

Australian Avocado Consumer Research

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Avocados Australia Limited

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AV04015

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PROJECT Avocado

Bread & Butter Research & Planning

Final Version



Overall Project objectives

- **From your brief, this research is intended to :**
 - Provide an up-to-date analysis of the critical factors affecting purchase and consumption of avocados among both consumers and those in the food industry
 - Identify potential opportunities for further development of current markets, and growth of new / previously unknown segments
 - Feed into and make programme recommendations, based on the research findings (identifying the most cost effective methods to take forward)

Project objectives

- These fall into four key areas as listed below...

1. Role of fruit & vegetables in general

2. Avocado purchasing
-who is and isn't purchasing
-and how, when, why, where etc

3. Attitudes towards & usage of Avocados

4. Avocado positioning
-current perceptions
-optimisation & communication of
positioning into future

Today's quantitative presentation...

- **Focus on providing a foundation of learning which will also be a benchmark for future research...**

2. Avocado purchasing
-who is and isn't purchasing
-and how, when, why, where etc

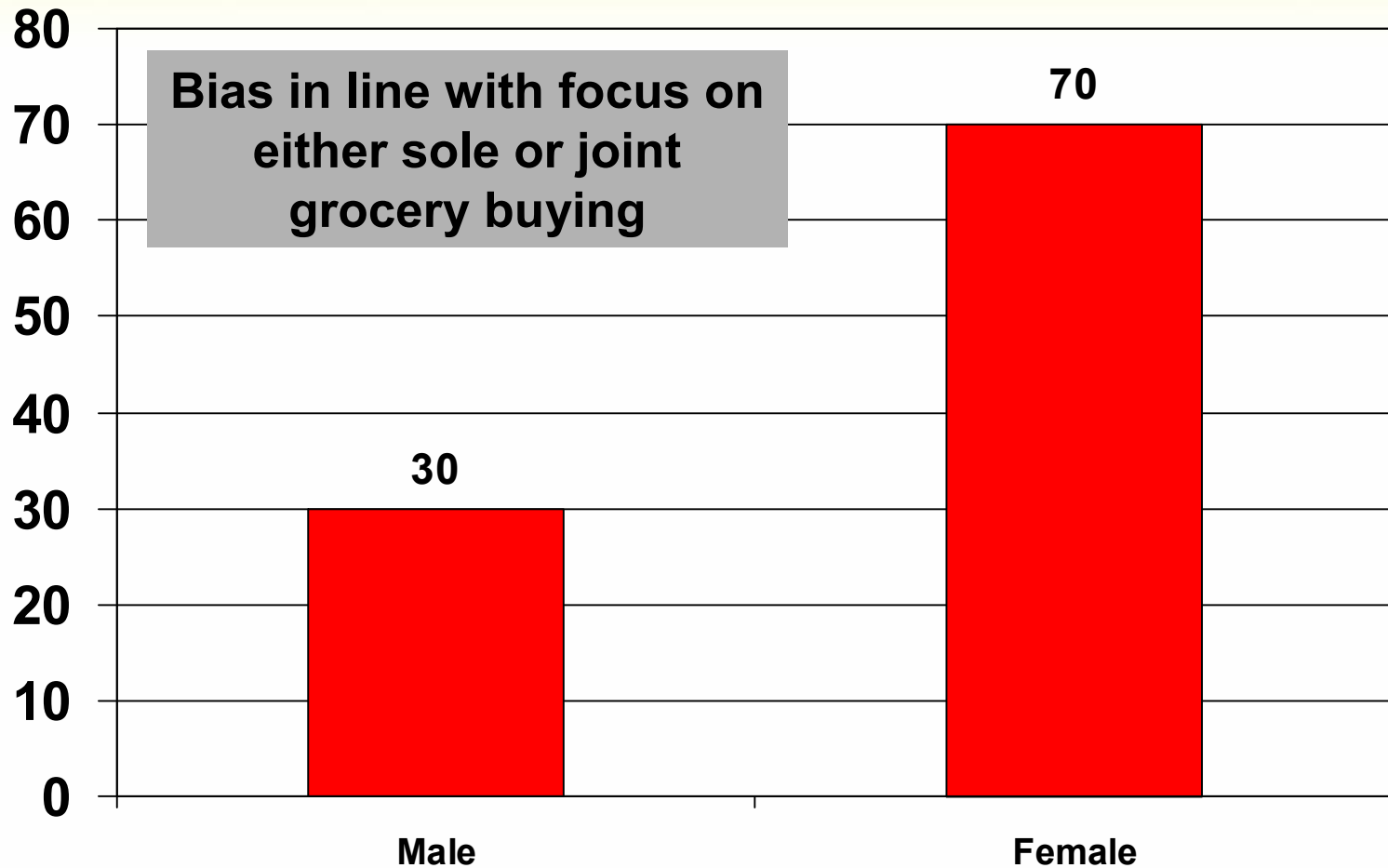
3. Attitudes towards & usage of Avocados

Quantitative Methodology

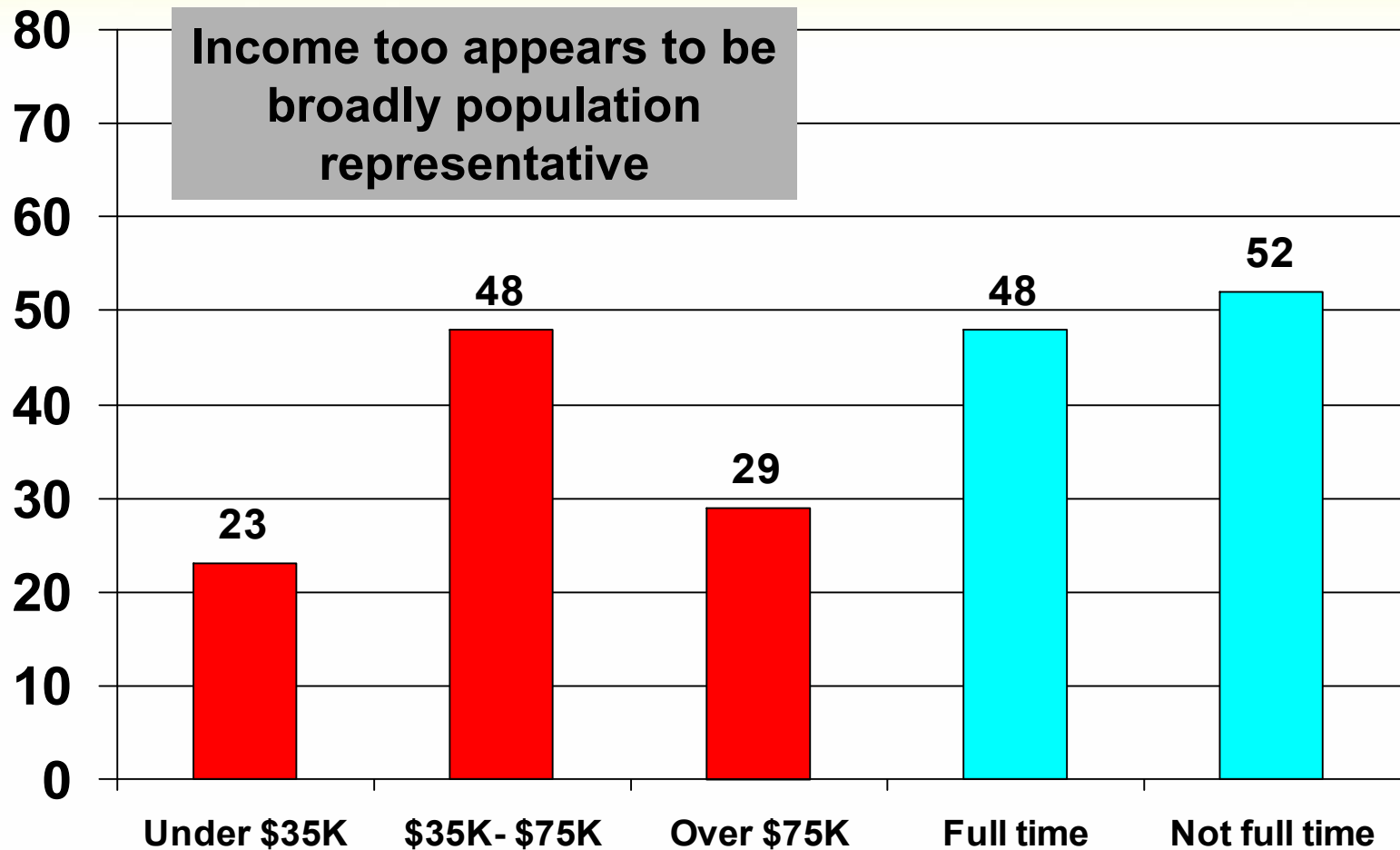
- **On-line survey of 10 minutes duration amongst a sample of 1,000**
- **National spread**
- **All grocery buyers**
- **Fieldwork dates 3rd June to 7th June (recontacted 28th June to 3rd July)**

Demographics

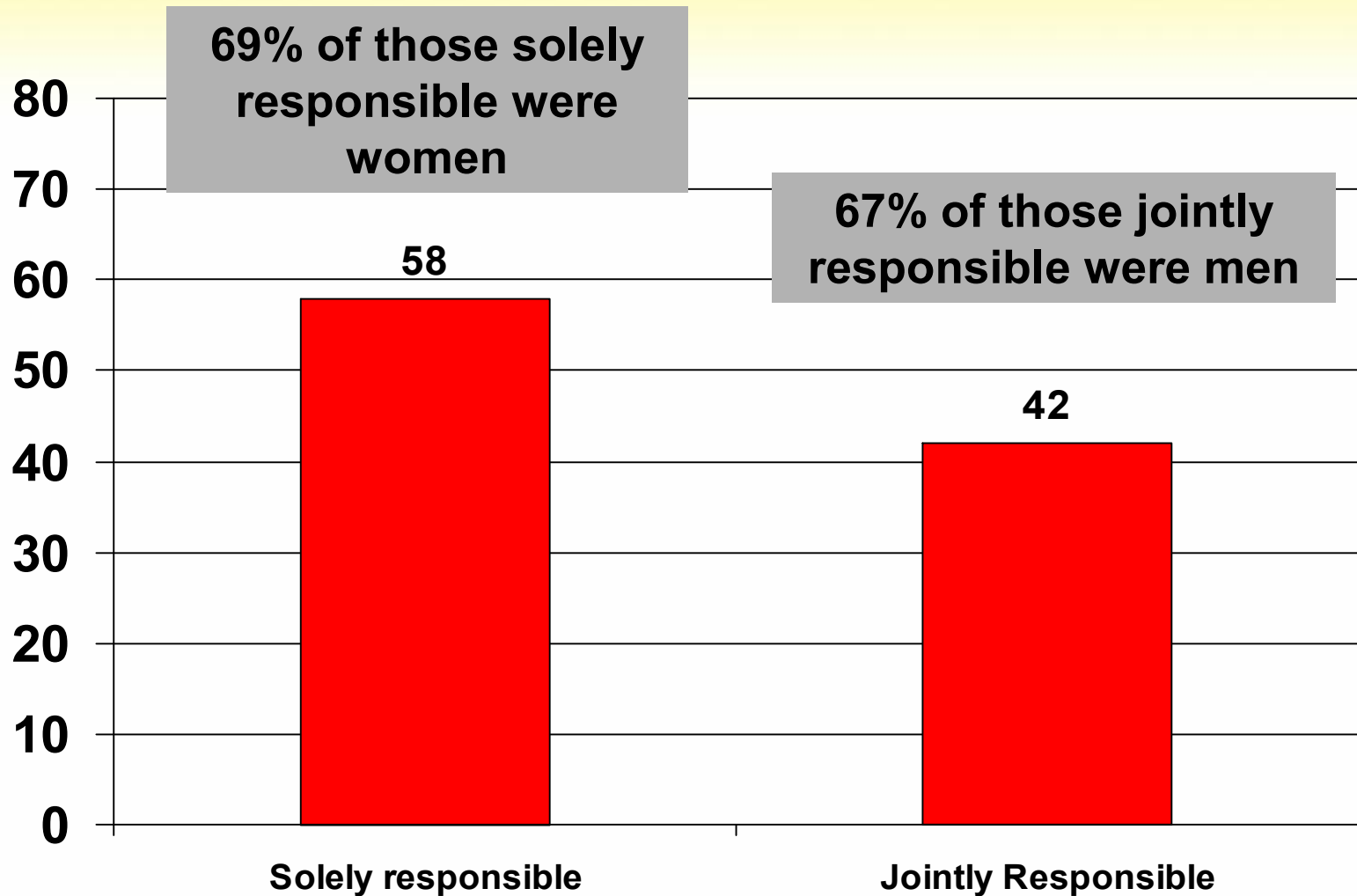
Demographics - Sex: All respondents



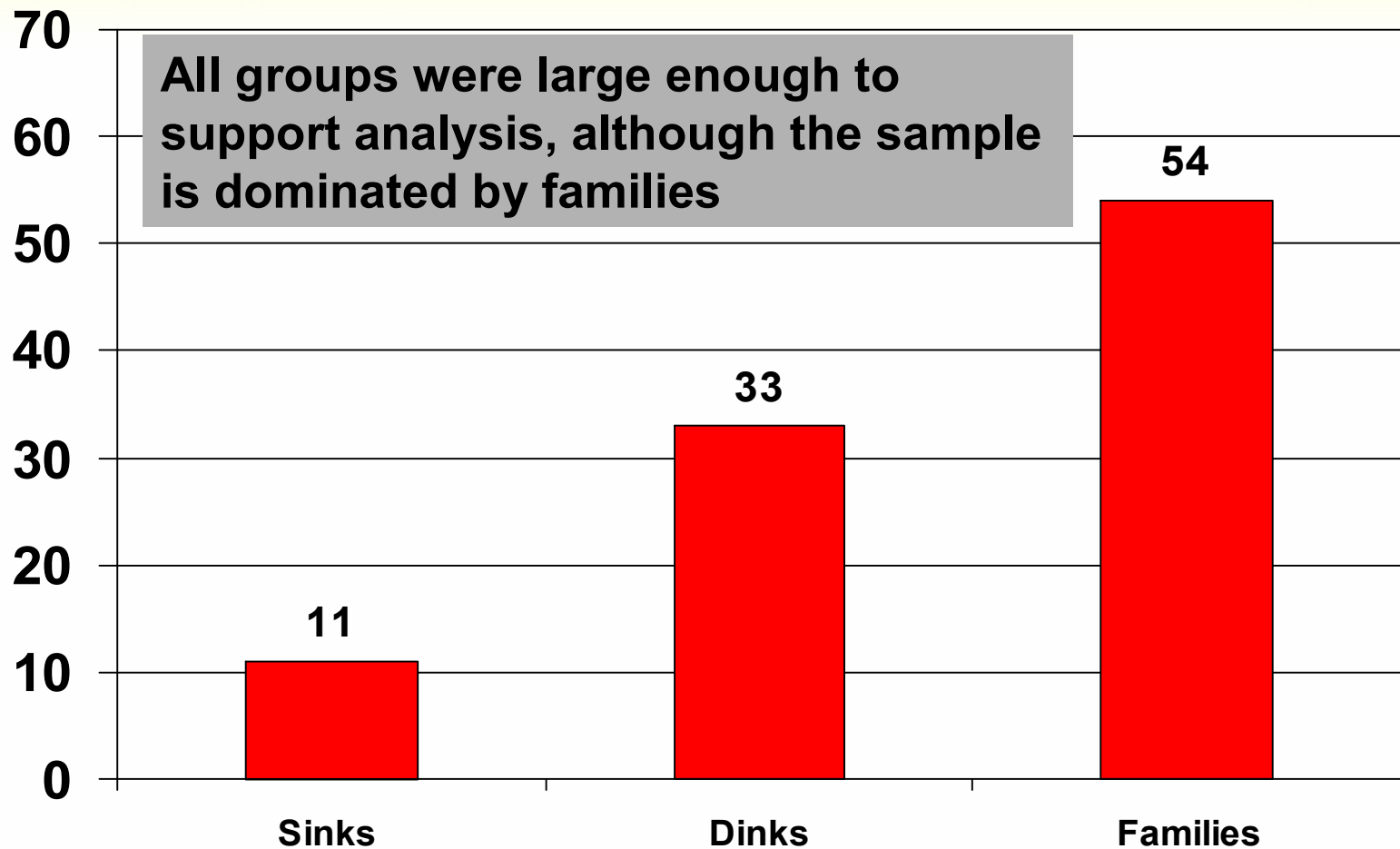
Demographics - Age: All respondents



Demographics - Shopping involvement: All respondents

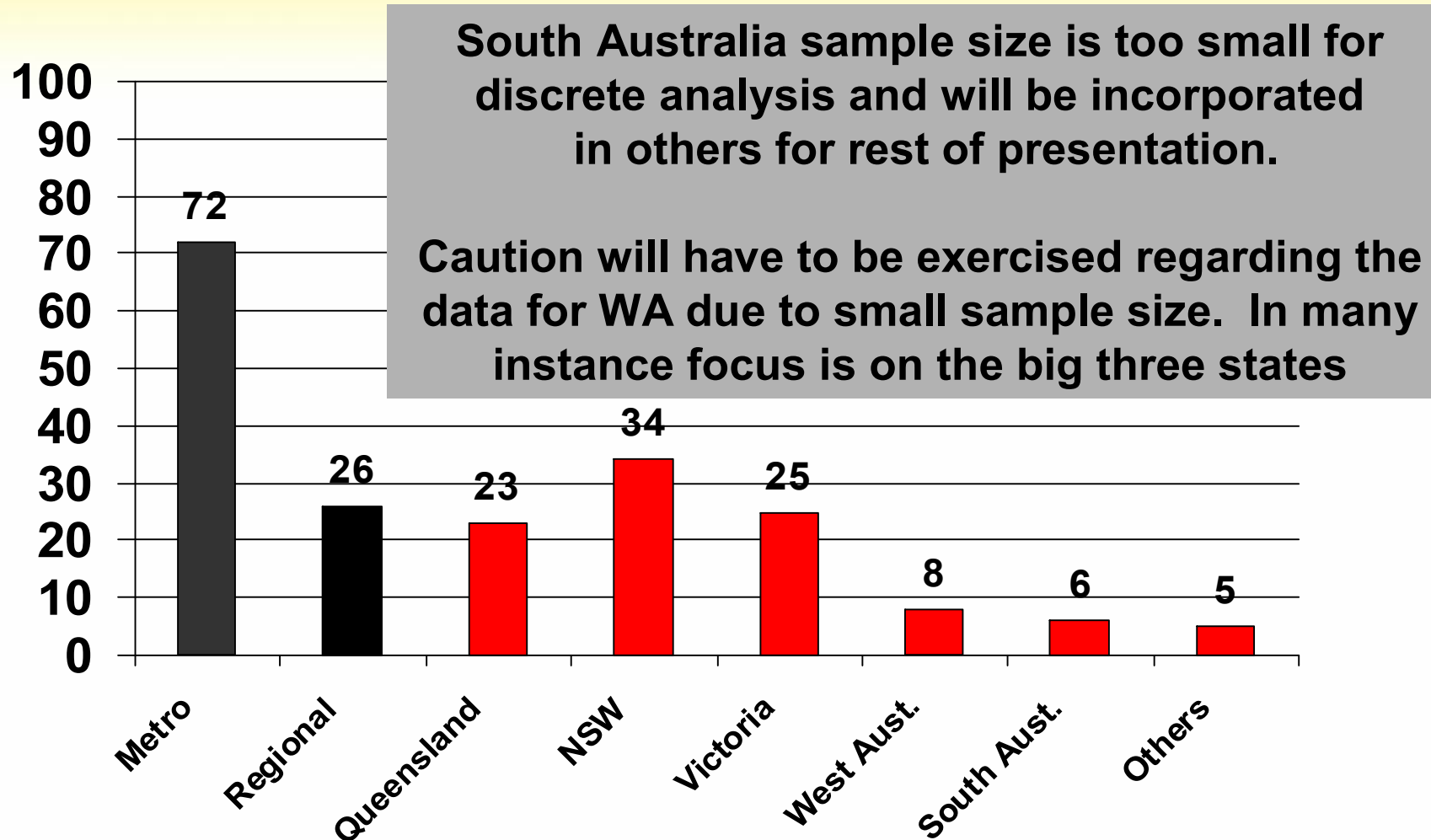


Demographics - Family Status: All respondents



Demographics - Geographic Distribution:

All respondents



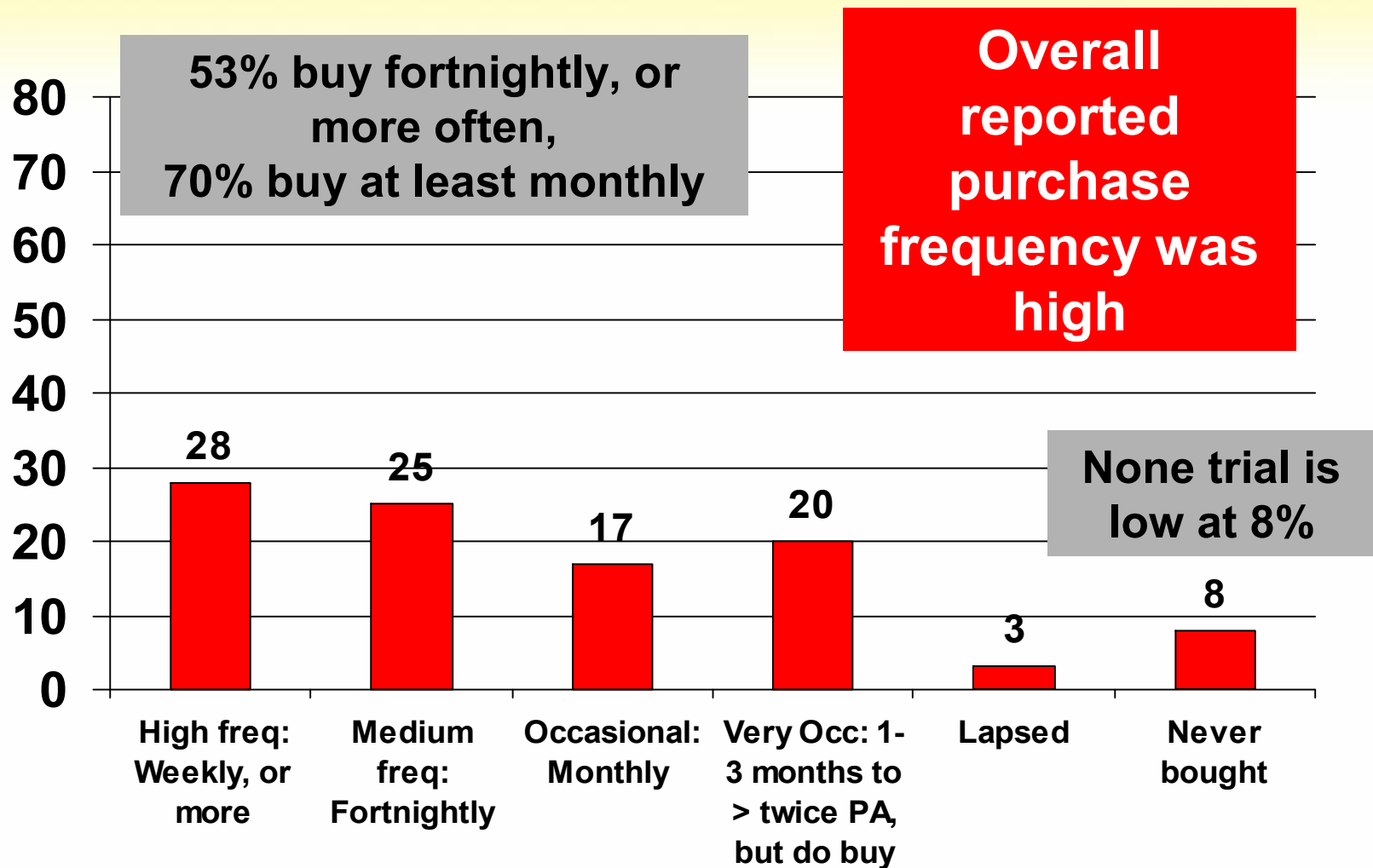
Note: Metro v Regional
not captured for 21
respondents

Base: 1,000

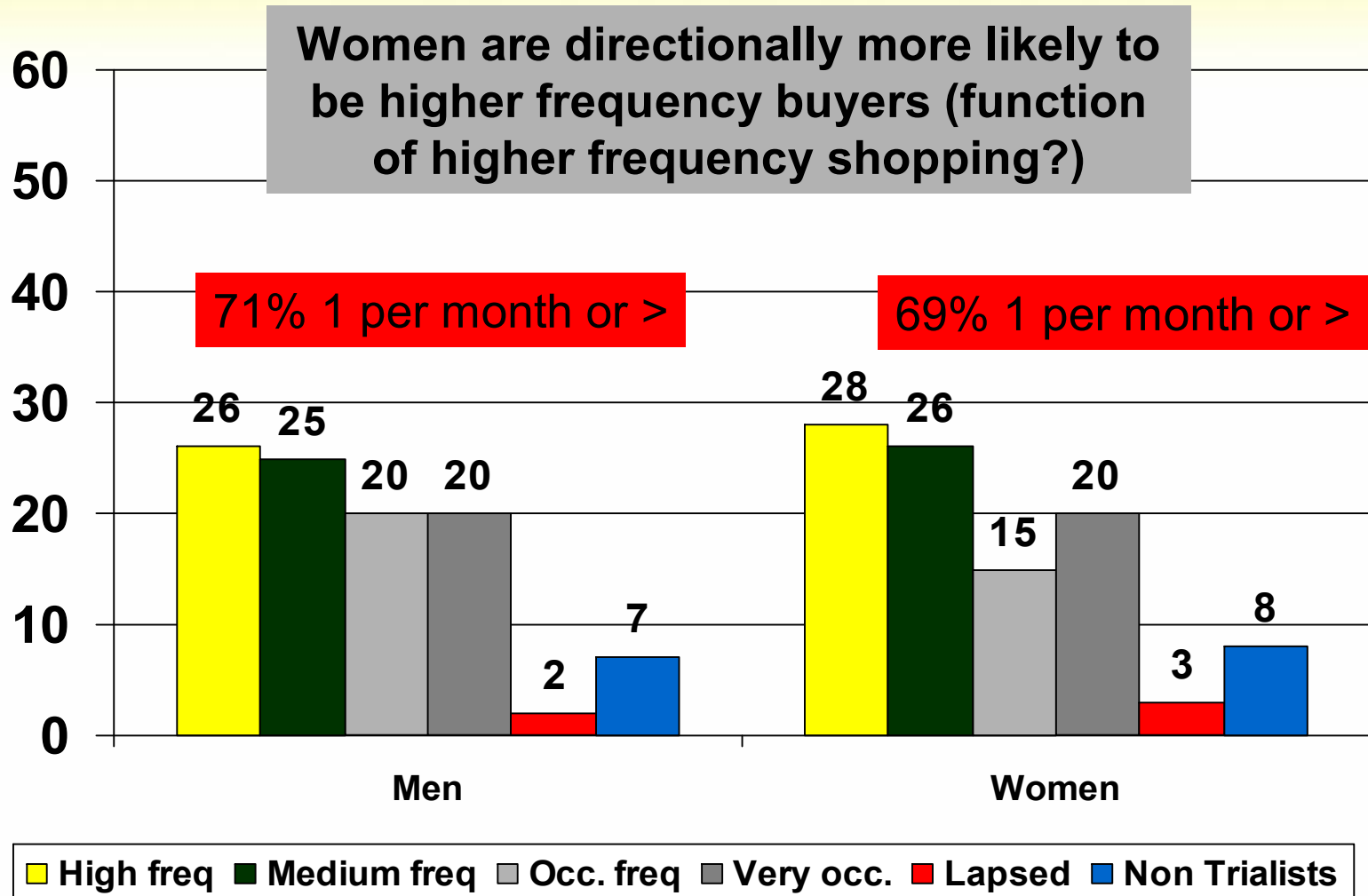


Avocado purchasing

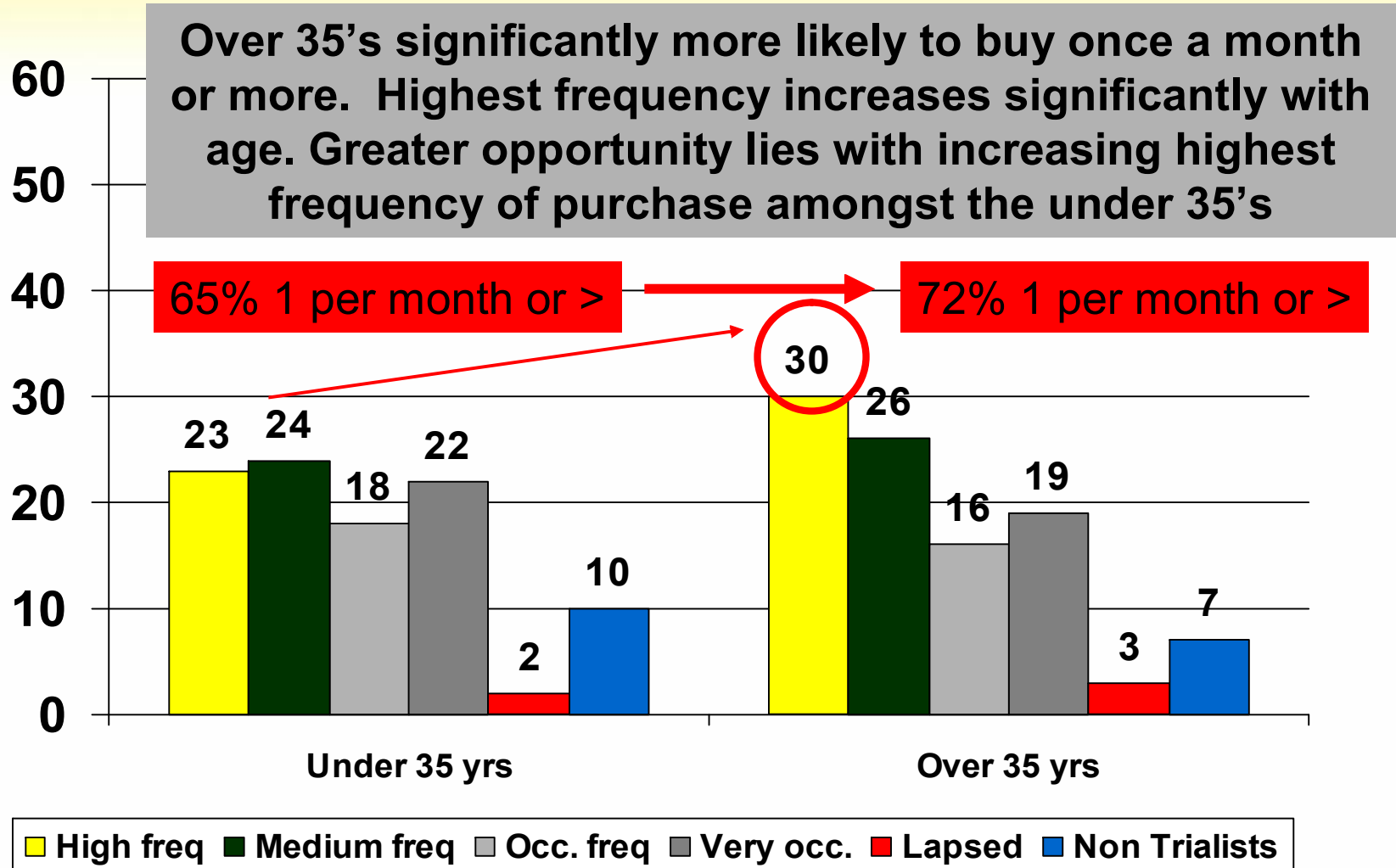
All Avocado Purchase Frequency: All respondents



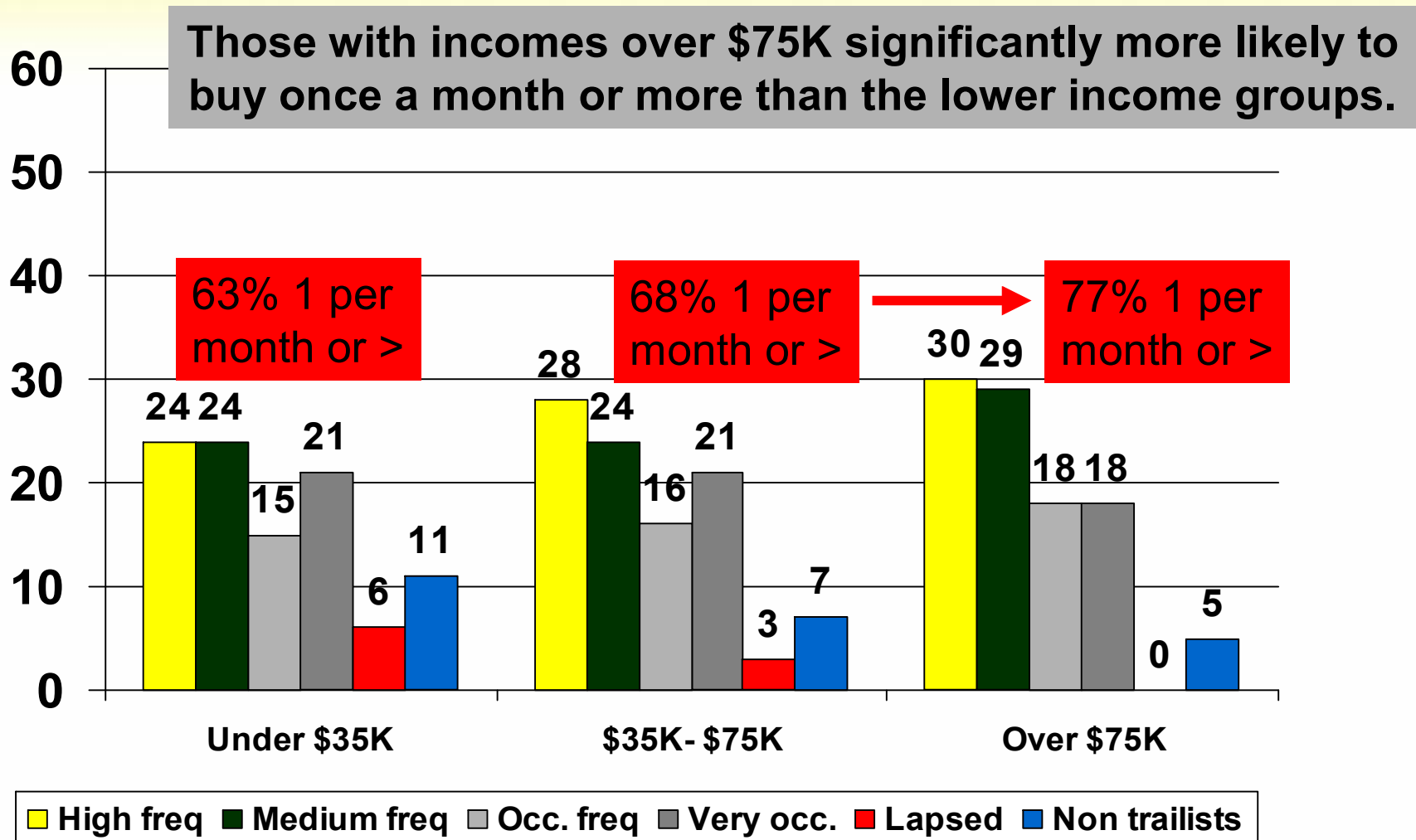
All Avocado Purchase Frequency Profile of Sex: All respondents



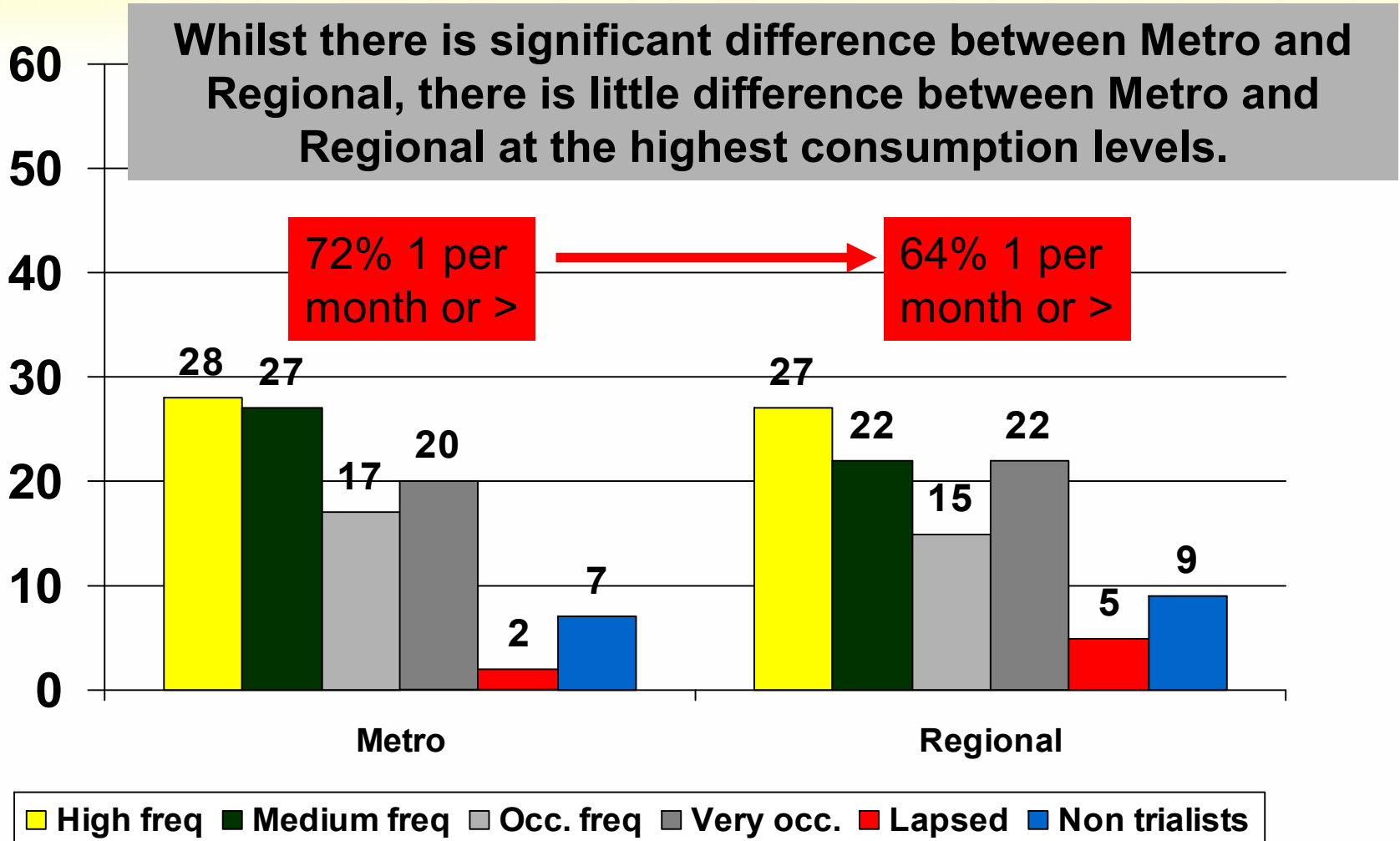
All Avocado Purchase Frequency Profile of Age: All respondents



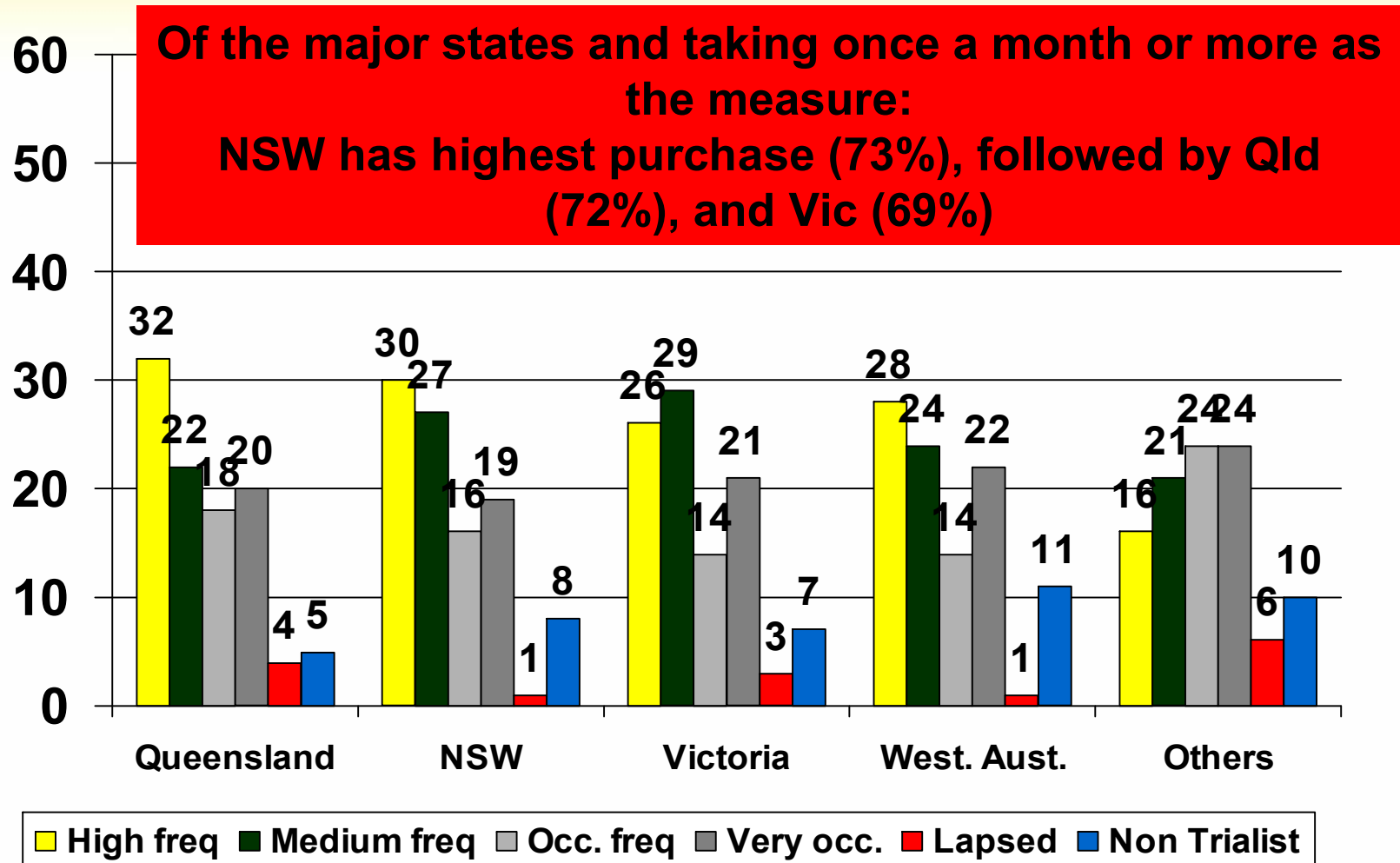
All Avocado Purchase Frequency Profile of income: All respondents



All Avocado Purchase Profile by Metro Vs Regional: All respondents



All Avocado Purchase Frequency by State: All respondents

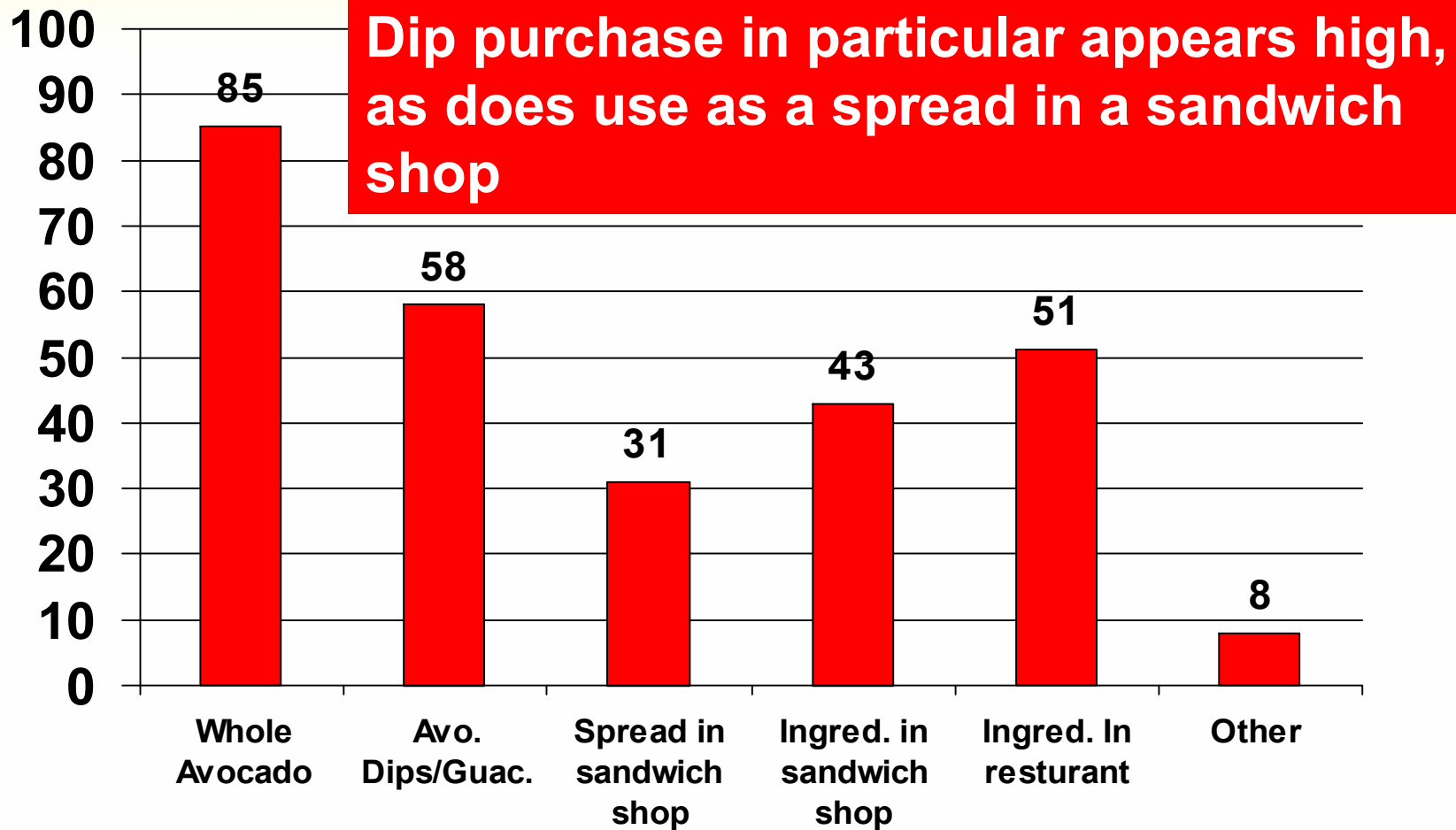


All Avocado Purchasing Summary

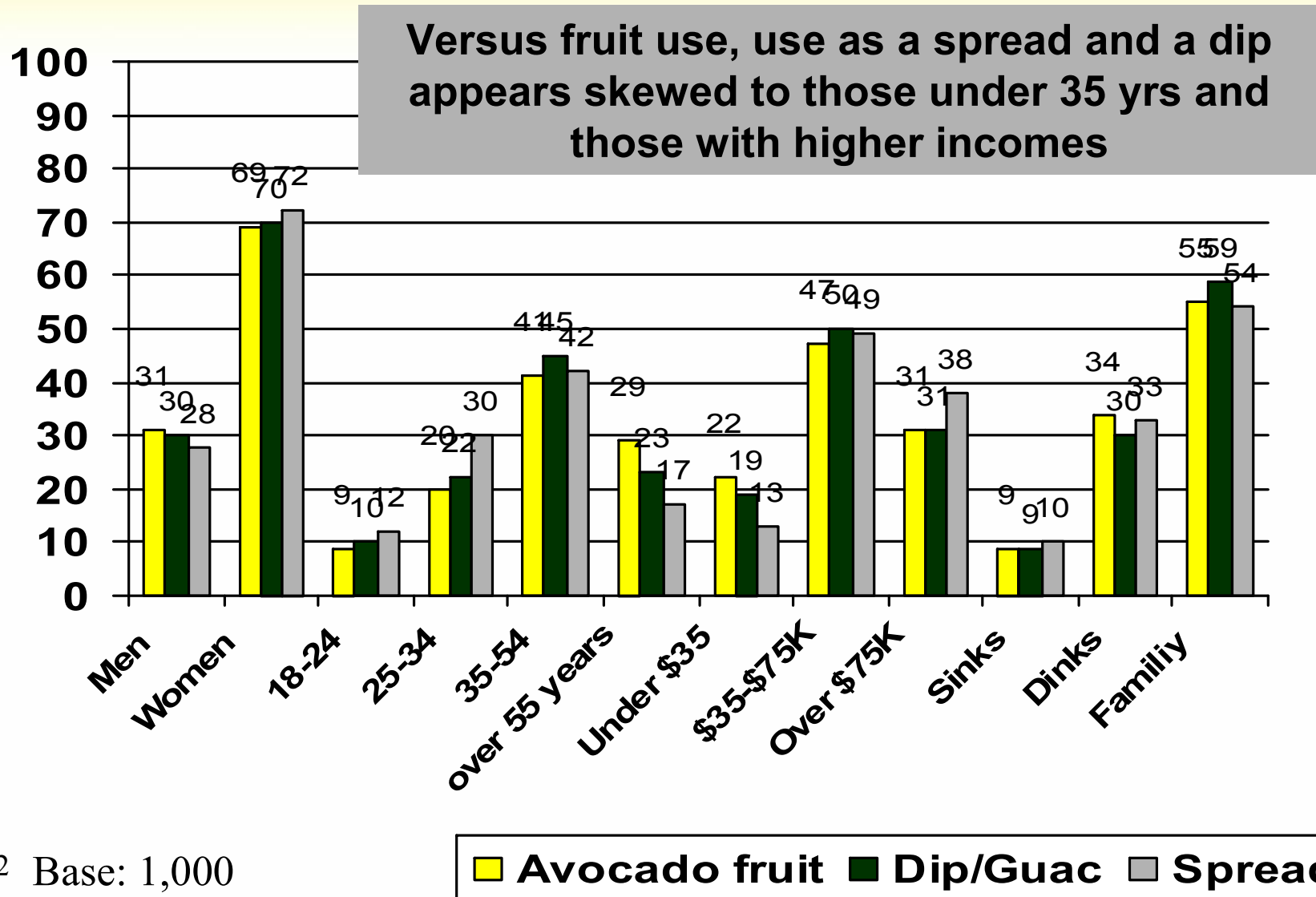
- **Overall purchasing appeared very frequent, over half (53%) buy fortnightly or more often, and over 2/3rds (70%) buy at least monthly**
- Highest frequency of purchasing exists amongst:
 - Those over 35 years
 - With highest incomes
 - Living in Metro areas
 - Living in NSW
- **Greatest opportunity lies with:**
 - Those under 35 yrs, with lower income, and in terms of the bigger states eg. Victoria

Format of Purchase

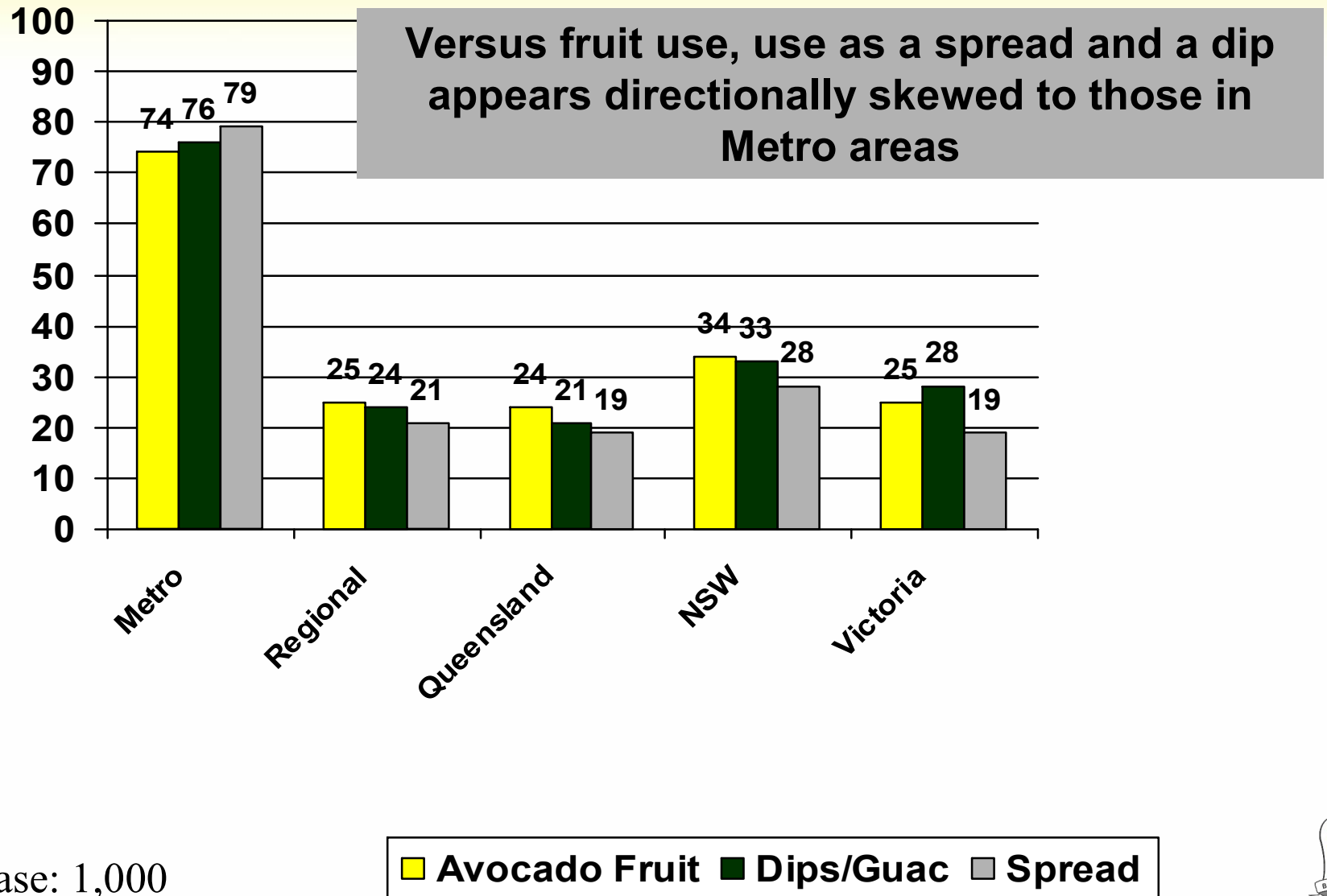
Purchase format: All respondents



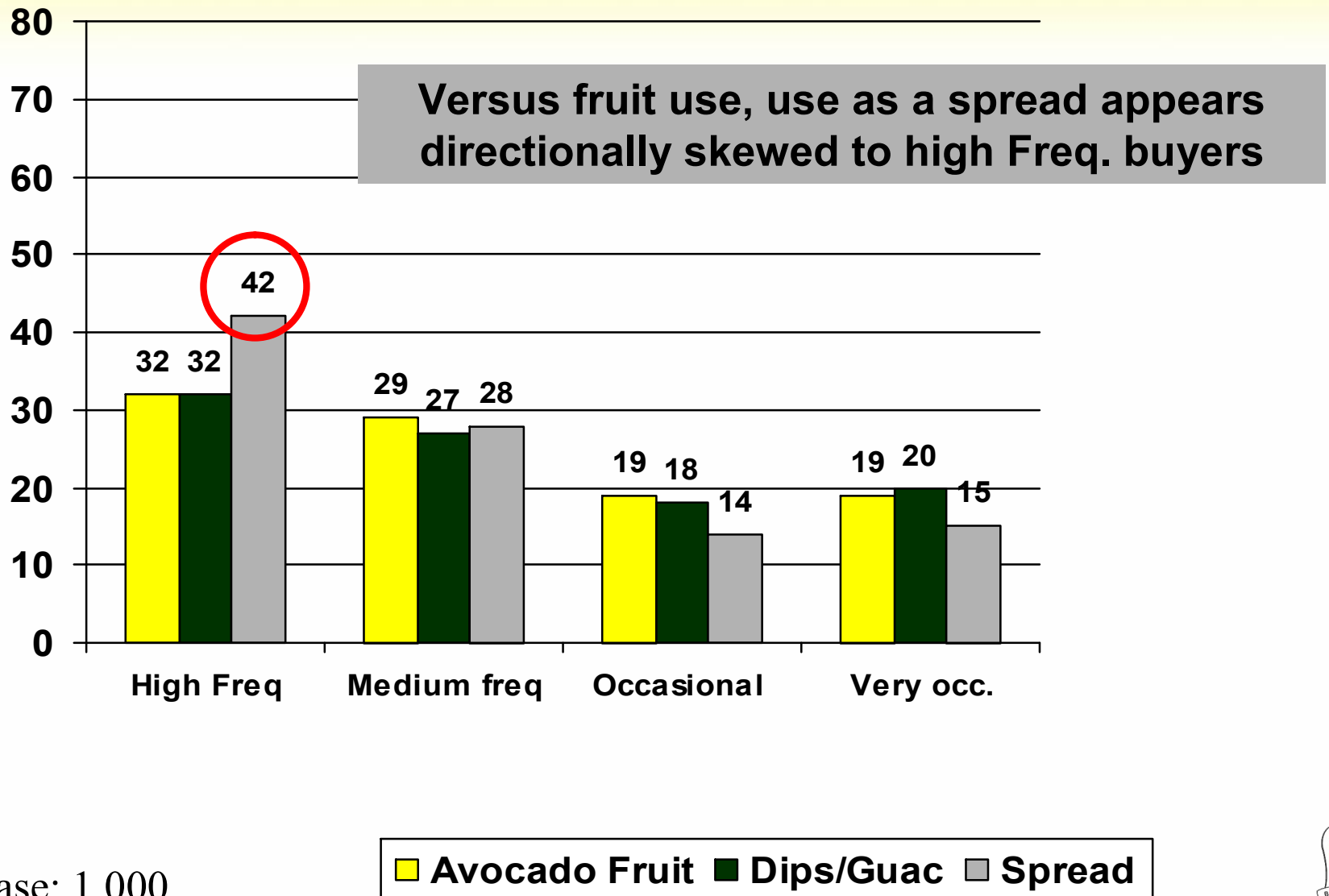
Format profiles: All respondents



Format profiles: All respondents



Format profiles: All respondents

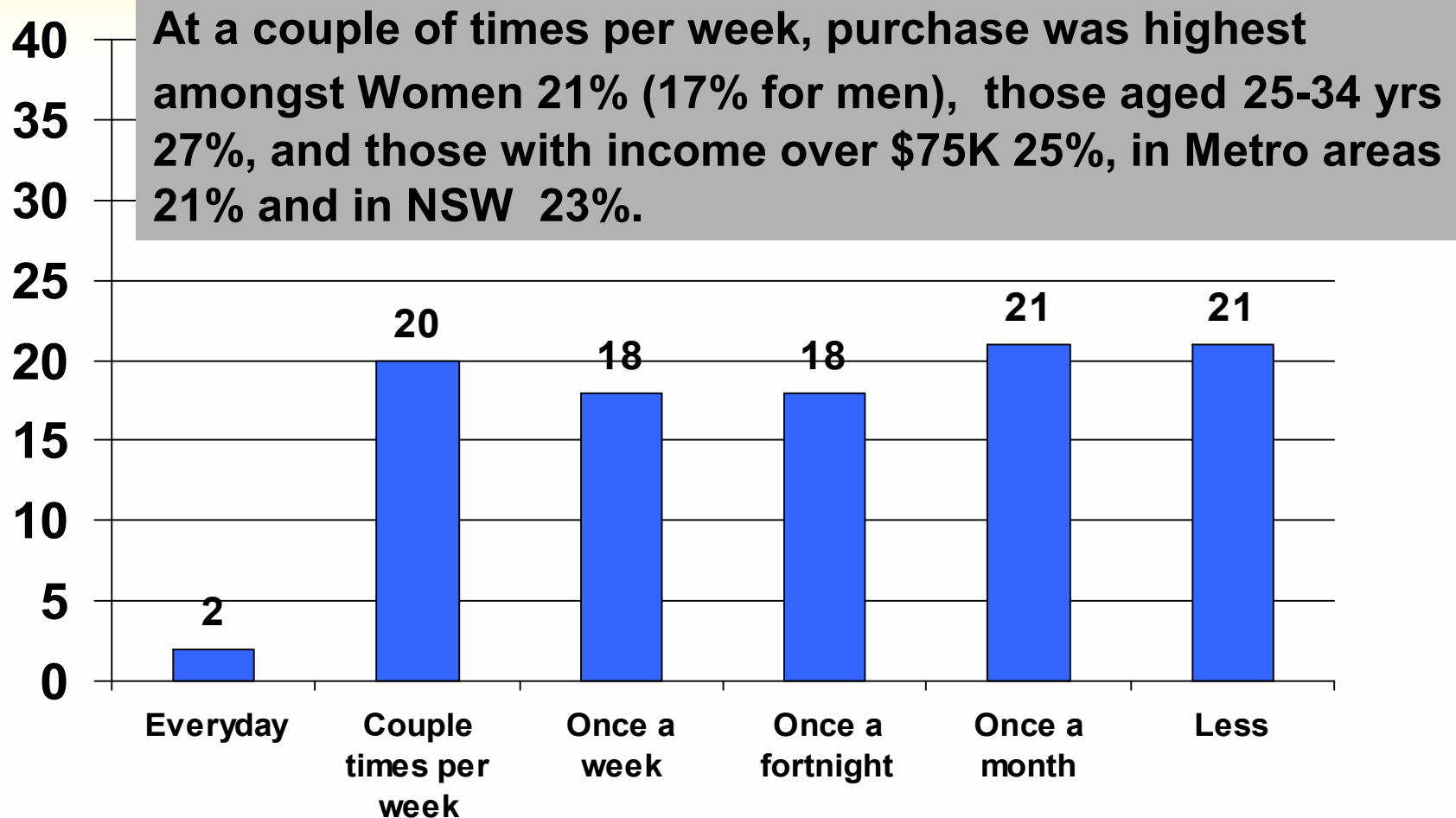


Purchase Format Summary

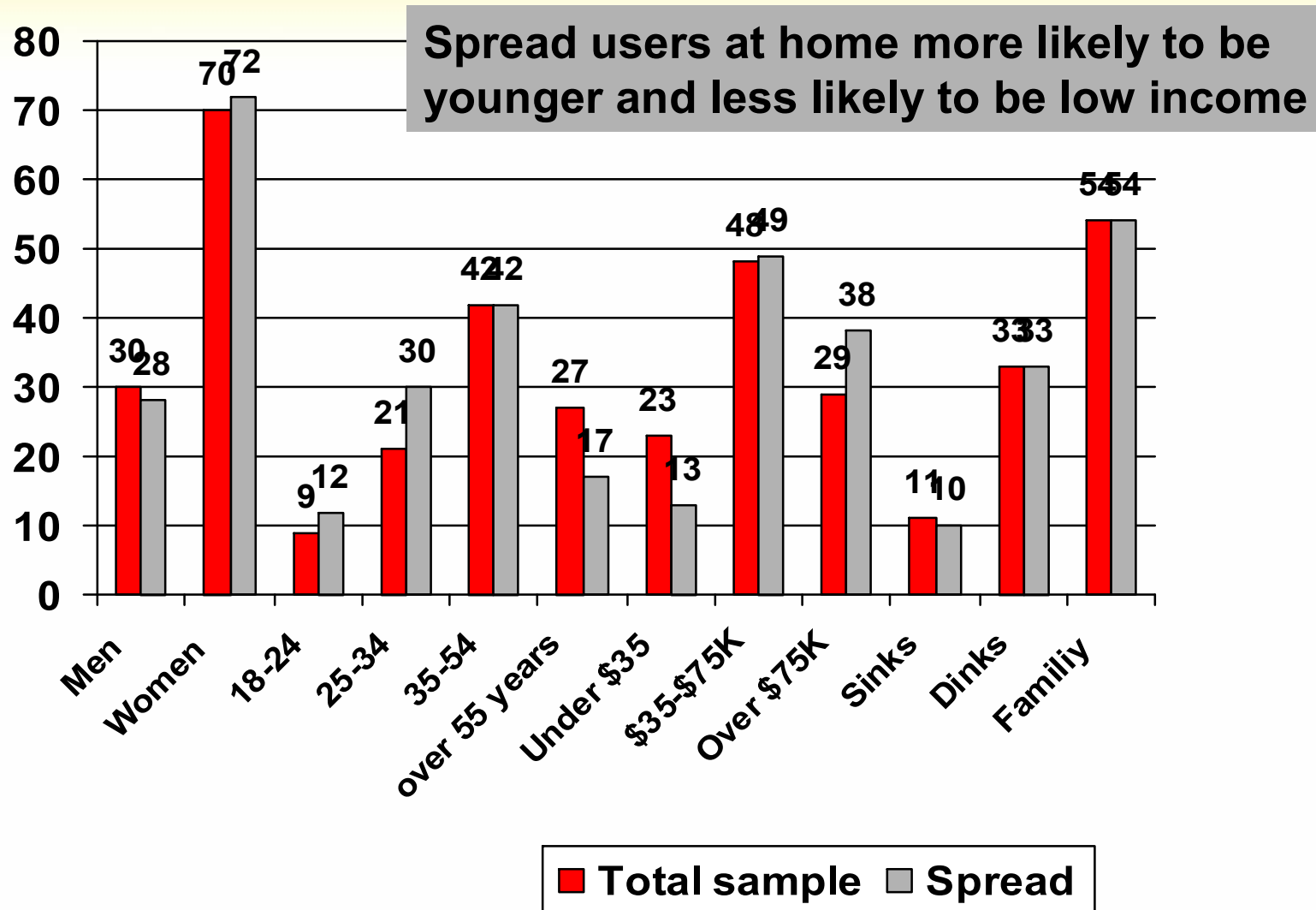
- Not only was the penetration of fruit high (85%), purchase as a dip or as an ingredient (either at a restaurant or an ingredient in a sandwich shop), was also strong (58%, 51%, 43% respectively).
- Indeed, also nearly a third had bought avocado as a spread in a sandwich shop (31%)
- Versus fruit use, use as a spread & a dip was skewed to those under 35 and with higher incomes
- Use as a spread was significantly more prevalent amongst high frequency purchasers

