



NATIONAL WATERMELON PROMOTION BOARD

Winter 2019 Consumer Research Findings



AimpointResearch.com

PURPOSE

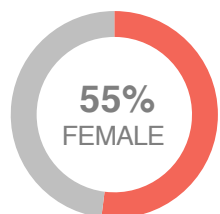
To design and implement a consumer tracking survey to enable the National Watermelon Promotion Board to grow demand

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



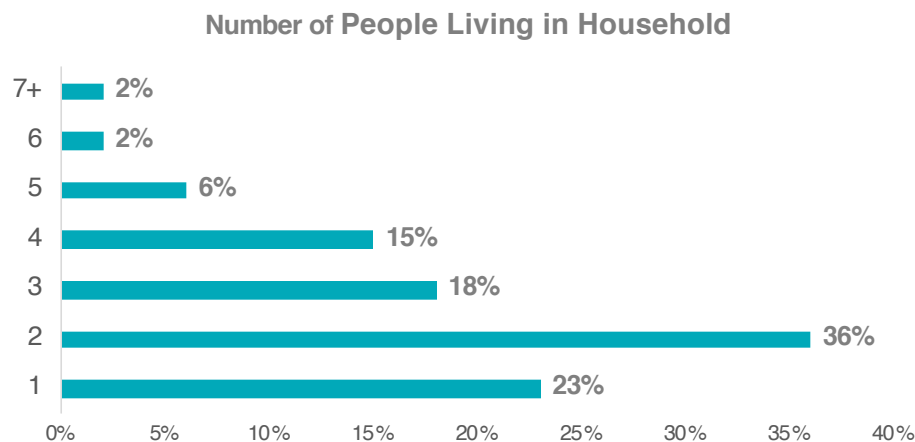
Profile of Respondents 1285 Completes



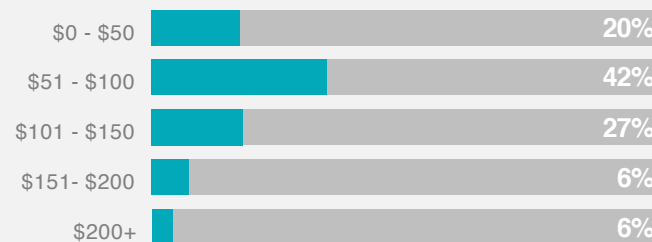
Gender



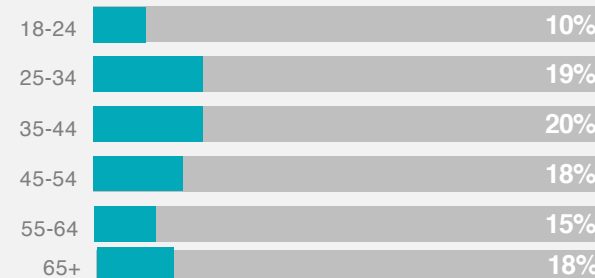
The primary food shopper



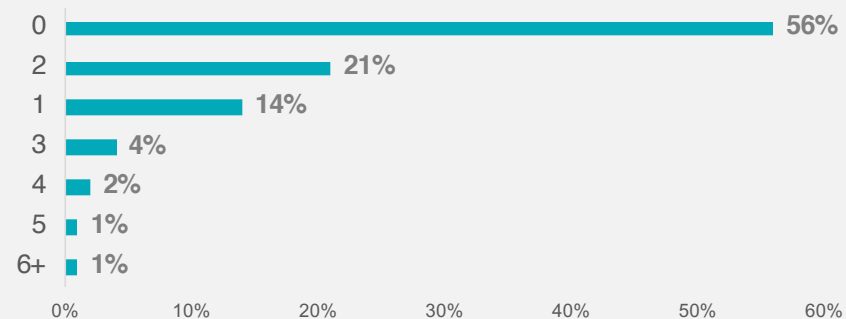
Weekly Grocery Spend



Age

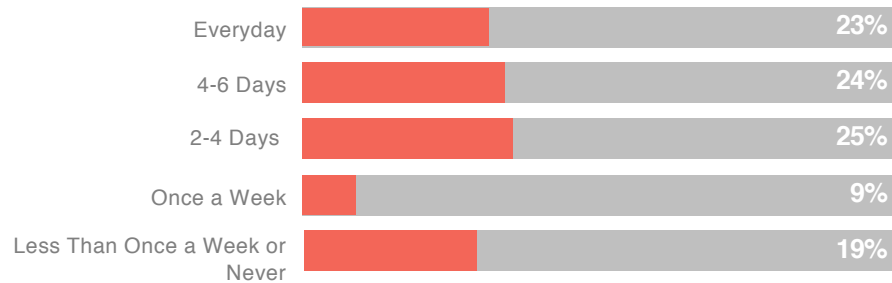


Number of Children Under 18 in House

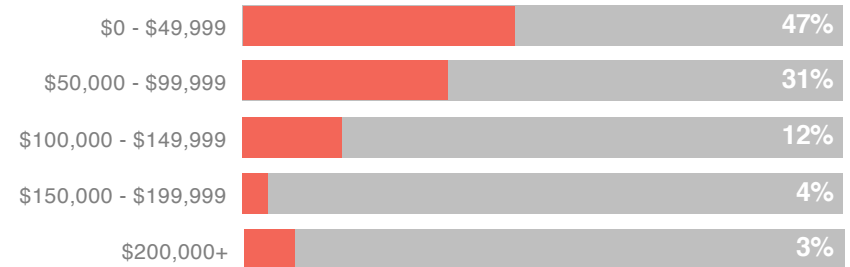


Demographics of Respondents

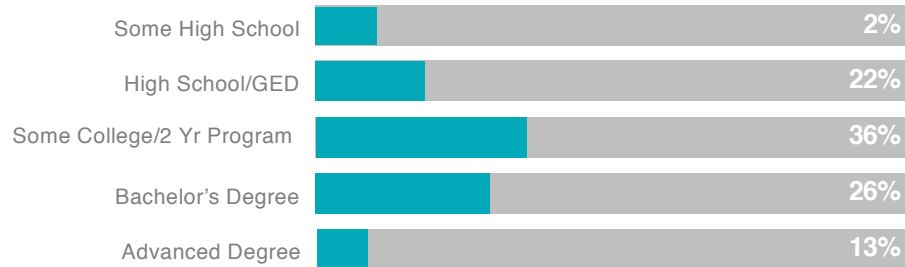
Physical Activity Per Week



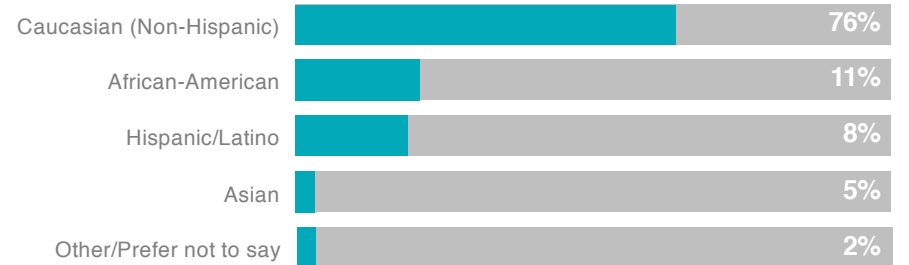
Household Income



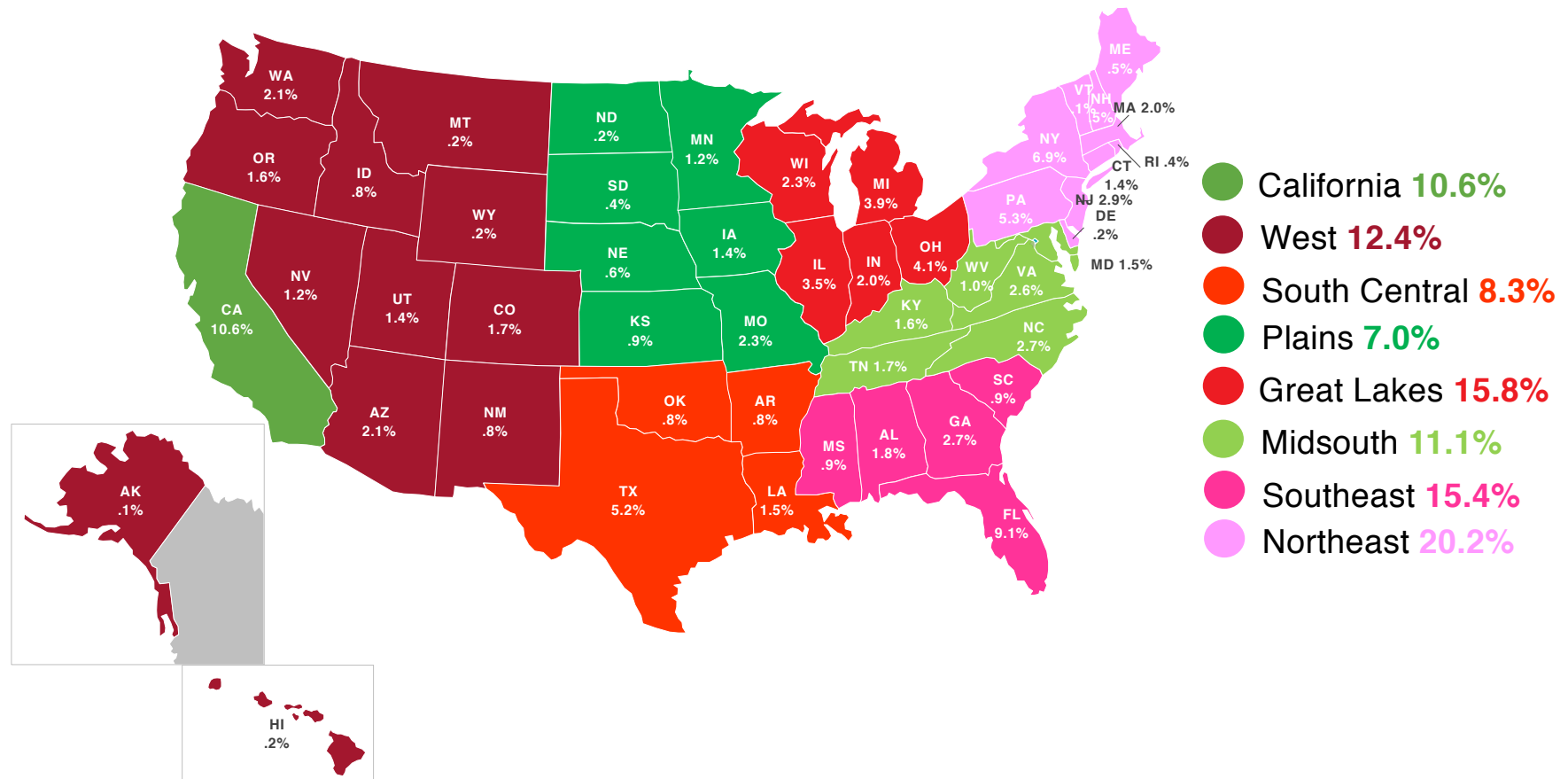
Education Level



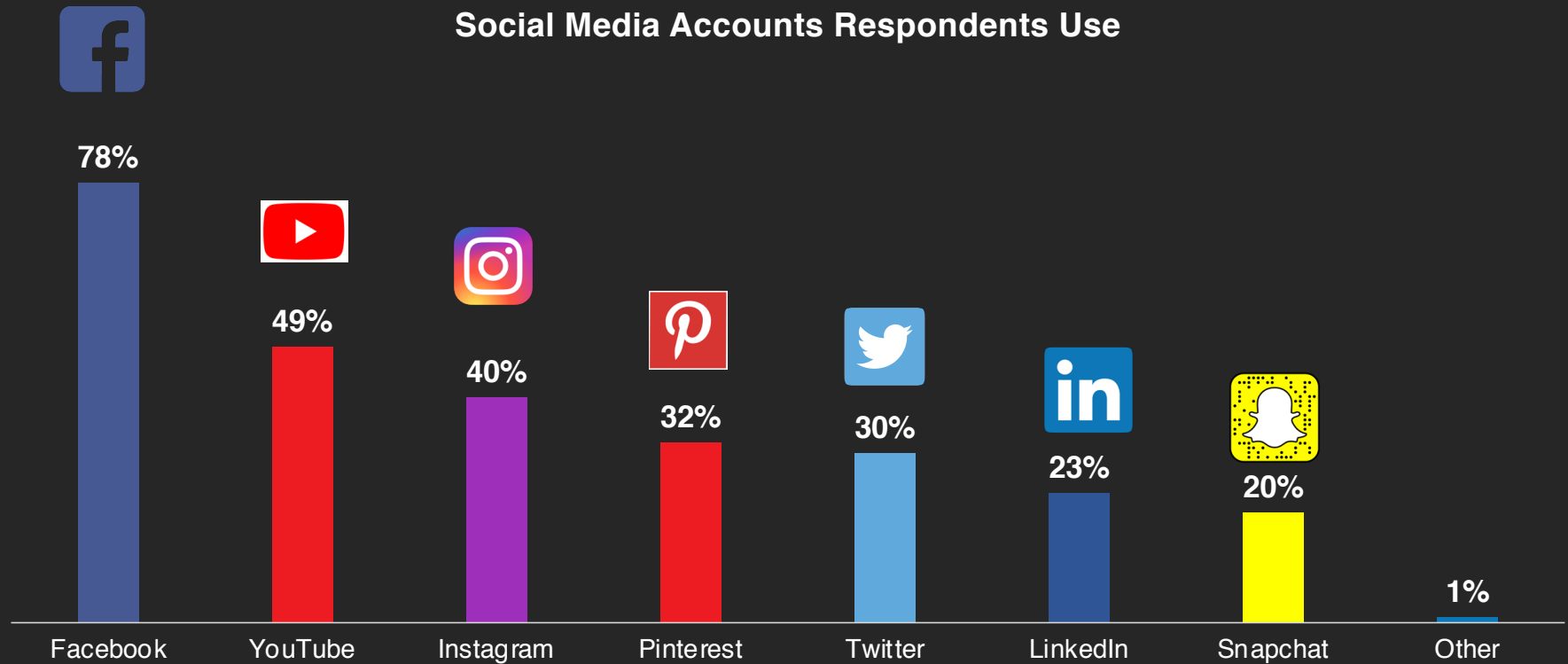
Ethnicity



Demographics of Respondents



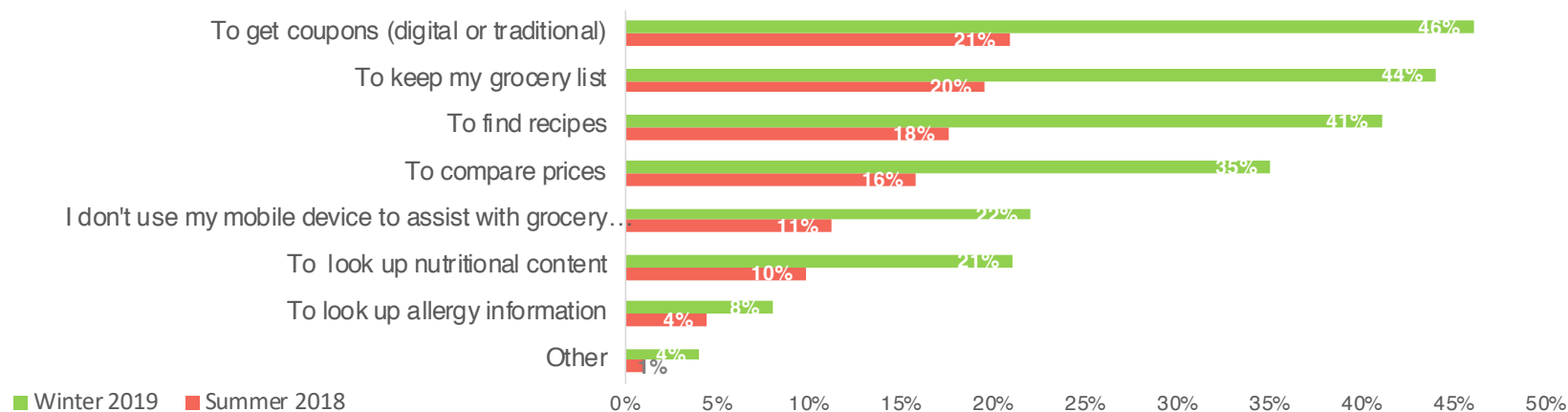
Social Media Accounts Respondents Use



Source: What, if any, of the following social networking websites do you belong to?



