



NATIONAL WATERMELON PROMOTION BOARD

Summer Consumer Research Findings

September 2020



AimpointResearch.com

PURPOSE

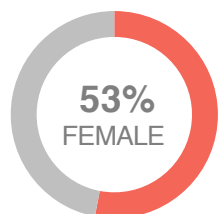
To design and implement a consumer tracking survey to enable the National Watermelon Promotion Board to grow demand

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



Demographics of Respondents 1124 Completes

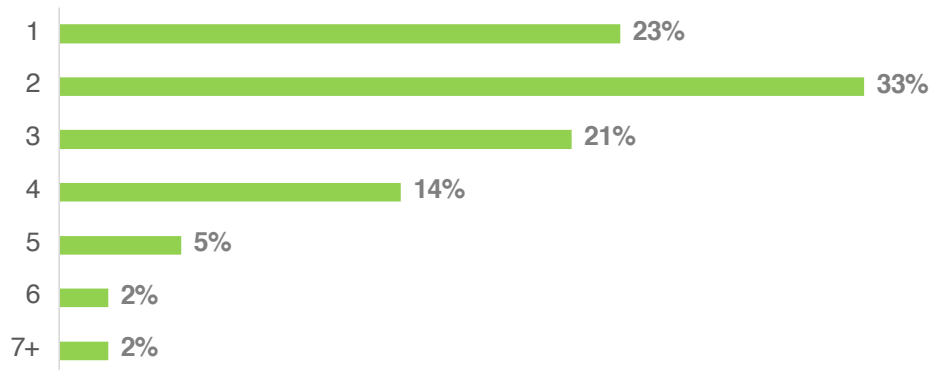


Gender

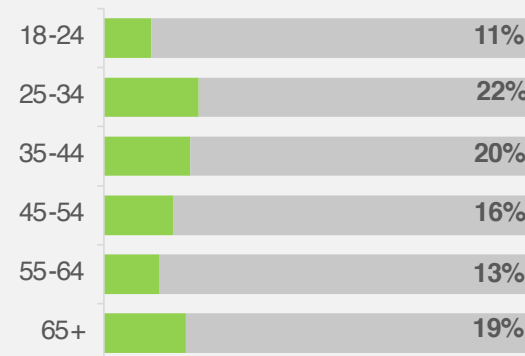


The Primary Food Shopper

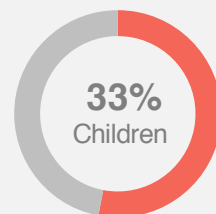
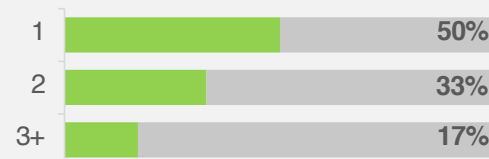
Number of People Living in Household



Age

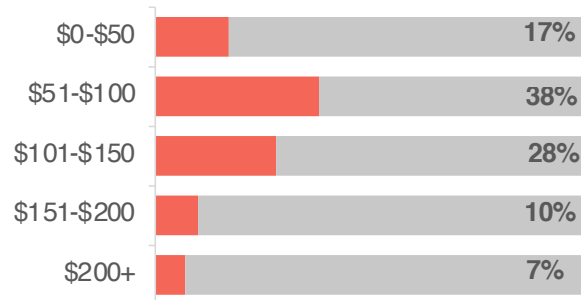


Number of Children (among those with children)

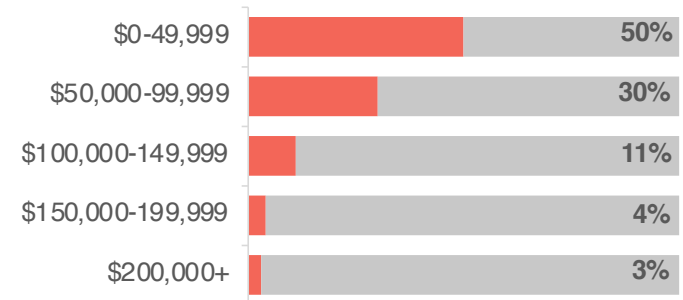


Demographics of Respondents (n=1124)

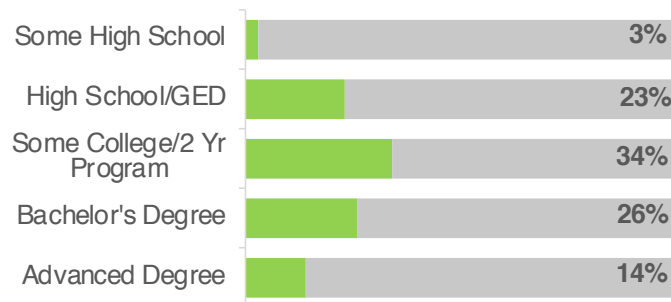
Weekly Grocery Spend



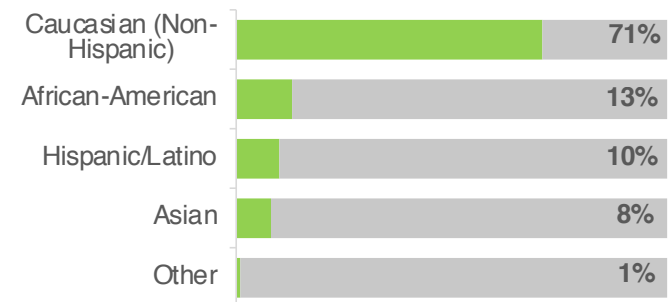
Household Income



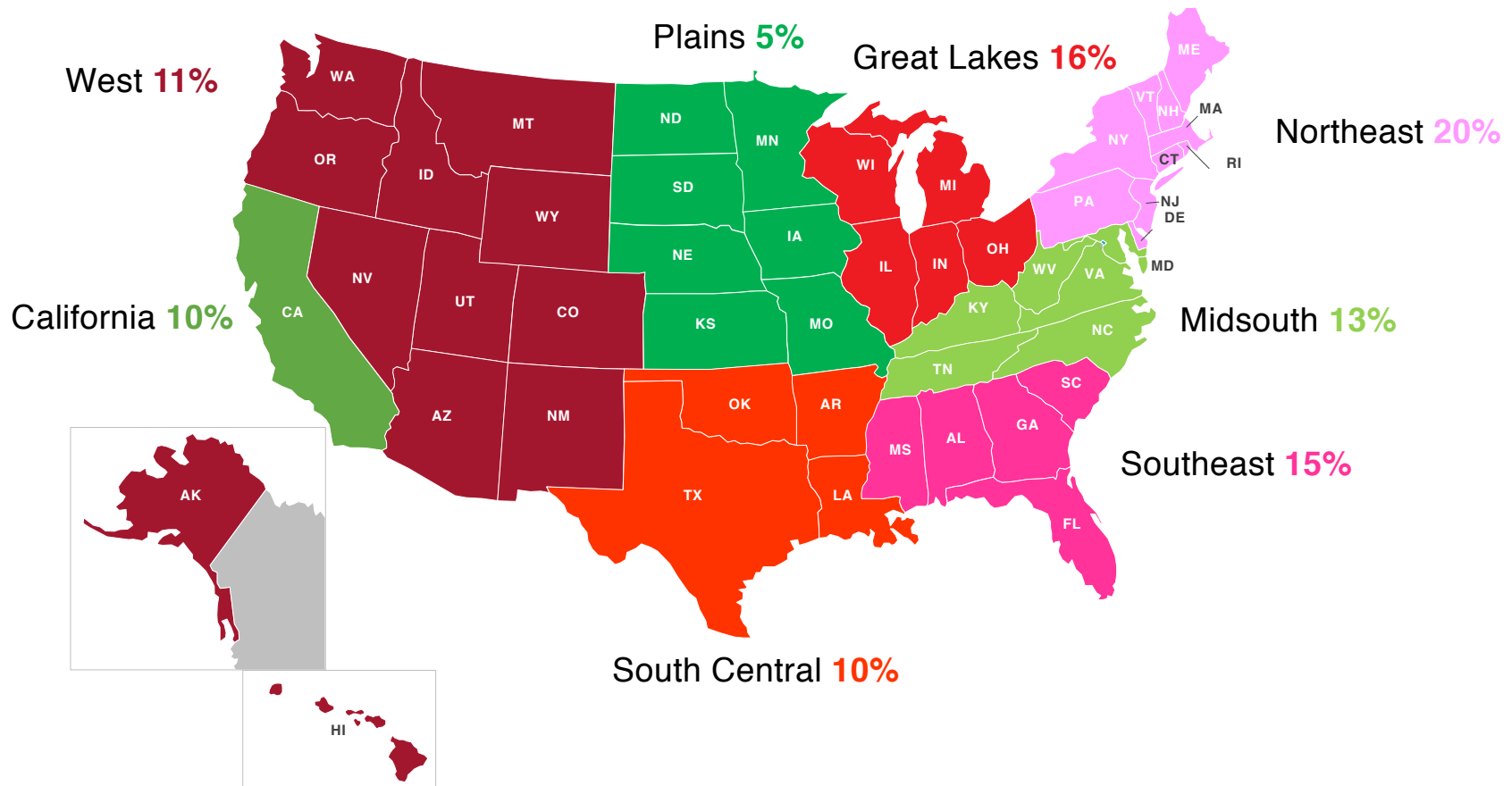
Education Level



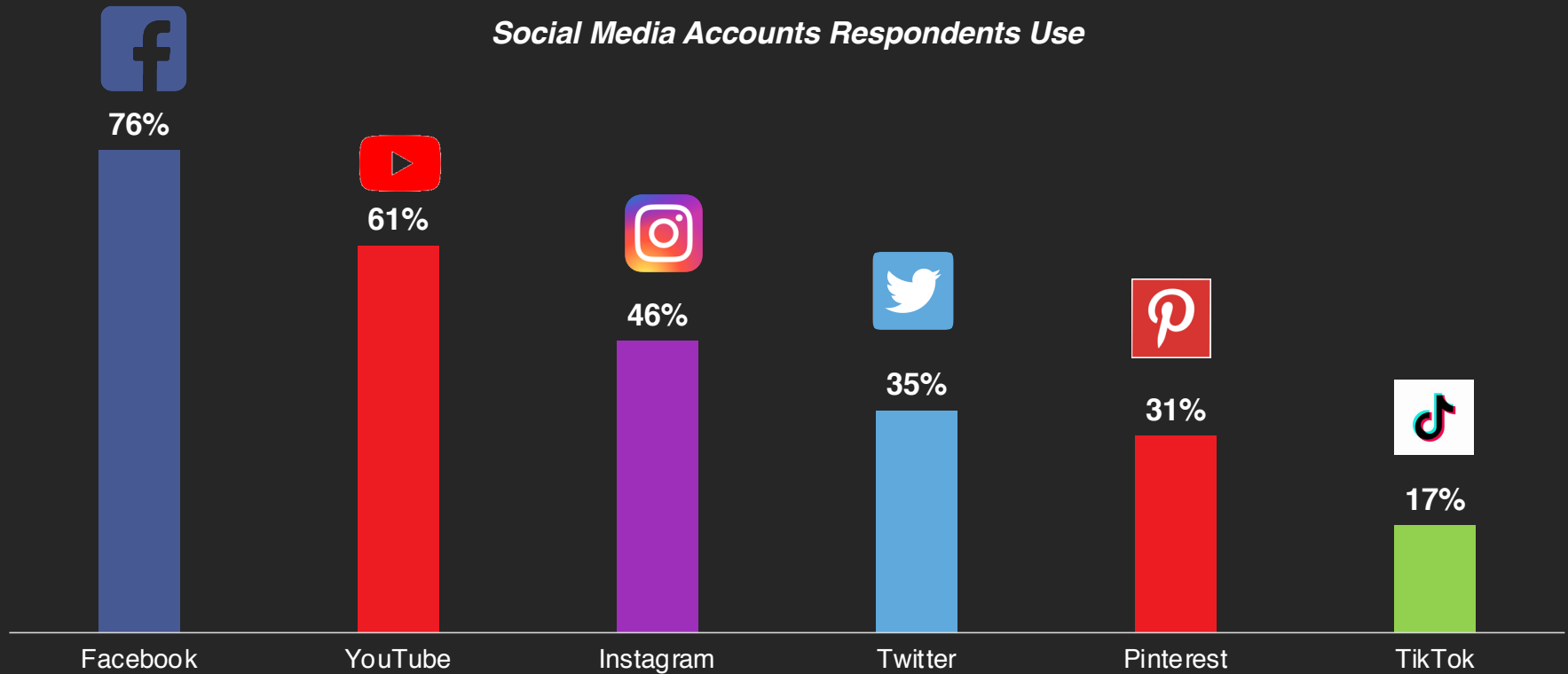
Race/Ethnicity



Demographics of Respondents (n=1124)