Spread Purchase

Purchase Frequency as a Spread: All buying as a spread in a sandwich shop

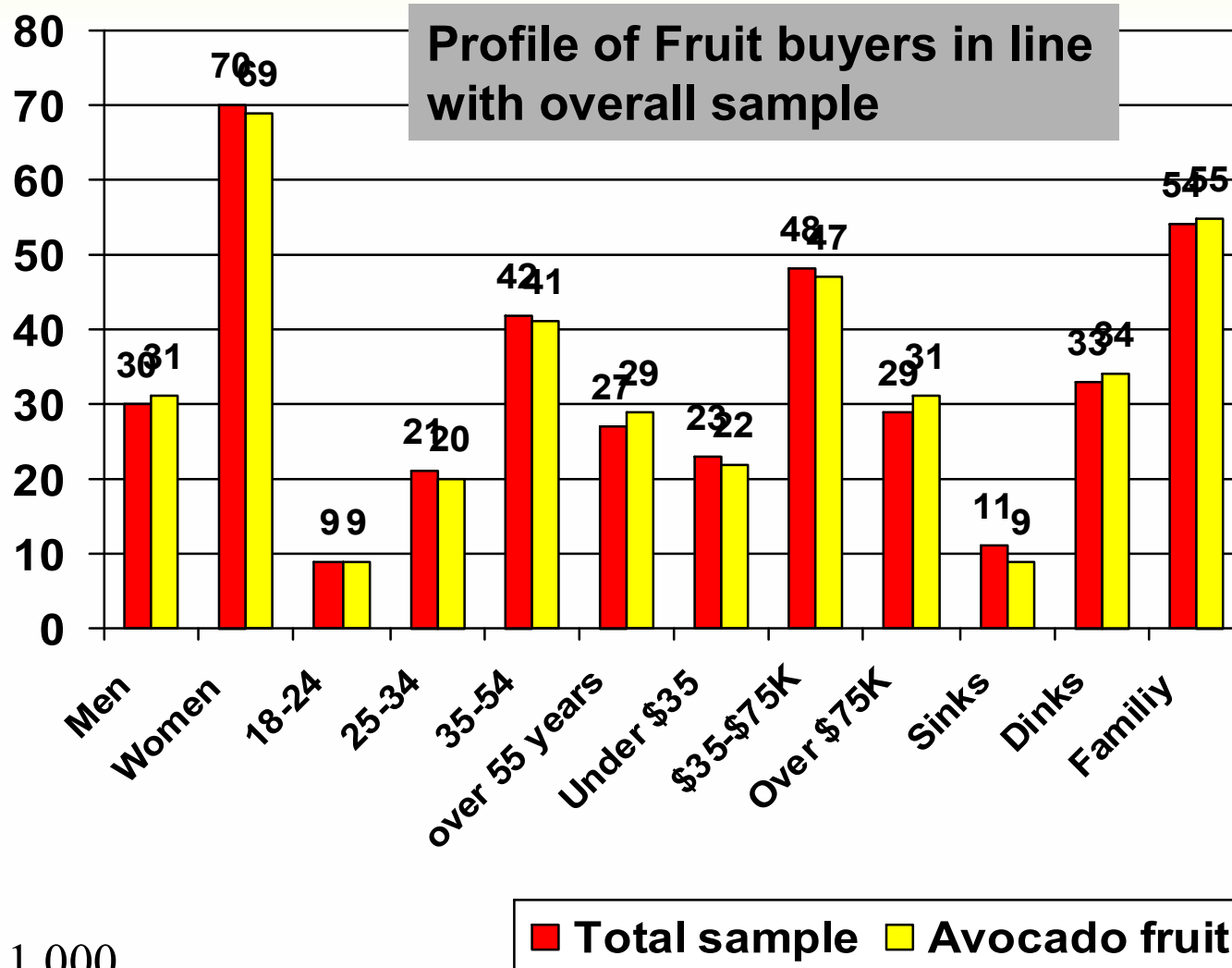


Format profiles - Spread users at home: All respondents

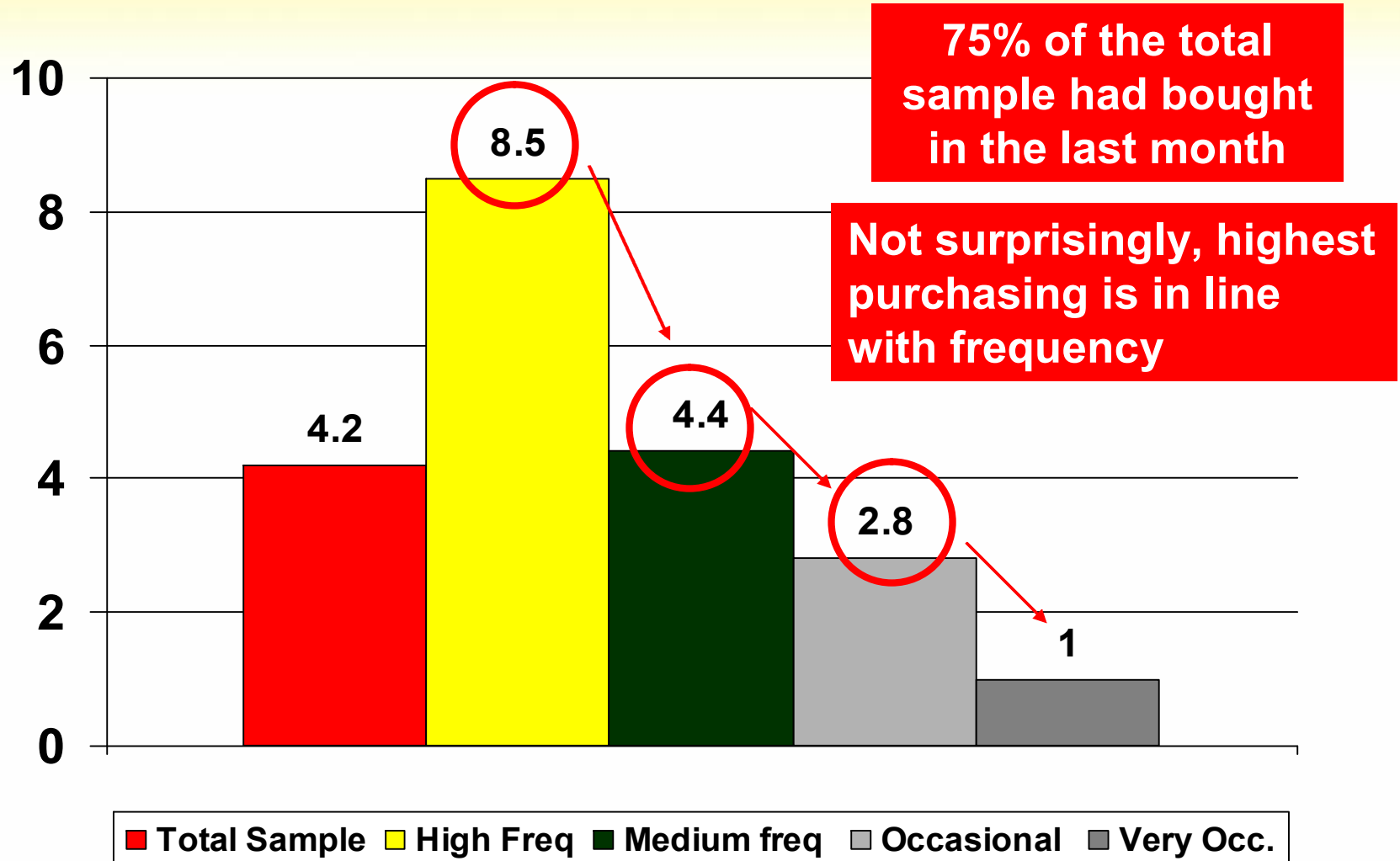


Fruit Purchase

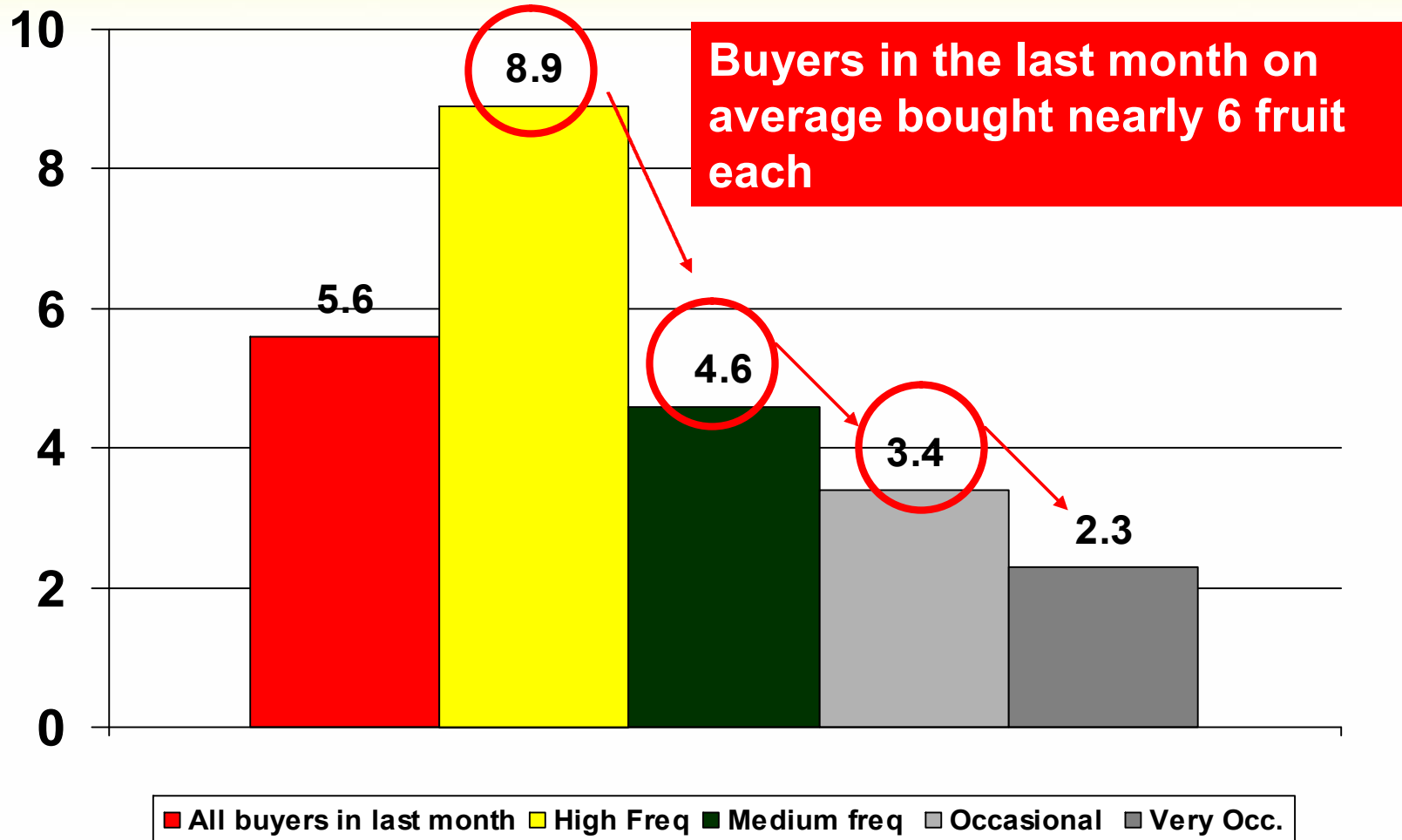
Format profiles - Fruit buyers: All respondents



Average number of Fruit Purchased in last month by Frequency of purchase: All respondents - on recontact

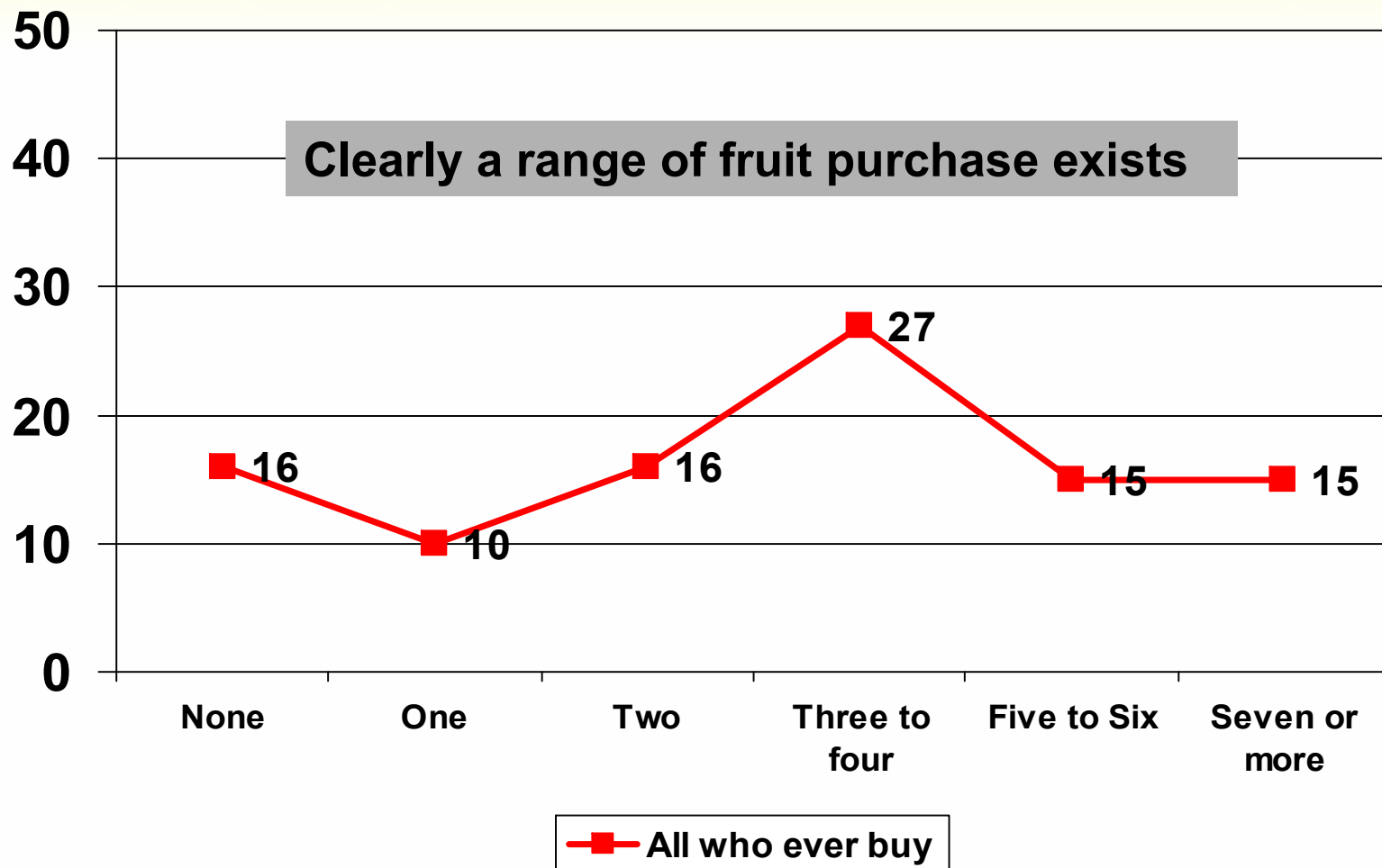


Average number of Fruit Purchased in last month by Frequency of purchase: All buyers in the last month - on recontact



Number of fruit purchased in last month:

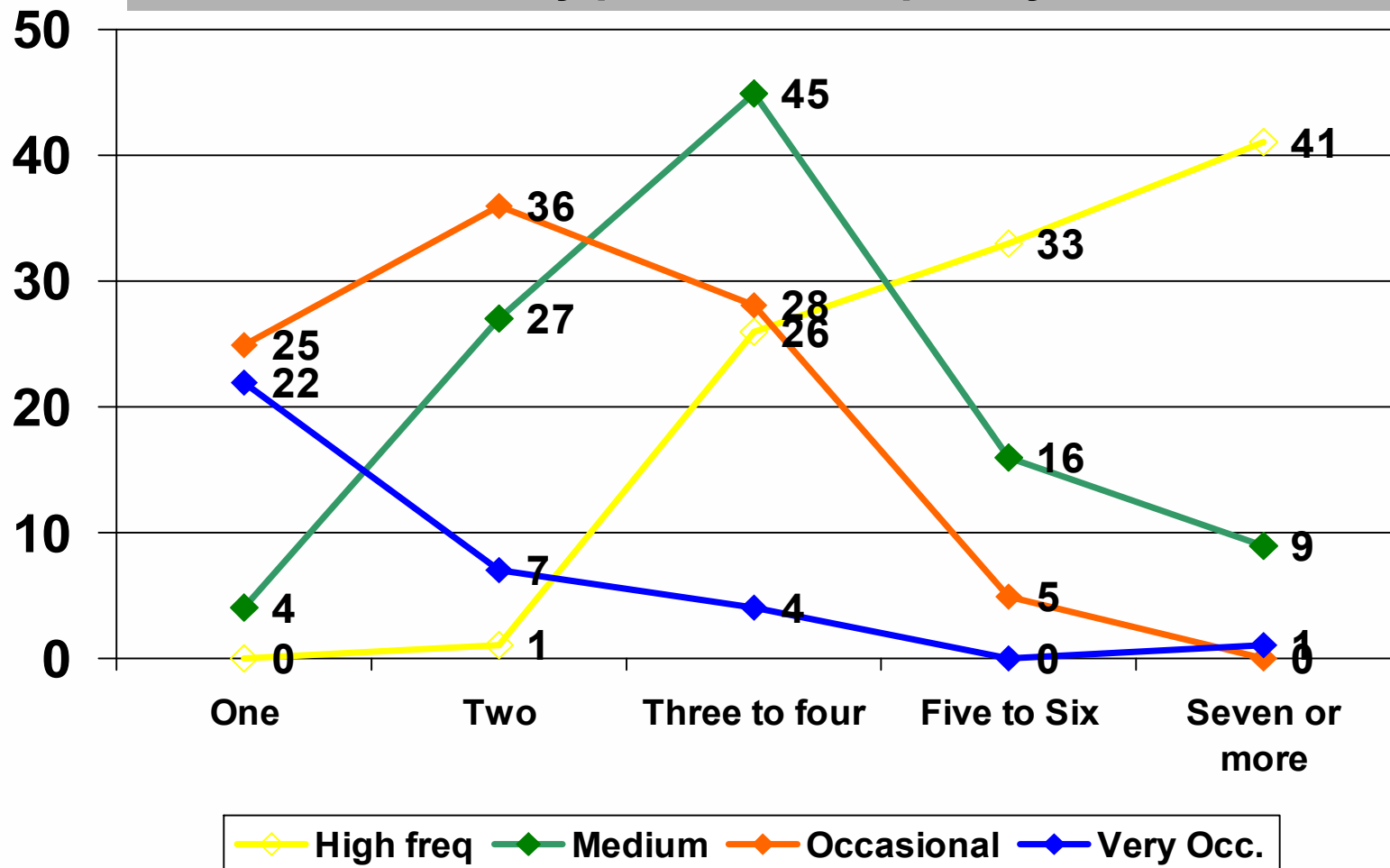
All who ever buy



Fruit purchased in last month by frequency:

All who ever buy

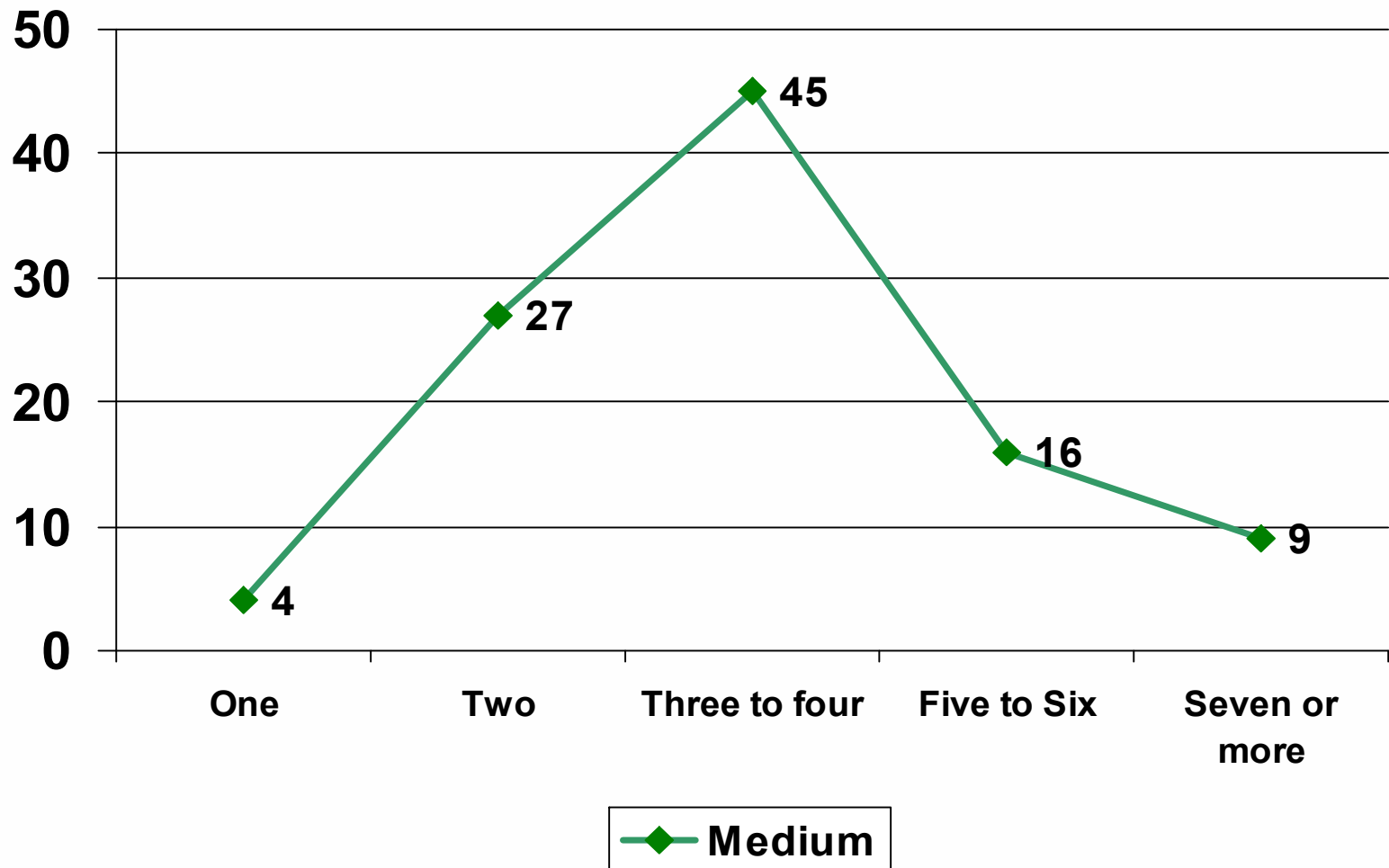
Very different purchase patterns emerge in terms of numbers of fruit by purchase frequency



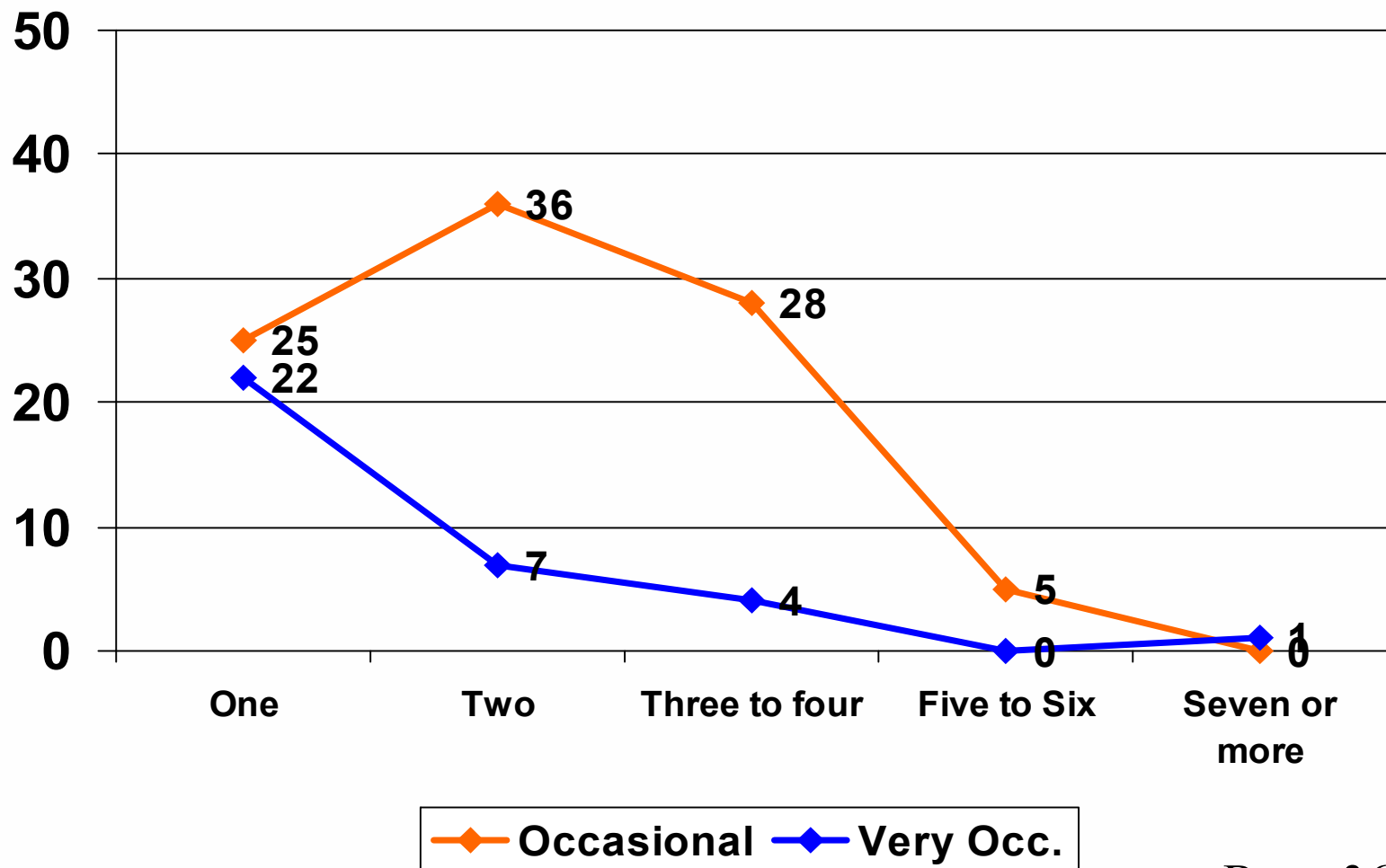
Fruit purchased in last month: High freq buyers



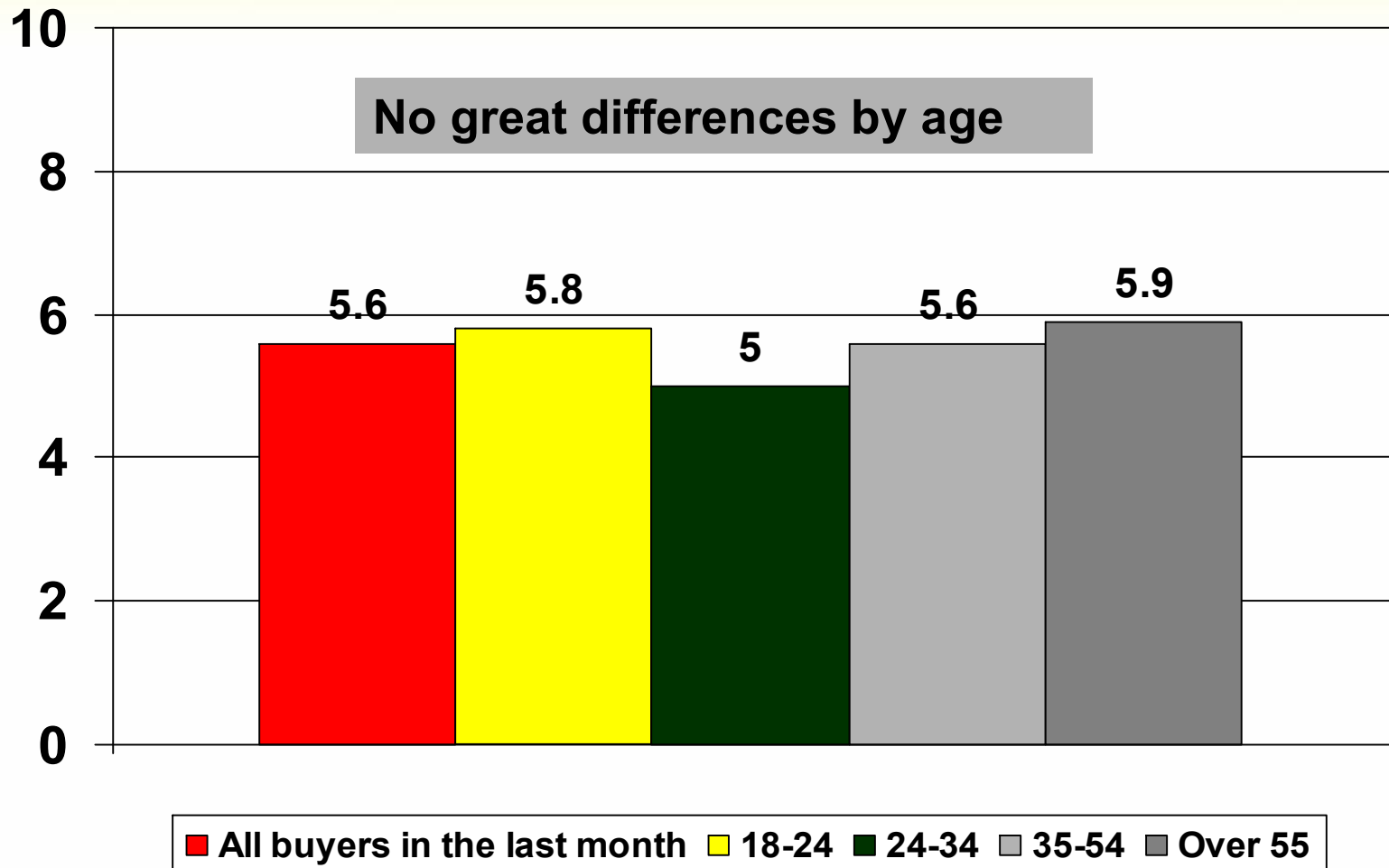
Fruit purchased in last month: Medium freq buyers



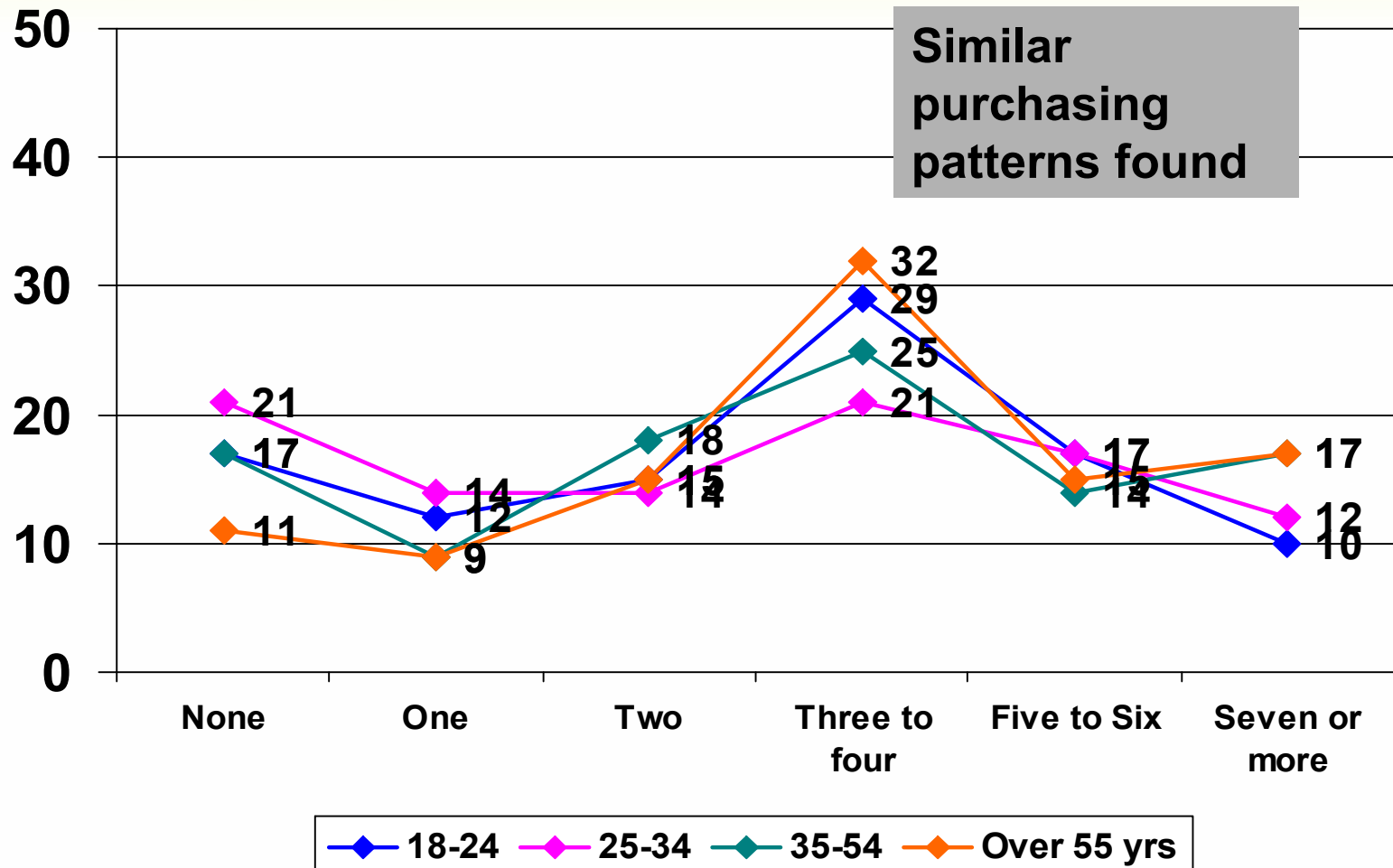
Fruit purchased in last month : All occasional buyers



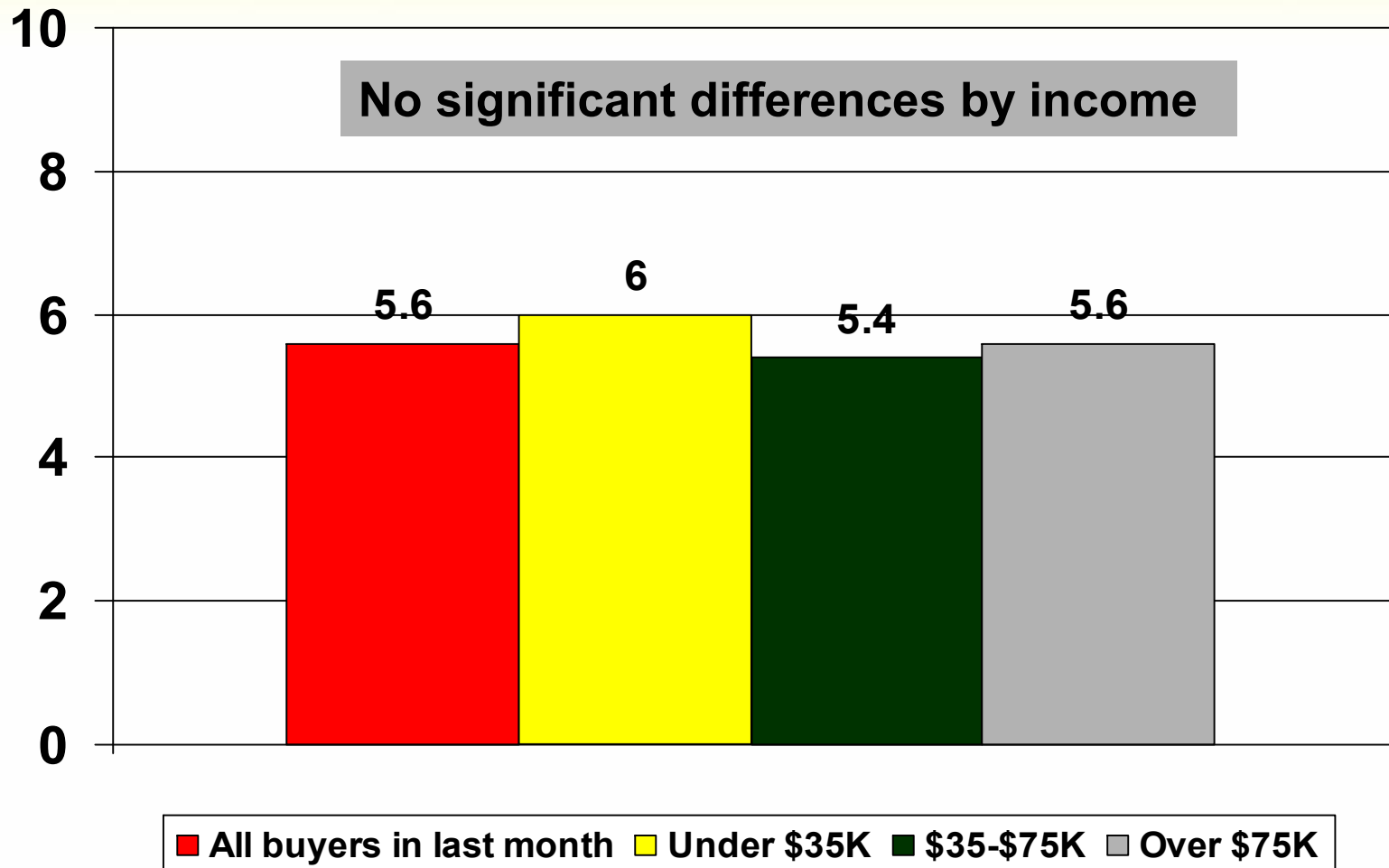
Average number of Fruit Purchased in last month by Age: All buyers in the last month - on recontact



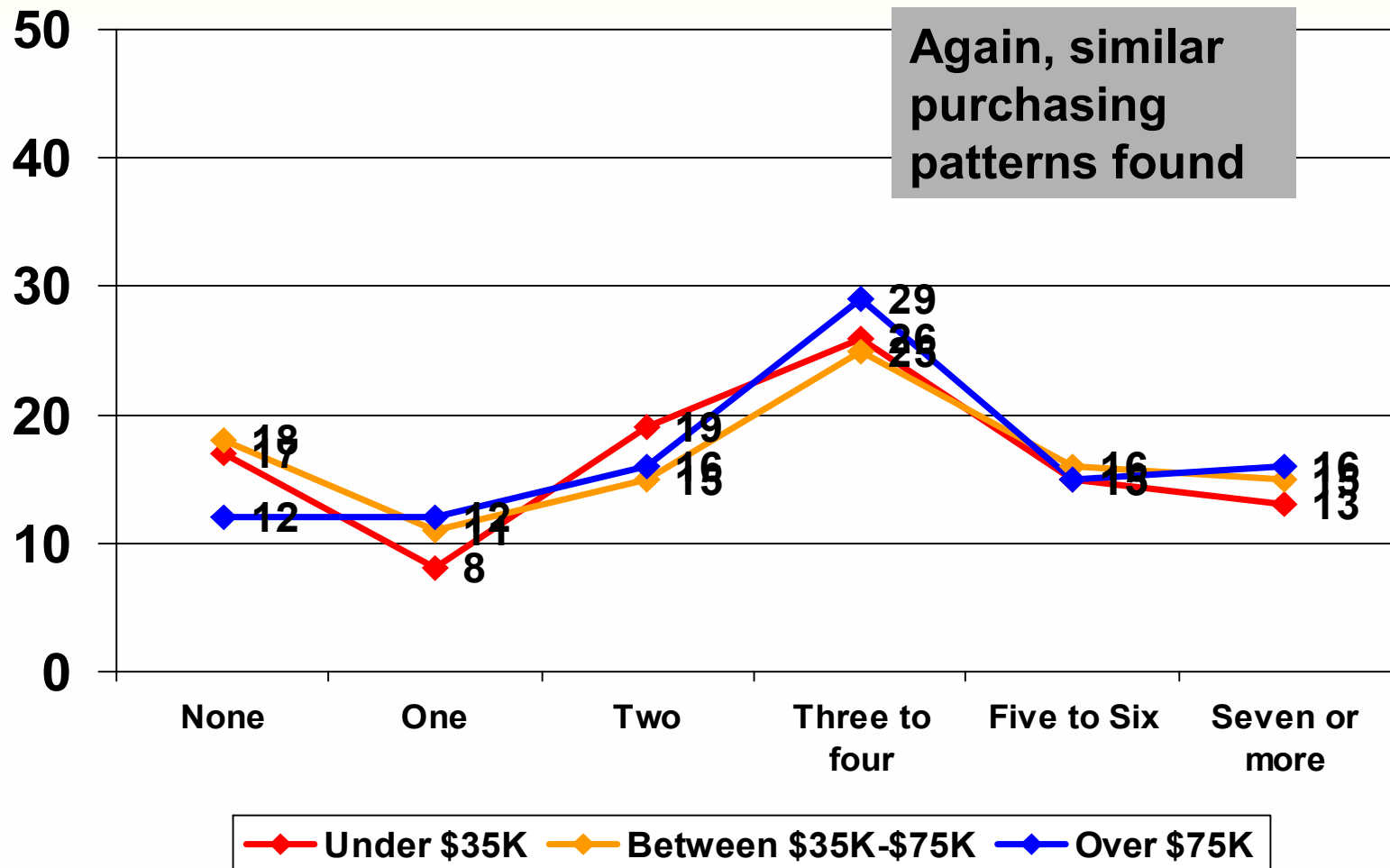
Fruit purchased in last month by Age: All who ever buy



Average number of Fruit Purchased in last month by Income: All buyers in the last month - on recontact



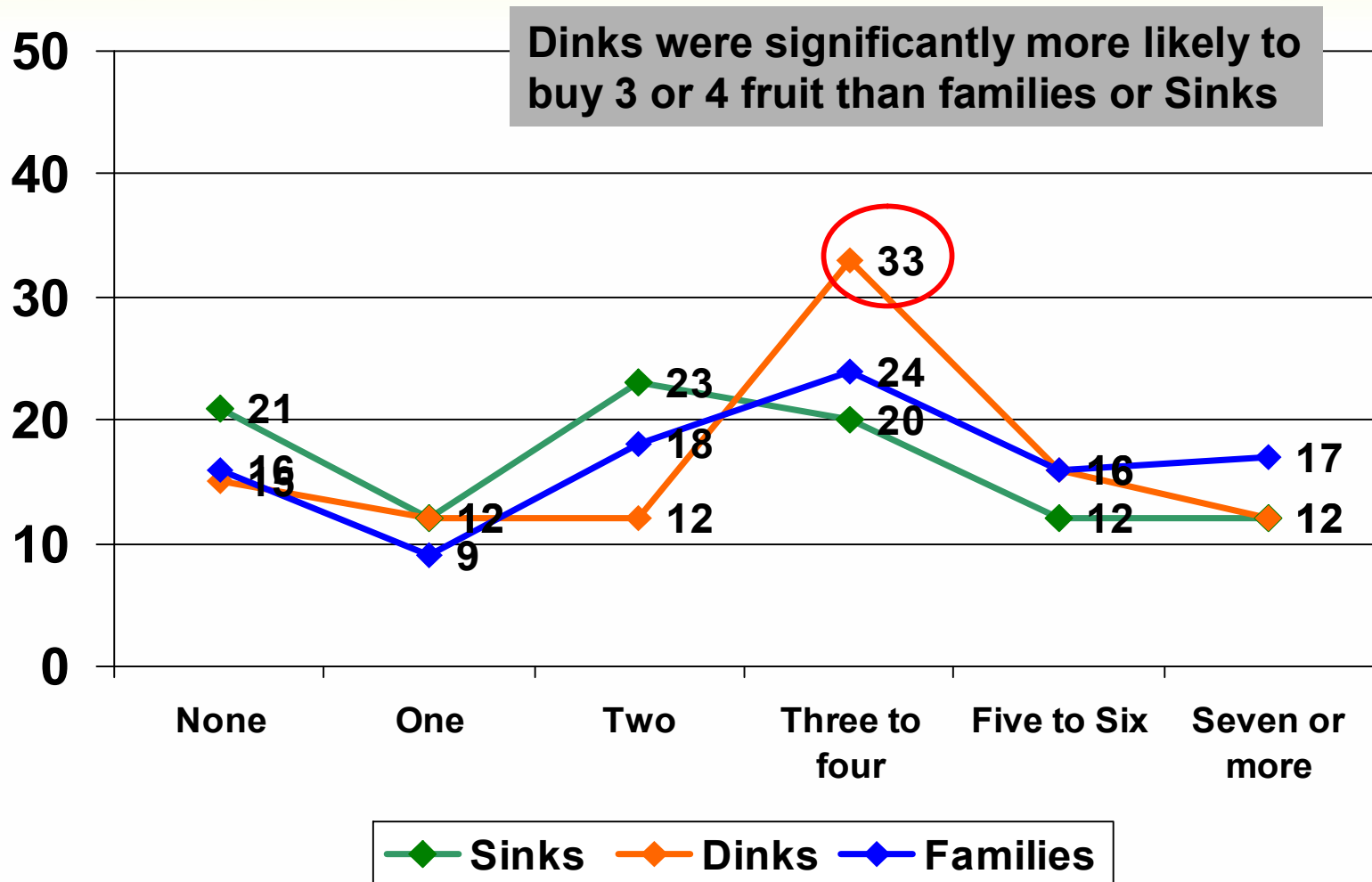
Fruit purchased in last month by Income: All who ever buy



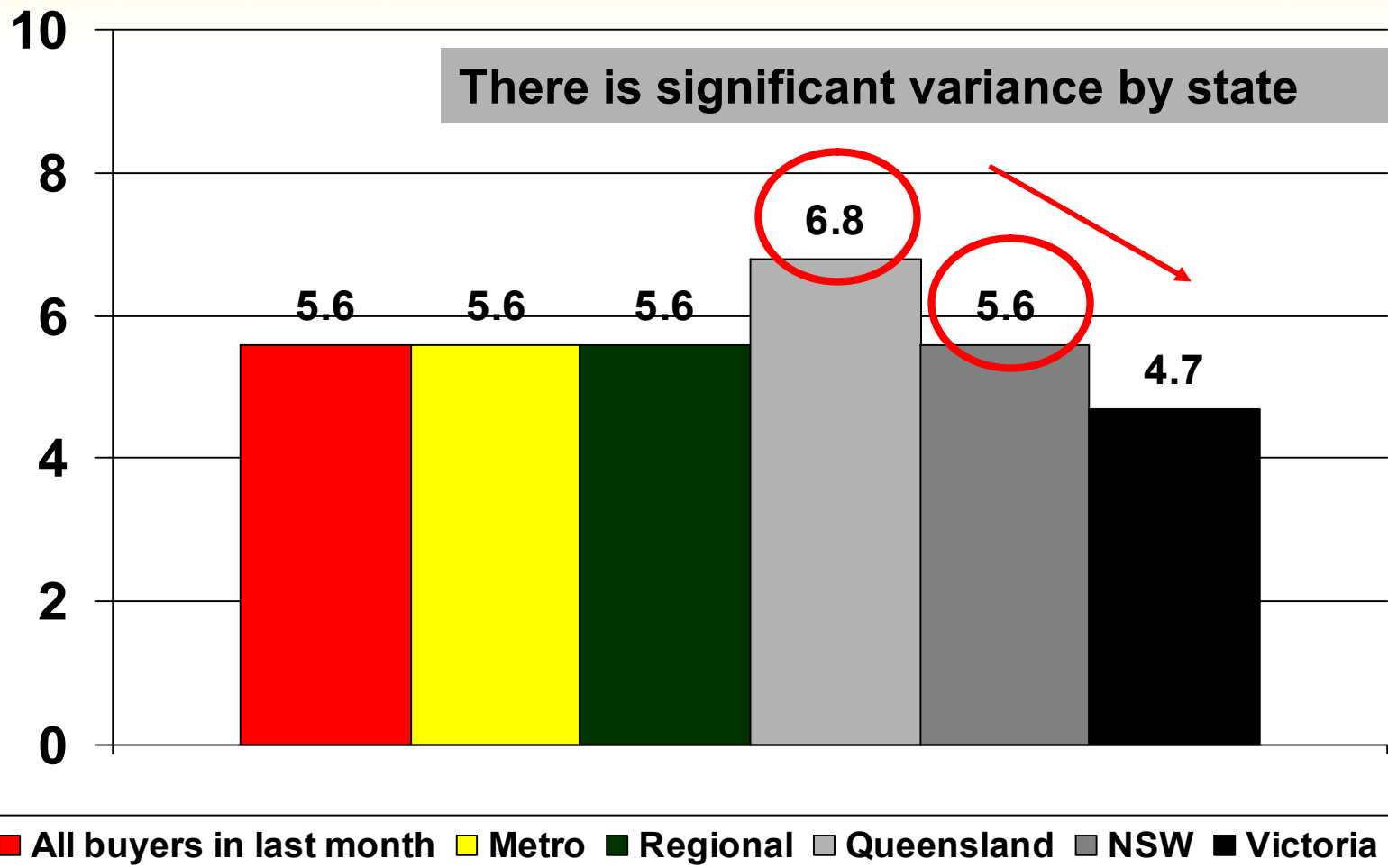
Average number of Fruit Purchased in last month: All buyers in the last month - on recontact



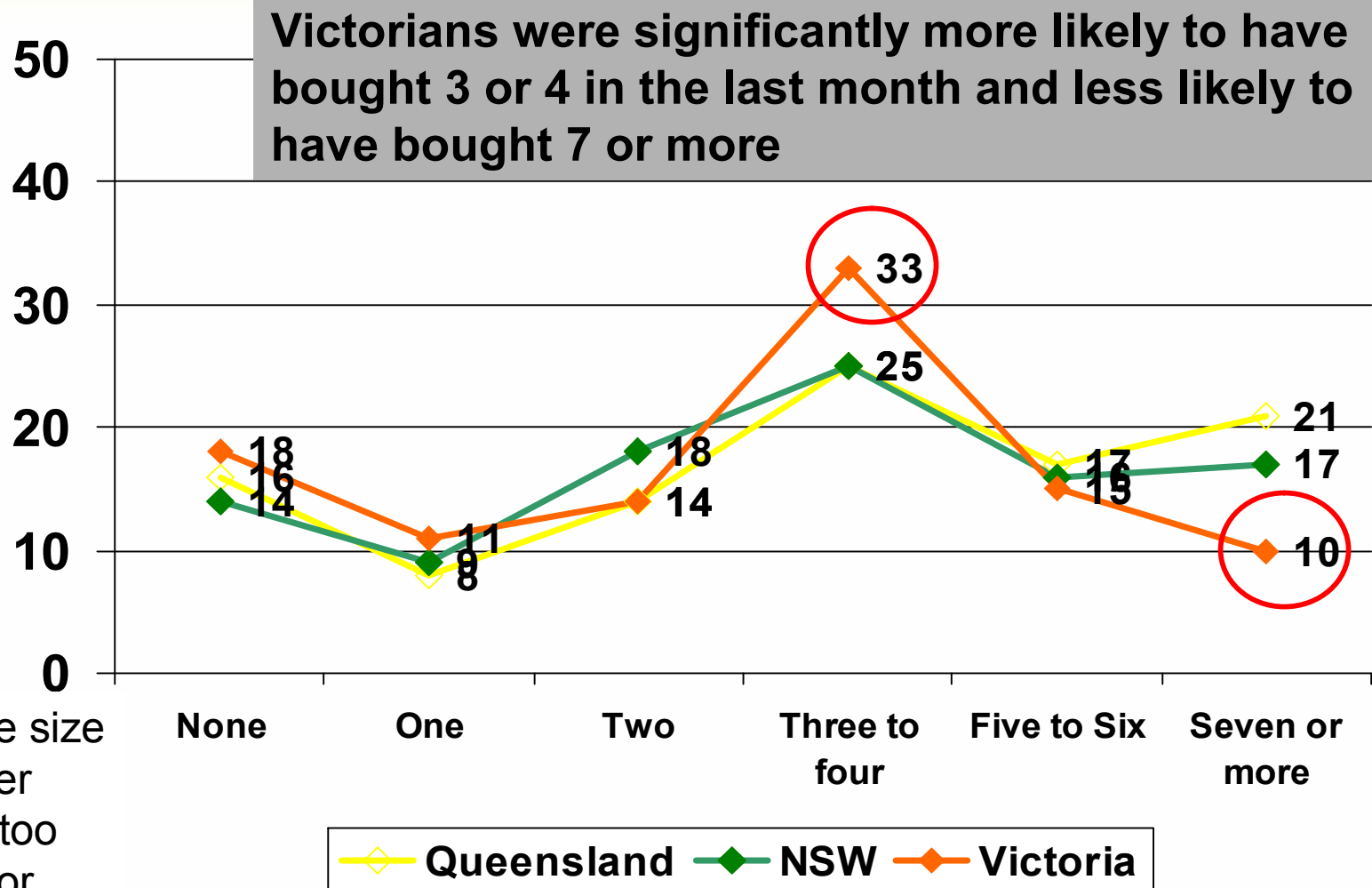
Fruit purchased in last month - Family Status: All who ever buy