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?

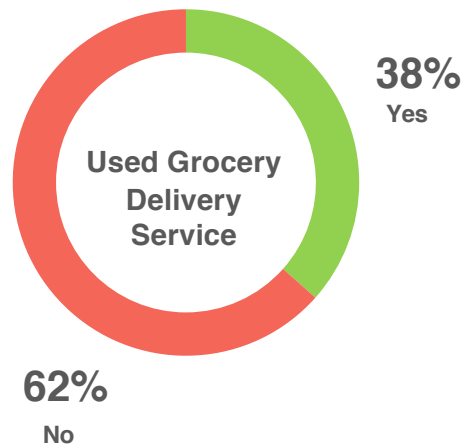
Winter 2019
The question was altered to allow respondents to select more than one option



Summer 2018



Winter 2019



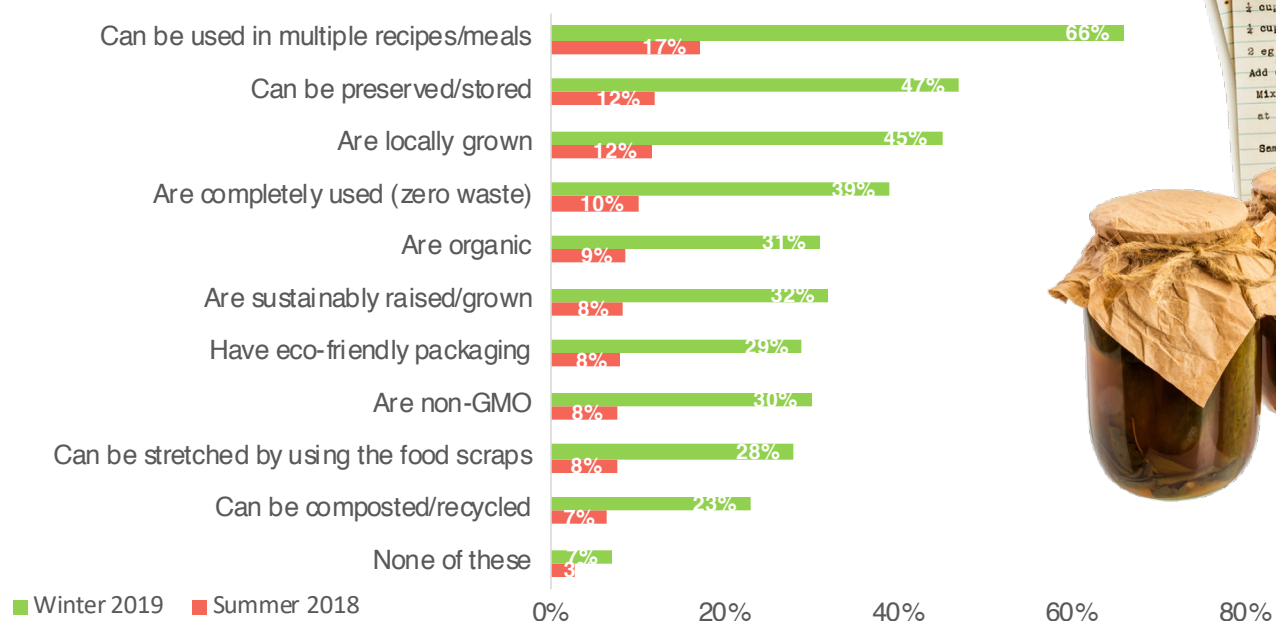
A little over a third of consumers have used non-traditional grocery shopping methods.

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?

A photograph of two glass mason jars filled with a red watermelon smoothie. Each jar is topped with chunks of watermelon and a slice of cucumber. A pink straw is in the left jar, and an orange straw is in the right jar. In the background, a large slice of watermelon with black seeds sits on a dark wooden surface. To the right, a small teal plate holds a honeycomb. The text "FRUIT ATTITUDES & CONSUMPTION" is overlaid in white at the bottom left.

FRUIT ATTITUDES & CONSUMPTION

I feel better when I purchase food that:



Winter 2019

The question was altered to allow respondents to select more than one option

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

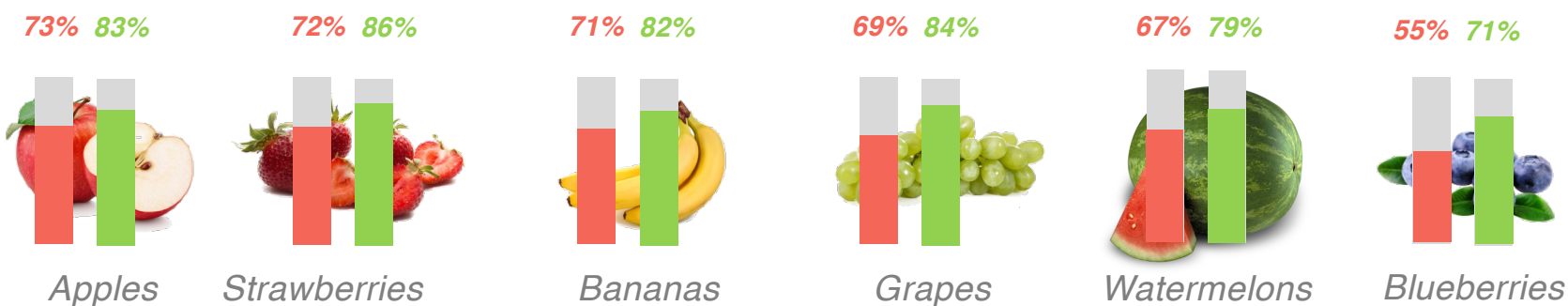


I feel better when I purchase food that:

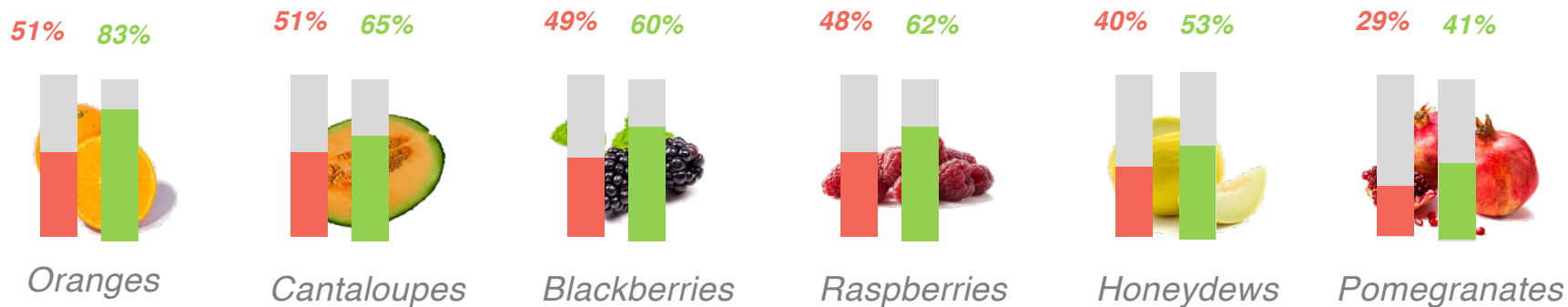


Source: I feel better when I purchase food that is:

PERCENT OF PEOPLE THAT LIKE THE TASTE OF ...



■ Winter 2019 ■ Summer 2018



Source: I enjoy the taste of:

Freshness Rankings
Summer 2018

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

Freshness Rankings
Winter 2019

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



#1 APPLE



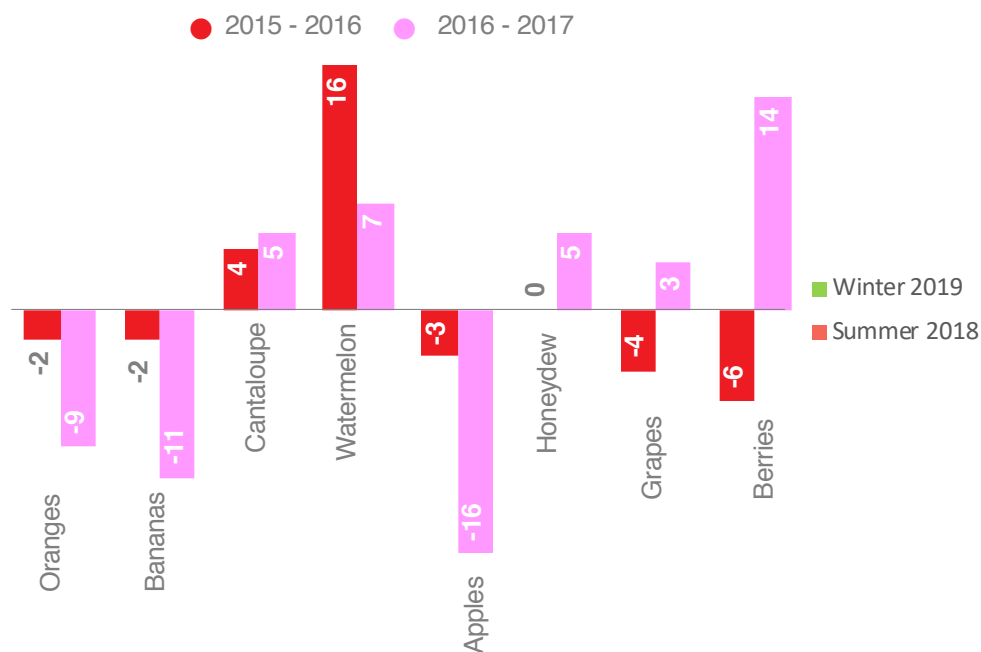
#2 ORANGES



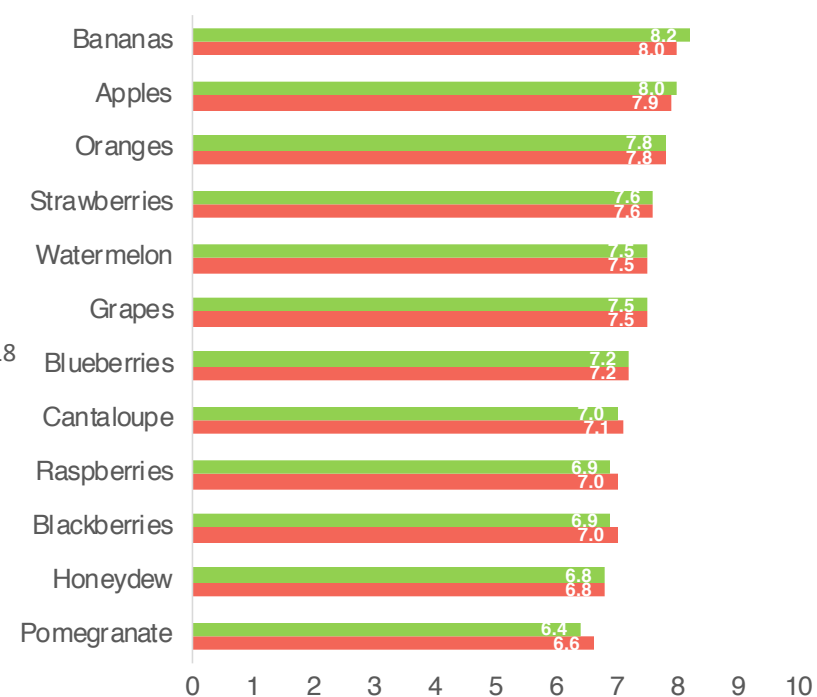
#3 WATERMELON

RANKING OF FRUIT BY VALUE

Percentage Point Gain YOY



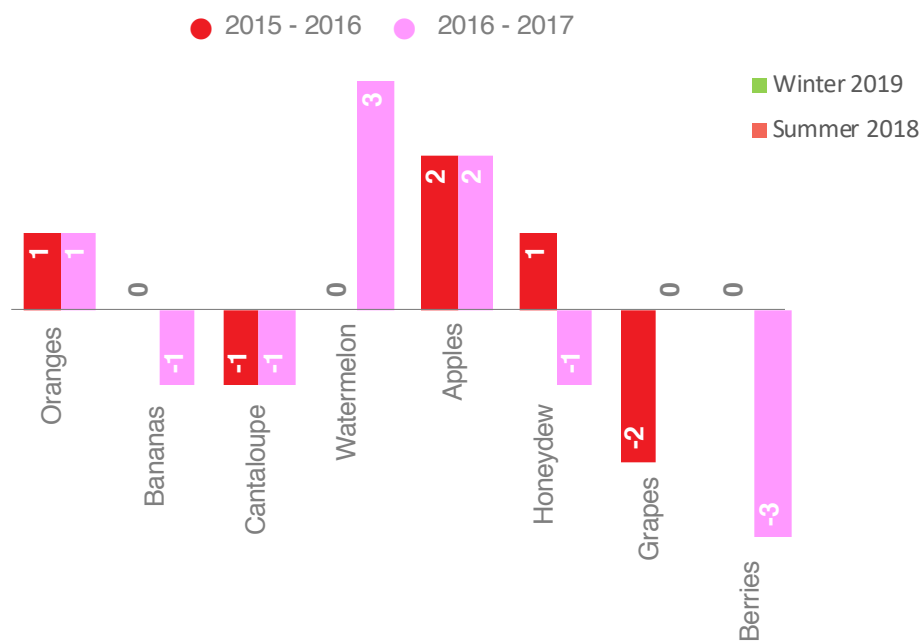
RATING OF FRUITS IN TERMS OF VALUE ON 0 – 10 SCALE