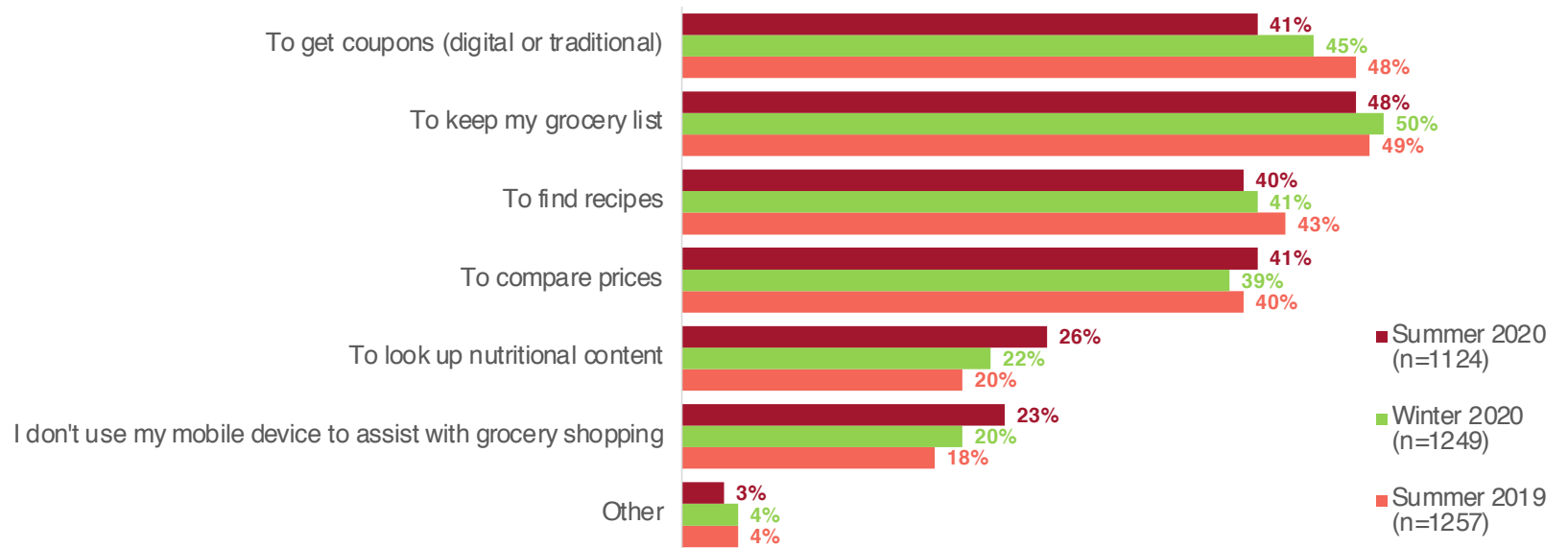
Social Media Accounts Respondents Use



Source: Total Respondents (n=1124)
Which if any, of the following social media sites do you belong? (select all that apply)



Ways Used Mobile Device to Assist With Your Grocery Shopping

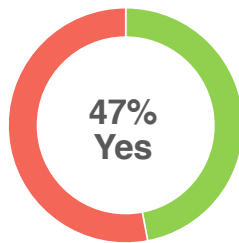


Source: Total Respondents

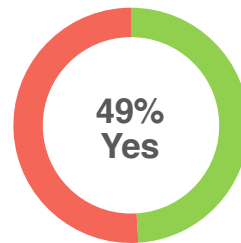
Please indicate below how you have used your mobile device to assist you with your grocery shopping? (Select all that apply)



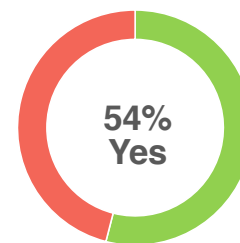
Ever Used Grocery Pick-up, Delivery, or Meal Kit Delivery



Summer 2019
(n=1257)



Winter 2020
(n=1249)



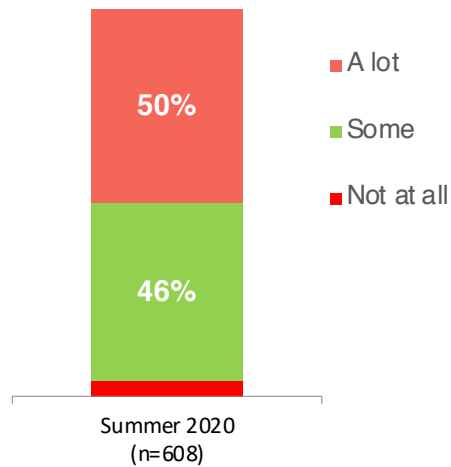
Summer 2020
(n=1124)

Source: Total Respondents

Have you ever used a grocery pick-up or grocery delivery service? Examples include Amazon Fresh, Wal-Mart Grocery Pickup, and Instacart.



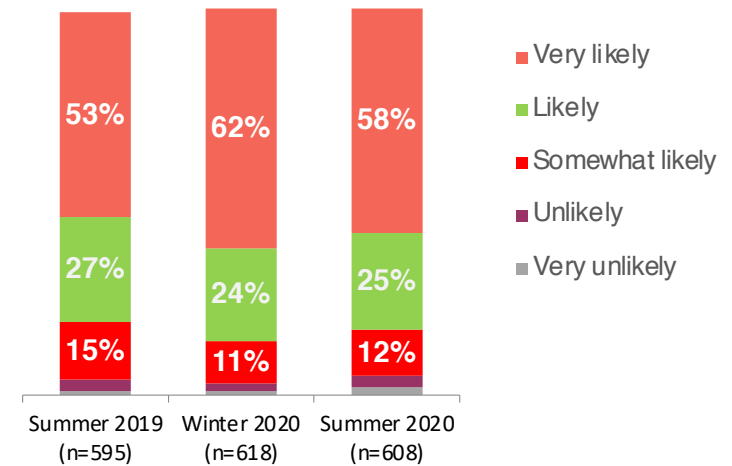
Trust to Select Produce



Services used in past 12 months

- Delivery from retail location (63%)
- Curbside pick-up (55%)
- Third party delivery (44%)
- Other (2%)

Likelihood to Continue Using

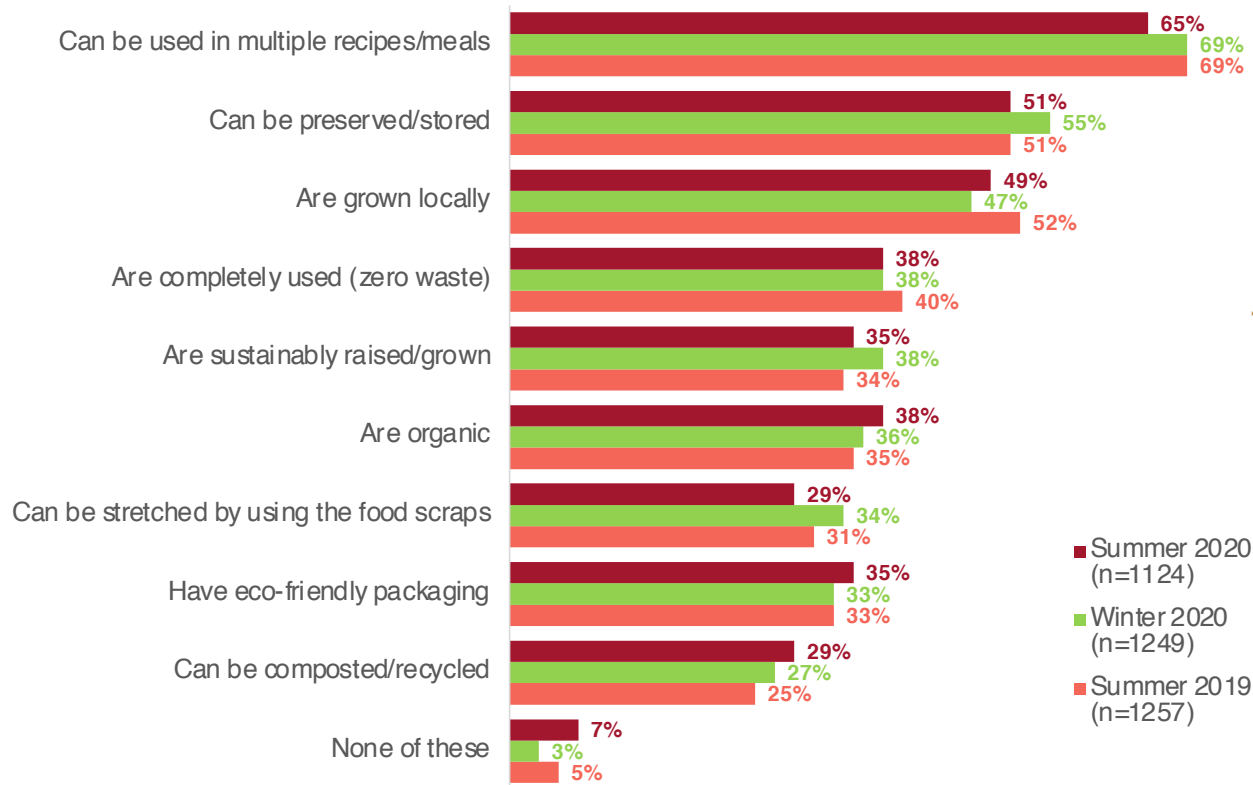


Source: Total Respondents Ever Using Grocery Pick-up or Delivery
 Which of the following grocery pick-up or grocery delivery services have you used in the past 12 months? (Select all that apply)
 How much do you trust the person who is selecting your produce for your grocery pick-up/delivery order to select quality produce?
 How likely are you to continue using grocery pick-up or grocery delivery service in the next 12 months?



FRUIT ATTITUDES & CONSUMPTION

I Feel Better When I Purchase Food That ...



■ Summer 2020
(n=1124)
■ Winter 2020
(n=1249)
■ Summer 2019
(n=1257)



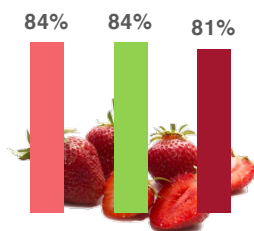
Source: Total Respondents
I feel better when I make food purchases that: (Select all that apply)

Fruits Purchased in Spring/Summer 2020

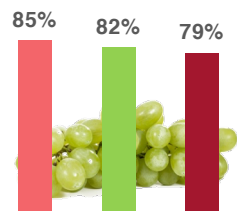


Source: Total Respondents (n=1124)
For each of the following types of fruit, please indicate where you have primarily purchased it in the Spring and Summer?