Average number of Fruit Purchased in last month by State: All buyers in the last month - on recontact



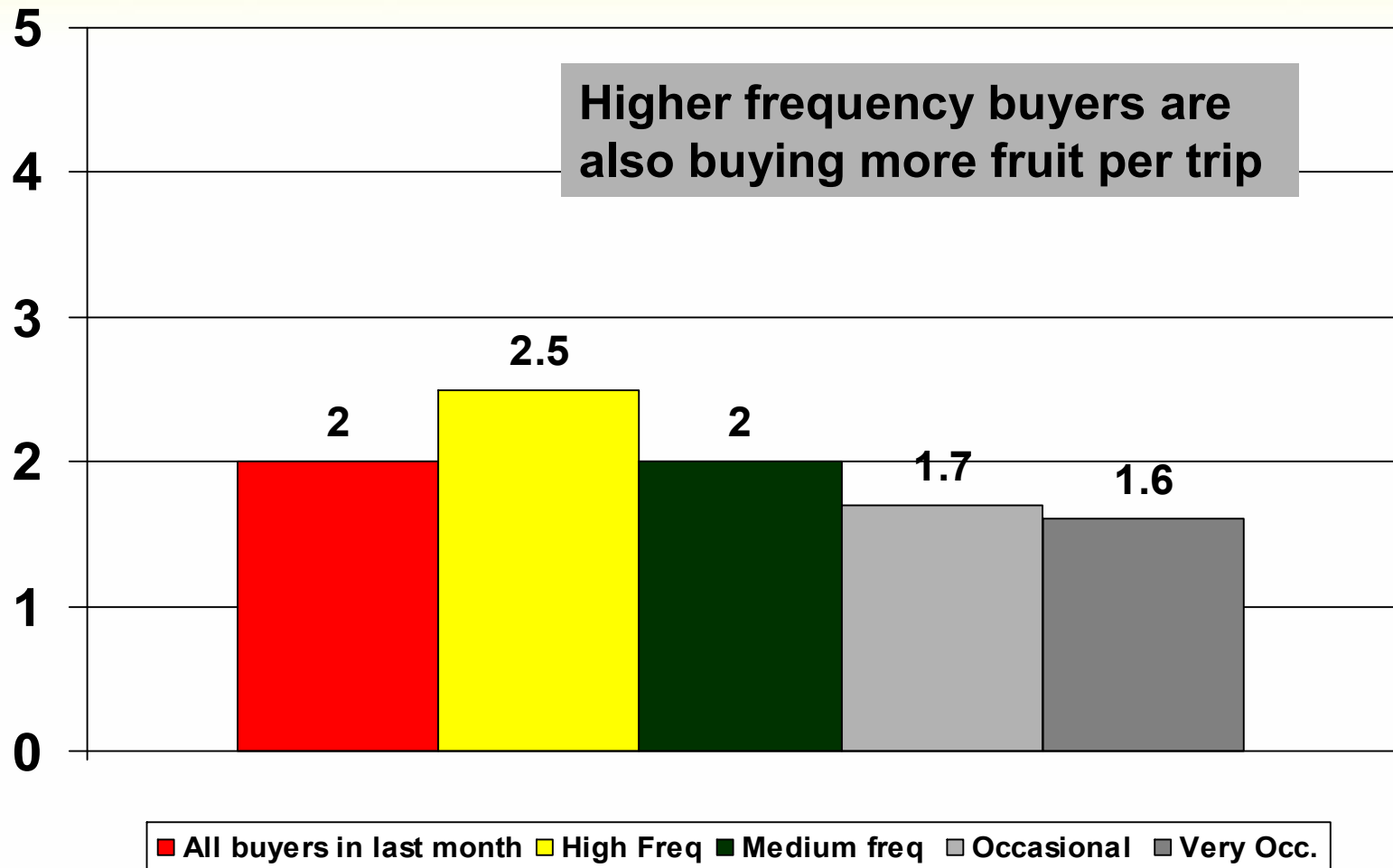
Fruit purchased in last month by State: All buyers



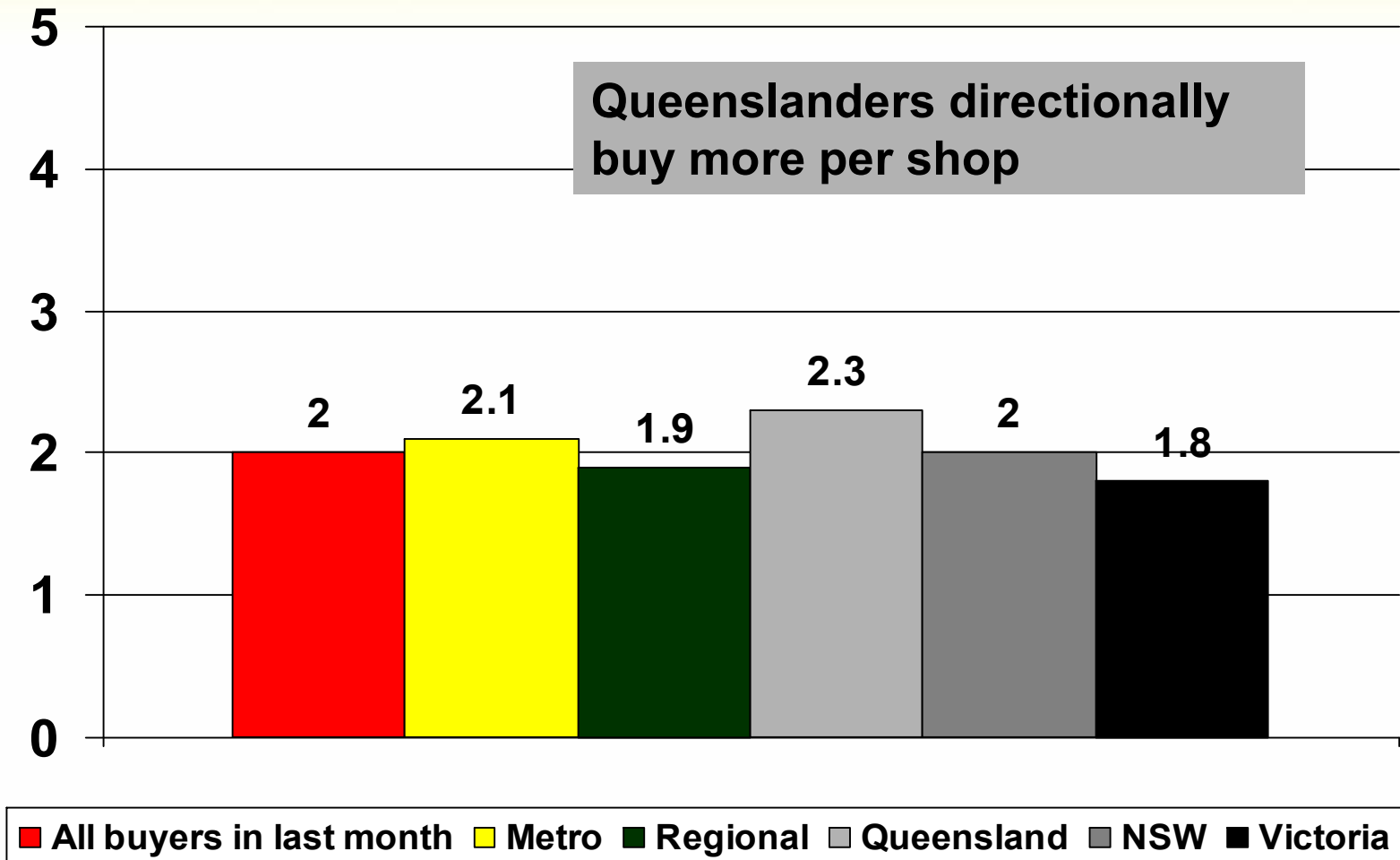
Base: 741



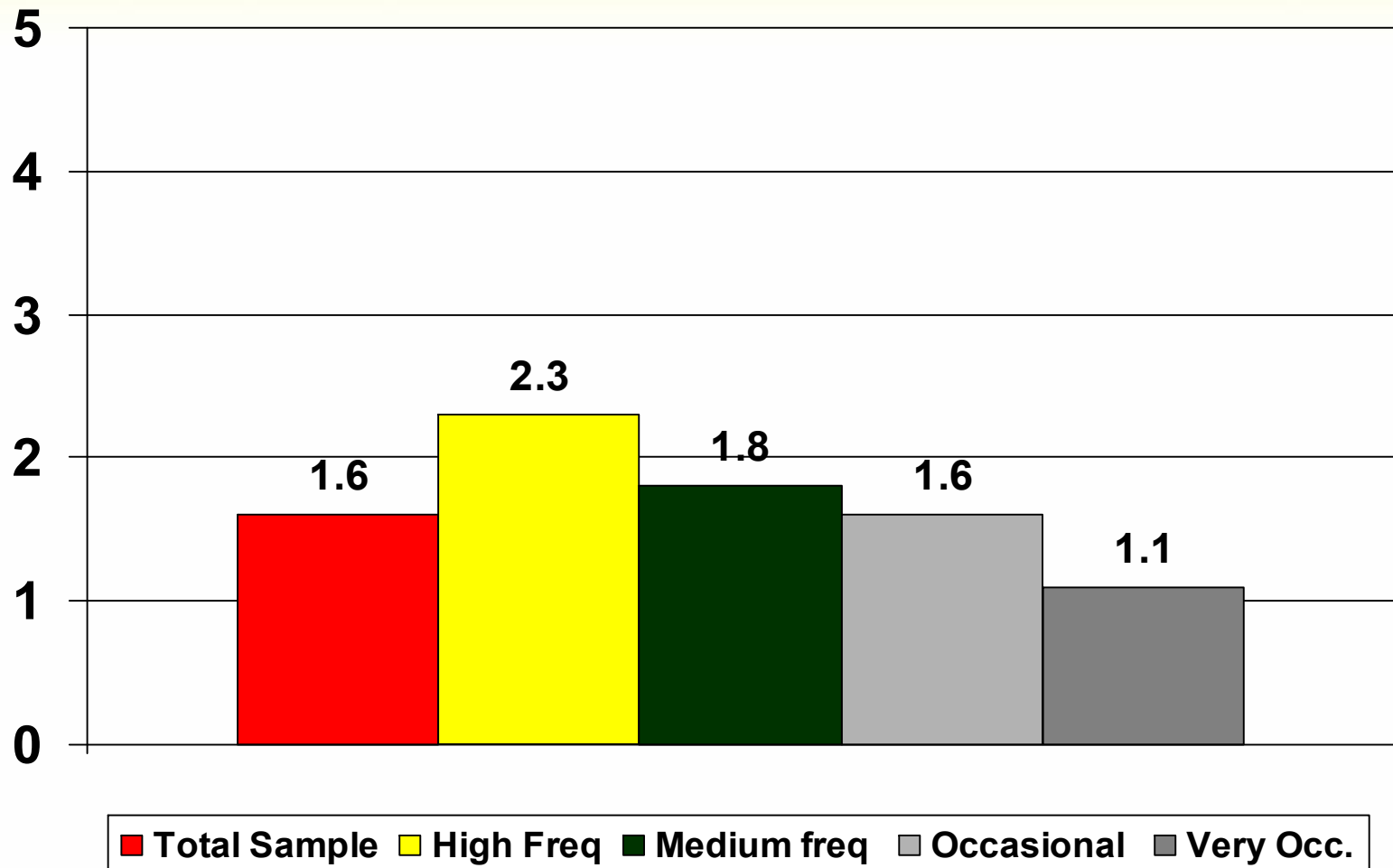
Average number of Fruit Purchased per shopping trip: All buyers in the last month - on recontact



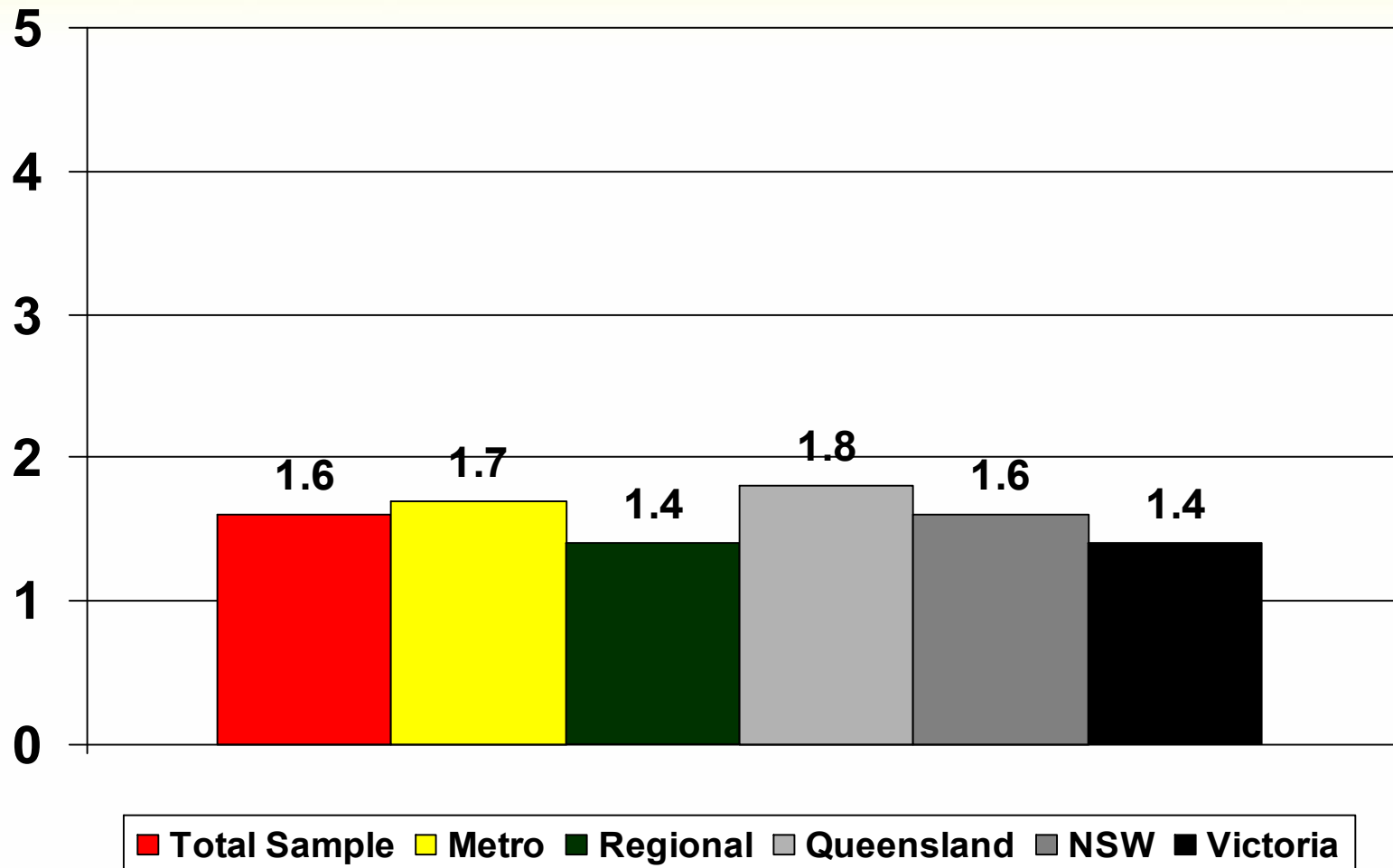
Average number of Fruit Purchased per shopping trip: All buyers in the last month - on recontact



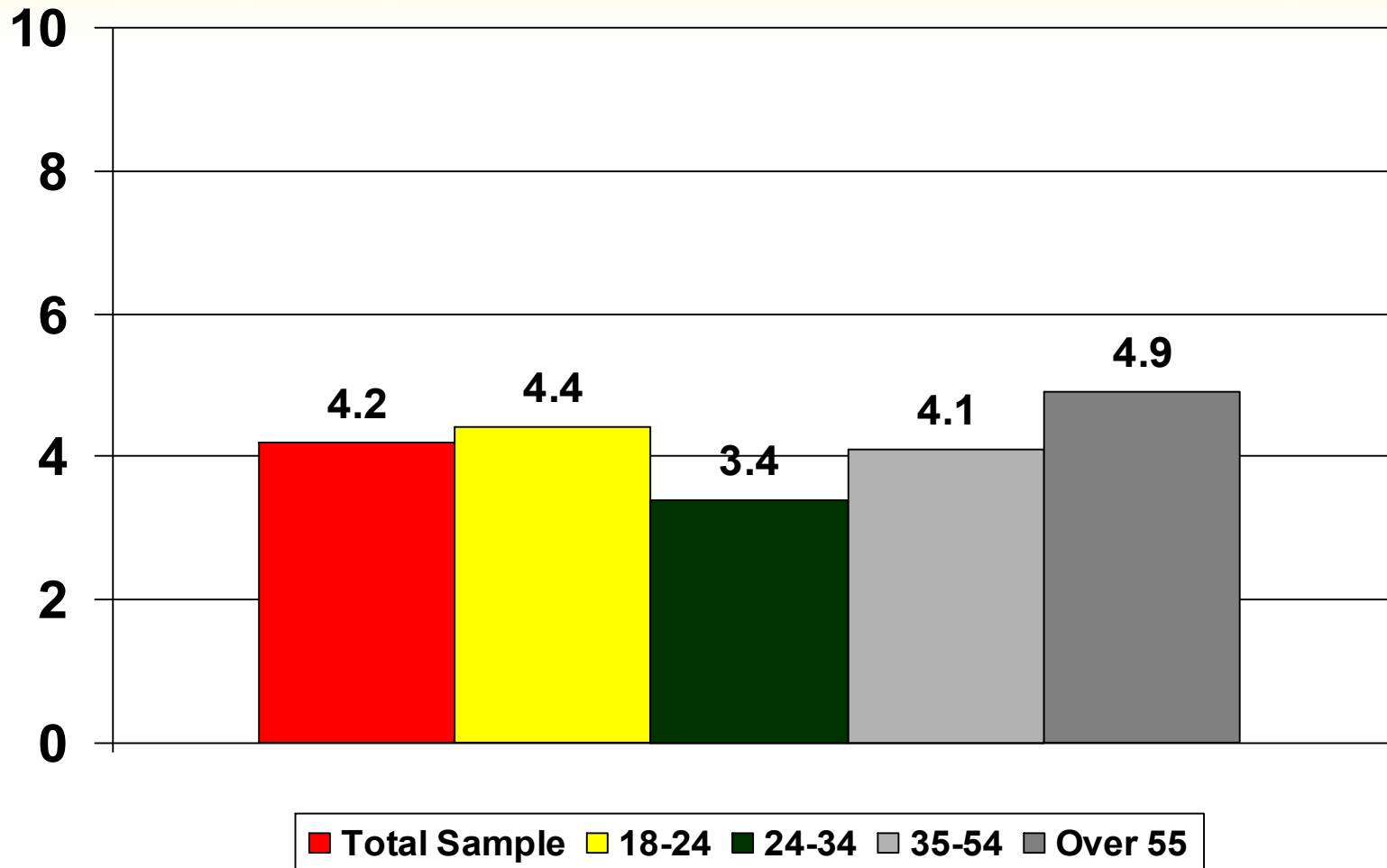
Average number of Fruit Purchased per shopping trip: All respondents - on recontact



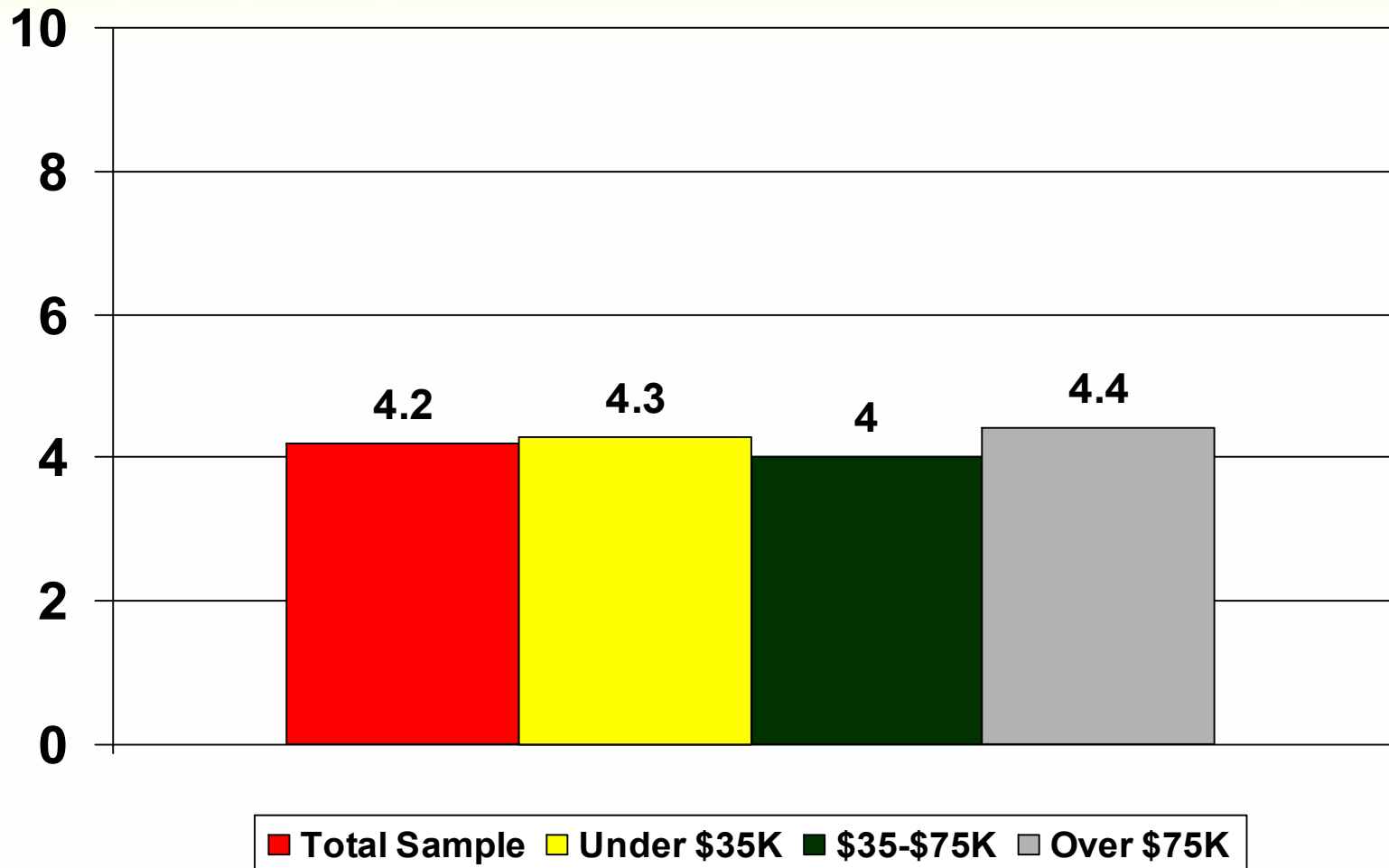
Average number of Fruit Purchased per shopping trip: All respondents - on recontact



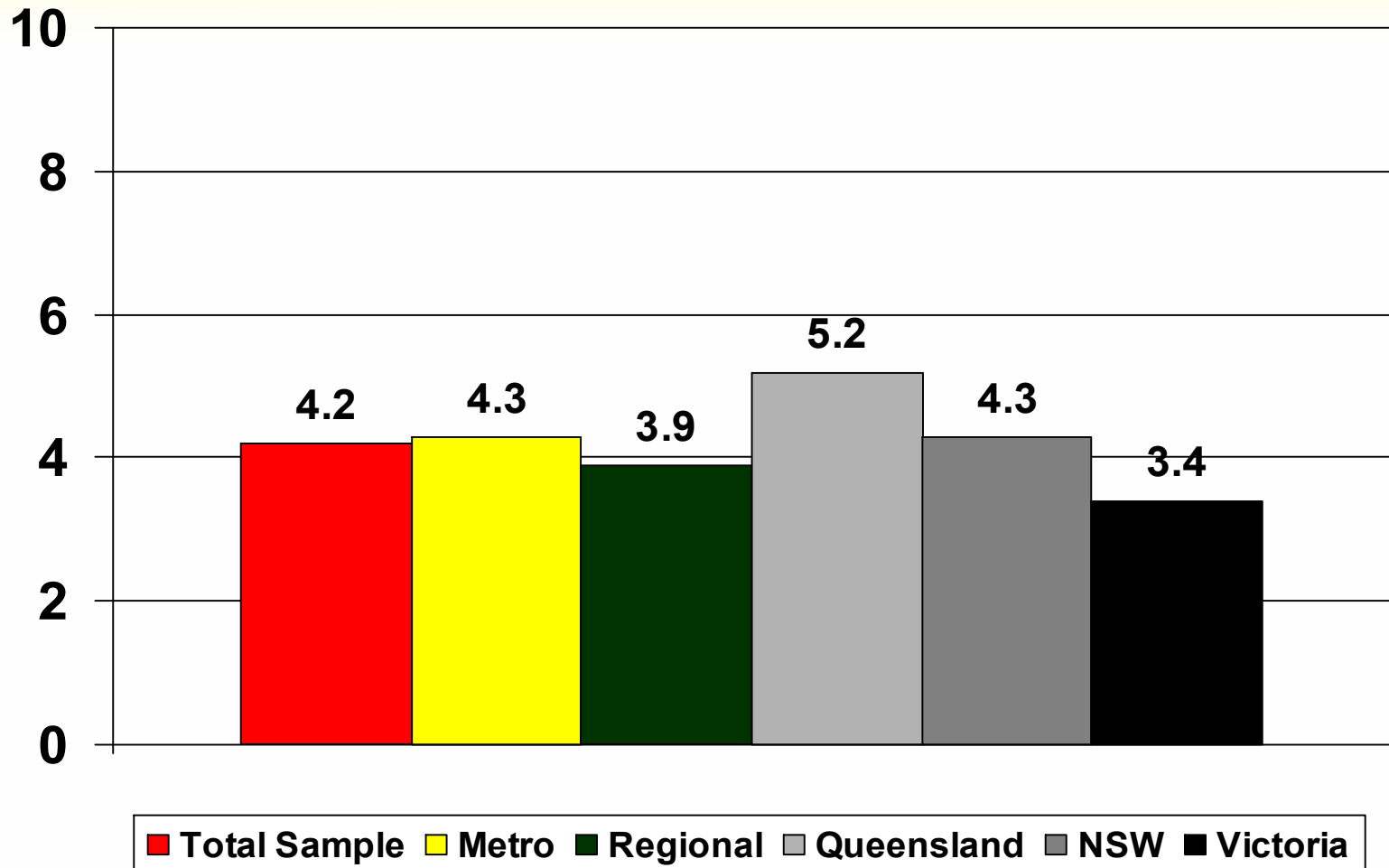
Average number of Fruit Purchased in last month by Age: All respondents - on recontact



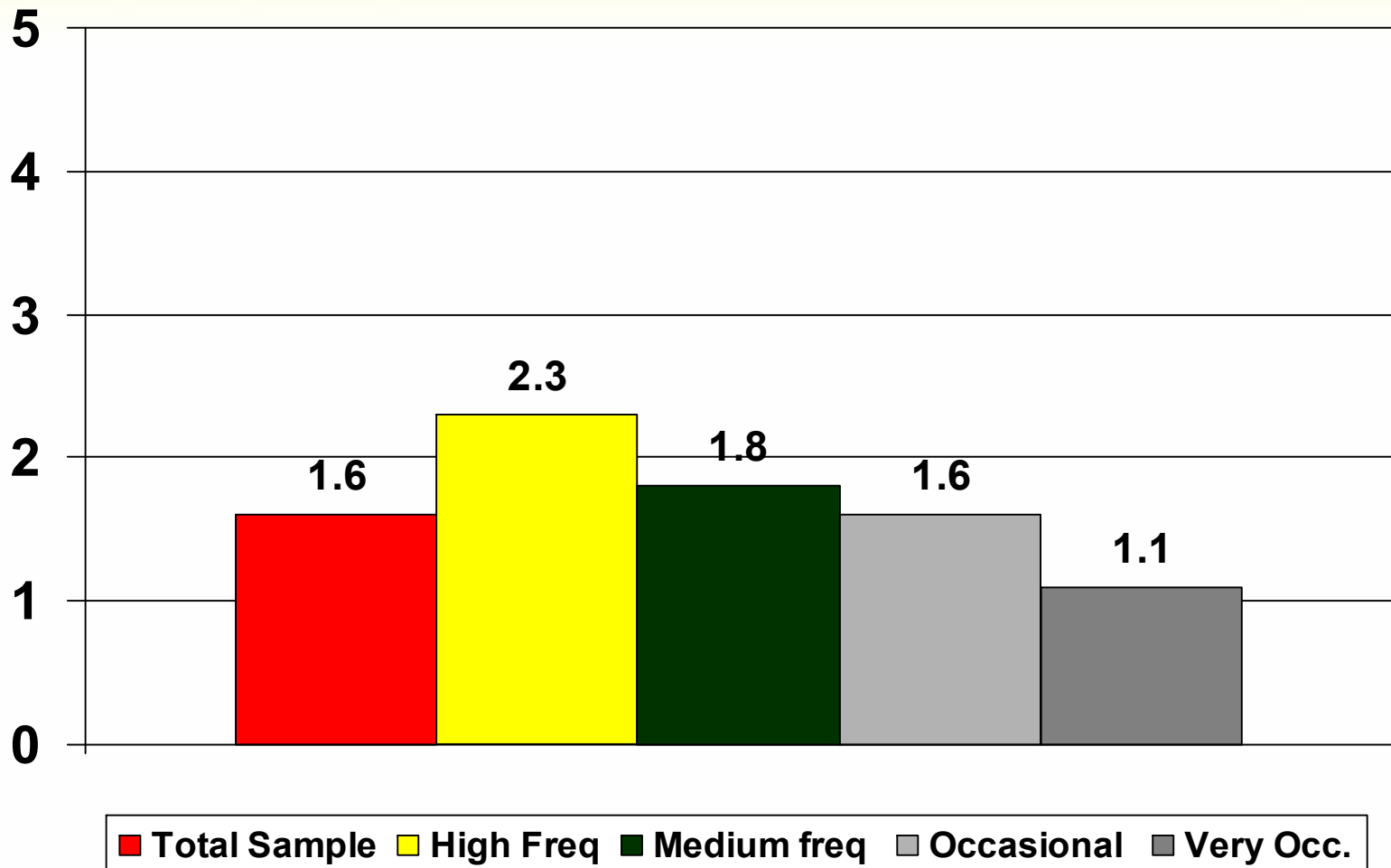
Average number of Fruit Purchased in last month by Income: All respondents - on recontact



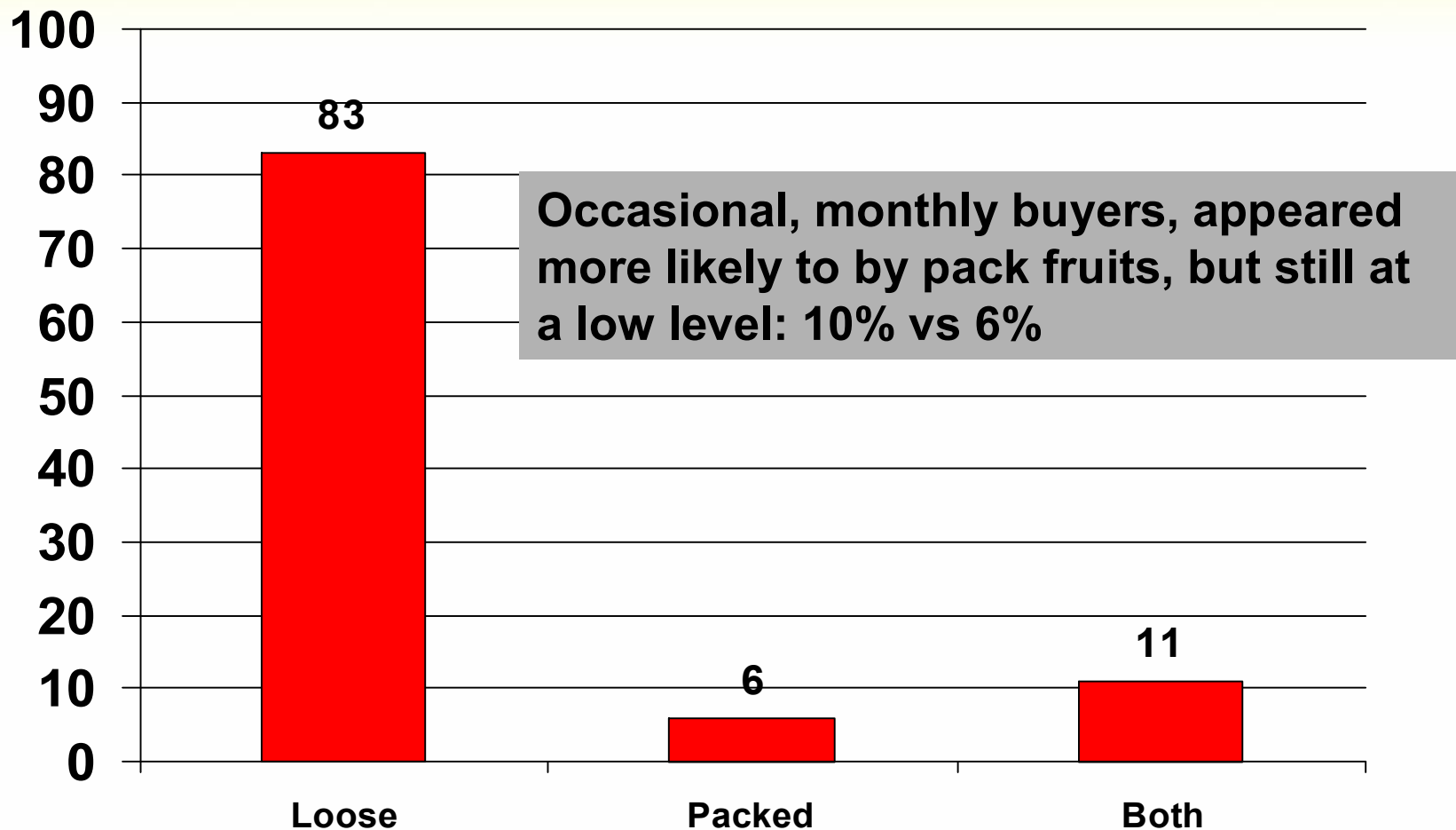
Average number of Fruit Purchased in last month by State: All respondents - on recontact



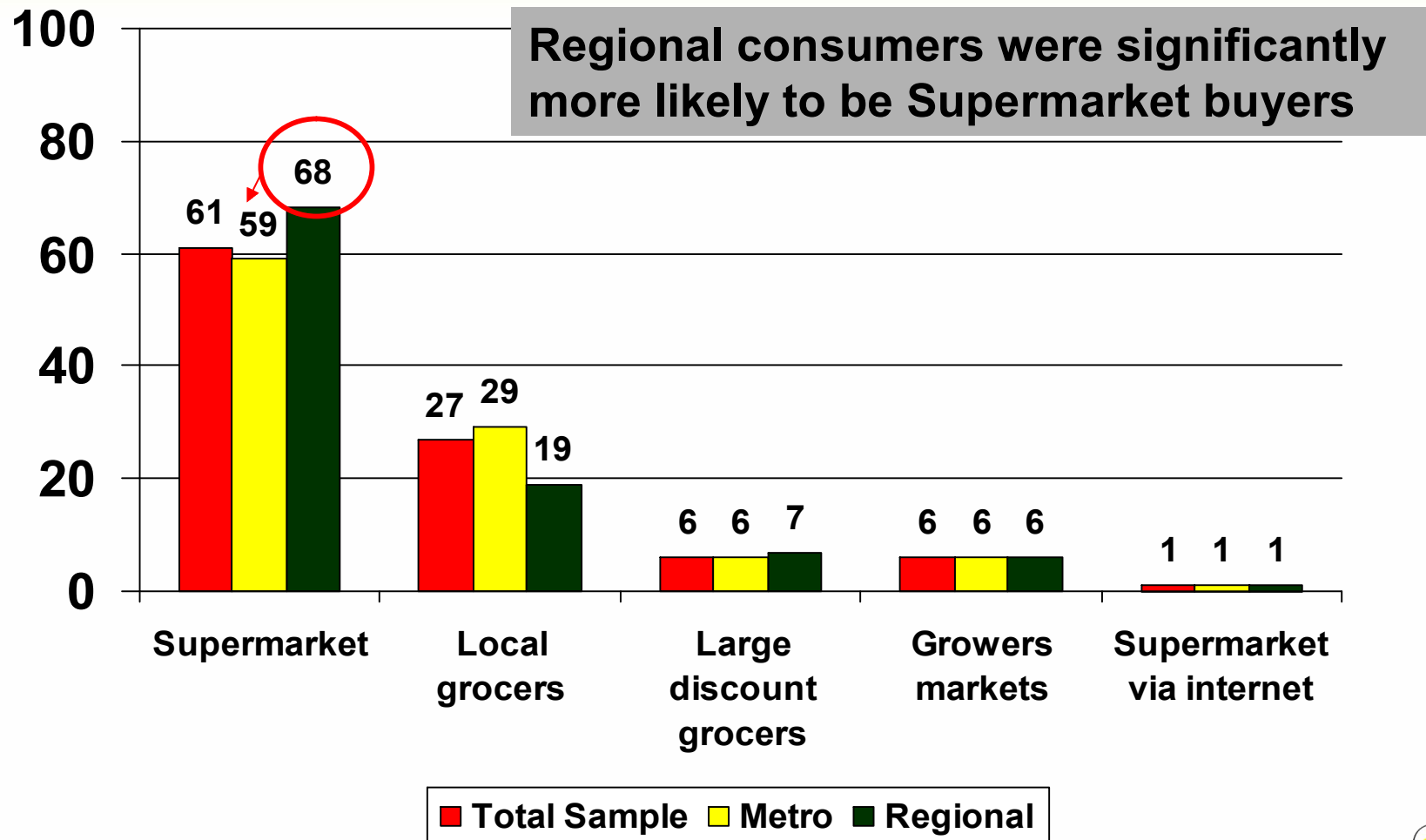
Average number of Fruit Purchased per shopping trip: All current buyers - on recontact



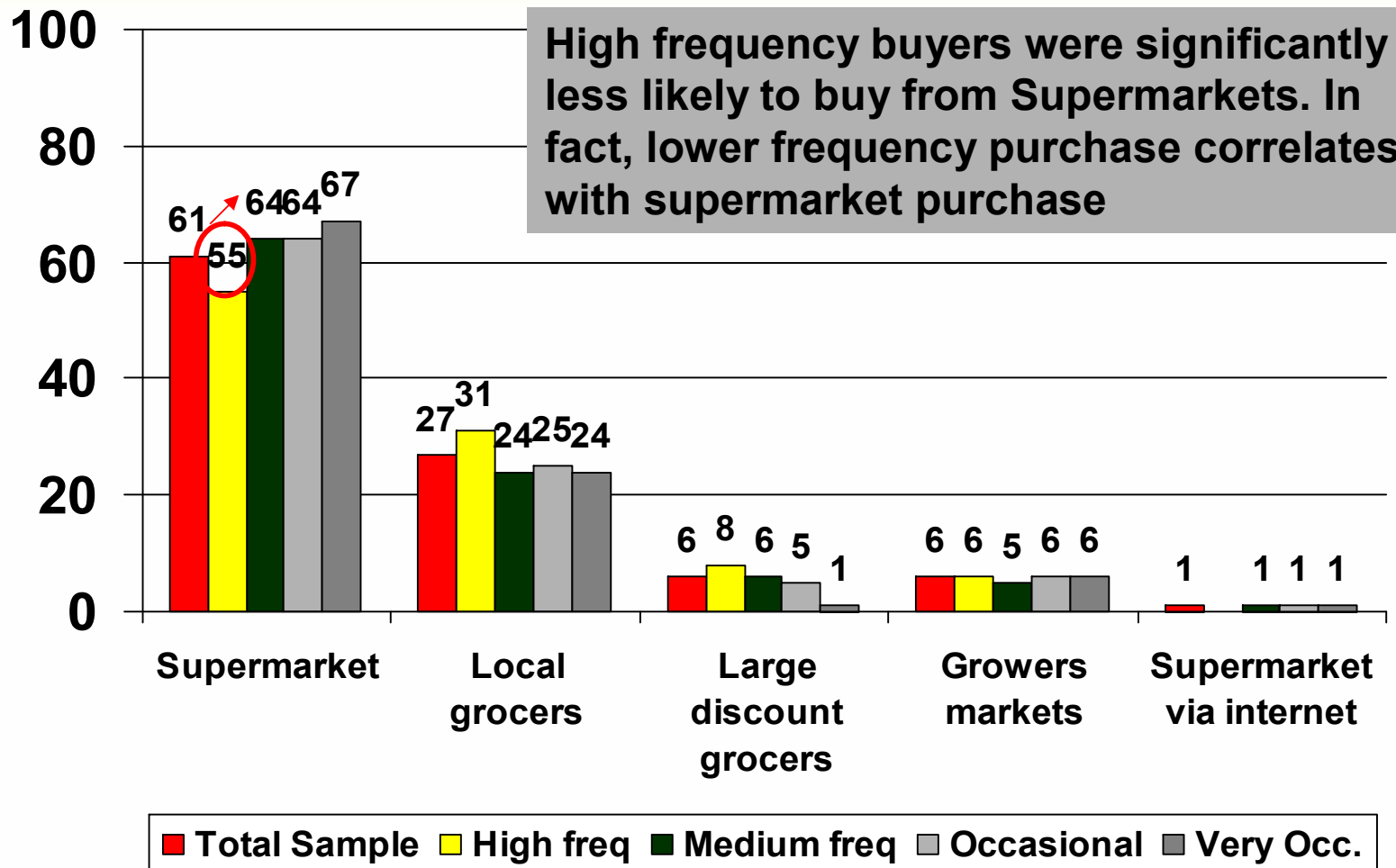
Where Avocados purchased loose, or packed in the last month: All buyers in the last month



Location of purchase in the last month: All buyers in the last month



Location of purchase in the last month: All buyers in the last month



Base: 753



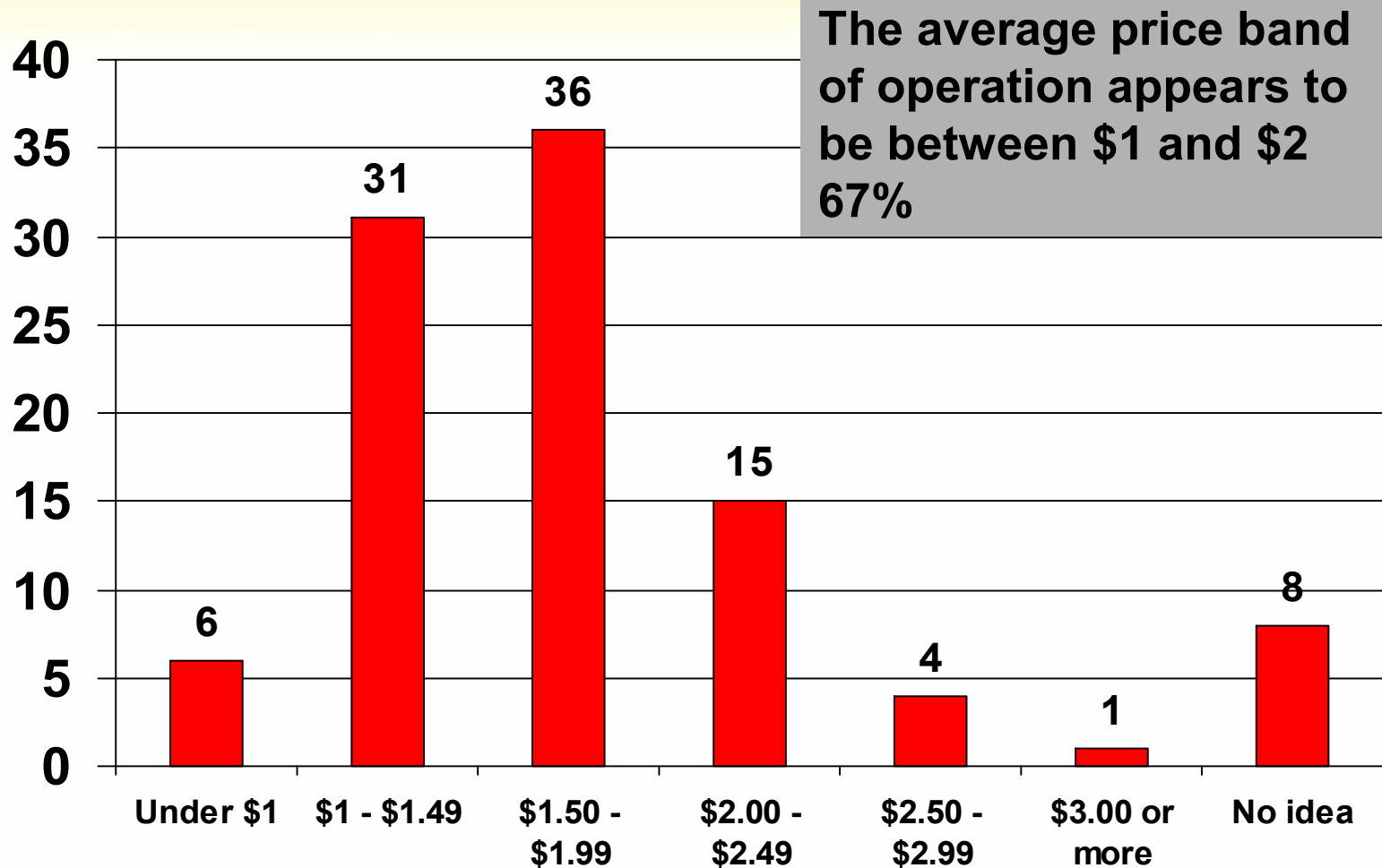
Fruit Purchasing Summary

- Of the total sample, 75% had bought avocado fruit in the last month.
- Average fruit purchase was 5.6 in the last month
- Average fruit purchase appeared to differ little amongst buyers of different demographic groups, apart from by State, where significant variance was found (6.8 QLD, 5.6 NSW, 4.7 VIC)
- Buyers in the last month claimed on average to have bought 2 fruit per shopping trip, although this was higher amongst the highest frequency purchasers (2.5)
- The vast majority of fruit purchased were bought loose (83%)
- Most avocado were purchased in supermarkets (61%), a figure that increased to 68% in Regional areas. Interestingly, high frequency buyers were less likely to buy at a supermarket (55%)

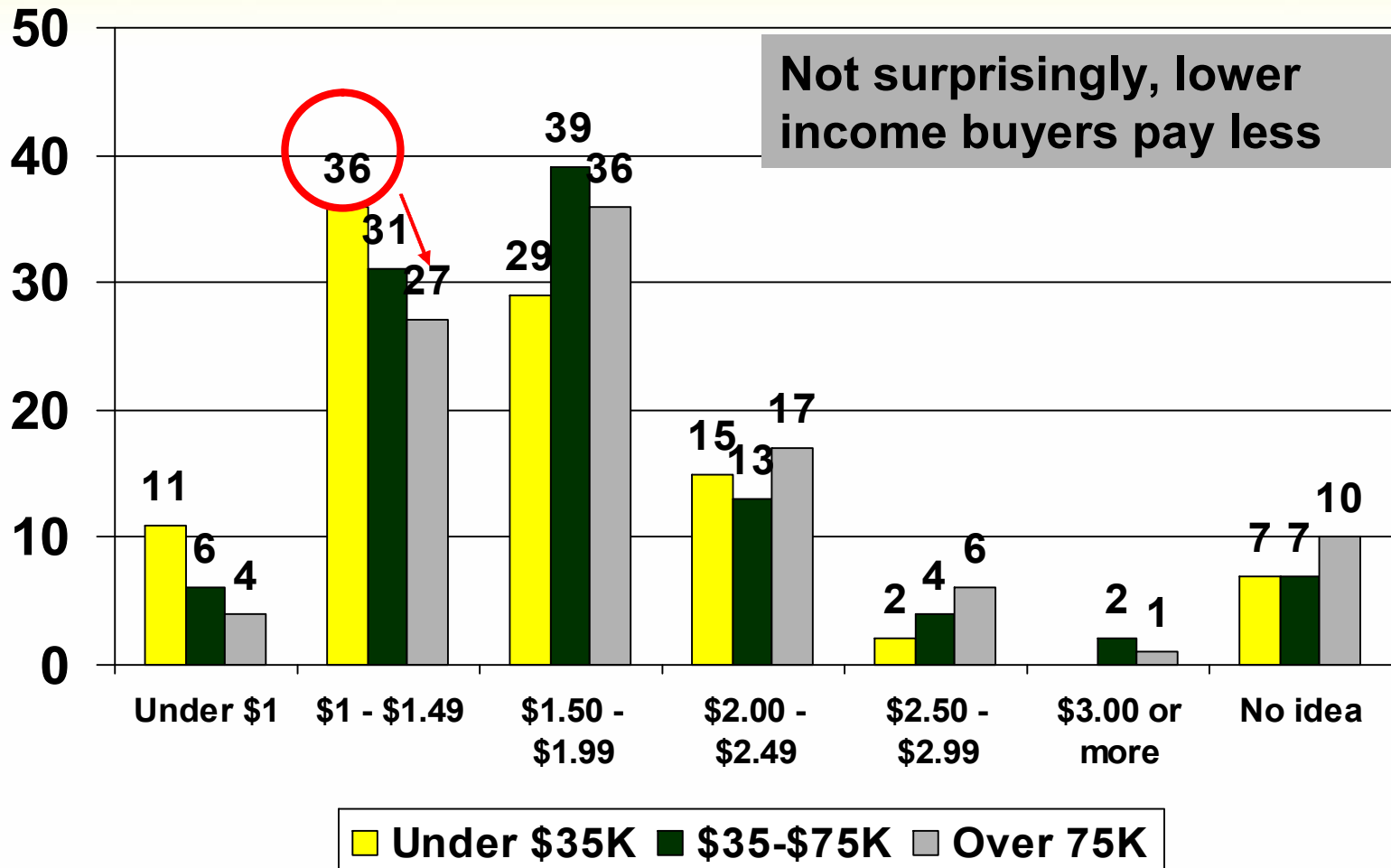
Fruit Pricing

Fruit Cost at last purchase in last month:

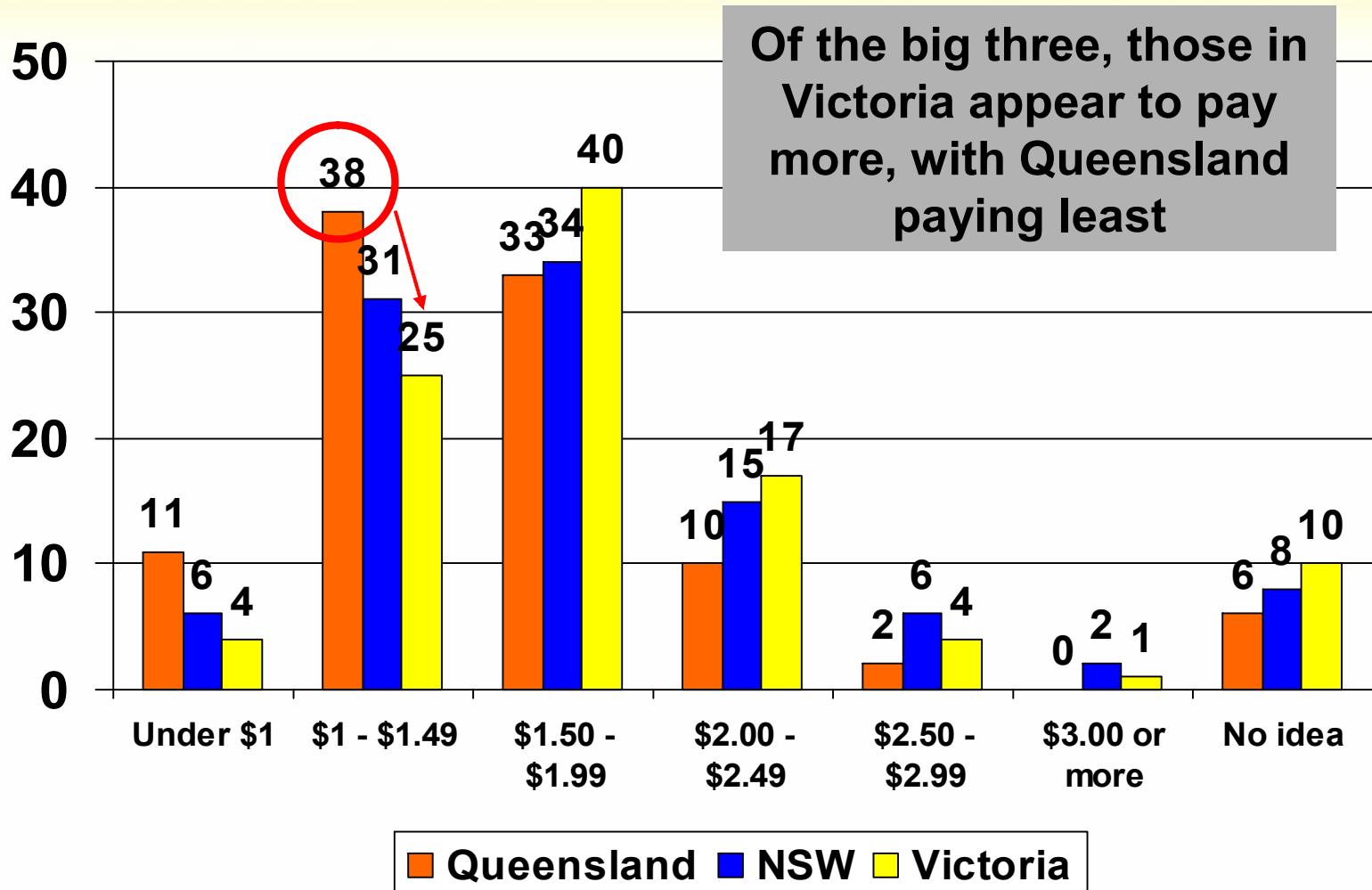
All who ever buy



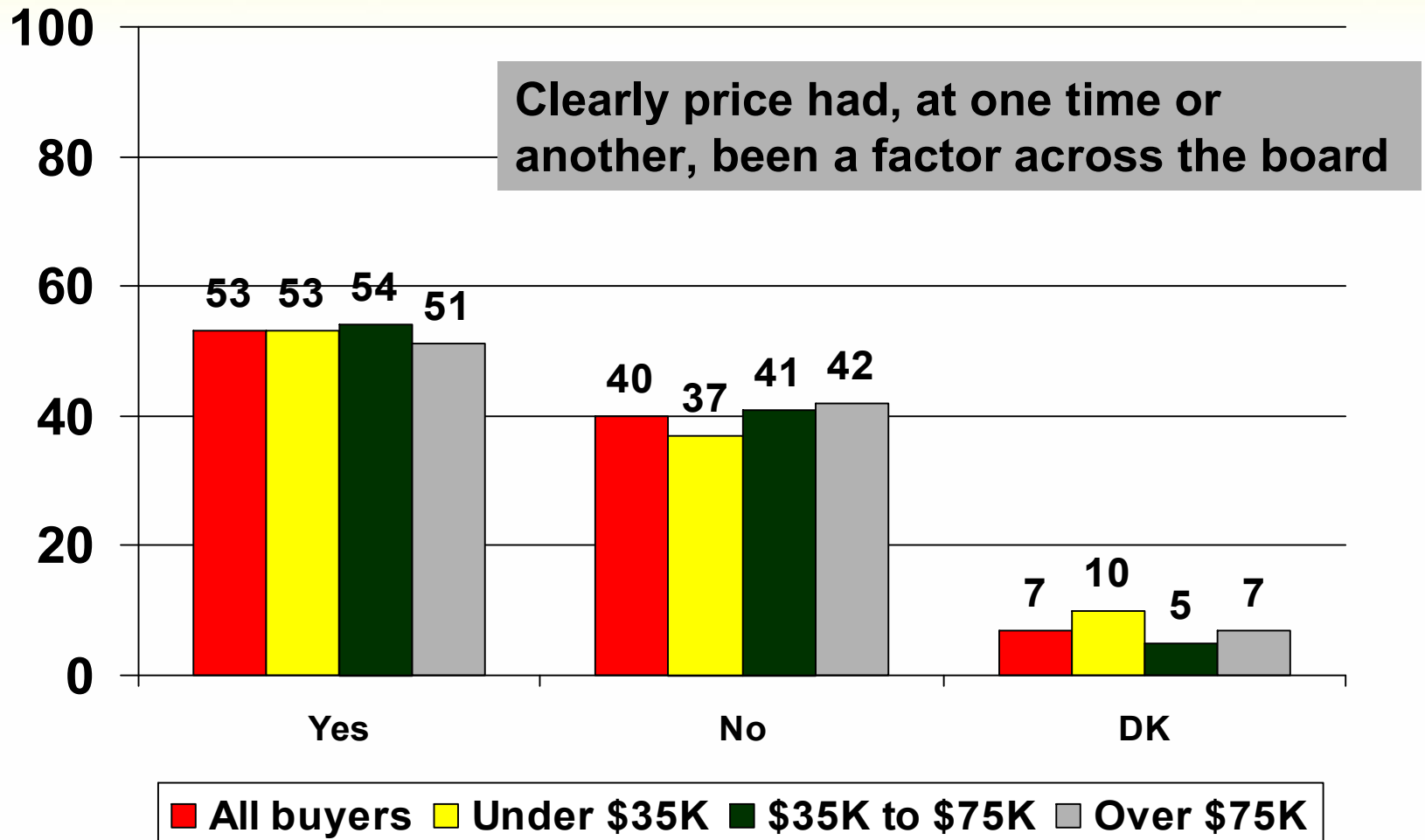
Fruit Cost at last purchase in last month by income: All who ever buy



