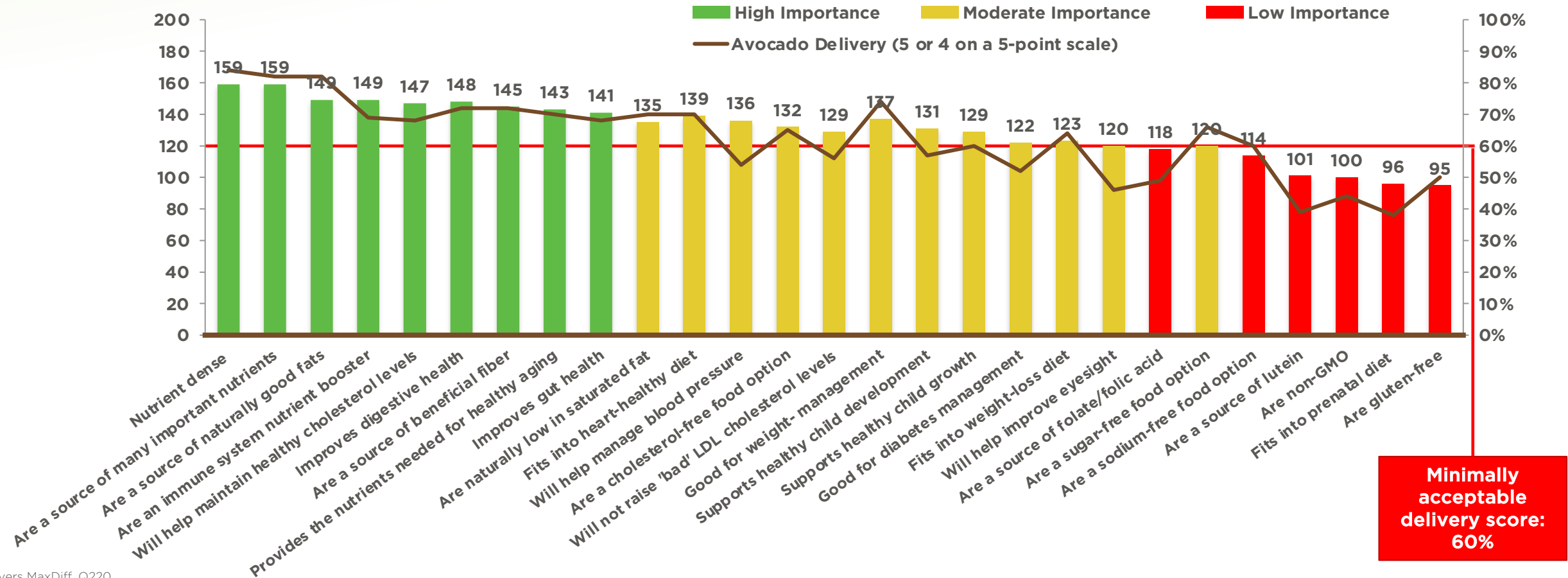
AVOCADOS HAVE STRONG PERCEIVED DELIVERY AGAINST ALL OF THE MOST IMPORTANT ATTRIBUTES.



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

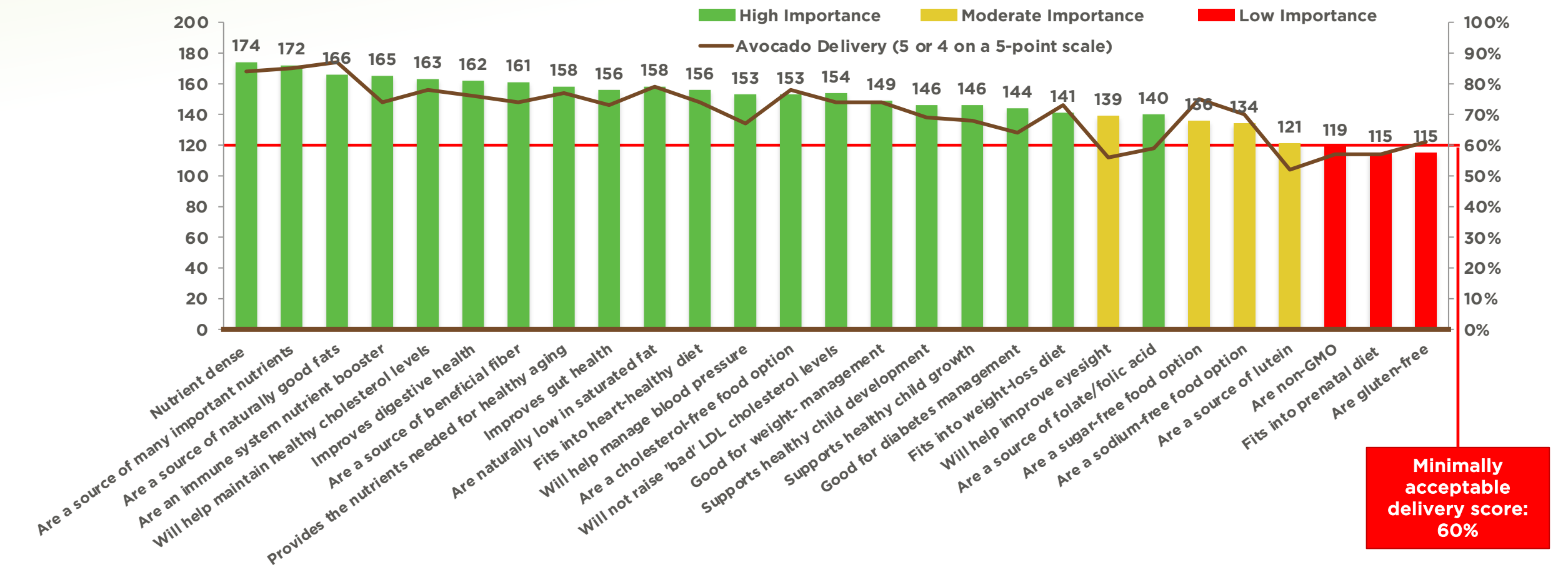
HIGH ACCULTURATION

AVOCADOS HAVE STRONG PERCEIVED DELIVERY AGAINST THE MOST IMPORTANT ATTRIBUTES AMONG THE HIGH ACCULTURATION GROUP.



