



NATIONAL WATERMELON PROMOTION BOARD

Summer Consumer Research Findings

September 2021



AimpointResearch.com

PURPOSE

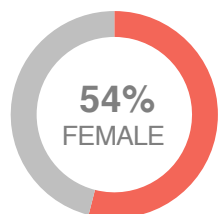
To design and implement a consumer tracking survey to enable the National Watermelon Promotion Board to grow demand

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 1127 Completes

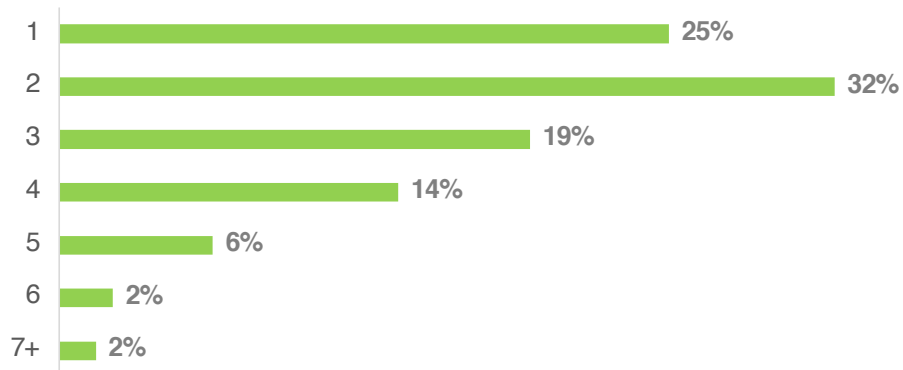


Gender

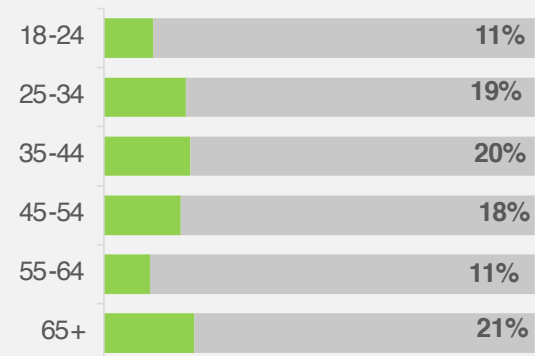


The primary food shopper

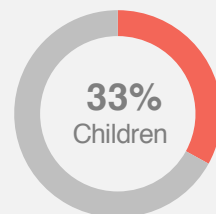
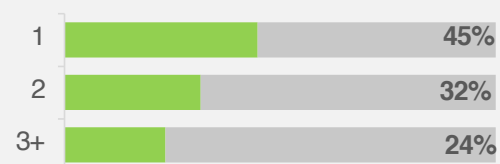
Number of People Living in Household



Age

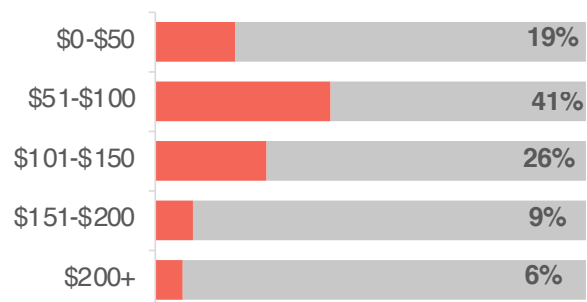


Number of Children (among those with children)

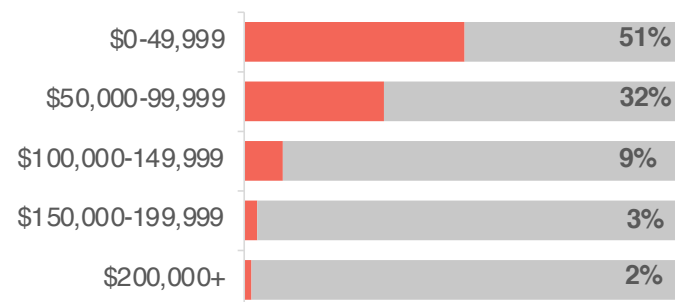


Demographics of Respondents (n=1127)

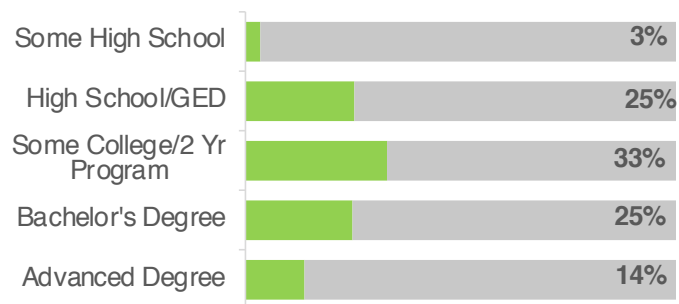
Weekly Grocery Spend



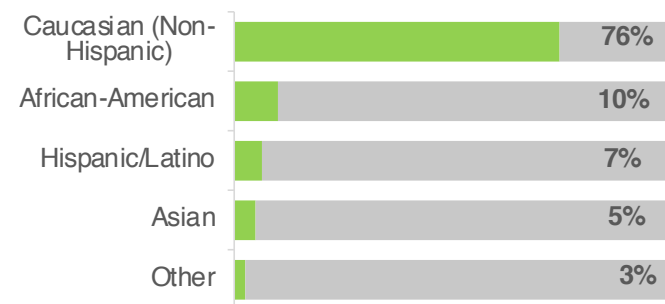
Household Income



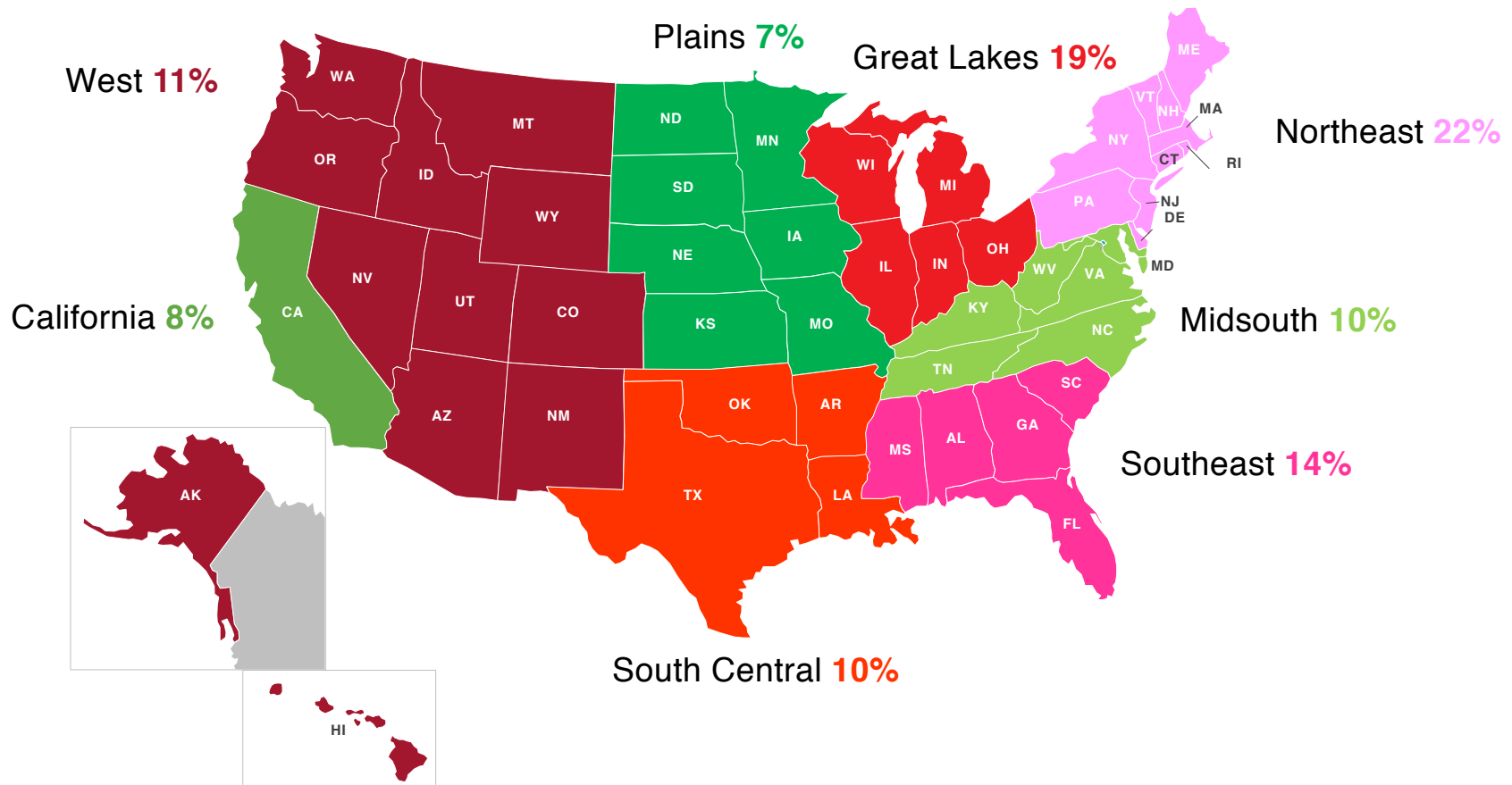
Education Level



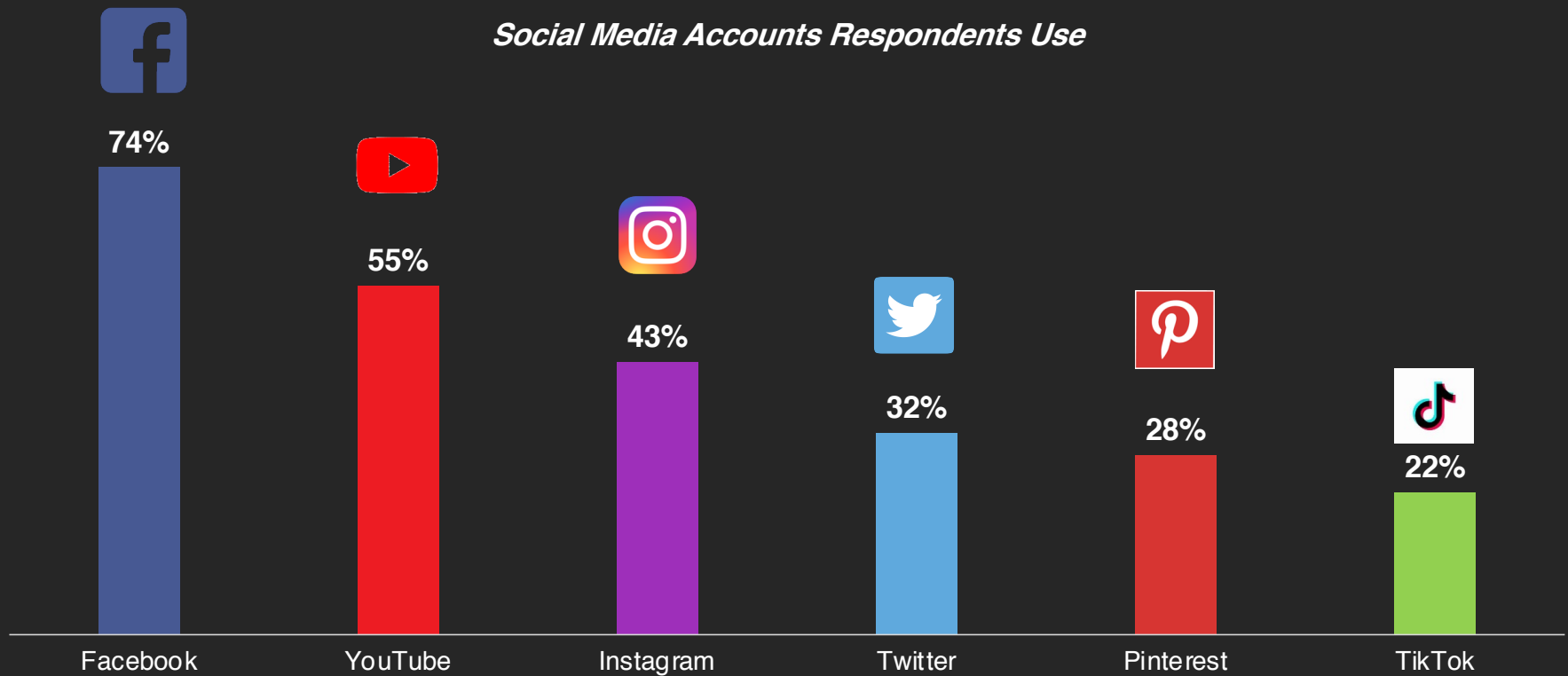
Race/Ethnicity



Demographics of Respondents (n=1127)



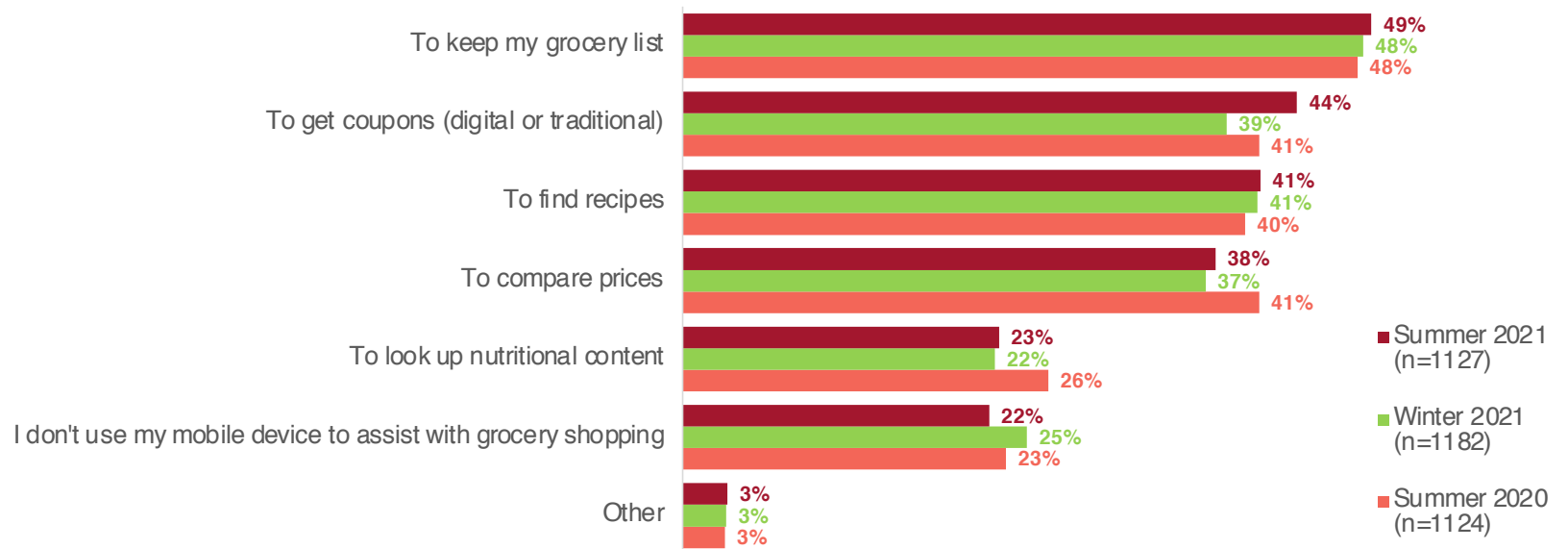
Social Media Accounts Respondents Use



Source: Total Respondents (n=1127)
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

