



NATIONAL WATERMELON PROMOTION BOARD

Annual Consumer Research Findings

April 21, 2020



PURPOSE

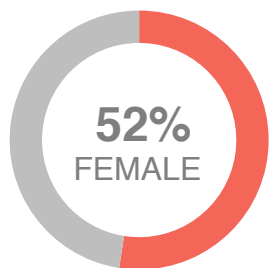
To design and implement a consumer tracking survey to enable the National Watermelon Promotion Board to grow demand

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



Profile of Respondents 1249 Completes

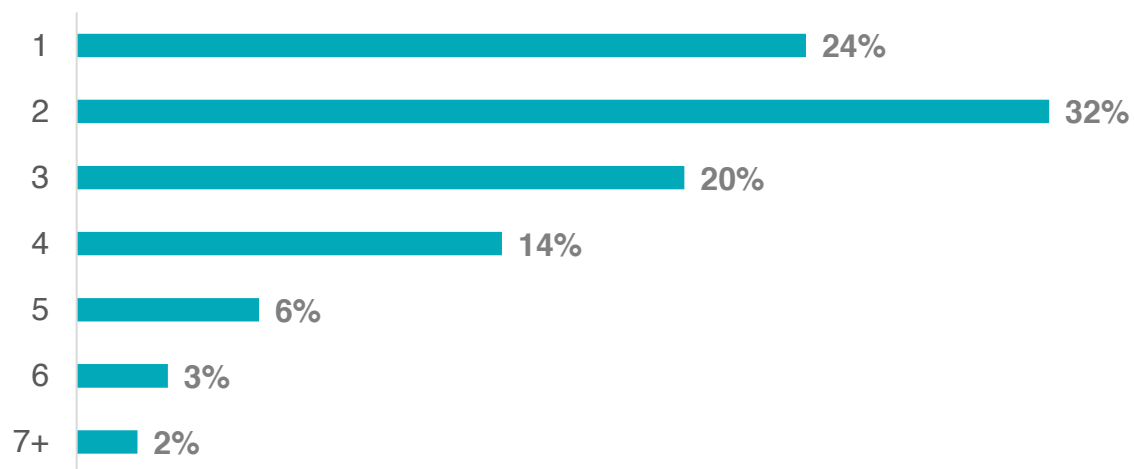


Gender

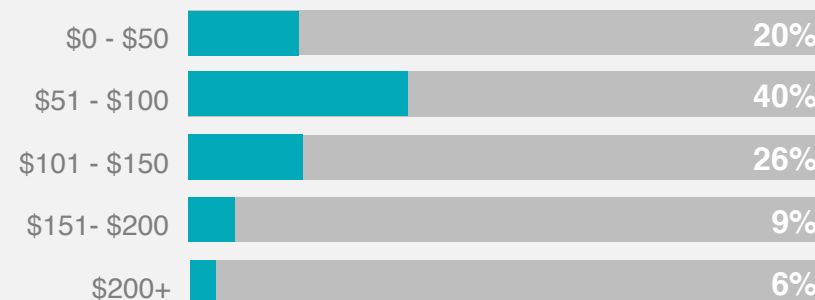


The primary food shopper

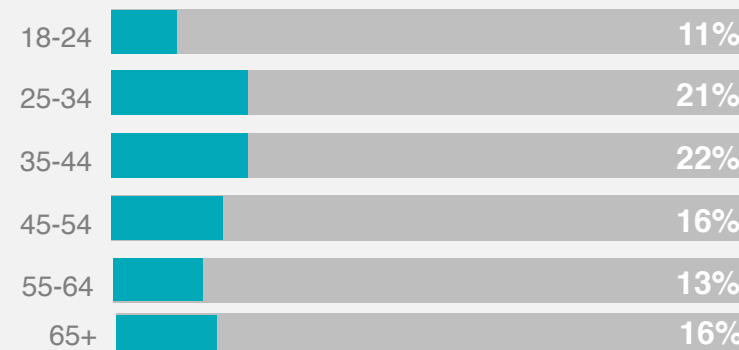
Number of People Living in Household



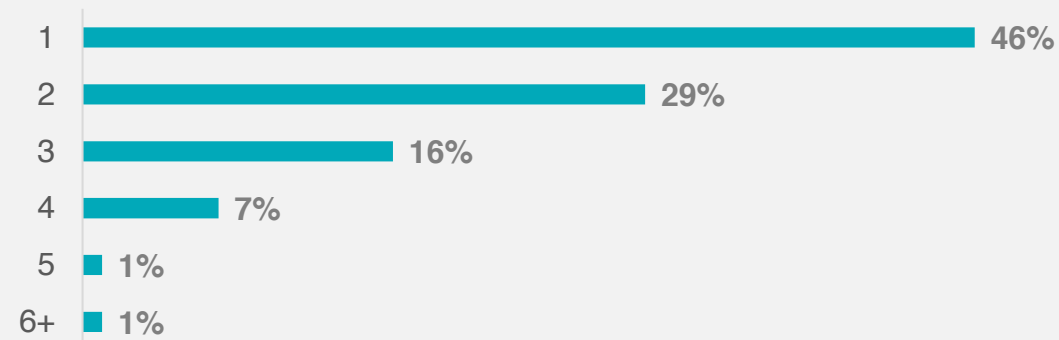
Weekly Grocery Spend



Age

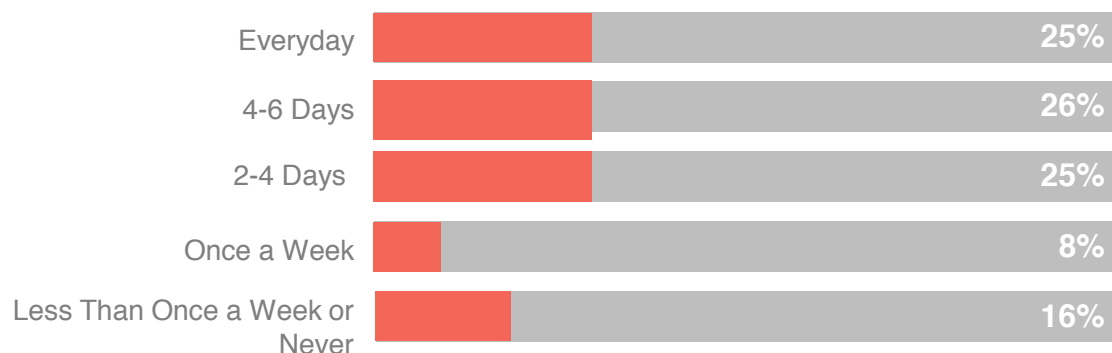


Number of Children in Household
(among those who have children)