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

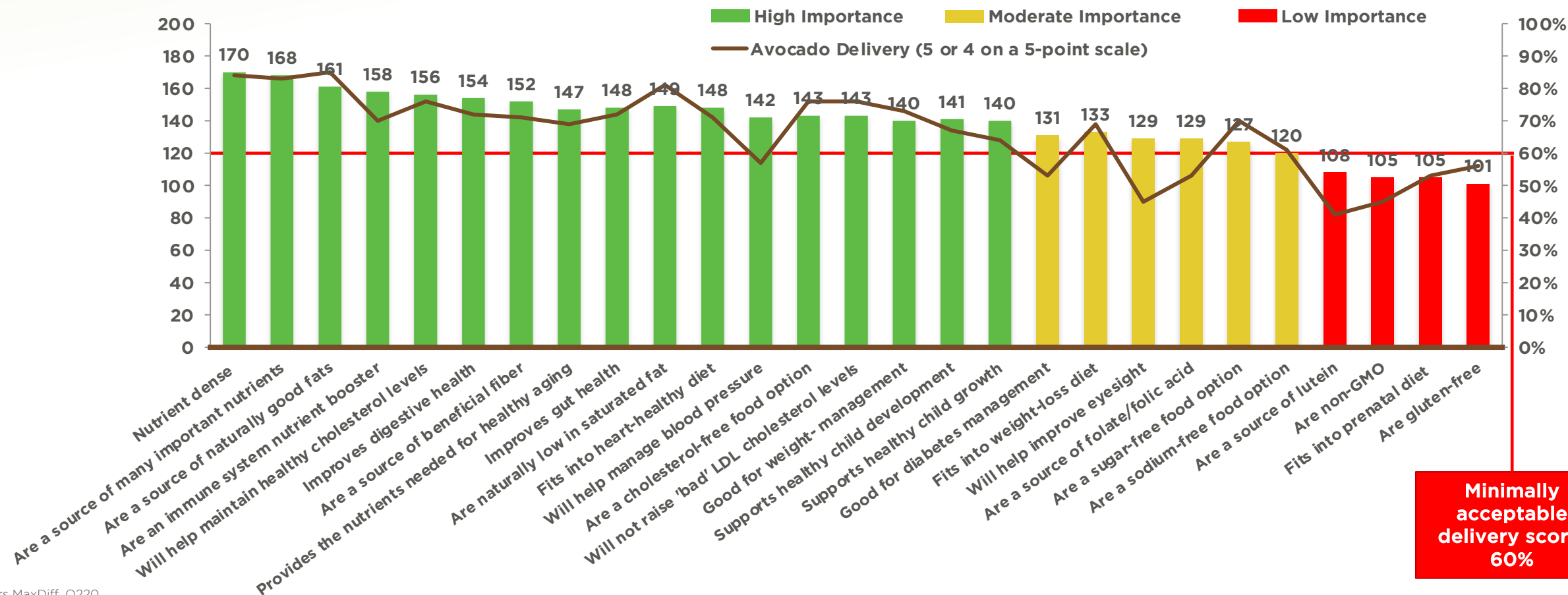
AVOCADOS ALSO HAVE STRONG PERCEIVED DELIVERY AGAINST THE MOST IMPORTANT ATTRIBUTES FOR THE MEDIUM ACCULTURATION GROUP.



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

LOW ACCULTURATION

AVOCADOS ALSO HAVE STRONG PERCEIVED DELIVERY AGAINST THE MOST IMPORTANT ATTRIBUTES FOR THE LOW ACCULTURATION GROUP EXCEPT FOR HELPING TO MANAGE BLOOD PRESSURE - WHICH FALLS A BIT SHORT OF MINIMUM STANDARDS.



AVOCADO DELIVERY

(5 OR 4 ON A 5-POINT SCALE)

AVOCADOS CONTINUE TO PERFORM WELL WITH SEVERAL RATINGS UP - DRIVEN BY THE MEDIUM ACCULTURATION GROUP. HOWEVER, WE HAD SEEN DECREASES AMONG THIS GROUP IN 2019, SO SOME OF THIS INCREASE IS JUST GETTING US BACK TO 2018 LEVELS.