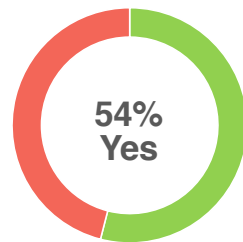


Source: Total Respondents

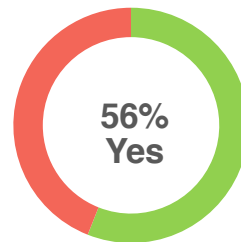
Please indicate below how you have used your mobile device to assist you with your grocery shopping? (Select all that apply)



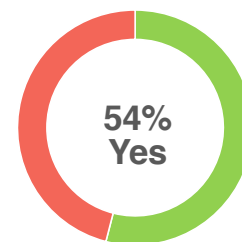
Ever Used Grocery Pick-up, Delivery, or Meal Kit Delivery



Summer 2020
(n=1124)



Winter 2021
(n=1182)



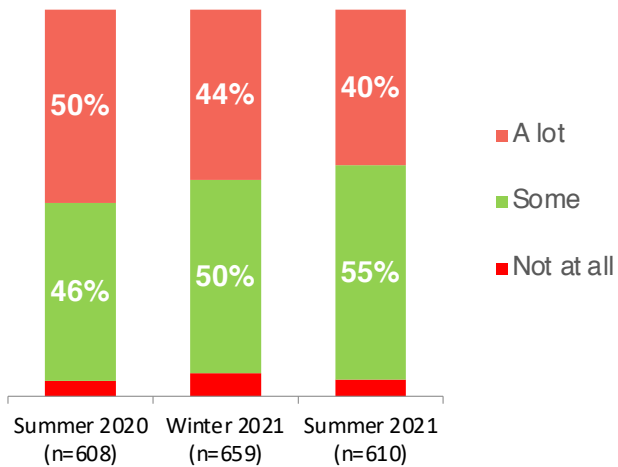
Summer 2021
(n=1127)

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.



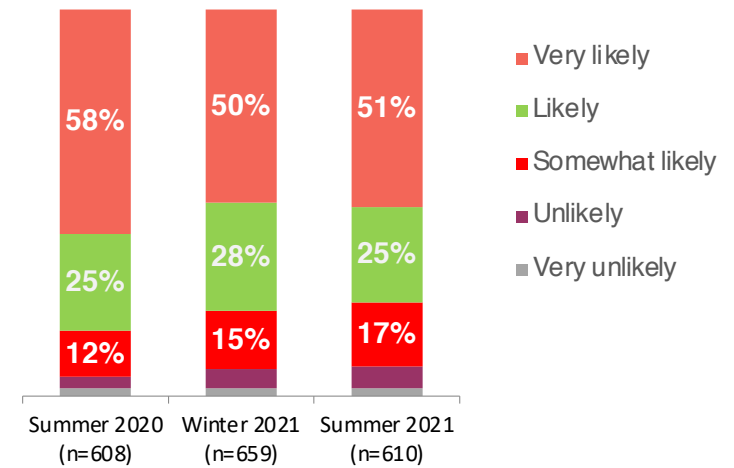
Trust to Select Produce



Services used in past 12 months

- Delivery from retail location (58%)
- Curbside pick-up (54%)
- Third party delivery (42%)
- Other (1%)

Likelihood to Continue Using

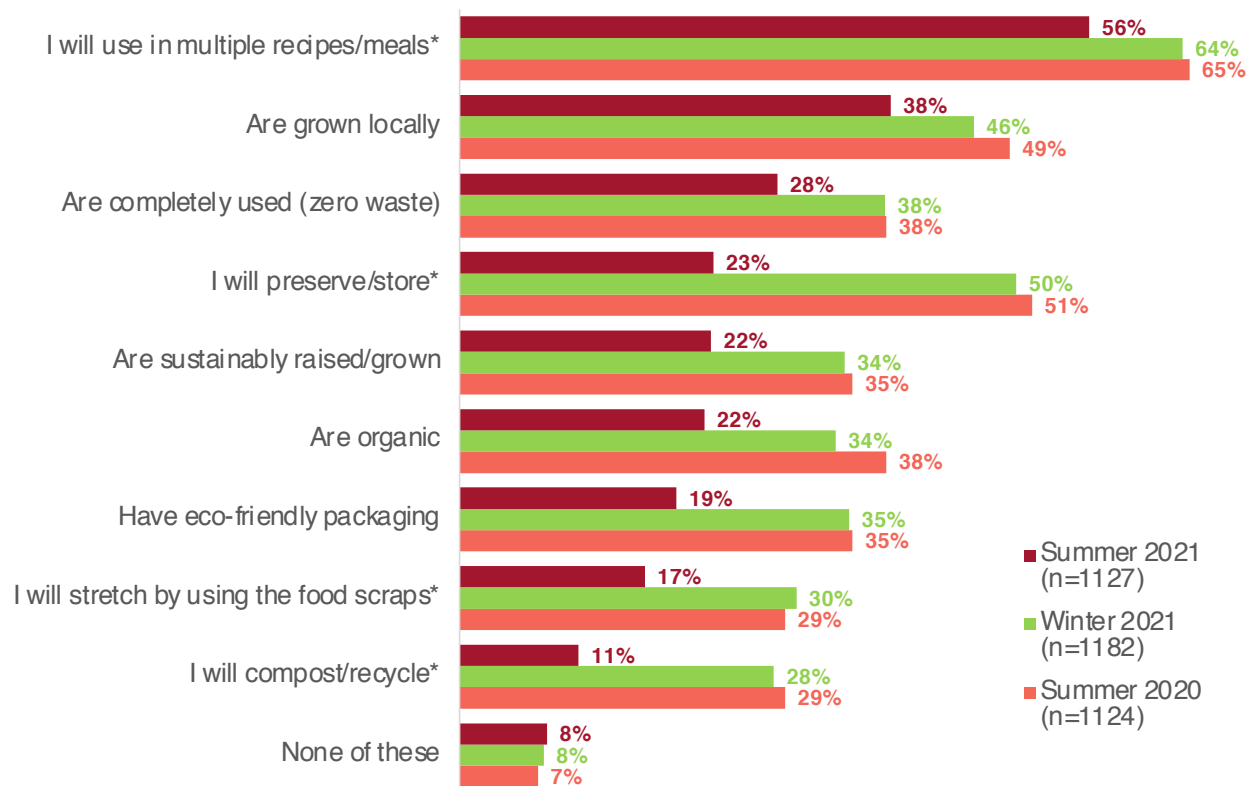


Source: Total Respondents Ever Using Grocery Pick-up or Delivery
 Which of the following grocery pick-up or grocery delivery services have you used in the past 12 months? (Select all that apply)
 How much do you trust the person who is selecting your produce for your grocery pick-up/delivery order to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



Source: Total Respondents

I feel better when I make food purchases that: (Select up to 3 items)

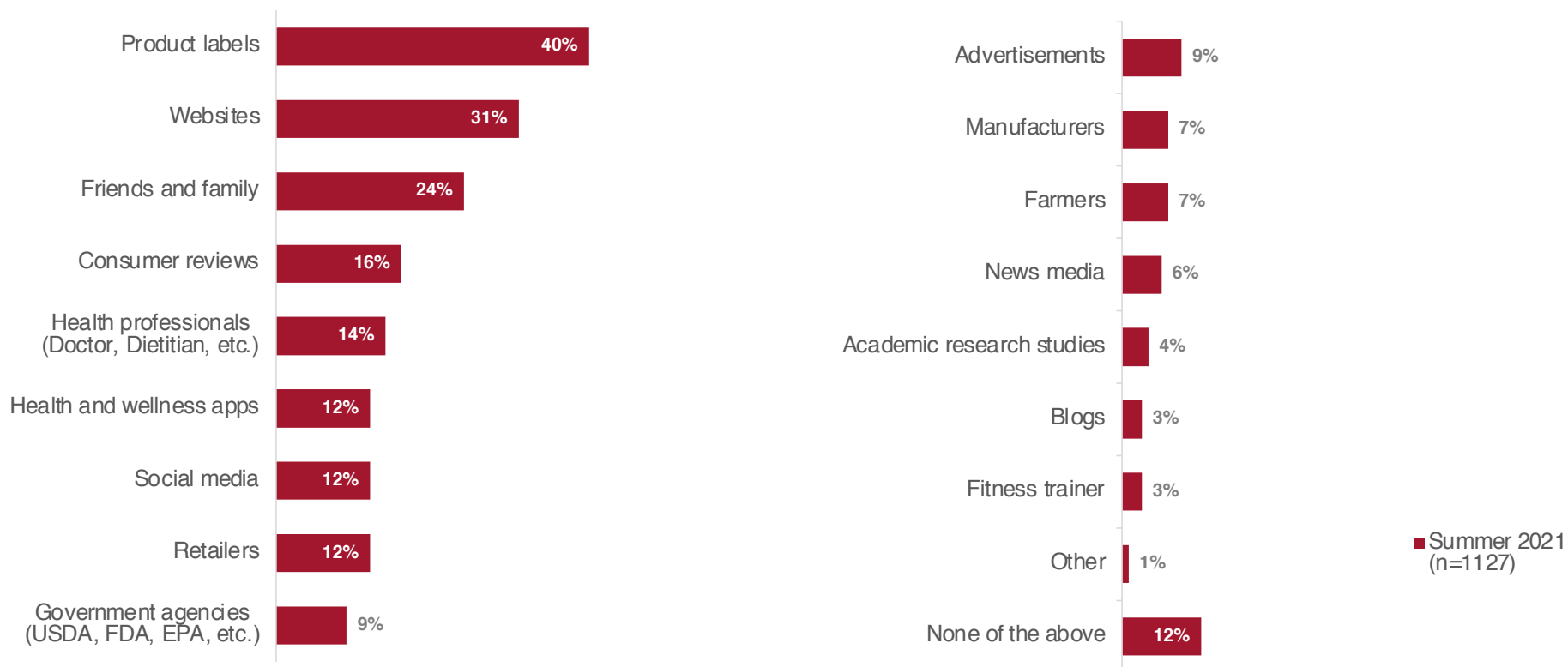
*Answer codes were changed in Summer 2021

*Question was changed from "Select all that apply" to "Select up to 3 items" in Summer 2021



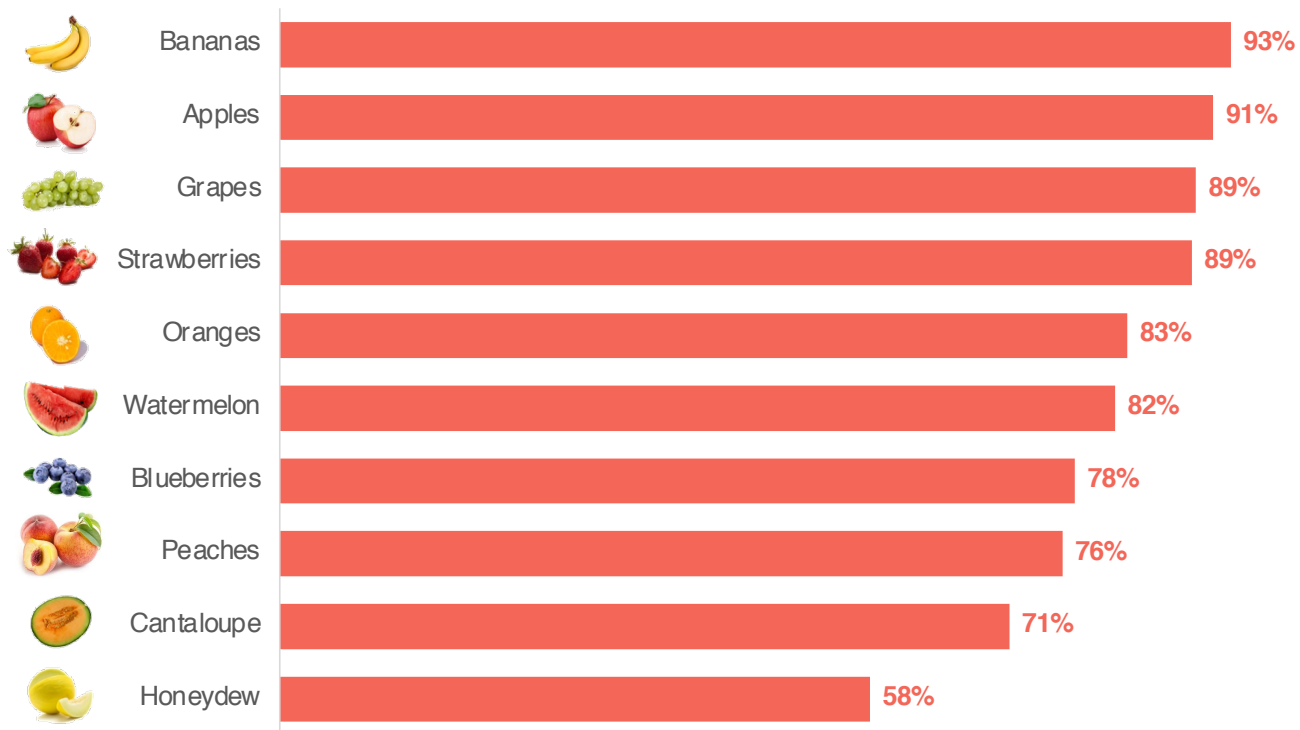
Question changed from
"select all that apply" to
"select up to 3", Summer
2021

Resources Most Referenced for Accurate Information on Foods Consumed



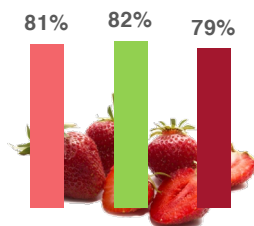
Source: Total Respondents
Where do you most often go for accurate information on the foods you eat? (Select up to 3)

Fruits purchased in past 12 months

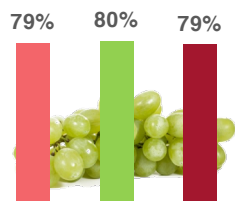


Source: Total Respondents (n=1127)
 For each of the following types of fruit, please indicate where you have primarily purchased it in the past 12 months.

