

Rethinking Retail: Avocado Path-to-Purchase — The Making of a Household Staple



Understanding Pre-Store Preferences, In-Store Experiences and
Post-Store Satisfaction To Drive Retail Sales of Hass Avocados

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Objective and Methodology

Objective

This study quantitatively investigates avocado purchasing behaviors, revealing the motivations and preferences that influence consumers' choices during the avocado purchasing process.

Discussion Topics



Before the Store: What drives shoppers to add avocados to their lists



At the Store: How shoppers choose avocados and make purchase decisions



After the Store: How shopper satisfaction alters future purchase decisions

Methodology

819 Online Surveys

- 56% Female, 44% Male
- Ages 25+
- Nationwide
- Representative mix of ethnicities
- Representative mix of household income
- Households with and without children
- Conducted June 3 – June 12, 2025

Among avocado shoppers who:

- Are primary grocery shopper or share responsibility
- Purchased avocados in the past 30 days
- Shop in-person for avocados (no online purchases)

Study Development: Fusion (GoWithFusion.com)

Shopper Segment Definitions

Methodology

The quantitative investigation of this study involves a deeper dive into the buyer segments of avocado shoppers. Throughout the study, comparisons were broken out regarding purchase frequency (Heavier and Lighter buyers) and region (Eastern and Western buyers).

Segments by Purchase Frequency

Heavier Buyers: n = 685

Identified as those who purchase avocados:

- Every month
- More than once per month

Lighter Buyers: n = 134

Identified as those who purchase avocados:

- A couple times per year
- Every other month

Segments by Region

Western Buyers: n = 299

Identified as those who live in the following states in the Western U.S.:

- AZ, CA, CO, ID, KS, MT, NE, NV, NM, ND, OK, OR, SD, TX, UT, WA, WY

Eastern Buyers: n = 520

Identified as those who live in the following states in the Eastern U.S.:

- AL, AR, CT, DE, FL, GA, IA, IL, IN, KY, LA, MA, MD, ME, MI, MN, MS, MO, NC, NH, NJ, NY, OH, PA, RI, SC, TN, VA, VT, WI, WV



Notes on Analysis — Statistical Significance Coding

Statistical significance indicates whether a difference between groups is reliable rather than due to chance. In this report, capital letters denote differences that are statistically significant at the 95% confidence level, while lower-case letters indicate significance at the 90% level. Both thresholds represent a high degree of reliability.

Statistical Significance Codes				
	Heavier Buyers	Lighter Buyers	Western Buyers	Eastern Buyers
95% Confidence Level	H	L	W	E
90% Confidence Level	h	l	w	e

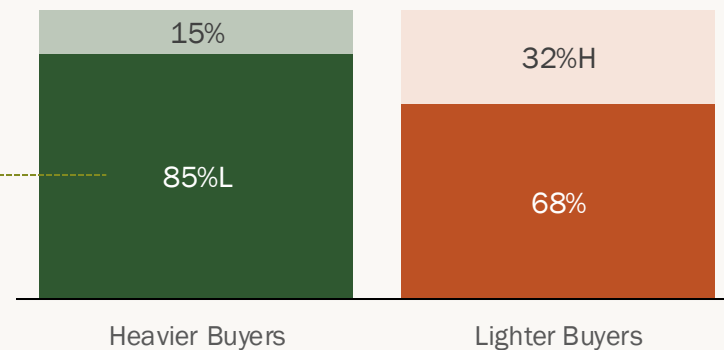
Example

85% of Heavier buyers plan their avocado purchase before shopping compared to 68% of Lighter buyers.

The capital 'L' next to the 85% signifies that this 17-point difference is statistically reliable and reflects a true distinction between the two groups, not just random variation.

Decision to Purchase Avocados
by Purchase Frequency

■ At the Store
■ Before the Store



Summary

Before the Store

- Shoppers prioritize ripeness, firmness, and visual cues when selecting avocados. However, when prompted only 50% of shoppers could select a ripe avocado by sight.
- Heavier buyers showed greater confidence when selecting their preferred avocados than Lighter buyers.
- Shopper preference shows a shift in avocado versatility with a sharp rise in purchasing a mix of sizes since 2015, indicating an evolution in avocado habits and integration into their daily household routine.
- Despite high confidence in picking the right size, shoppers state they struggle with selecting avocados with the best taste, reinforcing the importance of clear displays and helpful visual in-store cues.

At the Store

- Avocados are a planned purchase for most shoppers, with lists and routines driving avocado purchase trips.
- Lighter buyers often act on impulse, triggered by eye-catching displays, while Heavier buyers more often respond to freshness cues in-store.
- Visual freshness and ripeness are key purchase drivers, leading shoppers to buy more than planned, even when avocados aren't on their shopping list.
- Bulk remains the preferred format as shoppers seek better control over ripeness, size, and spend.
- Bagged avocados are increasingly present in stores, but inconsistent placement and availability are barriers for those who prefer them.
- In-store experience often falls short of expectations. Freshness and other display factors ranked high in importance but fell short during the in-store experience.

After the Store

- Heavier buyers are more likely to use avocados the same day as purchased, indicating more immediate and frequent usage in their daily routines.
- Issues on the path to purchase avocados typically arise before shoppers return home with their purchase. Nearly all avocado shoppers reported satisfaction with their avocados once they returned home.
- A satisfying avocado purchase drives action, with more than two-thirds of shoppers planning future purchases or adjusting their planned usage.
- Heavier and Eastern buyers are especially likely to act after a positive experience, including increased usage and confidence in future avocado selections.

Key Insights

A rise in planned avocado purchases reflects the category's role as a household staple

Since 2015, shoppers are increasingly treating avocados as a routine, planned purchase that make the grocery list. This shift is especially evident among Heavier buyers, who use avocados regularly and incorporate them into daily meals. Positive shopping experiences reinforce this behavior, encouraging shoppers to include avocados on their grocery lists and make repeat purchases. Since avocados have become more of a household staple, satisfaction with quality and availability plays a critical role in maintaining shopper loyalty. Consistently delivering fresh, appealing avocados will help continue to strengthen this transition from occasional treat to everyday staple. Fostering routine purchasing behavior supports sustained category growth and consumer satisfaction.

Inconsistent placement of bagged avocados turns a convenience item into an inconvenience

Bagged avocados are gaining popularity. 52% of Heavier buyers and 37% of Lighter buyers now purchase bulk and bagged avocados. This was an increase of +40 points for Heavier and +34 points for Lighter buyers vs. 2015. However, many shoppers who prefer to purchase them do not see them in store or find it difficult to locate them. This lack of visibility especially affects Heavier buyers who often seek the convenience that bagged options provide. Inconsistent placement and limited availability are barriers to purchase for bagged avocado shoppers. A clear, prominent display of both bulk and bagged avocados is crucial to meeting shopper expectations. Retailers may risk losing bagged avocado sales if shoppers encounter bulk first and select their avocados before seeing a bag.

In-store displays matter more to today's avocado shopper and are vital to meeting shopper expectations

The avocado display plays a larger role in the decision to purchase avocados today than in the past. Shoppers expect fresh avocados, abundant selection, and well-marked signage. However, many avocado shoppers said that their in-store experience did not meet their expectations. While 93% said fresh appearance of avocados is important, only 59% found this to be true on their last shopping trip (a 34-point gap). Among Heavier buyers, abundant selection of avocados showed the widest gap (47-point difference) between importance and in-store experience. Additionally, 70% of Heavier buyers value well-marked signage, while only 41% found signage in store during their last trip. Display signage can be a valuable tool for educating the shopper on nutrition, recipes, avocado selection, and ripeness cues. For example: 83% of Heavier buyers were confident in their ability to judge ripeness, but half of Heavier buyers could not correctly identify a perfectly ripe avocado by sight. Marketers and retailers that leverage these key findings can close the gaps in shopper expectations, improve shopper education, and drive sales of Hass avocados.



Before the Store

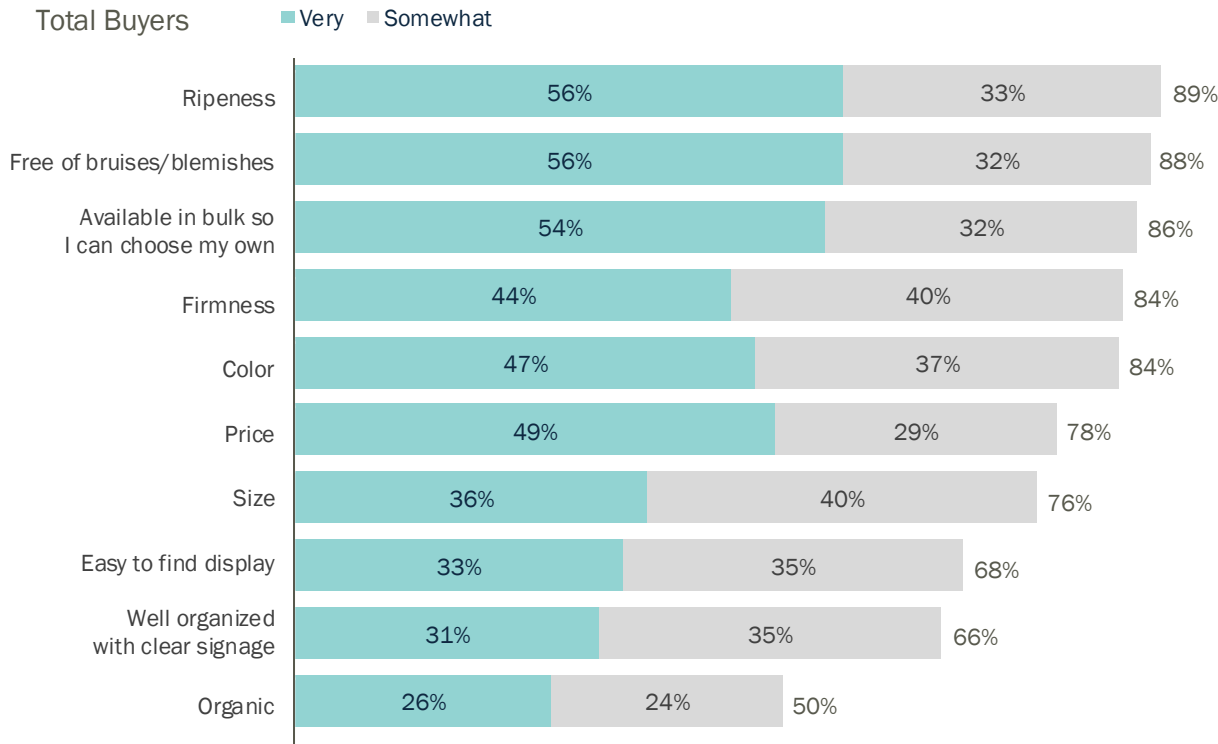
Shopper Preferences

Detailed Findings

When purchasing avocados, most shoppers rated ripeness and visual appearance as important

Factors that imply quality were widely considered to be important

Avocado Purchase Factors Ranked by Breadth of Importance



Organic is important to half of avocado shoppers, but it is of greater importance among Eastern buyers

54%(W) of Eastern buyers consider organic to be important compared to 43% of Western buyers, an +11-point gap



Before the Store

Base Total Avocado Purchasers

Q1. Please rate the following statements on a 5-point scale (of importance), when purchasing avocados.

