



# 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

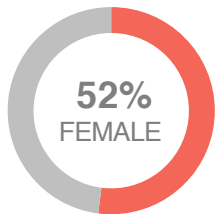


## KEY FINDINGS

- 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

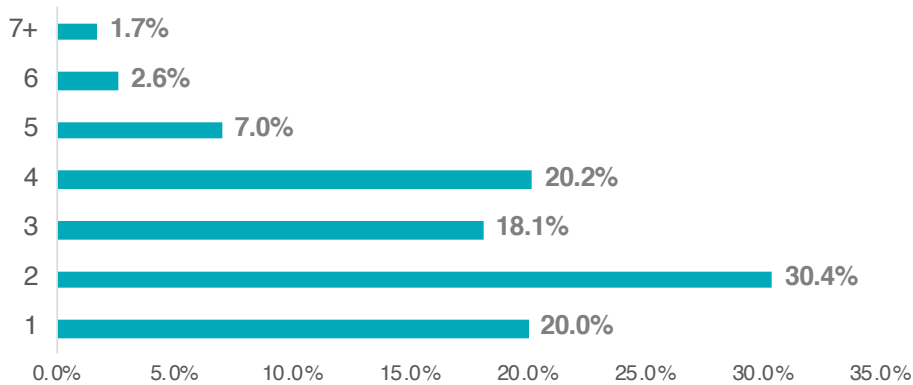


Gender

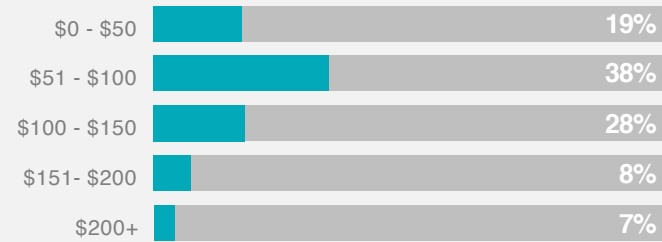


The primary food shopper

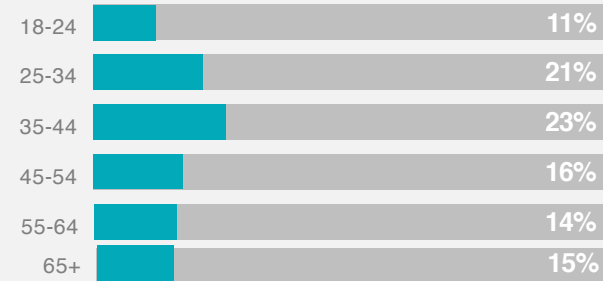
Number of People Living in Household



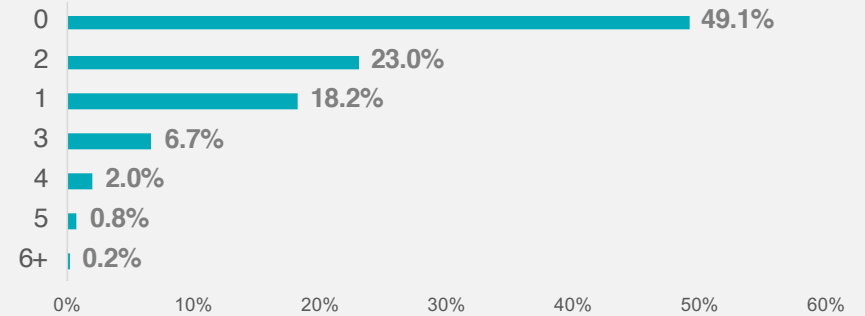
Weekly Grocery Spend



Age

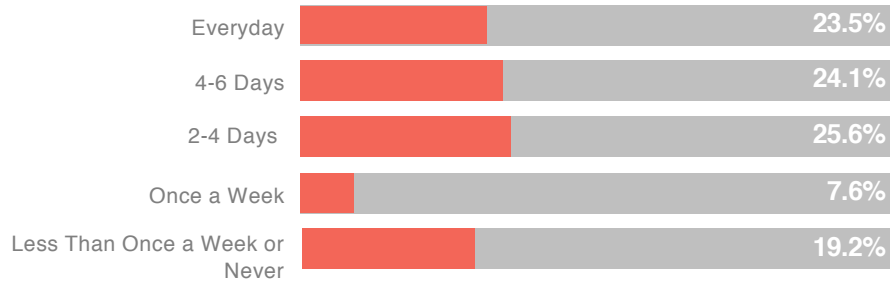


Number of Children Under 18 in House

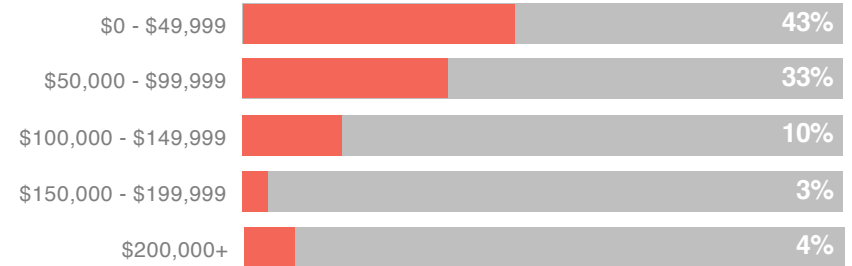


## Demographics of Respondents

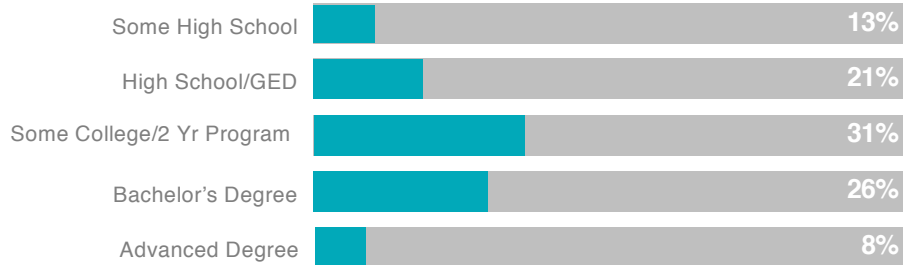
### Physical Activity Per Week



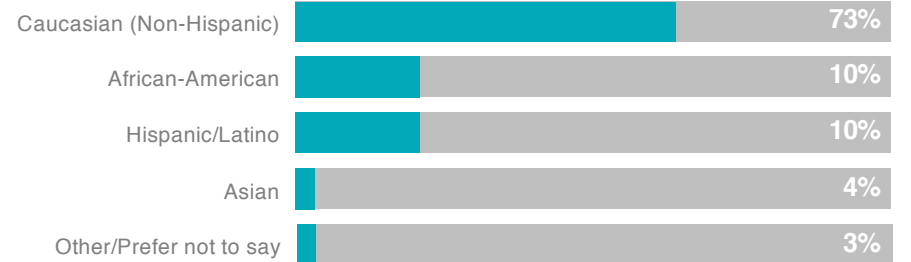
### Household Income



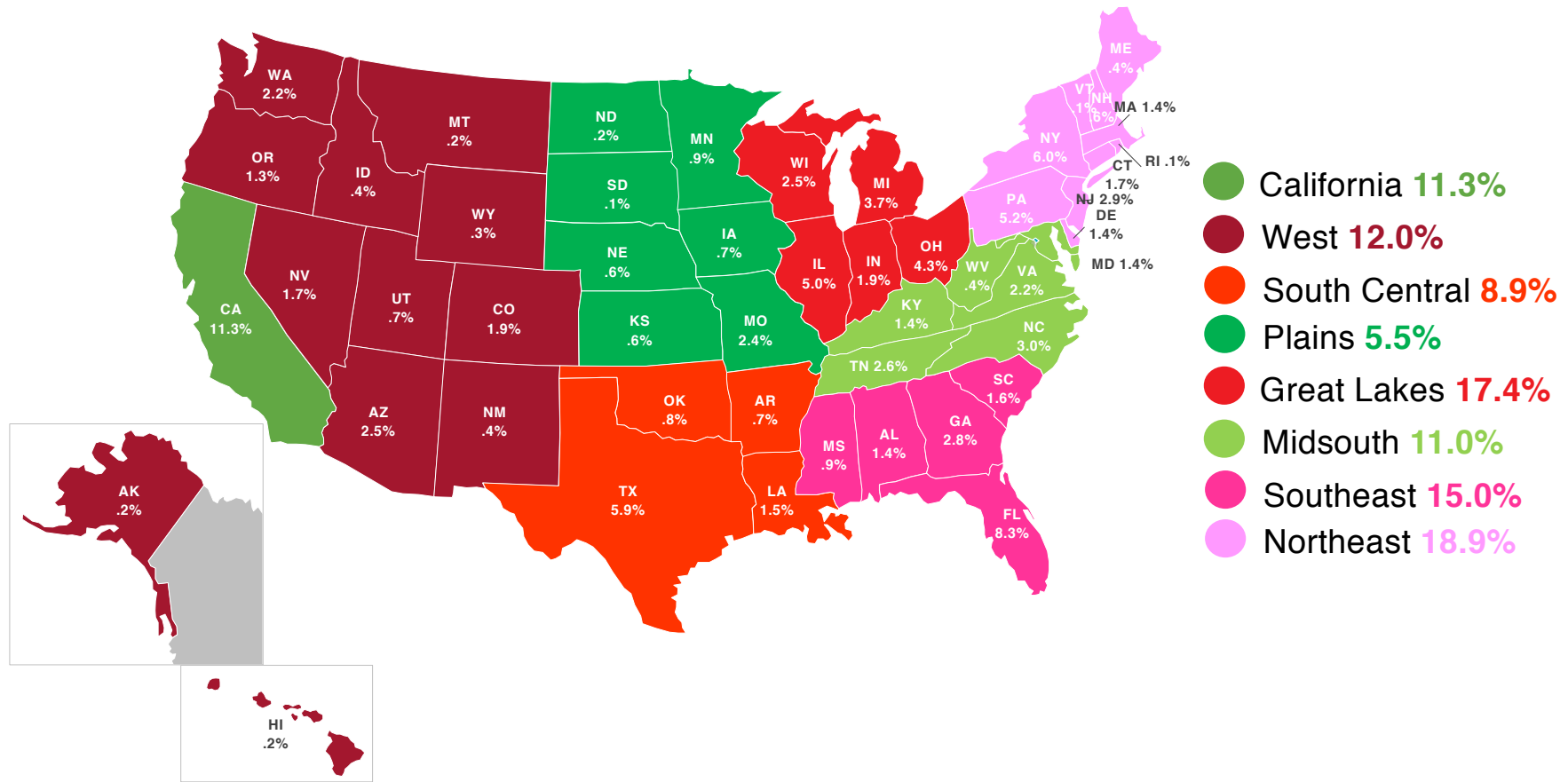
### Education Level



### Ethnicity

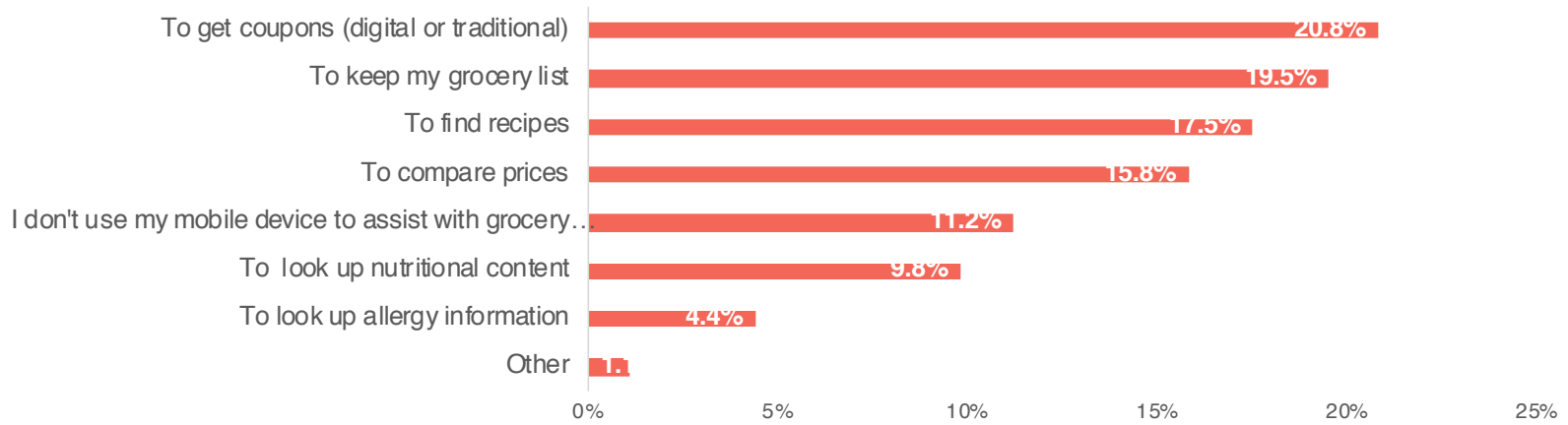