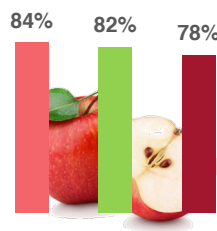
Percent of People That Like the Taste of ...



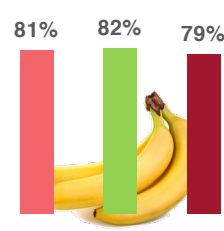
Strawberries



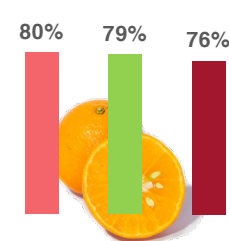
Grapes



Apples



Bananas

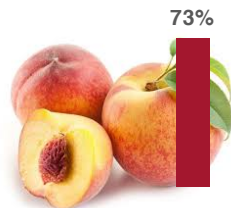


Oranges

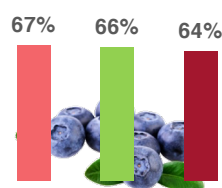
● Summer 2019 (n=1257) ● Winter 2020 (n=1249) ● Summer 2020 (n=1124)



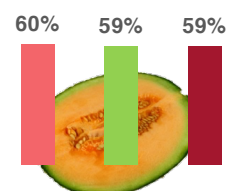
Watermelon



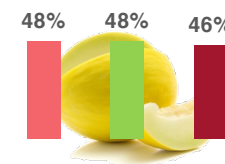
Peaches



Blueberries



Cantaloupes



Honeydews

Freshness Rankings - Summer 2020

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

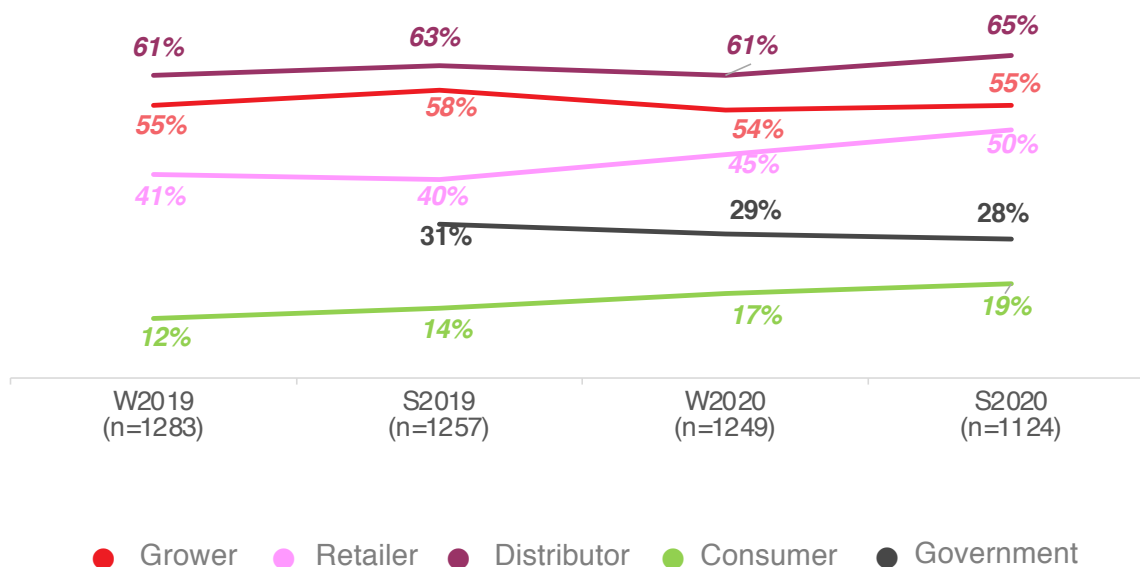
Source: Total Respondents (n=1124)
Please rank the following fruits by how long each will stay fresh before you consume them (1) freshest to least fresh (10).



Average Safety Score



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



Source: Total Respondents

On a scale from 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? (Select up to 3)

Aggregated Ratings of Fruits

Fruit	Safe (% generally think)	Value (0 – 10)	Healthy (0 – 10)
Bananas	95%	8.1	8.2
Oranges	95%	8.0	8.4
Apples	94%	8.0	8.3
Watermelon	94%	7.5	7.8
Blueberries	93%	7.8	8.2
Peaches	93%	7.6	7.8
Grapes	92%	7.6	7.8
Cantaloupe	92%	7.2	7.7
Honeydew	92%	6.9	7.4
Strawberries	91%	7.9	8.0











Source: Total Respondents (n=1124)

Please rate the following fruits in terms of HOW SAFE you consider them to be. (Generally Safe, Generally Unsafe)

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 fruits in terms of HOW HEALTHY you consider them to be on a scale from 0-10 with 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	67%	6%	11%	4%	4%
	Bananas	73%	6%	8%	3%	5%
	Blueberries	57%	6%	12%	5%	6%
	Cantaloupe	53%	6%	11%	5%	4%
	Grapes	69%	5%	9%	4%	5%
	Honeydew	42%	5%	9%	5%	5%
	Oranges	65%	6%	8%	4%	6%
	Peaches	56%	6%	13%	6%	4%
	Strawberries	62%	7%	14%	5%	6%
	Watermelon	58%	6%	13%	7%	5%

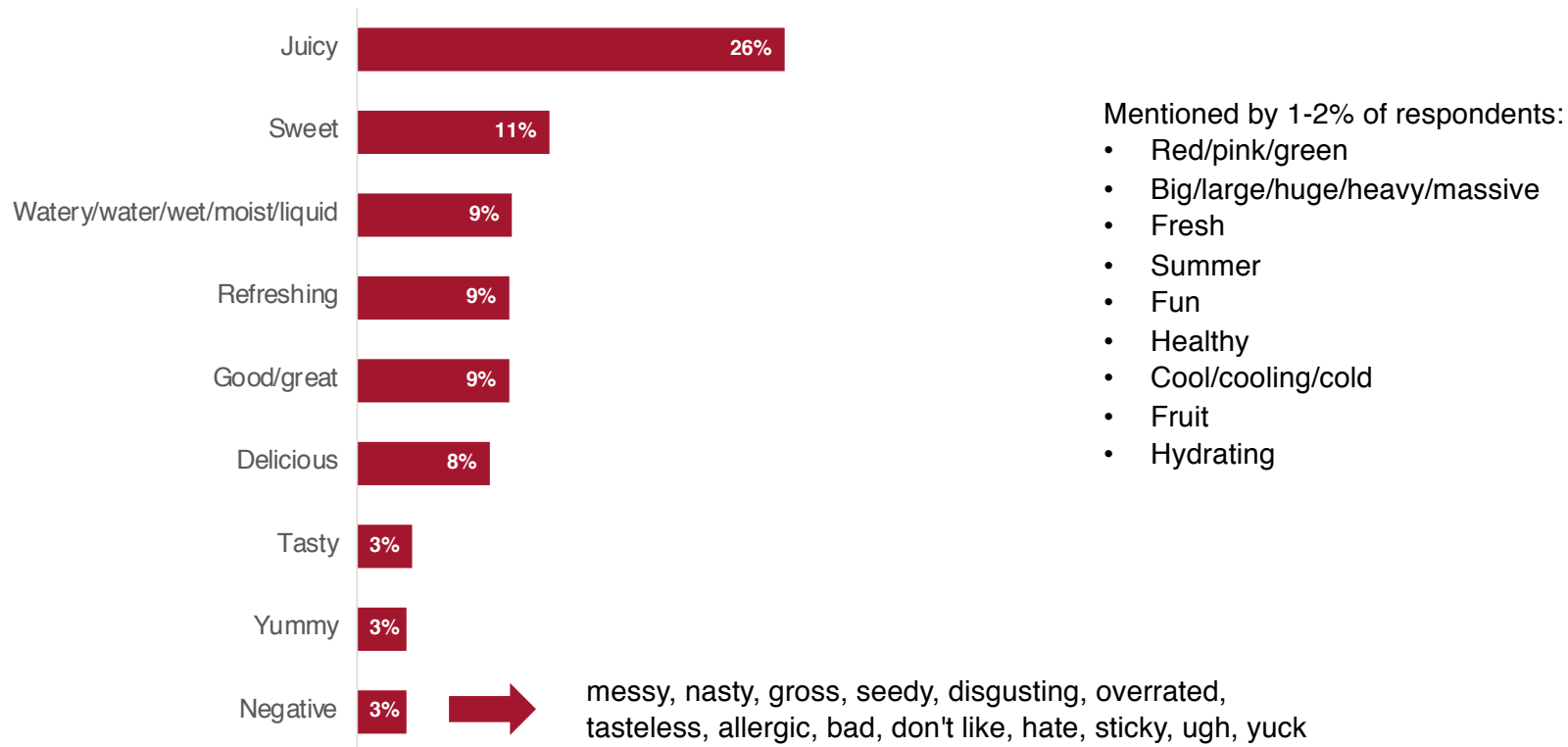
Bolding/red highlighting indicates the location where the fruit is least purchased, bolding/green highlighting indicates the location where the fruit is most purchased.

Source: Total Respondents (n=1124)

For each of the following types of fruit, please indicate where you have primarily purchased it in the Spring and Summer?