Ripeness and visual appeal rank as top factors, while price fell in importance for Heavier buyers

Avocado Attribute Importance by Purchased Frequency	Heavier Buyers	Change vs. 2015	Lighter Buyers	Change vs. 2015
Ripeness	88%	—	90%	—
Free of bruises and blemishes	87%	—	89%	—
Available in bulk	86%	↑ 2	84%	↑ 1
Firmness	86%L	↓ 1	78%	↓ 3
Color	84%	↑ 2	84%	↑ 1
Size	77%L	—	69%	↓ 2
Price	76%	↓ 3	87%H	↑ 1
Easy to find display	70%L	↑ 1	59%	—
Well organized display with clear signage	66%	↑ 2	63%	↑ 2
Organic	51%	↓ 1	44%	↓ 1

Differences of importance emerged between Heavier and Lighter buyers

The largest of these differences was for:

Heavier Buyers

Easy to find display
+29 pts. higher than Lighter

Lighter Buyers

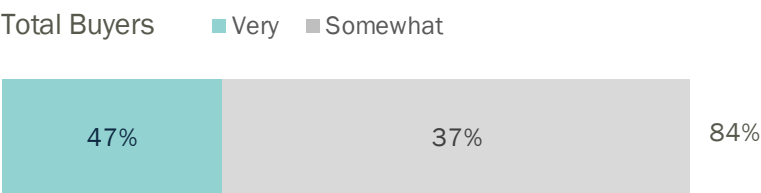
Price
+11 pts. higher than Heavier



Before the Store

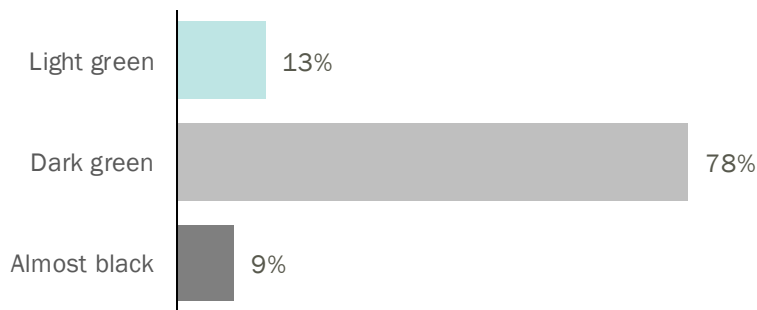
Shoppers who indicated that color was important preferred to purchase dark green avocados

Color Importance When Purchasing Avocados



Color Preference

(of those who said color was important)



Regional differences were noted in the color preference of avocados

Dark green avocados are preferred by both regional buyer groups, with a stronger preference among Eastern buyers (+9 points). Almost black avocados are more preferred among Western buyers (+8 points)

Color Preference by Region*	Western Buyers	Eastern Buyers
Light green	14%	13%
Dark green	72%	81%W
Almost black	14%E	6%

**of those who said color was important*



Before the Store

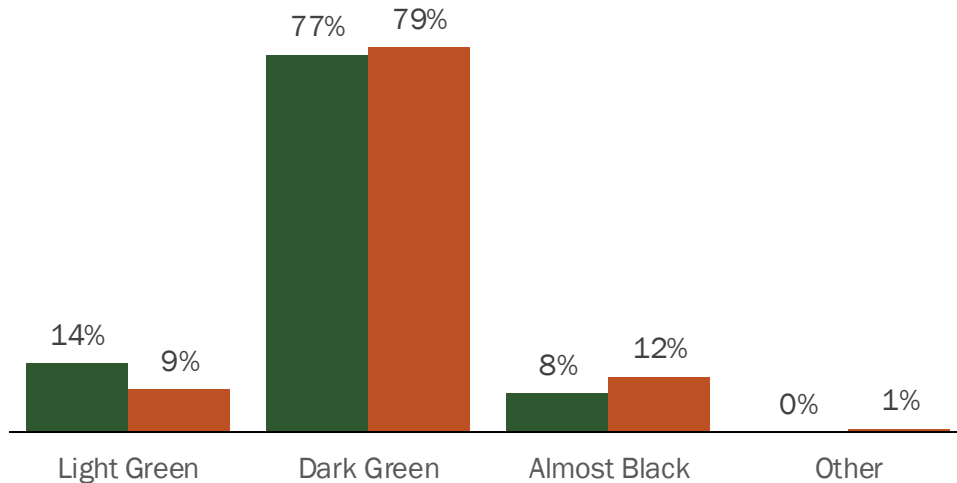
Of those who indicated color was very or somewhat important in Q1
Q1. Please rate the following statements on a 5-point scale (of importance), when purchasing avocados.
Q2. What color avocados do you prefer to purchase for your household?

Preference for dark green avocados grew among both Heavier and Lighter buyers since 2015

Color Preference

by Purchase Frequency (of those who said color was important)

■ Heavier Buyers ■ Lighter Buyers



Change vs. 2015	Heavier Buyers	Lighter Buyers
Light green	-6 pts.	-2 pts.
Dark green	+7 pts.	+6 pts.
Almost black	-1 pt.	-2 pts.
Other	-1 pt.	-1 pt.



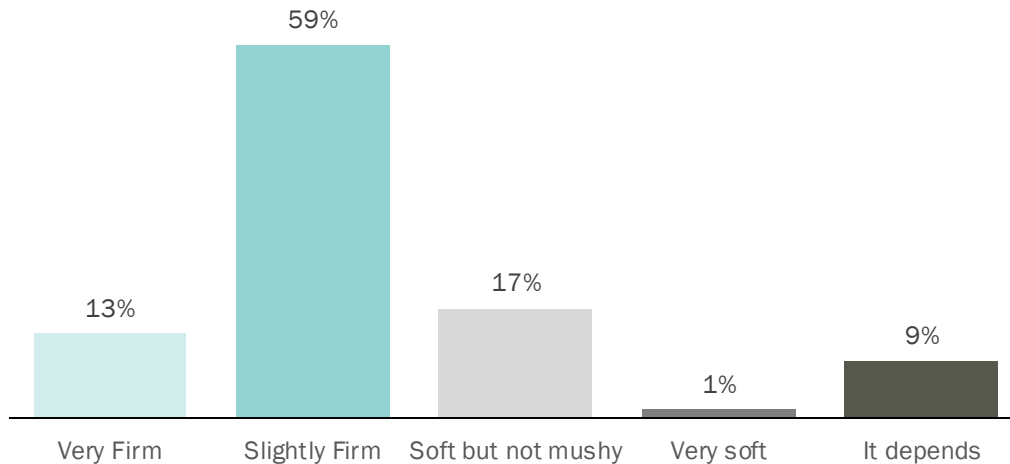
Before the Store

Of those who indicated color was very or somewhat important in Q1
Q1. Please rate the following statements on a 5-point scale (of importance), when purchasing avocados.
Q2. What color avocados do you prefer to purchase for your household?

Three out of five shoppers who rated firmness as important said they prefer slightly firm avocados

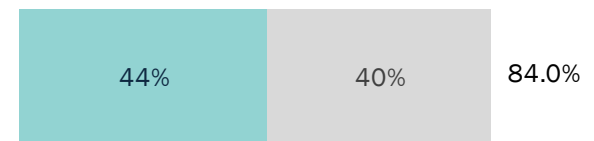
Firmness Preference

Total Buyers (of those who said firmness was important)



Firmness Importance When Purchasing Avocados

Total Buyers



Slightly Firm: some give when gently squeezed, but still feels dense



Before the Store

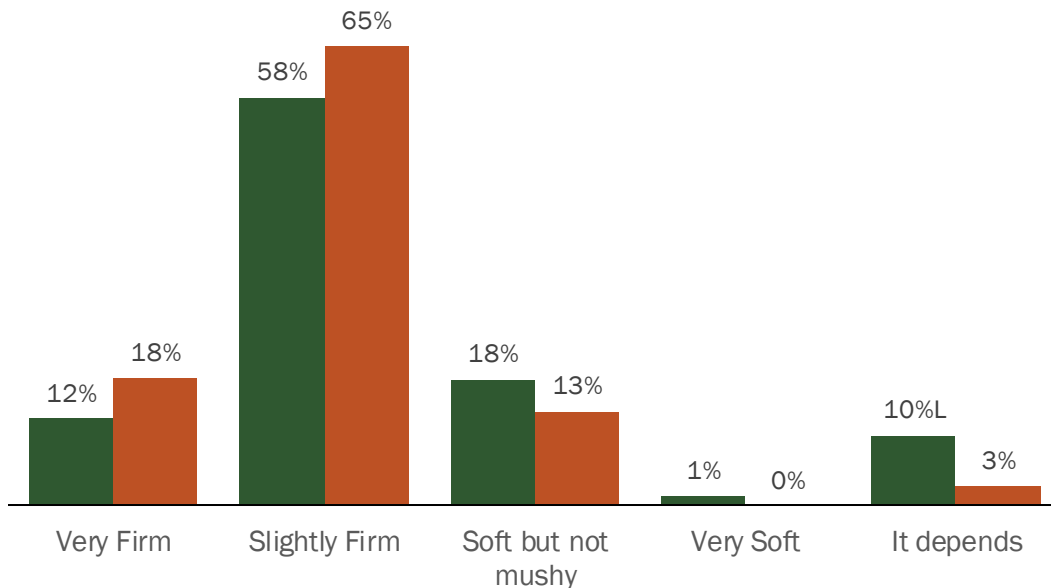
Of those who indicated firmness was very or somewhat important in Q1
Q1. Please rate the following statements on a 5-point scale (of importance), when purchasing avocados.
Q3. Which level of firmness do you most often look for?

Heavier buyers are more likely to consider firmness as important and select more firm options

Firmness Preference

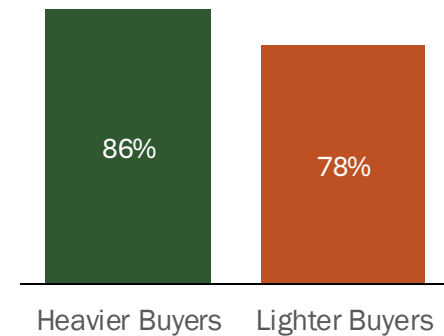
by Purchase Frequency (of those who said firmness was important)

■ Heavier Buyers ■ Lighter Buyers



Firmness Importance

by Purchase Frequency
(share of Total Buyers)



Avocado firmness is more important to Heavier buyers

Nearly 9 out of 10 Heavier buyers said firmness was important, while only 8 out of 10 Lighter buyers agreed



Before the Store

Of those who indicated firmness was very or somewhat important in Q1
Q1. Please rate the following statements on a 5-point scale (of importance), when purchasing avocados.
Q3. Which level of firmness do you most often look for?

Medium avocados are preferred among shoppers who consider size important

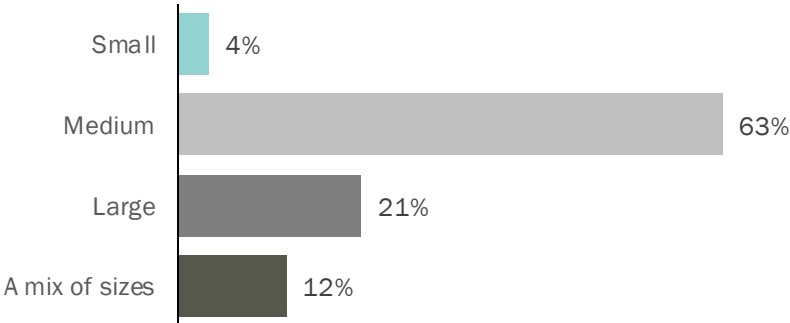
Size Importance When Purchasing Avocados

Total Buyers ■ Very ■ Somewhat



Size Preference

(of those who said size was important)



Size Preference by Region*	Western Buyers	Eastern Buyers
Small	3%	4%
Medium	63%	63%
Large	25%e	19%
A mix of sizes	9%	14%w

*of those who said size was important

The preference to purchase a mix of sizes was higher among Eastern than Western buyers

Eastern avocado buyers' preference to buy a mix of sizes was +5 points higher in the East than the West



Before the Store

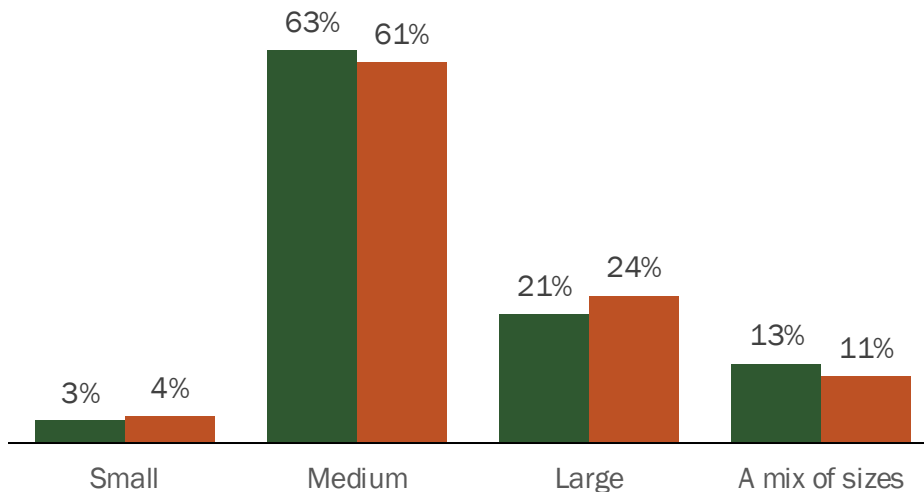
Of those who indicated size was very or somewhat important in Q1
Q1. Please rate the following statements on a 5-point scale (of importance), when purchasing avocados.
Q4. Which size do you prefer for your household?

Since 2015, size preference swung drastically from large to medium avocados by over thirty points

Size Preference

by Purchase Frequency (of those who said size was important)

■ Heavier Buyers ■ Lighter Buyers



Change vs. 2015	Heavier Buyers	Lighter Buyers
Small	-10 pts.	-7 pts.
Medium	+38 pts.	+35 pts.
Large	-38 pts.	-35 pts.
A mix of sizes	+10 pts.	+7 pts.

Purchasing a mix of sizes surged since 2015, which may indicate an increase in varied and creative usage of avocados

The preference to purchase a mix of avocado sizes is up +10 points with Heavier buyers and +7 points for Lighter buyers since 2015



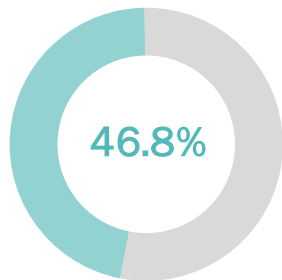
Before the Store

Of those who indicated size was very or somewhat important in Q1
Q1. Please rate the following statements on a 5-point scale (of importance), when purchasing avocados.
Q4. Which size do you prefer for your household?

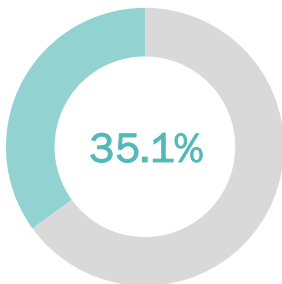
Avocado shoppers who purchase a mix of sizes do so because of availability or intended use

Why do shoppers purchase a mix of sizes?