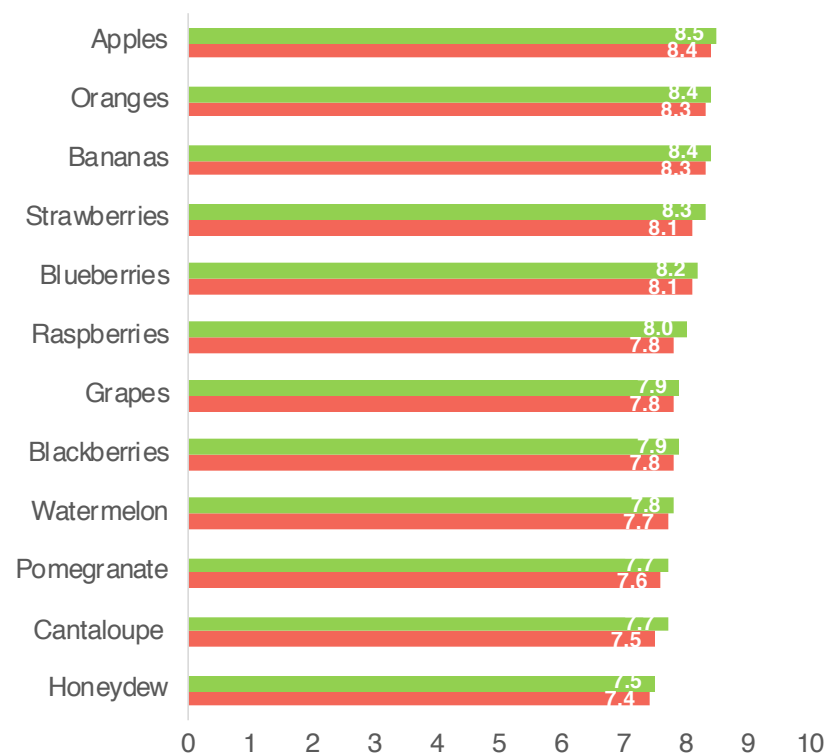
Please rate the following fruits in terms of value.

RANKING OF FRUIT BY HEALTHY AND NUTRITIOUS

Percentage Point Gain YOY



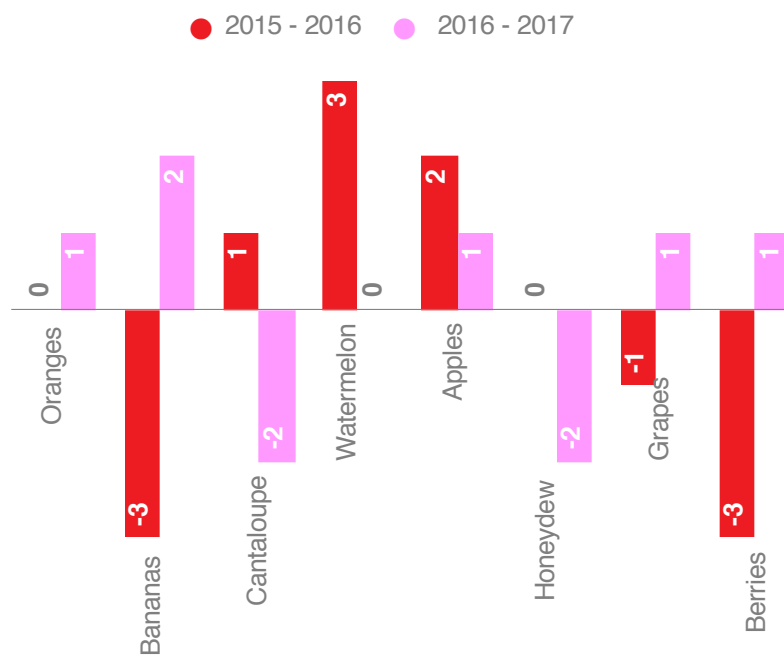
RATING OF FRUIT IN TERMS OF HEALTH, 0 – 10 SCALE



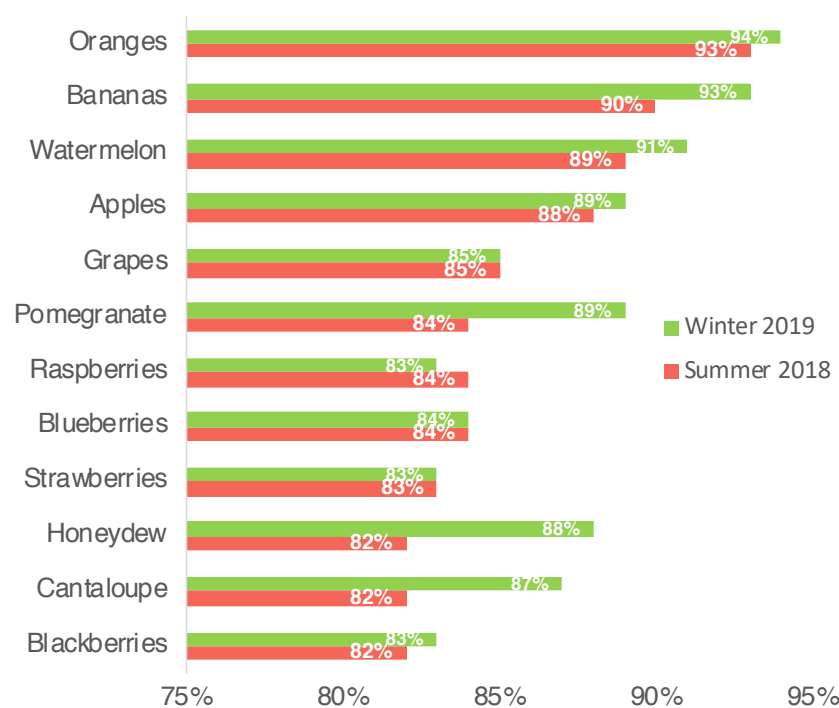
Please rate the following fruits in terms of health.

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.

AGGREGATED RATING OF FRUITS

Fruit	Safe (% generally think)	Healthy (0 – 10)	Value (0 – 10)
Oranges	94%	8.4	7.8
Bananas	93%	8.4	8.2
Watermelon	91%	7.8	7.5
Apples	89%	8.5	8.0
Grapes	85%	7.9	7.5
Blueberries	84%	8.2	7.2
Raspberries	83%	8.0	6.9
Pomegranate	89%	7.7	6.4
Strawberries	83%	8.1	7.6
Blackberries	83%	7.9	6.9
Cantaloupe	87%	7.7	7.0
Honeydew	88%	7.5	6.8

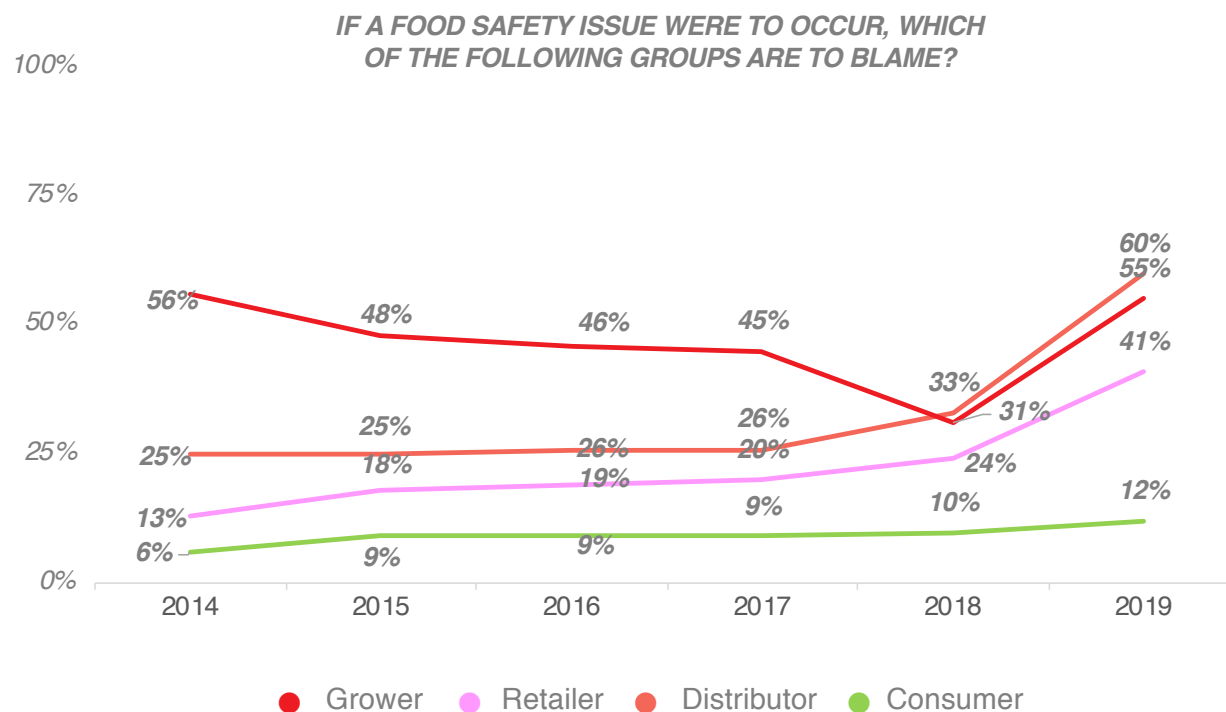
Source: Please rate the following in terms of how healthy you consider them to be using a scale from 0-10 where 0 being not healthy at all and 10 being extremely healthy. Please rate the fruits on how safe you consider them to be. Please rate the following fruits in terms of value.

Summer 2018 Winter 2019















**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,*



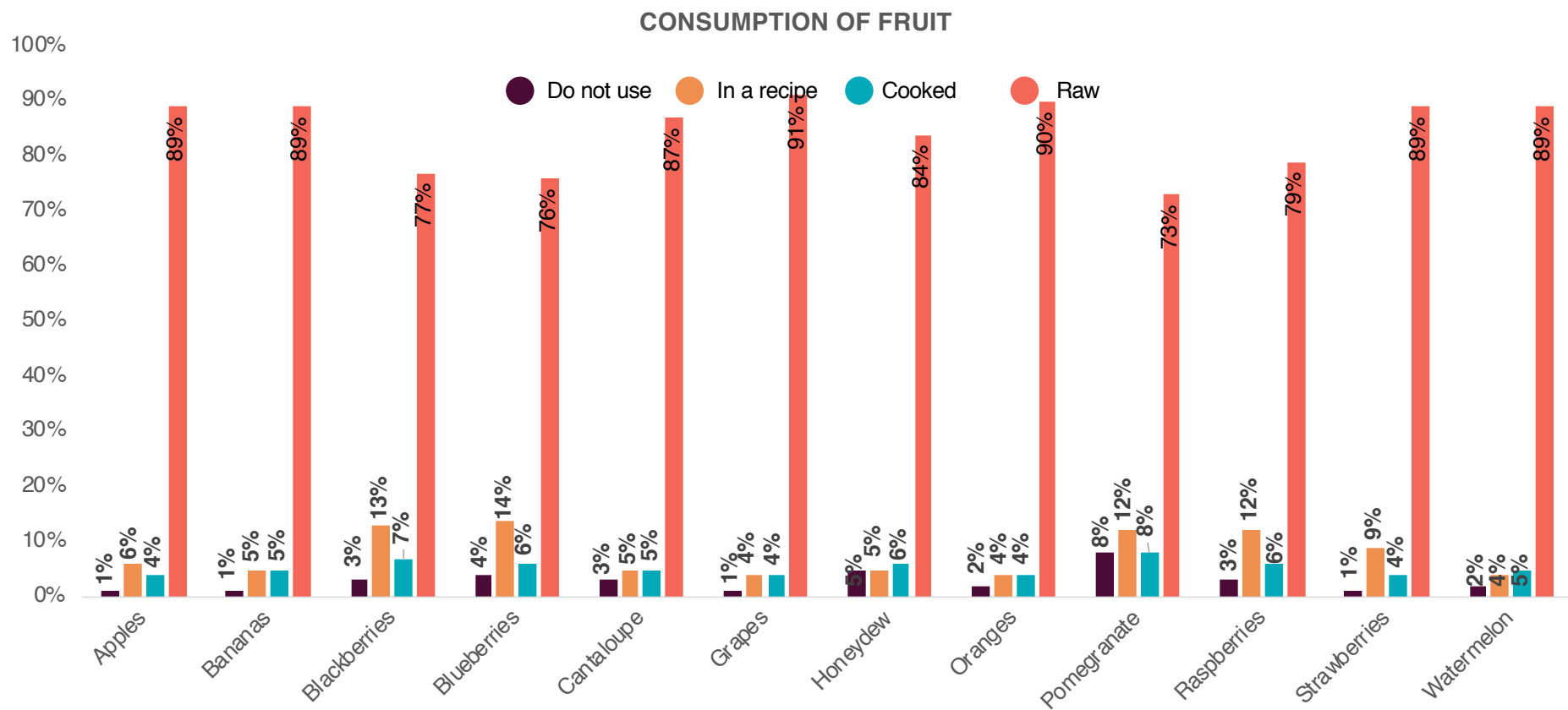
Source: On a scale of 0-10, where 0 is not at all safe and 10 is extremely safe, how safe do you believe produce sold in the United States is for consumers?

PRIMARY PLACE FRUIT IS PURCHASED

		GROCERY STORE	CLUB STORE	FARMER'S MARKET	ROADSIDE STAND	CONVENIENCE STORE
	Apples	79%	7%	8%	3%	4%
	Bananas	81%	6%	5%	2%	5%
	Blackberries	72%	8%	12%	4%	4%
	Blueberries	72%	9%	11%	3%	5%
	Cantaloupe	76%	5%	10%	4%	4%
	Grapes	82%	5%	8%	2%	3%
	Honeydew	73%	6%	1%	4%	4%
	Oranges	79%	6%	7%	4%	4%
	Pomegranate	70%	8%	11%	5%	7%
	Raspberries	72%	8%	12%	3%	5%
	Strawberries	73%	7%	12%	4%	4%
	Watermelon	74%	4%	10%	6%	6%

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")

Bolding/red highlighting indicates the location where the fruit is least purchased, bolding/green highlighting indicates the location where the fruit is most purchased.



