Why Handhelds Are

A KEY OPPORTUNITY TO INCREASING **AVOCADO CONSUMPTION**

Flavor is the main reason consumers add avocados or guacamole to their handheld products, but craveability, health, and nutrition also play a role.

BURRITO FACTS

48% OF CONSUMERS prefer guacamole to avocado on their burritos, with 63% of guacamole likers ordering guacamole every or nearly every time they order a burrito.1

Guacamole is the fifth most popular burrito topping, with avocado coming in slightly lower. Add-on costs may be the reason for lower use. **Burrito topping preferences:**¹



Guacamole with some chunks

Chunky guacamole

Cut/sliced avocado

Cheese Salsa Sour cream

Tomatoes GUACAMOLE Hot sauce Lettuce **Onions AVOCADO** Bacon Hot/pickled peppers:

48% 42% 41% 38% 38% 37% 24%

38%

32%

33%

62%

55%

51%

Avocado dressing 27% Smooth guacamole Diced avocado 31% Avocado smash 27%

Consumers are generally interested in having some form of avocado or guacamole in their burritos. Interest is higher across all concepts for those who enjoy avocados and guacamole.¹

Avocado add-on behavior for burritos:1

Avocado aioli 20% Avocado relish 16% Pickled avocado 14% Avocado schmear Avocado add-on frequency for burritos:1 38% of consumers will add of consumers will add avocado every or guacamole every or nearly every time nearly every time

Reasons consumers add Reasons consumers add avocado to burritos (avocado likers):1 guacamole to burritos (guacamole likers):1

Flavor is the top reason consumers add avocado and guacamole to their burritos, with various health reasons also being drivers to add-ons.

Freshly prepared: 31% Filling option: 30% Makes my meal healthier: 30% Good for heart health: 28%

Adds flavor: 52%

Craveable option: 36%

Nutritious option: 36%

Contains good fats: 34%

Filling option: 30% Makes my meal healthier: 30% Good for heart health: 28%

Adds flavor: 51%

Craveable option: 37%

Nutritious option: 35%

Freshly prepared: 30%

Contains good fats: 34%

simply want cut or sliced avocado on their burger. Almost a 25% OF YOUNGER CONSUMERS report being interested in trying avocado dressing, smooth guacamole, guacamole with some chunks, and avocado smash on their burgers.1 Avocado add-on behavior for burgers:1 25%

19%

19%

18%

17%

25%

19%

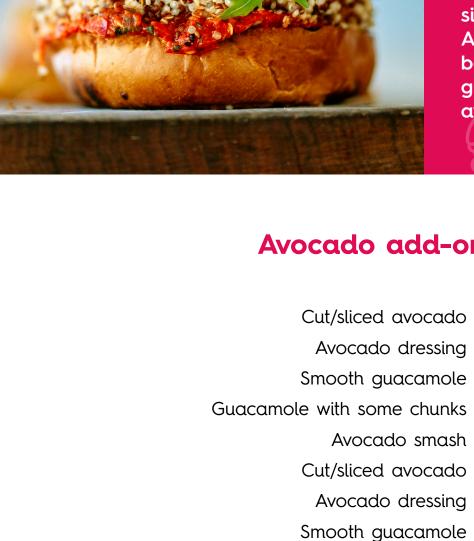
19%

18%

17%

Avocado and guacamole are not regular burger toppings for consumers. According to Ignite Menu, **9%** of operators offer burgers with avocado, and

Of those who are interested, 25% OF CONSUMERS



Adds flavor: 56%

Unique: 28%

Treat/reward: 23%

Nutritious option: 33%

Craveable option: 31%

Contains good fats: 31%

Guacamole with some chunks Avocado smash

BURGER FACTS

3% offer burgers with guacamole.1

17% of consumer 18% of consumers will add of consumers will add avocado every or guacamole every or nearly every time nearly every time Aside from adding flavor, health and craveability also play a main role in consumers adding avocado and guacamole to their burgers. Reasons consumers add Reasons consumers add guacamole to burgers: (guacamole likers):1 avocado to burgers (avocado likers):1

