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
- 55% FEMALE
- The primary food shopper

Number of People Living in Household
- 1: 23%
- 2: 36%
- 3: 18%
- 4: 15%
- 5: 6%
- 6: 2%
- 7+: 2%

Number of Children Under 18 in House
- 0: 56%
- 1: 14%
- 2: 21%
- 3: 4%
- 4: 2%
- 5: 1%
- 6+: 1%

Weekly Grocery Spend
- $0 - $50: 20%
- $51 - $100: 42%
- $101 - $150: 27%
- $151 - $200: 6%
- $200+: 6%

Age
- 18-24: 10%
- 25-34: 19%
- 35-44: 20%
- 45-54: 18%
- 55-64: 15%
- 65+: 18%

Gender
- Female: 55%

Food Shopper
- 100%
Demographics of Respondents

**Physical Activity Per Week**
- Everyday: 23%
- 4-6 Days: 24%
- 2-4 Days: 25%
- Once a Week: 9%
- Less Than Once a Week or Never: 19%

**Household Income**
- $0 - $49,999: 47%
- $50,000 - $99,999: 31%
- $100,000 - $149,999: 12%
- $150,000 - $199,999: 4%
- $200,000+: 3%

**Education Level**
- Some High School: 2%
- High School/GED: 22%
- Some College/2 Yr Program: 36%
- Bachelor's Degree: 26%
- Advanced Degree: 13%

**Ethnicity**
- Caucasian (Non-Hispanic): 76%
- African-American: 11%
- Hispanic/Latino: 8%
- Asian: 5%
- Other/Prefer not to say: 2%
Demographics of Respondents

- **California**: 10.6%
- **West**: 12.4%
- **South Central**: 8.3%
- **Plains**: 7.0%
- **Great Lakes**: 15.8%
- **Midsouth**: 11.1%
- **Southeast**: 15.4%
- **Northeast**: 20.2%
Social Media Accounts Respondents Use

- Facebook: 78%
- YouTube: 49%
- Instagram: 40%
- Pinterest: 32%
- Twitter: 30%
- LinkedIn: 23%
- Snapchat: 20%
- Other: 1%

Source: What, if any, of the following social networking websites do you belong?
How have you used your mobile device to assist you with your grocery shopping

<table>
<thead>
<tr>
<th>Option</th>
<th>Winter 2019</th>
<th>Summer 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>To get coupons (digital or traditional)</td>
<td>46%</td>
<td>44%</td>
</tr>
<tr>
<td>To keep my grocery list</td>
<td>44%</td>
<td>41%</td>
</tr>
<tr>
<td>To find recipes</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>To compare prices</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>I don't use my mobile device to assist with grocery...</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>To look up nutritional content</td>
<td>44%</td>
<td>46%</td>
</tr>
<tr>
<td>To look up allergy information</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: How have you used your mobile device to assist you with your grocery shopping?

The question was altered to allow respondents to select more than one option.
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: 66%
- Can be preserved/stored: 47%
- Are locally grown: 45%
- Are completely used (zero waste): 39%
- Are organic: 31%
- Are sustainably raised/grown: 32%
- Have eco-friendly packaging: 31%
- Are non-GMO: 30%
- Can be stretched by using the food scraps: 28%
- Can be composted/recycled: 23%
- None of these: 7%

Source: I feel better when I purchase food that is: Winter 2019

The question was altered to allow respondents to select more than one option.
<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can be used in multiple recipes/meal</td>
<td>66%</td>
</tr>
<tr>
<td>Can be preserved/stored</td>
<td>47%</td>
</tr>
<tr>
<td>Are locally grown</td>
<td>45%</td>
</tr>
<tr>
<td>Are completely used (zero waste)</td>
<td>39%</td>
</tr>
<tr>
<td>Are organic</td>
<td>31%</td>
</tr>
<tr>
<td>Are sustainably raised/grown</td>
<td>32%</td>
</tr>
<tr>
<td>Have eco-friendly packaging</td>
<td>29%</td>
</tr>
<tr>
<td>Are non-GMO</td>
<td>30%</td>
</tr>
<tr>
<td>Can be stretched by using the food scraps</td>
<td>28%</td>
</tr>
<tr>
<td>Can be composted/recycled</td>
<td>23%</td>
</tr>
<tr>
<td>None of these</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: I feel better when I purchase food that:
Source: I enjoy the taste of:

- Apples: Winter 2019: 73%, Summer 2018: 83%
- Strawberries: Winter 2019: 72%, Summer 2018: 86%
- Bananas: Winter 2019: 71%, Summer 2018: 82%
- Grapes: Winter 2019: 69%, Summer 2018: 84%
- Watermelons: Winter 2019: 67%, Summer 2018: 79%
- Blueberries: Winter 2019: 55%, Summer 2018: 71%
- Oranges: Winter 2019: 51%, Summer 2018: 83%
- Cantaloupes: Winter 2019: 51%, Summer 2018: 65%
- Blackberries: Winter 2019: 49%, Summer 2018: 60%
- Honeydews: Winter 2019: 40%, Summer 2018: 53%
- Pomegranates: Winter 2019: 29%, Summer 2018: 41%
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.
Please rate the following fruits in terms of value.