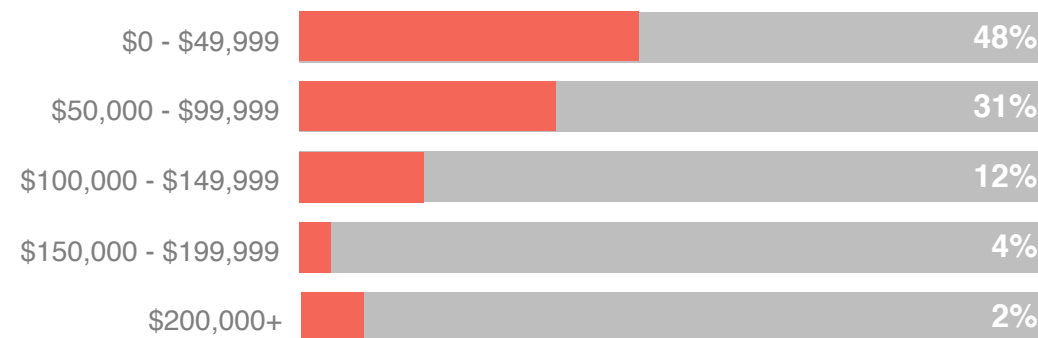


Demographics of Respondents

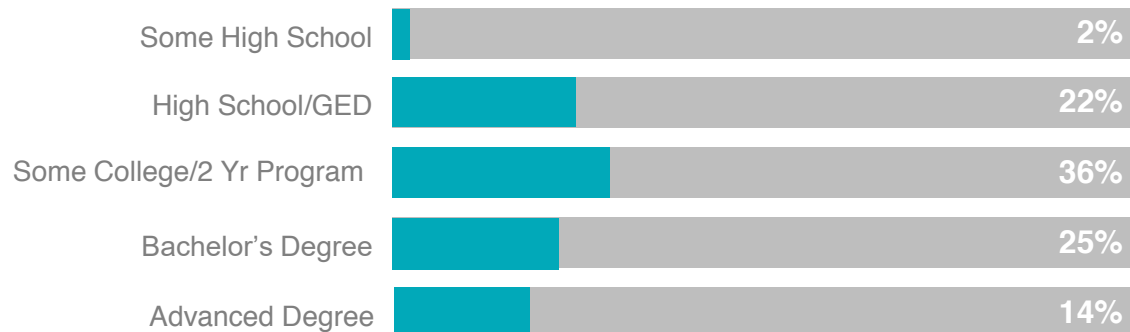
Physical Activity Per Week



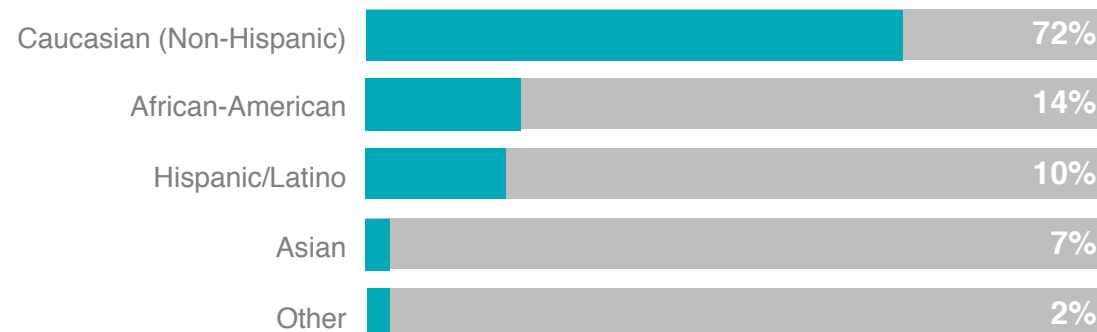
Household Income



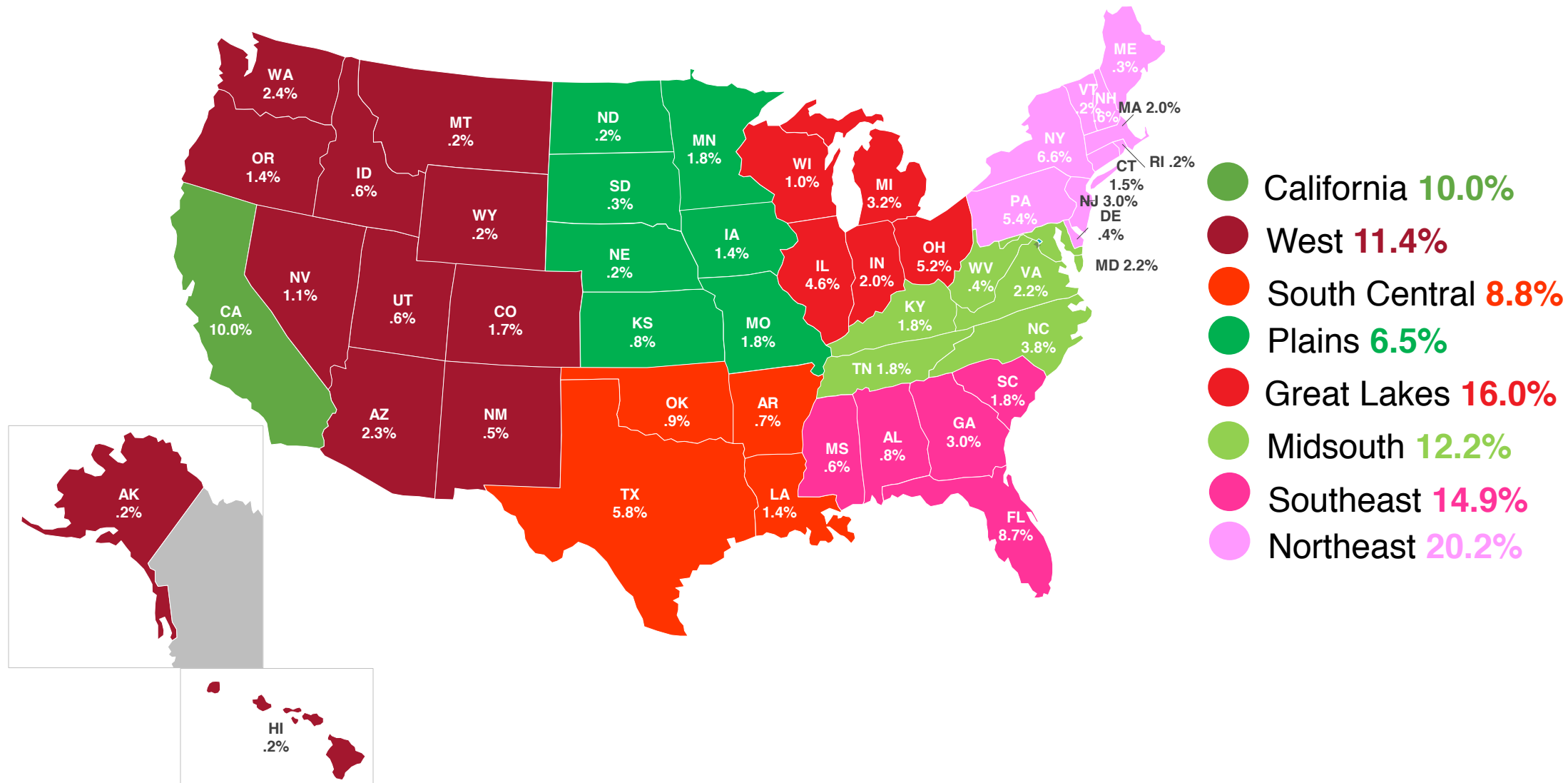
Education Level



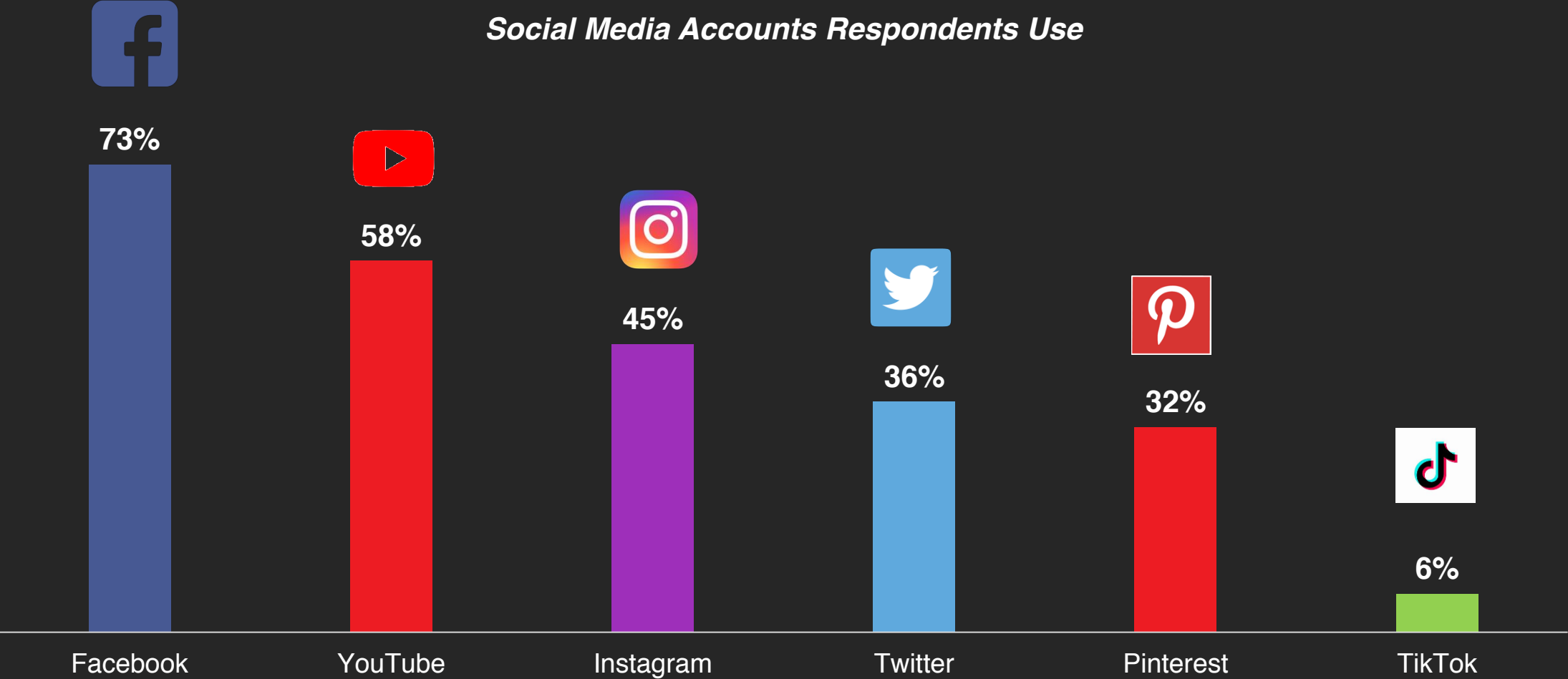
Race/Ethnicity



Demographics of Respondents



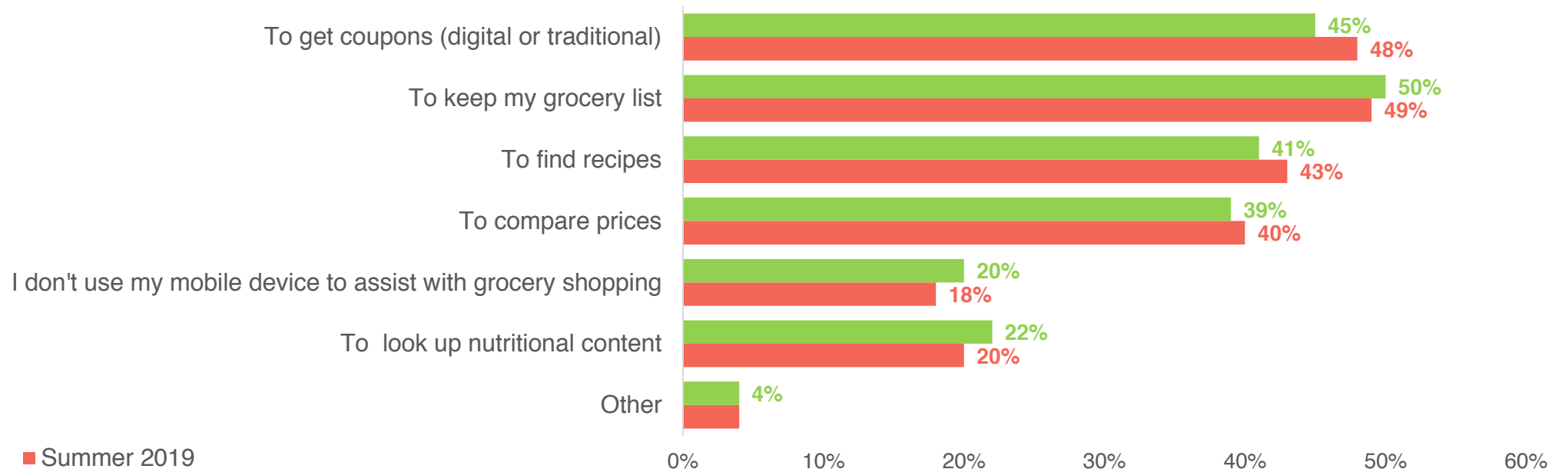
Social Media Accounts Respondents Use



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? 2019 vs 2020

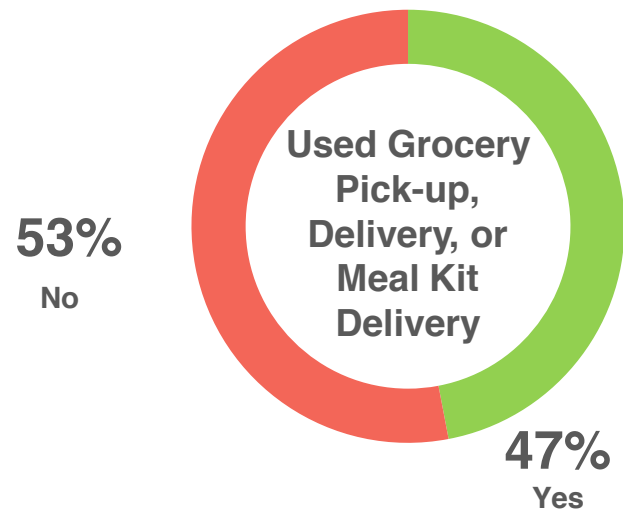


Source: Please indicate below how have you used your mobile device to assist you with your grocery shopping?(Check all that apply)

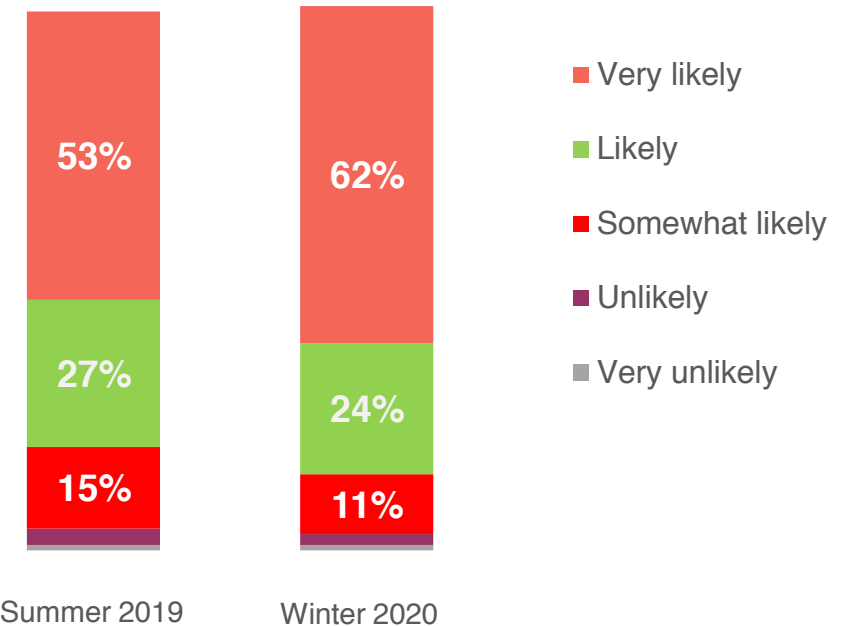
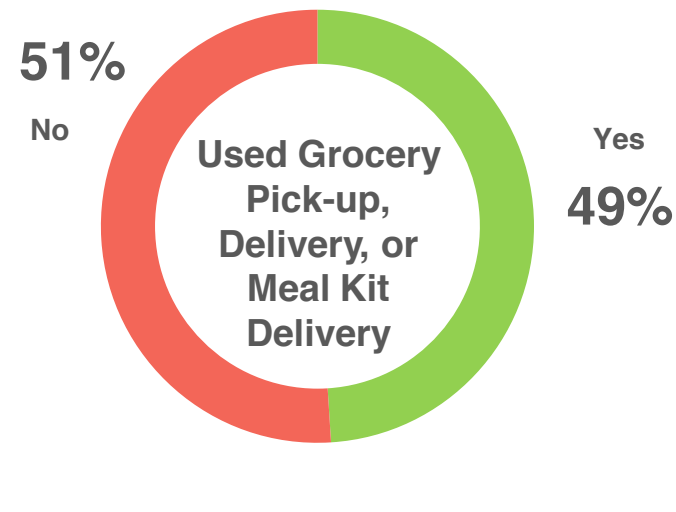


**Likelihood to Continue Using
(Among Those Currently Using)**

Summer 2019



Winter 2020

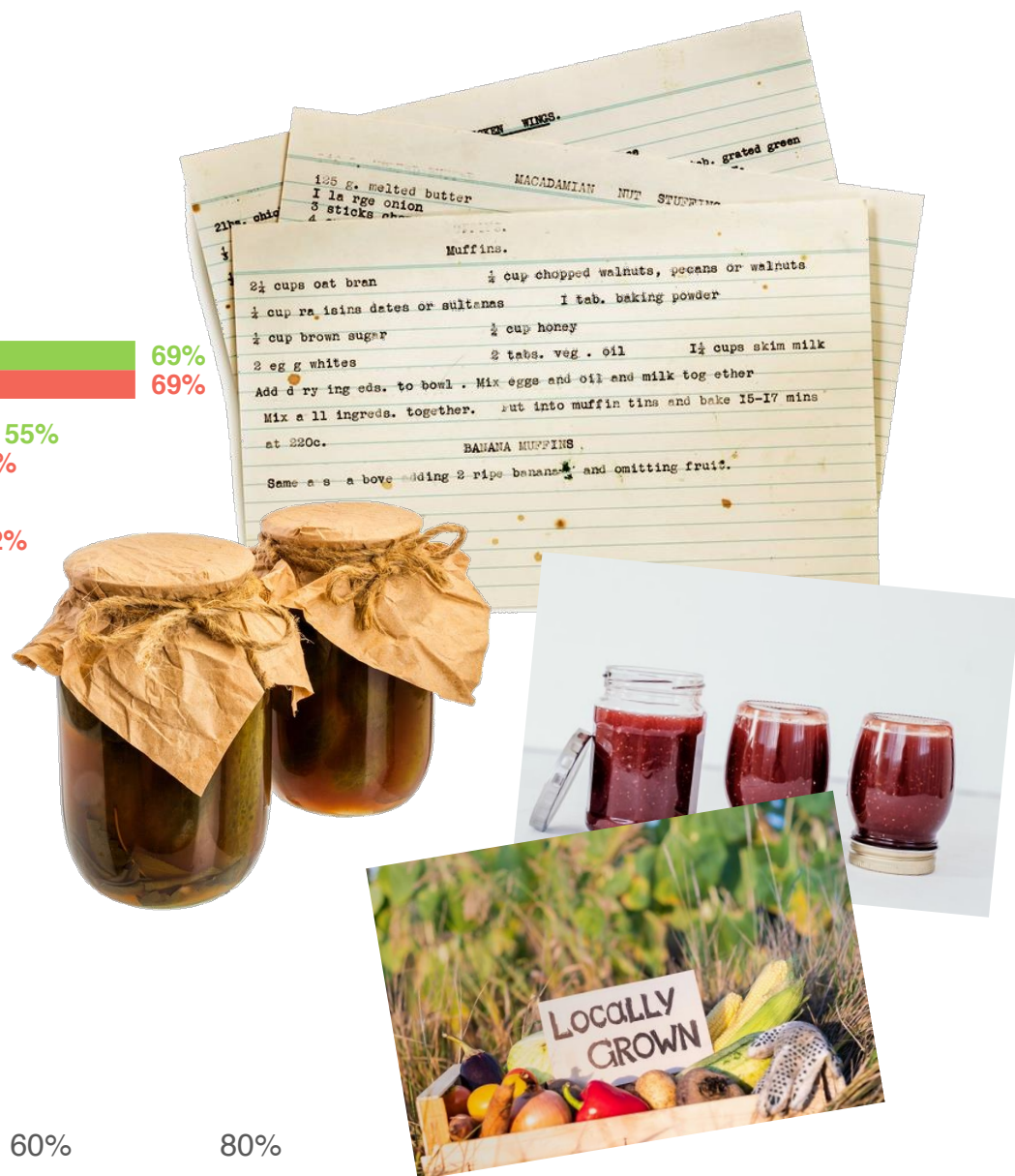
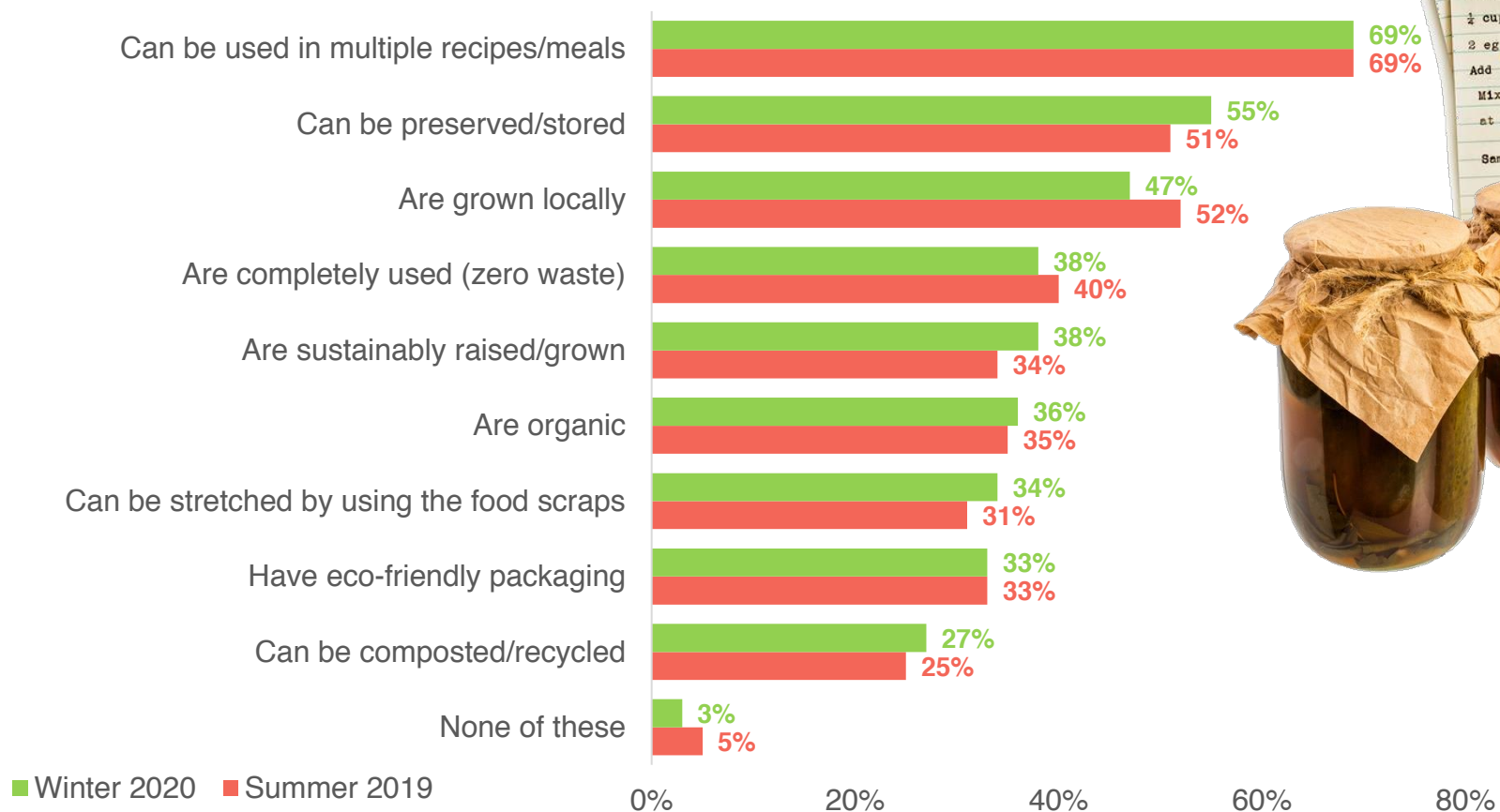


Source: Have you ever used a grocery pick-up, grocery delivery, or meal kit delivery service such as Instacart, PeaPod, ClickList, Wal-Mart Pick Up, or Amazon Pantry?
How likely are you to continue using one of these services?