(of those who purchase a mix of sizes)



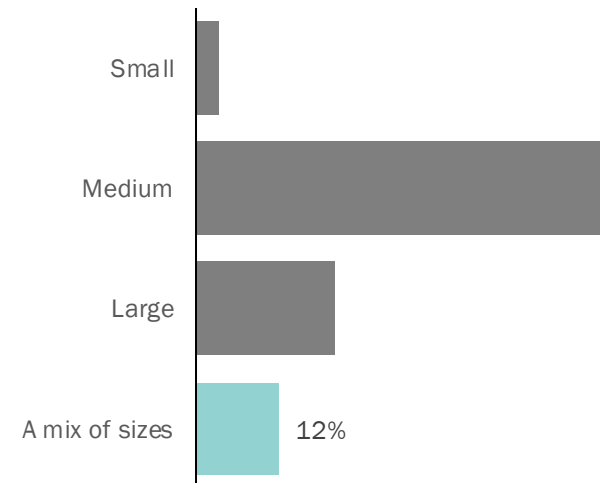
It depends on availability



It depends on what I'm using it for

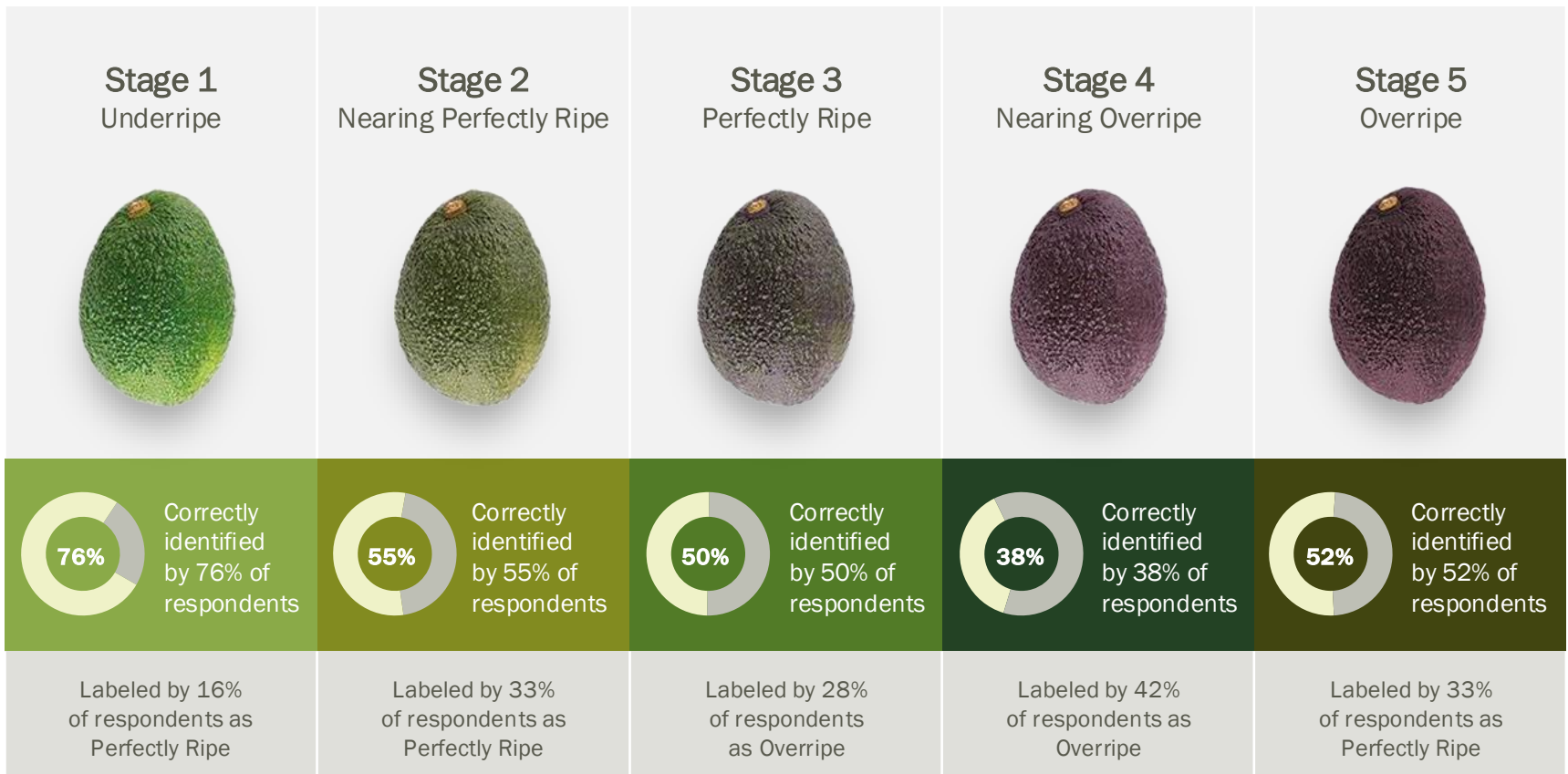
Size Preference

(of those who said size was important)



Before the Store

Half of avocado shoppers incorrectly identified the perfectly ripe Hass avocado by sight



Before the Store

While many shoppers correctly identified underripe avocados, about half could identify the later stages

Stages of Ripeness (% correctly identified)		Heavier Buyers	Lighter Buyers	Western Buyers	Eastern Buyers
	Underripe Stage 1	76%	80%	80%E	74%
	Nearing Perfectly Ripe Stage 2	54%	58%	59%e	53%
	Perfectly Ripe Stage 3	50%	51%	54%	48%
	Nearing Overripe Stage 4	43%	37%	47%E	33%
	Overripe Stage 5	54%	51%	49%	53%

Lighter buyers correctly identified the earlier stages of ripeness more often than Heavier buyers, while Heavier buyers were more often correct in identifying later stages of ripeness

Western buyers correctly identified the earlier stages of ripeness more often than Eastern buyers, while Eastern buyers were more often correct in identifying overripe avocados



Before the Store

While more than half of shoppers prefer perfectly ripe avocados, one quarter buy a mix of ripeness

Preferred Stage of Ripeness

Total Buyers



Of shoppers who prefer to purchase a mix of avocados at various stages of ripeness, more than half said the primary driver is to have avocados available for immediate and later use

Why do shoppers buy a mix of ripeness?	Reason Share
Immediate use vs. later use	51%
Usage-based planning	21%
Staggered ripeness to avoid waste	14%
Budgeting or convenience	7%
Personal or family preference	7%

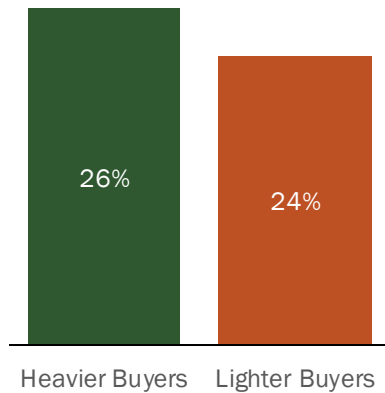


Before the Store

Base Total Avocado Purchasers; Of those who prefer a mix of ripeness in Q7
Q7. At what level of ripeness do you prefer to purchase your avocados?
Q8. Why do you buy a mix of avocados at various stages of ripeness?

Usage-based planning is growing as a driver for shoppers that buy a mix of ripeness

Share of those who prefer to buy a mix of ripeness by Purchase Frequency



Reasons to buy a mix of ripeness (of those who prefer a mix of ripeness)	Heavier Buyers	Change vs. 2015	Lighter Buyers	Change vs. 2015
Immediate vs. later use	50%	–	53%	-1 pt.
Usage-based planning	22%	+13 pts.	13%	+6 pts.
Staggered ripeness to avoid waste	14%	+9 pts.	16%	+7 pts.
Budgeting or convenience	7%	n/a	9%	n/a
Personal or family preference	7%	n/a	9%	n/a

Change vs. 2015	Heavier Buyers	Lighter Buyers
Prefer to buy a mix of ripeness	+2 pts.	+6 pts.

While immediate vs. later use remains the top reason for preferring a mix of ripeness, 1 out of 5 Heavier buyers do so for usage-based planning, up +13 pts. since 2015.



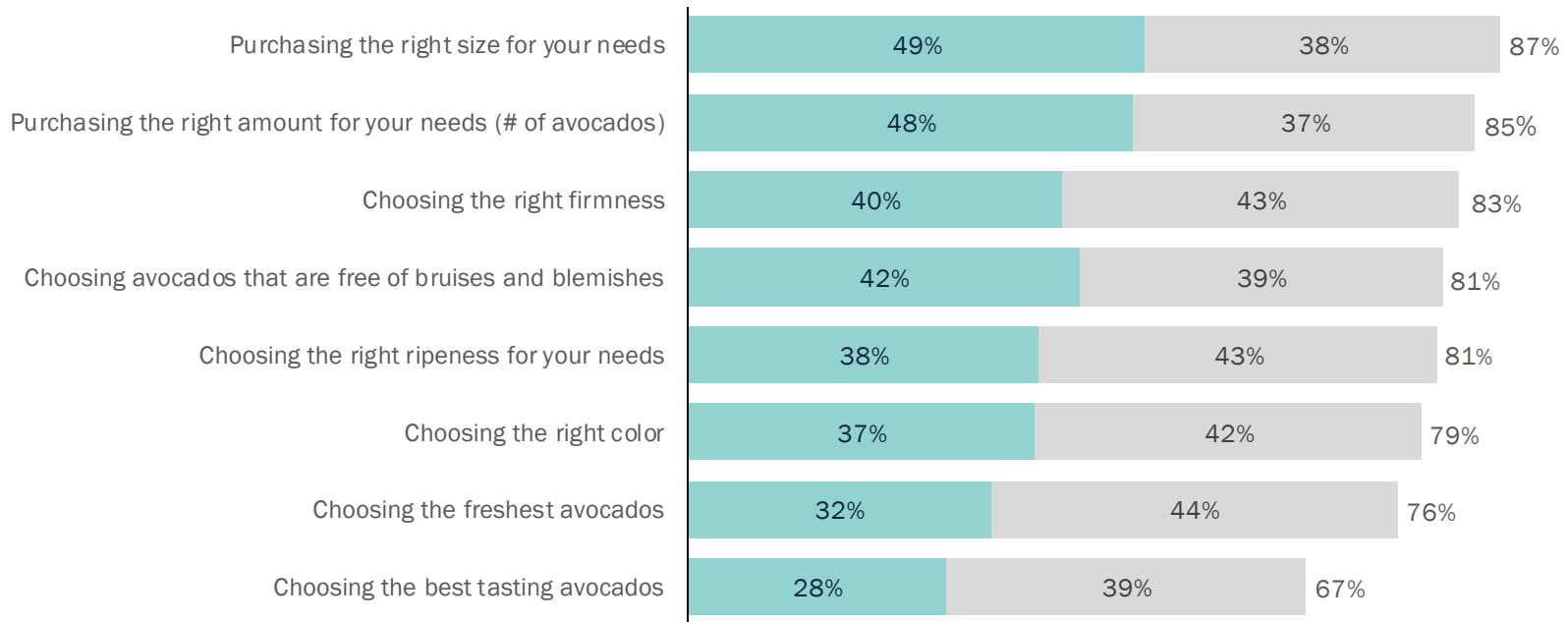
Before the Store

Shopper confidence is high for buying the right size, but low in choosing the best tasting avocados

How confident are shoppers when purchasing avocados?

Total Buyers

■ Very ■ Somewhat



About 87% of shoppers said they were very or somewhat confident in purchasing the right size for their needs, while only 67% were confident in choosing the best tasting avocados

81% of shoppers said they are confident in choosing the right ripeness for their needs, yet only 50% correctly identified the perfectly ripe avocado by picture (slide 18)



Before the Store

Heavier and Western buyers have greater confidence in their avocado selections

Shopper Confidence by Purchase Frequency (rated extremely or somewhat confident)	Heavier Buyers	Lighter Buyers	Western Buyers	Eastern Buyers
Purchasing the right size for your needs	89%L	81%	88%	87%
Choosing the right firmness	85%L	70%	84%	82%
Purchasing the right amount for your needs (# of avocados)	85%	81%	85%	84%
Choosing the right ripeness for your needs	83%L	69%	82%	79%
Choosing avocados that are free of bruises and blemishes	82%L	74%	80%	82%
Choosing the right color	81%L	69%	81%	78%
Choosing the freshest avocados	79%L	63%	75%	77%
Choosing the best tasting avocados	69%L	52%	70%	65%

*Change in Confidence
Choosing Ripeness
vs. 2015*

Heavier Buyers: -4 pts.
Lighter Buyers: -2 pts.