### RANKING OF FRUIT BY VALUE

Percentage Point Gain YOY

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Winter 2019</th>
<th>Summer 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oranges</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Bananas</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>Cantaloupe</td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Watermelon</td>
<td>-16</td>
<td>-16</td>
</tr>
<tr>
<td>Honeydew</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Grapes</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>Berries</td>
<td>6</td>
<td>14</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Winter 2019</th>
<th>Summer 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bananas</td>
<td>3.0</td>
<td>6.7</td>
</tr>
<tr>
<td>Apples</td>
<td>3.3</td>
<td>7.3</td>
</tr>
<tr>
<td>Oranges</td>
<td>7.8</td>
<td>7.8</td>
</tr>
<tr>
<td>Strawberries</td>
<td>7.6</td>
<td>7.6</td>
</tr>
<tr>
<td>Watermelon</td>
<td>7.4</td>
<td>7.4</td>
</tr>
<tr>
<td>Grapes</td>
<td>7.6</td>
<td>7.6</td>
</tr>
<tr>
<td>Blueberries</td>
<td>7.2</td>
<td>7.2</td>
</tr>
<tr>
<td>Cantaloupe</td>
<td>7.0</td>
<td>7.0</td>
</tr>
<tr>
<td>Raspberries</td>
<td>6.8</td>
<td>6.9</td>
</tr>
<tr>
<td>Blackberries</td>
<td>6.9</td>
<td>6.8</td>
</tr>
<tr>
<td>Honeydew</td>
<td>6.8</td>
<td>6.8</td>
</tr>
<tr>
<td>Pomegranate</td>
<td>6.6</td>
<td>6.6</td>
</tr>
</tbody>
</table>
RANKING OF FRUIT BY HEALTHY AND NUTRITIOUS
Percentage Point Gain YOY

Please rate the following fruits in terms of health.

- 1
- 2
- 3

Ranking:

1. Oranges
2. Bananas
3. Cantaloupe
4. Watermelon
5. Apples
6. Honeydew
7. Grapes
8. Berries

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

Winter 2019
Summer 2018
Please rate the following fruits in terms of safety:

- Oranges
- Bananas
- Watermelon
- Apples
- Honeydew
- Grapes
- Cantaloupe
- Strawberries
- Blueberries
- Blackberries
- Berries

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

- 2015 - 2016
- 2016 - 2017

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

- Winter 2019
- Summer 2018
<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>94%</td>
<td>8.4</td>
<td>7.8</td>
</tr>
<tr>
<td>Bananas</td>
<td>93%</td>
<td>8.4</td>
<td>8.2</td>
</tr>
<tr>
<td><strong>Watermelon</strong></td>
<td><strong>91%</strong></td>
<td><strong>7.8</strong></td>
<td><strong>7.5</strong></td>
</tr>
<tr>
<td>Apples</td>
<td>89%</td>
<td>8.5</td>
<td>8.0</td>
</tr>
<tr>
<td>Grapes</td>
<td>85%</td>
<td>7.9</td>
<td>7.5</td>
</tr>
<tr>
<td>Blueberries</td>
<td>84%</td>
<td>8.2</td>
<td>7.2</td>
</tr>
<tr>
<td>Raspberries</td>
<td>83%</td>
<td>8.0</td>
<td>6.9</td>
</tr>
<tr>
<td>Pomegranate</td>
<td>89%</td>
<td>7.7</td>
<td>6.4</td>
</tr>
<tr>
<td>Strawberries</td>
<td>83%</td>
<td>8.1</td>
<td>7.6</td>
</tr>
<tr>
<td>Blackberries</td>
<td>83%</td>
<td>7.9</td>
<td>6.9</td>
</tr>
<tr>
<td>Cantaloupe</td>
<td>87%</td>
<td>7.7</td>
<td>7.0</td>
</tr>
<tr>
<td>Honeydew</td>
<td>88%</td>
<td>7.5</td>
<td>6.8</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.
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.

Summer 2018: 7.1
Winter 2019: 8.0

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?
<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>79%</td>
<td>7%</td>
<td>8%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Bananas</td>
<td>81%</td>
<td>6%</td>
<td>5%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Blackberries</td>
<td>72%</td>
<td>8%</td>
<td>12%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Blueberries</td>
<td>72%</td>
<td>9%</td>
<td>11%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Cantaloupe</td>
<td>76%</td>
<td>5%</td>
<td>10%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Grapes</td>
<td>82%</td>
<td>5%</td>
<td>8%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Honeydew</td>
<td>73%</td>
<td>6%</td>
<td>1%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Oranges</td>
<td>79%</td>
<td>6%</td>
<td>7%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Pomegranate</td>
<td>70%</td>
<td>8%</td>
<td>11%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Raspberries</td>
<td>72%</td>
<td>8%</td>
<td>12%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Strawberries</td>
<td>73%</td>
<td>7%</td>
<td>12%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Watermelon</td>
<td>74%</td>
<td>4%</td>
<td>10%</td>
<td>6%</td>
<td>6%</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*)

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

- Good for hydration
- Low in calories
- Low in fat
- High in Vitamin C
- Source of Vitamin A
- Good for post-workout
- Source of Potassium
- Source of Vitamin B-6
- Promotes blood flow
- Boosts Iron Absorption
- High in calcium
- None of these
- Protects Against Sun Damage

Source: Which of the following statements do you know to be true about watermelon?
Would knowing that watermelon is good for hydration make you want to purchase (or purchase more) of it in the future?

