



AVOCADO CLAIMS TESTING

HORT INNOVATION › OCT 2024

fiftyfive5

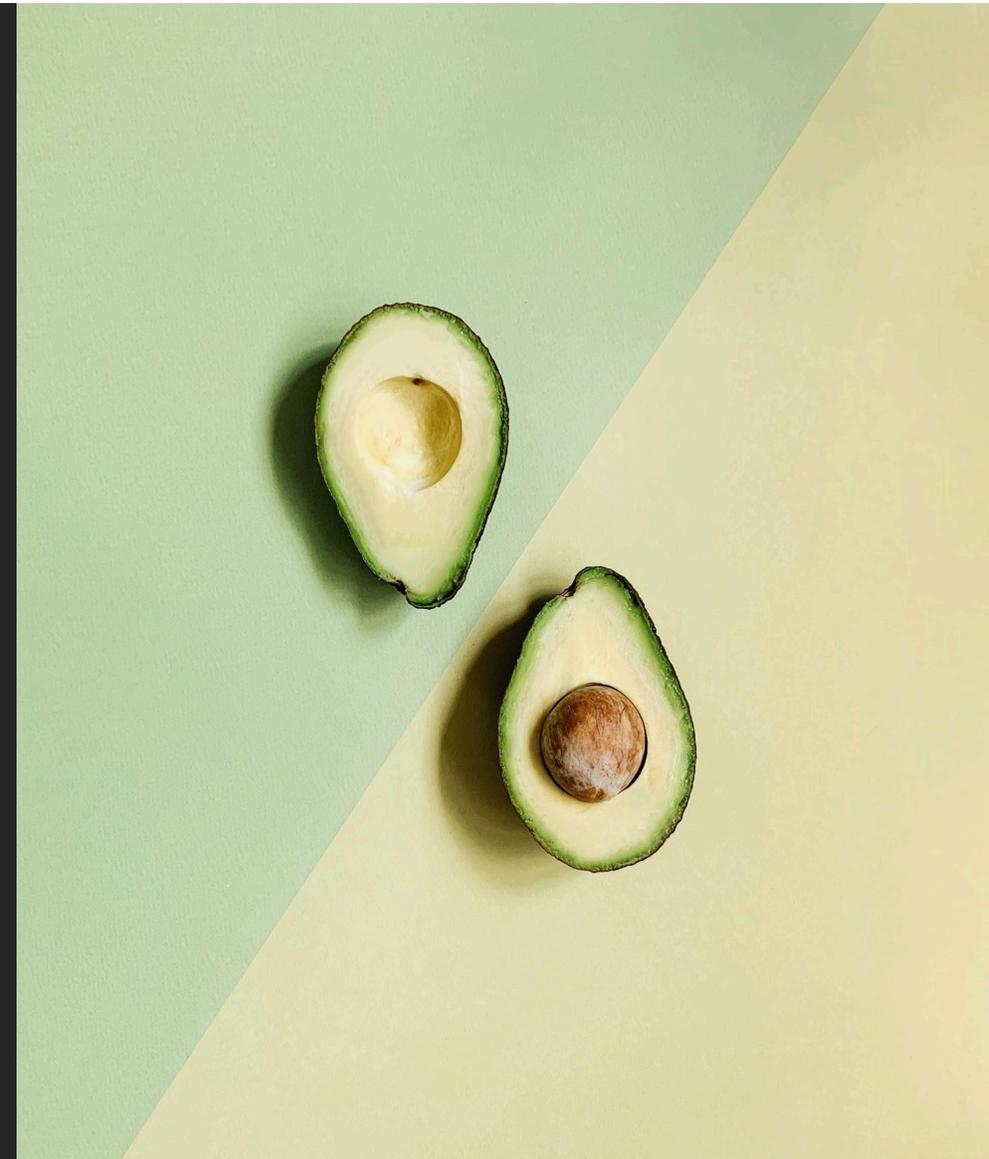
Part of Accenture Song

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SECTION 1

PROJECT BACKGROUND

THE BUSINESS NEED

Due to favourable market conditions causing avocado supply to grow faster than demand, there is a need to drive greater avocado purchase/consumption to align with this growth supply. Avocados are known to possess unique health benefits; research is needed to validate the ability of health claims in driving consumer behaviour and to identify the most compelling health claims to drive penetration of avocados to inform the new creative campaign for FY25.



RESEARCH APPROACH



METHODOLOGY

- 10-minute online survey
- Fieldwork conducted from 27th September – 4th October 2024



SAMPLE

- Consumers aged 18-75
- Purchased avocados in the last 6 months
- Sole/joint decision maker for groceries in household
- Final sample size: n=518
- Data has been weighted to be nationally representative based on age, gender and state

