



2017 Consumer Usage & Attitude of Mangos in the United States

The Big Picture

For the past decade, consumption of fresh mangos has increased at a steady rate in the U.S. market. As mango consumption increases and mangos become more familiar to U.S. consumers, the National Mango Board (NMB) relies on the results of consumer research like the 2017 Attitudes and Usage Study (A&U) to adjust the marketing strategy to better drive and meet consumer demand.

There have been four A&U studies conducted by the NMB since its inception:



The 2017 Attitudes and Usage study was designed to build on the work done in 2013 and to meet the following objectives: 1) continue to track levels of mango awareness and usage, 2) more deeply understand perceptions of mangos and 3) identify and explore beliefs and behaviors that impact purchase intent and decision making.

This survey was conducted online, by FleishmanHillard on behalf of the National Mango Board. A total of 1,300 consumers aged 18 to 69 were interviewed nationwide, including:

- 1,000 Americans aged 18 to 69, regardless of mango purchasing behavior.
- An oversample of 300 Americans aged 18 to 69 who had purchased fresh mango in the past two weeks at the time of their interview.

The survey sample identified those who have purchased mangos vs those who had never purchased a mango. Among those who had purchased a mango, the survey identified current mango purchasers (past 6 months) vs past mango purchasers (greater than 6 months) as well as a better understanding of recent purchasers (past 2 weeks).

2017 A&U Key Findings:

The percentage of mango purchasers has increased from 60% in 2013 to 67% in 2017. Likewise, the percentage of consumers who have never purchased a mango fell from 40% to 33%. This is a positive sign that mangos are increasing in popularity with fewer consumers unaware of mangos or rejecting the purchase of a mango.

- **Reasons for purchasing or not purchasing mango have remained largely consistent, but in remaining consistent, show several positive trends:**
 - Purchasers continue to buy mangos for the flavor and because they are perceived as healthy. Ratings on these traits among all respondents have remained steady or increased, suggesting that mangos positives have grown.



- The top two reasons that non-purchasers do not buy mango remain the same, but they have swapped position. In 2013, the leading reason for not buying a mango was not thinking about them (35%); this year that same reason is second at 29%. In 2017, the leading reason is not knowing how to select a ripe mango (31%).
- Among past purchasers, not thinking about mangos is the second leading reason for not purchasing them at 30% (2013: 28%), while confusion about the season is first (34%, unchanged from 2013).
- **Over half of mango purchases are unplanned, including among current purchasers.**
- Taken together with the growth in purchasing since 2013, these trends mean that no new issues have arisen that prevent purchasing, while the barriers that past and non-purchasers cite are eroding. Fewer non-purchasers are overlooking mango, an indication that mango share-of-mind is slowly growing, and though they remain leading reasons for not buying a mango, these issues clearly have not stopped the growth in purchasing, meaning fewer consumers are succumbing to them.
- **It is not a dislike of mangos that keeps people from trying fresh, whole mangos. They are simply overlooked and some are still intimidated by them.**
 - The leading reasons people do not purchase mangos are that they don't know how to pick one or just don't think about them.
 - **Just 12% of consumers and 17% of purchasers know that mangos are in season year-round.** Among past purchasers, 34% say mangos not being in season is why they haven't bought one in the past six months.
 - 78% of non-purchasers don't know how to select a ripe mango.
 - **Many past and non-purchasers are eating mango products, including from restaurants, but they are not eating whole, fresh mango.**
- **Most of the growth in current purchasers has been concentrated in fresh, sliced mango.**
 - This may be due to a shifting preference or increased availability of this item in grocery stores over the past several years. However, sales of whole mango still exceed sale of sliced mango by a wide margin. This indicates that some of the growth in total purchasing has come at the expense of whole fruit, but many of these new purchasers are buying both products.
- **Purchase intent is up among both current and past purchasers for sliced mango and among past and non-purchasers for whole mango.**
- **While mangos are mostly eaten at home (including a friend's or relatives house), the ways and places in which consumers eat mango have shifted somewhat,**



with more mango being eaten as part of a dish and increasingly outside the home. This indicates that total mango consumption could be rising.

- The more frequent use of mango as an ingredient may be behind the greater purchase intensity observed in 2017 among recent purchasers, who on average bought 5.6 mangos in the past two weeks (compared to 4.9 in 2013), though the seasonality impact of the survey field periods cannot be wholly dismissed.
- Purchasers themselves remain the biggest consumers of mangos. Consumption by children and teens is disappointingly low – even among parents, children are less likely than the parents themselves to eat mango.
- **A significant portion of survey respondents expressed increased purchase intent at the end of the survey.**
 - However, these shifters did not respond to any one image or message in an especially unique way.
 - They showed more differentiation on having a mango sample and knowing how to cut one compared to respondents overall.
 - This suggests that increasing purchasing intent is less a matter of a single message than empowering consumers with information, beginning with reminding them that mangos are an option year-round.

2017 A&U Implications as we look ahead:

These findings were both a confirmation that the NMB should continue to drive certain key messages while suggesting that additional development is needed.

Continue to reinforce through consumer education and inspiration:

- Mangos are a versatile fruit to be eaten whole as well as in recipes
- Mangos are in season year-round
- How to select a mango
- How to cut a mango

Further develop ways of communicating the following:

- Mangos' unique flavor profile as it is the primary motivator for purchase
- Mangos' nutrition and health benefits as the payoff

A strategic combination of flavor plus nutrition messaging can be used as leverage to get non-purchasers to their first purchase and existing purchasers to increase their purchase intensity.



In analyzing past and recent consumer research, it is clear that the NMB has put in place the key elements of consumer education with the right messaging consistently over the years and further enhanced in recent months. However, there is opportunity to amplify key messages in new and compelling ways to keep mango top-of-mind for consumers more often throughout the year. **In order to drive even greater growth and accelerate consumption, additional qualitative exploration of core consumers is needed to prioritize consumer segments and identify new, compelling messages that will motivate increased consumption of fresh mangos.**