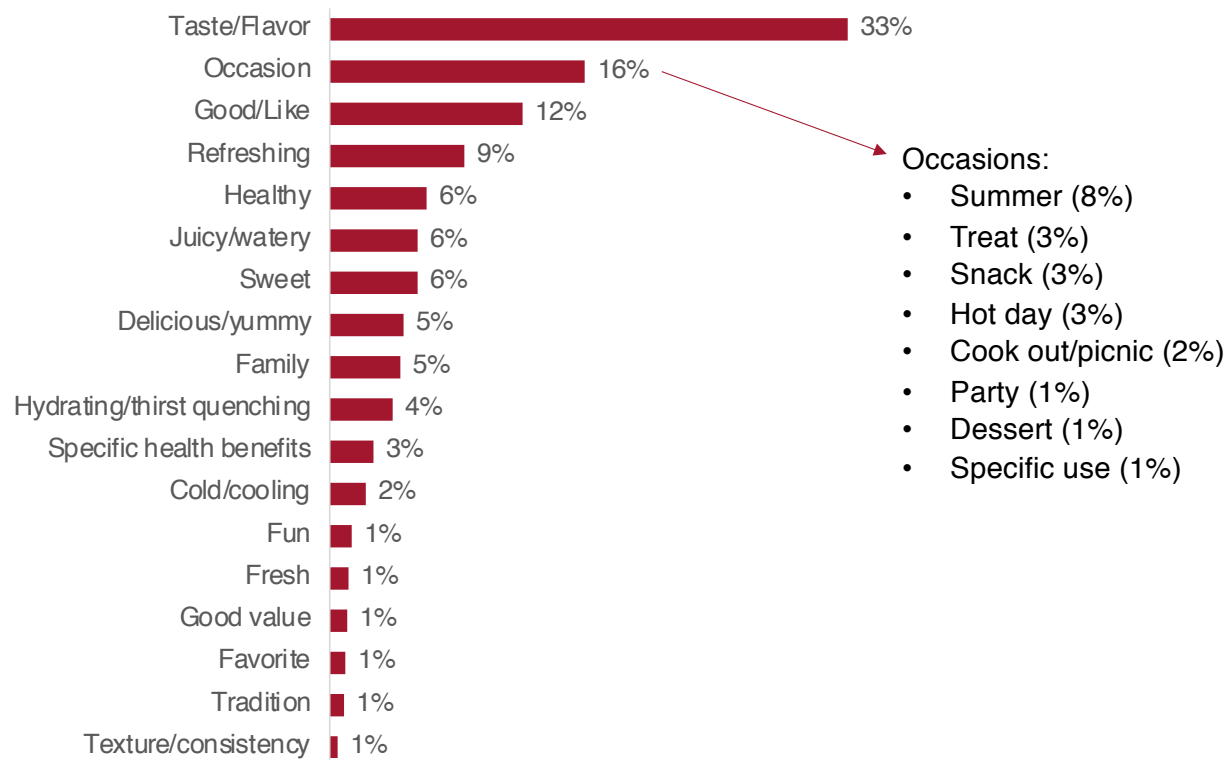


Description Using One Word



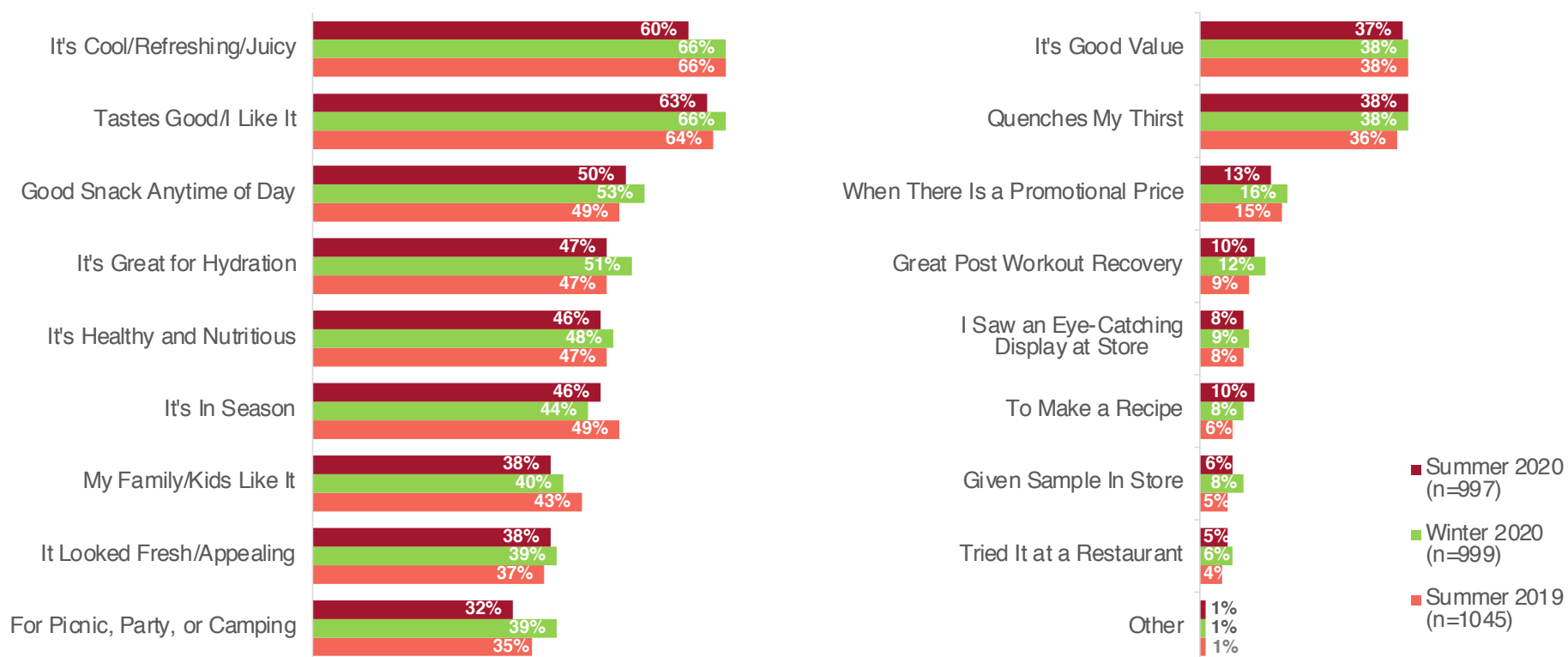
Source: Total Respondents (n=1124)
Describe watermelon using only one word.

Reasons Purchase Watermelon



Source: Total Respondents Purchasing Watermelon (n=997)
What is the main reason you purchase watermelon?

Reasons to Purchase Watermelon



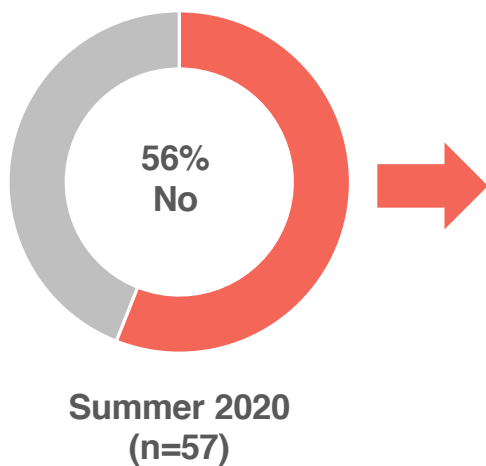
Source: Total Respondents Purchasing Watermelon
What reasons do you purchase watermelon? (select all that apply)

Reasons Not Purchase Watermelon



Source: Total Respondents NOT Purchasing Watermelon
What reasons do you NOT purchase watermelon? (select all that apply)

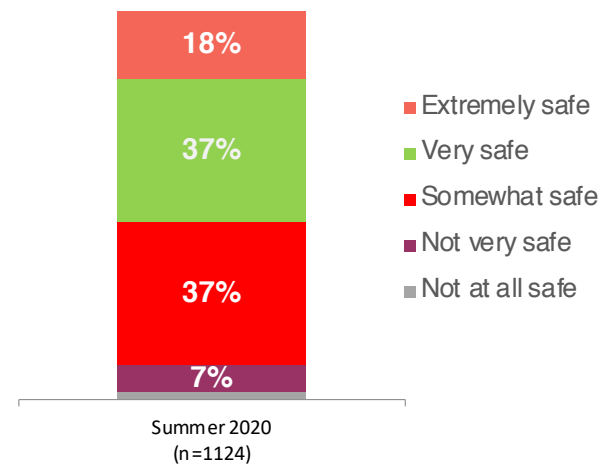
Willing to Buy Fresh Cut Watermelon



Reasons won't buy fresh cut watermelon:

- Cost (9)
- Taste (7)
- Cleanliness/safety (5)
- Dislike watermelon/eat other fruits (5)
- Freshness/Consistency (3)
- Doesn't keep (2)

Safety of Fresh Cut Fruits



Source: Total Respondents NOT Purchasing Watermelon because Messy and/or Too Big/Inconvenient

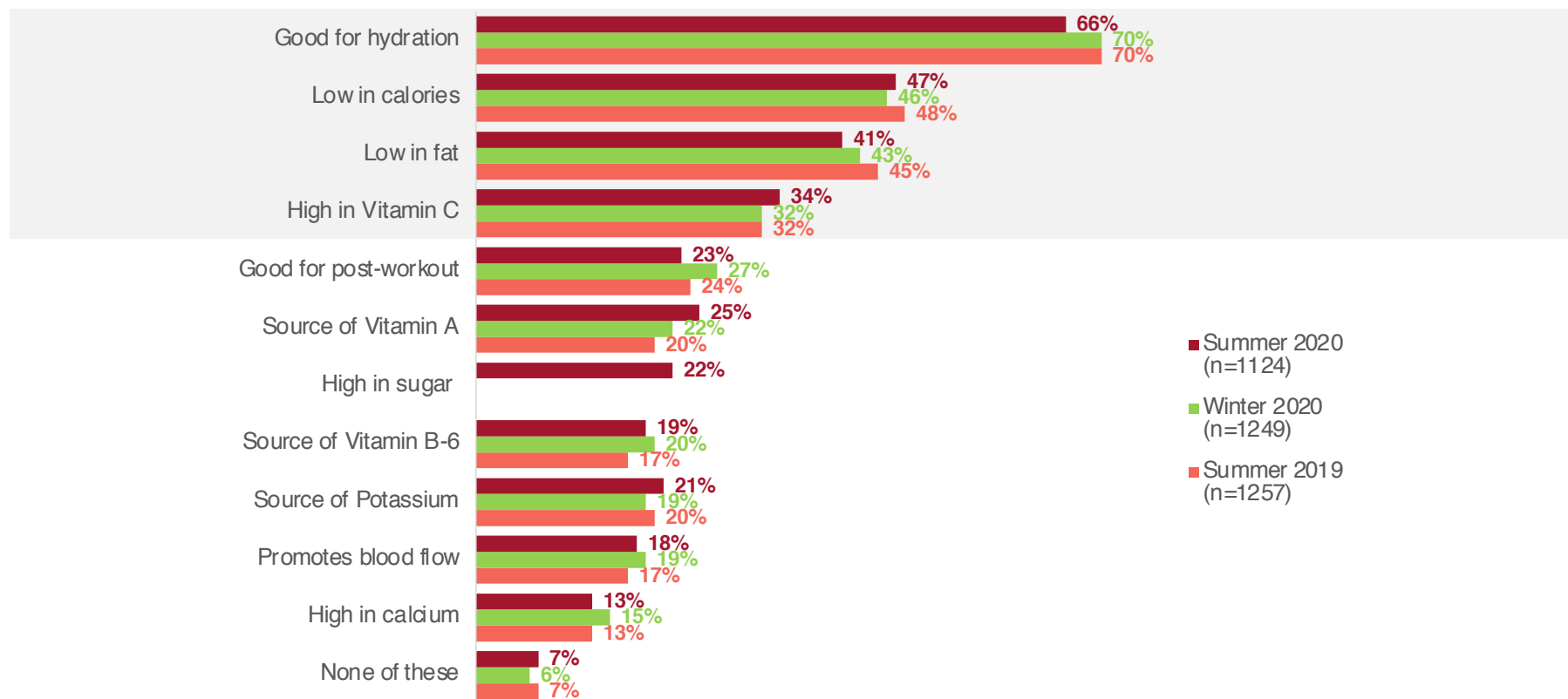
You mentioned you don't buy watermelon because it is messy and/or too big/inconvenient. Would you be willing to spend a bit more for fresh cut, ready to serve watermelon?

Why won't you buy fresh cut, ready to serve watermelon?