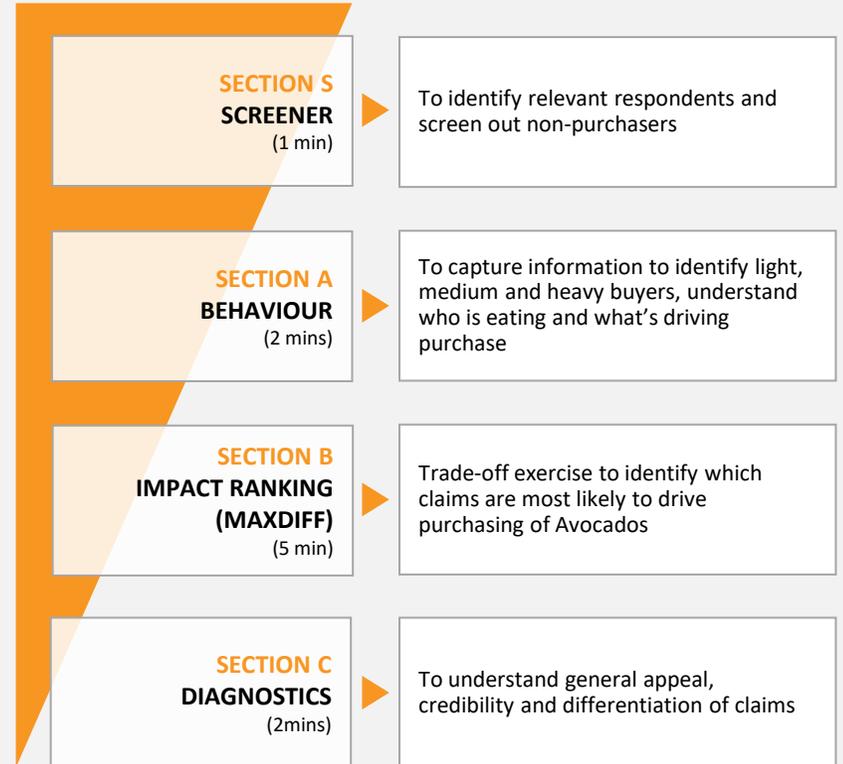


SAMPLE COLLECTION

- Nationally representative based on age, gender and state quotas

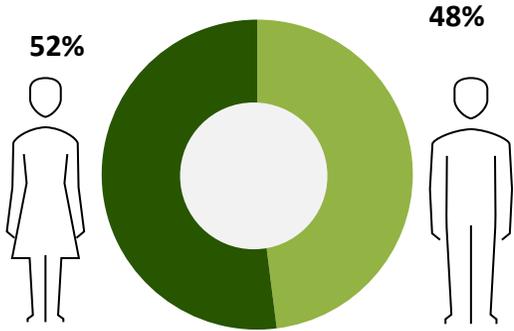


QUESTIONNAIRE FLOW

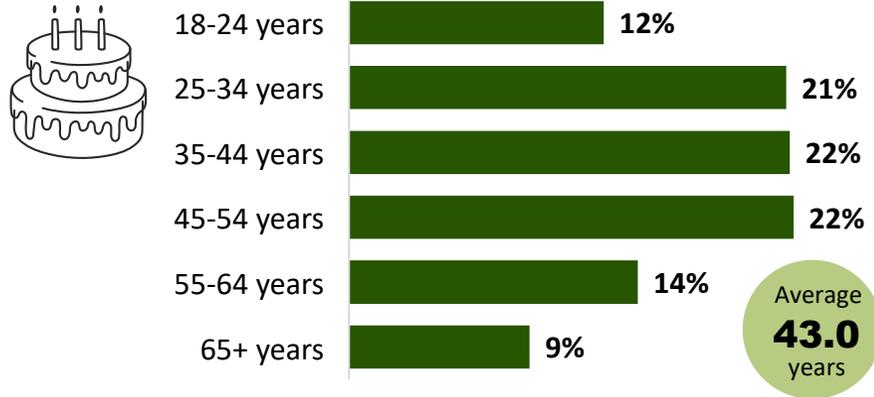


SAMPLE STRUCTURE

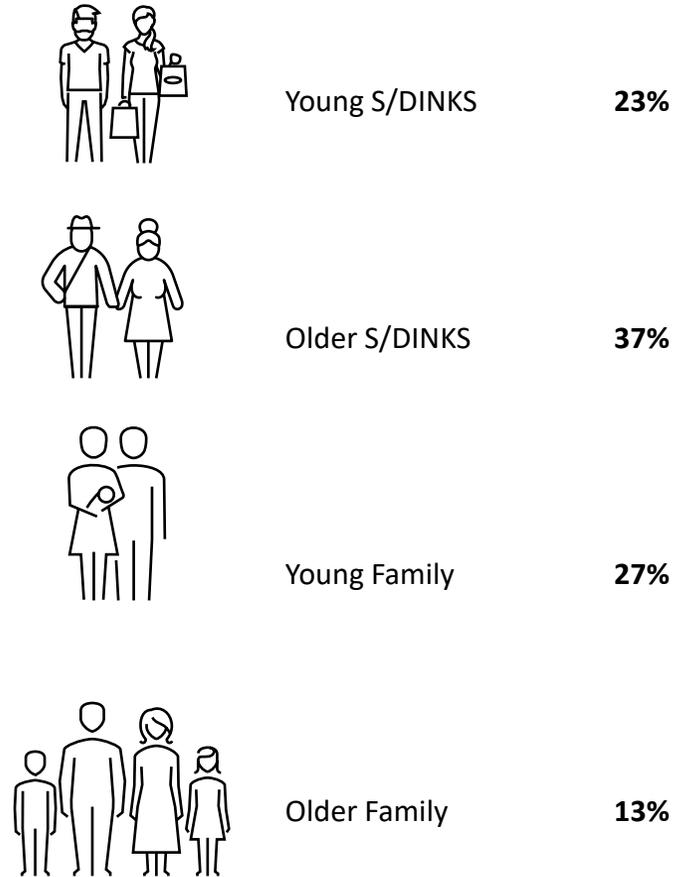
GENDER



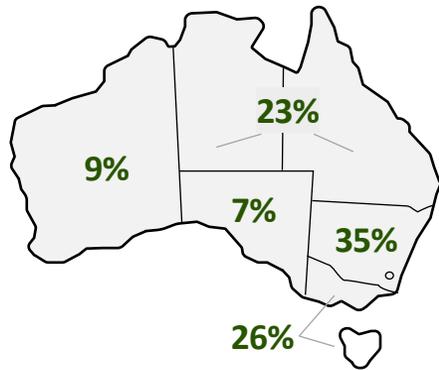
AGE



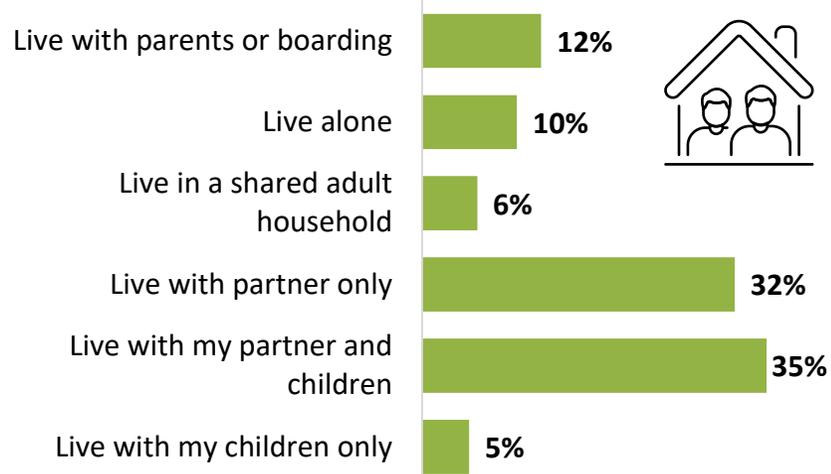
LIFESTAGE



STATE



LIVING ARRANGEMENT



SECTION 2

SUMMARY OF FINDINGS

SUMMARY OF FINDINGS

01

CALLING OUT HEALTH BENEFITS LIKELY TO DRIVE PURCHASING AMONG CURRENT BUYERS

3 in 10 avocado purchasers buy avocados for health benefits, which trails closely to the other top drivers of purchase (taste and price). Specific health benefits sought for include **'Healthy fats, fibre, vitamins, and antioxidants in avocados for overall heart and digestive health'**, **'Anti-inflammatory & antioxidant'** and **'High in fibre, vitamin C, E and K. Provides folate, magnesium and helps produce red blood cells'**.

However, it's less likely to motivate non buyers – amongst those that have not purchased avocados in the last 6 months, none attributed the lack of purchase to avocados not having as many health benefits as other fruits/vegetables.

02

RECOMMENDED CLAIMS TO PROCEED WITH

The three health claims to proceed with are

- **'Stay strong and active with avocados. Avocados contain potassium for muscles and nerves and vitamin K for bones'**
- **'Avocados are rich in folate – essential for a healthy functioning immune system'**
- **'Avocados are an energy booster. They contain niacin, pantothenic acid and folate – nutrients that contribute to energy production'**

These three claims have higher than average scores when it comes to encouraging avocado purchases, appeal and uniqueness compared to other foods.

Whilst 'energy booster' is not as credible as the others, it is highly motivating.

These claims performed similarly among light buyers.

03

HEART HEALTH CLAIMS RESONATE BUT LESS UNIQUE

The health claim **'A healthy, varied diet containing a high amount of both fruits and vegetables, such as avocado, reduces the risk of coronary heart disease'** is the most motivating claim and is more relatable to Older SINKS/DINKS.

Whilst it is not as unique as other claims as there are other foods that talk to this, it could be used tactically (e.g. around Heart Week).