# Demographics of Respondents





### How have you used your mobile device to assist you with your grocery shopping



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.**

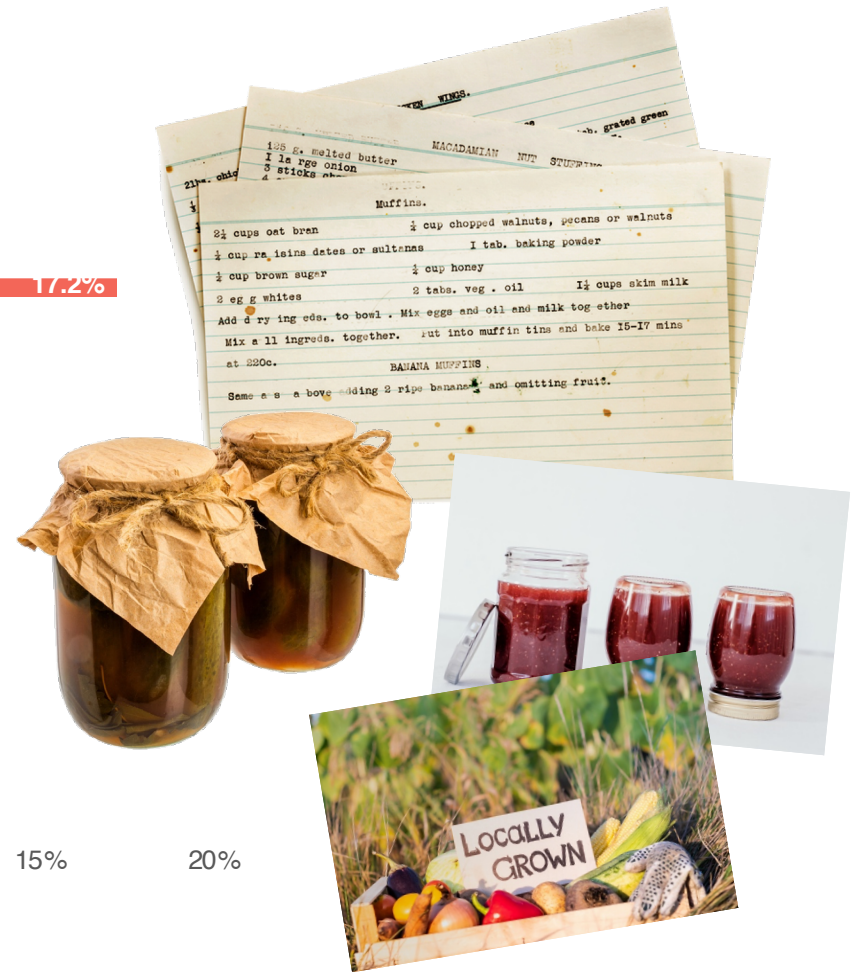
*Source: Have you ever used a grocery pick-up, grocery delivery, or meal kit delivery service such as PeaPod, ClickList, Hello Fresh, Wal-Mart Pick Up or Amazon Pantry?*





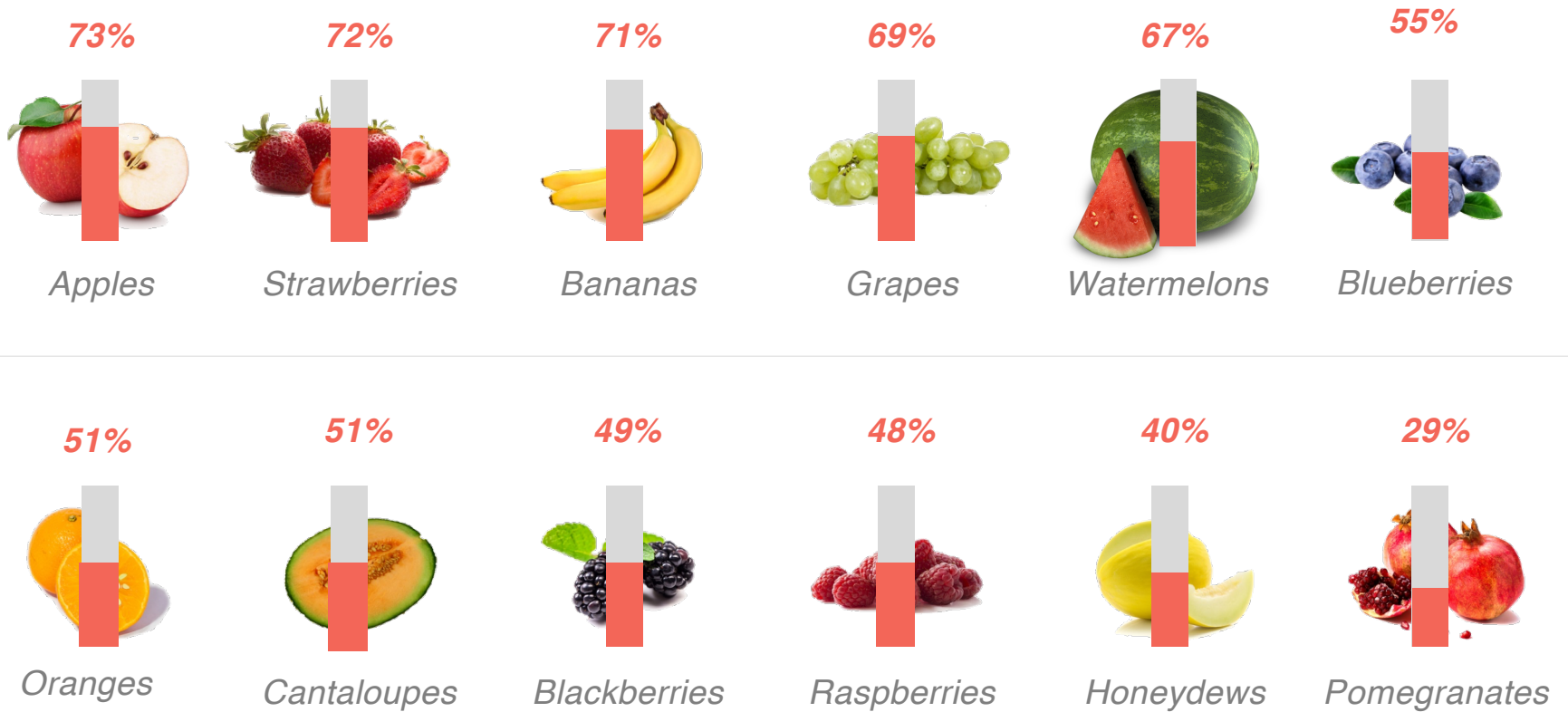
**FRUIT ATTITUDES  
& CONSUMPTION**

**I feel better when I purchase food that:**



Source: I feel better when I purchase food that is:

PERCENT OF PEOPLE THAT LIKE THE TASTE OF...



Source: I enjoy the taste of:

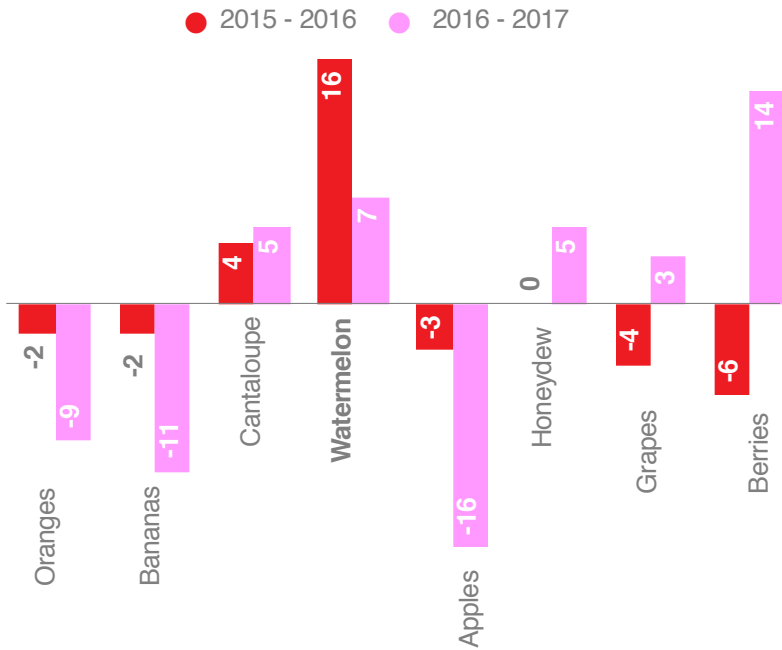
Freshness Rankings

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

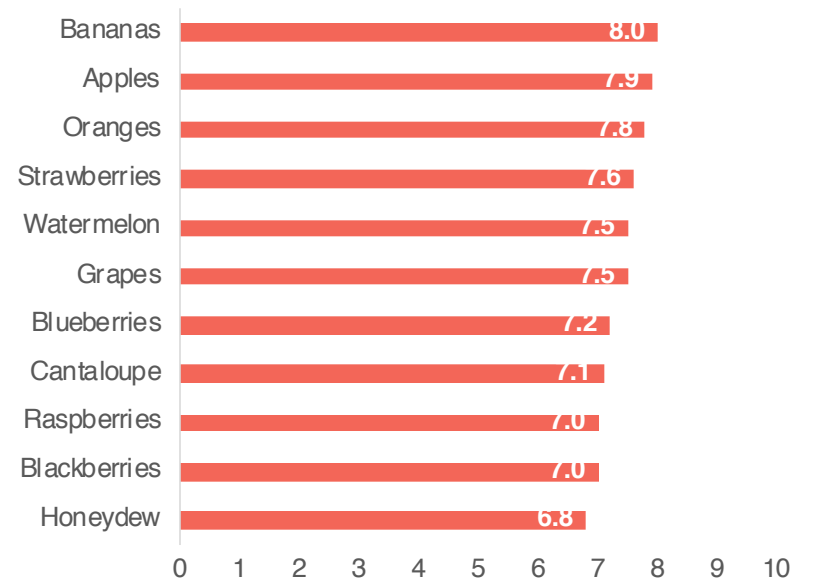
Source: Please rank the following fruits by how long each will stay fresh before you consume them by dragging and dropping them