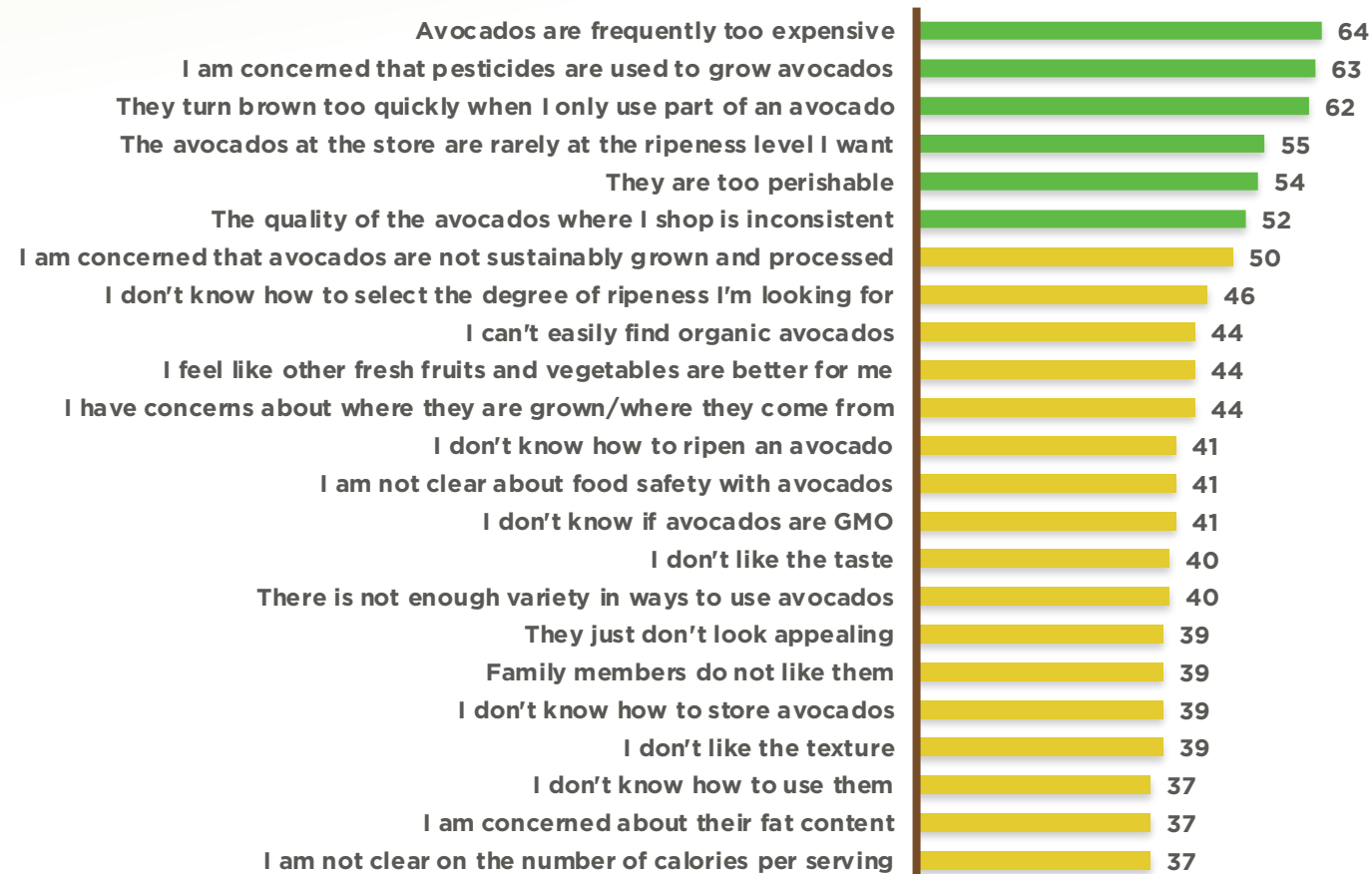
Green = up from last year
Pink = down from last year

	Total Sample (n=1,200) %	High (n=125) % A	Medium (n=633) % B	Low (n=442) % C
Are a source of naturally good fats	86	82	87	85
Nutrient dense and have lot of vitamins and minerals	84	84	84	84
Are a source of many important nutrients	84	82	85	83
Are naturally low in saturated fat	79	70	79A	81A
Will help maintain healthy cholesterol levels	76	68	78A	76a
Are a cholesterol-free food option	76	65	78A	76A
Good for weight- management	74	74	74	73
Improves digestive health	74	72	76c	72
Provides the nutrients needed for healthy aging	74	70	77aC	69
Are a source of beneficial fiber	73	72	74	71
Fits into my/my family member's heart-healthy diet	73	70	74	71
Are a sugar-free food option	73	66	75Ac	70
Will not raise 'bad' LDL cholesterol levels	73	56	74A	76A
Are an immune system nutrient booster	72	69	74c	70
Improves gut health	72	68	73	72
Fits into my/my family member's weight-loss diet	71	64	73a	69
Supports healthy child development	67	57	69A	67A
Supports healthy child growth	66	60	68ac	64
Are a sodium-free food option	65	60	70AC	61
Will help manage blood pressure	62	54	67AC	57
Good for diabetes management	59	52	64AC	53
Are gluten-free	58	50	61Ac	56
Are a source of folate/folic acid	56	49	59AC	53
Fits into my/my partner's prenatal diet	53	38	57A	53A
Will help improve eyesight	51	46	56AC	45
Are non-GMO	51	44	57AC	45
Are a source of lutein	47	39	52AC	41

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

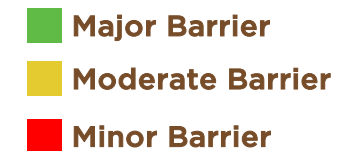
BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

FREQUENTLY BEING TOO EXPENSIVE, CONCERN ABOUT PESTICIDES (10TH PLACE AMONG THE GENERAL SAMPLE), AND TURNING BROWN TOO QUICKLY WHEN PARTIALLY USED ARE THE TOP BARRIERS TO AVOCADO PURCHASE. IN 2019, BEING TOO EXPENSIVE WAS MUCH MORE OF A BARRIER THAN ANYTHING ELSE.