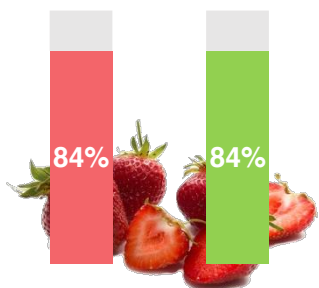


FRUIT ATTITUDES & CONSUMPTION

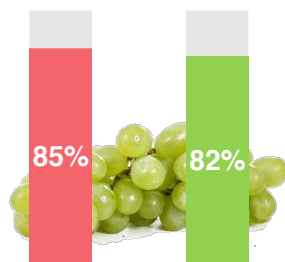
I Feel Better When I Purchase Food That ...



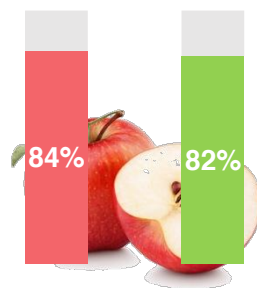
Percent Of People That Like The Taste Of ...



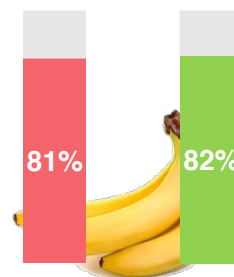
Strawberries



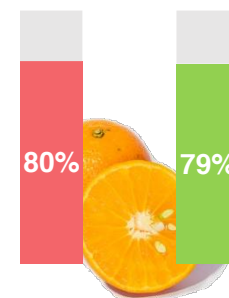
Grapes



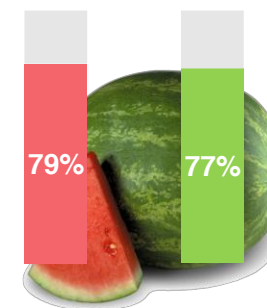
Apples



Bananas

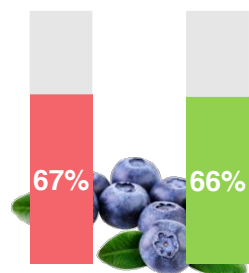


Oranges

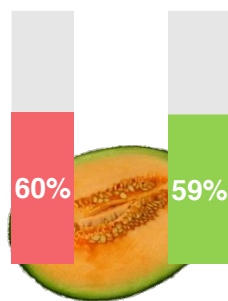


Watermelon

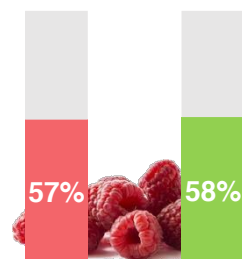
● Winter 2020 ● Summer 2019



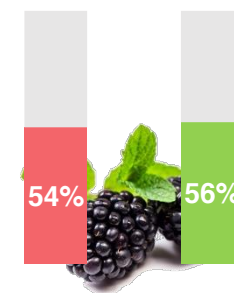
Blueberries



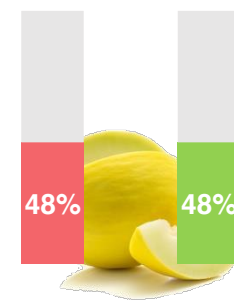
Cantaloupes



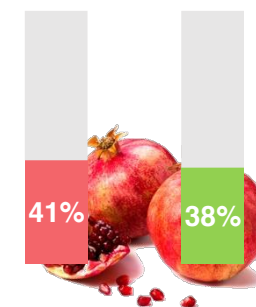
Raspberries



Blackberries



Honeydews



Pomegranates

Freshness Rankings
Summer 2019

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

Freshness Rankings
Winter 2020

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



#1 APPLE



#2 ORANGES



#3 WATERMELON

Summer 2019
Average safety score



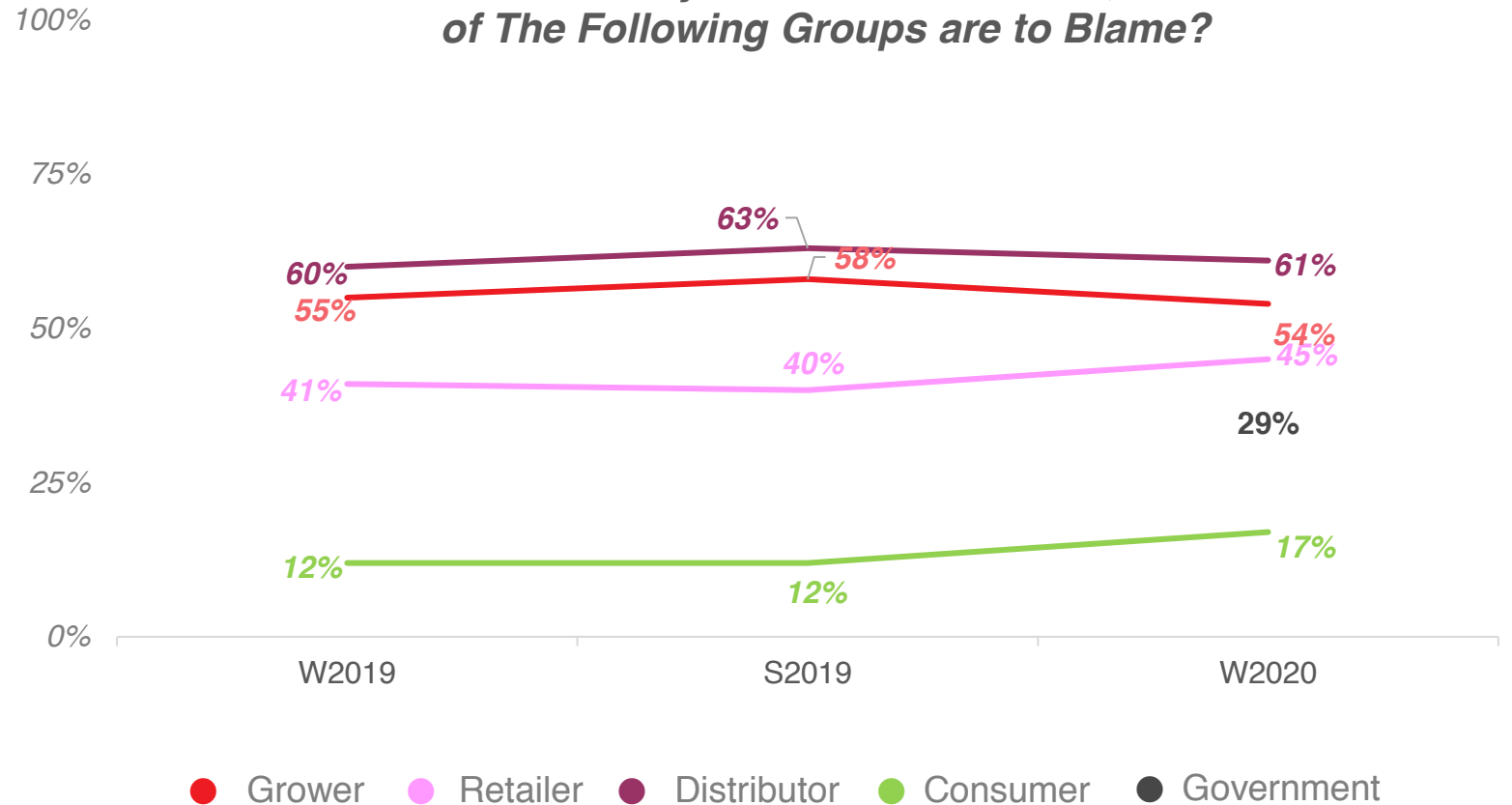
Winter 2020



**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,*

**If a Food Safety Issue Were to Occur, Which
of The Following Groups are to Blame?**



Aggregated Ratings of Fruits













Fruit	Safe (% generally think)	Value (0 – 10)	Healthy (0 – 10)
Oranges	95%	8.1	8.4
Bananas	94%	8.1	8.3
Watermelon	93%	7.5	7.6
Apples	91%	8.1	8.5
Honeydew	91%	6.8	7.2
Cantaloupe	90%	7.1	7.4
Pomegranate	89%	7.0	7.6
Blueberries	88%	7.8	8.3
Grapes	88%	7.7	7.8
Strawberries	87%	7.9	8.1
Raspberries	87%	7.4	7.8
Blackberries	86%	7.3	7.8

Source: Please rate the following fruits in terms of HOW SAFE you consider them to be.

Please rate the following fruits in terms of VALUE with 0 being "no value at all" and 10 being "extremely valuable."

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.

Primary Place Fruit is Purchased

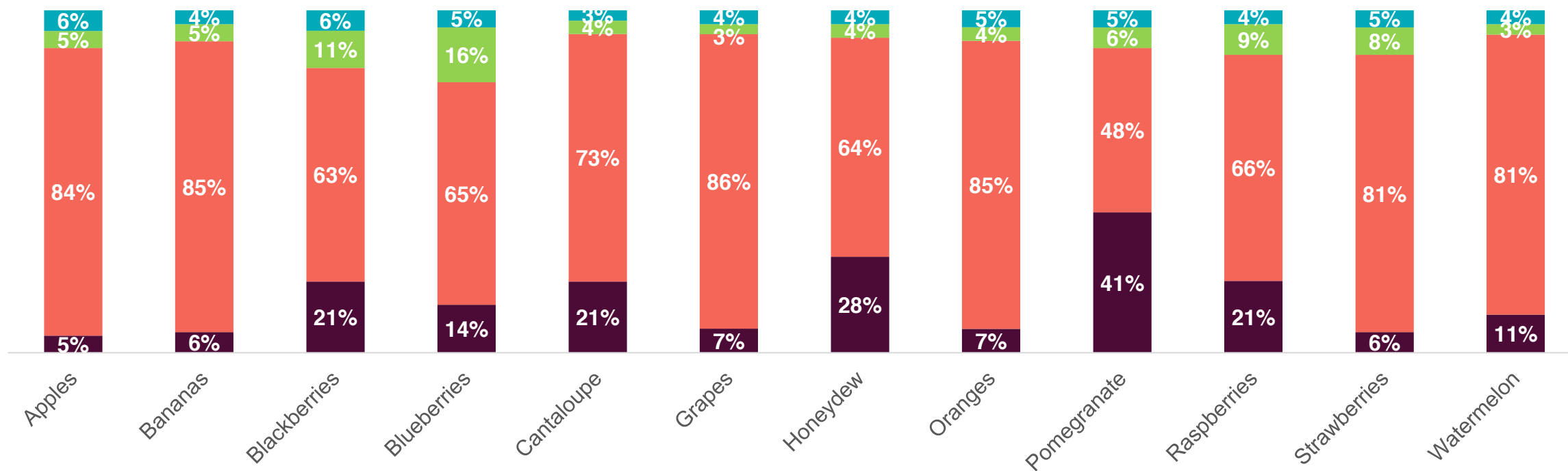
		GROCERY STORE	CLUB STORE	FARMER'S MARKET	ROADSIDE STAND	CONVENIENCE STORE
	Apples	75%	6%	12%	3%	5%
	Bananas	81%	6%	6%	2%	4%
	Blackberries	71%	5%	13%	5%	6%
	Blueberries	72%	6%	12%	4%	6%
	Cantaloupe	74%	5%	11%	4%	6%
	Grapes	80%	4%	7%	3%	5%
	Honeydew	72%	6%	13%	5%	5%
	Oranges	78%	5%	9%	3%	5%
	Pomegranate	72%	6%	11%	4%	7%
	Raspberries	72%	6%	12%	4%	6%
	Strawberries	74%	6%	11%	4%	4%
	Watermelon	74%	4%	12%	6%	5%

Source: For each of the following types of fruit, please indicate where you primarily purchased it in the Fall and Winter (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