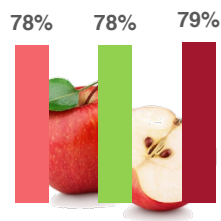
Percent Of People That Like The Taste Of ...



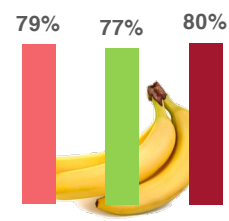
Strawberries



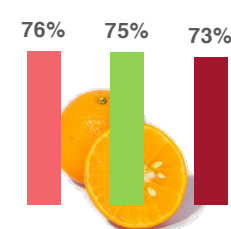
Grapes



Apples



Bananas



Oranges

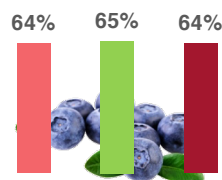
● Summer 2020 (n=1124) ● Winter 2021 (n=1182) ● Summer 2021 (n=1127)



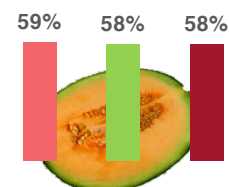
Watermelon



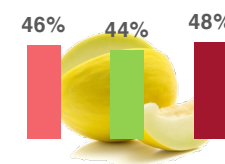
Peaches



Blueberries



Cantaloupes



Honeydews

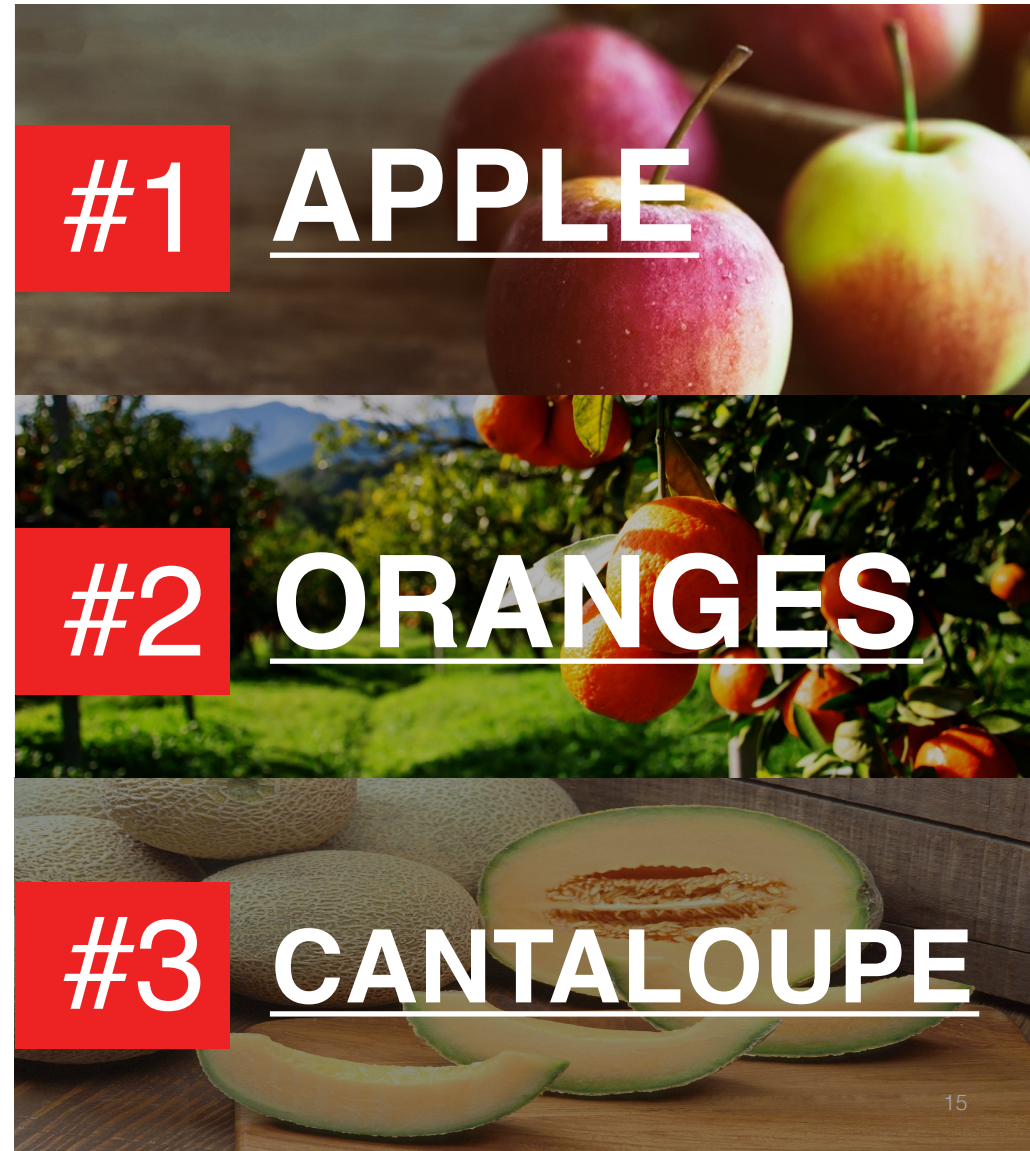
Source: Total Respondents
Please select the fruits you like the taste of? (select all that apply)

Number of fruits that a respondent likes the taste of increases with age from 5.5 to approximately 8.0.

Freshness Rankings - Summer 2021

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

Source: Total Respondents (n=1127)
Please rank the following fruits by how long each will stay fresh before you consume them (1) freshest to least fresh (10).



Aggregated Ratings of Fruits

Fruit	Safe (% generally think)	Value (0 – 10)	Healthy (0 – 10)
Apples	98%	7.9	8.4
Oranges	96%	8.1	8.6
Bananas	96%	8.1	8.4
Watermelon	96%	7.9	8.2
Peaches	94%	7.8	8.2
Strawberries	93%	8.1	8.5
Blueberries	93%	8.0	8.6
Honeydew	92%	7.3	7.8
Grapes	91%	7.8	8.1
Cantaloupe	91%	7.4	8.0

Source: Total Respondents (n=1127)

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."

*Average Produce
Safety Score*

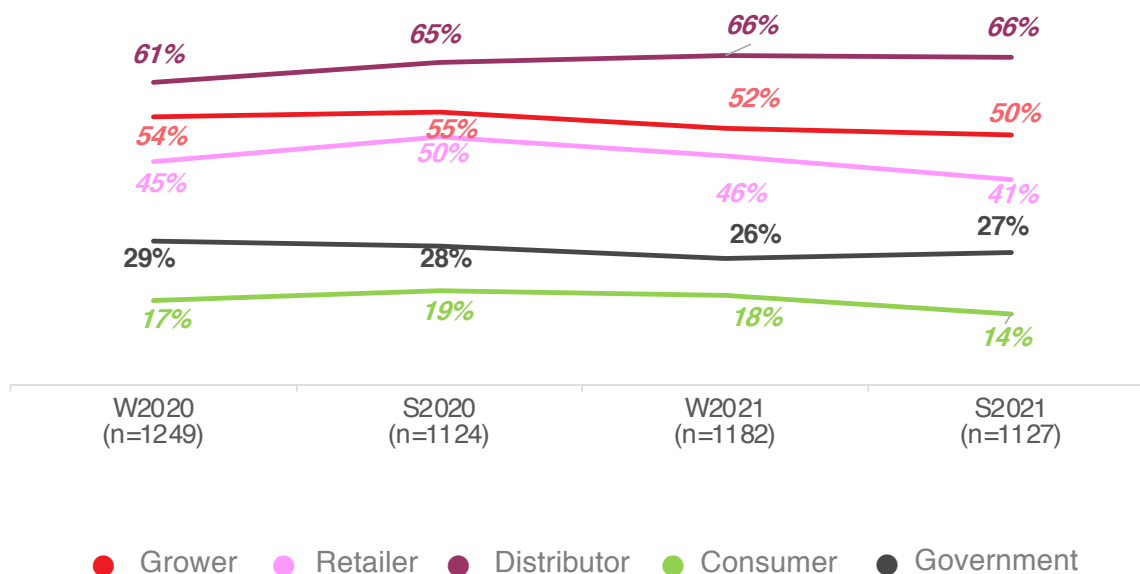
Summer 2020 Winter 2021

7.2 7.3

Summer 2021

7.2

*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)

Primary Place Fruit is Purchased

		GROCERY STORE	CLUB STORE	FARMER'S MARKET	ROADSIDE STAND	CONVENIENCE STORE
	Apples	79%	4%	5%	2%	1%
	Bananas	77%	7%	5%	2%	2%
	Blueberries	58%	5%	10%	3%	2%
	Cantaloupe	53%	3%	10%	4%	2%
	Grapes	72%	6%	6%	3%	3%
	Honeydew	42%	3%	7%	4%	1%
	Oranges	67%	5%	5%	3%	2%
	Peaches	55%	4%	11%	5%	2%
	Strawberries	68%	6%	10%	4%	1%
	Watermelon	61%	5%	10%	4%	1%

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

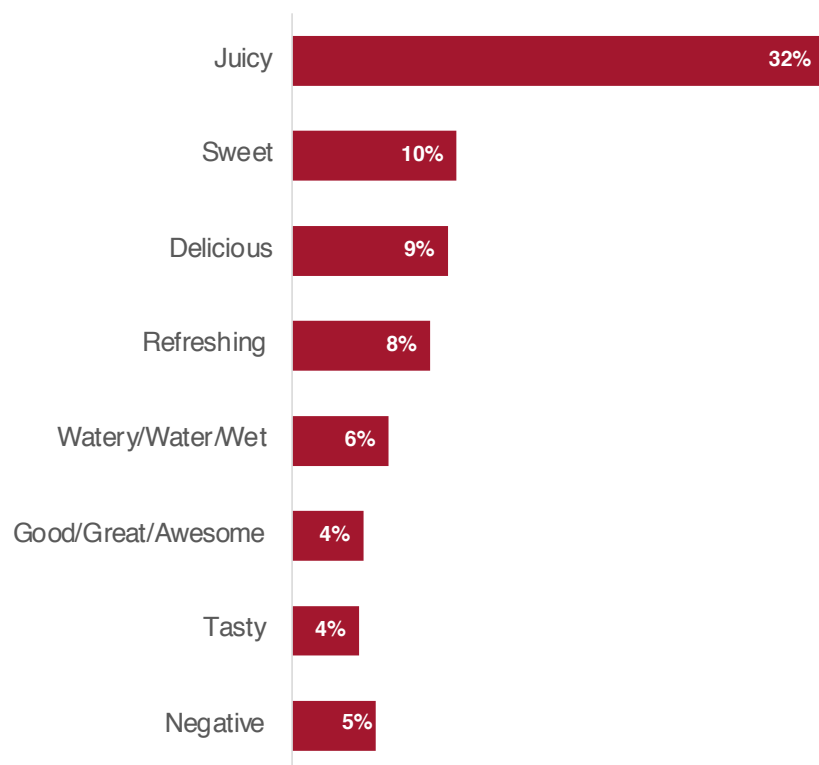
Source: Total Respondents (n=1127)

For each of the following types of fruit, please indicate where you have primarily purchased it in the past 12 months?

A close-up photograph of a person's hands holding a large, triangular slice of watermelon. The watermelon has a thick, vibrant red flesh and a thin green rind. The person is wearing a light blue button-down shirt, which is visible in the background. The background is slightly blurred, focusing attention on the watermelon slice.