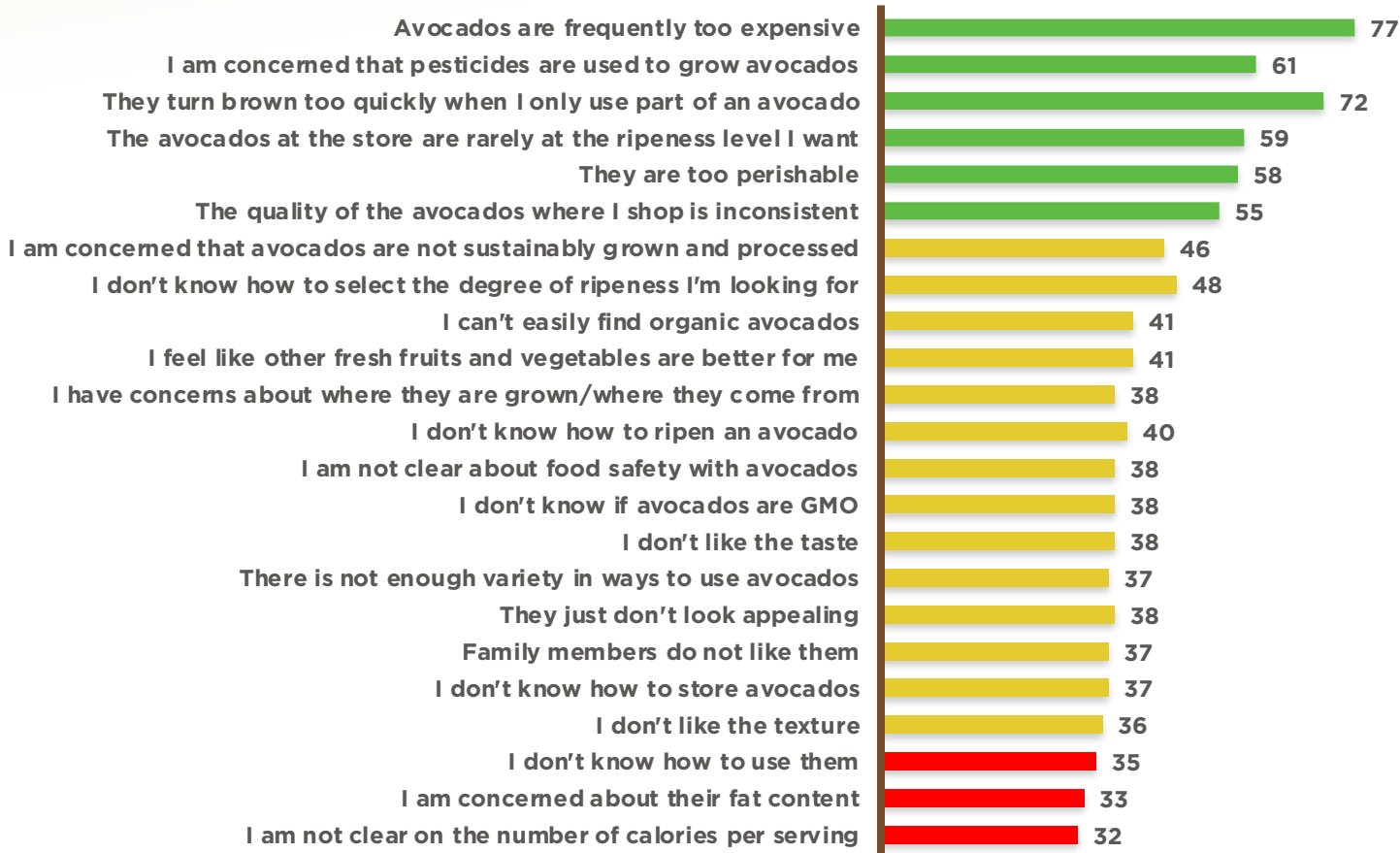
Anchor: 100

Significant difference = 6 pts
Directional difference = 4 pts



BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

BEING TOO EXPENSIVE IS THE TOP BARRIER AMONG THE HIGH ACCULTURATION GROUP, WITH TURNING BROWN TOO QUICKLY IN SECOND PLACE.



