



# Avocado Tracking Study

## 2015 User Segmentation Analysis

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# Background

- This is one of three reports for the general market tracking study. The objective of this report is to monitor changes among users overall, as well as four distinct avocado user groups (Light, Medium, Heavy and Super) on a number of specific measures such as the following:
  - Avocado usage
  - Drivers and barriers to usage
  - Nutrition and wellness importance and association
  - Food safety
  - Advertising and PR efforts awareness
  - Demographics
- Separate reports will be issued for the following:
  - Trended report of target segment users
  - Regional report cards

## Background (Contd.)

- User groups defined according to annual household volume consumption as follows:\*
  - Light: Purchase at least one but less than 12 avocados per year
  - Medium: Purchase 12 – 36 avocados per year
  - Heavy: Purchase 37 – 120 avocados per year
  - Super: Purchase more than 120 avocados per year
- 2007 was the first year the sample size was large enough to separate Heavy users into Heavy and Super, which allows for more detailed analysis.
- The segmentation has been completed at the total U.S. level among avocado users age 25+.

*\*Calculation based on frequency of buying multiplied by average number bought per occasion.*

## Background (Contd.)

- **When**

- This wave of the study was completed from April 14 to April 24, 2015.
- Spring waves have generally been completed in February/March and Fall waves have been completed in late summer or early Fall.

- **Who**

- 2,409 grocery shoppers age 25+
- Note: 2007/2008 was restricted to age 25-54

- **How**

- Self-administered web based survey

# Summary

## Avocado Usage

- Consistent with recent waves, two-thirds of U.S. consumers have purchased avocados for home use in the past year. The proportion of Heavy/Super users has gradually increased over time, and is currently 59% of all avocado users – one of the highest levels ever recorded.
  - While Heavy/Super users represent 59% of all avocado users, they account for 91% of the avocado volume (similar to the 92% seen last year).
  - 57% of Super users buy avocados every week – a level similar to last year.

## Drivers and Barriers to Avocado Consumption

- The combination of taste, variety of uses, avocados being good for you, nutritional benefits, and quality are key drivers of avocado consumption.
  - Being able to substitute avocados for other foods is also a strong purchase driver for Super users.
  - The availability of organic fruit falls into a lower tier of drivers for all user groups. However, this has been climbing in importance for Heavy and Super users.
- A large portion of consumers have not bought avocados because of the price, with \$1.81 being the trigger point. However, price is generally not a barrier to purchase (only impacting 15% of consumers).
- Fat content and lack of availability are not strong barriers to purchase. Perishability is a barrier for one-quarter of consumers.
  - Fat content, which had been trending down among Light users, has increased as a barrier among this group over the past 2 years.

# Summary

## Nutrition and Wellness

- Avocados deliver on 9 of the 12 nutritional attributes of importance to users.
  - They deliver best on (in descending order) contains good fat, have nearly 20 essential nutrients, contain antioxidants, nutrient dense, contains fiber, cholesterol free, contain vitamins E and C, less than 1 gram of sugar, and sodium free. This order has shifted somewhat. They also continue to delivery on contains potassium, but this attribute has dropped in importance.
  - Avocados fall short on perceptions of being low in fat, low in calories and contains iron.
  - Avocados association with having nearly 20 essential nutrients, contains antioxidants, contains iron, contains folate, and low in calories has decreased this year. Decreases for various nutritional benefits were seen across all user groups. However, contains fiber, nutrient-dense and contains natural plant sterols increased this year among Light users.
  - In general, the more avocados you consume, the more you agree with the various nutritional attributes of avocados.
- Avocados deliver on 6 of the 17 health and wellness attributes of high importance to users.
  - They deliver best on (in descending order) heart health, nutrient boosting, healthy aging, lower/healthy cholesterol levels, satiety/fullness/hunger control and healthy skin.
  - Avocados association with 14 of the 20 health and wellness benefits measured saw notable increases. This was driven by increases across all user groups.
  - Again, the more avocados you consume, the more you agree with the various nutritional benefits of avocados.

# Summary

## Healthfulness and Food Safety

- Avocados perform well in comparison to other fruits, vegetables and healthy fat foods as far as being considered healthy.
  - As seen last year, avocados perform well, just not as well against blueberries, broccoli and spinach.
  - Avocados perform better than average against olives and peanut/almond butter.
- As seen last year, users are reasonably confident in food safety, and their confidence is similar for food in general, fresh fruits and vegetables and avocados.
- Similar to last year, one-fifth of users regularly check to see if a food is GMO free. Lack of familiarity with GMO has decreased from 19% to 12%.
  - There is some, but not overwhelming concern about foods with GMO.
- Two-thirds of users are food and wellness involved – a similar level to previous years.
  - 85% of Super users are food and wellness involved.



# Summary

## Advertising and PR Impact

- About one-third of users are aware of any advertising for avocados – a level similar to recent waves. One-half of Super users are aware of advertising for avocados.
- The heavier an avocado user, the more likely you are to have also heard about avocados from a non-advertising source, with in-store, word-of-mouth and television programs being the top mentions.
- Awareness of the “Love One Today” logo continues to be up from the initial pre-campaign ghost level awareness of (12% vs. 8%). However, there has been a modest decline since last year, driven by Heavy and Super users (which both had seen significant increases last year).
- There has been a general decline in seeing or hearing news articles about the health benefits of avocados. These declines are evident across all user groups.

## Demographics

- There are many demographic differences across the user groups. In fact, the only demographic without much variation is gender.
- As avocado consumption increases, users are more likely to:
  - Be younger
  - Be married/partnered
  - Have a higher household income
  - Be in a larger household size and have children
  - Be better educated (though not as strong of a difference as last year) and employed full-time
  - Be of Hispanic origin

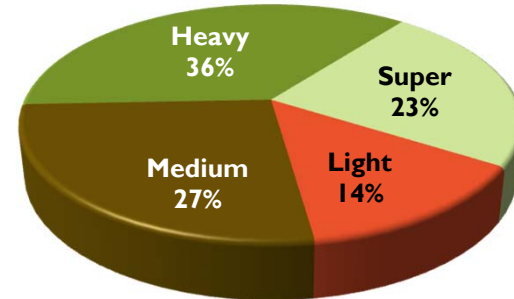
# Avocado Usage

# User Groups

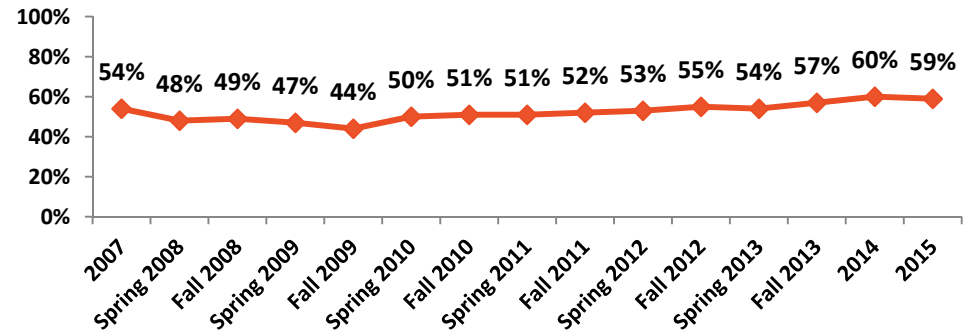
## 2015

- The proportion of Heavy and Super avocado users in the U.S. has gradually increased over time. It is currently at 59% - one of the highest levels ever recorded.

**Total U.S.**



**Heavy/Super Total U.S.**

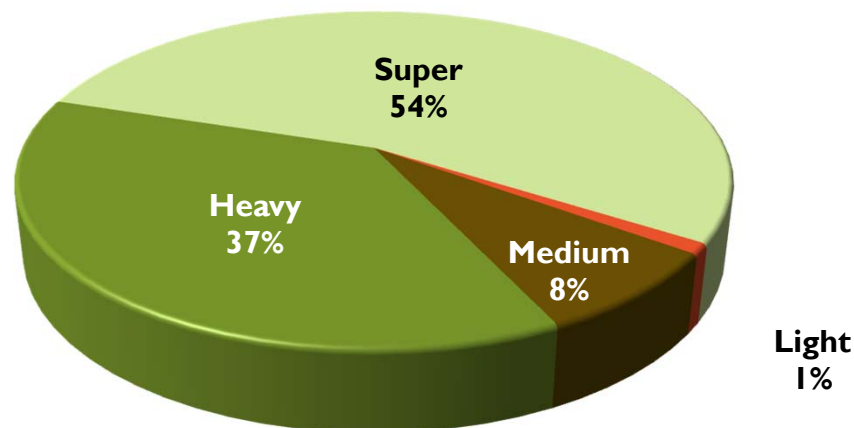


Q425, Q430 - On average, how many avocados do you usually buy at one time? Over the course of a year, how often do you buy avocados to eat or serve at home?

# User Group Share of Volume

2015

- While Heavy and Super users represent 59% of avocado users, they account for 91% of the avocado volume. Super users account for over one-half of the volume.
  - The concentration of avocado volume among these two segments has remained fairly consistent over time.

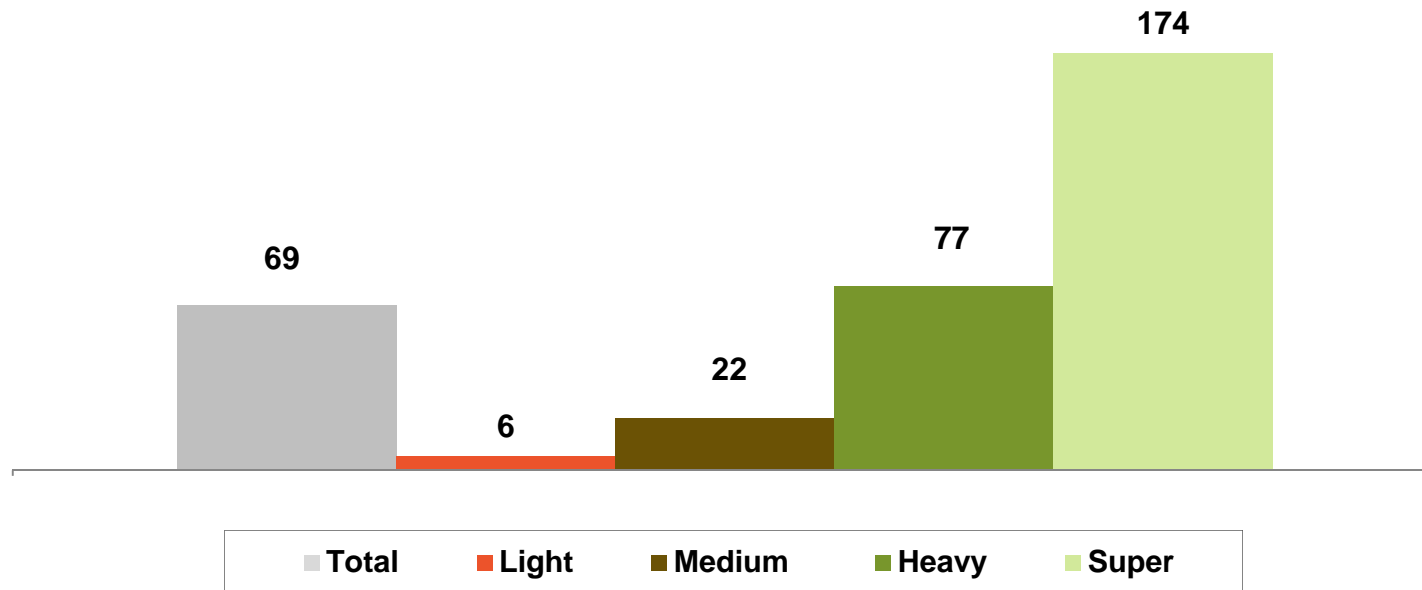


Q425, Q430 - On average, how many avocados do you usually buy at one time? Over the course of a year, how often do you buy avocados to eat or serve at home?

## Average Number of Avocados Purchased in Past Year

2015

- Driven by our definition, Heavy and Super users are buying many more avocados per year than the other groups. Super users buy more than twice as many avocados per year as Heavy users.

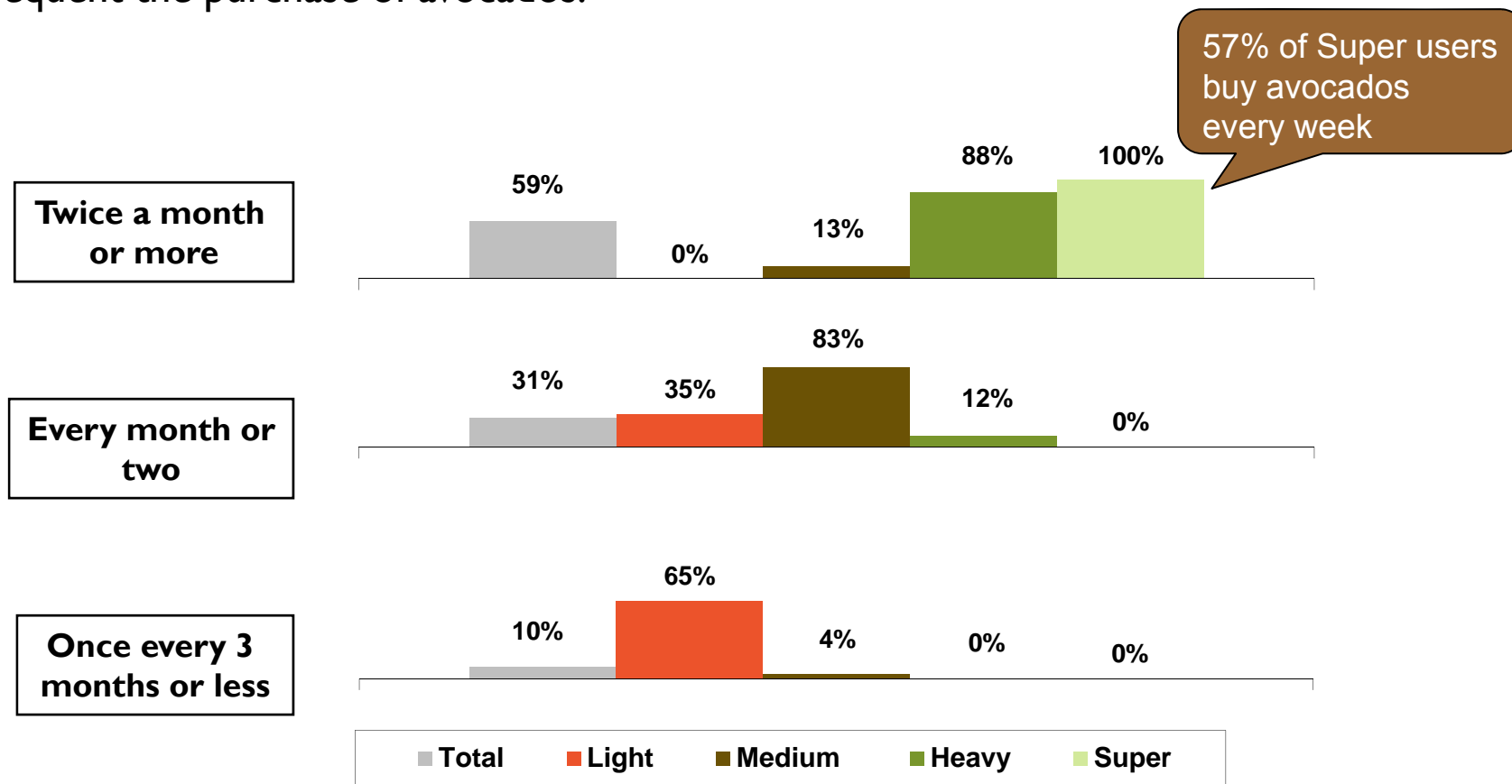


Q425, Q430 - On average, how many avocados do you usually buy at one time? Over the course of a year, how often do you buy avocados to eat or serve at home?

# Frequency Of Buying Avocados To Eat Or Serve At Home

2015

- Consistent with the way users were defined, the heavier the usage, the more frequent the purchase of avocados.



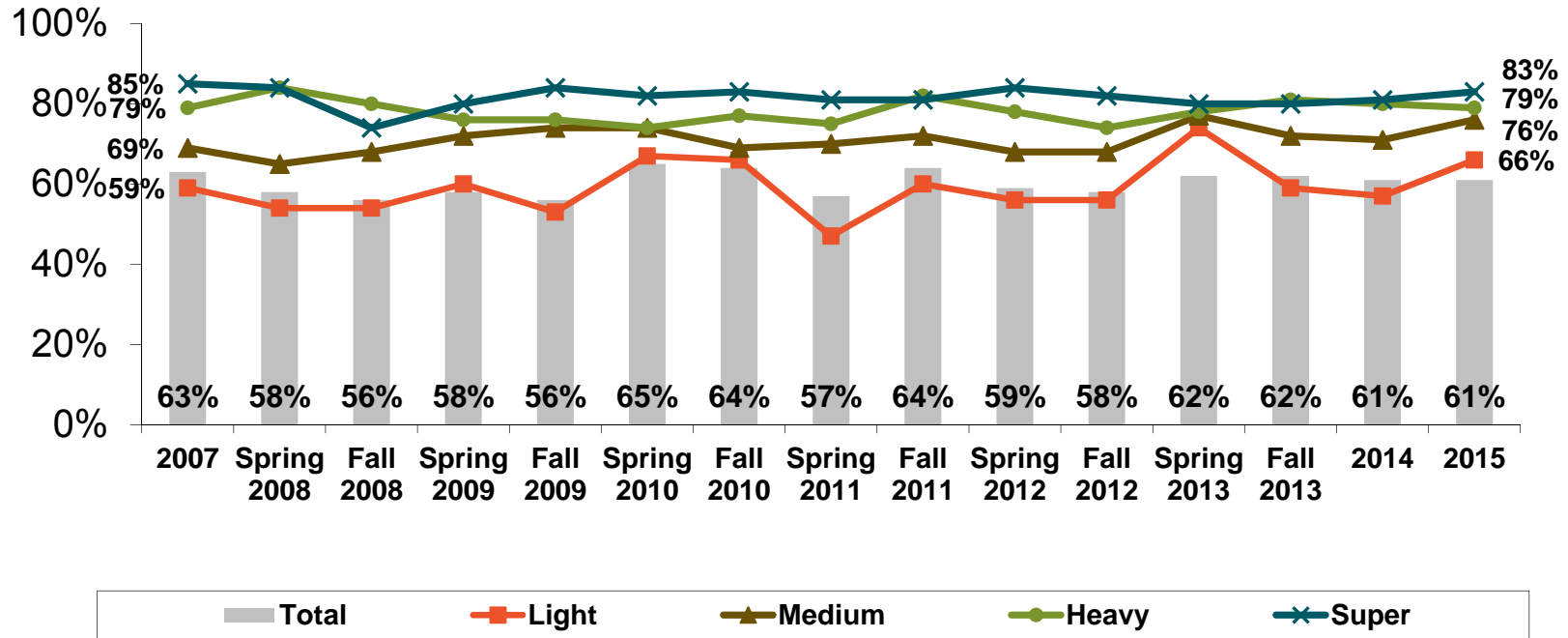
Base: Bought avocados to eat or serve at home



# Drivers and Barriers to Avocado Usage

## Variety of Uses as a Reason to Purchase Avocados

- There is a strong correlation with a variety of uses for avocados and the level of avocado consumption.

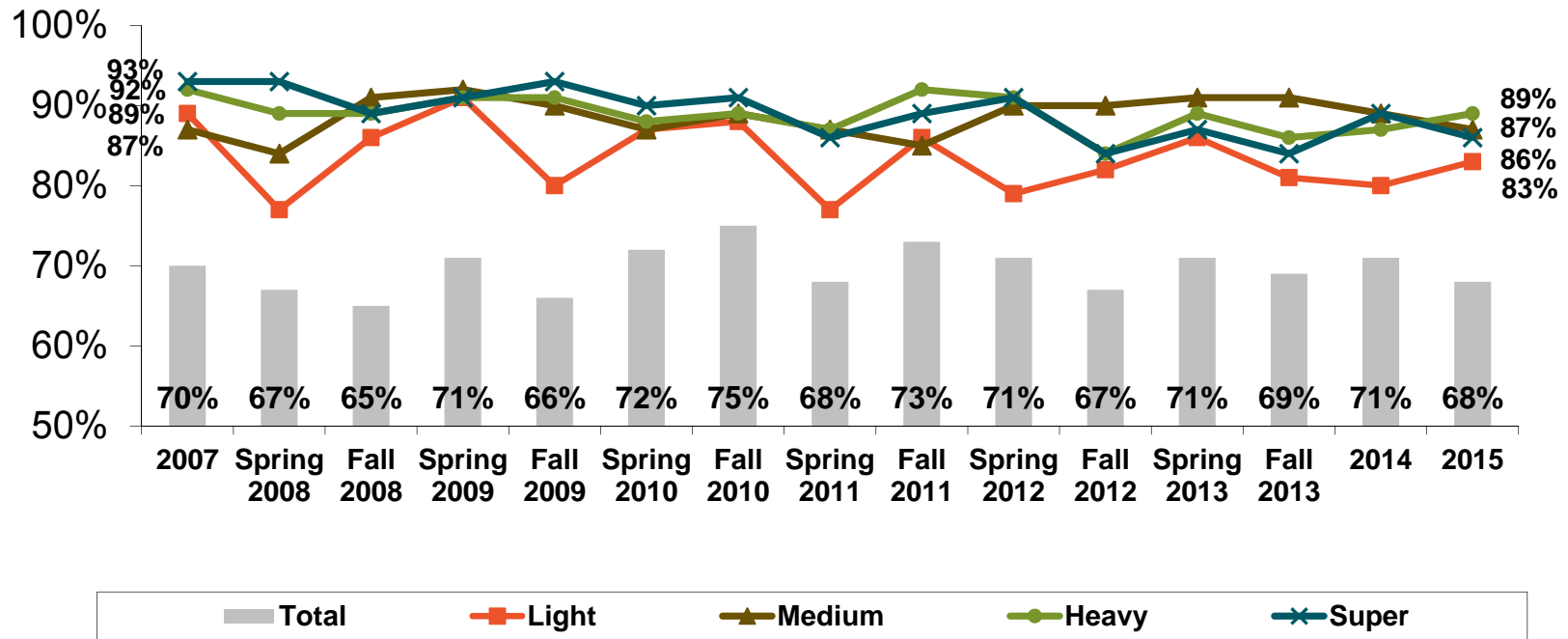


Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.



