

NATIONAL MANGO BOARD

August 18, 2020



*Webinar*

## **BREAKING POINT OR PIVOT POINT?**

HOW A MICROSCOPIC MENACE  
IGNITED  
MONUMENTAL MARKETING  
CHANGES

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# Manuel Michel

Executive Director

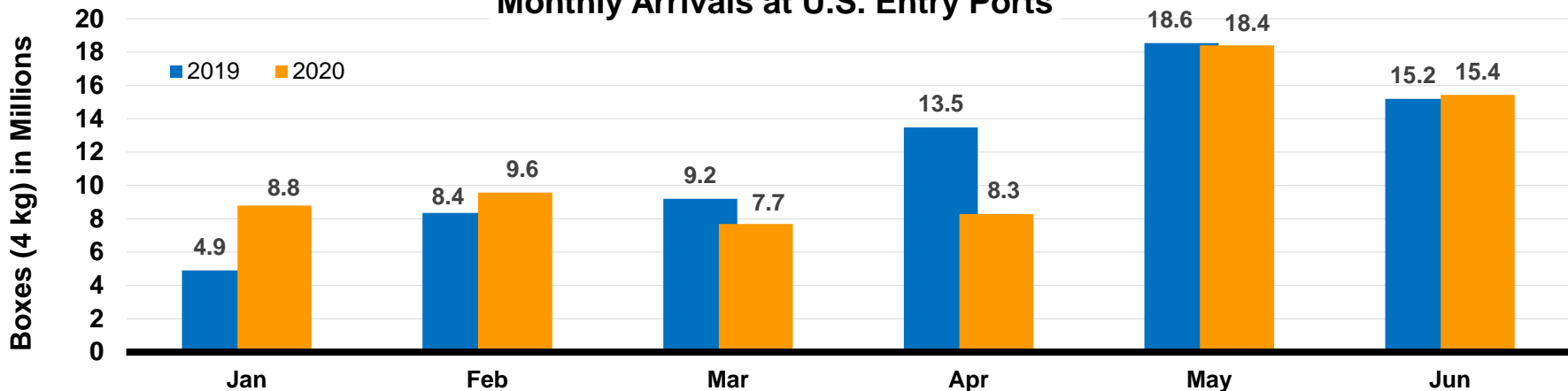
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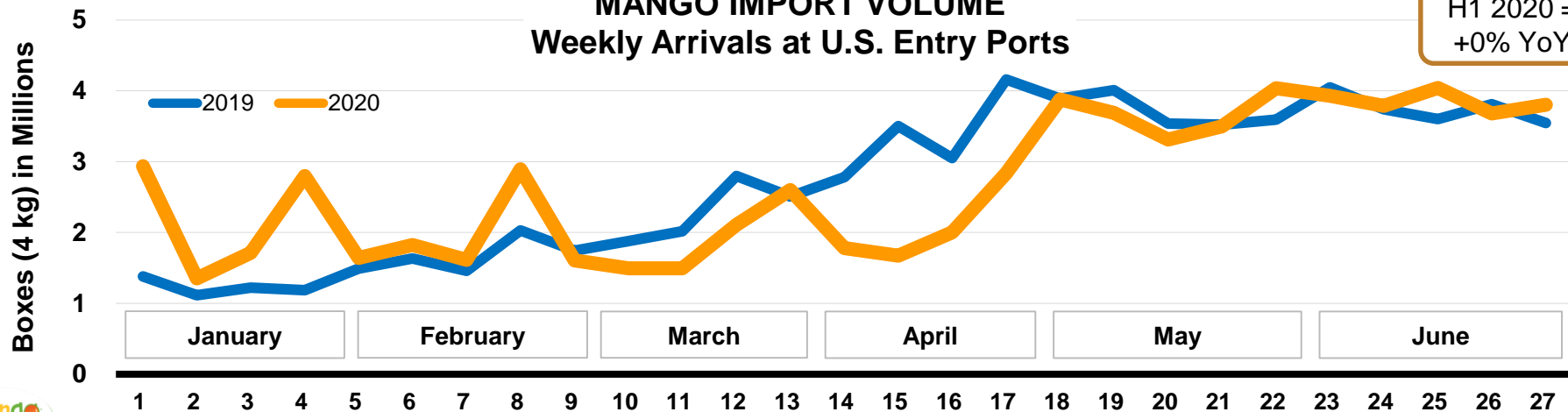
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## MANGO IMPORT VOLUME Monthly Arrivals at U.S. Entry Ports