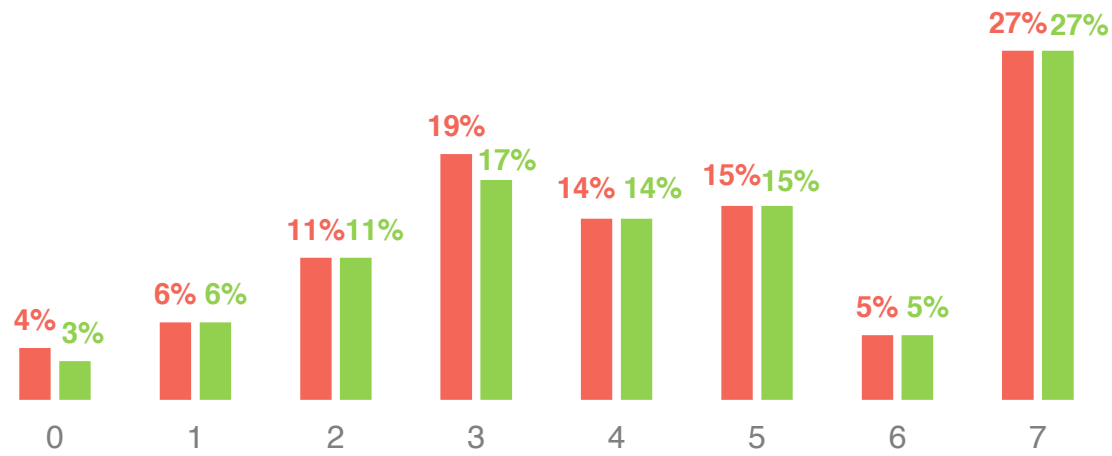
Consumption of Fruit

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

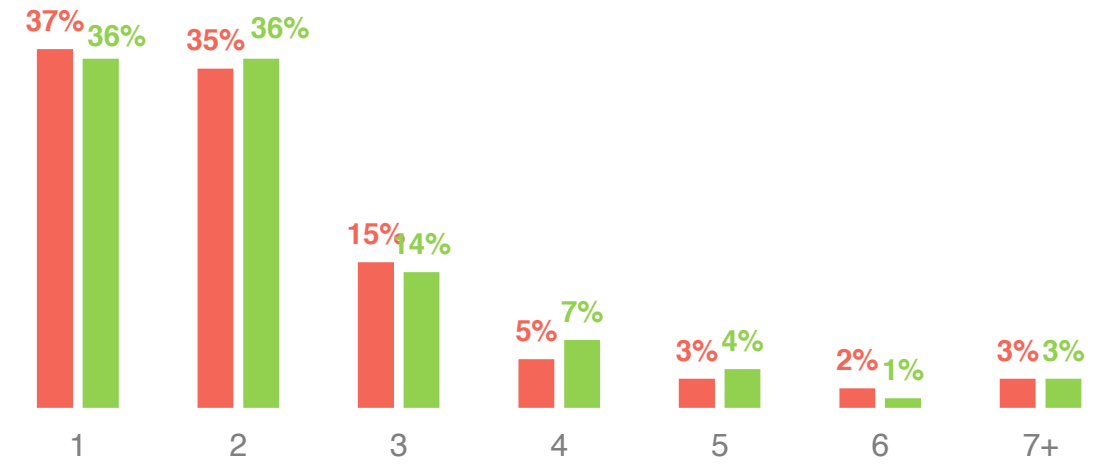


Fruit Consumption

Number of Days a Week Fruit is Consumed



*Servings of Fruit per Day
(among those consuming fruit)*



Changes In Consumption

2019

2020

51%
Eat More Fruit

52%
Eat More Fruit

4%
Eat Less Fruit

6%
Eat Less Fruit

45%
Eat The Same Amount of Fruit

42%
Eat The Same Amount of Fruit



WATERMELON ATTITUDES

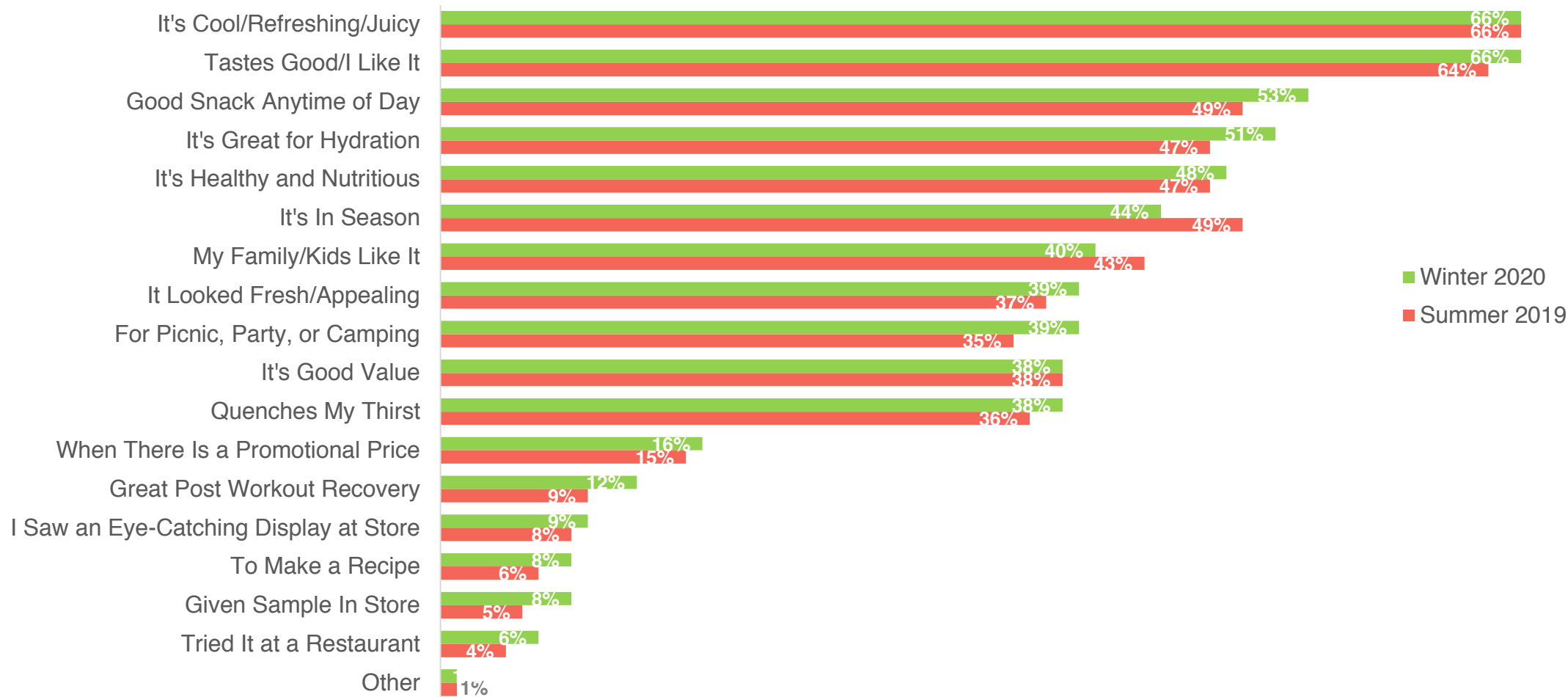
Description of Watermelon Using One Word



Reasons to Purchase Watermelon

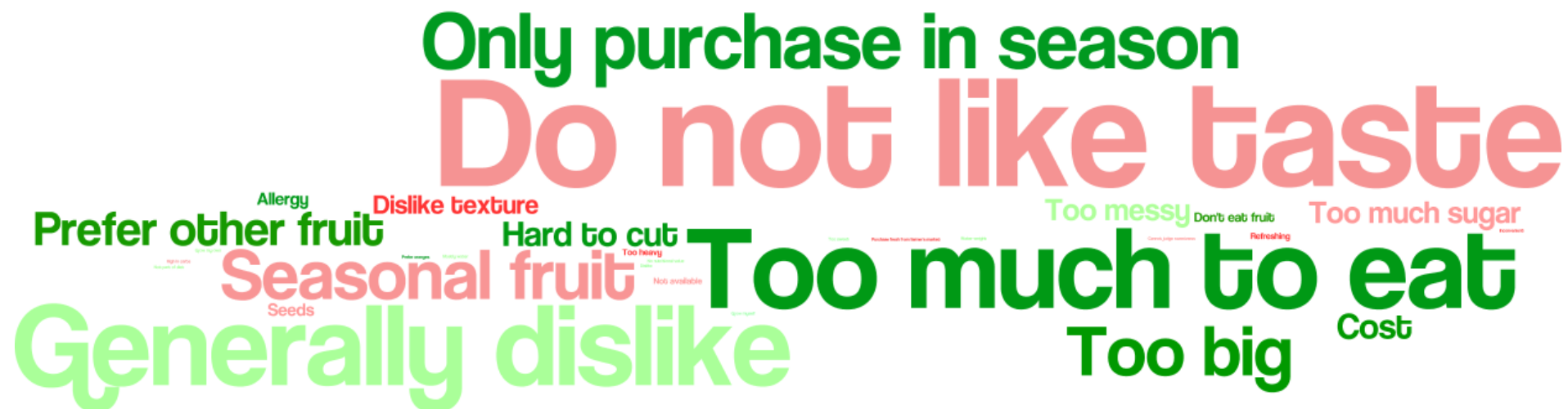


Reasons to Purchase Watermelon



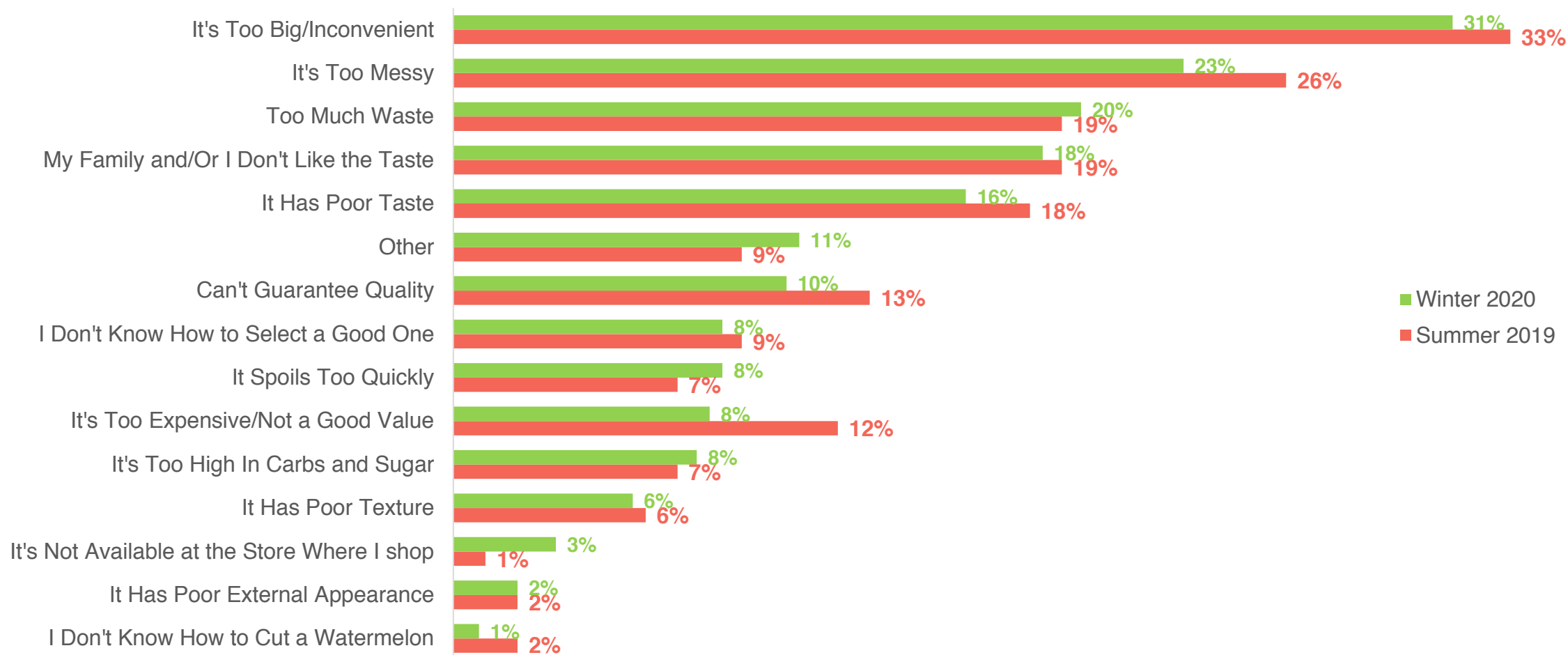
Source: What reasons do you purchase watermelon? (those who purchased watermelon)

Reasons to NOT Purchase Watermelon

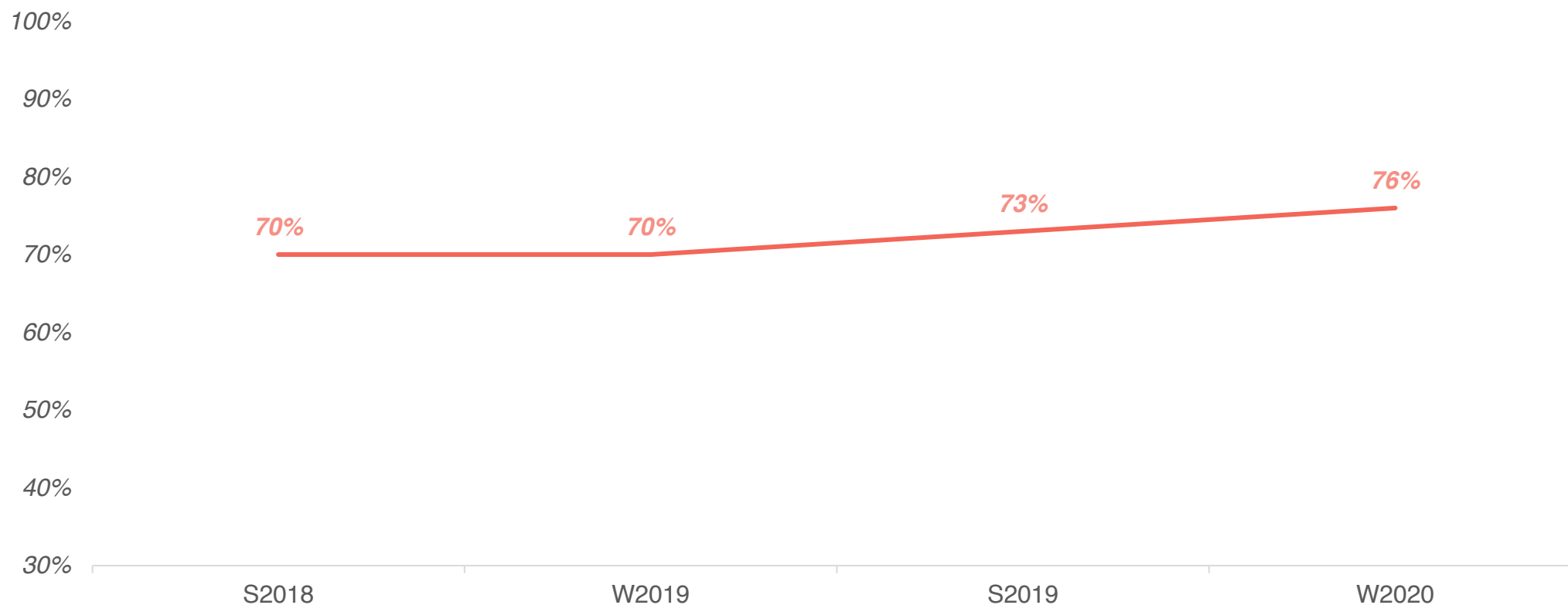


Source: What is the main reason you do not purchase watermelon? (those who have not purchased watermelon) (Only include items mentioned by 5 or more respondents.)

