

Avocado Tracking Study

2016 Target Audience Analysis

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The logo for Cooper Roberts Research consists of four small circles in a horizontal row. From left to right, the colors are light blue, light blue, yellow, and light blue.

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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 target versus non-target audience consumers 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 avocado user groups
 - Regional report cards

Background (Contd.)

- Target audience consumers are defined as follows:
 - Prepare home cooked meals a few times per week or more often;
 - Strongly or somewhat agree with the following two statements:
 - I put a lot of time and effort into preparing healthy homemade meals
 - I like to cook homemade meals because I can control the ingredients
 - Buy 37 or more avocados per year (Heavy or Super User).
- The target audience segmentation has been completed at the total U.S. level among avocado consumers 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 8 to April 22, 2016.
- Spring waves have generally been completed in February/March/April and Fall waves have been completed in late summer or early Fall. The Fall waves were discontinued after 2013.

- **Who**

- 2,408 grocery shoppers age 25+
- Note: 2007/2008 was restricted to age 25-54

- **How**

- Self-administered web based survey

Summary

Target Audience

- One-third of all respondents fall into the target audience, defined as food and wellness involved and being heavy or super avocado consumers. This has increased slowly over time.
 - The average target audience respondent purchases 119 avocados per year (up from 112 last year), compared to 36 avocados among non-target respondents (which also includes non-avocado purchasers).

Drivers and Barriers to Avocado Consumption

- Target audience respondents continue to embrace all of the reasons for purchasing avocados to a stronger degree than seen among non-target respondents.
 - While some of these reasons have remained fairly consistent over time among the target audience, there have also been numerous improvements:
 - “Variety of uses” increased over time from 81% to 86%.
 - “Being good for you” increased over time from 86% to 91%.
 - “Being organically grown” increased over time from 48% to 60%.
 - “Can be substituted” increased over time from 56% to 63%.
 - “A staple in my household” increased over time from 71% to 76%.
 - “Buy them for my baby/younger children” increased over time from 17% to 38%.
 - “The amount of calories” increased over time from 45% to 54%.
- In recent years, similar proportions of target audience and non-target audience respondents have decided not to purchase avocados due to the price, but this year target audience respondents expressed more price resistance (64% of target and 57% of non-target named price as a barrier). The price barrier is the same for both groups (~ \$1.95).
 - At the same time, price is infrequently a barrier to purchase for either group.
 - Fat content, while a relatively small barrier overall, did increase among non-target respondents (17% up to 22%).

Summary

Nutrition and Wellness

- As seen in previous years, target audience respondents place more importance on all of the nutritional and health & wellness benefits than do non-target respondents.
 - They also remain more likely to associate avocados with these benefits.
 - Over time, association of avocados with various nutritional benefits has fluctuated among the target audience. While still strong, scores did decrease for several benefits in 2015. Most of them saw a rebound in 2016, but some remain lower. This includes:
 - Contain lutein
 - Contain folate
 - High in calories (a lower association is a good thing)
 - Association of avocados with the following health benefits has increased over time:
 - Healthy aging
 - Healthy weight maintenance/management and weight loss
 - Cognitive skills, brain health and mental function
 - Diabetes management/blood sugar and blood glucose
 - Child growth and development
- As seen in previous years, target audience respondents are more likely than non-target respondents to think avocados are healthier than all the other fruits, vegetables and healthy sources of fat.
- Target audience respondents remain more confident in the safety of various foods, and especially for avocados.
- Target audience respondents remain more concerned about GMO. While the majority of them do not know if avocados are GMO free or not, those who believe they do know think that about one-third of all avocados are GMO – a level similar to last year.
- Target audience respondents are much more likely to claim they are purchasing more avocados because they believe they are sustainable than seen among non-target consumers (38% vs. 8%).

Summary

Advertising and PR Impact

- Awareness of the “Love One Today” logo is significantly higher among target audience respondents than non-target respondents (27% vs. 7%). This represents a rebound from the decline seen in 2015 among target audience respondents.
 - The “love one today” logo strongly communicates that avocados are nutritious, that you should eat an avocado every day and that you should purchase avocados today.
- Target audience respondents are more likely than non-target respondents to claim awareness of news articles related to the health benefits of avocados. Awareness of such articles had decreased among the target audience in 2015. Most of those scores saw a rebound in 2016.

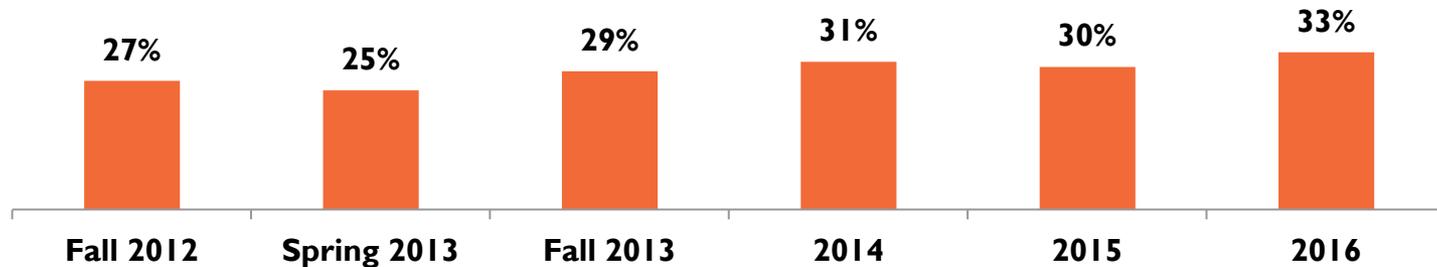
Demographics

- Target audience respondents vary from non-target respondents in terms of being:
 - Female
 - Younger
 - Married/partnered
 - Have a higher household income
 - In a larger household size and have children
 - Somewhat better educated and employed full-time
 - Of Hispanic origin (note: this study was only offered in English).

Target Audience Market Size

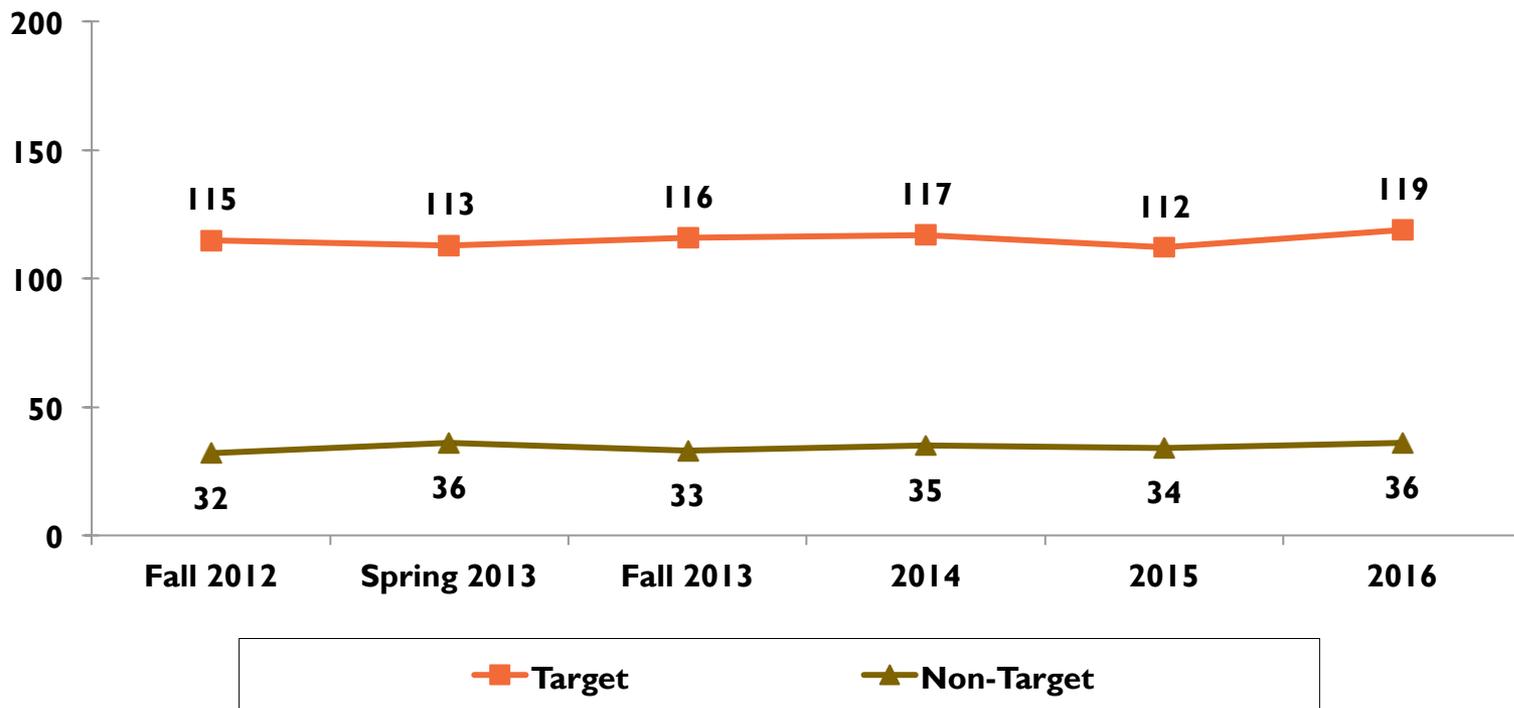
Size of Target Audience

- The size of the target audience has increased over time.



Average Number of Avocados Purchased in Past Year

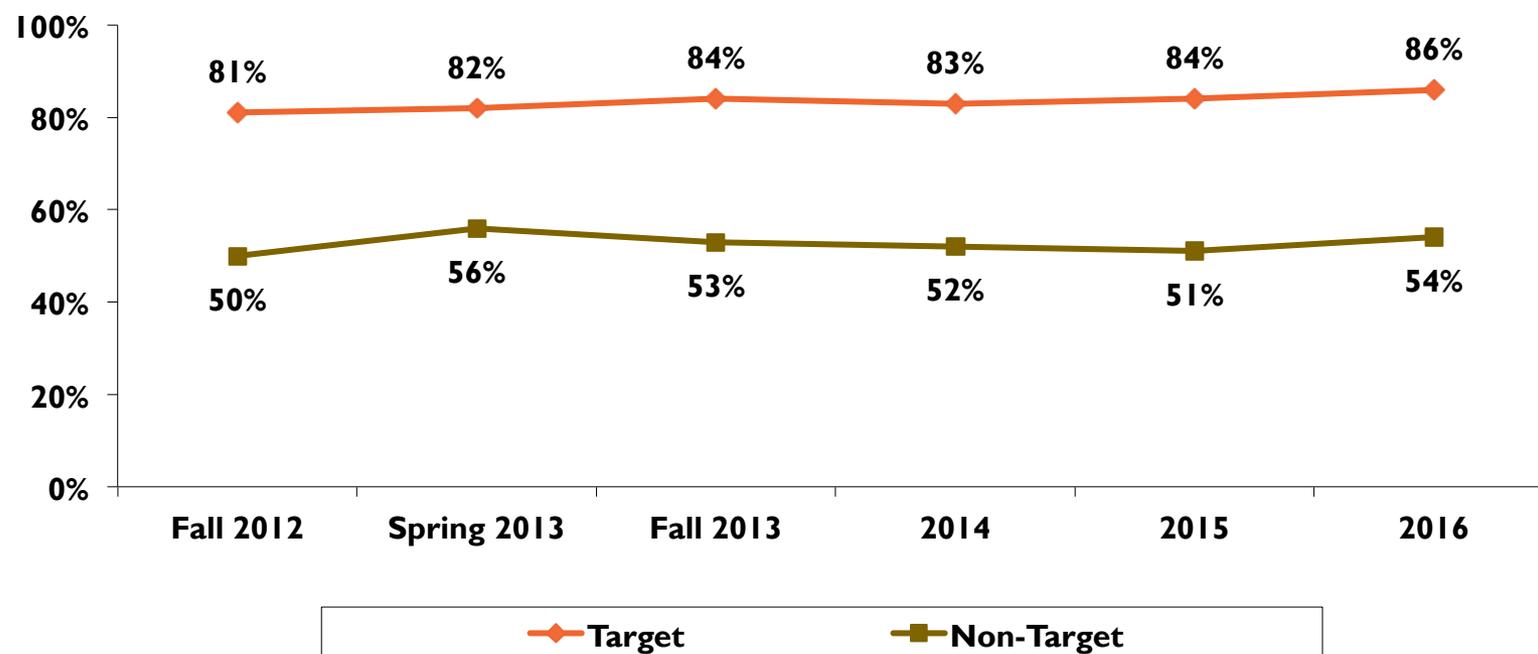
- By definition, the target audience purchases significantly more avocados per year than the non-target audience.
 - The current average for the target audience is 119 avocados per year.



