NATIONAL WATERMELON PROMOTION BOARD
Summer 2018 Consumer Research Findings
PURPOSE
To design and implement a consumer tracking survey to enable the National Watermelon Promotion Board to grow demand

RESEARCH OBJECTIVES
1. Measure the attitudes and usage of watermelon
2. Identify perceived benefits of watermelon
3. Uncover consumers’ opinions on the safety of watermelon
4. Identify the drivers of purchasing watermelon
5. Understand the barriers of purchasing and consuming watermelon
6. Provide insights regarding the usage occasions of watermelon
7. Maintain the integrity of current tracker or calibrate current tracker
KEY FINDINGS

- Watermelon scores very high relative to other fruits for taste, safety, value, healthiness, and freshness
- Watermelon has seen modest increases in value, healthiness, safety, freshness over past three years
  - Watermelon is one of the only fruits to see consistent gains
- Most consumers are eating their fruit raw, with very few incorporating fruit in recipes
- Consumers want fruit that provides them with value and minimal waste
  - They are looking for fruit where they can use all of it and prepare in multiple ways
- Availability and Perceived Value are the main drivers to why consumers are not purchasing watermelon
  - Conversely, these are two top reasons a consumer could be encouraged to buy more watermelon
- Knowing how to pick a good watermelon is important for consumers and data suggests that consumers are becoming more knowledgeable year over year
Profile of Respondents
N=1,254

Gender
- 52% FEMALE
- 90% FOOD SHOPPER

The primary food shopper

Number of People Living in Household
- 7+ 1.7%
- 6 2.6%
- 5 7.0%
- 4 20.2%
- 3 18.1%
- 2 30.4%
- 1 20.0%

Weekly Grocery Spend
- $0 - $50 19%
- $51 - $100 38%
- $100 - $150 28%
- $151 - $200 8%
- $200+ 7%

Age
- 18-24 11%
- 25-34 21%
- 35-44 23%
- 45-54 16%
- 55-64 14%
- 65+ 15%

Number of Children Under 18 in House
- 0 0.0%
- 1 10.0%
- 2 23.0%
- 3 18.2%
- 4 2.0%
- 5 0.8%
- 6+ 0.2%

AIMPOINT RESEARCH
Demographics of Respondents

**Physical Activity Per Week**
- Everyday: 23.5%
- 4-6 Days: 24.1%
- 2-4 Days: 25.6%
- Once a Week: 7.6%
- Less Than Once a Week or Never: 19.2%

**Household Income**
- $0 - $49,999: 43%
- $50,000 - $99,999: 33%
- $100,000 - $149,999: 10%
- $150,000 - $199,999: 3%
- $200,000+: 4%

**Education Level**
- Some High School: 13%
- High School/GED: 21%
- Some College/2 Yr Program: 31%
- Bachelor's Degree: 26%
- Advanced Degree: 8%

**Ethnicity**
- Caucasian (Non-Hispanic): 73%
- African-American: 10%
- Hispanic/Latino: 10%
- Asian: 4%
- Other/Prefer not to say: 3%
### How have you used your mobile device to assist you with your grocery shopping

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To get coupons (digital or traditional)</td>
<td>20.8%</td>
</tr>
<tr>
<td>To keep my grocery list</td>
<td>19.5%</td>
</tr>
<tr>
<td>To find recipes</td>
<td>17.5%</td>
</tr>
<tr>
<td>To compare prices</td>
<td>15.8%</td>
</tr>
<tr>
<td>I don't use my mobile device to assist with grocery...</td>
<td>11.2%</td>
</tr>
<tr>
<td>To look up nutritional content</td>
<td>9.8%</td>
</tr>
<tr>
<td>To look up allergy information</td>
<td>4.4%</td>
</tr>
<tr>
<td>Other</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

Source: How have you used your mobile device to assist you with your grocery shopping?
A little over a third of consumers have used non-traditional grocery shopping methods.

Source: Have you ever used a grocery pick-up, grocery delivery, or meal kit delivery service such as PeaPod, ClickList, Hello Fresh, Wal-Mart Pick Up or Amazon Pantry?
FRUIT ATTITUDES & CONSUMPTION
I feel better when I purchase food that:

- Can be used in multiple recipes/meals: 17.2%
- Can be preserved/stored: 11.9%
- Are locally grown: 11.5%
- Are completely used (zero waste): 10.0%
- Are organic: 8.7%
- Are sustainably raised/grown: 8.3%
- Have eco-friendly packaging: 8.1%
- Are non-GMO: 7.3%
- Can be stretched by using the food scraps: 7.5%
- Can be composted/recycled: 6.5%
- None of these: 2.1%

Source: I feel better when I purchase food that is:
Percent of people that like the taste of...