WATERMELON ATTITUDES

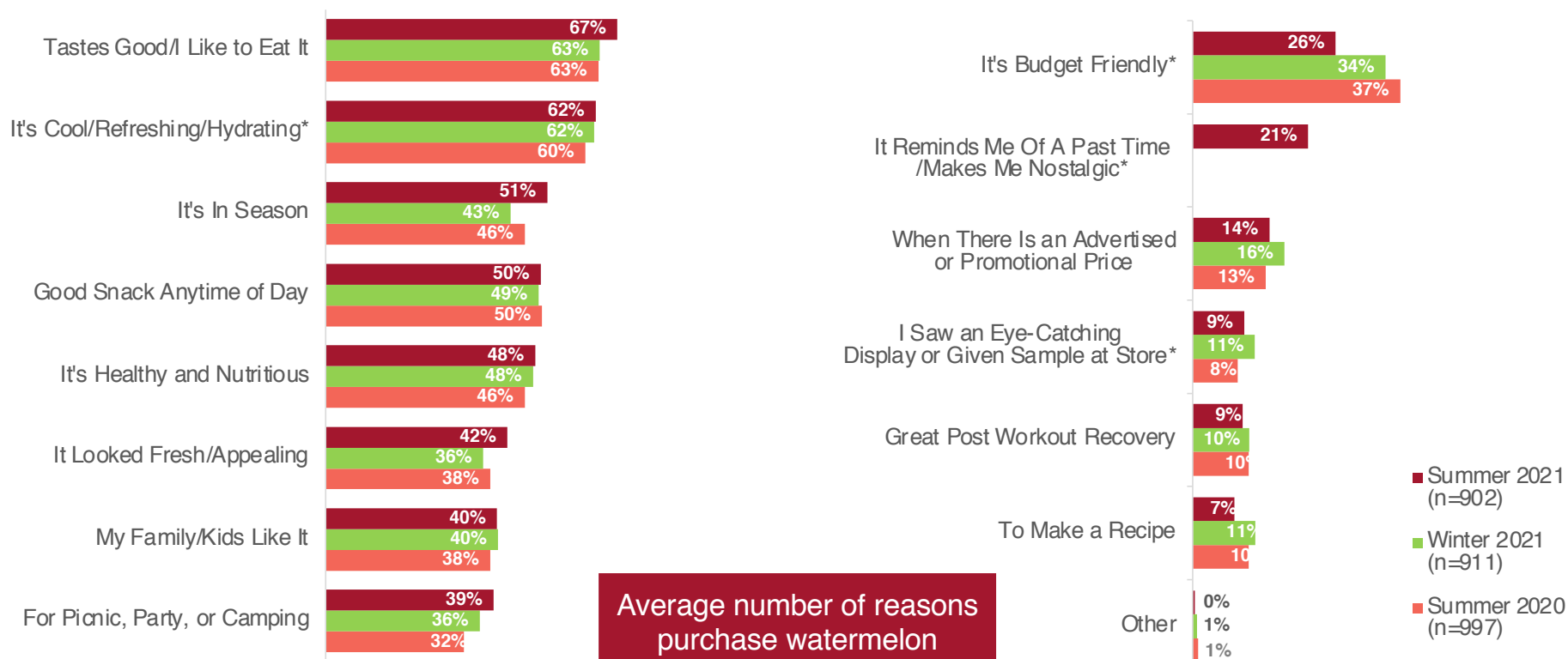
Description Using One Word



Mentioned by 1-2% of respondents:

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

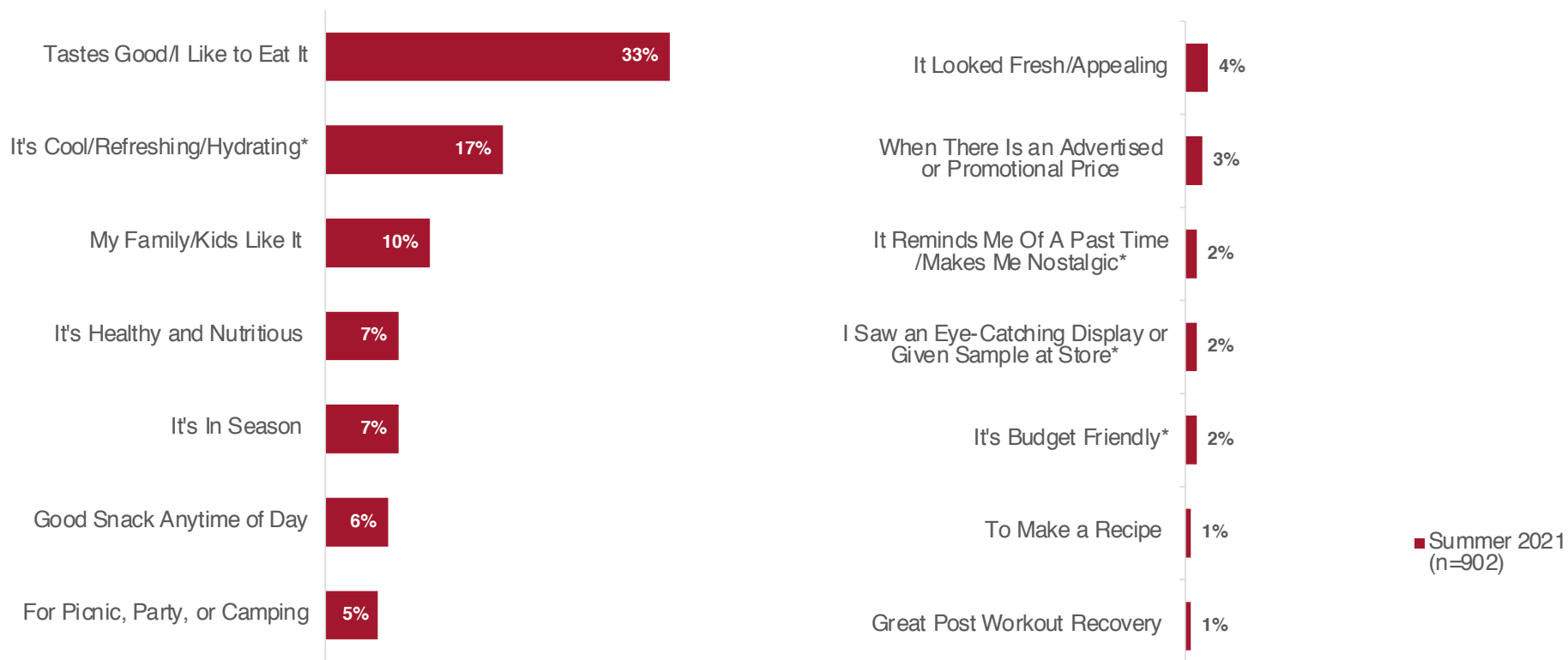
Reasons to Purchase Watermelon



Average number of reasons purchase watermelon increases with age from approximately 4.2 reasons to 5.4 reasons.

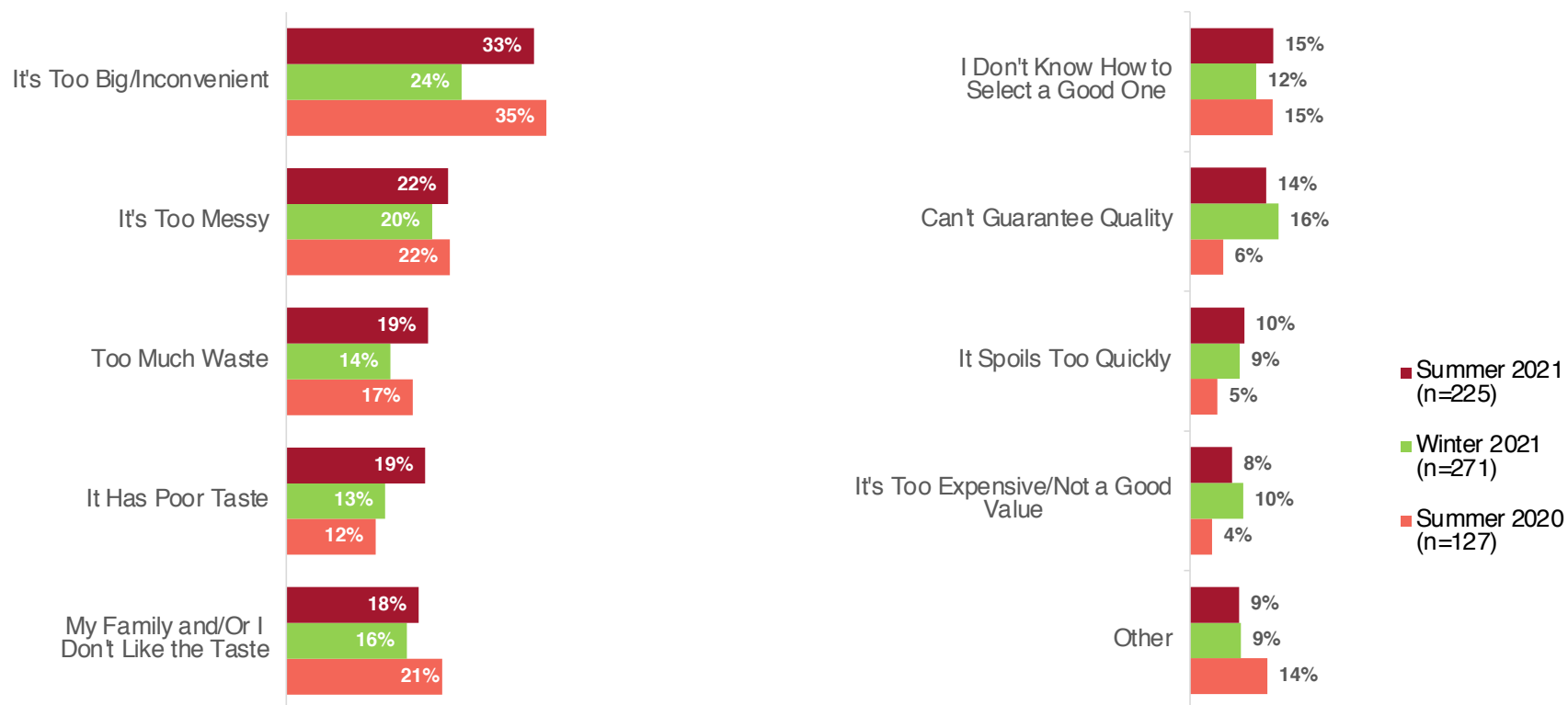
Source: Total Respondents Purchasing Watermelon
 What reasons do you purchase watermelon? (select all that apply)
 *Answer codes were changed in Summer 2021

MAIN Reason to Purchase Watermelon



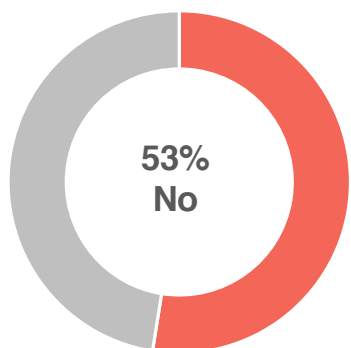
Source: Total Respondents Purchasing Watermelon
 Which of the following reasons is the MAIN reason you purchase watermelon?
 *Answer codes were changed in Summer 2021
 New question for Summer 2021

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



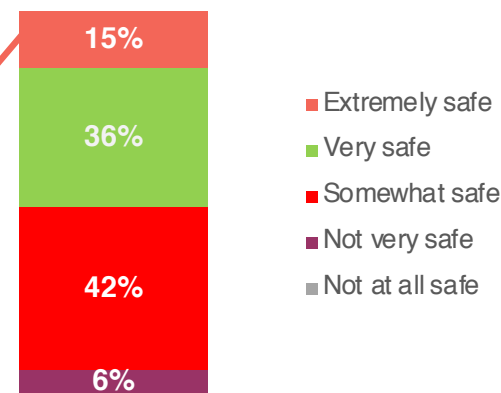
Summer 2021 (n=99)



Reasons won't buy fresh cut watermelon:

- Dislike watermelon/eat other fruits (22)
- Cost (14)
- Cleanliness/safety (4)
- Can't consume/doesn't fit in diet (3)
- Doesn't keep (3)
- Wastes plastic (1)

Safety of Fresh Cut Fruits



Summer 2021
(n=1127)

Extremely + very safe decreases with age from 54% for 18-34 to 43% for 65+

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

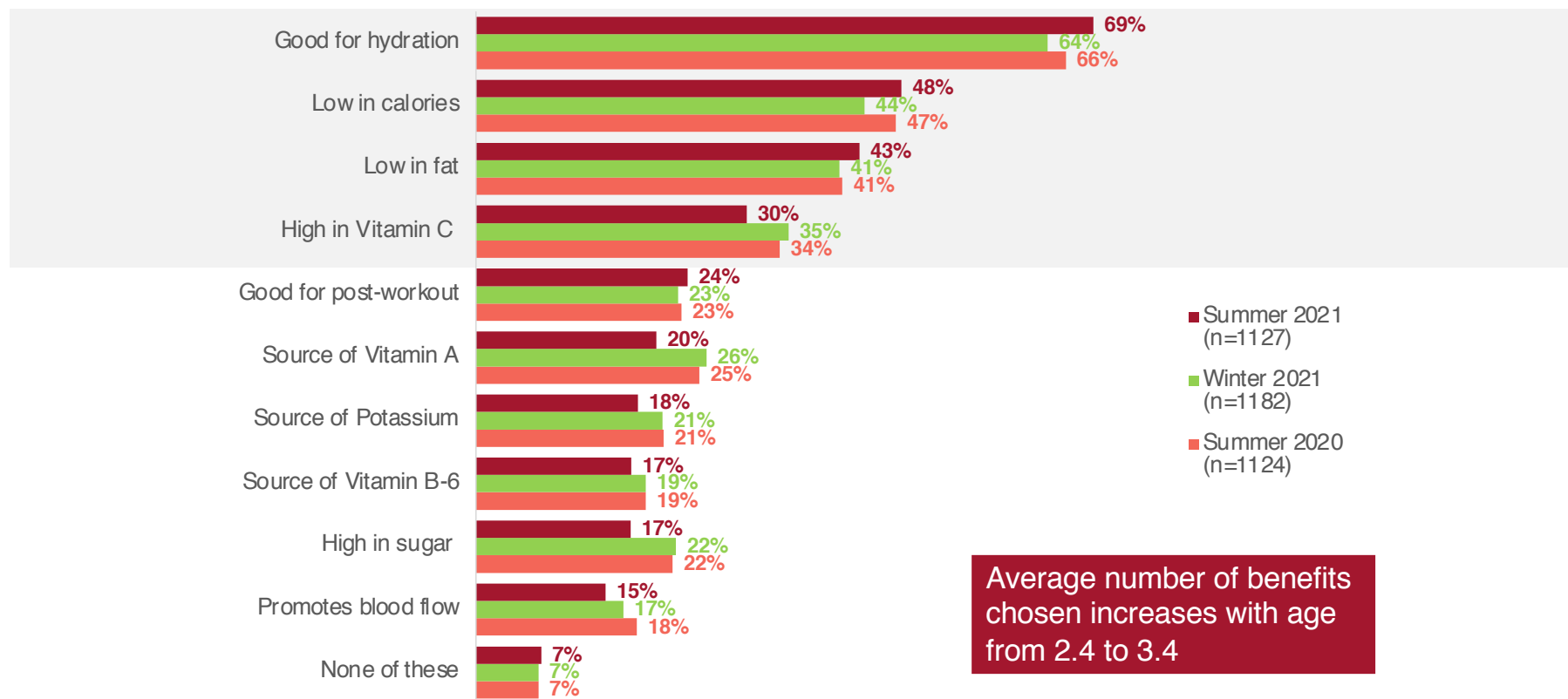
You mentioned you don't buy watermelon because it is messy and/or too big/inconvenient. Would you be willing to spend a bit more for fresh cut, ready to serve watermelon?