## MANGO IMPORT VOLUME Weekly Arrivals at U.S. Entry Ports

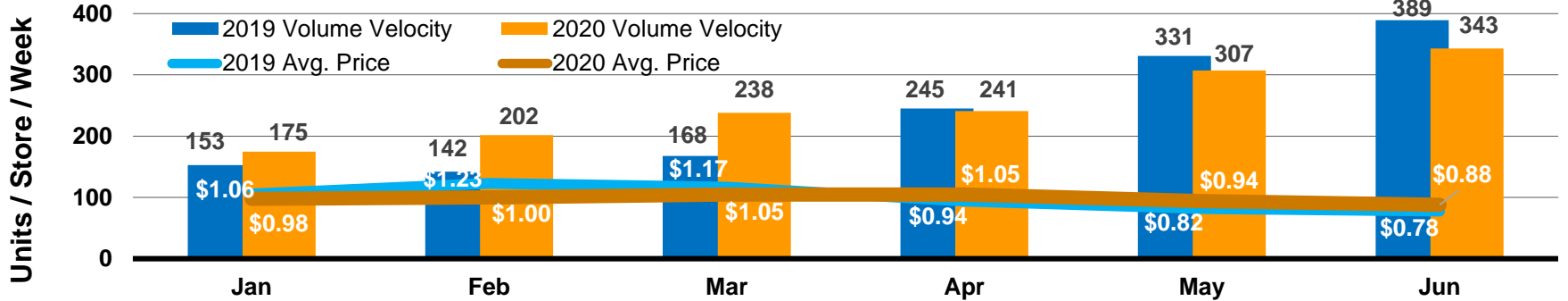


H1 2020 =  
+0% YoY



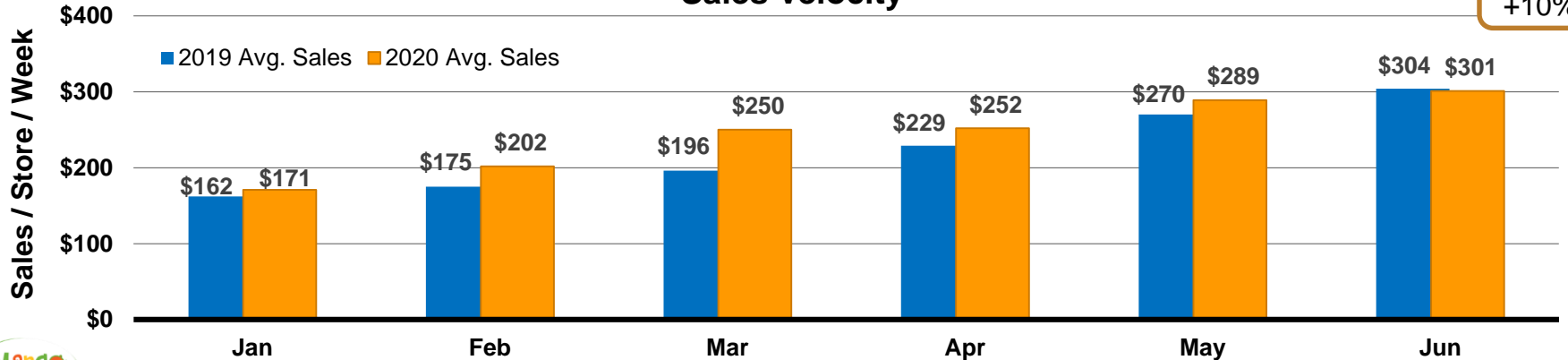
## WHOLE MANGO AT RETAIL Volume Velocity and Avg. Price