Source: Total Respondents

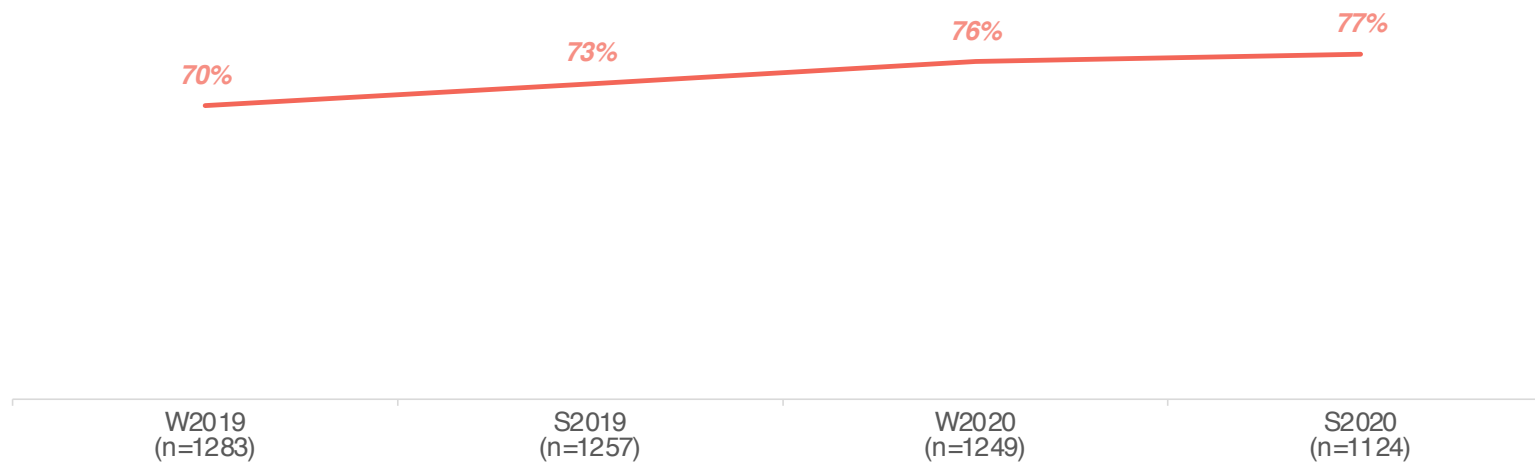
How safe do you feel fresh cut, ready-to-eat fruit is?

Respondents Understanding of the Health Benefits of Watermelon



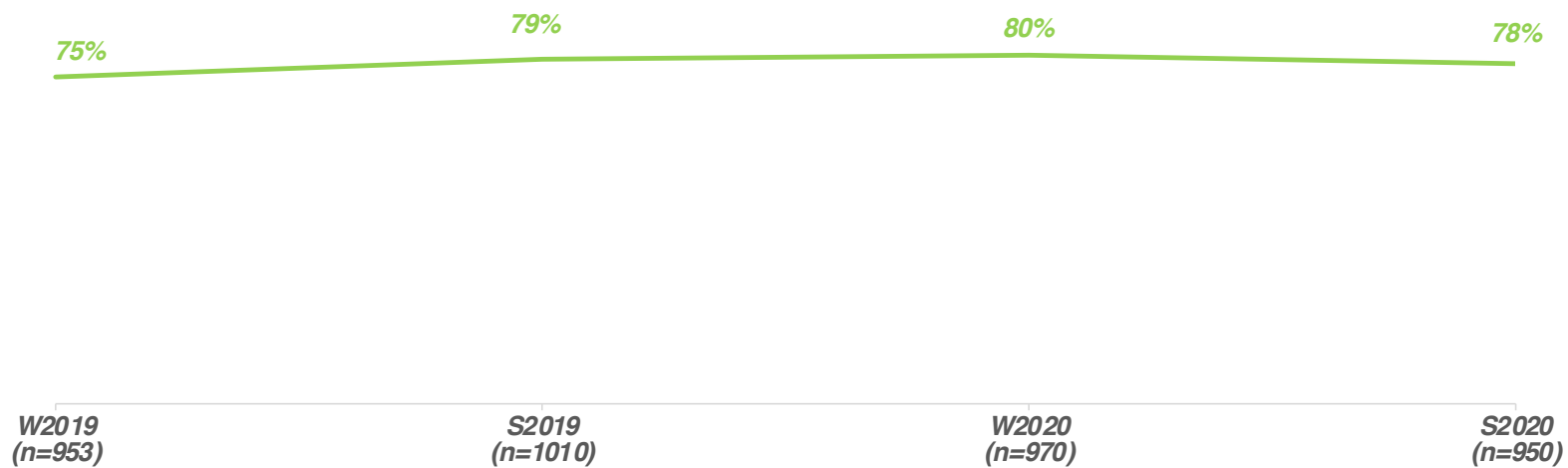
Source: Total Respondents
Which of the following statements do you know to be true about watermelon?

Knowing that Watermelon is Good for Hydration Leads to Purchasing More



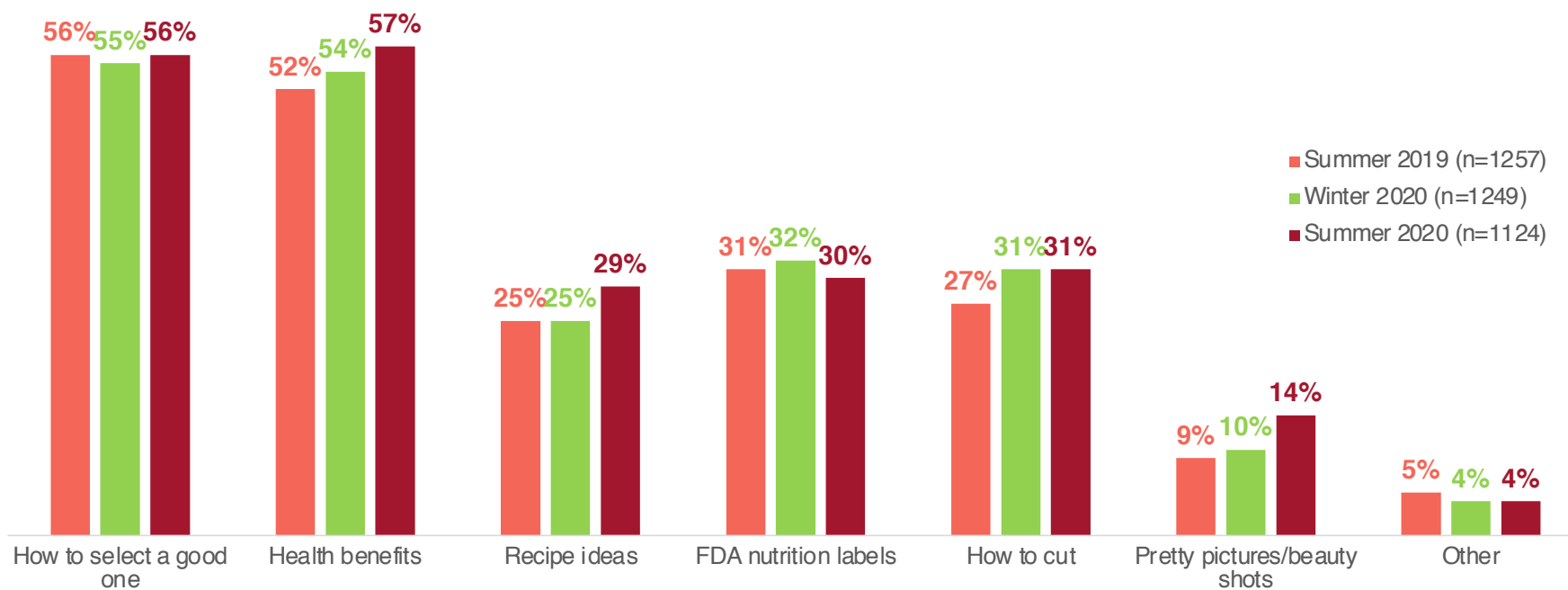
Source: Total Respondents
Would knowing that watermelon is good for hydration make you want to purchase (or purchase more) of it in the future?

Percent Saying Yes to Knowing How to Pick a Good Watermelon



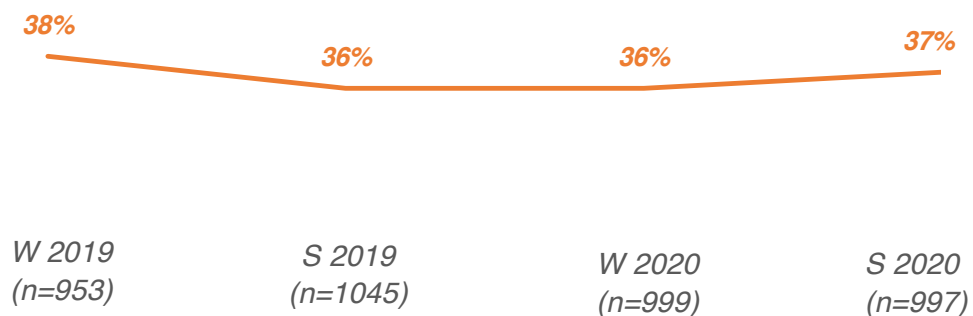
Source: Total Respondents Purchasing Whole/Mini Watermelon
Do you know how to pick out a good watermelon?

Type of Information Respondents Would Like to See at Retail

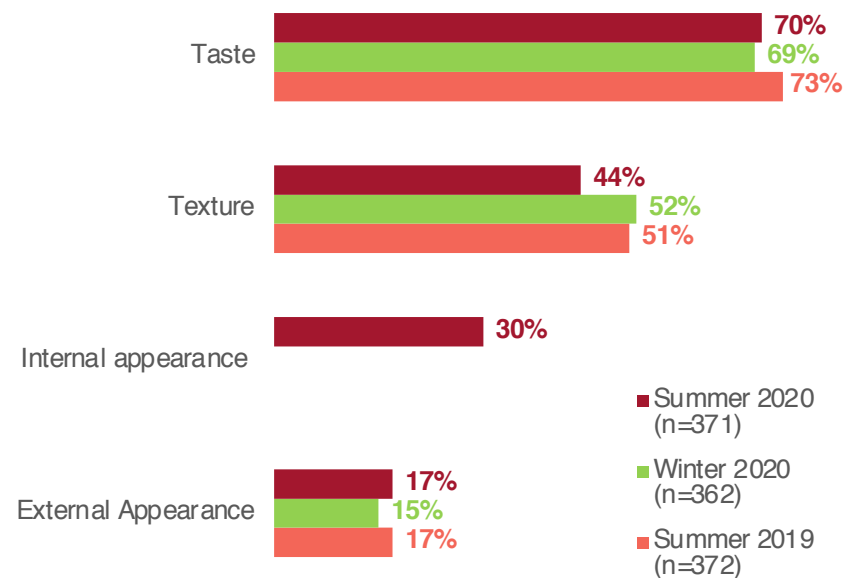


Source: Total Respondents
What type of information would you like to see displayed with watermelon at the retail store?

Percent Indicating Quality Issues with Watermelon Purchase



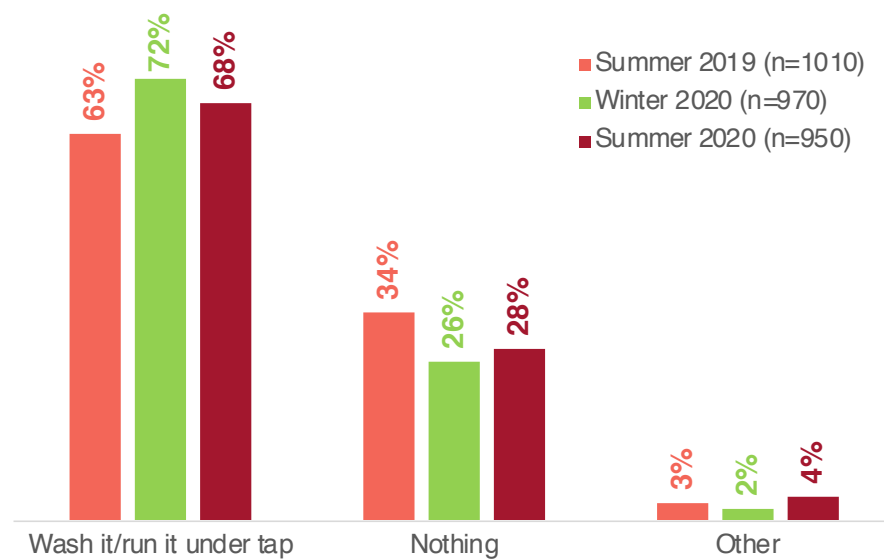
Issues with Watermelon Quality



Source: Total Respondents Purchasing Watermelon
 Have you ever had a problem with the quality of the watermelon you purchased?
 Source: Total Respondents Reporting a Quality Issue
 Which of the following describes the watermelon quality issue?