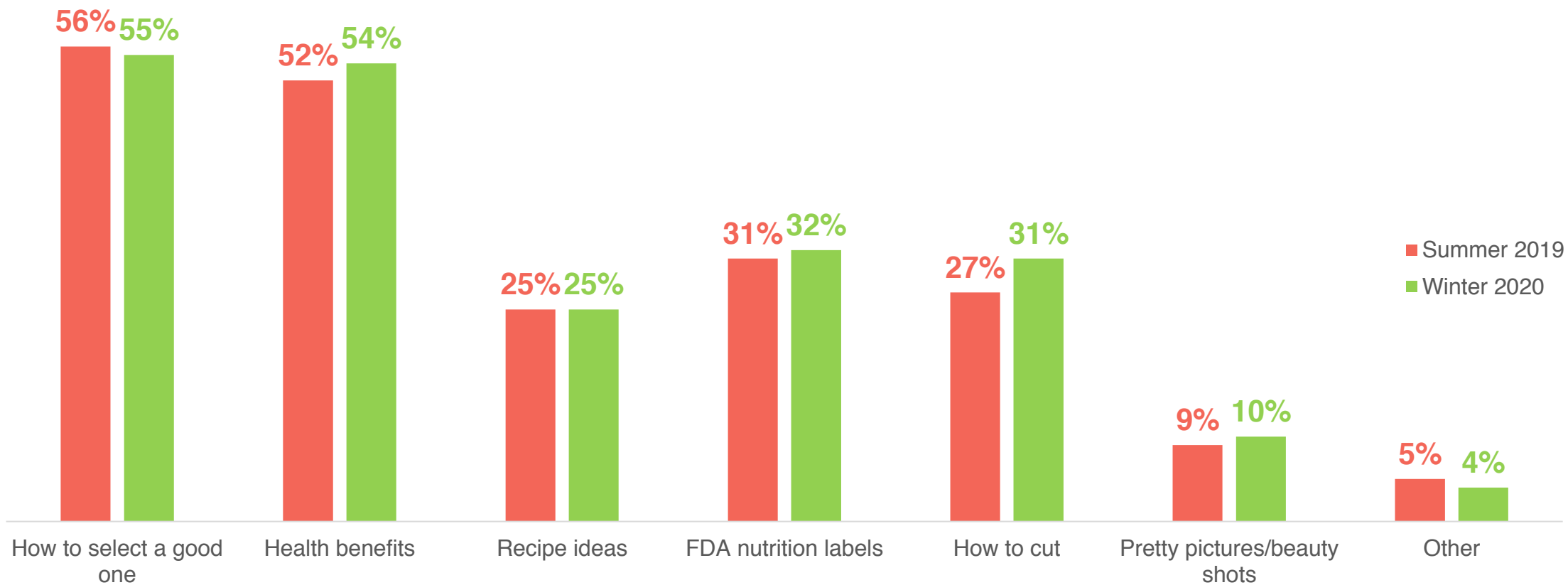
Reasons to Not Purchase Watermelon



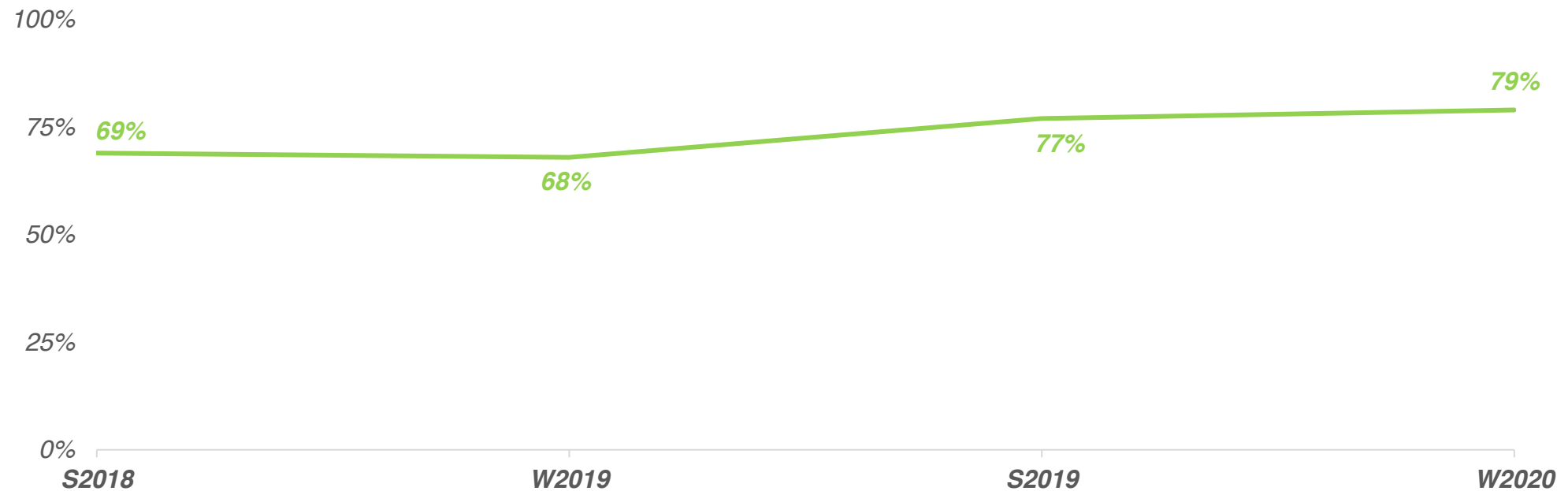
Knowing that Watermelon is Good for Hydration Leading to Purchasing More



Type of Information Respondents Would Like to See

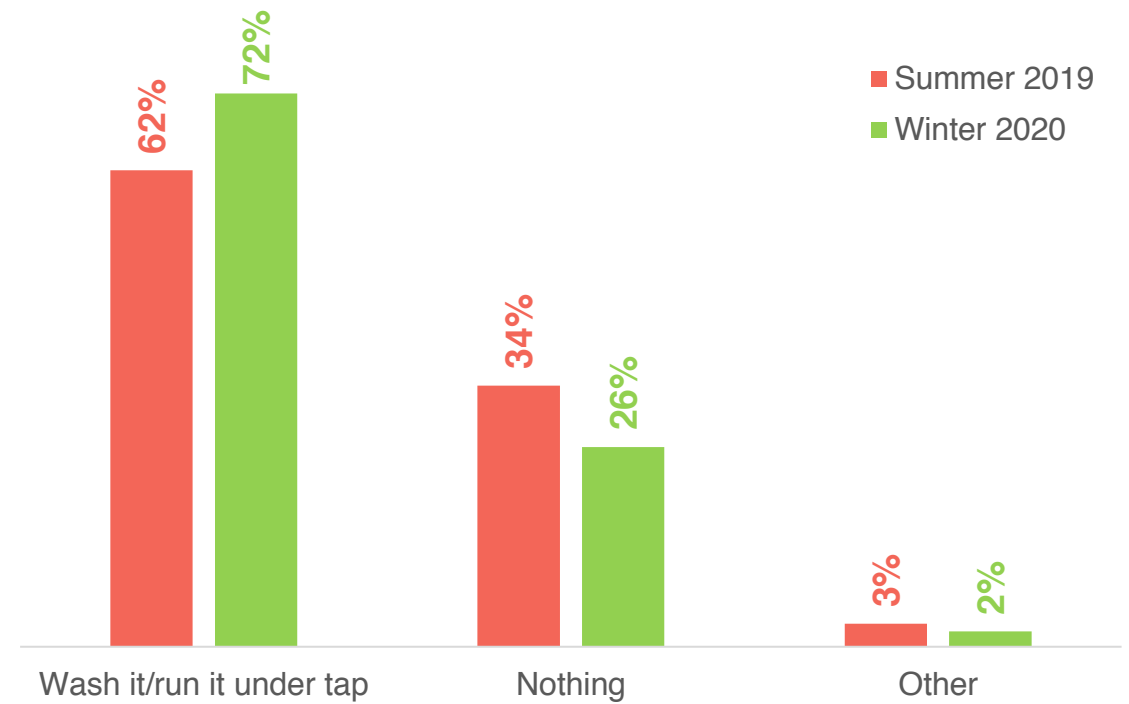


Percent Saying Yes to Knowing How to Pick a Good Watermelon



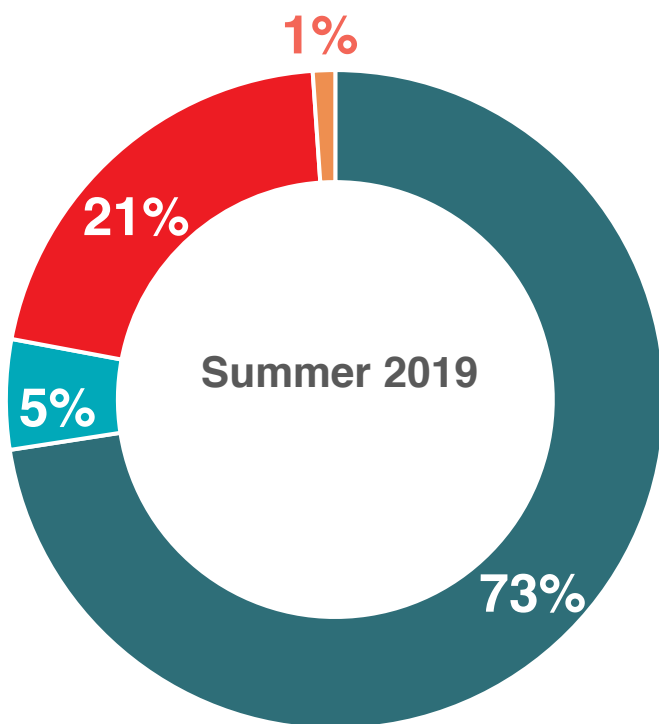


How Watermelon is Being Handled Before Consumption

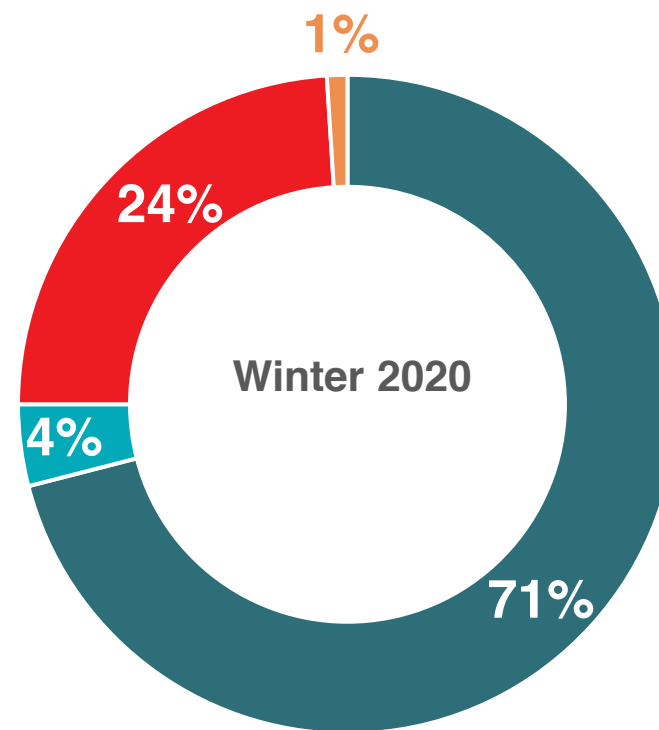


Source: What do you do with your whole watermelon before you consume it? (Those who purchase watermelon)

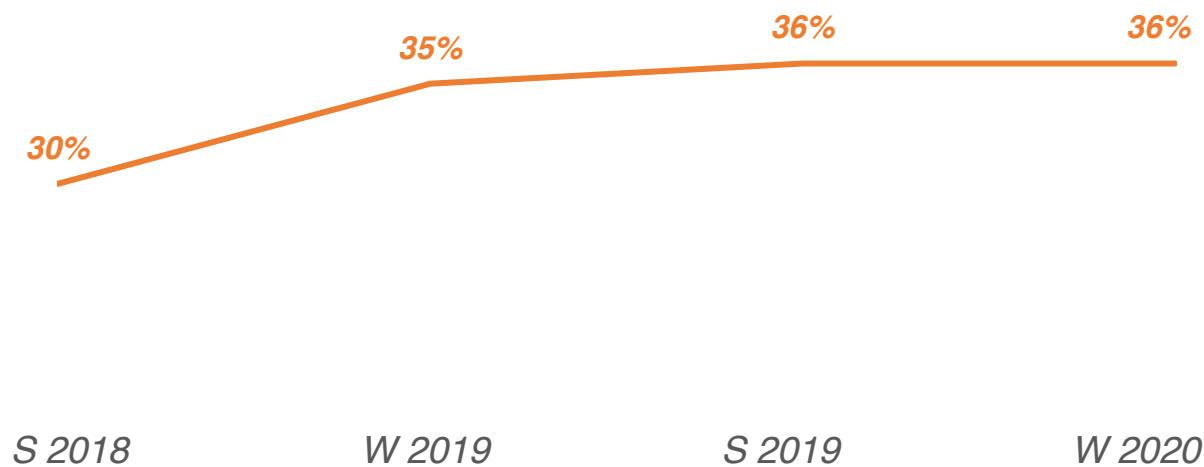
Storage of Whole Watermelon



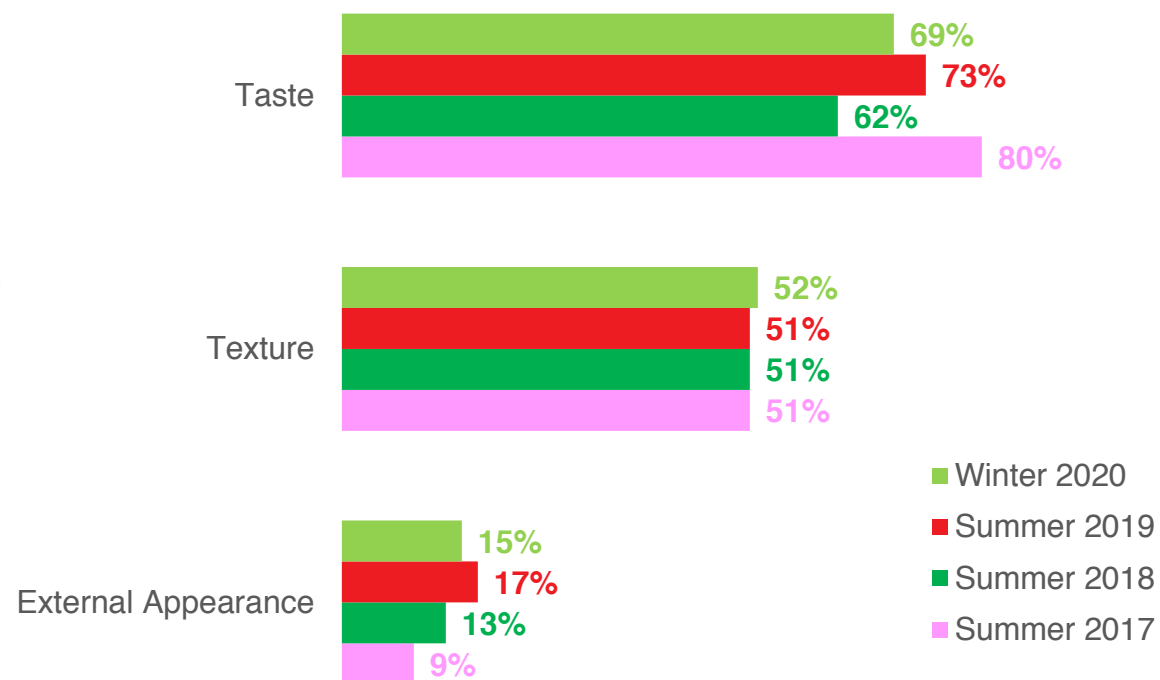
- In the fridge
- In the freezer
- On the counter
- Other