04

CLAIMS AROUND HEALTHY PREGNANCY/ CHILDREN'S GROWTH & DEVELOPMENT/ INFANT NUTRITION RESONATE WITH YOUNG FAMILIES

Not surprisingly, Young Families are more likely to find these claims appealing, credible, and differentiating, and are more likely to encourage more avocado purchase. But in the broader market they are less motivating so unlikely to drive mass behaviour change.

SECTION 3

CATEGORY BEHAVIOUR & PERCEPTIONS

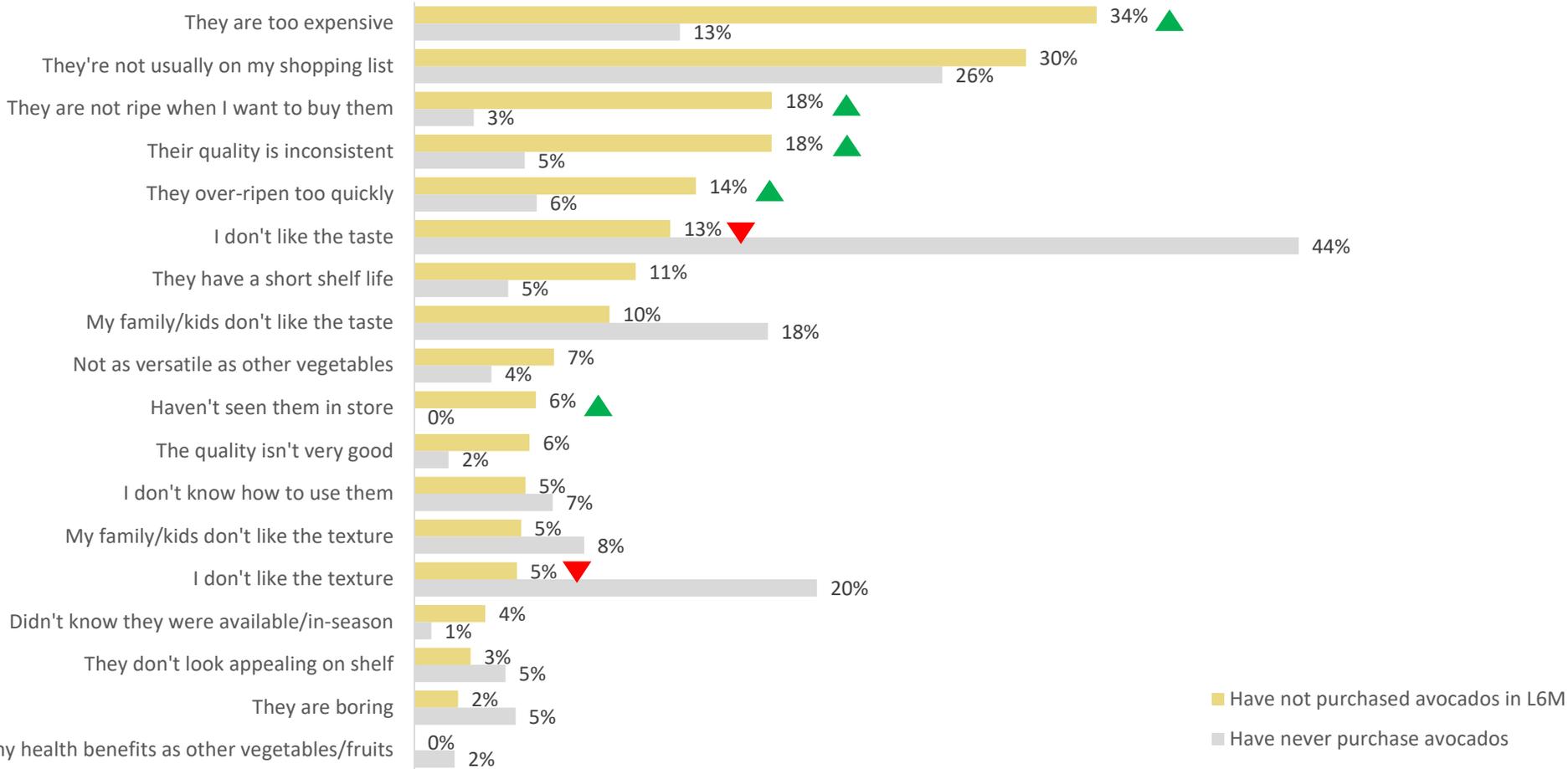
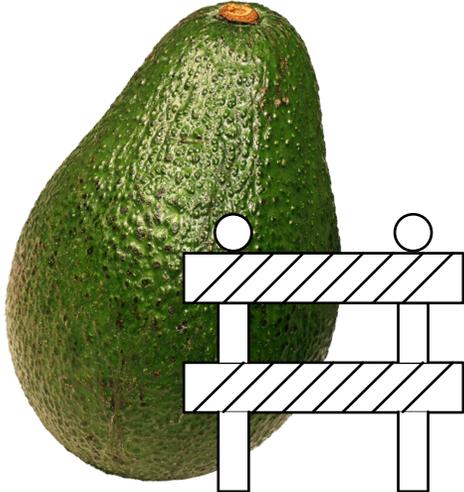
OVER TWO THIRDS OF AUSTRALIANS HAVE PURCHASED AVOCADOS IN THE LAST 6 MONTHS; THIS PROPORTION GOES UP TO 4 IN 5 AMONGST YOUNG FAMILIES