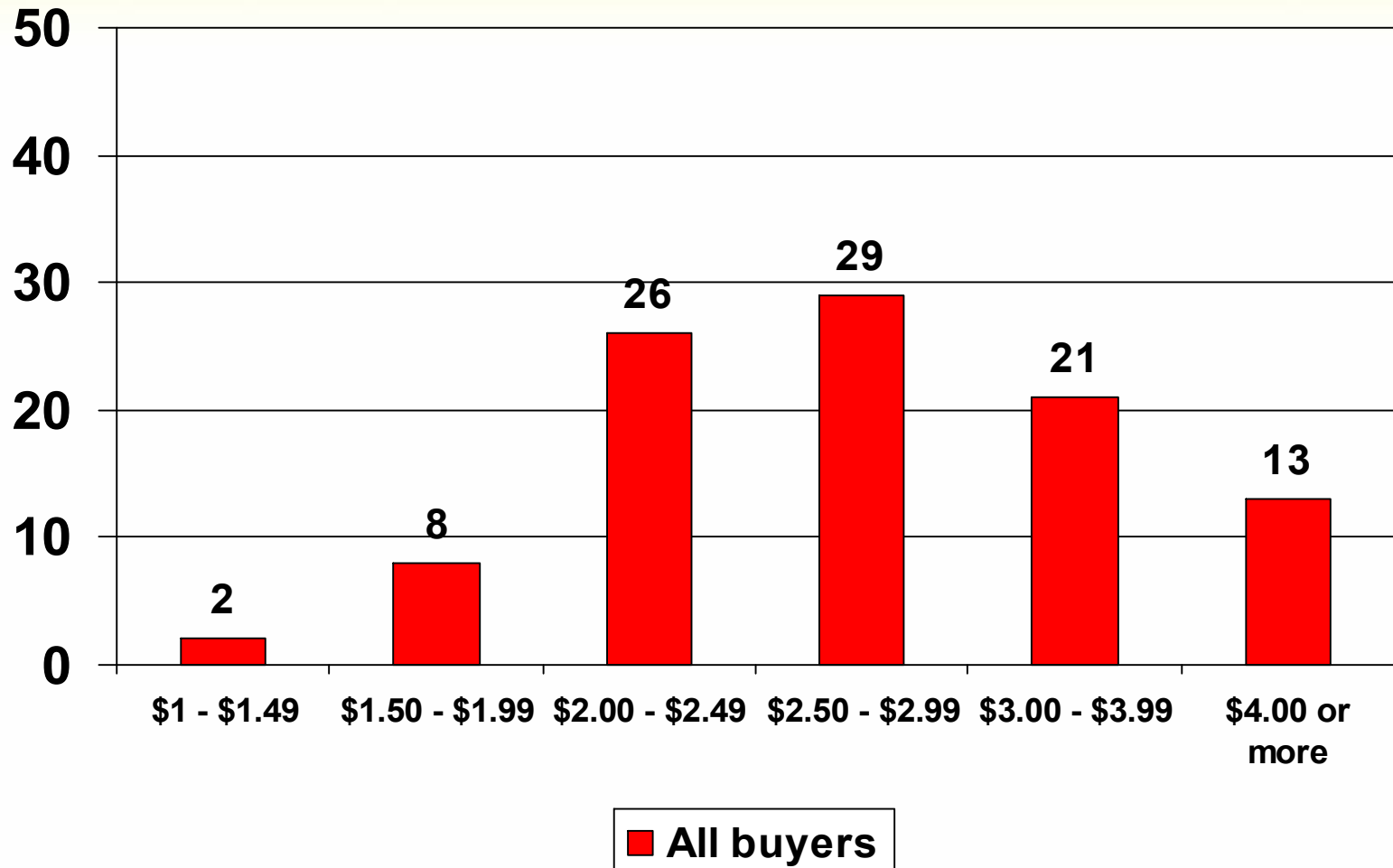
Fruit Cost at last purchase in last month by State: All who ever buy (QLD, NSW, VIC)



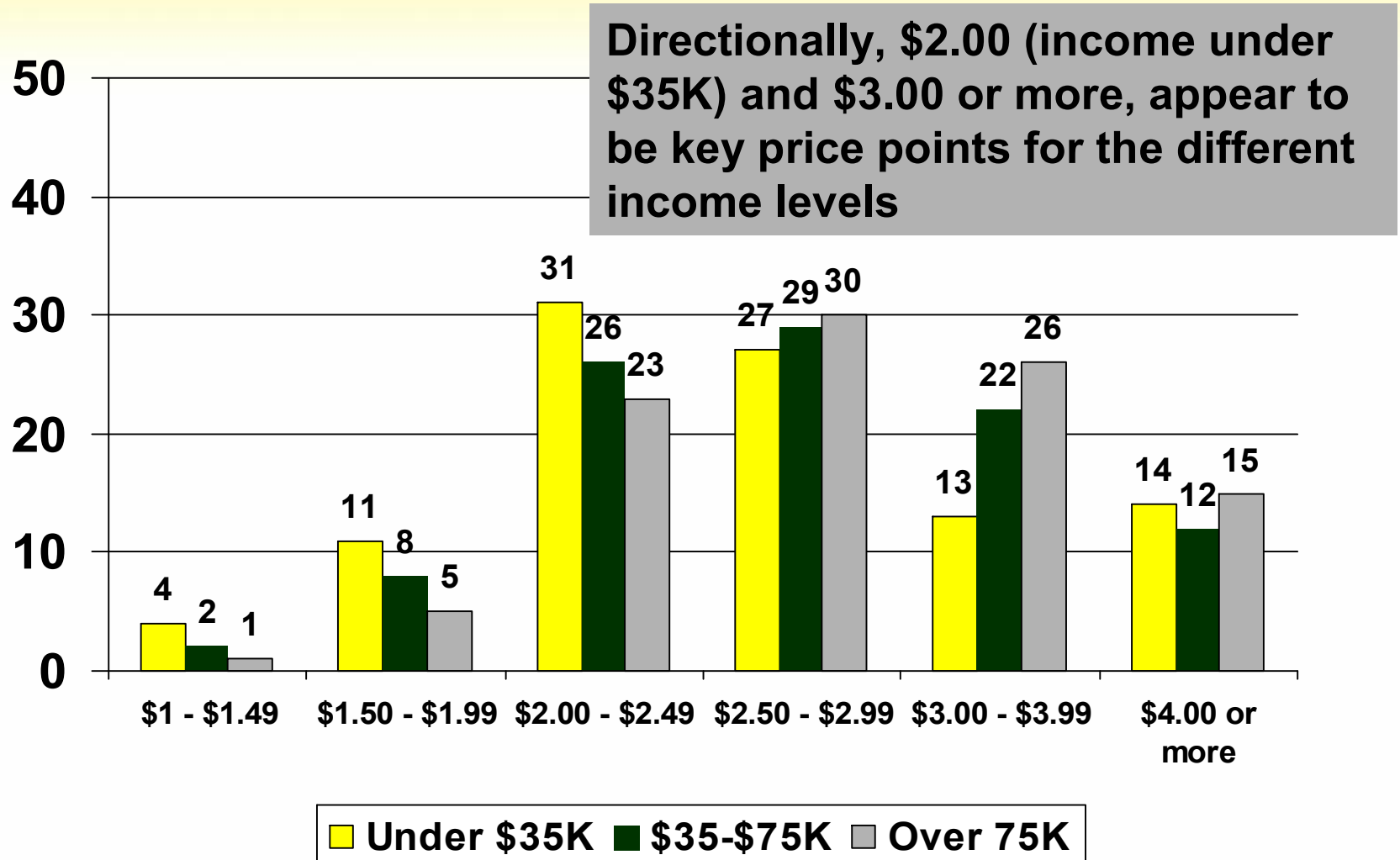
Has price ever been a barrier: All buyers



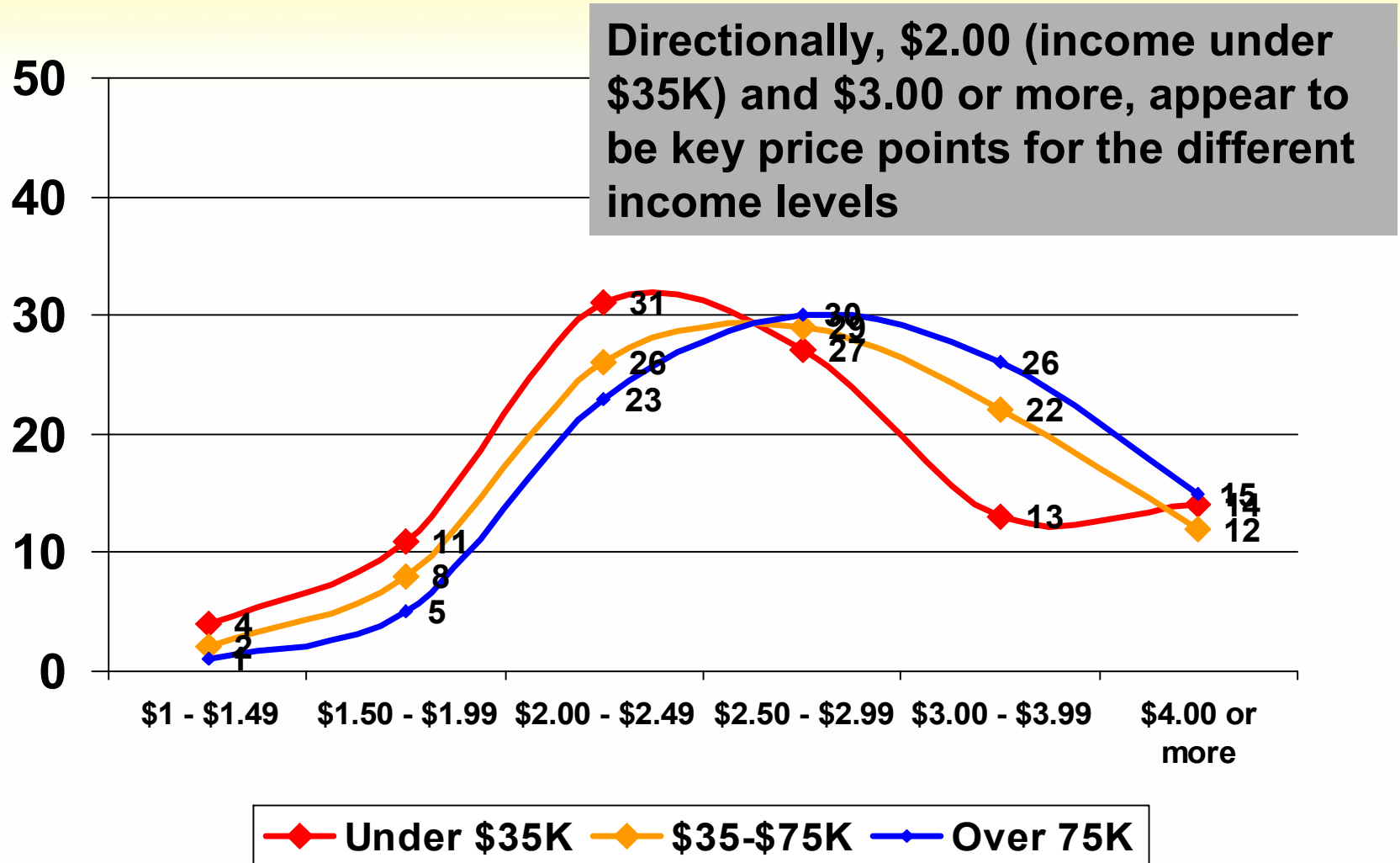
Point at which price is seen as expensive: All who ever buy



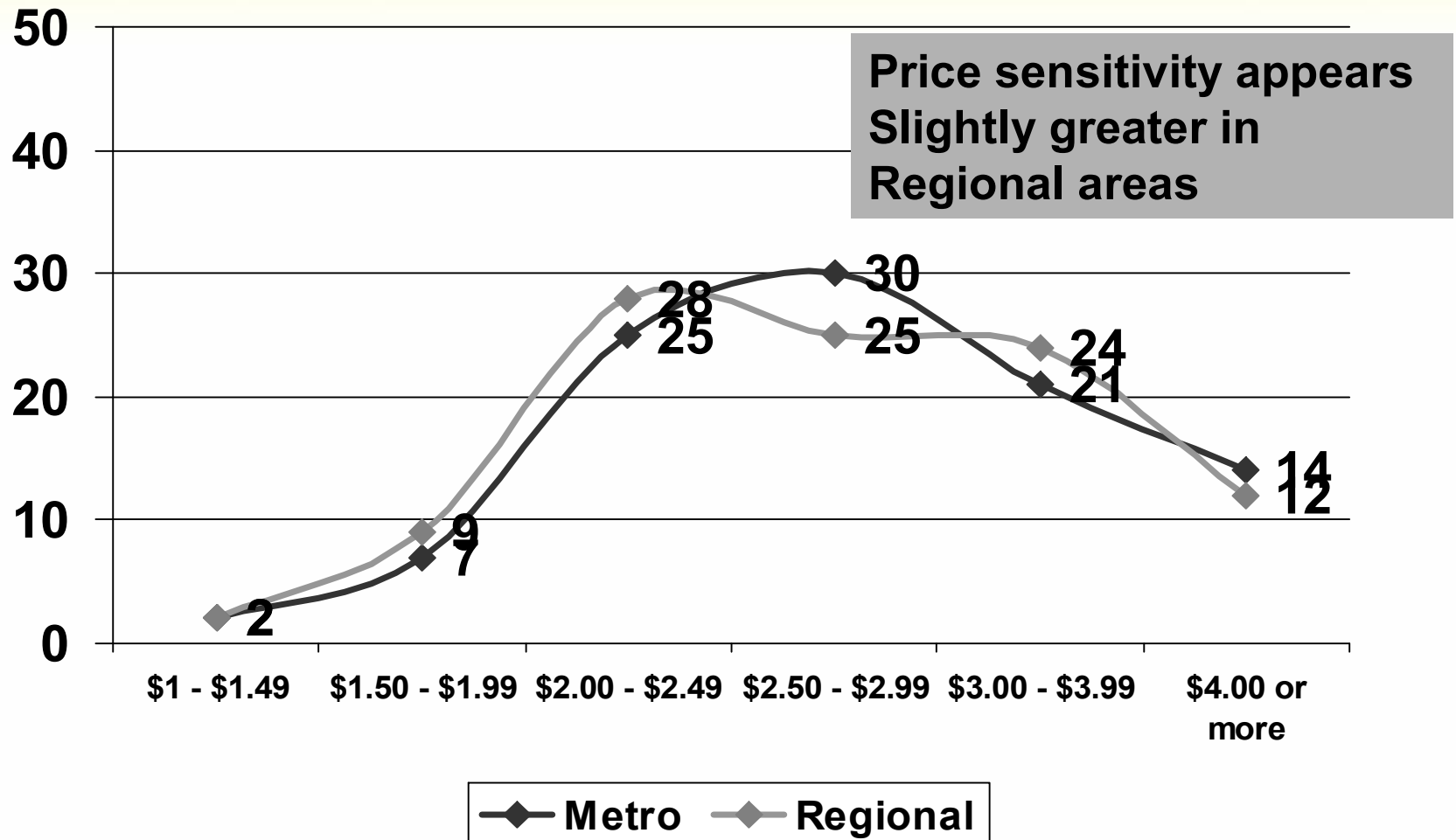
Point at which price is seen as expensive by income: All who ever buy



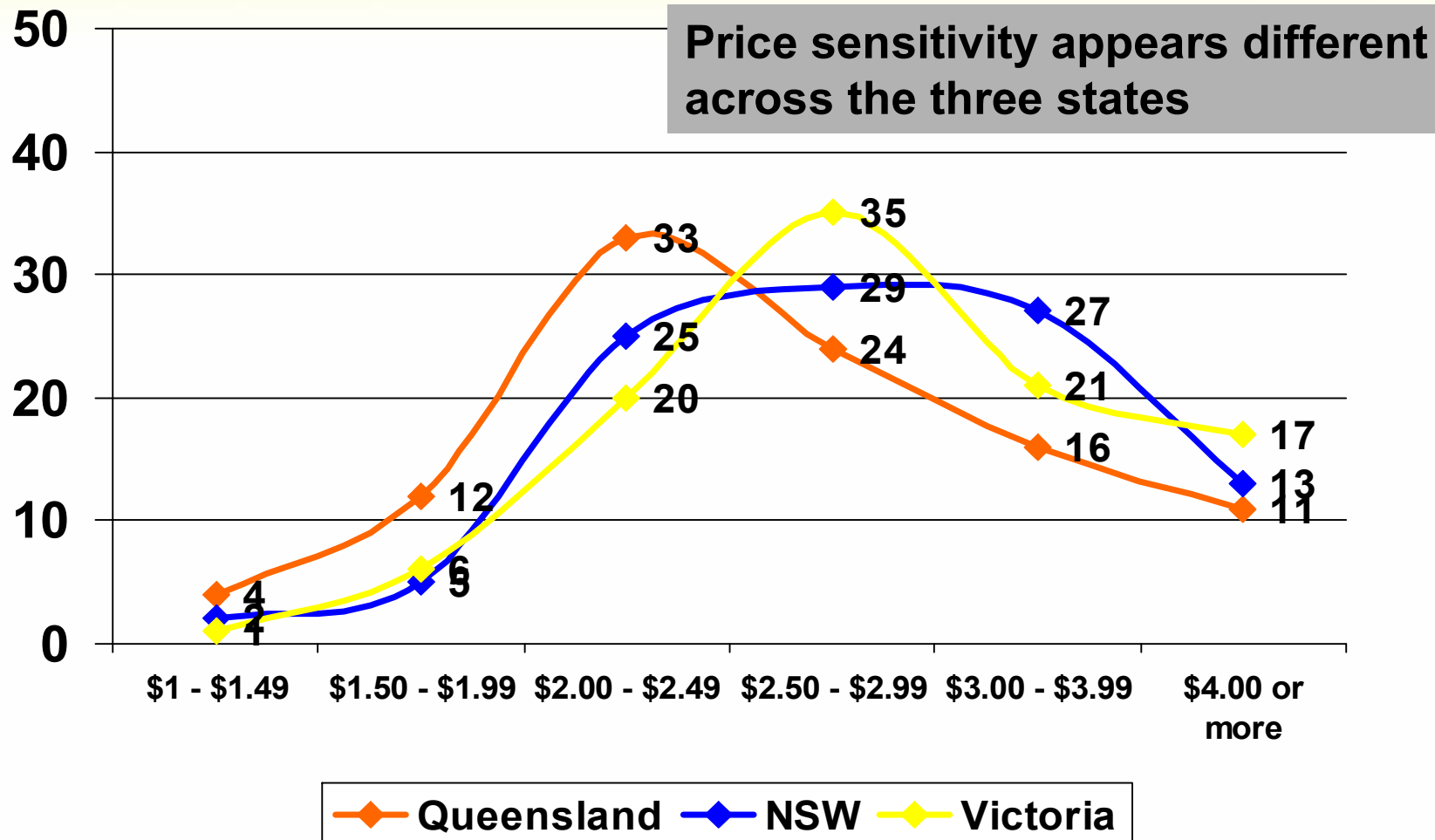
Point at which price is seen as expensive by income: All who ever buy



Point at which price is seen as expensive by key States: All who ever buy



Point at which price is seen as expensive by key States: All who ever buy (in three key states)

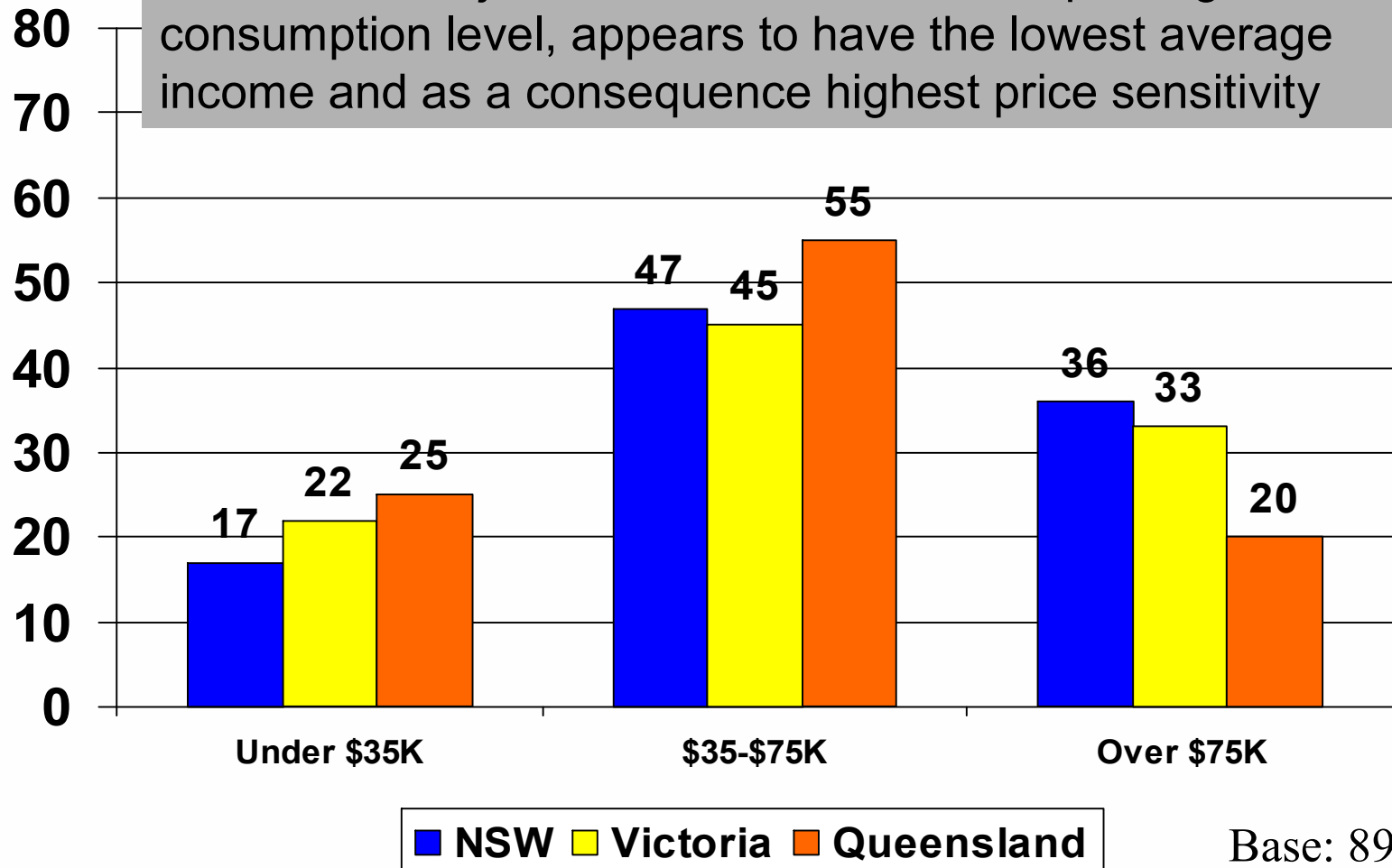


Base: 899



Income levels by State: All who ever buy

Price sensitivity appears to follow the relative income levels in the three major states. Queensland, despite highest consumption level, appears to have the lowest average income and as a consequence highest price sensitivity



Base: 899

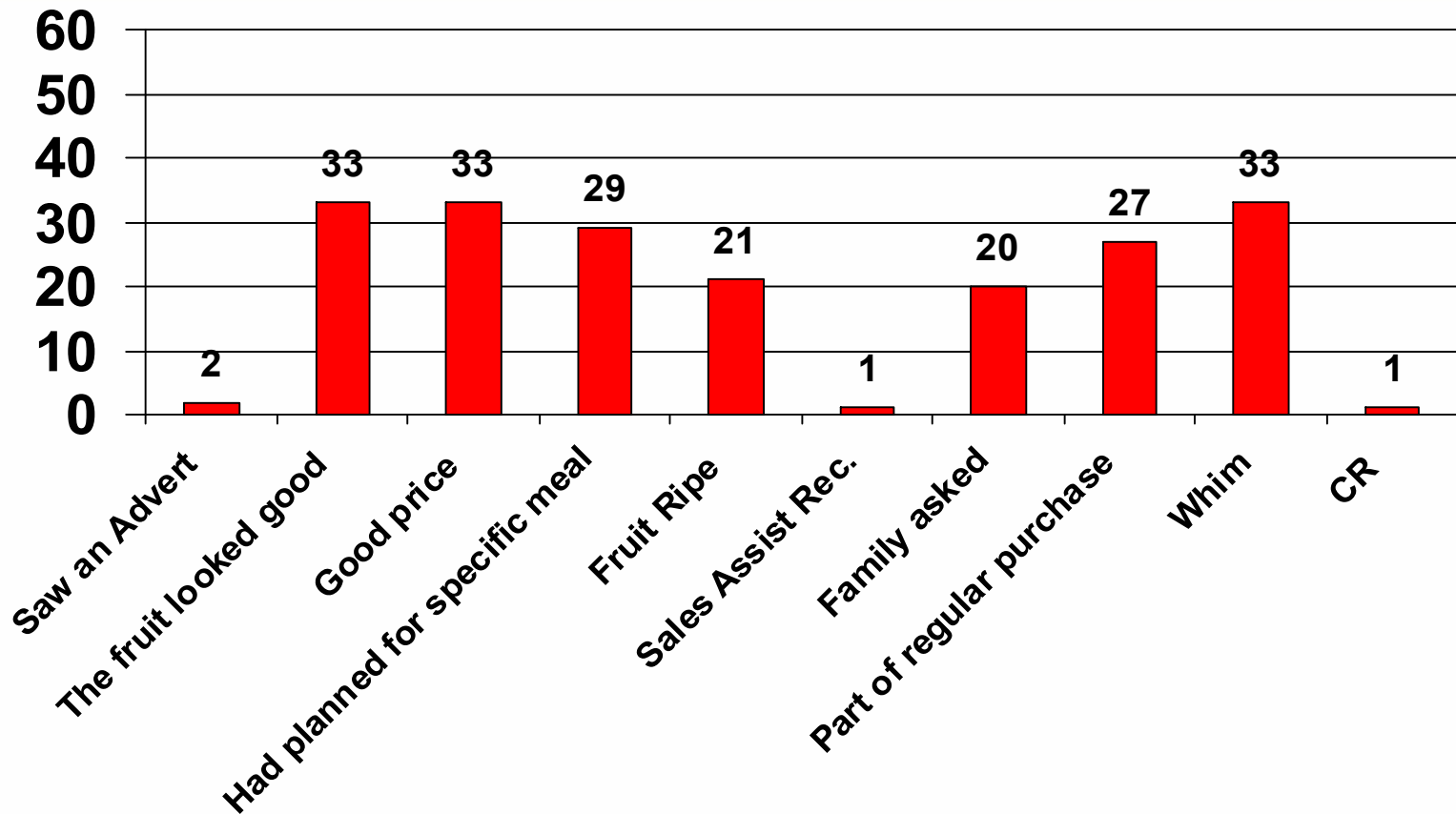


Pricing issues summary

- Most 67% had paid between \$1.00 and \$2.00 in the last months
- Price had certainly been a barrier for many (53%) at one time or another
- Greater price sensitivities appear to exist amongst:
 - those earning less than \$35K
 - Queensland and to a lesser extent Victoria

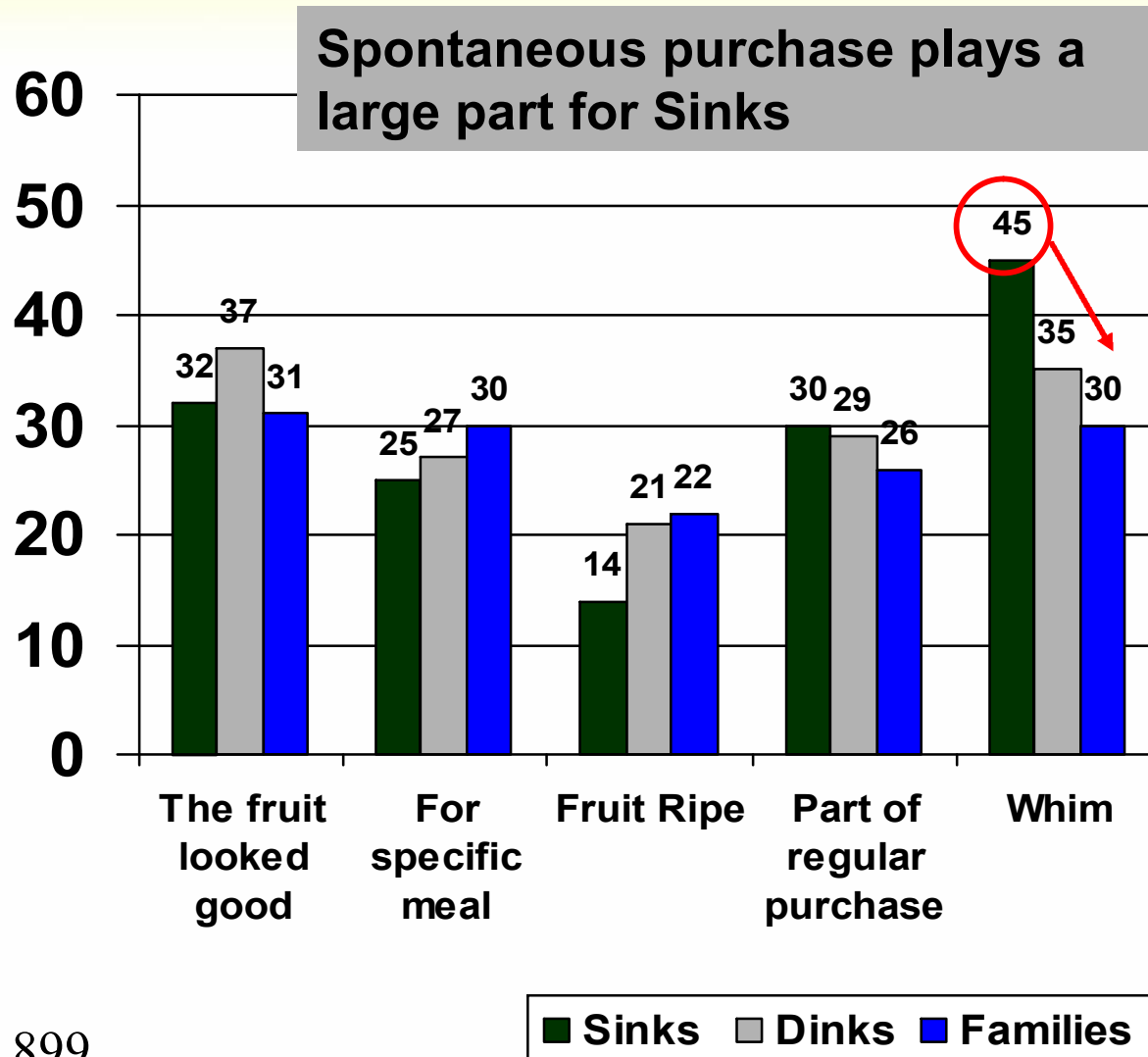
Reasons for Purchase

Influences on last Purchase: All buyers



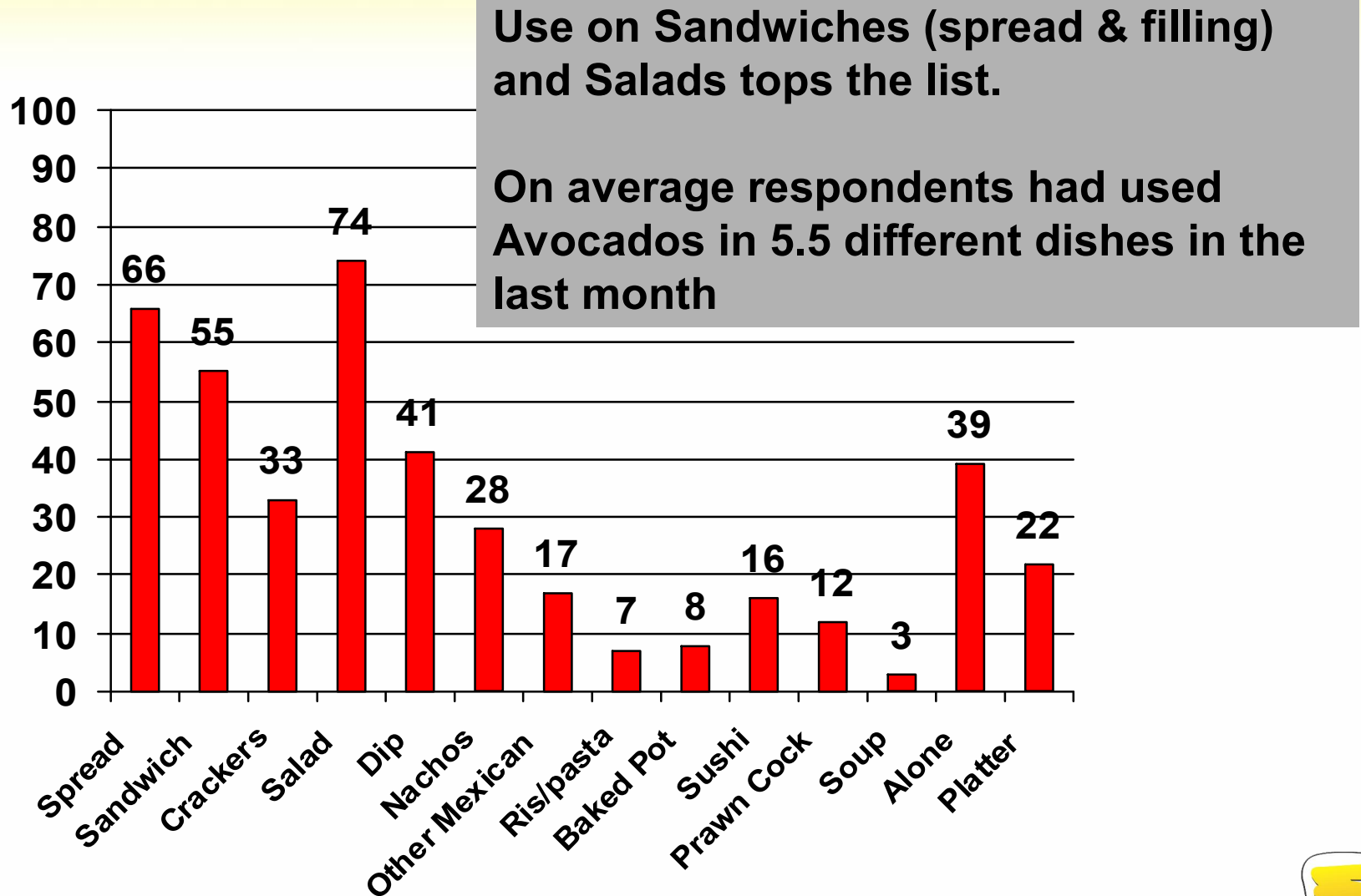
Key influences on last Purchase by lifestage:

All buyers

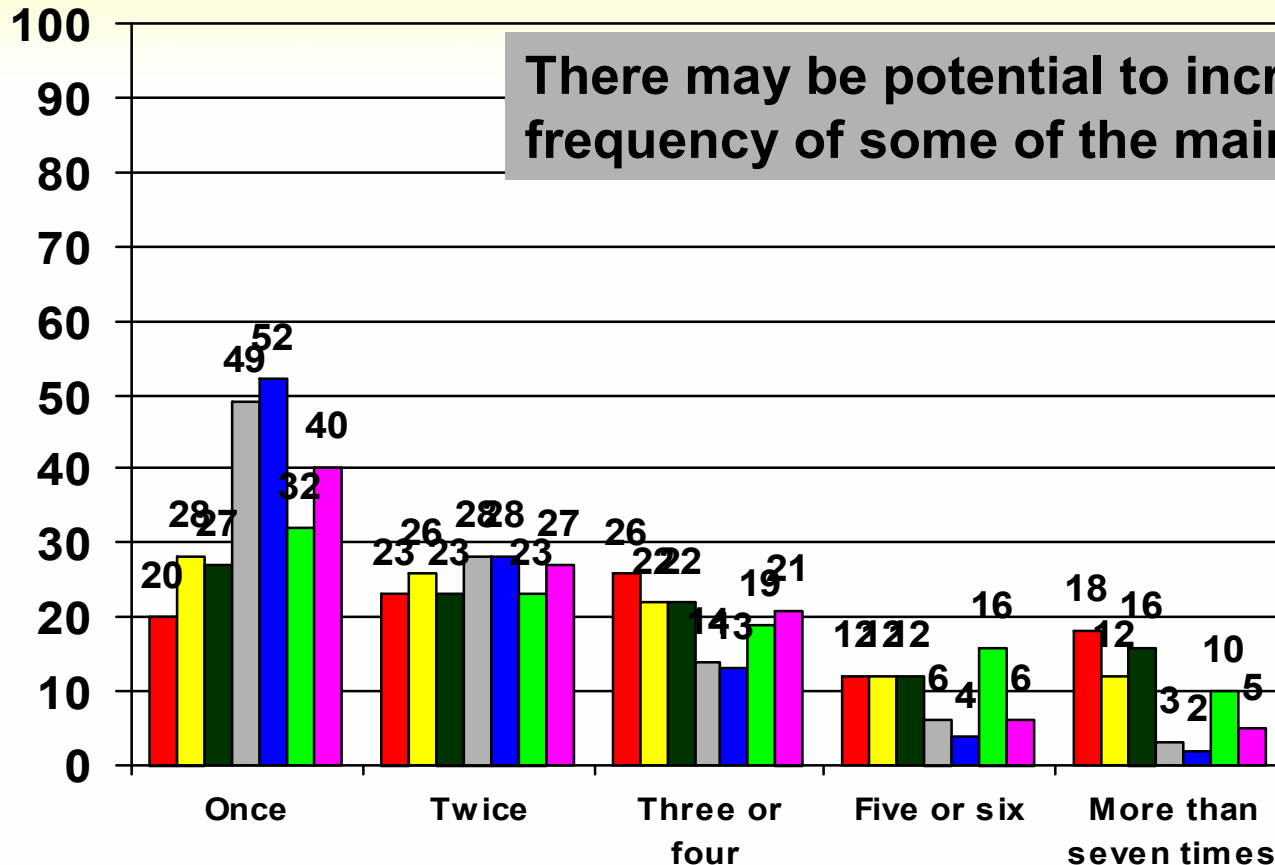


Avocado Usage

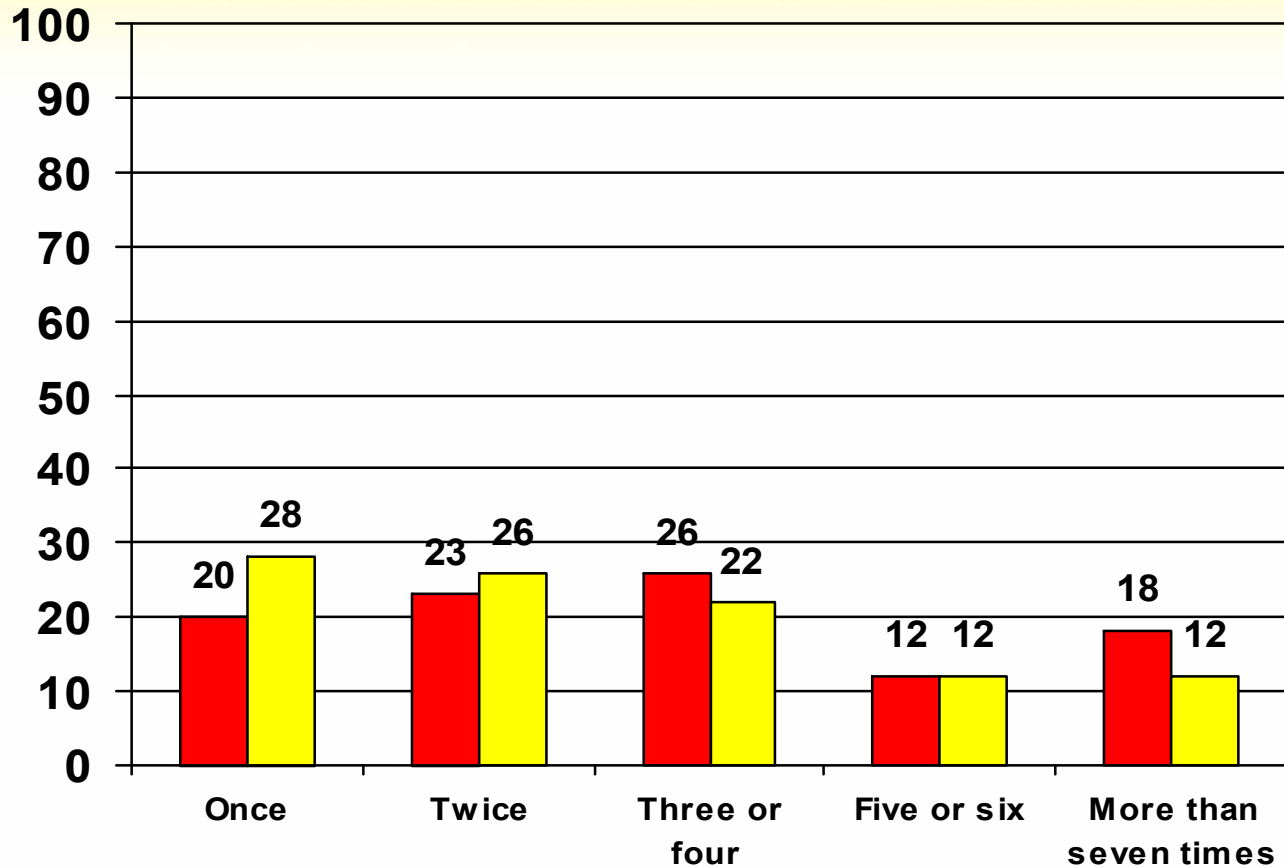
Avocado use in the last month: All buyers in the last month (excluding others)



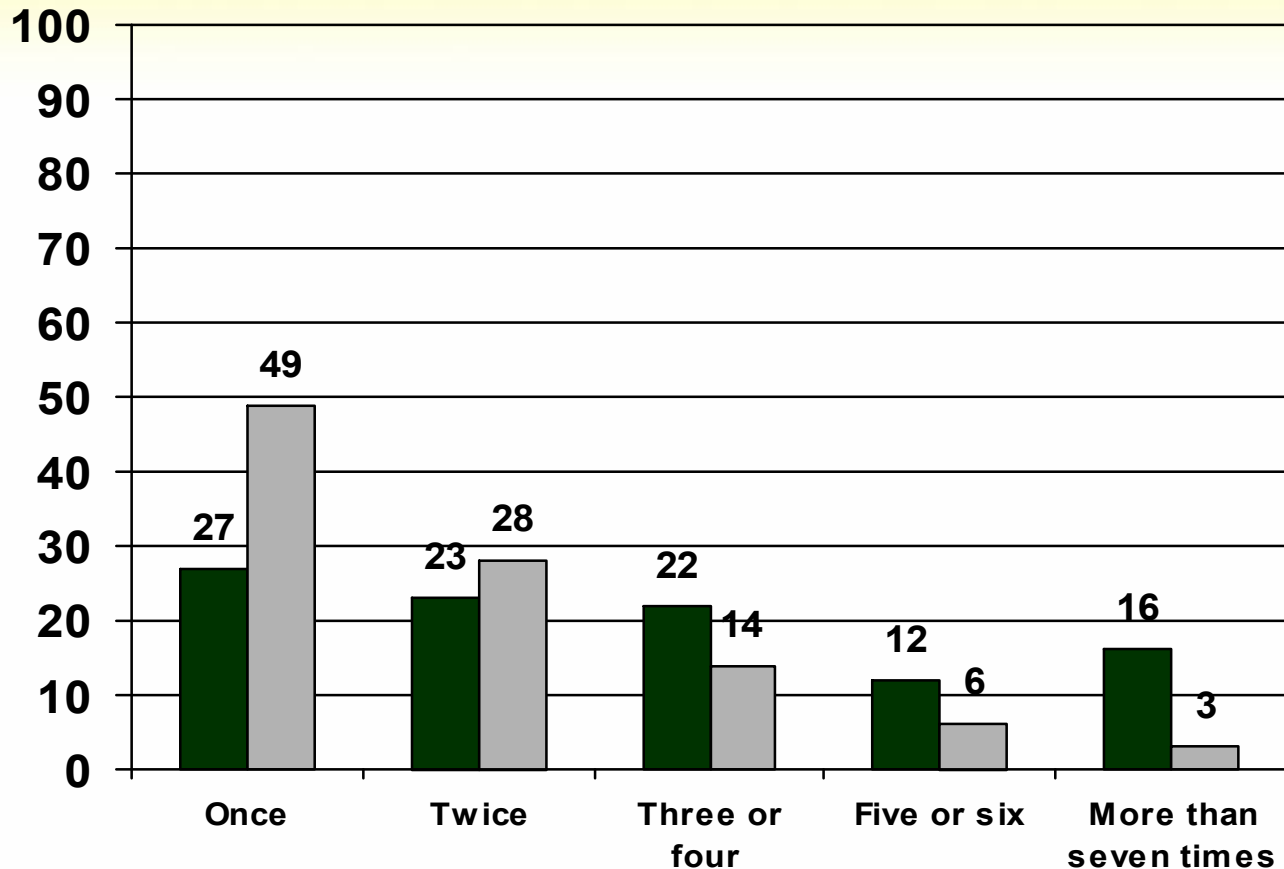
Avocado use in the last month: All users in the last month of each particular dish (excluding others)



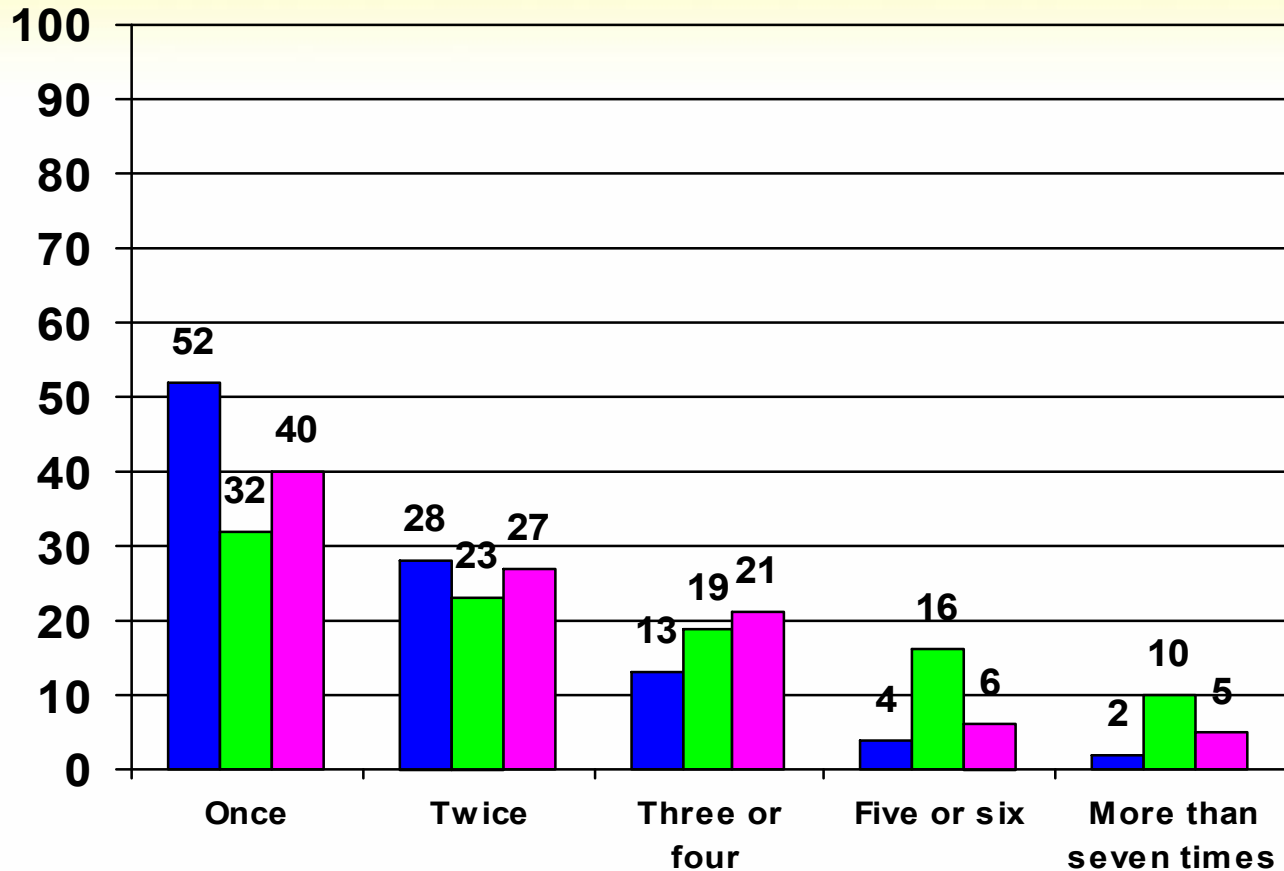
Avocado use in the last month: All users in the last month of each particular dish



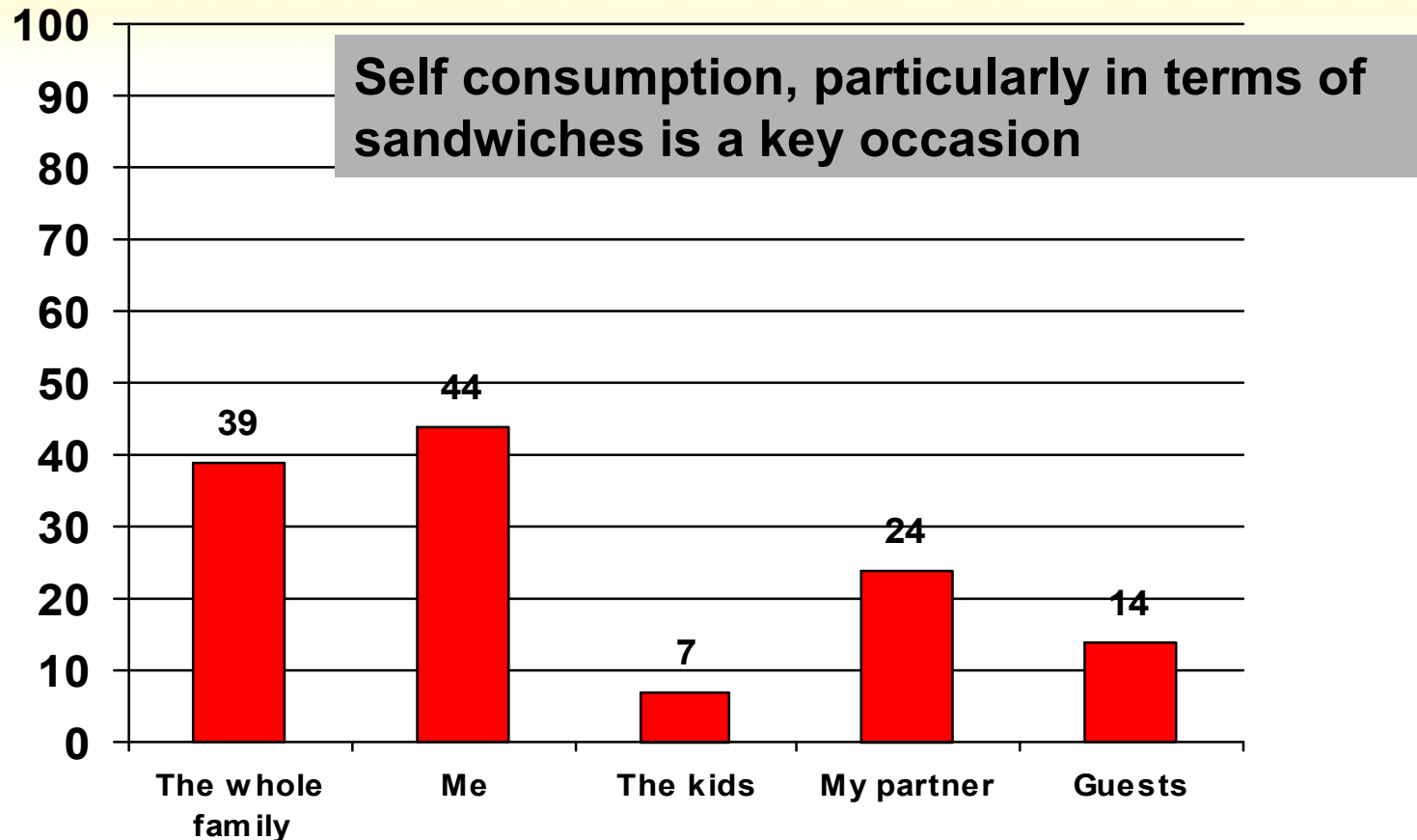
Avocado use in the last month: All users in the last month of each particular dish



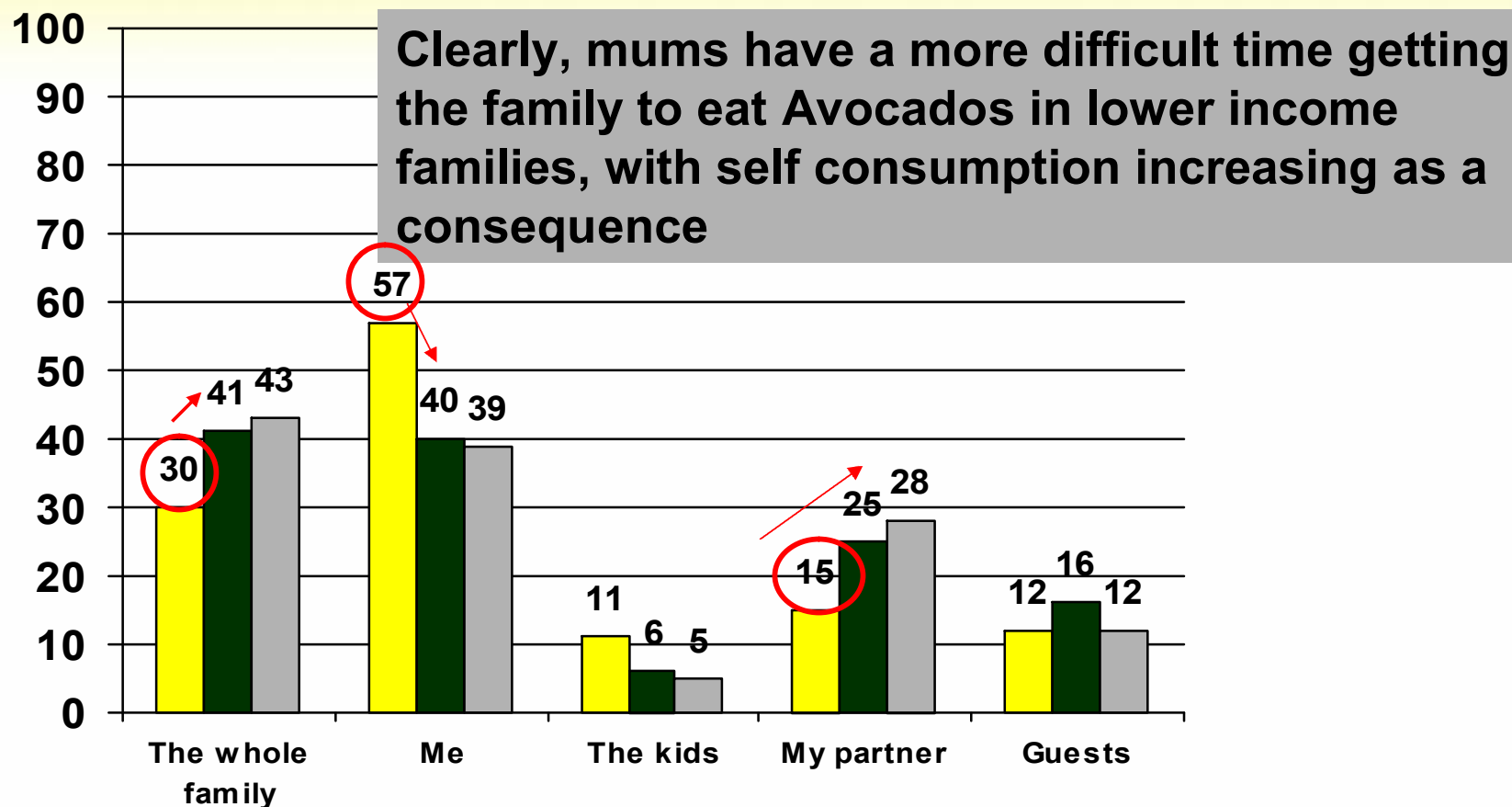
Avocado use in the last month: All users in the last month of each particular dish



Who dishes were mainly made for in the last month: All buyers in the last month



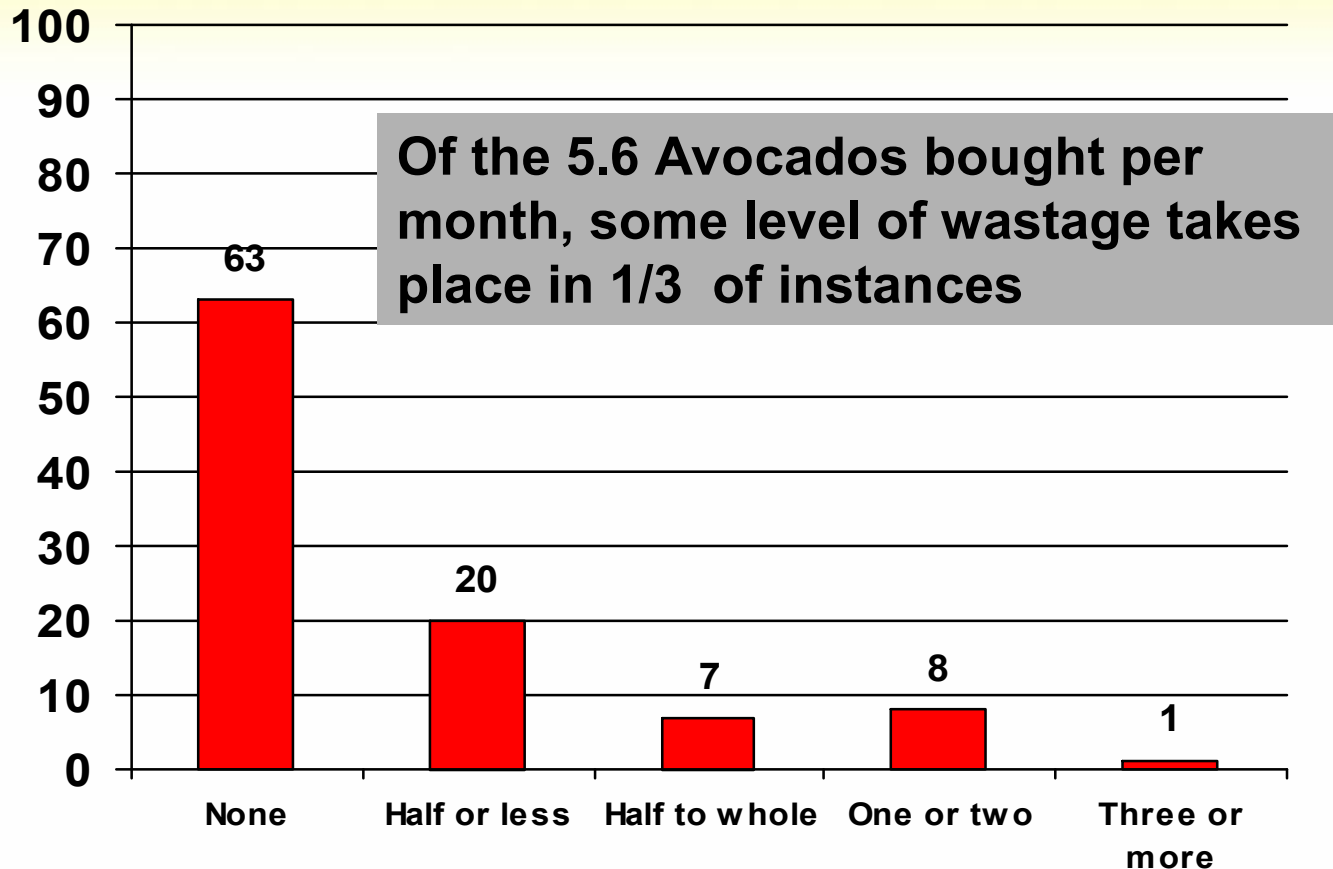
Who dishes were mainly made for in the last month by income: All buyers in the last month