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

- Wash it and run it under tap: 61% (Summer 2018), 63% (Winter 2019)
- Nothing: 35% (Summer 2018), 33% (Winter 2019)
- Other: 4% (Summer 2018), 4% (Winter 2019)

Source: What do you do with your watermelon before you consume it?
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?
REASONS WHY DO NOT PURCHASE SUMMER 2018

- It's not available at the store where I shop
- Too Big
- Too Much Waste
- Don't Like Taste
- Spoils Too Quickly
- Too Messy
- Don't Know How to Select Good One
- Can't Guarantee Quality
- Too High In Sugar/Carbs
- Too Expensive/Not good Value
- Don't Know How to Cut One
- Poor Texture

Source: Please explain why you do not purchase:
Source: Please explain why you do not purchase:

- Too Expensive
- Poor Texture
- Not Available Where I Shop
- Too High in Carbs and Sugar
- Too Big
- Family Does Not Like It
- Don't know How To Cut
- Don't Know How to Select a Good One
- Too Much Waste
- It Spoils Too Quickly
- Other

Options:
- Juice
- Whole
- Fresh-cut
- Mini
Encourage to Eat More Watermelon

- Price: 50% Winter 2019, 43% Summer 2018
- In Season: 31% Winter 2019, 34% Summer 2018
- Healthier: 26% Winter 2019, 30% Summer 2018
- Availability: 23% Winter 2019, 26% Summer 2018
- Requested by Family: 19% Winter 2019, 22% Summer 2018
- Locally Grown: 16% Winter 2019, 22% Summer 2018
- Organic: 12% Winter 2019, 14% Summer 2018
- Nothing: 11% Winter 2019, 14% Summer 2018
- Retail Promotion/Featured Display: 11% Winter 2019, 13% Summer 2018
- Recipes: 10% Winter 2019, 13% Summer 2018
- Presented Well: 10% Winter 2019, 12% Summer 2018
- Non-GMO: 7% Winter 2019, 10% Summer 2018
- Restaurant Menu Presence: 6% Winter 2019, 6% Summer 2018
- Special Occasion: 5% Winter 2019, 4% Summer 2018

Source: What might encourage you to purchase more watermelon?
Source: Please select the seasons in which you purchase each type of 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?
Source: Please select the seasons in which you purchase each type of watermelon. Please explain why you do not purchase fresh cut watermelon?
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 WATERMELON IS EATEN

- 73%
- 50%
- 35%
- 28%
- 21%

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

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

**Summer 2018**
- Breakfast: 50%
- Lunch: 19%
- Dinner: 11%
- Snack: 7%
- Dessert: 7%

**Winter 2019**
- Breakfast: 21%
- Lunch: 7%
- Dinner: 7%
- Snack: 7%
- Dessert: 11%

Source: When during the day do you eat the majority of Watermelon?
When purchasing a whole watermelon, how much, if any, goes to waste?

PERCENTAGE OF WATERMELON GOING TO WASTE

- None, we use it all: 18.0%
- Just the rind: 62%
- Use 25%: 30%
- Use 50%: 18%
- 75% or more: 5%

Source: When purchasing a whole watermelon, how much, if any, goes to waste?
## CONSUMPTION BY PERCENTAGE OF TIME

<table>
<thead>
<tr>
<th>Year</th>
<th>Plain Watermelon</th>
<th>In a Recipe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2018</td>
<td>88%</td>
<td>12%</td>
</tr>
<tr>
<td>Winter 2019</td>
<td>92%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: How do you prepare watermelon for consumption as a percentage of time?
### Location of Consumption by Percentage of Time

<table>
<thead>
<tr>
<th>Year</th>
<th>In My Home</th>
<th>Outside My Home</th>
<th>Restaurant or Other Food Service Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2018</td>
<td>76%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Winter 2019</td>
<td>78%</td>
<td>17%</td>
<td>6%</td>
</tr>
</tbody>
</table>

*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

- In a vegetable salad: 6% (Summer 2018), 6% (Winter 2019)
- In a cocktail or alcoholic beverage: 5% (Summer 2018), 6% (Winter 2019)
- In a smoothie or other non-alcoholic beverage: 6% (Summer 2018), 7% (Winter 2019)
- As part of an entrée: 5% (Summer 2018), 7% (Winter 2019)
- For dessert: 10% (Summer 2018), 9% (Winter 2019)
- On a buffet: 11% (Summer 2018), 12% (Winter 2019)
- In a fruit salad: 15% (Summer 2018), 16% (Winter 2019)

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

- Greatly influence: 34%
- Somewhat influence: 40%
- Do not influence: 26%

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