



NATIONAL WATERMELON PROMOTION BOARD

Winter Consumer Research Findings

April 2021



PURPOSE

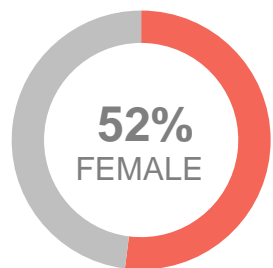
To design and implement a consumer tracking survey to enable the National Watermelon Promotion Board to grow demand

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 1182 Completes

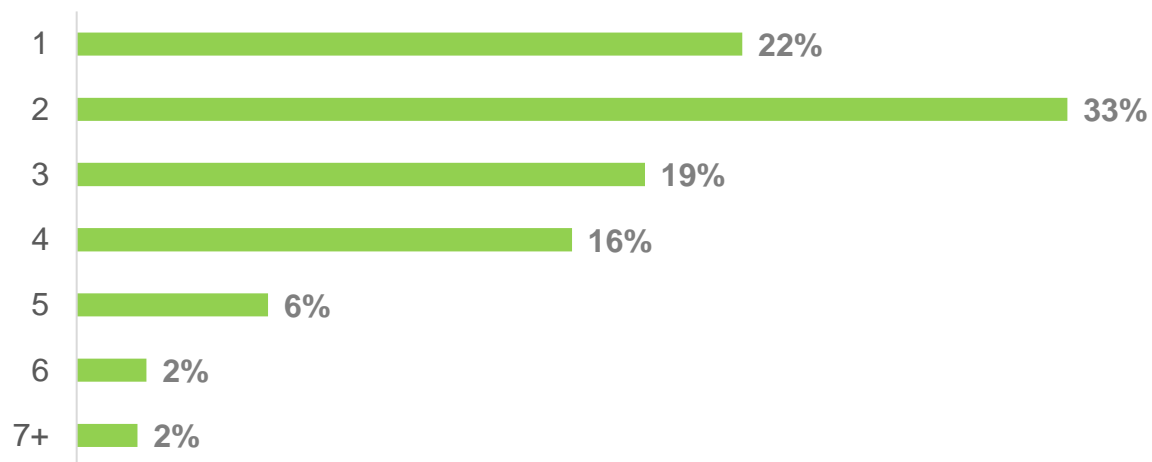


Gender

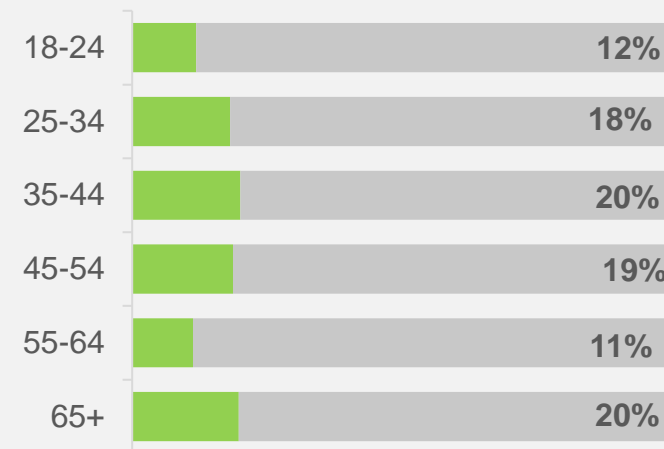


The primary food shopper

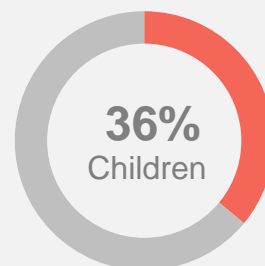
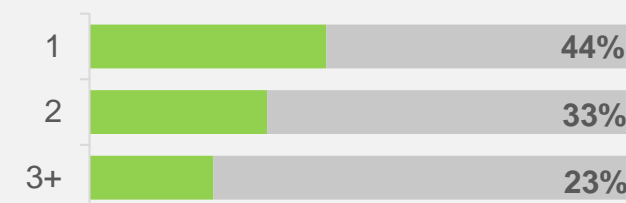
Number of People Living in Household



Age

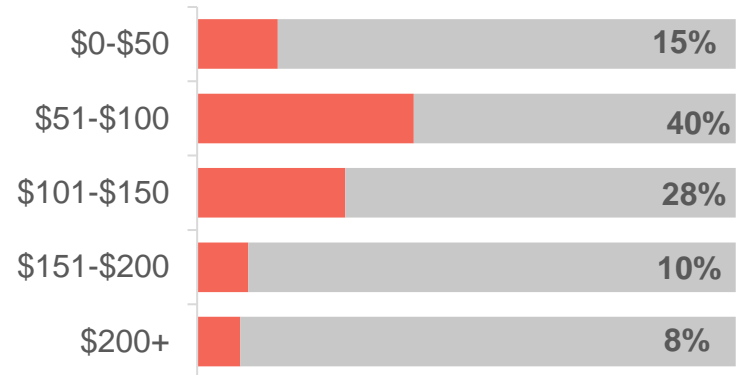


Number of Children
(among those with children)

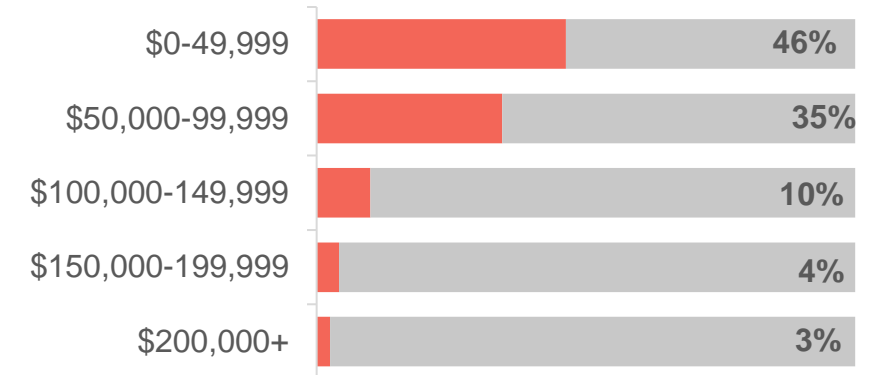


Demographics of Respondents (n=1182)