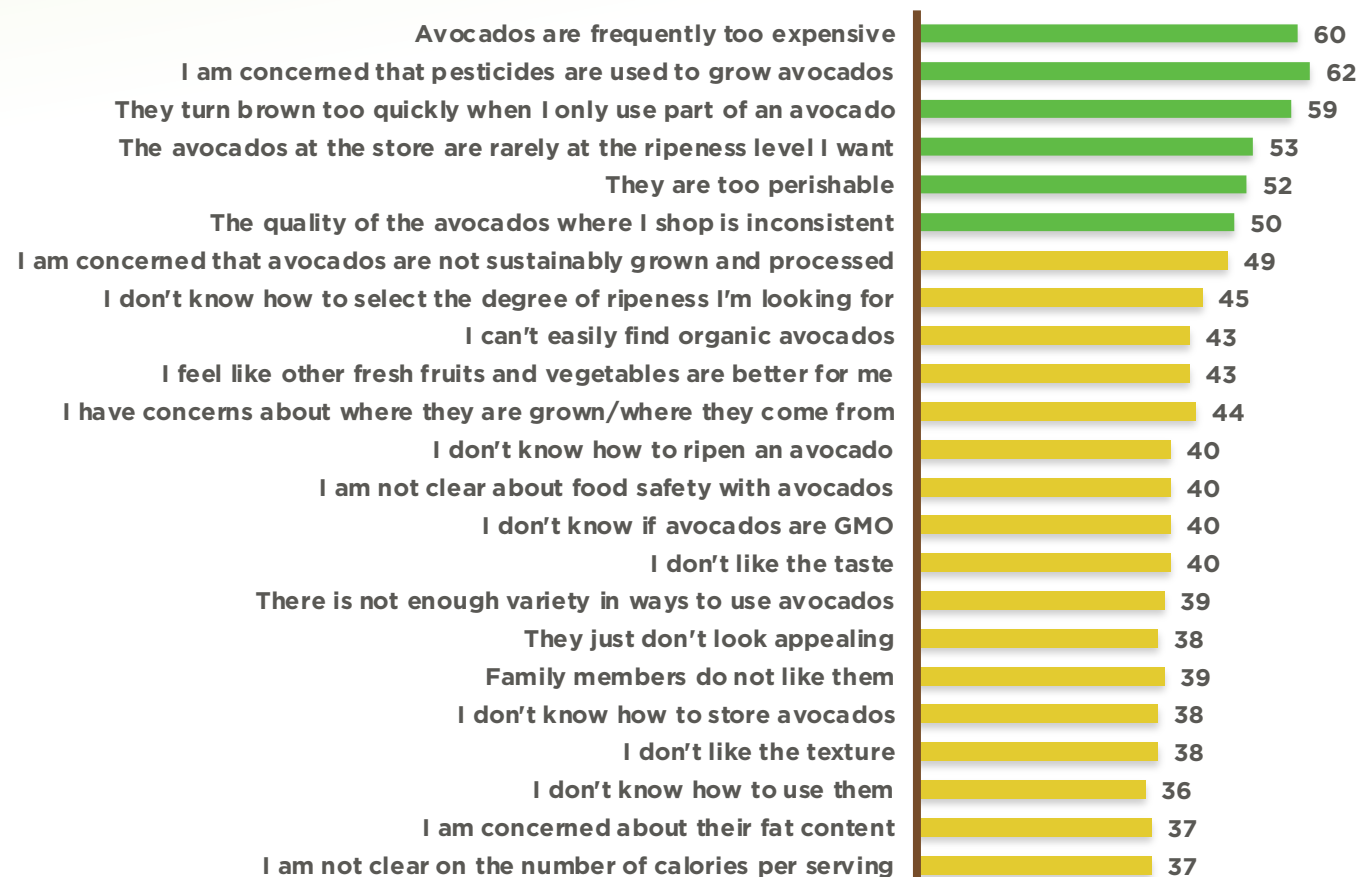
Anchor: 100

Significant difference = 15 pts
Directional difference = 10 pts

- Major Barrier
- Moderate Barrier
- Minor Barrier

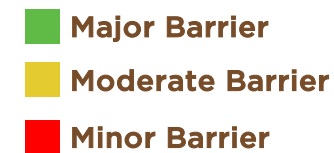
BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

BEING TOO EXPENSIVE, PESTICIDE CONCERNS AND TURNING BROWN TOO QUICKLY ARE TOP BARRIERS AMONG THE MEDIUM ACCULTURATION GROUP.



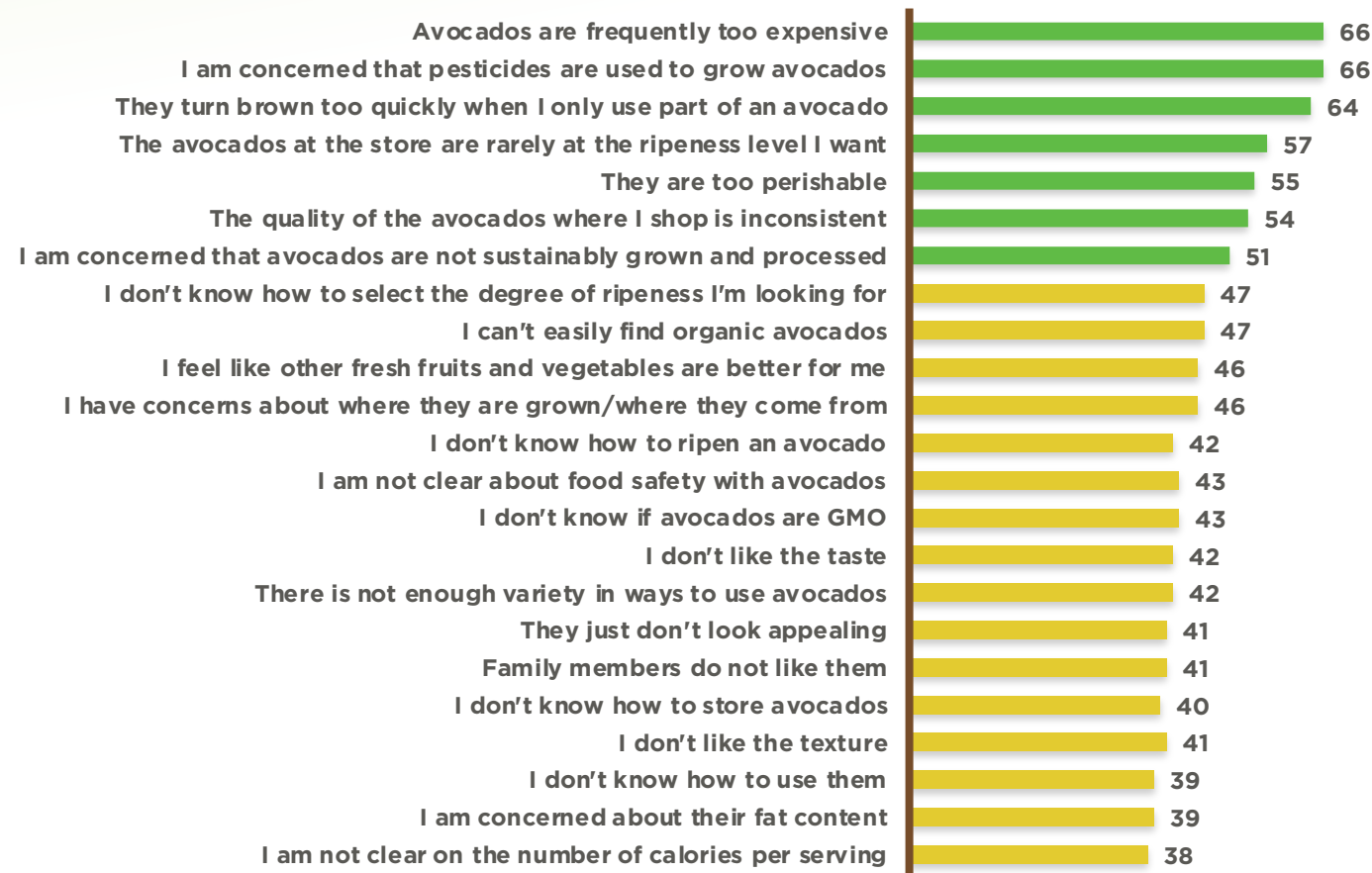
Anchor: 100

Significant difference = 7 pts
Directional difference = 5 pts



BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

TOP BARRIERS FOR THE LOW ACCULTURATION GROUP ARE BEING TOO EXPENSIVE, PESTICIDE CONCERNS AND TURNING BROWN TOO QUICKLY.



