

2020 California Avocado Tracking Study Highlights

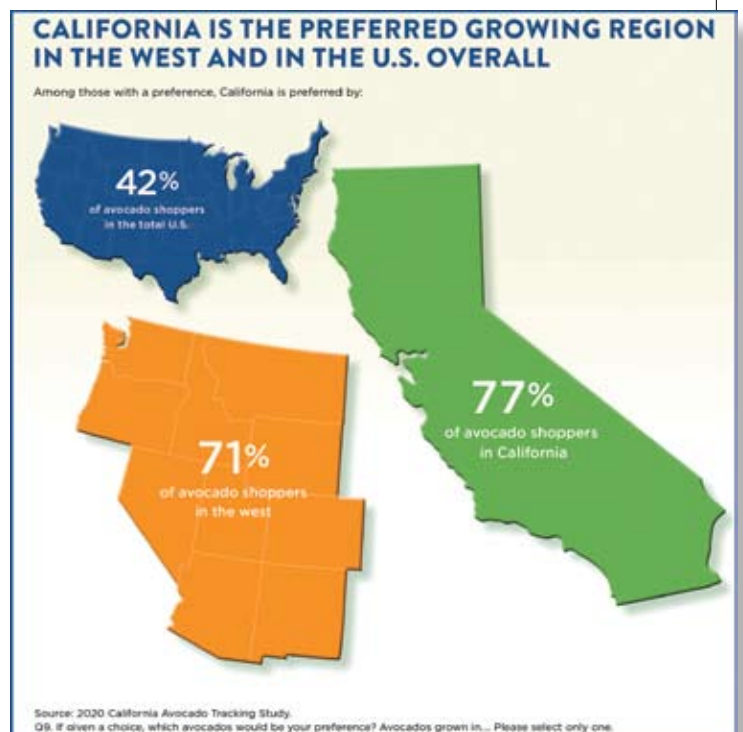
The California Avocado Tracking Study has been conducted regularly since the mid-1990s, traditionally every year. The consumer tracking study results help the California Avocado Commission set objectives and performance measures in the annual business plan, some of which are measured by the tracking study results. It also provides a wealth of information that helps the marketing team direct consumer communications.

For the 2020 tracking study, surveys were conducted from August 13 through September 3, and the results were presented to the Commission Board at its November 18 CAC Board Meeting. More than 1,400 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.

Key 2020 California Avocado Tracking Study Learnings

- Avocado purchasers buy avocados fairly regularly: 67% of Californians and 81% of the Commission's "Premium Californian" target consumers say they buy avocados on at least half their shopping trips
- The main reasons consumers buy avocados are for their taste and health benefits
- Being grown in safe conditions is the most important factor avocado shoppers say they consider when choosing which avocados to purchase; expected taste is the second most important factor
- California is the preferred growing region among avocado shoppers in California, the West region and in the U.S. overall (see chart)

- California exceeds Mexico and all other origins on positive product perceptions among avocado shoppers in California and the total U.S. (see chart)
 - 65% of Californians and 53% of avocado shoppers in the U.S. say California avocados are the best
 - While consumers state that California avocados are the most expensive, 53% of Californians and 50% of avocado shoppers in the U.S. say they are worth paying more for

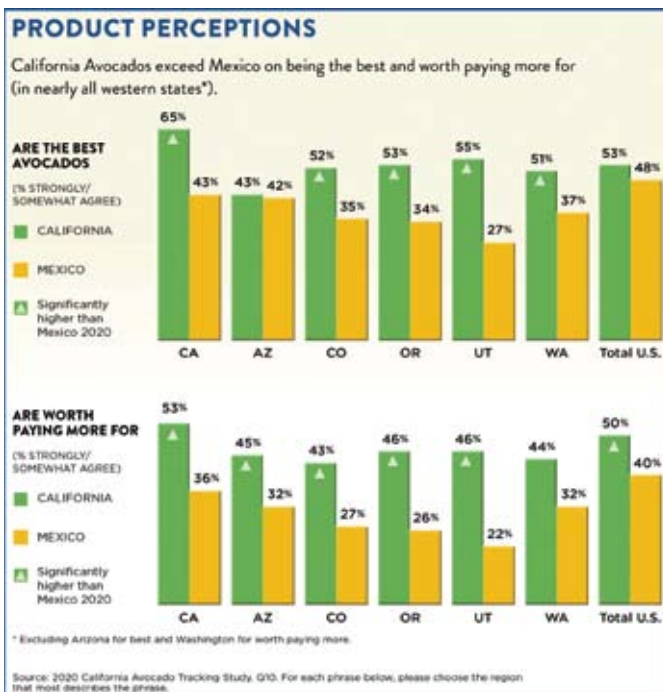


- Unaided awareness of California avocados increased significantly in 2020 to 39%, boosting overall awareness to 83%
- California avocado unaided advertising awareness also increased significantly to 24%, and overall advertising awareness increased to 47%; this is on par with Mexico, which is notable because Mexico's advertising spending is significantly higher than California's
- About 80% of avocado shoppers throughout the country say it is important that the avocados they buy are grown by California farmers; this is significantly higher in California at 86% (see chart)

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

Notes on the 2020 California Avocado Tracking Study Methodology

- 15-minute online surveys
- Sample sizes: California 505, other western states (Arizona, Colorado, Oregon, Utah and Washington) about 100 each for a total of 502; non-western markets 405; for the total U.S. the sample was weighted to be representative and the sample size was 530
- 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 🥑



- In 2020 the Commission asked consumers about COVID-19 and if it had any impact on their purchases of avocados, finding that:
 - about 20% said they are buying more avocados; the two main factors are that avocados are comforting and they perceive avocados to be healthy/nutritious and they are more concerned about their health
 - COVID-19 has not affected checking for region for most avocado buyers, but about 35% say they are more likely to check. Among those shoppers 62% say they want to support local/U.S. farmers as much as possible, 59% say they want to help the U.S. economy and 55% say they know the U.S. has the best food safety practices