AVOCADO PURCHASE INCIDENCE



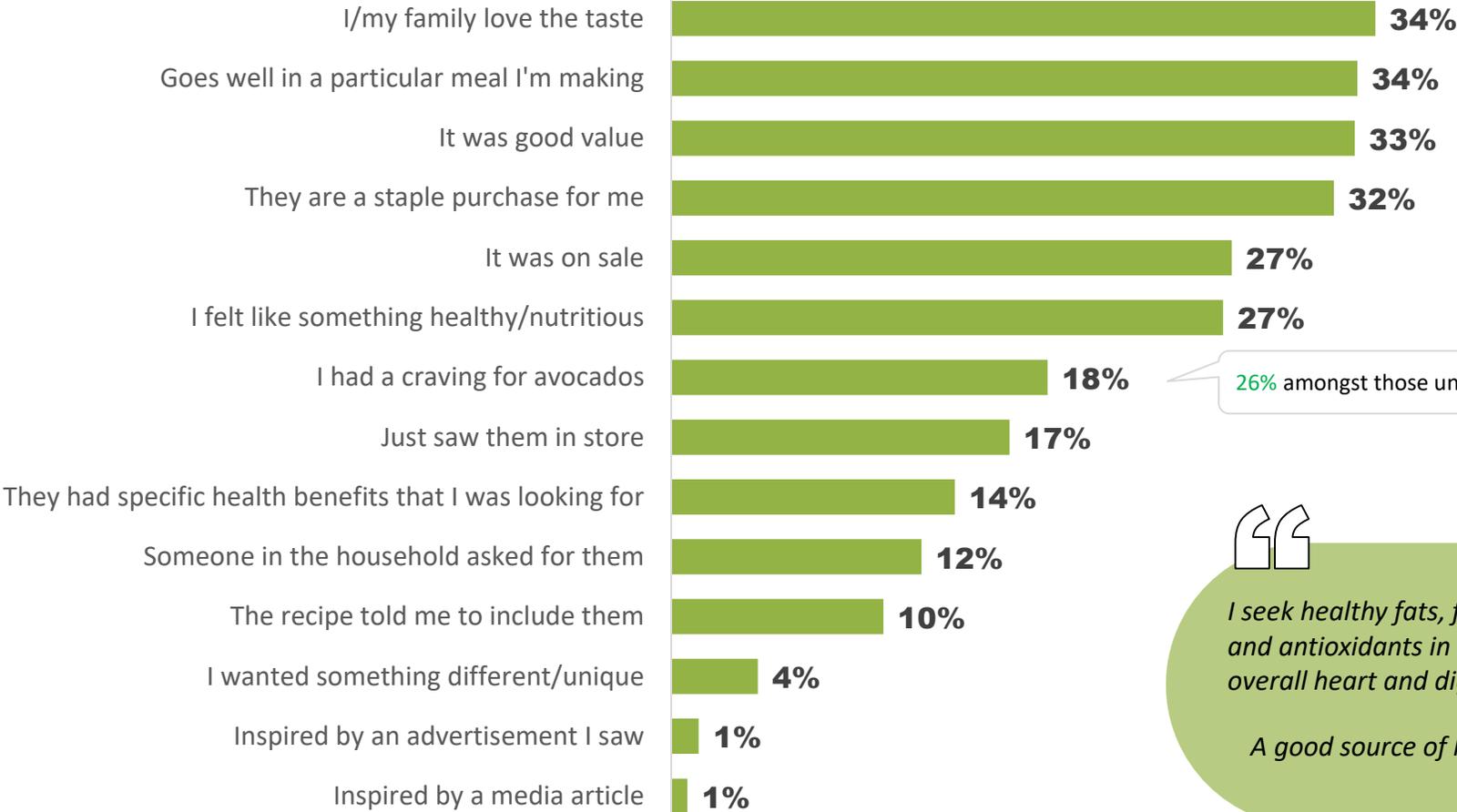
PRICE IS THE KEY BARRIER FOR THOSE THAT HAVE NOT PURCHASED AVOCADOS IN L6M, WHILE TASTE IS THE MAIN REASON WHY OTHERS HAVE NEVER PURCHASED AVOCADOS

BARRIERS TO L6M AVOCADO PURCHASE



TASTE, PRICE, HABIT AND HEALTH REASONS ARE THE MAIN DRIVERS OF AVOCADO PURCHASE

REASONS FOR PURCHASING AVOCADOS



26% amongst those under 35

32%
Buy avocados for health reasons



I seek healthy fats, fibre, vitamins, and antioxidants in avocados for overall heart and digestive health.

They are high in fibre, vitamin C, E and K. Provides folate, magnesium and helps produce red blood cells.

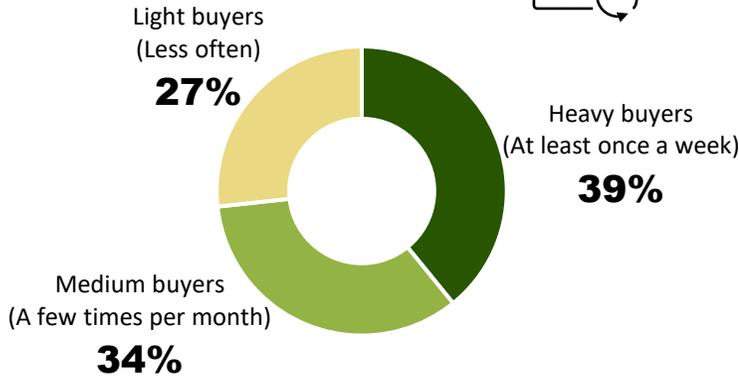
A good source of healthy fat, a source of fibre. Anti-inflammatory & antioxidant.

AROUND 4 IN 10 PURCHASE AVOCADOS AT LEAST ONCE WEEKLY, AS PLANNED PURCHASES. ADULTS ARE MORE LIKELY THAN CHILDREN TO CONSUME AVOCADOS

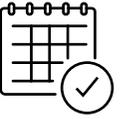


AVOCADO PURCHASE BEHAVIOUR – AMONGST THOSE PURCHASED IN L6M

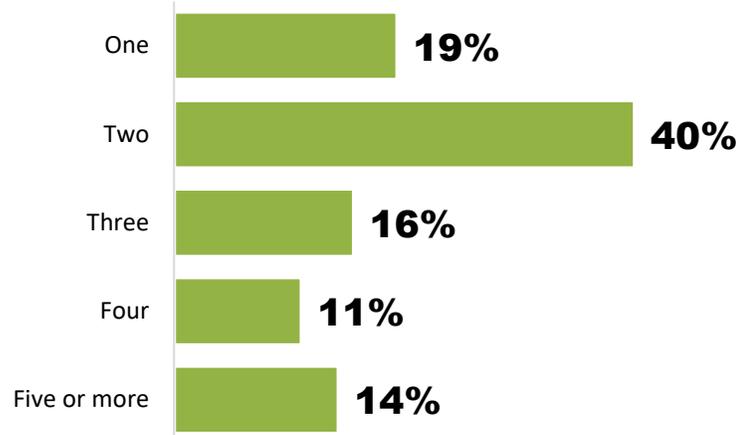
Purchase frequency



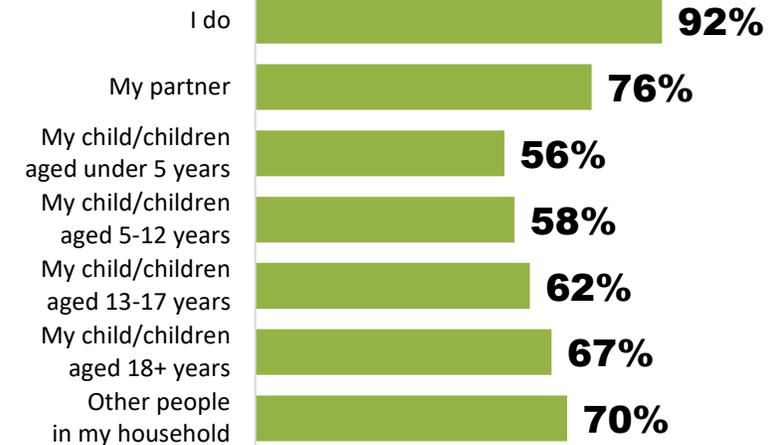
Planned/spontaneous purchase



Number of avocados typically purchased



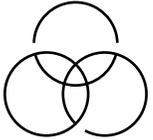
Avocado consumers in household



SECTION 4

AVOCADO CLAIMS

CLAIMS TESTING APPROACH



EVALUATE

WE EVALUATED CLAIMS BASED ON A
3-PRONGED FRAMEWORK



APPEAL

How much do they like the claim



UNIQUENESS

How different is the claim to other foods



CREDIBILITY

How believable is the claim



PRIORITISE

TO DETERMINE THE RELATIVE IMPORTANCE OF HEALTH CLAIMS, WE UTILISED A **MAXDIFF EXERCISE**

WHAT IS MAXDIFF AND HOW DO WE ASK IT?