Anchor: 100

Significant difference = 11 pts
Directional difference = 7 pts

- Major Barrier
- Moderate Barrier
- Minor Barrier

MAJOR BARRIERS TO PURCHASING AVOCADOS (MORE OFTEN)

FREQUENTLY BEING TOO EXPENSIVE IS DOWN FROM 2019 WHILE PESTICIDE CONCERNS ARE UP.

	Gen Sample Non- Hispanics (n=2,251) A	Total Hispanic Sample (n=1,200) B	High (n=125) A	Medium (n=633) B	Low (n=442) C
Avocados are frequently too expensive	73B	64	77Bc	60	66b
I am concerned that pesticides are used to grow avocados	52	63A	61	62	66
They turn brown too quickly when I only use part of an avocado	69B	62	72B	59	64b
The avocados at the store are rarely at the ripeness level I want	58b	55	59	53	57
They are too perishable	62B	54	58	52	55
The quality of the avocados where I shop is inconsistent	57B	52	55	50	54
I am concerned that avocados are not sustainably grown and processed	42	50A	46	49	51

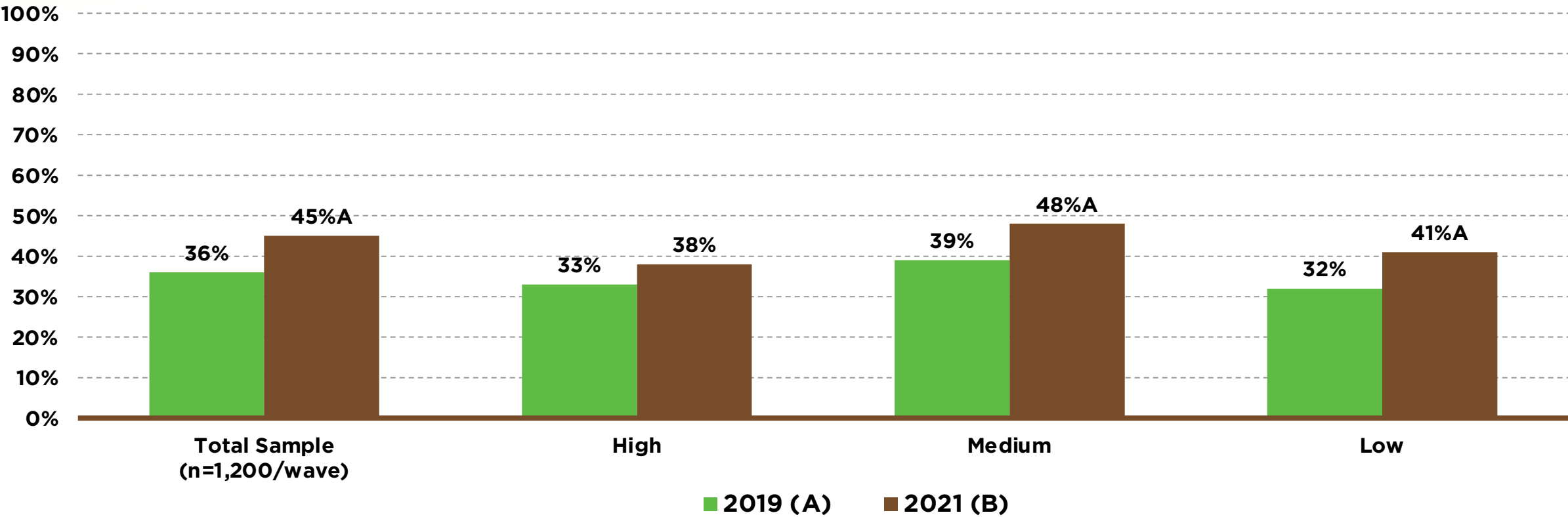
Green = up from 2019, a bad thing
Pink = down from 2019