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

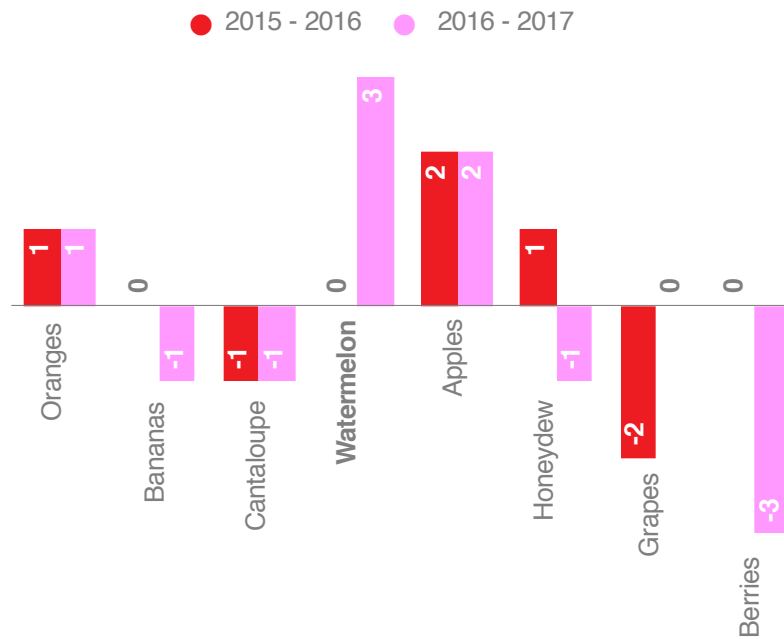


**RANKING OF FRUITS IN TERMS OF VALUE ON 0 – 10 SCALE**

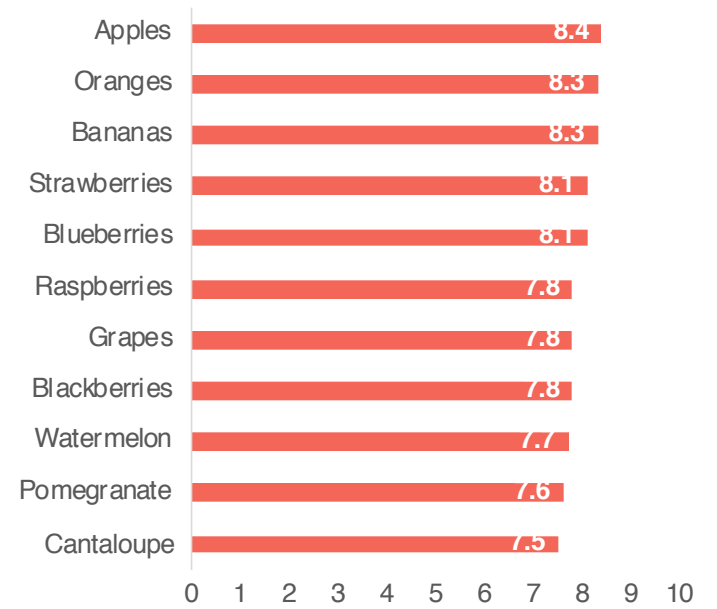


Please rate the following fruits in terms of value.

**RANKING OF FRUIT BY HEALTHY AND NUTRITIOUS**  
*Percentage Point Gain YOY*

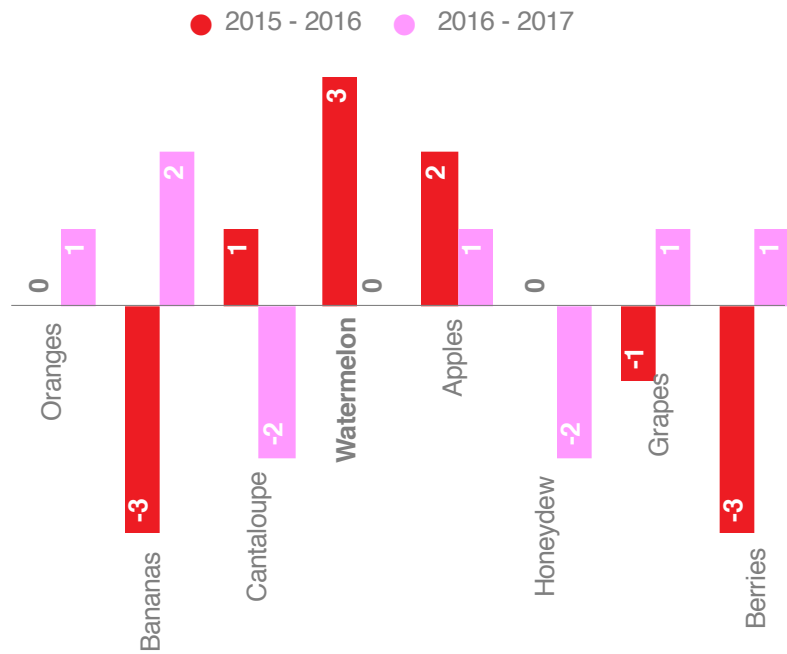


**RANKING OF FRUIT IN TERMS OF HEALTH, 0 – 10 SCALE**

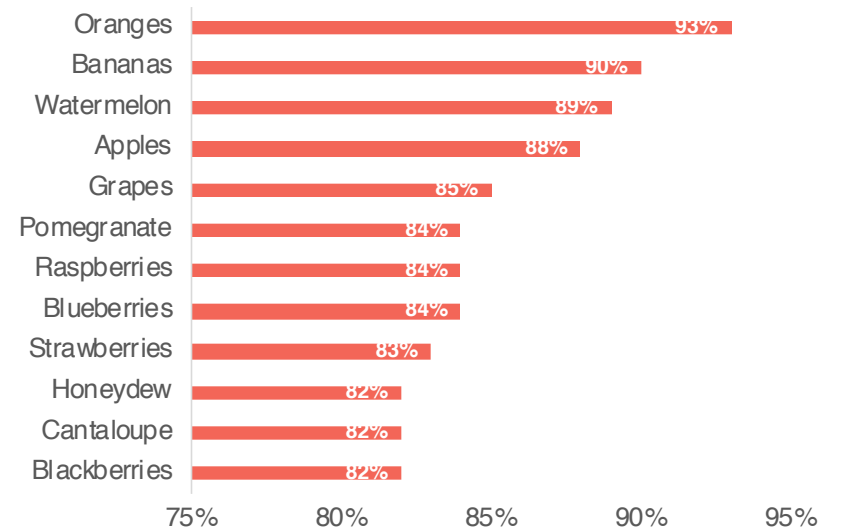


Please rate the following fruits in terms of health.

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



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

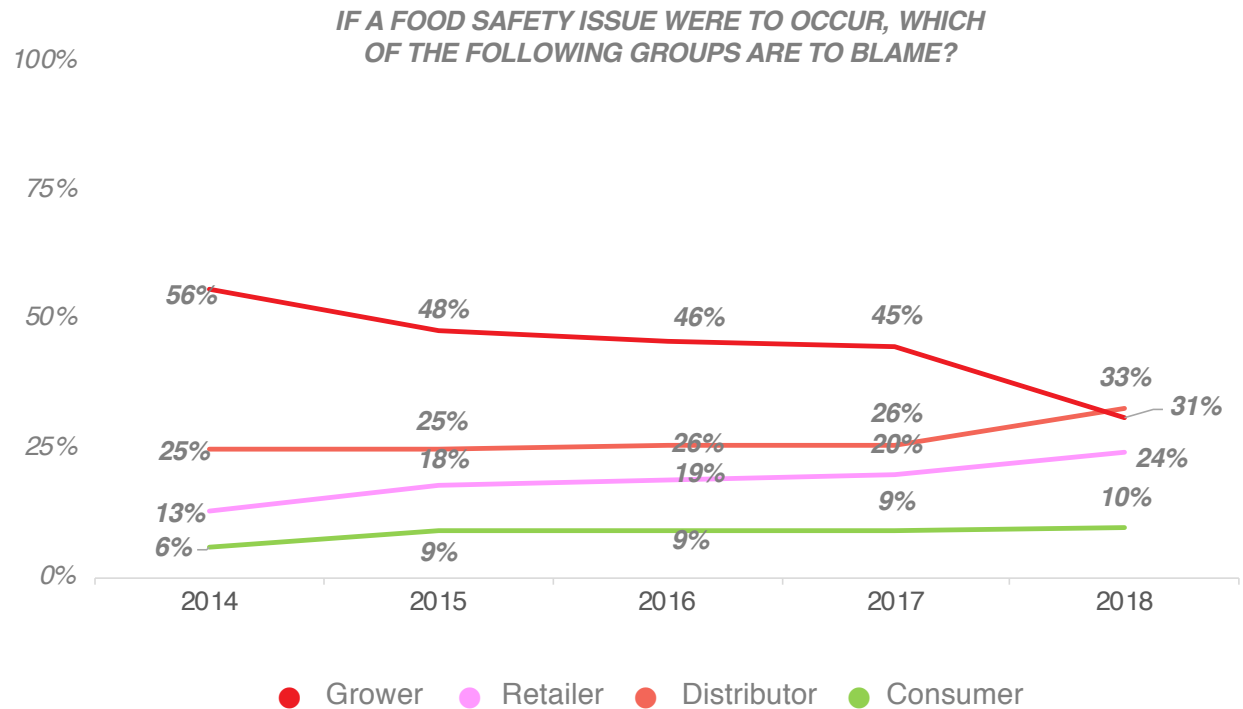


Please rate the following fruits in terms of safety.