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

Source: Total Respondents

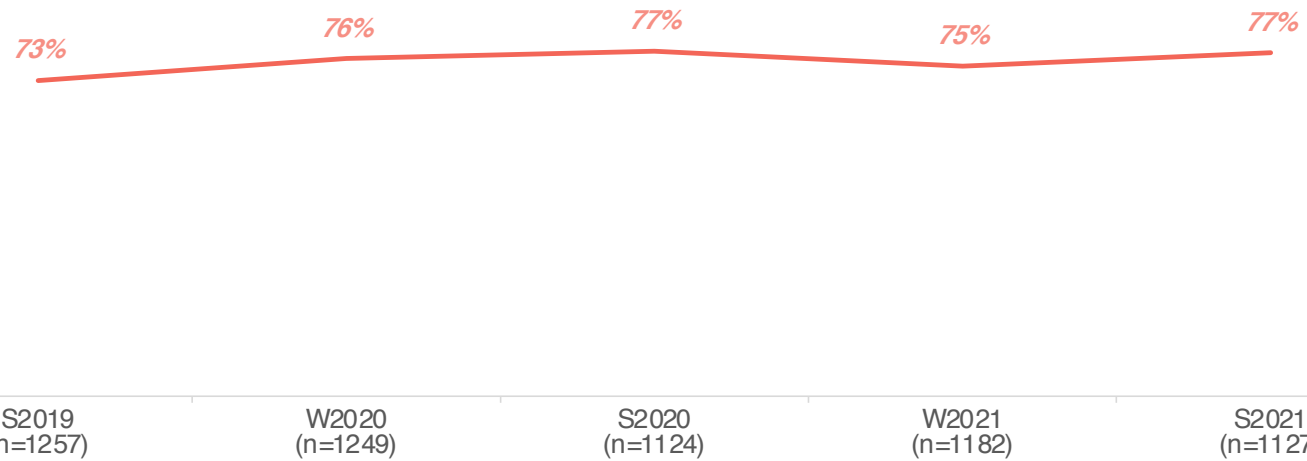
How safe do you feel fresh cut, ready-to-eat fruit is?

Respondents Understanding of the Benefits of Watermelon



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



Decreases with age

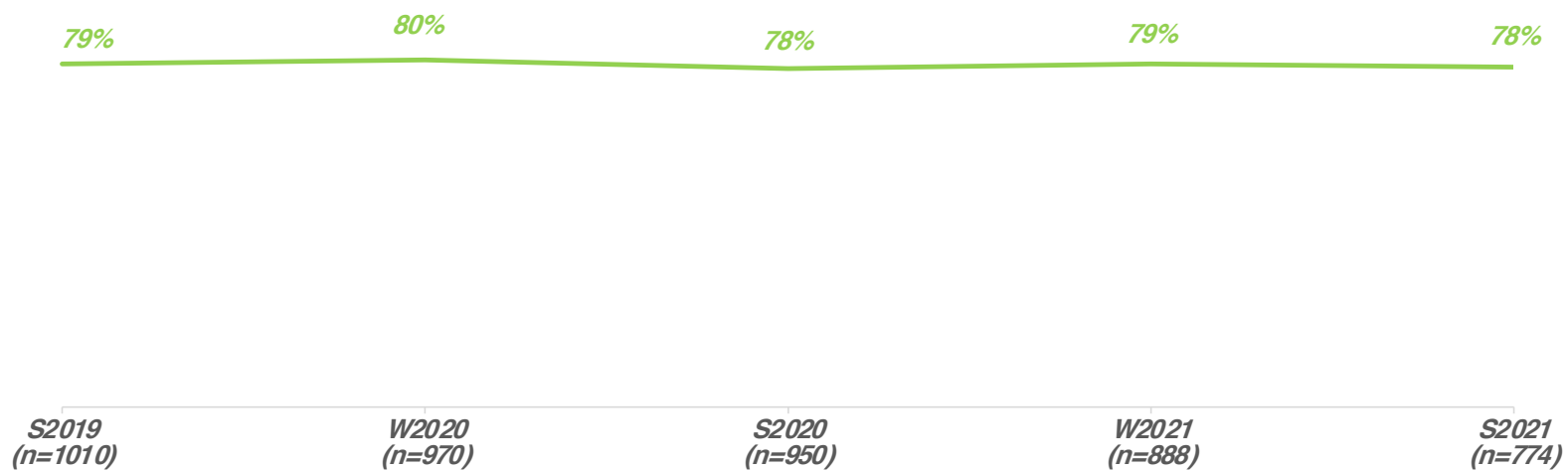
- 18-24 (81%)
- 25-34 (86%)
- 35-44 (84%)
- 45-54 (78%)
- 55-64 (68%)
- 65+ (64%)

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



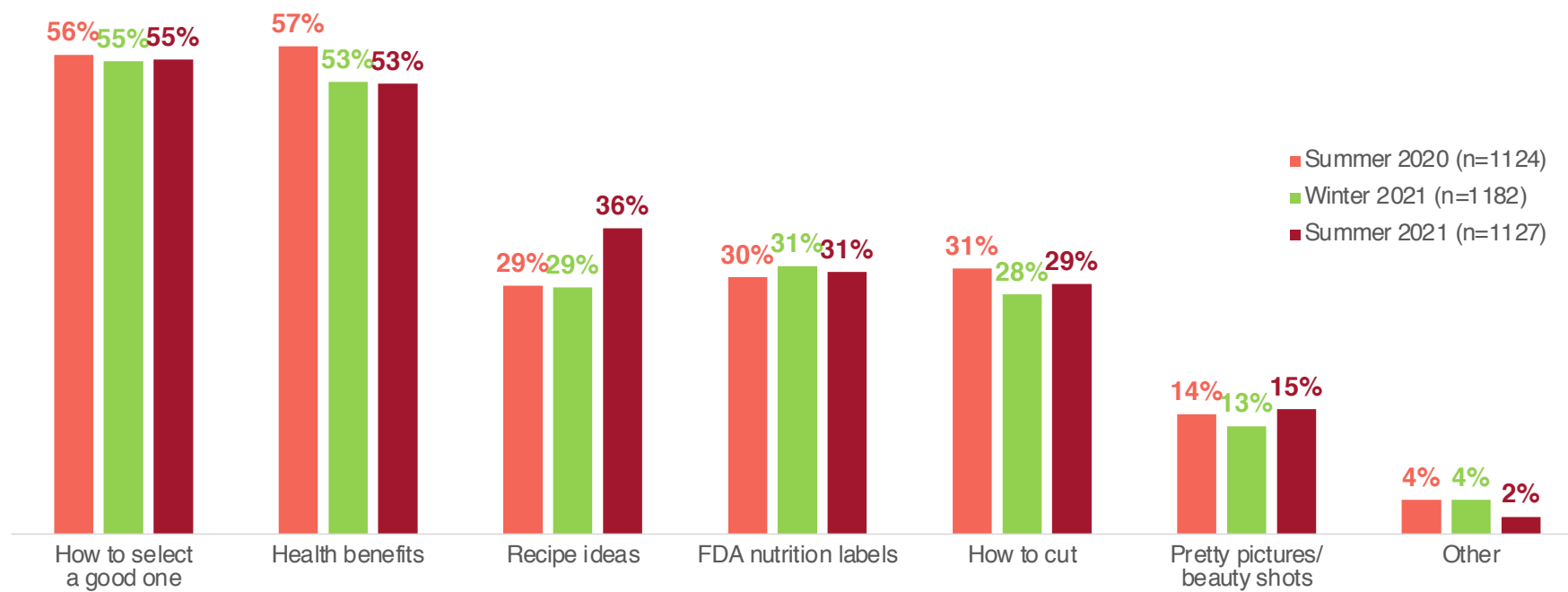
WATERMELON PURCHASING

Percent Saying Yes to Knowing How to Pick a Good Watermelon



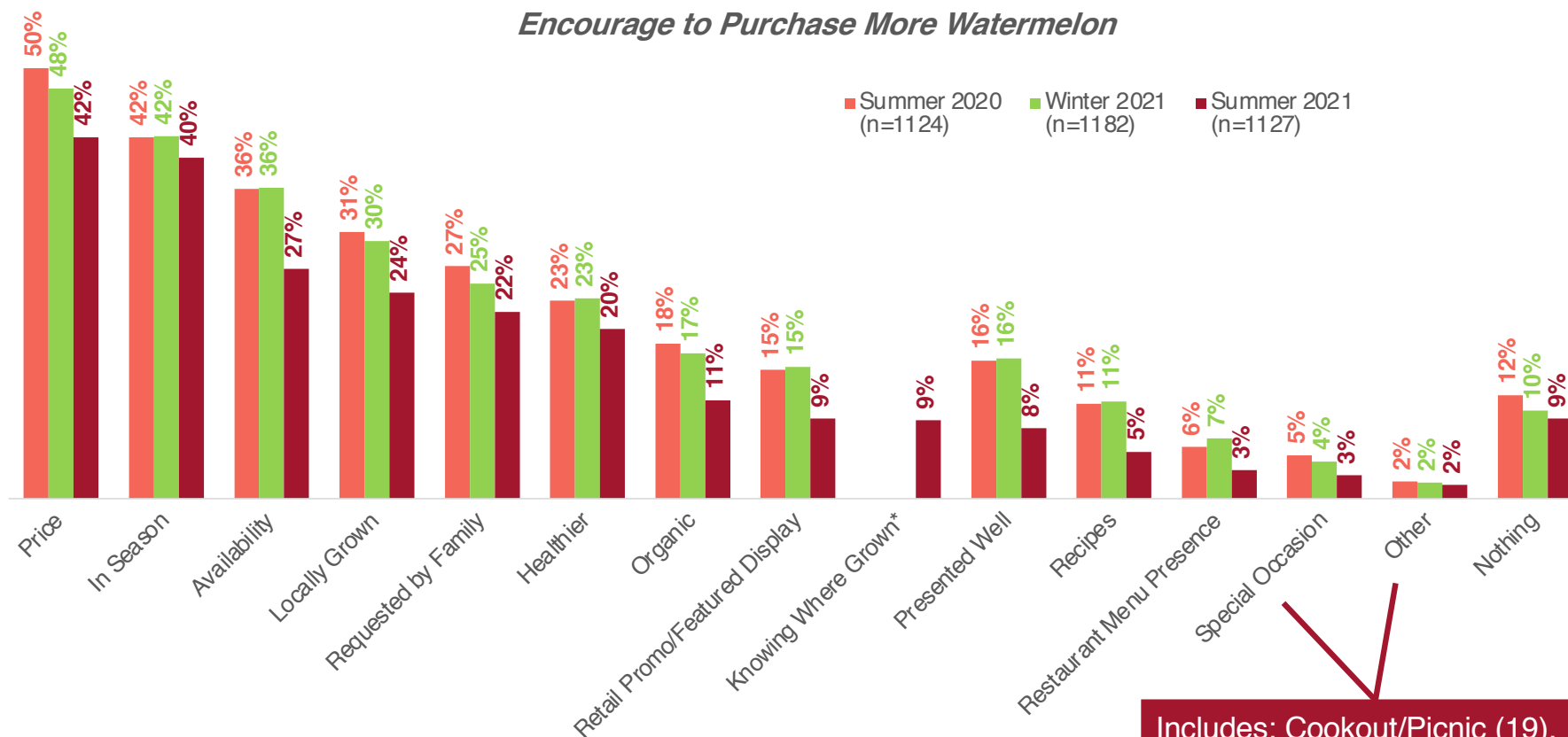
Source: Total Respondents Purchasing Whole/Mini Watermelon
Do you know how to pick out a good watermelon?

Type of Information Would Like to See at Store



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

Encourage to Purchase More Watermelon



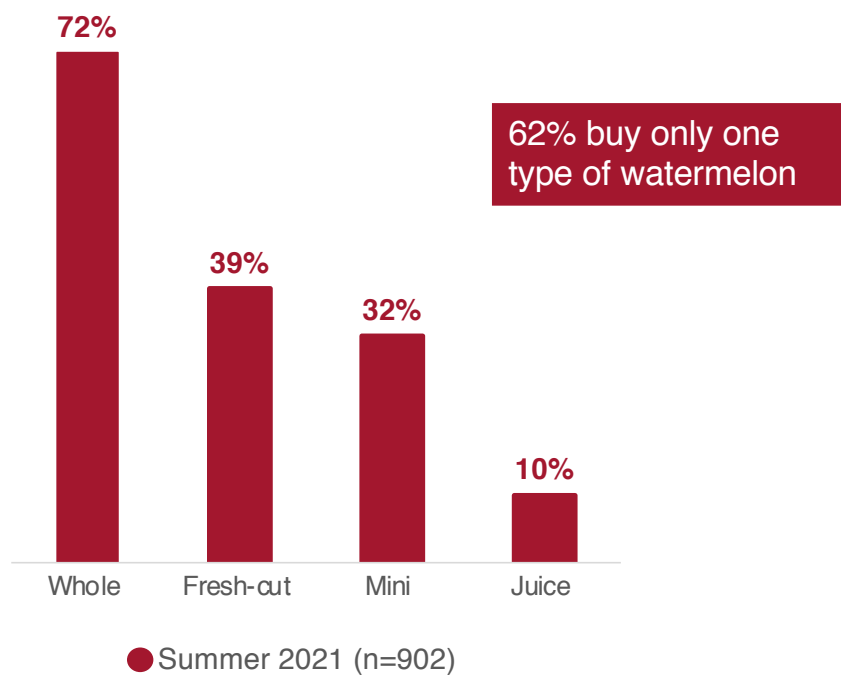
Source: Total Respondents

What might encourage you to purchase (or purchase more) watermelon? (Select up to 3 reasons)