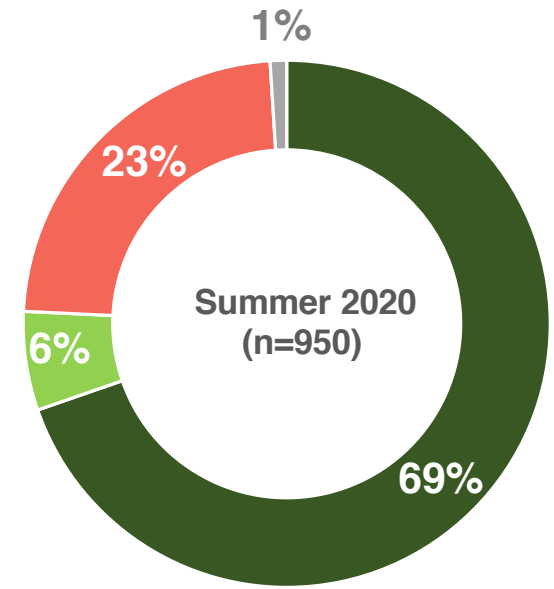
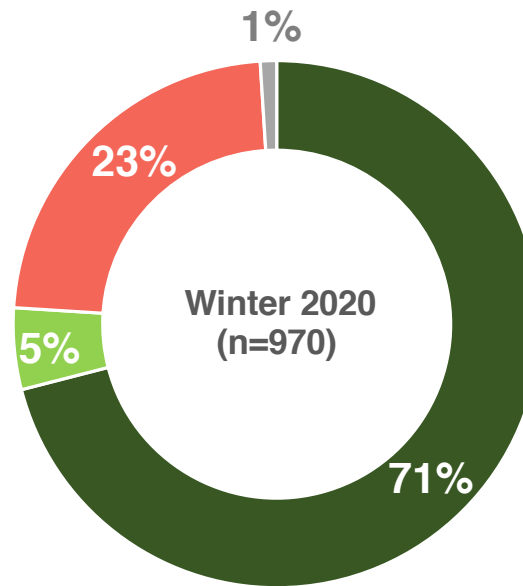
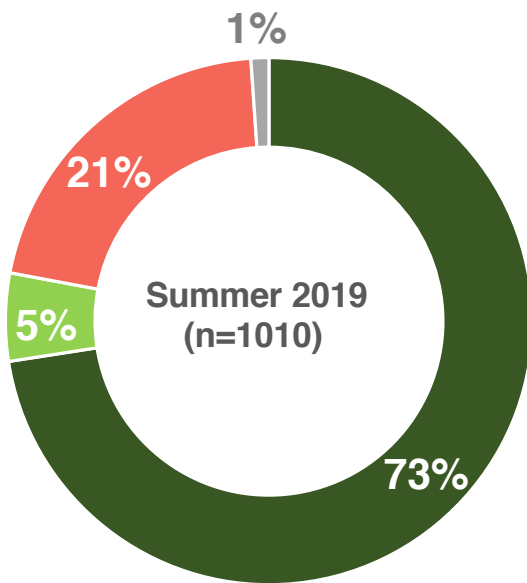






How Watermelon is Being Handled Before Consumption



Source: Total Respondents Purchasing Whole/Mini Watermelon
What do you do with your whole watermelon before you consume it?

Storage of Whole Watermelon



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

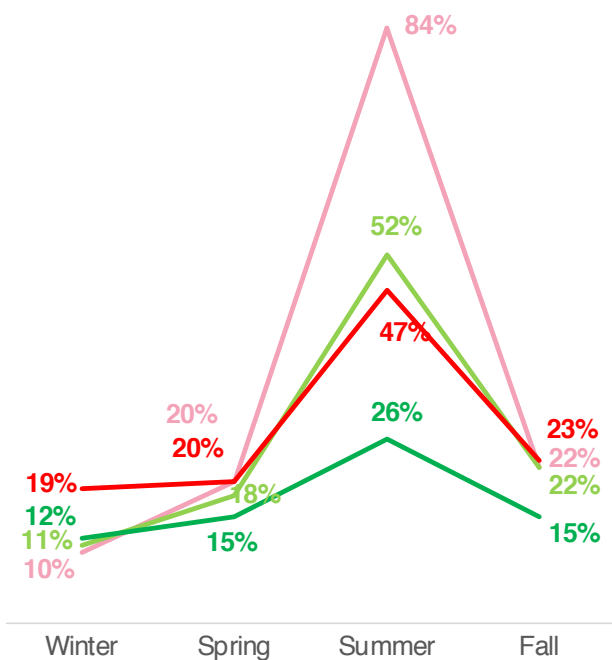
Source: Total Respondents Purchasing Whole/Mini Watermelon
How do you store your whole watermelon?

Encourage to Purchase More Watermelon

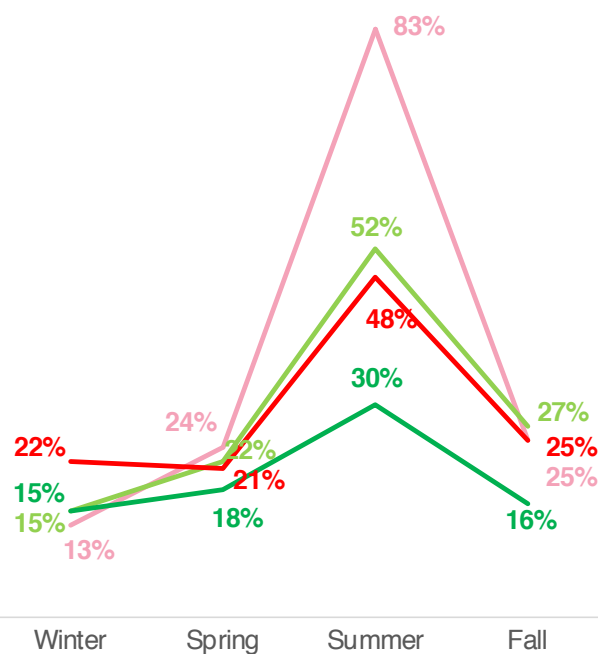


Source: Total Respondents
What might encourage you to purchase (or purchase more) watermelon?

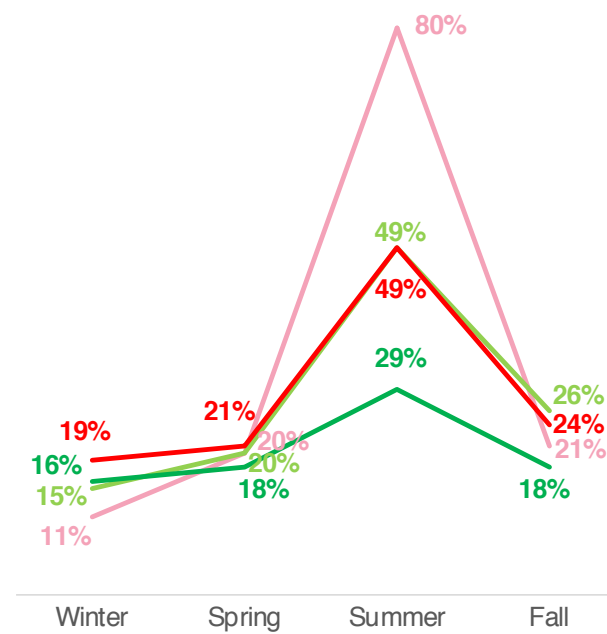
**Seasons Purchased
Summer 2019 (n=1045)**



**Seasons Purchased
Winter 2020 (n=999)**



**Seasons Purchased
Summer 2020 (n=997)**

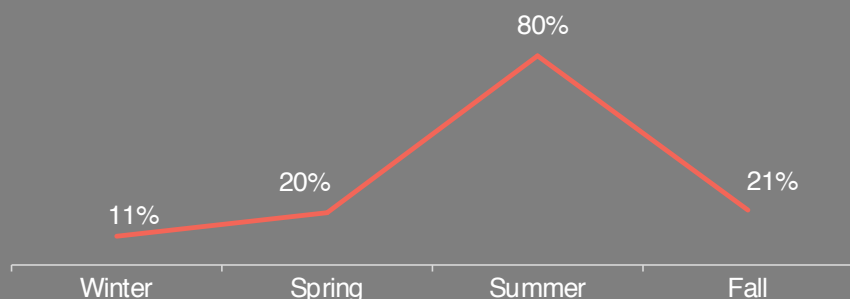


● Juice ● Whole ● Fresh-cut ● Mini

Source: Total Respondents Purchasing Watermelon
Please select the seasons you purchase each type of watermelon (Summer (June-August), Fall (September-November), Winter (December-February), Spring (March-May) or I do not purchase.

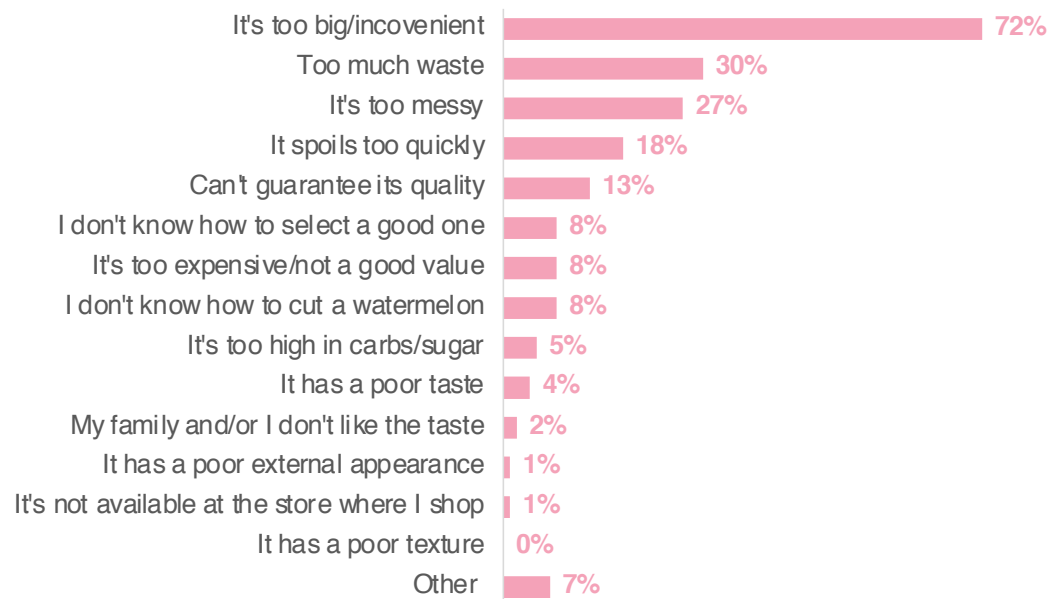
Large Watermelon

Seasons Purchased



Reasons for Not Purchasing

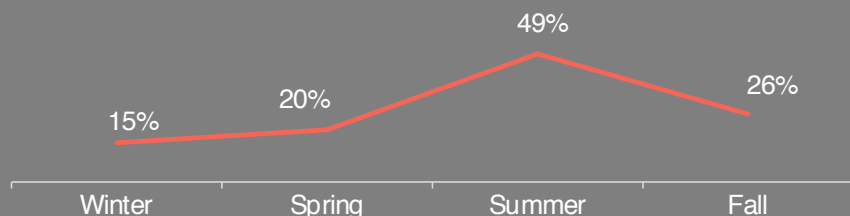
Of the 8% (n=83) That Do Not Purchase Type of Watermelon