Drivers and Barriers to Avocado Usage

Variety of Uses as a Reason to Purchase Avocados

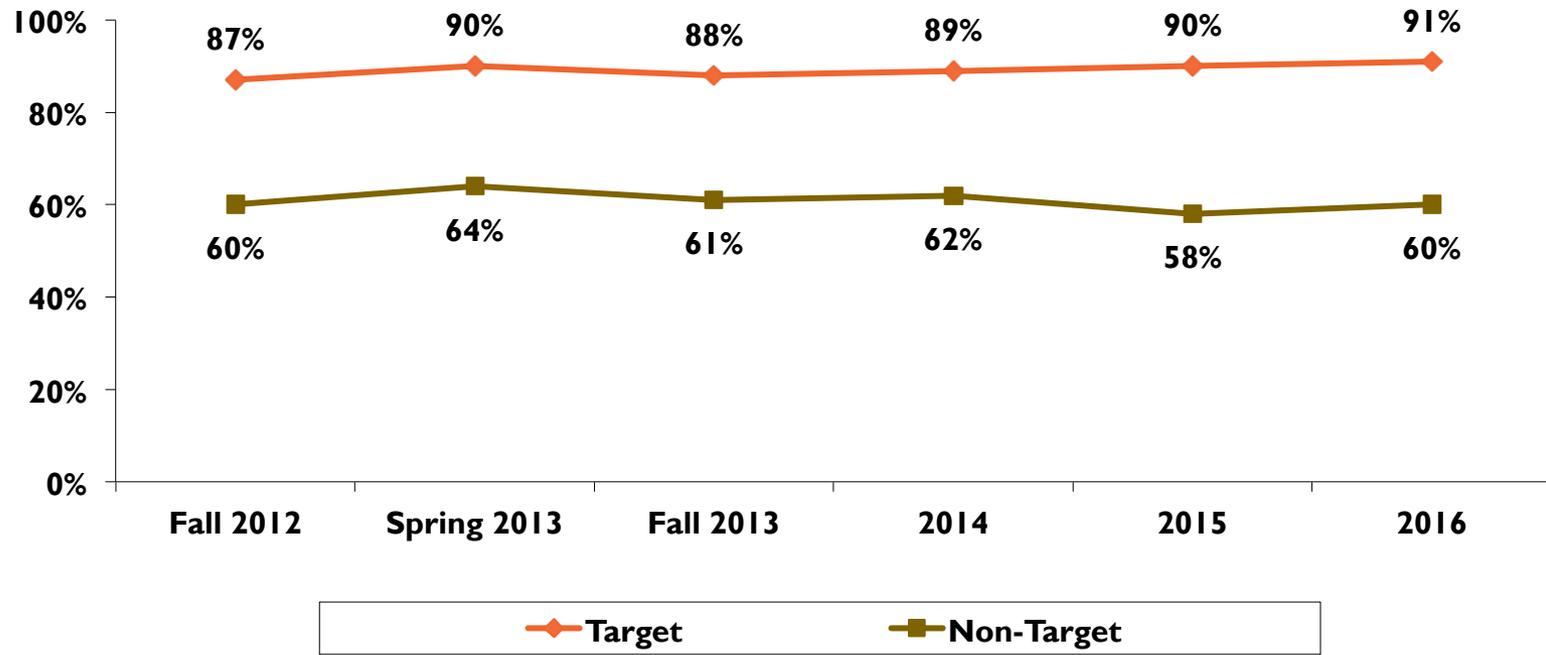
- Target audience respondents continue to be significantly more likely to claim a variety of uses as a reason to purchase avocados. In fact, this has increased over time as a purchase driver.



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.

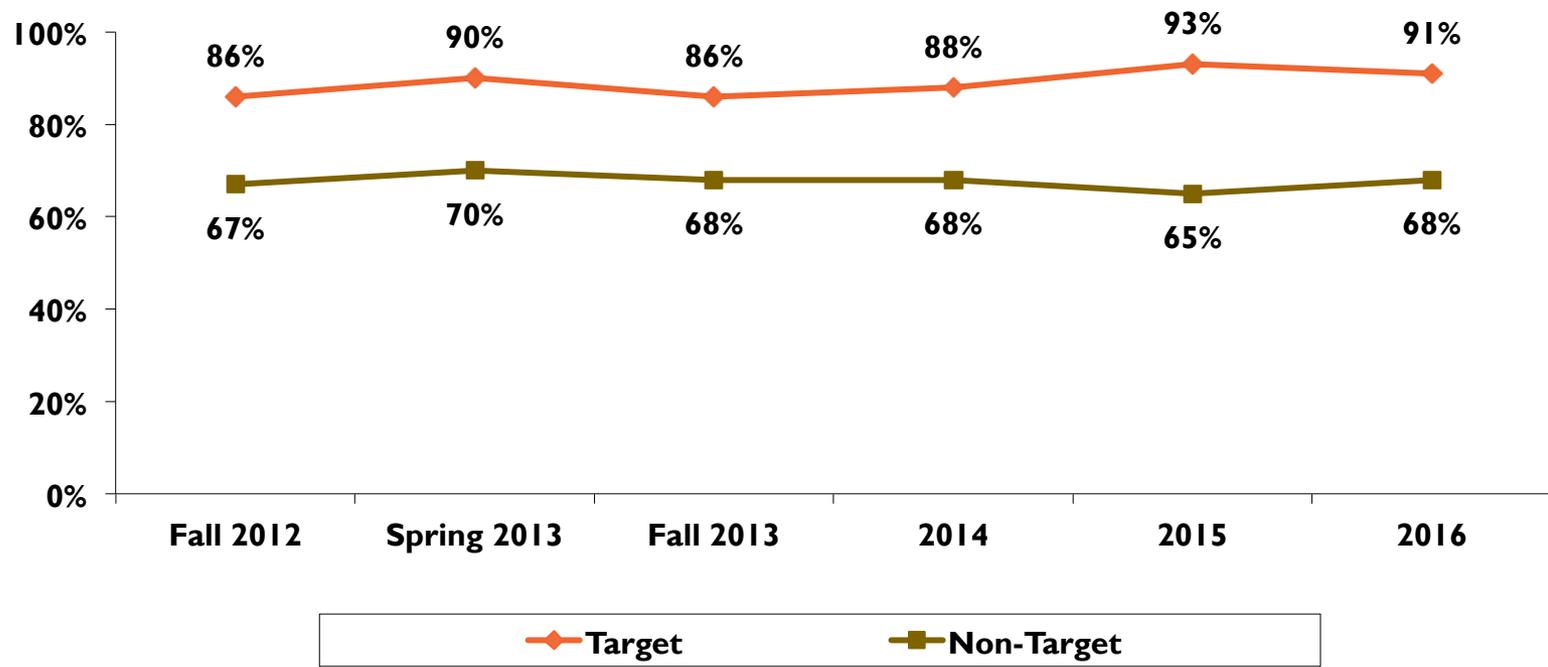
Taste as a Reason to Purchase Avocados

- Target audience respondents are also significantly more likely to continue to name taste as a reason to buy avocados.



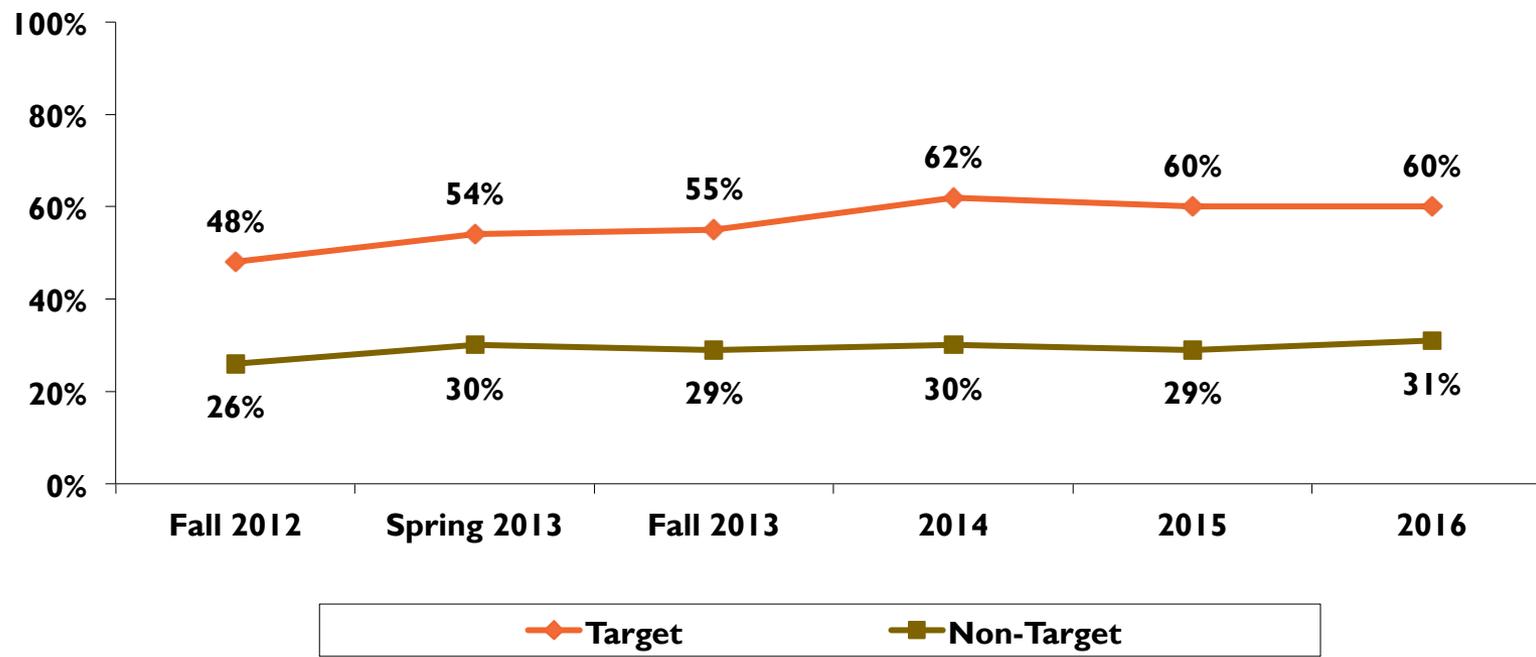
Good For You as a Reason to Purchase Avocados

- Target audience respondents also continue to be significantly more likely to name “being good for you” as a reason to purchase avocados. This score, while already high among the target audience, has grown even stronger over time.



Being Organically Grown as a Reason to Purchase Avocados

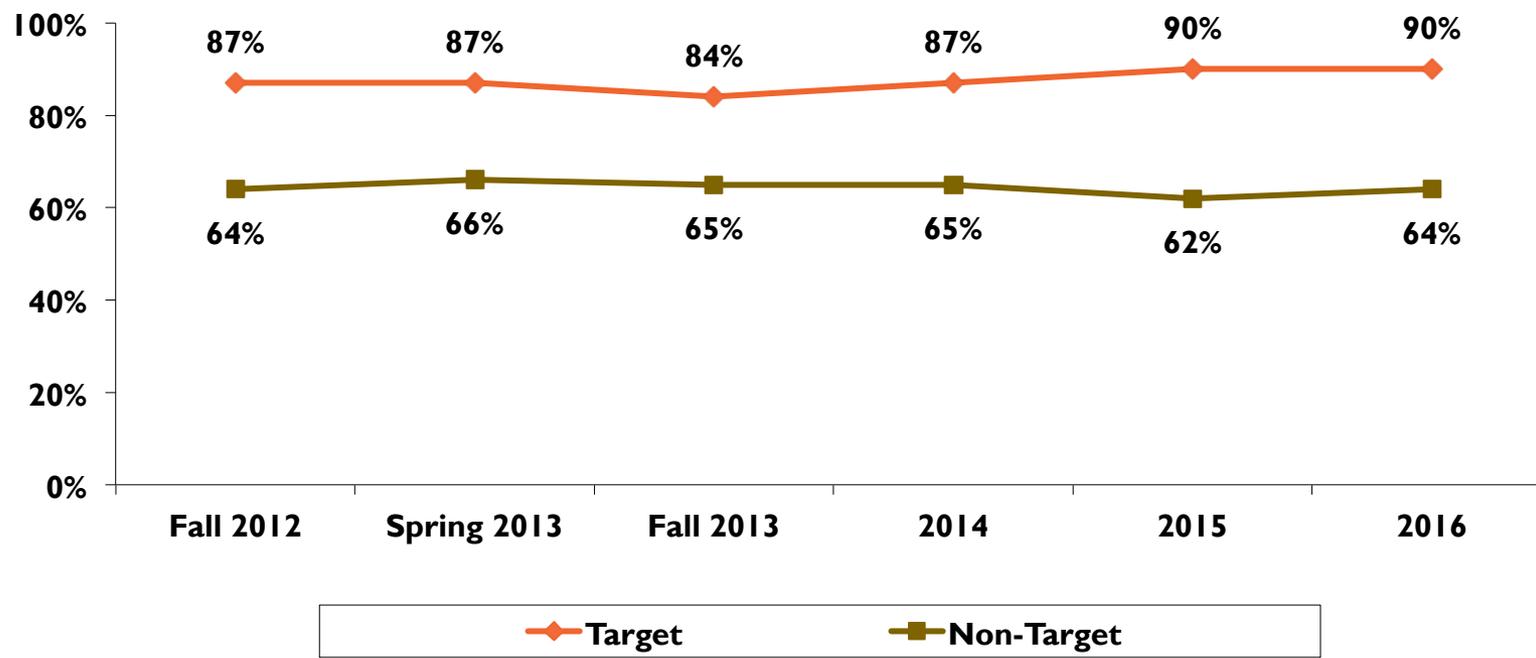
- Being organically grown is less of a purchase driver for target audience respondents than are many of the other attributes. However, they are significantly more likely than non-target respondents to state organically grown as a purchase driver. More so, organically grown has increased over time as a purchase driver.



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.