MaxDiff is a simple trade-off technique that is used to rank a list of items, in this case health claims, by appeal. Respondents are presented with a series of small tasks where each task features a small list of items/factors (in this case, 5). Respondents are asked **'Which claim do you think is the MOST likely to encourage you to buy more Avocados, and which is LEAST likely to encourage you to buy more Avocados?'**

Repeating this process several times allows us to determine the derived importance of each of them. In this way, we avoid the bias where "everything is important" and we're able to understand the role of these factors that all ladder up to brand (which is a factor in the choice model).

We then analyse the results to determine which claim has the highest relative appeal – i.e. if we show all claims, what is the probability of each statement being selected as the 'best'. The sum of all claims equals 100%

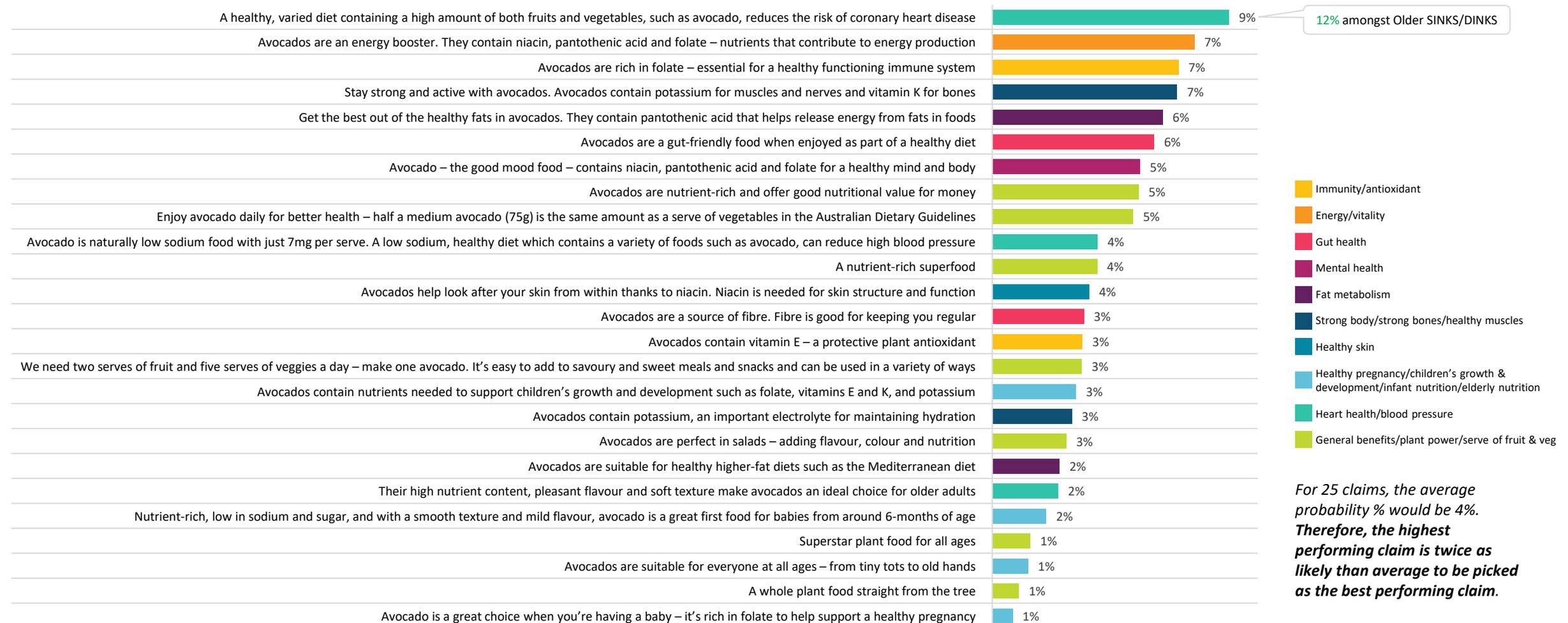


HEALTH CLAIMS SCORECARD – ALL AVOCADO PURCHASERS

CLAIM	MAXDIFF	APPEAL	CREDIBILITY	UNIQUENESS	RECOMMENDATION
AVERAGE CLAIM SCORE	4%	31%	43%	16%	
Stay strong and active with avocados. Avocados contain potassium for muscles and nerves and vitamin K for bones	7%	44%	43%	19%	PROCEED
Avocados are rich in folate – essential for a healthy functioning immune system	7%	41%	43%	19%	PROCEED
Avocados are an energy booster. They contain niacin, pantothenic acid and folate – nutrients that contribute to energy production	7%	42%	40%	19%	PROCEED
A healthy, varied diet containing a high amount of both fruits and vegetables, such as avocado, reduces the risk of coronary heart disease	9%	42%	49%	13%	CONSIDER
Enjoy avocado daily for better health – half a medium avocado (75g) is the same amount as a serve of vegetables in the Australian Dietary Guidelines	5%	37%	46%	19%	CONSIDER
Avocados are nutrient-rich and offer good nutritional value for money	5%	38%	44%	11%	CONSIDER
Avocados are a gut-friendly food when enjoyed as part of a healthy diet	6%	39%	45%	14%	CONSIDER
Avocado – the good mood food – contains niacin, pantothenic acid and folate for a healthy mind and body	5%	42%	39%	21%	CONSIDER
Get the best out of the healthy fats in avocados. They contain pantothenic acid that helps release energy from fats in foods	6%	36%	41%	24%	CONSIDER
Avocado is naturally low sodium food with just 7mg per serve. A low sodium, healthy diet which contains a variety of foods such as avocado, can reduce high blood pressure	4%	38%	47%	20%	CONSIDER
A nutrient-rich superfood	4%	38%	46%	20%	CONSIDER
Avocados contain vitamin E – a protective plant antioxidant	3%	31%	43%	16%	CONSIDER
Avocados help look after your skin from within thanks to niacin. Niacin is needed for skin structure and function	4%	38%	40%	20%	CONSIDER
Avocados are a source of fibre. Fibre is good for keeping you regular	3%	38%	53%	14%	CONSIDER
Avocados are perfect in salads – adding flavour, colour and nutrition	3%	32%	55%	11%	CONSIDER
A whole plant food straight from the tree	1%	15%	46%	14%	DE-PRIORITISE
Avocados are suitable for everyone at all ages – from tiny tots to old hands	1%	20%	46%	14%	DE-PRIORITISE
We need two serves of fruit and five serves of veggies a day – make one avocado. It's easy to add to savoury and sweet meals and snacks and can be used in a variety of ways	3%	27%	44%	13%	DE-PRIORITISE
Avocados contain nutrients needed to support children's growth and development such as folate, vitamins E and K, and potassium	3%	25%	39%	18%	DE-PRIORITISE
Superstar plant food for all ages	1%	23%	39%	16%	DE-PRIORITISE
Avocados contain potassium, an important electrolyte for maintaining hydration	3%	29%	39%	13%	DE-PRIORITISE
Avocados are suitable for healthy higher-fat diets such as the Mediterranean diet	2%	25%	41%	13%	DE-PRIORITISE
Nutrient-rich, low in sodium and sugar, and with a smooth texture and mild flavour, avocado is a great first food for babies from around 6-months of age	2%	18%	38%	15%	DE-PRIORITISE
Their high nutrient content, pleasant flavour and soft texture make avocados an ideal choice for older adults	2%	17%	39%	8%	DE-PRIORITISE
Avocado is a great choice when you're having a baby – it's rich in folate to help support a healthy pregnancy	1%	10%	33%	13%	DE-PRIORITISE

THE HEALTH CLAIM MOST LIKELY TO ENCOURAGE AVOCADO PURCHASE IS THE CLAIM ABOUT HEART HEALTH, FOLLOWED CLOSELY BY THE ENERGY/VITALITY CLAIM

MAXDIFF – PROBABILITY %



12% amongst Older SINKS/DINKS

- Immunity/antioxidant
- Energy/vitality
- Gut health
- Mental health
- Fat metabolism
- Strong body/strong bones/healthy muscles
- Healthy skin
- Healthy pregnancy/children's growth & development/infant nutrition/elderly nutrition
- Heart health/blood pressure
- General benefits/plant power/serve of fruit & veg

For 25 claims, the average probability % would be 4%. Therefore, the highest performing claim is twice as likely than average to be picked as the best performing claim.