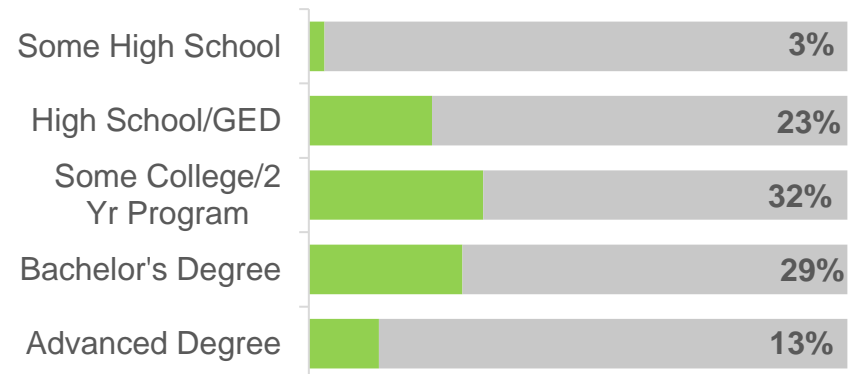
Weekly Grocery Spend



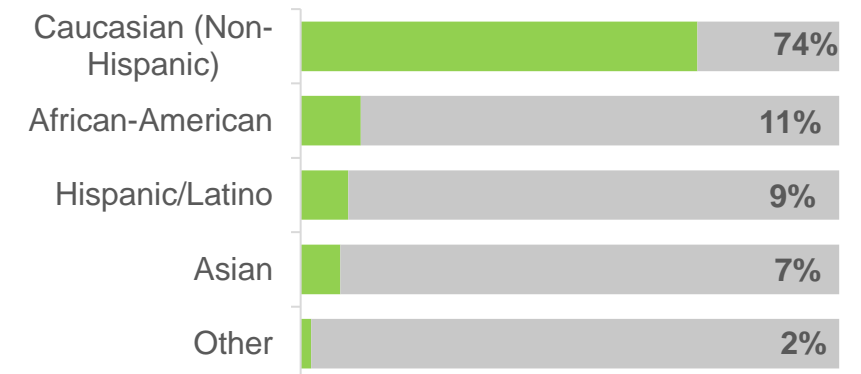
Household Income



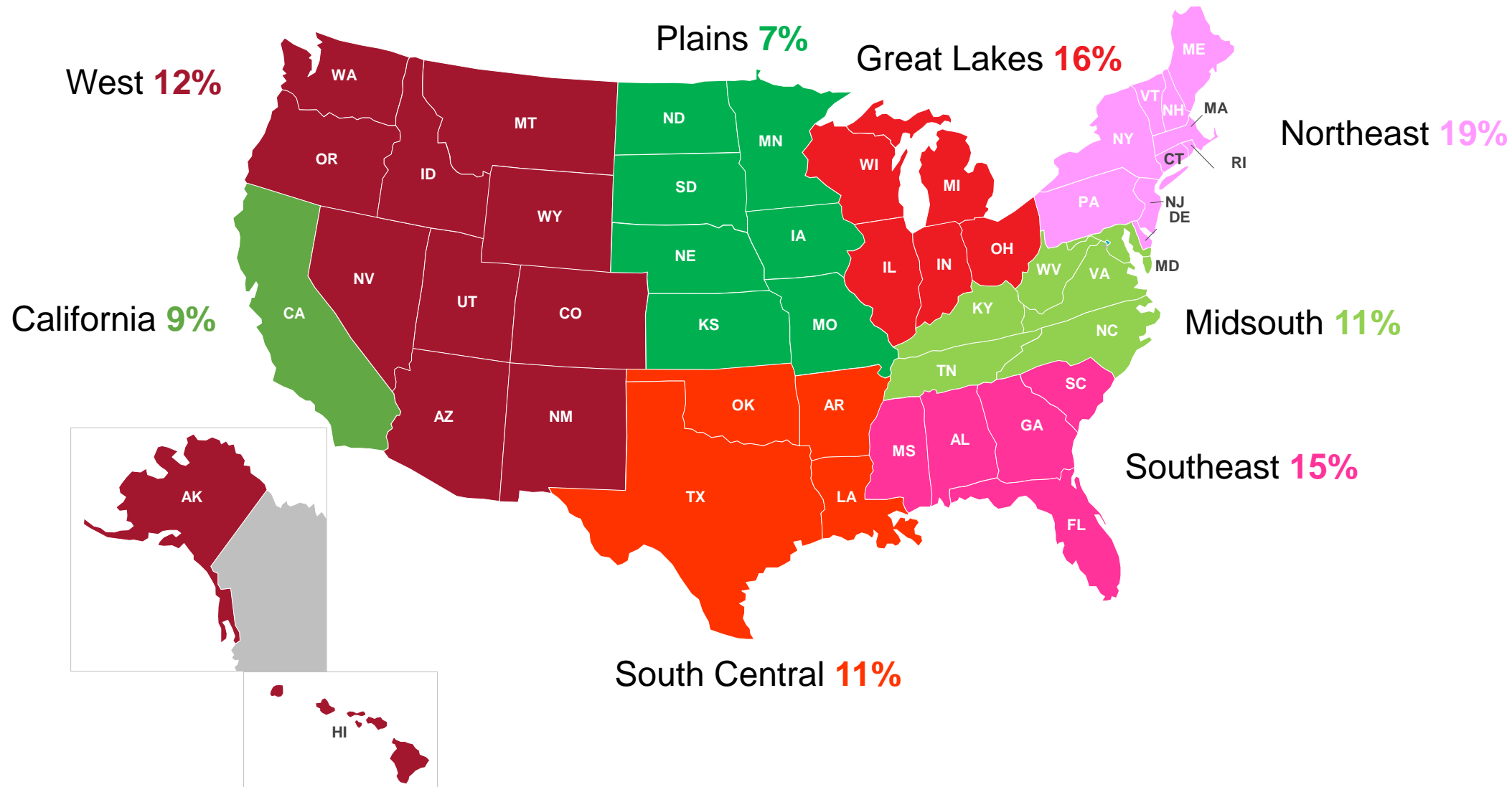
Education Level

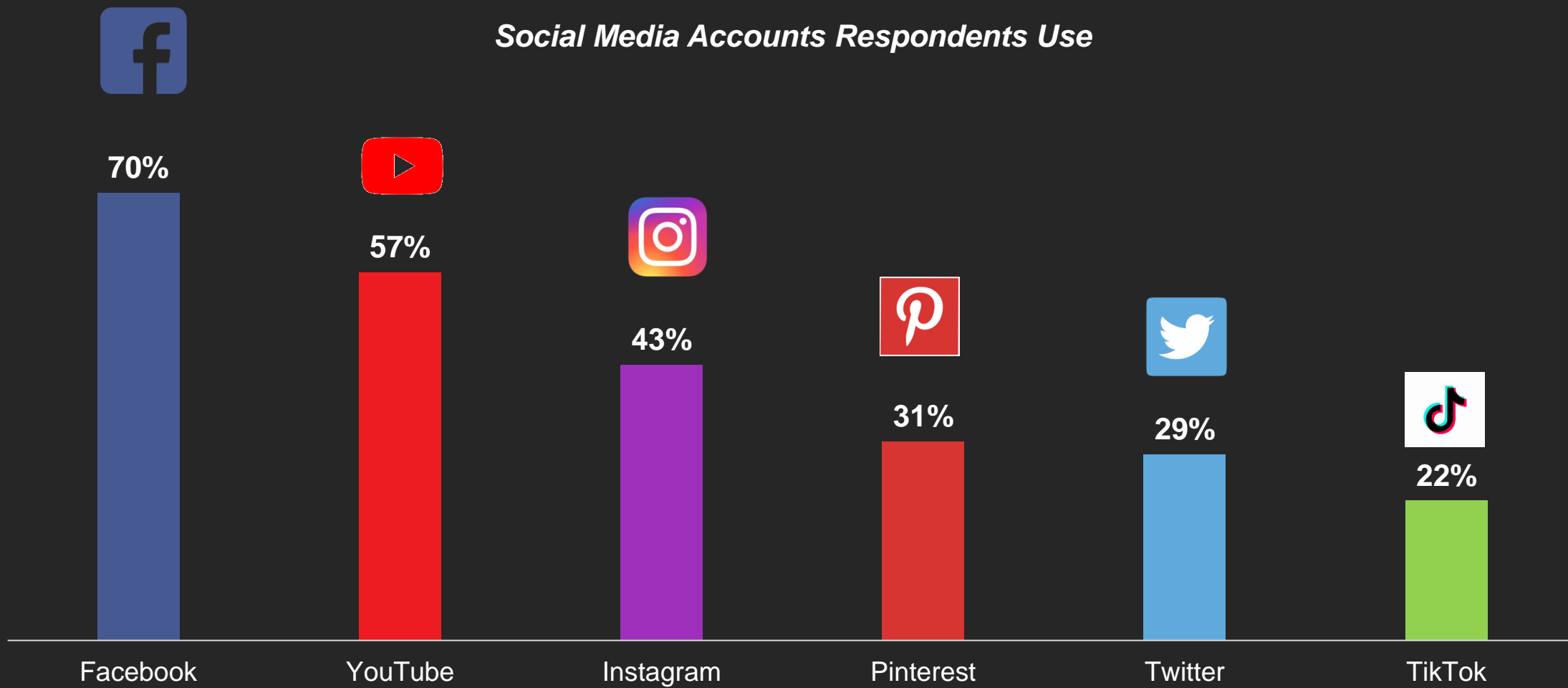


Race/Ethnicity



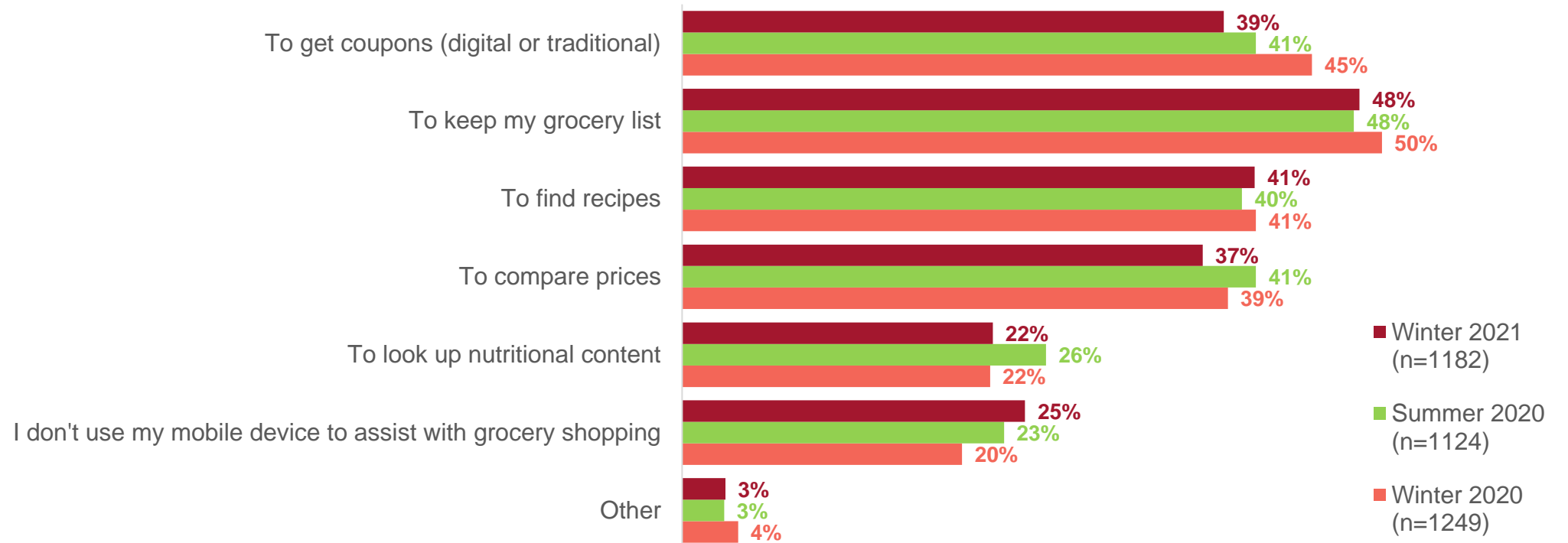
Demographics of Respondents (n=1182)







Ways Used Mobile Device to Assist With Your Grocery Shopping

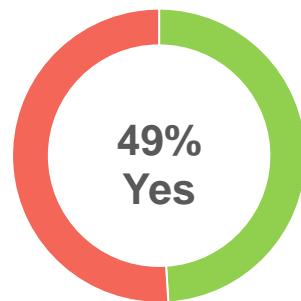


Source: Total Respondents

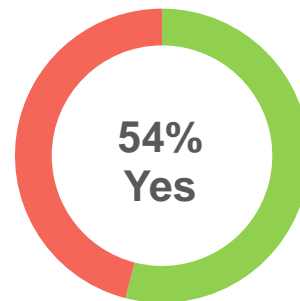
Please indicate below how you have used your mobile device to assist you with your grocery shopping? (Select all that apply)



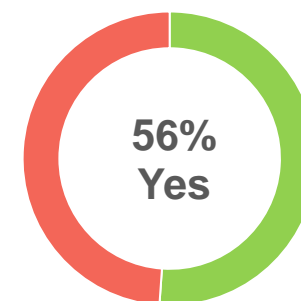
Ever Used Grocery Pick-up, Delivery, or Meal Kit Delivery



Winter 2020
(n=1249)



Summer 2020
(n=1124)



Winter 2021
(n=1182)

Usage decreases
with age:

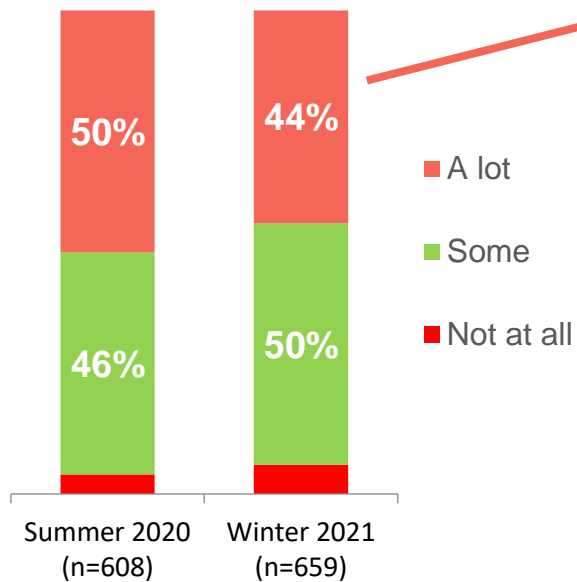
- 18-24 (72%)
- 25-34 (73%)
- 35-44 (58%)
- 45-54 (53%)
- 55-64 (48%)
- 65+ (35%)

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

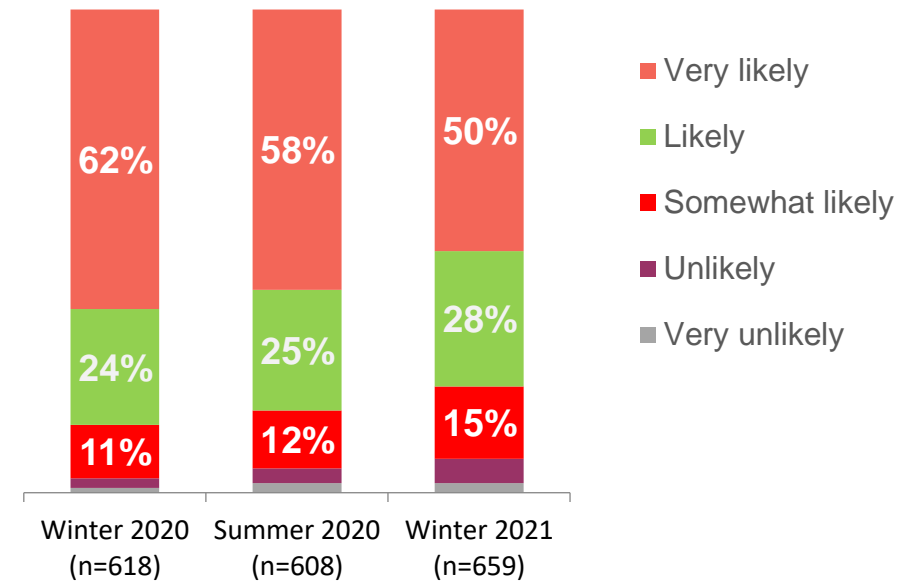


Those age 18-44 are more likely to say they trust a lot compared to those age 45+ (49% vs. 37%)

Services used in past 12 months

- Delivery from retail location (55%)
- Curbside pick-up (54%)
- Third party delivery (42%)
- Other (3%)

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)

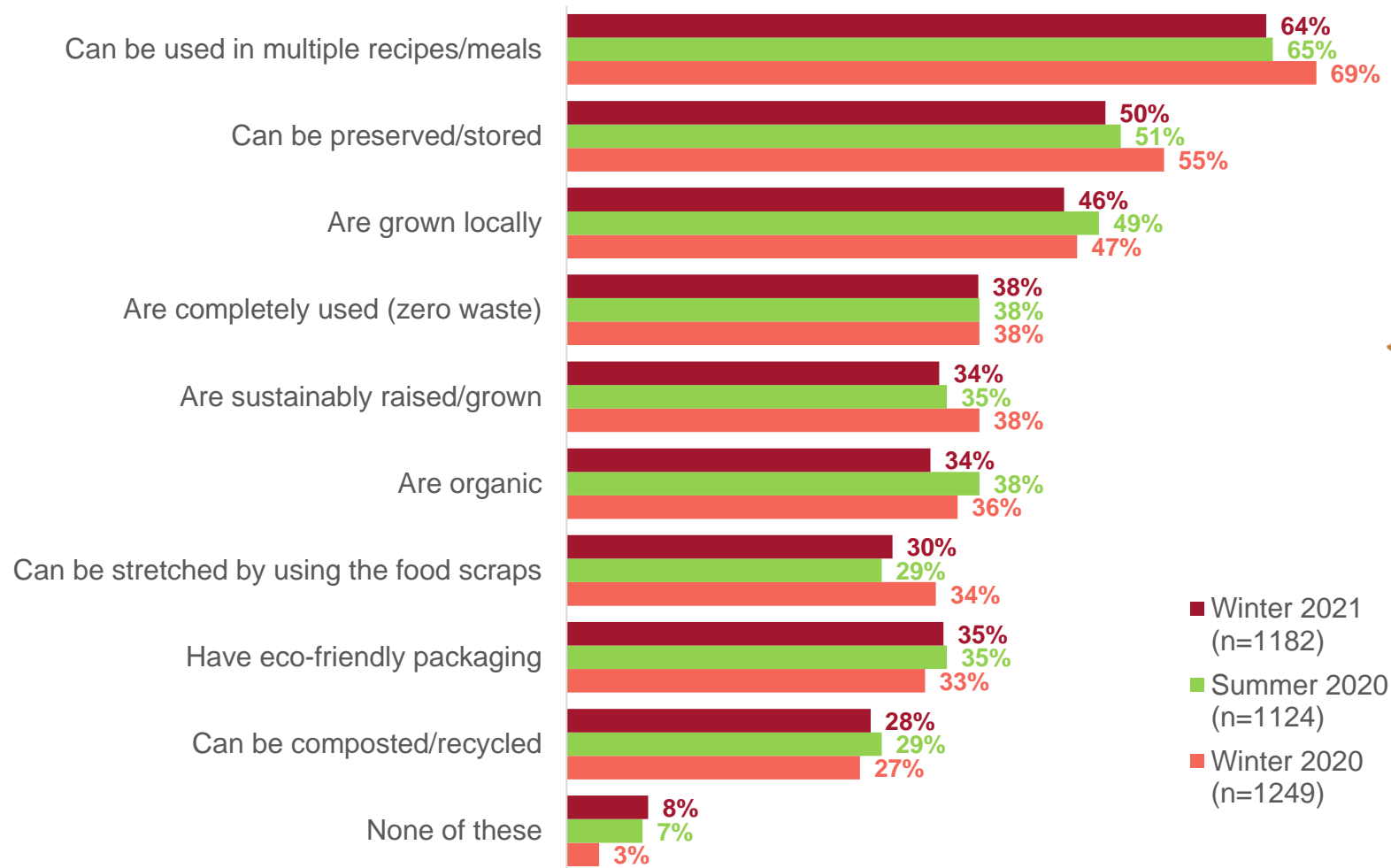
How much do you trust the person who is selecting your produce for your grocery pick-up/delivery order to select quality produce?

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 ...



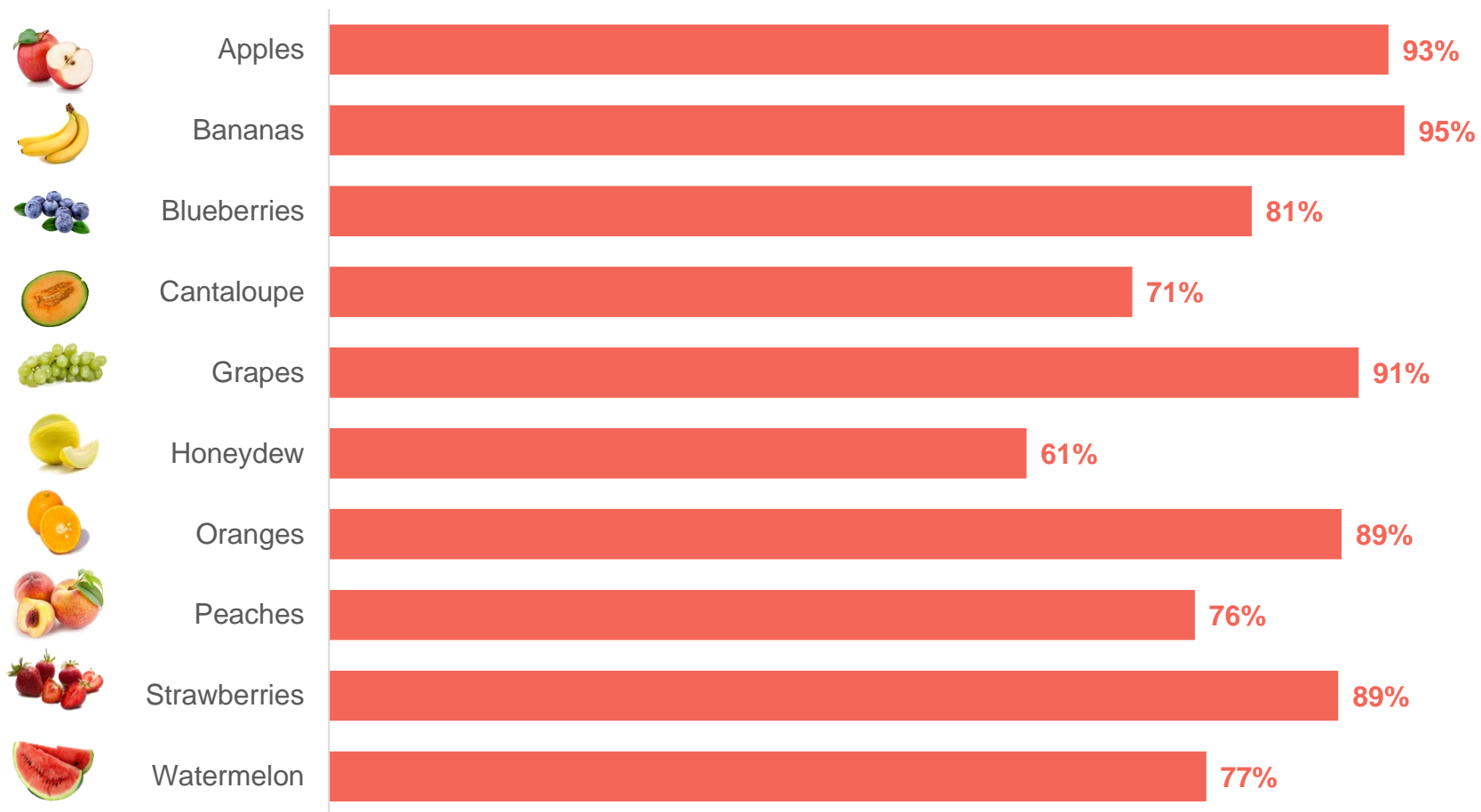
■ Winter 2021
(n=1182)

■ Summer 2020
(n=1124)

■ Winter 2020
(n=1249)



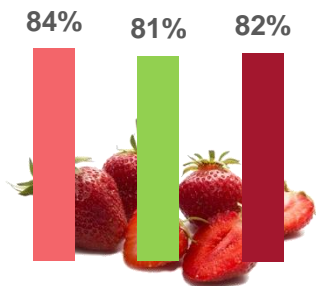
Fruits purchased in Fall/Winter 2021



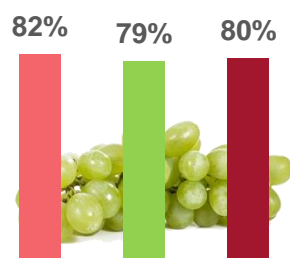
Source: Total Respondents (n=1182)

For each of the following types of fruit, please indicate where you have primarily purchased it in the Fall and Winter.