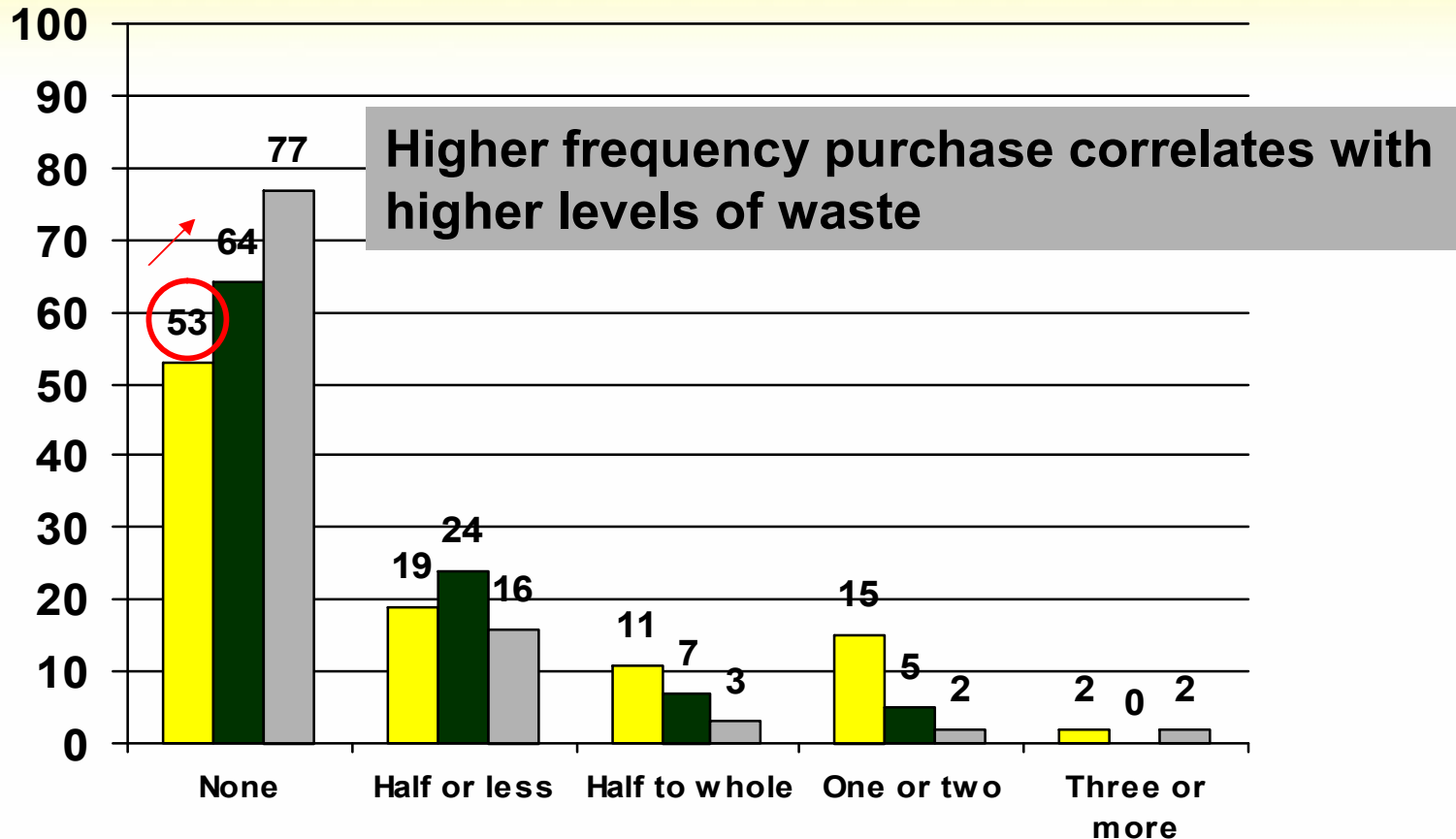
Avocado problems

Wastage in the last month:

All buyers in the last month

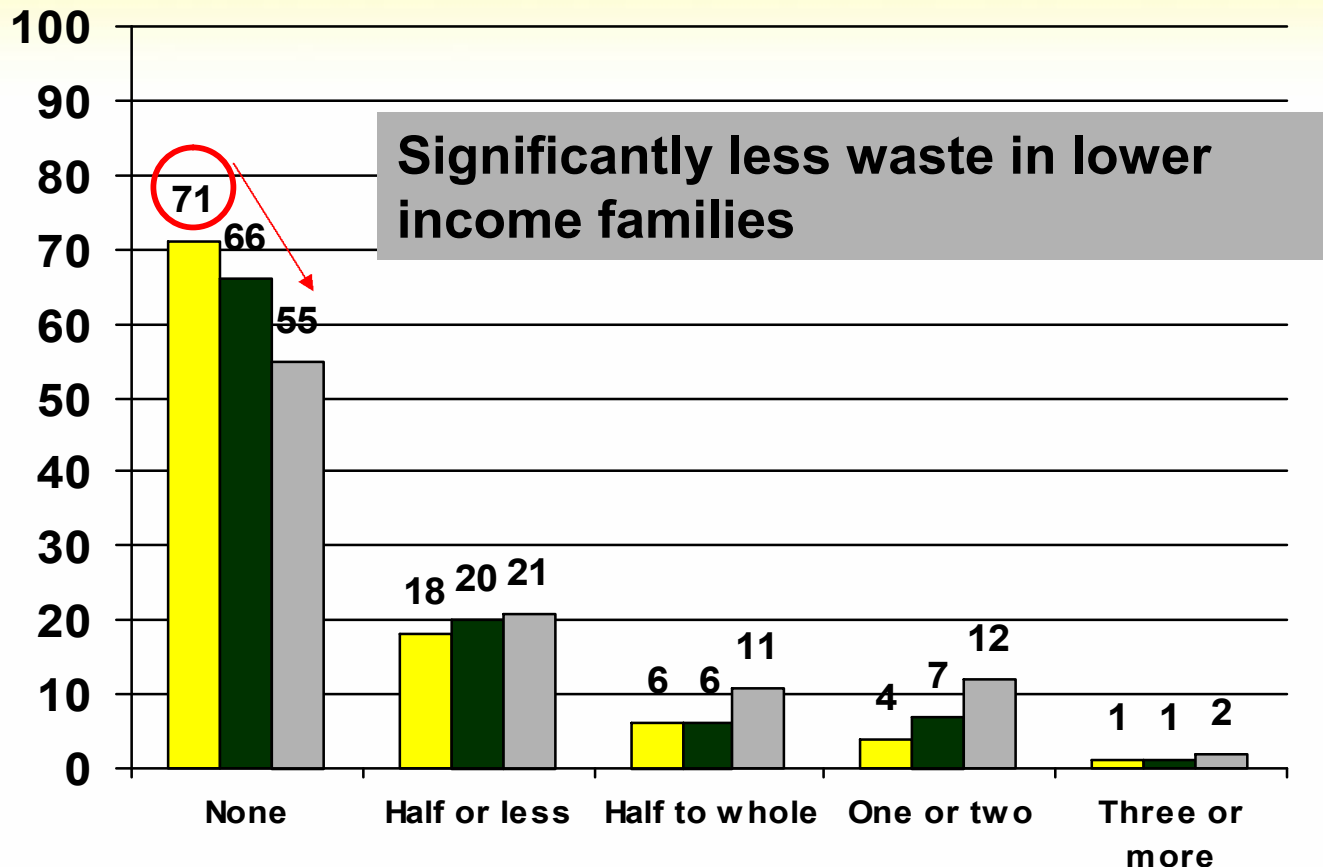


Wastage in the last month by frequency of purchase: All buyers in the last month



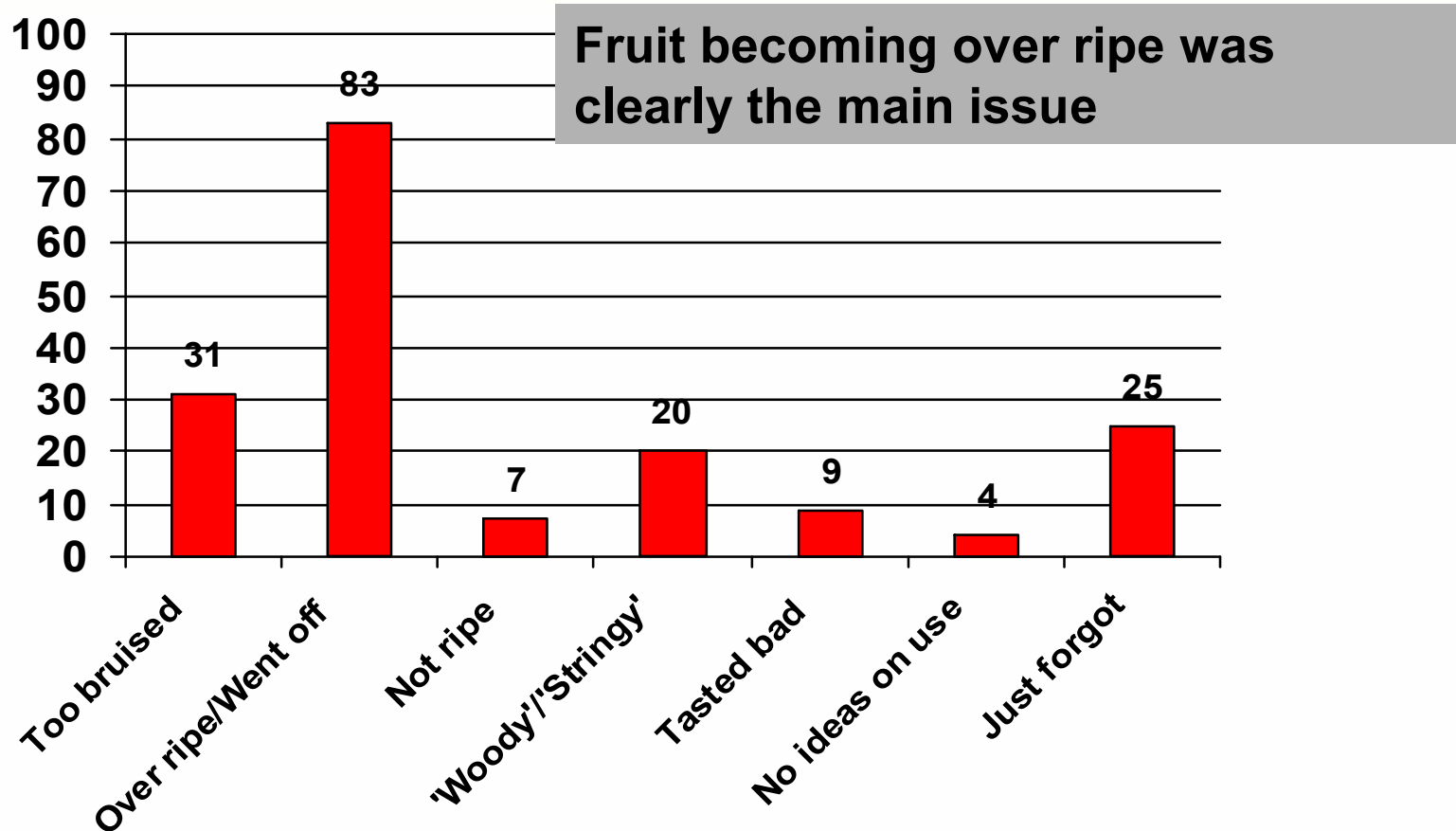
Wastage in the last month by income:

All buyers in the last month



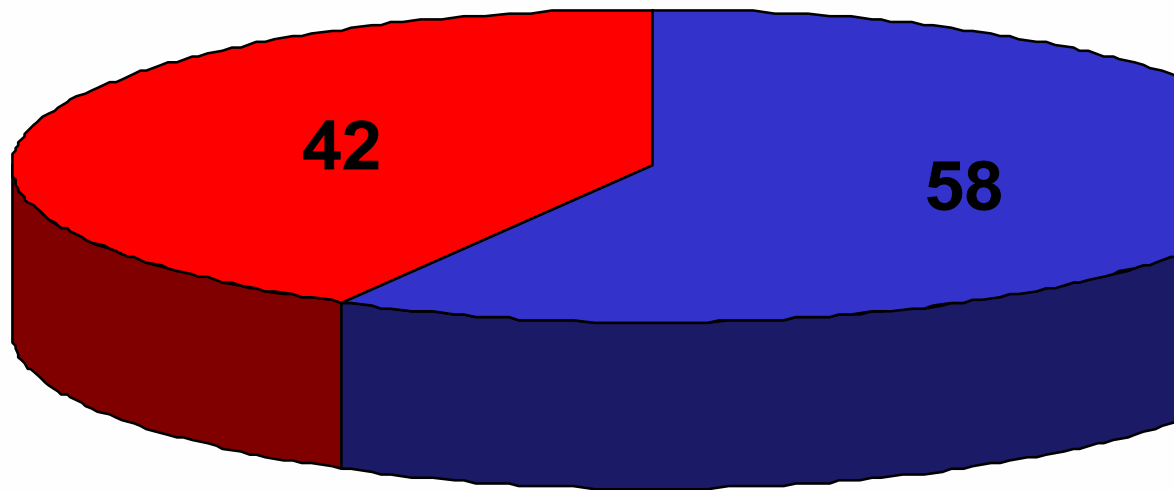
Reasons for wastage in the last month:

All who had bought in the last month and experienced waste



Avocado Knowledge

Awareness of different types: All respondents



Awareness increases with age (68% over 55 yrs vs 47% 18-24), income (62% over \$75K vs 54% under \$35K) and purchase frequency (75% high freq vs 45% very occasional) usage.

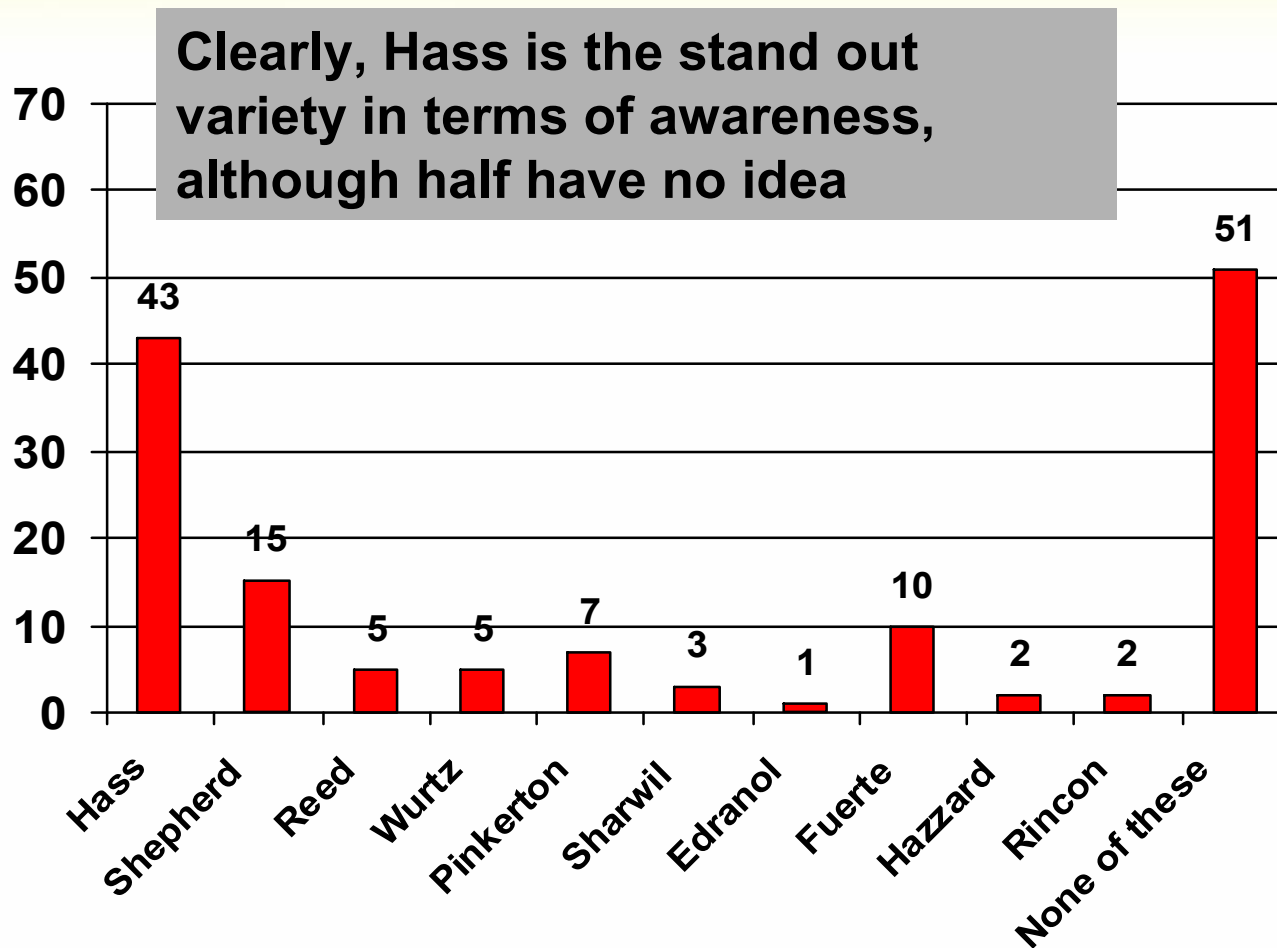
Those in Queensland also exhibited higher awareness (68% vs 57% Vic, 55% NSW)

■ **Aware** ■ **Unaware**

Base: 1,000



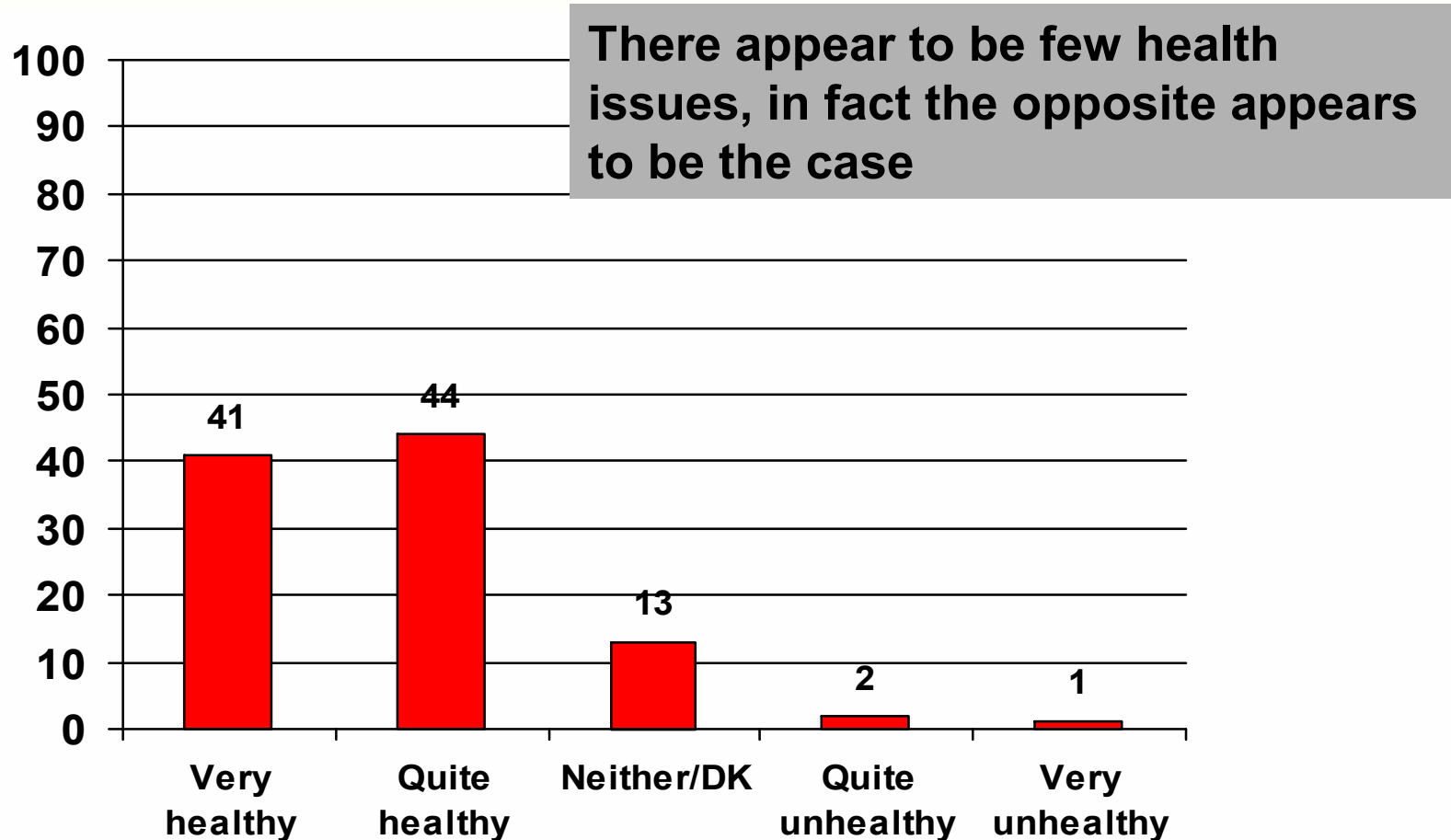
Prompted awareness of avocado types by name: All respondents



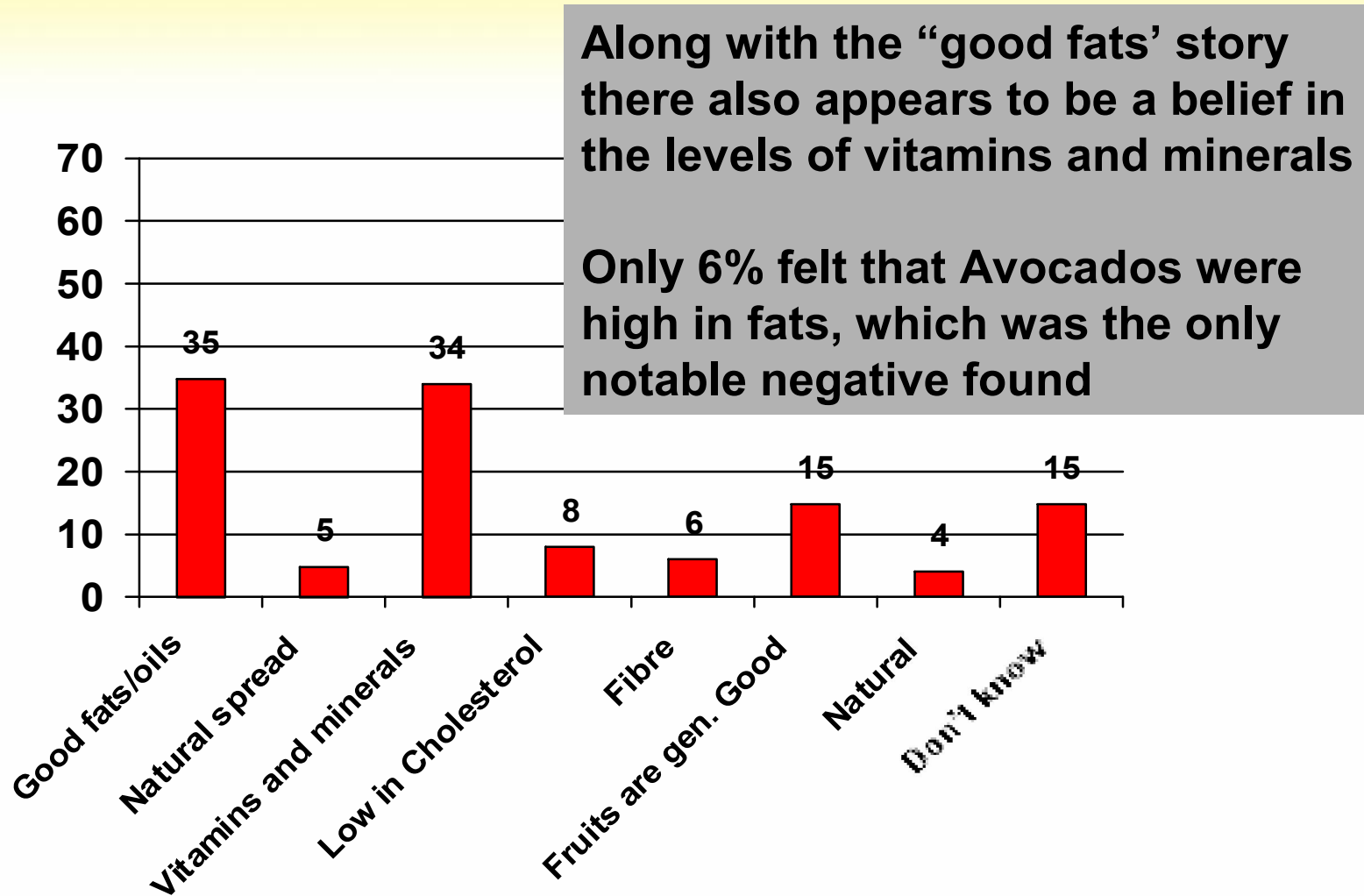
Attitudes to Avocado

Attitude to Avocados in terms of health:

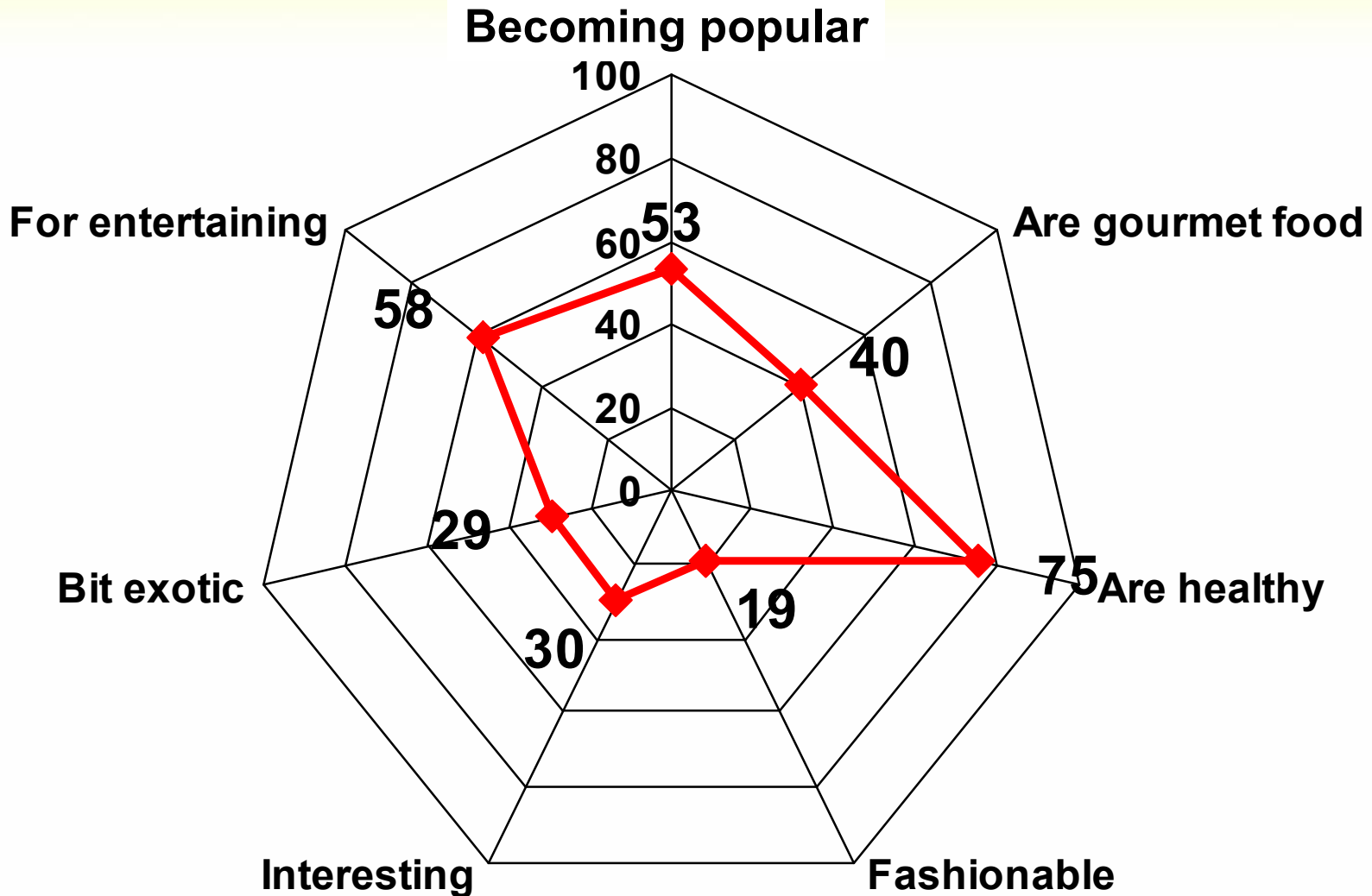
All respondents



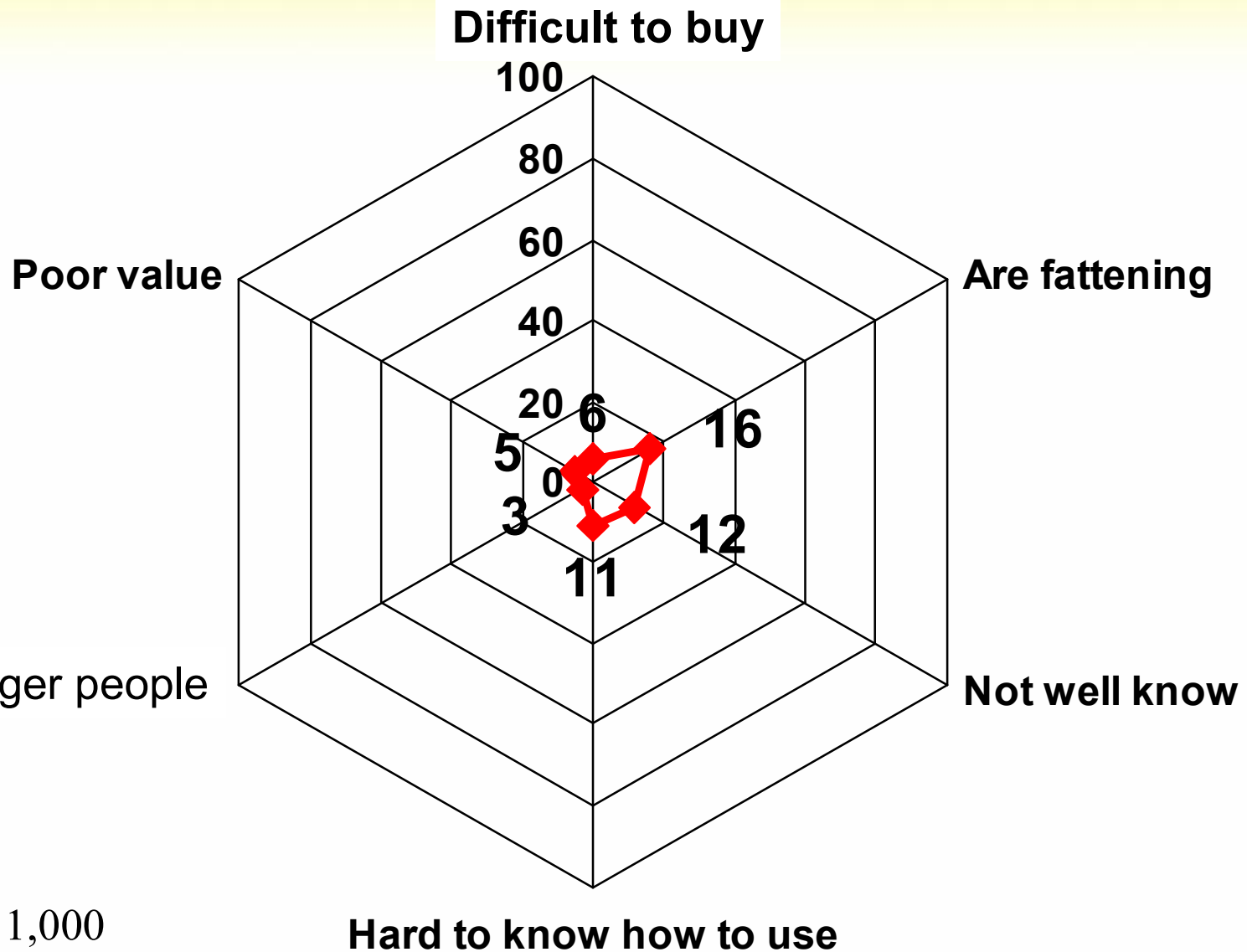
Health benefits of Avocados: All who thought Avocados were healthy



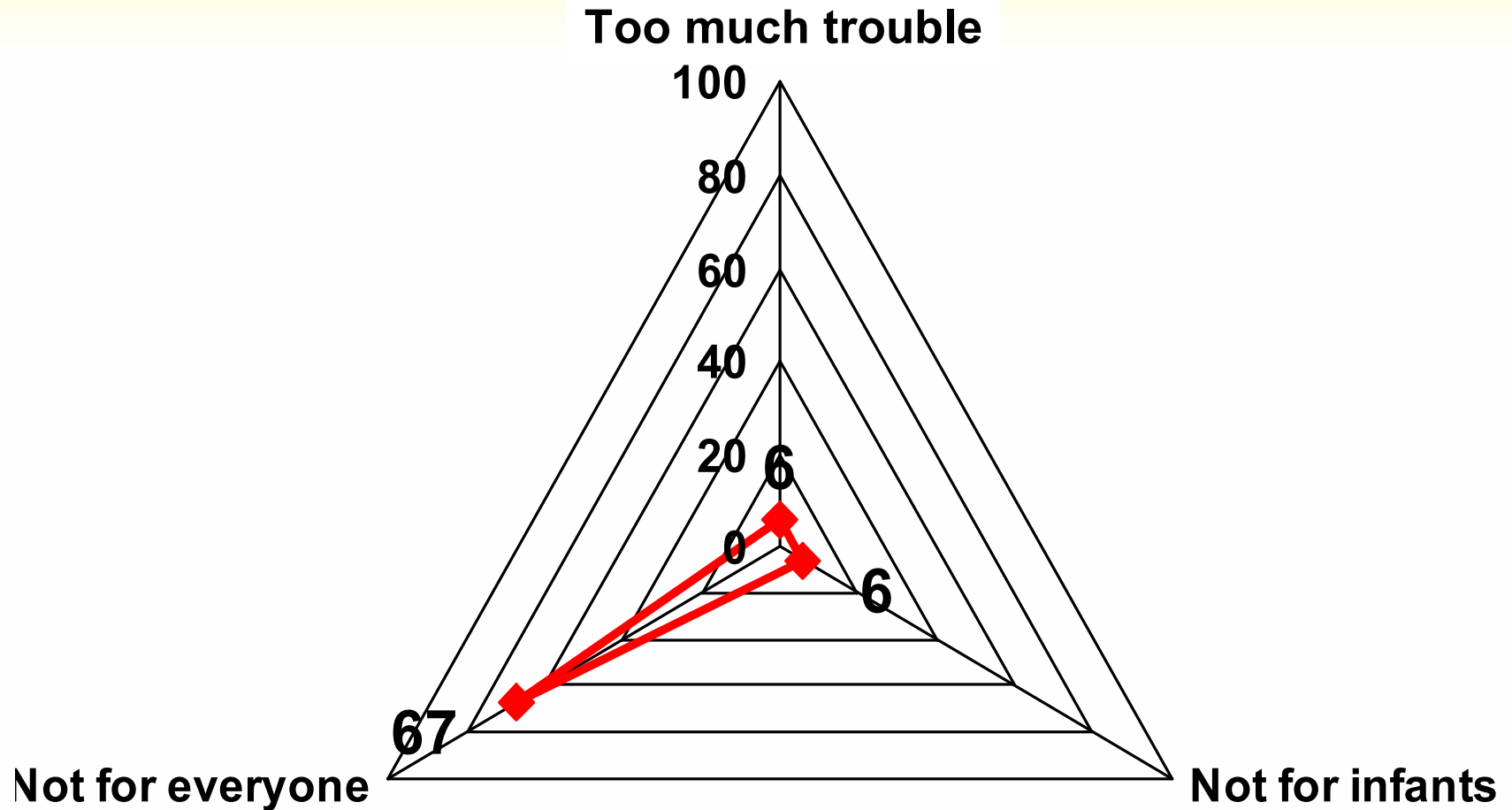
Attitude to Avocados: All respondents



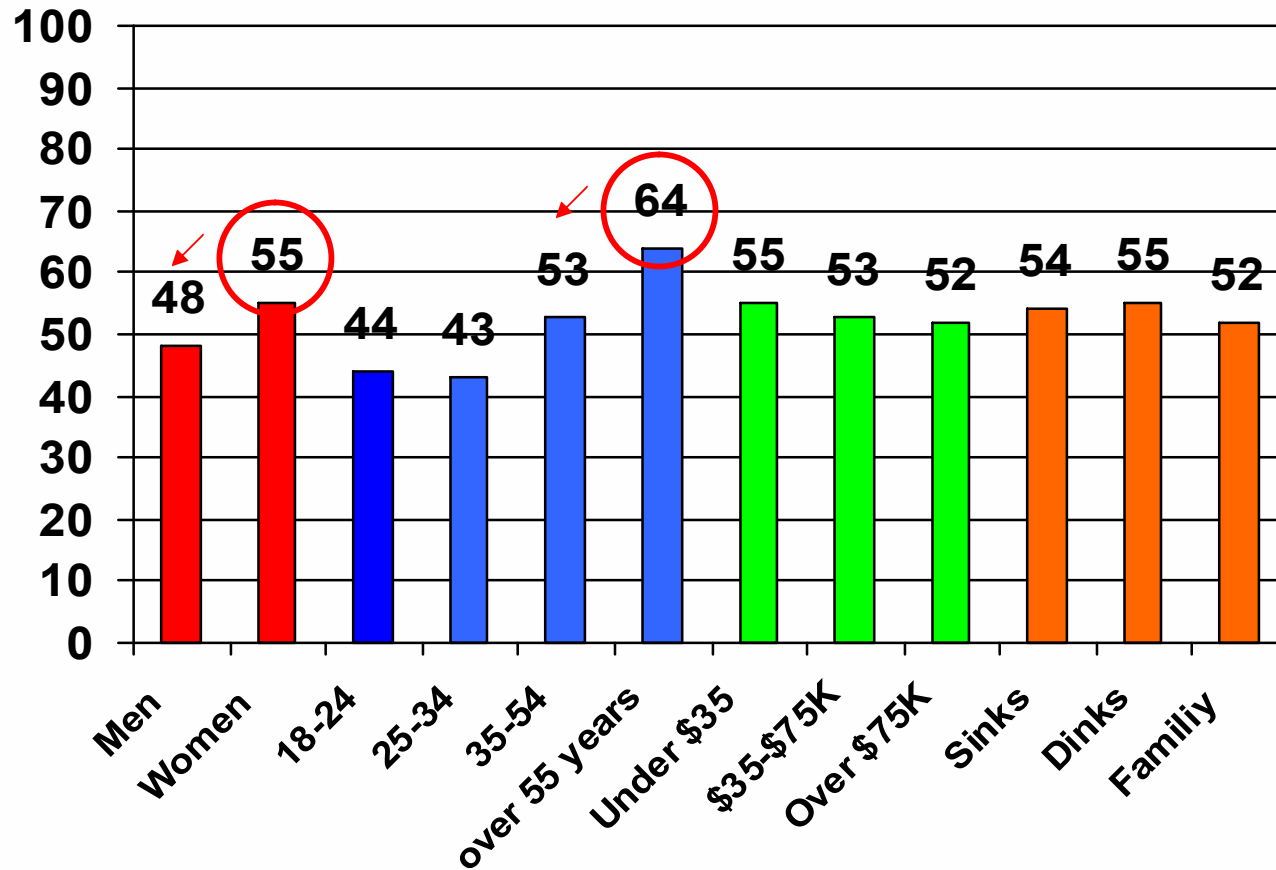
Attitude to Avocados: All respondents



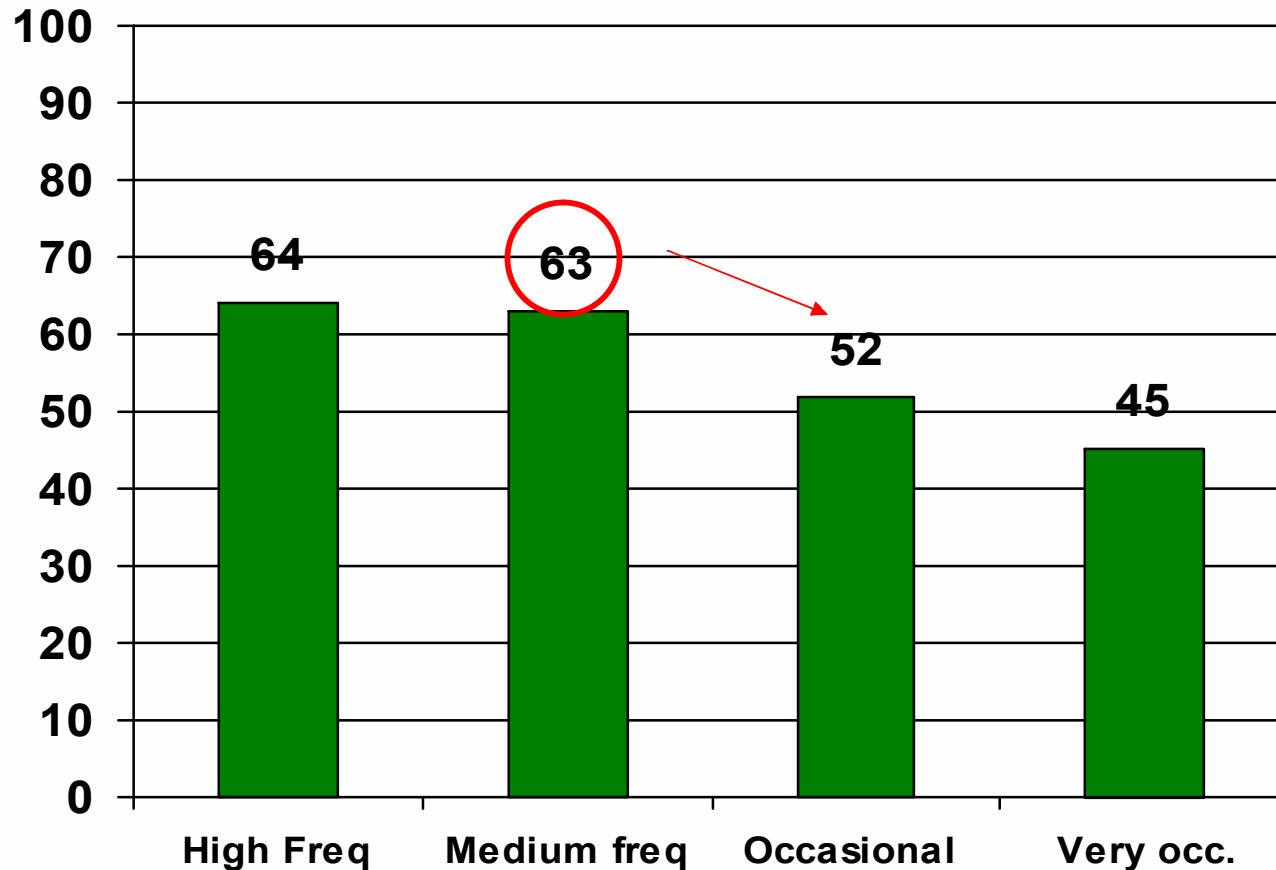
Attitude to Avocados: All respondents



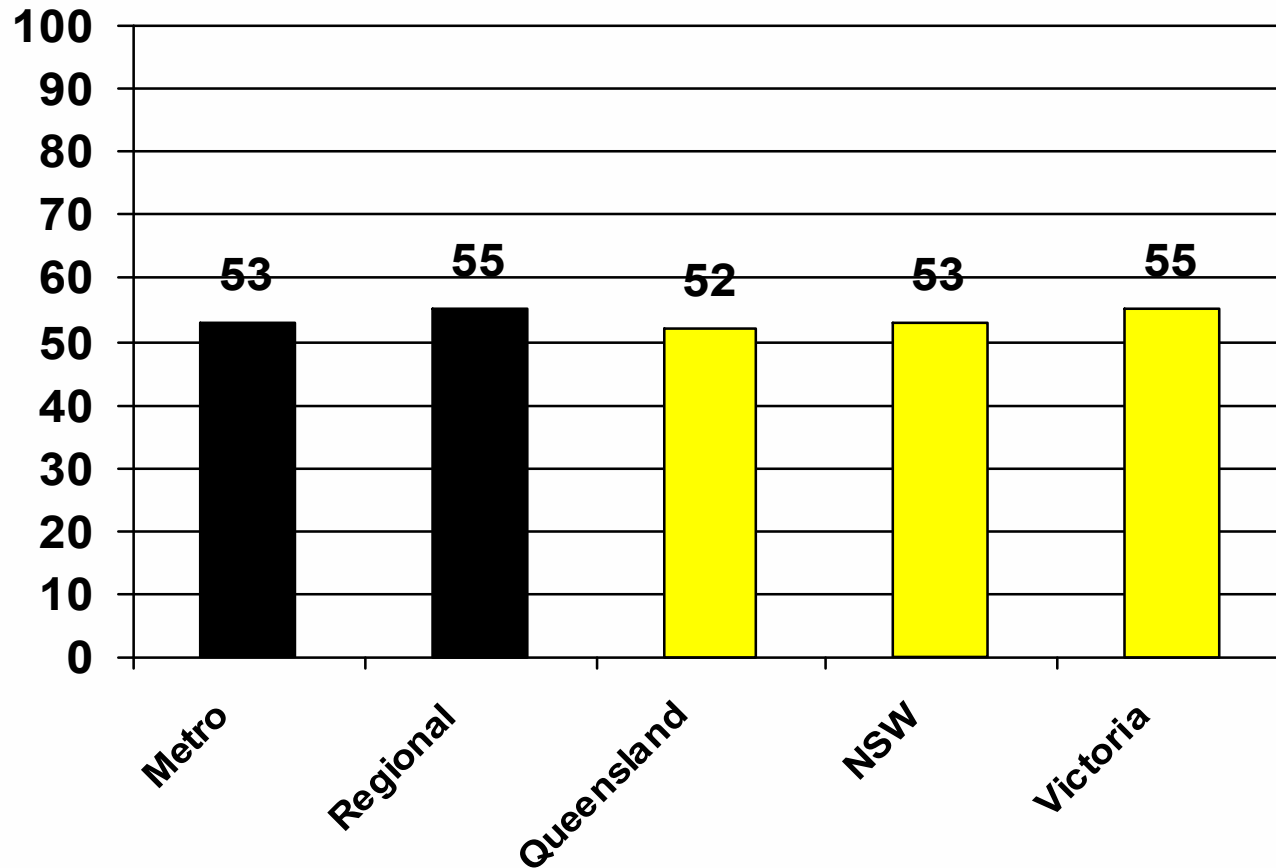
Attitude to Avocados by demographics - “Becoming Popular”: All respondents



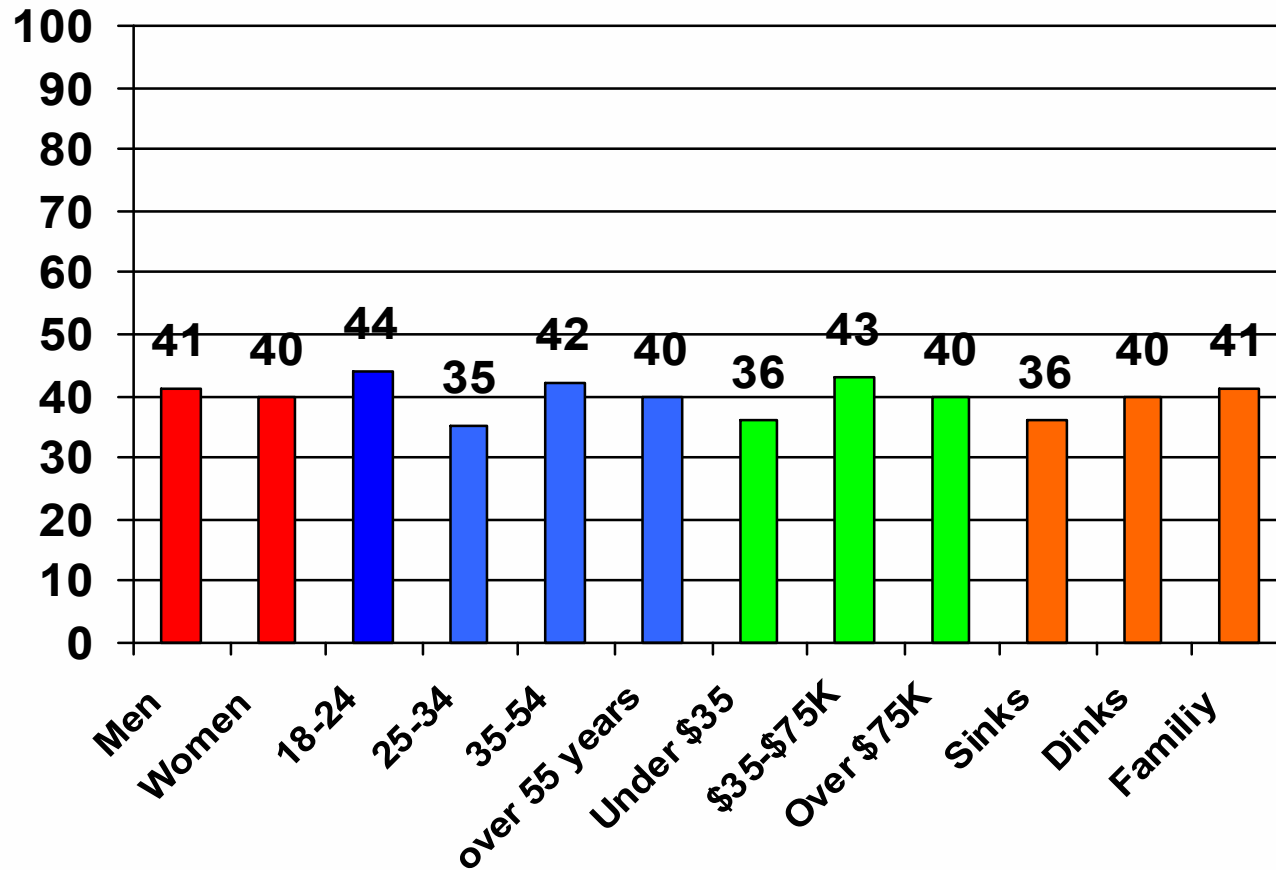
Attitude to Avocados by frequency of purchase - “Becoming Popular”: All respondents



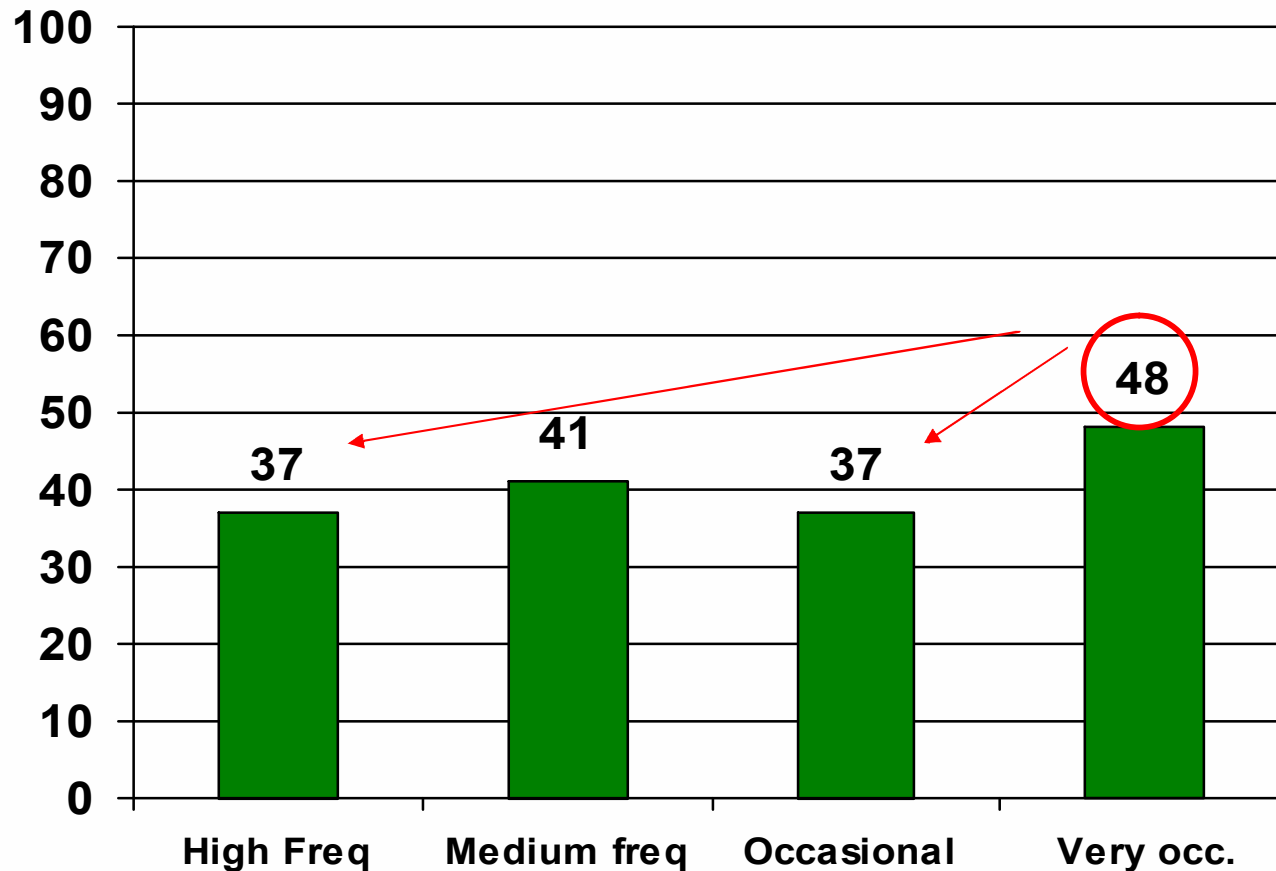
Attitude to Avocados by location - “Becoming Popular”: All respondents



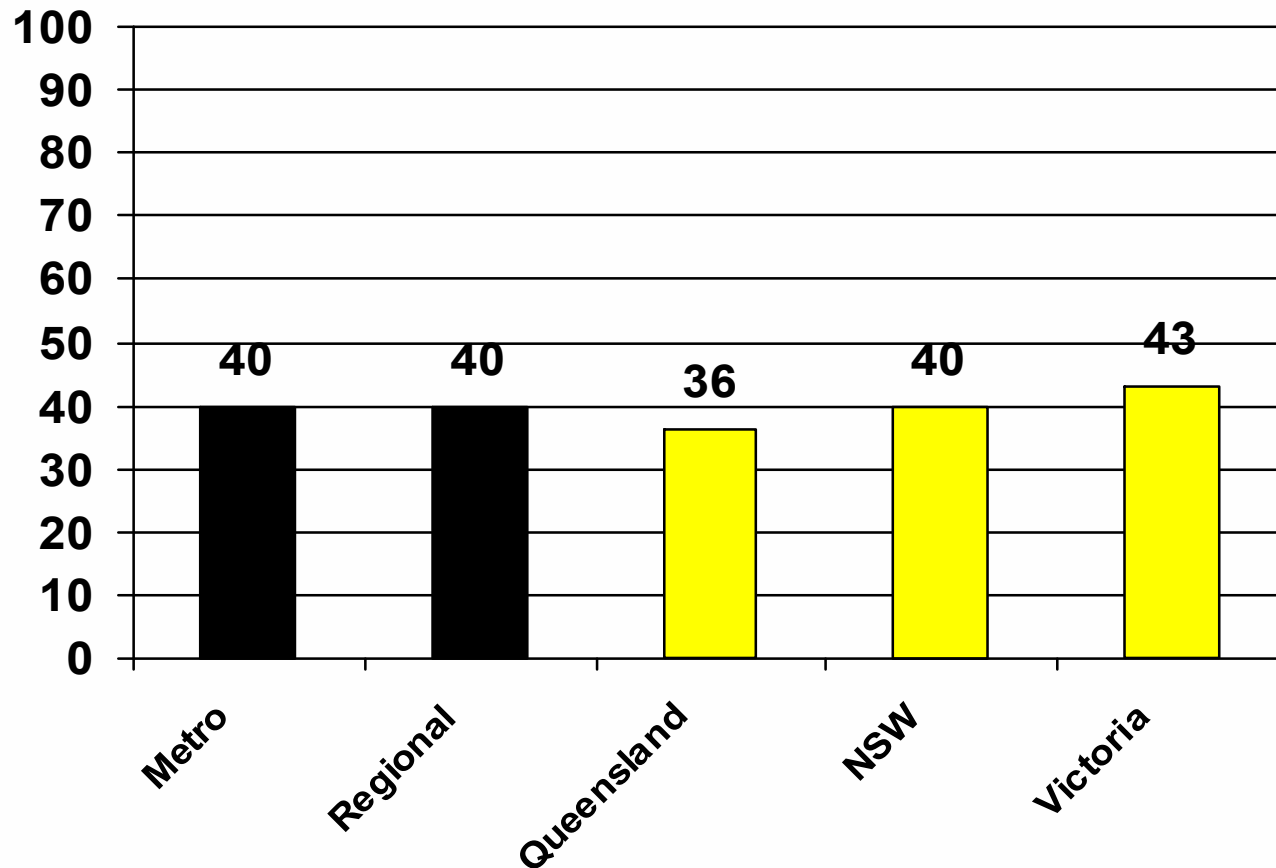
Attitude to Avocados by demographics - “Are Gourmet Food”: All respondents