H1 2020 =  
+5% YOY

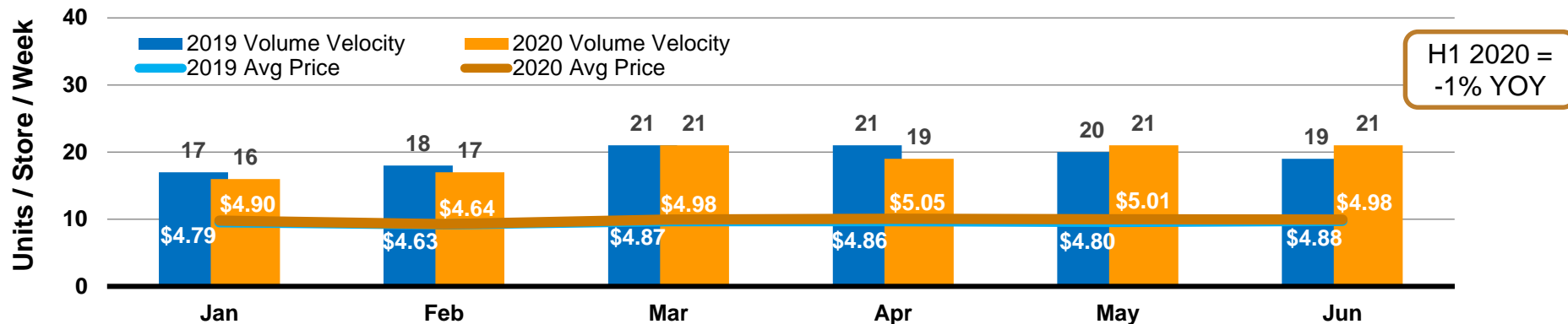


## WHOLE MANGO AT RETAIL Sales Velocity

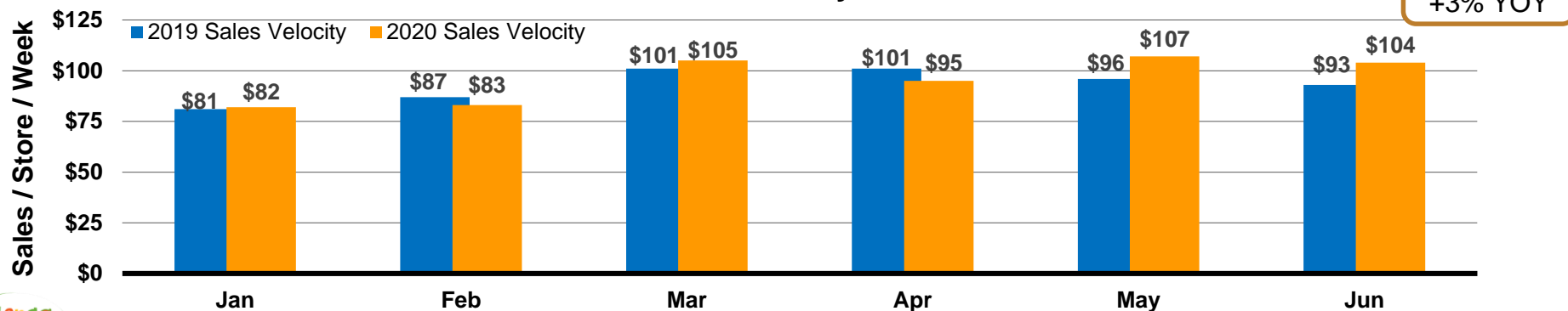
H1 2020 =  
+10% YOY



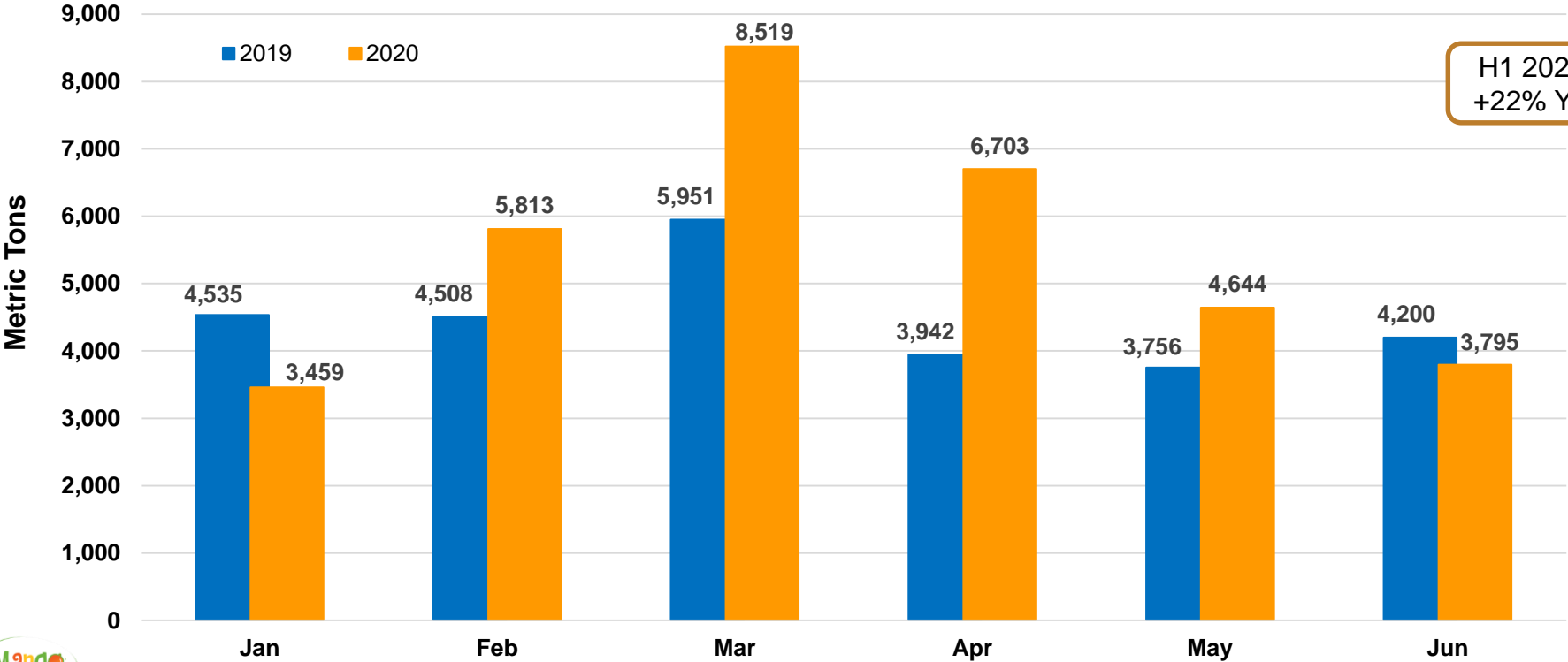
## FRESH-CUT MANGO AT RETAIL Volume Velocity and Avg. Price



## FRESH-CUT MANGO AT RETAIL Sales Velocity



# FROZEN MANGO Import Volume



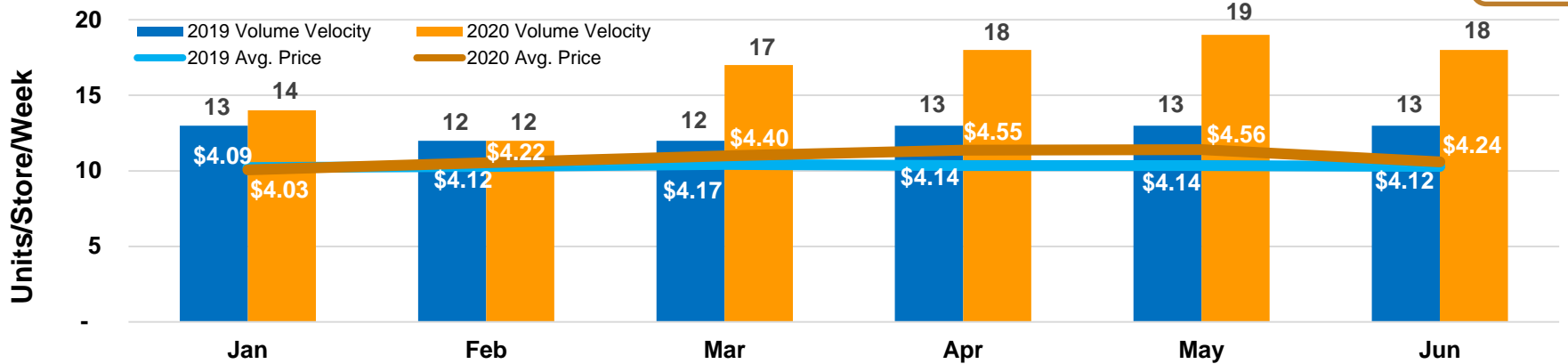
H1 2020 =  
+22% YOY



Sources: USDA-FAS Global Agricultural Trade System (GATS) Online

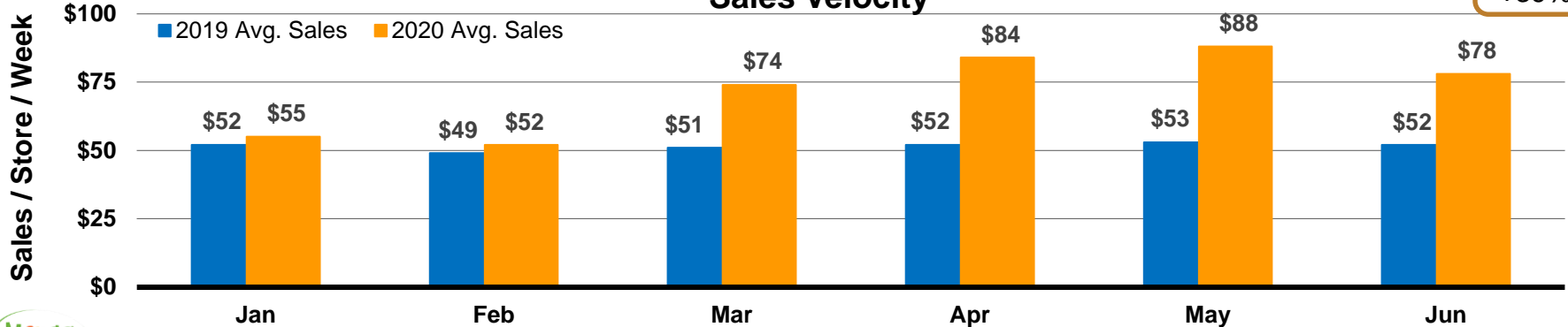
## FROZEN MANGO AT RETAIL Volume Velocity and Avg. Price