- Apples: 73%
- Strawberries: 72%
- Bananas: 71%
- Grapes: 69%
- Watermelons: 67%
- Blueberries: 55%
- Oranges: 51%
- Cantaloupes: 51%
- Blackberries: 49%
- Raspberries: 48%
- Honeydews: 40%
- Pomegranates: 29%

Source: I enjoy the taste of:
Freshness Rankings

1. Apples
2. Oranges
3. Watermelon
4. Grapes
5. Cantaloupe
6. Pomegranate
7. Honeydew
8. Bananas
9. Strawberries
10. Blueberries
11. Blackberries
12. Raspberries

Source: Please rank the following fruits by how long each will stay fresh before you consume them by dragging and dropping them.
Please rate the following fruits in terms of value.

**RANKING OF FRUITS BY VALUE**

Percentage Point Gain YOY

- **2015 - 2016**
- **2016 - 2017**

- Oranges: -2
- Bananas: -11
- Cantaloupe: 4
- Watermelon: 16
- Apples: 7
- Honeydew: 0
- Grapes: 5
- Berries: 4

**RANKING OF FRUITS IN TERMS OF VALUE ON 0 – 10 SCALE**

- Bananas: 8.0
- Apples: 7.9
- Oranges: 7.8
- Strawberries: 7.6
- Watermelon: 7.5
- Grapes: 7.5
- Blueberries: 7.2
- Cantaloupe: 7.1
- Raspberries: 7.0
- Blackberries: 7.0
- Honeydew: 6.8
Please rate the following fruits in terms of health.

**RANKING OF FRUIT IN TERMS OF HEALTH, 0 – 10 SCALE**

- Apples: 8.4
- Oranges: 8.3
- Bananas: 8.3
- Strawberries: 8.1
- Blueberries: 8.1
- Raspberries: 7.8
- Grapes: 7.8
- Blackberries: 7.8
- Watermelon: 7.8
- Pomegranate: 7.5
- Cantaloupe: 7.5
Please rate the following fruits in terms of safety.

**RANKING OF FRUIT BY SAFEST**
Percentage Point Gain YOY

- Oranges: 2015 - 2016: 0, 2016 - 2017: 1
- Watermelon: 2015 - 2016: 3, 2016 - 2017: 0
- Grapes: 2015 - 2016: 0, 2016 - 2017: -1

**PERCENT OF PEOPLE THAT BELIEVE FRUIT IS SAFE**

- Oranges: 93%
- Bananas: 90%
- Watermelon: 89%
- Apples: 88%
- Grapes: 85%
- Pomegranate: 84%
- Raspberries: 84%
- Blueberries: 84%
- Strawberries: 83%
- Honeydew: 82%
- Cantaloupe: 82%
- Blackberries: 84%

Please rate the following fruits in terms of safety.
How safe do you believe produce sold in the United States is for consumers?

Source: On a scale of 0-10 where 0 is not at all safe and 10 is extremely safe, how safe do you believe produce sold in the United States is for consumers?

IF A FOOD SAFETY ISSUE WERE TO OCCUR, WHICH OF THE FOLLOWING GROUPS ARE TO BLAME?
<table>
<thead>
<tr>
<th>Fruit</th>
<th>Safe (%) generally think</th>
<th>Healthy (0 – 10)</th>
<th>Value (0 – 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oranges</td>
<td>93%</td>
<td>8.28</td>
<td>7.78</td>
</tr>
<tr>
<td>Bananas</td>
<td>90%</td>
<td>8.25</td>
<td>8.03</td>
</tr>
<tr>
<td>Watermelon</td>
<td><strong>89%</strong></td>
<td><strong>7.65</strong></td>
<td><strong>7.43</strong></td>
</tr>
<tr>
<td>Apples</td>
<td>88%</td>
<td>8.37</td>
<td>7.89</td>
</tr>
<tr>
<td>Grapes</td>
<td>85%</td>
<td>7.80</td>
<td>7.48</td>
</tr>
<tr>
<td>Blueberries</td>
<td>84%</td>
<td>8.08</td>
<td>7.22</td>
</tr>
<tr>
<td>Raspberries</td>
<td>84%</td>
<td>7.74</td>
<td>6.97</td>
</tr>
<tr>
<td>Pomegranate</td>
<td>84%</td>
<td>7.64</td>
<td>6.56</td>
</tr>
<tr>
<td>Strawberries</td>
<td>83%</td>
<td>8.05</td>
<td>7.59</td>
</tr>
<tr>
<td>Blackberries</td>
<td>82%</td>
<td>7.79</td>
<td>6.98</td>
</tr>
<tr>
<td>Cantaloupe</td>
<td>82%</td>
<td>7.50</td>
<td>7.05</td>
</tr>
<tr>
<td>Honeydew</td>
<td>82%</td>
<td>7.36</td>
<td>6.83</td>
</tr>
</tbody>
</table>

