Welcome
Welcome

National Mango Board’s Consumer Research
What is the National Mango Board?

• The National Mango Board (NMB) is a national promotion and research organization, supported by assessments from U.S. and imported mangos.
Mission

To increase the consumption of fresh mangos in the U.S. by conducting promotion and market, and production research
Research

• All of our marketing messages and initiatives are supported by a solid foundation of intensive research in nutrition and consumer research.
Consumer Research

Mango Demand
- Market Penetration (MP)
  - Attracting new consumers to the market
- Market Intensity (MI)
  - Amount purchased

Total Demand = U.S. Households × MP × MI
Data Collection

• On a monthly basis, through e-mail, the NMB surveys a panel of about 600 – 1,000 consumers to track mango purchases over the previous 2-week period
• This information is used to identify trends in household penetration, how many mangos were purchased per household, average price paid and other important indicators
• The sample is nationally representative on key demographic variables like age, gender, household income, and race/ethnicity
Consumer Research

Market Tools Data
- Over 65,000 Observations
- Periods from 2/2008 to 8/2012
- Demographics
- Attitudes and Behavior
- Health Status
- Prices
- Reasons for Buying
- Marketing Efforts by NMB
Demographic Demand Drivers

- Income
- Education
- Ethnicity
- Age
- Household Size
- Location
- Seasons

Range in Market Penetration

- Ethnicity: 4.50% - 12.77%
- Income: 5.32% - 13.40%
- Seasonal: 4.31% - 8.39%
- Regions: 3.80% - 7.40%
- Education: 5.47% - 7.74%
- Age: 5.55% - 6.79%
- Household Size: 5.75% - 6.78%
- Organics: 4.36% - 9.52%
- New Foods: 3.69% - 8.37%
- Healthier: 4.58% - 7.77%
- Eat Fruit & Veg: 4.47% - 7.17%
- Exercise: 5.62% - 6.41%
- Calories: 5.67% - 6.39%
- Income: 5.75% - 6.78%
- Price: 5.56% - 6.41%
While our consumer research models for market penetration (MP) and market intensity (MI) include many demand drivers, almost all of the impact of the NMB’s programs has been from attracting households to purchase mangos. Statistically very little impact on the number of mangos purchased per buying occasion (MI) has been made. Since there are nearly 120 million U.S. households, a small gain in market penetration can have a large impact on the total mango demand.
National Mango Board Impact

NMB Market Enhancement Impact

Percent of Households Buying Mangos

Percent of Actual NMB Market Enhancement Expenditures

Whole Mangos per Household
National Mango Board Impact

NMB Market Enhancement Impact with FOB Factor = .34

- Mar 08 - Jun 10: FOB Value = $362.55
- Mar 08 - Jun 11: FOB Value = $533.87
- Mar 08 - Jun 12: FOB Value = $752.72

With Programs Gain:
- $64.38
- $95.43
- $151.40

Without Program:
- $298.17
- $438.44
- $601.32
National Mango Board Impact

NMB Expenditures ($ mils.)

<table>
<thead>
<tr>
<th>Month</th>
<th>Expenditure</th>
<th>Return on Investment</th>
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</thead>
<tbody>
<tr>
<td>Mar 08-Jun 10</td>
<td>$8.65</td>
<td>ROI= 7.45</td>
</tr>
<tr>
<td>Mar 08-Jun 11</td>
<td>$12.28</td>
<td>ROI= 7.77</td>
</tr>
<tr>
<td>Mar 08-Jun 12</td>
<td>$16.16</td>
<td>ROI= 9.37</td>
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</tbody>
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Why consumers did not buy mangos?

- No one in my household likes the taste: 20.36%
- Just didn't think of it: 14.01%
- Didn't feel like eating them recently: 12.30%
- Too expensive: 10.28%
- Not available: 7.19%
- Not familiar with this fruit/vegetable: 7.07%
- Other: 6.73%
- Not on sale: 5.14%
- Not in season: 4.25%
- Do not know how to eat: 3.65%
- Cleaning/peeling: 2.91%
- Already have some at home: 1.92%
- Hard to select/pick ripe ones: 1.58%
- Not good for my diet: 0.76%
- Not the right color: 0.66%
- Did not like where it was grown: 0.56%
- Not the right size: 0.40%
- Did not like the packaging: 0.23%
Mango Attributes – Reasons for Buying

Percent of Buyers Ranking Each Attribute as Reason to Buy Mangos

- **Ripeness**: 42.16%
- **Price**: 40.22%
- **Fresh**: 34.35%
- **Appearance**: 32.47%
- **Quality**: 26.97%
- **Size**: 20.06%
- **Color**: 19.45%
- **Aroma**: 12.81%
- **Special**: 12.30%
- **Organic**: 7.36%
- **Package**: 6.30%
- **Origin**: 5.42%
- **Adver**: 3.61%

Reason Ranking:
- **1st**
- **2nd or 3rd**
Conclusions

Demand Drivers

- The relative importance of each demand driver was shown with ethnicity being one of the most important factors.

Market Penetration vs. Market Intensity

- Most of the changes in the demand for mangos come from attracting households to buy (market penetration) and far less in changing the number of mangos purchased (market intensity) per buy.

NMB Impact on Mango Demand

- Over the months from March 2008 through June 2012, total demand is 25% greater than it would have been in the absence of the NMB’s programs.
Conclusions

Return on Investment (ROI)

- ROI from the NMB’s programs is estimated to be 9.37
- That is, for each dollar invested in the NMB, a total of $9.37 additional FOB revenue is generated
Conclusions

Reasons for Buying and Not Buying Mangos

- Most of the reasons for not buying mangos related to the attitudes and preferences of the shopper
- The reasons for buying were more closely tied to the attributes of the fruit
  - Ripeness and quality of the fruit were the most important reasons for purchasing mangos
Gracias!