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

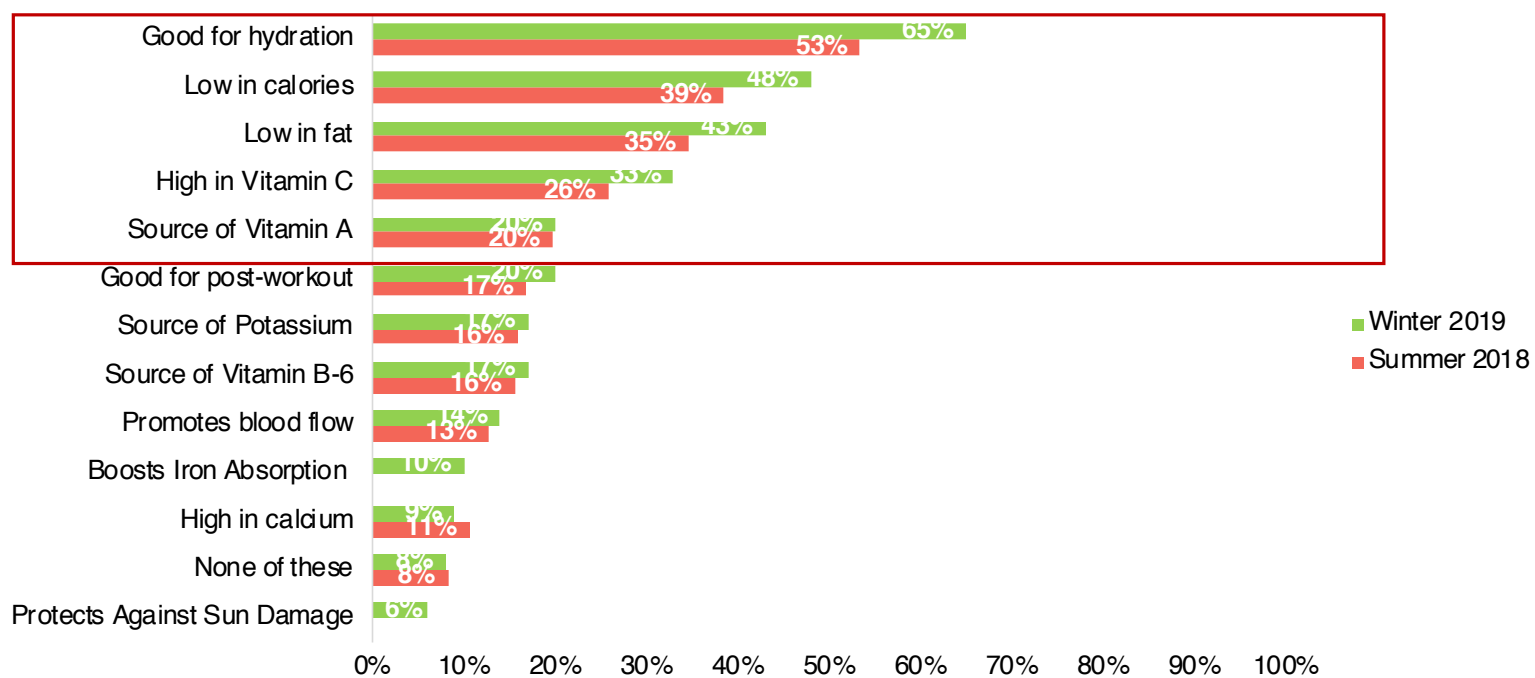


DESCRIPTION OF WATERMELON USING ONE WORD

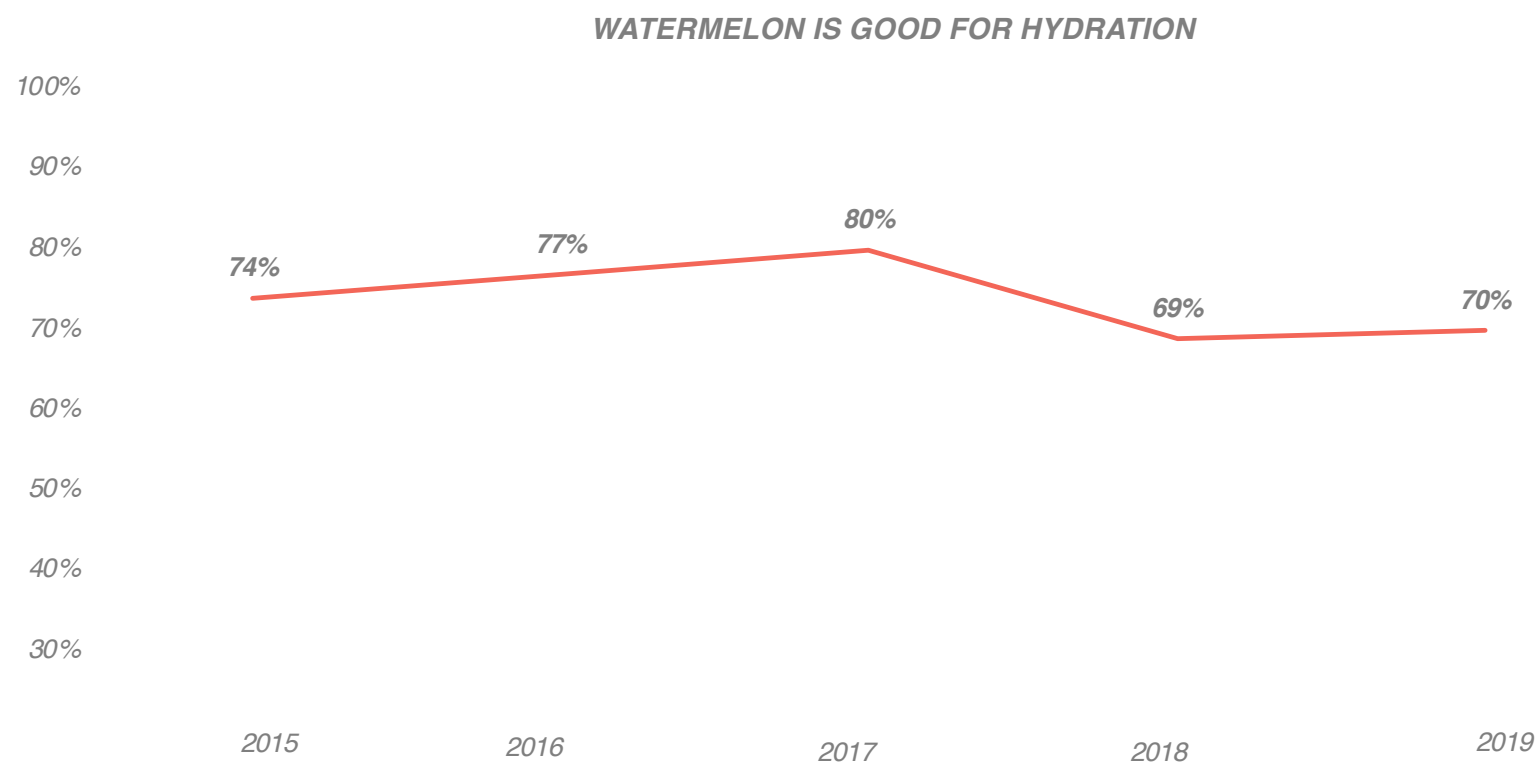


Source: Describe watermelon using one word.

RESPONDENTS UNDERSTANDING OF BENEFITS OF WATERMELON

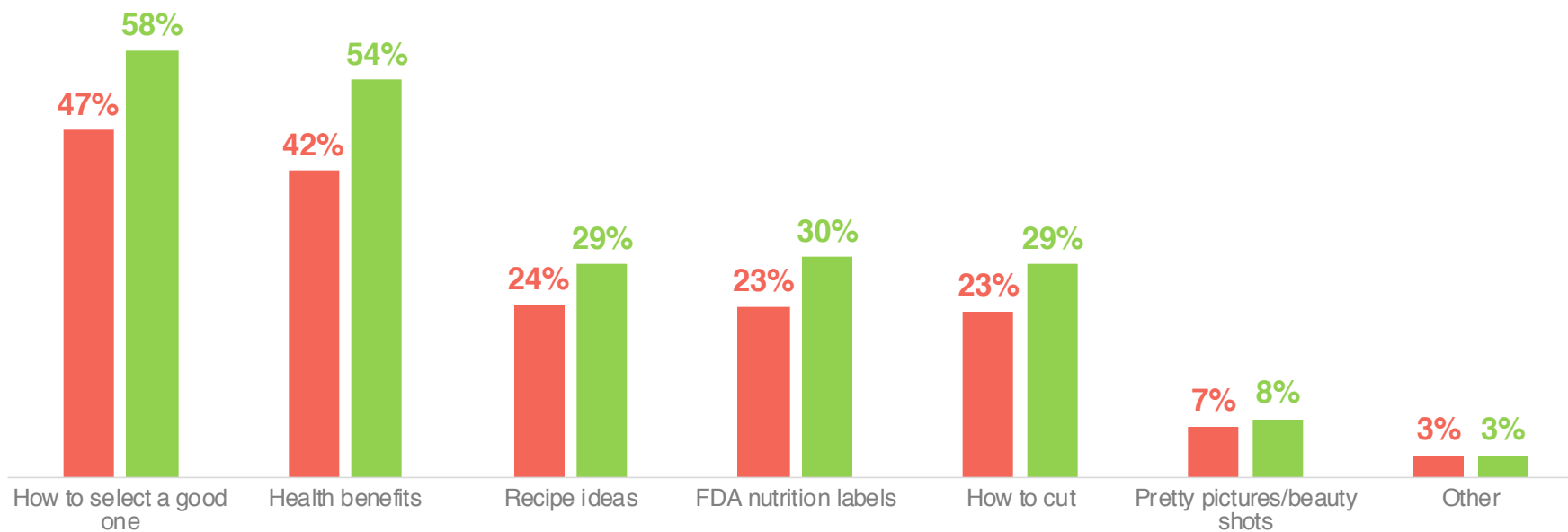


Source: Which of the following statements do you know to be true about watermelon?



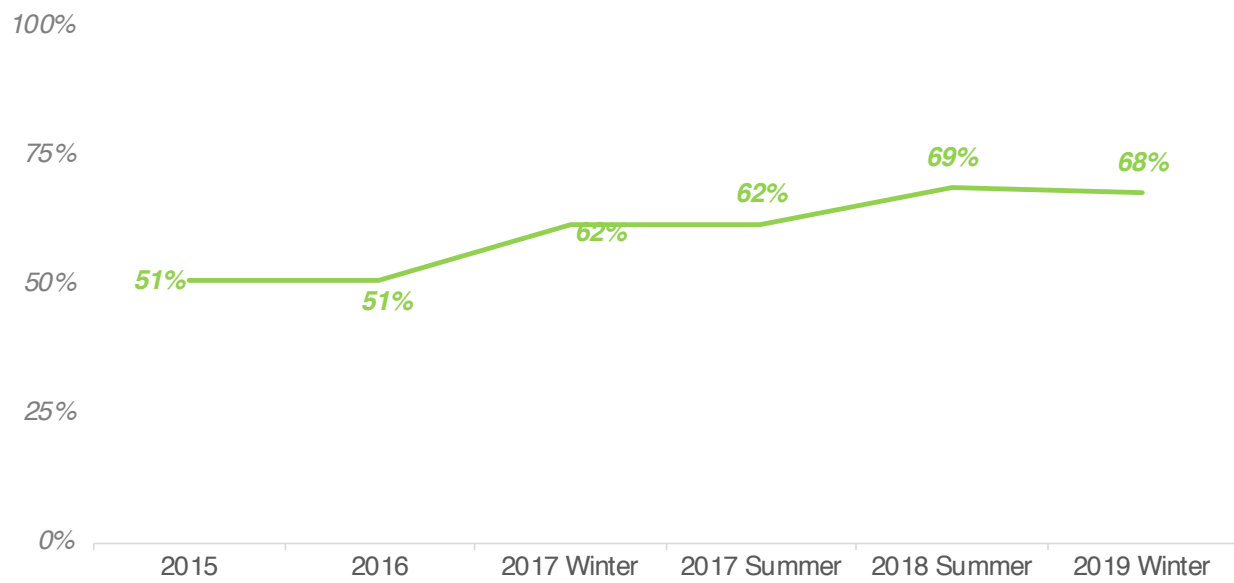
Source: Would knowing that watermelon is good for hydration make you want to purchase (or purchase more) of it in the future?

