2013 Consumers' Attitudes and Usage of Mangos

The Big Picture:

While a variety of factors continue to influence consumers' decisions to buy mangos, from appearance to price to product quality, consumer education rises to the forefront. As such, the National Mango Board (NMB) focuses their marketing strategy around arming the consumer with information centering on how to pick a ripe mango and how to slice them.

The NMB conducted a consumer "attitude and usage" telephone survey back in 2007 to gather initial consumer input about mangos. Four years later (in 2011), the Board directed a similar study online to determine how consumers' attitudes and purchasing patterns had evolved. In 2013, the Board directed another wave of the tracking study, hiring *rose research*, to update findings from the two previous studies, while also investigating other areas such as food safety and quality issues experienced (if any) with mangos. The overall goal was to measure consumer awareness and usage practices as they relate to mangos, and importantly, determine the extent to which shifts have taken place over time.

Survey participants included three groups of U.S. residents: 1) Current purchasers – people who had purchased mangos within the past six months; 2) Past purchasers – people who had purchased mangos before but did not buy them in the past six months; and 3) Non-purchasers – people who had never purchased mangos. That sample was a nationally representative group of 1,003 people (70% female and 30% male) who were the primary grocery shopper in their household – ranging in age from 21-69 years old. In addition to tracking and updating who the mango consumers are, why they buy the fruit, and what might encourage future purchases, the study also investigated health awareness and health perceptions toward mangos. The study also expanded on consumer awareness, behavior, knowledge and understanding of mangos in conjunction with how they fit into today's lifestyle. Armed with these findings, the mango industry can move forward its education outreach regarding mango selection, ripening, cutting, and usage by targeting its marketing efforts toward specific populations that will drive mango sales and increase purchasing frequency.

Overall Findings:

Demand for mangos continues to be strong, as virtually all of the current purchasers plan to continue to buy them (2013 – 98% vs. 2011 – 97%). However, results show that significantly fewer past purchasers compared to 2011 expect to buy mangos in the future (2013 – 77% vs. 2011 – 92%).
The percentage of current purchasers remains significantly higher than 2007 findings and is on par with 2011 data (2013 – 45% vs. 2011 – 46% and 2007 – 35%).

- **Future purchase intent is very strong for "ripe and ready" mangos during the fall and winter months among current buyers.** More than 8 in 10 are in the top-2 box[1] (definitely/probably would purchase mangos if they were "ripe and ready" – 81%), while nearly half of the past purchasers also expressed interest (definitely/probably would purchase mangos if they were "ripe and ready" – 48%).

[1] Top-two-box scores include responses to the two most favorable response options.

About 81% of current purchasers definitely/probably would purchase mangos if they were "ripe and ready". While nearly half (48%) of past purchasers also expressed the same interest.

- The norm for purchase intent is 50-60% top-2 box[2], and with current purchasers exceeding the goal and past buyers approaching that mark, **it is a strong sign that "ripe and ready" mango buying during this timeframe has the potential to grow significantly.**

- **The key purchase drivers in the mango category revolve around "availability" and the "desire for more information".** In fact, other than "price" (i.e. less expensive mangos would motivate higher sales),consumers shared that mangos "being available where they usually shop for groceries" would encourage them to buy more, while "better quality" mangos were also high on the list.

- **Among current purchasers, incidence of buying fresh cut mangos increased from 33% in 2011 to 40% in 2013**, while whole mango purchasing remained static at 96%.
  - In addition, the margin between purchasing whole or fresh cut mangos in the past 6 months has narrowed. Among current purchasers, 87% indicated that they'll purchase a whole mango in the next 6 months compared to 57% who mentioned they plan on buying fresh cut in the same timeframe (vs. 2011 – 91% current and 52% sliced).

- **There remains a significant growth opportunity for mangos among non-purchasers**, as 40% of the 1,003 respondents have NEVER purchased mangos (compared to 2011 – 41% and 2007 – 46%).

- **Reasons for non-purchase were reported at significantly lower levels compared to 2011 data**. As such, simply "not thinking about them" (2013 – 35% vs. 2011 – 46%) and lack of education, specifically, "don't know how to pick ripe ones" (2013 – 27% vs. 2011 – 42%) and "don't know what to do with it" (2013 – 21% vs. 2011 – 32%) were the primary reasons for never purchasing mangos.

- **Seasonality continues to have a dramatic effect on mango sales.** Purchasing is much higher in the spring and summer than in the fall and winter (consistent in 2007, 2011 and 2013).
  - Among current purchasers, 97% indicated that they bought mangos from March through August, while only 65% said they purchased mangos from September through February (however, higher than 2011 – 59%), **with Hispanics buying even more frequently during the fall/winter.**
  - **In addition, mango purchase frequency has also climbed (compared to 2011) among current purchasers.** About three-quarters (73%) are buying mangos at least once every 2 or 3 weeks in the spring/summer (vs. 62% in 2011) and 54% in the fall/winter (vs. 43% in 2011).