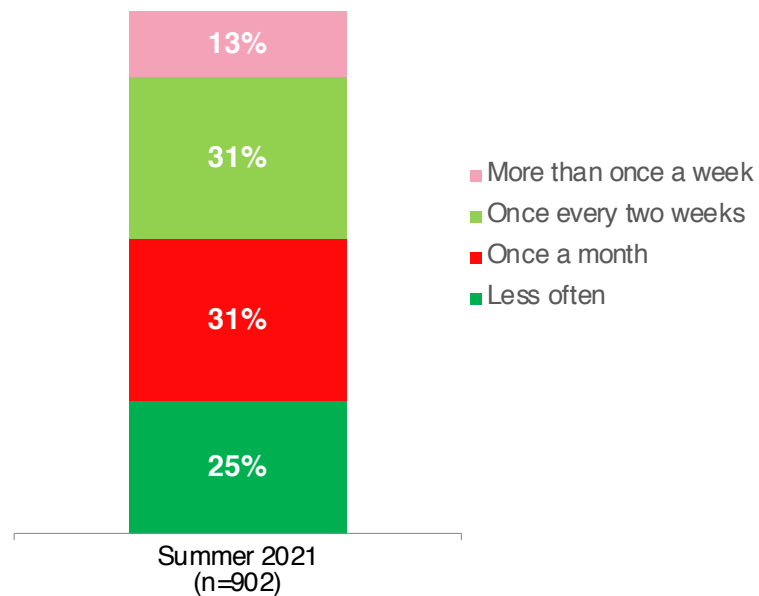
*Answer codes were changed in Summer 2021

*Question was changed from "Select all that apply" to "Select up to 3 items" in Summer 2021

Types of Watermelon Purchased Past 12 months

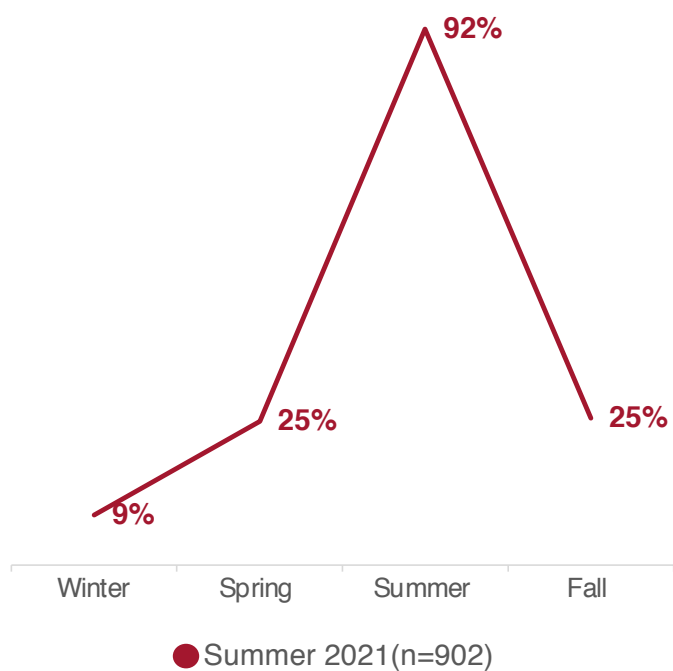


Frequency of Purchasing Watermelon Past 12 months



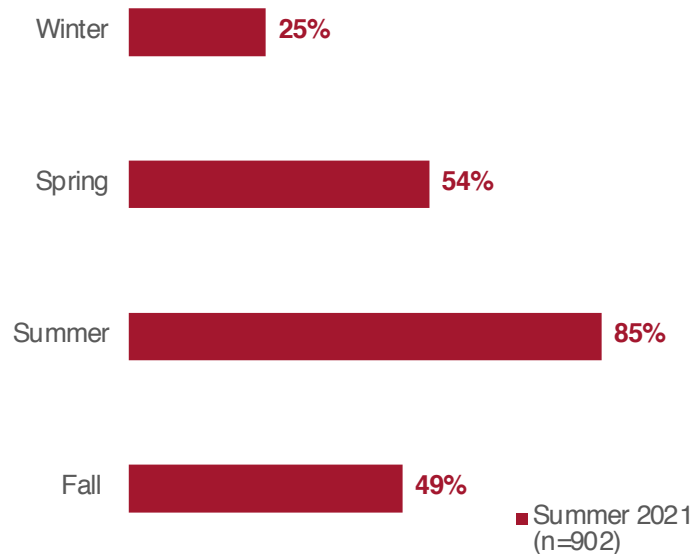
Source: Total Respondents Purchasing Watermelon
Which of the following types of watermelon have you purchased in the past 12 months? (Select all that apply)
In the past 12 months, how often did you purchase any type of watermelon?

Seasons Typically Purchase Watermelon



Likelihood to Purchase by Season

Definitely + Probably Would Buy

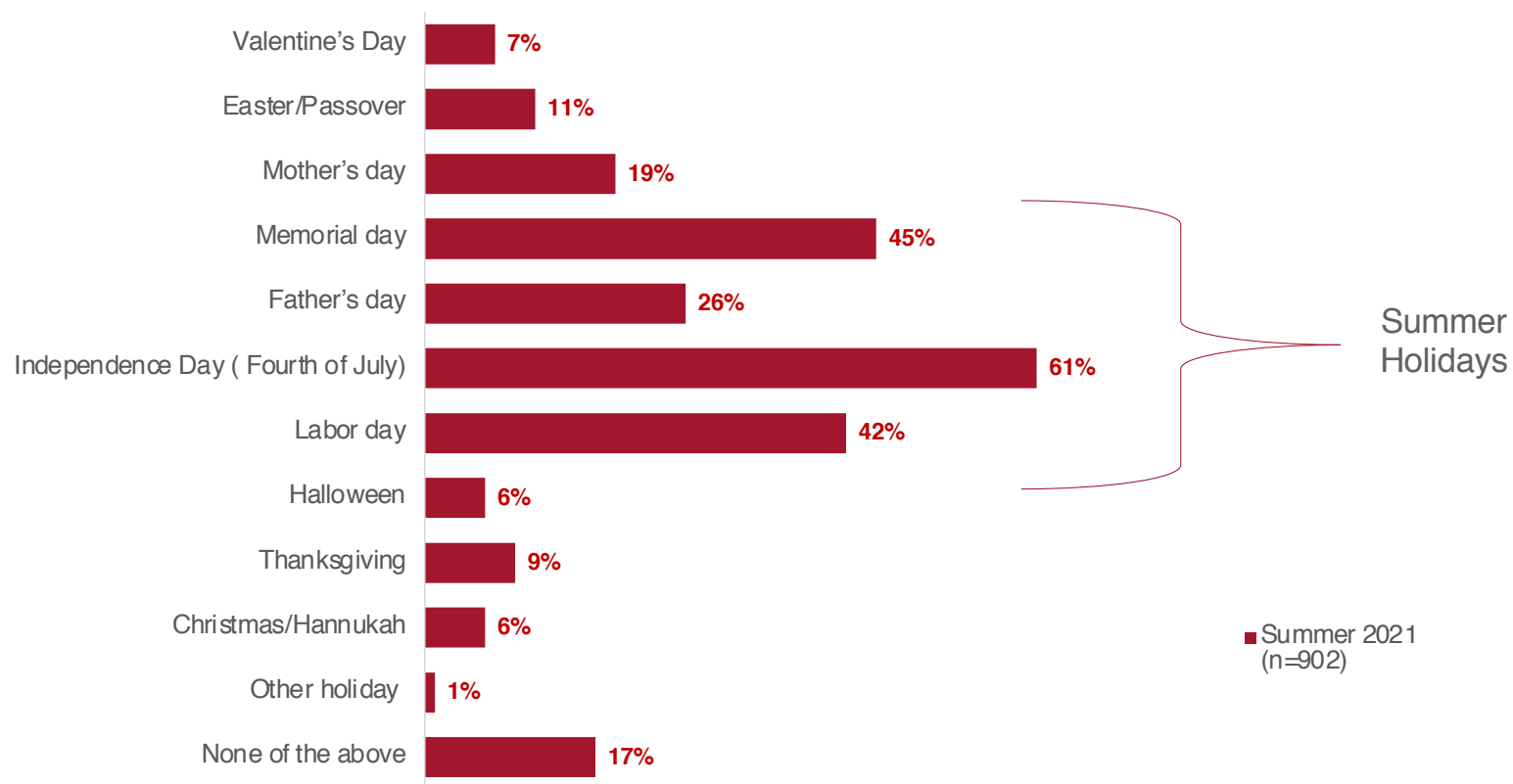


Source: Total Respondents Purchasing Watermelon

In what seasons do you typically purchase any type of watermelon? (Select all that apply)

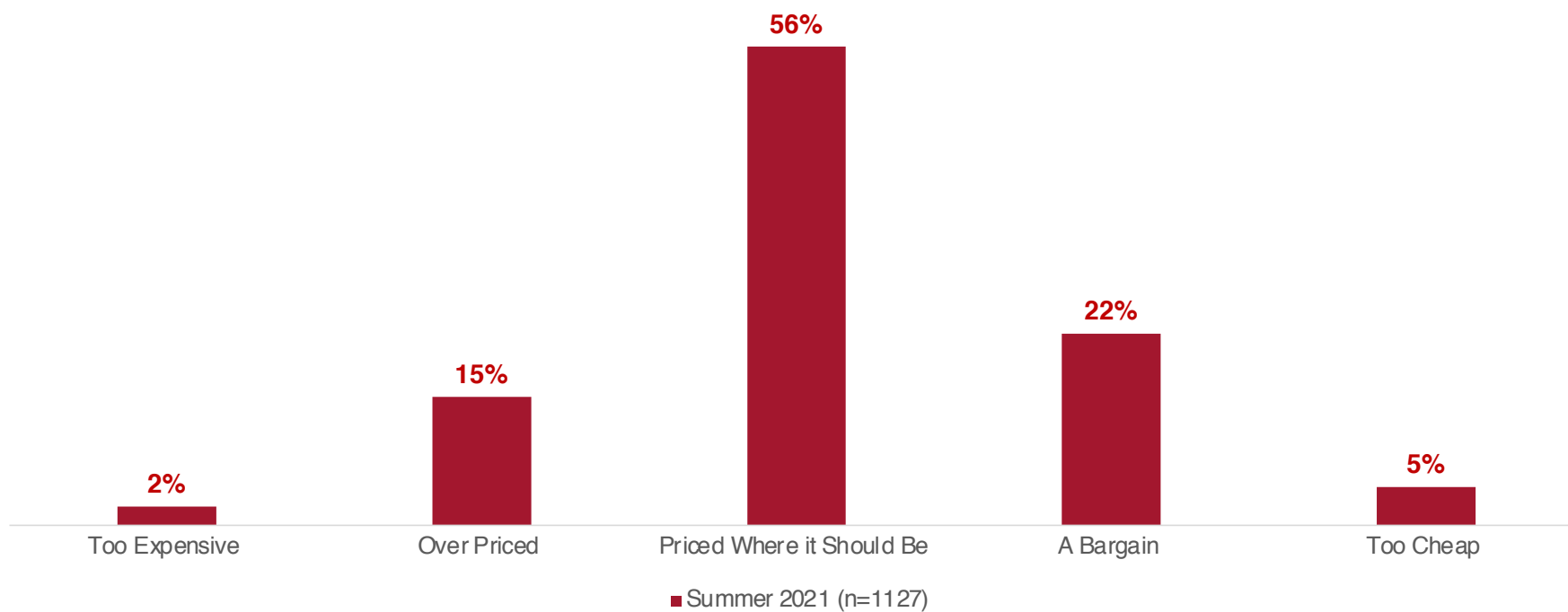
How likely are you to purchase watermelon in each of the following seasons?

Purchased Watermelon For Specific Holidays



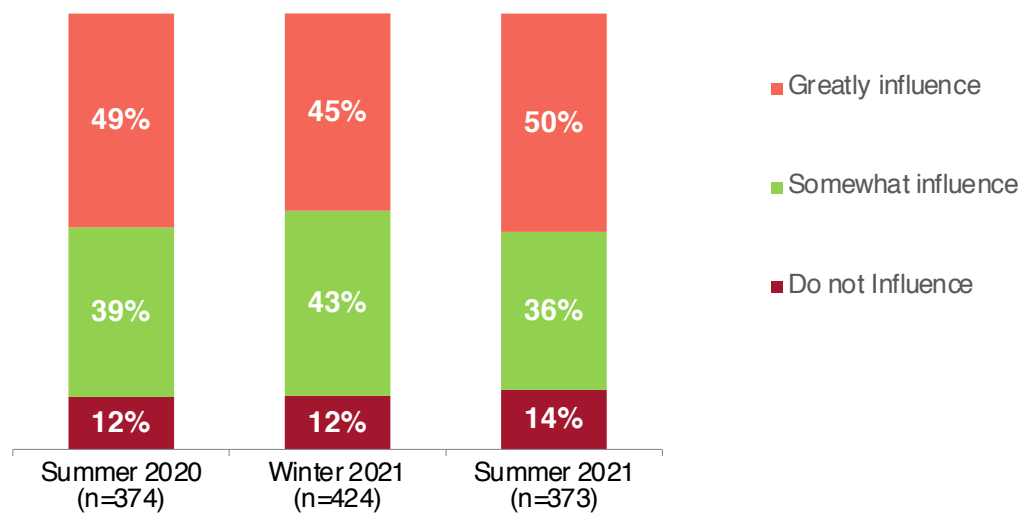
Source: Total Respondents Purchasing Watermelon
Which of the following holidays, if any, have you purchased watermelon for in the past 12 months?

Price and Value of Watermelon Compared to Other Fruit



Source: Total Respondents
Compared to other fruits, which one statement best describes how you feel about the price and value of watermelon?

Influence Children Have on Watermelon Purchases



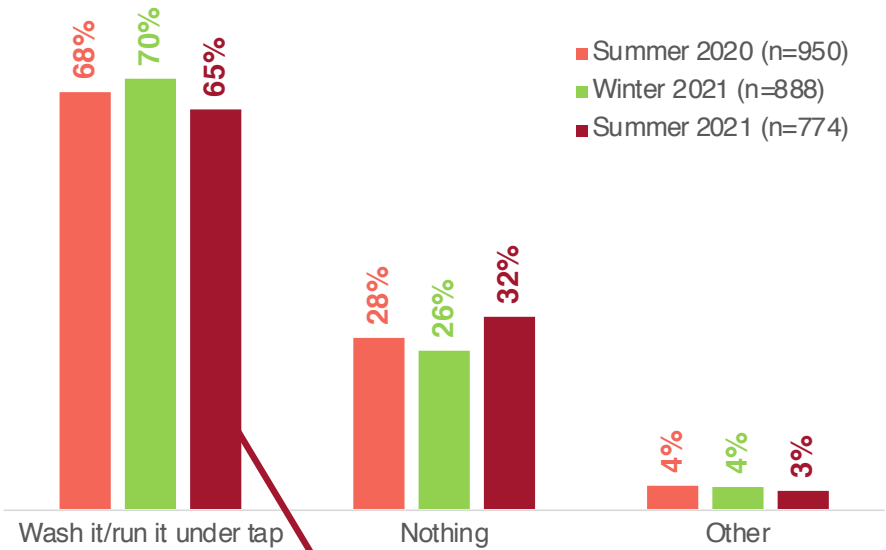
Source: Total Respondents with Children
How much do your children influence your watermelon purchases?