## Taste as a Reason to Purchase Avocados

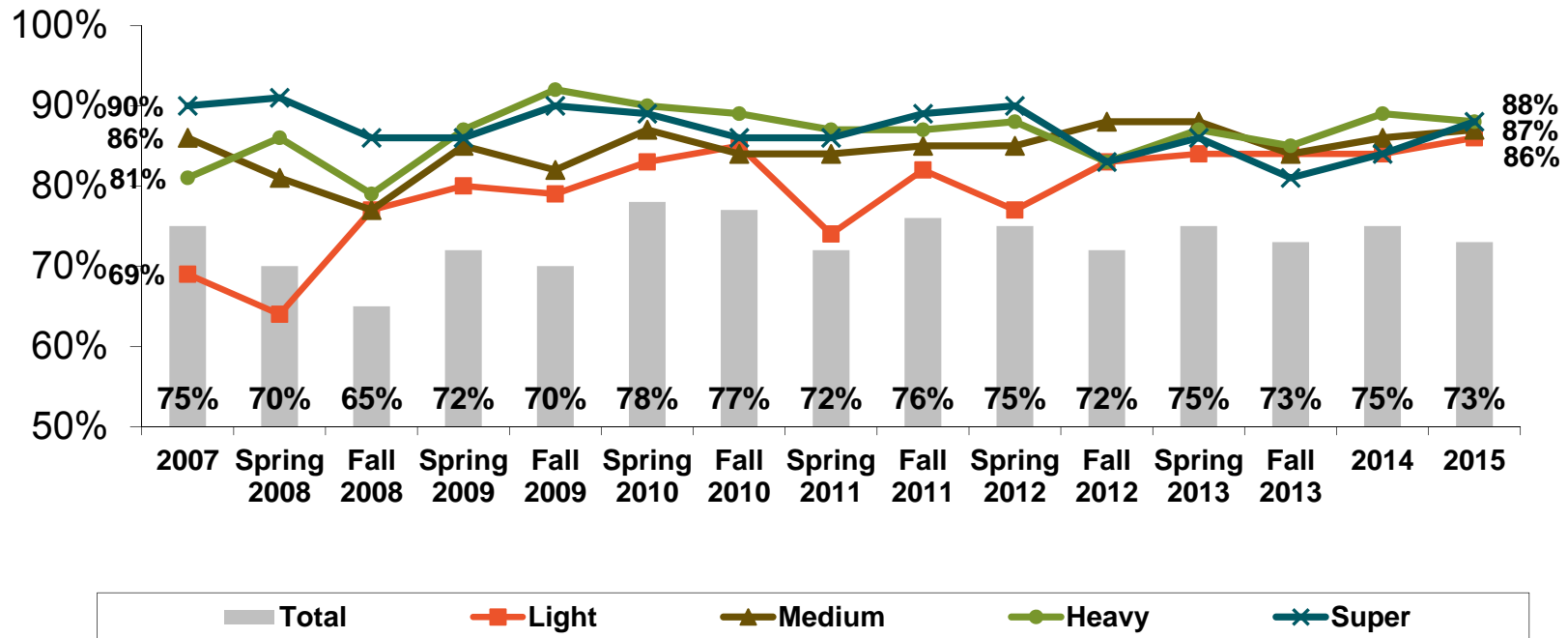
- Taste is a very strong driver for use of avocados among all user groups.



Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.

## Good For You as a Reason to Purchase Avocados

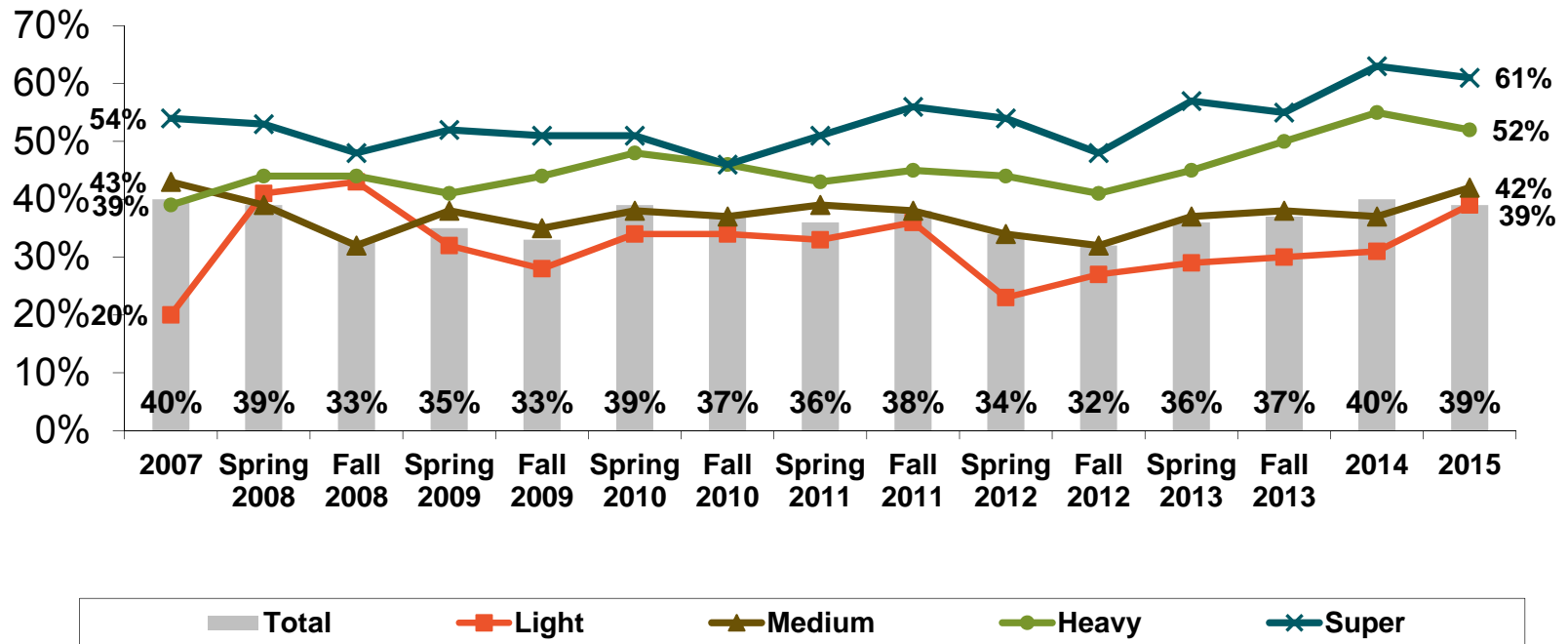
- Being good for you is also a very strong driver for the use of avocados among all groups.



Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.

## Being Organically Grown as a Reason to Purchase Avocados

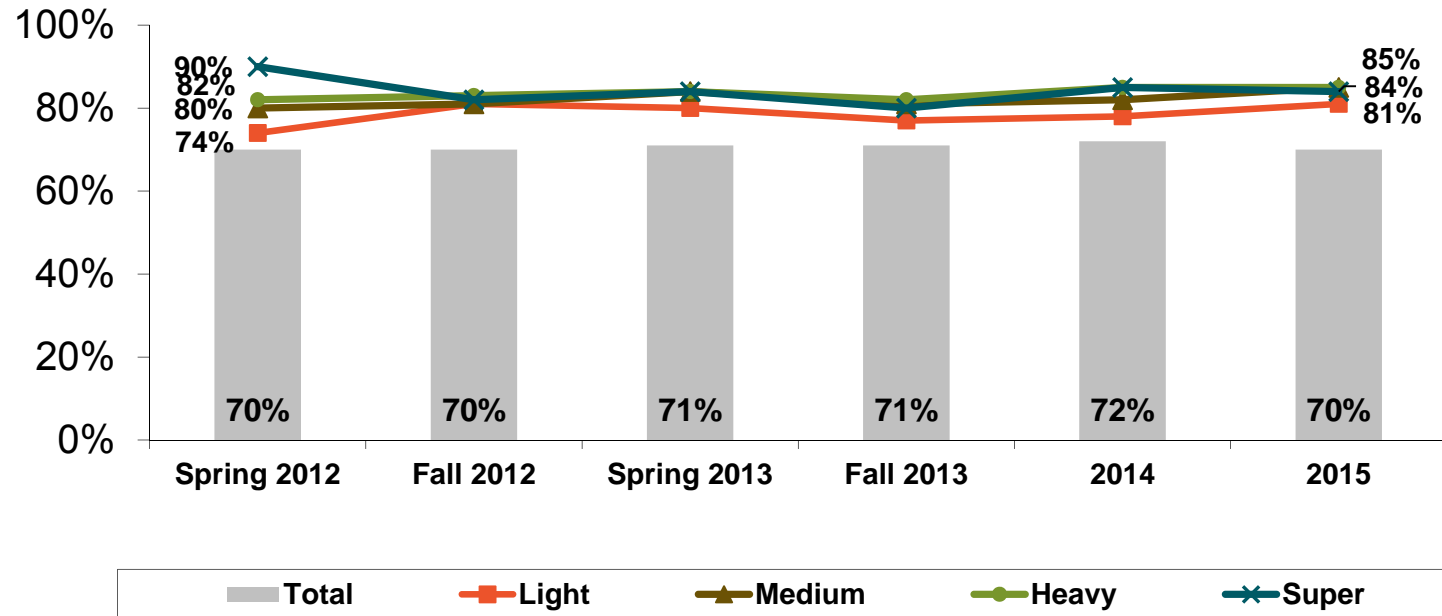
- Being organically grown is a reason for purchase for two-fifths of users – a much lower proportion than seen for many other reasons. This does skew higher as avocado consumption increases.



Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.

## Nutritional Benefits as a Reason to Purchase Avocados

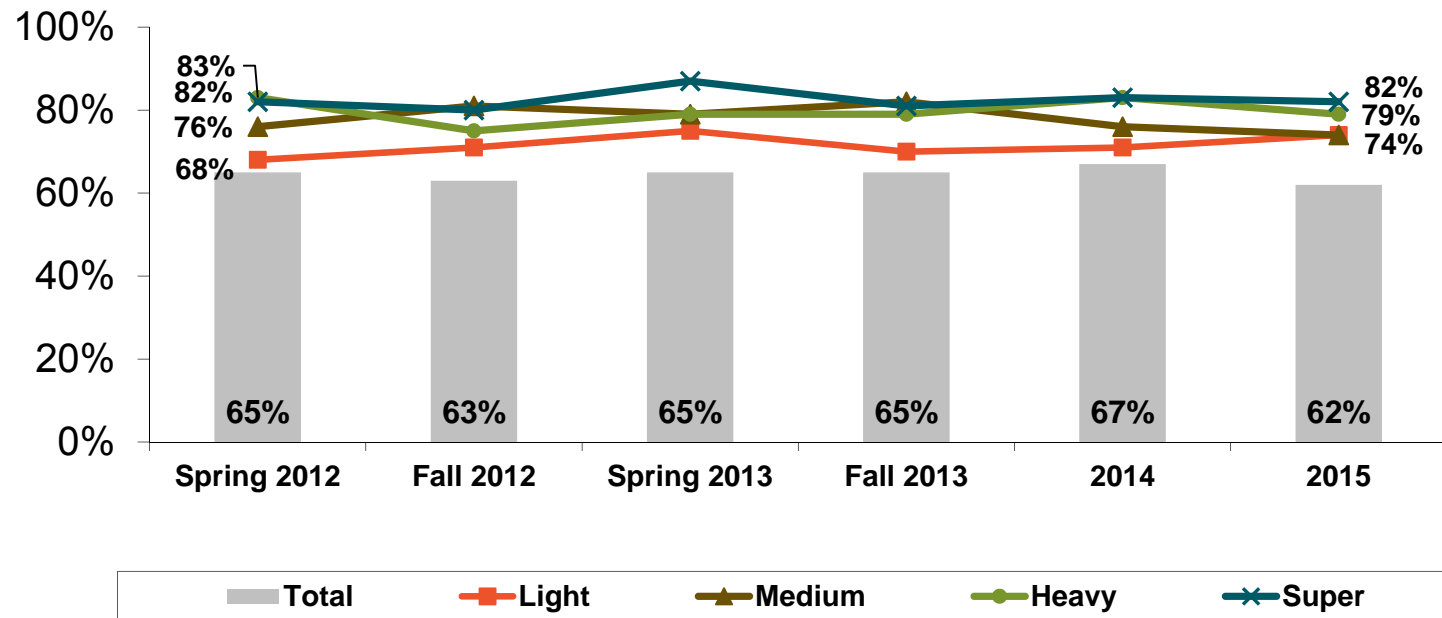
- Nutritional benefits are a strong driver for avocado purchase for all segments, in line with taste, quality, and being good for you.



Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.

## Quality as a Reason to Purchase Avocados

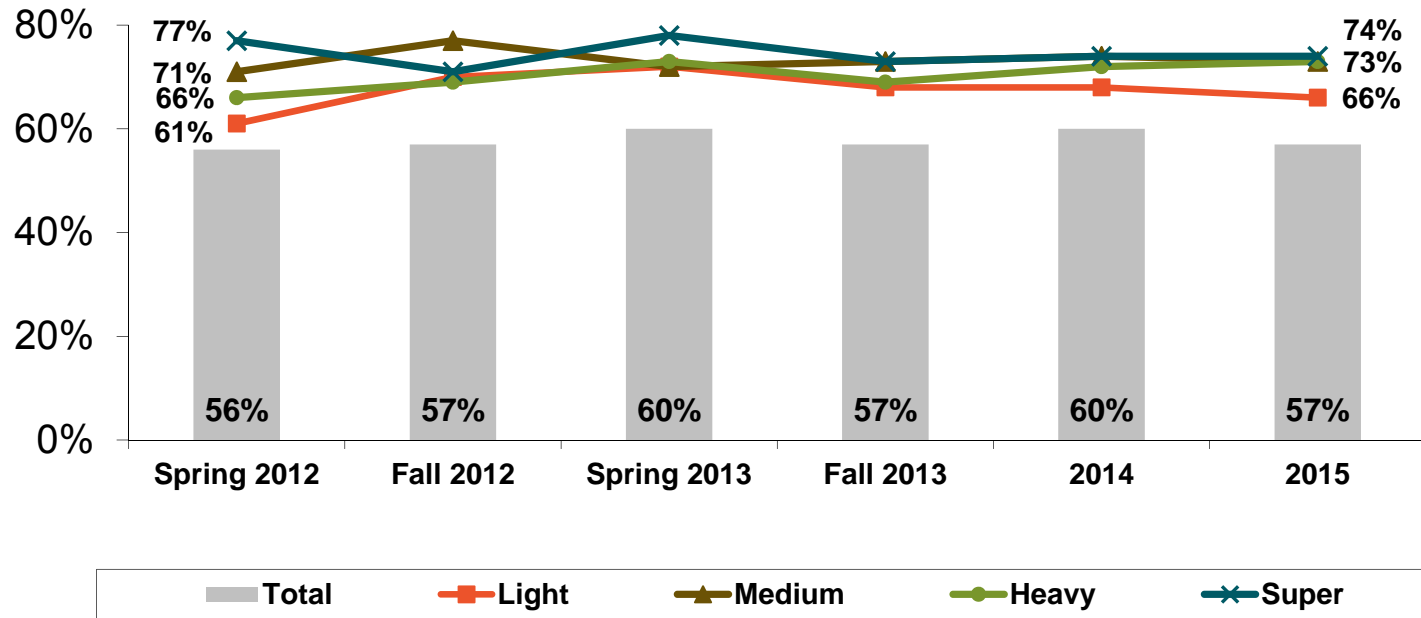
- Quality is also a strong driver for purchasing avocados. As avocado consumption increases, the more important it is.



Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.

# Ripeness as a Reason to Purchase Avocados

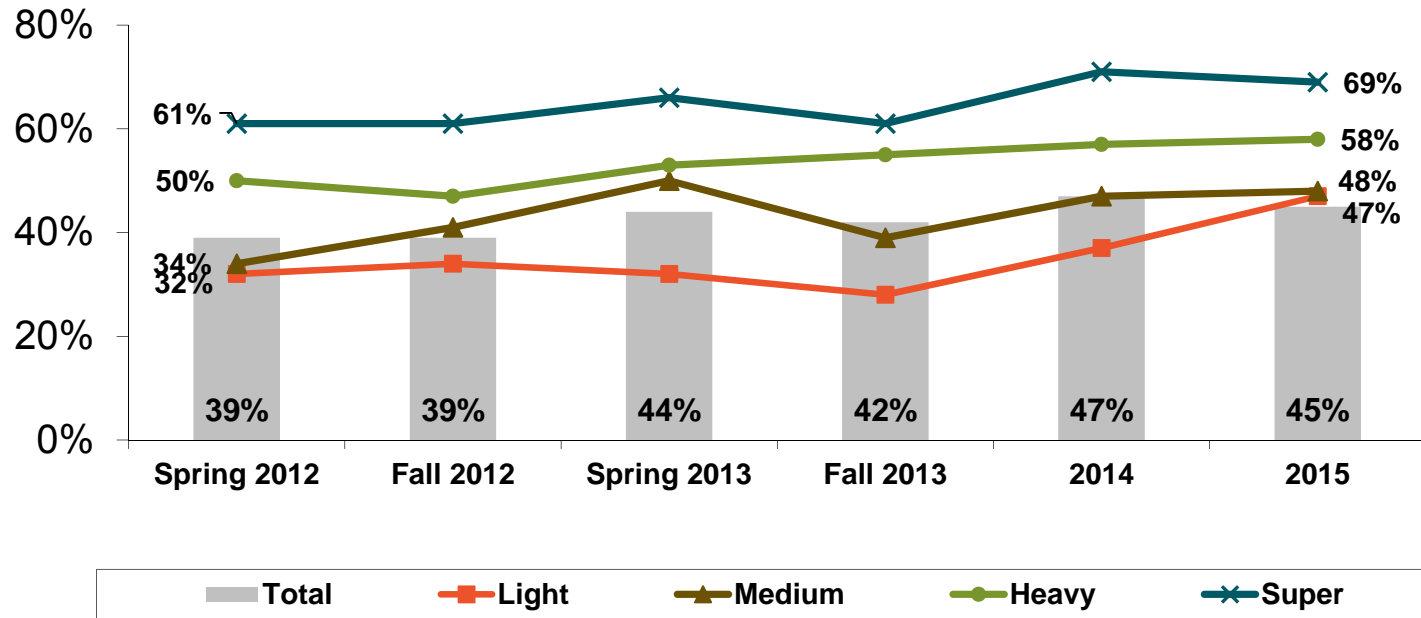
- Ripeness is a strong second tier driver of purchasing avocados.



Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.

## Can Be Substituted for Other Foods/Ingredients as a Reason to Purchase Avocados

- Substitution for other foods is a moderate purchase driver, but it is a very strong driver among Super users.

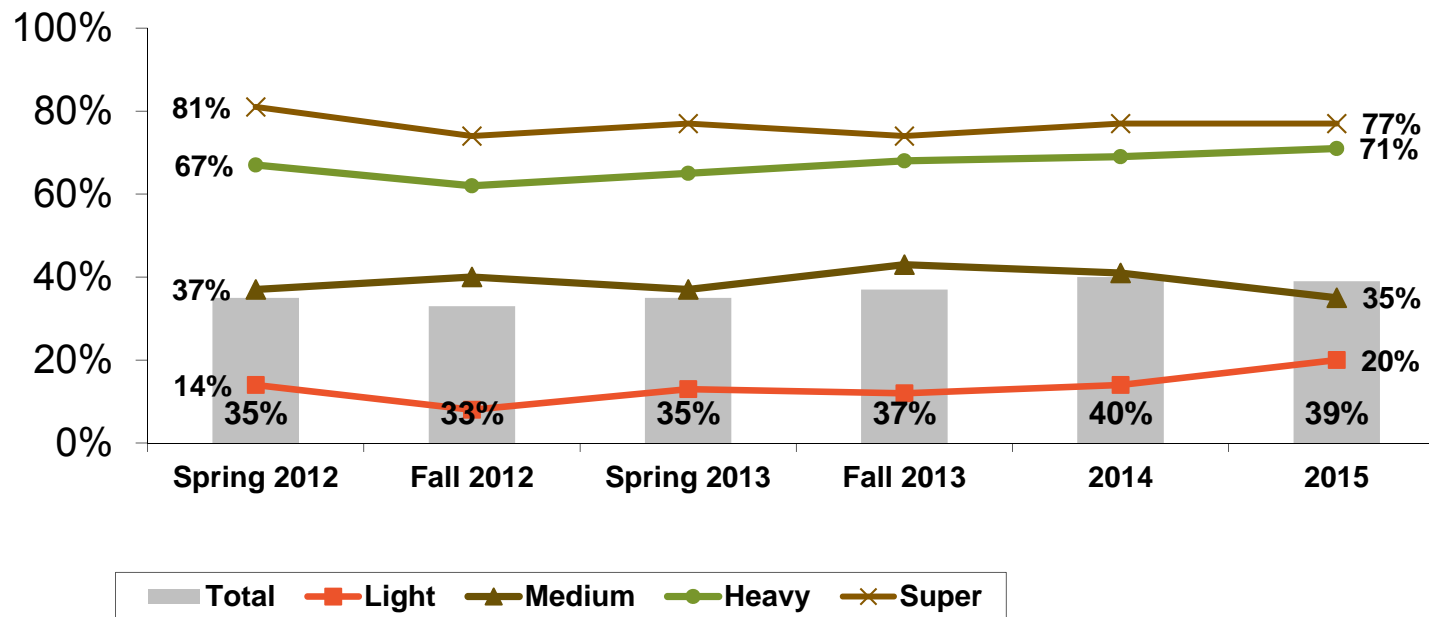


Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.



## They Are a Staple in My Household as a Reason to Purchase Avocados

- While avocados are a household staple for many Heavy and Super users, they are much less so for everyone else.



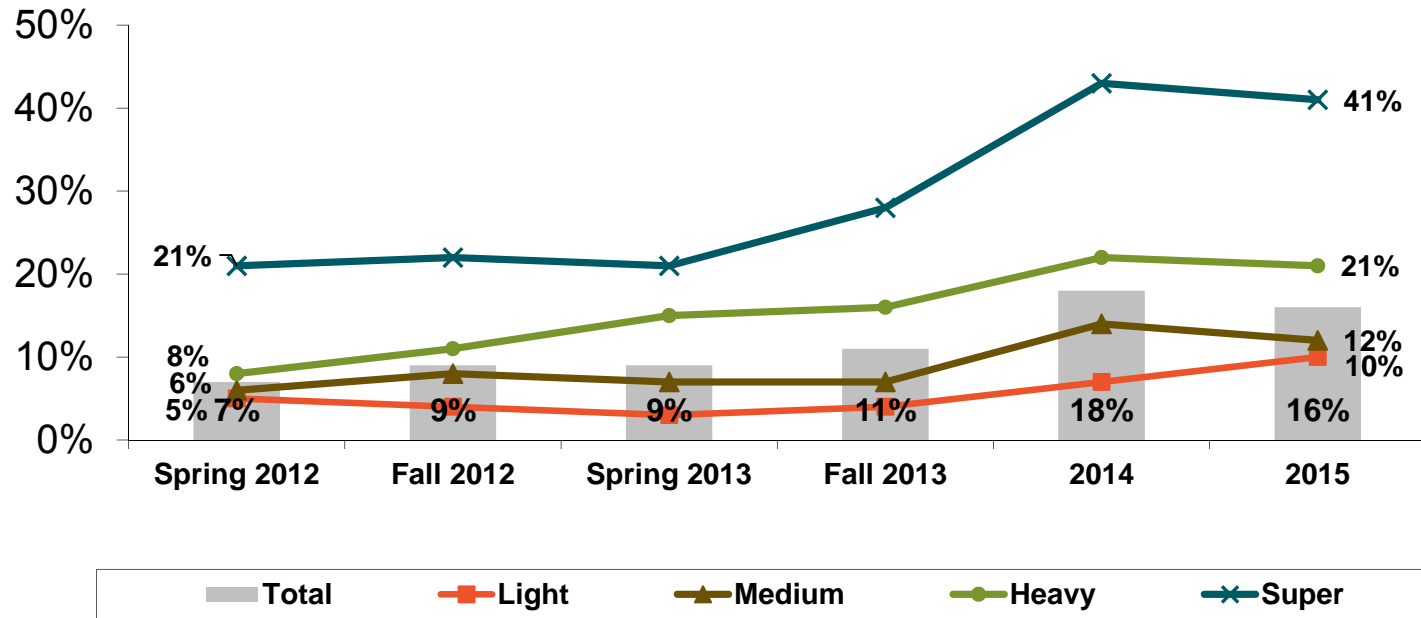
Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.