*More than 8 out of 10 Heavier buyers are confident in choosing the right ripeness,
but only 7 out of 10 Lighter buyers are confident about their choices*

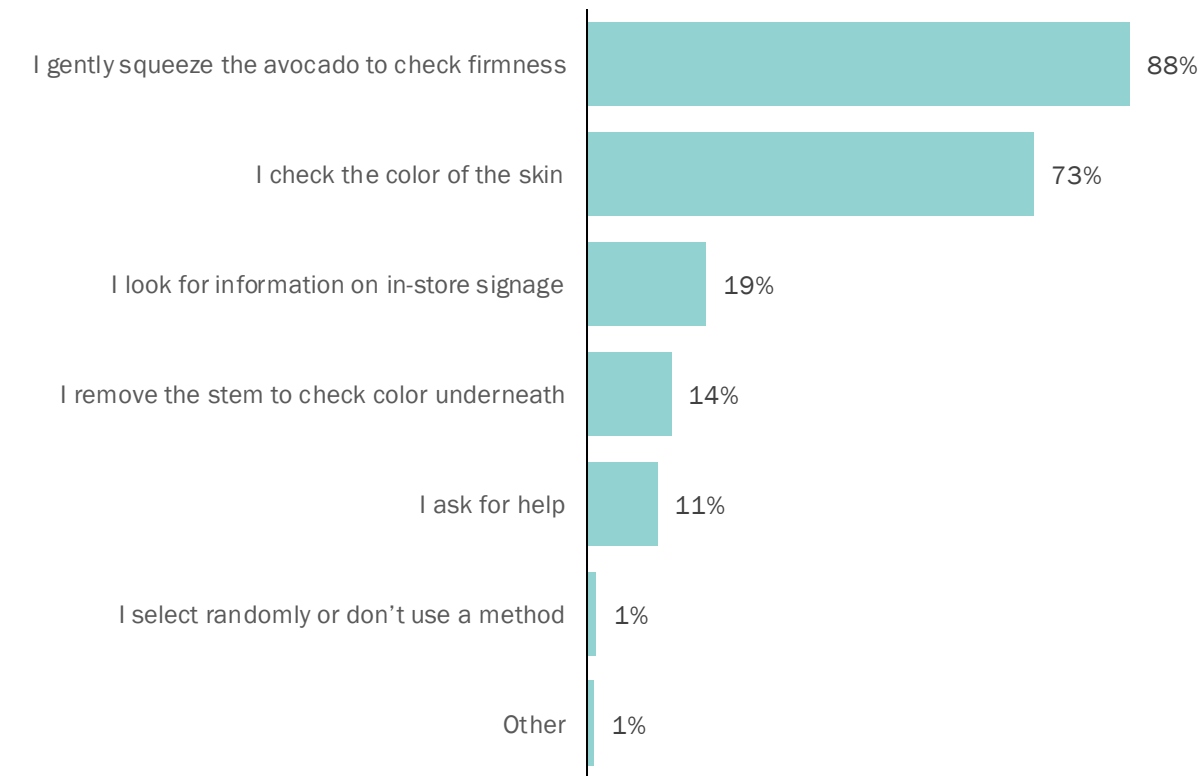


Before the Store

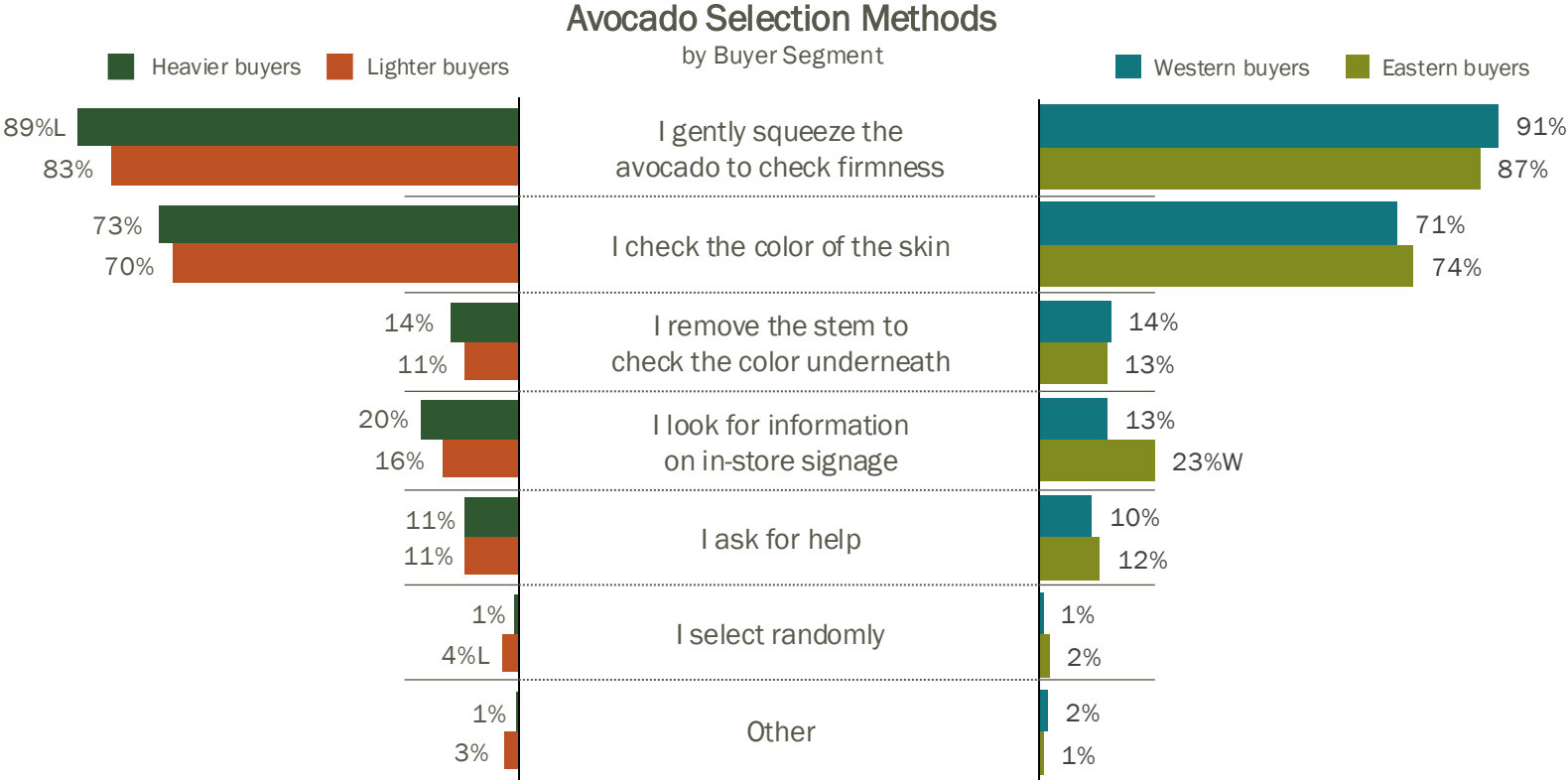
The preferred methods for selecting avocados are by touching for firmness or checking color of the skin

What method do shoppers use when selecting avocados?

Total Buyers



Firmness and color are top selection methods, while in-store signage is more important for Eastern buyers



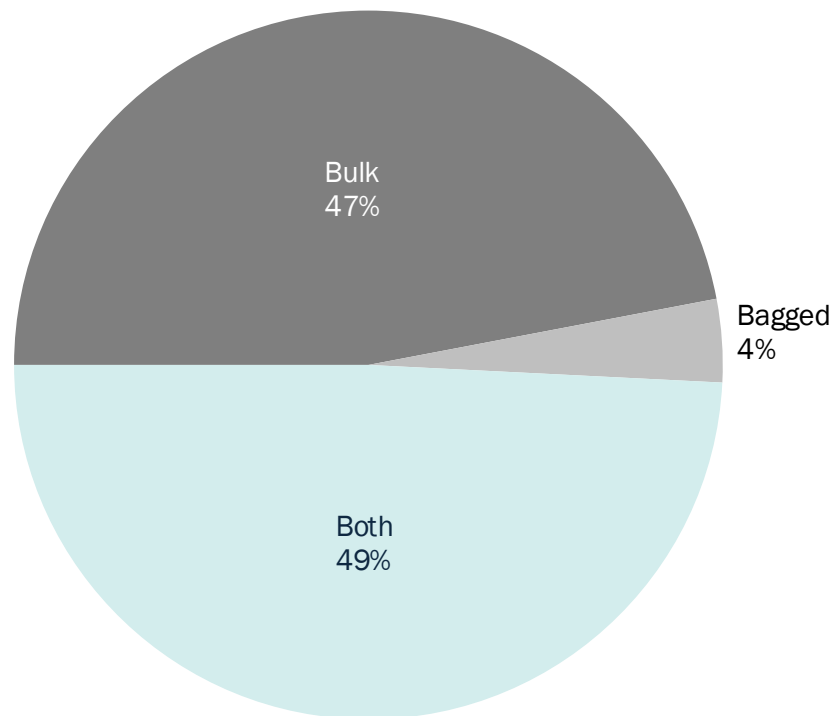
Squeezing avocados to check firmness is +6 points higher among Heavier buyers

Looking for information on in-store signage is +10 points higher among Eastern buyers

Nearly half of avocado shoppers prefer to purchase 'Both' bulk and bagged avocado formats

Shopper Preference of Avocado Format

Total Buyers



***Both:** preference to purchase both bulk and bagged avocados during the year, not necessarily in the same purchase trip*



Before the Store

The percentage of shoppers that prefer avocados in 'Both' formats jumped +40 pts. since 2015

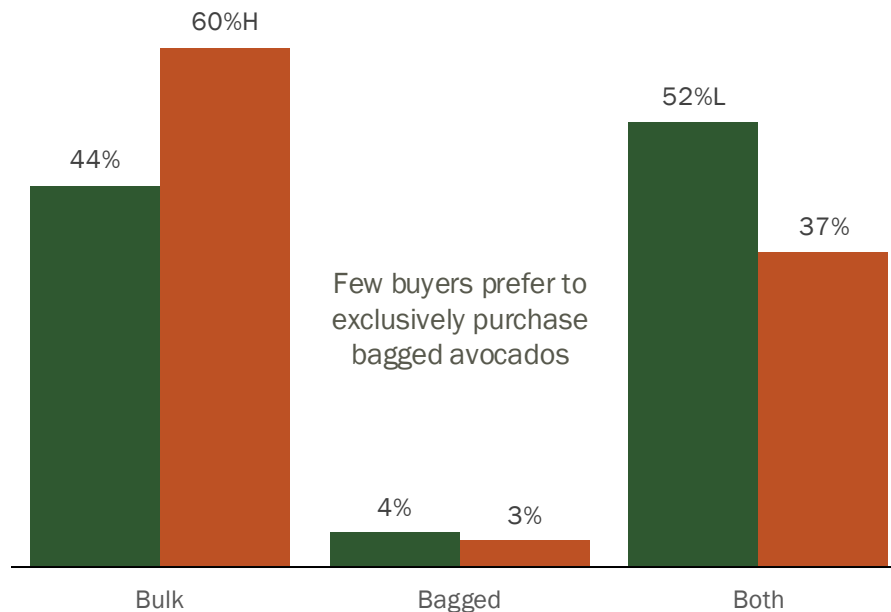
'Both' is a preference to purchase both bulk and bagged avocados during the year, not necessarily in the same purchase trip

Preferred Avocado Format

by Purchase Frequency

■ Heavier Buyers

■ Lighter Buyers



Change vs. 2015	Heavier Buyers	Lighter Buyers
Bulk	-26 pts.	-33 pts.
Bagged	-14 pts.	-2 pts.
Both	+40 pts.	+34 pts.