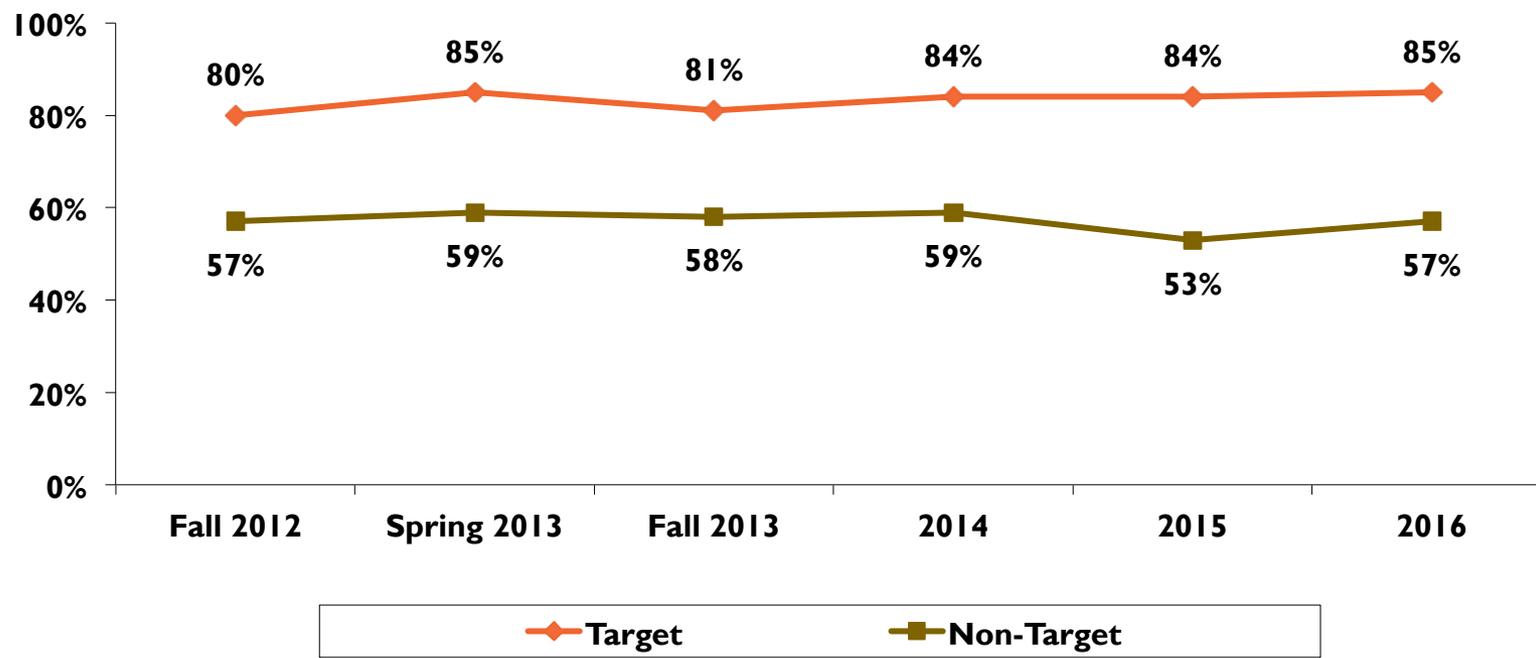
Nutritional Benefits as a Reason to Purchase Avocados

- Nutritional benefits also remain a strong purchase driver for target audience respondents. Already high among the target audience, nutritional benefits did maintain the directional increase as a purchase driver that was achieved last year.



Quality as a Reason to Purchase Avocados

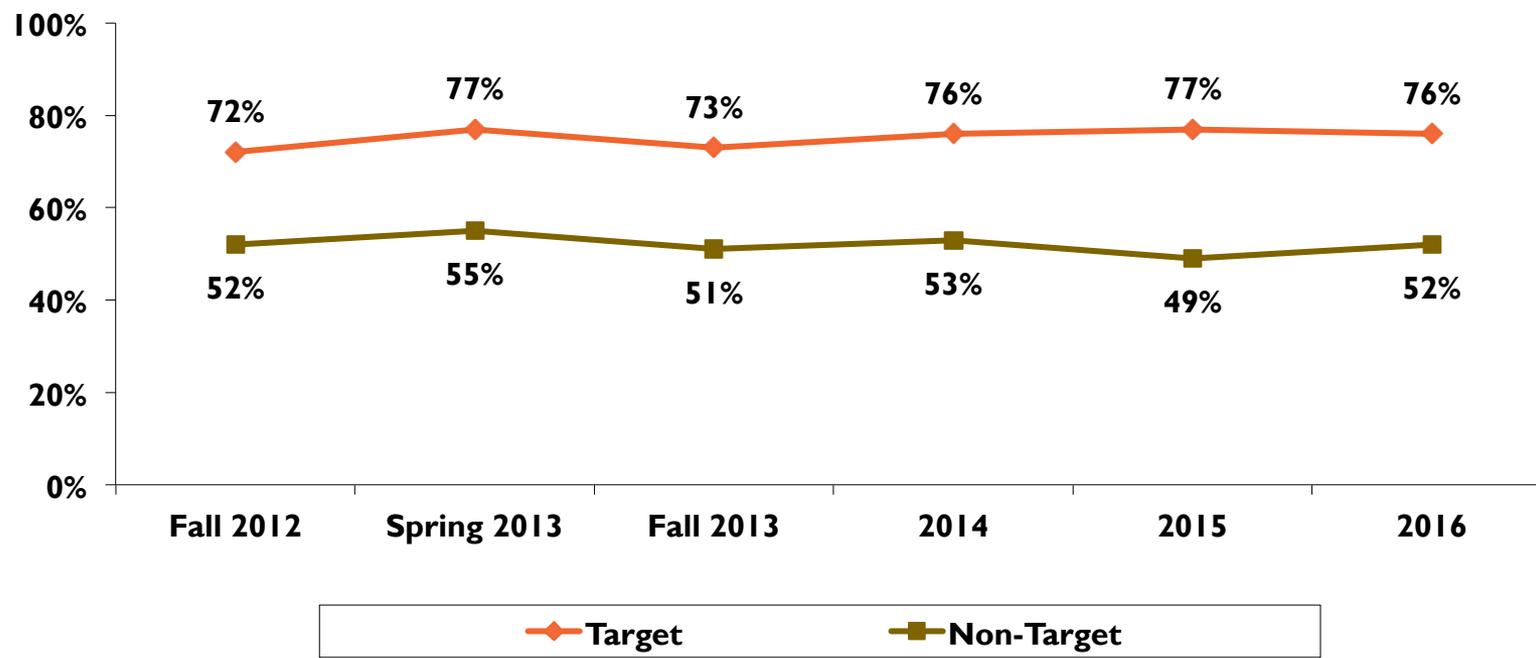
- Quality remains a strong purchase driver for target audience respondents.



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

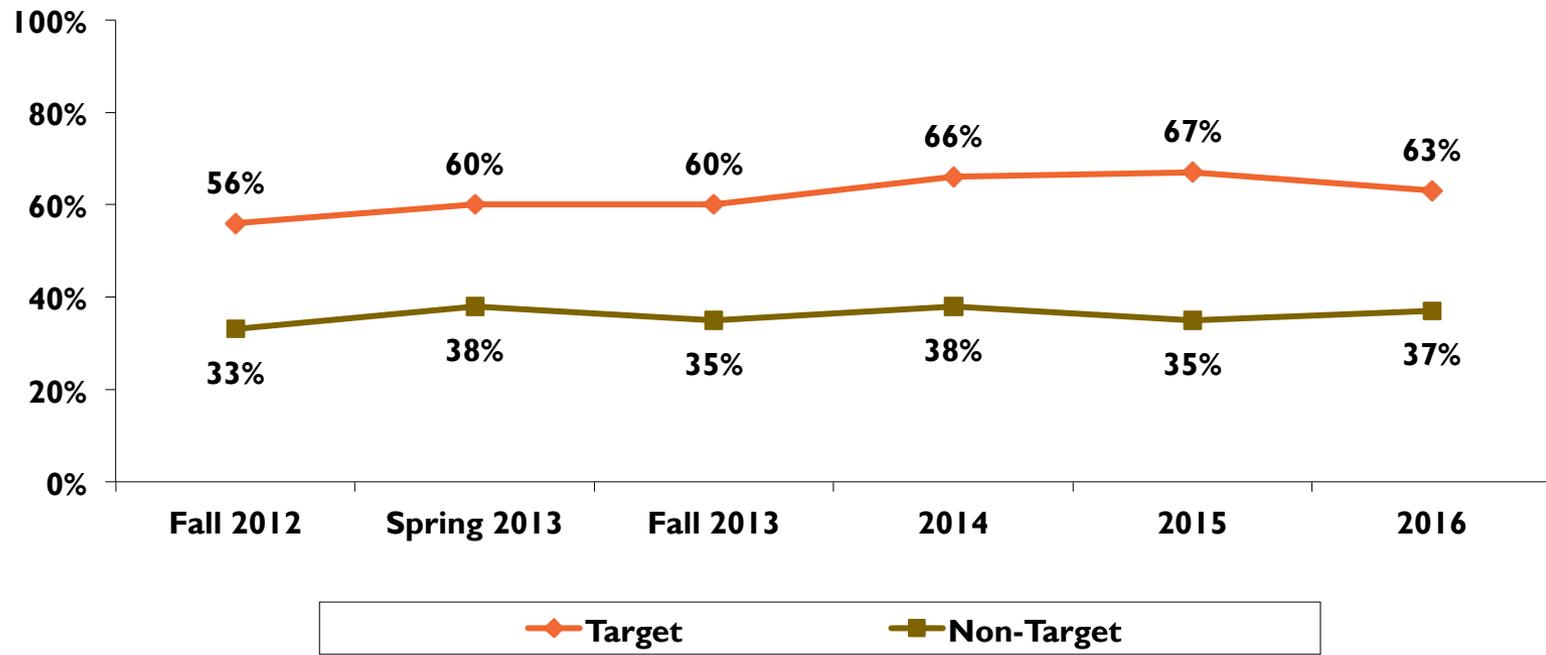
- Ripeness is also a strong purchase driver for target audience respondents.



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.

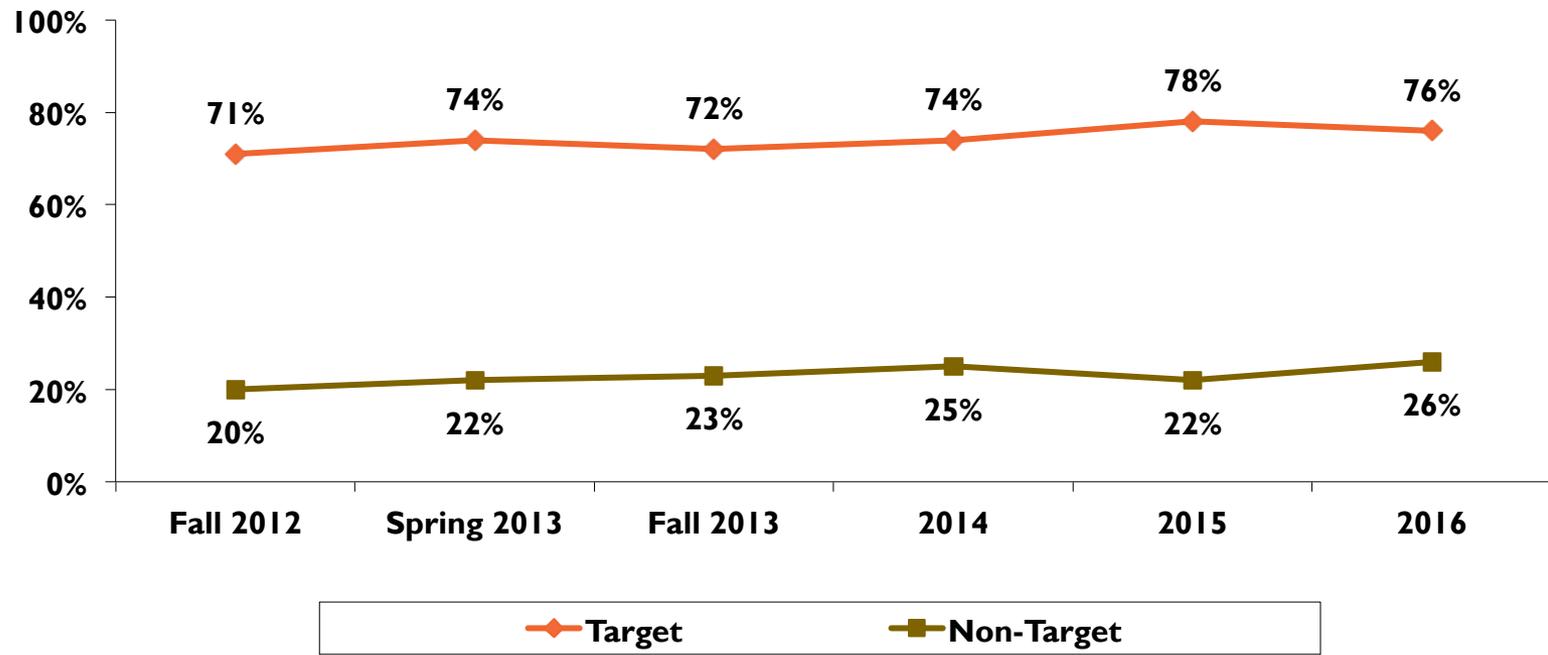
Can Be Substituted for Other Foods/Ingredients as a Reason to Purchase Avocados

- Substitution for other foods is a moderate purchase driver for target audience respondents, but it has been growing over time.