WATERMELON CONSUMPTION





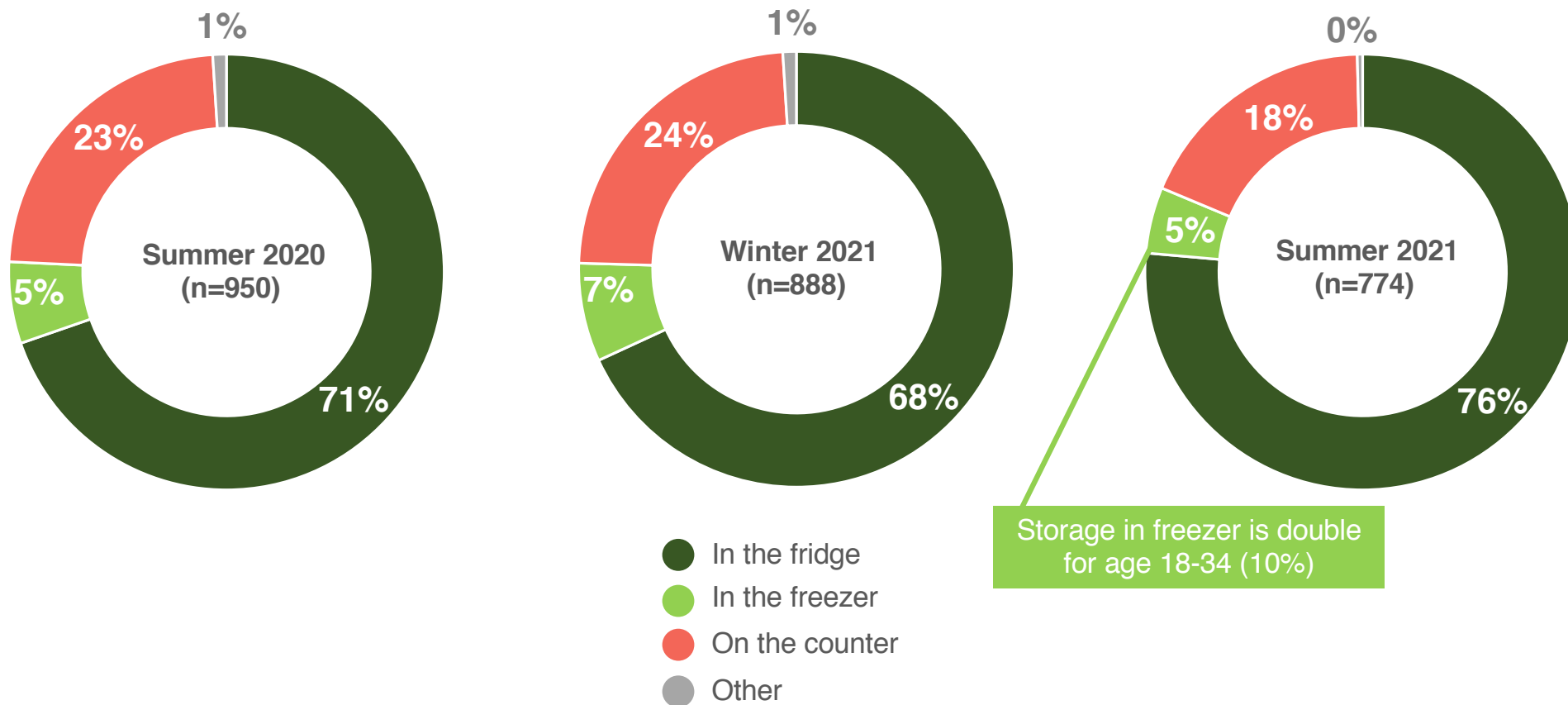
How Watermelon is Being Handled Before Consumption



Washing/running under tap decreases with age from 76% for 18-24 to 54% for 55+

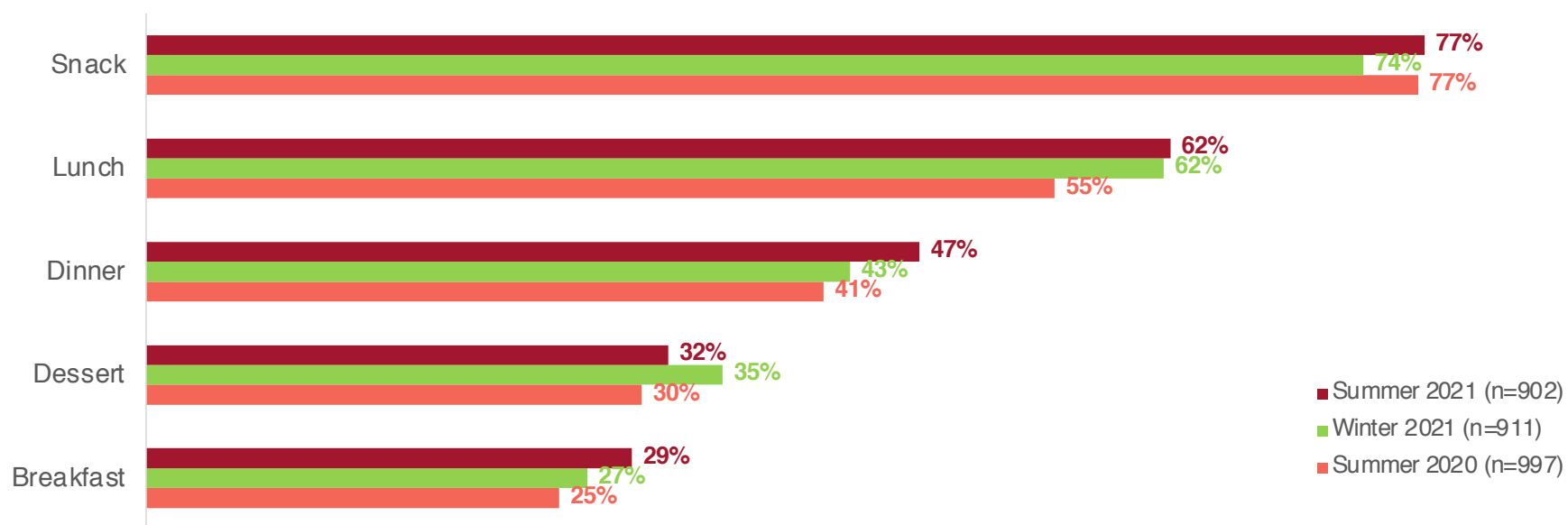
Source: Total Respondents Purchasing Whole/Mini Watermelon
What do you do with your whole watermelon before you consume it?

Storage of Whole Watermelon



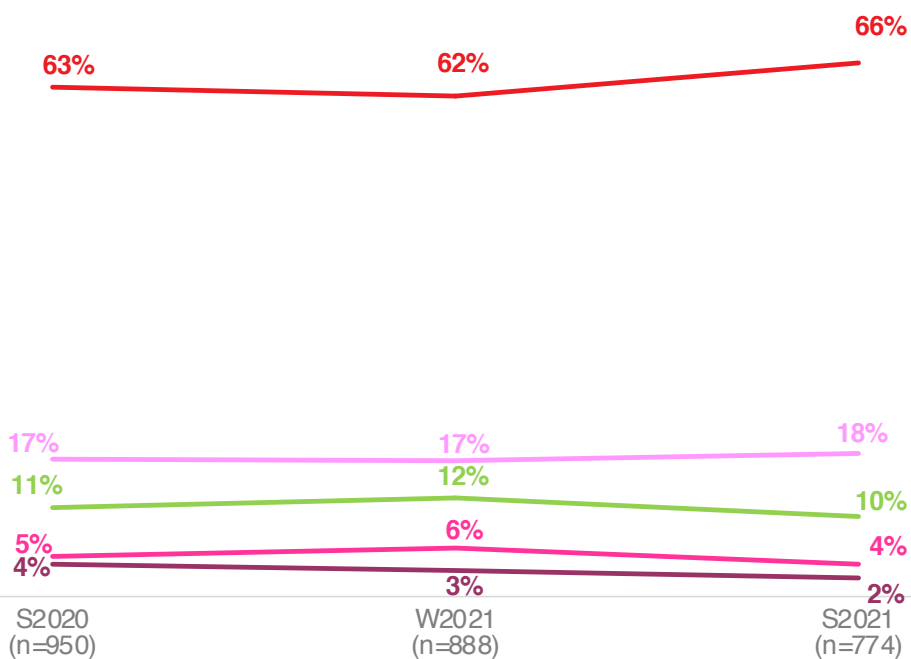
Source: Total Respondents Purchasing Whole/Mini Watermelon
How do you store your whole watermelon?

Time of Day Watermelon is Eaten

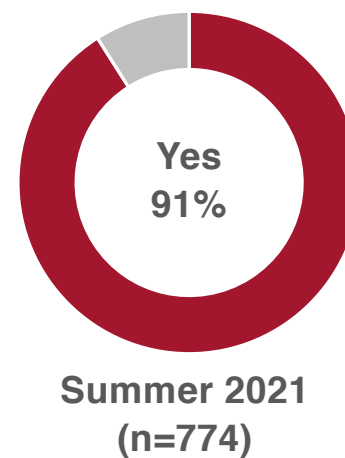


Source: Total Respondents Purchasing Watermelon
When during the day do you eat watermelon? (select all that apply)

Percentage of Watermelon Going to Waste



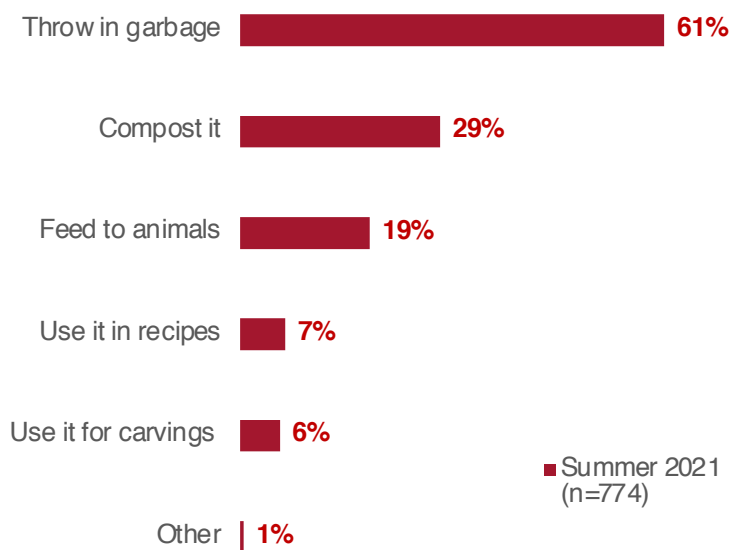
Know How to Cut a Whole Watermelon



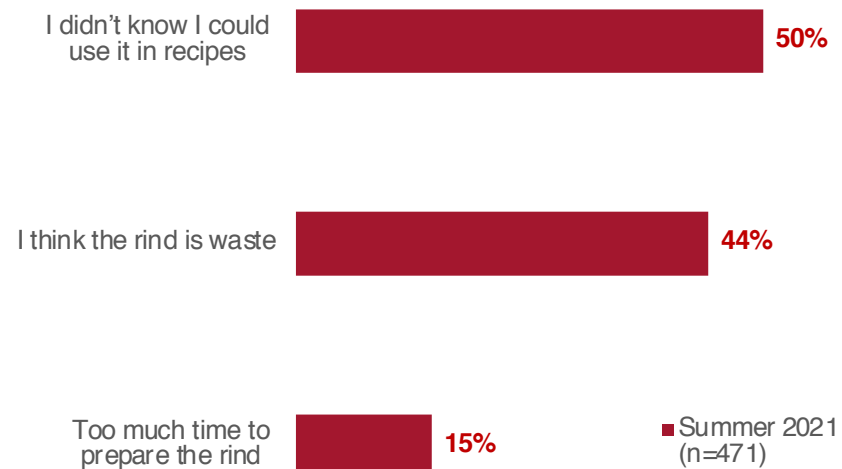
- Just the rind
- None, we use it all
- Use 25%
- Use 50%
- 75% or more

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?

Use of Rind

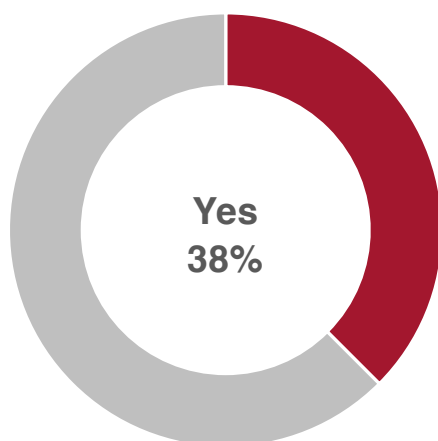


Reasons Not Use Rind



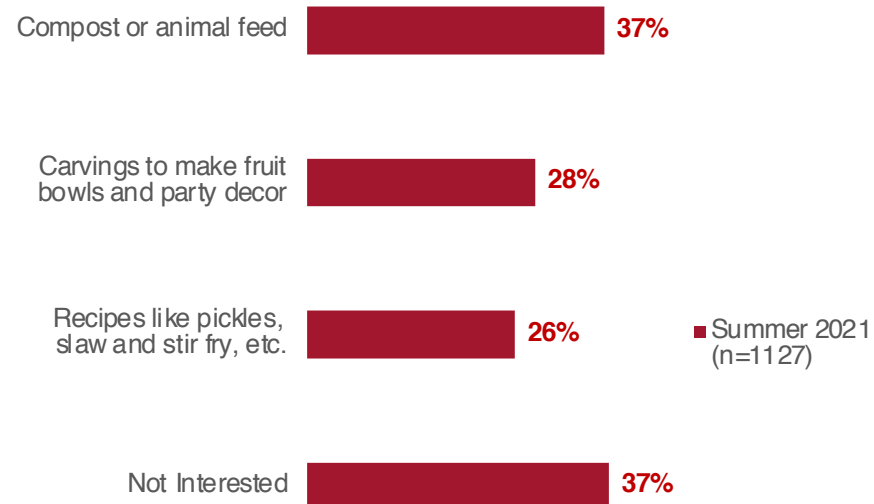
Source: Total Respondents Purchasing Whole or Mini Watermelon
 What do you do with the rind? (Select all that apply)
 Source: Total Respondents Who Throw The Rind In The Garbage
 Of the following reasons, which best describes why you don't use the watermelon rind?