THE MOST MOTIVATING CLAIMS ARE LARGELY CONSISTENT ACROSS LIFESTAGE, THE EXCEPTION BEING SUPPORTING CHILDREN'S GROWTH WHICH IS MUCH STRONGER AMONG YOUNG FAMILIES

MAXDIFF – PROBABILITY % (BY LIFESTAGE)

	Young SINKS/DINKS	Older SINKS/DINKS	Young Family	Older Family	Total
A healthy, varied diet containing a high amount of both fruits and vegetables, such as avocado, reduces the risk of coronary heart disease	8%	12%	6%	10%	9%
Avocados are an energy booster. They contain niacin, pantothenic acid and folate – nutrients that contribute to energy production	8%	7%	8%	8%	7%
Avocados are rich in folate – essential for a healthy functioning immune system	7%	6%	7%	7%	7%
Stay strong and active with avocados. Avocados contain potassium for muscles and nerves and vitamin K for bones	8%	7%	6%	7%	7%
Get the best out of the healthy fats in avocados. They contain pantothenic acid that helps release energy from fats in foods	7%	6%	5%	7%	6%
Avocados are a gut-friendly food when enjoyed as part of a healthy diet	5%	7%	5%	7%	6%
Avocado – the good mood food – contains niacin, pantothenic acid and folate for a healthy mind and body	6%	5%	5%	6%	5%
Avocados are nutrient-rich and offer good nutritional value for money	5%	6%	5%	5%	5%
Enjoy avocado daily for better health – half a medium avocado (75g) is the same amount as a serve of vegetables in the Australian Dietary Guidelines	5%	5%	6%	4%	5%
Avocado is naturally low sodium food with just 7mg per serve. A low sodium, healthy diet which contains a variety of foods such as avocado, can reduce high blood pressure	4%	4%	3%	4%	4%
A nutrient-rich superfood	4%	4%	3%	4%	4%
Avocados help look after your skin from within thanks to niacin. Niacin is needed for skin structure and function	4%	3%	4%	3%	4%
Avocados are a source of fibre. Fibre is good for keeping you regular	4%	3%	3%	3%	3%
Avocados contain vitamin E – a protective plant antioxidant	4%	3%	4%	3%	3%
We need two serves of fruit and five serves of veggies a day – make one avocado. It's easy to add to savoury and sweet meals and snacks and can be used in a variety of ways	3%	3%	3%	3%	3%
Avocados contain nutrients needed to support children's growth and development such as folate, vitamins E and K, and potassium	3%	2%	6%	3%	3%
Avocados contain potassium, an important electrolyte for maintaining hydration	3%	3%	3%	3%	3%
Avocados are perfect in salads – adding flavour, colour and nutrition	2%	3%	3%	2%	3%
Avocados are suitable for healthy higher-fat diets such as the Mediterranean diet	2%	3%	2%	2%	2%
Their high nutrient content, pleasant flavour and soft texture make avocados an ideal choice for older adults	2%	2%	2%	2%	2%
Nutrient-rich, low in sodium and sugar, and with a smooth texture and mild flavour, avocado is a great first food for babies from around 6-months of age	2%	1%	3%	2%	2%
Superstar plant food for all ages	1%	1%	1%	1%	1%
Avocados are suitable for everyone at all ages – from tiny tots to old hands	1%	1%	2%	1%	1%
A whole plant food straight from the tree	1%	1%	1%	1%	1%
Avocado is a great choice when you're having a baby – it's rich in folate to help support a healthy pregnancy	1%	0%	1%	1%	1%

THE STRONG BODY HEALTH CLAIM IS MOST APPEALING, ALTHOUGH OTHER CLAIMS ARE NOT FAR BEHIND

APPEAL OF CLAIMS



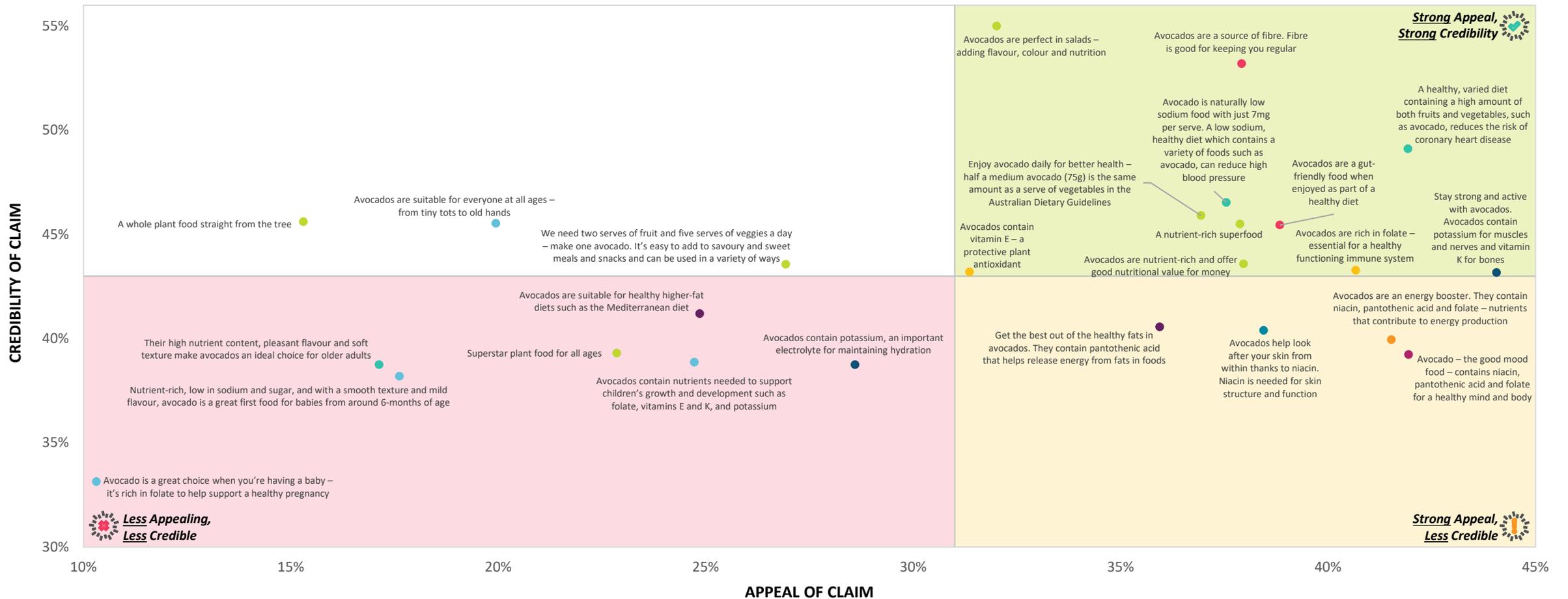
OVERALL, AT LEAST 2 IN 5 FIND MOST HEALTH CLAIMS CREDIBLE, WITH THE GENERAL BENEFITS/ PLANT POWER/SERVE OF FRUIT & VEG CLAIMS MAINLY BEING THE MORE BELIEVABLE CLAIMS