Source: Total Respondents Purchasing Watermelon (=997)
Please select the seasons you purchase each type of watermelon.
Why don't you purchase whole, large watermelon? (select all that apply)

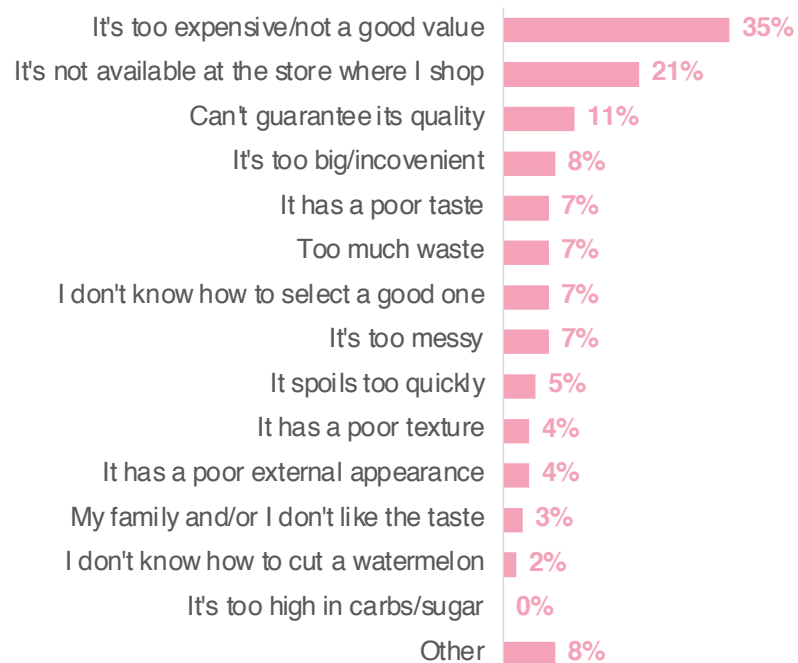
Mini Watermelon

Seasons Purchased



Reasons for Not Purchasing

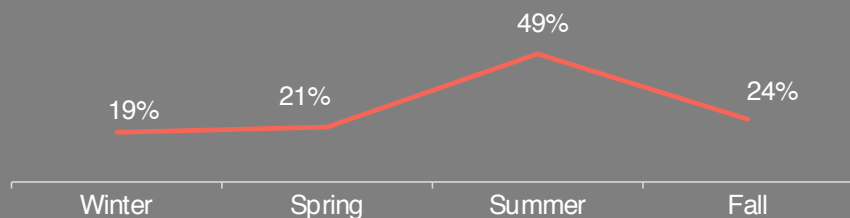
Of the 23% (n=229) That Do Not Purchase Type of Watermelon



Source: Total Respondents Purchasing Watermelon (=997)
 Please select the seasons you purchase each type of watermelon.
 Why don't you purchase whole, mini watermelon? (select all that apply)

Fresh Cut Watermelon

Seasons Purchased



Reasons for Not Purchasing

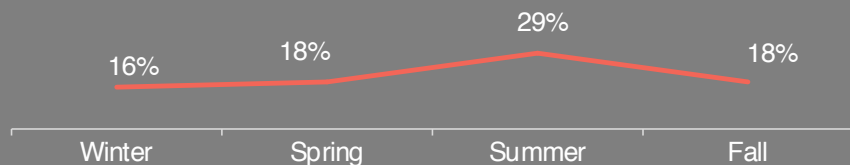
Of the 27% (n=269) That Do Not Purchase Type of Watermelon



Source: Total Respondents Purchasing Watermelon (=997)
Please select the seasons you purchase each type of watermelon.
Why don't you purchase fresh cut watermelon? (select all that apply)

Watermelon Juice

Seasons Purchased



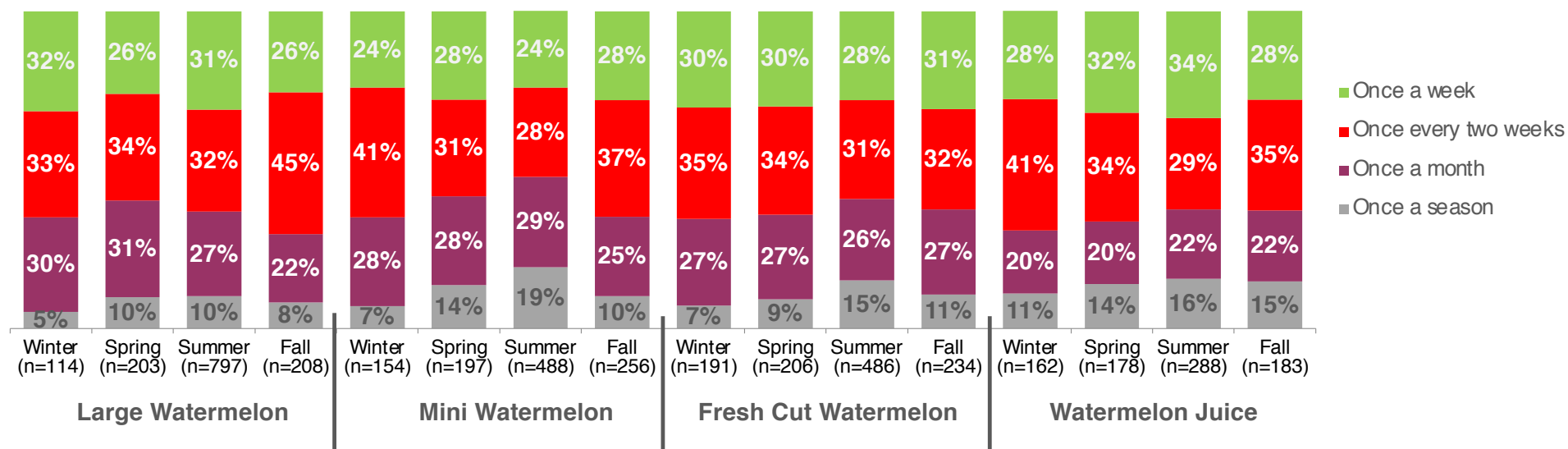
Reasons for Not Purchasing

Of the 50% (n=497) That Do Not Purchase Type of Watermelon



Source: Total Respondents Purchasing Watermelon (=997)
Please select the seasons you purchase each type of watermelon.
Why don't you purchase watermelon juice? (select all that apply)

How Often Purchase Specific Kinds of Watermelon by Season

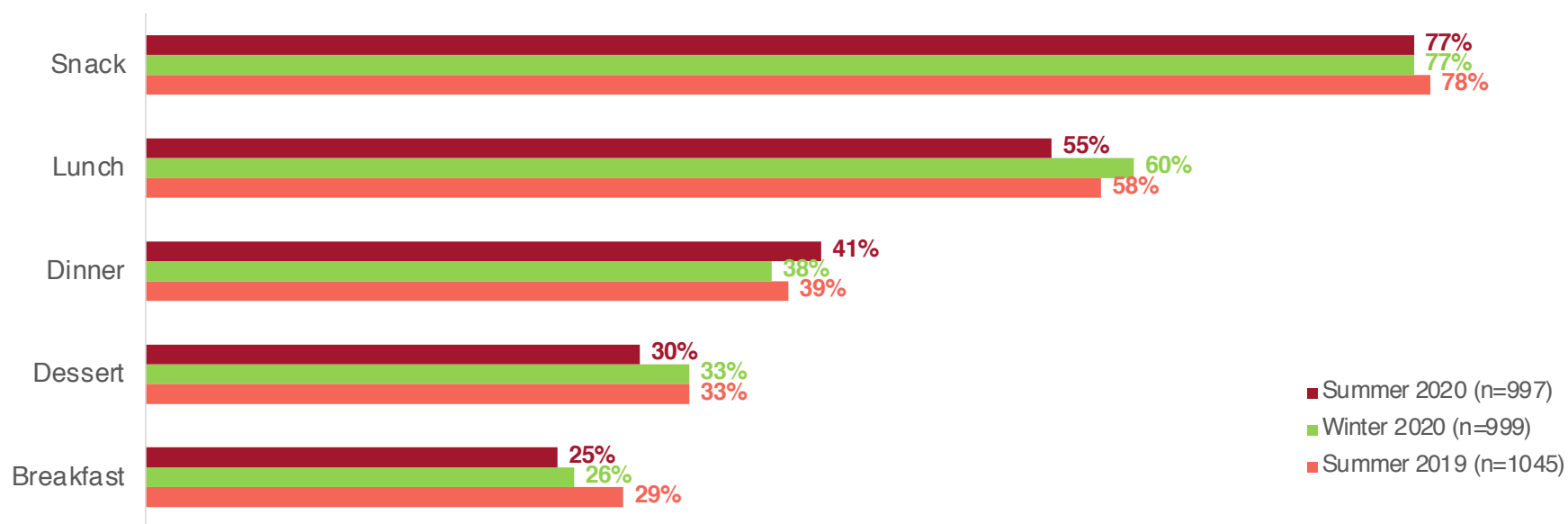


Source: Total Respondents Purchasing Each Type of Watermelon During a Particular Season
 How often do you purchase _____ watermelon during each of the following seasons? (Once a week, once every two weeks, once a month, once a season)

A top-down view of a white ceramic bowl filled with a fresh watermelon salad. The salad consists of large, irregular chunks of bright red watermelon, several large, vibrant green basil leaves, and small cubes of white feta cheese. Interspersed among the other ingredients are a few dark, pitted olives and thin slices of red onion. A dark, glossy dressing is drizzled over the salad. 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.

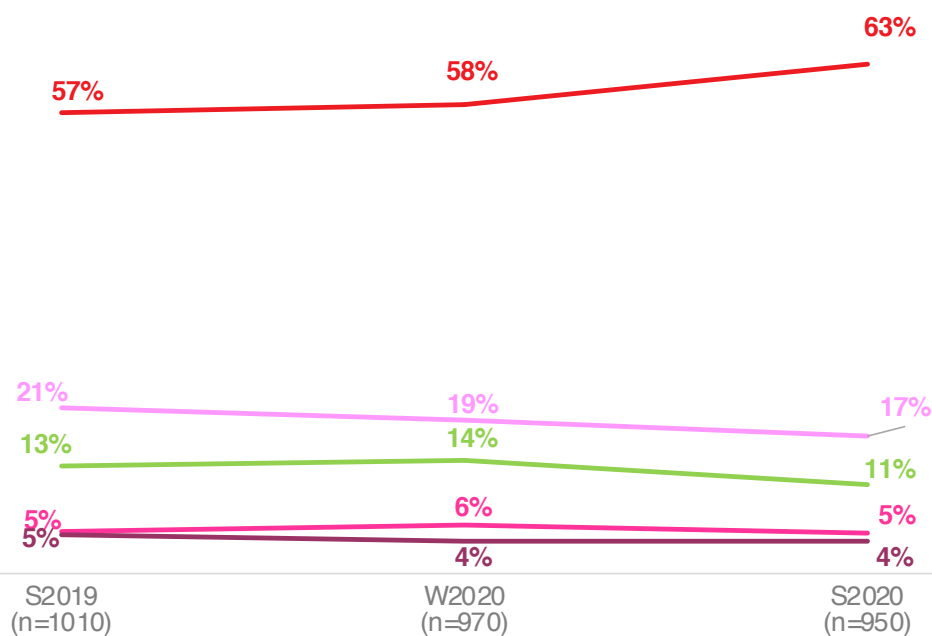
WATERMELON CONSUMPTION

Time of Day Watermelon is Eaten

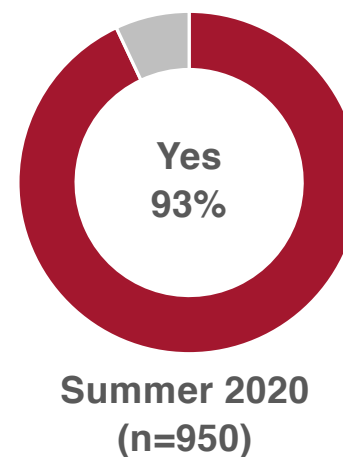


Source: Total Respondents Purchasing Watermelon
When during the day do you eat watermelon? (select all that apply)

Percentage of Watermelon Going to Waste



Know How to Cut a Whole Watermelon



- None, we use it all
- Just the rind
- Use 25%
- Use 50%
- 75% or more

Source: Total Respondents Purchasing Whole/Mini Watermelon
 When purchasing a whole watermelon, how much, if any goes to waste?
 Do you know how to cut a whole watermelon?