Adds flavor: 57%

Unique: 29%

18-34 indicate typical add-ons of avocado.1

pickled dressing, and avocado dressing.¹

Consumers are likely to try different avocado concepts

on their hot dogs, such as avocado relish, avocado smash,

24%

20%

20%

15%

19%

19%

19%

16%

of consumers will add

guacamole every or

guacamole to hot dogs (guacamole likers):1

56%

56%

55%

52%

49%

36%

36%

35%

34%

18%

13%

30%

30%

32%

30%

30%

29%

14%

of consumers will add

guacamole every or

guacamole to tacos (guacamole likers):1

nearly every time

Reasons consumers add

Nutritious option: 30%

Craveable option: 33%

Freshly prepared: 22%

Contains good fats: 26%

Good for heart health: 26%

51%

51%

44%

43%

42%

35%

35%

28%

25%

Adds flavor: 54%

nearly every time

28%

Reasons consumers add

Treat/reward: 24%

Nutritious option: 32%

Craveable option: 32%

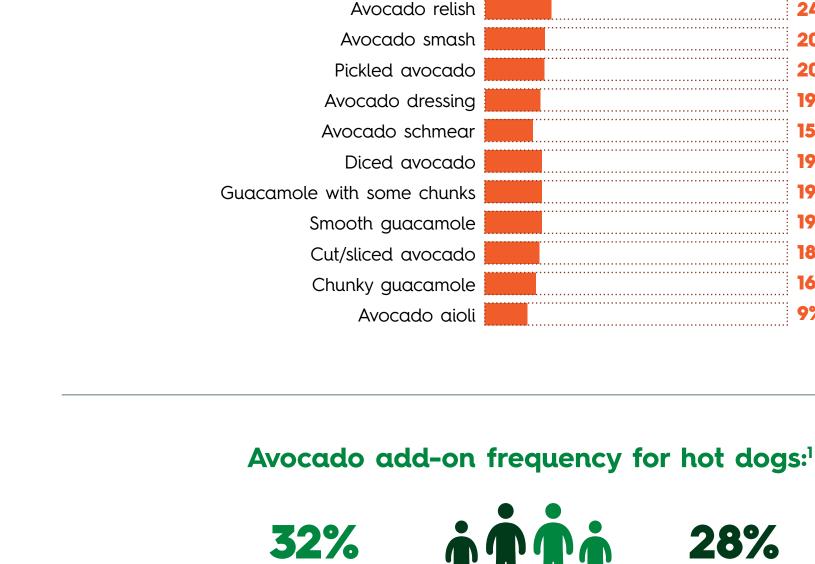
Contains good fats: 32%

Avocado add-on frequency for burgers:1

Mustard, ketchup, and onions are the most typical hot dog add-ons. Avocado and guacamole appear further down the list, although 26%, OF CONSUMERS AGED

Avocado add-on behavior for hot dogs:1

HOT DOG FACTS



of consumers will add

Reasons consumers add

avocado every or

nearly every time

avocado to hot dogs (avocado likers):

Adds flavor: 39% Adds flavor: 43% **Unique: 33%** Unique: 29% Treat/reward: 32% Treat/reward: 29% Good value for money: 29% Good value for money: 29% Craveable option: 26% Craveable option: 31% Freshly prepared: 33% Freshly prepared: 24% Nutritious option: 26% Nutritious option: 30% **TACO FACTS** Half of consumers report ADDING GUACAMOLE (56%) AND AVOCADO (50%) to their tacos at least half the time.1

Both guacamole and avocado fall into the TOP 10 TOPPINGS consumers typically add on to tacos.1

Cheese

Salsa

greens

Onions

Sour cream

Tomatoes

Lettuce/salad

GUACAMOLE

Hot sauce

AVOCADO

Hot/Pickled

Familiar forms of avocado and guacamole take the lead for taco additions. Younger consumers

Avocado add-on frequency for tacos:1

show a greater preference for guacamole with some chunks, while older consumers are more

Bacon

peppers

Taco topping preferences:1

Hot dog consumers are *primarily driven by flavor* in their decisions to add avocado and guacamole, with health also emerging as a key factor.

open to cut, sliced, and diced avocado.¹ Avocado add-on behavior for tacos:1 Cut/sliced avocado Chunky guacamole Smooth guacamole Cut/sliced avocado Chunky guacamole Smooth guacamole Diced avocado

Avocado relish

Pickled avocado

Avocado schmear

30%

of consumers will add

avocado every or

nearly every time

Makes tacos healthier: 23% **Unique: 21% SANDWICH FACTS** 51% OF CONSUMERS AGED 18-34 add avocado to their sandwich every or nearly every time, and 41% add guacamole at the same frequency. OVER 2/5 OF CONSUMERS report typical additions of lettuce/salad greens, tomatoes, and onions. Avocados see an increase of 33 percentage points among avocado likers, the highest lift across all Topping preferences for sandwiches/wraps:1 Lettuce Cheese

Tomatoes

Mayo/Aioli

AVOCADO

GUACAMOLE

Mustard

Onions

Bacon

Both avocados and guacamole appeal primarily in tacos for their flavor, but their *health benefits also impact* consumers. Reasons consumers add avocado to tacos (avocado likers):1 Adds flavor: 55% Nutritious option: 36% Craveable option: 31% Contains good fats: 33% Good for heart health: 29% Freshly prepared: 29% Makes tacos healthier: 26% Unique: 22%

key handheld categories.1

while men are more likely to express interest in PICKLED AVOCADO (15%).1 All avocado and guacamole sandwich concepts see a considerable rise in interest among both groups of likers, but cut/sliced avocado particularly stands out.1 Avocado add-on behavior for sandwiches:1

38%

29%

27%

26%

23%

19%

21%

16%

14%

11%

Smooth guacamole Avocado schmear Avocado relish Pickled avocado

avocado every or nearly every time Flavor and nutrition emerge as top reasons to add avocado and guacamole to sandwiches, as healthier alternatives to traditional toppings such as mayonnaise or cheese.1



nearly every time

of consumers will add

guacamole every or

30%

Reasons consumers add guacamole to sandwiches

Good for heart health: 26%

Craveable option: 28%

Freshly prepared: 23%

Filling option: 26%

Makes sandwich healthier: 26%

Younger consumers are considerably more interested in avocado smash compared to their older counterparts for sandwich concepts.1 For sandwich concepts, CUT/SLICED AVOCADO (46%), DICED AVOCADO (33%), and GUACAMOLE WITH SOME CHUNKS (31%) all skew higher among women,

Cut or sliced avocado leads overall as a sandwich add-on, and there is

also great interest for avocado dressing and chunky guacamole.1

Add-on demographics:

Guacamole with some chunks Avocado smash Avocado aioli

Cut/sliced avocado

Avocado dressing

Chunky guacamole

Avocado add-on frequency for sandwiches:1 of consumers will add

Adds flavor: 45% Nutritious option: 32%

(guacamole likers):1 Contains good fats: 30%

Source: 1. AFM Handheld Research Study, July 2020.

Craveable option: 28% Freshly prepared: 28% Filling option: 22%

Makes sandwich healthier: 30%

avocado to sandwiches (avocado likers):1

Reasons consumers add

Adds flavor: 48%

Good for heart health: 33%

Nutritious option: 37% Contains good fats: 37%