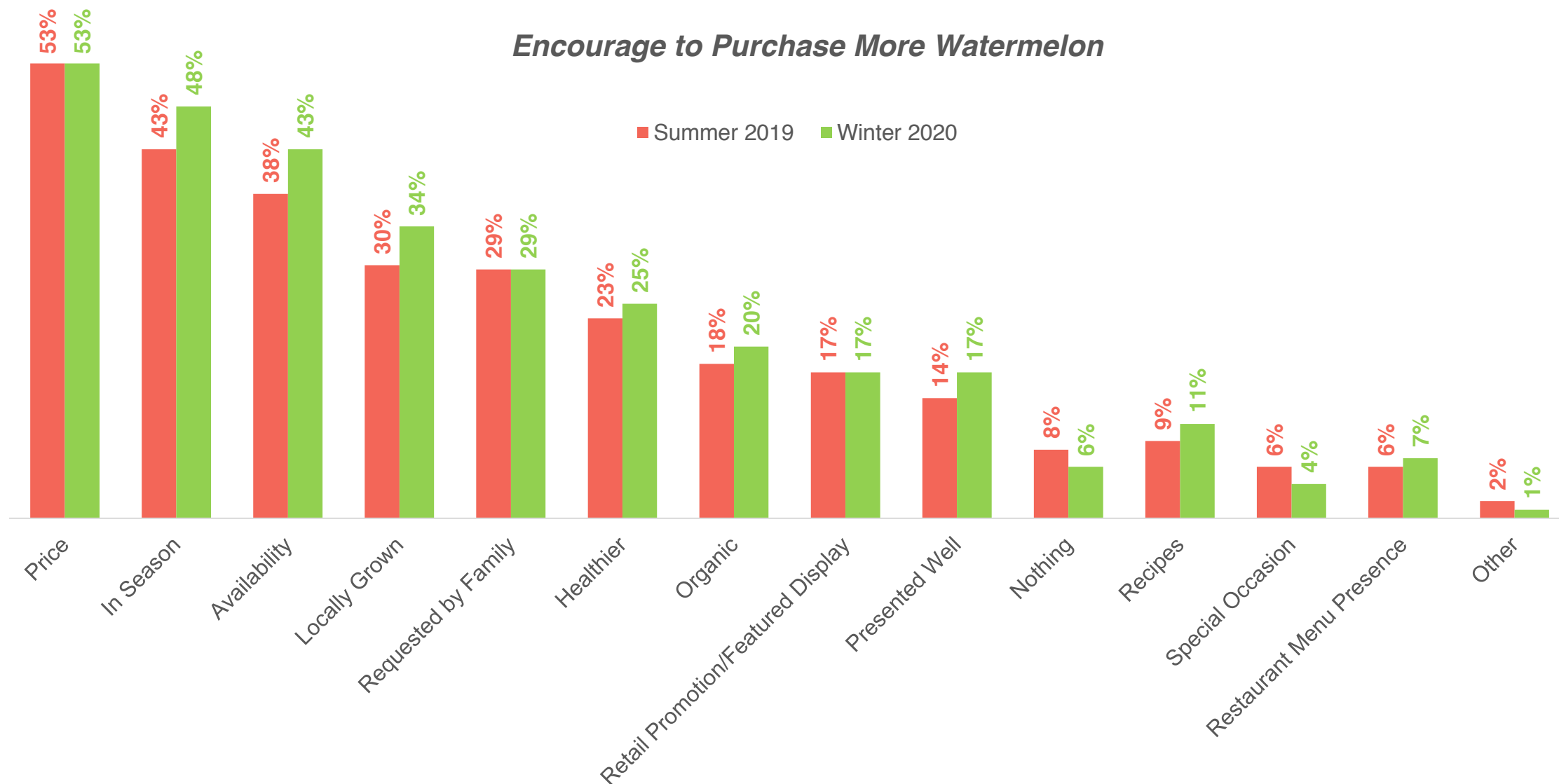


Percent Indicating Quality Issues with Watermelon Purchase

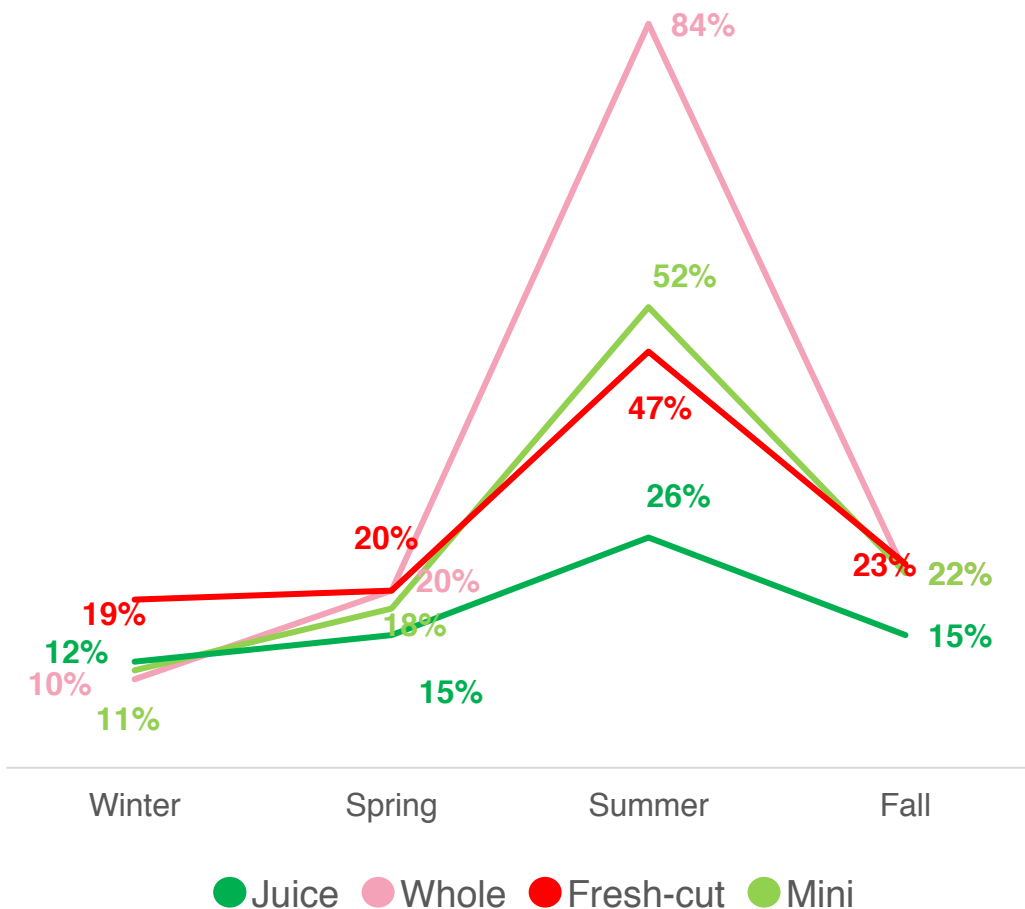


Issues with Watermelon Quality

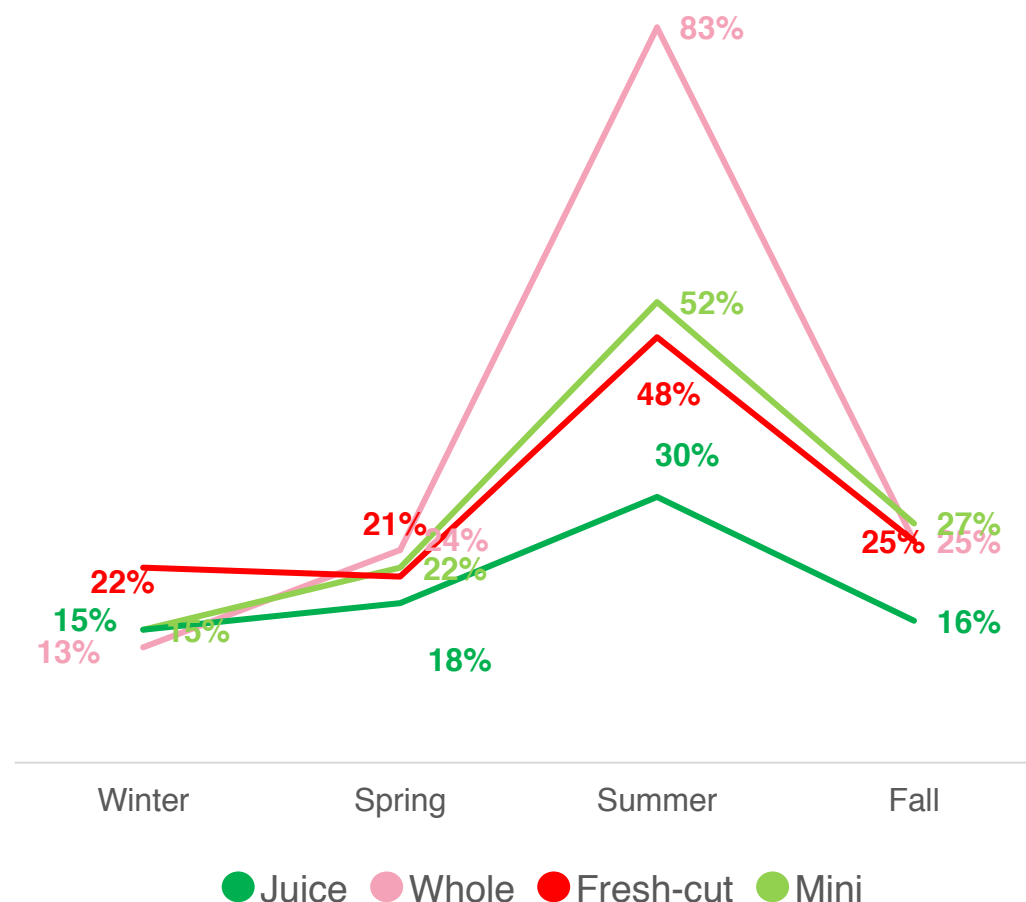




Seasons Purchased Summer 2019

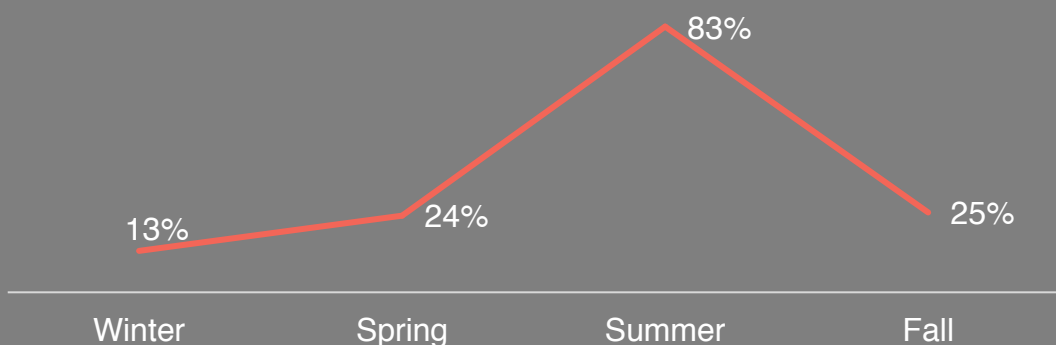


Seasons Purchased Winter 2020



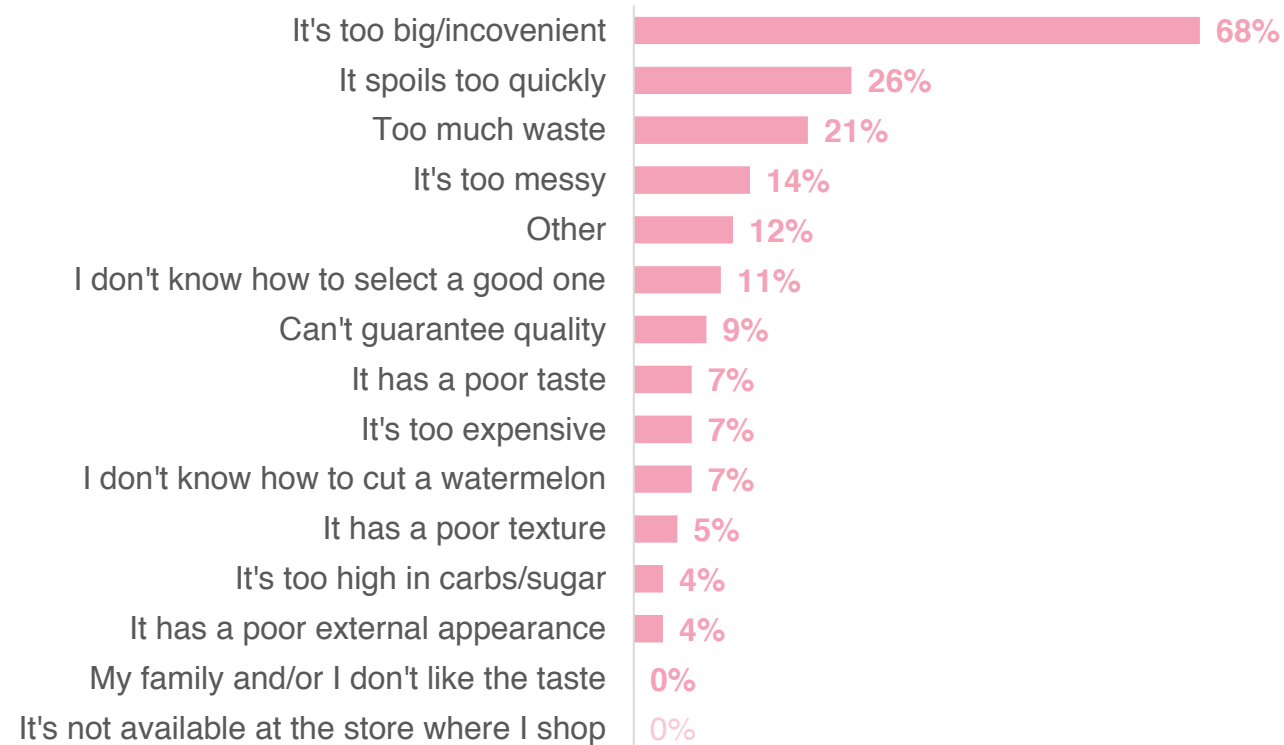
Large Watermelon

Seasons Purchased



Reasons for Not Purchasing

(Of the 6% That Do Not Purchase Type of Watermelon)