***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?

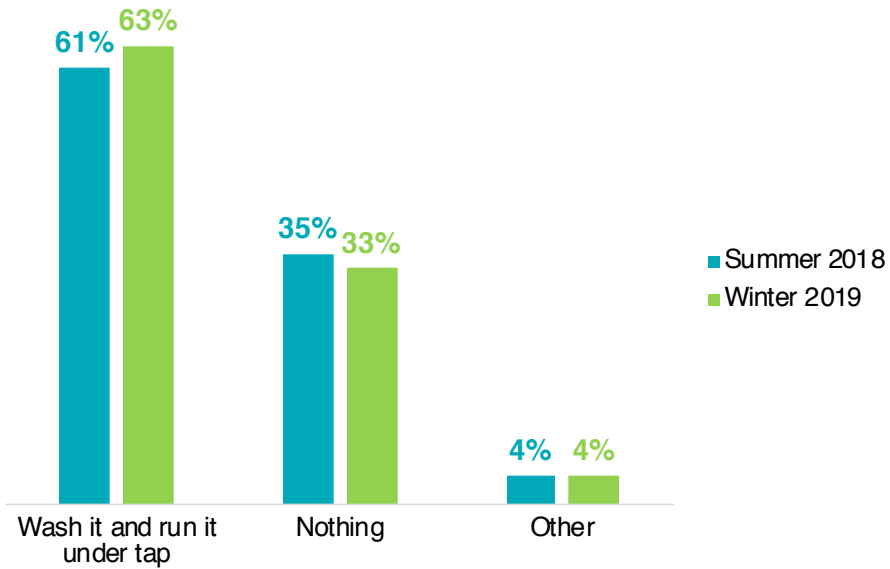
**PERCENT SAYING YES TO KNOWING HOW TO PICK A
WATERMELON**



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

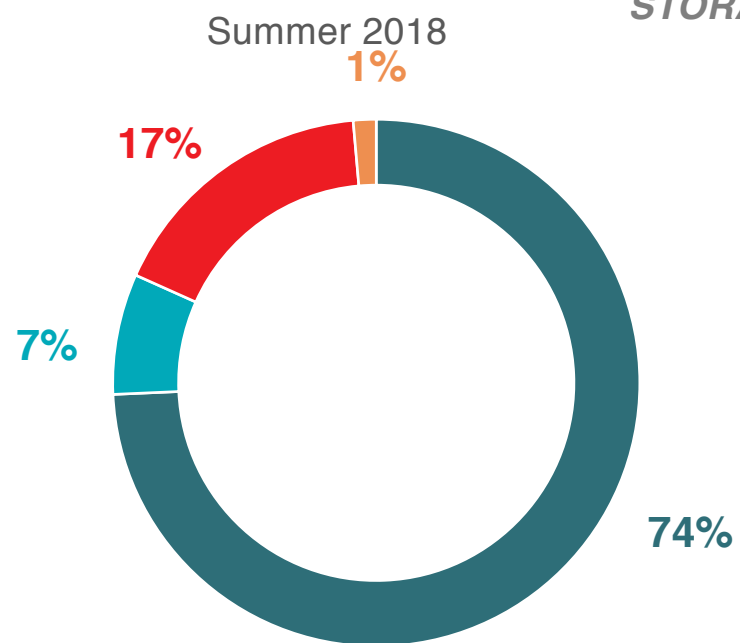


**HOW WATERMELON IS HANDLED
BEFORE CONSUMPTION**

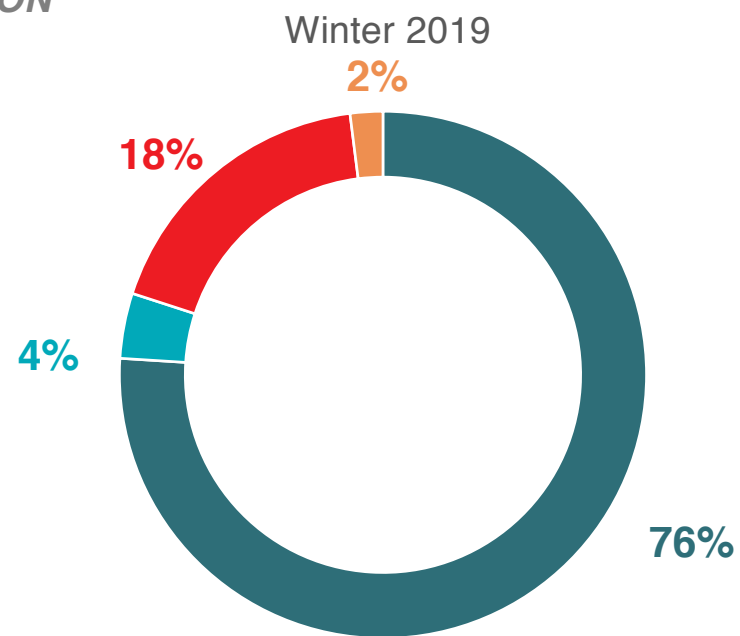


Source: What do you do with your watermelon before you consume it?

STORAGE OF WATERMELON

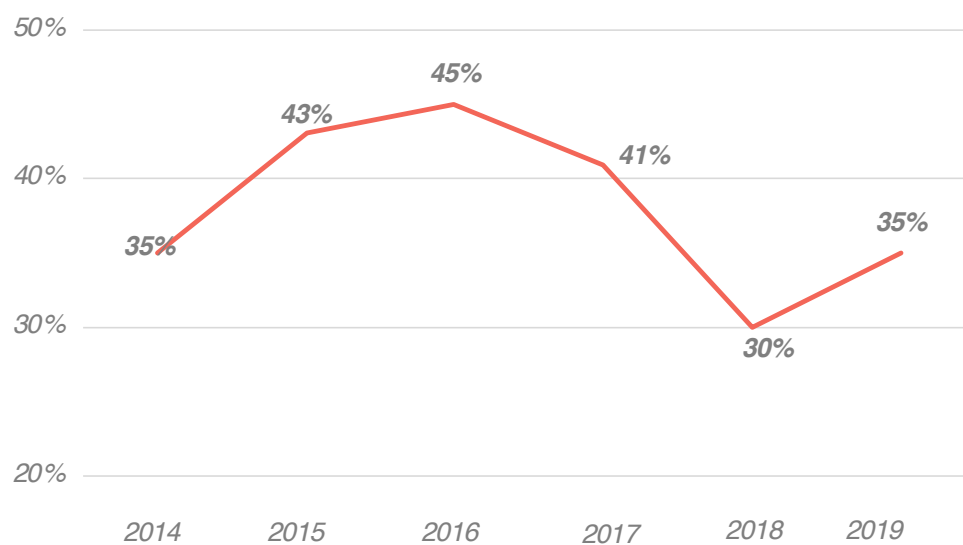


- In the fridge
- In the freezer
- On the counter
- Other

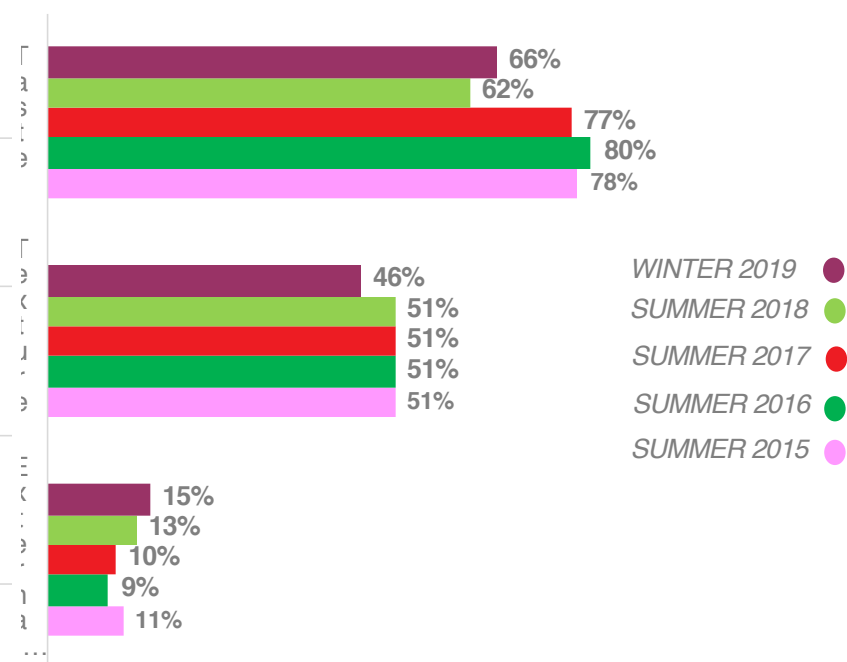


Source: How do you store your watermelon?

PERCENT INDICATING PROBLEMS WITH WATERMELON PURCHASE

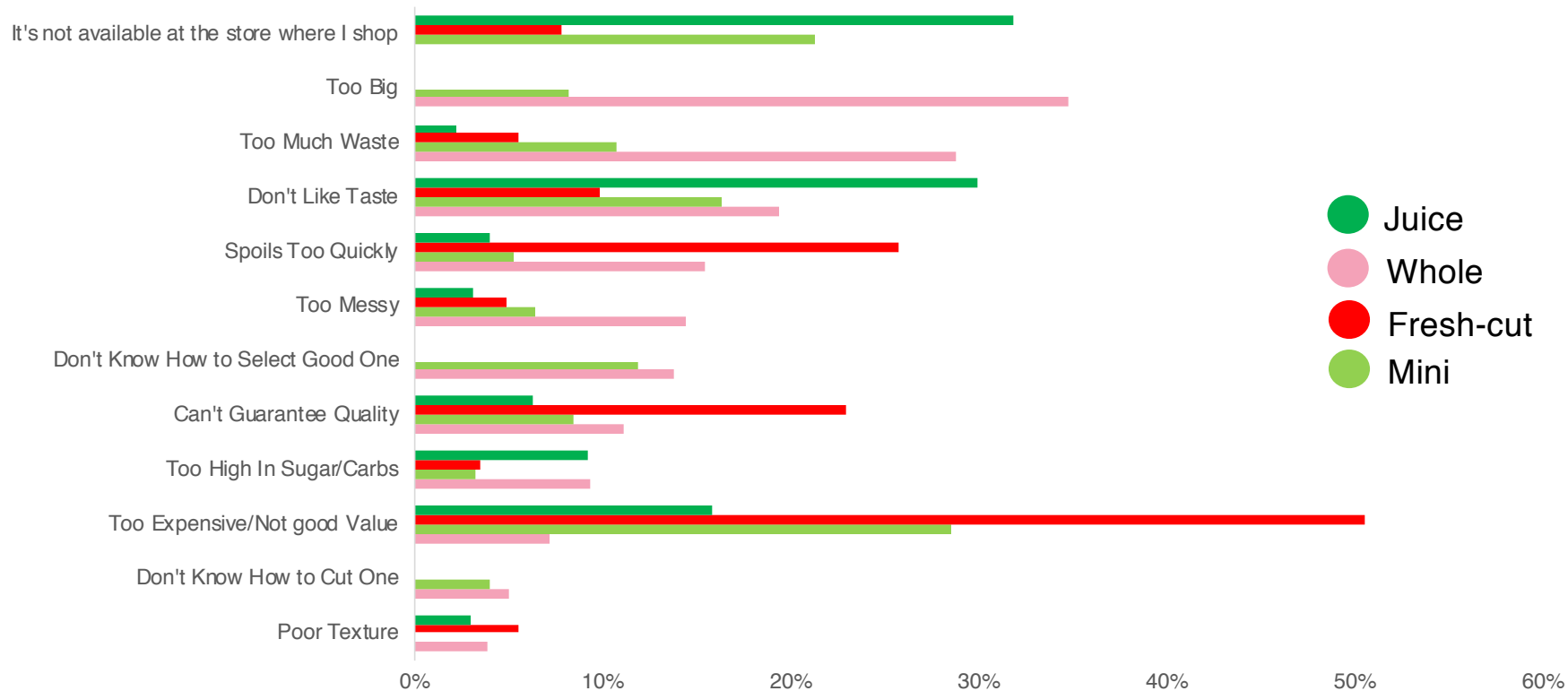


ISSUES WITH WATERMELON QUALITY

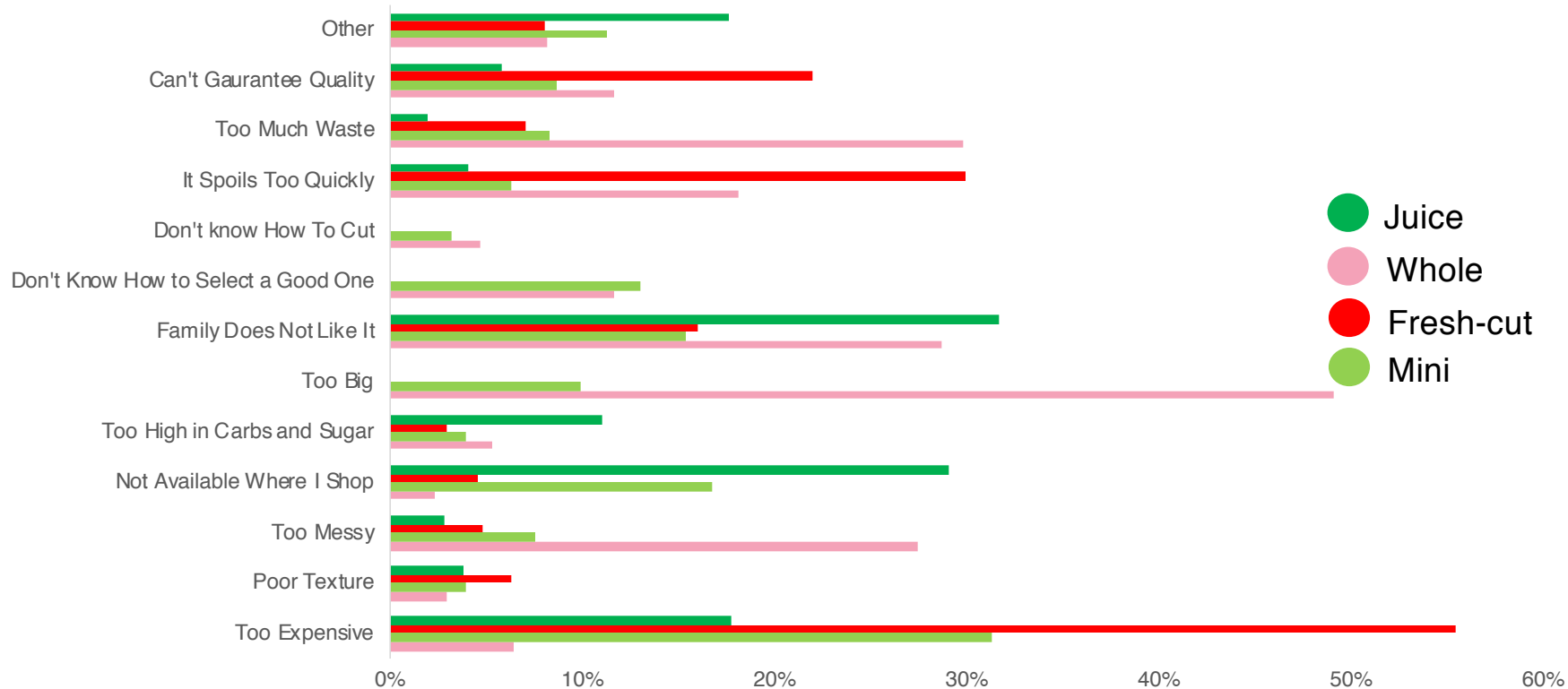


Source: Have you ever had a problem with the quality of watermelon that you've purchased?
Which of the following describes your watermelon quality issue?