Consumption by Percentage of Time

Summer 2019
(n=1045)

90%
Plain watermelon

10%
In a recipe

Winter 2020
(n=999)

90%
Plain watermelon

10%
In a recipe

Summer 2020
(n=997)

86%
Plain watermelon

14%
In a recipe

Location of Consumption by Percentage of Time

Summer 2019
(n=1045)

79%
In my home

15%
Outside my home

5%
Restaurant or other food
service location

Winter 2020
(n=999)

79%
In my home

15%
Outside my home

6%
Restaurant or other food
service location

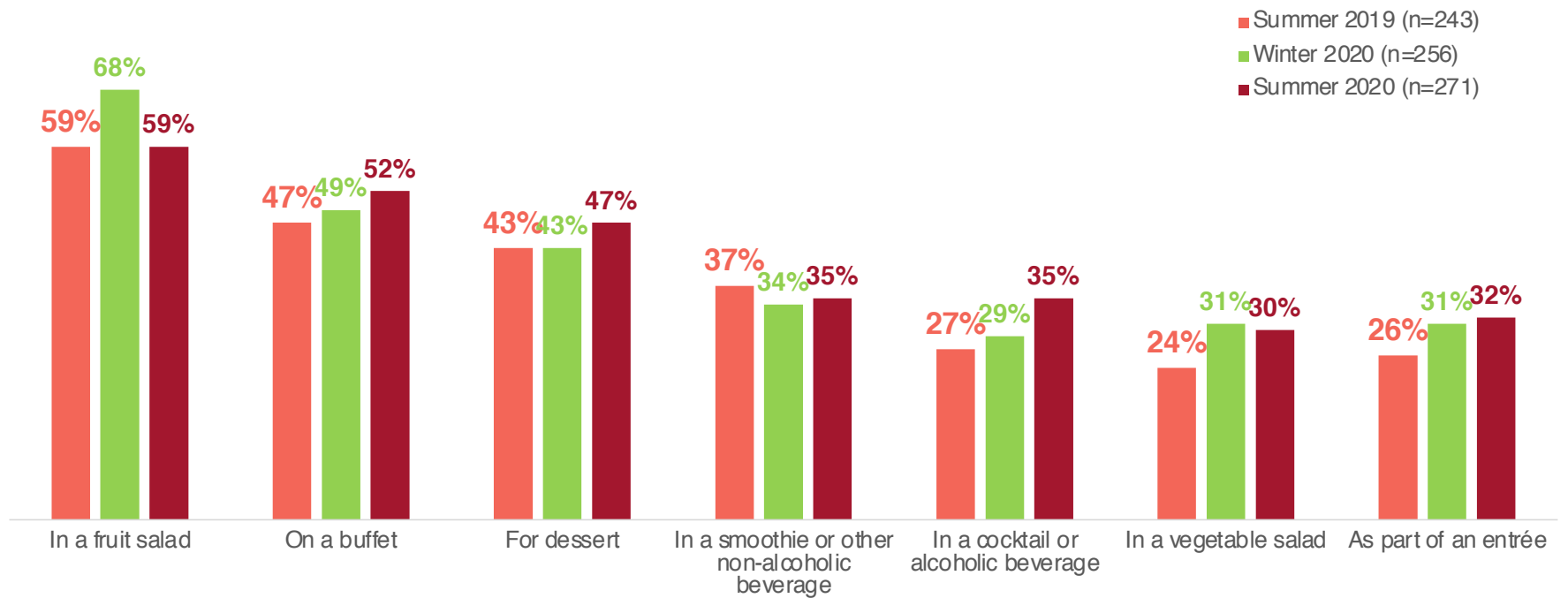
Summer 2020
(n=997)

77%
In my home

15%
Outside my home

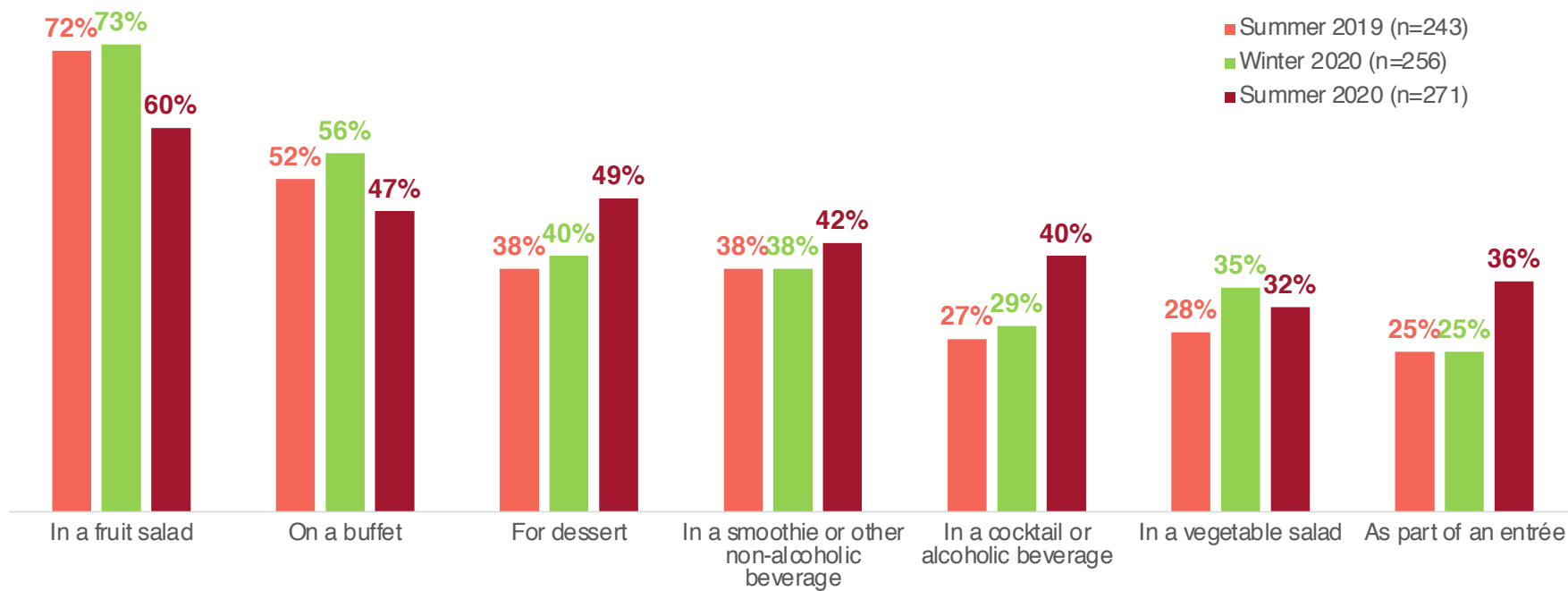
8%
Restaurant or other food
service location

Ways Watermelon is Consumed in a Restaurant



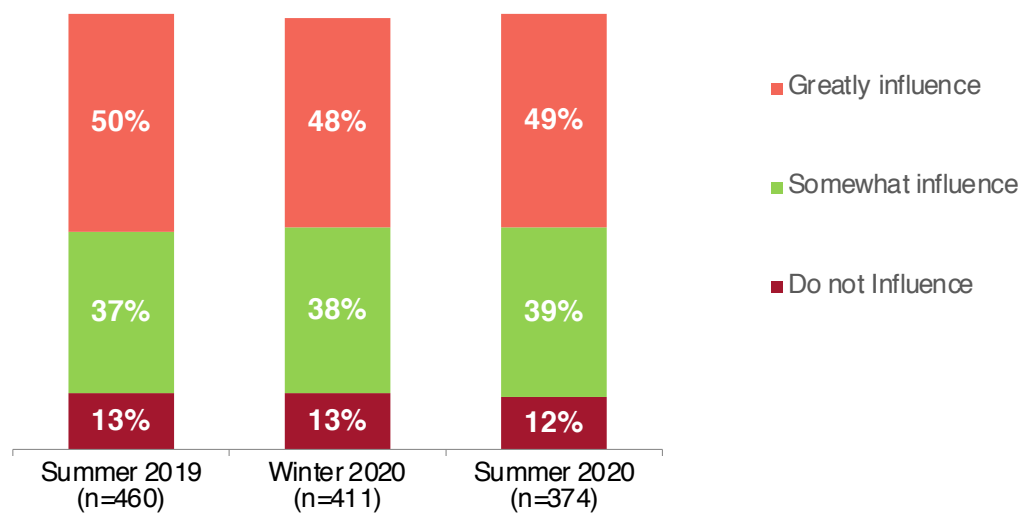
Source: Total Respondents Consuming Watermelon in a Restaurant
Typically in what way(s) do you consume watermelon at a restaurant? (select all that apply)

Ways Watermelon is Considered in a Restaurant



Source: Total Respondents Consuming Watermelon in a Restaurant
Which ways would you consider ordering watermelon at a restaurant? (select all that apply)

Influence Children Have on Watermelon Purchases



Source: Total Respondents with Children
How much do your children influence your watermelon purchases?

Key Findings

- Taste and watermelon's refreshing quality are the main reasons watermelon is purchased.
 - Watermelon is on par with other non-melon fruits in terms of taste and freshness while outperforming other melons (cantaloupes and honeydews).
- Bananas, oranges, apples, and blueberries are viewed as better values and healthier than watermelon.
 - Lower value ratings may be driven by the perceived waste with watermelon. Perhaps providing more advice on cutting to maximize usage will reduce perceived waste.
 - Being good for hydration is the key health benefit of watermelon. There is an opportunity to expand knowledge of other health benefits. In fact, consumers would like to see health benefits displayed at the point of sale.
- Key barriers of watermelon purchase include being too big/inconvenient and messy.
 - Fresh cut watermelon is one potential way to overcome these barriers. However, consumers also perceive fresh cut as costing more, not tasting as good, not being safe, and not being truly fresh.

Key Findings

- Although many claim they know how to pick a watermelon, other data suggests a need and desire for assistance.
 - A third have experienced a quality issue and just over half want information on picking at the point of sale.
 - There may also be an opportunity to provide guidance to pick-up and delivery shoppers on how to pick a good watermelon.
- COVID-19 is likely impacting a few measures versus Summer 2019
 - More washing of watermelon before consumption.
 - More pick-up/delivery grocery shopping.
 - Differences in how might consider consuming watermelon in restaurants.

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