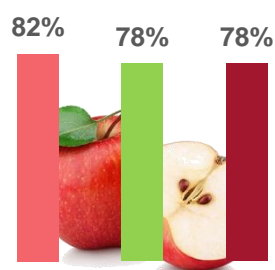
Percent Of People That Like The Taste Of ...



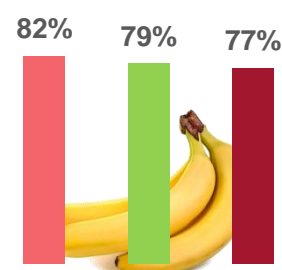
Strawberries



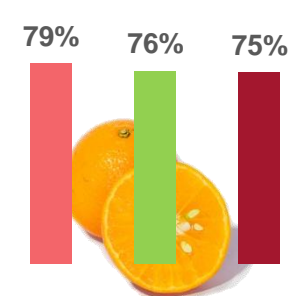
Grapes



Apples



Bananas

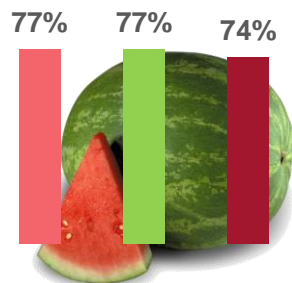


Oranges

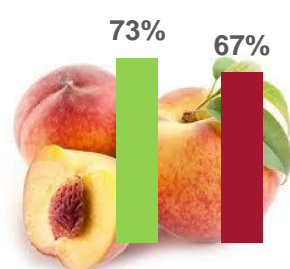
● Winter 2020 (n=1249)

● Summer 2020 (n=1124)

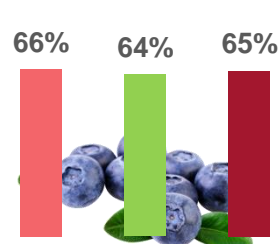
● Winter 2021 (n=1182)



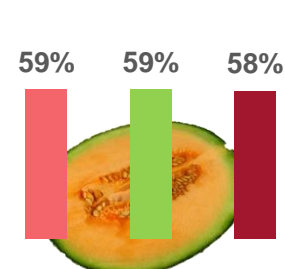
Watermelon



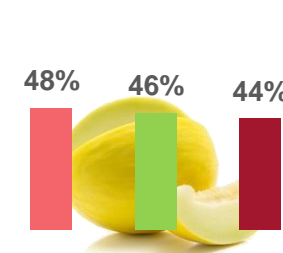
Peaches



Blueberries



Cantaloupes



Honeydews

Freshness Rankings - Winter 2021

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

Source: Total Respondents (n=1182)
Please rank the following fruits by how long each will stay fresh before you consume them (1) freshest to least fresh (10).



#1 APPLE



#2 ORANGES



#3 WATERMELON

Average Safety Score

Winter 2020



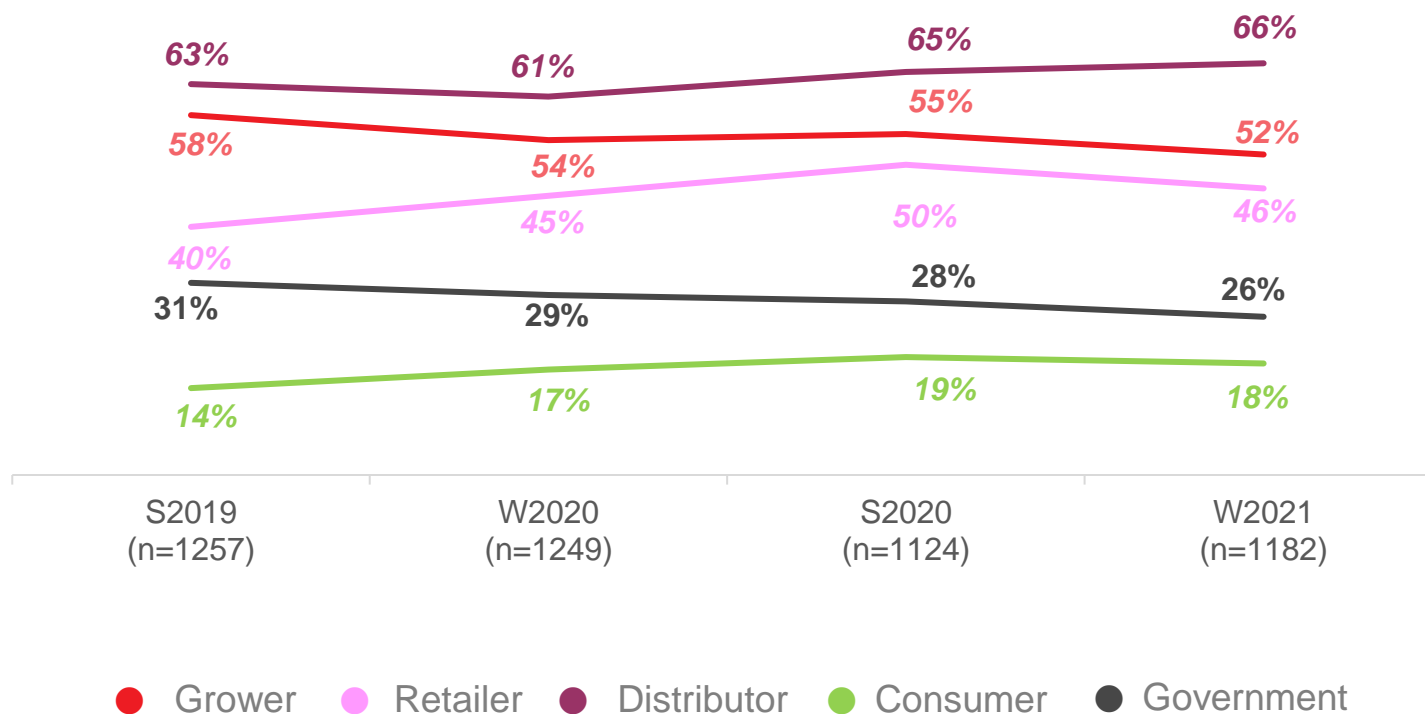
Summer 2020



Winter 2021



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	96%	8.1	8.2
Apples	94%	8.0	8.4
Oranges	94%	8.0	8.3
Watermelon	94%	7.4	7.7
Peaches	93%	7.5	7.7
Grapes	92%	7.7	7.8
Cantaloupe	92%	7.1	7.6
Strawberries	91%	7.9	8.1
Blueberries	91%	7.8	8.3
Honeydew	91%	6.9	7.3











Source: Total Respondents (n=1182)

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%	7%	11%	5%	4%
	Bananas	73%	6%	7%	3%	5%
	Blueberries	57%	7%	8%	3%	5%
	Cantaloupe	48%	6%	8%	4%	5%
	Grapes	69%	6%	8%	3%	5%
	Honeydew	40%	5%	7%	5%	5%
	Oranges	68%	6%	6%	4%	5%
	Peaches	53%	6%	9%	5%	4%
	Strawberries	63%	6%	11%	4%	4%
	Watermelon	53%	6%	9%	6%	4%

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

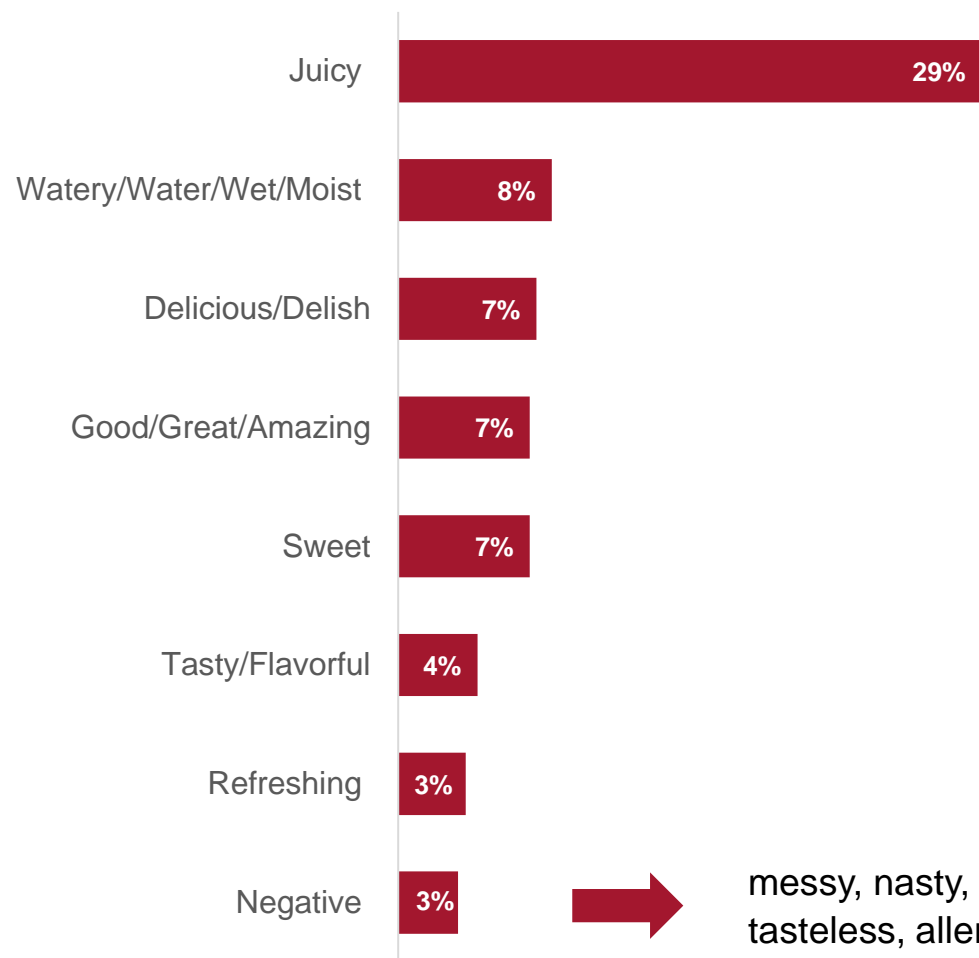
Source: Total Respondents (n=1182)

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



WATERMELON ATTITUDES

Description Using One Word



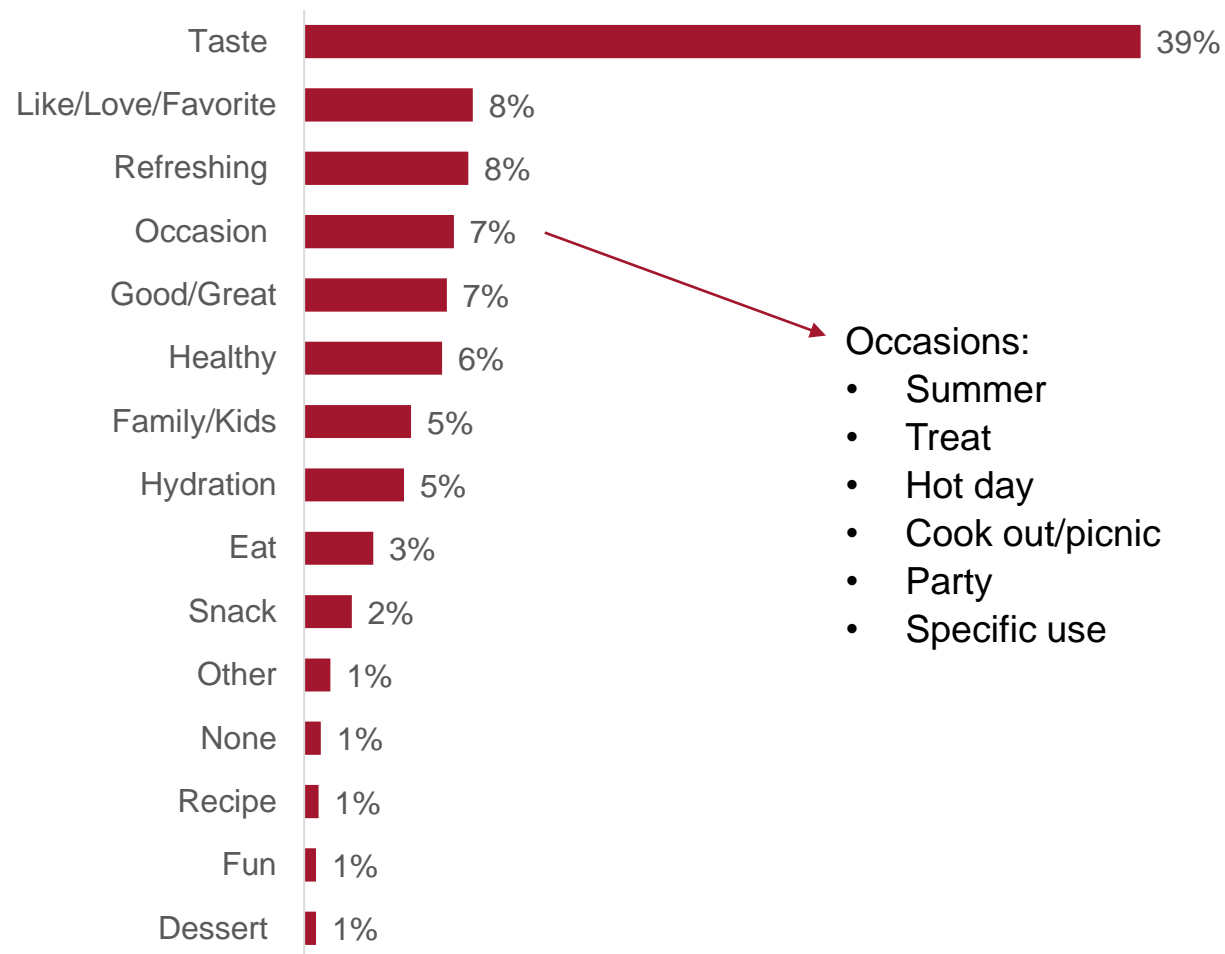
Mentioned by 1-2% of respondents:

