

2022 California Avocado Tracking Study Highlights

The California Avocado Tracking Study has been conducted regularly since the mid-1990s. The study helps the California Avocado Commission measure progress against some objectives and performance measures in the annual business plan and provides a wealth of information that helps the CAC Marketing team direct communications.

For the 2022 Tracking Study, from July 7 through August 7 nearly 1,400 avocado shoppers were interviewed from California, individual states in the West (Arizona, Colorado, Oregon, Utah and Washington), as well as in 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. The results were presented to the California Avocado Commission Board of Directors at their Board meeting on November 17, 2022 and the Marketing Committee on December 15, 2022.

Key Learnings from the 2022 California Avocado Tracking Study

Avocado purchasers buy avocados regularly: 66% of Californians and 74% of the Commission's "Premium Californian" targeted consumers report buying avocados on at least half their shopping trips. When choosing which avocados to purchase, consumers place two factors on par as the most important: being grown in safe conditions and expected taste.

Avocado buyers continue to prefer buying large avocados; however, in 2022 there was a directional (not statistically





GEOGRAPHIC COMPARISON Product Perceptions

1

California Avocados continue to be viewed as superior vs. Mexico for “being the best” and “worth paying more for” in most Western states but are seen as comparable in the total US.



Base: Total 2022, CA (n=502), AZ (n=103), CO (n=102), OR (n=101), UT (n=102), WA (n=99), Total US (n=499)
 Q1. How would you like to think about [California Avocados/Avocados from Mexico]? How much do you agree or disagree that the statement describes [California Avocados/Avocados from Mexico]?

Green percentages indicate significantly higher than 2021
 ▲ California significantly higher than Mexico 2022



CALIFORNIA MARKET Region Awareness

Total awareness of California Avocados held steady and continues to be on par with Mexico.

Unaided awareness however is now lower for California than Mexico.



Base: Total California 2020 (n=505), 2021 (n=503), 2022 (n=502)
 Q1. When you think of avocados, what brand names or growing regions come to mind?
 Q3. Which of the following avocado growing regions have you heard of?

▼ California is significantly lower than Mexico 2022

significant) increase in preference for small avocados. While avocado buyers say they prefer to buy single avocados, regardless of size, 78% of Californians say they also buy bagged avocados. Two-thirds of respondents say they would be “a lot” or a “little more” likely to buy a bag of avocados if California was on the label.

In 2022, for the first time, Mexico is the preferred avocado origin in the U.S. overall. In recent years Mexico has been gaining consumer preference in the total country but had not yet surpassed preference for California. This development is somewhat expected considering that California avocados are usually not in distribution in much of the country outside the Western region and California marketing is focused on those targeted consumers, whereas Mexico has year-round distribution and marketing throughout the U.S.

In California and the West region, California avocados exceed Mexico and all other origins on positive product perceptions. While consumers state that California avocados are the most expensive, 59% state they are worth paying more for and 65% of Californians say California avocados are the best. About 51% of avocado shoppers in California say it is important that the avocados they buy are grown by California farmers.

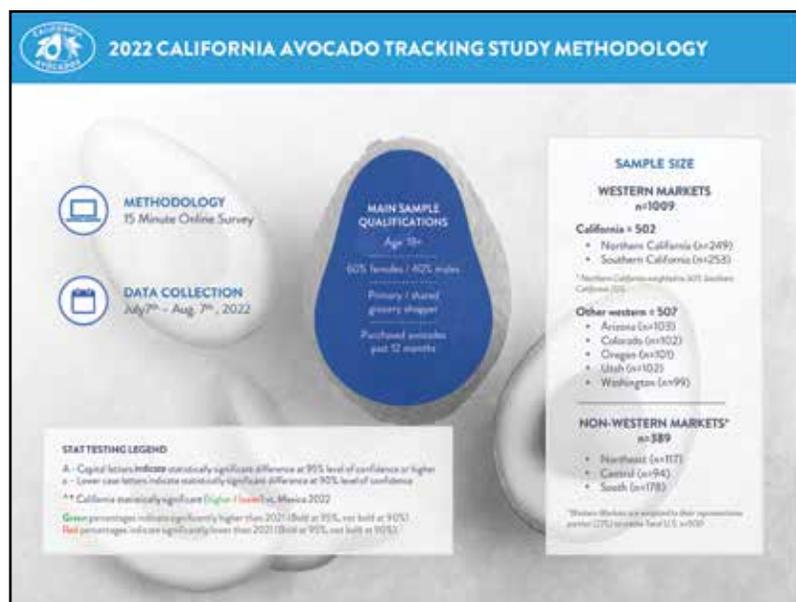
Certain sustainability factors are very important to

consumers when considering their avocado purchases. The following percentages of respondents said it is extremely or very important that:

- growers protect the water supply to help keep it safe (81%)
- harvesters and other workers are treated fairly (79%)
- growers use water responsibly (78%)

There is a gap between the importance consumers place on many sustainability attributes and the percentage of consumers who believe these statements are true for California avocado growers. While consumers’ perceptions that California avocado sustainability practices exceed those for avocados from Mexico, the percentage of respondents who associated sustainability with California avocado growers typically ranged from 50% to 60%, indicating there may be an opportunity to improve in this area.

Insights from the Tracking Study also are shared with avocado handlers and customers to encourage retailers to carry California avocados and promote their origin during the peak season. Understanding consumer behavior and attitudes helps the CAC Marketing team develop messaging that will resonate with target consumers, which in turn encourages brand loyalty and purchases of California avocados at a premium price. 🥑



Notes on the 2022 study methodology

- The surveys were 15-minute online surveys
- Sample sizes: California 502, the other Western states at about 100 each for a total of 507; non-western markets 398; for the total U.S. the sample was weighted to be representative and the sample size was 500
- 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