REASONS WHY DO NOT PURCHASE SUMMER 2018

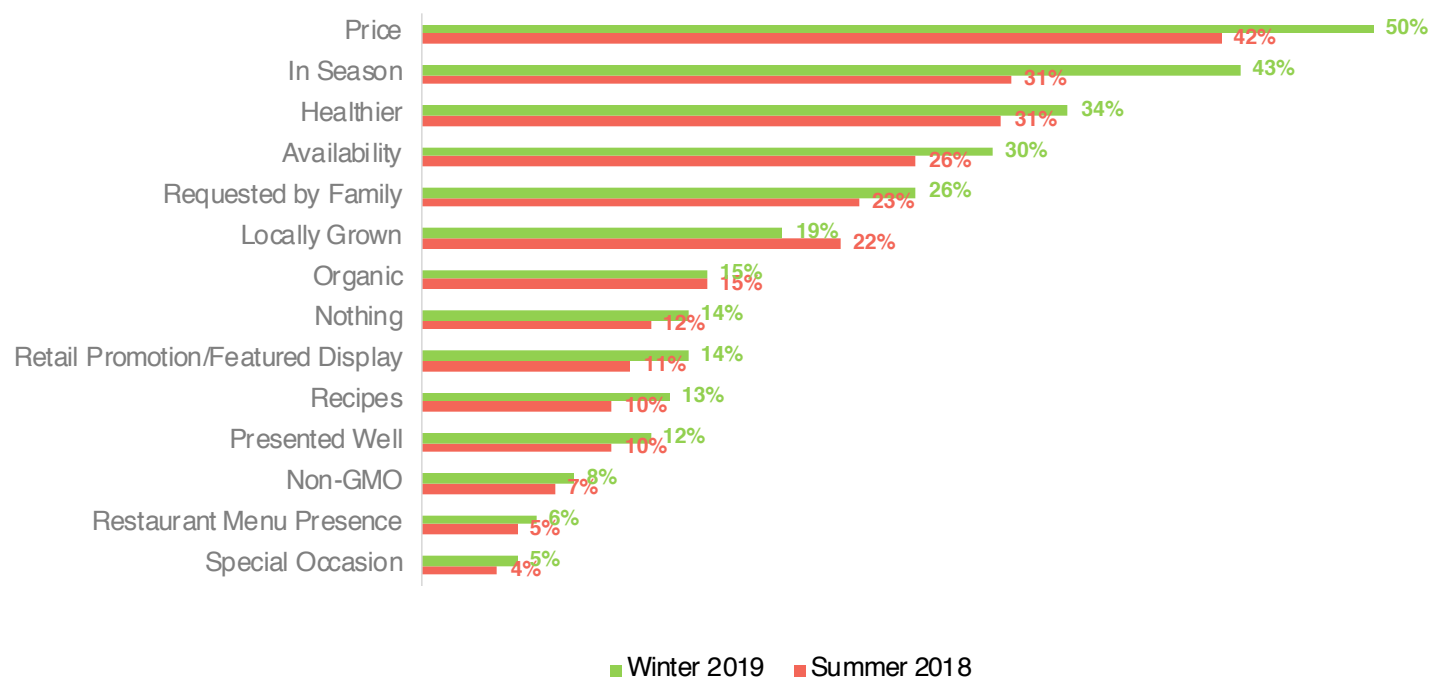


REASONS WHY DO NOT PURCHASE WINTER 2019



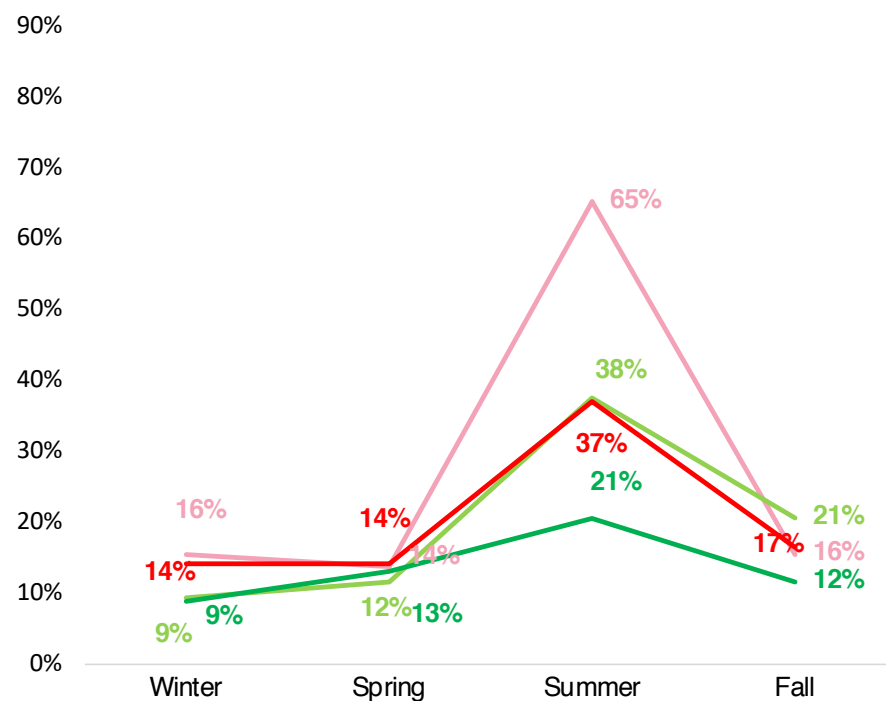
Source: Please explain why you do not purchase:

ENCOURAGE TO EAT MORE WATERMELON

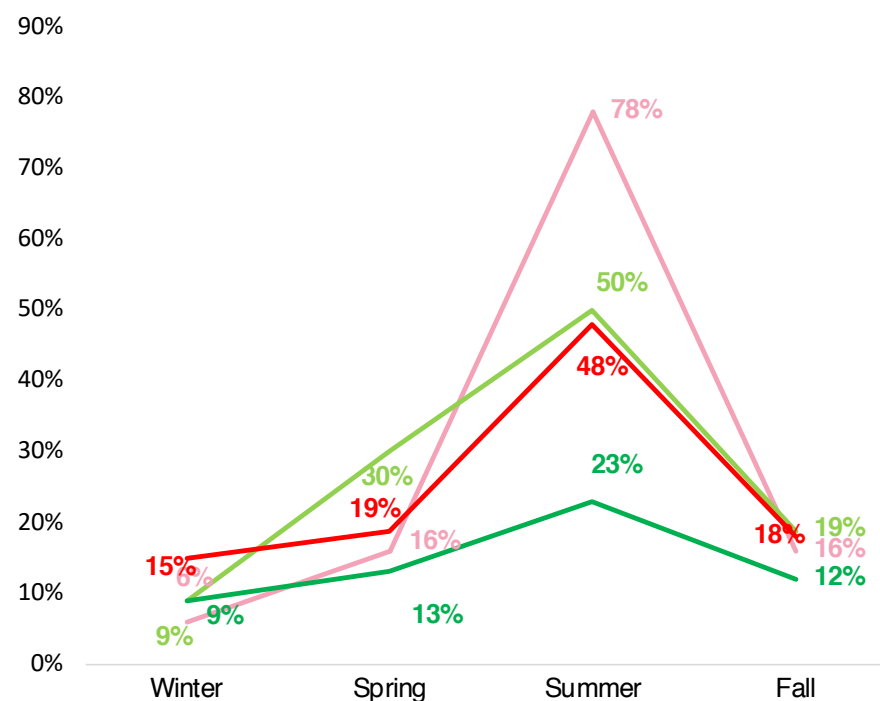


Source: What might encourage you to purchase more watermelon?

SEASONS PURCHASED SUMMER 2018



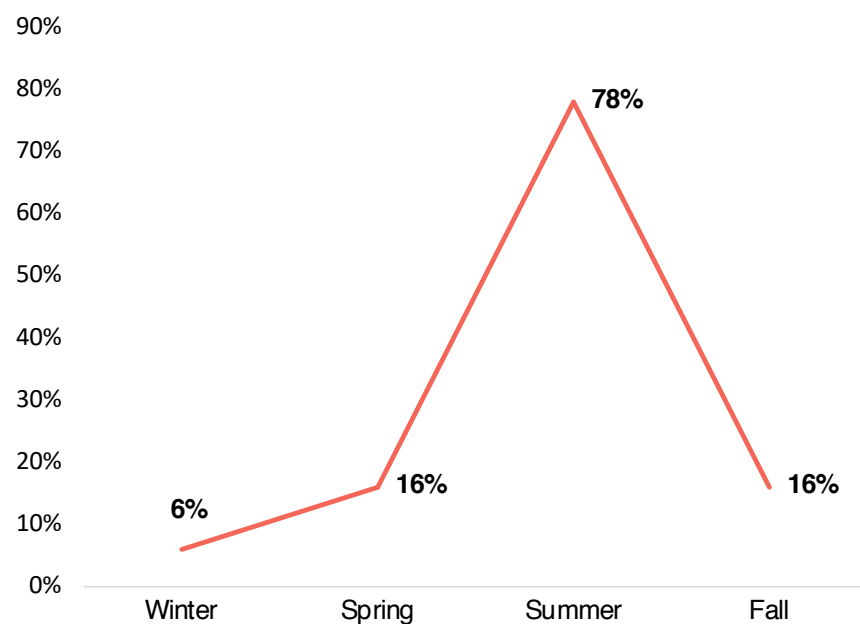
SEASONS PURCHASED WINTER 2019



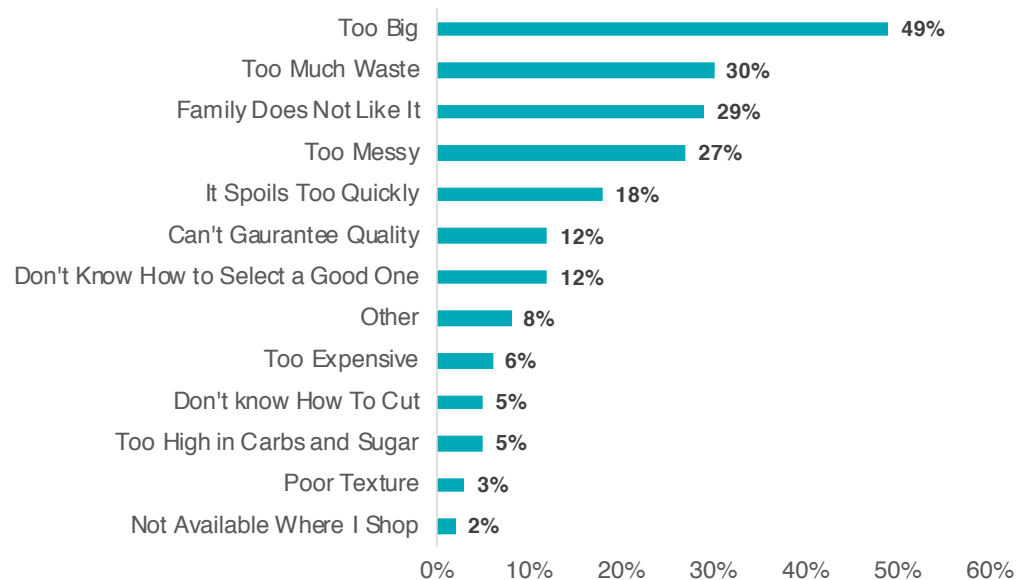
● Juice
 ● Whole
 ● Fresh-cut
 ● Mini

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

WHOLE WATERMELON

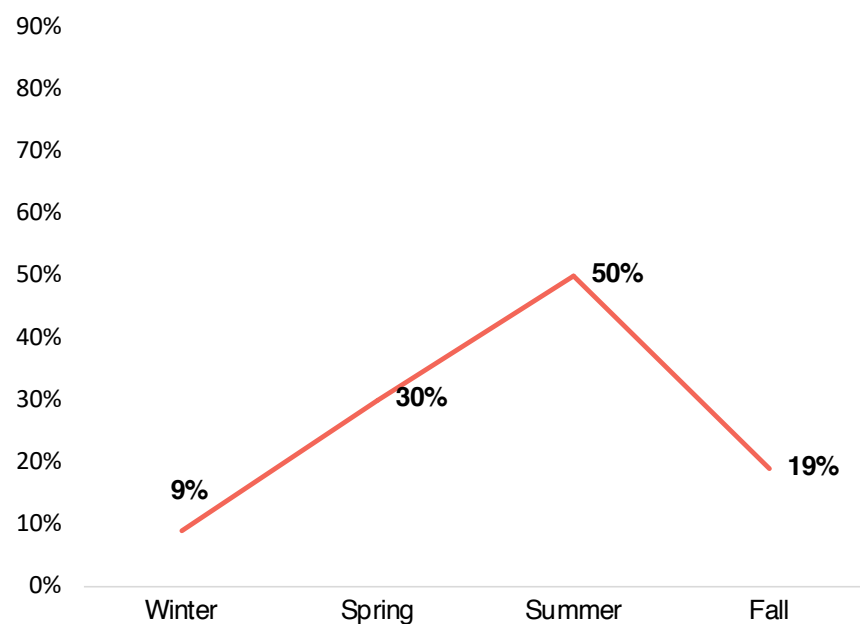


REASONS WHY DO NOT PURCHASE LARGE WATERMELON (OF THE 13% THAT DO NOT PURCHASE)

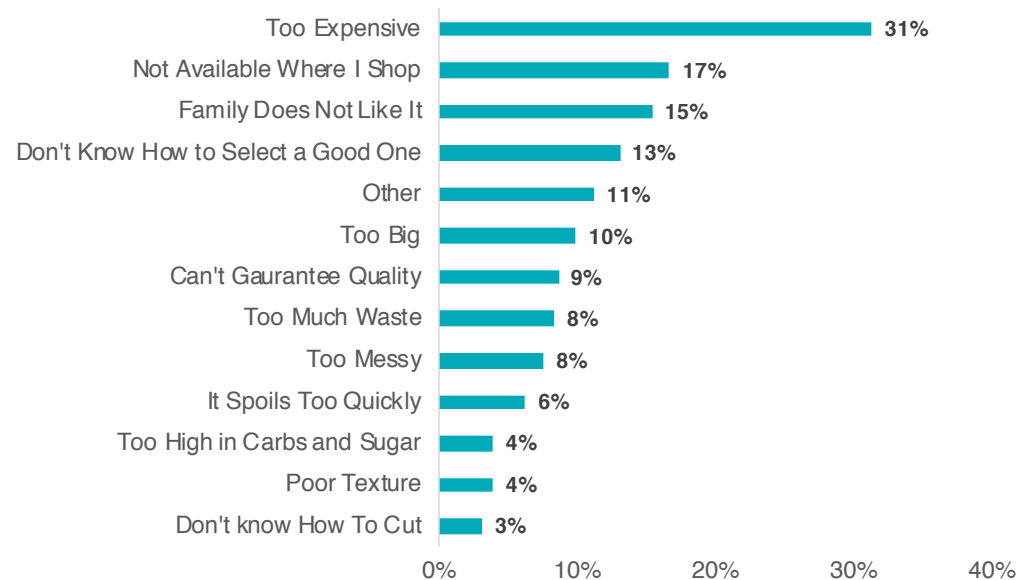


Source: Please select the seasons in which you purchase each type of watermelon.
Please explain why you do not purchase whole, large, or regular watermelon?

