

2021 California Avocado Tracking Study Highlights



Conducted regularly since the mid-1990s, the California Avocado Tracking Study helps the California Avocado Commission measure progress against some of the objectives and performance measures in the annual business plan and provides a wealth of data about perceptions among avocado shoppers. This information provides insights that guide consumer communications and support “sell-in” activities with retailers.

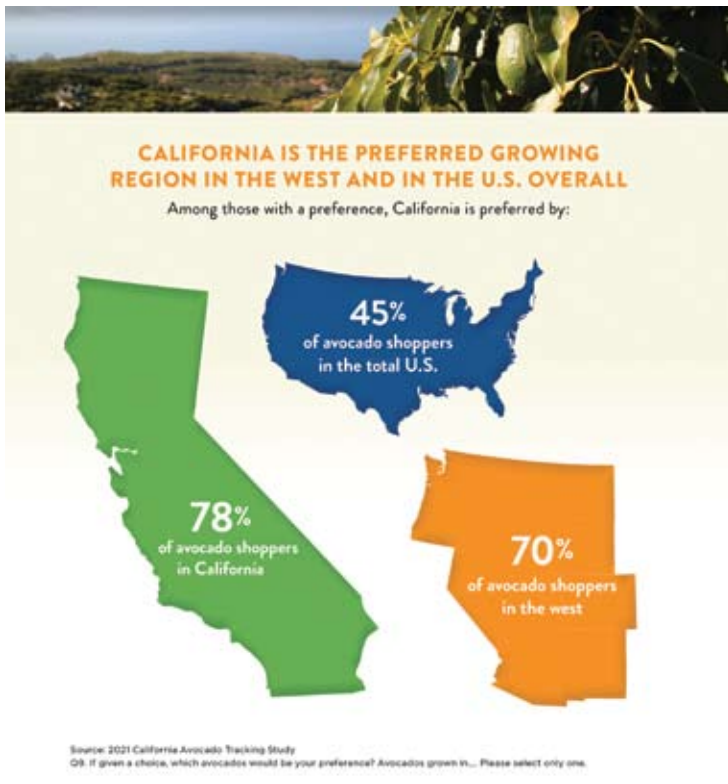
In 2021, surveys were conducted from August 9 through September 9, and the results were presented to the California Avocado Commission Marketing Committee in December and at the Board Meeting on February 24, 2022. Nearly 1,500 avocado shoppers were interviewed from Arizona, California, Colorado, Oregon, Utah and Washington in the West region, as well as from the Central, South and Northeast regions. From these interviews a sample also was balanced to project to the total United States. Supplemental surveys in California were conducted in order to analyze subgroups within the California market in depth.

Summary of 2021 California Avocado Tracking Study Learnings

Avocado purchasers buy avocados fairly regularly: 73% of Californians and 87% of the Commission’s “Premium Californian” target consumers say they buy avocados on at least half their shopping trips. This is an increase versus 2020 for both groups.

Awareness of California as an avocado growing region increased significantly again in 2021 to 47%, boosting overall awareness to 89%. California unaided and overall advertising awareness remains stable and at the highest levels to date. Despite an increase for Mexico, avocado advertising awareness between the two regions is comparable, which is notable because Mexico spends significantly more on advertising than California does. While Mexico’s association with all seasons increased significantly in 2021, California avocados significantly increased their strong association with summer to 79%, maintaining a big lead over Mexico.

Among avocado shoppers who have a preference for avocado origin, California continues to be the preferred growing



region among avocado shoppers in the state, the West region and in the U.S. overall (see chart). The Golden State fruit is perceived as the most premium, the best tasting, the freshest and the safest. About 74% of avocado shoppers throughout the country say it is important the avocados they buy are grown by California farmers; this is significantly higher in California at 81%. This measure had bumped up in 2020 and in 2021 it returned to prior levels.

Data indicated the importance of U.S.-grown produce and checking the fruit for the region where it was grown remain steady. Thus, encouraging consumers to check for the region where an avocado is grown remains an opportunity for differentiation. The biggest barrier to checking the region of the fruit was reported as price-based buying, with 45% of shoppers indicating they buy their avocados based on price. When checking to see what region an avocado comes from, respondents say they most often relied on the fruit's sticker.

Respondents also indicated California avocados are worth paying more for and noted that safe, sustainable growing conditions – which they deemed important characteristics – are worth the price. In fact, respondents indicated safe growing conditions continue to be as important as taste. Those surveyed indicated that growers keeping the water supply safe is the biggest perceived sustainability advantage for California avocados.

The Commission shares key information from its tracking studies with avocado handlers and customers, using highlights to encourage retailers to carry California avocados in season. Understanding consumer behavior and attitudes helps the

marketing team determine how best to communicate with target consumers, which in turn encourages brand loyalty and purchases of California avocados at a premium price.

Notes on the 2021 California Avocado Tracking Study Methodology

- 15-minute online surveys
- Sample sizes: California 535, other western states (Arizona, Colorado, Oregon, Utah and Washington) about 100 each for a total of 494; non-western markets 450; for the total U.S. the sample was weighted to be representative and the sample size was 574
- Statistical significance was reported at the 95% confidence level
- Sample qualifications:
 - Age 18+
 - 60% female, 40% male
 - Primary/shared grocery shoppers who had purchased avocados in the past year
- Unless otherwise noted, results listed are for the California region 🥑