CREDIBILITY OF CLAIMS



IMMUNITY/ANTIOXIDANT AND GUT HEALTH CLAIMS ALL HAVE STRONG APPEAL AND CREDIBILITY. WHILE ENERGY/VITALITY AND MENTAL HEALTH CLAIMS HAVE STRONG APPEAL, THEY ARE LESS CREDIBLE, SUGGESTING THAT THESE CLAIMS WOULD NEED TO BE BACKED UP WITH MORE EVIDENCE IF THEY WERE TO BE USED

APPEAL OF CLAIMS X CREDIBILITY OF CLAIMS



FAT METABOLISM CLAIM IS THOUGHT TO BE THE MOST UNIQUE CLAIM, WITH A QUARTER THINKING THE HEALTHY FATS IN AVOCADO MAKES IT DIFFERENT FROM OTHER FOODS

UNIQUENESS OF CLAIMS



IMMUNITY/ANTIOXIDANT, ENERGY/VITALITY AND MENTAL HEALTH CLAIMS ALL HAVE STRONG APPEAL AND UNIQUENESS. WHILE GUT HEALTH CLAIMS HAVE STRONG CREDIBILITY, UNIQUENESS IS LOWER THAN AVERAGE

APPEAL OF CLAIMS X UNIQUENESS OF CLAIMS



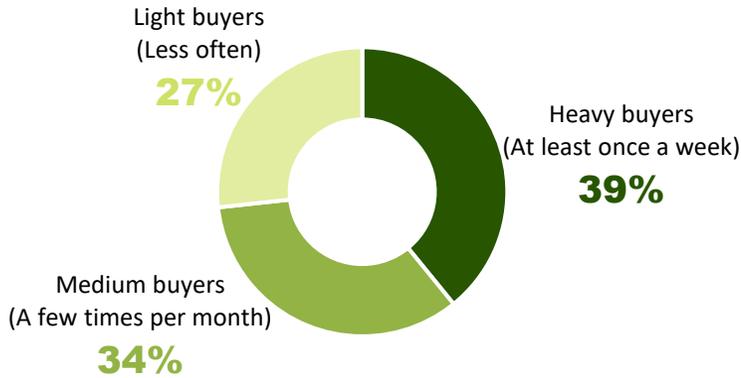
SECTION 5

DEEP DIVE INTO LIGHT BUYERS

LIGHT BUYERS TYPICALLY PURCHASE JUST ONE AVOCADO AND ARE MAINLY PROMPTED TO PURCHASE WHEN IT IS ON SALE, MAKING THEM MORE IMPULSIVE SHOPPERS



PURCHASE FREQUENCY



PLANNED/SPONTANEOUS PURCHASE



HEALTH CLAIMS

Compared to all avocado purchasers, there were **no significant differences** in how the 25 health claims resonated with this group of light buyers in terms of what would most/least likely encourage them to buy more avocados, appeal, credibility, and uniqueness of claims.