COMMUNICATIONS



SEEN “LOVE ONE TODAY” LOGO IN PAST YEAR

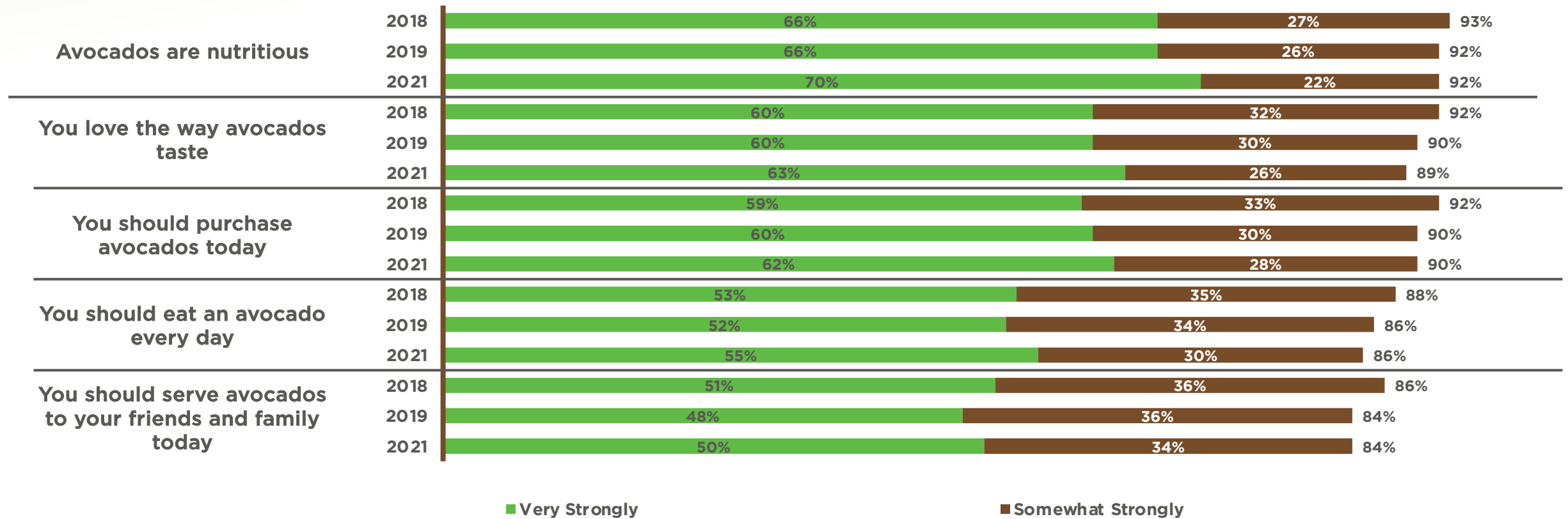
AWARENESS OF THE “LOVE ONE TODAY” LOGO IS BACK UP AFTER A DECREASE IN 2019 (43% IN 2018 TO 36% IN 2019 TO 45% NOW), IT REMAINS MUCH STRONGER THAN SEEN AMONG THE GENERAL SAMPLE (45% VS. 31%).



Q410 - In the past year have you seen the following logos, for example, in grocery stores, magazines, newspapers, email or online/social media?

STATEMENTS LOGO COMMUNICATED (TOTAL SAMPLE)

THE LOGO IS DOING A GOOD JOB OF COMMUNICATING KEY MESSAGES.



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

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

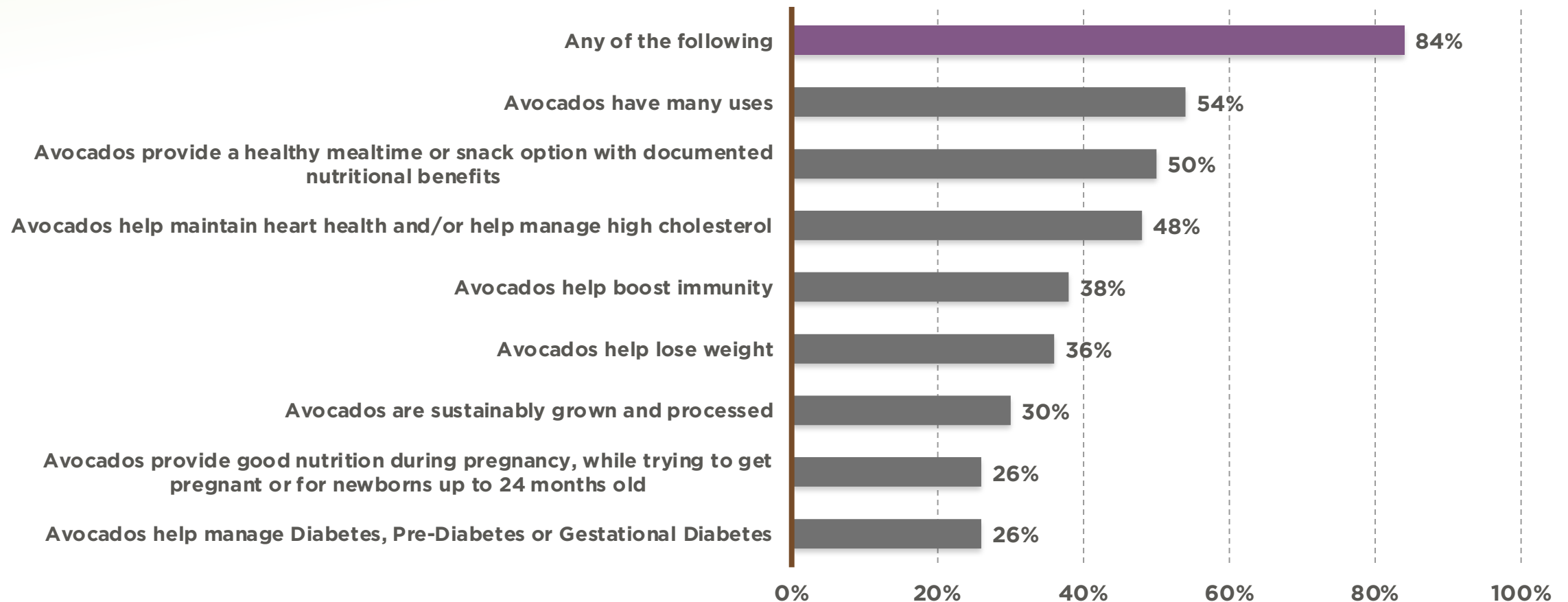
THERE ARE SLIGHT VARIATIONS IN THE MESSAGES COMMUNICATED ACROSS THE ACCULTURATION GROUPS.

	High (n=125) % A	Medium (n=633) % B	Low (n=442) % C
Avocados are nutritious	67	70	70
You love the way avocados taste	64	63	62
You should purchase avocados today	55	63a	62a
You should eat an avocado every day	54	57	53
You should serve avocados to your friends and family today	43	53Ac	48

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

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

HISPANICS ARE MUCH MORE LIKELY THAN THE GENERAL SAMPLE TO CLAIM RECALLING HEALTH RELATED INFORMATION ABOUT AVOCADOS (84% VS. 49%).