Source: Please rate the following in terms of how healthy you consider them to be using a scale from 0-10 where 0 being not healthy at all and 10 being extremely healthy. Please rate the fruits on how safe you consider them to be. Please rate the following fruits in terms of value.
<table>
<thead>
<tr>
<th>Fruit</th>
<th>Grocery Store</th>
<th>Club Store</th>
<th>Farmer's Market</th>
<th>Roadside Stand</th>
<th>Convenience Store</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apples</td>
<td>73.1%</td>
<td>6.4%</td>
<td>11.0%</td>
<td>4.1%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Bananas</td>
<td>76.1%</td>
<td>6.3%</td>
<td>7.8%</td>
<td>3.7%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Blackberries</td>
<td>63.3%</td>
<td>8.1%</td>
<td>15.3%</td>
<td>5.3%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Blueberries</td>
<td>64.7%</td>
<td>8.1%</td>
<td>14.7%</td>
<td>6.8%</td>
<td>5.7%</td>
</tr>
<tr>
<td>Cantaloupe</td>
<td>66.0%</td>
<td>5.8%</td>
<td>14.9%</td>
<td>6.4%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Grapes</td>
<td>74.5%</td>
<td>7.2%</td>
<td>8.5%</td>
<td>3.2%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Honeydew</td>
<td>60.1%</td>
<td>8.3%</td>
<td>16.4%</td>
<td>7.3%</td>
<td>7.7%</td>
</tr>
<tr>
<td>Oranges</td>
<td>72.4%</td>
<td>6.3%</td>
<td>9.6%</td>
<td>5.3%</td>
<td>6.4%</td>
</tr>
<tr>
<td>Pomegranate</td>
<td>60.1%</td>
<td>9.2%</td>
<td>14.3%</td>
<td>7.0%</td>
<td>9.4%</td>
</tr>
<tr>
<td>Raspberries</td>
<td>63.6%</td>
<td>9.1%</td>
<td>15.0%</td>
<td>5.1%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Strawberries</td>
<td>68.3%</td>
<td>7.8%</td>
<td>13.7%</td>
<td>5.3%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Watermelon</td>
<td>65.3%</td>
<td>7.7%</td>
<td>13.3%</td>
<td>7.0%</td>
<td>6.8%</td>
</tr>
</tbody>
</table>

Source: For each of the following types of fruit, please indicate where you primarily purchased it in the last 6 months (Without "Have Not Purchased")
CONSUMPTION OF FRUIT

- Do not use
- In a recipe
- Cooked
- Raw

For each of the following, how do you primarily consume it?
WATERMELON
ATTITUDES
Source: Describe watermelon using one word.
Which of the following statements do you know to be true about watermelon?

- None of these: 8%
- High in calcium: 11%
- Promotes blood flow: 13%
- Source of Vitamin B-6: 16%
- Source of Potassium: 16%
- Good for post-workout: 17%
- Low in fat: 35%
- Low in calories: 39%
- Good for hydration: 53%
- Source of Vitamin A: 20%
Source: Would knowing that watermelon is good for hydration make you want to purchase (or purchase more) of it in the future?
TYPE OF INFORMATION PREFERRED TO SEE DISPLAYED WITH WATERMELON AT A RETAIL STORE

- How to select a good one: 47%
- Health benefits: 42%
- Recipe ideas: 24%
- FDA nutrition labels: 23%
- How to cut: 23%
- Pretty pictures/beauty shots: 7%
- Other: 3%

Source: What type of information would you like to see displayed with watermelon at the retail store?
PERCENT SAYING YES TO KNOWING HOW TO PICK A WATERMELON

Source: Do you know how to pick a good watermelon?
What do you do with your watermelon before you consume it?

- Wash it and run it under tap: 61.1%
- Nothing: 35.2%
- Other: 3.8%

Source: What do you do with your watermelon before you consume it?
How do you store your watermelon?