## I Buy Them for My Baby/Young Child to Eat as a Reason to Purchase Avocados

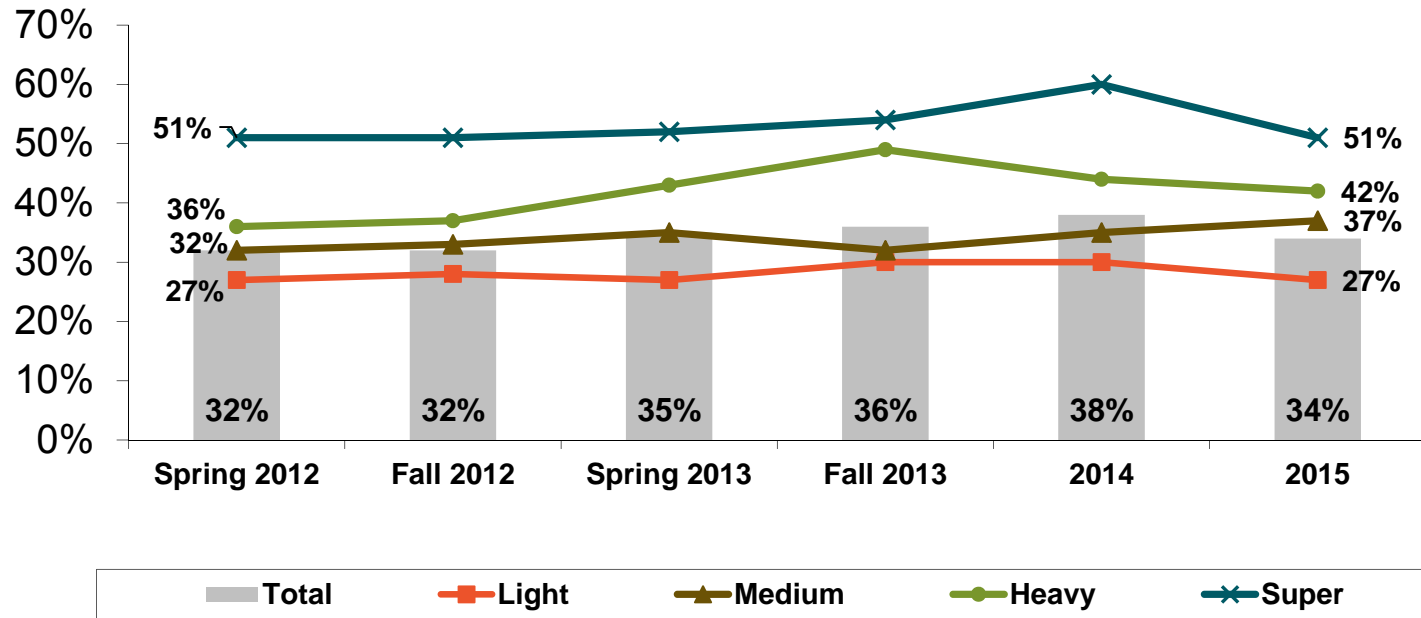
- Buying avocados for a baby or young children is still low, but it is trending up – driven by Super users.



Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.

## Calories as a Reason to Purchase Avocados

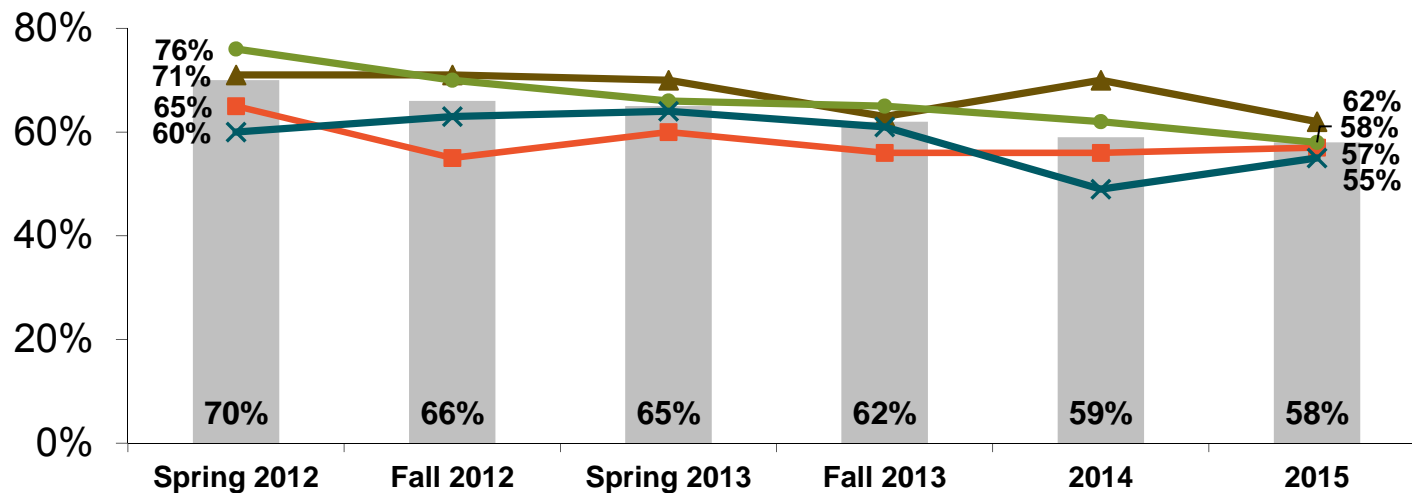
- The amount of calories in avocados is a moderately low driver of purchase overall, but relatively strong among Super users.



Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.

## Decided Not To Buy Avocados Because of Price 2015

- There is not as much variance in sensitivity to price across the segments as seen last year.
- The price users consider to be too high has remained fairly steady over time, with only minimal variance across groups.



**Price Ceiling:**

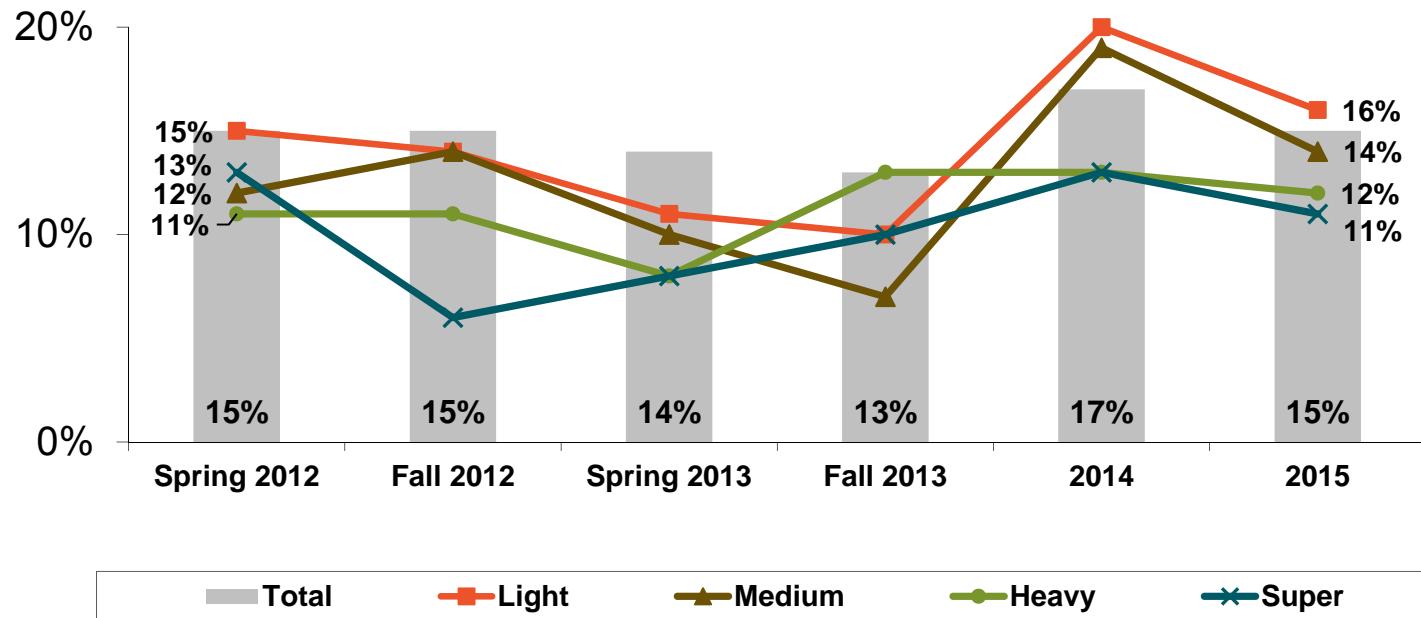
**Total: \$1.81**  
**Light: \$1.87**  
**Medium: \$1.74**  
**Heavy: \$1.85**  
**Super: \$1.81**



Q505 - Have you ever decided not to buy Avocados because the price was too high?  
 Q510 - And how high was that price?

# Price as a Barrier to Avocado Purchase 2015

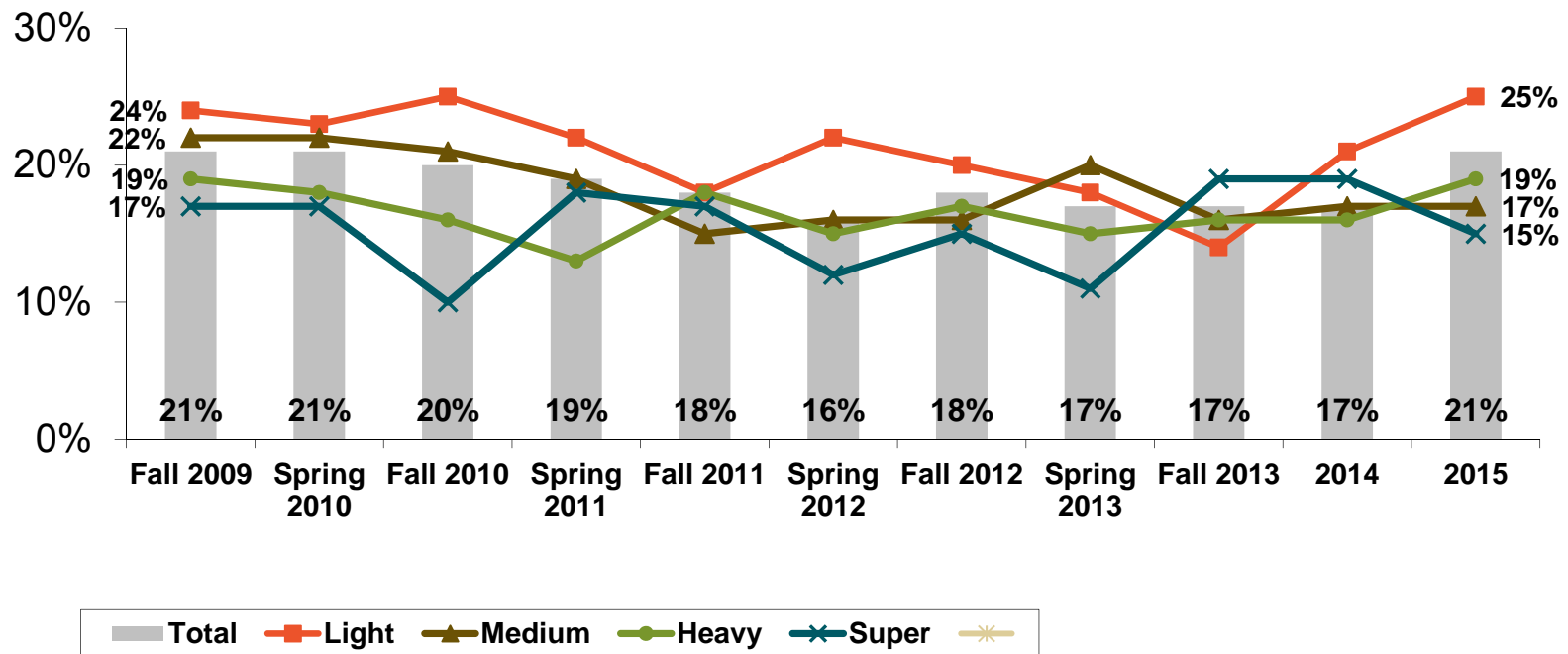
- Price as a barrier to purchasing avocados, while low overall, did see a spike last year – especially among Light and Medium users. Some of this has dissipated, but is not quite back to 2013 levels.



## Fat Content as a Barrier to Avocado Purchase

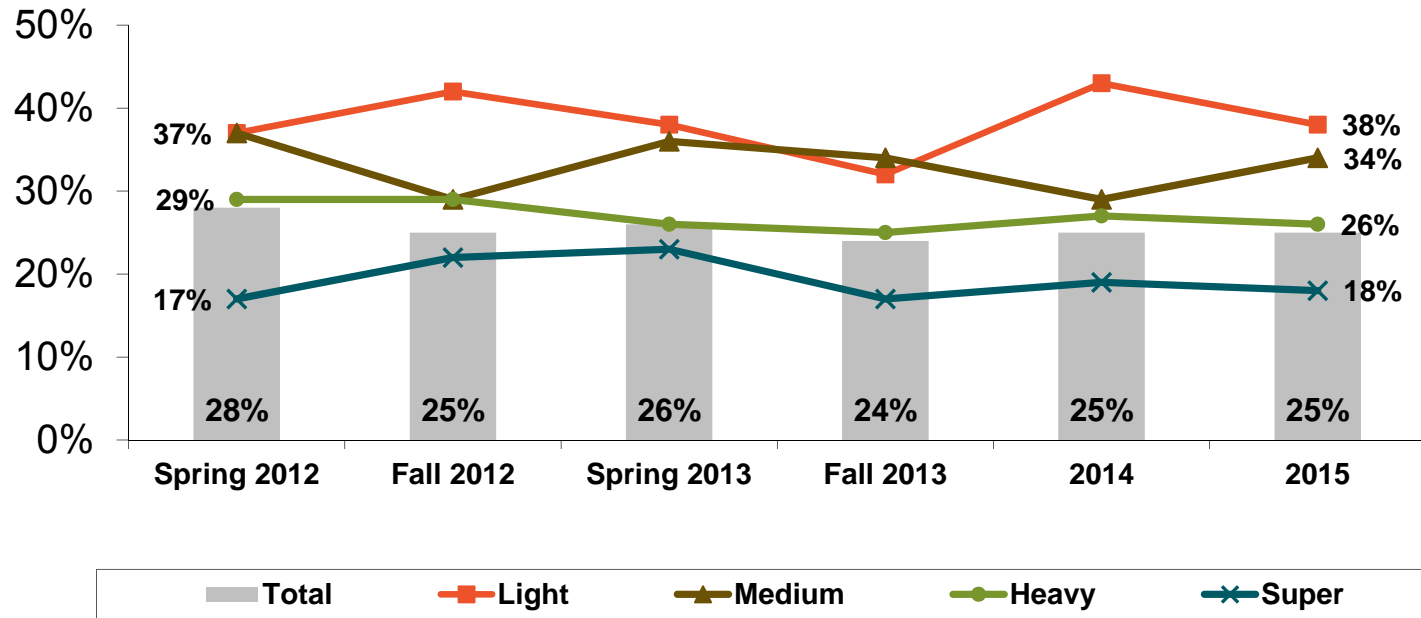
- Fat content is not a huge barrier for any group. While remaining steady overall, it has fluctuated somewhat across user groups, and has been trending back up among Light users.

*Note: The wording for “fat content” was changed from “fat and calorie content” at the fall 2009 wave. Therefore, results can not be trended before 2009.*



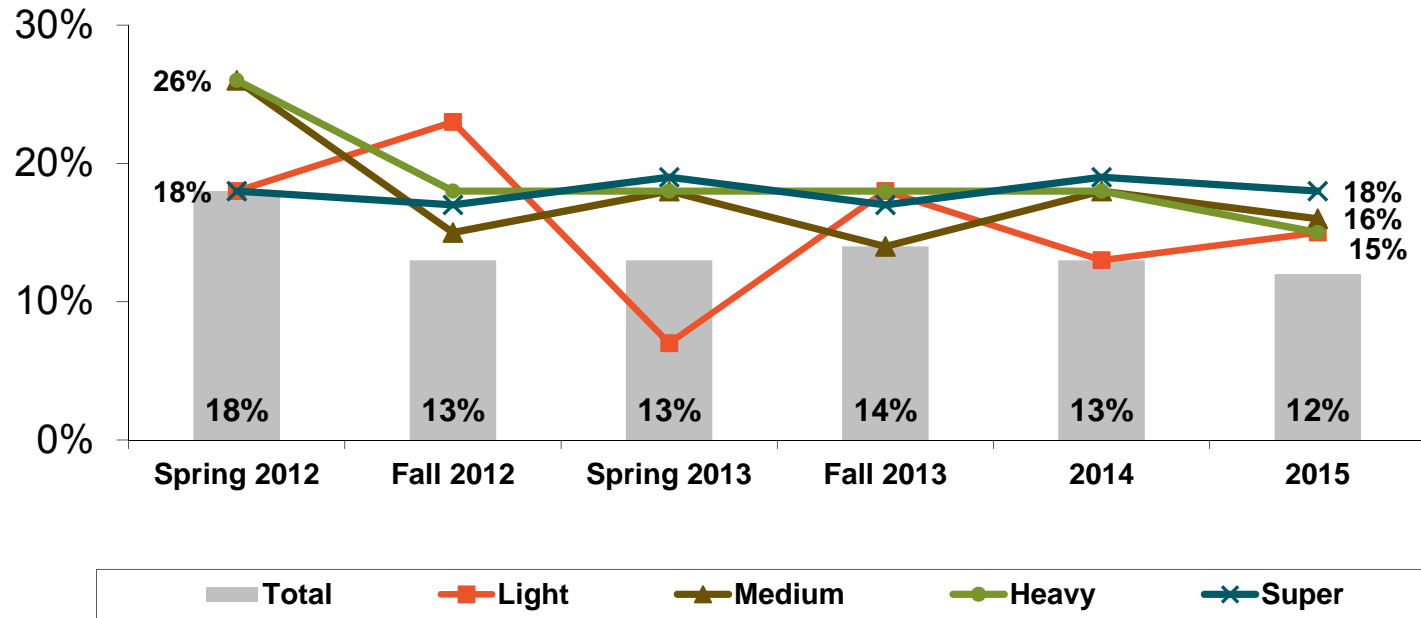
## Too Perishable as a Barrier to Avocado Purchase

- Perishability is a minor barrier to avocado purchases, but it is a much stronger barrier for Light and Medium users.



## Availability as a Barrier to Avocado Purchase

- Availability of avocados is not a strong barrier to purchase.





# Drivers and Barriers to Avocado Purchase 2015

- Summarized below are the key drivers and barriers to avocado purchase.

	Total %	Light %	Medium %	Heavy %	Super %
<b>Drivers of Avocado Purchase</b>					
Good for you	73	86	87	88	88
Nutritional benefits	70	81	85	85	84
Taste	68	83	87	89	86
Quality	62	74	74	79	82
Variety of uses	61	66	76	79	83
Ripeness	57	66	73	73	74
Appearance in stores	44	49	54	58	61
Price	45	48	55	58	60
Can be substituted for other foods/ingredients	45	47	48	58	69
Being organically grown	39	39	42	52	61
They are a staple in my household	39	20	35	71	77
Calories	34	27	37	42	51
Fat content	36	34	40	46	57
I buy them for my baby/young child to eat	16	10	12	21	41
<b>Barriers to Avocado Purchase</b>					
Too perishable	28	38	34	26	18
Family doesn't like them	20	15	6	6	4
Fat content	21	25	17	19	15
Price	15	16	14	12	11
Availability	12	15	16	15	18
Don't know how to use them	11	8	4	3	3

Q475 - Below is a list why you personally might or might not buy Avocados. For each item, please select whether it is a reason that you would buy Avocados.

Q485 - What reasons, if any, do you have for not buying avocados?

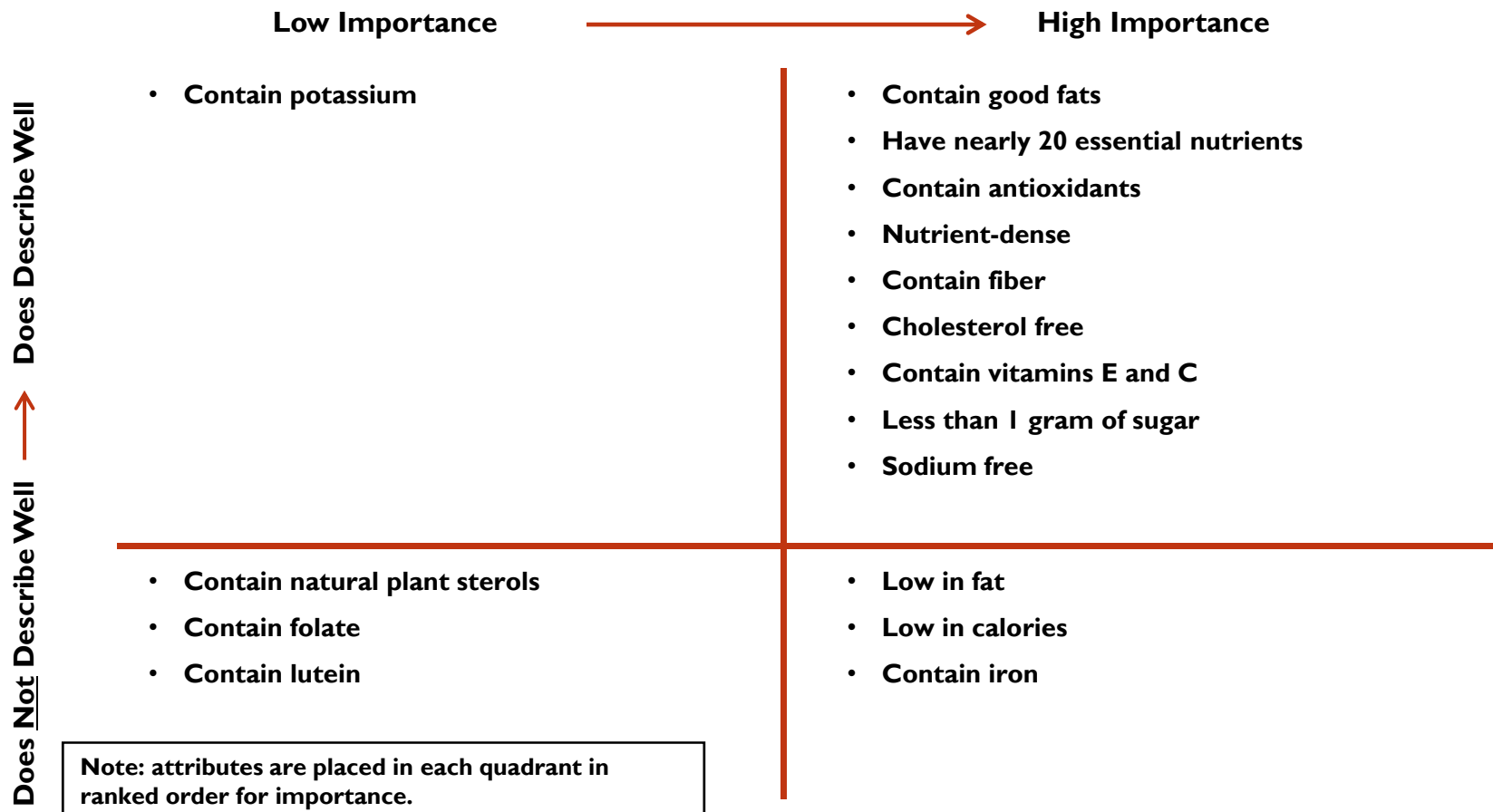




# Nutrition, Wellness, and Food Safety

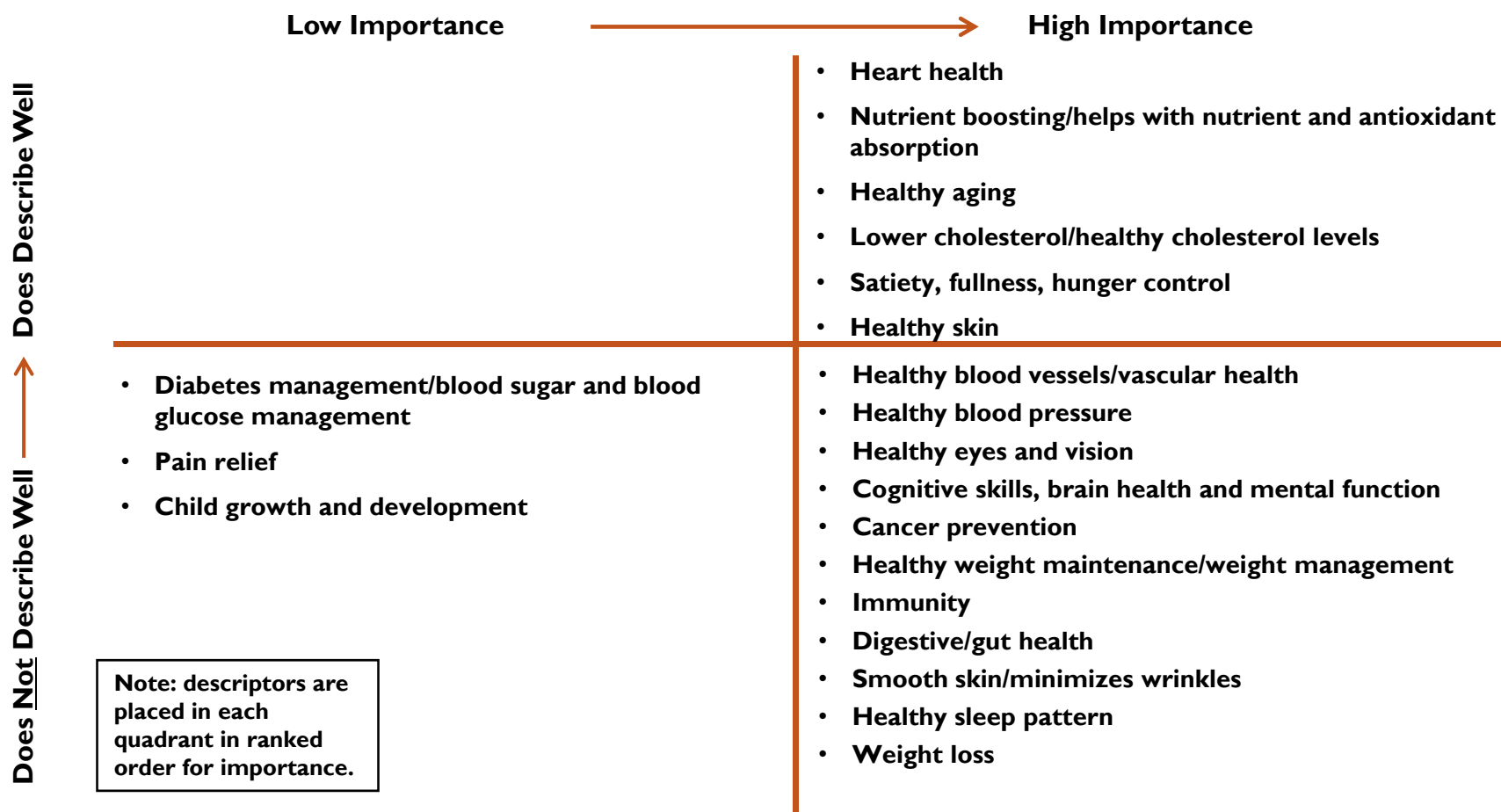
# Nutritional Attributes and Importance

- Avocados are believed to deliver on 9 of the 12 nutritional attributes of high importance to users.
- There was minimal movement across the quadrants since last fall. However, potassium shifted from high to low importance.
- Natural plant sterols, folate and lutein are of low importance to users when deciding whether to buy avocados. This was also true for the previous wave.