**How safe do you believe produce sold in the United States is for consumers?**

*Asked on a scale from 0-10 where 0 is not at all safe and 10 is extremely safe,*



*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?*















## AGGREGATED RATING OF FRUITS

Fruit	Safe (% generally think)	Healthy (0 – 10)	Value (0 – 10)
Oranges	93%	8.28	7.78
Bananas	90%	8.25	8.03
<b>Watermelon</b>	<b>89%</b>	<b>7.65</b>	<b>7.43</b>
Apples	88%	8.37	7.89
Grapes	85%	7.80	7.48
Blueberries	84%	8.08	7.22
Raspberries	84%	7.74	6.97
Pomegranate	84%	7.64	6.56
Strawberries	83%	8.05	7.59
Blackberries	82%	7.79	6.98
Cantaloupe	82%	7.50	7.05
Honeydew	82%	7.36	6.83

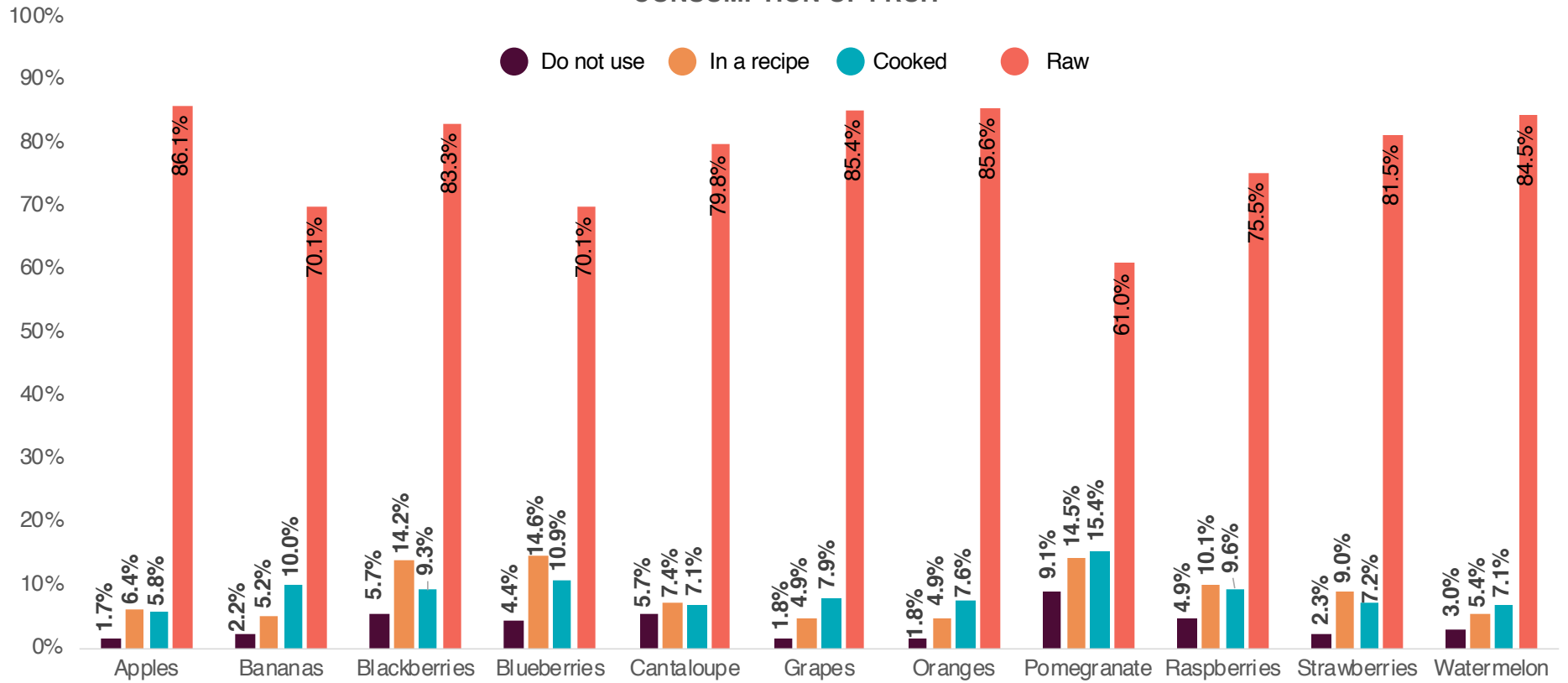
Source: Please rate the following in terms of how healthy you consider them to be using a scale from 0-10 where 0 being not healthy at all and 10 being extremely healthy. Please rate the fruits on how safe you consider them to be. Please rate the following fruits in terms of value.

### PRIMARY PLACE FRUIT IS PURCHASED

		GROCERY STORE	CLUB STORE	FARMER'S MARKET	ROADSIDE STAND	CONVENIENCE STORE
	<b>Apples</b>	73.1%	6.4%	11.0%	4.1%	5.4%
	<b>Bananas</b>	76.1%	6.3%	7.8%	3.7%	6.1%
	<b>Blackberries</b>	63.3%	8.1%	15.3%	5.3%	8.0%
	<b>Blueberries</b>	64.7%	8.1%	14.7%	6.8%	5.7%
	<b>Cantaloupe</b>	66.0%	5.8%	14.9%	6.4%	6.9%
	<b>Grapes</b>	74.5%	7.2%	8.5%	3.2%	6.6%
	<b>Honeydew</b>	60.1%	8.3%	16.4%	7.3%	7.7%
	<b>Oranges</b>	72.4%	6.3%	9.6%	5.3%	6.4%
	<b>Pomegranate</b>	60.1%	9.2%	14.3%	7.0%	9.4%
	<b>Raspberries</b>	63.6%	9.1%	15.0%	5.1%	7.2%
	<b>Strawberries</b>	68.3%	7.8%	13.7%	5.3%	5.0%
	<b>Watermelon</b>	65.3%	7.7%	13.3%	7.0%	6.8%

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



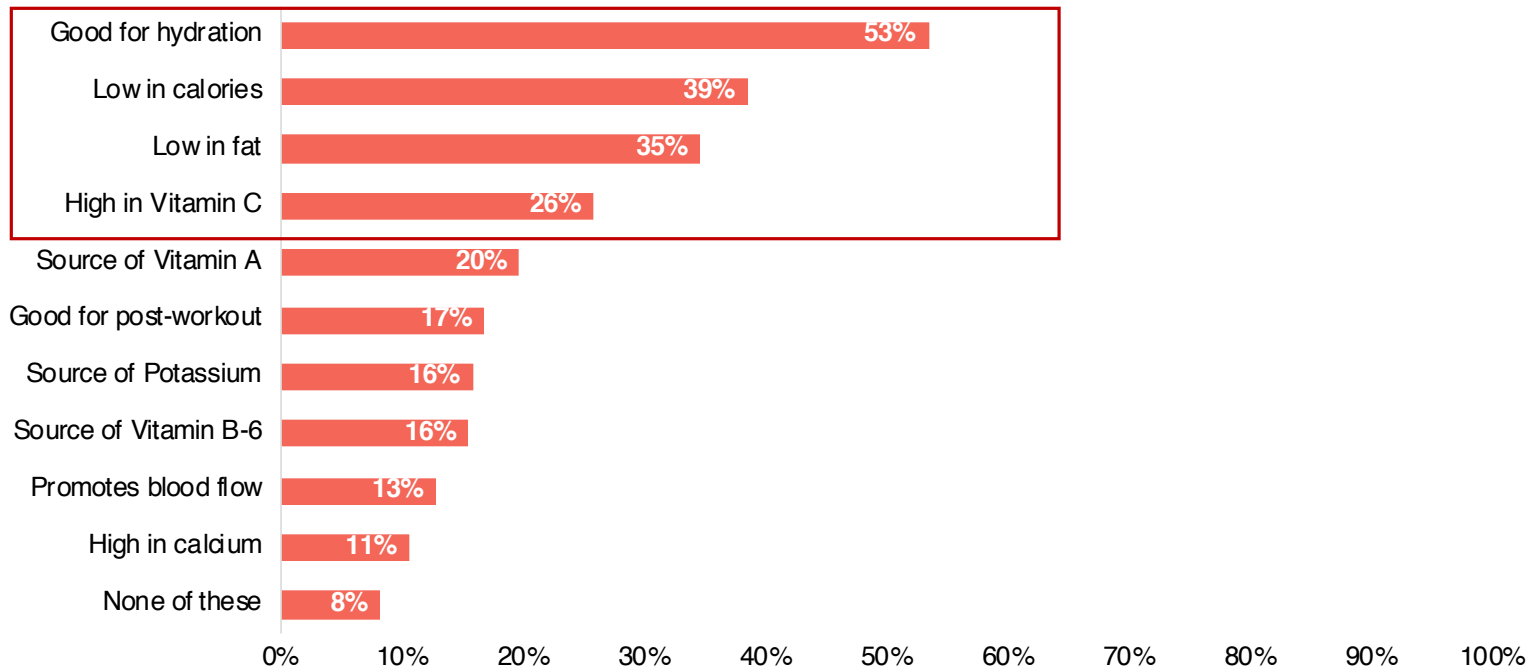
For each of the following, how do you primarily consume it?