- **People who have mangos top-of-mind are more likely to put mangos on their shopping list.**

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[2] Top-two-box scores include responses to the two most favorable response options.

- Current mango purchasers are more than twice as likely to put mangos on their shopping list vs. past purchasers.
- In addition, current purchasers are significantly less likely to report buying mangos on impulse compared to 2011 (2013 – 37% vs. 2011 – 50%), while nearly half of 2011 past purchasers said they buy mangos on impulse (2013 – 51% vs. 2011 – 58%).

- **Respondents have a favorable attitude when it comes to different types of mangos – which reinforces strong potential for future mango purchasing.**
  - **Interest in organic mangos continues to gain traction** among current/past purchasers, as well as non-purchasers. It has nearly doubled compared to 2007 (2013 – 30% vs. 2011 – 24% and 2007 – 16%) with most of the gains coming from men (2013 – 33% vs. 2011 – 19%) and shoppers 21-29 years of age (2013 – 41% vs. 2011 – 30%).
  - **In addition, sustainably grown mangos also have promise** – as more than half of the current mango buyers expressed interest (51%), while past buyers and non-buyers are less interested (30% and 20% respectively).

- **At least three-quarters of the respondents agreed that mangos are "tropical" (83%), "like their flavor" (2013 – 82% vs. 2011 – 81%) and "healthy and nutritious" (2013 – 75% vs. 2011 – 81%), while about half viewed them as a "special treat" (2013 – 47% vs. 2011 – 57%).**
  - Notably, about one-quarter of the respondents agreed that mangos are "difficult to slice" – in line with 2011 (2013 – 28% vs. 2011 – 26%).

- **Satisfaction with the quality of mangos was significantly lower in 2013 (2013- 47% vs. 2011- 63%). Also, significantly more consumers have reported being disappointed with the quality of a mango (2013 – 51% vs. 2011 – 42%) especially current purchasers (2013 – 52% vs. 39%) and Caucasians (2013 – 54% vs. African Americans – 39%).**
  - "Not ripe enough" and "lacks flavor/taste" were the primary reasons for disappointment with mango quality, followed by 3 in 10 who mentioned – "too ripe", "not sweet" (driven by African Americans), "poor texture" and "not juicy".
  - Past purchasers were higher than current buyers (as well as in 2011 data) in terms of having complaints about "not being ripe enough" – which again points to the need for better education (i.e., how to pick a mango) or pushing the fresh cut alternative (which is ready for immediate consumption).

- **More than half of the respondents reported that being "soft to the touch" is the primary way they determine if a mango is ripe**, followed by 4 in 10 who "smell it", with about one-quarter who mentioned "by the texture of the skin" and "if it is red in color" similar to levels seen in 2011.

- **In line with levels seen in 2007; however, different than the findings in 2011, mangos are primarily eaten "at home"** (2013 – 78% vs. 2011 – 53% and 2007 – 78%) and "by themselves" (either as a snack, breakfast or dessert) (2013 – 55% vs. 2011 – 43% and 2007 – 56%).

- **Virtually all of the health benefits exposed to the consumers were considered to be important when purchasing mangos –** especially being “high in Vitamin C”, “having more than 20 vitamins and minerals” and “being a good source of fiber” – while being a “good source of copper” is least important.
  - When derived importance is calculated, “vitamins”, specifically “A”, “C” and “B6” are the attributes that consumers consider to be most important when purchasing mangos (whole and fresh cut).

- **In addition, vitamin C (which plays an important role in immune function), vitamin A (which is critical for vision), fiber (which aids digestion) and vitamin B6 (which helps maintain nerve function) would positively impact consumer’s decision to buy mangos –** at least 7 in 10 of the respondents reported these attitudes.

- **Purchasers (current and past), younger respondents (21-44 years old), Hispanics and African Americans would be even more apt to purchase mangos in the future if they knew they had a positive impact on diabetes, cancer and obesity.**
  - Notably, younger respondents (21-44 years old) would also purchase more mangos if they had a positive impact on obesity, while older consumers, (55-69 years old) Hispanics and African Americans would buy more if they helped with diabetes.

Looking ahead:
Overall, the research indicates that if these key areas are addressed – “providing more information/education about mangos” and “keeping mangos in front of the consumers at POS,” mango sales would increase. The need for “education” is most apparent by the consumers’ own admission that they don’t “know how to choose a mango”. Moreover, the inability to select a “good” mango is possibly correlated to mango quality issues. Strategies/communications designed to provide consumers with the knowledge required to choose and cut a mango continue to hold promise in increasing mango consumption. Keeping mangos “top of mind” and making them appealing to the receptive demographic includes the promotion of health benefits and easy applications of mango in everyday opportunities.

All in all, a marketing plan that places emphasis on “education” and “presence in the stores” will increase the consumption of mangos.