- Red/pink/green
- Big/large/huge/heavy/massive
- Fresh
- Summer
- Fun
- Healthy
- Cool/cooling/cold
- Fruit
- Hydrating

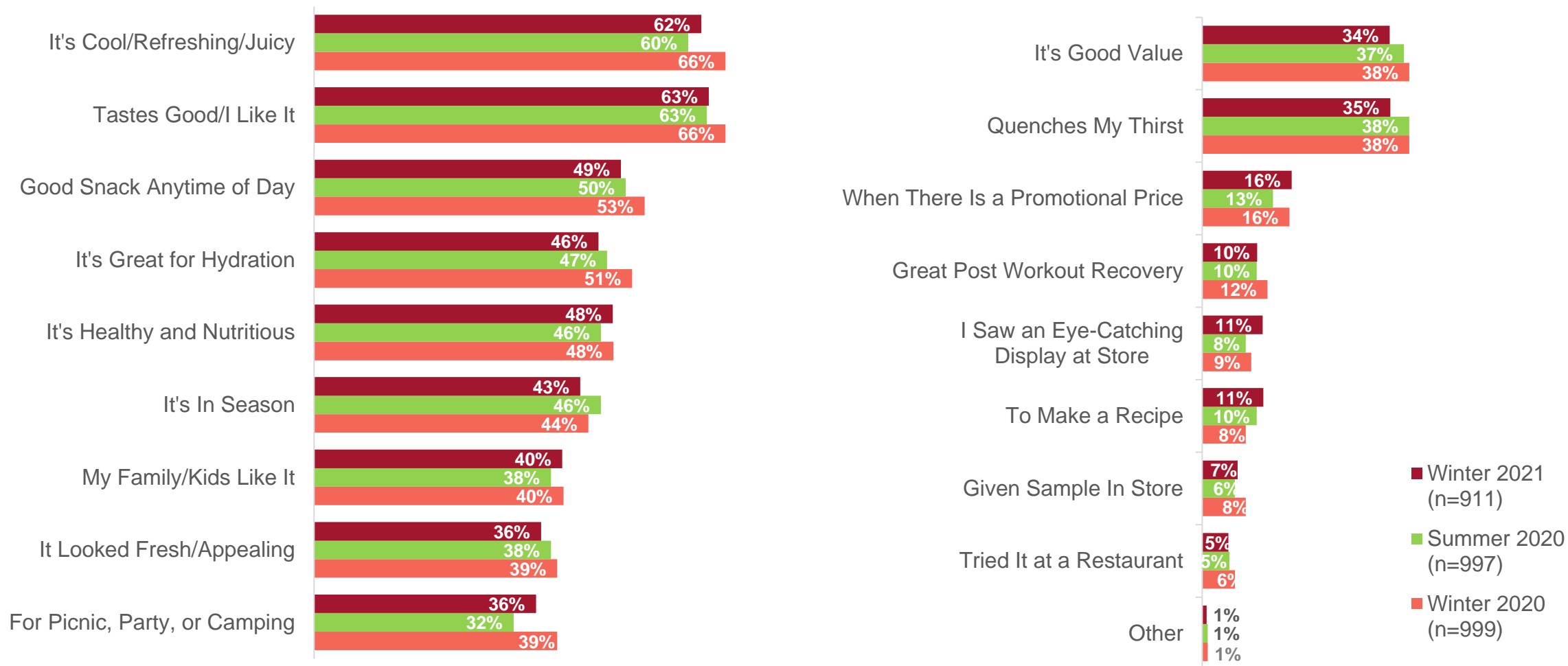


messy, nasty, gross, seedy, disgusting, overrated,
tasteless, allergic, yuck

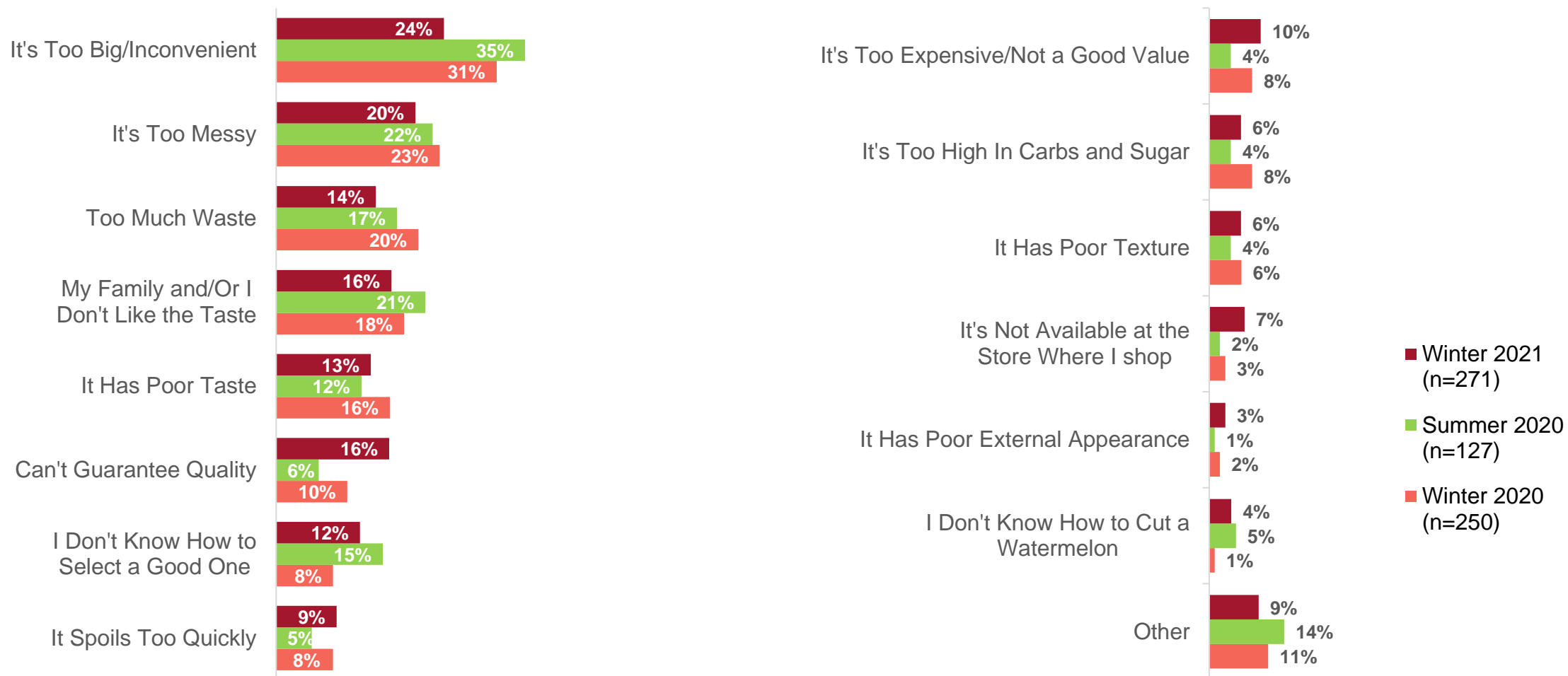
Reasons Purchase Watermelon



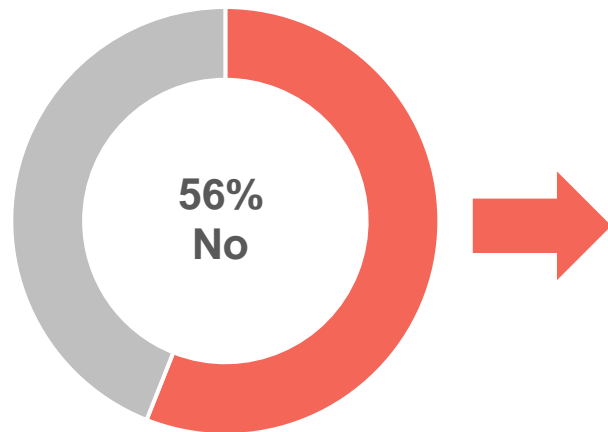
Reasons to Purchase Watermelon



Reasons Not Purchase Watermelon



Willing to Buy Fresh Cut Watermelon

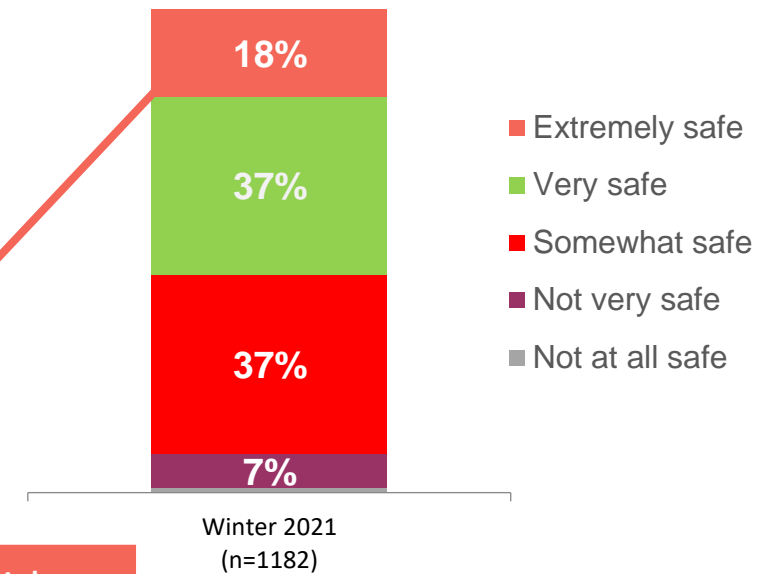


Winter 2021 (n=90)

Reasons won't buy fresh cut watermelon:

- Dislike watermelon/eat other fruits (23)
- Cost (14)
- Doesn't keep (6)
- Cleanliness/safety (3)
- Taste (2)

Safety of Fresh Cut Fruits



Extremely + very safe decreases with age from 60% for 18-34 to 48% for 65+

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

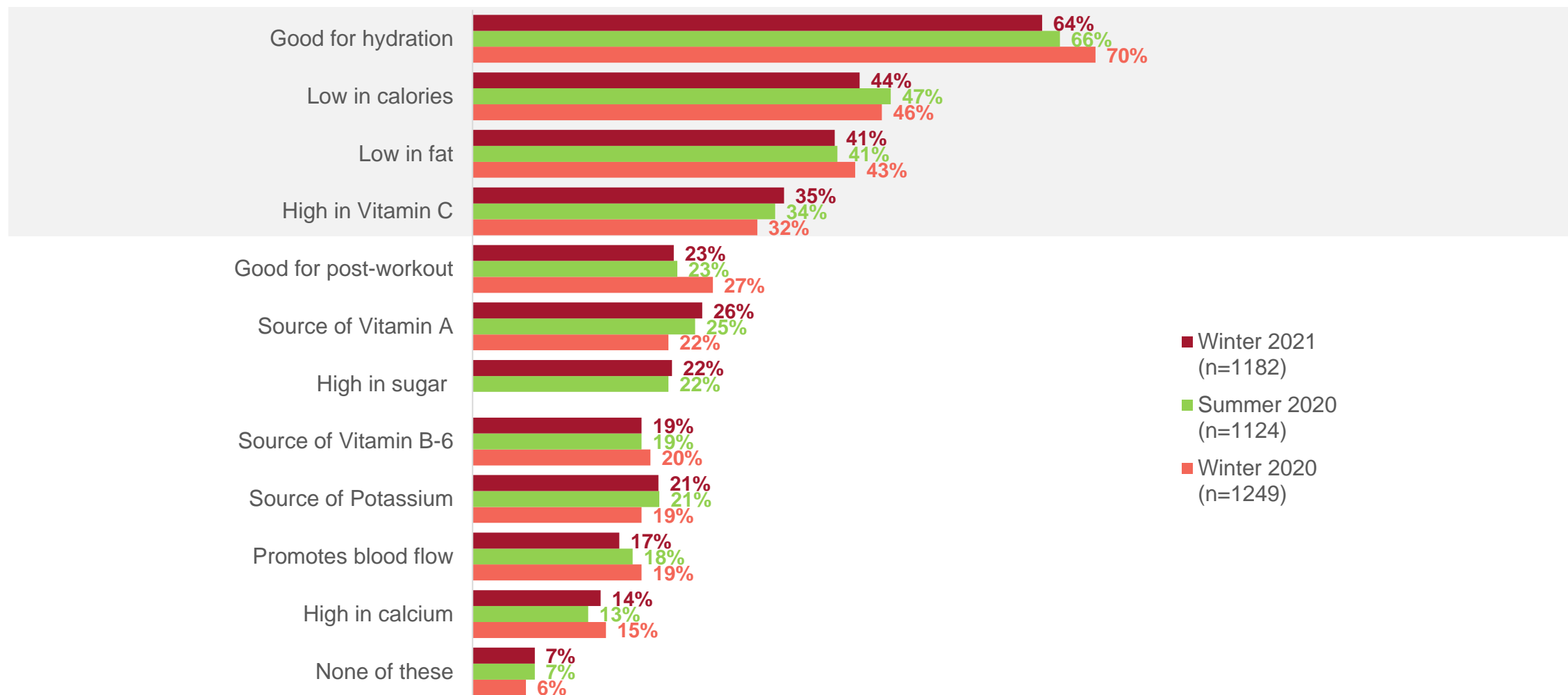
You mentioned you don't buy watermelon because it is messy and/or too big/inconvenient. Would you be willing to spend a bit more for fresh cut, ready to serve watermelon?