# WATERMELON ATTITUDES

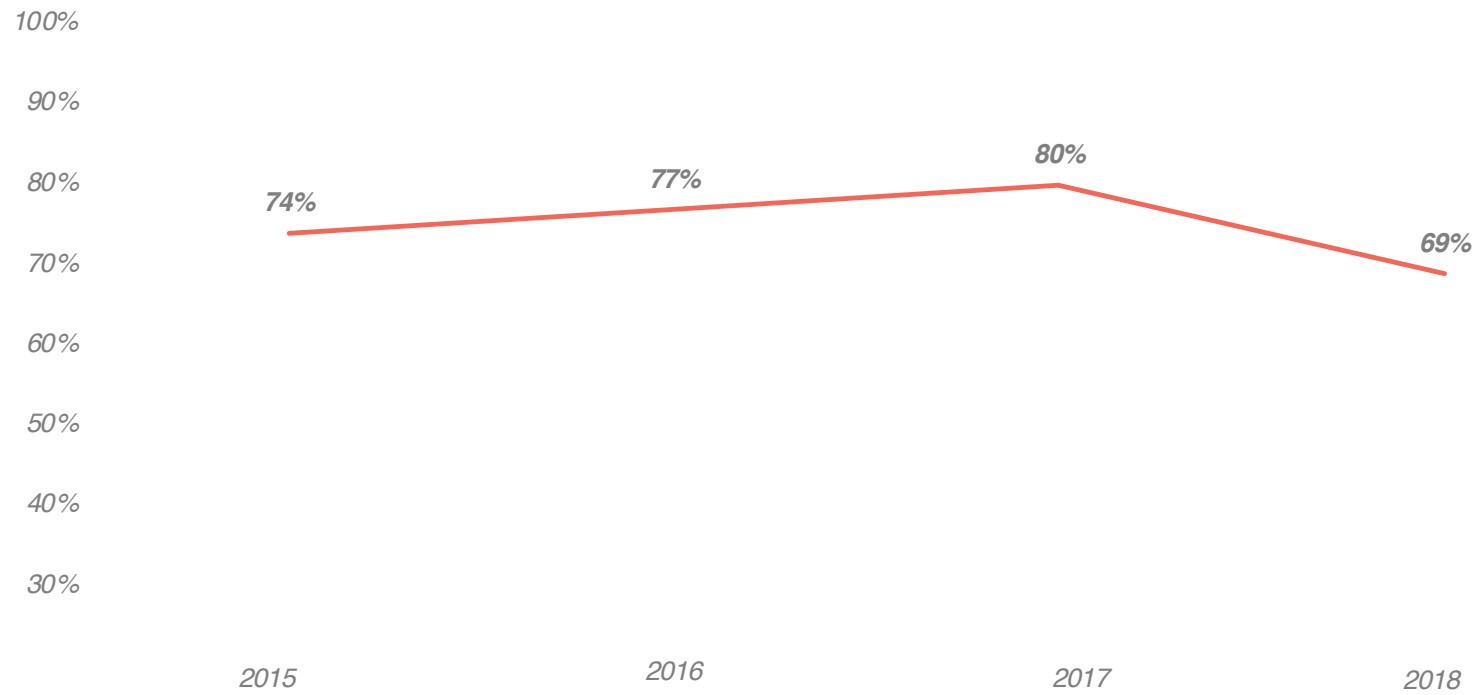


### RESPONDENTS UNDERSTANDING OF BENEFITS OF WATERMELON



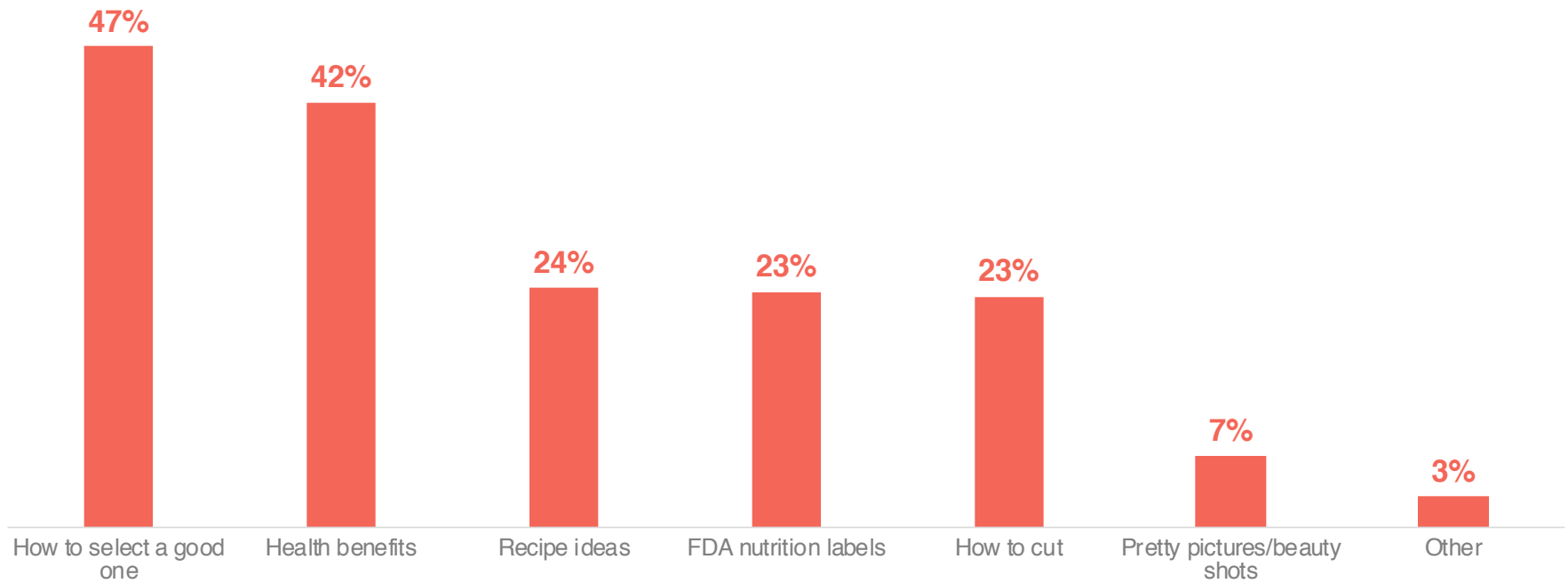
Source: Which of the following statements do you know to be true about watermelon?

**WATERMELON IS GOOD FOR HYDRATION**



Source: Would knowing that watermelon is good for hydration make you want to purchase (or purchase more) of it in the future?

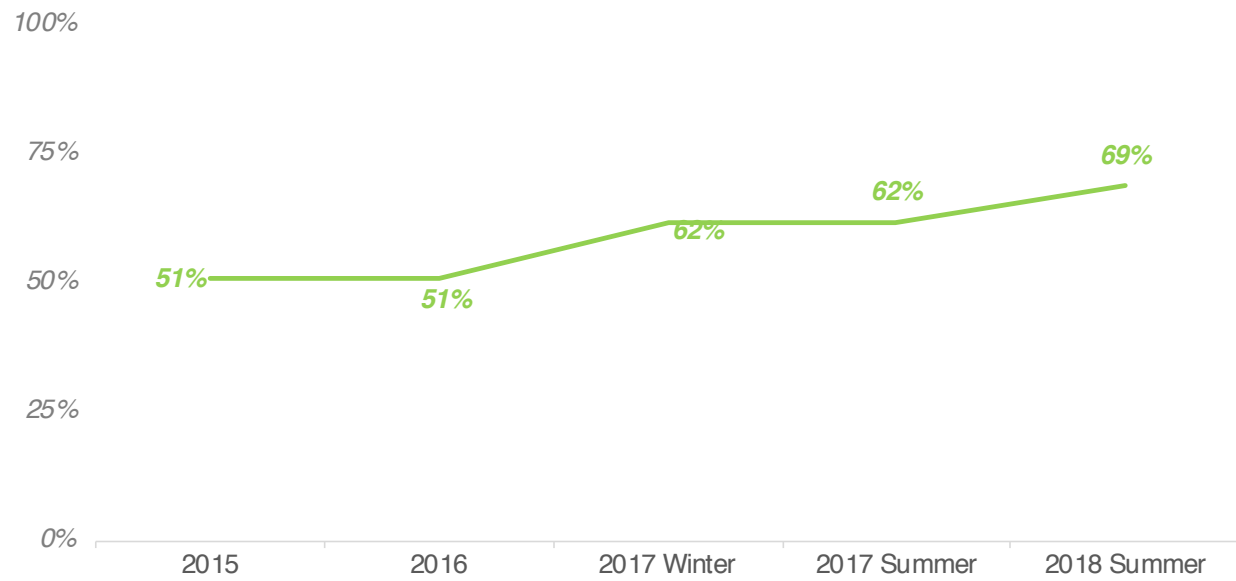
**TYPE OF INFORMATION PREFERRED TO SEE DISPLAYED  
WITH WATERMELON AT A RETAIL STORE**



Source: What type of information would you like to see displayed with watermelon at the retail store?



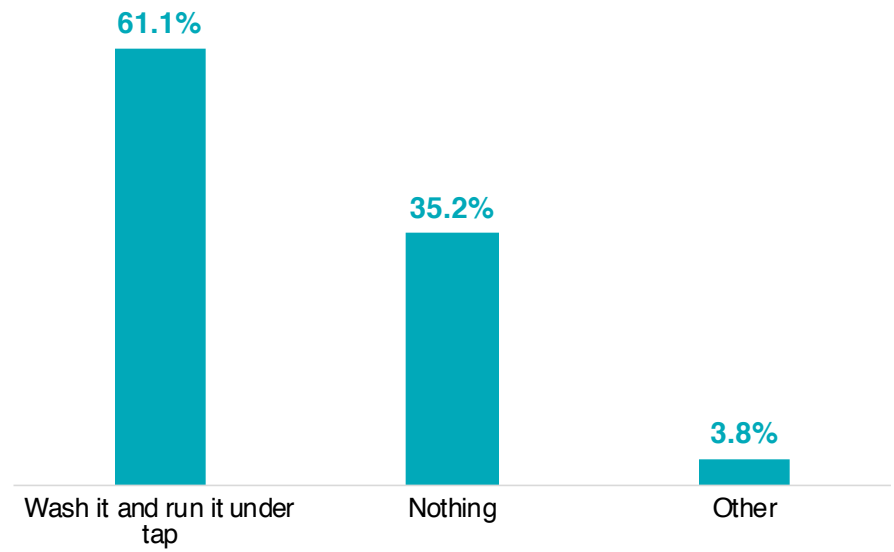
**PERCENT SAYING YES TO KNOWING HOW TO PICK A WATERMELON**



Source: Do you know how to pick a good watermelon?

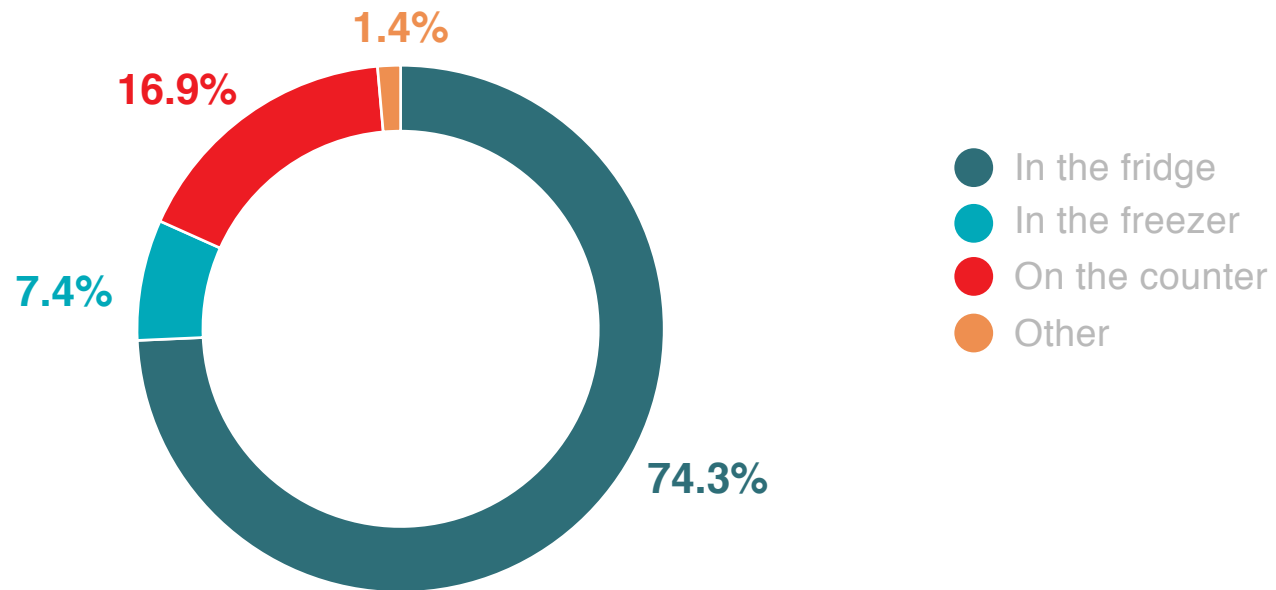


### HOW WATERMELON IS HANDLED BEFORE CONSUMPTION



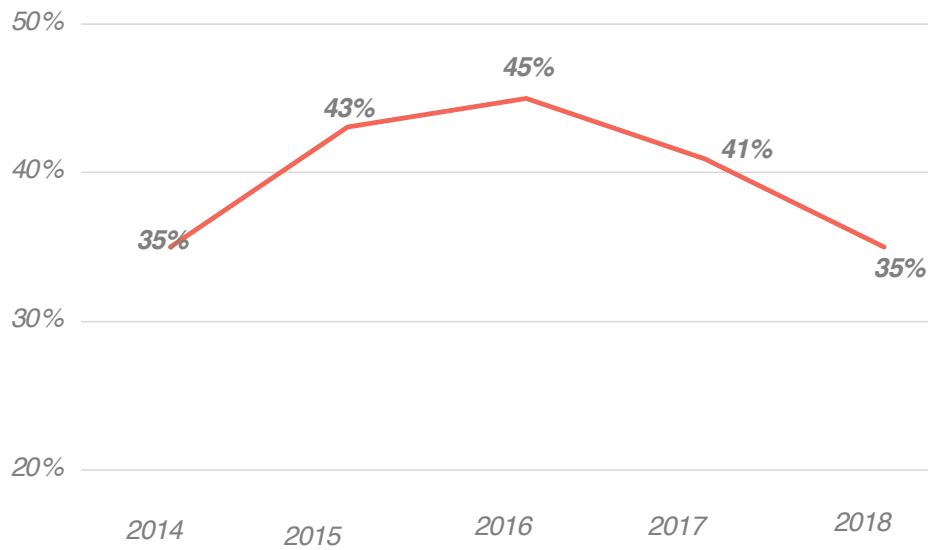
Source: What do you do with your watermelon before you consume it?