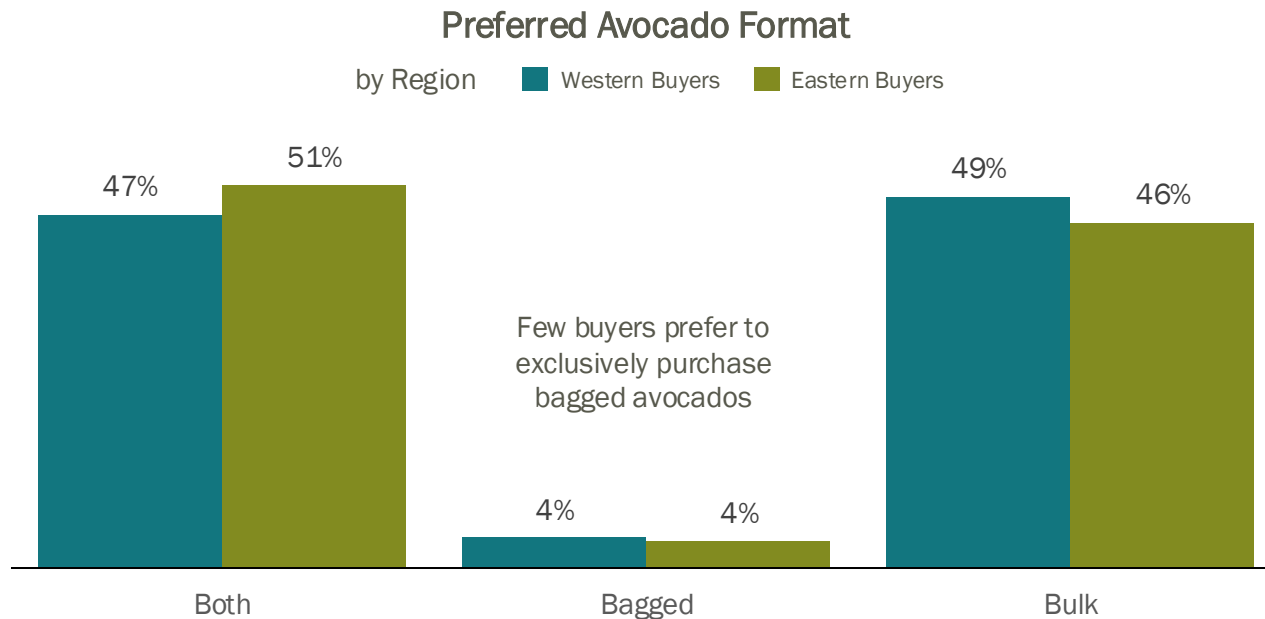
More than half of Heavier buyers prefer to purchase 'Both' bagged and bulk avocados while 6 out of 10 Lighter buyers purchase bulk avocados



Before the Store

Preference for purchasing 'Both' avocado formats is stronger among Eastern buyers

'Both' is a preference to purchase both bulk and bagged avocados during the year, not necessarily in the same purchase trip

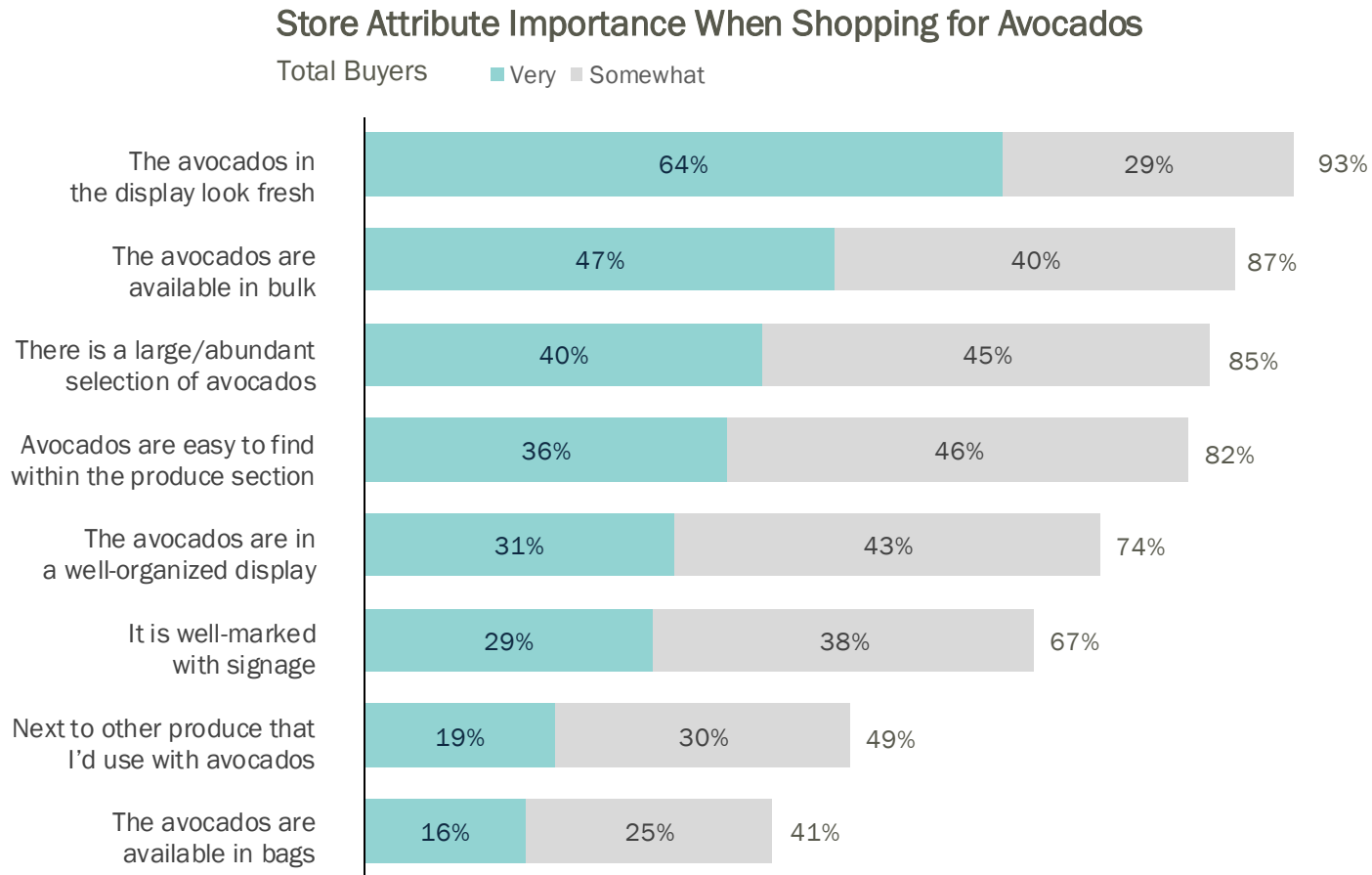


Preference among Eastern buyers to purchase 'Both' bulk and bagged avocados is +4 points higher than Western buyers



Before the Store

Fresh appearance and wide selection are high on the list of importance when shopping for avocados



Before the Store

The avocado display has become important to more avocado shoppers today than in the past

Store Attribute Importance When Shopping for Avocados by Purchase Frequency (very or somewhat important)	Heavier Buyers	Change vs. 2015	Lighter Buyers	Change vs. 2015
The avocados in the display look fresh	93%	+3 pts.	93%	+2 pts.
The avocados are available in bulk	87%	+14 pts.	87%	+3 pts.
There is a large/abundant selection of avocados	85%	+12 pts.	83%	+15 pts.
Avocados are easy to find within the produce section	84%L	+9 pts.	74%	+2 pts.
The avocados are in a well-organized display	74%	+16 pts.	70%	+22 pts.
It is well marked with signage	70%L	+9 pts.	52%	-2 pts.
The avocados are next to other produce that I'd use with avocados	50%L	-3 pts.	40%	+5 pts.
Avocados are available in bags	42%	+8 pts.	35%	+24 pts.

*Many avocado display factors are important to more shoppers today than in the past,
with the largest increases in importance noted in display organization and abundant selection*



Before the Store

Display layout and adequate signage are more important to Eastern buyers than Western buyers

Store Attribute Importance When Shopping for Avocados by Region	Western Buyers	Eastern Buyers
The avocados in the display look fresh	91%	93%
The avocados are available in bulk	86%	88%
There is a large/abundant selection of avocados	84%	84%
Avocados are easy to find within the produce section	80%	84%
The avocados are in a well-organized display	69%	76%W
It is well marked with signage	64%	69%
The avocados are next to other produce that I'd use with avocados	48%	49%
Avocados are available in bags	39%	42%

Availability of bagged avocados is more important to Eastern buyers



Before the Store

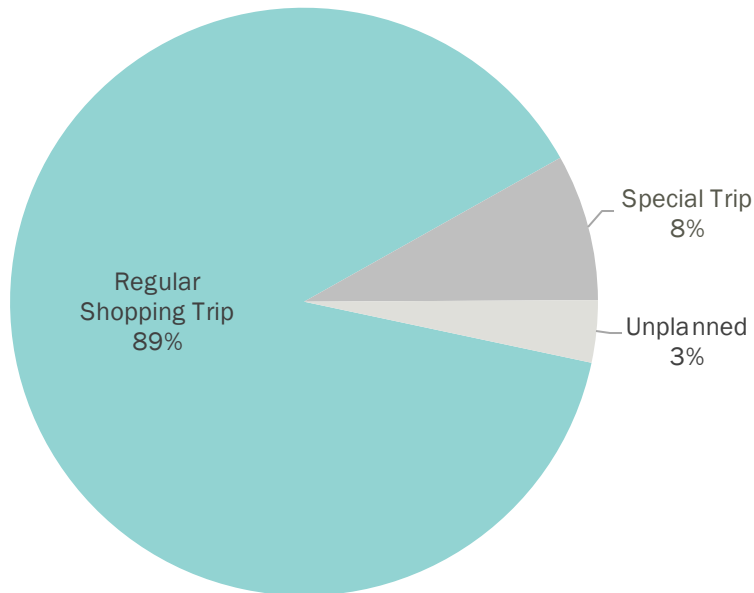
At the Store

Shopper Experiences

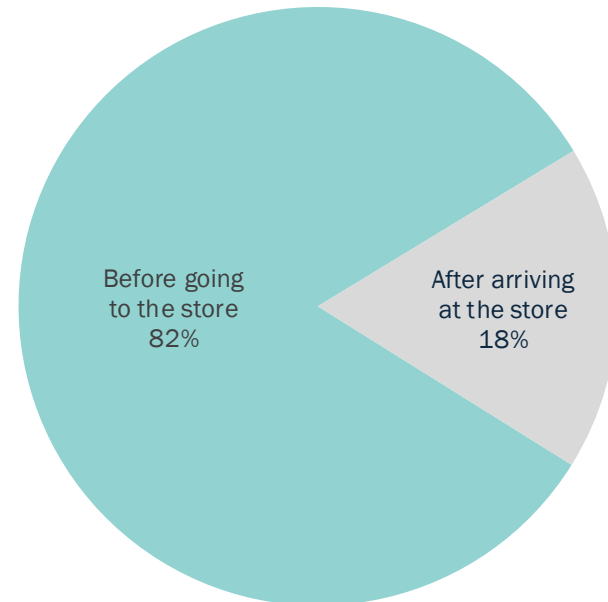
Detailed Findings
of Last Purchase

Avocados were a pre-planned purchase on regular shopping trips for most shoppers

Type of Last Shopping Trip
That Included Avocados
Total Buyers



Decision to Purchase Avocados
Total Buyers



At the Store

For most shoppers, their last avocado purchase was during a regular shopping trip

Type of Last Shopping Trip by Buyer Segment	Heavier Buyers	Lighter Buyers	Western Buyers	Eastern Buyers
Regular Shopping Trip	90%l	84%	90%	88%
Special Trip	7%	12%h	7%	8%
Impulse Trip	3%	4%	3%	4%

Heavier buyers favored routine trips, while Lighter buyers were more likely to make a special trip

Regular trips for Heavier buyers was +6 points higher than Lighter buyers, while special trips for Lighter buyers were +5 points higher than Heavier buyers



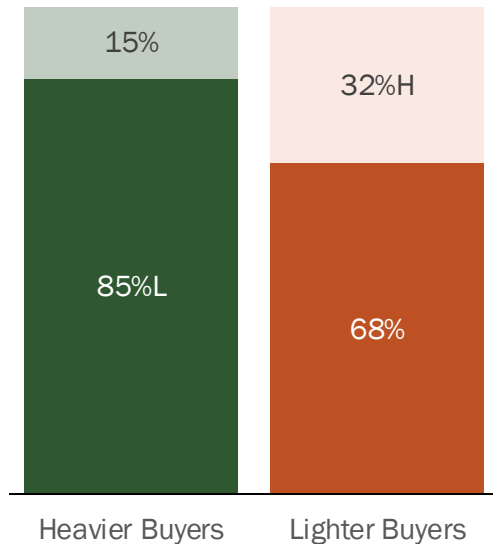
At the Store

A surge in planned purchases shifts avocados from an impulse buy toward an everyday staple

Decision to Purchase Avocados

by Purchase Frequency

■ Before the Store ■ At the Store



Change vs. 2015	Heavier Buyers	Lighter Buyers
Before the Store	+19 pts.	+17 pts.
At the Store	-19 pts.	-17 pts.