# Health & Wellness Descriptors and Importance

- Avocados are believed to deliver on 6 of the 17 health & wellness benefits of high importance to users.
- Diabetes management, pain relief and child growth/development are currently of low importance to users when deciding whether to buy avocados.





## Nutritional Attributes Importance 2015 (Top 3-box\* Scores)

- As seen in the past, Heavy and Super users place more importance on all of the nutritional attributes than do the other groups.
- In older waves, Medium and Light users were similar in the level of importance placed on many, but not all, of the attributes. For the last four waves, Medium users place more importance than Light users on many measures.

	Total %	Light %	Medium %	Heavy %	Super %
Contain good fats	54	47	59	66	79
Have nearly 20 essential nutrients	53	46	55	64	75
Contain antioxidants	50	40	55	59	76
Nutrient-dense	48	46	51	59	71
Cholesterol free	47	43	46	56	68
Contain fiber	47	38	49	55	70
Less than 1 gram of sugar	46	37	42	54	72
Contain vitamins E and C	46	36	46	56	73
Sodium free	43	32	42	51	67
Contain potassium	43	31	44	51	67
Low in fat	42	36	37	47	63
Low in calories	41	31	38	46	61
Contain iron	40	29	39	48	66
Contain natural plant sterols	38	29	39	47	63
Contain lutein	34	24	33	38	60
Contain folate	34	26	30	43	59

Q1025a - How important to you are each of the following nutritional benefits when deciding whether or not to buy avocados? Please answer using a scale from 0 to 10 where a “0” means “Not at all important” and a “10” means “Extremely important” when deciding whether or not to buy avocados.

\*Top 3-box: 8, 9, or 10 on an eleven point scale



## Nutritional Attributes Associated with Avocados 2015 (Top 3-box\* Scores)

- A similar pattern is seen with nutritional attributes associated with avocados. Super users in particular associate many of the attributes with avocados.

	Total %	Light %	Medium %	Heavy %	Super %
Contain good fats	55	52	62	69	79
Have nearly 20 essential nutrients	48	43	52	60	70
Nutrient-dense	46	46	53	55	65
Contain fiber	45	45	49	52	65
Sodium free	45	43	45	55	63
Contain antioxidants	45	42	49	53	70
Contain vitamins E and C	45	39	46	56	67
Less than 1 gram of sugar	42	34	47	52	63
Cholesterol free	40	35	35	50	62
Contain potassium	39	28	40	48	62
High in fat	38	43	45	43	52
Contain natural plant sterols	38	36	43	44	61
High in calories	32	33	35	38	46
Contain iron	32	23	30	37	55
Contain folate	29	20	29	33	53
Contain lutein	28	19	24	32	52
Low in calories	28	18	21	30	51

Q1025 - To the best of your knowledge, how well does each of the following nutritional characteristics describe avocados? Please answer using a scale from 0 to 10 where a “0” means “Does not describe at all” and a “10” means “Describes perfectly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale



## Nutritional Attributes Associated with Avocados Total U.S. (Top 3-box\* Scores)

- Overtime, the general user has grown in their association of many nutritional attributes with avocados. However, several of these (highlighted in green) fell in comparison to last year.

	Spring 2012	Fall 2012	Spring 2013	Fall 2013	2014	2015
	%	%	%	%	%	%
Contain good fats	50	50	54	54	57	55
Have nearly 20 essential nutrients	44	45	46	50	52	48
Contain antioxidants	44	44	47	51	51	45
Contain vitamins E and C	42	41	44	47	48	45
Contain fiber	41	43	43	44	48	45
Nutrient-dense	41	41	43	47	47	46
Sodium free	38	41	43	44	46	45
High in fat	37	37	36	38	39	38
Contain potassium	36	37	38	41	42	39
Less than 1 gram of sugar	34	36	38	41	44	42
Cholesterol free	32	36	39	42	43	40
High in calories	32	32	32	34	34	32
Contain natural plant sterols	31	34	38	39	41	38
Contain iron	29	28	32	34	37	32
Contain folate	25	26	29	31	33	29
Low in calories	22	27	28	31	32	28
Contain lutein	22	23	26	29	30	28

Q1025 - To the best of your knowledge, how well does each of the following nutritional characteristics describe avocados? Please answer using a scale from 0 to 10 where a “0” means “Does not describe at all” and a “10” means “Describes perfectly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale



## Nutritional Attributes Associated with Avocados Light Users (Top 3-box\* Scores)

- Agreement with most nutritional attributes of avocados changed considerably among light users, in comparison to last year. There were especially strong decreases for contains iron, contains folate and has nearly 20 essential nutrients. At the same time, increases were seen for contains fiber, nutrient-dense and contains natural plant steroids.

	Spring 2012	Fall 2012	Spring 2013	Fall 2013	2014	2015
	%	%	%	%	%	%
Contain good fats	51	49	51	50	57	52
High in fat	46	40	42	31	42	43
Contain vitamins E and C	46	36	37	46	43	39
Contain fiber	44	37	28	37	38	45
Have nearly 20 essential nutrients	42	39	32	41	50	43
Nutrient-dense	40	39	38	38	40	46
Contain potassium	39	34	28	32	33	28
Contain antioxidants	38	43	39	49	46	42
Sodium free	37	34	37	36	40	43
Less than 1 gram of sugar	36	30	31	31	35	34
High in calories	32	31	31	25	33	33
Cholesterol free	31	33	31	36	38	35
Contain natural plant sterols	30	30	32	34	31	36
Contain iron	28	19	19	25	36	23
Contain folate	20	19	22	21	26	20
Contain lutein	20	18	17	18	18	19
Low in calories	19	19	17	26	18	18

Q1025 - To the best of your knowledge, how well does each of the following nutritional characteristics describe avocados? Please answer using a scale from 0 to 10 where a “0” means “Does not describe at all” and a “10” means “Describes perfectly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale



## Nutritional Attributes Associated with Avocados Medium Users (Top 3-box\* Scores)

- There have been several decreases in the levels of agreement over time with a few of the avocado nutritional attributes among Medium users. Most notable was a decrease for being low in calories.

	Spring 2012 %	Fall 2012 %	Spring 2013 %	Fall 2013 %	2014 %	2015 %
Contain good fats	61	56	63	63	66	62
Contain antioxidants	49	47	50	56	55	49
Have nearly 20 essential nutrients	46	48	52	60	54	52
Contain vitamins E and C	44	41	46	50	49	46
Contain fiber	42	49	48	49	50	49
Nutrient-dense	42	43	47	56	49	53
High in fat	40	42	40	42	44	45
Sodium free	40	42	46	51	47	45
High in calories	38	33	38	36	37	35
Less than 1 gram of sugar	37	38	44	47	46	47
Contain potassium	36	41	43	43	43	40
Cholesterol free	33	36	42	48	40	35
Contain natural plant sterols	30	36	43	41	42	43
Contain iron	25	34	31	34	32	30
Contain lutein	25	20	24	24	27	24
Contain folate	24	28	30	30	30	29
Low in calories	19	22	28	27	28	21

Q1025 - To the best of your knowledge, how well does each of the following nutritional characteristics describe avocados? Please answer using a scale from 0 to 10 where a “0” means “Does not describe at all” and a “10” means “Describes perfectly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale





## Nutritional Attributes Associated with Avocados Heavy Users (Top 3-box\* Scores)

- Heavy avocado users had increased their level of agreement over time with many of the nutritional attributes of avocados. However, several of these dropped this year, negating the strong build seen in 2013/2014. The most notable changes are for contains antioxidants, contains fiber, contains natural plant sterols, contains iron, contains folate, and low in calories.

	Spring 2012 %	Fall 2012 %	Spring 2013 %	Fall 2013 %	2014 %	2015 %
Contain good fats	65	68	69	66	70	69
Have nearly 20 essential nutrients	57	58	54	64	64	60
Contain vitamins E and C	55	53	55	58	60	56
Contain antioxidants	54	56	55	61	63	53
Nutrient-dense	54	54	54	59	56	55
Contain fiber	48	49	52	54	57	52
Contain potassium	47	47	43	51	51	48
High in fat	45	47	46	46	42	43
Sodium free	43	50	51	54	55	55
Less than 1 gram of sugar	42	50	48	52	54	52
Contain natural plant sterols	40	44	43	50	50	44
Cholesterol free	39	42	44	51	49	50
Contain iron	39	35	40	41	46	37
High in calories	36	40	40	39	40	38
Contain folate	33	32	34	44	40	33
Contain lutein	29	35	33	40	35	32
Low in calories	26	31	31	36	35	30

Q1025 - To the best of your knowledge, how well does each of the following nutritional characteristics describe avocados? Please answer using a scale from 0 to 10 where a “0” means “Does not describe at all” and a “10” means “Describes perfectly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale



## Nutritional Attributes Associated with Avocados Super Users (Top 3-box\* Scores)

- For the most part, agreement with nutritional attributes associated with avocados remained strong among Super users. Scores on two negative attributes, high in fat and high in calories, improved.

	Spring 2012 %	Fall 2012 %	Spring 2013 %	Fall 2013 %	2014 %	2015 %
Contain good fats	74	67	70	75	76	79
Contain antioxidants	66	60	66	69	68	70
Have nearly 20 essential nutrients	64	64	69	72	69	70
Contain vitamins E and C	64	57	63	66	69	67
Contain fiber	62	52	63	65	66	65
Sodium free	61	55	66	63	67	63
Nutrient-dense	60	57	58	65	70	65
Cholesterol free	57	53	60	59	64	62
Contain natural plant sterols	56	49	61	58	61	61
Contain potassium	55	56	62	64	64	62
Less than 1 gram of sugar	55	55	58	63	63	63
High in fat	53	47	43	54	59	52
Contain iron	52	45	54	57	58	55
Contain folate	49	45	51	55	56	53
High in calories	49	44	43	53	53	46
Contain lutein	46	35	42	53	54	52
Low in calories	43	38	43	51	53	51

Q1025 - To the best of your knowledge, how well does each of the following nutritional characteristics describe avocados? Please answer using a scale from 0 to 10 where a “0” means “Does not describe at all” and a “10” means “Describes perfectly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale



## Health & Wellness Benefits Importance 2015 (Top 3-box\* Scores)

- The importance of health and wellness benefits also skews higher as usage increases.

	Total %	Light %	Medium %	Heavy %	Super %
Heart health	52	47	51	62	76
Healthy blood pressure	49	40	48	59	75
Healthy blood vessels/ vascular health	49	40	47	60	73
Healthy aging	49	41	51	59	74
Nutrient boosting/helps with nutrient and antioxidant absorption	49	43	51	60	74
Lower cholesterol/ healthy cholesterol levels	48	41	48	60	70
Healthy eyes and vision	47	37	46	57	72
Cognitive skills, brain health and mental function	47	36	49	57	73
Healthy weight maintenance/weight management	46	42	44	53	71
Healthy skin	46	38	46	56	72
Cancer prevention	46	37	46	53	70
Satiety, fullness, hunger control	45	36	47	57	70
Immunity	45	34	44	55	72
Digestive/gut health	45	37	43	54	70
Smooth skin/minimizes wrinkles	42	33	42	53	70
Weight loss	40	30	39	47	64
Healthy sleep pattern	40	28	37	48	67
Diabetes management/ blood sugar and blood glucose management	38	25	37	44	65
Pain relief	35	23	30	40	63
Child growth and development	31	18	24	37	63

Q1025c - How important to you are each of the following health and wellness benefits when deciding whether or not to buy avocados? Please answer using a scale from 0 to 10 where a “0” means “Not at all important” and a “10” means “Extremely important” when deciding whether or not to buy avocados.

\*Top 3-box: 8, 9, or 10 on an eleven point scale



## Health & Wellness Benefits Associated with Avocados 2015 (Top 3-box\* Scores)

- Larger proportions of both Heavy and Super users associate all of the health and wellness benefits with avocados than do Medium and Light users. Light users have particularly low health and wellness associations with avocados.

	Total %	Light %	Medium %	Heavy %	Super %
Heart health	43	39	45	53	67
Nutrient boosting/helps with nutrient and antioxidant absorption	43	31	45	58	70
Lower cholesterol/ healthy cholesterol levels	41	38	38	52	67
Healthy skin	40	28	42	52	72
Satiety, fullness, hunger control	39	33	40	50	69
Healthy aging	38	27	38	50	67
Healthy blood pressure	37	26	33	47	67
Healthy blood vessels/ vascular health	37	28	36	47	64
Healthy weight maintenance/weight management	35	23	34	40	65
Smooth skin/minimizes wrinkles	35	21	33	46	68
Digestive/gut health	35	20	32	45	65
Healthy eyes and vision	34	20	31	42	63
Cognitive skills, brain health and mental function	34	19	35	43	64
Immunity	33	30	30	42	61
Cancer prevention	32	22	33	38	58
Diabetes management/ blood sugar and blood glucose management	31	20	28	37	60
Weight loss	29	20	26	33	57
Healthy sleep patterns	26	13	21	33	57
Child growth and development	25	15	20	32	55
Pain relief	21	9	16	25	45

Q1025b - To the best of your knowledge, how strongly do you associate each of the following health and wellness benefits with the regular consumption of avocados? Please answer using a scale from 0 to 10 where a “0” means you “Do not associate at all” and a “10” means you “Associate very strongly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale



## Health & Wellness Benefits Associated with Avocados

### Total U.S. (Top 3-box\* Scores)

- Agreement with the various health & wellness benefits associated with avocados has gradually increased over time. There were many strong increases this year.

	Spring 2012	Fall 2012	Spring 2013	Fall 2013	2014	2015
	%	%	%	%	%	%
Nutrient boosting/helps with nutrient and antioxidant absorption	40	40	40	45	45	49
Healthy skin	36	39	40	42	43	46
Heart health	36	40	40	45	43	52
Lower cholesterol/healthy cholesterol levels	35	37	37	42	41	48
Healthy aging	33	36	38	40	40	49
Satiety, fullness, hunger control	32	36	36	40	41	45
Healthy blood vessels/vascular health	32	35	35	41	39	49
Smooth skin/minimizes wrinkles	32	34	36	37	37	42
Healthy blood pressure	31	34	34	39	39	49
Healthy weight maintenance/weight management	30	32	33	36	37	46
Healthy eyes and vision	28	33	33	38	37	47
Cognitive skills, brain health and mental function	28	32	32	36	36	47
Cancer prevention	26	31	32	34	33	46
Diabetes management/blood sugar and blood glucose management	25	30	30	33	34	38
Weight loss	23	26	26	30	30	40
Child growth and development	22	25	25	28	28	31
Digestive/gut health	NA	NA	NA	NA	38	45
Immunity	NA	NA	NA	NA	34	45
Healthy sleep patterns	NA	NA	NA	NA	29	40
Pain relief	NA	NA	NA	NA	27	35

Q1025b - To the best of your knowledge, how strongly do you associate each of the following health and wellness benefits with the regular consumption of avocados? Please answer using a scale from 0 to 10 where a “0” means you “Do not associate at all” and a “10” means you “Associate very strongly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale



## Health & Wellness Benefits Associated with Avocados

### Light Users (Top 3-box\* Scores)

- Light users, which last year experienced a relapse in their agreement with many of the health and wellness benefits associated with avocados, more than bounced back. Scores are now higher than ever seen in previous years.

	Spring 2012	Fall 2012	Spring 2013	Fall 2013	2014	2015
	%	%	%	%	%	%
Nutrient boosting/helps with nutrient and antioxidant absorption	31	30	28	34	29	43
Lower cholesterol/healthy cholesterol levels	29	26	29	33	30	41
Satiety, fullness, hunger control	29	28	26	28	30	36
Heart health	27	31	26	37	32	47
Healthy blood pressure	25	21	23	30	23	40
Healthy blood vessels/vascular health	24	22	20	34	23	40
Healthy skin	23	32	30	32	28	38
Smooth skin/minimizes wrinkles	23	27	27	25	27	33
Healthy aging	23	28	28	26	24	41
Healthy weight maintenance/weight management	22	23	19	30	30	42
Cognitive skills, brain health and mental function	22	24	16	24	20	36
Healthy eyes and vision	21	25	15	28	24	37
Diabetes management/blood sugar and blood glucose management	17	19	18	18	19	25
Weight loss	16	19	15	19	18	30
Cancer prevention	15	23	18	27	19	37
Child growth and development	11	17	11	17	12	18
Digestive/gut health	NA	NA	NA	NA	25	37
Immunity	NA	NA	NA	NA	16	34
Healthy sleep patterns	NA	NA	NA	NA	14	28
Pain relief	NA	NA	NA	NA	8	23

Q1025b - To the best of your knowledge, how strongly do you associate each of the following health and wellness benefits with the regular consumption of avocados? Please answer using a scale from 0 to 10 where a “0” means you “Do not associate at all” and a “10” means you “Associate very strongly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale **46**



## Health & Wellness Benefits Associated with Avocados

### Medium Users (Top 3-box\* Scores)

- Medium users increased their level of agreement this year with all of the health and wellness benefits of avocados.

	Spring 2012 %	Fall 2012 %	Spring 2013 %	Fall 2013 %	2014 %	2015 %
Nutrient boosting/helps with nutrient and antioxidant absorption	37	44	48	47	45	51
Heart health	36	48	45	43	43	51
Healthy skin	33	44	46	40	41	46
Lower cholesterol/healthy cholesterol levels	32	44	41	42	40	48
Healthy aging	31	43	43	40	39	51
Satiety, fullness, hunger control	30	39	45	42	42	47
Healthy blood vessels/vascular health	30	39	39	37	35	47
Healthy blood pressure	29	38	35	33	36	48
Healthy weight maintenance/weight management	28	33	34	33	36	44
Healthy eyes and vision	27	36	34	33	34	46
Smooth skin/minimizes wrinkles	27	38	38	32	33	42
Cognitive skills, brain health and mental function	26	36	33	31	32	49
Cancer prevention	22	35	35	29	29	46
Diabetes management/blood sugar and blood glucose management	20	30	29	24	31	37
Weight loss	20	27	27	24	26	39
Child growth and development	19	23	23	23	19	24
Digestive/gut health	NA	NA	NA	NA	33	43
Immunity	NA	NA	NA	NA	32	44
Healthy sleep patterns	NA	NA	NA	NA	24	37
Pain relief	NA	NA	NA	NA	20	30

Q1025b - To the best of your knowledge, how strongly do you associate each of the following health and wellness benefits with the regular consumption of avocados? Please answer using a scale from 0 to 10 where a “0” means you “Do not associate at all” and a “10” means you “Associate very strongly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale



## Health & Wellness Benefits Associated with Avocados

### Heavy Users (Top 3-box\* Scores)

- Heavy users increased their level of agreement this year with almost all health and wellness benefits of avocados.

	Spring 2012	Fall 2012	Spring 2013	Fall 2013	2014	2015
	%	%	%	%	%	%
Nutrient boosting/helps with nutrient and antioxidant absorption	54	51	50	58	55	60
Healthy skin	51	49	53	55	52	56
Heart health	49	51	54	60	52	62
Healthy aging	47	45	50	51	49	59
Smooth skin/minimizes wrinkles	45	46	48	52	46	53
Lower cholesterol/healthy cholesterol levels	44	49	47	54	49	60
Satiety, fullness, hunger control	43	49	48	53	49	57
Healthy blood vessels/vascular health	42	47	46	53	48	60
Healthy blood pressure	38	45	47	52	50	59
Healthy weight maintenance/weight management	38	43	45	47	42	53
Cognitive skills, brain health and mental function	37	42	43	51	46	57
Healthy eyes and vision	37	43	44	50	45	57
Cancer prevention	35	41	42	47	39	53
Diabetes management/blood sugar and blood glucose management	30	38	41	44	39	44
Child growth and development	30	35	34	40	36	37
Weight loss	30	34	32	43	33	47
Digestive/gut health	NA	NA	NA	NA	46	54
Immunity	NA	NA	NA	NA	41	55
Healthy sleep patterns	NA	NA	NA	NA	33	48
Pain relief	NA	NA	NA	NA	25	40

Q1025b - To the best of your knowledge, how strongly do you associate each of the following health and wellness benefits with the regular consumption of avocados? Please answer using a scale from 0 to 10 where a “0” means you “Do not associate at all” and a “10” means you “Associate very strongly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale





## Health & Wellness Benefits Associated with Avocados

### Super Users (Top 3-box\* Scores)

- Super users have also increased their level of agreement this year with the majority of avocado health and wellness benefits.

