ABSTRACT
2008 U.S. Avocado Attitudes and Usage Study

Type: *Consumer Usage Study*

Purpose:

- *To better understand consumption of avocados at home and away from home*
  - *How often and when are avocados purchased for home use*
  - *How are avocados being used/prepared in the home*
  - *Who in the household is consuming and how*
  - *General attitudes towards avocados*
  - *When visiting a restaurant, who orders and how often - dishes with avocados*

- *To identify and segment behaviors of avocado consumers with which to utilize for marketing insights and opportunities*

Key Benefits/Attributes:

This study was prepared using the National Trends Eating (NET) database utilizing eight years of data collection through November 2007.

- *The NET database is a collection of personal entries/diaries written by selected and varied households throughout the U.S.*
- *The entries are made based on daily / current usage, not recollection of historical events/usages.*

This in-depth report provides first-hand accounts:

- *"Who" most often enjoys avocados*
  - *Demographics, age, lifestyle*
- *"What" consumers buy their avocados with*
  - *Purchase behavior – planned versus impulse*
  - *Complementary basket items*
- *"How" consumers prefer to enjoy their avocados – in what dishes*
- *"When" consumers enjoy their avocados*
  - *Meal times*
  - *Types of occasions*
- *"Where" consumers enjoy eating avocados*
  - *Types of restaurants*
- *"Which" growing region consumers prefer*

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Results / Conclusion:

- *Consumers' acceptance and interest in avocados continues to grow as new users and new usages are introduced*
  - *Avocado eatings per capita has been on the rise, increasing from 1.2 in 1998 to 2.2 in 2007*
  - *Hispanic ethnicity plays a strong role in usage and ordering of avocados*
    - *Avocado usage among Hispanic families is likely to happen naturally at a higher rate*
  - *Salads are the most common host food for avocados which accounted for 39% of foods/meals that included avocados*

- *In the past year, half of consumers indicated having either purchased avocados at the grocer and/or ordered avocado-based dishes at a restaurant*
  - *Consumers purchase avocados about twice a month at the grocery store*
  - *At restaurants, avocados are ordered about 8 times a year*
    - *Guacamole is the leading restaurant avocado dish followed by a variety of Mexican dishes and salads*
    - *Avocado dishes are ordered 3 times more often at casual dining restaurants (e.g. Chili's, Applebee's) than other types of restaurants*
    - *Adult females are more likely to order avocado-based dishes at restaurants than other household members*

- *Avocado usage, both inside the home and out, skews toward older, upper income and more educated households as well as to the western half of the country*
  - *The "overall" avocado consumers is female, somewhat older and slightly more educated than typical consumer*
    - *Nearly seven-in-ten adult females have purchased avocados at the grocery store and/or ordered as a restaurant dish in the past 12 months*
  - *Younger DINK's (under 35 years) are most likely to be ordering avocado-based dishes from restaurants*

- *Mature adults lead consumption/usage of avocados*
  - *In the West, all ages consume avocados fairly evenly; however, seniors (65+) have a higher propensity to eat avocados*
  - *In the Central area, the 55-64 age group was the highest trending avocado users*
  - *In the Northeast area, the 45-54 age group was the highest trending avocado users*
  - *In the Southeast area, the 18-34 age group was the highest trending avocado users followed by the 65+ age group*

- *"Veteran" avocado buyers are the most loyal and diverse of all users, but may be somewhat "set" in their ways*
  - *This segment (those who have been buying for 10 years or more) account for 75% of all buyers*
    - *The longer you have been buying avocados, the more of them you continue to buy each year*
    - *On average, the "veteran" avocado buyer purchases 23 avocados a year, compared to only 16 for those who just started purchasing avocados in past 10 years.*

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- *They appear to be the most "educated" and "comfortable" with avocados as supported by their knowledge of seasonality and producer location as well as their ease of use in pitting and peeling avocados*
- *However, while avocado's "taste" encourages repurchase among this group, consumption profiles indicate veteran users prefer to eat avocados "alone"*
    - *Opportunities for increased usage versatility may be limited as already considered an "every day" diet staple among this group*

- *Key Consumer Segments*
    - *"Mature Salad Boost" shows the highest affinity for avocado usage; this group is described as:*
        - *Mostly high income Empty Nesters and Seniors; some families with kids*
        - *Age Target: 55+ with an opportunity to further develop 45-54 years old*
        - *Primary Host Food: Avocados on Salads*
        - *This segment is likely to include guests at the meal*
    - *The next group closely following "Mature Salad Boost" in avocado usage is "Young Ethnic Diversions"; this group is described as:*
        - *Mostly high income Families with kids <18 years old in the house*
        - *Age Target: 45-54 with opportunity to develop everyone younger*
        - *Primary Host Food: Avocados on salads, in Mexican Dishes, and dips/guacamole*
        - *This segment is comprised of Non-Hispanic families, typically with 1-2 kids*
        - *These meal occasions are when adults and kids are present together at the meal*
        - *Avocados are eaten most often at complex dinners (3+ dishes) with 4+ people present*

- *Positive taste, meal enhancement and versatility expectations are cited as primary motivations for continuing to purchase avocados*
    - *58% of say that there is nothing that can replace an avocado in a recipe (because of unique taste and texture)*
        - *Avocados are typically a planned purchase, especially when used as an ingredient and its unique taste and texture makes it irreplaceable during recipe preparation*
        - *Avocados elicit feelings of providing "something special" to users*
    - *Current buyers, especially heavy or long term avocado users, state they will most likely purchase avocados again in next three months*
    - *Price is the leading reason why an avocado is not purchased even though buyer may have planned on it*

- *Avocado purchases generate additional grocery store purchases during the same shopping trip*
    - *Eight out of every ten avocado purchases is accompanied by the purchase of at least one other grocery item*
        - *Most common incremental purchases include ingredients for guacamole preparation – tortilla chips, fresh tomatoes, fresh lemon/lime, onions, cilantro, sour cream*
        - *Secondarily, purchase of ingredients for Mexican dishes are noted – tortillas, salsa/picante, lettuce and peppers*

- *When asked what might encourage additional avocado eatings in the future, consumers consistently indicated that an increased knowledge of what to do with the avocado – meal, appetizer and salad recipes is of the most interest*

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- *62% of avocado buyers are unconcerned with whether avocado is grown domestically or imported*
  - *The "veteran" avocado buyer is more interested in purchased domestically produced avocados than "new" buyers*
  - *Half of avocado purchasers have no idea where their purchased avocado was grown*

Usage:

This comprehensive and complex study is 120 pages in length which delves into avocado usages by types of meals, times of day and types of people sorted and segmented by demographics and occasions.

Insights from this report can be used to:

- *Focus marketing dollars to specific demographic segments such as: Mature Salad Boost and Young Ethnic Diversions*
- *Decide which region and / or retailers to allocate marketing resources towards in order to further grow the avocado category*
- *Identify and create new relationships with key retailers with which to increase distribution and category awareness*
- *Target specific areas that may benefit from more educations and communication efforts to help grow "new" users to "veterans" users*
- *Build and offer new marketing tools to address consumer preferences as well expand usage through consistent communications and education*
  - *Raise awareness of avocados in non-Hispanic households*
  - *Educate households about recipes that incorporate avocados to expand their usage outside of salads and guacamole*
  - *Develop new recipe, usage ideas specific to target markets*
  - *Offer easy salad and guacamole recipes to areas that are undeveloped*

Time Frame / Frequency:
This report was prepared in November 2008.
Data included 8-years ending November 2007.

Sources:
Data collected by – NPD Group
Report researched and prepared by – NPD Group