Planned purchases have climbed nearly +20 points for both Heavier and Lighter buyers since 2015

The sharp rise in pre-store planning indicates that avocados are becoming part of the routine for both buyer segments

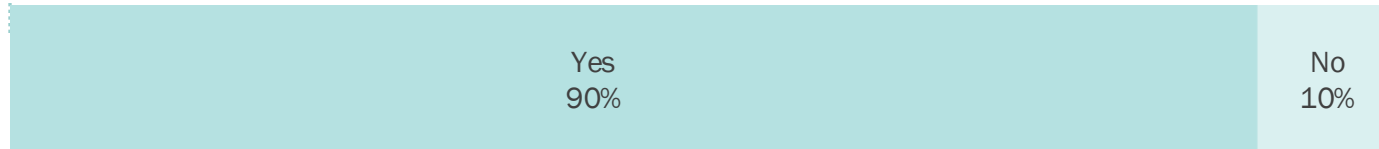


Most shoppers prepared a shopping list, and nine out of ten lists included avocados

Did shoppers prepare a shopping list? Total Buyers



Were avocados on that shopping list? (of those who prepared a list)



Eastern buyers are more likely to make a shopping list

By Region	Western Buyers	Eastern Buyers
Yes, made a list	83%	87%
Yes, avocados were on the list	90%	91%



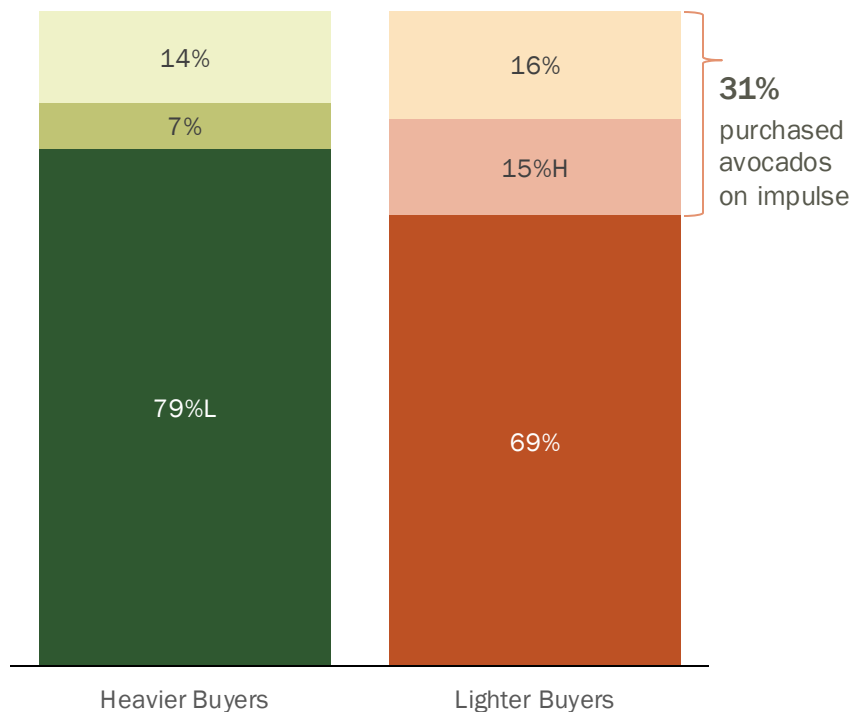
At the Store

Adding avocados to the shopping list has become more common for both shopper groups

Did shoppers prepare a list that included avocados?

by Purchase Frequency

- Did not make a list
- Made list without avocados
- Made list & included avocados



Change vs. 2015

	Heavier Buyers	Lighter Buyers
Made list & included avocados	+19 pts.	+24 pts.
Made list without avocados	+6 pts.	+14 pts.
Did not make a list	-25 pts.	-38 pts.

Since 2015, Heavier buyers saw a +19-pt. increase in the number of buyers that include avocados on the shopping list, while Lighter buyers saw a +24-pt. increase



Many Heavier buyers consider avocados a staple, while Lighter buyers are driven largely by cravings

Why were avocados added to the list?	Heavier Buyers	Lighter Buyers
They are a staple on my shopping list	40%L	14%
I had a specific meal in mind	37%	38%
I had a craving for them	37%	41%
I knew I didn't have any left	32%L	18%
They're quick and easy to use/prepare	31%	28%
I needed them for a recipe	30%	33%
I thought they'd be good to have on hand	19%L	11%
My spouse or other adult asked for them	17%	12%
My kid(s) asked for them	12%L	5%
Having friends over/party/special occasion	11%	10%
I thought someone in my family would like them	10%	7%
I saw on the store app that they were on sale	8%	7%
I saw an advertisement for them	8%	9%
I wanted something different	7%	9%
I hadn't had one in a while	7%	18%H
I saw a video or blog about using/eating them	5%	3%
I got an email or text from the store about a sale	3%	2%

Cravings, meal planning, and recipes drive Lighter buyers to add avocados to the list



At the Store

Fresh appearance and recipes influence buyers to follow through on their planned purchases in-store

Top 8 Planned Purchase Decision Influencers	Heavier Buyers	Ranking in 2015
1 They looked fresh	43%L	n/a
2 I needed them for a recipe	36%	+5 pts.
3 I knew I didn't have any left	34%I	+2 pts.
4 They're quick/easy to prepare	34%	-1 pt.
5 I had a craving for them	29%	-2 pts.
6 They are in season	18%	n/a
7 I thought they would be good to have on hand	17%	-6 pts.
8 I just remembered I needed them	15%	n/a

Top 8 Planned Purchase Decision Influencers	Lighter Buyers	Ranking in 2015
1 I needed them for a recipe	43%	+10 pts.
2 They looked fresh	32%	n/a
3 I had a craving for them	31%	-2 pts.
4 They're quick/easy to prepare	26%	+5 pts.
5 I knew I didn't have any left	24%	n/a
6 I hadn't had one in a while	21%H	+3 pts.
7 I thought they would be good to have on hand	18%	+10 pts.
8 They are in season	15%	n/a



At the Store

Fresh-looking avocados triggered impulse purchases among Heavier buyers, while striking displays attracted Lighter buyers

Top 8 Impulse Purchase Decision Influencers	Heavier Buyers	Ranking in 2015
1 They looked fresh	47%	+1 pt.
2 I thought they would be good to have on hand	37%	+17 pts.
3 I passed them in the aisle, and they caught my eye	35%	+3 pts.
4 I had a craving for them	28%	+4 pts.
5 They're quick/easy to prepare	26%	+5 pts.
6 I knew I didn't have any left	20%	-1 pt.
7 There was an advertised/promotional price	18%	+12 pts.
8 They are in season	17%	n/a

Top 8 Impulse Purchase Decision Influencers	Lighter Buyers	Ranking in 2015
1 I passed them in the aisle, and they caught my eye	40%	+8 pts.
2 They looked fresh	37%	-3 pts.
3 I had a craving for them	35%	+6 pts.
4 I hadn't had one in a while	33% ^H	+8 pts.
5 There was a sale on produce items	21%	+1 pt.
6 I thought they would be good to have on hand	21%	+5 pts.
7 Special display in or near the produce aisle	19%	+15 pts.
8 They're quick/easy to prepare	16%	-2 pts.



At the Store

Of Heavy and Lighter buyers who made impulse purchases in Q14
 Q14. Did you plan to purchase the avocados before going to the store?
 Q18. Which, if any, of the following played a role in your decision to purchase fresh avocados when you were at the store?

Planned purchases for Western buyers are more influenced by cravings than Eastern buyers

Top 8 Planned Purchase Decision Influencers	Western Buyers
1 They looked fresh	41%
2 I knew I didn't have any left	37%e
3 I needed them for a recipe	36%
4 They're quick/easy to prepare	36%
5 I had a craving for them	33%
6 They are in season	19%
7 I thought they would be good to have on hand	19%
8 I just remembered I needed them	17%

Top 8 Planned Purchase Decision Influencers	Eastern Buyers
1 They looked fresh	42%
2 I needed them for a recipe	37%
3 They're quick/easy to prepare	31%
4 I knew I didn't have any left	31%
5 I had a craving for them	28%
6 They are in season	17%
7 I thought they would be good to have on hand	16%
8 I just remembered I needed them	14%



At the Store

Western and Eastern buyers are more likely to purchase on impulse when avocados look fresh

Top 8 Impulse Purchase Decision Influencers	Western Buyers
1 They looked fresh	49%
2 I passed them in the aisle, and they caught my eye	47%E
3 I thought they would be good to have on hand	32%
4 I had a craving for them	28%
5 I hadn't had one in a while	21%
6 There was a sale on produce items	19%
7 They're quick/easy to prepare	19%
8 There was an advertised/promotional price	15%

Top 8 Impulse Purchase Decision Influencers	Eastern Buyers
1 They looked fresh	41%
2 I thought they would be good to have on hand	32%
3 I had a craving for them	31%
4 I passed them in the aisle, and they caught my eye	30%
5 They're quick/easy to prepare	25%
6 I hadn't had one in a while	21%
7 I knew I didn't have any left	19%
8 There was a sale on produce items	16%



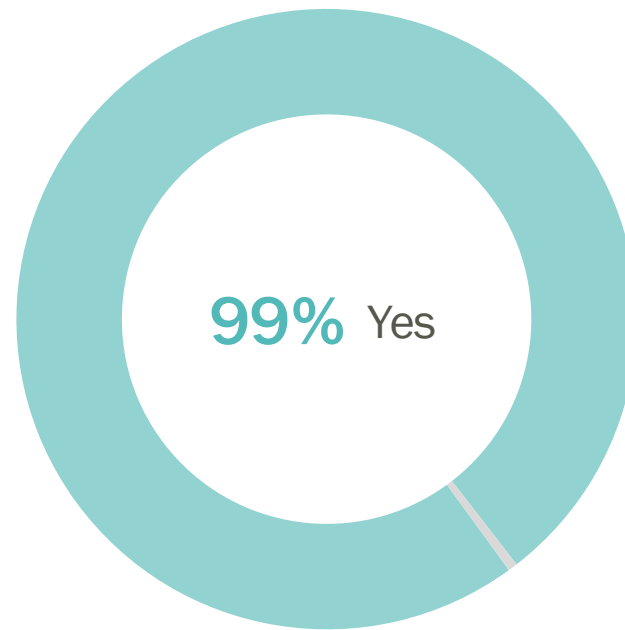
At the Store

Of Western and Eastern buyers who made impulse purchases in Q14
 Q14. Did you plan to purchase the avocados before going to the store?
 Q18. Which, if any, of the following played a role in your decision to purchase fresh avocados when you were at the store?

Shoppers reported knowing exactly where to look for avocados and typically found them as expected

Were avocados where you expected them to be?

Total Buyers



At the Store

Seven out of ten shoppers saw bagged avocados in various locations throughout their produce departments on their last shopping trip

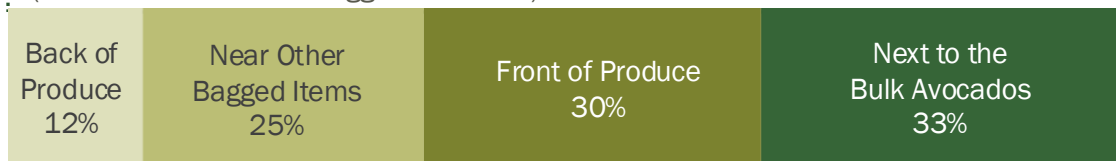
Did shoppers see the bagged avocados?

Total Buyers



Where did shoppers find avocados?

(Of those who saw the bagged avocados)



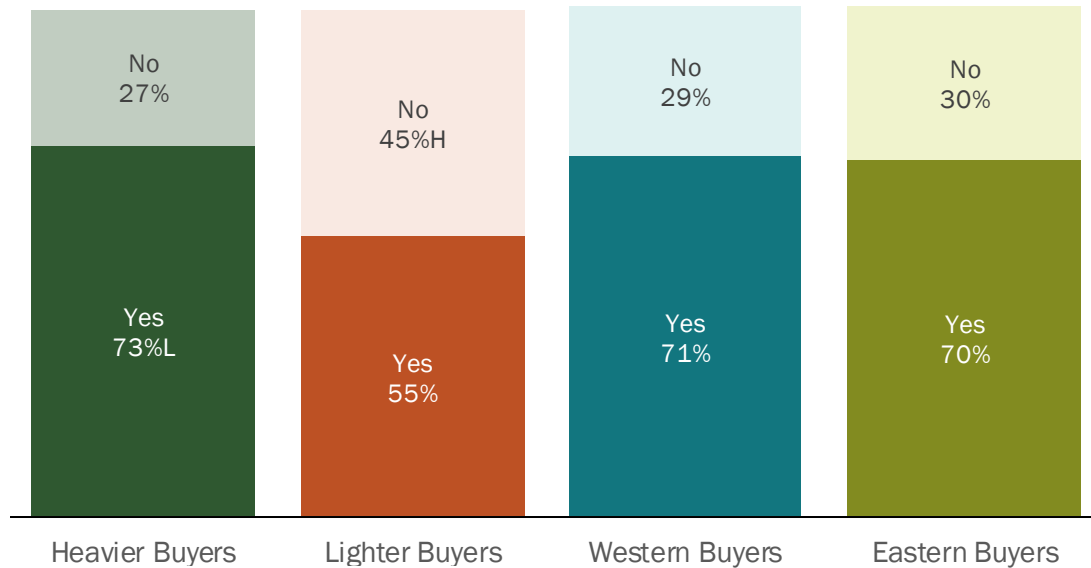
Bagged avocados do not have consistent placement within produce departments