MINI WATERMELON

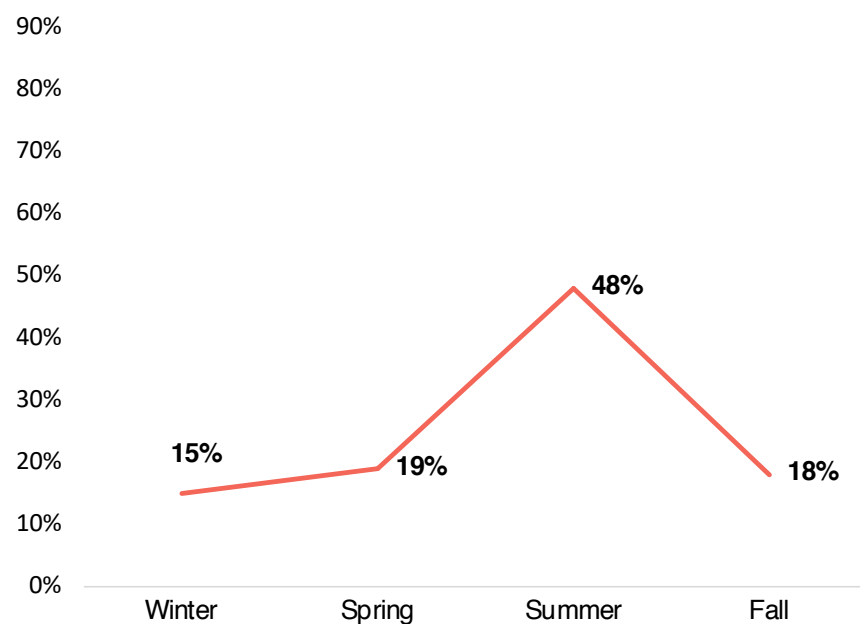


REASONS WHY DO NOT PURCHASE MINI WATERMELON (OF THE 30% THAT DO NOT PURCHASE)

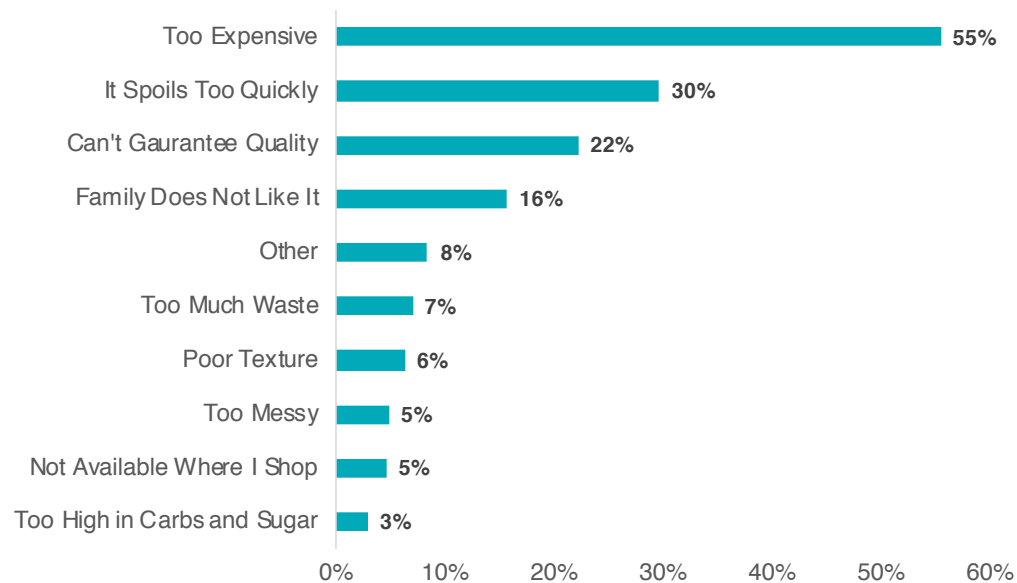


Source: Please select the seasons in which you purchase each type of watermelon.
Please explain why you do not purchase whole miniature watermelon?

FRESH CUT WATERMELON

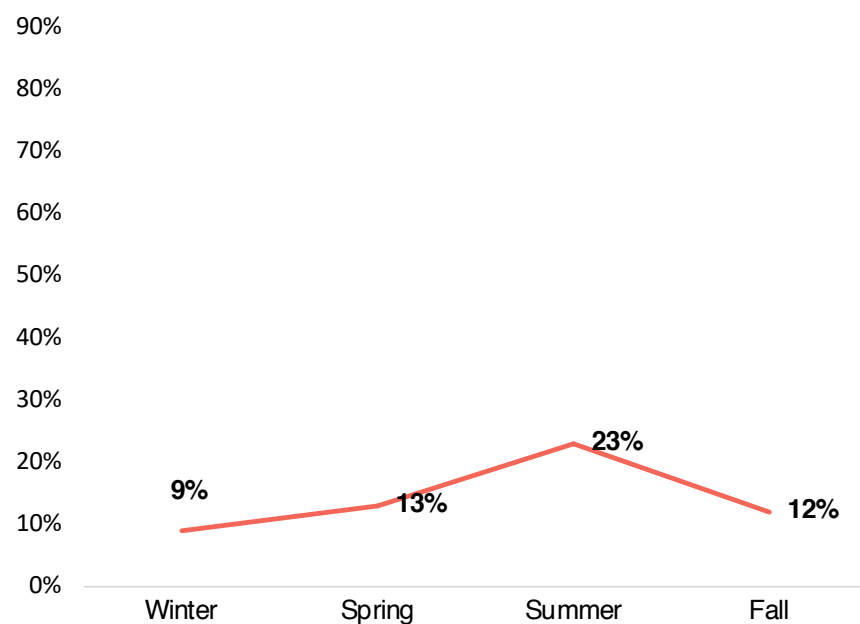


REASONS WHY DO NOT PURCHASE FRESH CUT WATERMELON (OF THE 33% THAT DO NOT PURCHASE)

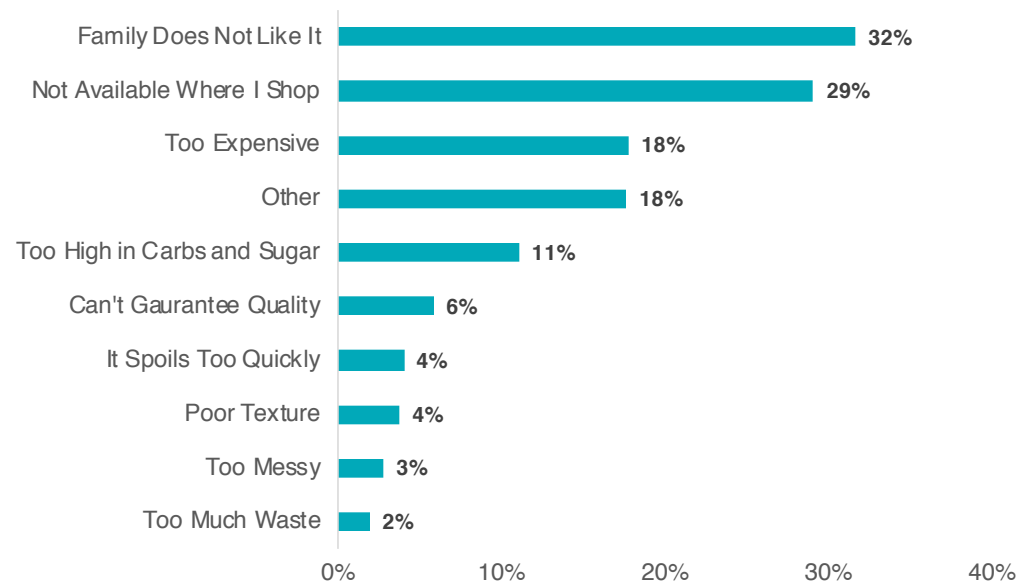


Source: Please select the seasons in which you purchase each type of watermelon.
Please explain why you do not purchase fresh cut watermelon?

WATERMELON JUICE



REASONS WHY DO NOT PURCHASE WATERMELON JUICE (OF THE 64% THAT DO NOT PURCHASE)

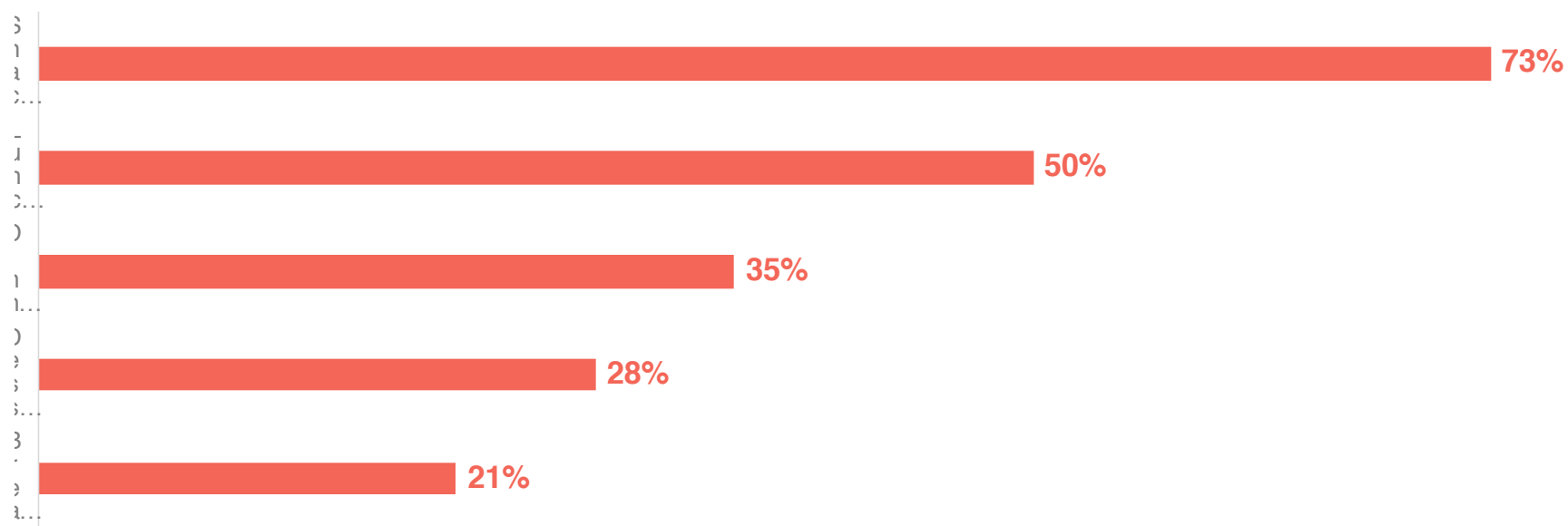


Source: Please select the seasons in which you purchase each type of watermelon.
Please explain why you don't purchase watermelon juice?

A top-down view of a white ceramic bowl filled with a fresh salad. The salad consists of large, irregular chunks of bright red watermelon, several large, vibrant green basil leaves, small cubes of white feta cheese, and a few dark, pitted olives. The ingredients are lightly coated with a dark dressing. The bowl is set on a light blue, weathered wooden surface. To the right of the bowl, two small, delicate purple flowers are scattered on the wood. The text 'WATERMELON CONSUMPTION' is overlaid in the bottom left corner in a bold, white, sans-serif font.

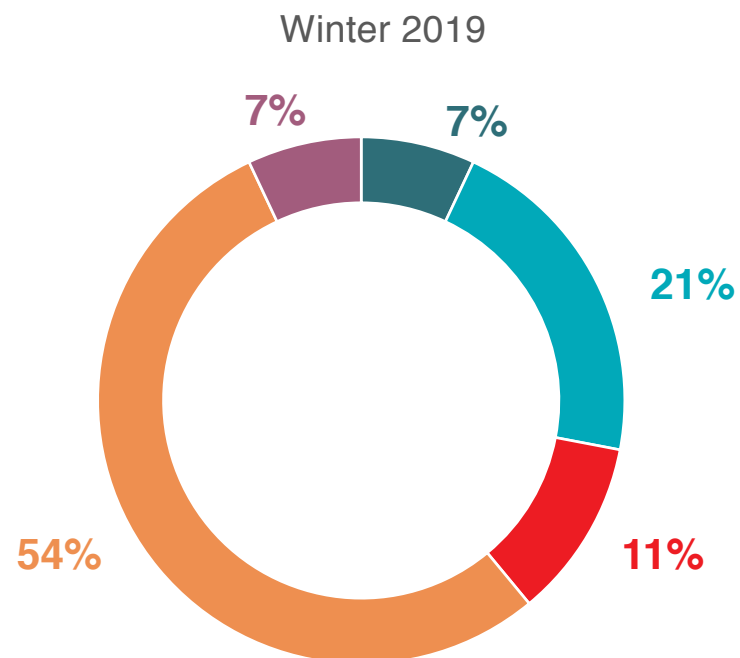
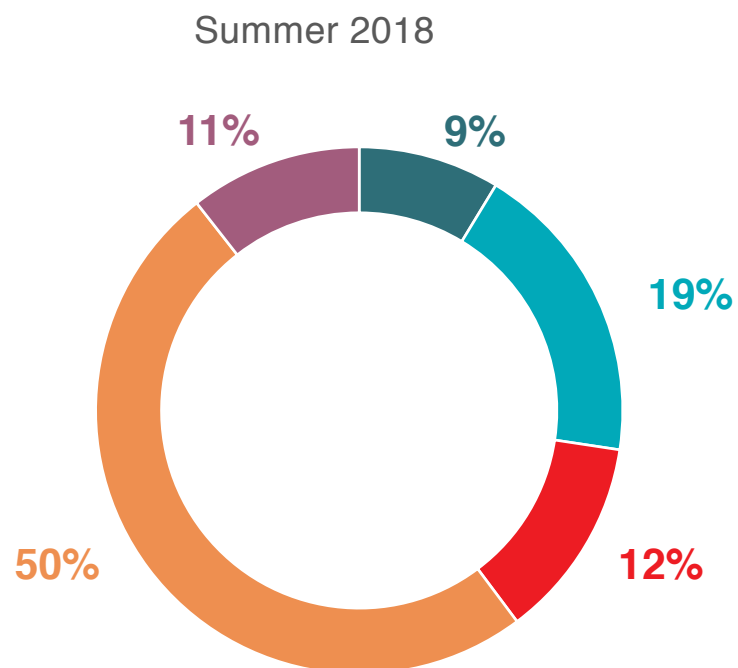
WATERMELON CONSUMPTION

TIME OF DAY WATERMELON IS EATEN



Source: When during the day do you eat watermelon?