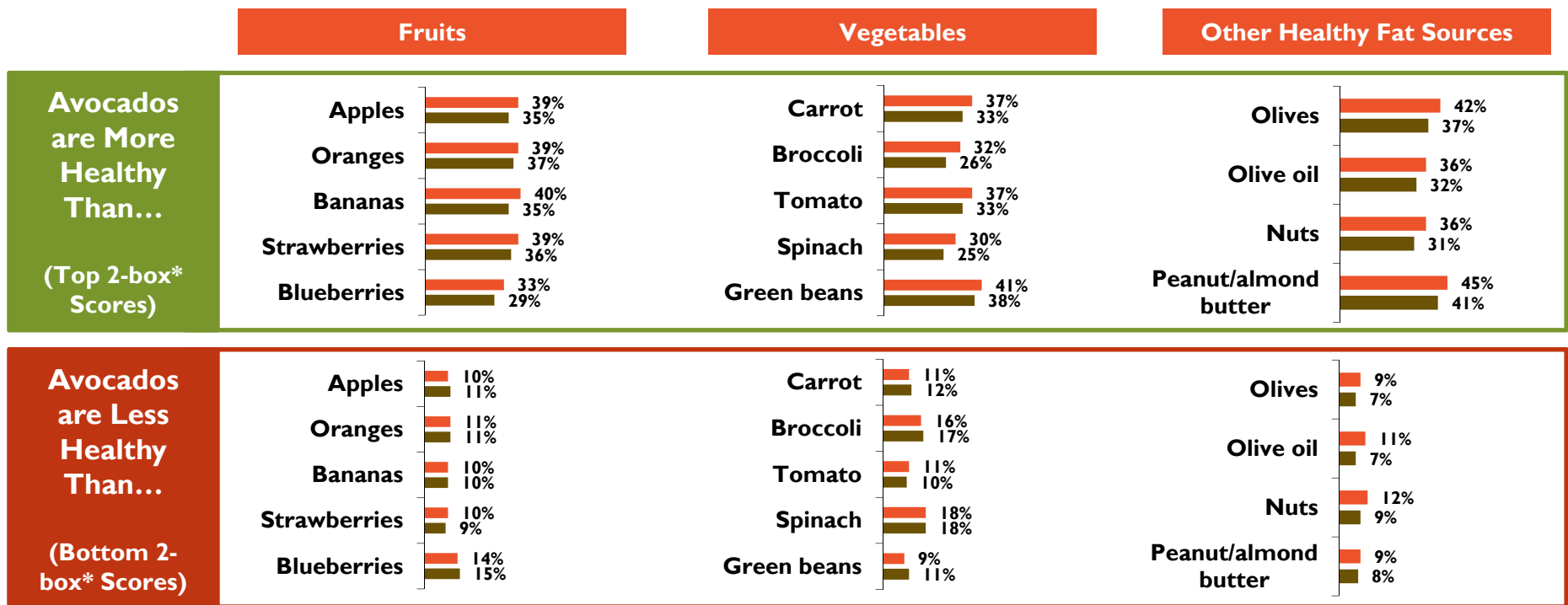
	Spring 2012 %	Fall 2012 %	Spring 2013 %	Fall 2013 %	2014 %	2015 %
Nutrient boosting/helps with nutrient and antioxidant absorption	67	58	63	69	73	74
Healthy skin	64	61	59	67	72	72
Smooth skin/minimizes wrinkles	61	56	59	63	63	70
Satiety, fullness, hunger control	60	61	56	66	69	70
Lower cholesterol/healthy cholesterol levels	60	58	58	63	67	70
Heart health	59	63	64	67	71	76
Healthy blood vessels/vascular health	57	58	57	63	68	73
Healthy aging	57	60	59	62	67	74
Healthy blood pressure	57	54	58	62	67	75
Healthy eyes and vision	56	55	58	63	67	72
Healthy weight maintenance/weight management	56	53	59	57	65	71
Cognitive skills, brain health and mental function	56	53	60	62	62	73
Cancer prevention	52	52	56	58	61	70
Diabetes management/blood sugar and blood glucose management	51	51	53	59	59	65
Child growth and development	50	51	51	51	59	63
Weight loss	46	46	45	53	57	64
Digestive/gut health	NA	NA	NA	NA	66	70
Immunity	NA	NA	NA	NA	63	72
Healthy sleep patterns	NA	NA	NA	NA	60	67
Pain relief	NA	NA	NA	NA	47	63

Q1025b - To the best of your knowledge, how strongly do you associate each of the following health and wellness benefits with the regular consumption of avocados? Please answer using a scale from 0 to 10 where a “0” means you “Do not associate at all” and a “10” means you “Associate very strongly”.

\*Top 3-box: 8, 9, or 10 on an eleven point scale

# Avocado Healthfulness Compared to Other Foods

- Avocados continue to be considered to be healthier than the various fruits, vegetables and healthy fat sources monitored in this study.



2014 2015

Q1100 – Thinking about the other fruits that you consume and the benefits they provide, do you feel that avocados are more healthy, equally healthy, or less healthy than these fruits:

Q1101 – Thinking about the other vegetables that you consume and the benefits they provide, do you feel that avocados are more healthy, equally healthy, or less healthy than these vegetables:

Q1102 – Thinking about these other healthy fat foods and the benefits they provide, do you feel that avocados are more healthy, equally healthy, or less healthy than these foods:

\*Top 2-box: 4 or 5 (More healthy) a 5-point scale  
 \*Bottom 2-box: 1 or 2 (Less healthy) on a 5-point scale



# Avocado Healthfulness Compared to Other Foods 2015

- As avocado consumption increases, so do the “better than” scores for avocados; in comparison to fruits, vegetables and other healthy fat sources.

	Light %	Medium %	Heavy %	Super %
<b>Fruits</b>				
Apples	33	33	39	47
Oranges	30	36	40	54
Bananas	28	39	40	49
Strawberries	35	34	42	49
Blueberries	23	22	38	44
<b>Vegetables</b>				
Carrots	31	33	37	46
Broccoli	20	22	32	44
Tomatoes	32	30	41	44
Spinach	20	23	28	43
Green beans	36	44	43	47
<b>Other Healthy Fat Sources</b>				
Olives	37	37	44	52
Olive Oil	34	28	36	49
Nuts	32	31	34	45
Peanut/almond butter	46	39	46	52

Q1100 – Thinking about the other fruits that you consume and the benefits they provide, do you feel that avocados are more healthy, equally healthy, or less healthy than these fruits:

Q1101 –Thinking about the other vegetables that you consume and the benefits they provide, do you feel that avocados are more healthy, equally healthy, or less healthy than these vegetables:

Q1102 – Thinking about these other healthy fat foods and the benefits they provide, do you feel that avocados are more healthy, equally healthy, or less healthy than these foods:

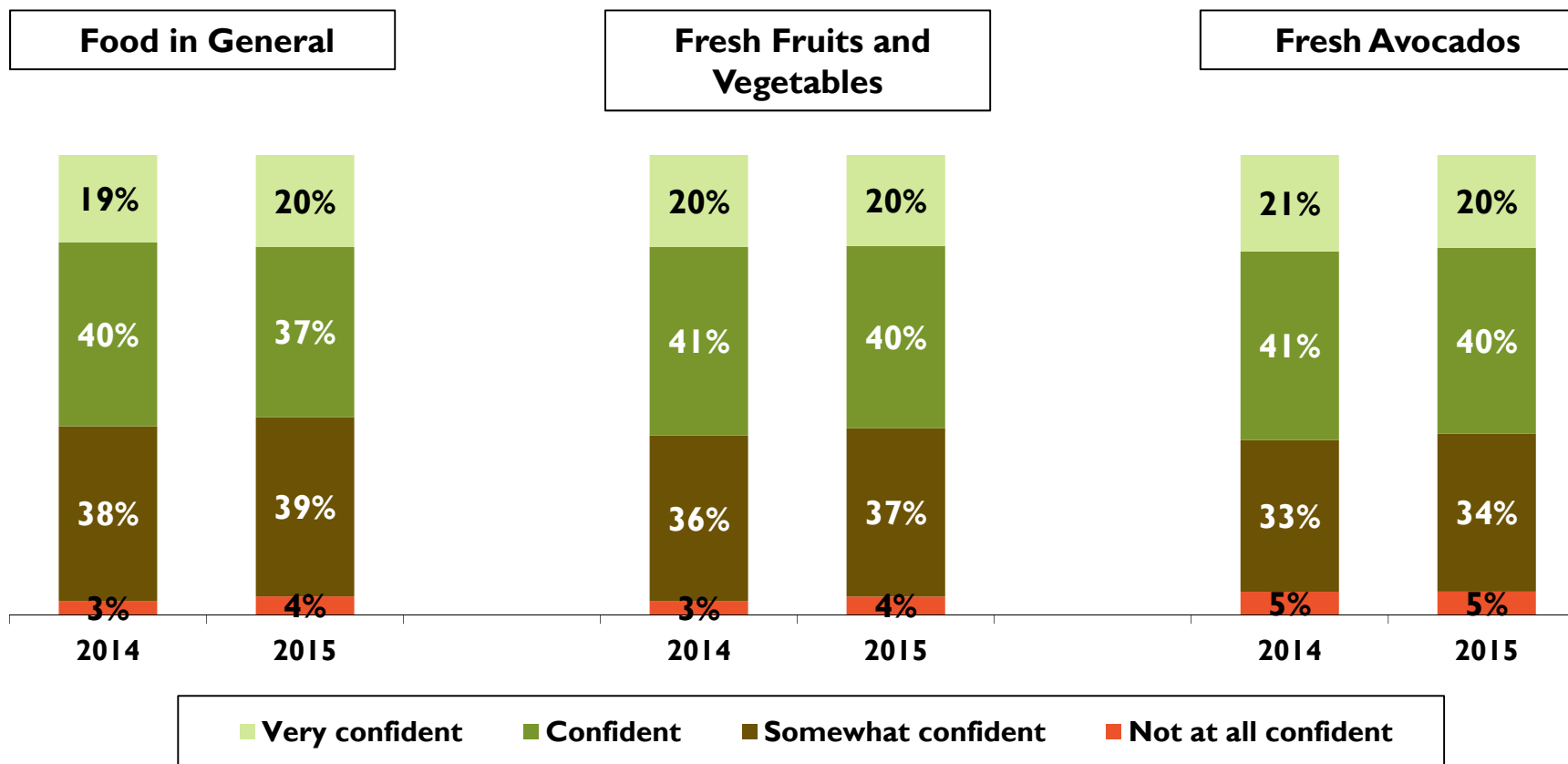
\*Top 2-box: 4 or 5 (More healthy) a 5-point scale



# Confidence in Safety of Food Purchased

Total U.S. 2015

- Confidence in food safety is similar for food in general, fresh fruits and vegetables and avocados.
- Scores remain similar to last year.

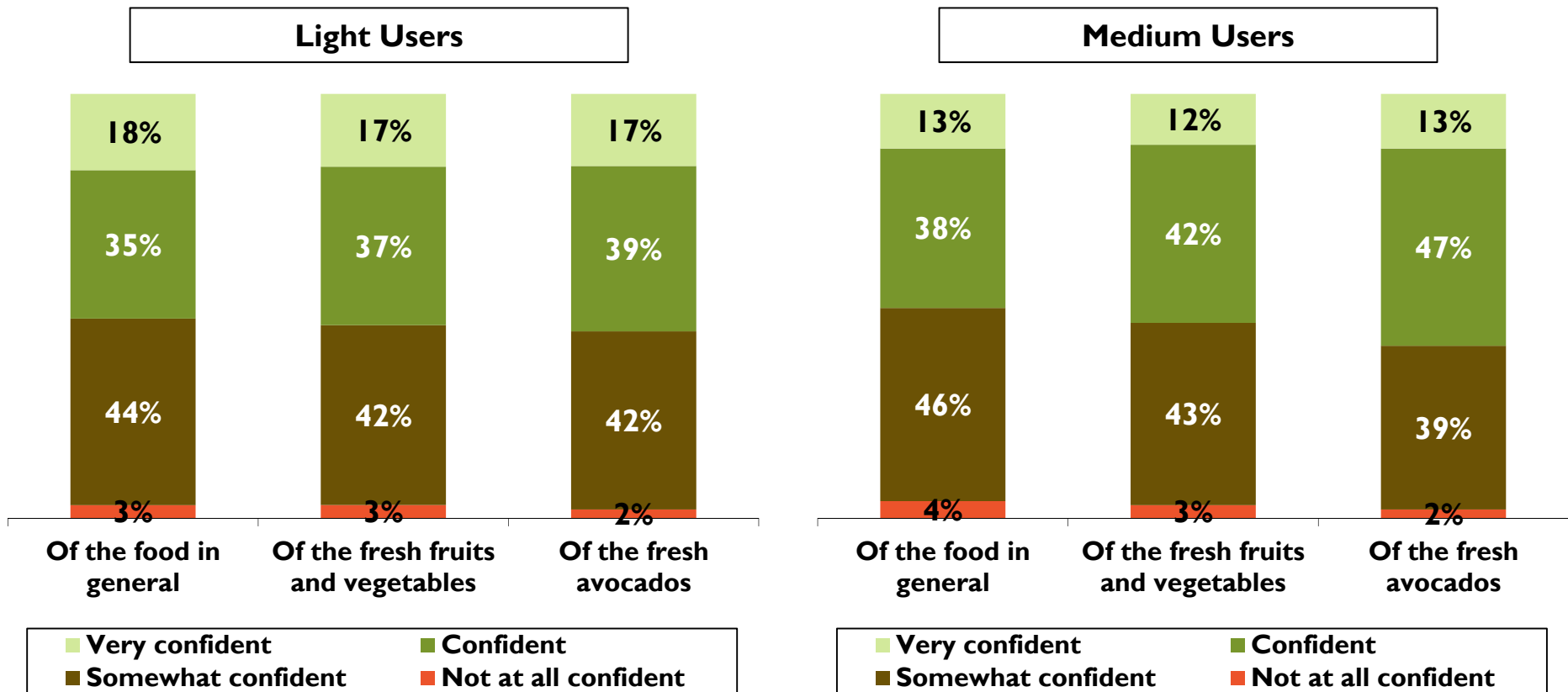


Q1105 – Overall, how confident are you in the safety of the food that you purchase in the stores where you regularly shop for your groceries?  
 Q1106 – Overall, how confident are you in the safety of the fresh fruits and vegetables that you purchase in the stores where you regularly shop?  
 Q1107 – Overall, how confident are you in the safety of the fresh avocados that you purchase in the stores where you regularly shop?

# Confidence in Safety of Food Purchased

Light and Medium Users 2015

- Last year, Light users were more confidence in the food safety of avocados than they were for other fruits and vegetables or food in general. This year, their safety confidence is similar across products. Medium users continue to have elevated confidence for avocados.

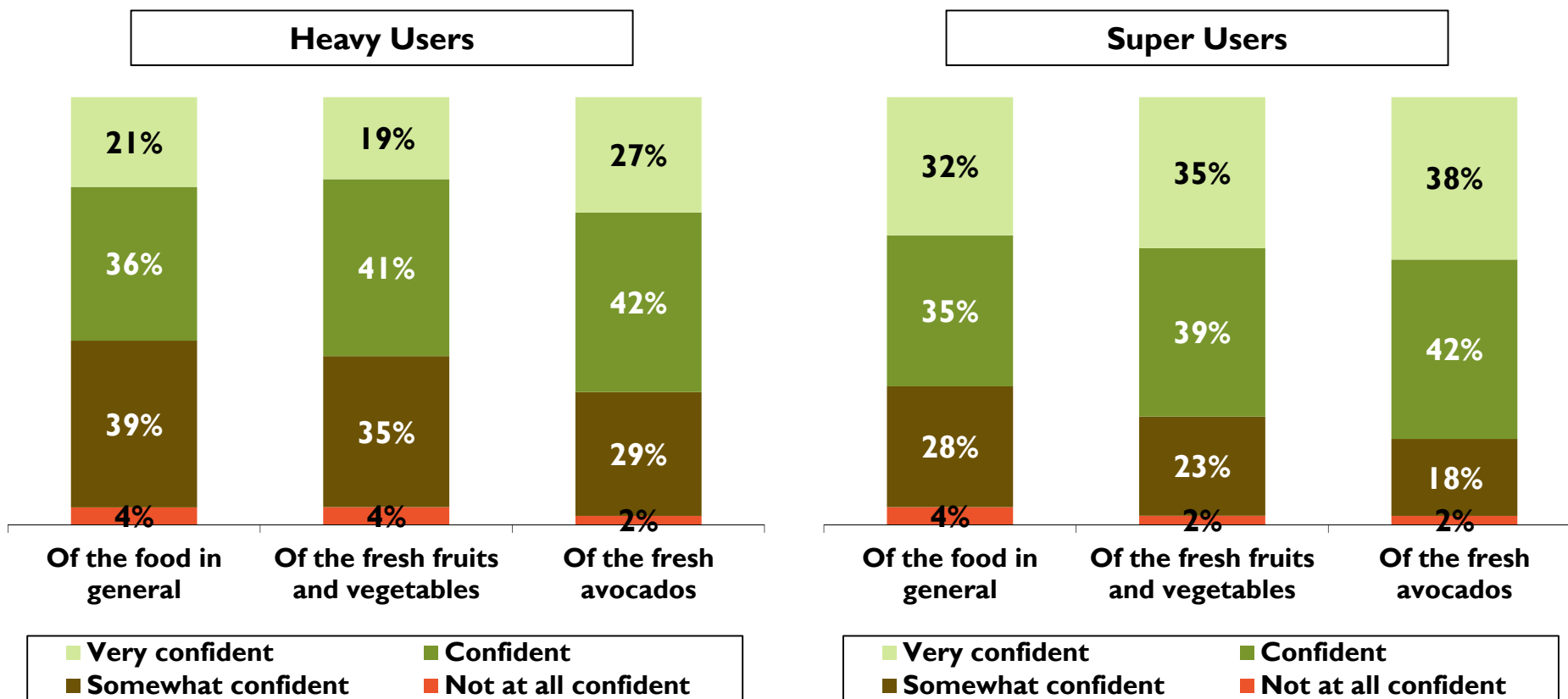


Q1105 – Overall, how confident are you in the safety of the food that you purchase in the stores where you regularly shop for your groceries?  
 Q1106 – Overall, how confident are you in the safety of the fresh fruits and vegetables that you purchase in the stores where you regularly shop?  
 Q1107 – Overall, how confident are you in the safety of the fresh avocados that you purchase in the stores where you regularly shop?

# Confidence in Safety of Food Purchased

## Heavy and Super Users 2015

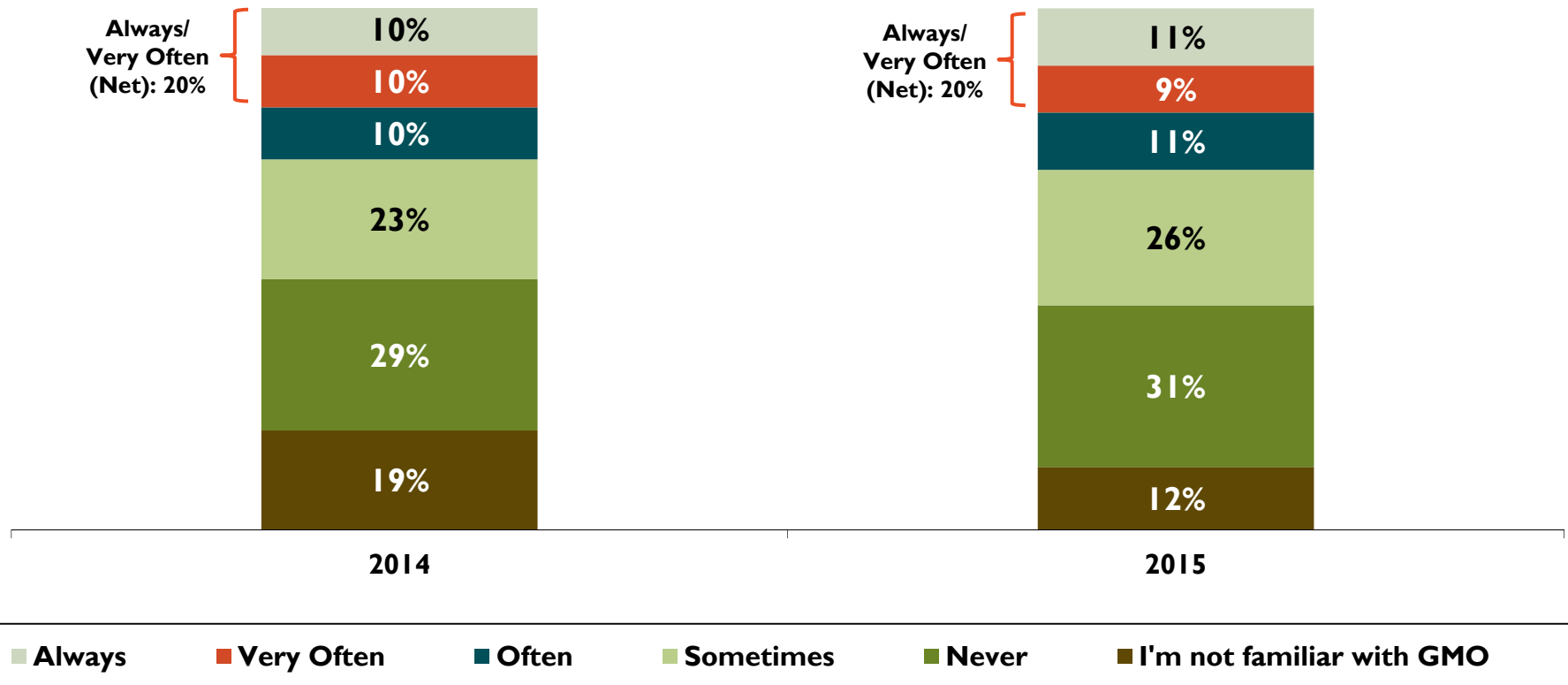
- Both Heavy and Super users are also more confidence in the food safety of avocados than they are for other fruits and vegetables or food in general. This was also true last year.
  - Super users have more confidence in food safety overall.



Q1105 – Overall, how confident are you in the safety of the food that you purchase in the stores where you regularly shop for your groceries?  
 Q1106 – Overall, how confident are you in the safety of the fresh fruits and vegetables that you purchase in the stores where you regularly shop?  
 Q1107 – Overall, how confident are you in the safety of the fresh avocados that you purchase in the stores where you regularly shop?