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

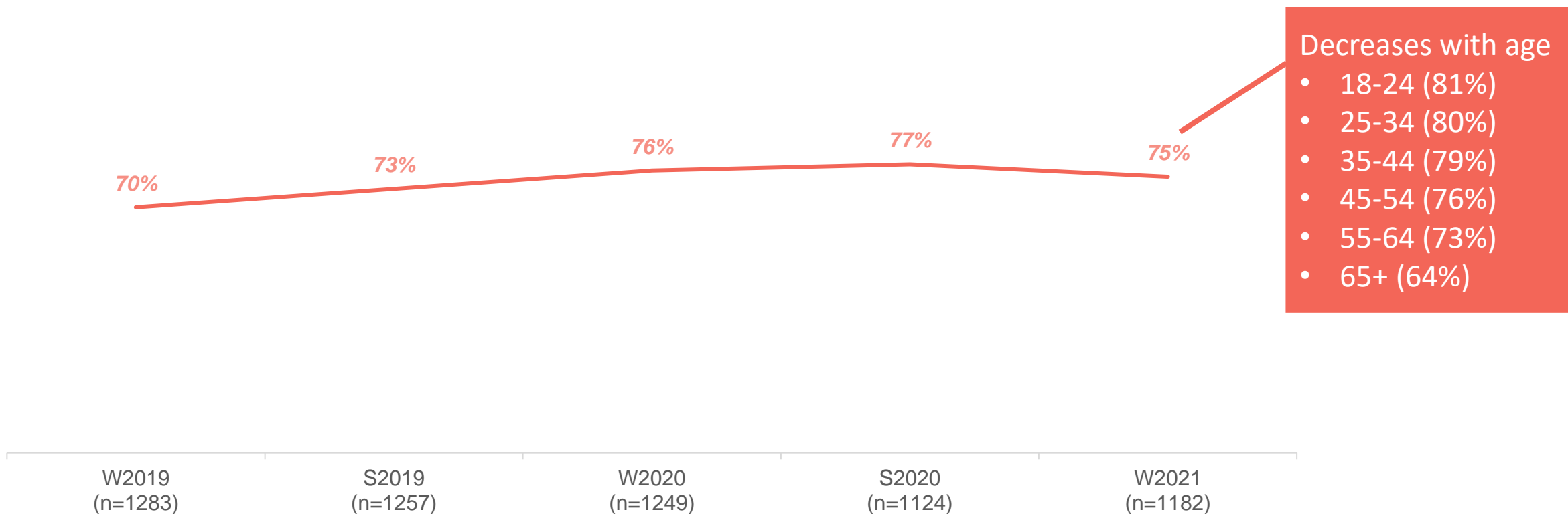
Source: Total Respondents

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

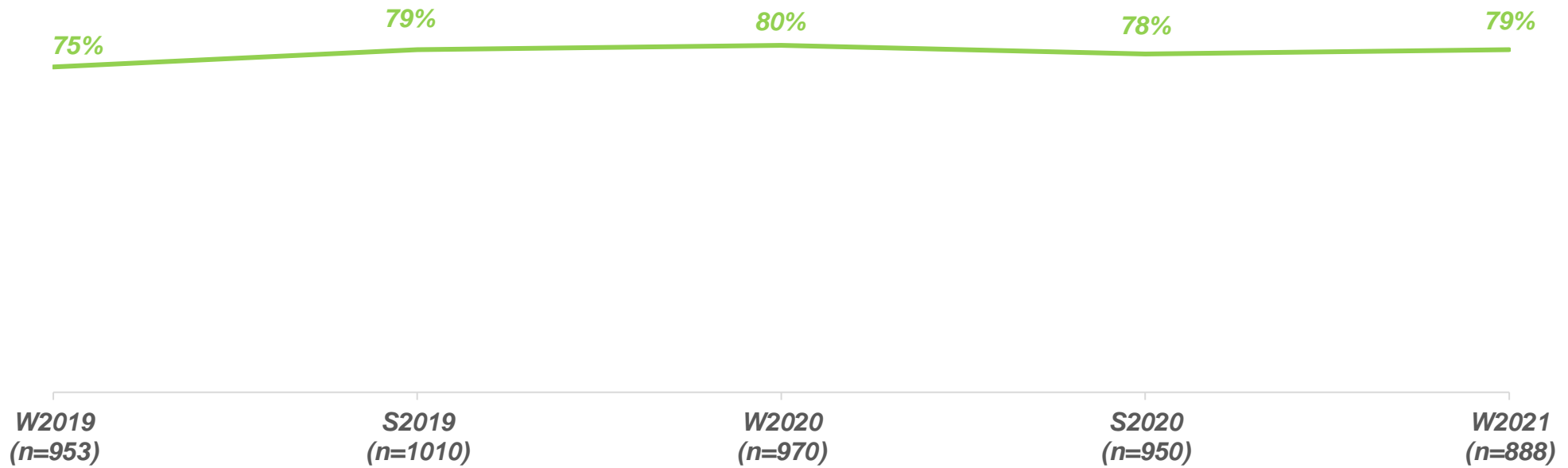
Respondents Understanding of the Benefits of Watermelon



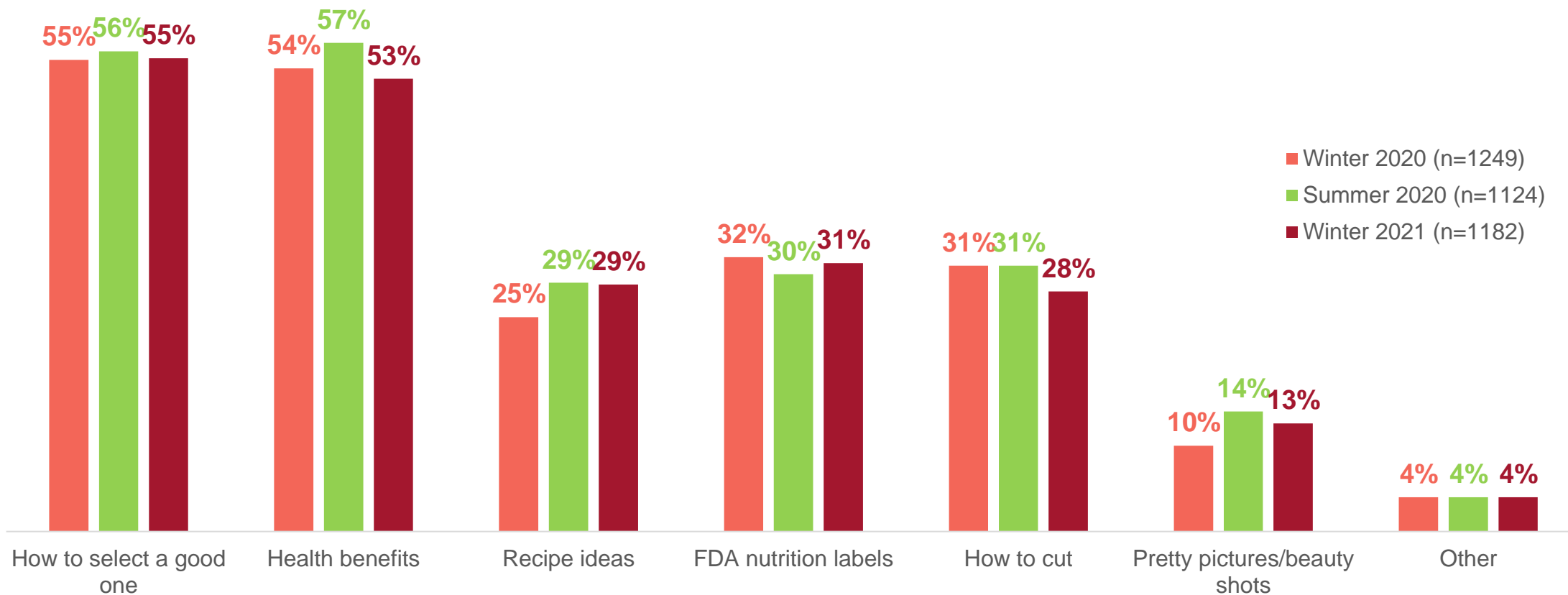
Knowing that Watermelon is Good for Hydration Leads to Purchasing More



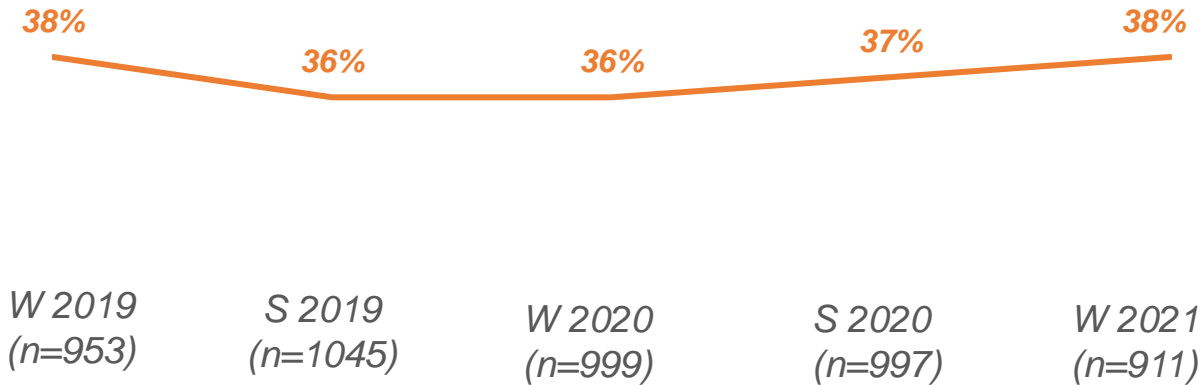
Percent Saying Yes to Knowing How to Pick a Good Watermelon



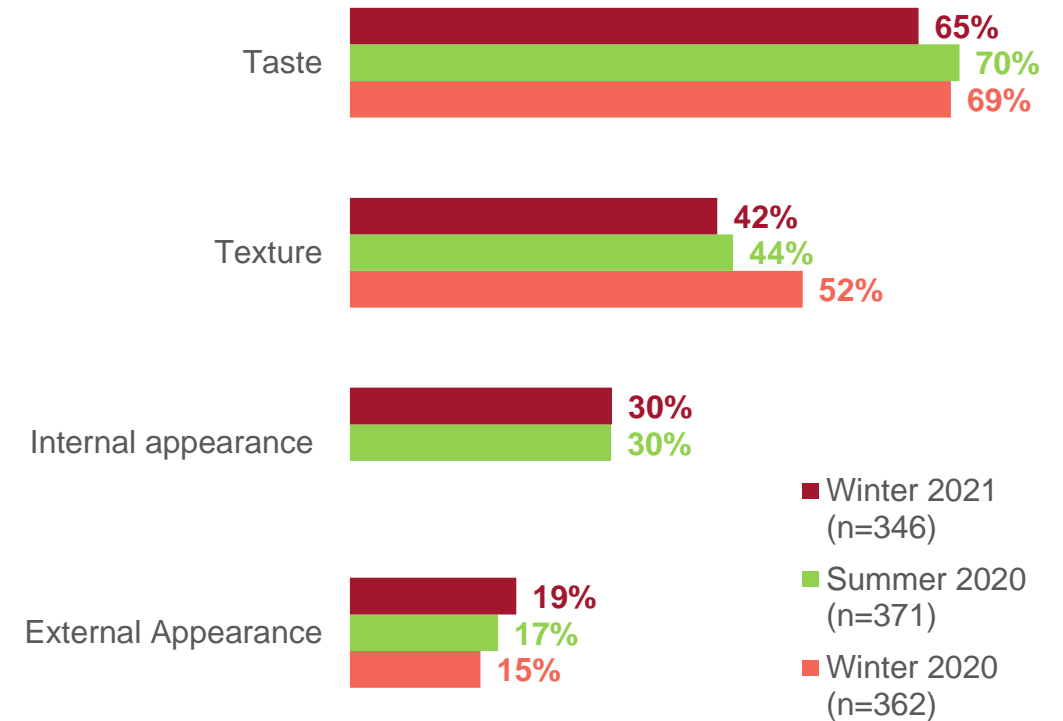
Type of Information Respondents Would Like to See



Percent Indicating Quality Issues with Watermelon Purchase



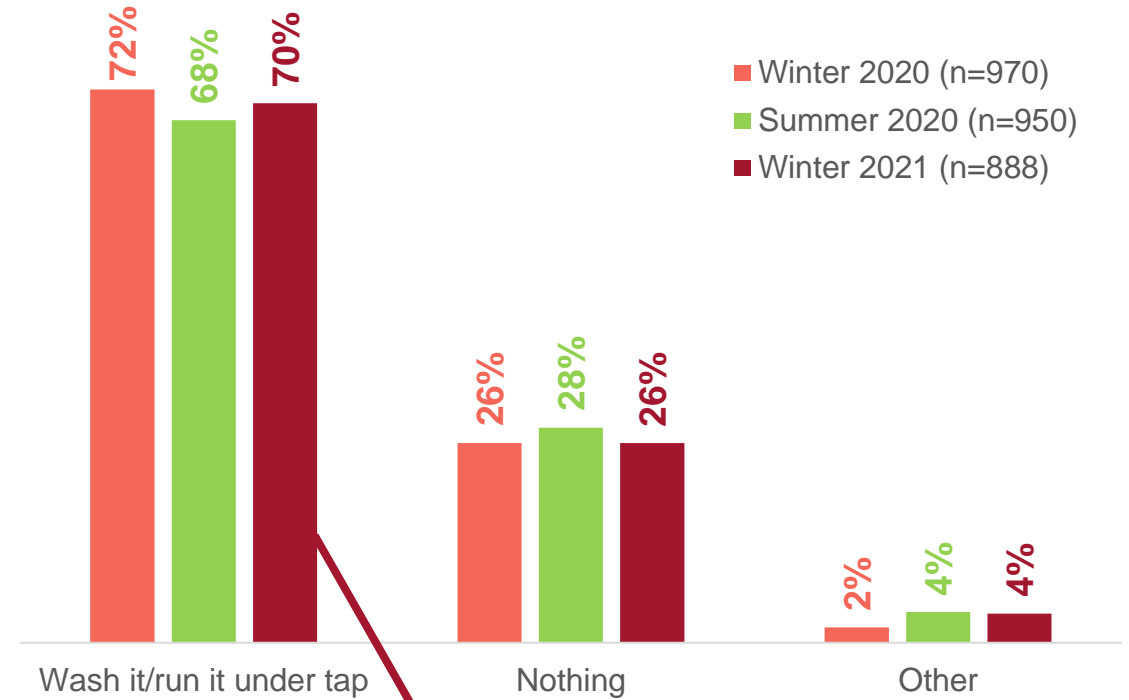
Issues with Watermelon Quality



Those age 18-34 have more external appearance quality issues (36%) while those age 45+ have more internal appearance issues (45%)