H1 2020 =  
+29% YOY



## FROZEN MANGO AT RETAIL Sales Velocity

H1 2020 =  
+39% YOY



# Summary: 2020 U.S. Mango Market

- Overall, mango market has experienced an increase in consumer demand during the first half of 2020
- Fresh-whole and fresh-cut mango had to overcome distribution challenges in early April, but rebounded into May and June
- Frozen mango has had higher than normal supply and demand during the first half of 2020



# Adrian Tennant

VP, Insights

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# Unprecedented Disruption

*“Never before in the recent past of our nation have we been forced to confront the magnitude of abrupt changes that COVID-19 circumstances foisted upon us all. So the food industry... suddenly found itself facing an unprecedented disruption.”*

**David Fikes,**

Executive Director, FMI Foundation



# Unprecedented Disruption

US Economy Suffers Historic Slowdown



Stimulus Checks Drive Increased Food Sales



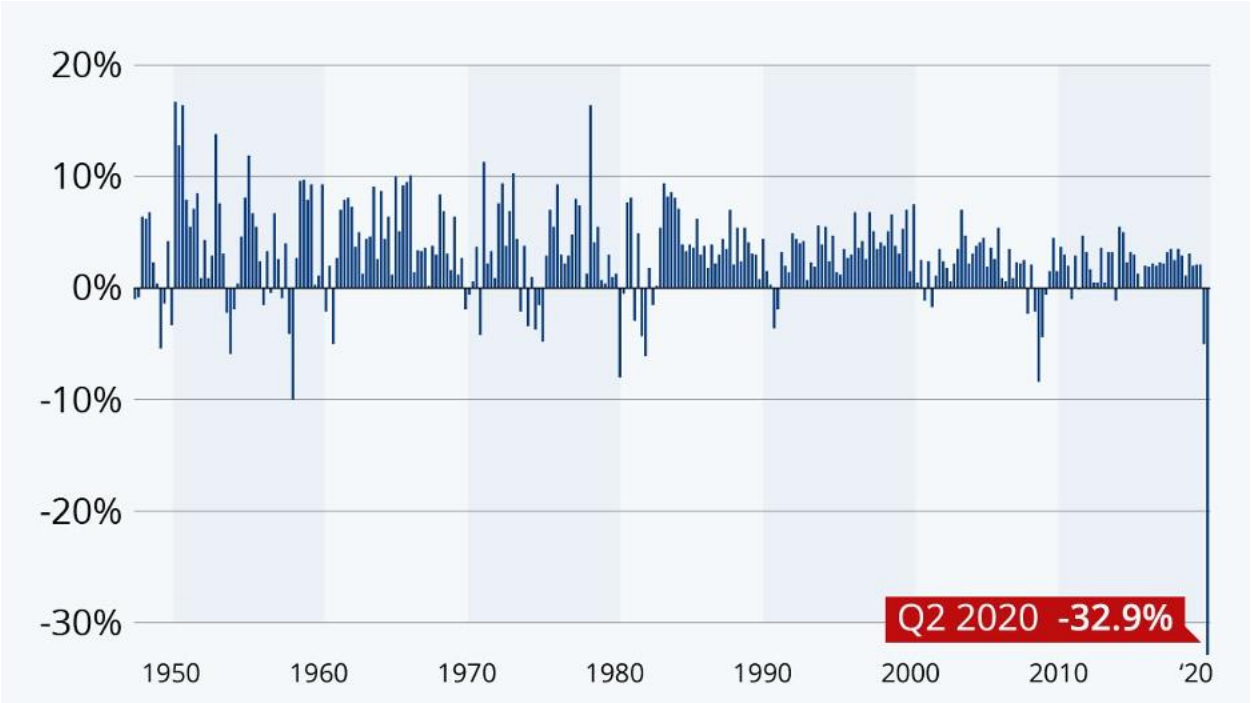
Restaurant Industry Collapses



Food Delivery Surges



# US Economy Suffers Historic Slowdown Amid Pandemic



**-33%**

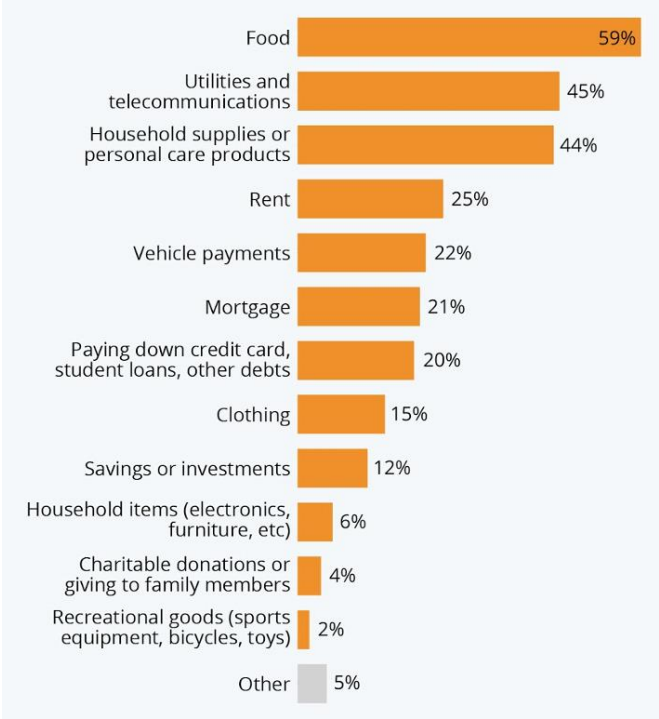
Decline in GDP in the second quarter of 2020