### STORAGE OF WATERMELON

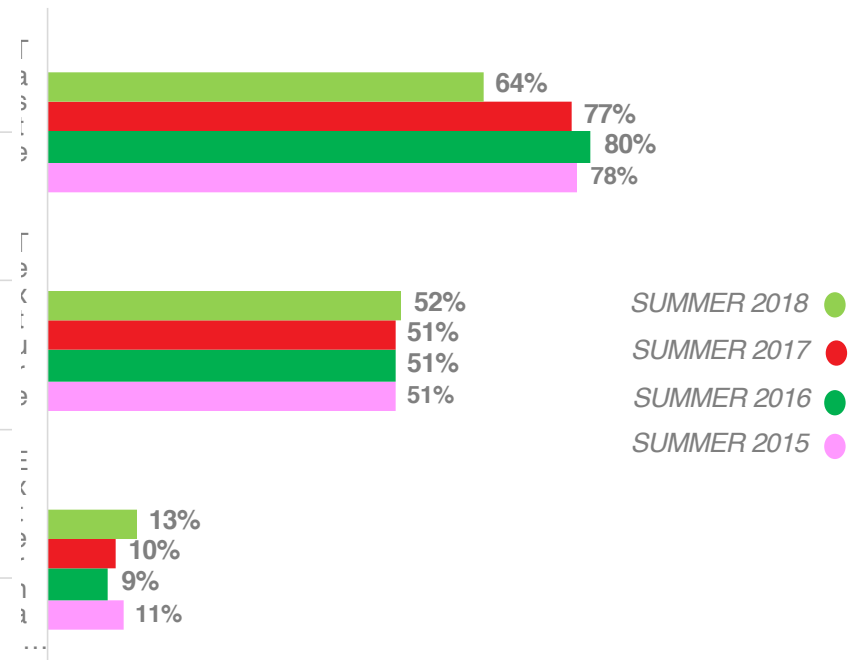


Source: How do you store your watermelon?

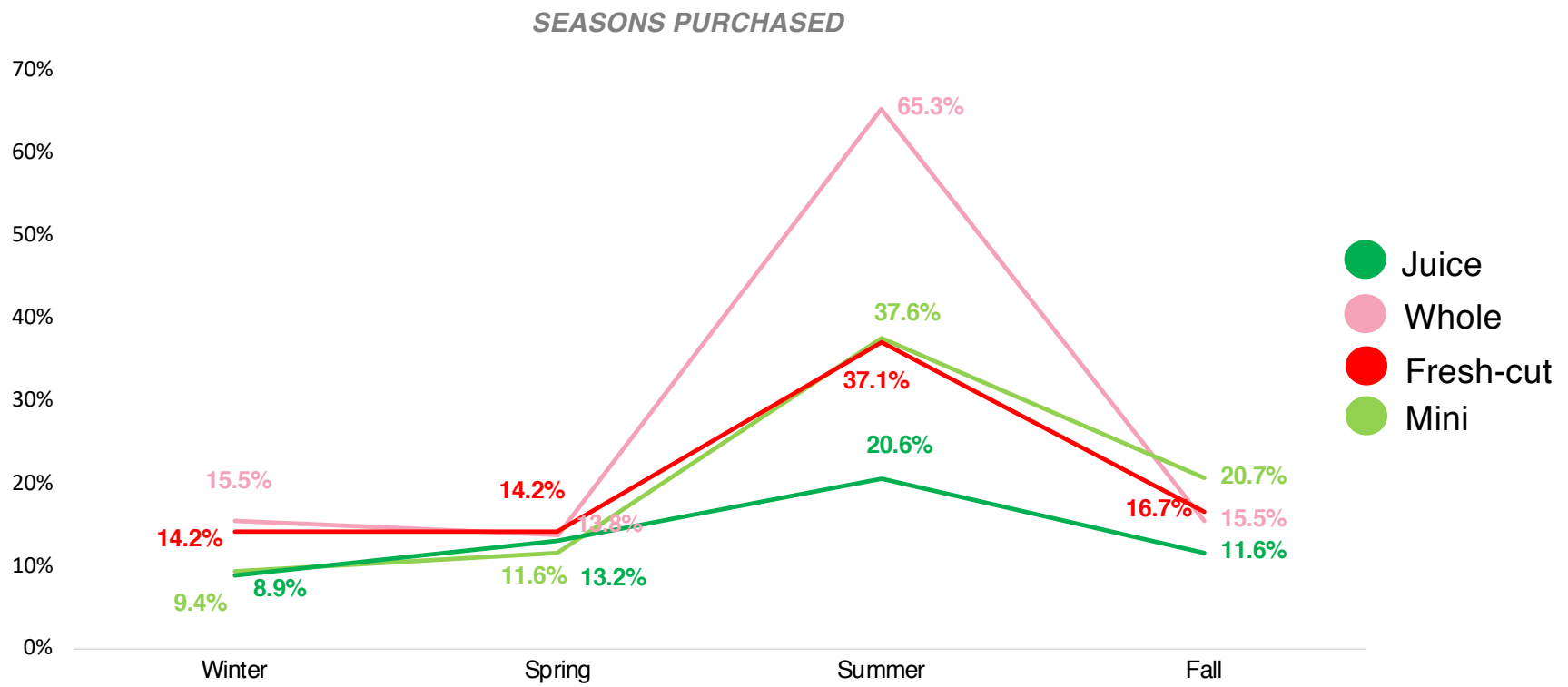
**PERCENT INDICATING PROBLEMS WITH WATERMELON PURCHASE**



**ISSUES WITH WATERMELON QUALITY**

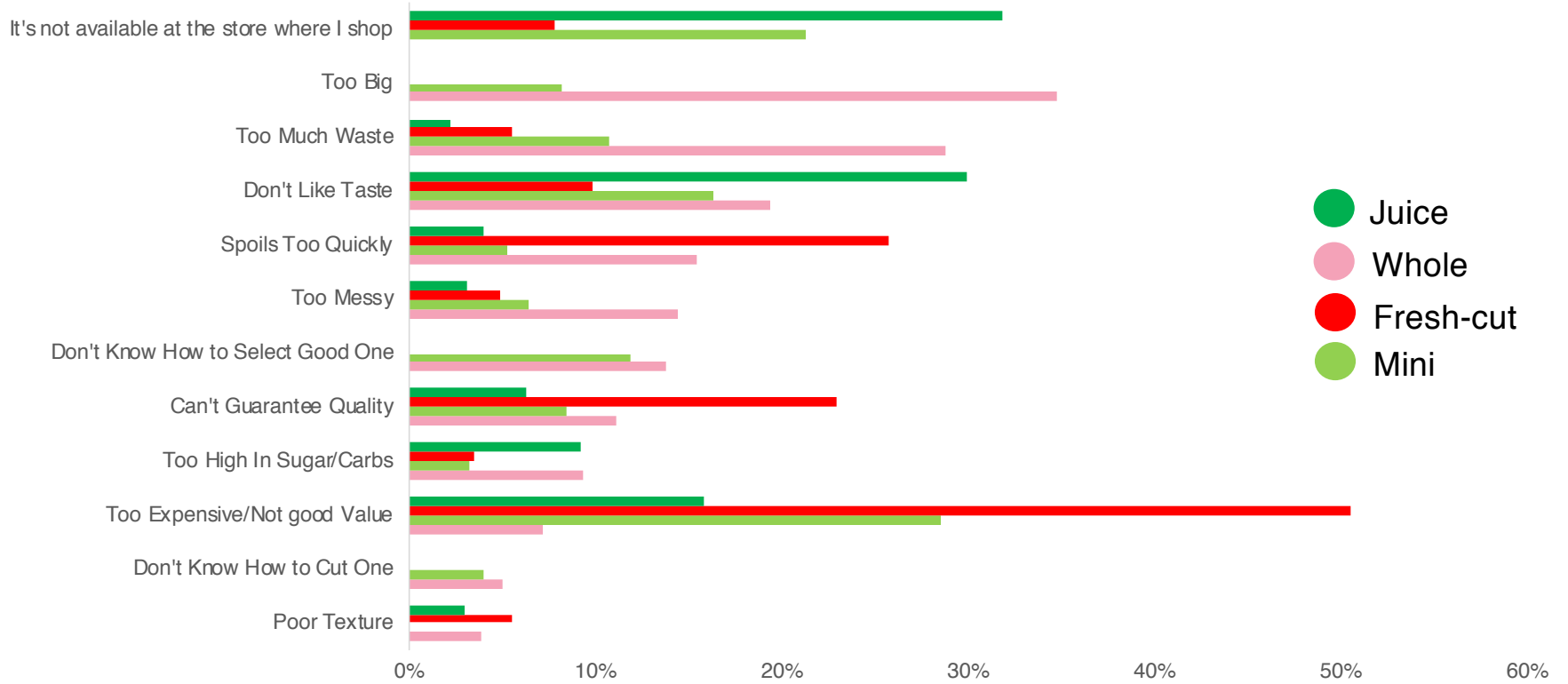


Source: Have you ever had a problem with the quality of watermelon that you've purchased?  
Which of the following describes your watermelon quality issue?



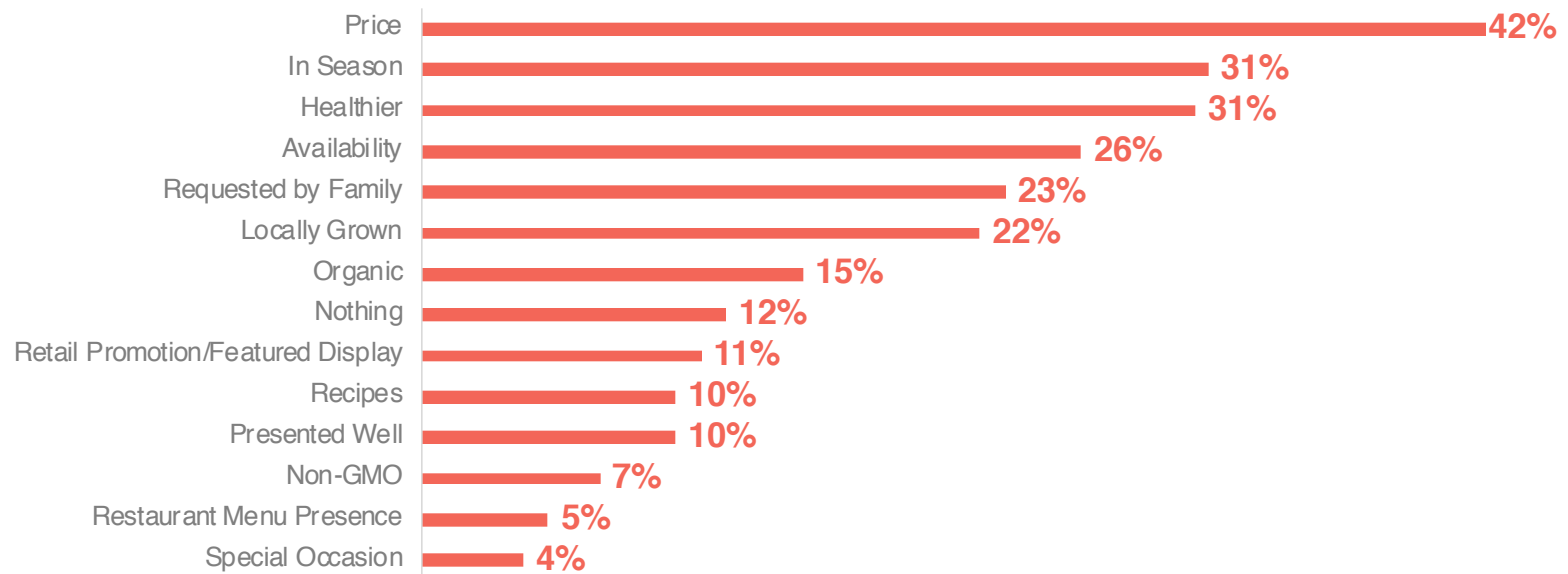
Source: Please select the seasons in which you purchase each type of watermelon