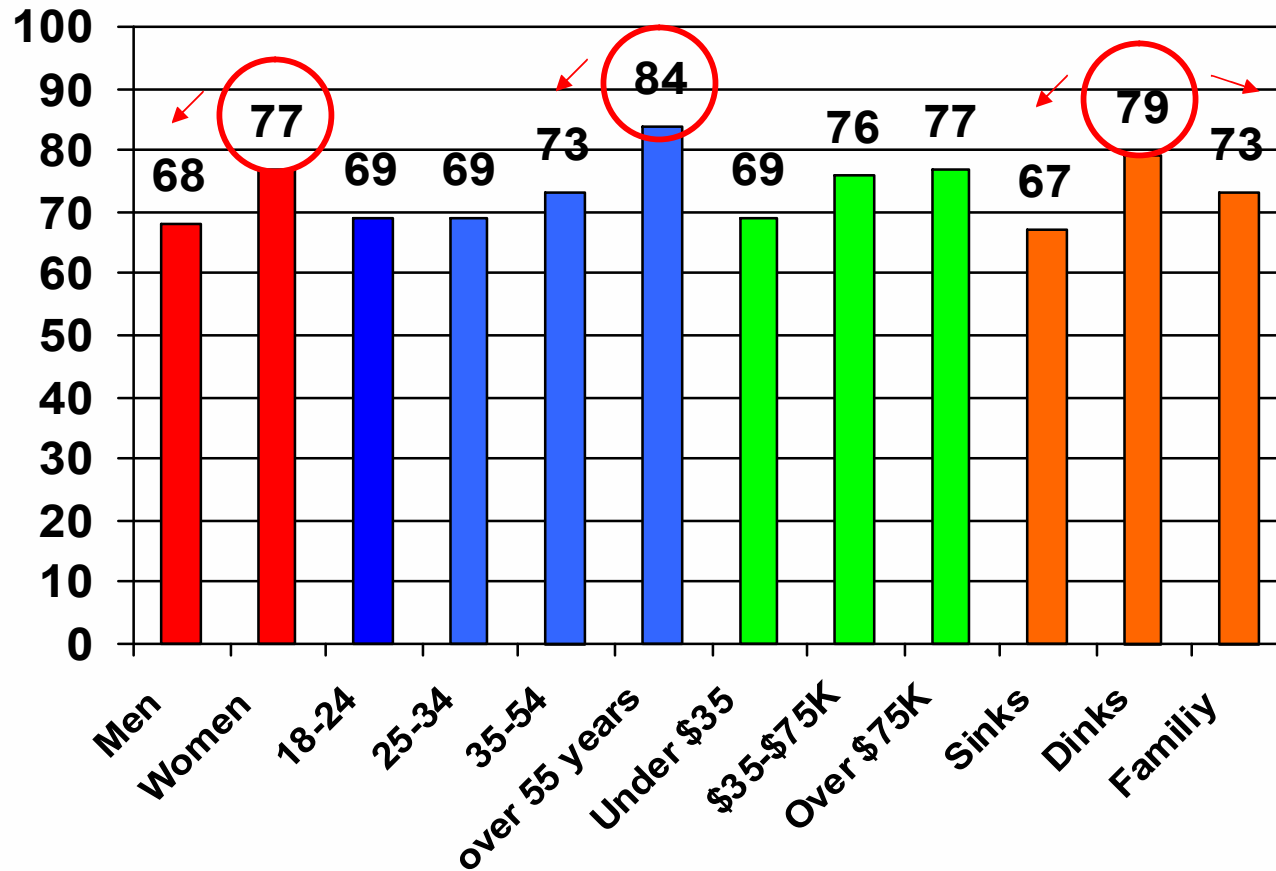
Attitude to Avocados by demographics - “Are Gourmet Food”: All respondents



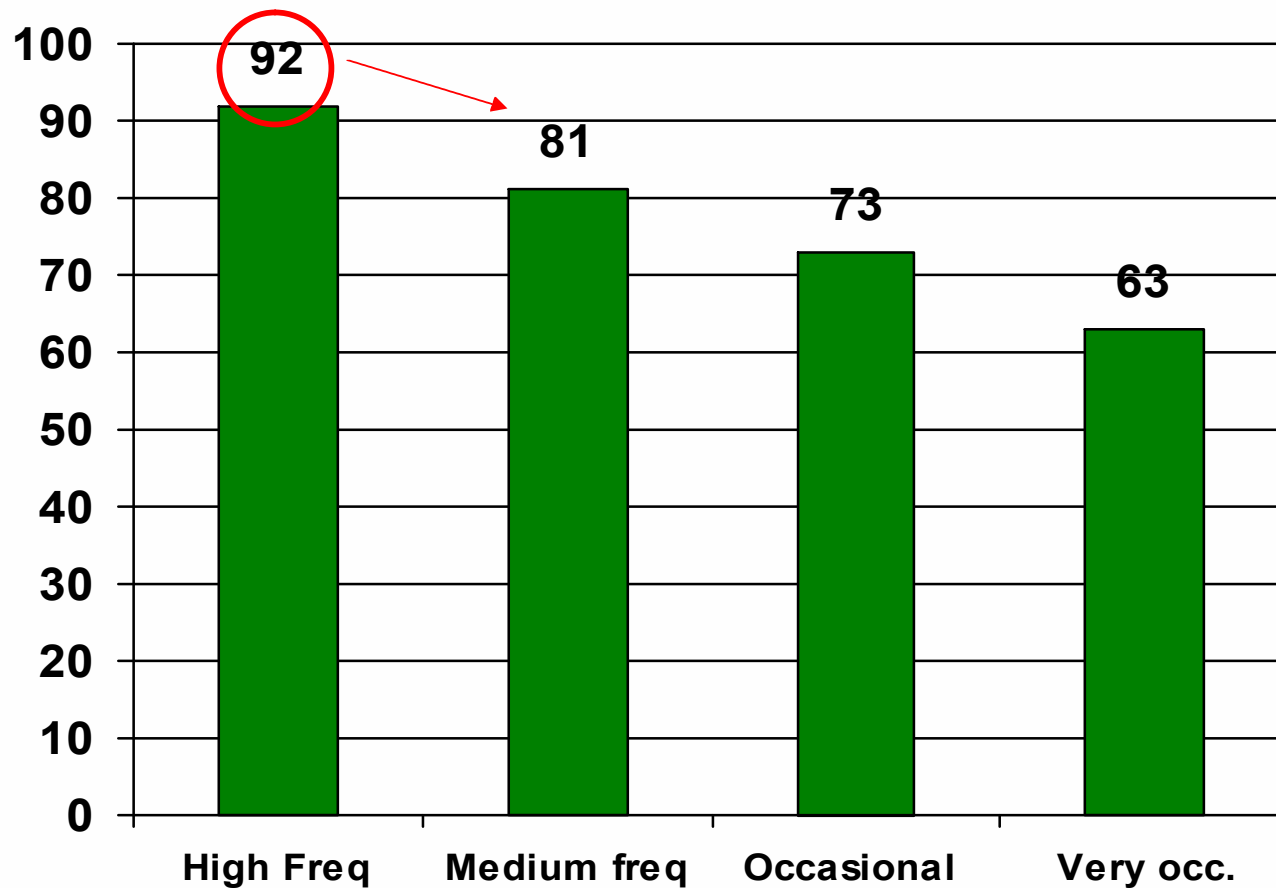
Attitude to Avocados by demographics - “Are Gourmet Food”: All respondents



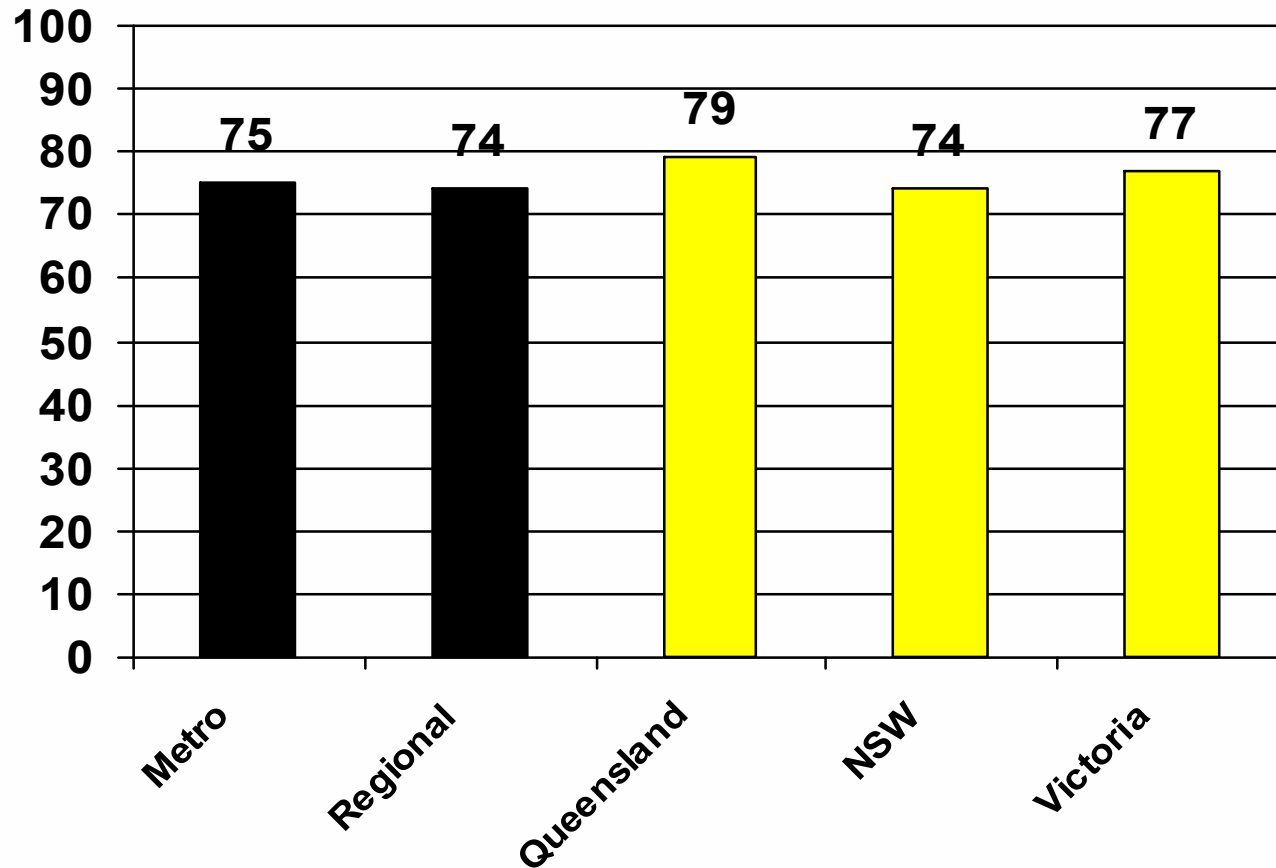
Attitude to Avocados by demographics - “Healthy, good for you”: All respondents



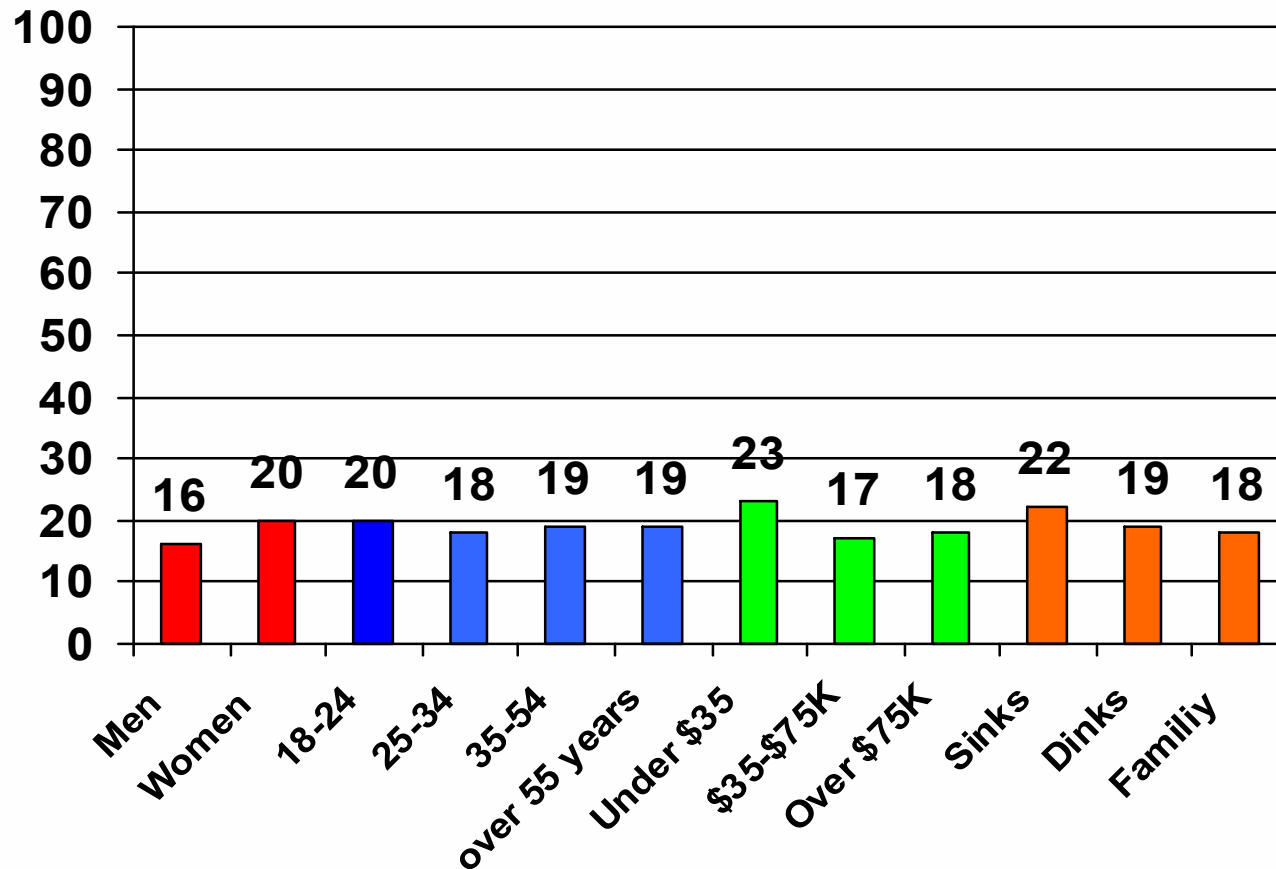
Attitude to Avocados by demographics - “Healthy, good for you”: All respondents



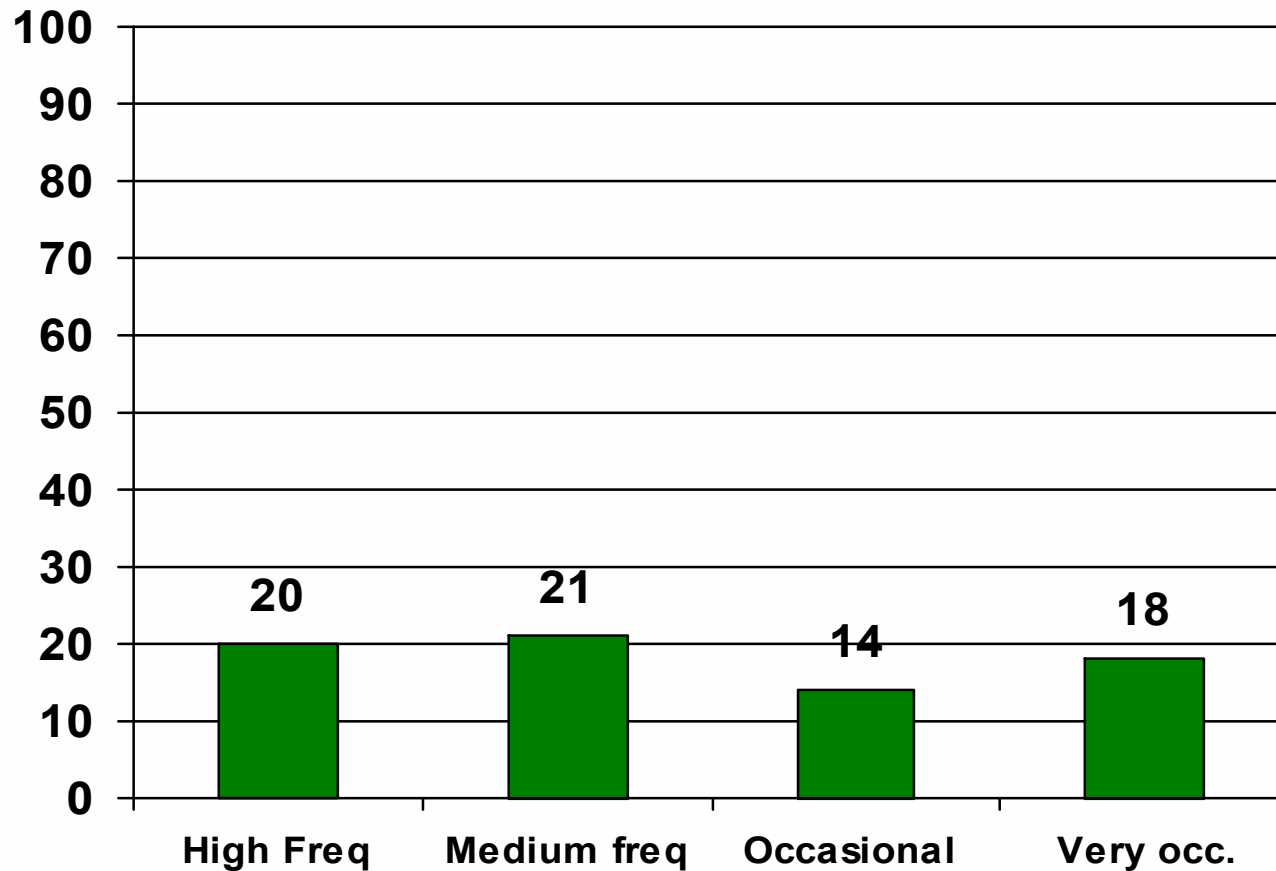
Attitude to Avocados by demographics - “Healthy, good for you”: All respondents



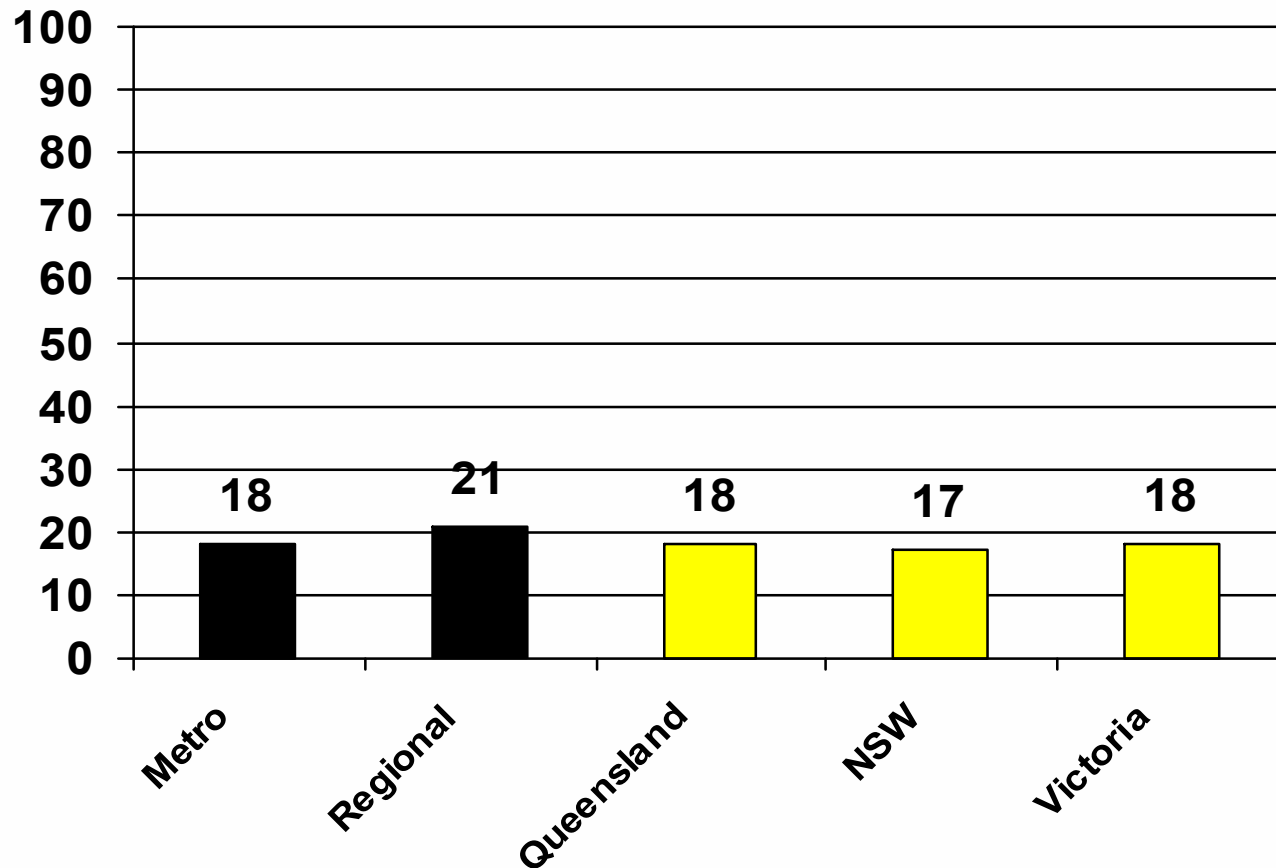
Attitude to Avocados by demographics - “Fashionable”: All respondents



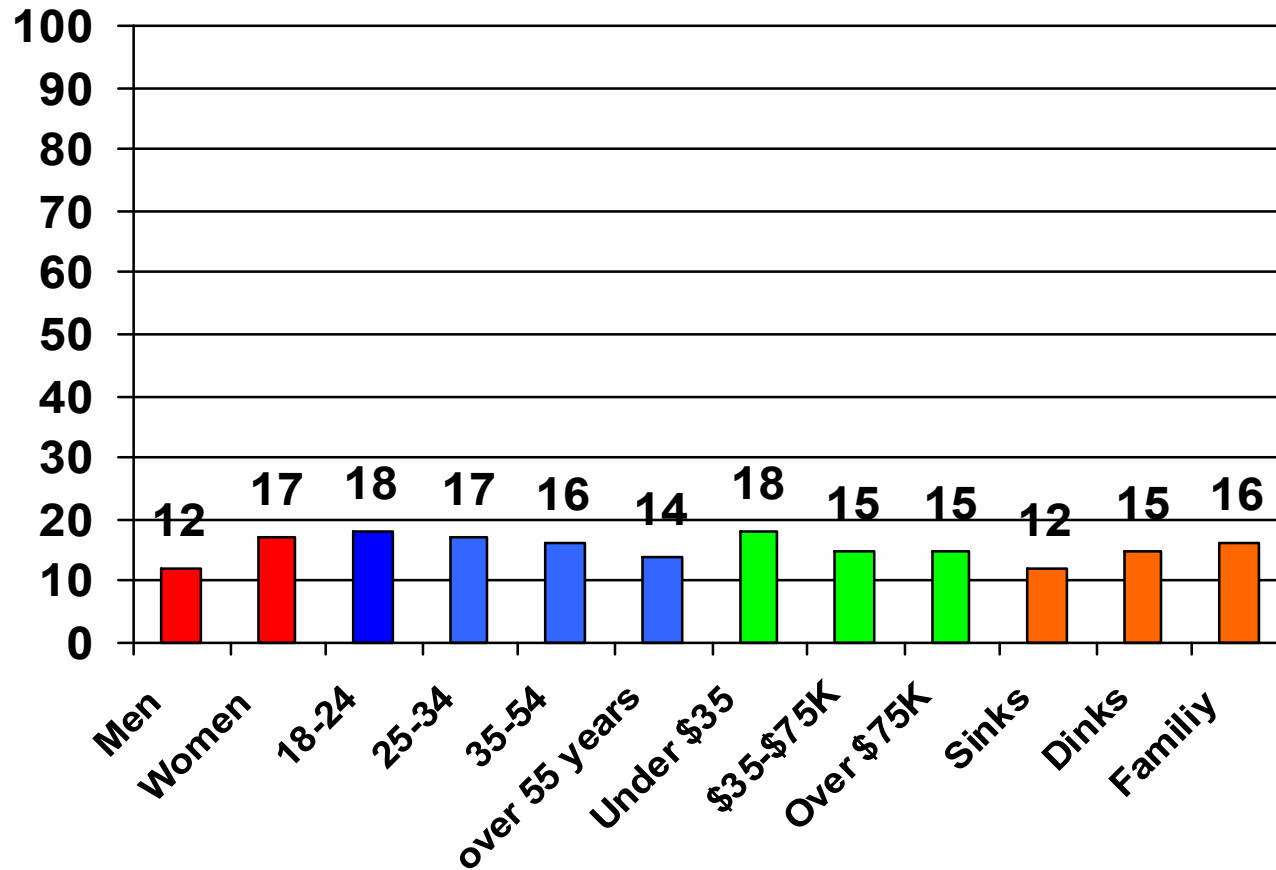
Attitude to Avocados by demographics - “Fashionable”: All respondents



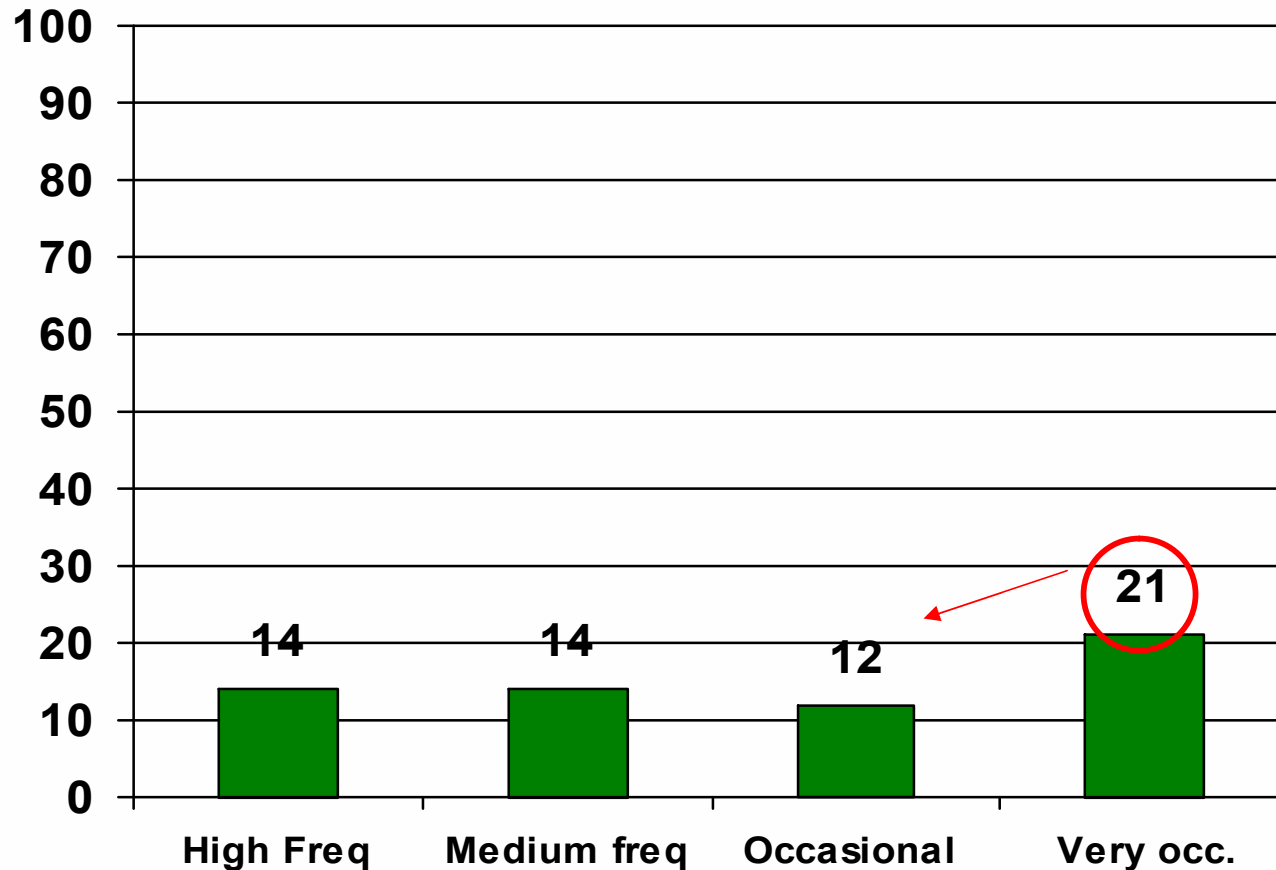
Attitude to Avocados by demographics - “Fashionable”: All respondents



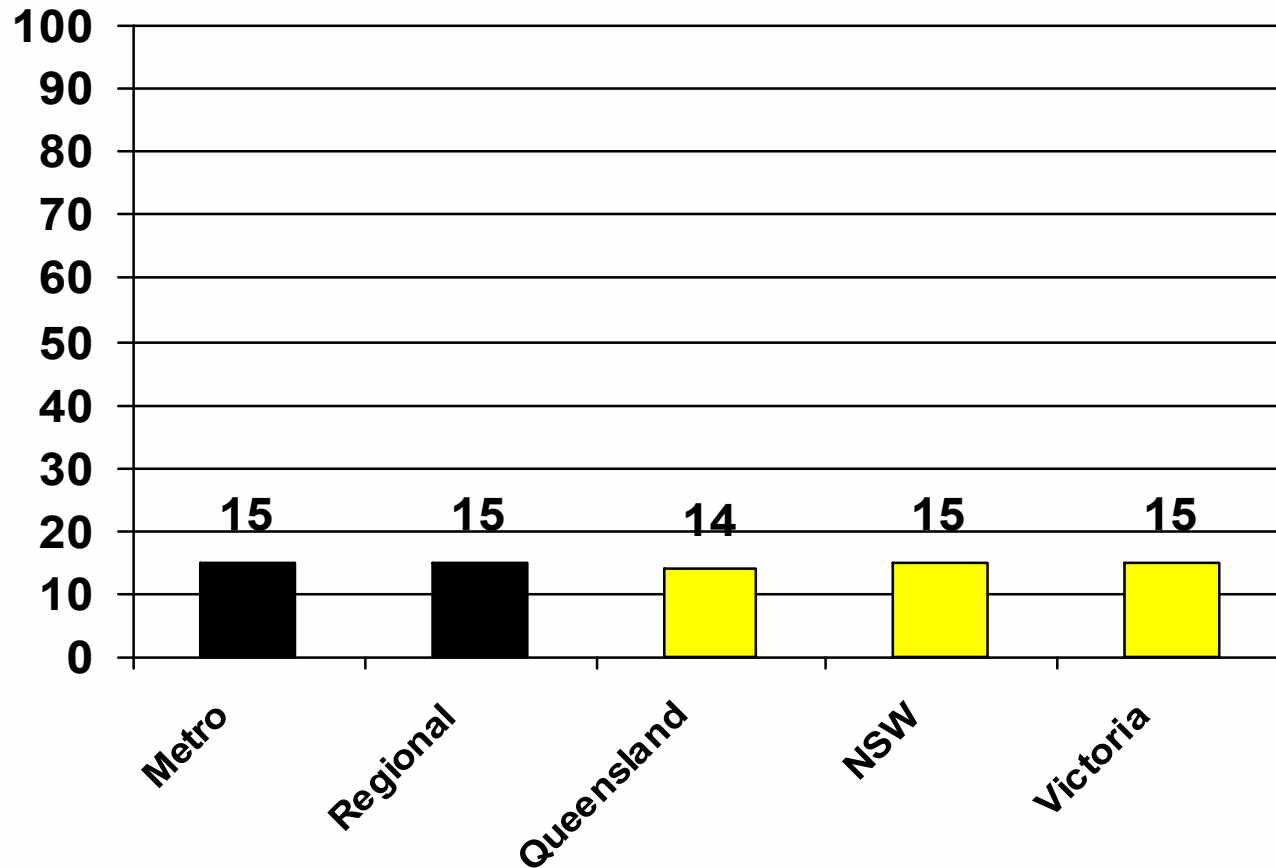
Attitude to Avocados by demographics - “Fattening”: All respondents



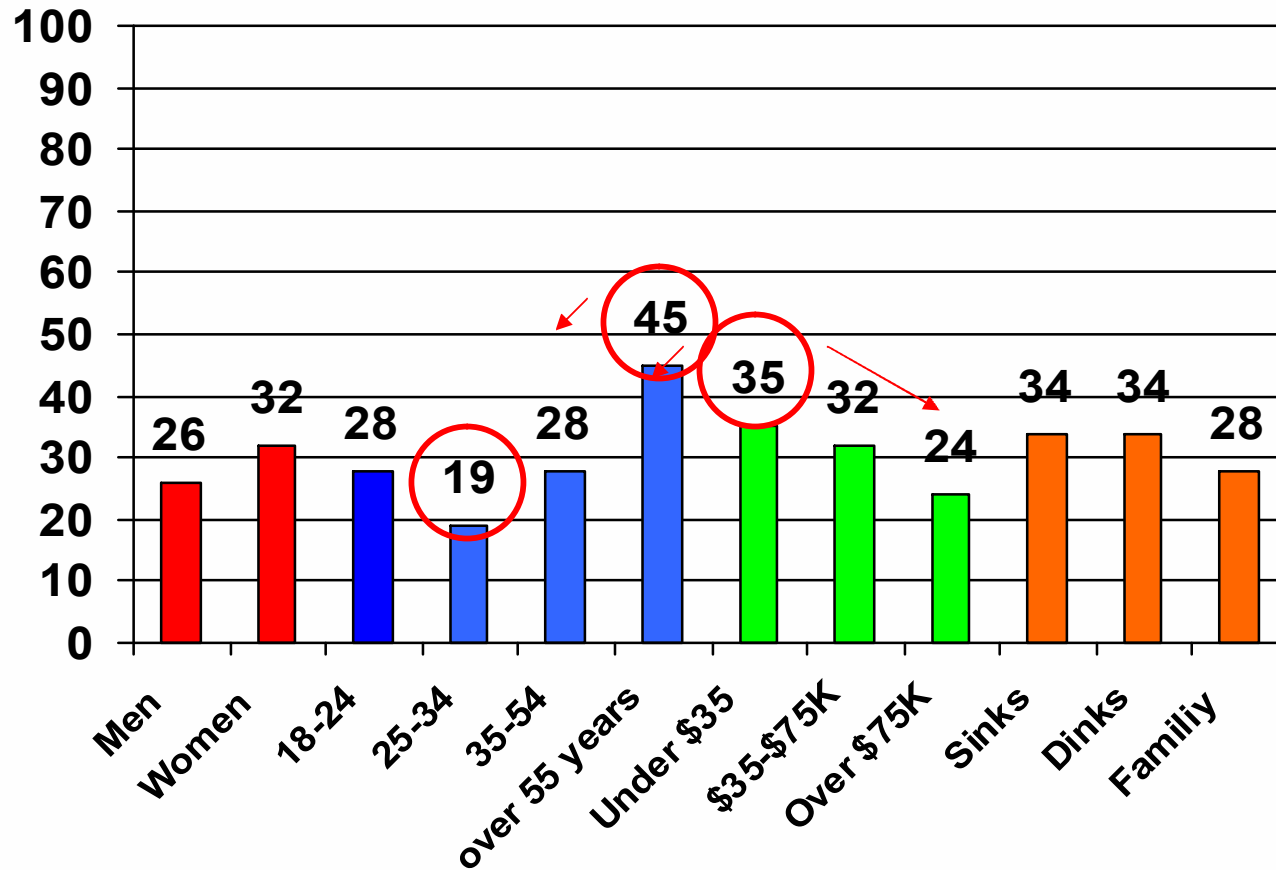
Attitude to Avocados by demographics - “Fattening”: All respondents



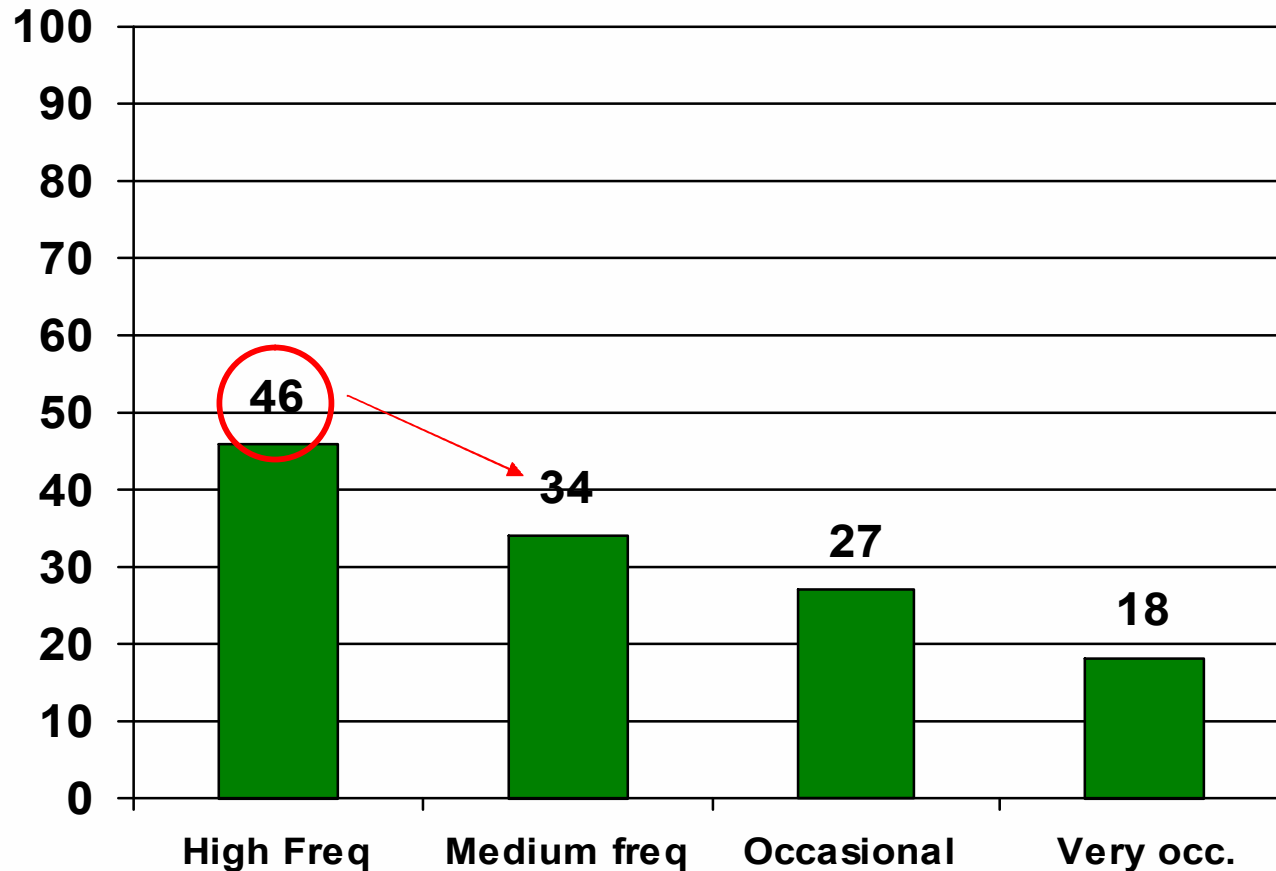
Attitude to Avocados by demographics - “Fattening”: All respondents



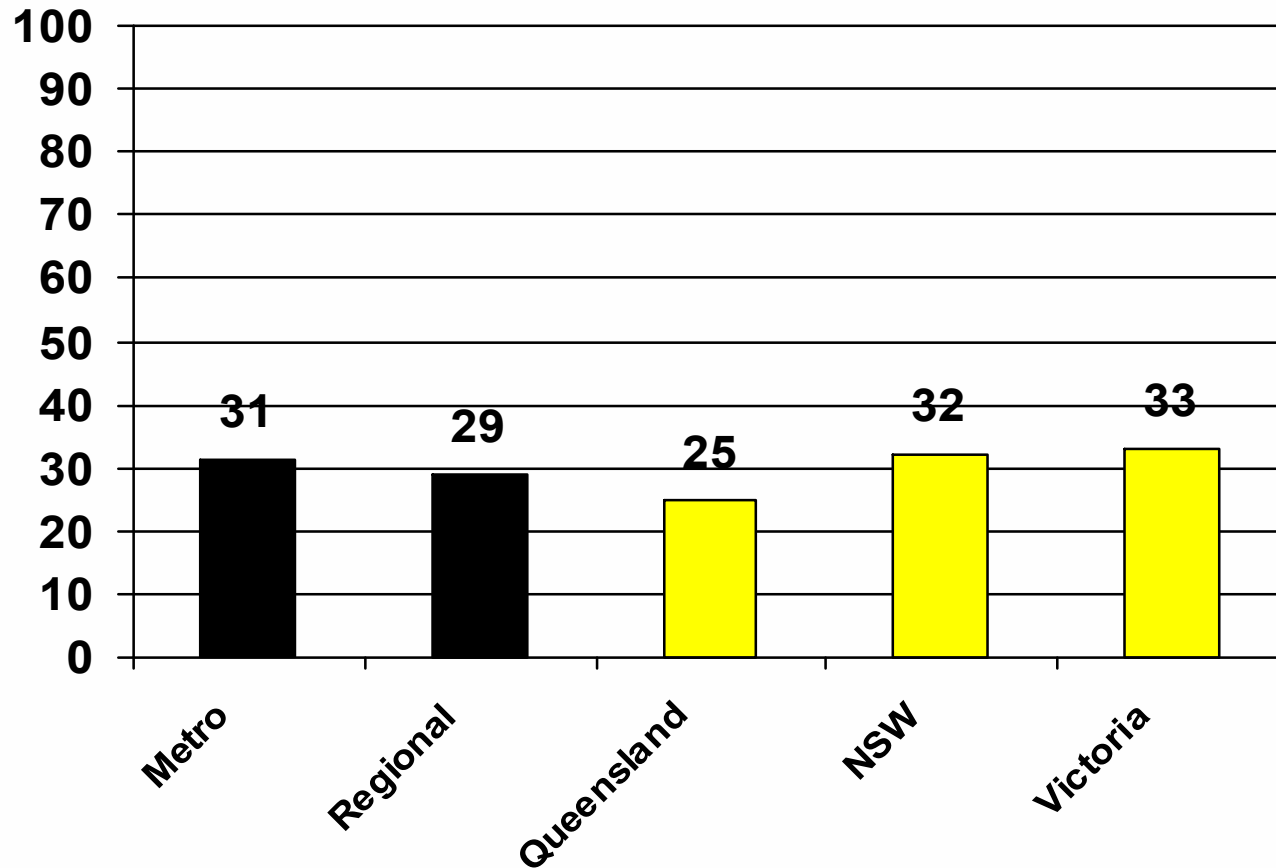
Attitude to Avocados by demographics - “Special and interesting”: All respondents



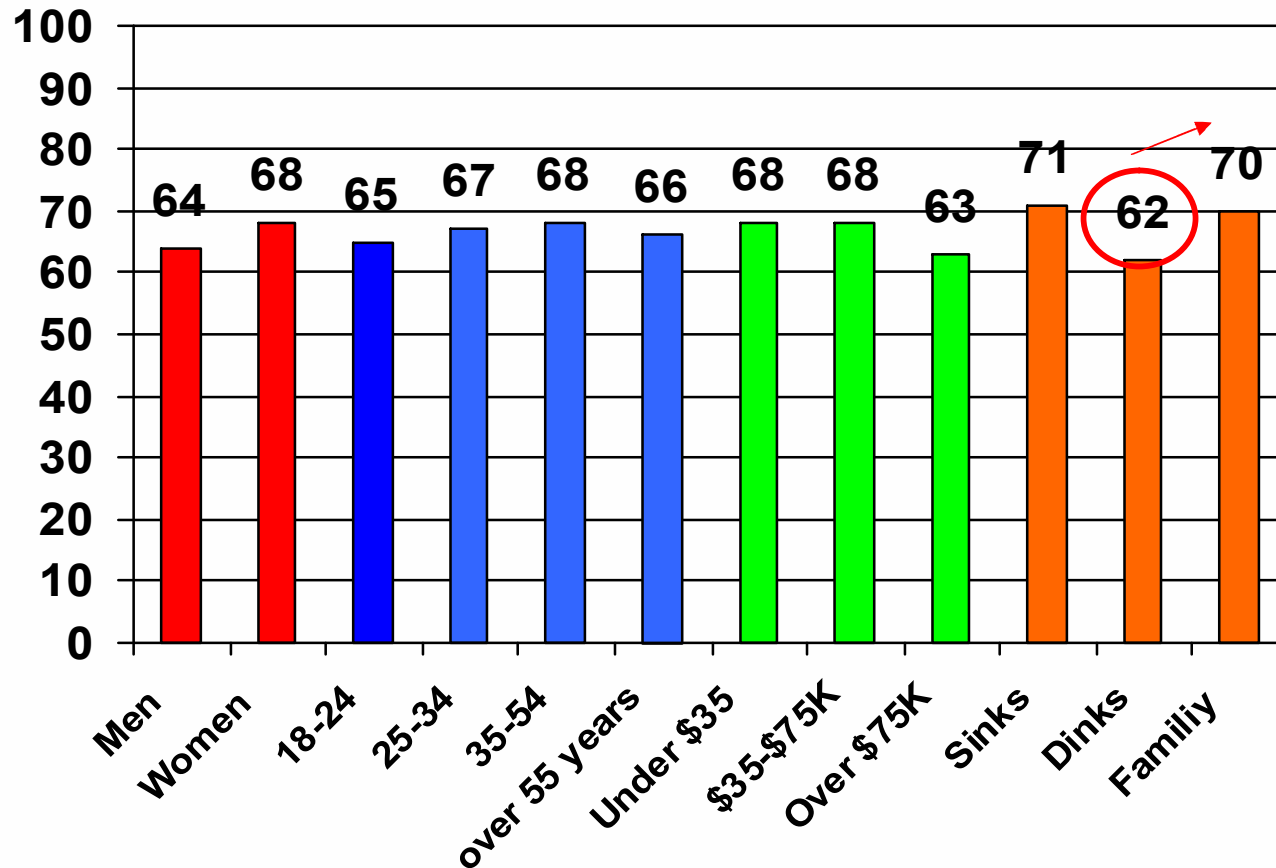
Attitude to Avocados by demographics - “Special and interesting”: All respondents



Attitude to Avocados by demographics - “Special and interesting”: All respondents



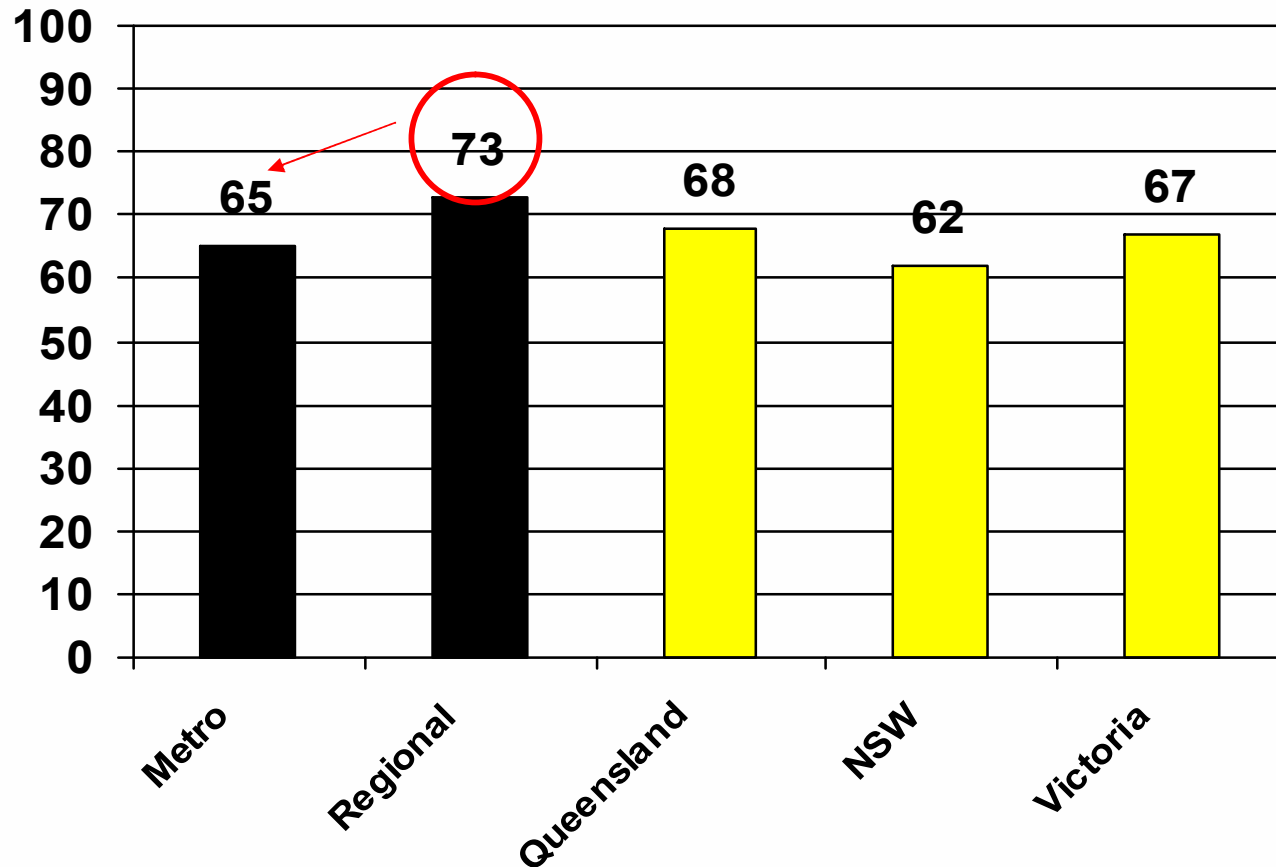
Attitude to Avocados by demographics - “Not liked by everyone”: All respondents



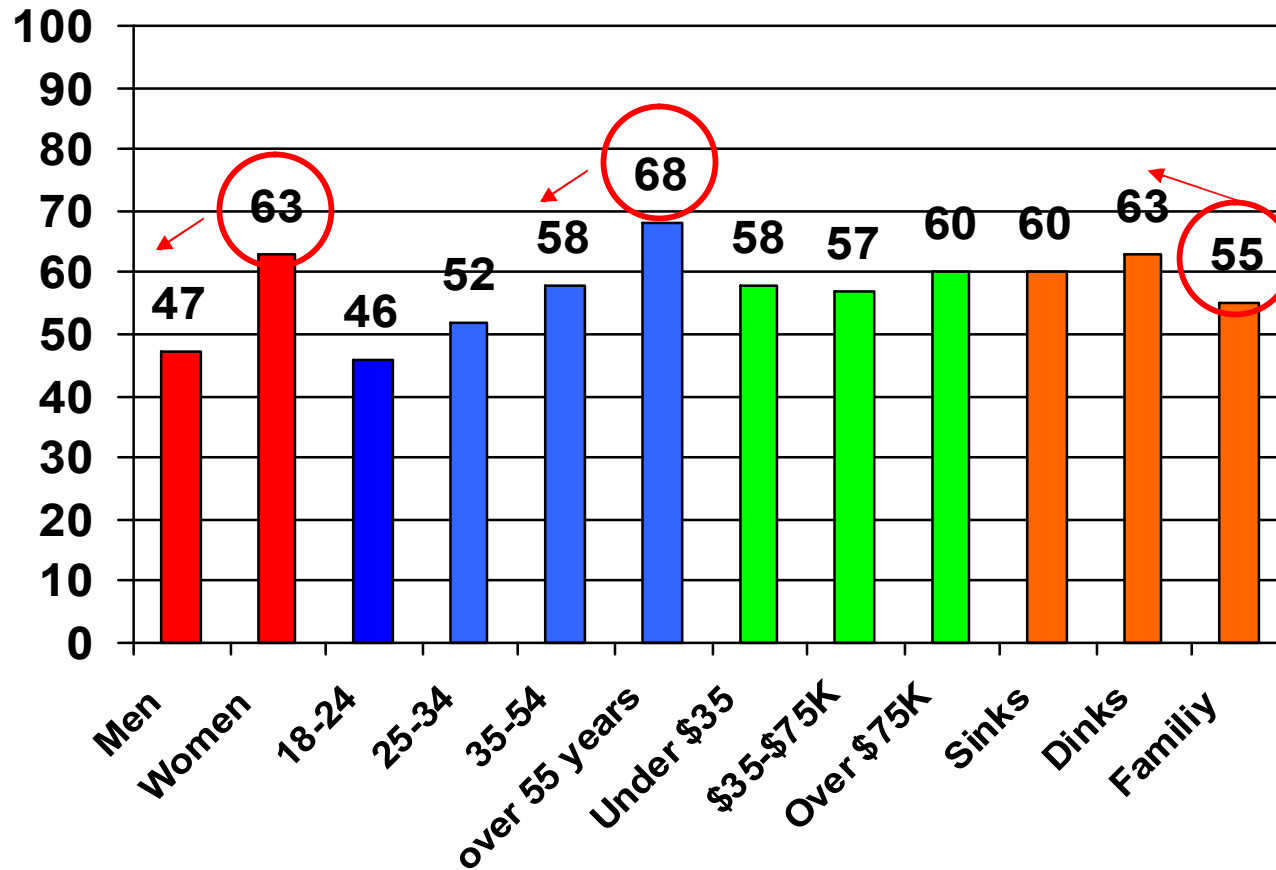
Attitude to Avocados by demographics - “Not liked by everyone”: All respondents



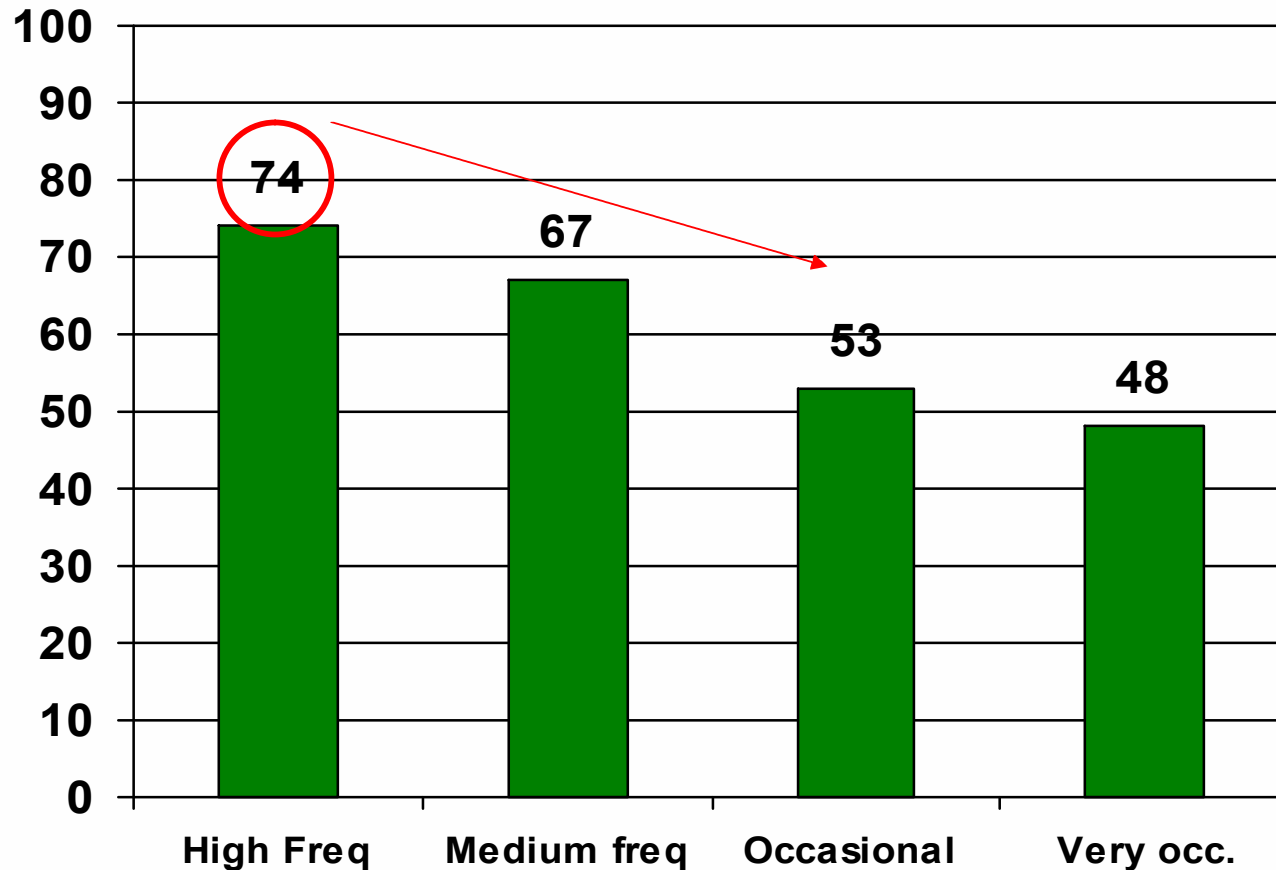
Attitude to Avocados by demographics - “Not liked by everyone”: All respondents



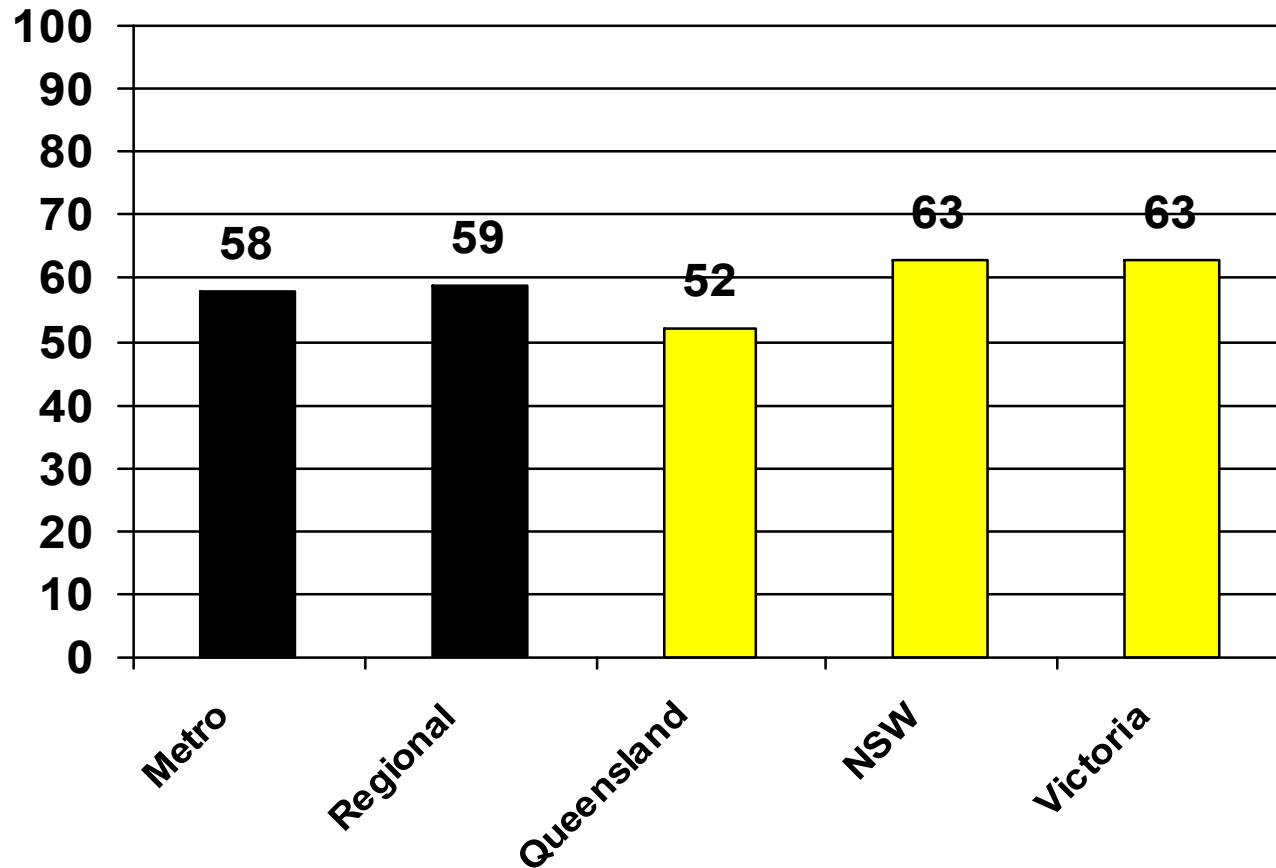
Attitude to Avocados by demographics - “Ideal for entertaining”: All respondents