US Bureau of Economic Analysis, July 2020; Statista, July 2020

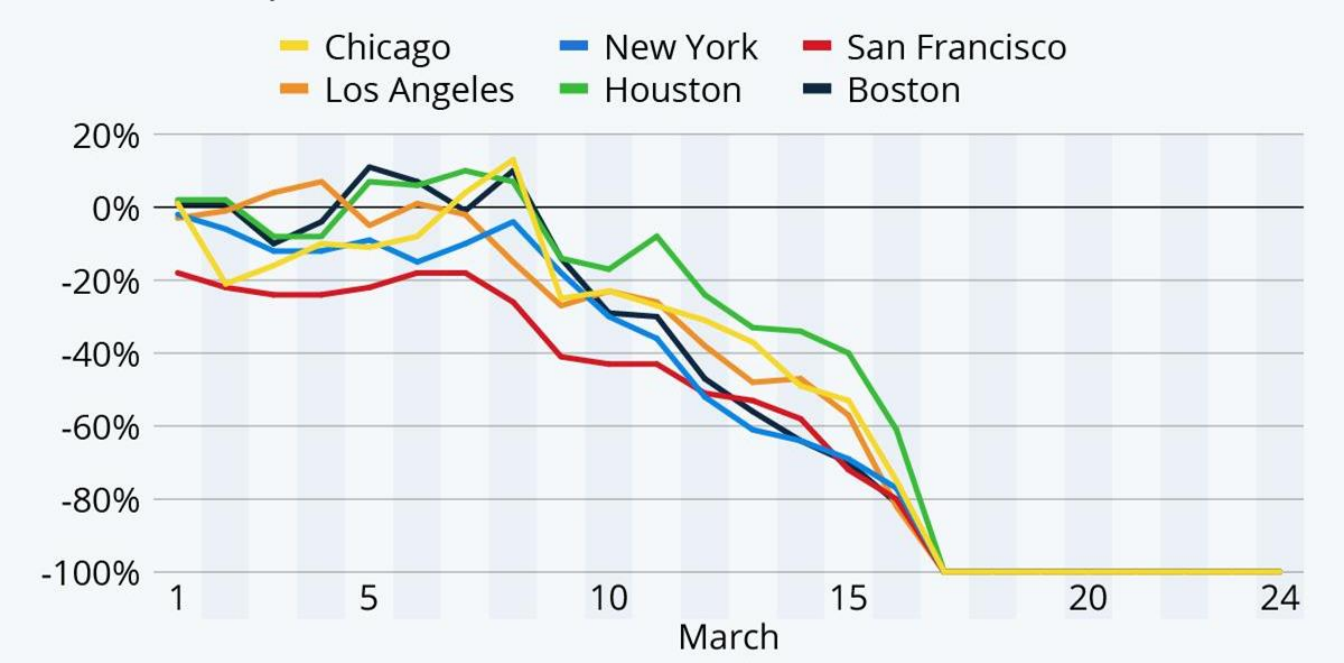
# How Americans Used Their Stimulus Checks

59%

of surveyed households said they used, or planned to use, their stimulus payment for food during the COVID-19 pandemic



# Foodservice Collapse



Year-over-year change in seated diners at restaurants on the OpenTable network, including online reservations, phone reservations, and walk-ins

# Changes in **Where** Consumers Shop

# 78%

of shoppers have made a change to **where** they shop as a result of the COVID-19 pandemic

Shop at fewer stores	<b>40%</b>
Shop online more	<b>28%</b>
Avoid stores I usually shop at	<b>15%</b>
Changed store I shop at most frequently	<b>11%</b>
Shop at different types of stores	<b>10%</b>
No longer shop in-store	<b>10%</b>

# Changes in **How** Consumers Shop

**89%**

of shoppers have made a change to **how** they shop as a result of the COVID-19 pandemic

Spend more money each visit	<b>44%</b>
Shopping trips are faster	<b>32%</b>
Purchase a narrower range of products	<b>25%</b>
Spend more money online	<b>16%</b>



# Changes in **Who** Shops for Grocery Items

# 36%

of shoppers have made a change to **who** shops as a result of the COVID-19 pandemic

Only one person shops when previously two or more shopped	<b>24%</b>
Someone outside the household (e.g. a relative or friend) shops	<b>11%</b>
Different person in household shops now	<b>3%</b>

# Cooking at Home More, Eating Healthily

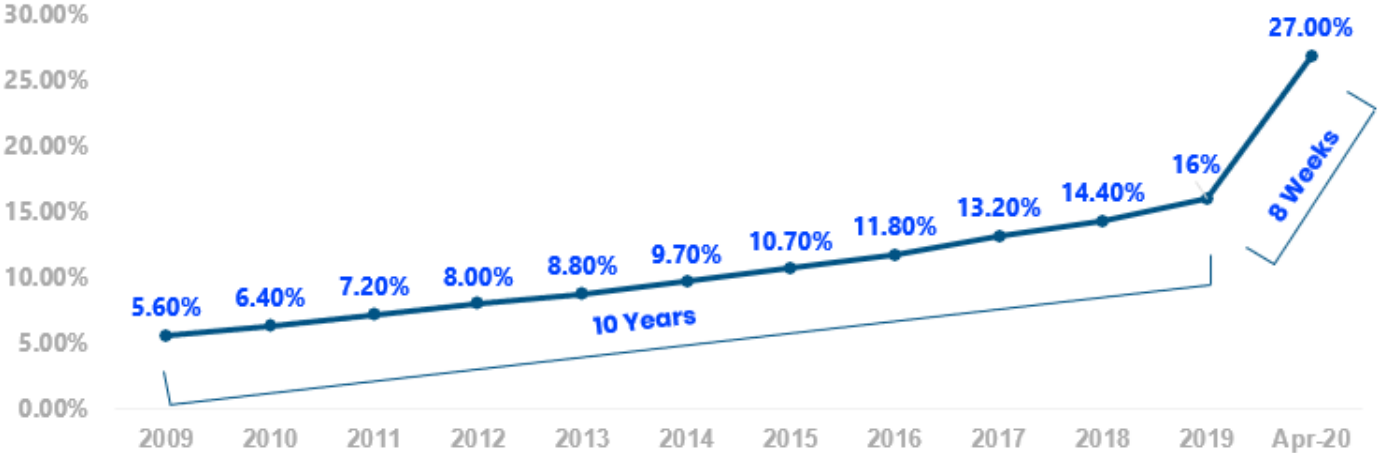
# 36%

of shoppers report **healthier eating habits**, compared to before COVID-19.