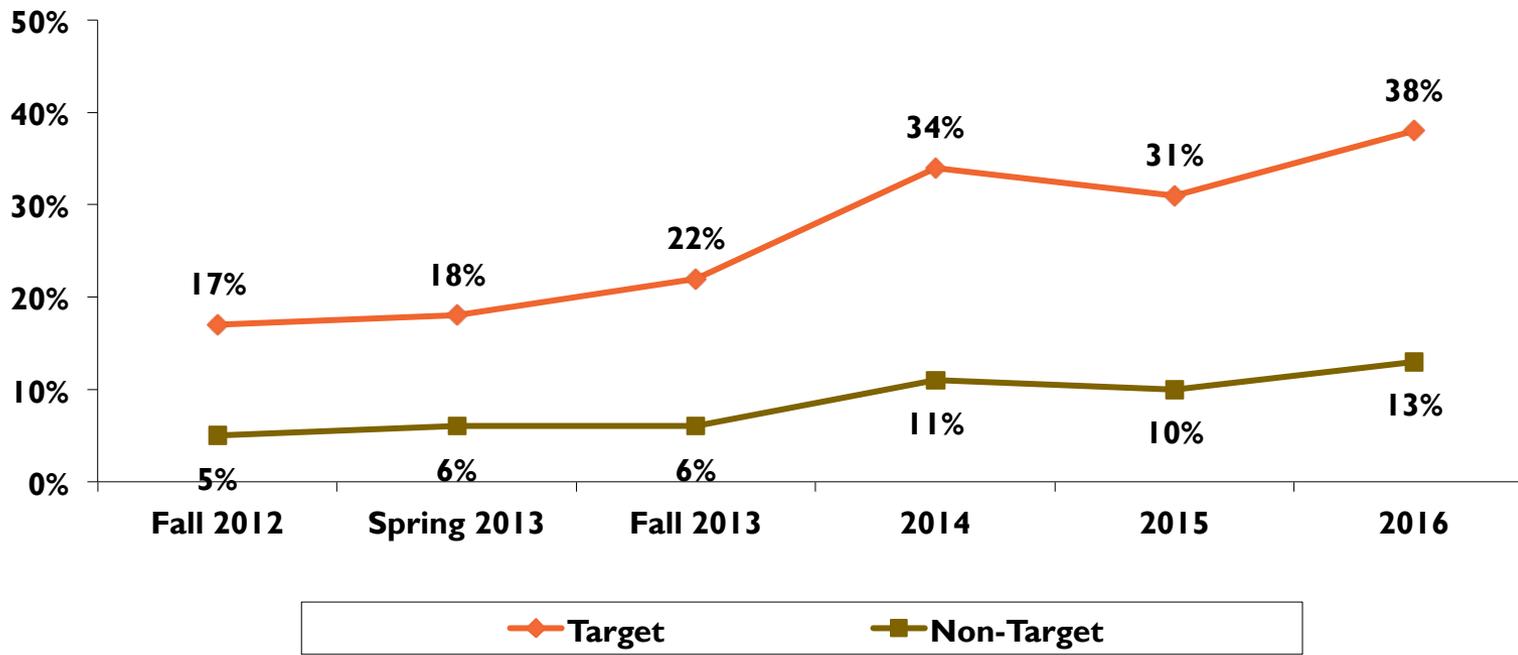
They Are a Staple in My Household as a Reason to Purchase Avocados

- Being a staple in the household continues to be a significant purchase driver among target respondents.



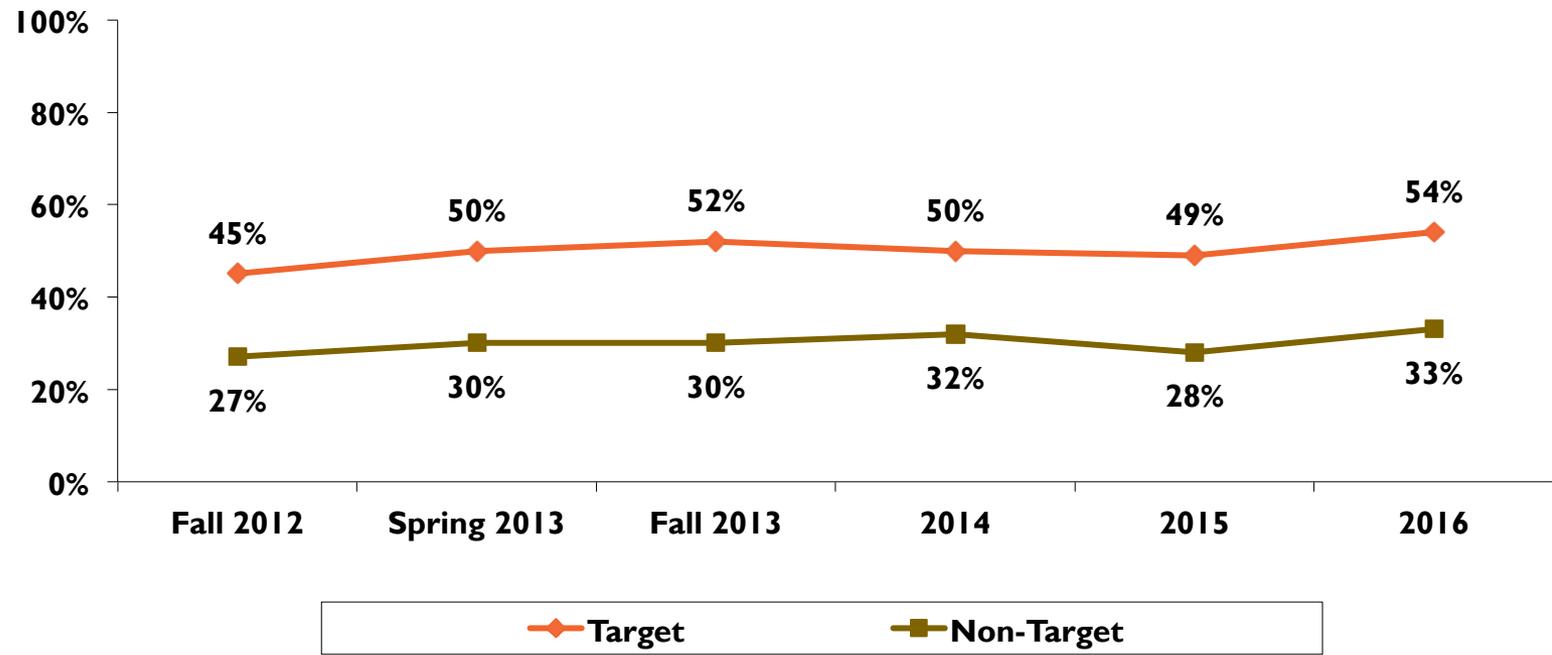
I Buy Them for My Baby/Young Child to Eat as a Reason to Purchase Avocados

- Buying avocados for a baby or young children is still low compared to other drivers, but it is trending up – especially for target audience respondents (note – some of this difference is driven by the simple fact that target audience respondents are more likely to have children in the home).



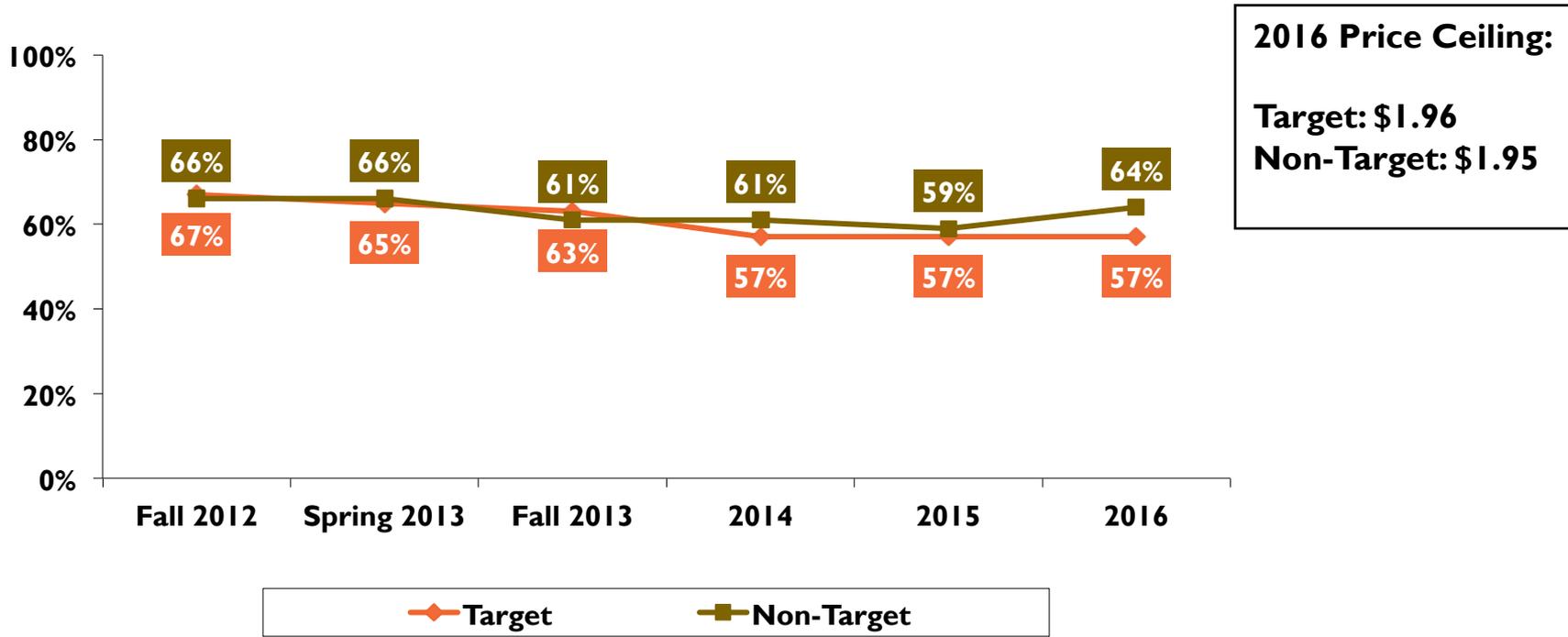
Calories as a Reason to Purchase Avocados

- While the amount of calories in avocados is a more moderate driver of purchase for target respondents, it is more important for this group than for non-target respondents.



Decided Not To Buy Avocados Because of Price

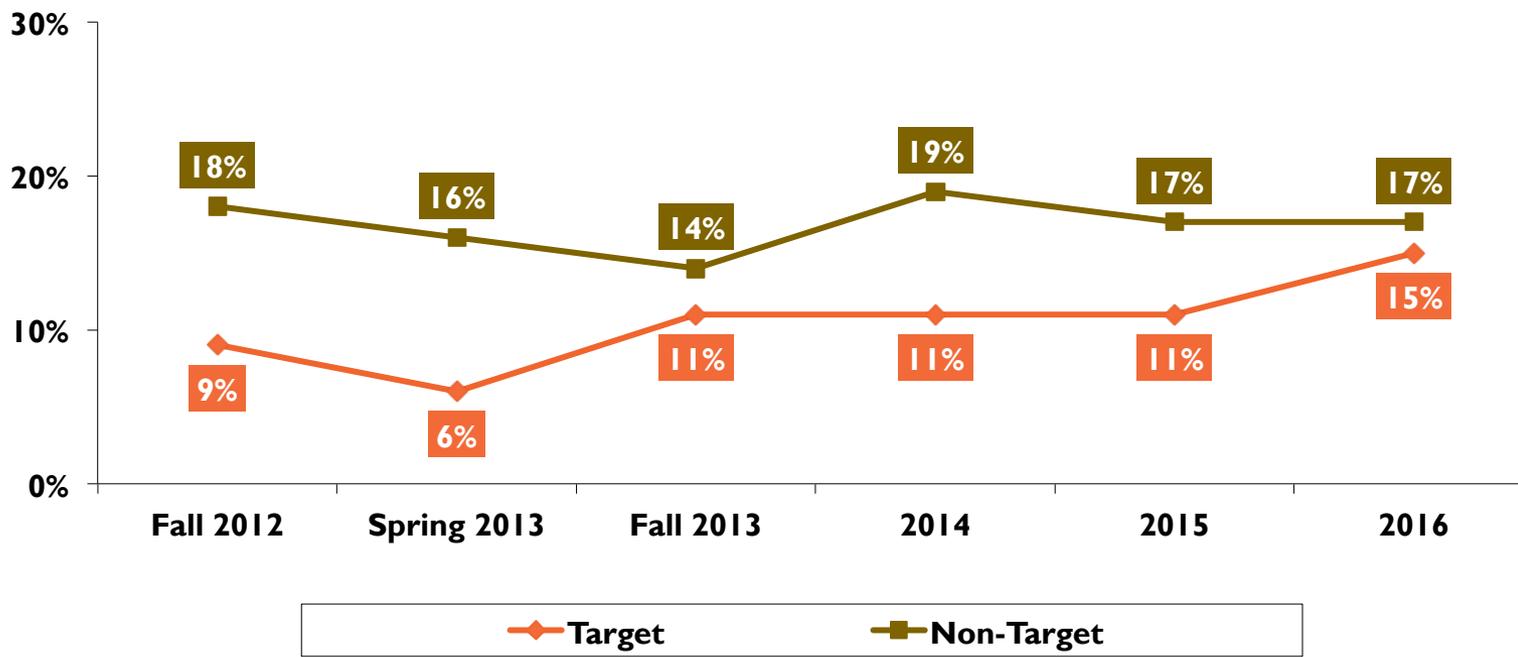
- The impact of price on purchase behavior has been fairly similar between the two groups. This year, the target audience is somewhat more price sensitive than non-target respondents. However, the price considered “too high” is the same for both groups.