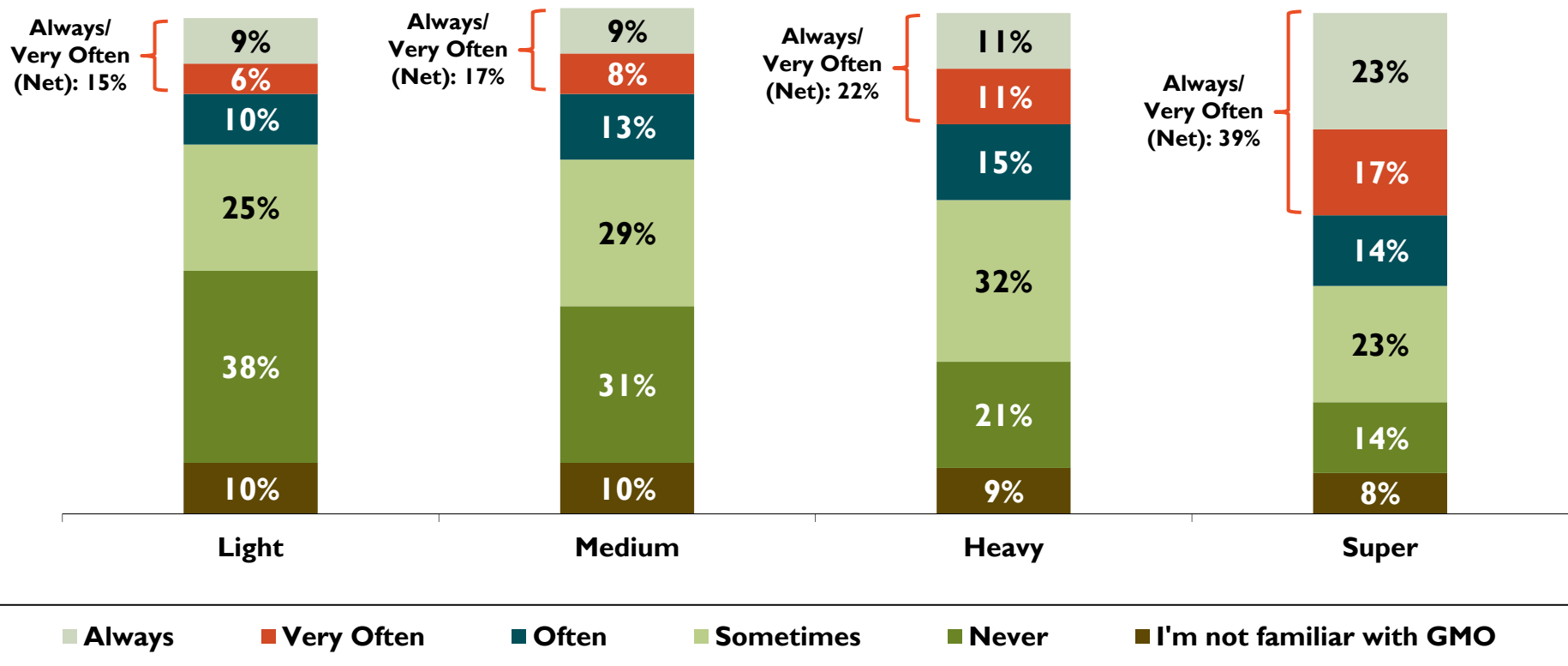
# Frequency of Checking if Food Product is GMO Free Total U.S.

- As seen last year, one-fifth of users regularly check to see if a food is GMO free.
- Lack of familiarity with GMO has decreased since last year.



# Frequency of Checking if Food Product is GMO Free 2015

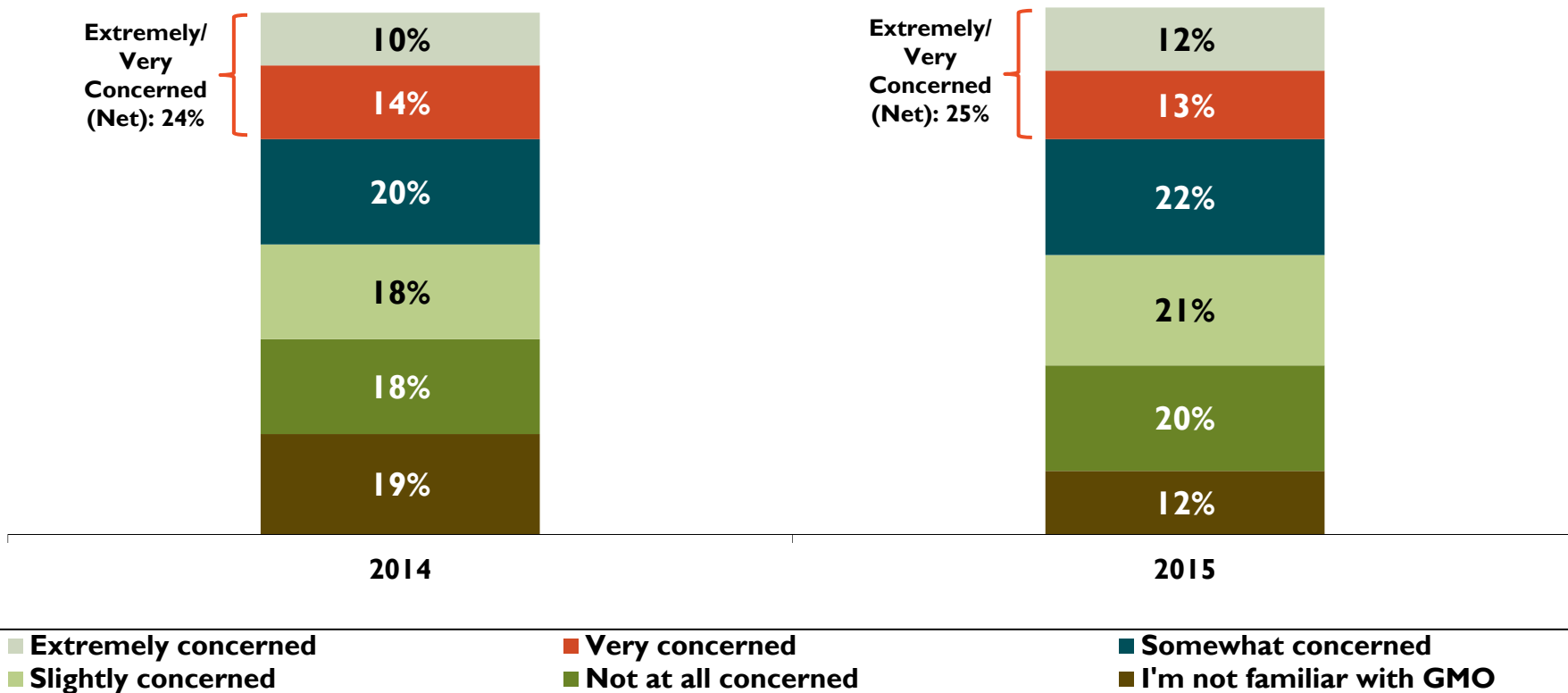
- As avocado usage increases, so does the frequency of checking to see if a food is GMO free.





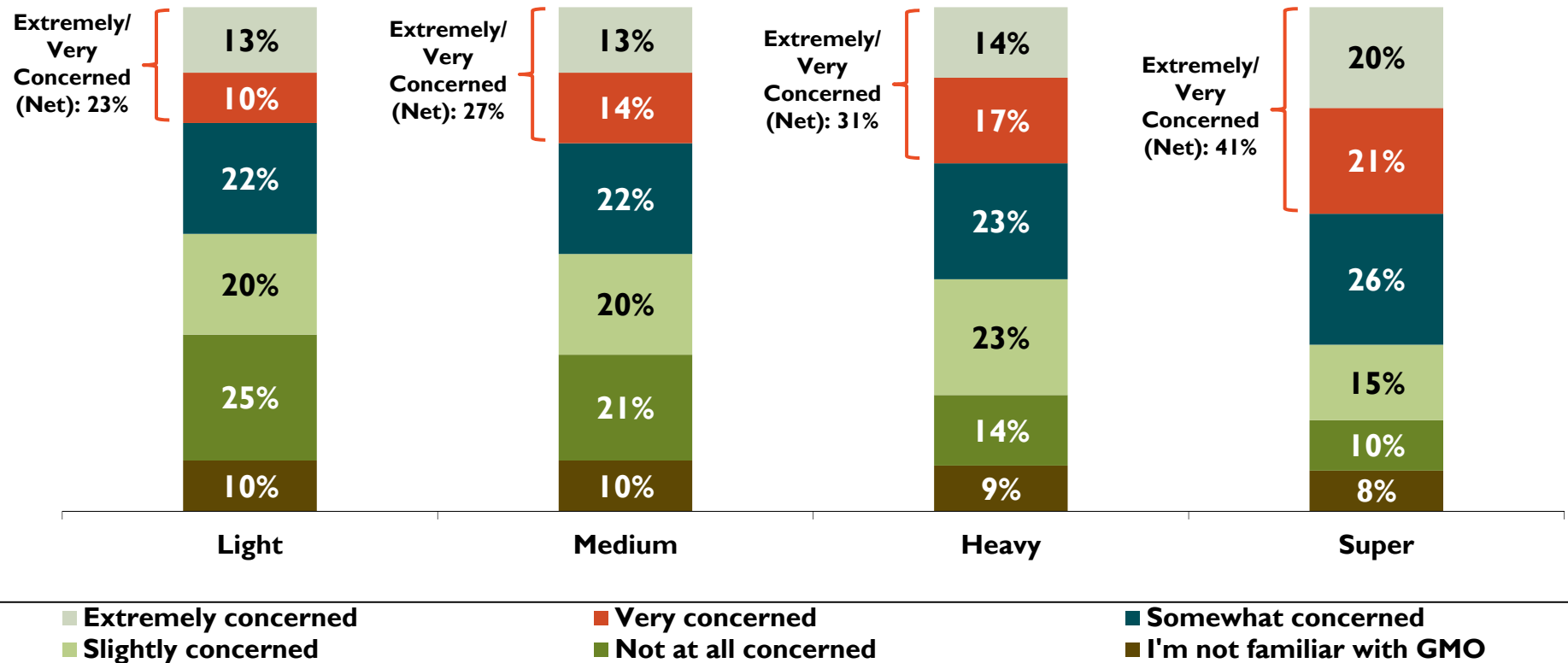
# Concern About Consuming Foods That Are GMO or Contain GMO Total U.S.

- As seen last year, about one-quarter of consumers express strong concern about consuming GMO foods.



# Concern About Consuming Foods That Are GMO or Contain GMO 2015

- As seen last year, the heavier an avocado consumer you are, the higher your concern about consuming GMO foods.

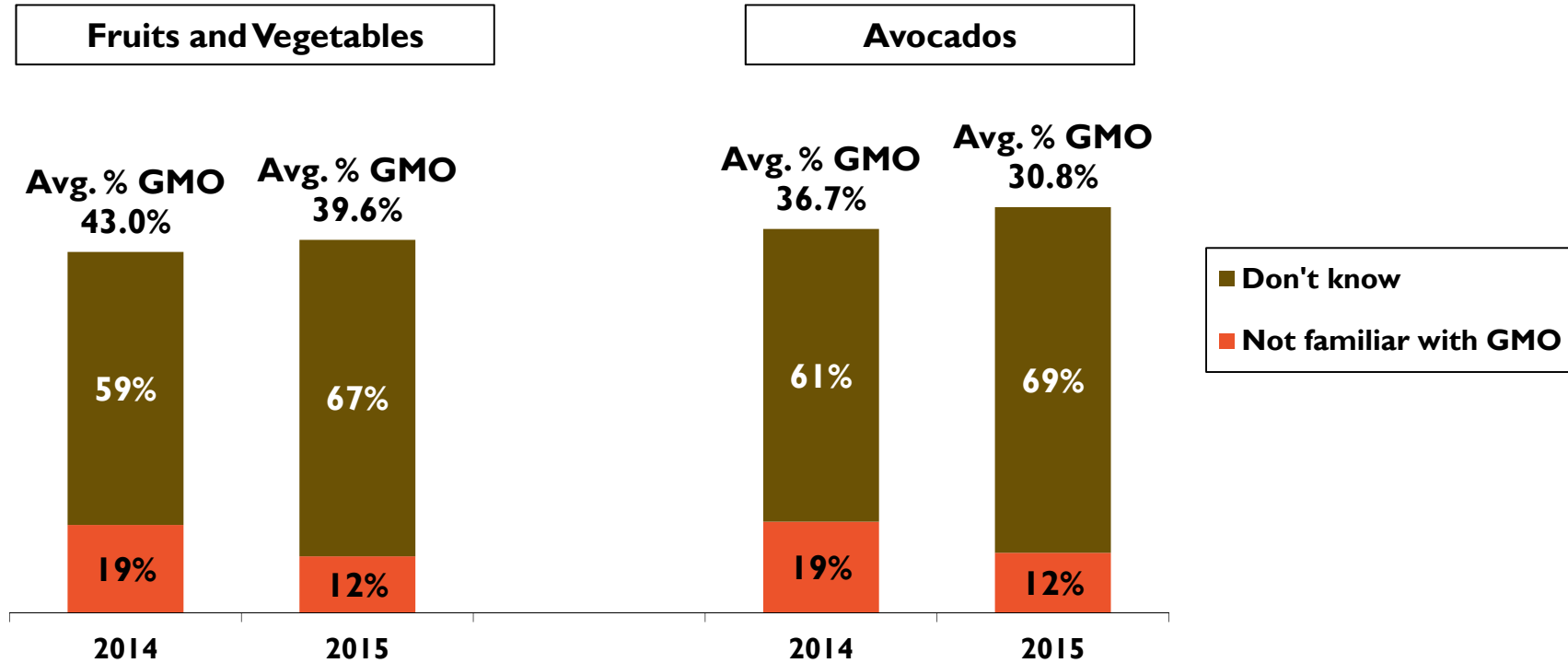




# Percentage of Fruits/Vegetables and Avocados Purchased That Are GMO or Contain GMO

Total U.S. 2015

- Most users continue not to know the percent of foods or avocados that they purchase that are GMO. Those who do know estimate that less avocados are GMO than they estimate for fruits and vegetables in general.

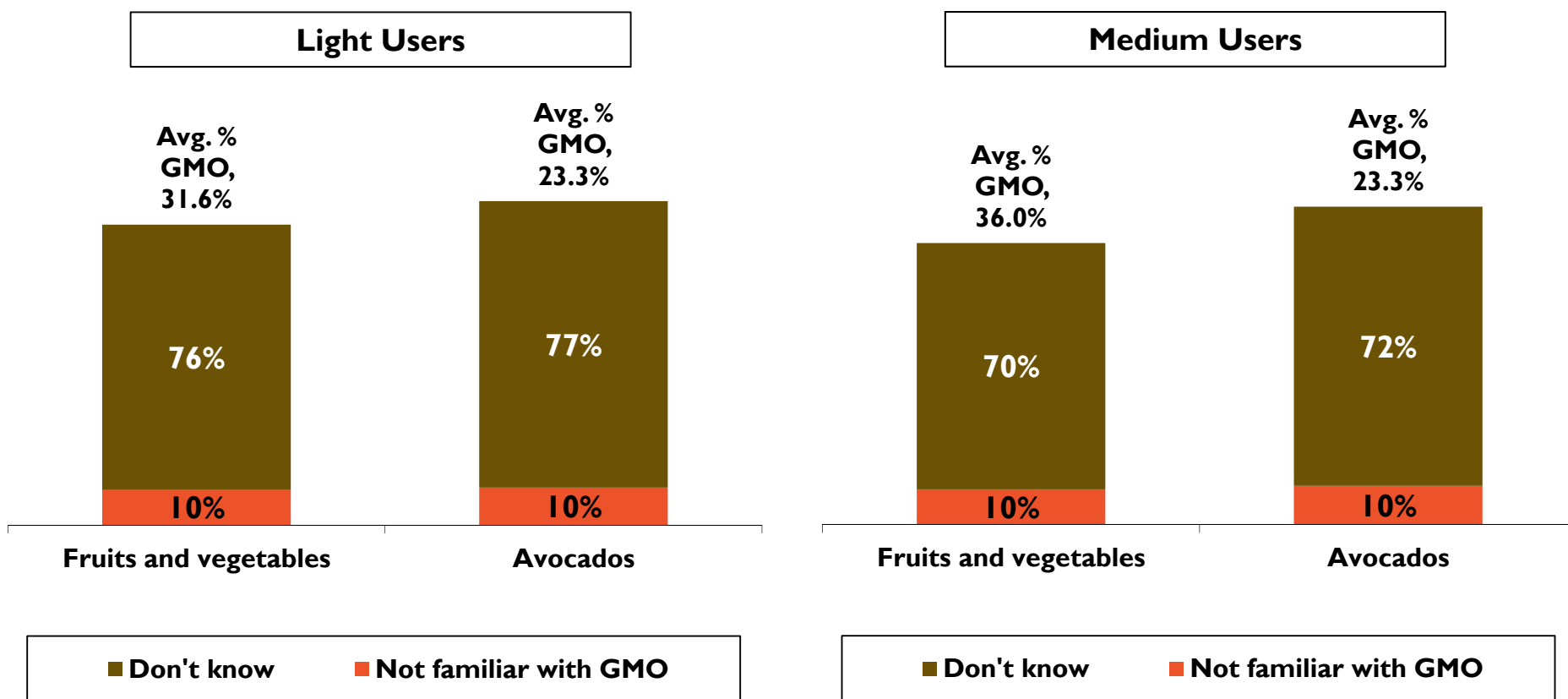


Q1111 – Thinking about the fresh fruit and vegetables that you purchase in the stores where you regularly shop, what percentage of this produce is GMO or contains GMO ingredients?  
 Q1112 – Thinking about the fresh avocados that you purchase in the stores where you regularly shop, what percentage of these avocados are GMO or contain GMO ingredients?

# Percentage of Fruits/Vegetables and Avocados Purchased That Are GMO or Contain GMO

Light and Medium Users 2015

- As seen overall, most Light and Medium users don't know the percent of foods or avocados that they purchase are GMO.

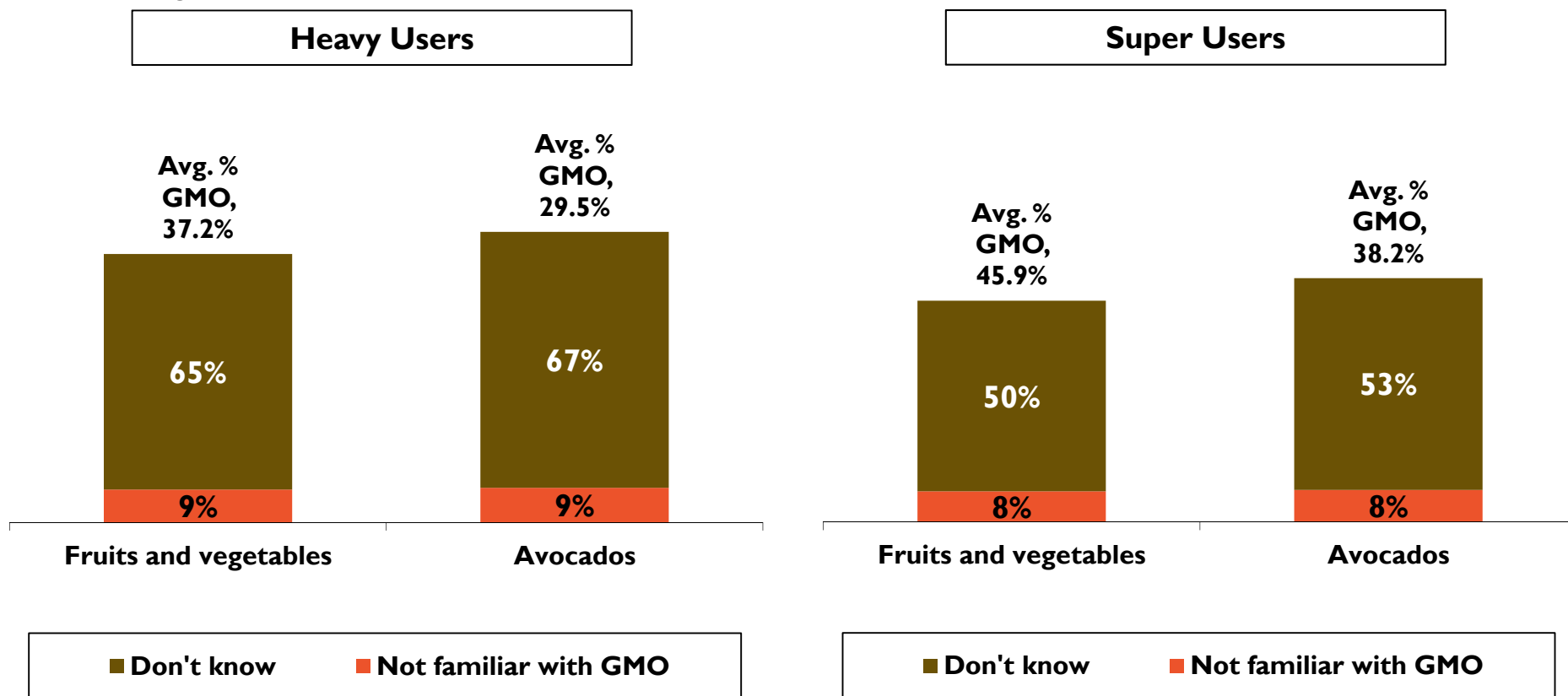


Q1111 – Thinking about the fresh fruit and vegetables that you purchase in the stores where you regularly shop, what percentage of this produce is GMO or contains GMO ingredients?  
 Q1112 – Thinking about the fresh avocados that you purchase in the stores where you regularly shop, what percentage of these avocados are GMO or contain GMO ingredients?

# Percentage of Fruits/Vegetables and Avocados Purchased That Are GMO or Contain GMO

## Heavy and Super Users 2015

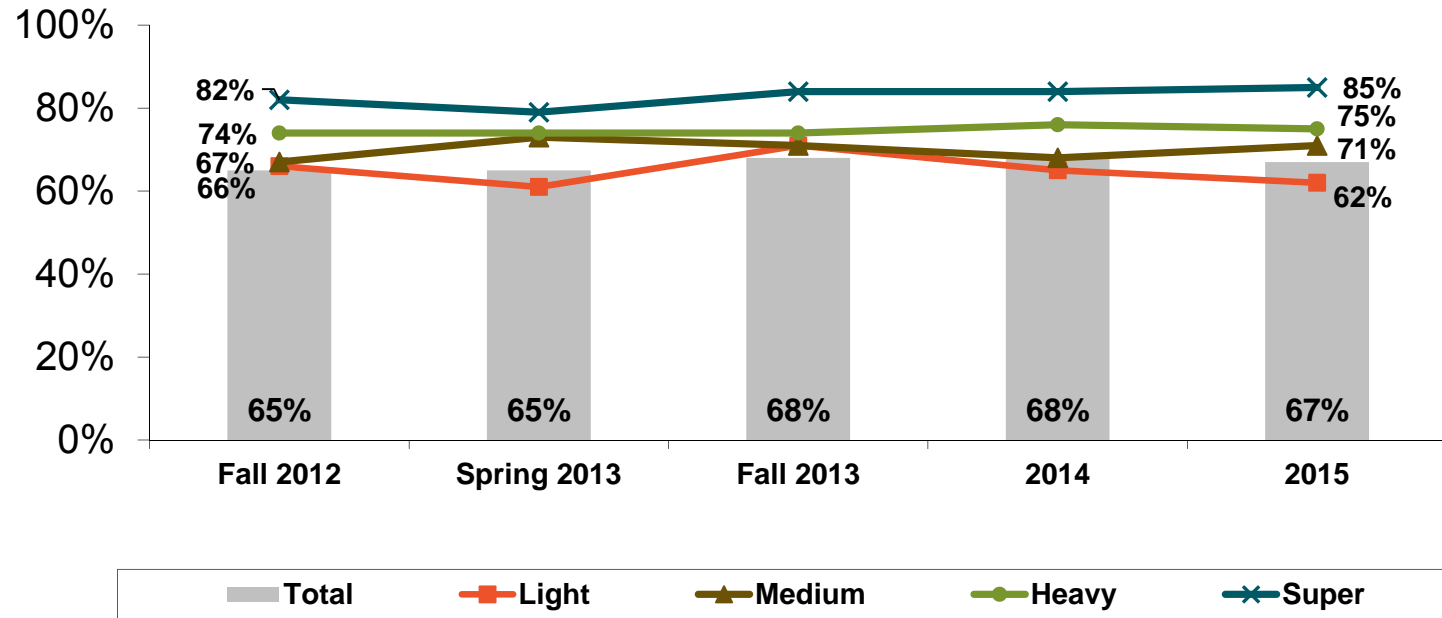
- Most Heavy users also don't know the percent of foods or avocados that they purchase are GMO. While many Super users also don't know, they are more likely to know than are any other user segments.



Q1111 – Thinking about the fresh fruit and vegetables that you purchase in the stores where you regularly shop, what percentage of this produce is GMO or contains GMO ingredients?  
 Q1112 – Thinking about the fresh avocados that you purchase in the stores where you regularly shop, what percentage of these avocados are GMO or contain GMO ingredients?