Know the Rind is Edible



**Summer 2021
(n=1127)**

Interest in Using Watermelon Rind For

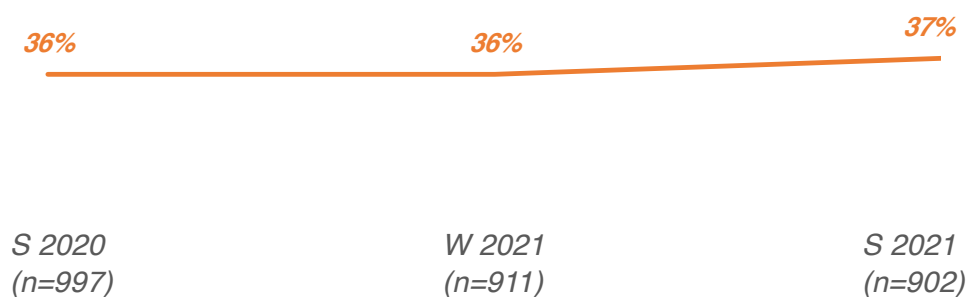


Source: Total Respondents

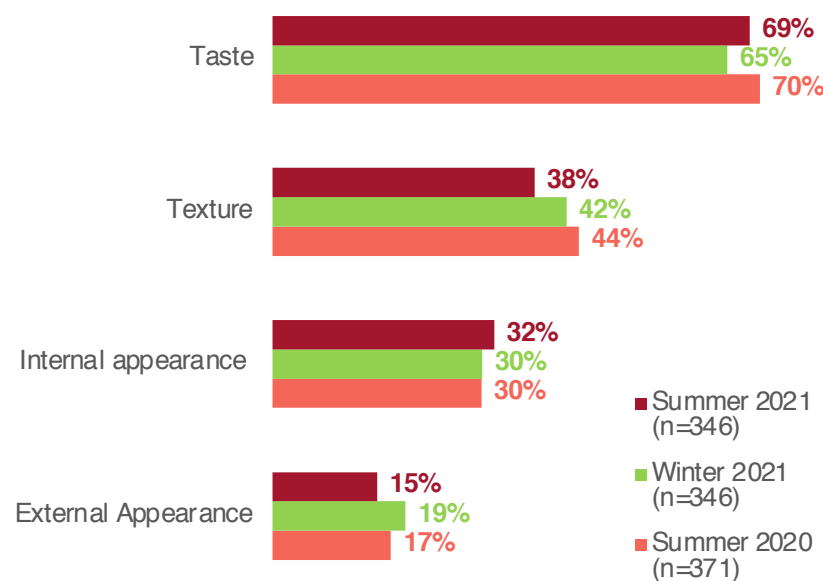
Did you know that watermelon rind is edible?

Which of the following, if any, would you be interested in using watermelon rind for? (Select all that apply)

Percent Indicating Quality Issues with Watermelon Purchase



Issues with Watermelon Quality



Those age 18-34 have more external appearance quality issues (25%) while those age 65+ have more internal appearance issues (46%)

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?

Consumption by Percentage of Time

Summer 2021
(n=902)

87%
Plain watermelon

13%
In a recipe

Winter 2021
(n=911)

85%
Plain watermelon

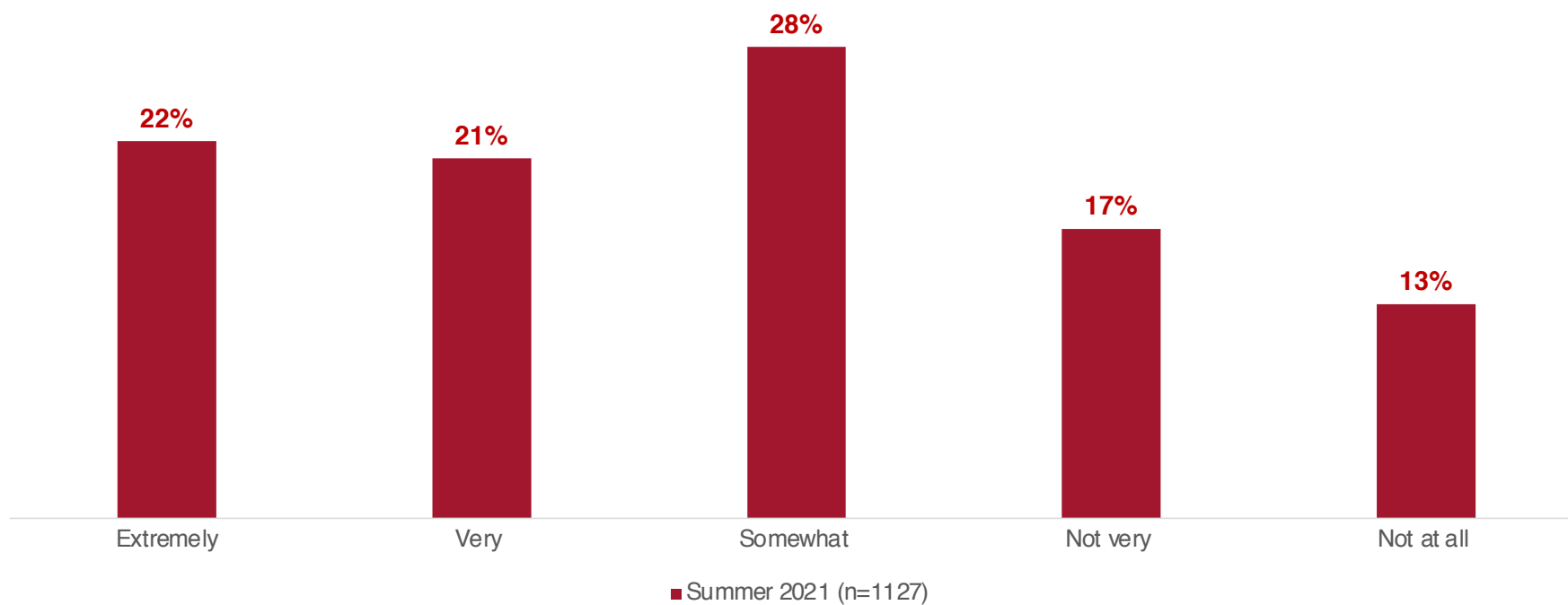
15%
In a recipe

Summer 2020
(n=997)

86%
Plain watermelon

14%
In a recipe

Likelihood to Try New Recipes With Watermelon



Source: Total Respondents
How likely are you to try a new recipe that includes watermelon as an ingredient?

Location of Consumption by Percentage of Time

Summer 2021
(n=902)

76%
In my home

17%
Outside my home

7%
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

Summer 2020
(n=997)

77%
In my home











15%
Outside my home

8%
Restaurant or other food
service location



DIFFERENCES BY AGE

Percent Of People That Like The Taste Of...





		18-24	25-34	35-44	45-54	55-64	65+	Total
	Bananas	64%	74%	78%	81%	93%	88%	80%
	Apples	69%	79%	83%	80%	79%	80%	79%
	Grapes	69%	75%	78%	81%	85%	82%	79%
	Strawberries	69%	68%	80%	83%	89%	85%	79%
	Oranges	60%	70%	71%	72%	86%	79%	73%
	Watermelon	55%	60%	66%	75%	81%	80%	70%
	Peaches	53%	62%	63%	68%	84%	80%	69%
	Blueberries	53%	59%	62%	68%	68%	72%	64%
	Cantaloupe	34%	48%	50%	60%	77%	78%	58%
	Honeydew	27%	32%	43%	52%	67%	63%	48%

Source: Total Respondents (n=1127)

Please select the fruits you like the taste of? (select all that apply)

Red highlighting is 5 percentage points or more below total and green highlighting is 5 percentage points or more above total

Types of Watermelon Purchased In The Past 12 Months

		18-24	25-34	35-44	45-54	55-64	65+	Total
	Whole	68%	73%	83%	76%	68%	60%	72%
	Fresh cut	35%	41%	43%	39%	34%	40%	39%
	Mini	26%	35%	33%	32%	30%	33%	32%
	Juice	9%	14%	15%	7%	7%	3%	10%

Source: Total Respondents Purchasing Watermelon (n=902)

Which of the following types of watermelon have you purchased in the past 12 months? (Select all that apply)

Red highlighting is 5 percentage points or more below total and green highlighting is 5 percentage points or more above total

Location of Consumption by Percentage of Time

	18-24	25-34	35-44	45-54	55-64	65+	Total
In your home	62%	67%	73%	77%	83%	91%	76%
Outside your home	21%	22%	19%	19%	16%	8%	17%
In a restaurant	18%	11%	8%	4%	2%	1%	7%

Source: Total Respondents Purchasing Watermelon (n=902)

Where do you consume watermelon as a percentage of time? (Percentages must add up to 100%)

Red highlighting is 5 percentage points or more below total and green highlighting is 5 percentage points or more above total

Key Metrics for Total Respondents by Age

		18-24	25-34	35-44	45-54	55-64	65+	Total
True statements about watermelon	Good for hydration	55%	58%	65%	77%	74%	82%	69%
	High in vitamin C	22%	24%	34%	30%	34%	35%	30%
Types of information displayed	How to select a good one	43%	51%	53%	54%	60%	67%	55%
Percent that like the taste of...	Watermelon	55%	60%	66%	75%	81%	80%	70%

Source: Total Respondents (n=1127)

Which of the following statements do you know to be true about watermelon? (select all that apply)

What type of information would you like to see displayed with watermelon at the retail store? (select all that apply)

Please select the fruits you like the taste of? (select all that apply)

Red highlighting is 5 percentage points or more below total and green highlighting is 5 percentage points or more above total

Key Metrics for Respondents Purchasing Watermelon by Age

		18-24	25-34	35-44	45-54	55-64	65+	Total
Reasons to purchase watermelon	Tastes good/ I like to eat it	50%	58%	63%	71%	77%	85%	67%
	Cool/Refreshing/ Hydrating	50%	49%	56%	69%	66%	83%	62%
	In Season	34%	38%	48%	54%	66%	68%	51%
	Family/Kids Like It	43%	38%	48%	44%	36%	27%	40%
	Ad or Promo	9%	12%	14%	12%	12%	21%	14%

Source: Total Respondents Purchasing Watermelon (n=902)

What reasons do you purchase watermelon? (select all that apply)

Red highlighting is 5 percentage points or more below total and green highlighting is 5 percentage points or more above total

Key Metrics for Respondents Purchasing Watermelon by Age

		18-24	25-34	35-44	45-54	55-64	65+	Total
Seasons purchased	Summer	76%	88%	94%	95%	99%	98%	92%
	Winter	16%	11%	9%	8%	5%	4%	9%
Consumption by percentage of time	Plain	76%	81%	84%	92%	94%	97%	87%
	In a recipe	24%	19%	16%	8%	6%	3%	13%

Source: Total Respondents Purchasing Watermelon (n=902)

In what seasons do you typically purchase any type of watermelon? (Select all that apply)

How do you prepare watermelon for consumption as a percentage of time? (Percentages must add up to 100%)

Red highlighting is 5 percentage points or more below total and green highlighting is 5 percentage points or more above total

A watermelon is carved into a turtle shape on a wooden cutting board. The watermelon's green rind is cut into a grid pattern to form the turtle's shell. The red flesh is visible through the cuts. Several triangular slices of watermelon are scattered in front of the turtle. The background is a light-colored, textured surface.

SURVEY KEY FINDINGS

Survey Key Findings

- Watermelon outperforms other melons (cantaloupe and honeydew) on purchase, taste, value, and healthiness. However, consumers like the taste more and purchase apples, bananas, grapes, and strawberries more frequently than watermelon.
- Liking the taste is always a key driver of foods purchased and taste ratings for watermelon are trending down.
 - Taste is the most common reason why consumers purchase watermelon.
 - Not liking the taste is also one of the most common reasons why consumers do not purchase watermelon.
 - Taste is the most commonly reported quality issue with watermelon.
- Most respondents believe that watermelon is priced where it should be with only 17% saying that watermelon is overpriced or too expensive compared to other fruits.
 - When compared to other fruits on value, watermelon is tied for 5th behind, oranges, bananas, strawberries, and blueberries.
- Watermelon consumption is being driven down by being too big/inconvenient, messy and the perceived waste.

Survey Key Findings

- 61% of consumers primarily purchase their watermelon in a grocery store.
 - Locally grown foods along with foods that can be used in multiple recipes and meals are important to consumers.
 - Over half of consumers have ever used grocery pick-up/delivery, with 76% of those people saying they will continue to use it in the future.
 - There is declining trust amongst consumers in those who select their produce for grocery delivery/pick-up.
 - Consumers desire additional information displayed with watermelon in retail stores.
 - While most consumers who purchase say that they know how to pick a good watermelon, most consumers would still like information on how to pick a good one on a display in stores.
 - Consumers are also interested in health benefits, but there has also been a slight uptick in consumers interest in recipe ideas, a possible trend to follow in the future.

Survey Key Findings

- We see a clear age segmentation in several areas.
 - Younger age groups are less likely to like the taste of watermelon (and fruit in general).
 - Younger ages are more likely to consume watermelon in a recipe while older ages are more likely to consume watermelon plain.
 - Among those aged 18-44 there is a disconnect between what they perceive about watermelon health benefits, specifically hydration, and what would encourage a future purchase.
 - Ages 18-44 have a higher propensity for healthy and organic watermelon.
 - Younger respondents are more likely to experience external quality issues while older respondents are more likely to encounter internal appearance issues.



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