Price as a Barrier to Avocado Purchase

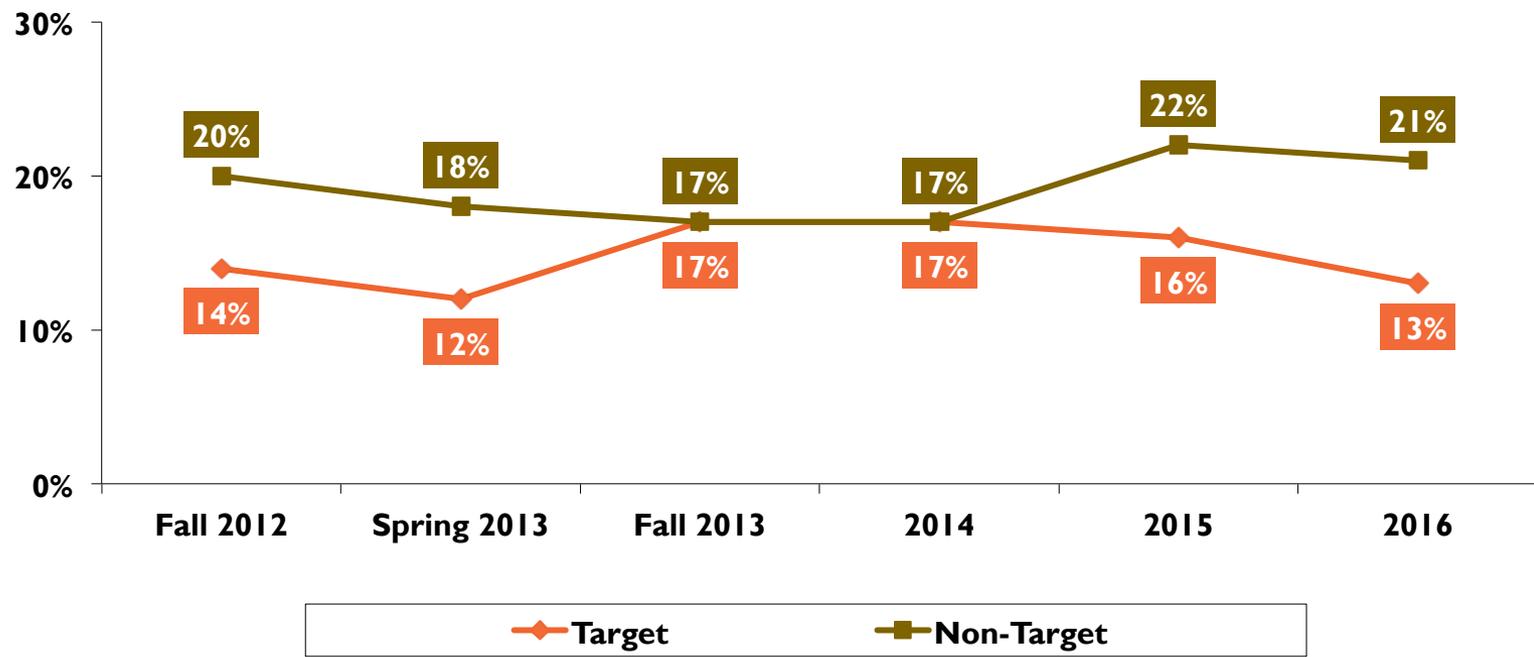
Spring 2014

- While price is not a strong barrier to purchasing avocados for either group, it has typically had more impact on non-target consumers. This year, similar proportions of target and non-target consumers claim price is a potential barrier.



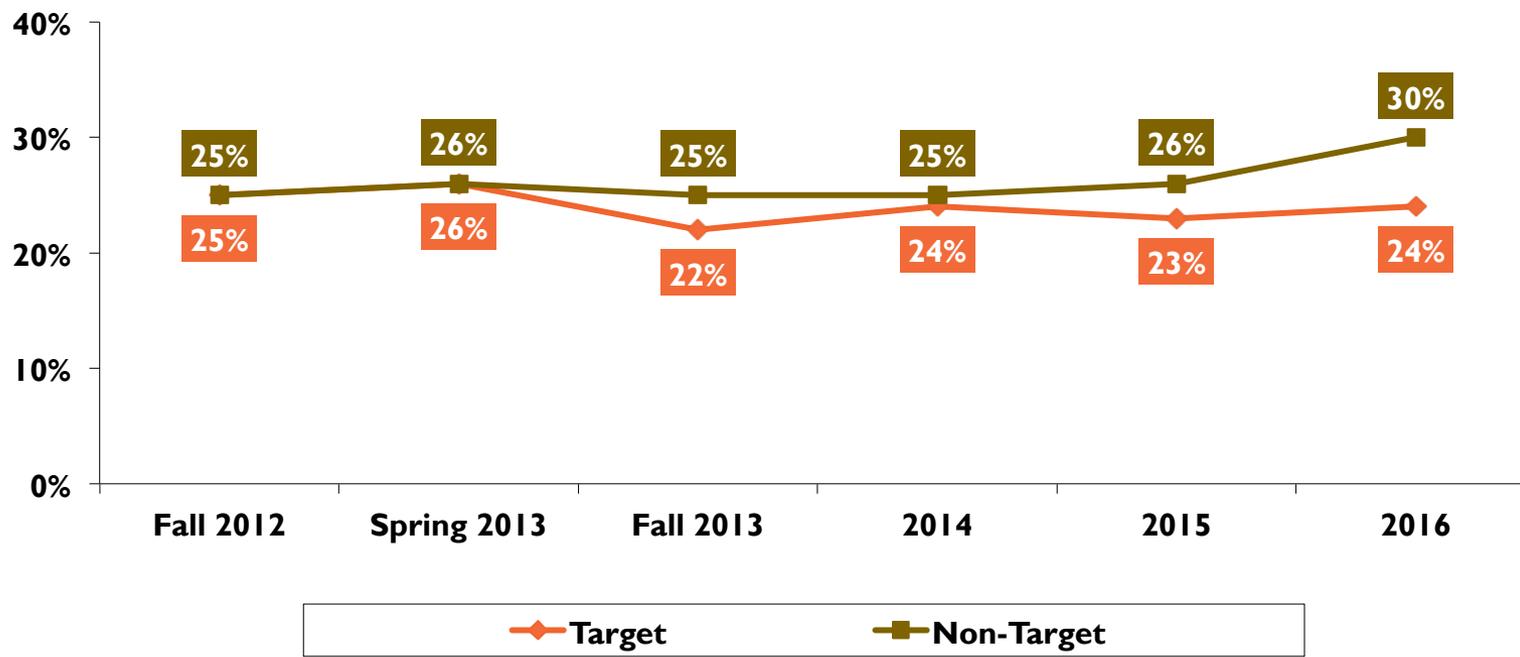
Fat Content as a Barrier to Avocado Purchase

- Fat content is not a huge barrier for either group. However, there was a significant increase on this measure among non-target respondents in 2015, and it has remained at this higher level.



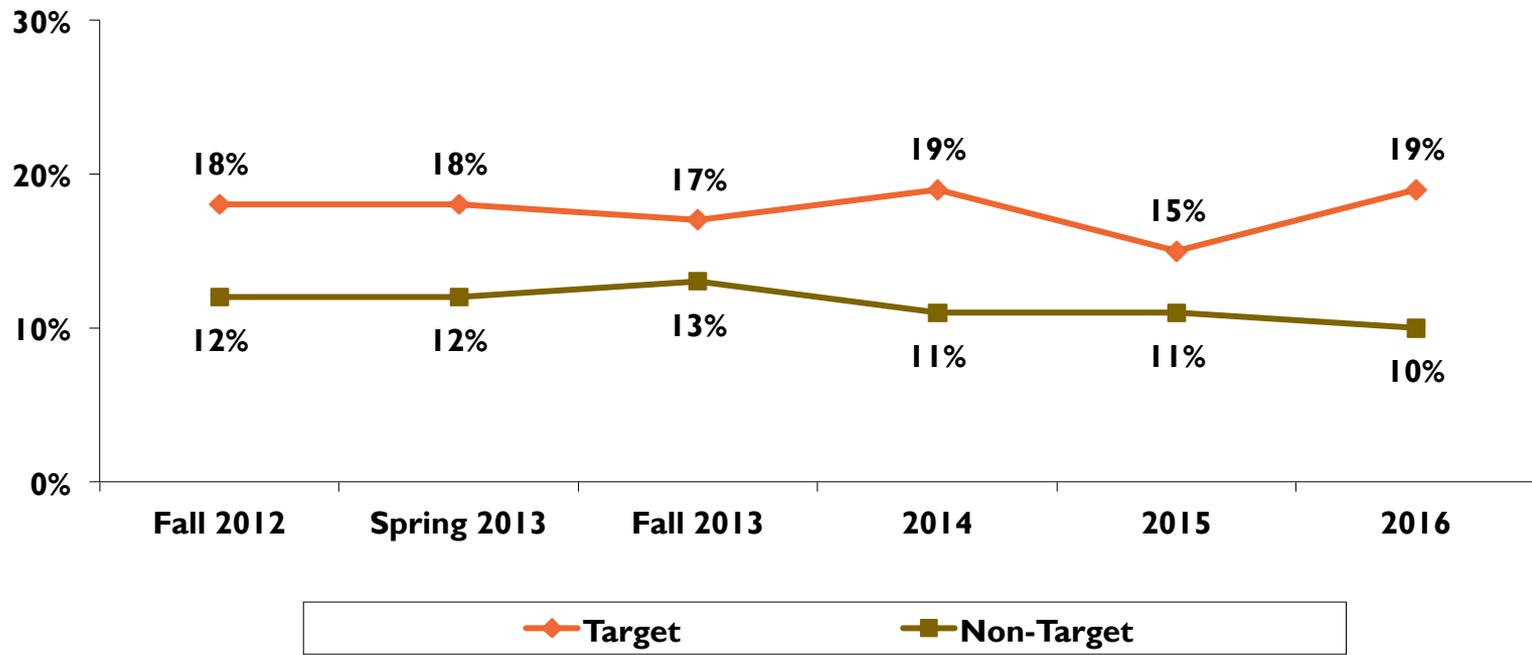
Too Perishable as a Barrier to Avocado Purchase

- Perishability is a minor barrier overall, but it has increased among non-target respondents.



Availability as a Barrier to Avocado Purchase

- Availability (or lack of) of avocados is not a strong barrier to purchase. However, it is more of an issue for target consumers.



Nutrition, Wellness, and Food Safety

Nutritional Benefits Importance 2016 (Top 3-box* Scores)

- As seen over the last few years, target consumers place more importance on all of the nutritional benefits than do non-target consumers.

	Target %	Non-Target %
Contain good fats	77	42
Have nearly 20 essential nutrients	75	43
Contain antioxidants	69	41
Nutrient-dense	67	35
Contain vitamins E and C	65	36
Contain fiber	64	37
Less than 1 gram of sugar	63	35
Contain potassium	63	34
Cholesterol free	61	36
Sodium free	57	33
Low in fat	57	32
Contain iron	57	30
Contain natural plant sterols	56	25
Low in calories	55	34
Contain folate	50	22
Contain lutein	48	21

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 Benefits Associated with Avocados 2016 (Top 3-box* Scores)

- Also as seen in previous years, target consumers more strongly associate all of the nutritional benefits with avocados then do non-target consumers.

	Target %	Non-Target %
Contain good fats	78	45
Have nearly 20 essential nutrients	69	39
Contain antioxidants	68	36
Nutrient-dense	64	35
Sodium free	64	33
Contain vitamins E and C	62	35
Less than 1 gram of sugar	61	32
Contain fiber	59	35
Contain potassium	56	30
Cholesterol free	55	31
Contain natural plant sterols	54	26
High in fat	50	29
Contain iron	49	24
Low in calories	47	23
Contain folate	43	20
Contain lutein	43	18
High in calories	42	22

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 Benefits Associated with Avocados Target Audience (Top 3-box* Scores)

- Over time, target audience respondents' association of nutritional benefits with avocados has fluctuated. We saw more decreases than normal in 2015. While some of those saw a rebound in 2016, everything did not. Remaining lower are "contain folate", "contain lutein" and "high in calories" (for this benefit, a lower score is a good thing).

	Fall 2012 %	Spring 2013 %	Fall 2013 %	2014 %	2015 %	2016 %
Contain good fats	74	73	74	77	78	78
Have nearly 20 essential nutrients	67	64	69	70	68	69
Contain antioxidants	64	62	68	69	64	68
Nutrient-dense	61	60	64	65	62	64
Contain vitamins E and C	60	62	64	67	64	62
Less than 1 gram of sugar	59	55	59	62	60	61
Sodium free	57	61	61	64	62	64
Contain fiber	56	60	62	65	61	59
Contain potassium	56	56	61	59	56	56
Contain natural plant sterols	52	55	55	59	54	54
Cholesterol free	52	53	57	58	56	55
High in fat	51	47	53	52	49	50
Contain iron	45	49	52	54	46	49
High in calories	45	43	48	48	41	42
Contain folate	44	45	51	51	43	43
Contain lutein	40	38	49	47	43	43
Low in calories	37	38	46	46	41	47

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 2016 (Top 3-box* Scores)

- As seen in previous years, the importance of health and wellness benefits is also much higher among target audience respondents than non-target respondents.

	Target %	Non-Target %
Heart health	70	43
Nutrient boosting/helps with nutrient and antioxidant absorption	69	40
Lower cholesterol/ healthy cholesterol levels	67	39
Digestive/gut health	67	38
Healthy skin	67	35
Satiety, fullness, hunger control	67	33
Healthy aging	66	37
Healthy weight maintenance/weight management	66	35
Cognitive skills, brain health and mental function	65	38
Healthy blood pressure	64	41
Healthy blood vessels/ vascular health	64	38
Healthy eyes and vision	64	37
Cancer prevention	64	37
Immunity	64	35
Smooth skin/minimizes wrinkles	62	30
Weight loss	60	32
Healthy sleep pattern	59	31
Diabetes management/ blood sugar and blood glucose management	56	32
Child growth and development	54	25
Pain relief	52	26

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

2016 (Top 3-box* Scores)

- As seen in previous years, target audience respondents are much more likely to associate all the health & wellness benefits with avocados than are non-target respondents.

	Target %	Non-Target %
Heart health	63	30
Healthy skin	63	29
Nutrient boosting/helps with nutrient and antioxidant absorption	62	31
Satiety, fullness, hunger control	62	28
Lower cholesterol/ healthy cholesterol levels	60	31
Healthy aging	60	25
Healthy weight maintenance/weight management	59	25
Healthy blood vessels/ vascular health	58	25
Cognitive skills, brain health and mental function	58	23
Digestive/gut health	57	24
Smooth skin/minimizes wrinkles	56	25
Healthy blood pressure	56	24
Healthy eyes and vision	55	23
Immunity	55	23
Child growth and development	52	17
Diabetes management/ blood sugar and blood glucose management	51	22
Cancer prevention	51	21
Weight loss	49	19
Healthy sleep patterns	47	17
Pain relief	39	14

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

Target Audience (Top 3-box* Scores)

- Target audience respondent's agreement with the various health & wellness benefits associated with avocados has increased over time. The largest increases are highlight in green.