# Food and Wellness Involvement

- Super users are the most food and wellness involved. However, all other user groups are also pretty food and wellness involved.

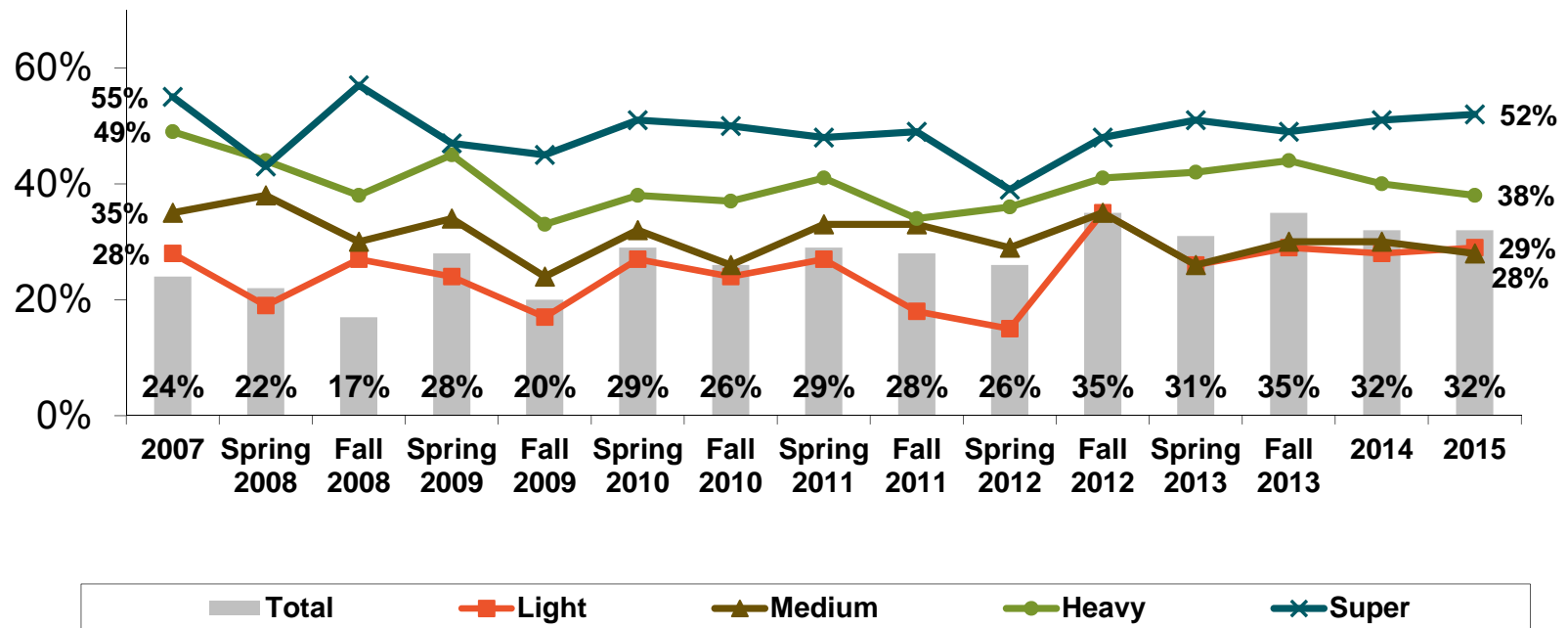




# Advertising and PR Impact

## Avocado Advertising Awareness

- Consistent with previous waves, awareness of any advertising for avocados is higher among Super and Heavy users than average.





## Sources of Avocado Advertising Awareness 2015

- The top sources of advertising awareness are the same for all groups. However, Super users are more likely than the other groups to name many of the potential media vehicles as sources of advertising awareness.

	Total US 2014 %	Total US 2015 %	Light %	Medium %	Heavy %	Super %
Television	62	70	76	67	68	69
In-Store	38	38	23	38	38	47
Magazine/News/Print	37	30	18	35	39	30
Restaurant	26	18	7	13	22	22
Internet/Web/Blogs	22	22	18	20	22	33
Radio	17	10	1	10	8	13
Subway/transit ad	12	8	1	2	10	12
Mobile device	11	5	-	1	5	11
Billboards	10	6	2	6	6	11
Gym/health club	10	4	-	1	3	10
Truck sides	10	5	2	4	4	11

## Other Avocado Information/Recipe Sources 2015

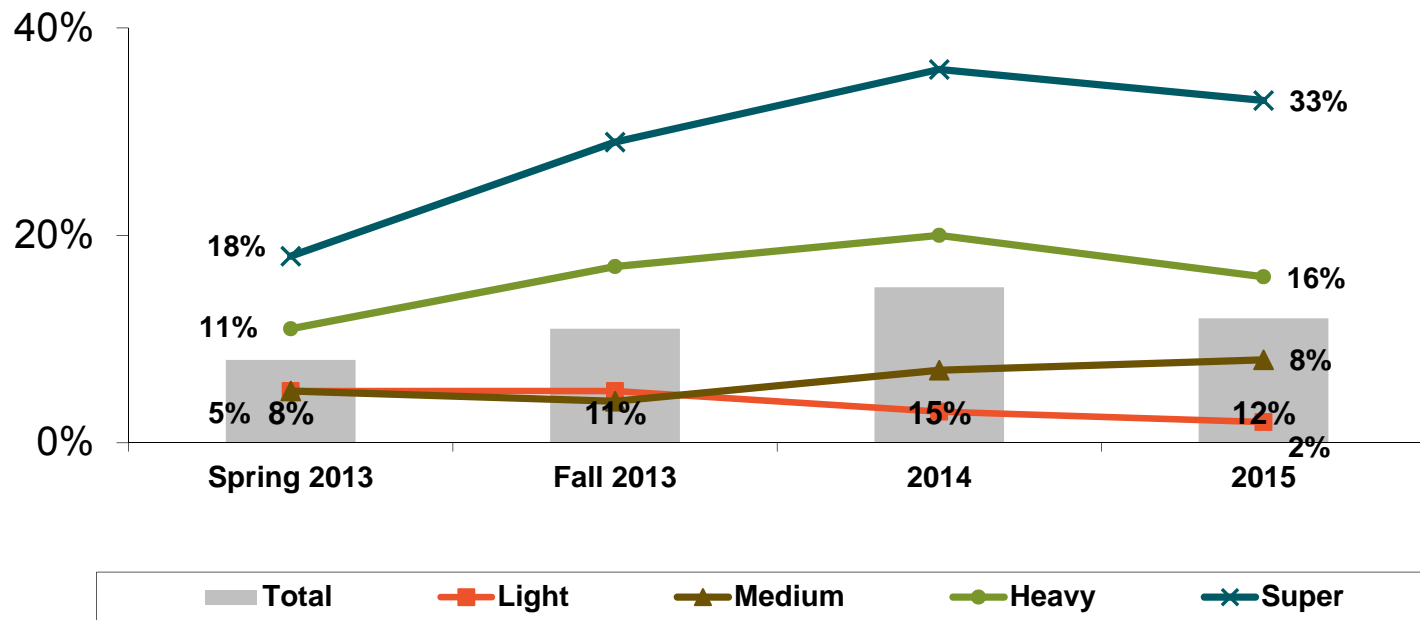
- Overall, the source of avocado advertising has not varied much from last year.
- As seen in the past, the heavier an avocado user, the more likely a person is to have seen or heard about avocados someplace besides advertising. These differences are seen for most forms of media, word-of-mouth and restaurants.

	Total US 2014 %	Total US 2015 %	Light %	Medium %	Heavy %	Super %
Grocery stores	38	35	33	39	46	44
Friends/Family	24	20	19	20	28	32
Restaurants	22	20	16	23	25	28
Television program	22	20	19	18	21	30
Magazine article	20	18	15	20	22	29
Websites/blogs	13	12	14	11	16	21
Social network sites	11	10	5	7	13	23
Newspaper article	10	7	2	6	11	13
Radio program	5	3	1	2	3	8
No place	33	37	34	33	26	18

Q1030 - Earlier we asked you where you may have see ads or commercials for avocados. Now, thinking of other sources of information about avocados, excluding ads, in which of the following places, if any, have you seen or heard information or recipes about avocados?

## Seen “Love One Today” Logo in Past Month

- Awareness of “Love One Today” continues to be up from the ghost levels of awareness seen in the Spring of 2013. However, there have been modest declines among Heavy and Super users.



Q417 – In the past month have you seen the following logo pictured in any avocados-related advertising - for example, in grocery stores, magazines, newspapers or online?



## News Articles Related to Health Benefits of Avocados Seen in Past Few Months Total U.S.

- There has been a decline in seeing or hearing news articles about the health benefits of avocados since last year.

	U.S. Spring 2013 %	U.S. Fall 2013 %	U.S. 2014 %	U.S. 2015 %
Avocados contain naturally good fats and they are cholesterol free	NA	NA	29	25
Eating avocados is associated with a healthier diet and lower body weight.	15	17	24	19
Eating one avocado a day can improve cholesterol and triglyceride profiles and support a well-functioning heart.	14	17	21	15
Avocados can help with hunger control and weight maintenance.	10	13	20	15
Eating avocados with a hamburger may contribute to blood vessel and heart health benefits.	8	10	15	11



## News Articles Related to Health Benefits of Avocados Seen in Past Few Months 2015

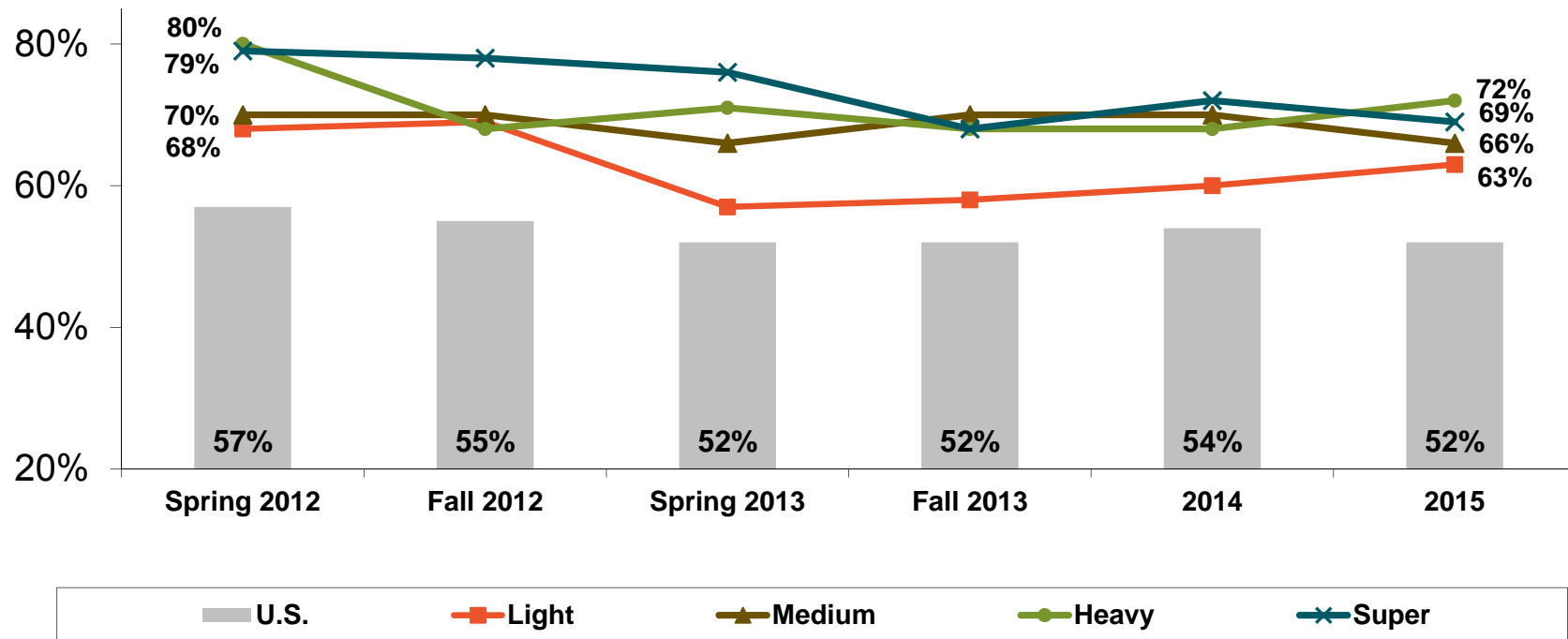
- Super and Heavy users are more likely than the other groups to claim awareness of news articles related to the health benefits of avocados.
- The declines compared to last year are occurring across all user groups.

	Light %	Medium %	Heavy %	Super %
Avocados contain naturally good fats and they are cholesterol free	19	25	35	47
Eating avocados is associated with a healthier diet and lower body weight.	14	17	25	42
Eating one avocado a day can improve cholesterol and triglyceride profiles and support a well-functioning heart.	7	11	21	40
Avocados can help with hunger control and weight maintenance.	10	11	19	34
Eating avocados with a hamburger may contribute to blood vessel and heart health benefits.	7	12	16	24

# Foodservice

# Ever Ordered Avocados When Eating Away From Home

- About one-half of users have ever ordered something made with avocados when eating away from home.
- Even a large majority of Light users order dishes with avocados while eating away from home.





## Likelihood of Ordering Healthy Menu Items in Restaurant Because it Features Avocados

- About two-thirds of respondents say they are more likely to order menu items made with avocados.
- As home avocado consumption increases, so does the likelihood of ordering dishes made with avocados.

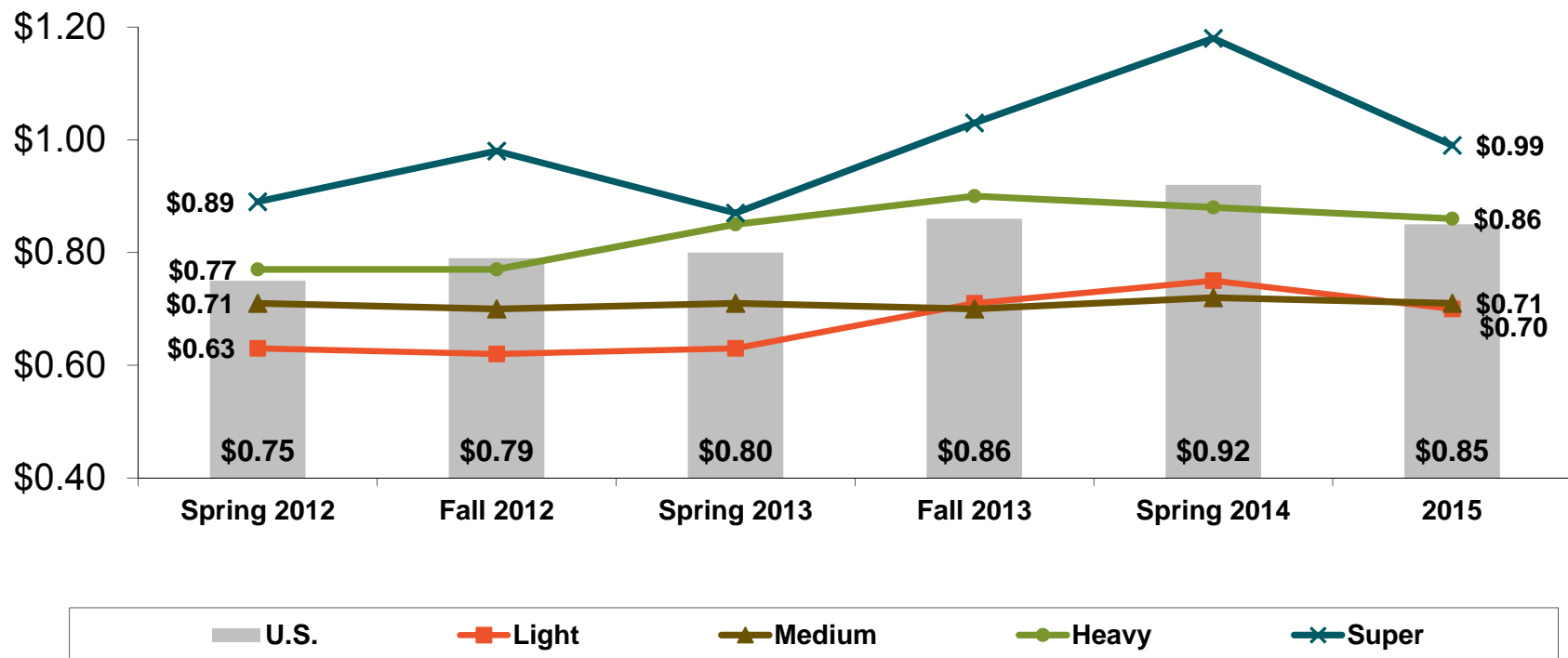
	U.S. Spring 2012 %	U.S. Fall 2012 %	U.S. Spring 2013 %	U.S. Fall 2013 %	U.S. 2014 %	U.S. 2015 %	Light %	Medium %	Heavy %	Super %
<b>More likely (Net)</b>	<b>61</b>	<b>63</b>	<b>62</b>	<b>65</b>	<b>67</b>	<b>64</b>	<b>46</b>	<b>61</b>	<b>71</b>	<b>85</b>
Much more likely	22	27	22	26	28	28	6	19	31	53
Somewhat more likely	39	36	40	38	38	37	40	42	41	32
<b>Neither more or less likely</b>	<b>33</b>	<b>32</b>	<b>33</b>	<b>31</b>	<b>28</b>	<b>32</b>	<b>49</b>	<b>37</b>	<b>25</b>	<b>13</b>
<b>Less likely (Net)</b>	<b>6</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>4</b>	<b>5</b>	<b>2</b>	<b>4</b>	<b>3</b>
Somewhat less likely	3	4	3	2	2	2	-	1	1	2
Much less likely	4	2	2	3	3	2	5	1	3	1

Q556 - How much more or less likely are you to order menu items in a restaurant that feature avocados either as a key ingredient or as part of a side dish?



# Average Price of Avocado Add-on For a Sandwich or Hamburger

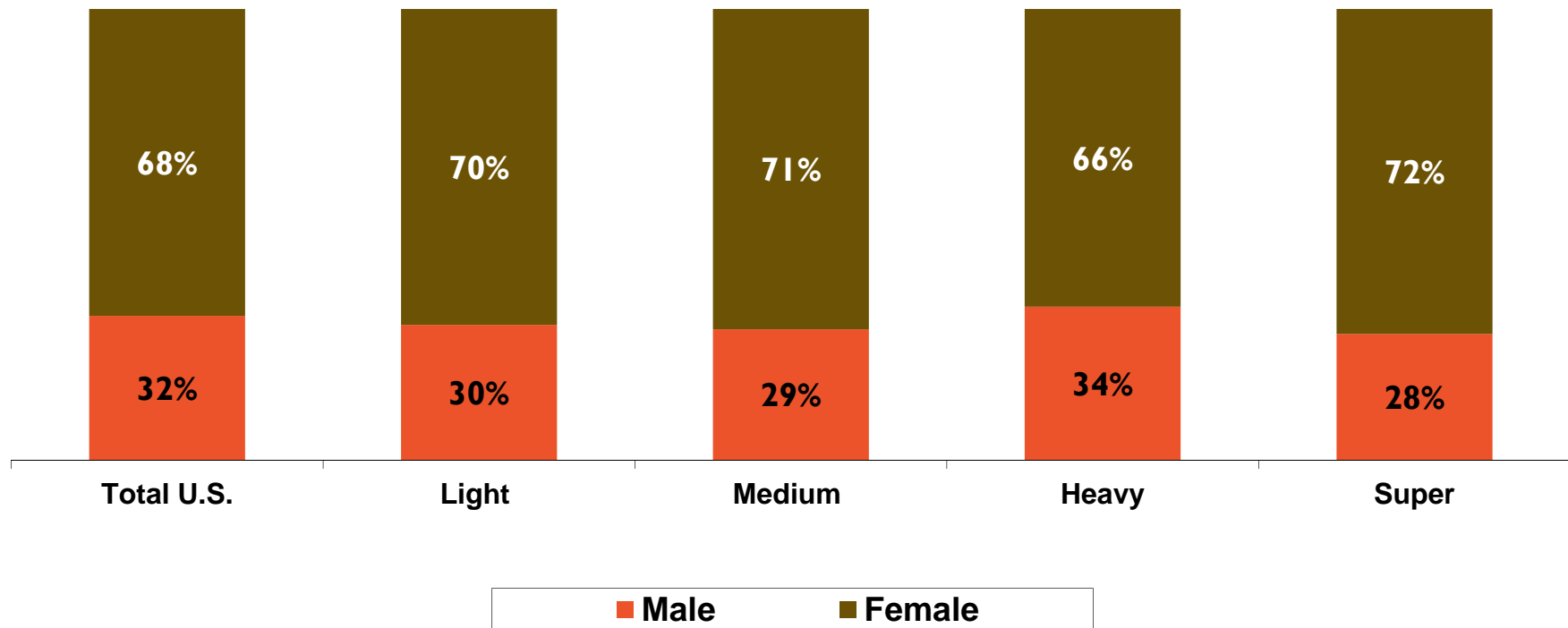
- Users are generally willing to spend 85¢ extra in a restaurant to add avocados to a sandwich or hamburger. Super users are willing to pay the most.



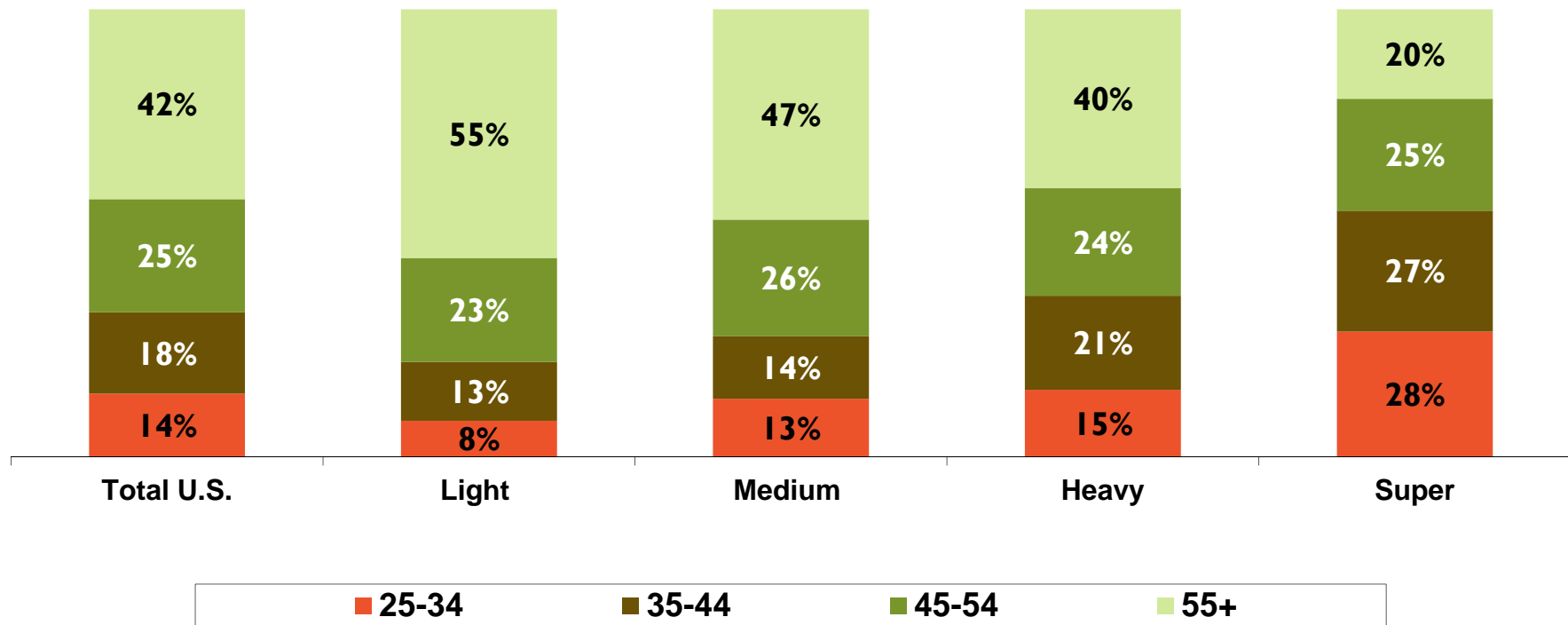
# Demographic Profile

## Gender 2015

- As seen in the past, there is only slight variation in the gender mix across user groups.