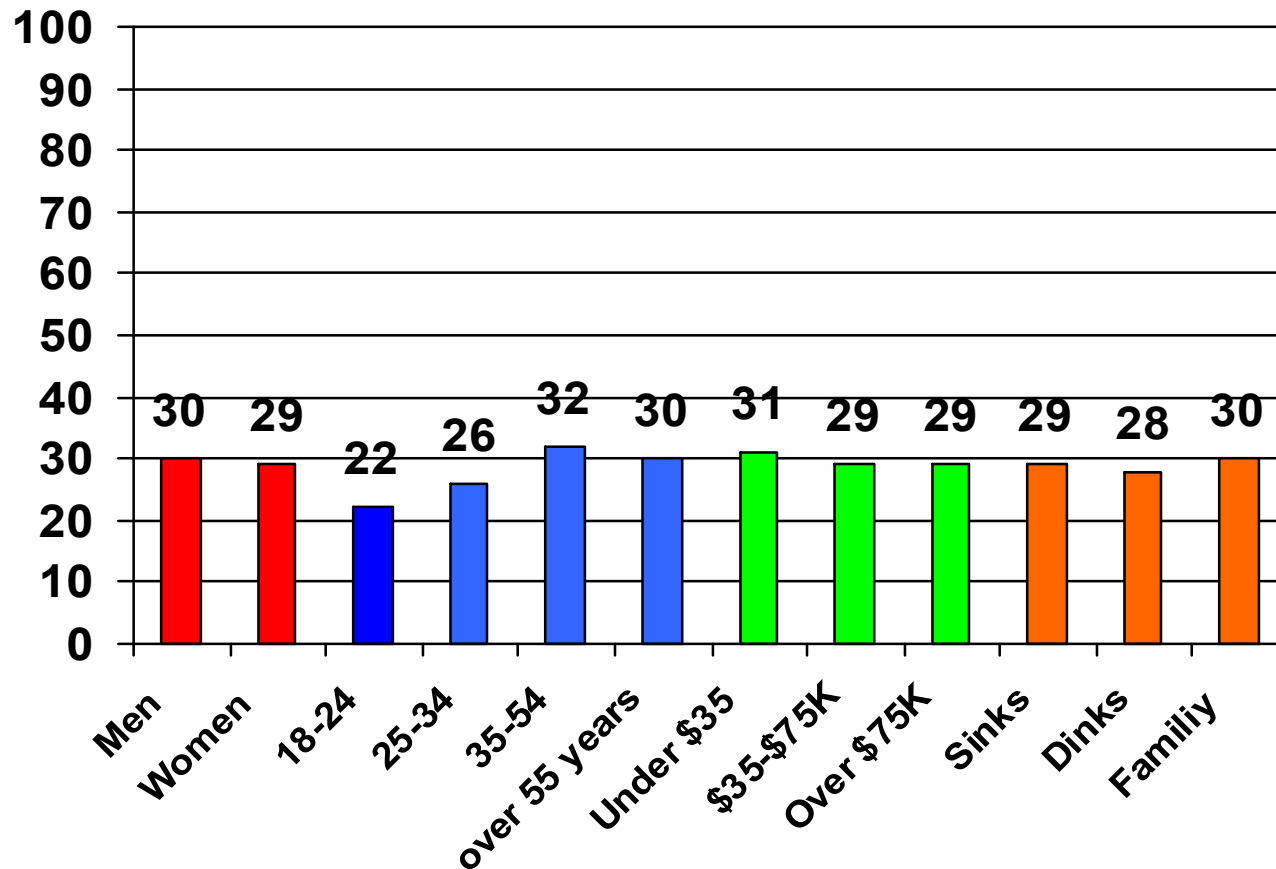
Attitude to Avocados by demographics - “Ideal for entertaining”: All respondents



Attitude to Avocados by demographics - “Ideal for entertaining”: All respondents



Attitude to Avocados by demographics - “A bit exotic”: All respondents

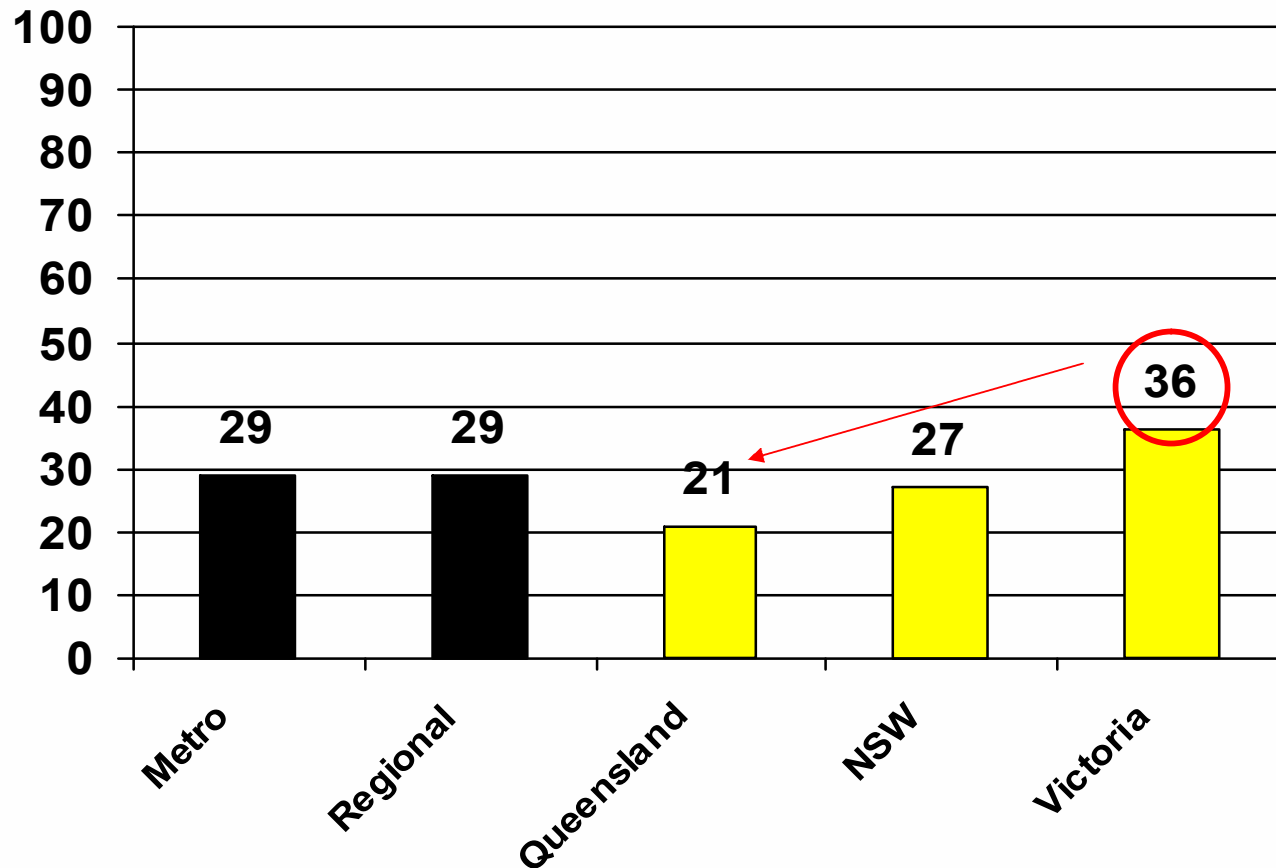


Attitude to Avocados by demographics -

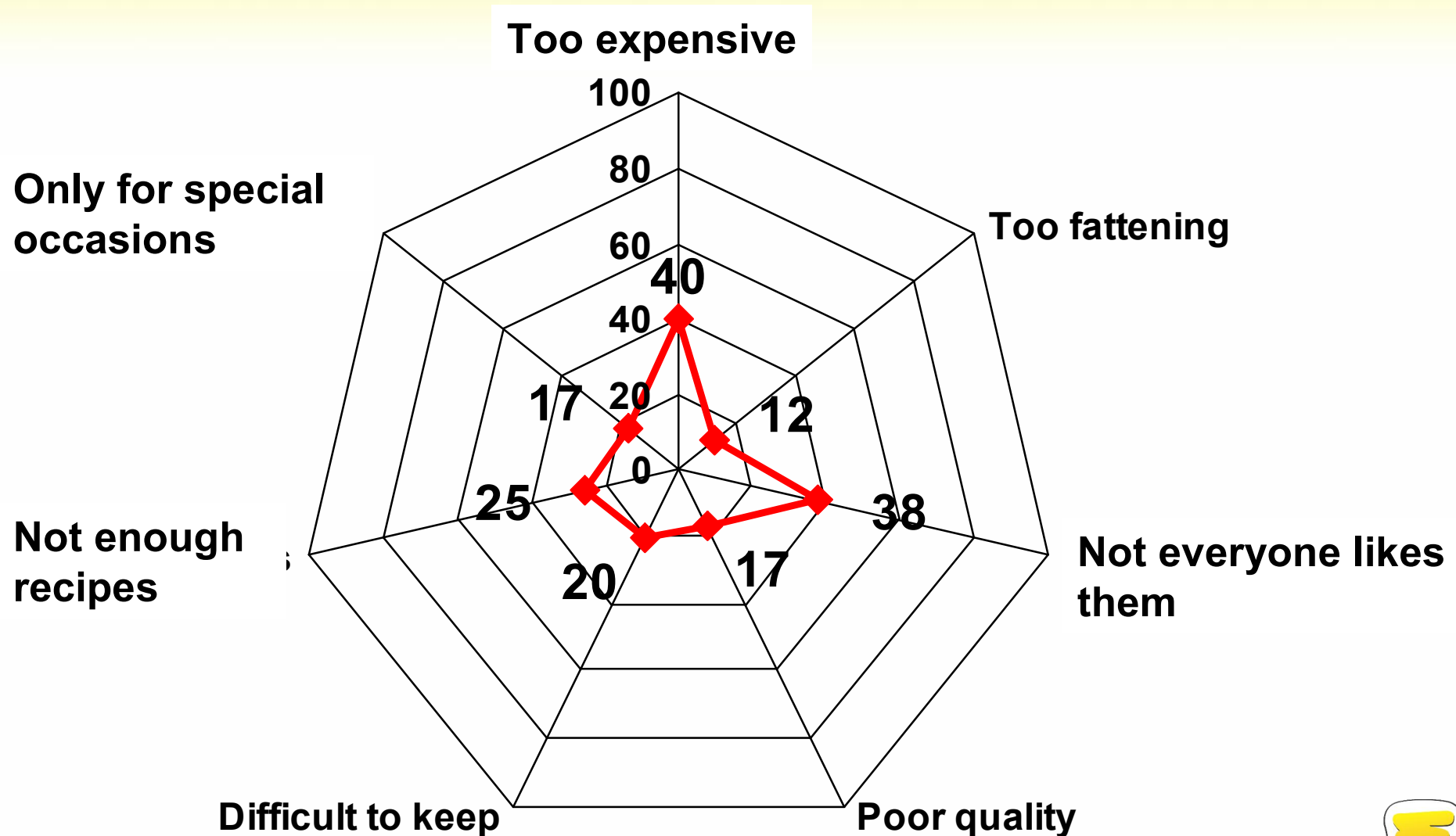
“A bit exotic”: All respondents



Attitude to Avocados by demographics - “A bit exotic”: All respondents

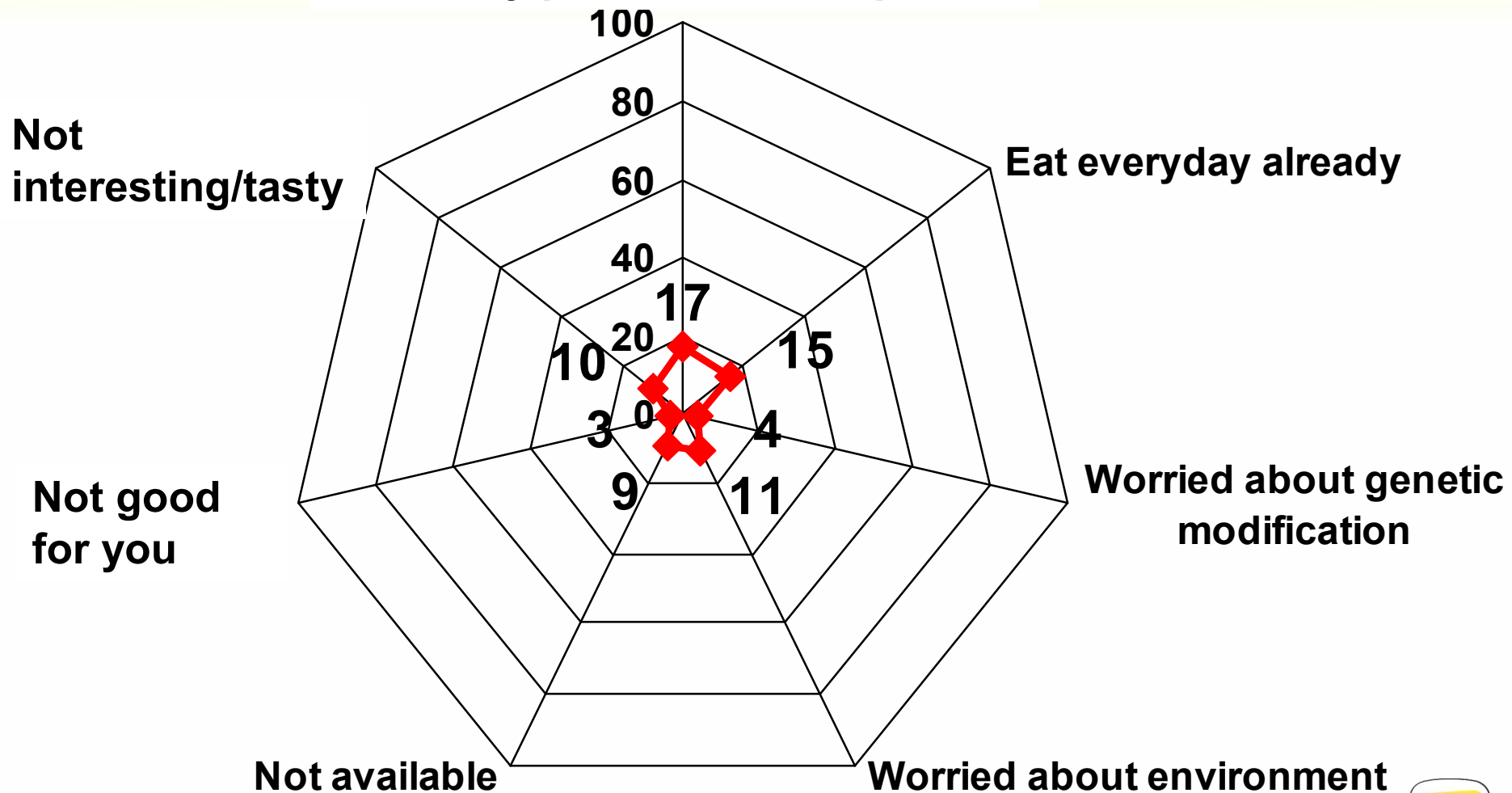


Reasons for not buying more often: All respondents

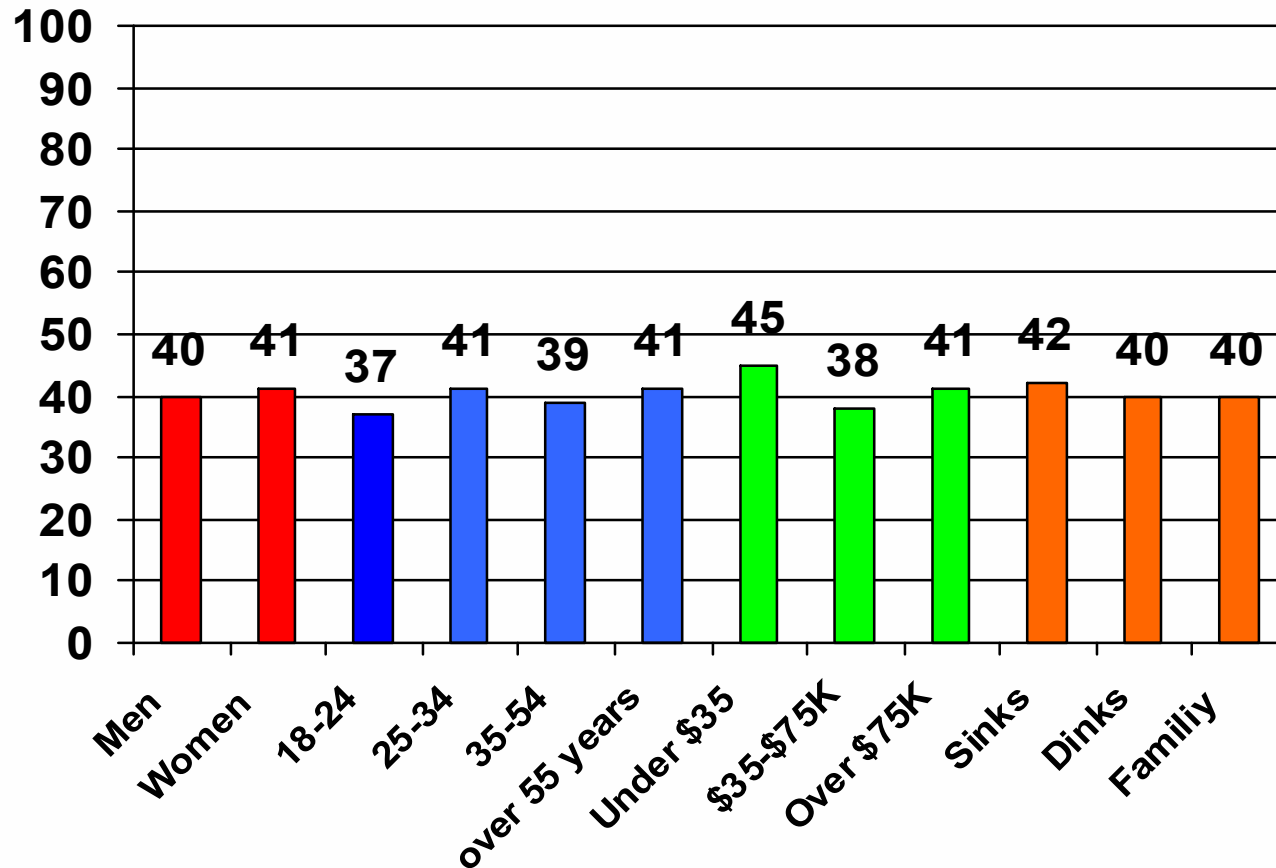


Reasons for not buying more often: All respondents

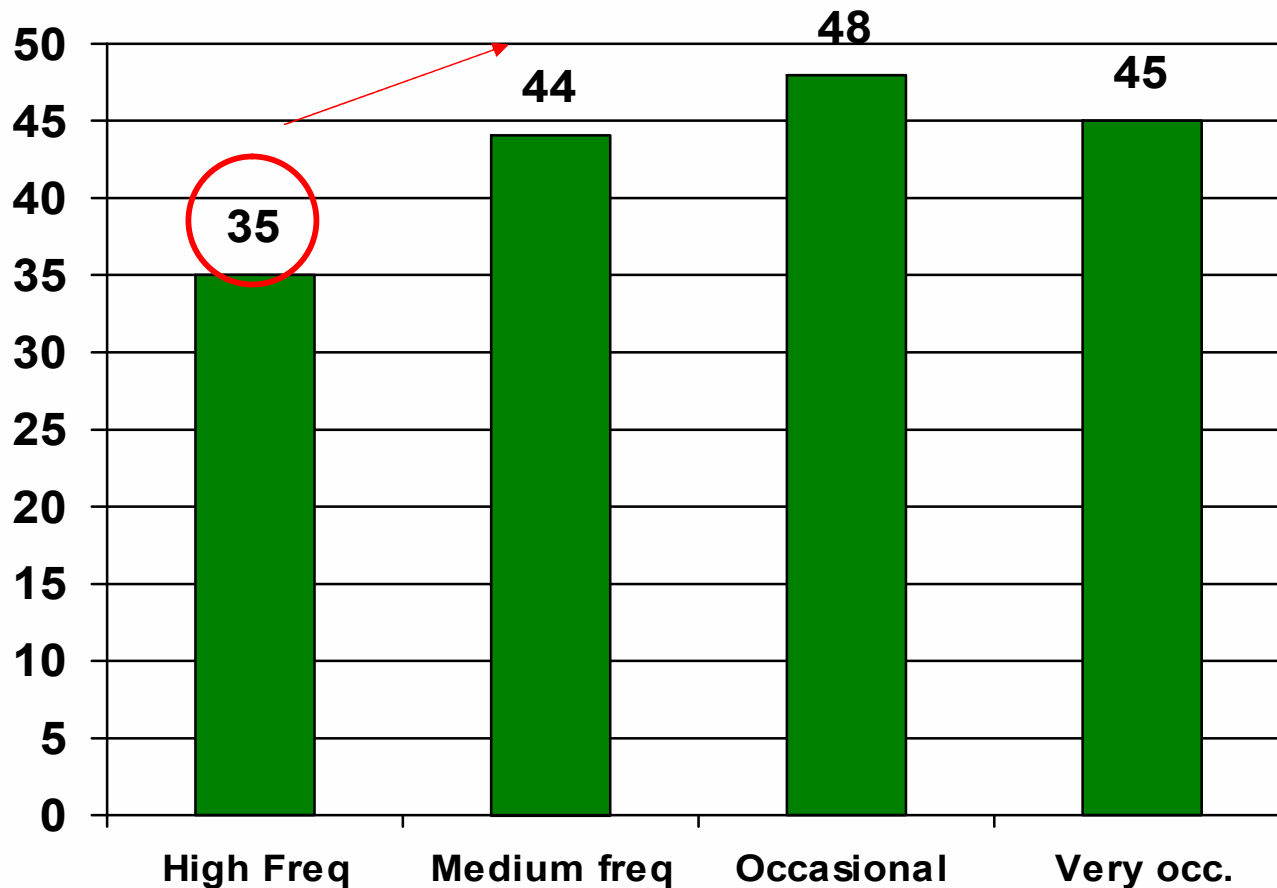
Too many problems with ripeness



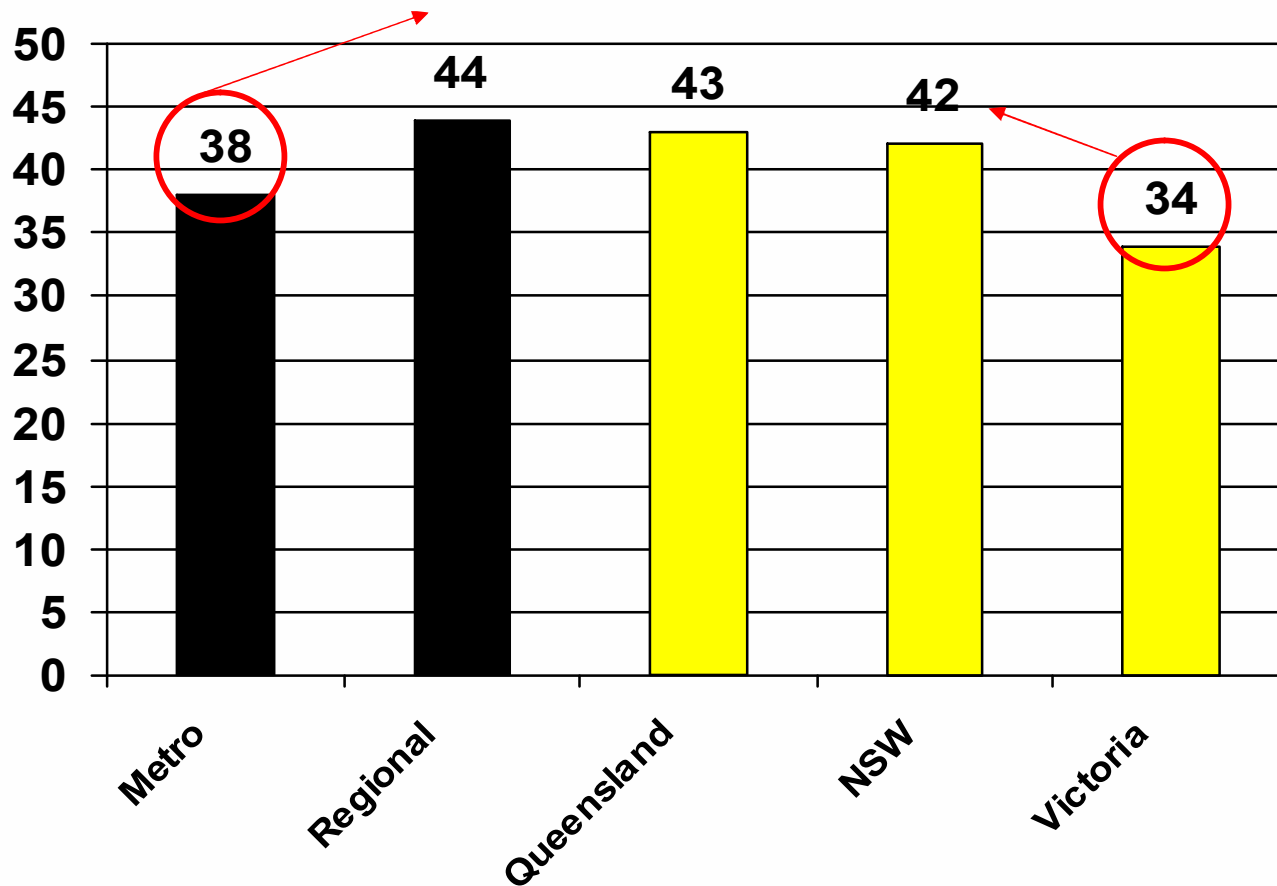
Reasons for not buying more often by demographics - “Too expensive”: All respondents



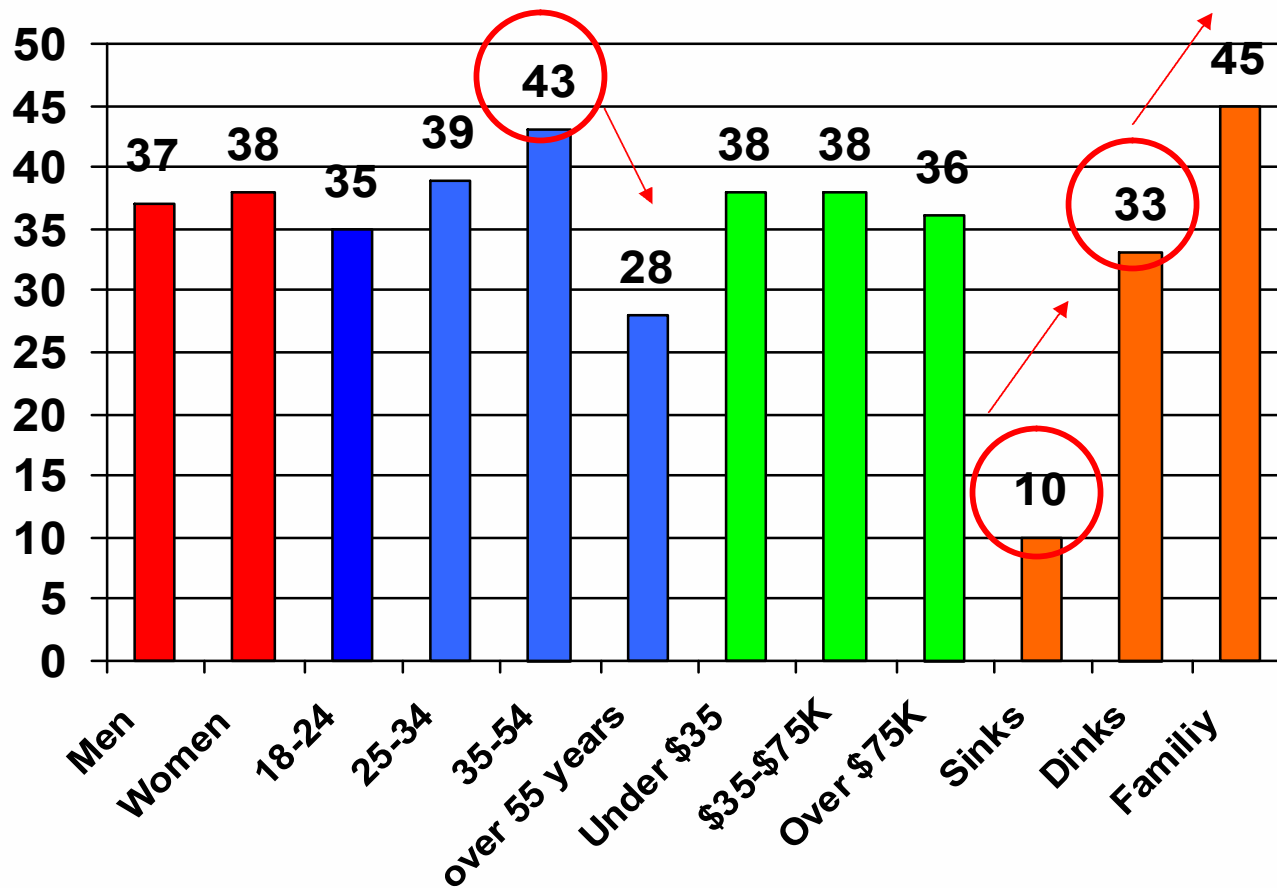
Reasons for not buying more often by frequency - “Too expensive”: All respondents



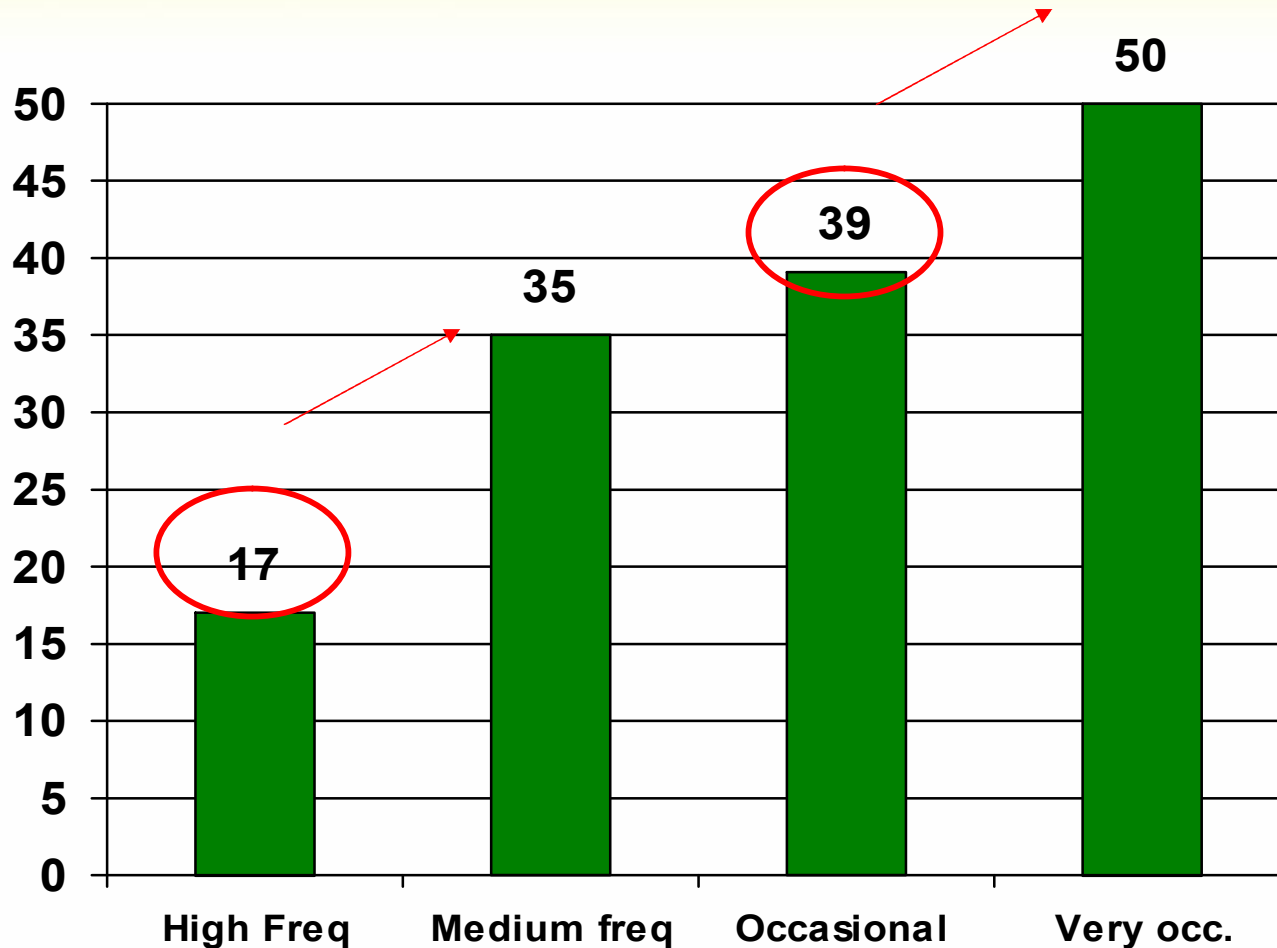
Reasons for not buying more often by state - “Too expensive”: All respondents



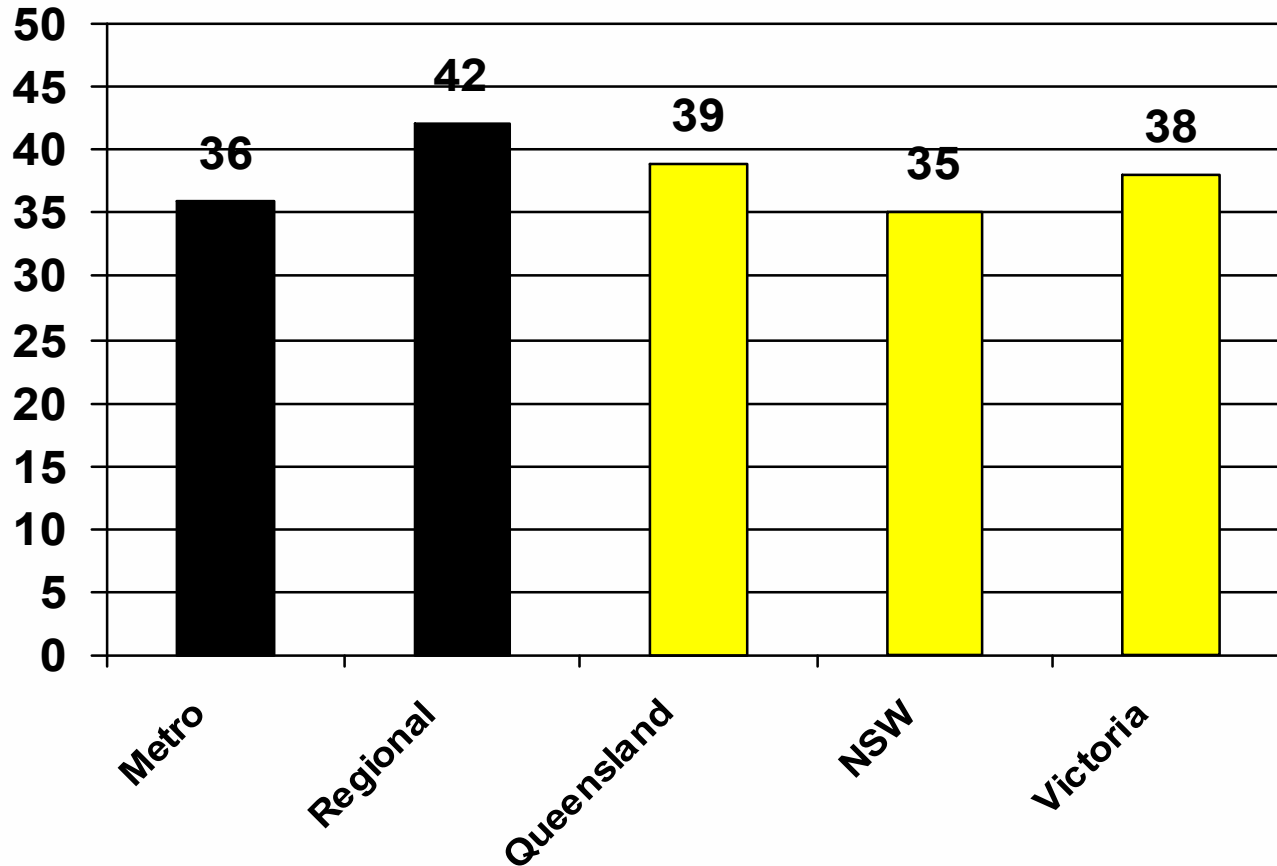
Reasons for not buying more often by demographics - “Not everyone likes them”: All respondents



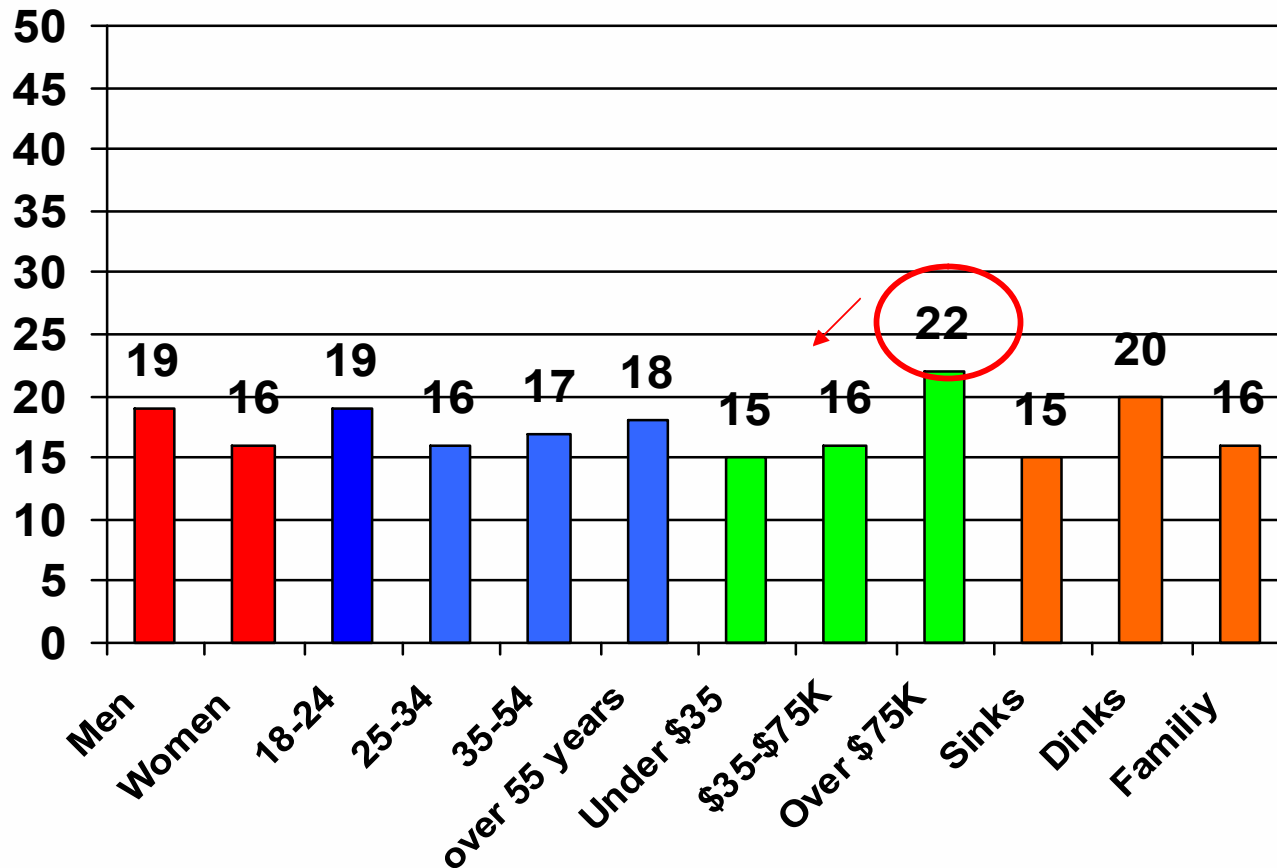
Reasons for not buying more often by frequency - “Not everyone likes them”: All respondents



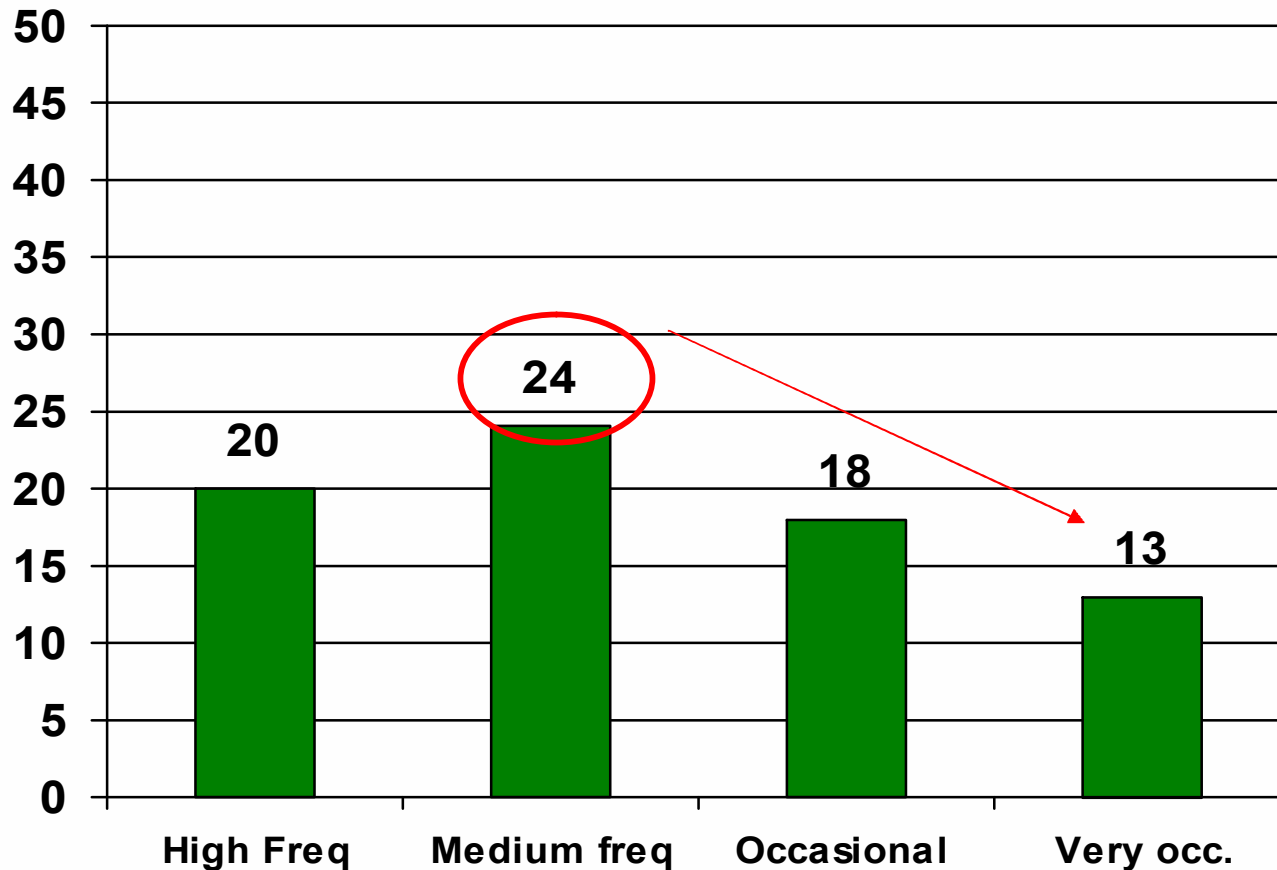
Reasons for not buying more often by state - “Not everyone likes them”: All respondents



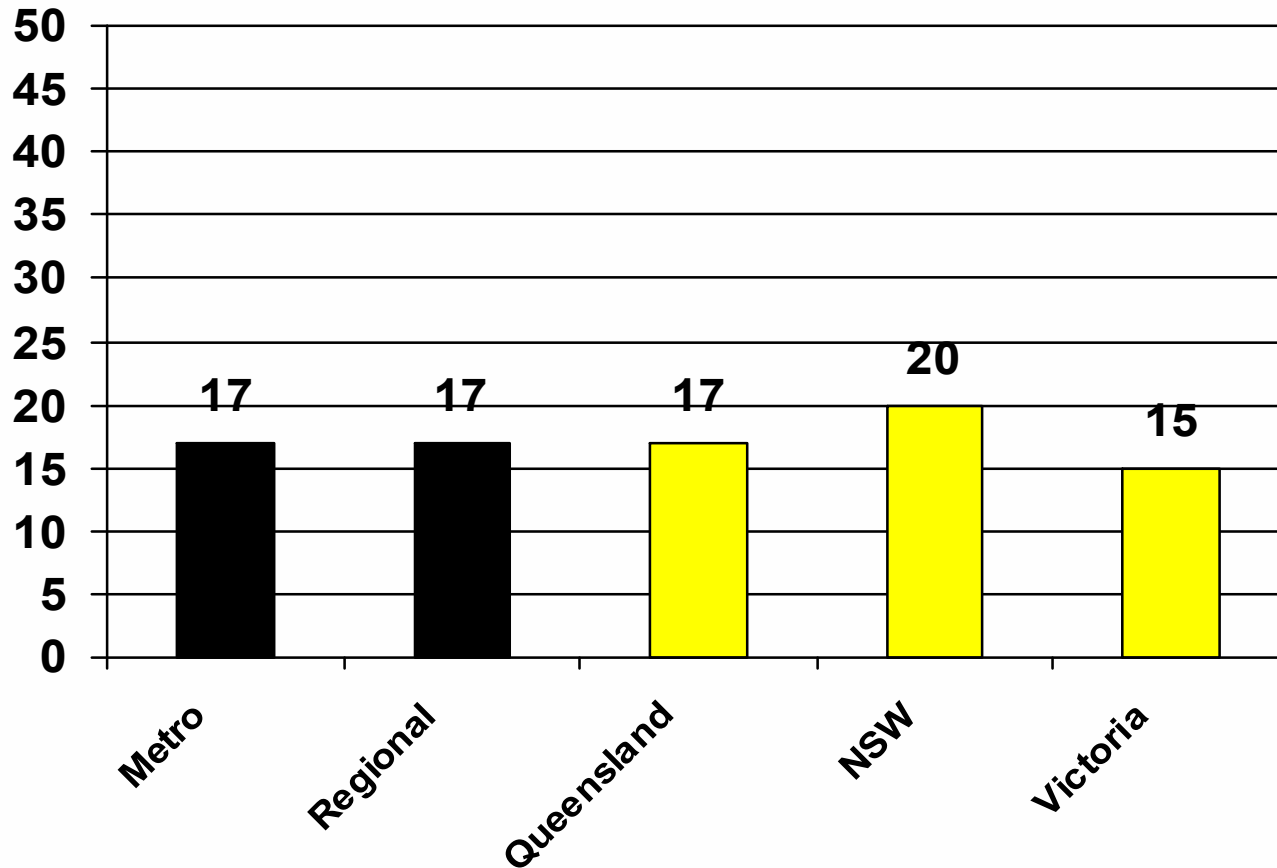
Reasons for not buying more often by demographics - “Poor quality”: All respondents



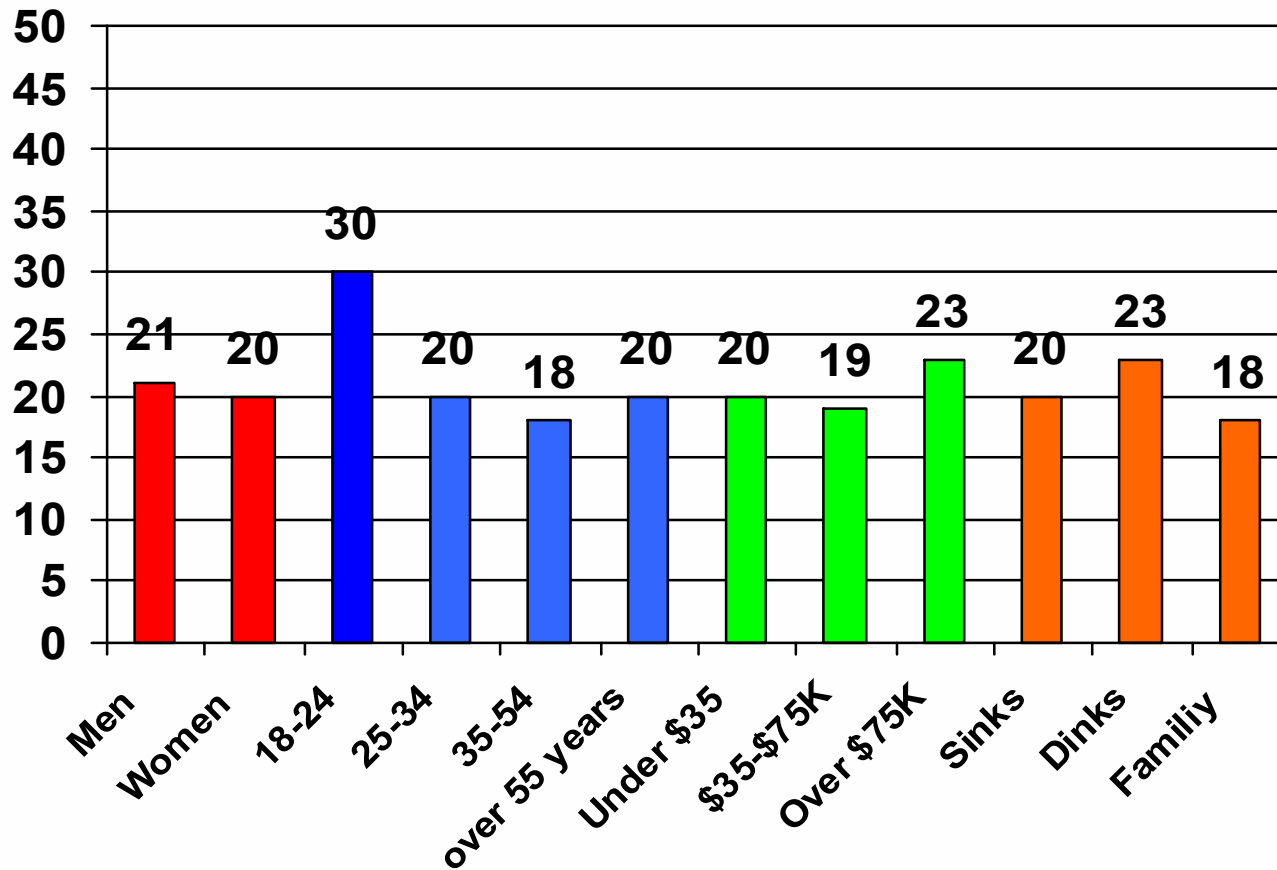
Reasons for not buying more often by frequency - “Poor quality”: All respondents



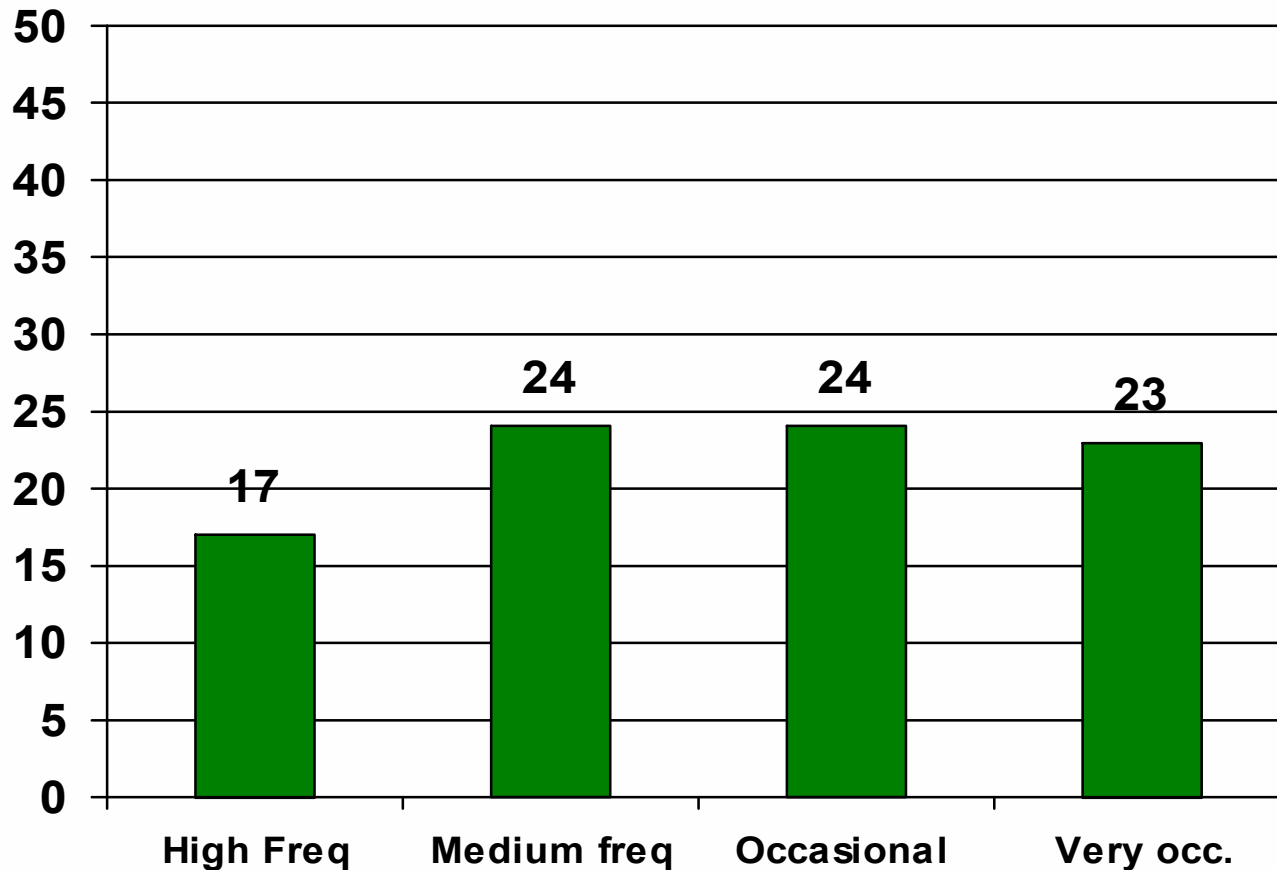
Reasons for not buying more often by state - “Poor quality”: All respondents



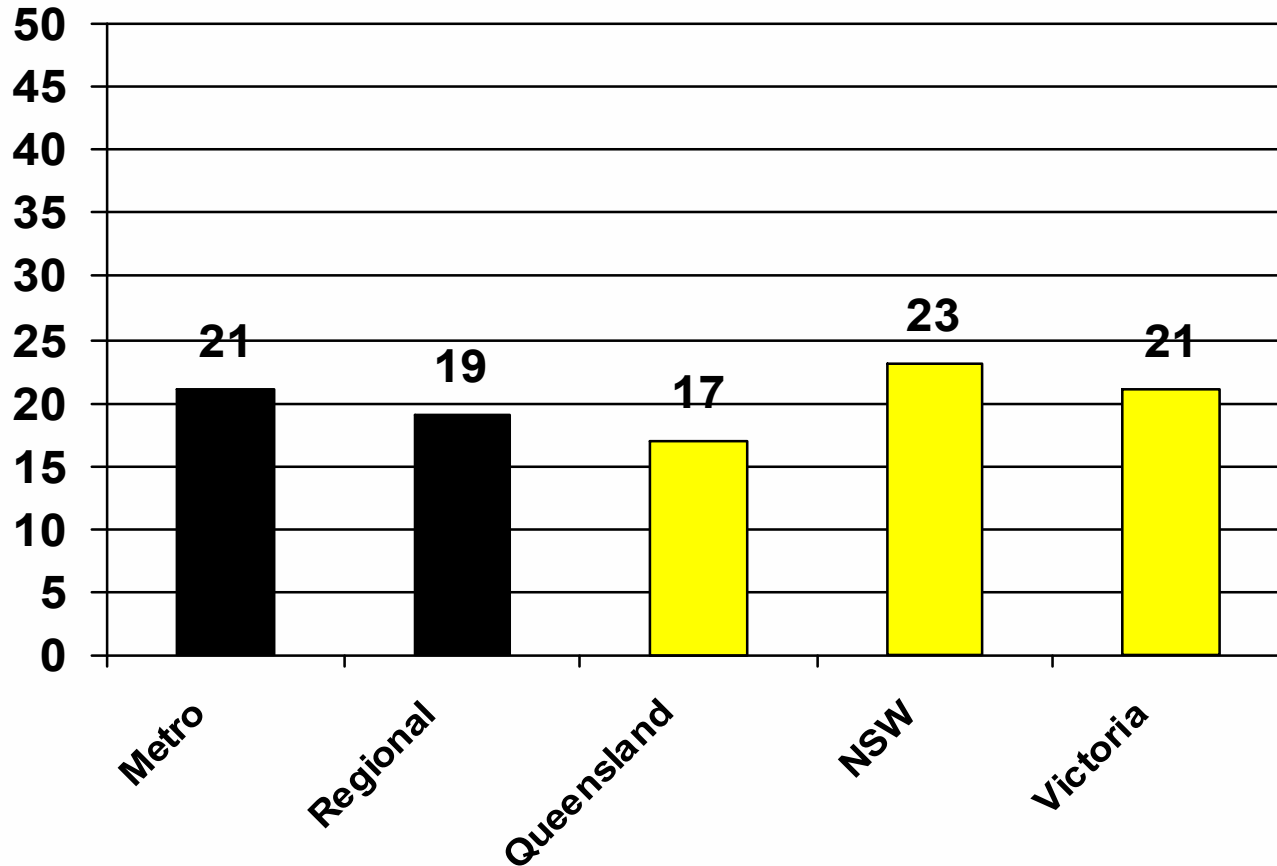
Reasons for not buying more often by demographics - "Difficult to store": All respondents



Reasons for not buying more often by frequency - “Difficult to store”: All respondents