	Fall 2012	Spring 2013	Fall 2013	2014	2015	2016
	%	%	%	%	%	%
Heart health	60	60	66	64	62	63
Nutrient boosting/helps with nutrient and antioxidant absorption	59	59	65	68	67	62
Healthy skin	59	57	64	66	63	63
Satiety, fullness, hunger control	58	54	63	63	61	62
Lower cholesterol/healthy cholesterol levels	57	53	60	61	61	60
Healthy aging	55	55	59	62	60	60
Healthy blood vessels/vascular health	55	52	61	61	57	58
Smooth skin/minimizes wrinkles	54	53	61	57	57	56
Healthy blood pressure	52	54	60	61	58	56
Healthy eyes and vision	51	52	58	59	53	55
Healthy weight maintenance/weight management	51	52	54	55	54	59
Cognitive skills, brain health and mental function	50	53	60	55	54	58
Cancer prevention	49	49	54	53	49	51
Diabetes management/blood sugar and blood glucose management	46	47	54	52	50	51
Child growth and development	44	43	48	51	44	52
Weight loss	42	37	48	47	44	49
Digestive/gut health	NA	NA	NA	59	55	57
Immunity	NA	NA	NA	55	53	55
Healthy sleep patterns	NA	NA	NA	49	45	47
Pain relief	NA	NA	NA	38	34	39

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".

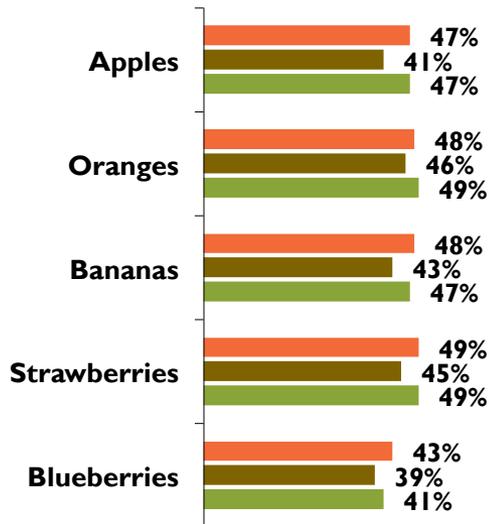
*Top 3-box: 8, 9, or 10 on an eleven point scale **35**

Avocado Healthfulness Compared to Fruits

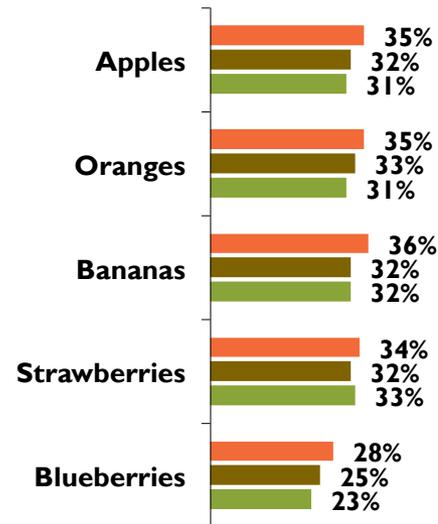
(Top 2-Box* Scores (Avocados are healthier))

- Target audience respondents continue to be more likely than non-target respondents to think avocados are healthier than the other fruits.

Target Audience



Non-Target Audience



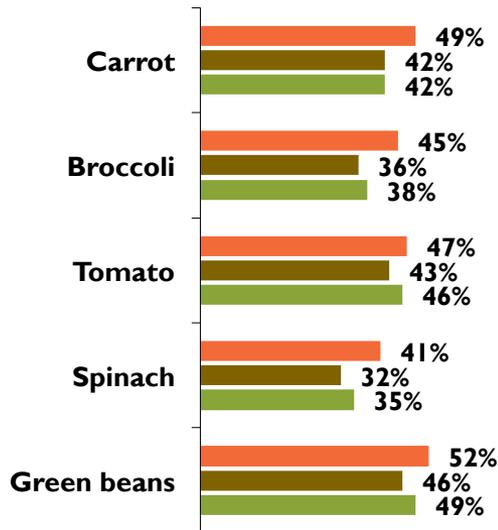
*Top 2-box: 4 or 5 (More healthy) a 5-point scale

Avocado Healthfulness Compared to Vegetables

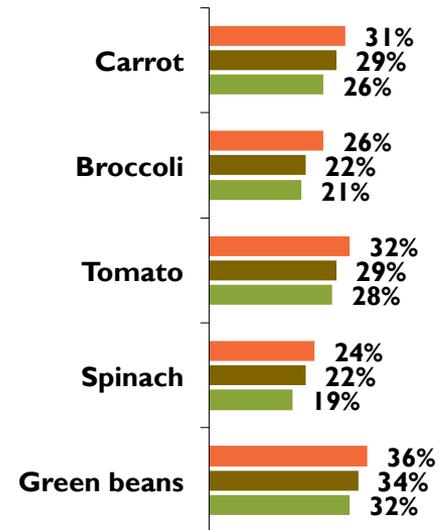
(Top 2-Box* Scores (Avocados are healthier))

- Target audience respondents also continue to be more likely than non-target respondents to think avocados are healthier than the vegetables included in this study.

Target Audience



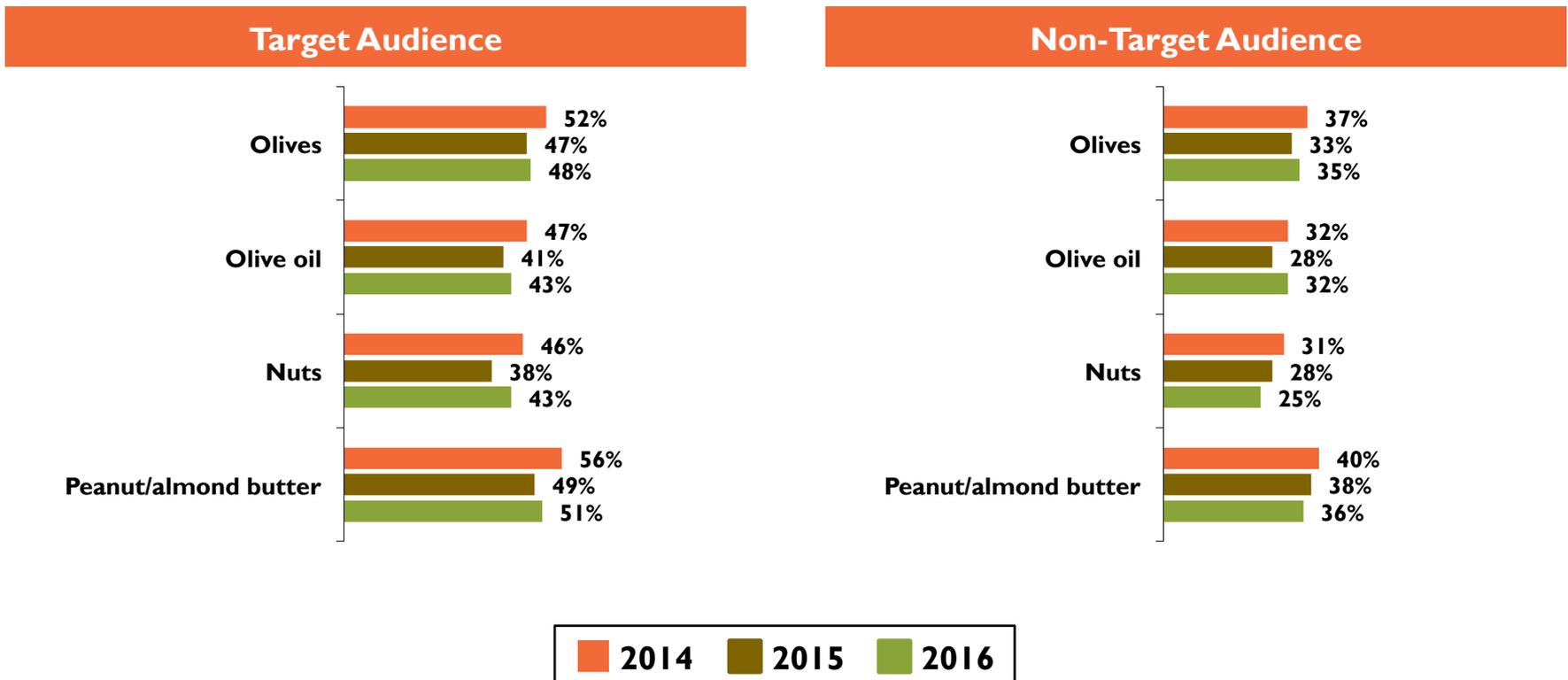
Non-Target Audience



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

Avocado Healthfulness Compared to Other Healthy Fat Sources (Top 2-Box* Scores (Avocados are healthier))

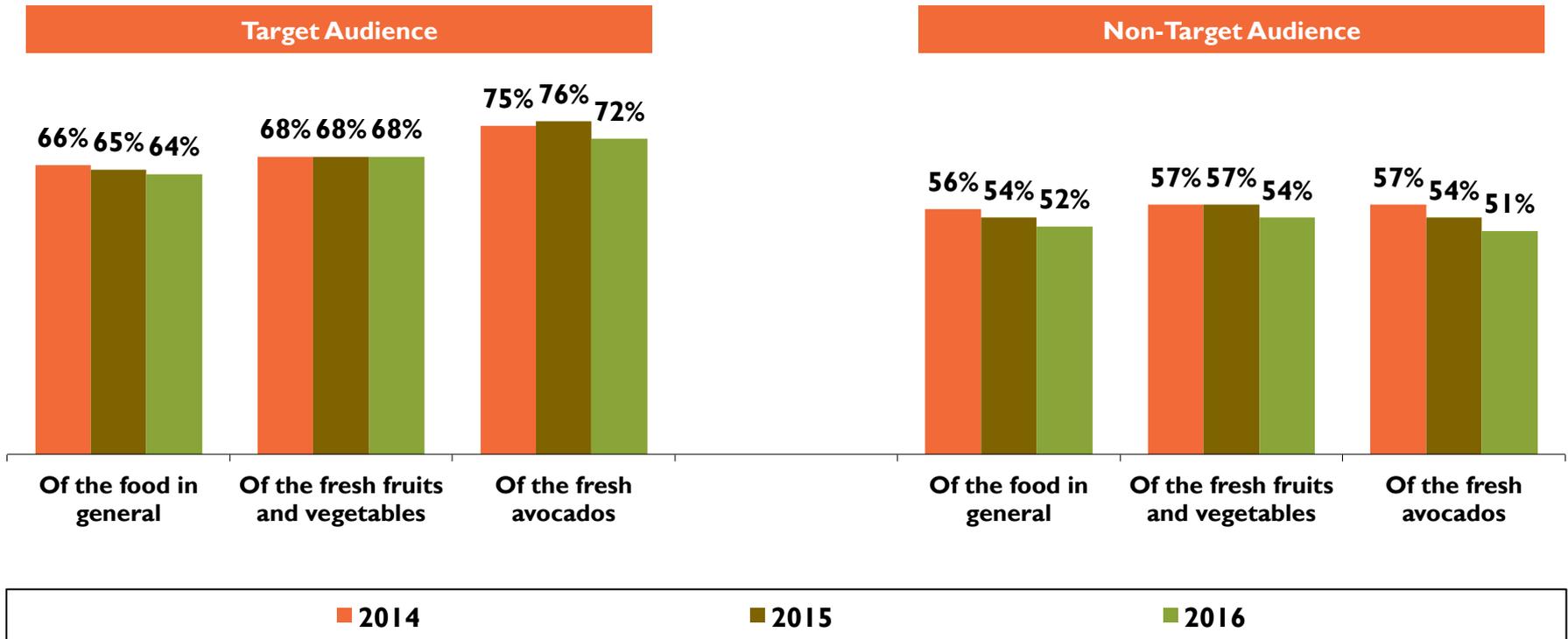
- Target audience respondents also continue to be more likely than non-target respondents to think avocados are healthier than other healthy fat sources.



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

Confidence in Safety of Food Purchased (Top 2-Box* Scores)

- Target audience respondents are more confident in the safety of the various foods than are non-target respondents. This remains especially true for avocados.