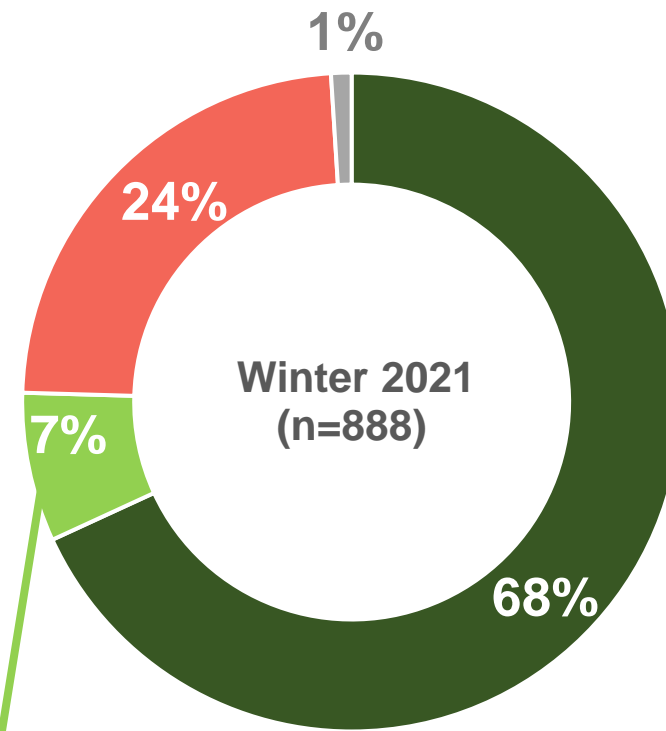
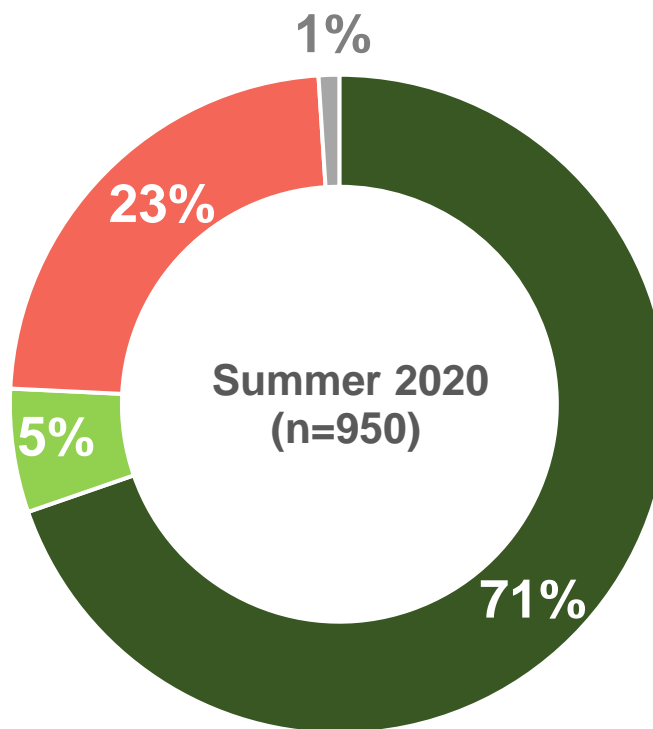
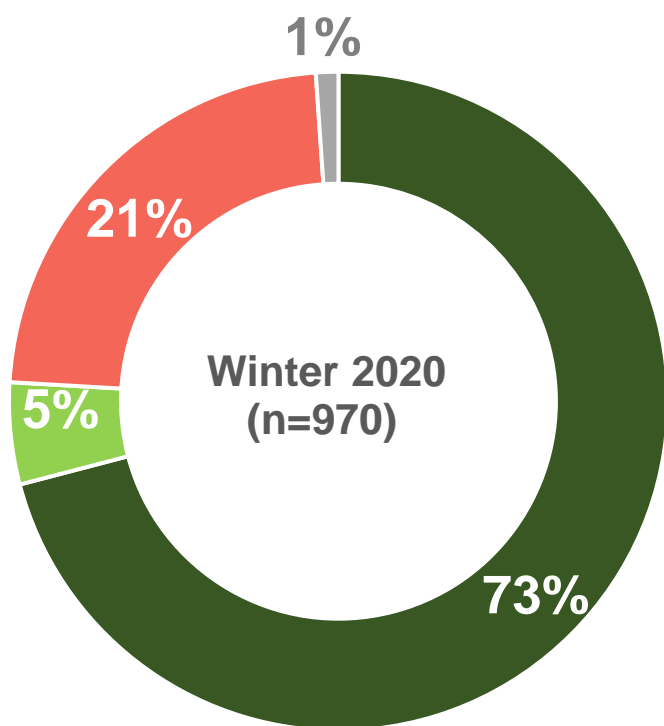
How Watermelon is Being Handled Before Consumption



Washing/running under tap decreases with age from 82% for 18-24 to 61% for 55+

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

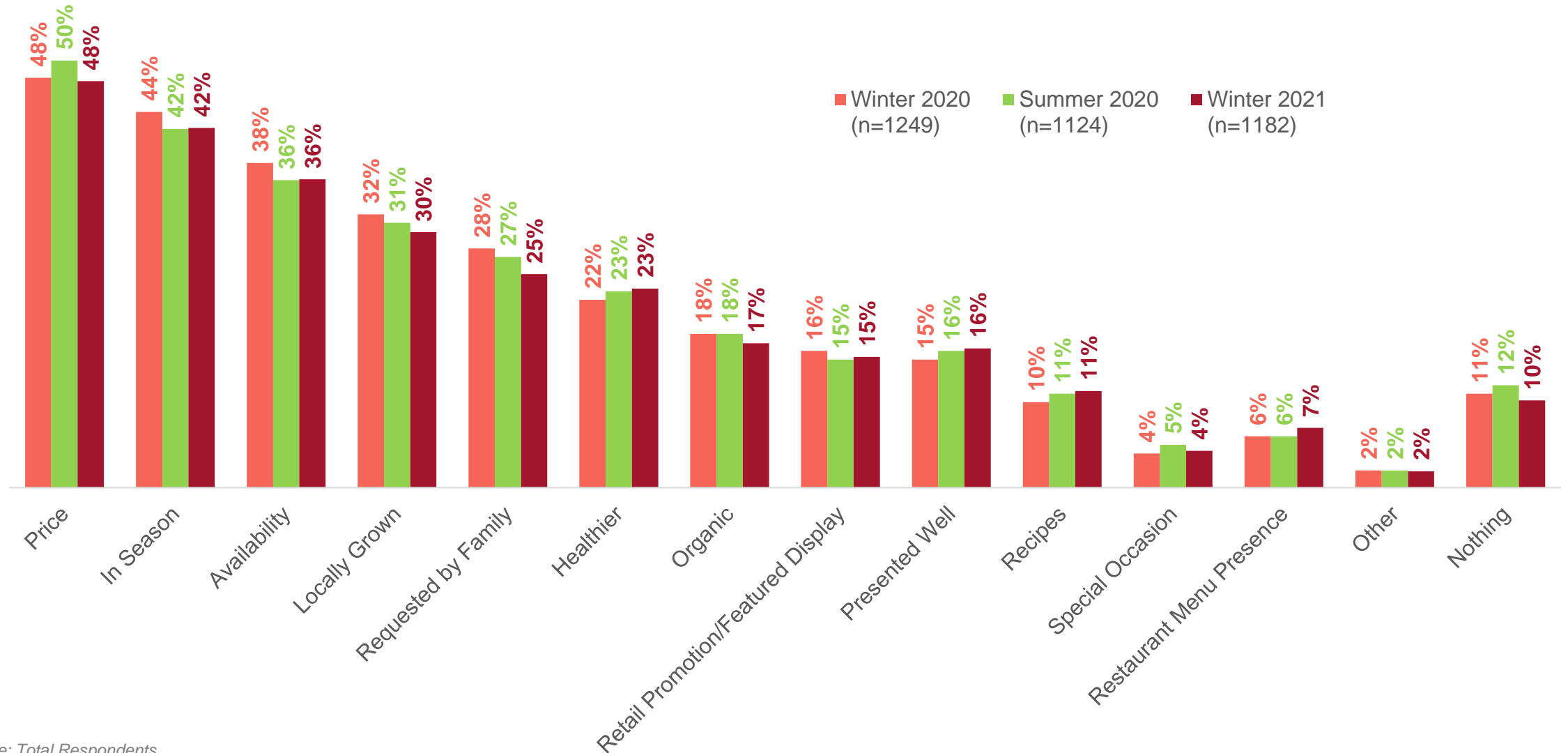
Storage of Whole Watermelon



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

Storage in freezer is double for age 18-34 (14%)

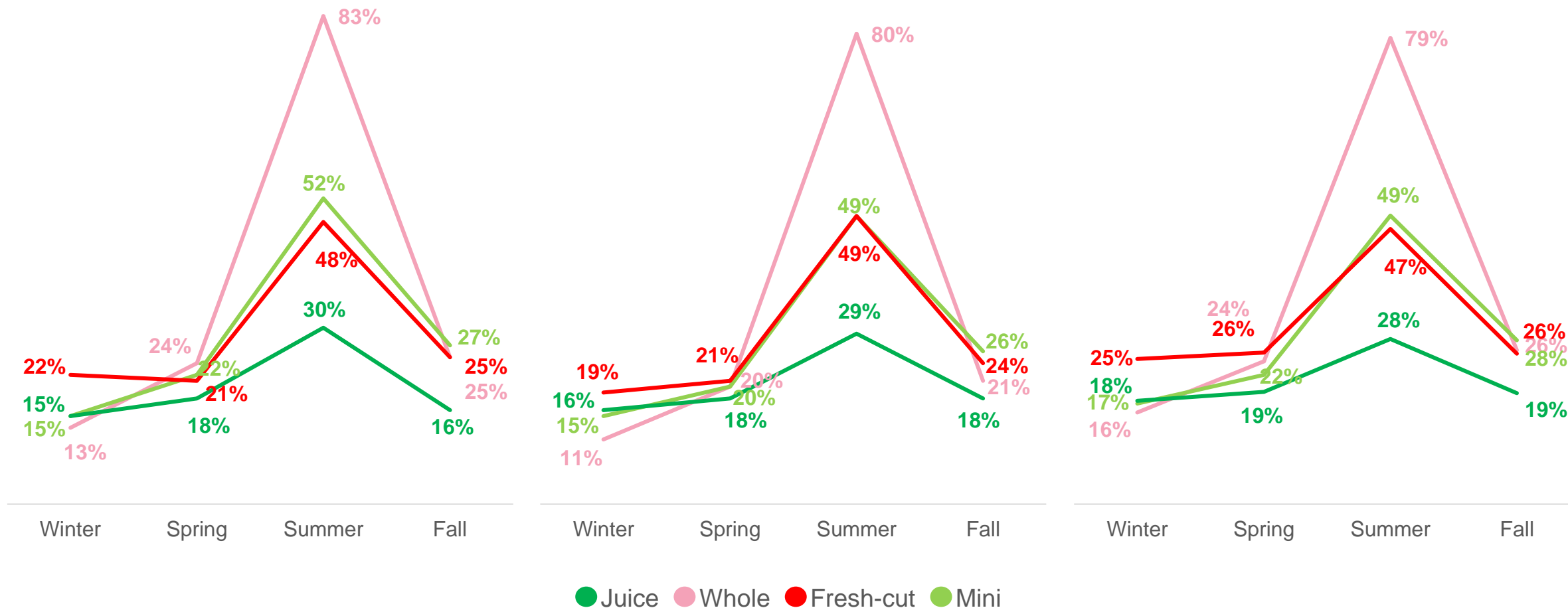
Encourage to Purchase More Watermelon



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

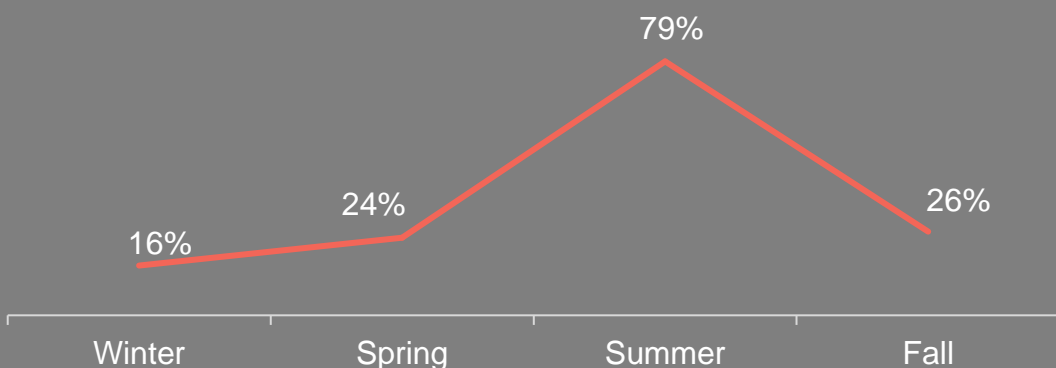
**Seasons Purchased
Summer 2020 (n=997)**