NUMBER OF AVOCADOS TYPICALLY PURCHASED



TOP 3 REASONS FOR PURCHASE

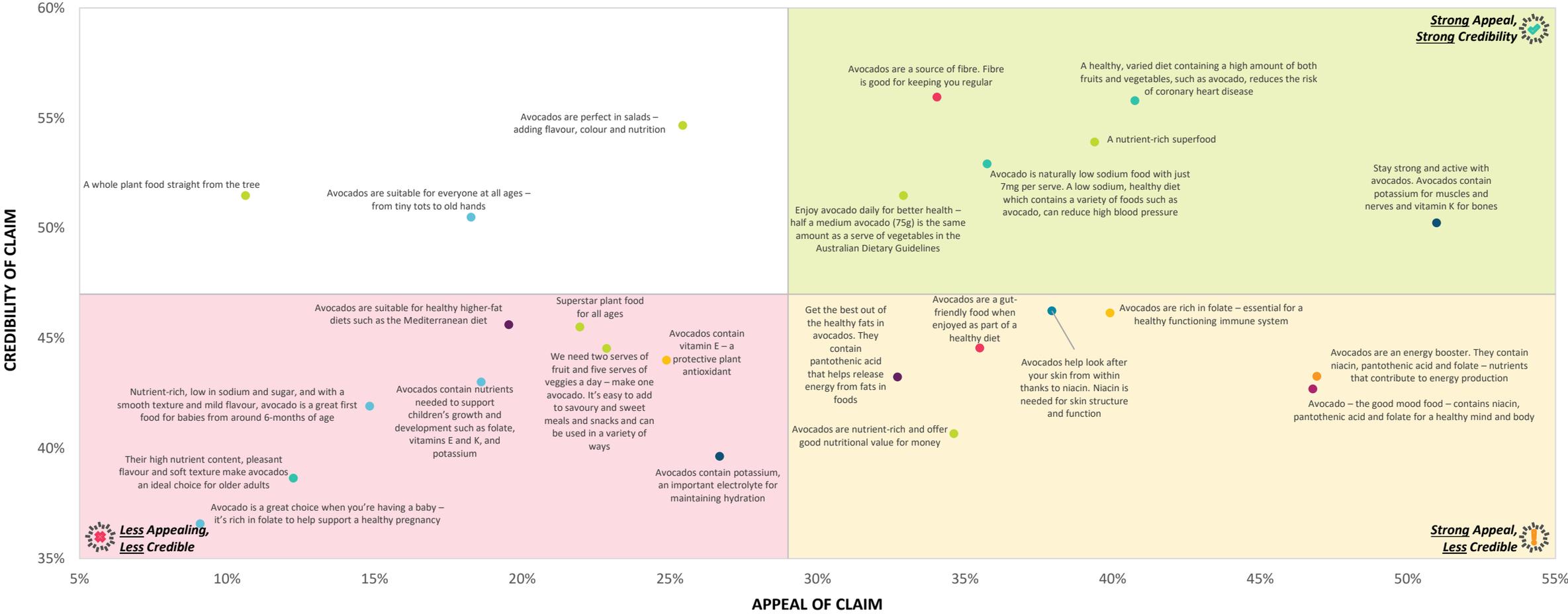


HEALTH CLAIMS SCORECARD – LIGHT BUYERS

CLAIM	MAXDIFF	APPEAL	CREDIBILITY	UNIQUENESS	RECOMMENDATION
AVERAGE CLAIM SCORE	4%	29%	47%	14%	
Stay strong and active with avocados. Avocados contain potassium for muscles and nerves and vitamin K for bones	8%	51%	50%	19%	PROCEED
Enjoy avocado daily for better health – half a medium avocado (75g) is the same amount as a serve of vegetables in the Australian Dietary Guidelines	5%	33%	51%	22%	PROCEED
Avocados are an energy booster. They contain niacin, pantothenic acid and folate – nutrients that contribute to energy production	8%	47%	43%	15%	PROCEED
A healthy, varied diet containing a high amount of both fruits and vegetables, such as avocado, reduces the risk of coronary heart disease	8%	41%	56%	11%	CONSIDER
Avocado – the good mood food – contains niacin, pantothenic acid and folate for a healthy mind and body	6%	47%	43%	21%	CONSIDER
Avocados are rich in folate – essential for a healthy functioning immune system	7%	40%	46%	16%	CONSIDER
Avocados help look after your skin from within thanks to niacin. Niacin is needed for skin structure and function	4%	38%	46%	18%	CONSIDER
A nutrient-rich superfood	4%	39%	54%	17%	CONSIDER
Get the best out of the healthy fats in avocados. They contain pantothenic acid that helps release energy from fats in foods	6%	33%	43%	21%	CONSIDER
Avocado is naturally low sodium food with just 7mg per serve. A low sodium, healthy diet which contains a variety of foods such as avocado, can reduce high blood pressure	4%	36%	53%	22%	CONSIDER
Avocados are a gut-friendly food when enjoyed as part of a healthy diet	6%	35%	45%	14%	DE-PRIORITISE
Avocados are nutrient-rich and offer good nutritional value for money	5%	35%	41%	9%	DE-PRIORITISE
Avocados are a source of fibre. Fibre is good for keeping you regular	3%	34%	56%	10%	DE-PRIORITISE
Avocados are suitable for everyone at all ages – from tiny tots to old hands	1%	18%	50%	15%	DE-PRIORITISE
Superstar plant food for all ages	1%	22%	46%	16%	DE-PRIORITISE
Avocados contain nutrients needed to support children's growth and development such as folate, vitamins E and K, and potassium	3%	19%	43%	18%	DE-PRIORITISE
Avocados are perfect in salads – adding flavour, colour and nutrition	2%	25%	55%	8%	DE-PRIORITISE
A whole plant food straight from the tree	1%	11%	51%	9%	DE-PRIORITISE
Avocados contain vitamin E – a protective plant antioxidant	3%	25%	44%	13%	DE-PRIORITISE
We need two serves of fruit and five serves of veggies a day – make one avocado. It's easy to add to savoury and sweet meals and snacks and can be used in a variety of ways	3%	23%	45%	13%	DE-PRIORITISE
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Avocados are suitable for healthy higher-fat diets such as the Mediterranean diet	2%	20%	46%	11%	DE-PRIORITISE
Nutrient-rich, low in sodium and sugar, and with a smooth texture and mild flavour, avocado is a great first food for babies from around 6-months of age	2%	15%	42%	10%	DE-PRIORITISE
Their high nutrient content, pleasant flavour and soft texture make avocados an ideal choice for older adults	2%	12%	39%	6%	DE-PRIORITISE
Avocado is a great choice when you're having a baby – it's rich in folate to help support a healthy pregnancy	1%	9%	37%	9%	DE-PRIORITISE

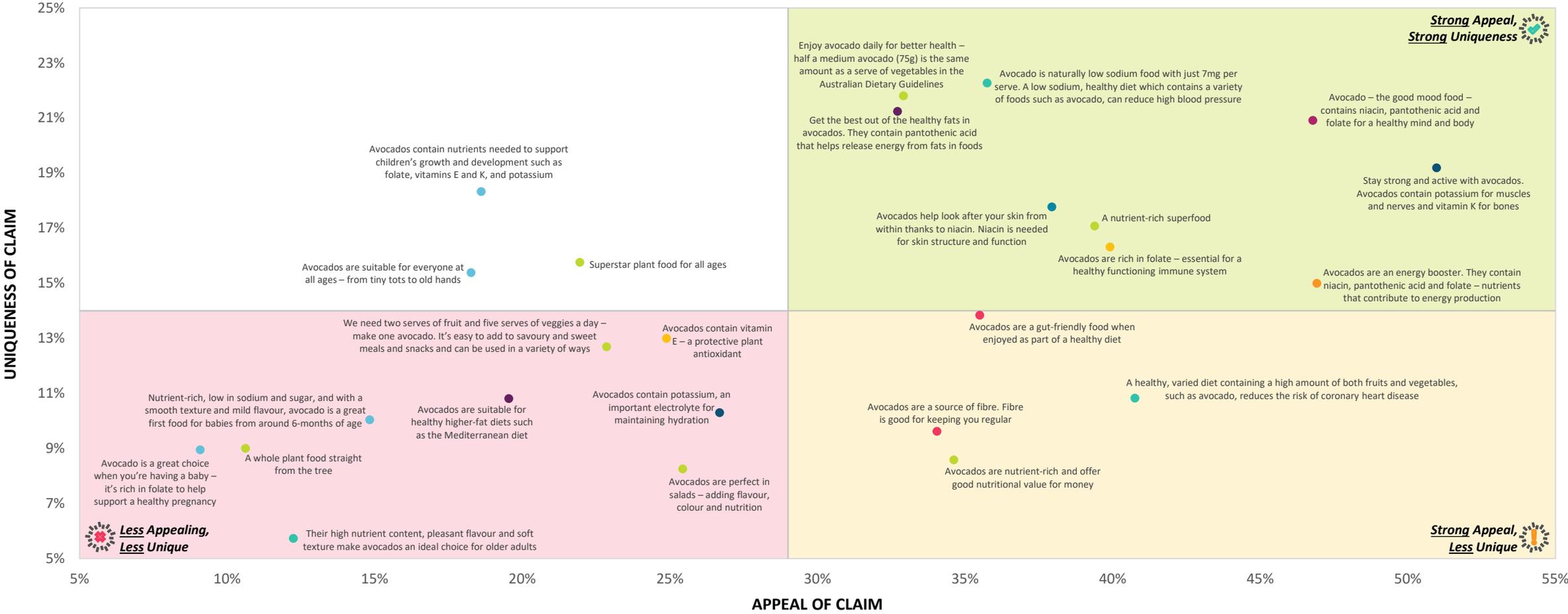
COMPARED TO ALL AVOCADO PURCHASERS, LIGHT BUYERS FIND FEWER HEALTH CLAIMS TO HAVE STRONG APPEAL AND CREDIBILITY. SIMILARLY, ENERGY/VITALITY AND MENTAL HEALTH CLAIMS ALSO HAVE STRONG APPEAL, ALTHOUGH CREDIBILITY IS LOWER THAN AVERAGE

APPEAL OF CLAIMS X CREDIBILITY OF CLAIMS – AMONGST LIGHT BUYERS



MENTAL HEALTH AND HEALTHY SKIN CLAIMS HAVE STRONG APPEAL AND UNIQUENESS. GUT HEALTH CLAIMS HAVE HIGHER THAN AVERAGE APPEAL, BUT ARE THOUGHT TO BE LESS UNIQUE CLAIMS

APPEAL OF CLAIMS X UNIQUENESS OF CLAIMS – AMONGST LIGHT BUYERS





Singapore
Raffles City Tower,
250 North Bridge Road
Singapore 179101

New Zealand
Level 5, 131 Queen Street
Auckland 1010

Canberra
Level 2, 1-7 Neptune Street
Woden ACT 2606

Melbourne
Level 5, 161 Collins Street
VIC 3000

Sydney
International House,
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