Cook more of my meals	<b>41%</b>
Plan more meals in advance	<b>27%</b>
Try new dishes more often	<b>20%</b>

# E-Commerce: Years Happening in Weeks

## U.S. Ecommerce Penetration (% of Retail Sales)

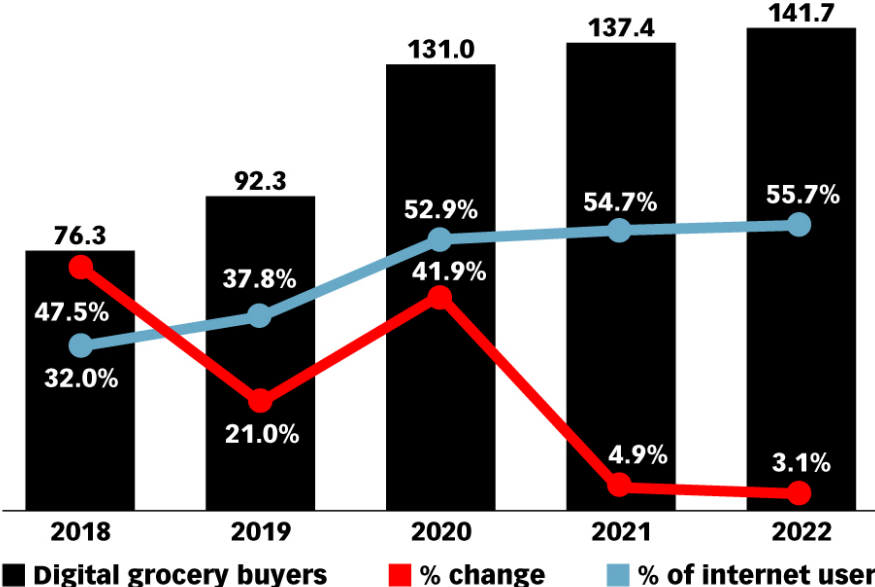


# Food and Beverage: Fastest Growing E-Com Category

# 58%

Year-over-year growth of food and beverage items purchased via digital channels in 2020

**US Digital Grocery Buyers, 2018-2022**  
*millions, % change and % of internet users*



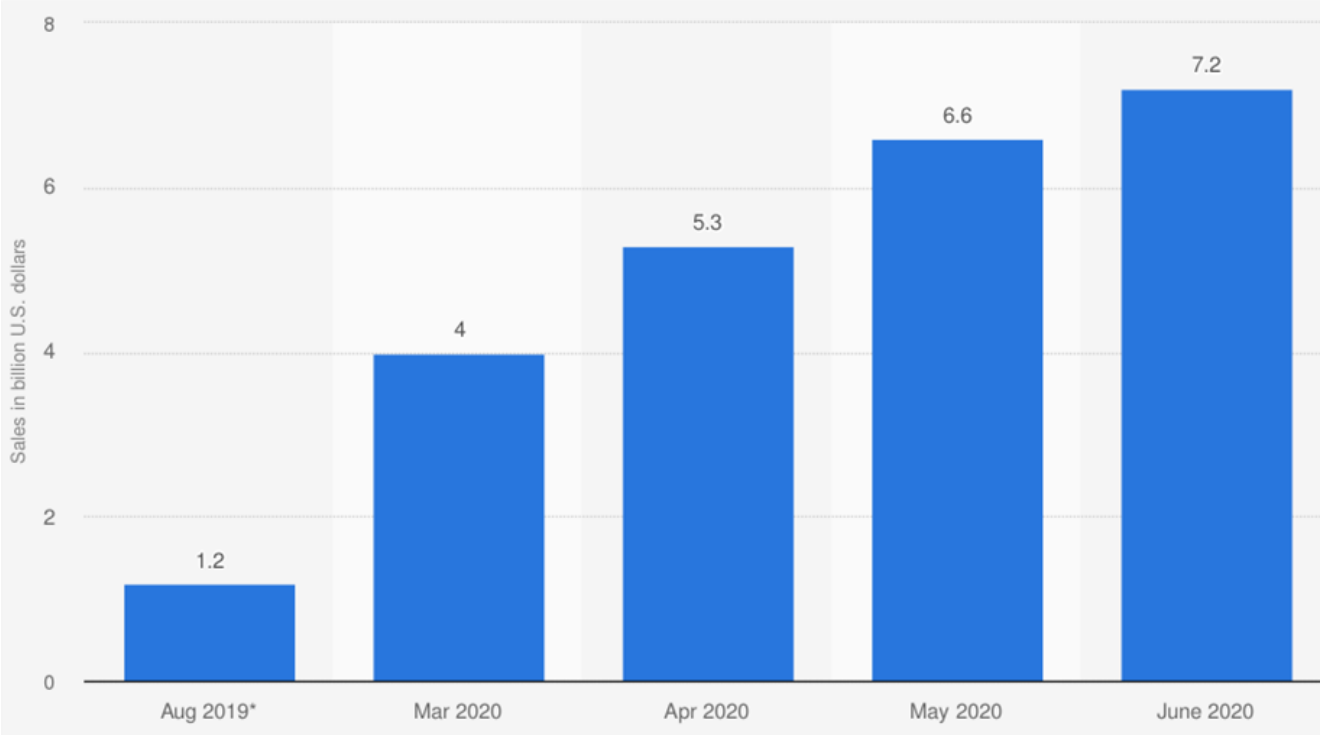
# Grocery Delivery and Pickup: Sales Growth

**233%**

Sales growth between August 2019 and March 2020

**80%**

Sales growth between March and June 2020.