**Seasons Purchased
Winter 2021 (n=911)**



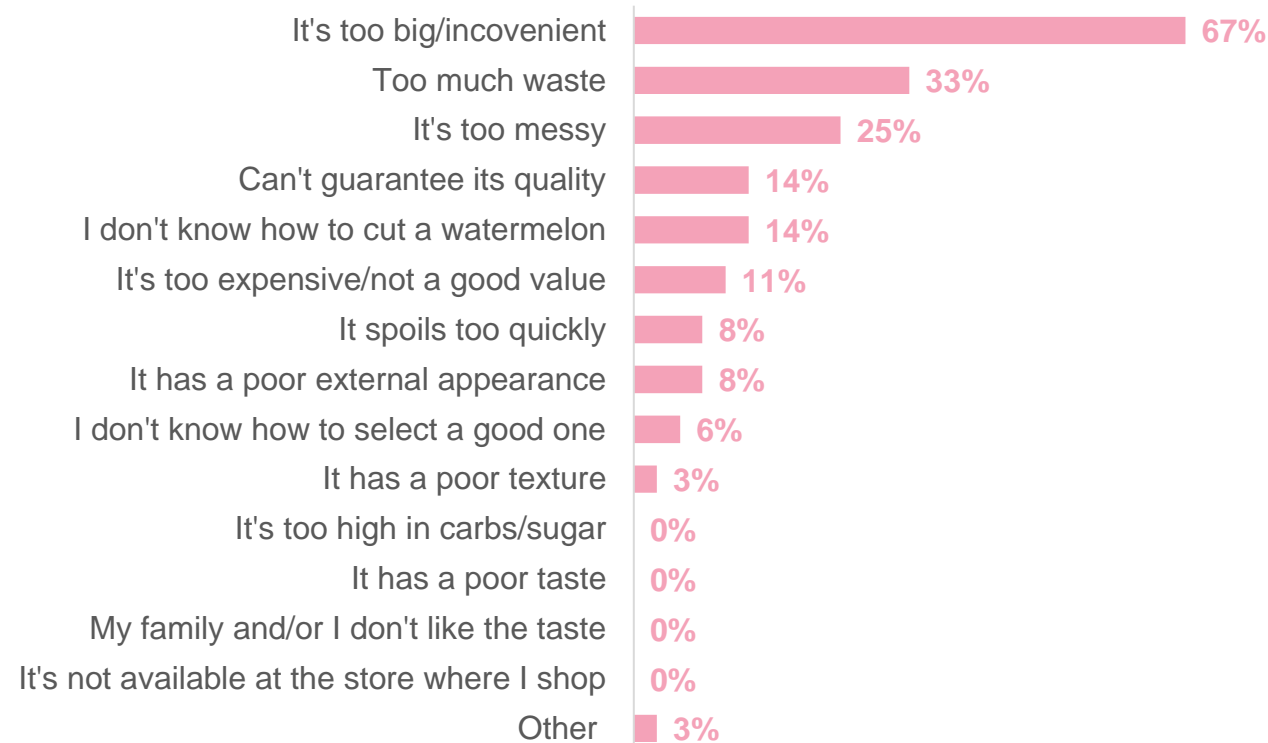
Large Watermelon

Seasons Purchased



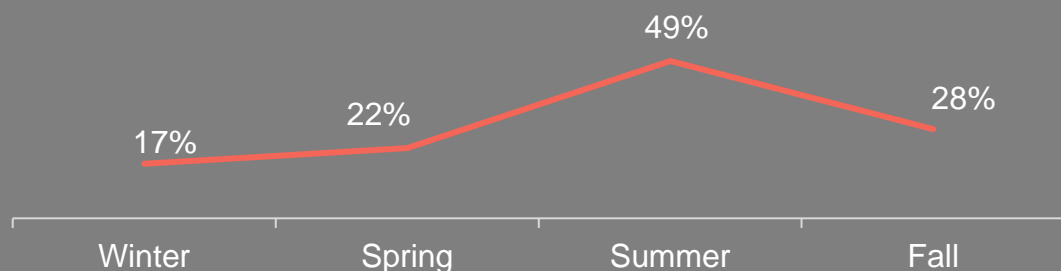
Reasons for Not Purchasing

Of the 4% (n=36) That Do Not Purchase Type of Watermelon



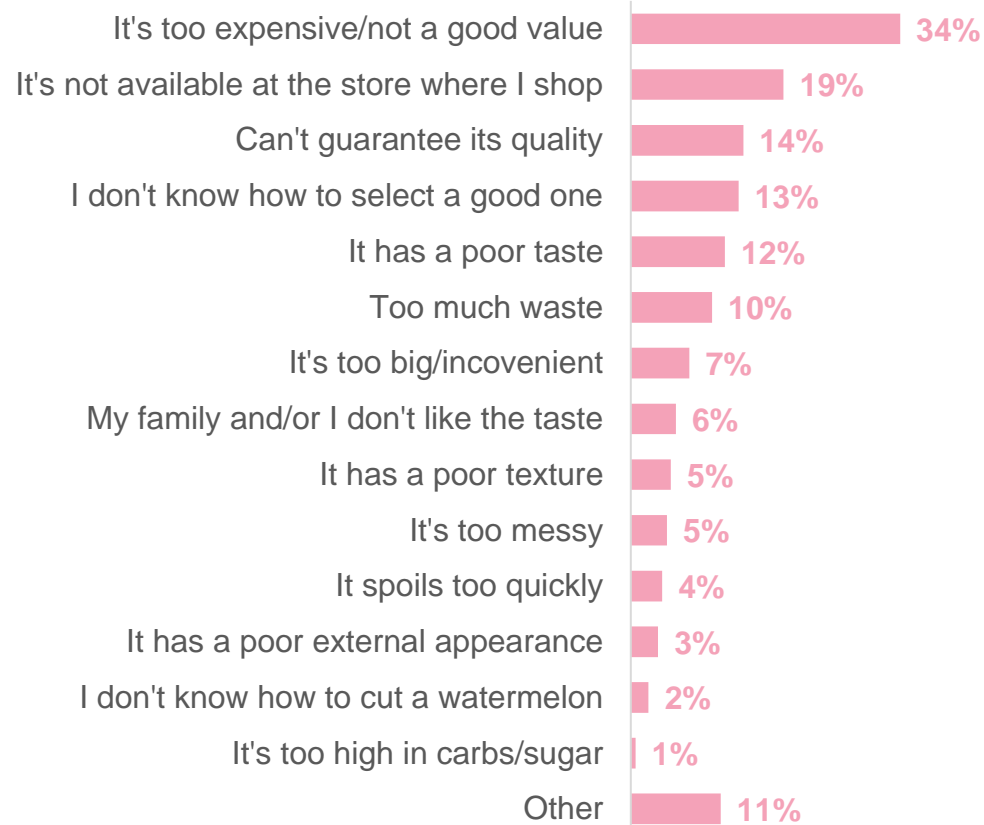
Mini Watermelon

Seasons Purchased



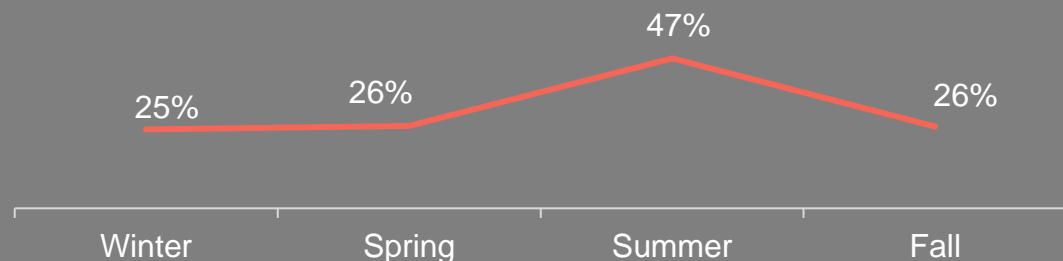
Reasons for Not Purchasing

Of the 20% (n=179) That Do Not Purchase Type of Watermelon



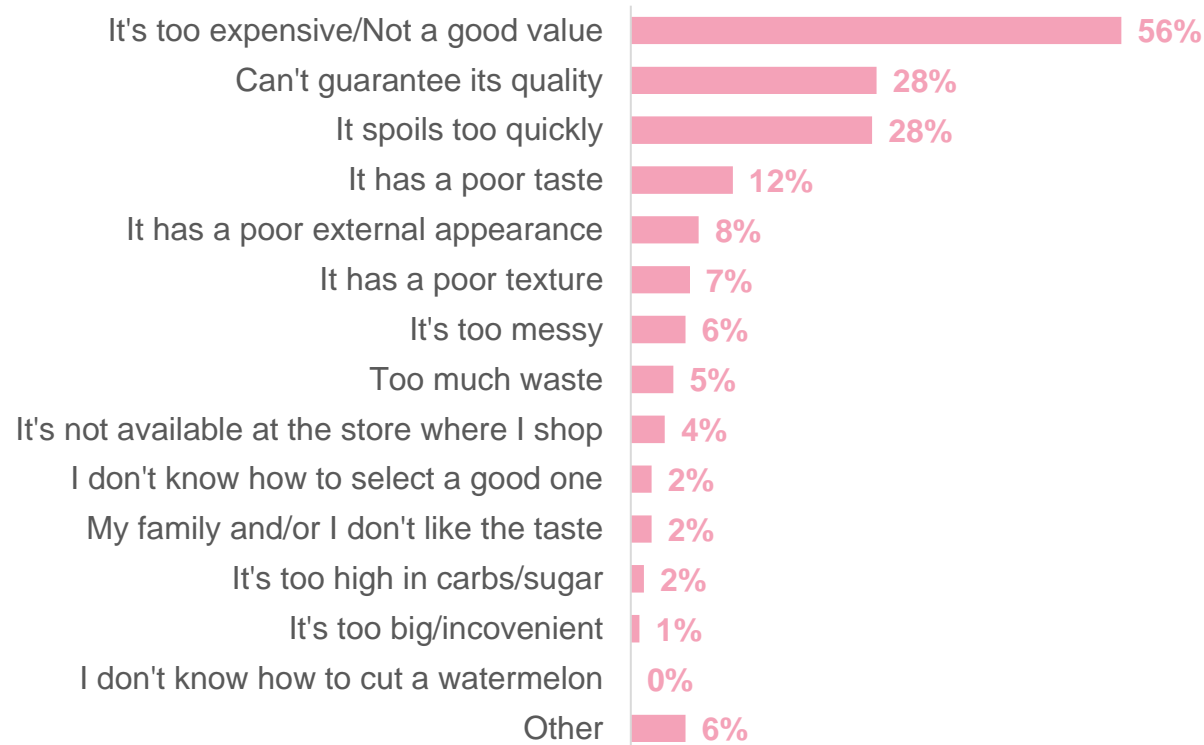
Fresh Cut Watermelon

Seasons Purchased



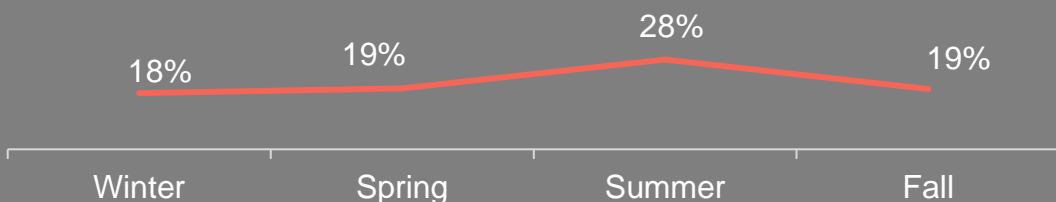
Reasons for Not Purchasing

Of the 23% (n=206) That Do Not Purchase Type of Watermelon



Watermelon Juice

Seasons Purchased

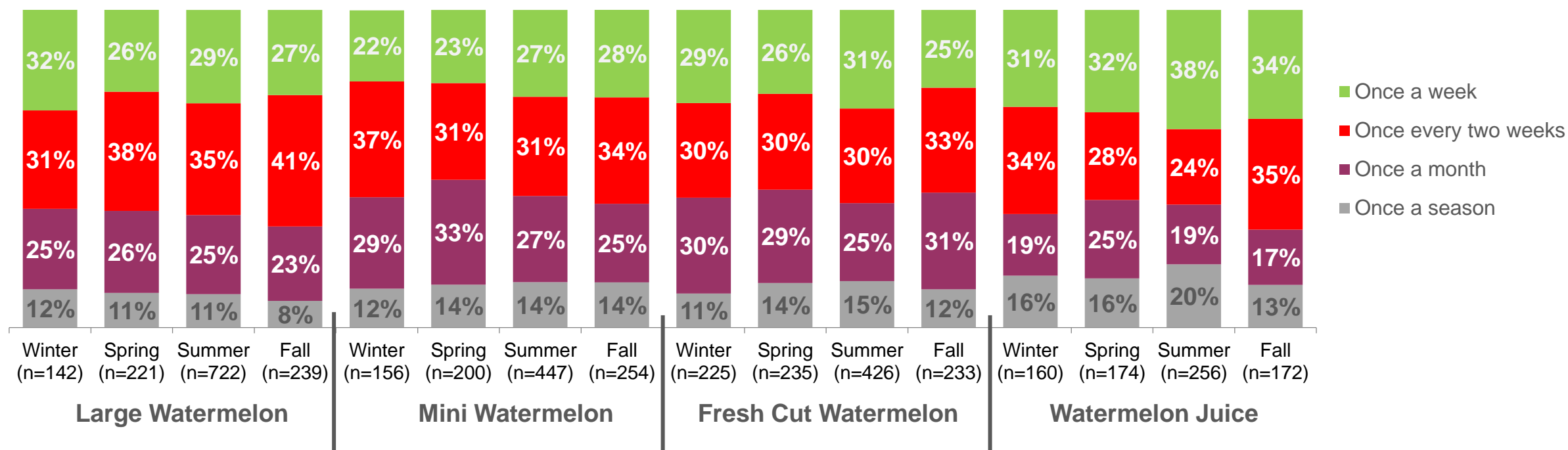


Reasons for Not Purchasing

Of the 47% (n=431) That Do Not Purchase Type of Watermelon



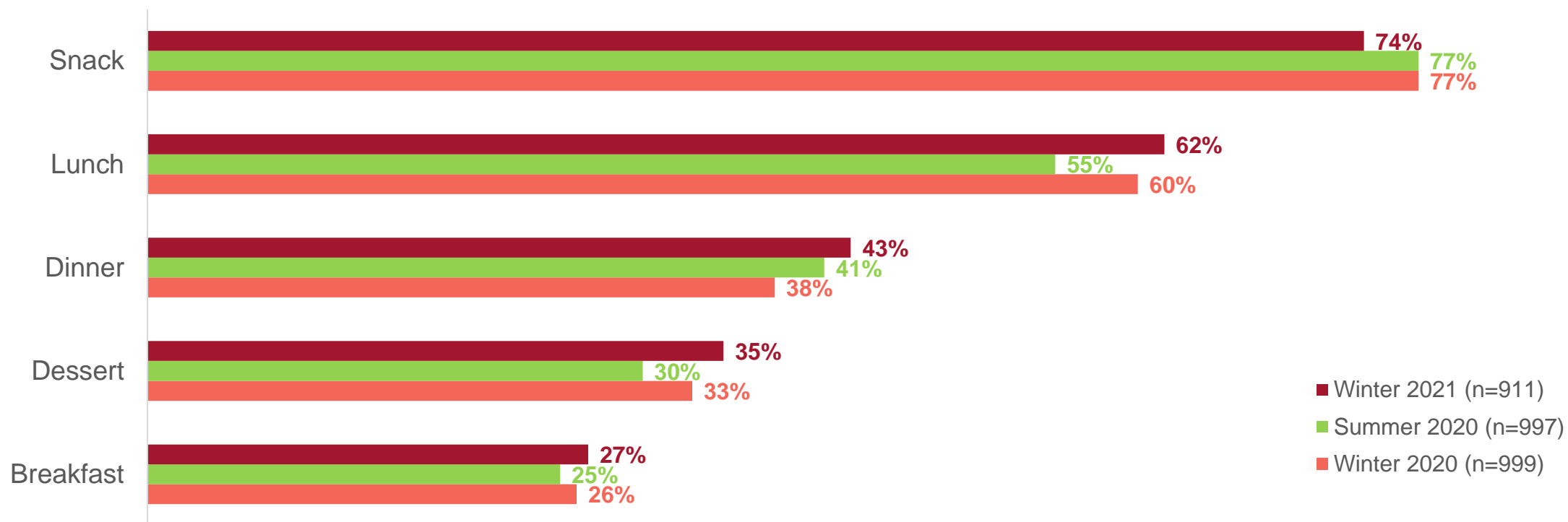
How Often Purchase Specific Kinds of Watermelon by Season