**REASONS WHY DO NOT PURCHASE**



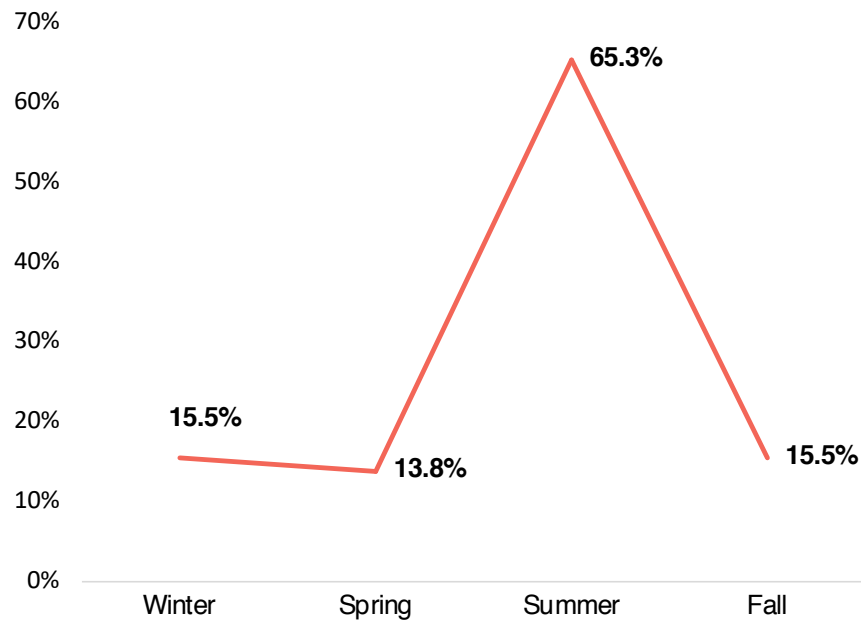
Source: Please explain why you do not purchase:

### ENCOURAGE TO EAT MORE WATERMELON

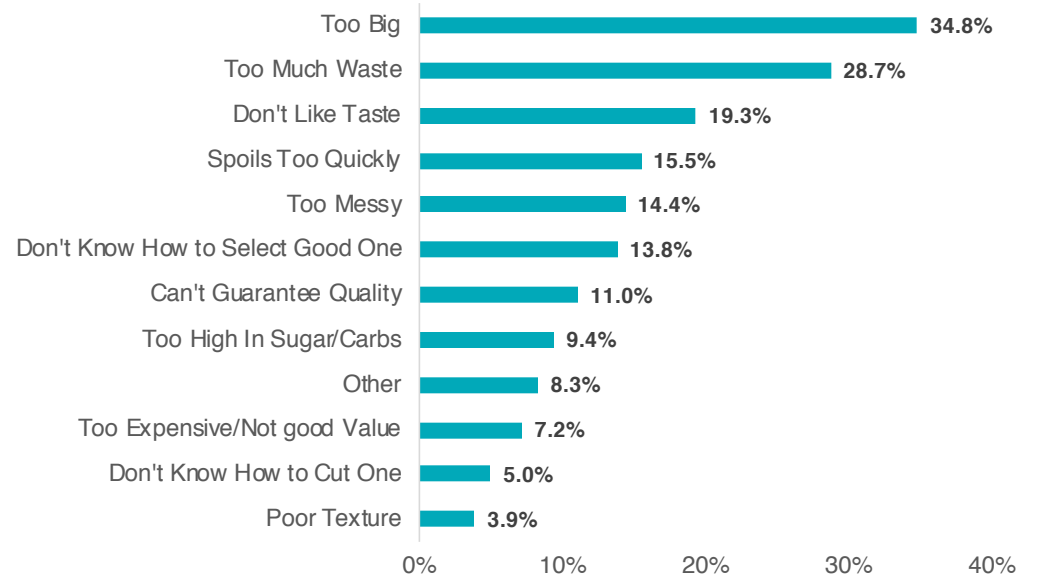


Source: What might encourage you to purchase more watermelon?

**WHOLE WATERMELON**



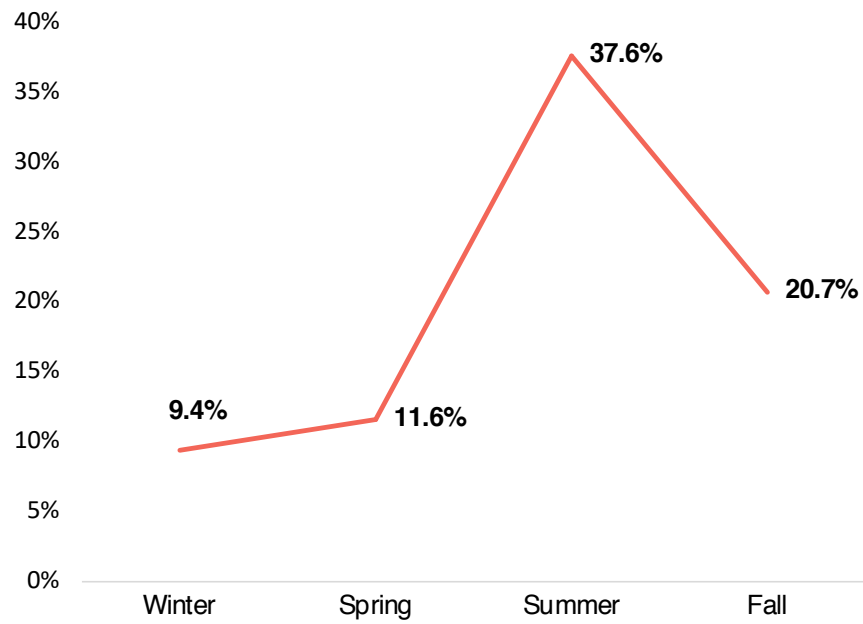
**REASONS WHY DO NOT PURCHASE LARGE WATERMELON  
(OF THE 12.3% THAT DO NOT PURCHASE)**



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?



**MINI WATERMELON**

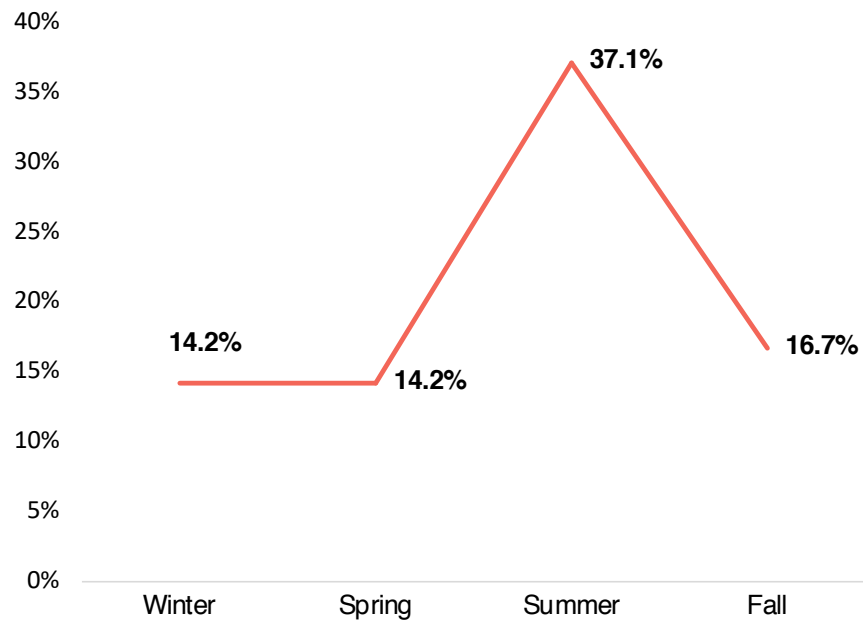


**REASONS WHY DO NOT PURCHASE MINI WATERMELON  
(OF THE 27.3% THAT DO NOT PURCHASE)**

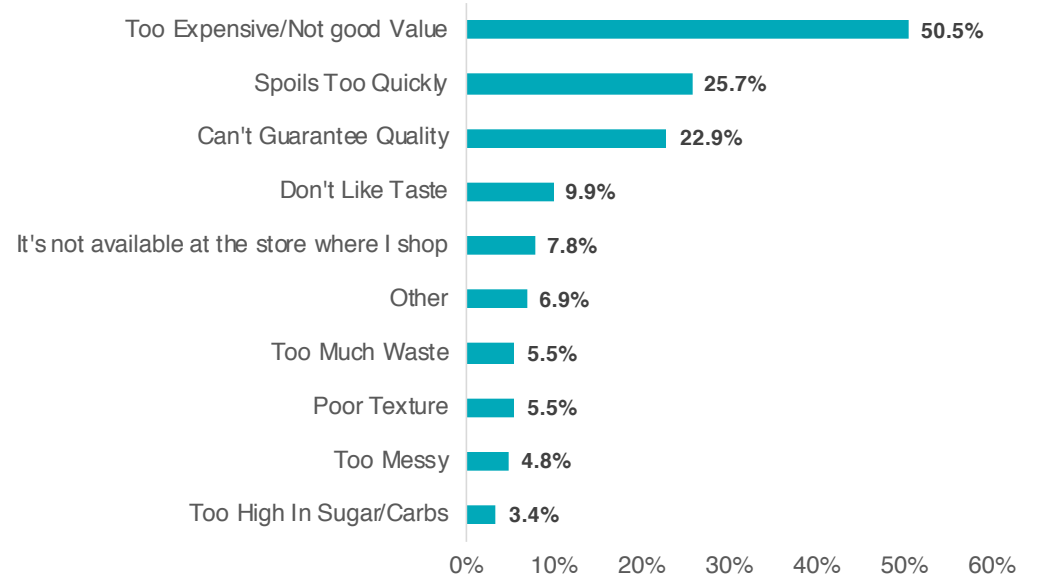


Source: Please select the seasons in which you purchase each type of watermelon  
Please explain why you do not purchase whole miniature watermelon?