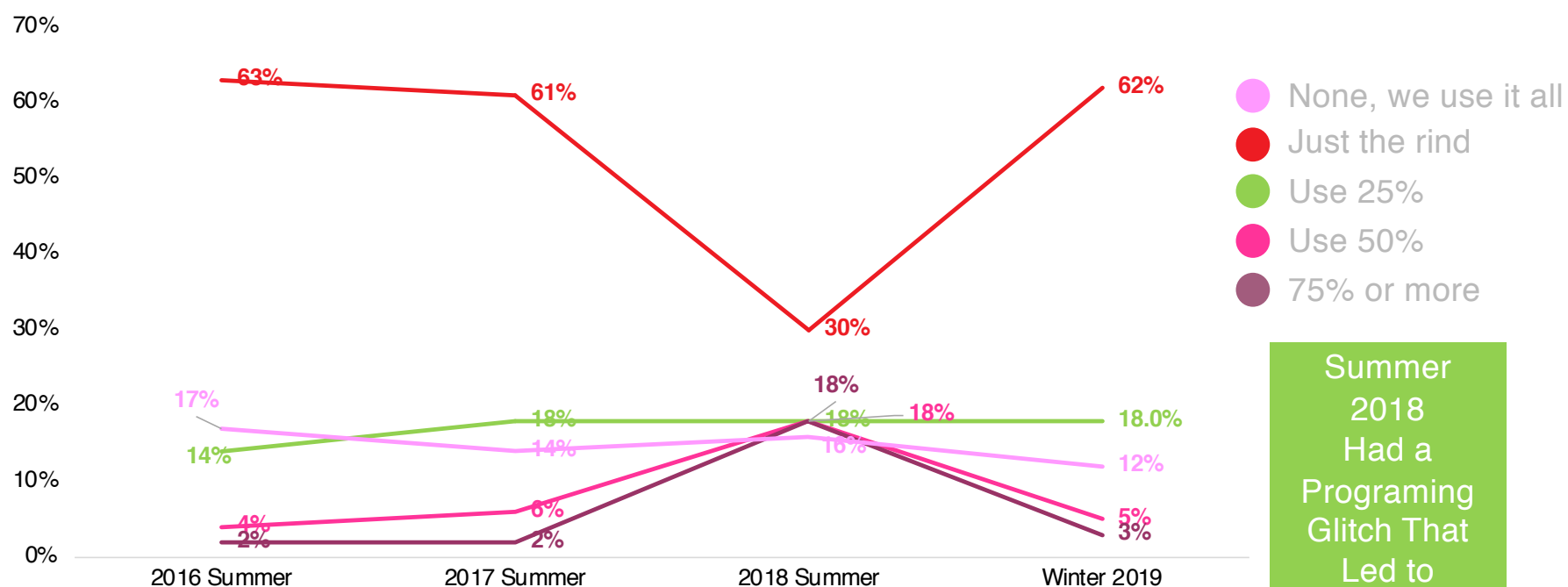
TIME OF DAY MAJORITY OF WATERMELON IS EATEN



● Breakfast ● Lunch ● Dinner ● Snack ● Dessert

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

PERCENTAGE OF WATERMELON GOING TO WASTE



Summer
2018
Had a
Programing
Glitch That
Led to
Distorted
Data

Source: When purchasing a whole watermelon, how much, if any, goes to waste?

CONSUMPTION BY PERCENTAGE OF TIME

Summer 2018

88%
Plain watermelon

12%
In a recipe

Winter 2019

92%
Plain watermelon

8%
In a recipe

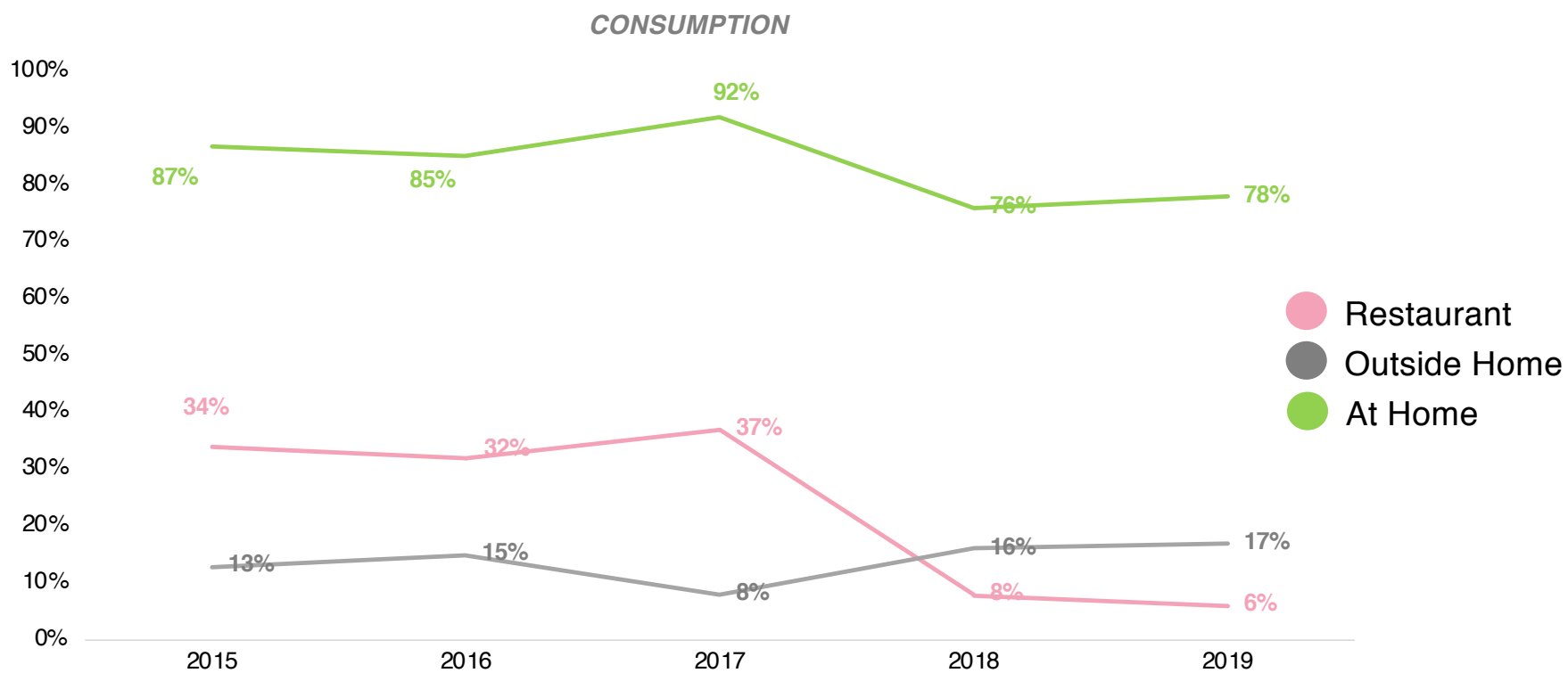
Source: How do you prepare watermelon for consumption as a percentage of time?

LOCATION OF CONSUMPTION BY PERCENTAGE OF TIME

Summer 2018	76% In my home	16% Outside my home	8% Restaurant or other food service location
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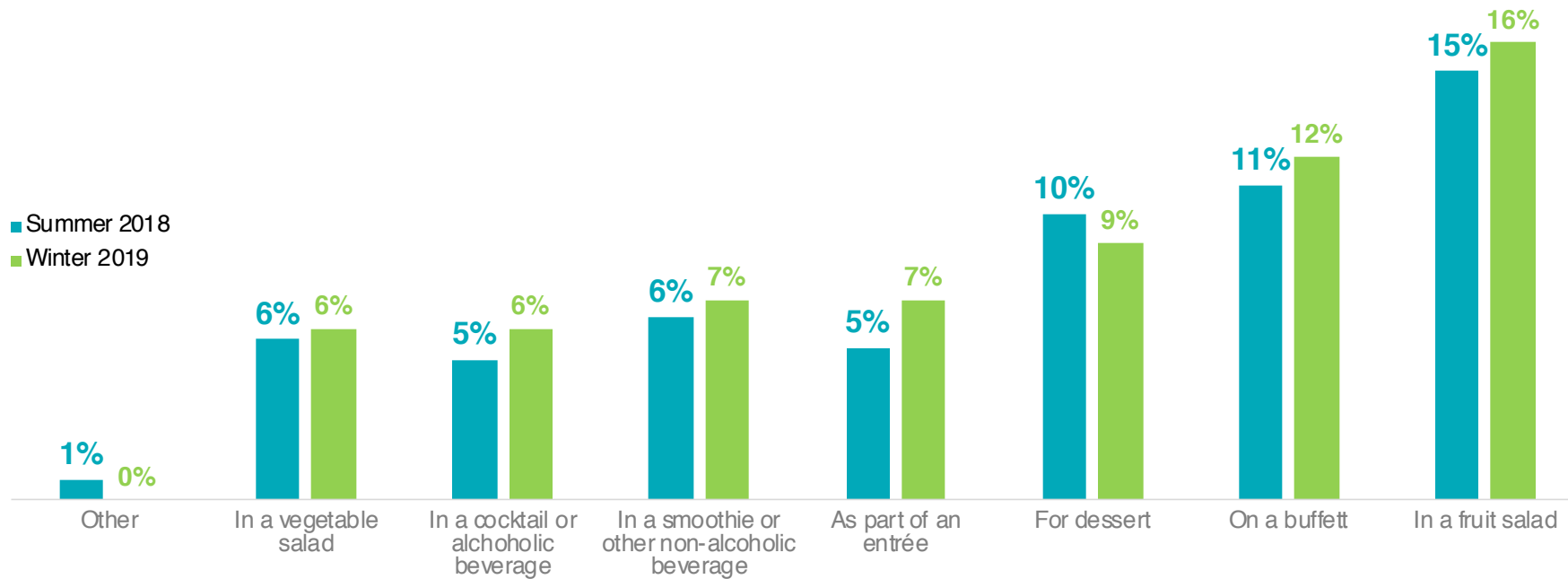
Winter 2019	78% In my home	17% Outside my home	6% Restaurant or other food service location
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Source: Where do you consume watermelon as a percentage of time?



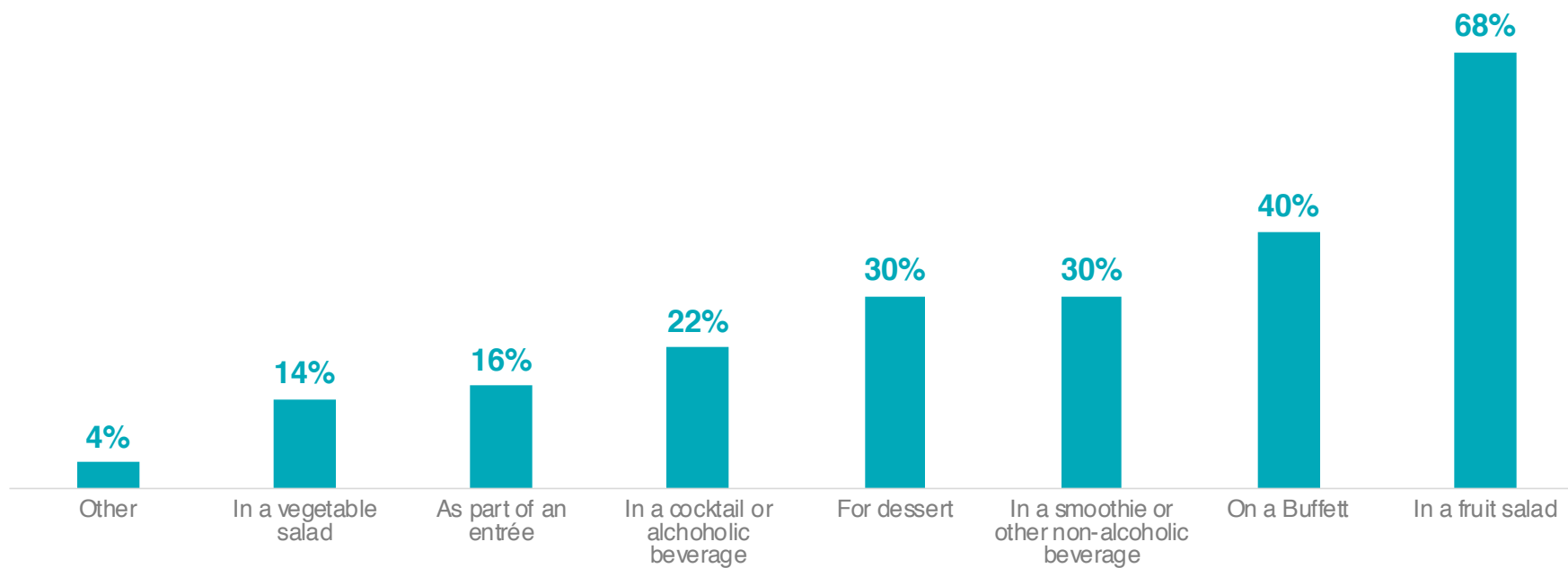
Source: Where do you consume watermelon as a percentage of time?

Ways Watermelon is Consumed in a Restaurant



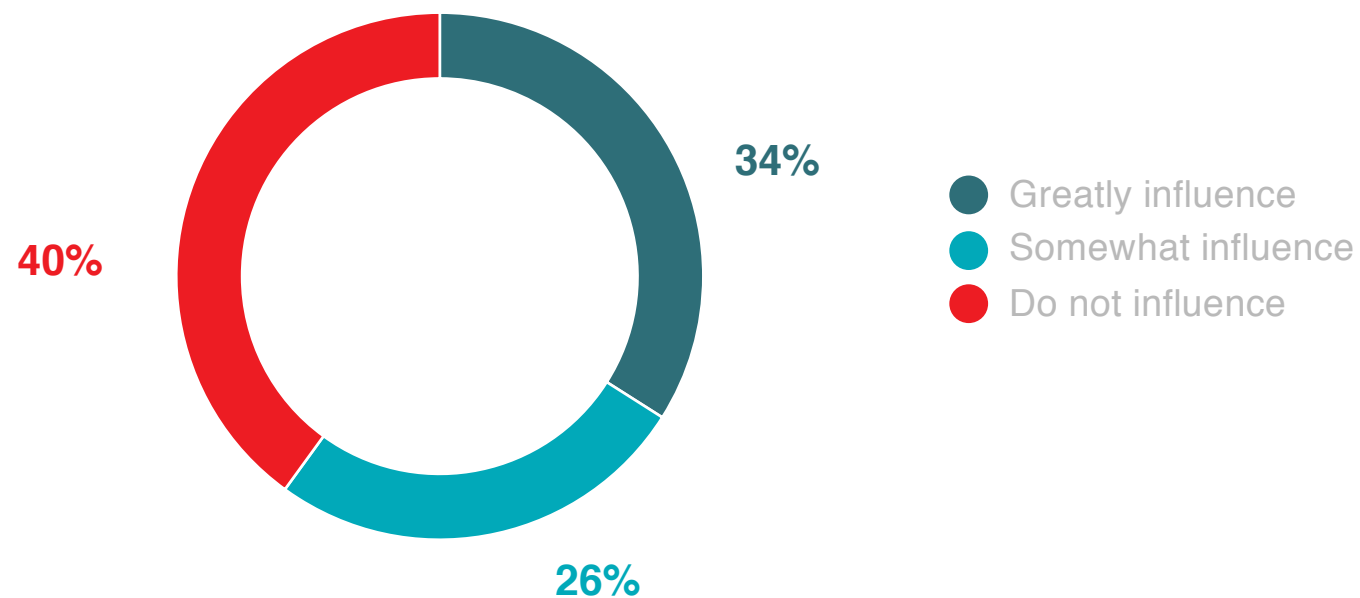
Source: Typically, in what way(s) do you consume watermelon at a restaurant?

Ways Watermelon is Considered in a Restaurant



Source: Typically, in what way(s) would you consider ordering watermelon at a restaurant?

***INFLUENCE CHILDREN HAVE ON WATERMELON
PURCHASES***



Source: How much influence do your children influence your watermelon purchases?

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