*Sales of grocery delivery and pickup in the United States in August 2019 and March to June 2020 (in billions US dollars)*  
Statista, July 15, 2020

# Winners: Delivery and Pickup

Estimated year-over-year increase in **Amazon Fresh** orders.

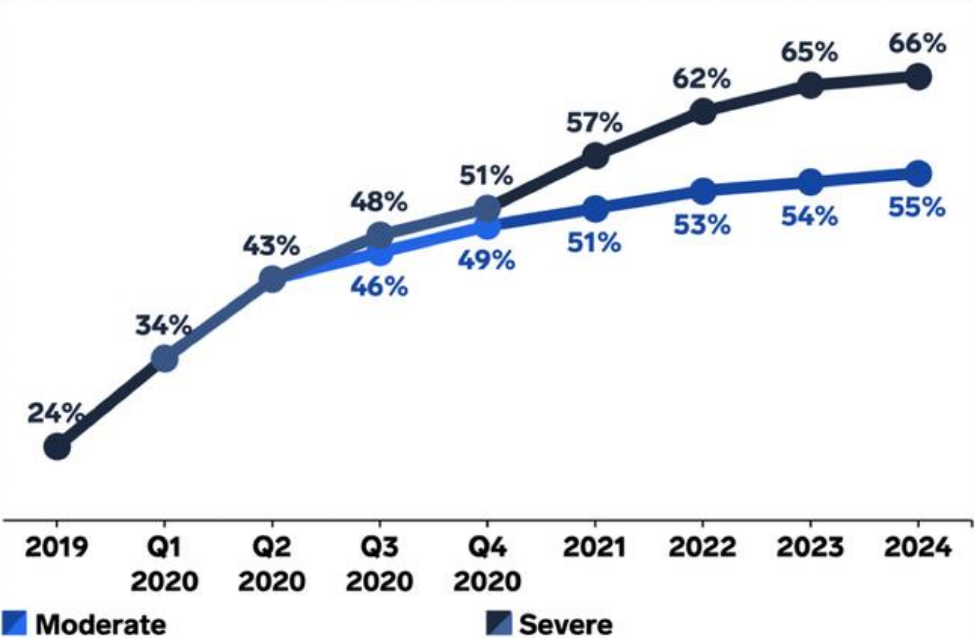
# 323%



# Implications



US Online Grocery Penetration Forecast



## New Habits?

**88%**

of adults expect a  
**persistent change**  
to cooking, dining,  
and shopping habits

**48%**

of adults expect to  
**prepare meals**  
**more frequently**

**38%**

of respondents  
expect to  
**eat out less often**



# Tricia Bramley

Director, Marketing & Communications

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# Break or Pivot?

What happens with retail?  
With foodservice?

How do we reach consumers now?

How do we look to the future?

# The Retail Pivot

# The Retail Pivot

In-Store Sampling Paused



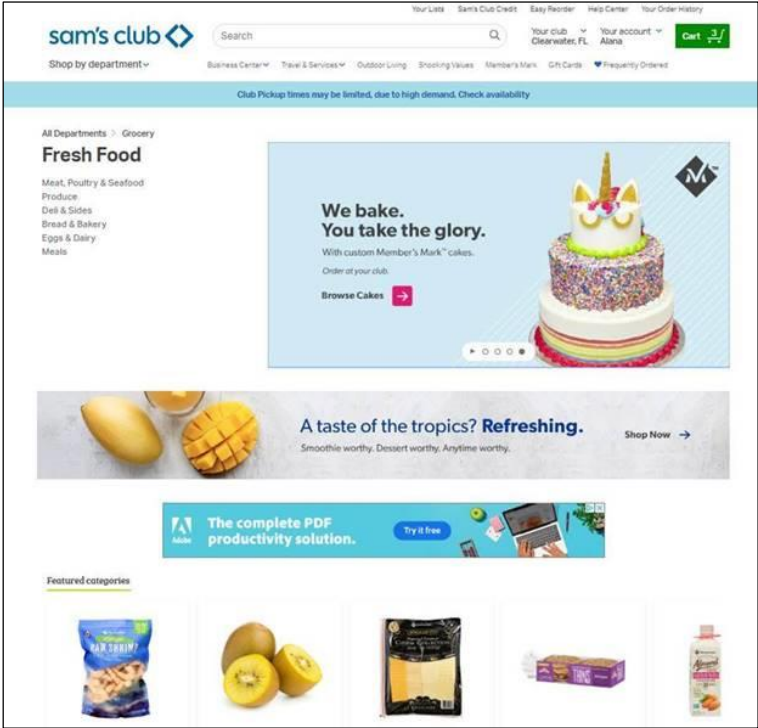
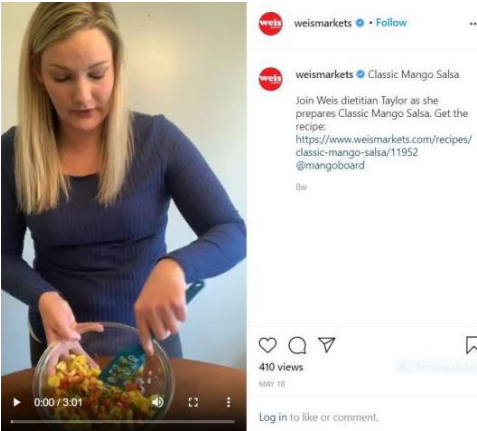
Retailers conserve floor space