**FRESH CUT WATERMELON**

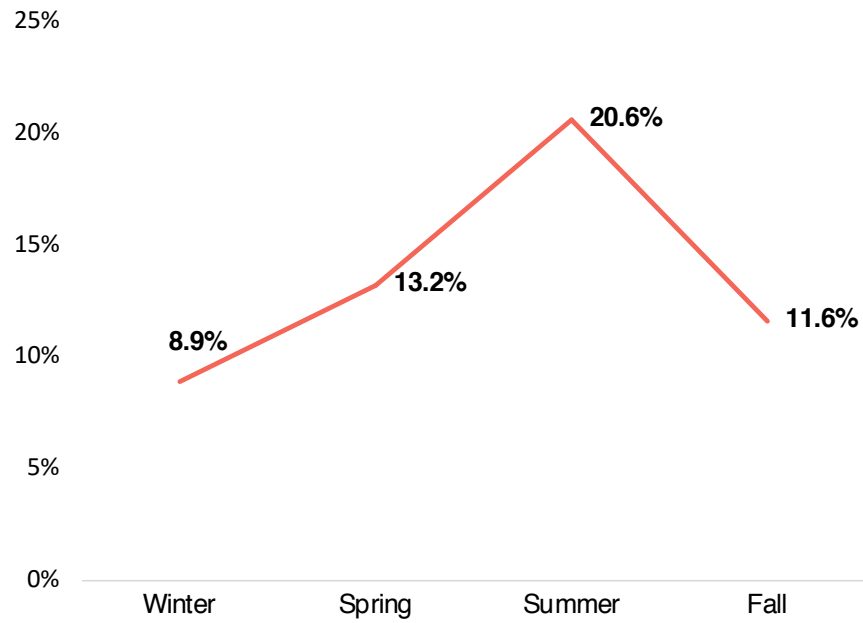


**REASONS WHY DO NOT PURCHASE FRESH CUT WATERMELON (OF THE 29.5% THAT DO NOT PURCHASE)**



Source: Please select the seasons in which you purchase each type of watermelon  
Please explain why you do not purchase fresh cut watermelon?

**WATERMELON JUICE**



**REASONS WHY DO NOT PURCHASE WATERMELON JUICE  
(OF THE 51% THAT DO NOT PURCHASE)**

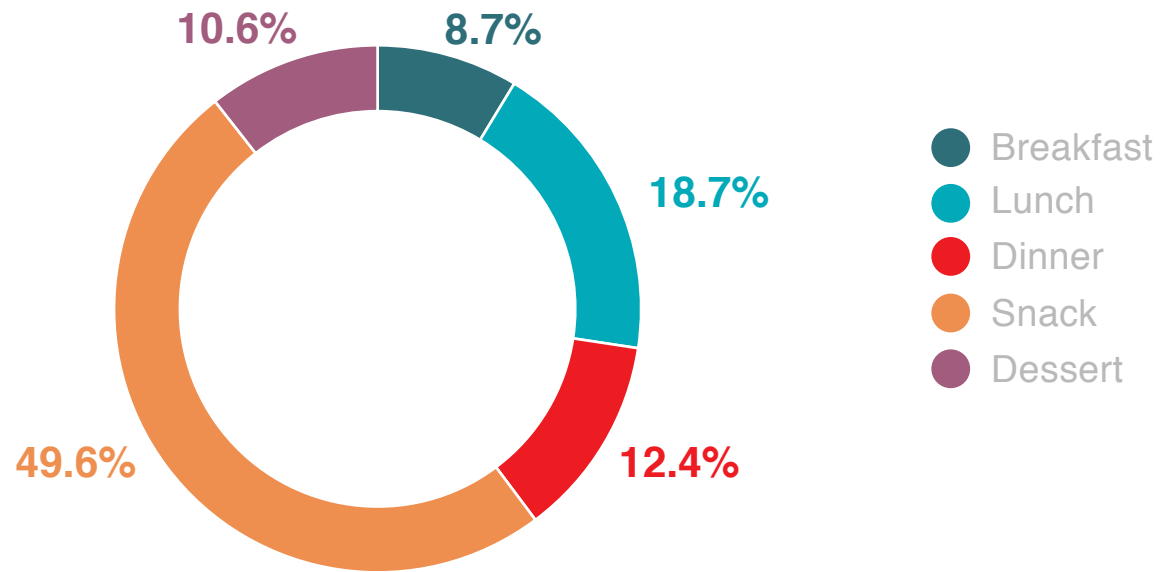


Source: Please select the seasons in which you purchase each type of watermelon  
Please explain why you don't purchase watermelon juice?

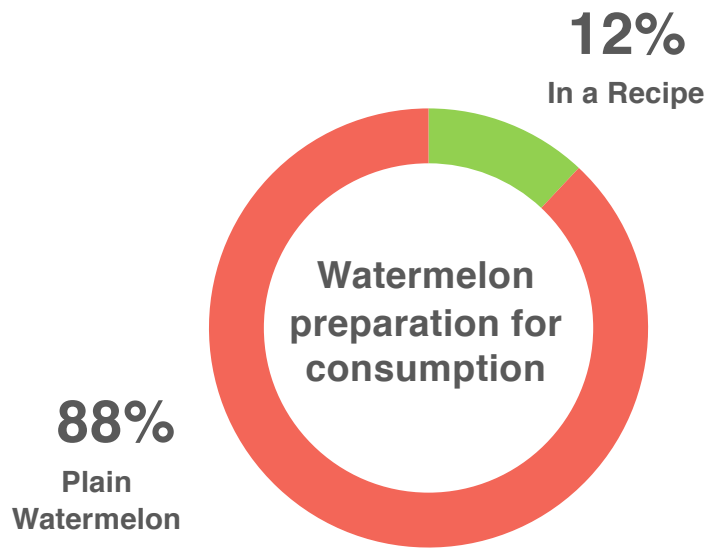


**WATERMELON  
CONSUMPTION**

**TIME OF DAY MAJORITY OF WATERMELON IS EATEN**

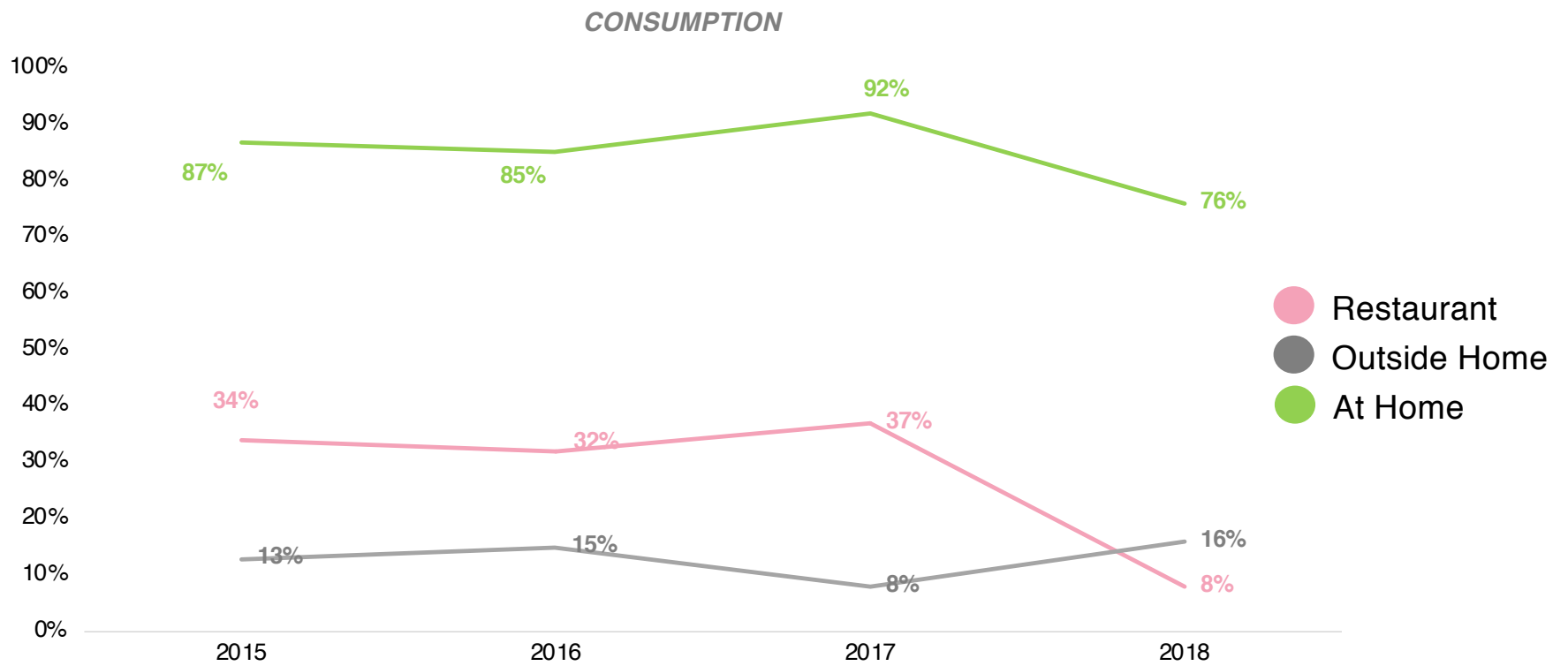


Source: When during the day do you eat the majority of Watermelon?



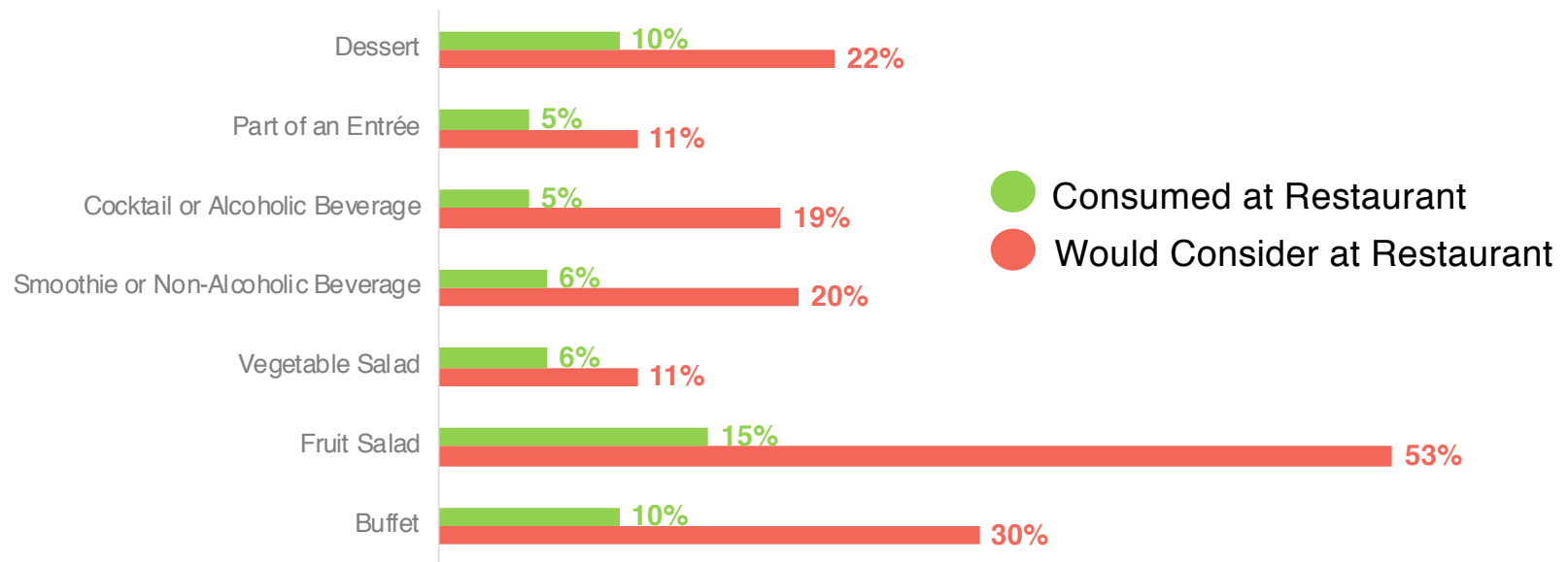
**Most consumers are eating  
plain watermelon at home**

*Source: How do you prepare watermelon for consumption?*



Source: Please select the seasons in which you purchase each type of watermelon

*Restaurant Purchases and Considerations*



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

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