Source: How do you store your watermelon?
ISSUES WITH WATERMELON QUALITY

PERCENT INDICATING PROBLEMS WITH WATERMELON PURCHASE

Source: Have you ever had a problem with the quality of watermelon that you’ve purchased?
Which of the following describes your watermelon quality issue?
Source: Please select the seasons in which you purchase each type of watermelon
Source: Please explain why you do not purchase:

- Poor Texture
- Don't Know How to Cut One
- Too Expensive/Not good Value
- Can't Guarantee Quality
- Too High In Sugar/Carbs
- Spoils Too Quickly
- Too Messy
- Don't Know How to Select Good One
- It's not available at the store where I shop
- Too Big
- Too Much Waste
- Don't Like Taste
- Too Expensive/Not good Value
- Don't Like Taste
- Don't Like Taste
- Don't Like Taste
- Don't Like Taste
Source: What might encourage you to purchase more watermelon?
Source: Please select the seasons in which you purchase each type of watermelon
Please explain why you do not purchase whole, large, or regular watermelon?
Source: Please select the seasons in which you purchase each type of watermelon
Please explain why you do not purchase whole miniature watermelon?

MINI WATERMELON

- Winter: 9.4%
- Spring: 11.6%
- Summer: 37.6%
- Fall: 20.7%

REASONS WHY DO NOT PURCHASE MINI WATERMELON
(OF THE 27.3% THAT DO NOT PURCHASE)

- Too Expensive/Not good Value: 28.5%
- It's not available at the store where I shop: 21.3%
- Don't Like Taste: 16.4%
- Don't Know How to Select Good One: 11.9%
- Too Much Waste: 10.7%
- Other: 8.7%
- Can't Guarantee Quality: 8.4%
- Too Big: 8.2%
- Too Messy: 6.5%
- Spoils Too Quickly: 5.2%
- Don't Know How to Cut One: 4.0%
- Too High In Sugar/Carbs: 3.2%
- Poor Texture: 3.2%
Source: Please select the seasons in which you purchase each type of watermelon
Please explain why you do not purchase fresh cut watermelon?

**Fresh Cut Watermelon**

- Winter: 14.2%
- Spring: 14.2%
- Summer: 37.1%
- Fall: 16.7%

**Reasons Why Do Not Purchase Fresh Cut Watermelon (Of the 29.5% That Do Not Purchase)**

- Too Expensive/Not good Value: 50.5%
- Spoils Too Quickly: 25.7%
- Can't Guarantee Quality: 22.9%
- Don't Like Taste: 9.9%
- It's not available at the store where I shop: 7.8%
- Other: 6.9%
- Too Much Waste: 5.5%
- Poor Texture: 5.5%
- Too Messy: 4.8%
- Too High In Sugar/Carbs: 3.4%
Source: Please select the seasons in which you purchase each type of watermelon
Please explain why you don’t purchase watermelon juice?

WATERMELON JUICE

- Winter: 8.9%
- Spring: 13.2%
- Summer: 20.6%
- Fall: 11.6%

REASONS WHY DO NOT PURCHASE WATERMELON JUICE

(OF THE 51% THAT DO NOT PURCHASE)

- It's not available at the store where I shop: 31.9%
- Don't Like Taste: 29.9%
- Too Expensive/Not good Value: 15.8%
- Other: 14.9%
- Too High In Sugar/Carbs: 9.2%
- Can't Guarantee Quality: 6.2%
- Spoils Too Quickly: 4.0%
- Too Messy: 3.1%
- Poor Texture: 2.9%
- Too Much Waste: 2.3%
WATERMELON CONSUMPTION
When during the day do you eat the majority of Watermelon?

- Lunch: 18.7%
- Breakfast: 10.6%
- Dinner: 8.7%
- Snack: 12.4%
- Dessert: 49.6%

Source: When during the day do you eat the majority of Watermelon?
Most consumers are eating plain watermelon at home.

88% Plain Watermelon

12% Watermelon preparation for consumption

Source: How do you prepare watermelon for consumption?
CONSUMPTION

Source: Please select the seasons in which you purchase each type of watermelon
Source: Typically, in what ways do you consume watermelon at a restaurant? What would you consider ordering with watermelon at a restaurant?
Opportunities & Next Steps

1) Expanded distribution opportunities exist in the c-store channel

2) Snacking is #1 consumption occasion, exploit it with new formats and channels

3) Explore culinary development to expand watermelon usage in recipes, beverages, entrees and desserts

4) Emphasize education & communication on watermelon’s overall healthfulness and benefits
   • Hydration, Low in calories/fat, high in Vitamin C

5) Maximize watermelon’s safety, taste and freshness factors