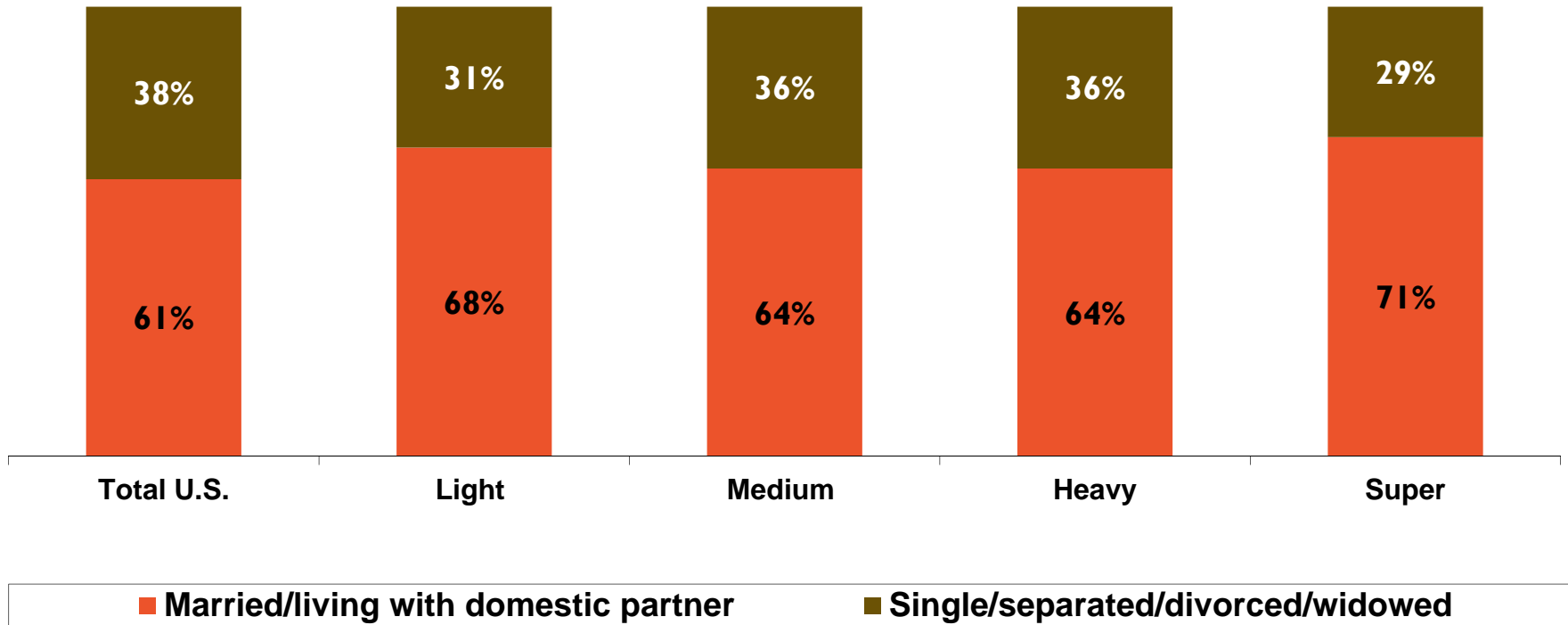
- Super users continue to have a strong skew toward younger users. Most of this difference is at the cost of the oldest user group. This older group generally spends less on groceries overall, partially driven by empty nesters.



Q305 - To ensure we are reaching people in all age groups, please indicate into which of the following age ranges you fall?

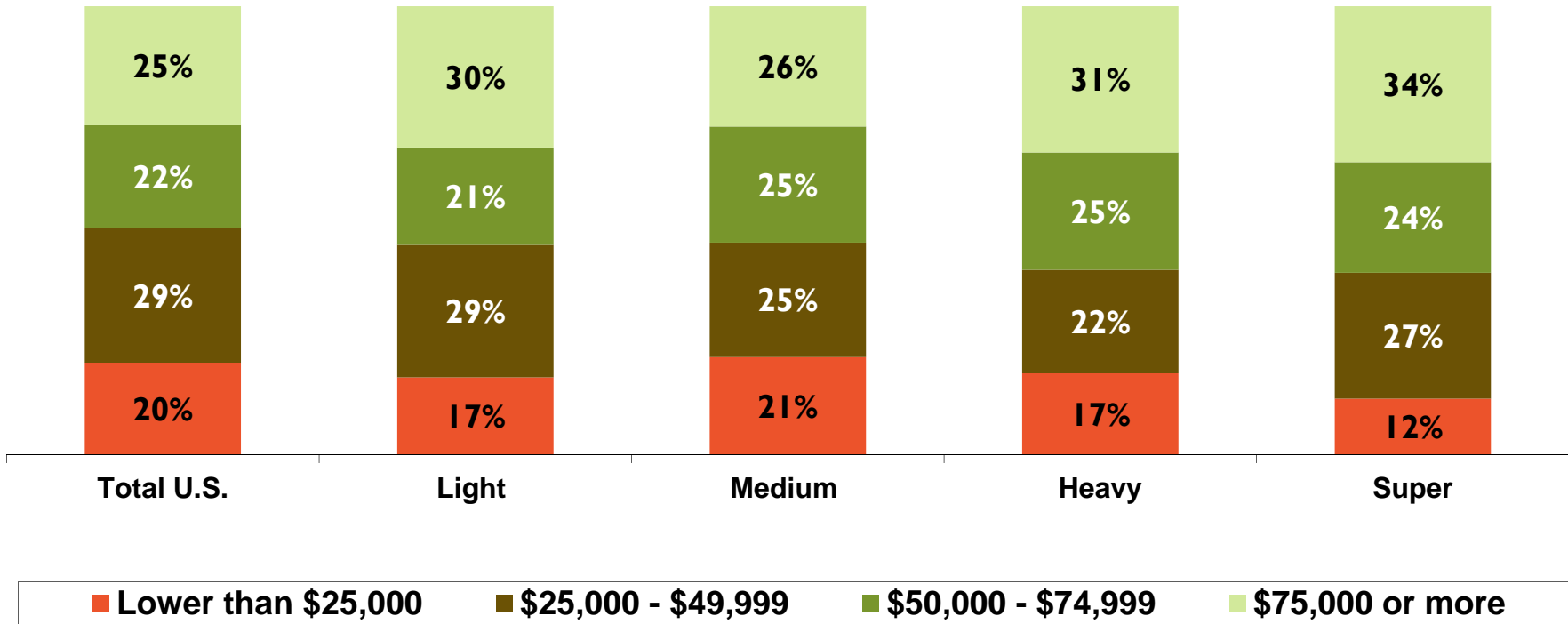
## Marital Status 2015

- Marital status continues to vary somewhat across user groups. This wave, Light and Super users are most likely to be married.



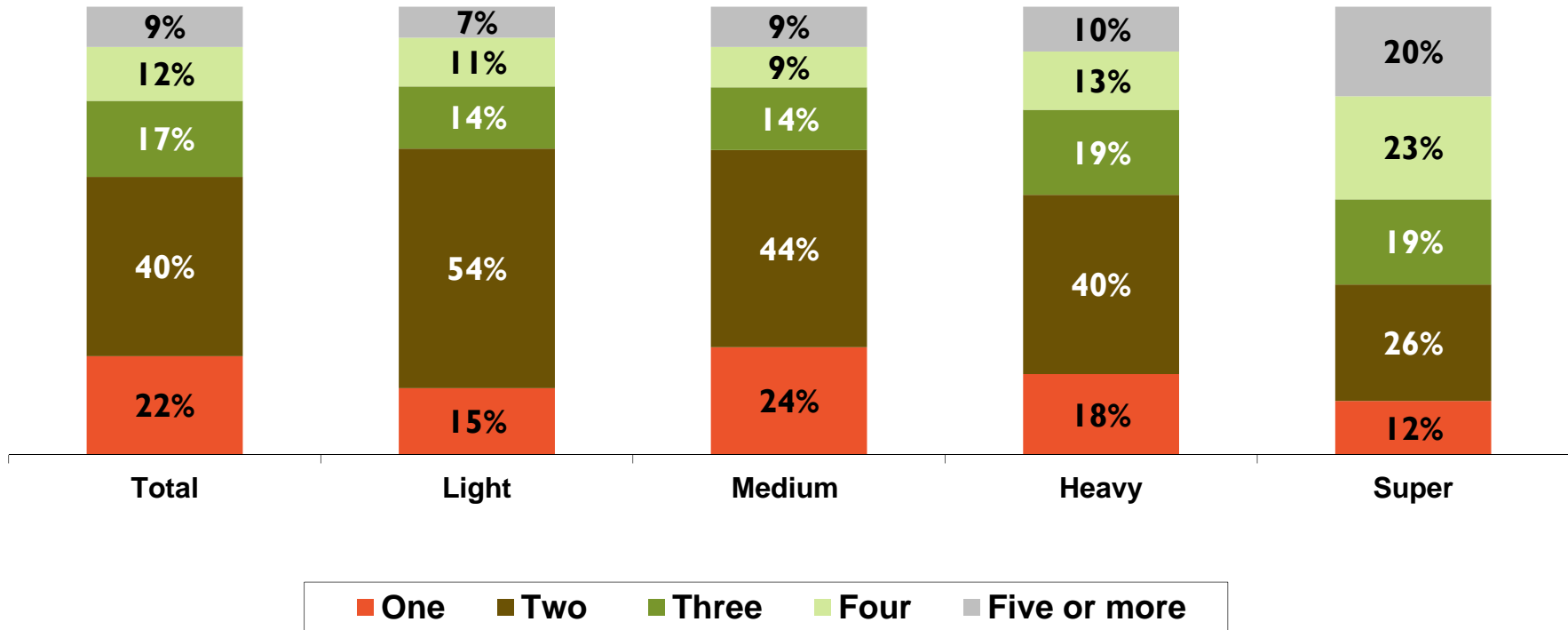
# Household Income 2015

- Super users continue to skew toward higher income households.



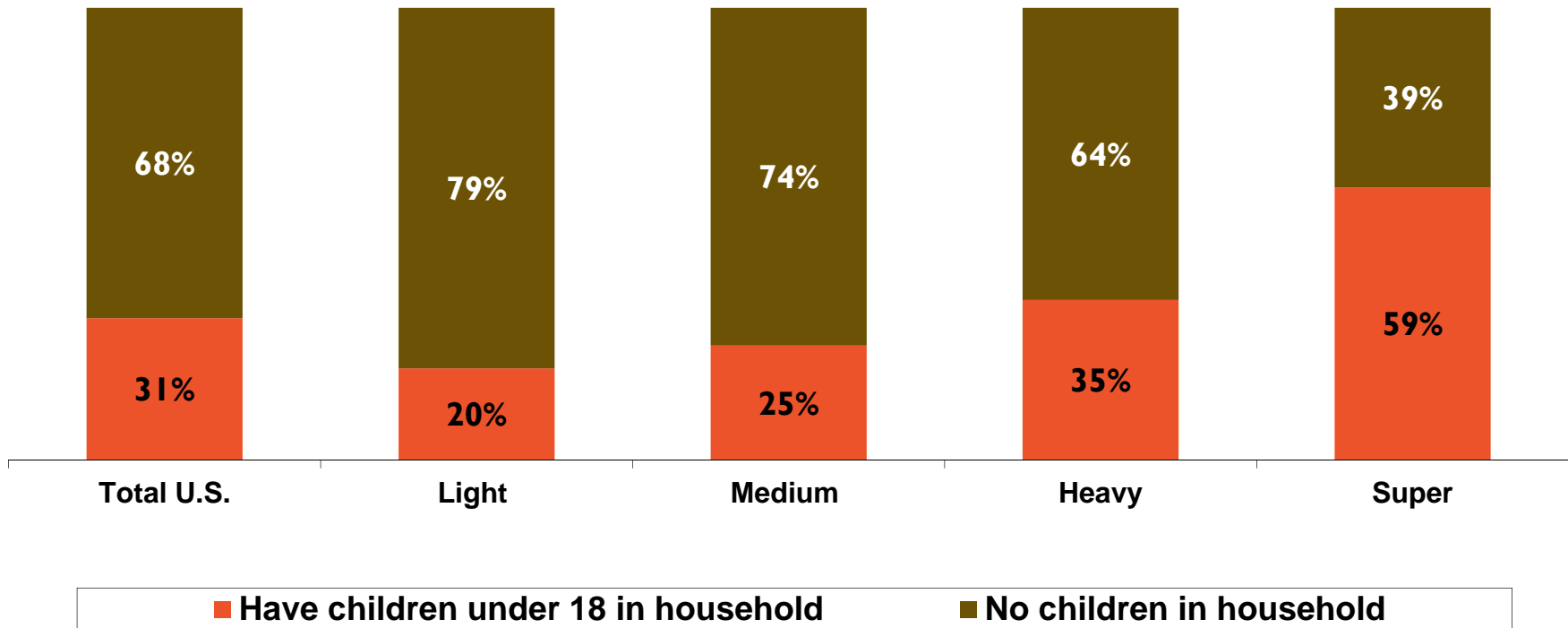
## Household Size 2015

- There is a natural correlation with household size and the number of avocados consumed.



## Children in Household 2015

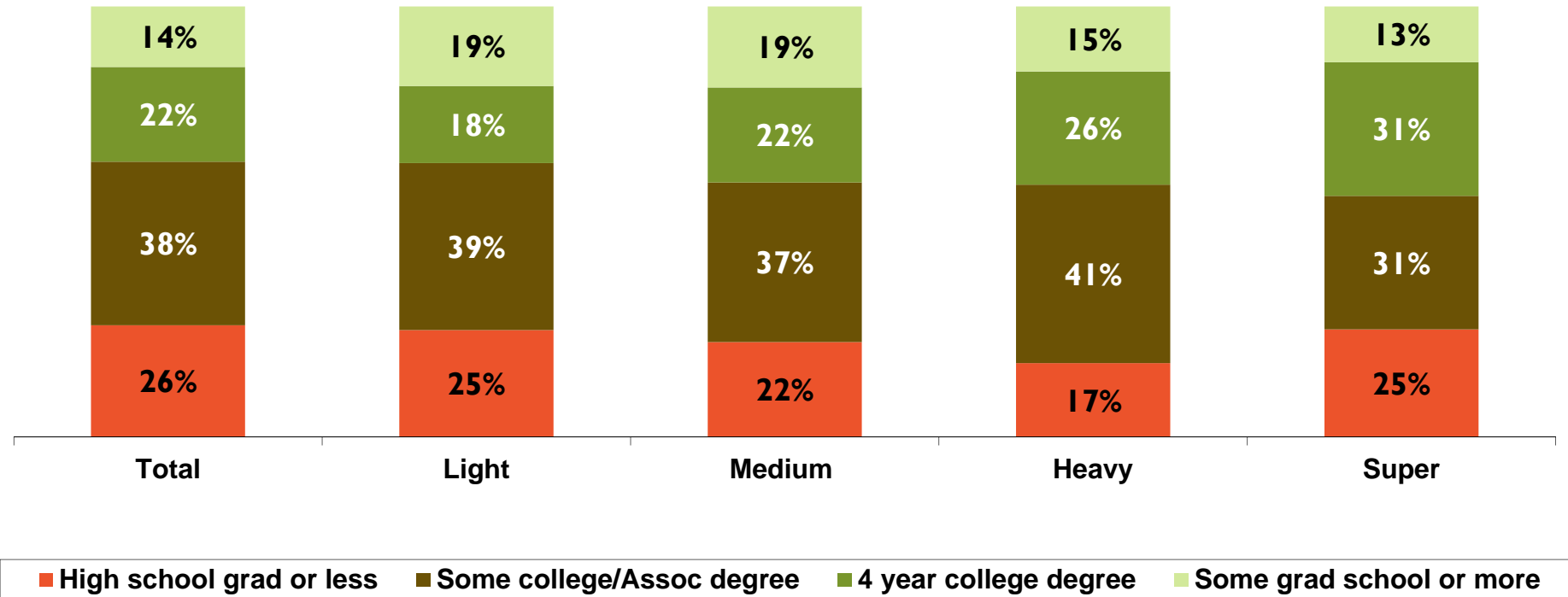
- Super users are more likely than all other groups to have children in their household.





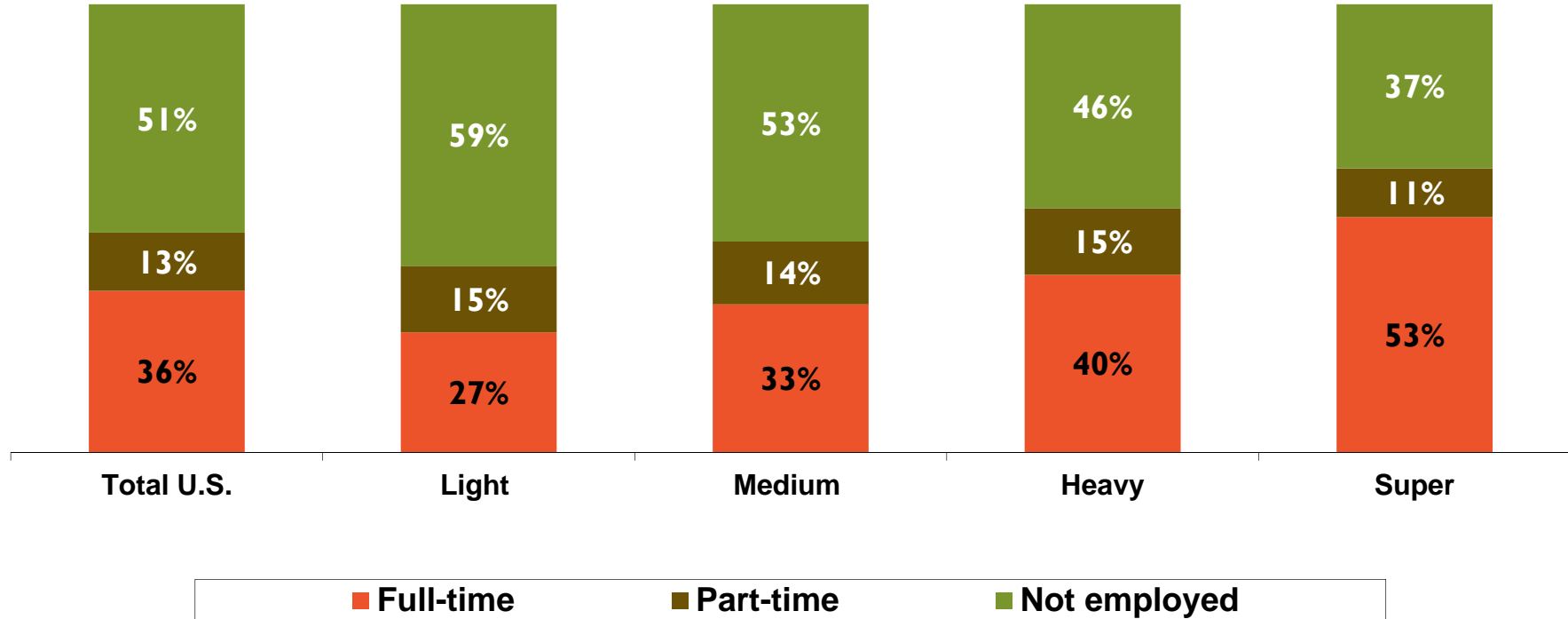
# Education 2015

- Super users have typically been more highly educated than all other users. There is less variance this year than seen in the past.



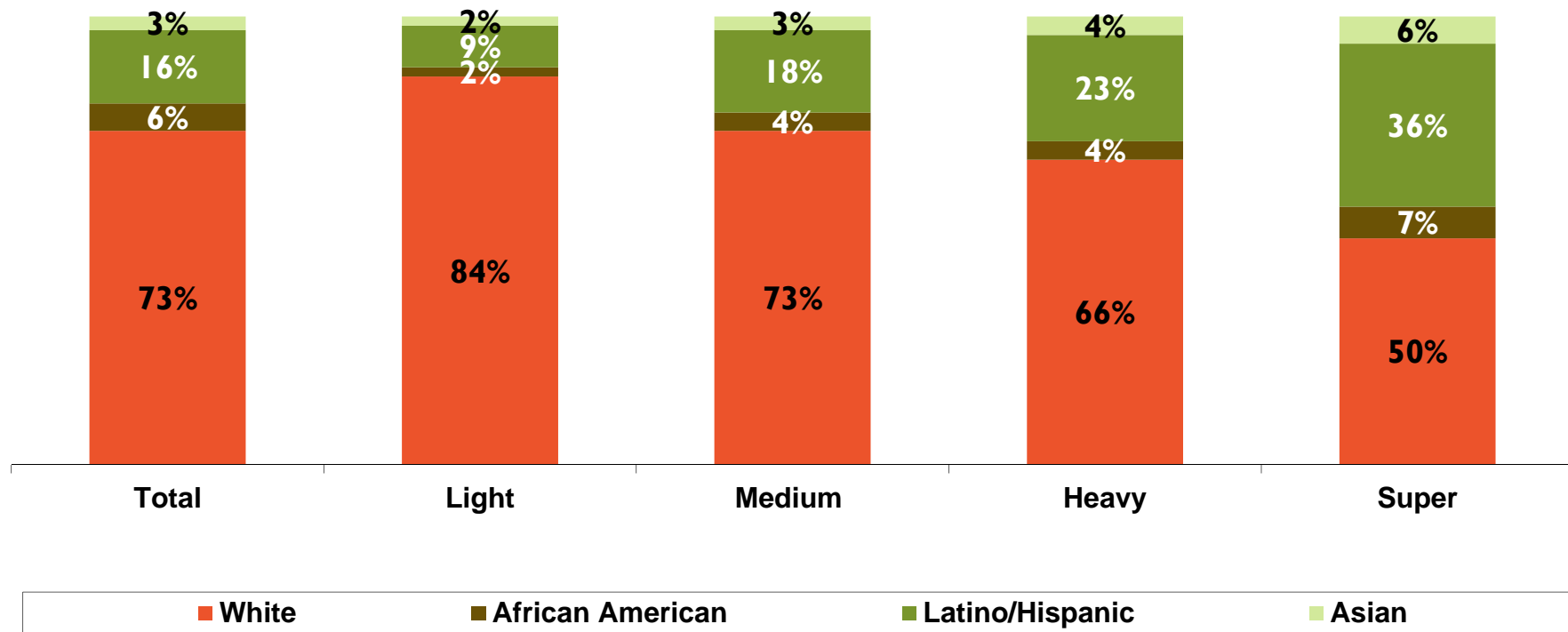
## Employment Status 2015

- Heavy and especially Super users are more likely to be employed full time than the other groups.



## Ethnicity 2015

- Consistent with their representation in the population, the majority of avocado users are Caucasian.
- Heavy/Super users have a higher propensity than Light and Medium users to be of Hispanic origin (reminder: this study only included English speaking Hispanics).



Q236 - Are you of Hispanic origin, such as Latin American, Mexican, Puerto Rican, or Cuban?  
 Q238 - Do you consider yourself?

## Born in U.S. or Moved from Another Country 2015

- While most avocado users were born in the U.S., Heavy and Super users do have a skew toward being born outside the U.S.