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

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

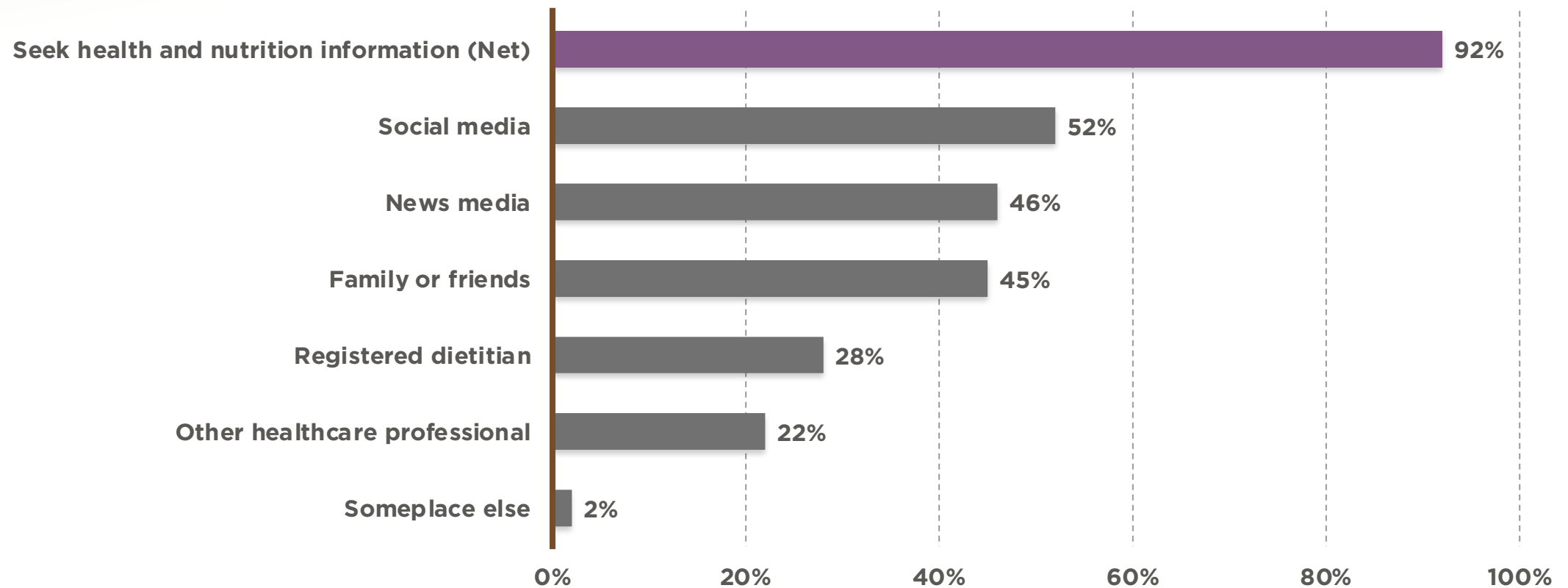
THERE ARE DIFFERENCES IN STATEMENTS RECALLED BY ACCULTURATION LEVEL, WITH SCORES GENERALLY SKEWING LOWER FOR THE HIGH ACCULTURATION GROUP.

	High (n=125) % A	Medium (n=633) % B	Low (n=442) % C
Any of the following:	77	86A	83a
Avocados have many uses	46	55A	55a
Avocados help maintain heart health and/or help manage high cholesterol	45	48	49
Avocados provide a healthy mealtime or snack option with documented nutritional benefits	41	51A	51A
Avocados help boost immunity	41	37	37
Avocados are sustainably grown and processed	30	32c	28
Avocados help lose weight	27	37A	38A
Avocados provide good nutrition during pregnancy, while trying to get pregnant or for newborns up to 24 months old	26	27	26
Avocados help manage Diabetes, Pre-Diabetes or Gestational Diabetes	22	30aC	23

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

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

SOCIAL MEDIA, FAMILY AND FRIENDS, AND THE NEWS MEDIA ARE THE TOP SOURCES OF HEALTH AND NUTRITION INFORMATION. SOCIAL MEDIA WAS NOT A TOP SOURCE FOR THE GENERAL SAMPLE.



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

WHERE HEALTH AND NUTRITION INFORMATION IS TYPICALLY FOUND

THE SOURCE OF NUTRITIONAL INFORMATION VARIES BY ACCULTURATION LEVEL.

	High (n=125) % A	Medium (n=633) % B	Low (n=442) % C
Seek health and nutrition information (Net)	86	92a	93a
Family or friends	45	47	43
News media	45	45	48
Social media	42	53A	55A
Registered dietitian	27	30C	24
Other healthcare professional	22	25C	17
Someplace else	2	1	1

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

Conclusions	Action Step
The U.S. Hispanic population is constantly evolving. While many Hispanics are avid avocado consumers, this is not something HAB can take for granted.	
The use of avocados for breakfast saw nice growth but there is room for more growth for breakfast, as well as for snacks and parties/special events.	
Concerns about pesticides have moved into the major barrier grouping for avocados. Sustainability is also an issue for the low acculturation group. This is something the HAB Sustainability Center must watch and be prepared to address.	
Perceptions of avocados helping with managing blood pressure have slipped overtime and are now below minimally acceptable levels among both the high and low acculturation groups.	
Awareness of “Love One Today” , which had declined in 2019, is back up. Messaging communicated by LOT is strong. HAB must continue to leverage this asset.	

fresh **avocados**

LOVE

ONE TODAY[®]

nutrient-dense • heart-healthy

THANK YOU