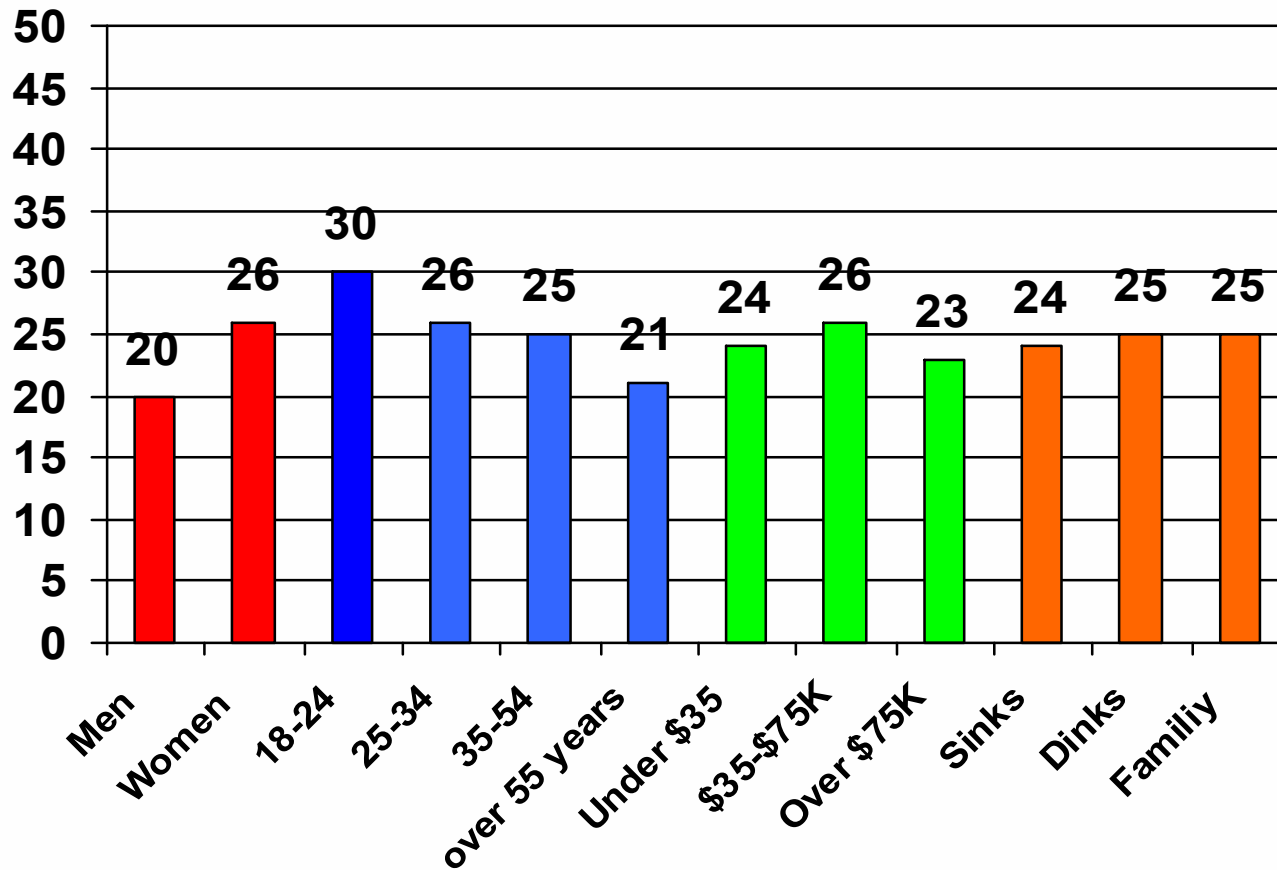


Reasons for not buying more often by state - “Difficult to store”: All respondents



Reasons for not buying more often by demographics - “Not enough recipes/ideas”:

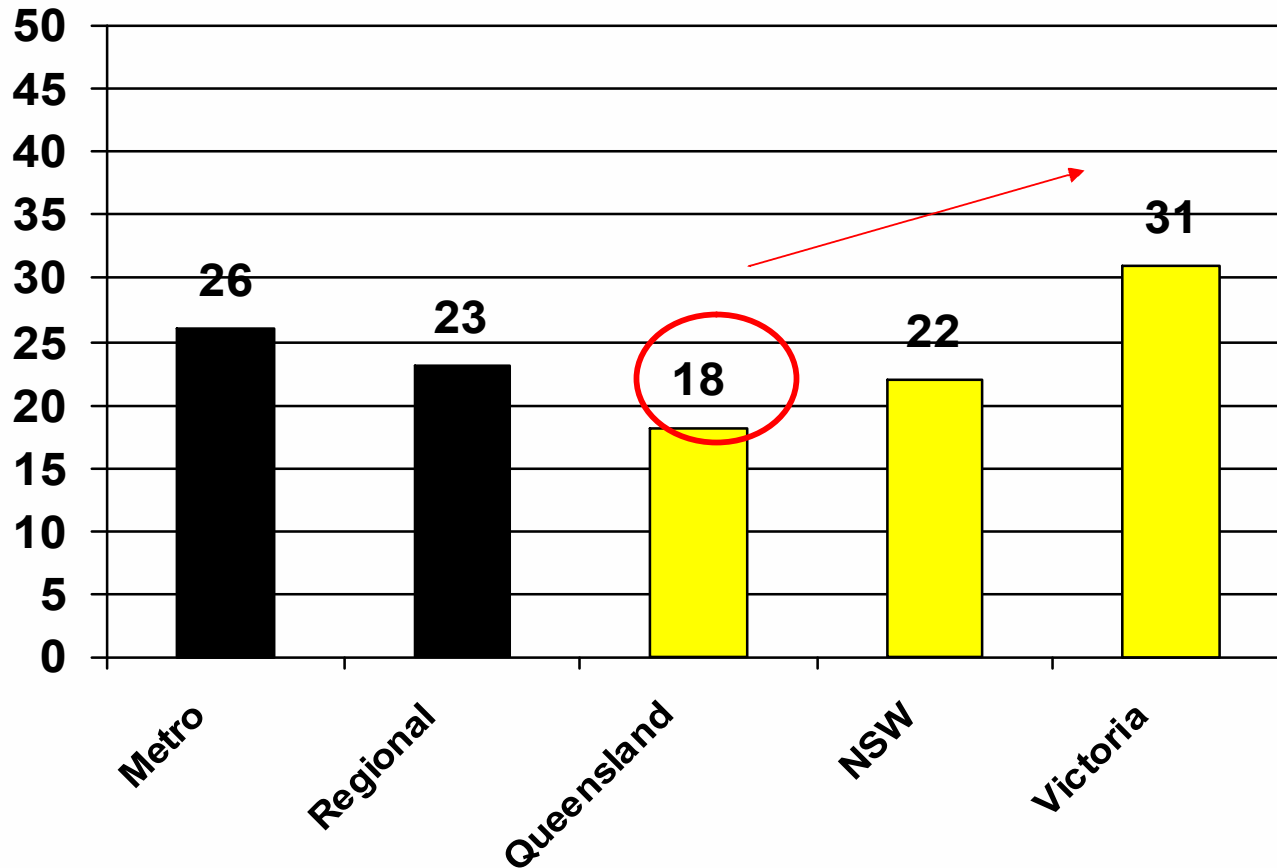
All respondents



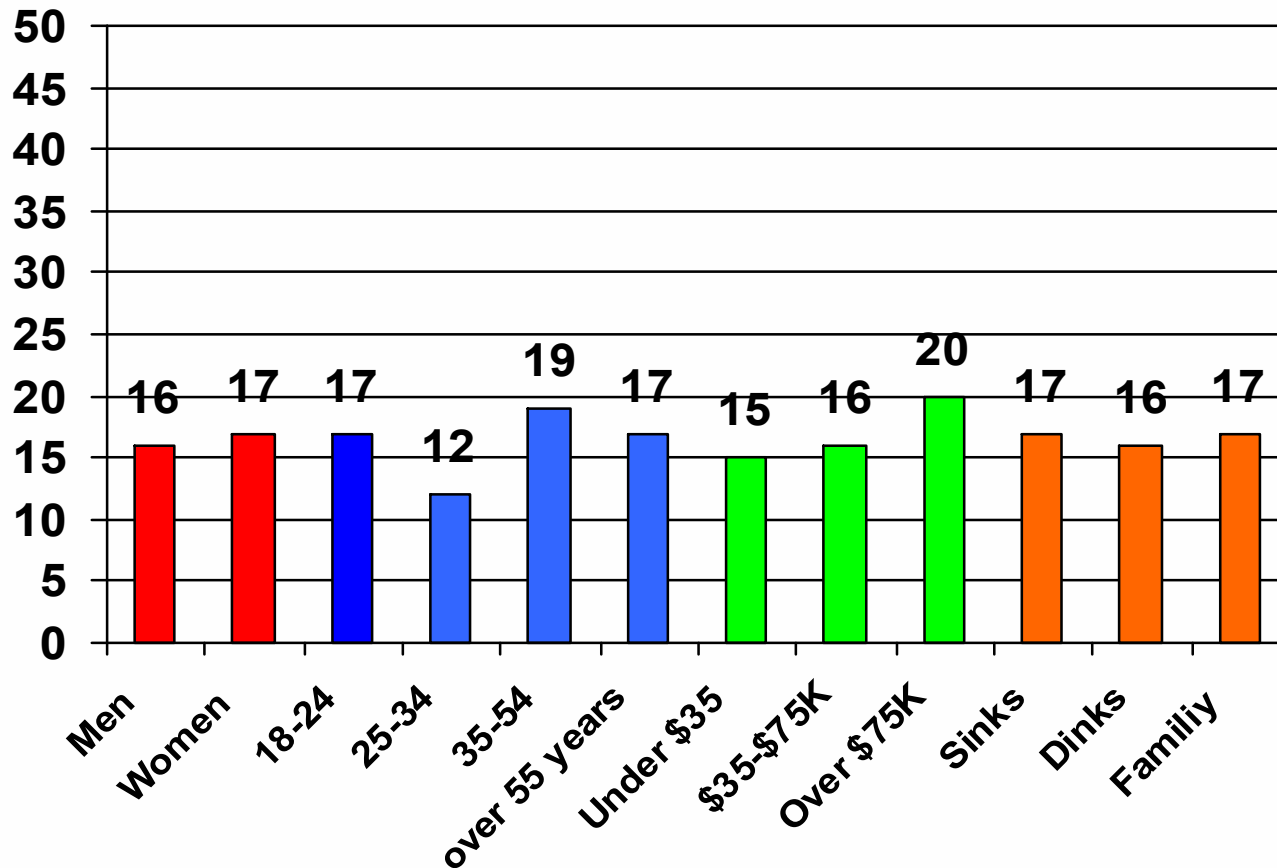
Reasons for not buying more often by frequency - “Not enough recipes/ideas”: All respondents



Reasons for not buying more often by state - “Not enough recipes/ideas”: All respondents

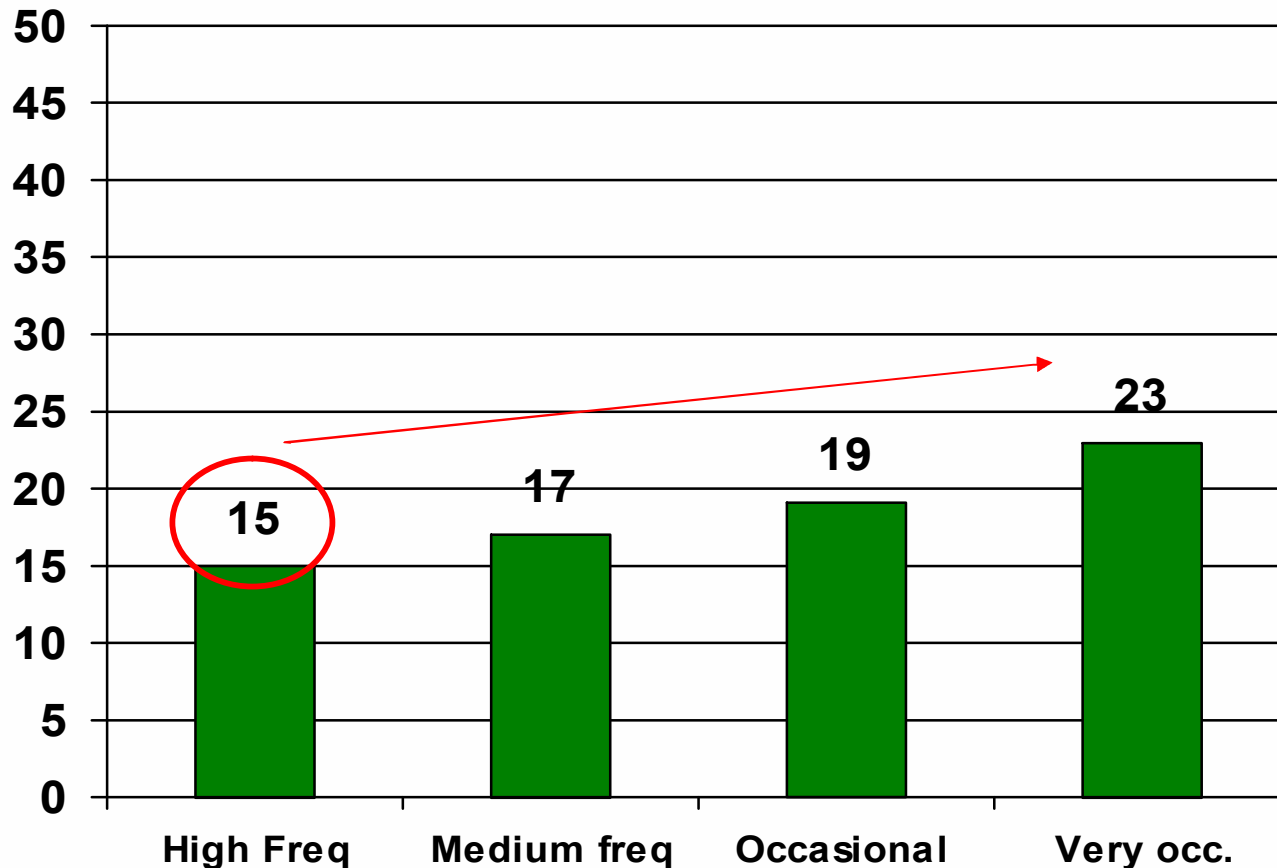


Reasons for not buying more often by demographics - “Too many problems with ripeness”: All respondents

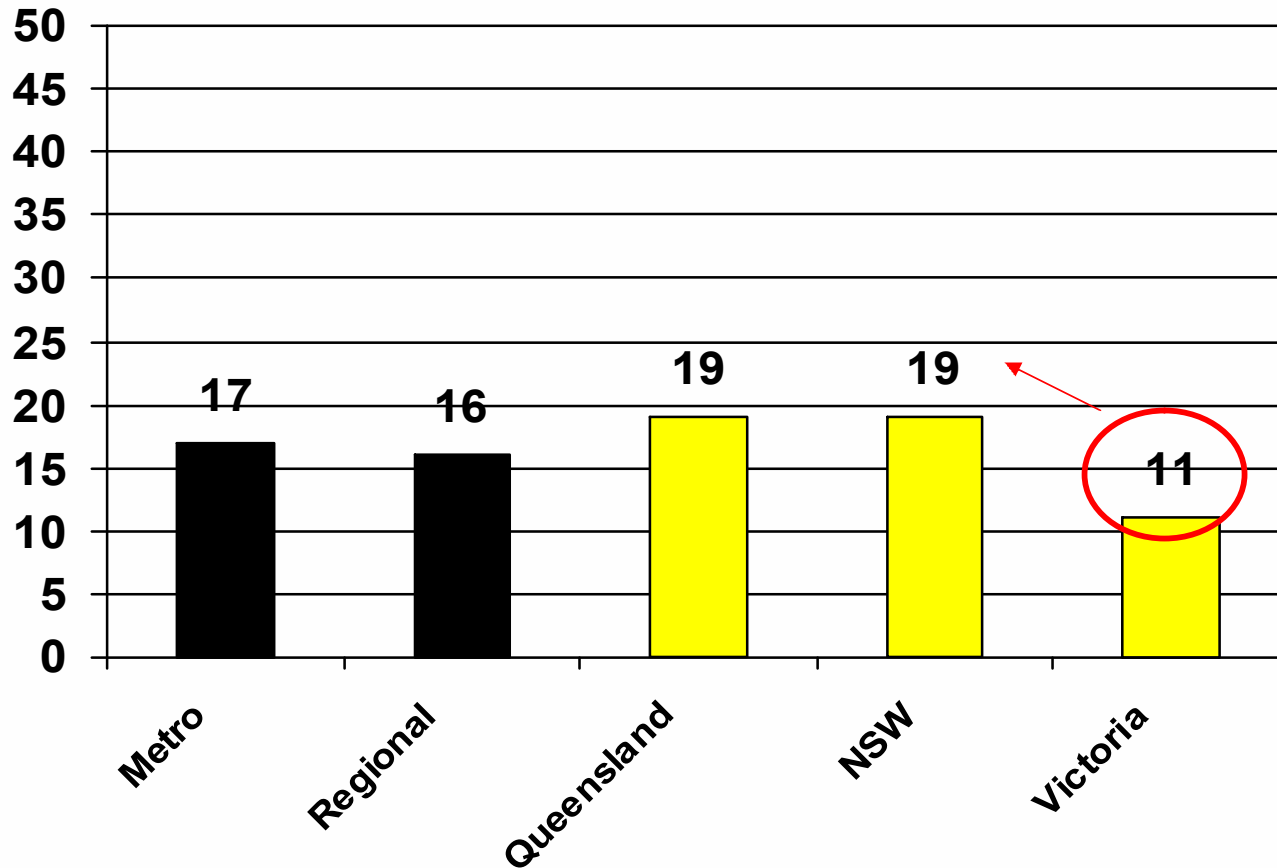


Reasons for not buying more often by frequency

-“Too many problems with ripeness”: All respondents

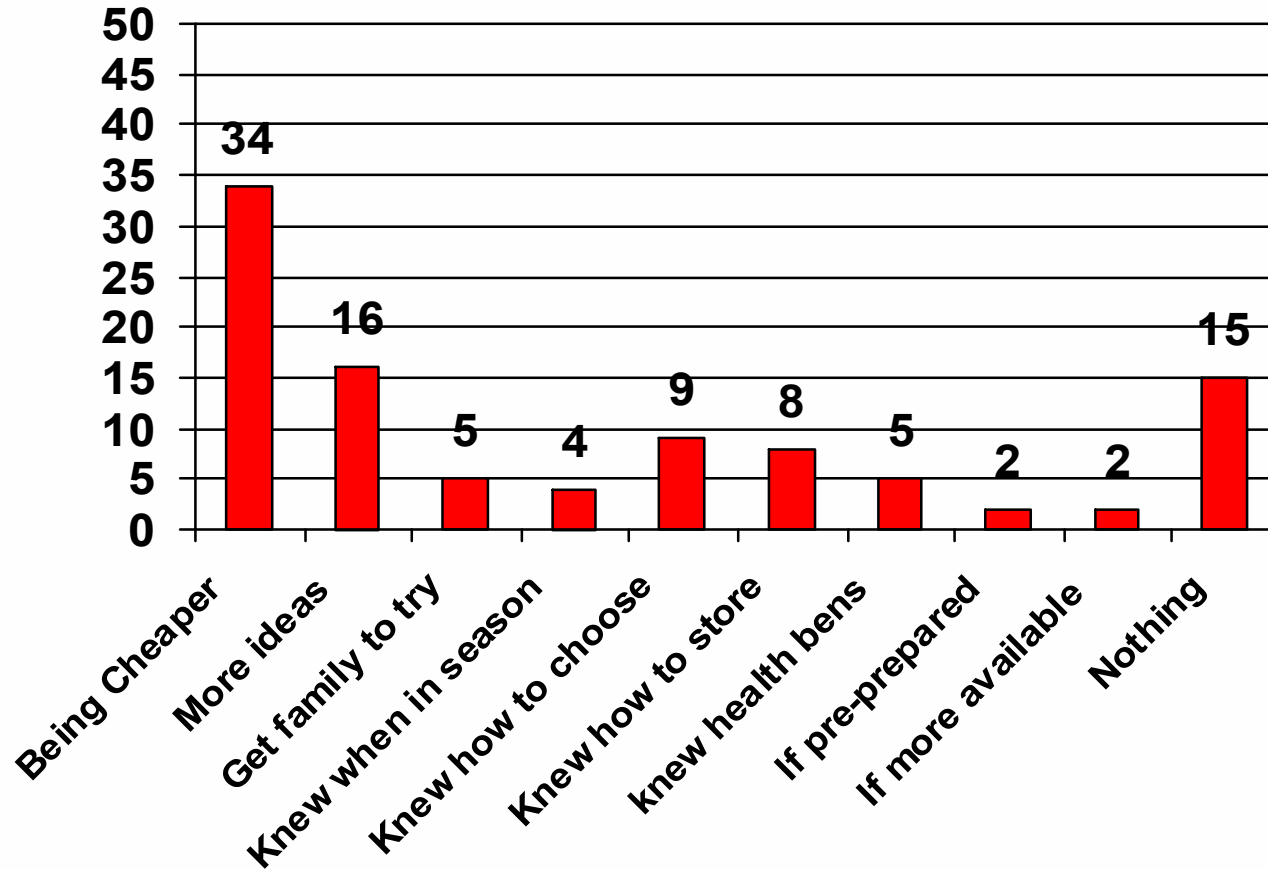


Reasons for not buying more often by state - “Too many problems with ripeness”: All respondents

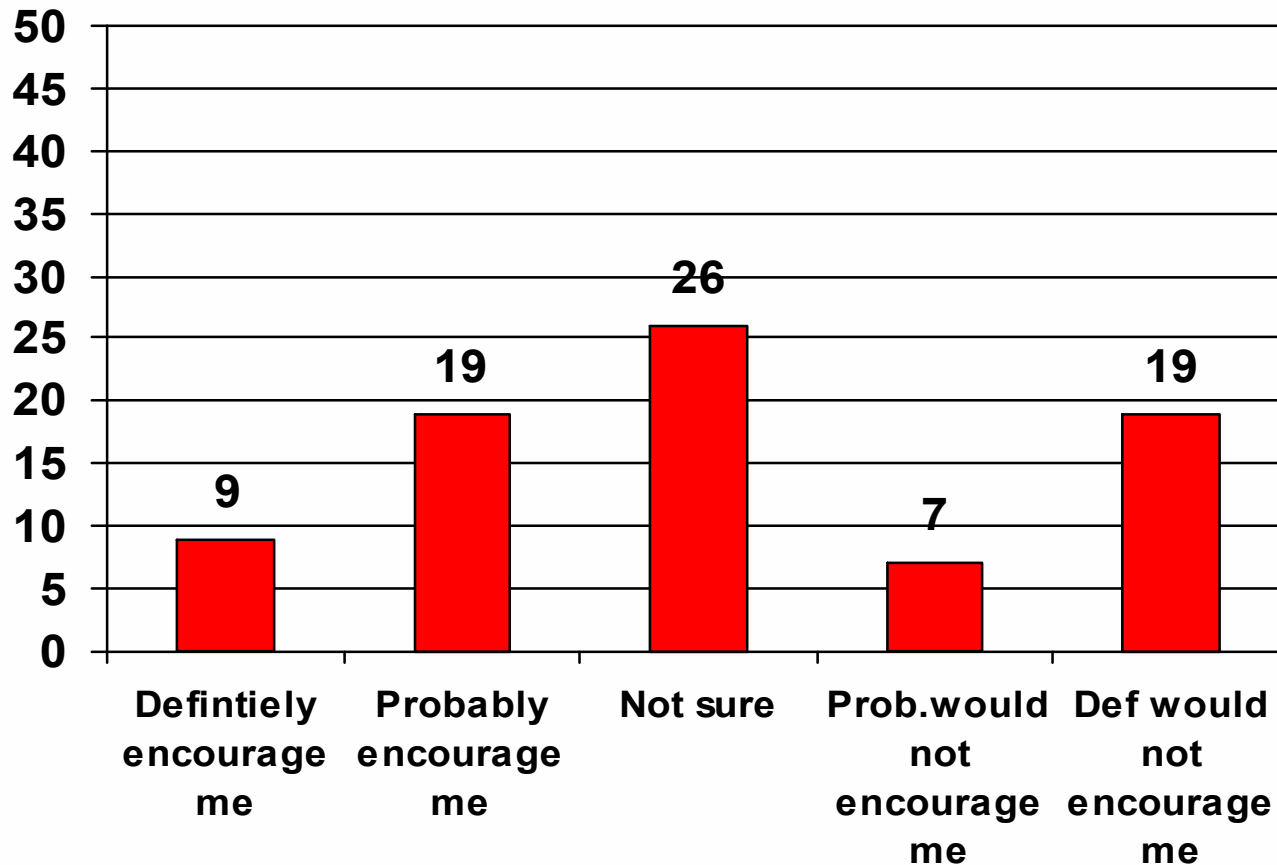


Prompting purchase

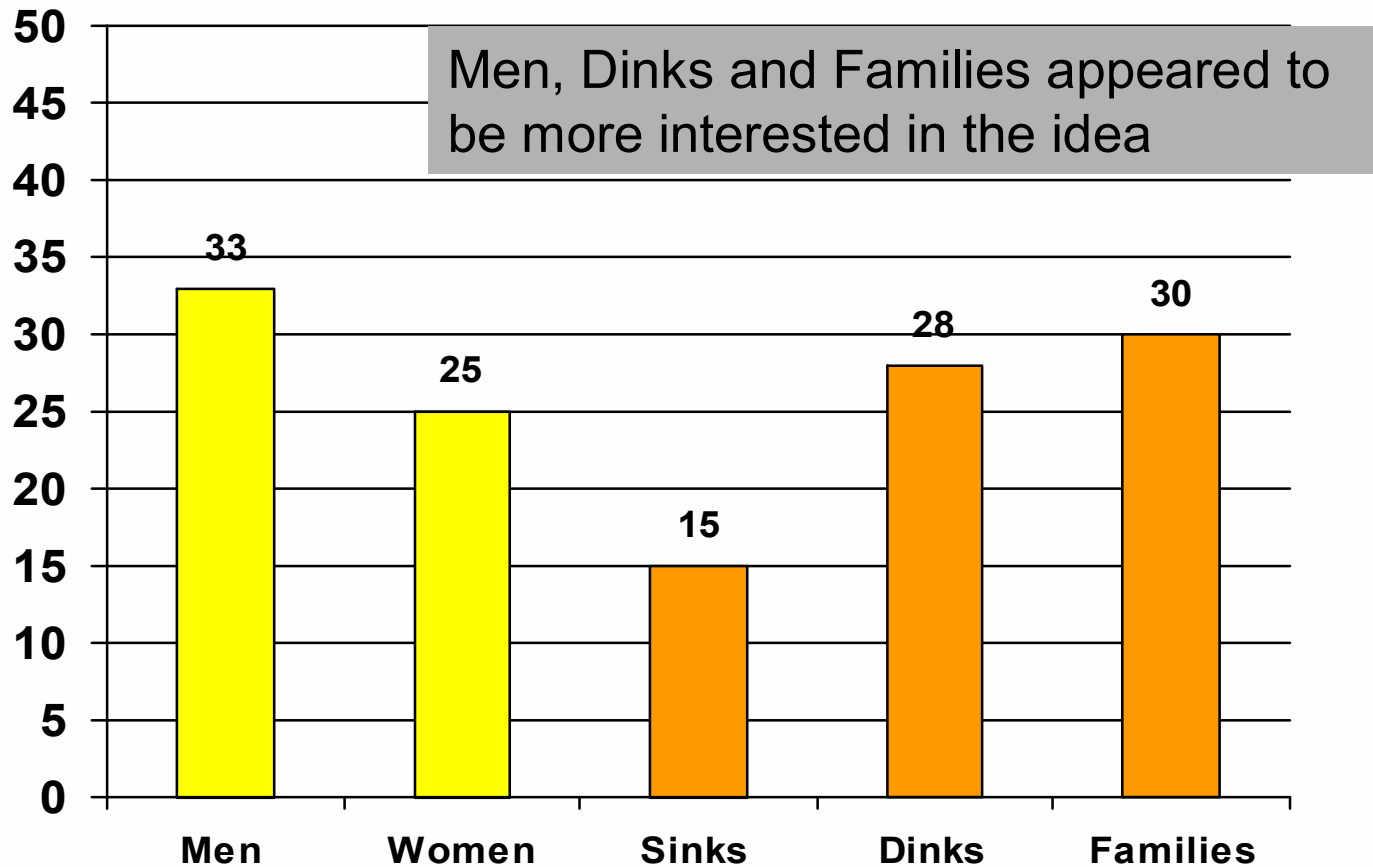
What would help most in prompting purchase: All respondents



Propensity to buy more if pre-packaged formats available: All respondents



Propensity to buy more if pre-packaged formats available: All respondents



Some concluding thoughts

Conclusions

- Clearly penetration of purchase is high, although targeted activity might well provide benefits in certain areas (e.g. lower income and Victoria). Amongst those purchasing fruit purchase appears strong (5.6 per month). Overall an extremely good job appears already to have been done in promotion to consumers
- Use in sandwiches and salads dominate, although a reasonable variety of use exists. With use on hot dishes the only obvious weakness
- Price is clearly a barrier to greater purchase
- Overall the image of Avocados appears very strong, and requires only to be maintained



Bread & Butter

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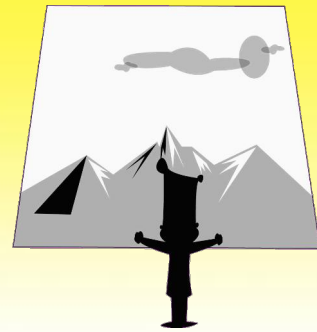
PROJECT PULSE

Stage 2 Qualitative Debrief
Avocados Australia

Bread & Butter Research & Planning



Background to this stage



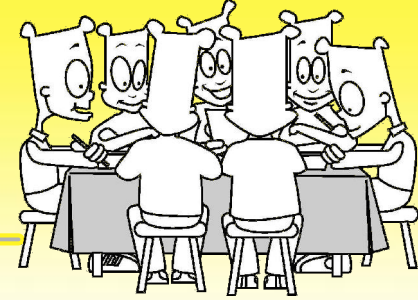
- Up to this point, several stages of research have already taken place
 - **Qualitative groups with avocado buyers**
 - **Depth interviews with key food industry individuals**
 - **Quantitative research against a national sample of main grocery buyers**
- These were followed with a workshop to determine the potential strategies for Avocados Australia moving forward
- The key strategies to be explored in further depth in this project are :
 - Advocating and encouraging the usage of avocados as a spread
 - Potential future health claims

Key research objectives for this stage



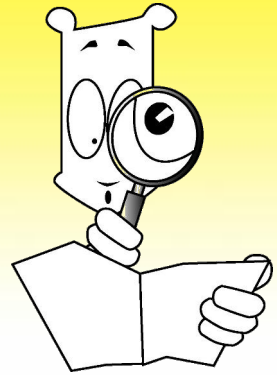
1. To explore reactions towards various strategies and messages intended to increase spread usage among avocado users, to determine which hold greatest potential
2. To explore reactions towards various health claims for avocados to determine interest, understanding, appeal and potential impact of each, to identify the most potent, that can then form the basis of a communication brief

Who we spoke to...



Grp	Avocado purchasing	Lifestage / demographics	Date / time
1	Occasional purchasers Purchasing monthly to once every 3 months	Mums with young children at home (Under 12 years) PT working / home duties Grey / blue collar	Quakers Hill
2	Occasional purchasers Purchasing monthly to once every 3 months	Mums with older children at home (High school age) PT working / home duties Grey / blue collar	Quakers Hill
3	High / medium purchasers Purchasing weekly / fortnightly	Mums with older children at home (High school / adult) PT / FT working Grey / white collar	North Sydney

The agenda for today



- Profiling our two audiences
- Current spread behaviour
- Introducing the spread concepts
- Exploring health claims
- Final strategic recommendations

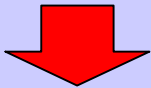


Profiling our two audiences

As recruited...



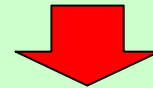
- PT workers / home duties
 - Grey / blue collar
- Purchasing avocados monthly to once every 3 months



“Learners”



- FT workers
 - Grey / white collar
- Purchasing avocados weekly / fortnightly



“Converts”

Some general observations



Learners

- Much more budget conscious
 - More likely to place ease / convenience above health considerations for meal preparation
e.g. salads / veggies get less of a regular look-in
- Less adventurous tastes / less exposure to 'café culture'
 - Tend to place family / budget before their own needs / wants



Converts

- Much less budget conscious
 - More likely to place health considerations above ease / convenience for meal preparation
e.g. make the effort to serve a salad with mid-week meals
- More adventurous tastes / work lives provide exposure to 'café culture' and changing food trends
- Place as much importance on their own needs / treats as looking after the family

Attitudes to avocados



Learners

- Some outright rejectors (purchase for others in family)
 - Some ambivalent
- Some frustrated enjoyers (“but the rest of the family won’t eat them”)



Converts

- Generally accepting and enjoying themselves
- More likely to be eaten by most of family

And behaviour / usage...



Learners

- Tend to buy for planned dishes / occasions
 - Lack confidence and knowledge to use avocados outside these occasions

E.g. specifically for nachos,
for an entertaining salad,
for hubby's sandwiches,
in a dip for a particular occasion

**Buying for specified,
planned occasion/dish**



Converts

- Tend to buy as a regular purchase (part of the weekly shop)
- Regular repertoire of uses and look for new uses

E.g. range of regular sandwiches,
everyday/week salads, on toast, in
pasta, with seafood, as a dip,
on nachos

**Buy for their versatility,
decide how to use once home**

Knowledge of avocado health benefits



Learners

- Know little / nothing beyond assumed healthiness due to being a fruit/veg
 - Some association as a 'good fat'
- But counterbalanced with being high in fat
- And confusion over relationship with cholesterol - high? Low?

**Little knowledge
and some confusion**



Converts

- Consistent acceptance of avocado as a good fat/oil
- Which for some translates to helping cholesterol levels
- And for others links to healthy skin (supported by avocado oil in skincare products)
- Much less confusion, although little additional detail as to specific nutritional contents

**Basic knowledge - strong association
as good fat, but little else**

Why they buy / don't buy...



Learners

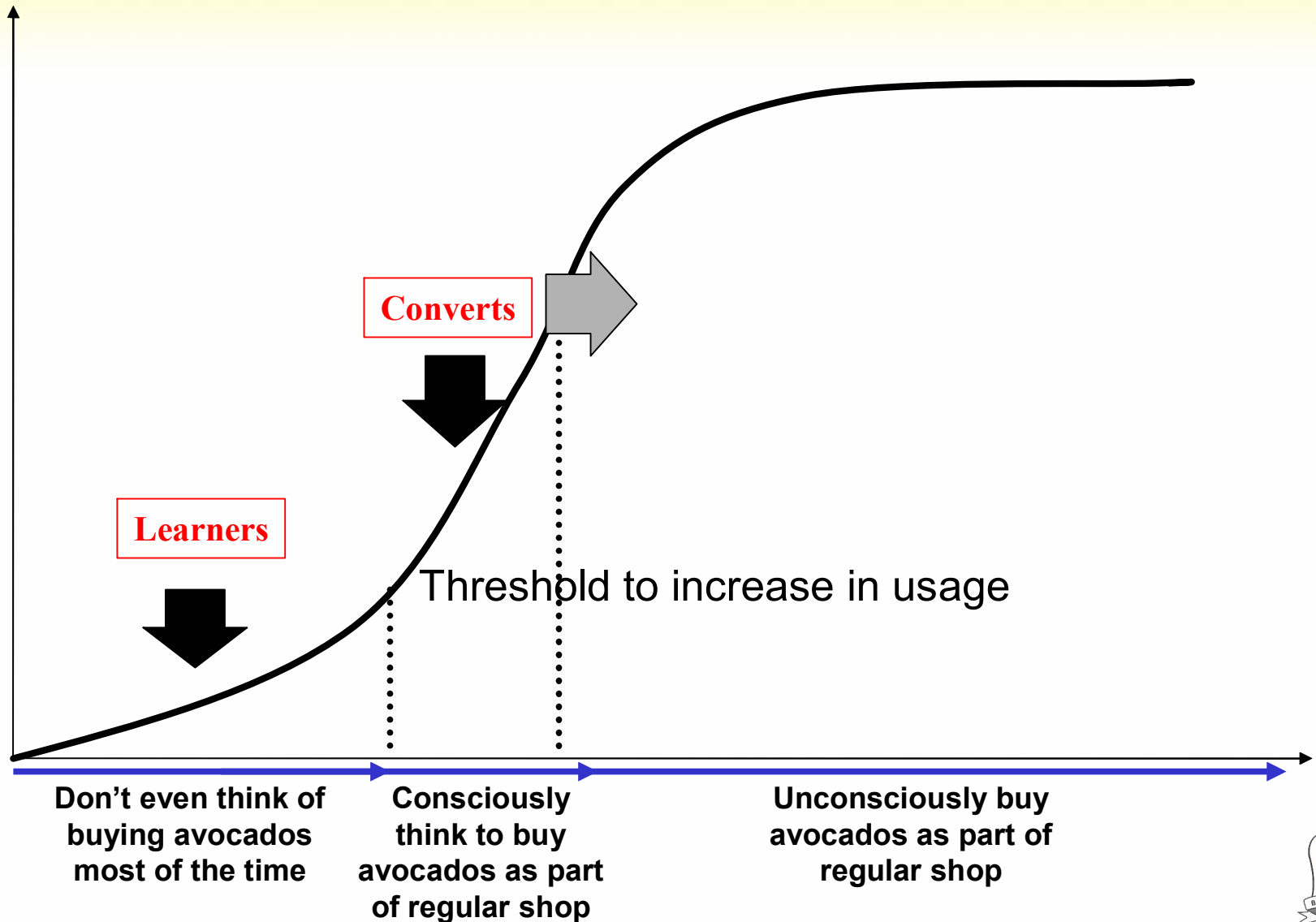
- A mix of reasons for infrequent purchasing :
 - The whole family won't eat them
 - They are deemed an expensive purchase
 - They struggle with how to use them
 - And as a result they don't often think to buy them
 - And have no strong reason to buy more often



Converts

- Why they are frequent buyers :
 - Love the taste / flavour
 - See them as very versatile
 - A healthy food - good nutritional value

Adoption curve for avocado





Current spread behaviour

Using avocado as a spread



Learners

- While some do (v. low freq.),
 - most don't
- Those that do, do so in a specific sandwich / specific snack - as a taste complement
- And were introduced through bought sandwiches or eating at a friends place
- And often not for self - usually the request or instigation of someone else in the family



Converts

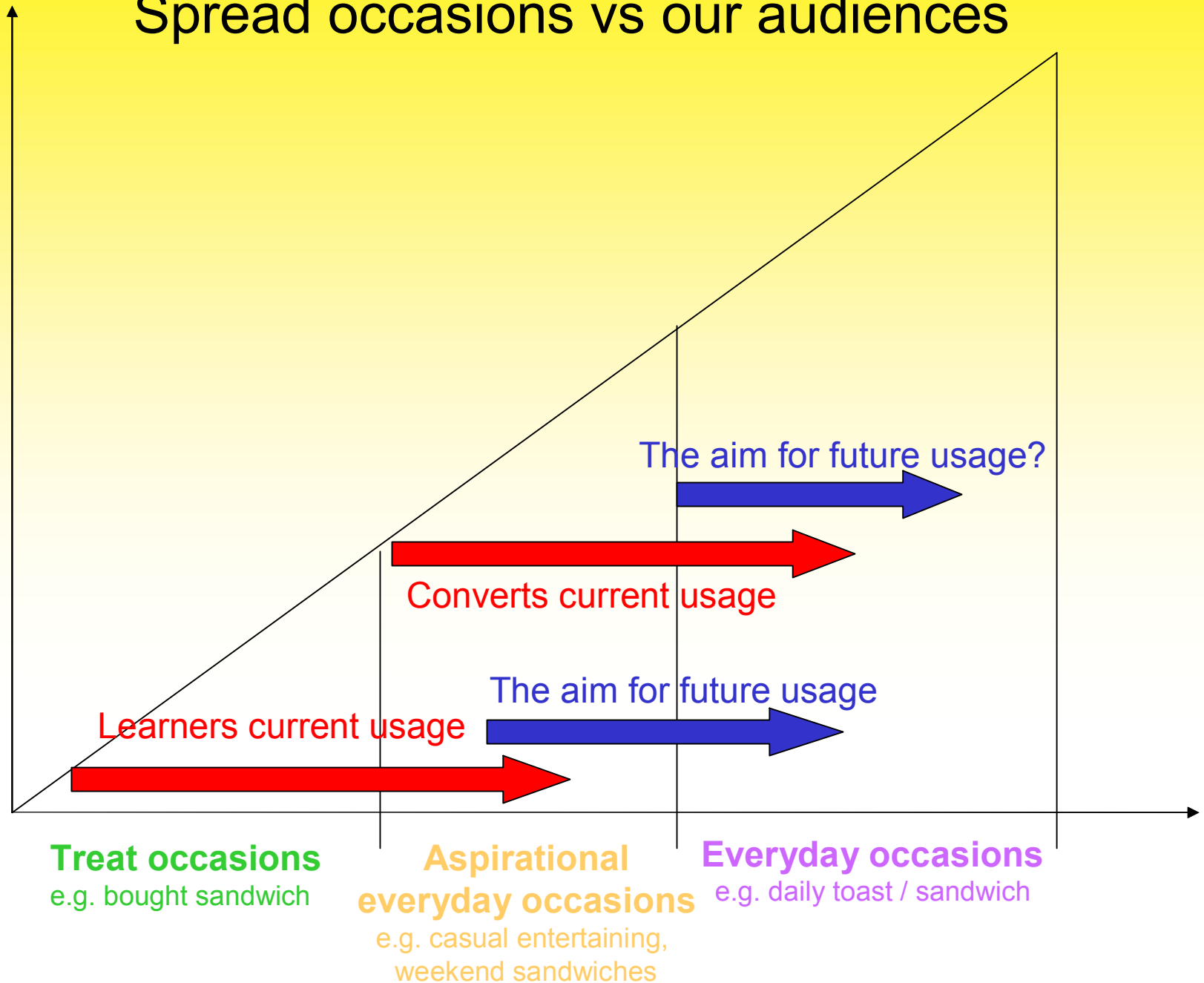
- All/most were frequent (several times per week) spreaders
 - Toast
 - Sandwiches
- Mainly for self/hubby, rather than packing in lunchboxes
- Mostly as a butter replacement - a healthier alternative
- And therefore used across a range of fillings, not just in one particular sandwich
 - Except "Sweet"

Many of the Converts use Avocado to replace butter, rather than margarine

- Nearly all Converts are already using Avocado as a spread.
- Before using Avocado they were more likely to use butter than margarine. However for several neither of these feature in their family's diet anymore. Avocado has become a total replacement. The reasons for this are:
 - Taste
 - Not artificial/natural - however, butter is not seen as artificial so it is unlikely that this is a major reason for choice
 - Cholesterol – butter is bad for cholesterol, Avocados are good.
'Its better for my cholesterol'
It's mono unsaturated fat'
- Learners are more likely to use margarines as a spread, but already have concerns about it not being natural
 - *'I buy margarine, but only use a little bit'*
 - *'Margarine has rubbish in it – bits & pieces'*
- As we will see later, these perceptions have an influence on which of the new spread platforms are most appealing.



Spread occasions vs our audiences





Introducing the spread concepts

Avoiding Waste

People often find that they have avocado left over from salads, and other meals, and struggle to think what to do with them. This means that a lot of avocado goes to waste.

Using avocado as a spread in sandwiches, as an alternative to margarine and butter, is a smart way to avoid waste by throwing less in the bin.

This did not motivate either audience



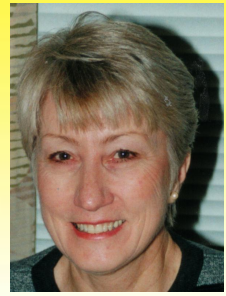
- The frequent purchasers (Converts) rarely struggled with ways to use the leftover avocado - except when it was simply forgotten about!
- And the more budget conscious 'Learners' claimed to make an effort to use up what there was because they could not afford to waste food, particularly an item that was considered to be a more expensive purchase
- In addition, this was not a strategy to encourage increased use - merely ensuring that which had already been bought, was used
- No consumption benefit indicated

Health by Stealth

Many mums find it difficult to get their children to eat enough fruit and vegetables.

Avocados used as a spread in children's sandwiches are a clever way to add to the daily fruit and vegetable count. Avocados the healthy natural spread for kids.

This was too complex an issue for the simple avocado



- While getting kids to eat enough fruit and veggies was always an issue, it was not one that avocados were deemed suitable to solve. Avocado don't start from the position of being "Child" friendly
 - "Milo" achieves this strategy by adding milk and other benefits to something children already like - chocolate. This is simply not the case here
- If kids won't eat it, they won't eat it!
- Even if you try to sneak it in, they will spot it and either pick it out or simply not eat the entire sandwich
 - Which is even worse!
- School lunches are about making sandwiches that are low risk - fillings they will like to make sure they get eaten
 - This is not avocado territory!

The multi vitamin spread

We all need our vitamins and minerals and many of us take vitamin supplements to help our diet.

Avocados are nature's multivitamin packed with goodness. Spreading avocado on bread in sandwiches is the easy way to help you get more of the vitamins and minerals you need.

This concept assumes a level of knowledge that doesn't currently exist



- Given the current lack of knowledge regarding the nutritional value of the avocado, this concept was a step too far
- These women wanted to know more about what was actually in an avocado to give them a legitimate reason to believe this concept
- Only when a basic understanding has been established can this form of positioning be credible and meaningful
- Therefore this is too advanced for the current level of knowledge that exists
- Plus the 'Learners' were skeptical regarding how much / how often this would need used in this way to provide any of the benefit described

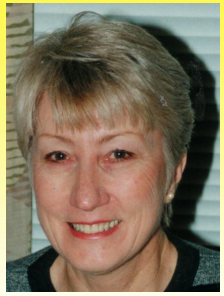
Avocado – Create your own Gourmet Sandwiches

City cafes now offer a wide range of gourmet sandwiches. However, you often find yourself using boring traditional fillings at home.

Using avocado as a spread provides you with the perfect base to create more indulgent homemade sandwiches which are as pleasurable to eat as the café made originals.

The exotic and distinctive avocado is the ideal gourmet alternative to margarine.

Less relevant to the Converts



- This is an idea they agree with - Avo = “gourmet” occasions
- But many already do:
 - As full time workers, many are buying their ‘gourmet sandwiches’ on a regular basis
 - And as frequent avocado users, and spreaders, they already use it to try to liven up their sandwiches as often as possible
- Therefore for many - you are preaching to the converted
- For others who do not do the ‘gourmet sandwich at home’ very often - as working mums, this is simply too much time and effort for them alone
- There is an opportunity, but its limited



But the Learners need some guidance



- This said, these women did want help
- If given a good enough reason to use as a spread, they also needed to be shown the types of occasions that this would be suitable for - so they could give it a try
- The gourmet sandwich idea was not necessarily the answer per se
 - This is not something they would be motivated to make very often
 - And seems a lot of effort
 - they need more than a lifestyle benefit to change behaviour
- But a more mainstream example of a suitable usage would help them get started
 - E.g. on toast with tomato and black pepper, spread on a cracker, instead of the butter in their regular cheese & ham sandwich
 - Occasions and snacks that are within reach, but still aspirational

Avocado – Bring extra taste to your sandwiches

Today's margarines add little real flavour to our sandwiches, often acting as nothing more than something to make the bread less dry.

Instead, using an avocado as a spread adds a fantastic delicate, yet smooth and creamy taste to complement your favourite sandwich.

If you already use avocados in your salads, why not start livening up your sandwiches with yummy avocado spread.

Won't convert the sceptics



- While the Converts already are in love with the taste of avocado
- Many of the Learners are not and face overt rejection on the grounds of taste (real or imagined) amongst family members
- Therefore moving straight to a taste argument is a step too far for most of these consumers
 - It will need to be more than taste to get them going
 - Particularly when they are not sold on the taste

The Natural Spread

Do you ever wish that there was a healthier alternative margarines.

Avocados are nature's answer to margarines, a healthy solution for those that want to eat as naturally as they can and lower cholesterol. Avocados are nature's spread as they spread straight from the fruit with no additives of any kind.

The strongest message!



- Most of the Converts were doing this to a large extent anyway
- Therefore this confirmed their beliefs and helped to reinforce the behaviour they were already instituting - and made them comfortable to continue to do so - potential to increase into the mainstream
- For the Learners, this was the motivation they were looking for to justify a gradual change in behaviour
 - While all use margarines regularly - all know and agree that there must be better alternatives
 - And this provides a good reason to start to use avocado in sandwiches etc - more than “gourmet” image (this merely supports)
 - But they still wanted the additional push of making this as easy as possible, by showing them suitable occasions / dishes

But what sandwiches do they currently eat and therefore will this fit?

What is a sandwich?



Learners

- For the majority is still mostly very basic (for themselves / family)
- e.g. white bread with vegemite, peanut butter, jam, ham & cheese
- The occasional salad/Meat & salad sandwich for self / hubby
- But hardly, gourmet territory

Very basic, child/budget-friendly sandwiches



Converts

- Still make the more basic sandwiches as part of the lunch repertoire
- But also often more salad sandwiches or avocado-friendly ingredients, e.g. chicken
- Making a greater effort to get more veggies into themselves / the kids
- And more influenced by the bought café sandwiches

Greater emphasis on the healthier, multi-ingredients (salad) sandwich



What is a sandwich?



Learners

A quick fix

Very basic, child/budget-friendly sandwiches



Difficult to simply add avocado



Converts

A flavoursome healthy meal substitute

Greater emphasis on the healthier, multi-ingredients (salad) sandwich



Avocado a more natural fit
- is this because their everyday sandwich repertoire has been adapted to cater specifically for avocado?

Understanding the spread occasion spectrum

- Converts started here
- These are occasions which begin the exposure to avocado as a spread
- Often through bought food at cafes, sandwich shops etc
- Is often a healthy 'treat' to self

Treat occasions
e.g. bought sandwich

- This is the next step on
- Using avocado in the home as a spread - beginning with slightly more special occasions
- E.g. weekend lunches, casual entertaining
- Experimenting with avocado as a spread in ways that are both simple and can involve the family

Aspirational everyday occasions
e.g. casual entertaining, weekend sandwiches

- This is the final step
- But it is not an easy starting point because it requires largest behaviour change
- Avocado will not easily jump into everyday sandwiches without gradual increase of exposure first
- Particularly because this is kids lunchbox and mums lunch domain, e.g. Vegemite on white bread, ham & cheese, peanut butter, jam sandwiches
- Hard to envision Learners jumping straight into adding avocado

Everyday occasions
e.g. daily toast / sandwich

Where to introduce spreads to Learners

- The logical starting point for initial exposure
- But not for these bluer collar Learners who are not as much part of the café / bought lunch culture

- The easy starting point
- Regular weekly occasions
- Where extra effort is the norm
- And where avocado complements occasion & food
- And which exposes entire family

- The ultimate goal once a habit has been introduced
- And is thereby easier for spread to infiltrate more everyday occasions / meals

The aim for Learners



Treat occasions
e.g. bought sandwich

**Aspirational
everyday occasions**
e.g. casual entertaining,
weekend sandwiches

Everyday occasions
e.g. daily toast / sandwich

In summary...



Learners

Key message = natural spread

- Reason to change behaviour

Demonstration = aspirational
everyday occasions, e.g. weekend
sandwiches, 'special' effort lunches

- Show them some occasions to start them off
- 'I can do that'



Converts

Key message = natural spread

- Confirmation that current behaviour is justified

Demonstration = some more
mainstream everyday occasions, e.g.
daily sandwiches, on toast/crackers

- The next step of occasions
- To encourage increased regular usage



Exploring health claims

A range of health claims were explored

- All from online resources
- Some which were simple claims, others with the explained health benefit and some as comparative to other fruits/vegetables
- The groups were handed the lists of claims for comment and once they had had time to consider individually, these were discussed as a group

And the groups were surprised and delighted

- Given the relative lack of knowledge across the groups
- All were genuinely interested in what avocados had to offer at a nutritional level
- But no-one expected the number of viable claims, or how powerful some of them were
- All in all, everyone left the groups wondering why avocados had hid their light under a bushel for so long!
- It is time to give them more information!!

Contain 14 minerals,
(including iron, copper
and magnesium)
to stimulate growth

- A mineral story is deemed not as strong as a vitamin story
- The idea of stimulating growth appears to target kids (problematic)
- Overall, not a powerful claim

The most nutritious fruit,
according to the
Guinness Book of Records

- The idea of being the most nutritious fruit (i.e. better than any other fruit) appeals to some
- But the Guinness Book of Records as the quoted source lacks credibility - too frivolous and associated with silly world record attempts

More vitamin B1, B2, niacin,
folate, potassium and
magnesium per serving
than any other fruits
or vegetables

- A very strong claim for 2 key reasons :
 - A list of specific vitamins / minerals are cited - and even though you may not know what all these things do, everyone knows that you need them in your diet
 - And having more 'than any other fruits or vegetables' is a very strong claim placing avocados at the pinnacle in terms of nutritional value and hence importance in the diet

Weight for weight, avocados contain more folate than any other fruit

- not only essential during pregnancy to prevent spina bifida,
- but vital for everyone to help the body produce new cells and help protect against heart disease

Avocados are not only cholesterol free, but eating avocados regularly can actually lower your cholesterol (more than a low fat diet)

Excellent source of dietary fibre

- Too focused on folate
- While well-associated with pregnancy, folate is not well known for playing an important role elsewhere
- Therefore, lacked interest for many
- Potential to play an important supporting role in the 'natural spread' story
- Not only clears up any confusion over its relationship with cholesterol for Learners;
- But also cements its position as playing a positive role in the diet, which lends additional credence to the 'natural alternative to margarine' position
- Aren't all/most fruits and vegetables - so what?

A rich source of Vit E and
other anti-oxidants
- which slow ageing
and protect against cancer

Avocados are a rich
source of vitamin A
– necessary for good eyesight
and a strong immune system

Avocados are the richest
source of vitamins B1 and B2
in the fruit world
– both of which are crucial for
healthy skin

- Hits 2 very top-of-mind concerns for these women :
 - Ageing
 - Cancer
- And therefore was of enormous interest to some
- Particularly since talking about ‘anti-oxidants’ is very current
- Competing with carrots!
- Difficult to see avocados adopting this high ground given the strong association with carrots, Vit A and good eyesight
- Many saw this as an alternate ageing story, rather than a healing / internal health story
- And therefore not as strong a story as the anti-oxidant one
- Plus by some, deemed to be the role of skin creams, rather than diet

Contain more potassium
than bananas

- While a powerful statement to make, and one which clearly says that avocados are very good for you and nutritionally-rich;
- It lacks some believability given how accepted the bananas = high potassium story now is
 - They don't want this to be contradicted!

Contain more potassium than
bananas, which lowers the risk of
high blood pressure, stroke,
heart attack and cancer and
promotes rapid healing

- For many, it wasn't necessary to provide the additional information regarding what potassium does - all have bought into the idea that potassium is essential without needing to know the details
- It is simply a 'nice to know'

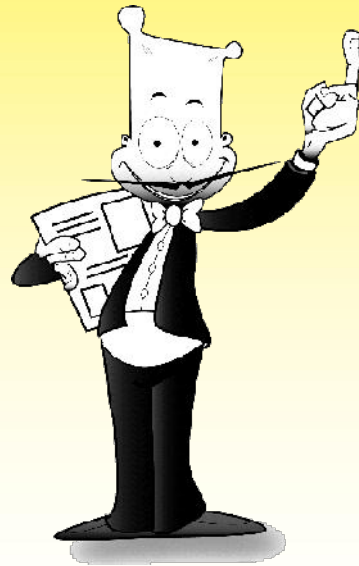
The shortlist

Avocados are not only cholesterol free, but eating avocados regularly can actually lower your cholesterol (more than a low fat diet)

A rich source of Vit E and other anti-oxidants
- which slow ageing
and protect against cancer

More vitamin B1, B2, niacin, folate, potassium and magnesium per serving than any other fruits or vegetables

- Works well to dispel any existing confusion over the 'good fat' argument
- We recommend this to be used to provide a strong 'reason to believe' for the natural spread story
- A supporting argument, not a separate additional claim
- The key here is the idea that avocados have the ability to slow ageing and fight against cancer - two very pertinent issues to these women and hence a strong motivation to keep avocado on the shopping list
- However - an adult argument - not a family one
- A strong message for avocados as an 'all rounder'
- And overtly puts avocado ahead of other fruits and vegetables
- Message may need to be targeted as a 'family consumption' message to ensure context

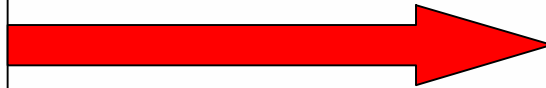


Final strategic recommendations

The overall strategy

- A two-pronged approach...

Short term



The strategy - spread communication (TV?)

The aim - increase avocado consumption among Learners and Converts

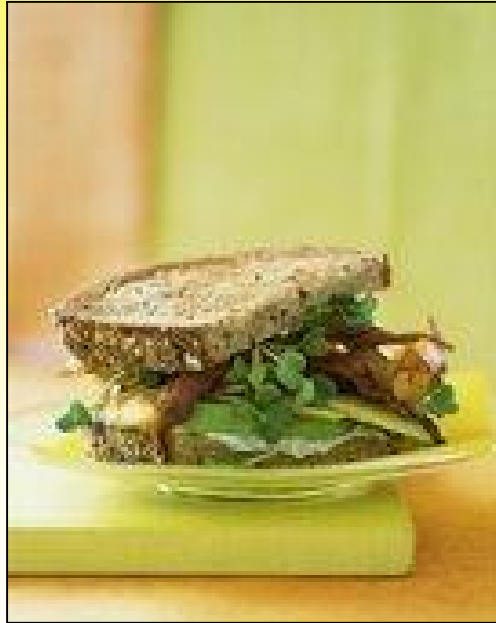
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Long term



The strategy - health claim communication (POS / PR etc?)

The aim - seeding of nutritional information - the next step on from the 'good fat' story, creating a link between a claim and avocados to create a strong reason to adopt avocado into regular fruit/veg repertoire



The spread strategy...

Recommended spread strategy

Core message

“The Healthy Spread”

Avocados are a more healthy & natural alternative to margarine

Support

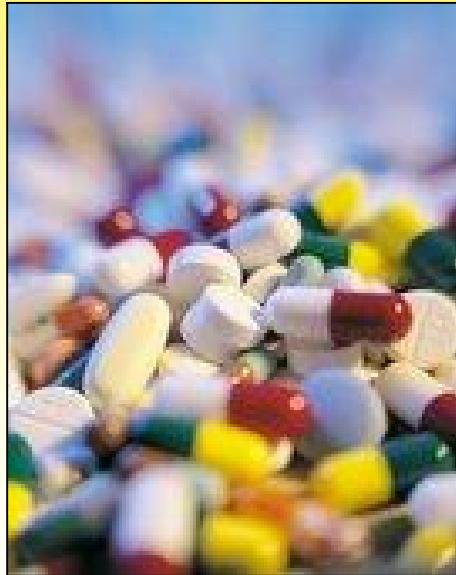
Not only are they cholesterol free, they actually help lower your cholesterol levels

Tone & manner

???

Occasion /
demonstration

Avocado spreads straight from the fruit on to your favourite sandwich or simply onto toast.



The Health claims strategy...

Recommended spread strategy

Core message

(Not only do avocados lower cholesterol), but they have more vitamin B1, B2, niacin, folate, potassium and magnesium per serving than any other fruits or vegetables

Support

???

Tone & manner

???

Occasion /
demonstration

??

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