Shoppers make trips quick



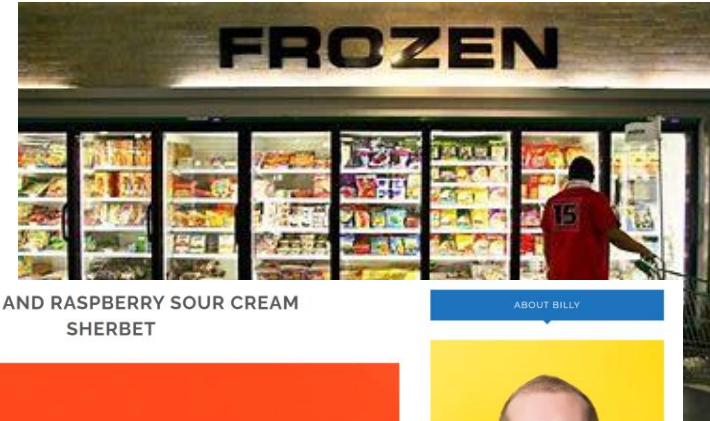
# The Retail Pivot



# The Retail Pivot: Frozen

We focused on narratives we could control and amplify in a world of chaos and uncertainty

- Build awareness and consumption of frozen mangos
- Increase overall knowledge
- Leverage consistent availability and versatility
- Leverage packing



MANGO AND RASPBERRY SOUR CREAM  
SHERBET

ABOUT BILLY



MY BOOK!



## Mango and Raspberry Sour Cream Sherbet

Serves 4-6

### For the Mango:

3 cups chopped fresh mango, frozen (about 2 mangos) or 3 cups frozen mango



# The Foodservice Pivot



# The Foodservice Pivot

“Restaurants and employees are feeling the catastrophic effect of the COVID-19 pandemic across the country. Since March 1, the industry has lost more than 3 million jobs and \$25 billion in sales, and roughly 50% of restaurant operators anticipate having to lay off more people in April.” – National Restaurant Association



Keep mangos top of mind with operators, chefs, and media

- Recipe and content development
  - Chef's video series – techniques and how to's
- Advertising – social media, foodservice trade publications, advertorials, and partnerships
- Social good opportunities



# The Social Pivot

# The Social Pivot

## Targeting

- Multiple variations of ads
- Performance constantly evaluated and adjusted
- Social listening to stay aware of concerns and conversation



Targeted ads based on archetypes



Interactive campaigns



Paid activations and partnerships



Sponsored posts



# The Social Pivot

## Mango Madness

Instagram Stories  
execution

Vote on favorite  
recipes. One will win!



## Happier Hours and Demos

Simple recipes

Nutrition focus

Easy to make at home



## Recipe Development

Recipe inspiration

Travel through taste

Tap into 'Quarantine  
Kitchen' initiatives

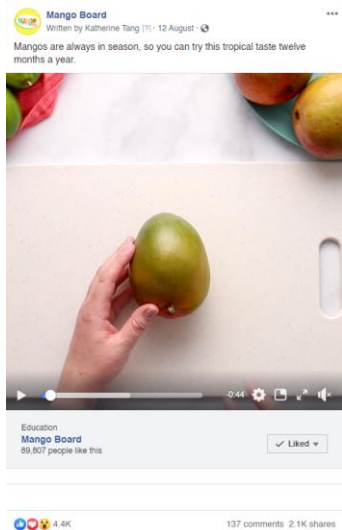


# The Web Pivot

# The Web Pivot

## Targeted Landing Pages

- Copy and imagery matched every ad we ran
- Benchmarked all of our metrics before we ran our ads
- A/B tested placement and UX for optimization
- Retargeted for additional messaging



## How to Cut a Mango

Mango Board March 28, 2017 Mango Tips



## A Video Demonstration

There are many ways to cut a mango. With all the cutting options, it can be difficult to choose the one that works best for you. To help with this decision, we created a quick video on how we like to cut our mangos.



## MANGO NUTRITION

In addition to sumptuous tropical flavor, mangos deliver nutritional value and make healthy eating a delightful sensory experience. The Dietary Guidelines for Americans recommend that healthy adults consume 5 to 13 servings of fruits and vegetables every day (based on a daily consumption of 1,200 to 3,200 total calories). That's where mangos come in! The versatile mango is available year round and adds delicious flavor to a balanced diet.

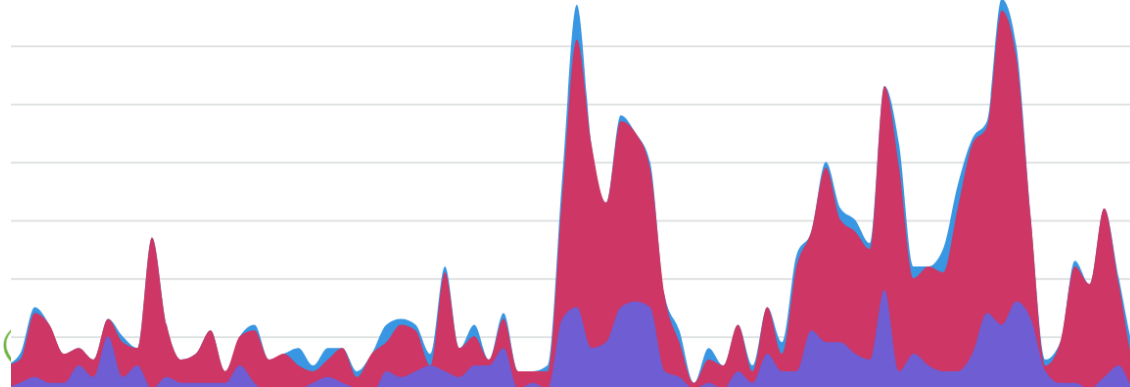


# The Full Plan Pivot: Results

# The Full Plan Pivot Results

## On the web:

- Users are up 98% through June
- New Users are up 102%
- Pageviews are up 112%
- Pages per session are up almost 10%
- Average session duration is up 11%



## On social:

- Audience growth is up 12%
- Total engagements is up 60%

# Pivoting into 2021



# The Full Plan Pivot: What Next?

We don't know what 2021 will look like, so we're using this time period to our advantage

- Data is king!
- Learning about our consumers: what makes them tick? What do they need from us?
- Finding more archetypes to focus on
- Optimize our user experience journeys on our sites
- Enhance our partnerships with retailers and influencers

And now it's time to get back to basics

- Create exciting meaningful content that resonates and educates
- Enhance our future programs with this data

# Thanks for attending!

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