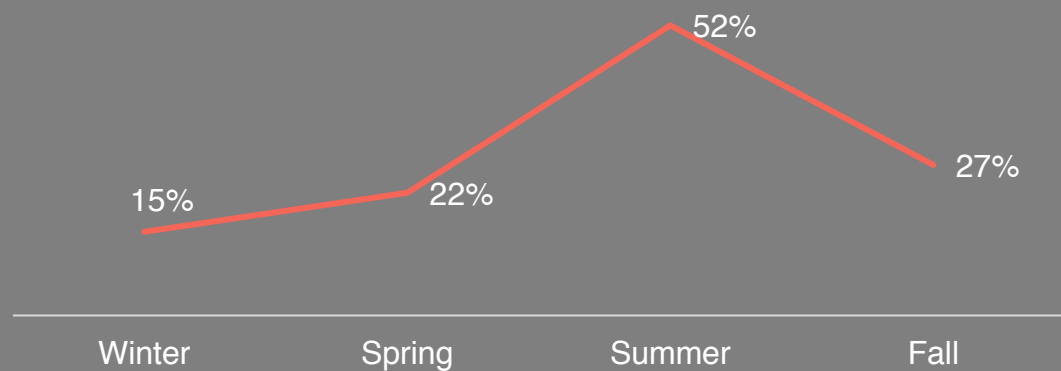


Source: Please select the seasons in which you purchase each type of watermelon (those who purchase watermelon)

Why you don't purchase whole, large or regular size watermelon. (Select all that apply) (those who do not purchase whole, large, or regular watermelon)

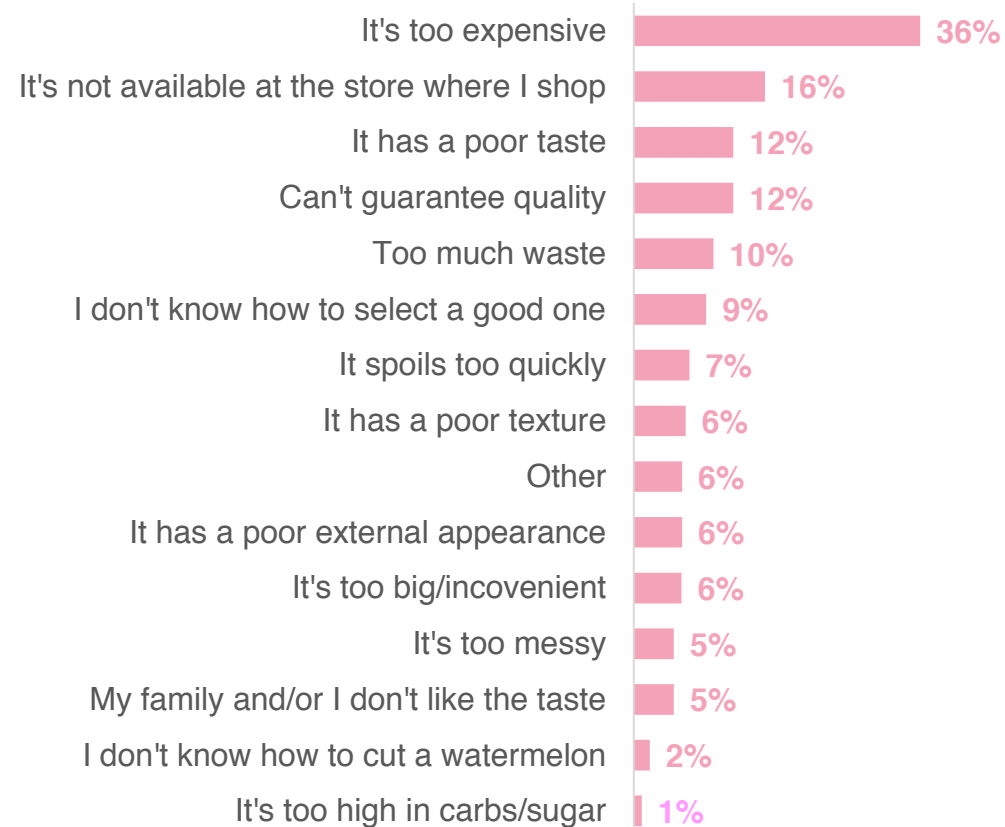
Mini Watermelon

Seasons Purchased



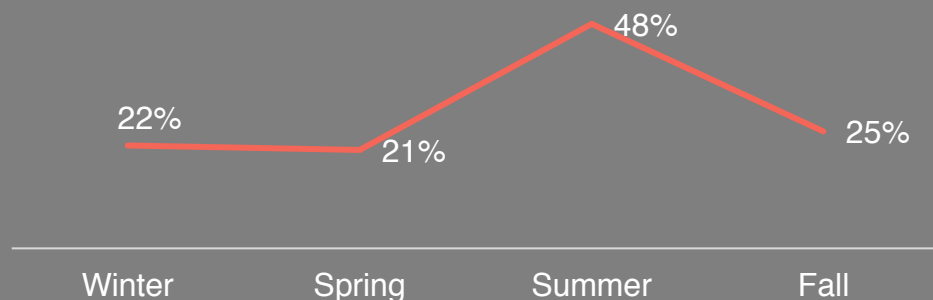
Reasons for Not Purchasing

(Of the 20% That Do Not Purchase Type of Watermelon)



Fresh Cut Watermelon

Seasons Purchased



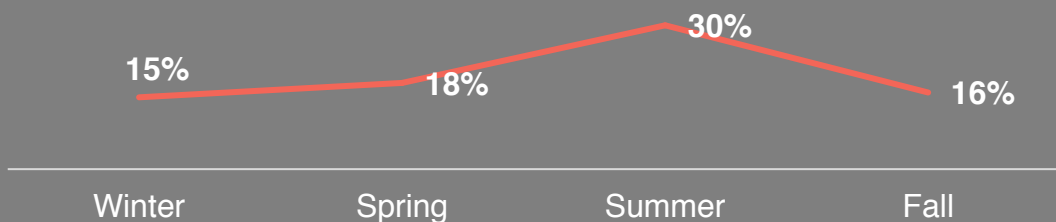
Reasons for Not Purchasing

(Of the 24% That Do Not Purchase Type of Watermelon)



Watermelon Juice

Seasons Purchased



Reasons for Not Purchasing

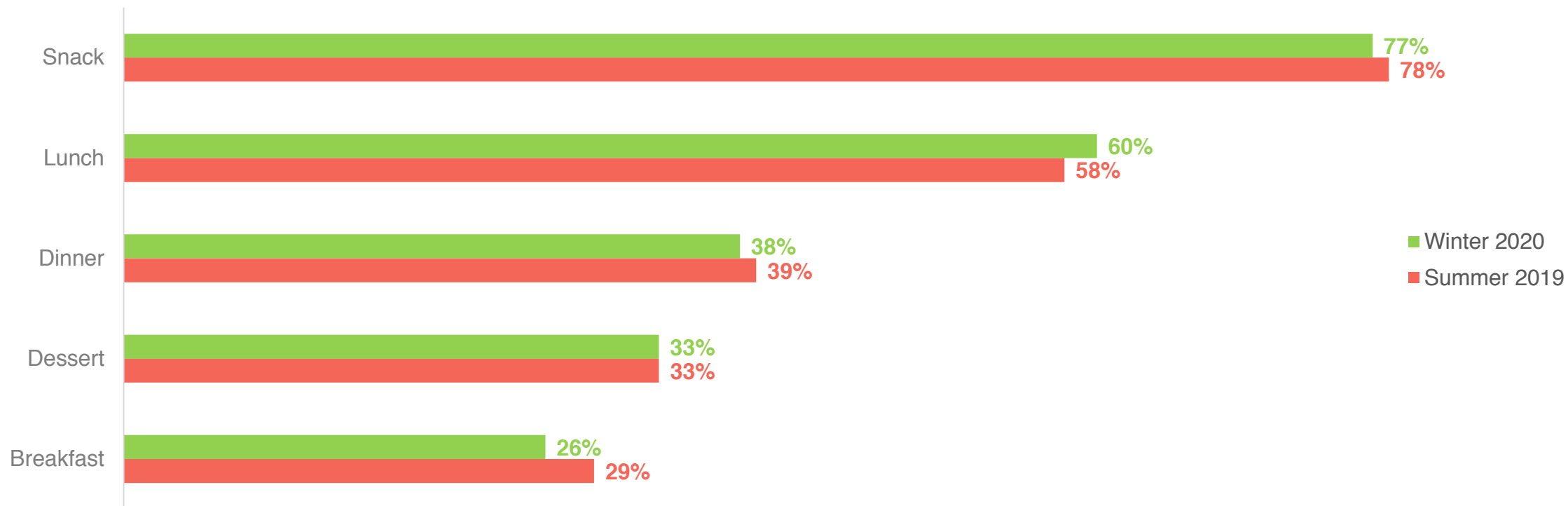
(Of the 52% That Do Not Purchase Type of Watermelon)



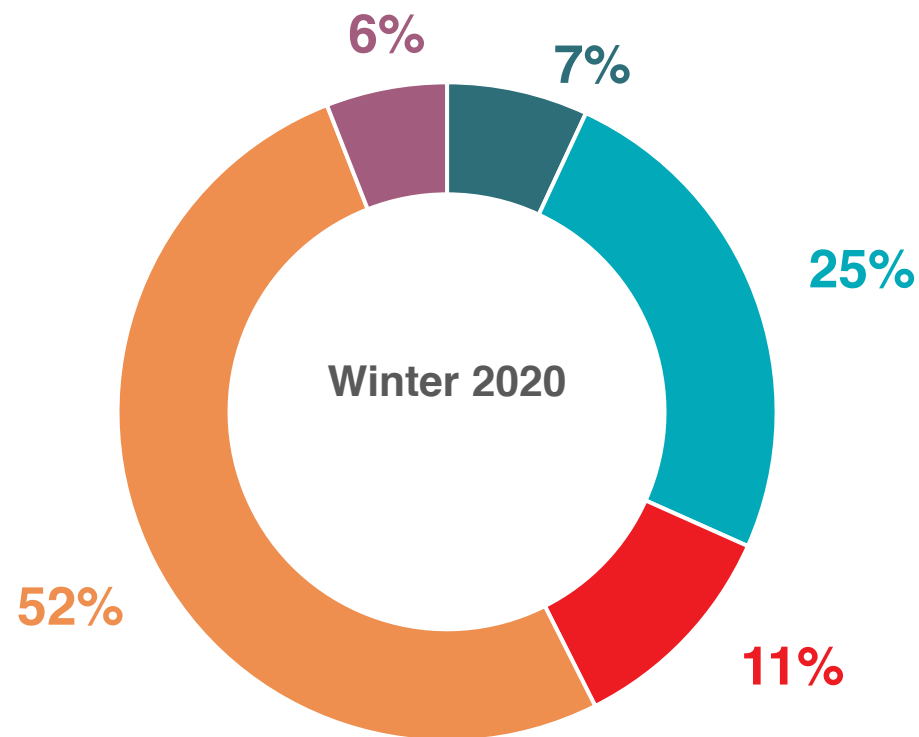
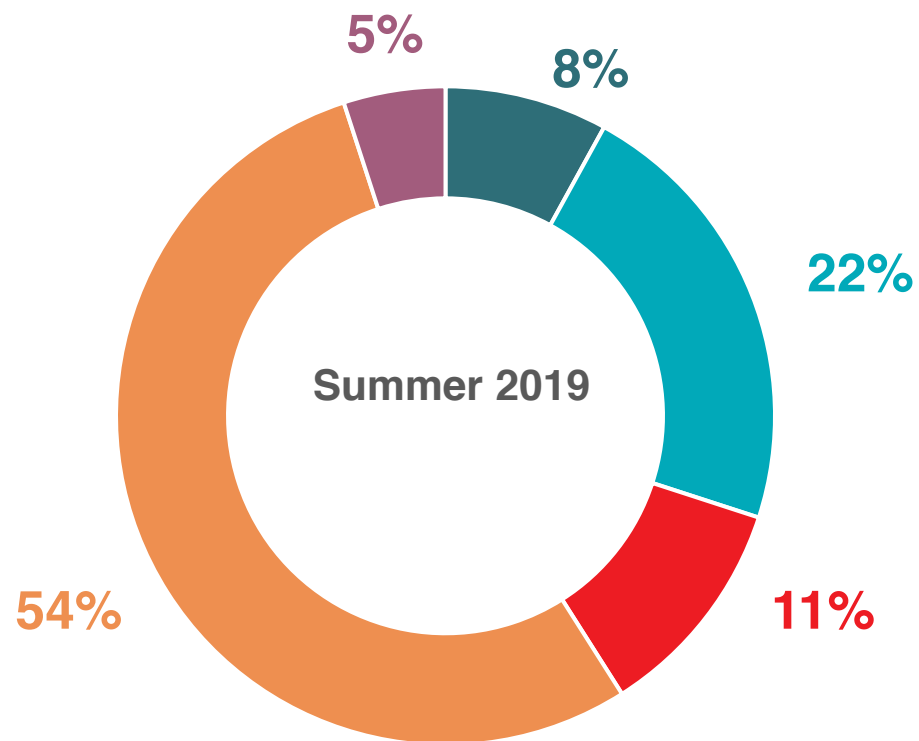