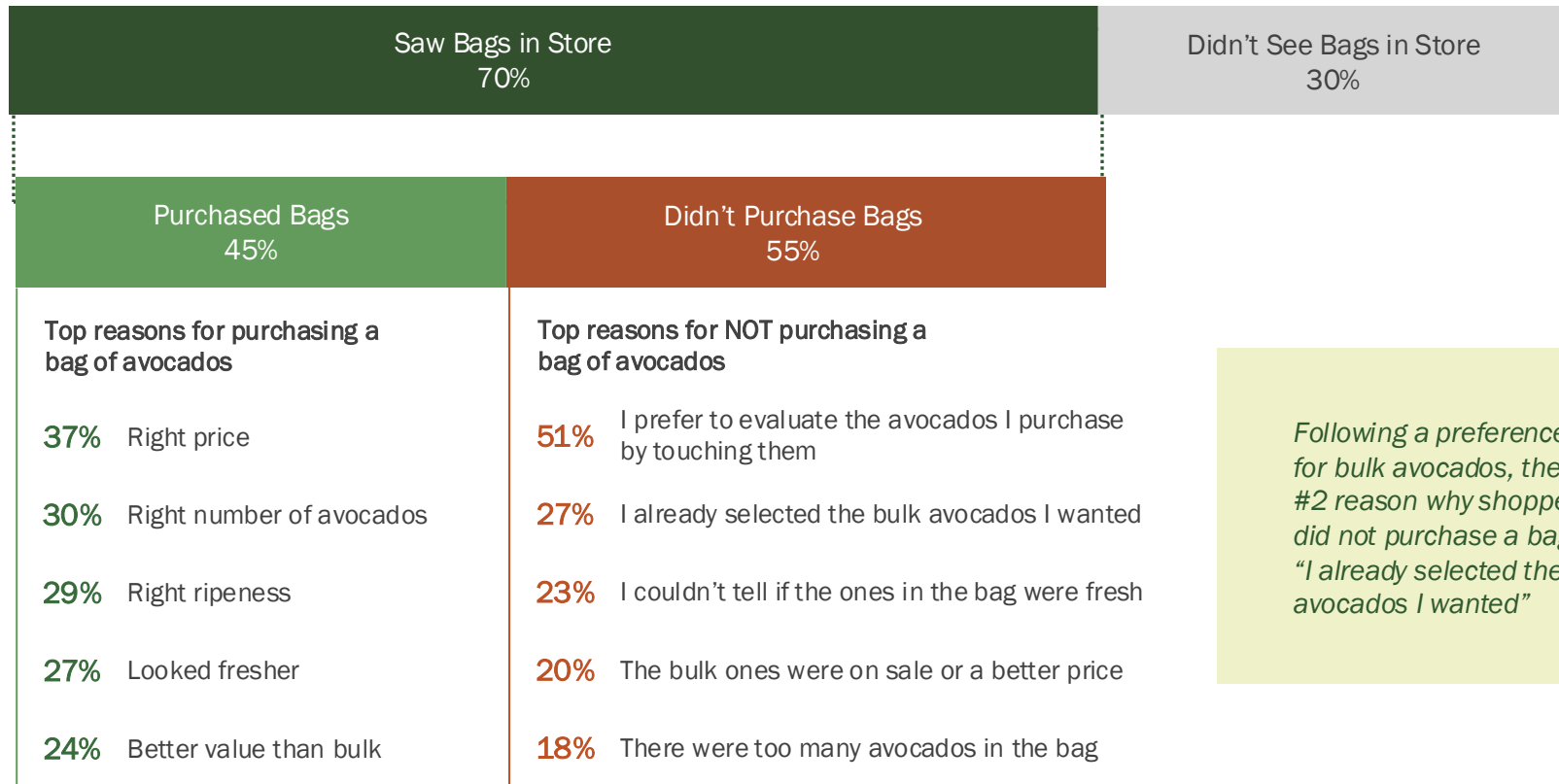
At the Store

Heavier buyers are more likely to spot bagged avocados than Lighter buyers

Did shoppers see the bagged avocados?
by Buyer Segment



Less than half of those shoppers who saw bagged avocados bought a bag on their last trip



Of those who saw bagged avocados in Q22
Q22. Did you see bagged avocados while in the store?
Q24. Did you purchase the bagged avocados?

Q25. Why did you choose to purchase a bag of avocados?

Q26. Why did you choose to buy the bulk avocados rather than the bagged avocados?

At the Store

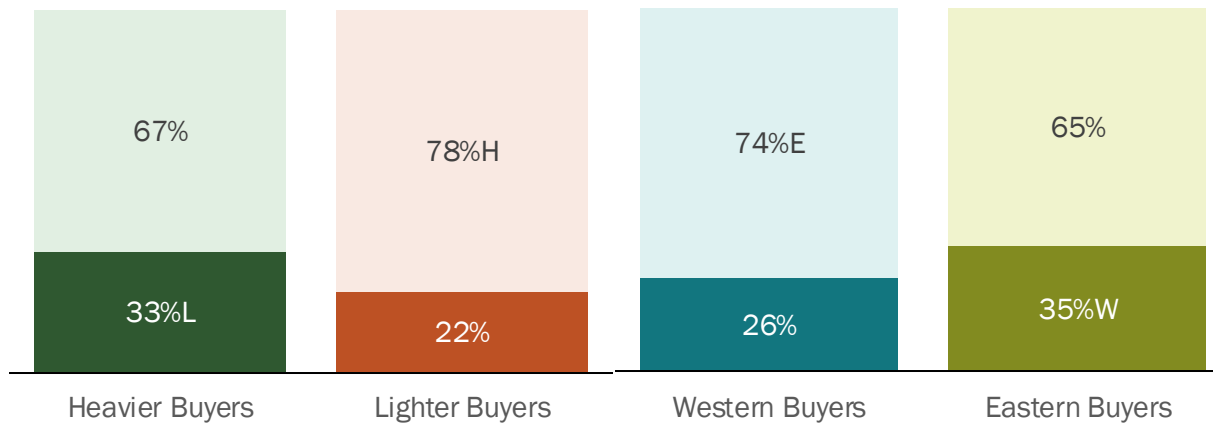
Heavier and Lighter buyers are more likely to purchase bagged avocados today than in 2015

Who purchased bagged avocados on their last shopping trip?

by Buyer Segment

■ Purchased Bags

■ Didn't Purchase Bags

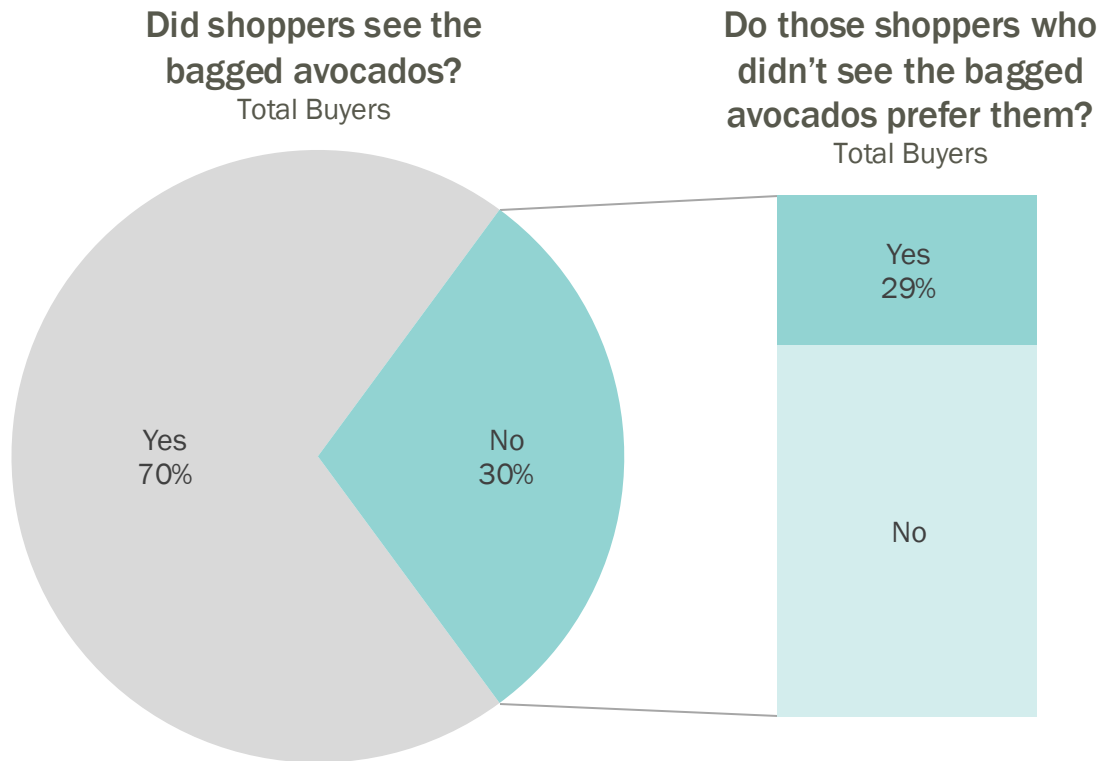


Change vs. 2015	Heavier Buyers	Lighter Buyers
Purchased Bags	+15 pts.	+17 pts.
Didn't Purchase Bags	-15 pts.	-17 pts.



At the Store

Nearly one out of ten avocado shoppers prefer bags, but did not see them in-store on their last trip



Nearly 30% of shoppers who didn't see bags in the store prefer to buy bagged avocados



At the Store

The in-store experience often falls short of expectations for avocado shoppers

Statements about shopper importance vs. actual experience

Example: 93% of avocado shoppers consider fresh appearance important, but only 59% said they found fresh avocados on their last trip

	Total Buyers	
	Rated Importance	Actual Experience
The avocados in the display look fresh	93%	59%
The avocados are available in bulk	87%	61%
There is a large/abundant selection of avocados	85%	39%
Avocados are easy to find within the produce section	82%	63%
The avocados are in a well-organized display	74%	50%
It is well-marked with signage	67%	40%
The avocados are next to other produce that I'd use with avocados	49%	29%
The avocados are available in bags	41%	32%

Large/abundant selection was rated 3rd in importance and 6th in actual experience



At the Store

Base Total Avocado Purchasers

Q47. How important are each of the following when shopping for fresh avocados in the store?

Q27. Which of the following statements were true when thinking about the section where you found the fresh avocados in the store?

Abundant selection had the widest gap (47 pts.) between importance and in-store experience for Heavier buyers

Statements about shopping for fresh avocados by Purchase Frequency	Heavier Buyers		Lighter Buyers	
	Rated Importance	Actual Experience	Rated Importance	Actual Experience
The avocados in the display look fresh	93%	59%	93%	60%
The avocados are available in bulk	87%	60%	87%	65%
There is a large/abundant selection of avocados	85%	39%	83%	40%
Avocados are easy to find within the produce section	84%L	64%h	74%	57%
The avocados are in a well-organized display	74%	49%	70%	51%
It is well-marked with signage	70%L	41%	52%	35%
The avocados are next to other produce that I'd use with avocados	50%L	30%	40%	25%
The avocados are available in bags	42%	33%H	35%	25%

While 9 out of 10 Lighter shoppers said that avocado placement near other produce that they'd use with avocados was important to them, only a quarter noted that as their actual in-store experience



At the Store

Base Total Avocado Purchasers

Q47. How important are each of the following when shopping for fresh avocados in the store?

Q27. Which of the following statements were true when thinking about the section where you found the fresh avocados in the store?

The gap between shopper importance and actual experience is wider among Eastern buyers

Statements about shopping for fresh avocados by Region	Western Buyers		Eastern Buyers	
	Rated Importance	Actual Experience	Rated Importance	Actual Experience
The avocados in the display look fresh	91%	62%	93%	57%
The avocados are available in bulk	86%	67%E	88%	57%
There is a large/abundant selection of avocados	84%	45%E	84%	36%
Avocados are easy to find within the produce section	80%	70%E	84%	59%
The avocados are in a well-organized display	69%	53%	76%W	48%
It is well-marked with signage	64%	42%	69%	39%
The avocados are next to other produce that I'd use with avocados	48%	31%	49%	28%
The avocados are available in bags	39%	34%	42%	31%



At the Store

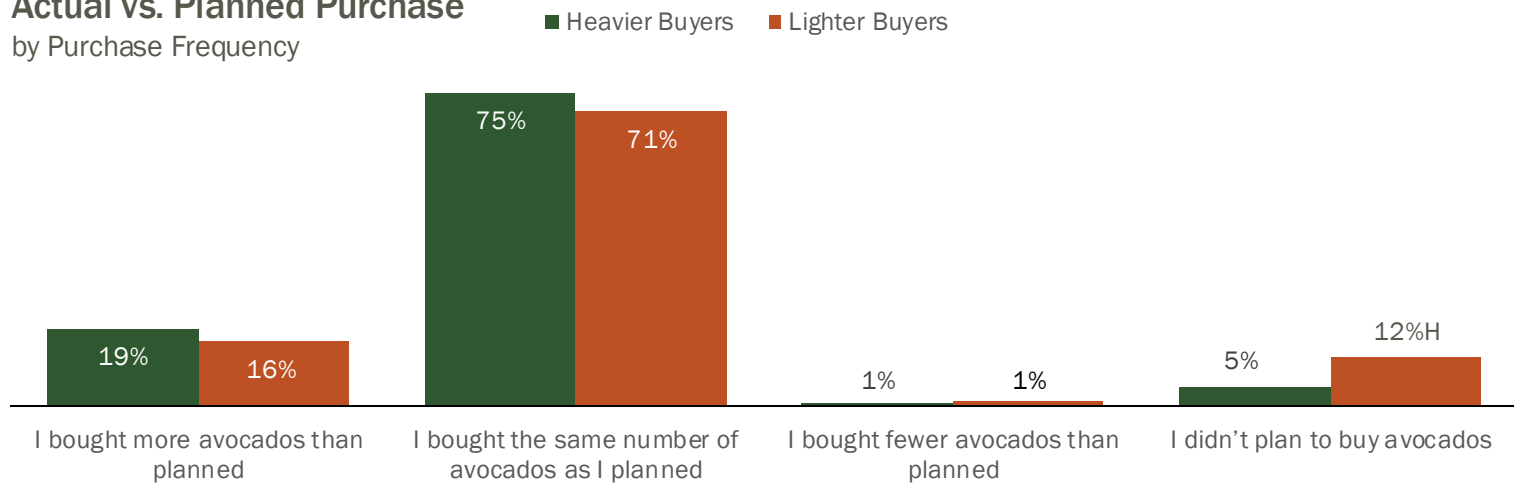
Base Total Avocado Purchasers

Q47. How important are each of the following when shopping for fresh avocados in the store?