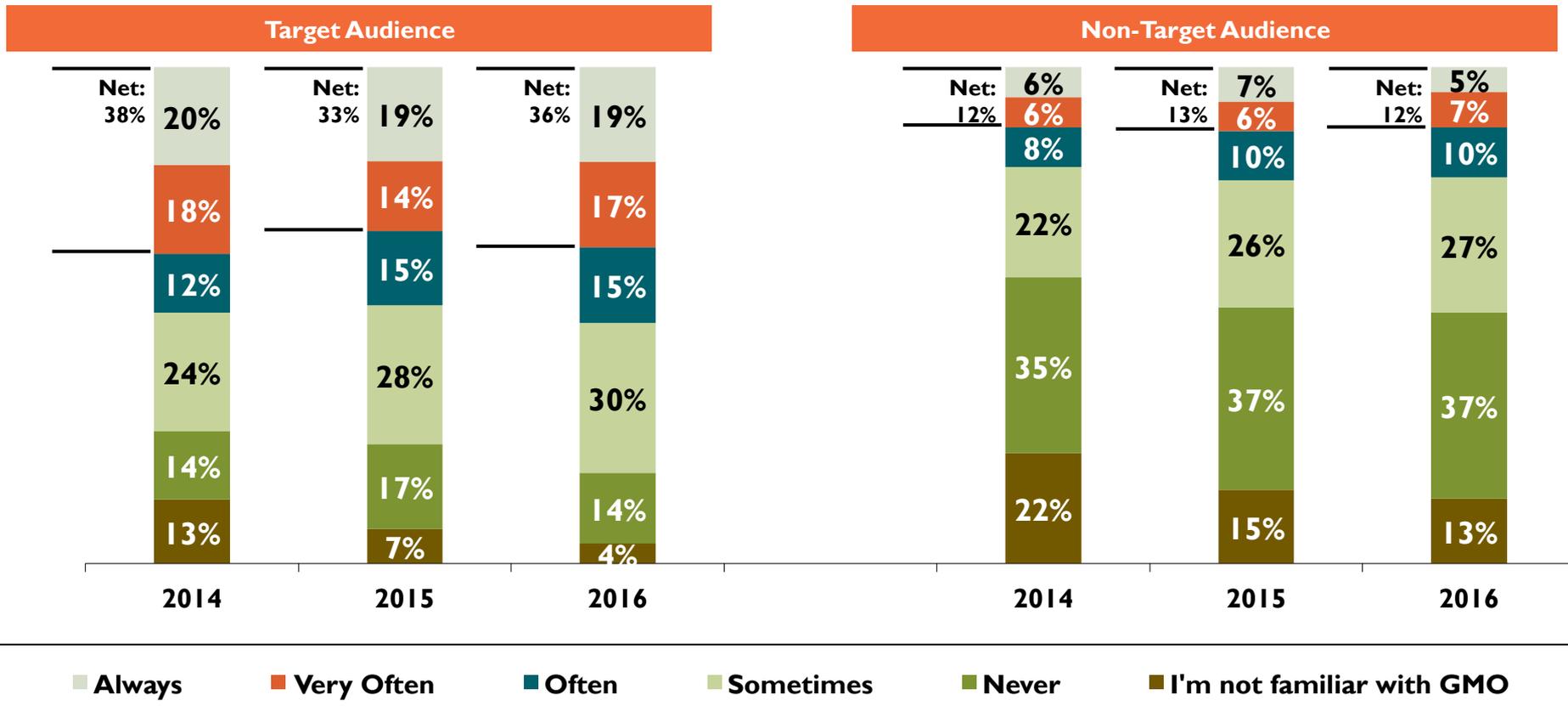


Q1105 – Overall, how confident are you in the safety of the food that you purchase in the stores where you regularly shop for your groceries?
 Q1106 – Overall, how confident are you in the safety of the fresh fruits and vegetables that you purchase in the stores where you regularly shop?
 Q1107 – Overall,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

*Top 2-box: 3 or 4 (Confident) a 4-point scale

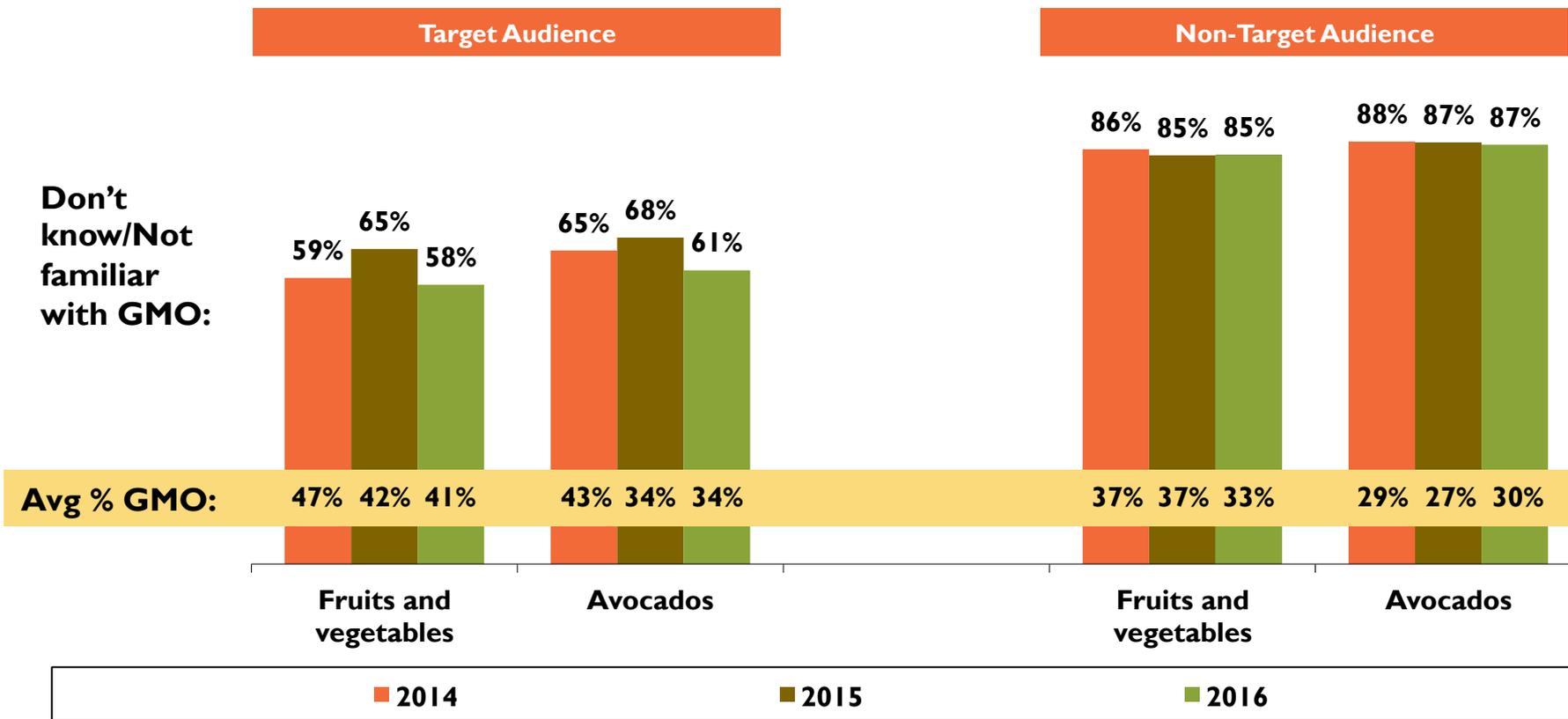
Frequency of Checking if Food Product is GMO Free

- Somewhat over one-third of target audience respondents frequently check to see if a food product is GMO free, a much larger proportion than seen among non-target respondents.



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

- As seen in the past, most consumers don't know the percent of foods or avocados that they purchase that are GMO, regardless of whether they are target or non-target audience.
- Among respondents who do believe they understand GMO, more target audience respondents feel that a large proportion of these foods are GMO than do non-target respondents. For avocados, the expected proportion is lower among target respondents than 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?

Efforts Likely to do In The Future to Purchase and Consume More Sustainable Foods and Beverages

New Question 2016 (Top 2-box* Scores)

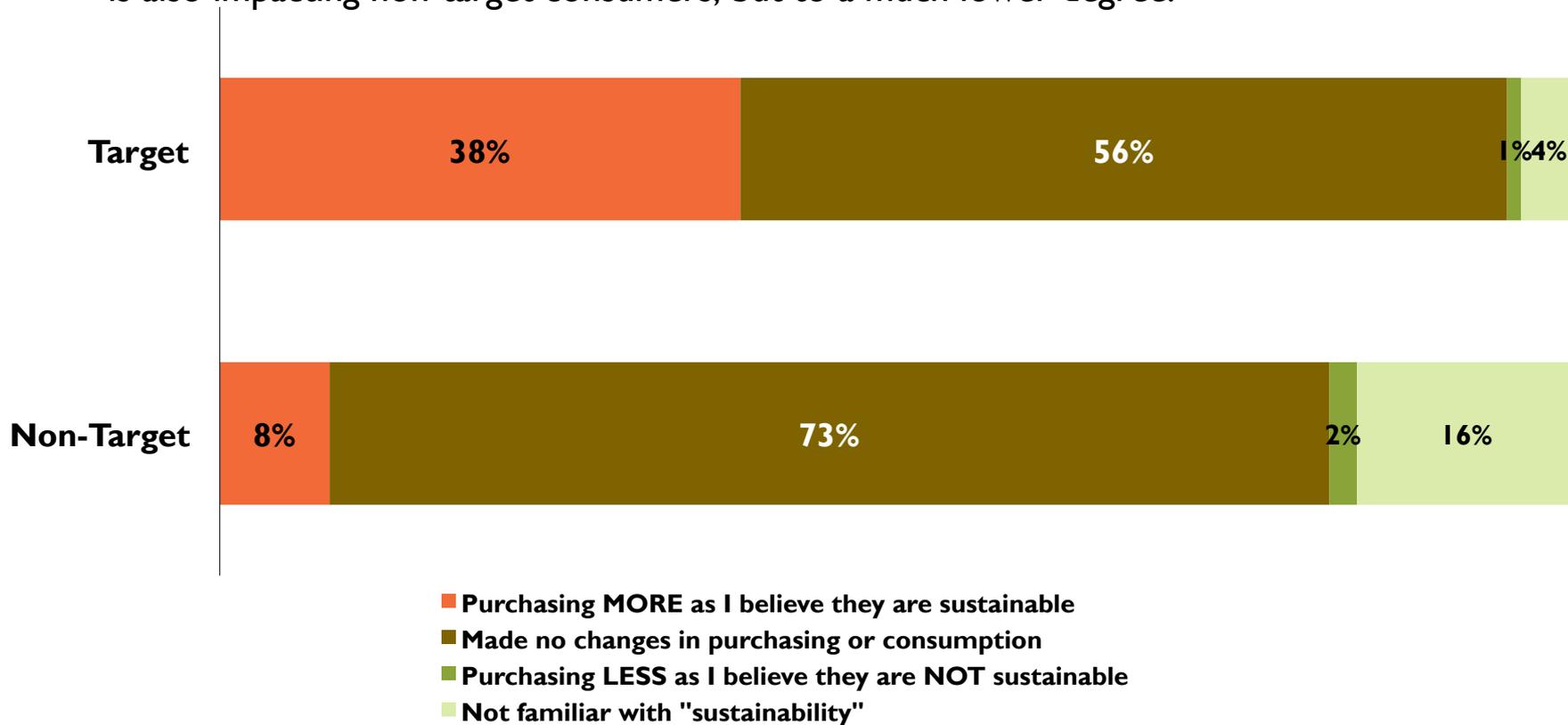
- Consumers claim they are likely to undertake many steps to help consume more sustainable foods and beverages. Top activities are highlighted below.
- Non-target consumers will take steps to help, but they are not as committed as are target consumers.

	Target %	Non-Target %
Avoid foods from companies, brands and restaurants that have frequent food safety problems	82	67
Purchase foods that use currently farmed land more efficiently so forests and other protected lands are not used for farming	69	40
Eat more locally produced foods that require less energy to transport and store	80	59
Purchase foods that help reduce the amount of pesticides used	78	52
Eating less grains, fruits and vegetables that require a great deal of water to grow	39	16
Purchase foods made with ingredients from GMO crops that are grown more efficiently with fewer inputs like water, pesticides or the fuel needed for farm machinery	43	23
Support food companies, brands and products that treat and pay their workers fairly	73	46
Purchase foods that require little water, or use water efficiently	55	29
Shift my eating patterns away from meat (beef, pork, chicken) to plants (grains, fruits, vegetables) which require fewer inputs like water, pesticides or the fuel needed for farm machinery	52	25
Purchase fewer foods made with ingredients from GMO crops	62	36

Change in Avocado Purchasing and Consumption Based on Perceived Sustainability

(New question 2016)

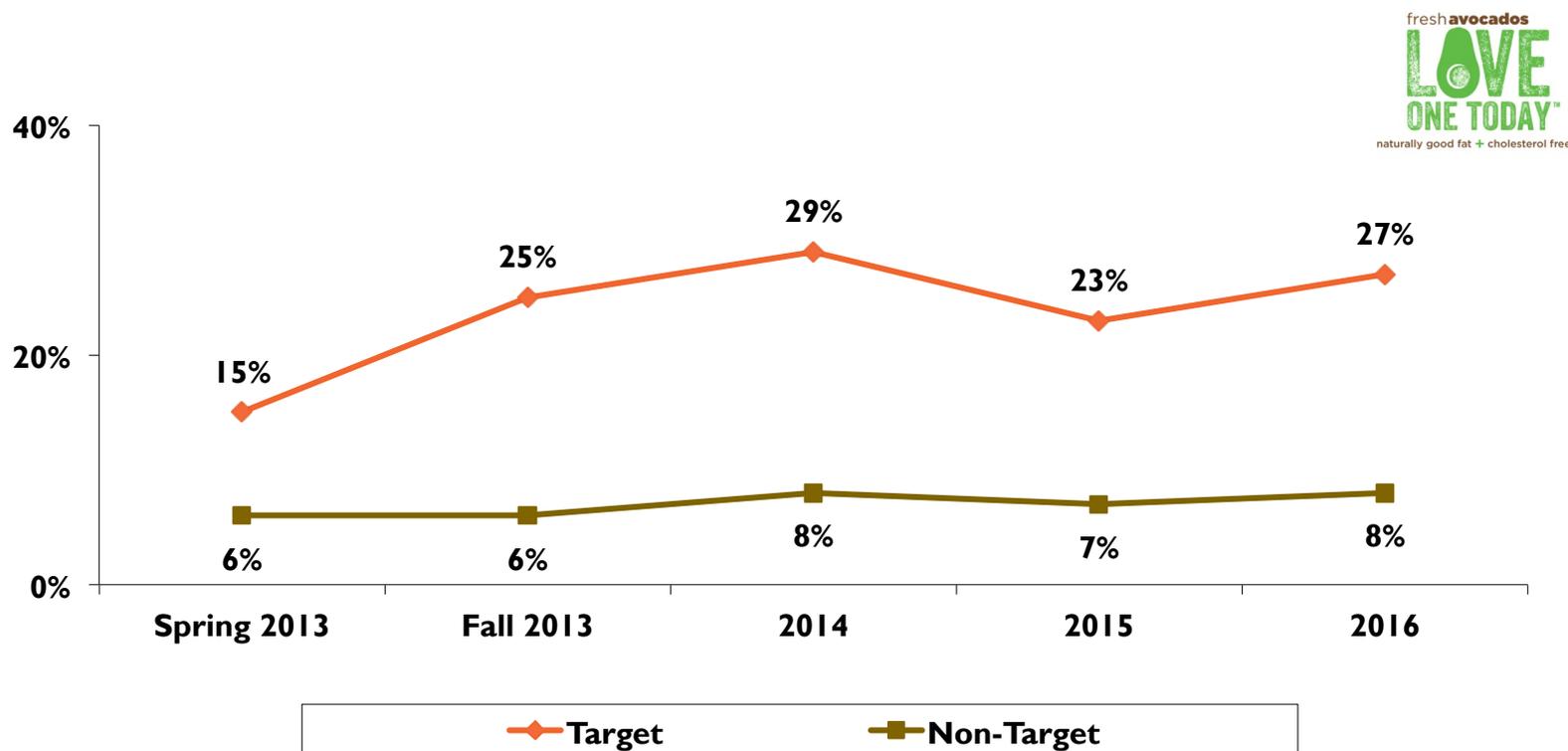
- Perceived sustainability is driving increased avocado consumption among target consumers. It is also impacting non-target consumers, but to a much lower degree.