**WATERMELON
CONSUMPTION**

Time of Day Watermelon is Eaten

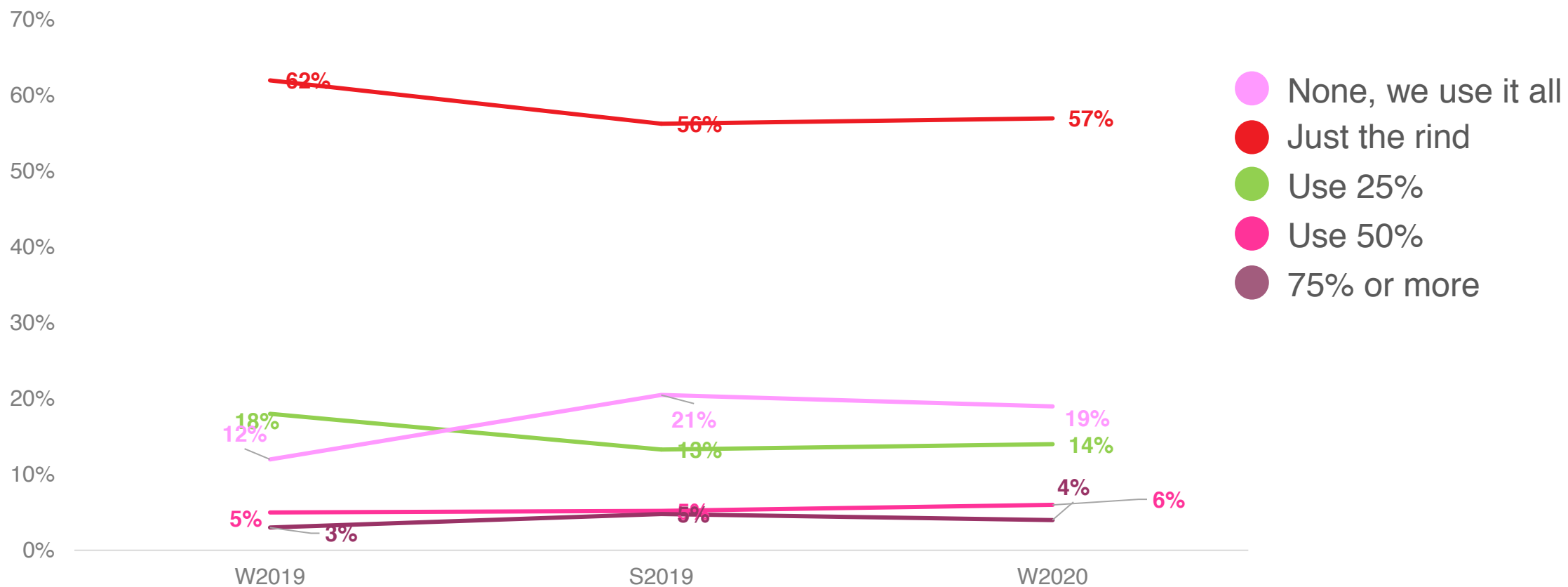


Time of Day When Majority of Watermelon is Eaten



● Breakfast ● Lunch ● Dinner ● Snack ● Dessert

Percentage of Watermelon Going to Waste



Consumption by Percentage of Time

Summer 2019

90%
Plain watermelon

10%
In a recipe

Winter 2020

90%
Plain watermelon

10%
In a recipe

Location of Consumption by Percentage of Time

Summer 2019

79%
In my home

15%
Outside my home

5%
Restaurant or other food
service location

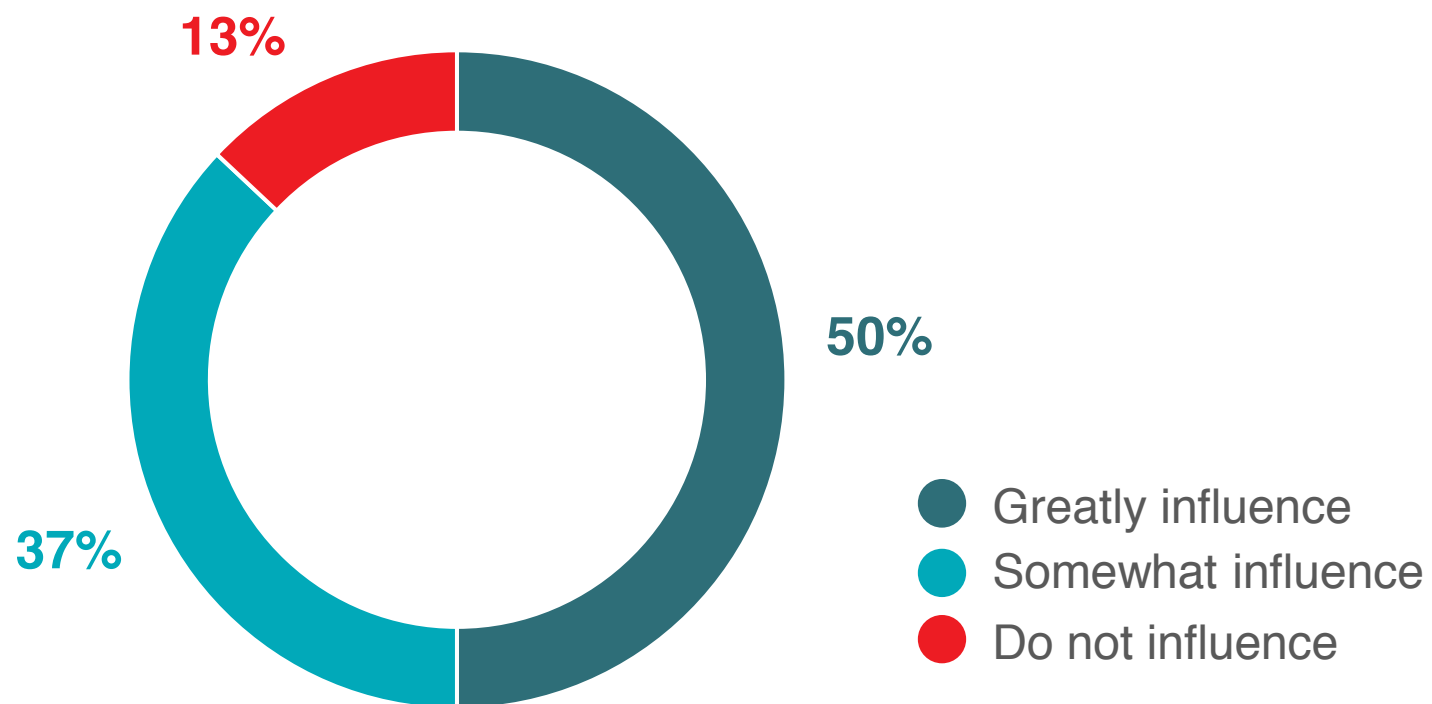
Winter 2020

79%
In my home

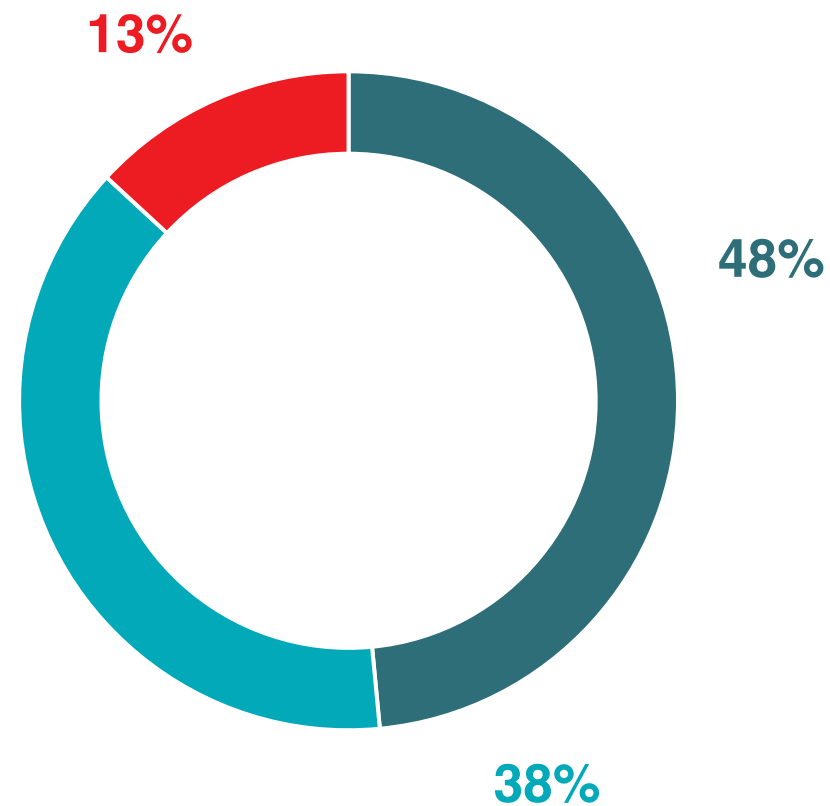
15%
Outside my home

6%
Restaurant or other food
service location

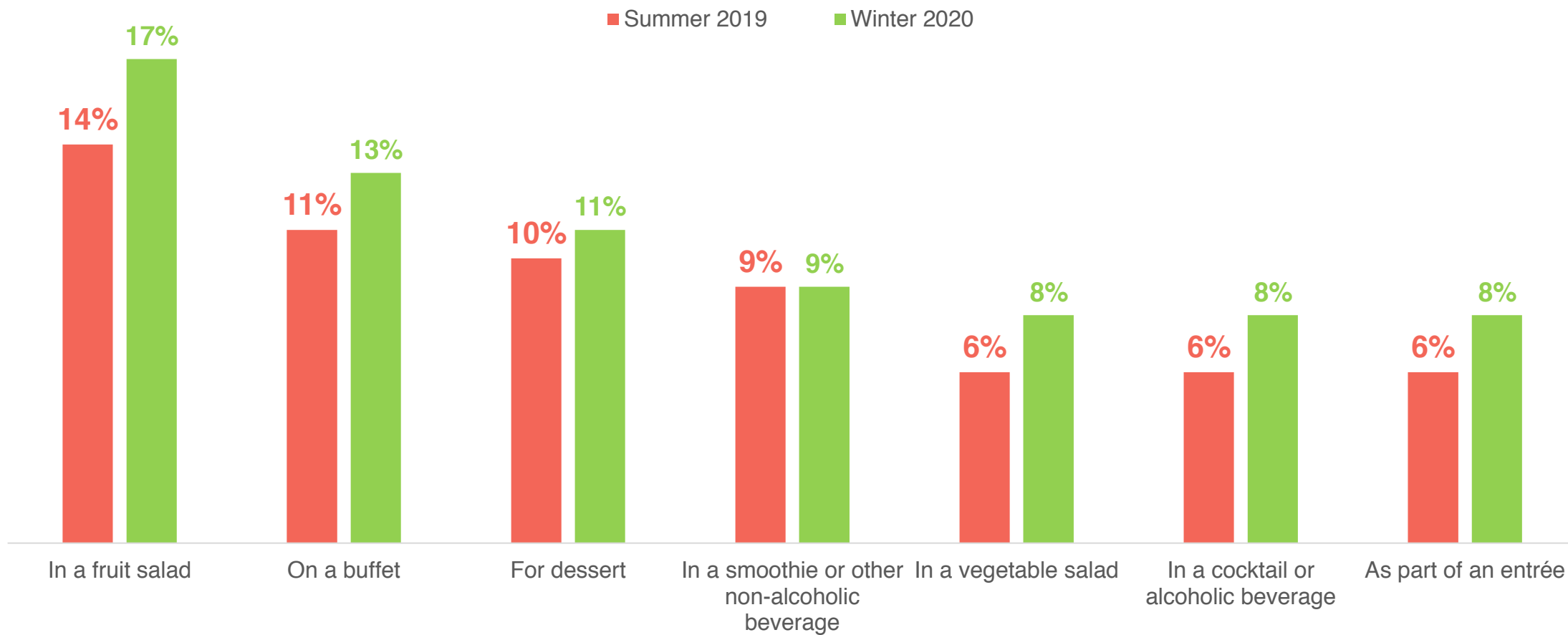
***Influence Children Have on
Watermelon Purchases Summer 2019***



***Influence Children Have on Watermelon
Purchases Winter 2020***

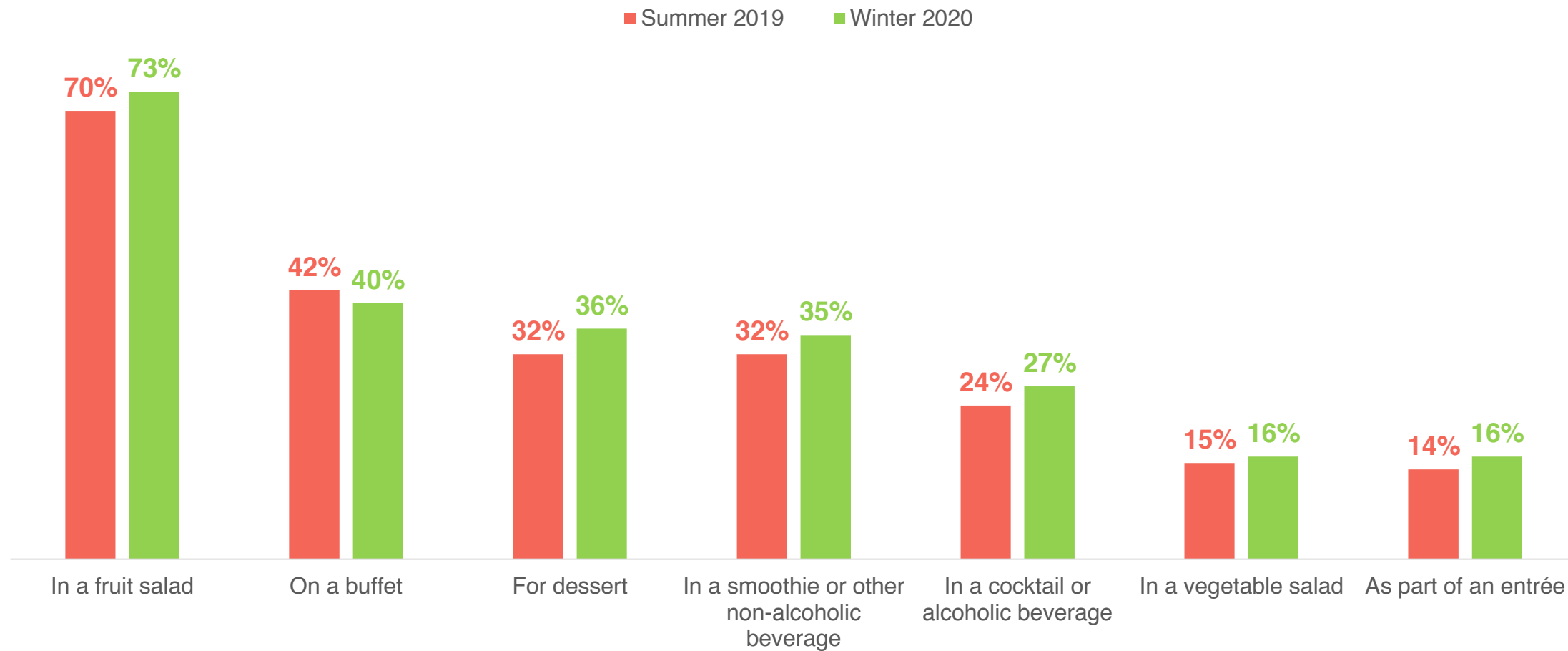


Ways Watermelon is Consumed in a Restaurant



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

Ways Watermelon is Considered in a Restaurant



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

Key Findings

- COVID-19 has not had an impact on perceptions of watermelon and other fruit.
- Watermelon scores very high relative to other fruits in terms of taste, safety, value, healthiness, and freshness.
- Watermelon attributes (health, taste, safety, value) remained steady.
- Consumers want fruit that provides them with value. They are looking for fruit where they can use all of it and use it in multiple ways.
- Taste and watermelon's refreshing qualities are the main reasons watermelon is purchased.
- Availability and perceived value are the two main reasons consumers may not purchase watermelon.
- Knowing how to pick a good watermelon is important for consumers. Data suggests that consumers are better able to select a watermelon each year.
- Growers saw decrease in blame when food quality issues arise.
- Watermelon quality issues remained steady from Summer to Winter.
- Most consumers are not eating fruit daily nor are they eating more than one or two servings. However half of the consumers indicate they intend to eat more fruit in the next year.
- How to select and health benefits are the key points consumers would like to see displayed with watermelon at retail.

Aimpoint *Research*TM

Columbus | +1.614.225.6300

Italy | +39.02.365.532.91

info@AimpointResearch.com