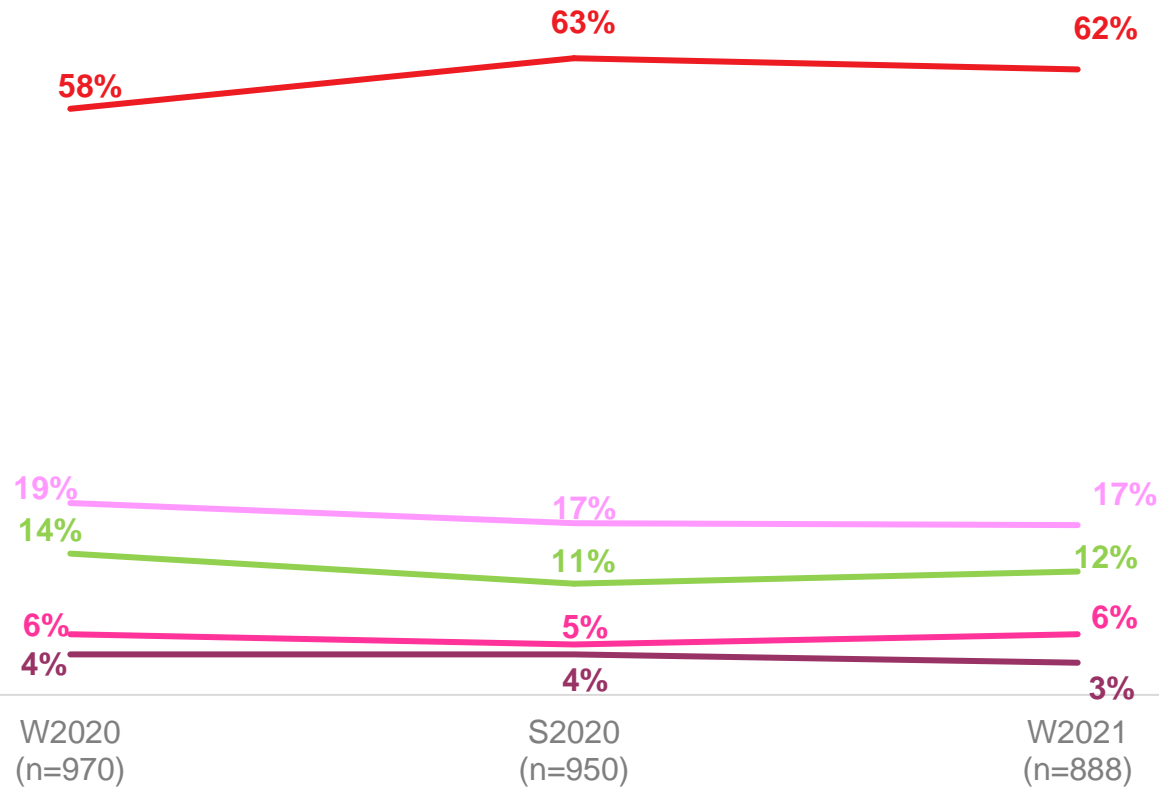
A top-down view of a white oval bowl filled with a fresh salad. The salad consists of large, irregular chunks of bright red watermelon, several whole dark purple olives, and small cubes of white feta cheese. Fresh green basil leaves are scattered throughout, with a larger sprig of basil prominently placed in the center. The bowl sits on a light blue-grey wooden surface with visible grain. Two small, delicate purple flowers are placed on the surface to the right of the bowl. The text 'WATERMELON CONSUMPTION' is overlaid in the bottom left corner in a bold, white, sans-serif font.

WATERMELON CONSUMPTION

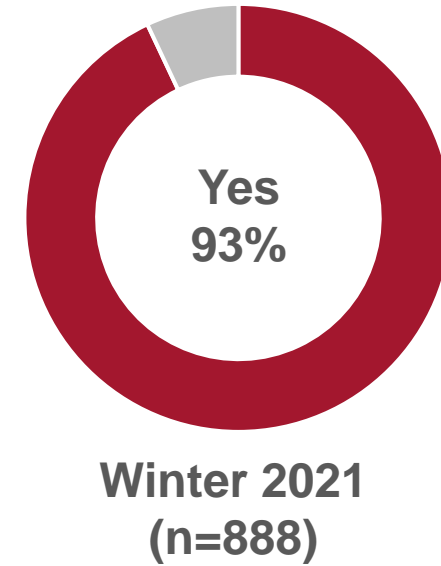
Time of Day Watermelon is Eaten



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

Consumption by Percentage of Time

Winter 2020
(n=999)

90%
Plain watermelon

10%
In a recipe

Summer 2020
(n=997)

86%
Plain watermelon

14%
In a recipe

Winter 2021
(n=911)

85%
Plain watermelon

15%
In a recipe

Location of Consumption by Percentage of Time

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

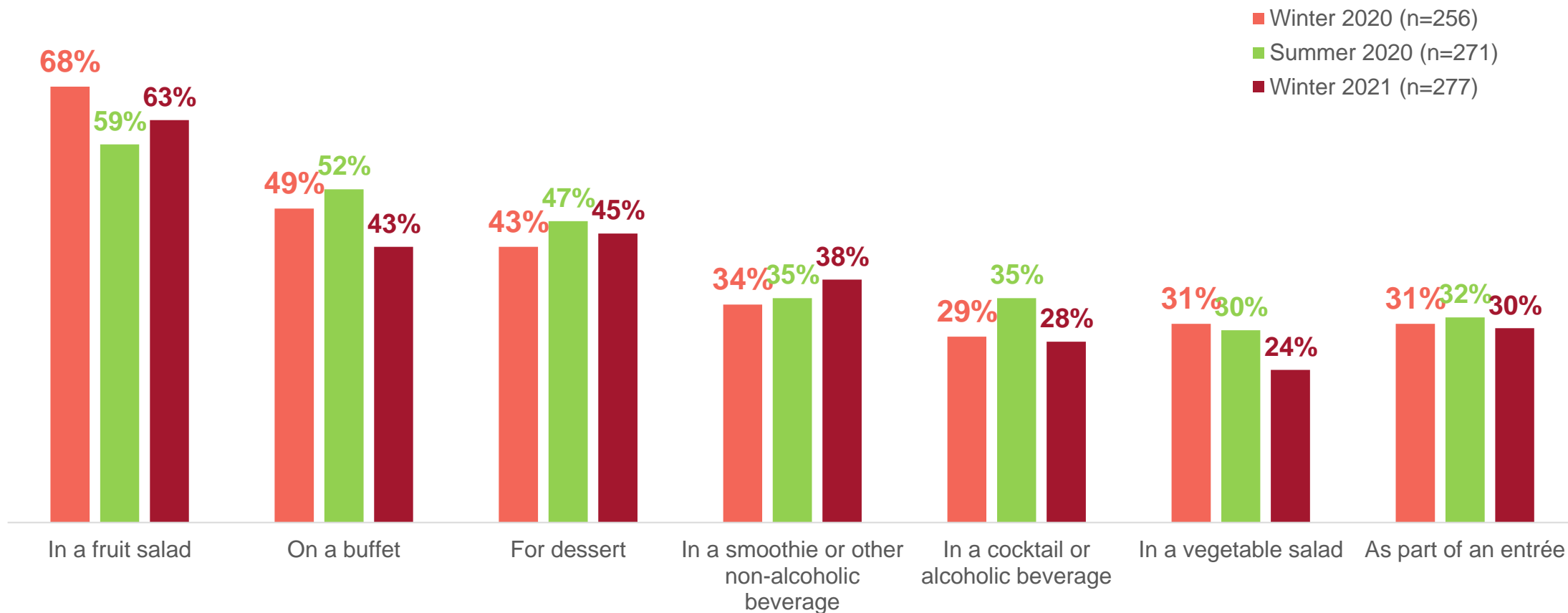
Winter 2021
(n=911)

75%
In my home

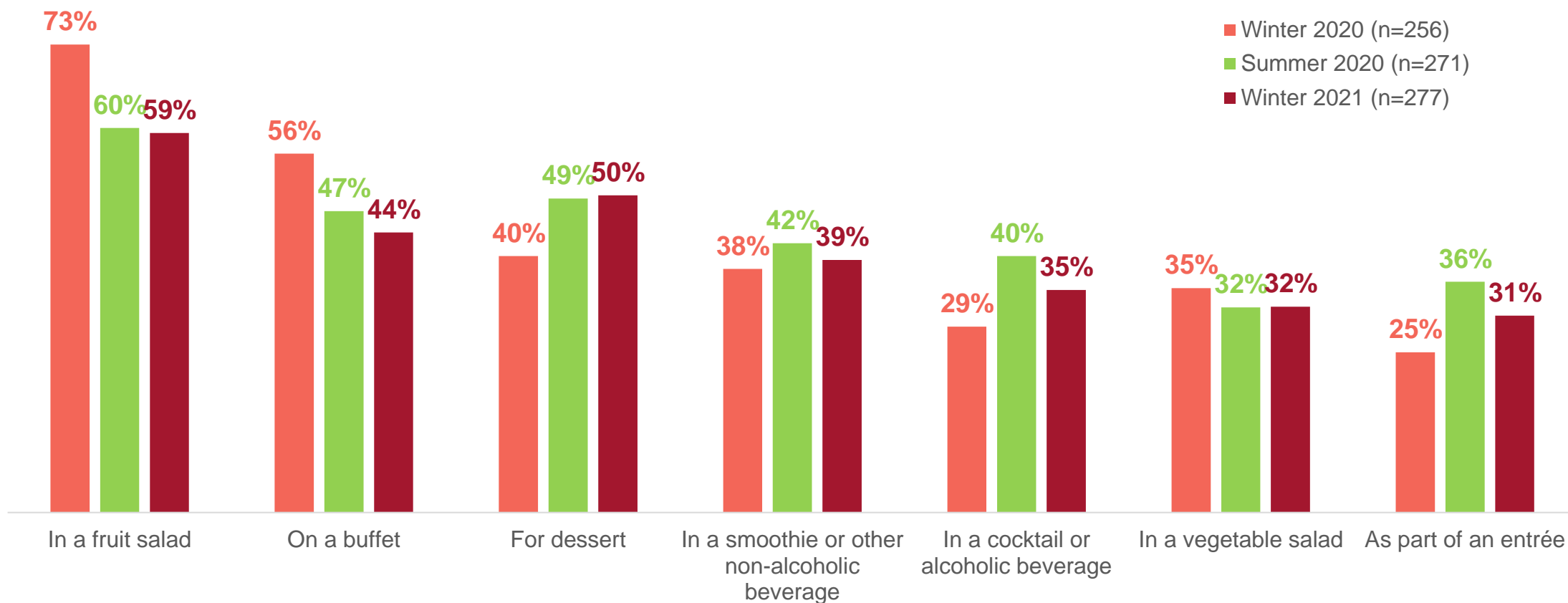
17%
Outside my home

8%
Restaurant or other food
service location

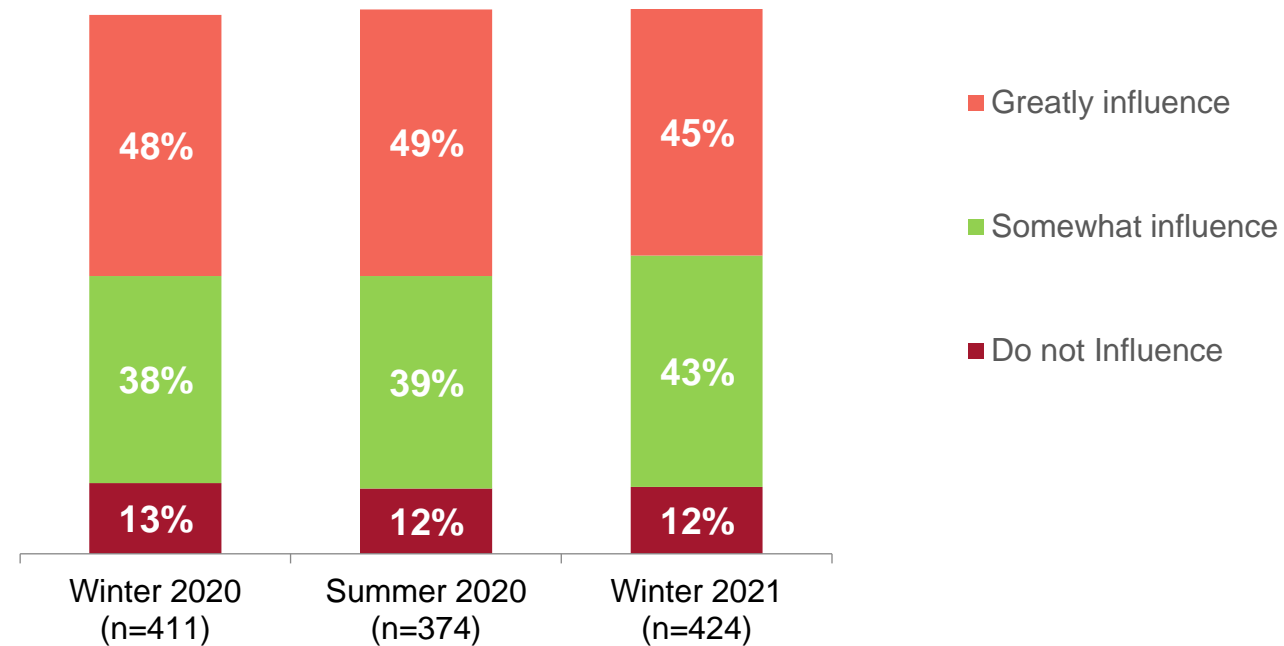
Ways Watermelon is Consumed in a Restaurant



Ways Watermelon is Considered in a Restaurant



Influence Children Have on Watermelon Purchases



Key Findings

- Taste and watermelon's refreshing quality continue to be 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 (cantaloupe and honeydew).
- 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. Perceptions of safety of fresh cut fruit decreases with age.
- Younger generations are more likely to purchase watermelon based on knowing that watermelon is good for hydration. This may be driven by greater awareness of how important it is to stay hydrated because of the messaging behind common sports drinks.

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.
 - Regarding quality issues, younger generations tend to report more external appearance quality issues while older generations report more internal appearance quality issues.
- There is an opportunity to provide guidance to pick-up and delivery shoppers on how to pick a good watermelon. Trust in those choosing their produce decreases with age which likely leads to less pick-up and delivery shopping for the older generations.
- COVID-19 is likely impacting a few measures versus previous studies that may lead to trends in the future.
 - More washing of watermelon before consumption especially among younger generations.
 - Decrease in percent of people who like the taste of certain fruits.
 - Decrease in purchases at farmers markets.
 - More pick-up/delivery grocery shopping especially among younger generations.
 - Differences in how might consider consuming watermelon in restaurants.
- In the future may want to ask additional questions on social media usage with regards to food. Younger generations have a higher social media usage, and also care most about how watermelon is presented in stores. Do they care so much because they are wanting to post pictures of their food (watermelon) on social media?



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