Q27. Which of the following statements were true when thinking about the section where you found the fresh avocados in the store?

Heavier buyers shifted away from incremental avocado purchases toward planned purchases since 2015

Actual vs. Planned Purchase
by Purchase Frequency



Change vs. 2015

	Heavier Buyers	Lighter Buyers
I bought more avocados than planned	-6 pts.	+7 pts.
I bought the same number of avocados as I planned	+10 pts.	+5 pts.
I bought fewer avocados than planned	-2 pts.	-1 pt.
I didn't plan to buy avocados	-2 pts.	-11 pts.

Western buyers who bought avocados without planning to was +3 points higher than Eastern buyers



At the Store

Freshness, right price, and ripeness were top factors in the decision to buy more avocados than planned

Freshness overtakes right price since 2015 as the top reason for buying more than planned

Top 8 Reasons for Buying More Avocados Than Planned by Purchase Frequency	Heavier Buyers	Change vs. 2015	Lighter Buyers	Change vs. 2015
They looked fresh	52%	+22 pts.	52%	+7 pts.
They were the right price	51%	+1 pt.	29%	-8 pts.
They were perfectly ripe	35%	+13 pts.	29%	+3 pts.
They were on sale	33%	-8 pts.	14%	-24 pts.
The store had a big selection	26%	+20 pts.	24%	+2 pts.
I thought of other ways I could use them	20%	+9 pts.	24%	+5 pts.
They were sold in a bag	17%	+16 pts.	24%	+9 pts.
Store had other avocado varieties I wanted to try	12%	+10 pts.	5%	-8 pts.



At the Store

Fresh appearance also drew in shoppers who purchased avocados but didn't plan to buy them

Top Reasons for Impulse Purchases by Purchase Frequency	Heavier Buyers	Lighter Buyers
They looked fresh	64%	63%
They were the right price	42%	44%
They were on sale	27%	31%
I remembered I needed them	24%	13%

Freshness was the top reason for buying avocados on impulse



At the Store

After the Store

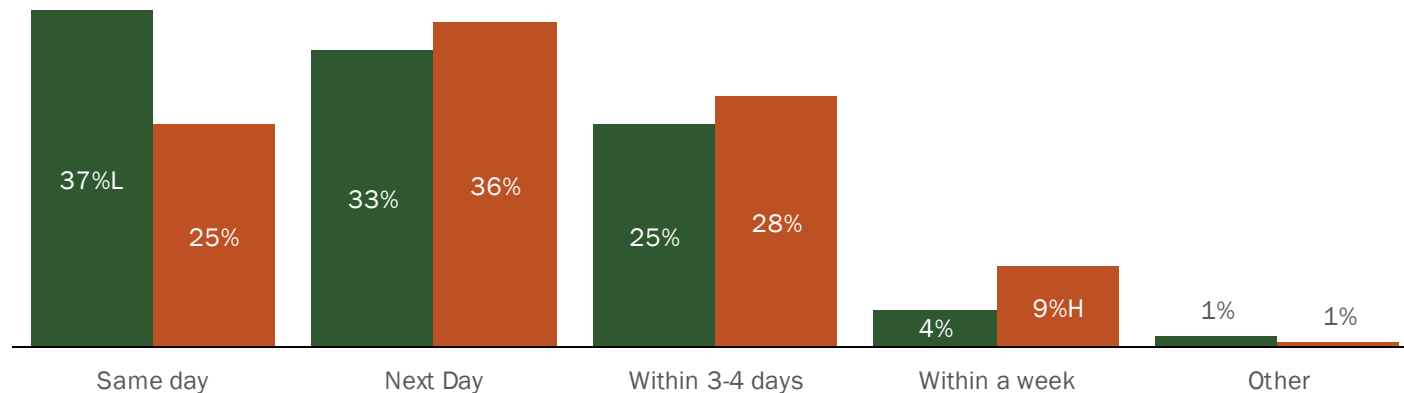
Detailed Findings

Heavier buyers are more likely than Lighter buyers to use avocados on the same day of their purchase

When did shoppers use or plan to use the avocados that were purchased?

by Purchase Frequency

■ Heavier Buyers ■ Lighter Buyers



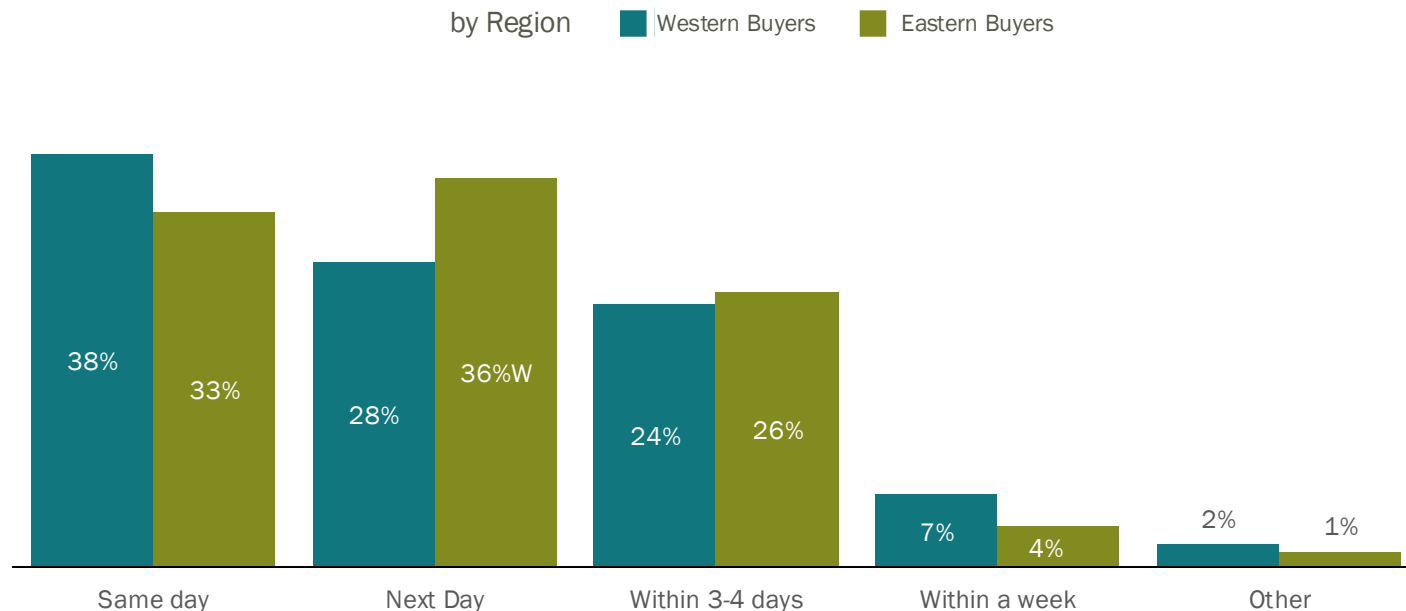
Heavier buyers are more likely to use avocados sooner after purchase, while Lighter buyers tend to extend their usage into later in the week

Same day usage was reported by 37% of Heavier buyers, compared to 25% of Lighter buyers. About 38% of Lighter buyers reported they used the avocados on the 3rd day or later after purchase, compared to 30% of Heavier buyers

After the Store

Western buyers opt to use their avocados same day, while Eastern buyers wait longer to use them

When did shoppers use or plan to use the avocados that were purchased?



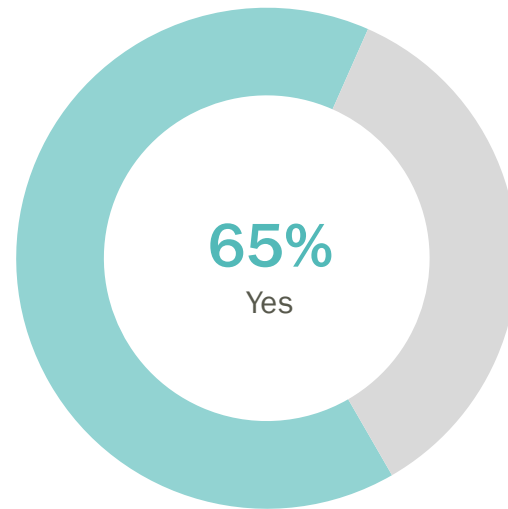
After the Store

More than two-thirds of satisfied buyers acted upon or shared their satisfying avocado purchase

Were shoppers satisfied with the avocados that were purchased?
Total Buyers



Did shoppers act upon or share their satisfying avocado purchase?
(of those who were satisfied with their purchase)



Base Total Avocado Purchasers; Of those who were satisfied with their purchase in Q41

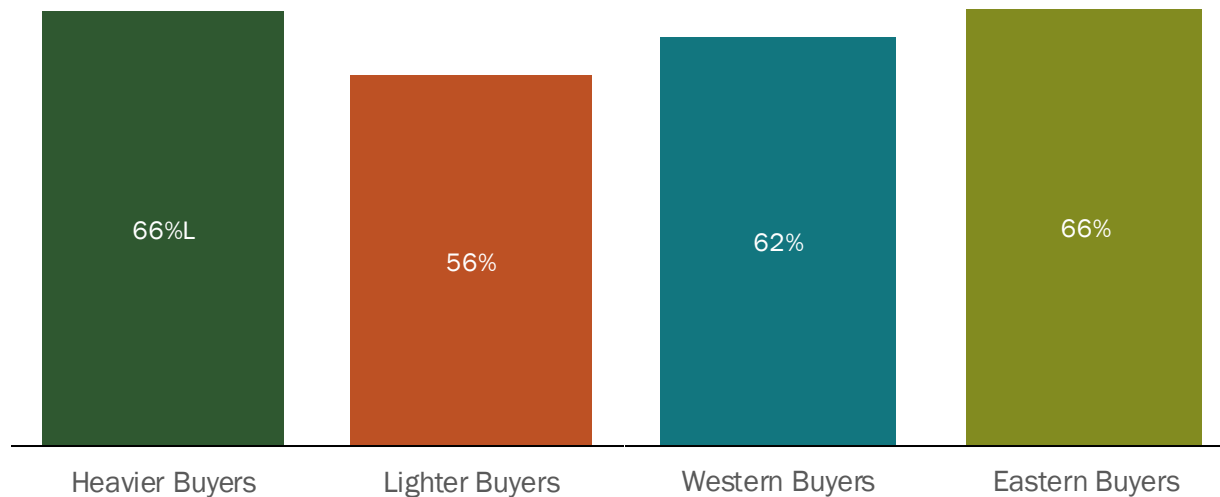
Q41. Were you satisfied with the avocados once you brought them home?

Q42. You mentioned you were satisfied with the avocados you purchased. After that purchase did you do any of the following?

After the Store

Heavier and Eastern buyers are more likely to act upon or share their satisfying avocado purchase

Who acted upon or shared their satisfying avocado purchase?
by Buyer Segment



After the Store

Of those satisfied shoppers who acted following their purchase in Q42
Q41. Were you satisfied with the avocados once you brought them home?
Q42. You mentioned you were satisfied with the avocados you purchased. After that purchase did you do any of the following?

Satisfied avocado buyers said they'll make repeat purchases and have confidence in future selections

What did satisfied avocado buyers do after their purchase? by Purchase Frequency	Heavier Buyers	Lighter Buyers
Put avocados on the grocery list for my next trip	45%	38%
Felt more confident selecting avocados in the future	41%	42%
Recommended avocados to my friends and family	32%	26%
Looked for new ways to use avocados	31%	33%
Looked for sales or promotions on avocados	21%	25%
Looked for nutritional information on avocados	17%	12%
Shared photos of my avocado dishes or recipes on social media	14%	8%
Shared my experience with avocados on social media	13%	7%
Left a positive review for the store where I bought the avocados	13%	7%
Returned to buy avocados sooner than usual	11%	8%



After the Store

Of those satisfied shoppers who acted following their purchase in Q42

Q41. Were you satisfied with the avocados once you brought them home?

Q42. You mentioned you were satisfied with the avocados you purchased. After that purchase did you do any of the following?

Satisfying avocado purchases also drove Eastern and Western buyers to confidently purchase again

What did satisfied avocado buyers do after their purchase? by Region	Western Buyers	Eastern Buyers
Put avocados on the grocery list for my next trip	44%	45%
Felt more confident selecting avocados in the future	41%	41%
Recommended avocados to my friends and family	30%	32%
Looked for new ways to use avocados	29%	32%
Looked for sales or promotions on avocados	21%	22%
Looked for nutritional information on avocados	15%	17%
Shared photos of my avocado dishes or recipes on social media	13%	14%
Returned to the store to buy avocados sooner than usual	12%	9%
Shared my experience with avocados on social media	12%	12%
Left a positive review for the store where I bought the avocados	10%	13%



After the Store

Of those satisfied shoppers who acted following their purchase in Q42

Q41. Were you satisfied with the avocados once you brought them home?

Q42. You mentioned you were satisfied with the avocados you purchased. After that purchase did you do any of the following?

HASS AVOCADO
BOARD



Thank You!

For additional retail information and insights,
please visit the Hass Avocado Board website:

HassAvocadoBoard.com



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Clear Direction For Your BusinessSM