Advertising and PR Impact

Seen “Love One Today” Logo in Past Month

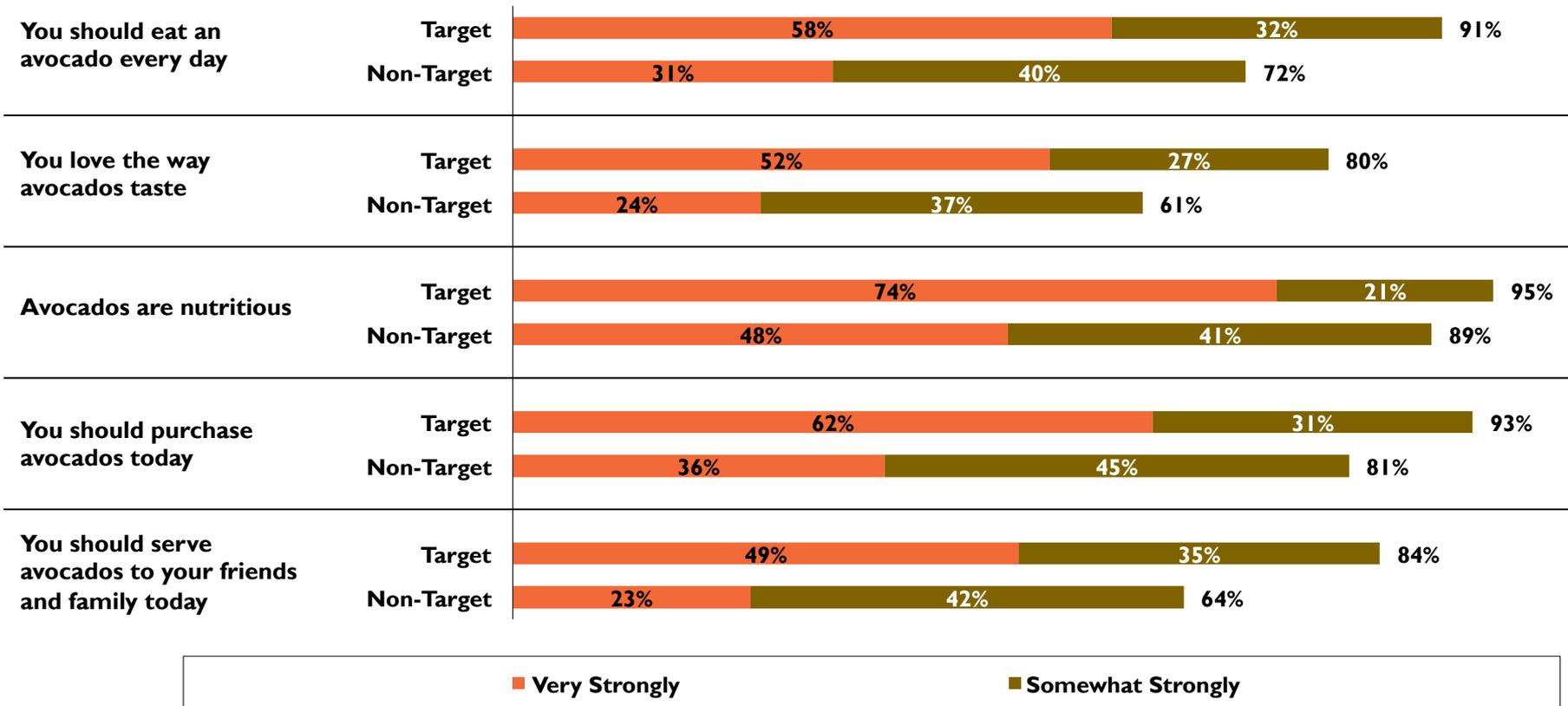
- Awareness of “Love One Today” remains significantly higher among target audience respondents. The decrease seen in 2015 among target audience respondents appears to have been temporary.



Statements Logo Communicated

(New question 2016)

- “Love One Today” is communicating many positive messages, with the strongest message being for “avocados are nutritious”. Strong secondary messages are that you should eat an avocado every day and that you should purchase avocados today.



News Articles Related to Health Benefits of Avocados Seen in Past Few Months 2016

- As seen in previous years, target audience respondents are more likely than non-target respondents to claim awareness of news articles related to the health benefits of avocados.

	Target %	Non-Target %
Avocados contain naturally good fats and they are cholesterol free	52	21
Eating avocados is associated with a healthier diet and lower body weight.	40	16
Eating one avocado a day can improve cholesterol and triglyceride profiles and support a well-functioning heart.	33	10
Avocados can help with hunger control and weight maintenance.	36	12
Eating avocados with a hamburger may contribute to blood vessel and heart health benefits.	25	7

News Articles Related to Health Benefits of Avocados Seen in Past Few Months Target Audience

- Target audience respondents' claimed awareness of news articles about the health benefits of avocados, which saw many decrease last year, has generally rebounded.

	Spring 2013 %	Fall 2013 %	2014 %	2015 %	2016 %
Avocados contain naturally good fats and they are cholesterol free	NA	NA	47	42	52
Eating avocados is associated with a healthier diet and lower body weight.	27	34	39	33	40
Eating one avocado a day can improve cholesterol and triglyceride profiles and support a well-functioning heart.	26	33	37	30	33
Avocados can help with hunger control and weight maintenance.	21	25	37	26	36
Eating avocados with a hamburger may contribute to blood vessel and heart health benefits.	18	21	28	19	25

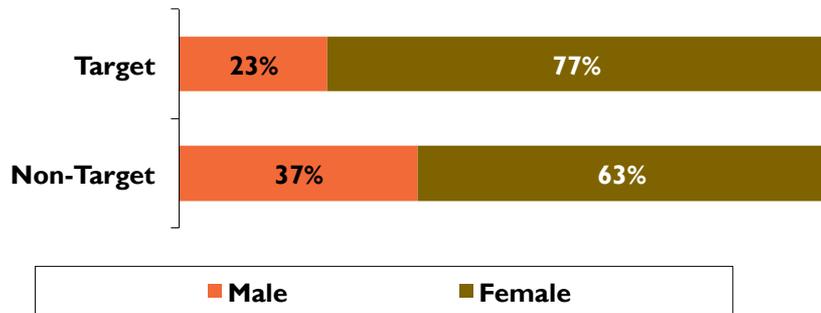
Demographic Profile

Demographic Profile

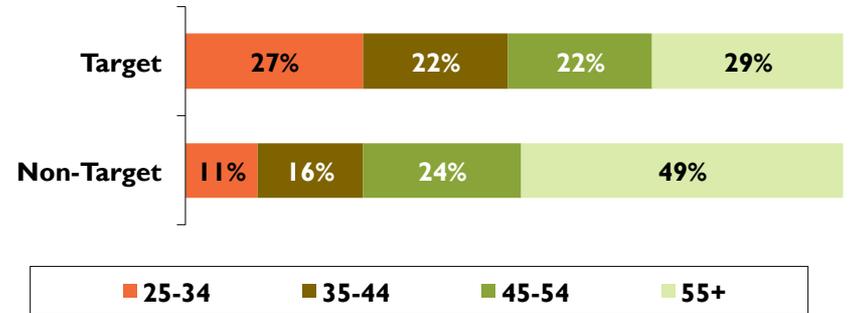
2016

- Target audience respondents skew more female, younger, more likely to be married/partnered and have a higher household income.

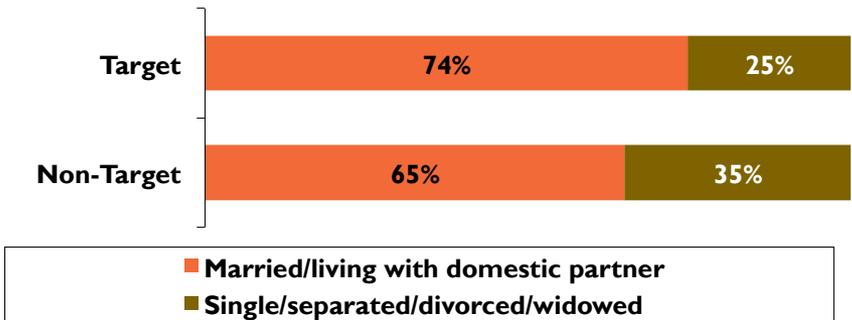
Gender



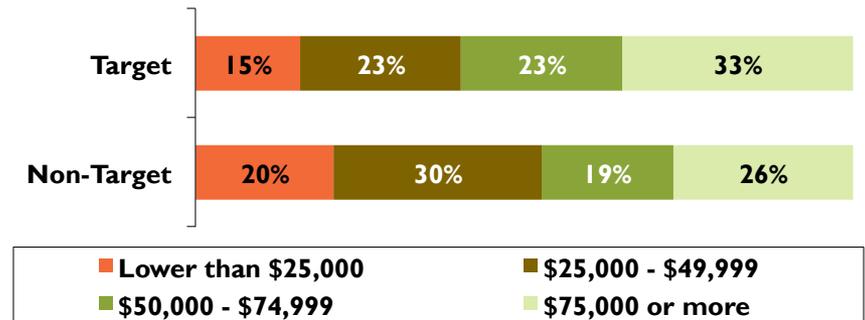
Age



Marital Status



Annual Household Income

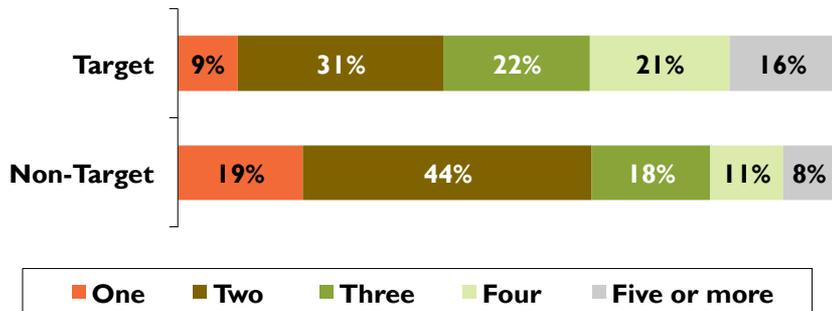


Demographic Profile (Cont.)

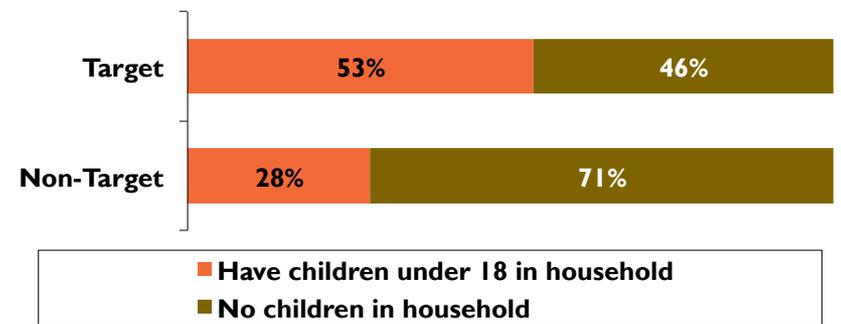
2016

- Target audience respondents live in larger households, are more likely to have children, are slightly more highly educated, and are more likely to be employed.

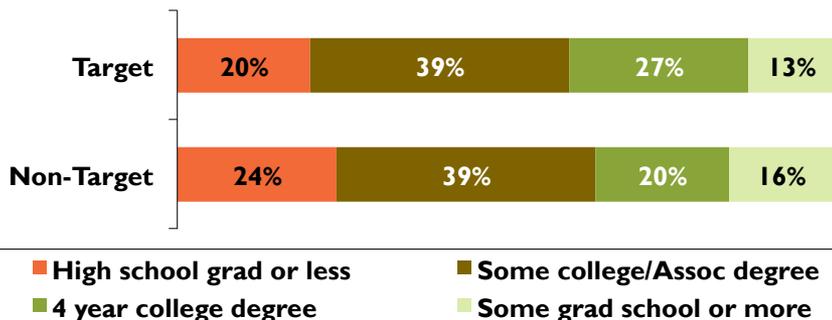
Number of People in Household



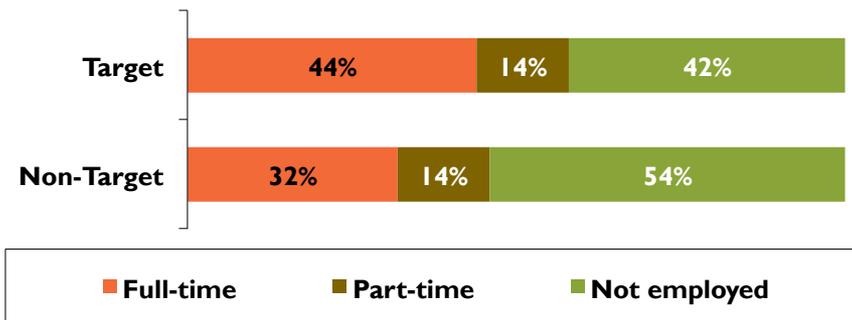
Children in Household



Education Level



Employment Status



Demographic Profile (Cont.)

2016

- Target audience respondents are more ethnically diverse and while the majority of them were born in the United States, a larger proportion of them did move here from another country, than seen among non-target respondents.

