



National Watermelon Promotion Board

Summer 2022 Consumer Research Findings



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

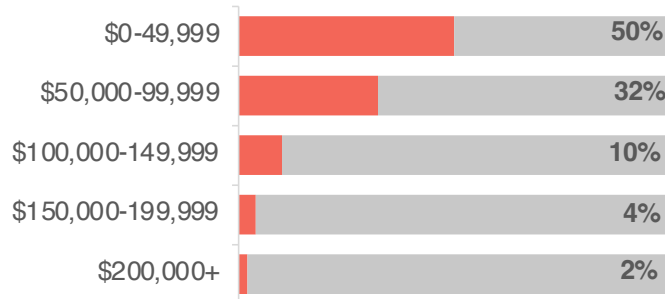
Target

U.S. Adults age 18+ who are the primary grocery shoppers

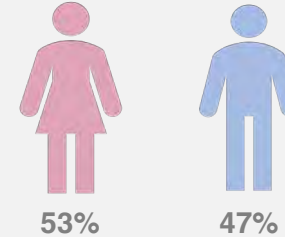
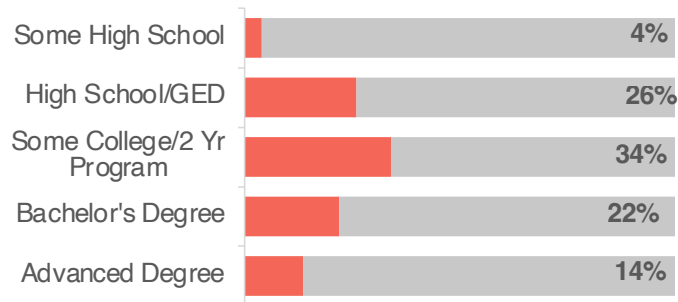


Demographics of Respondents 1096 Completes

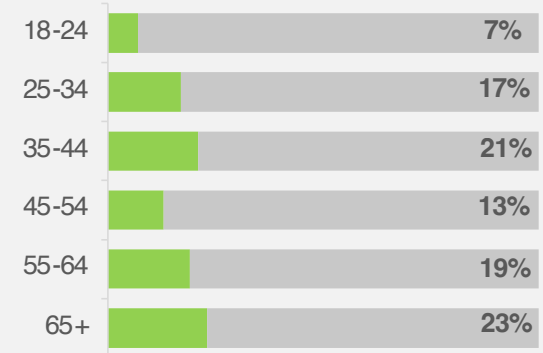
Household Income



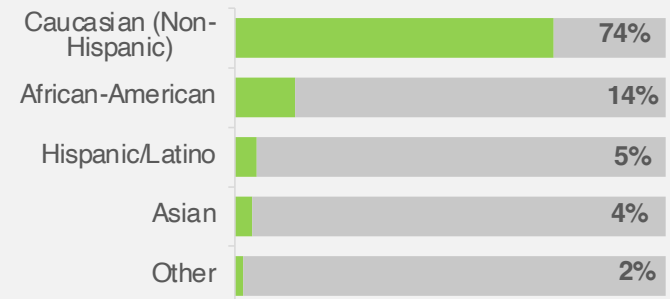
Education Level



Age

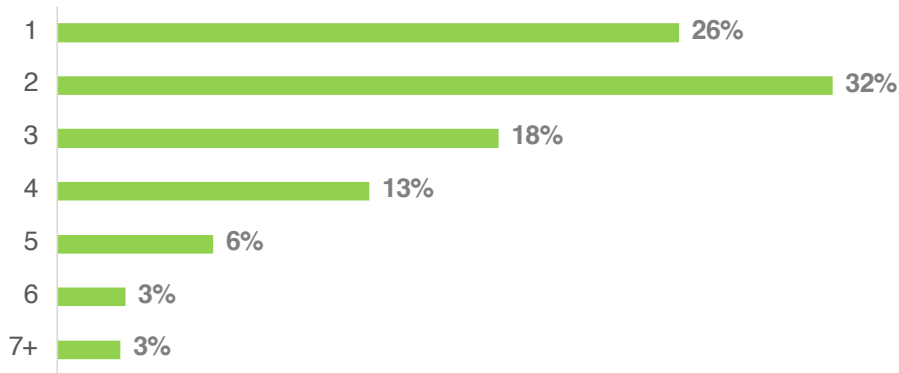


Race/Ethnicity

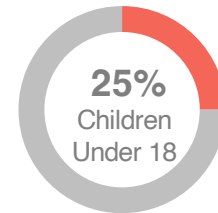
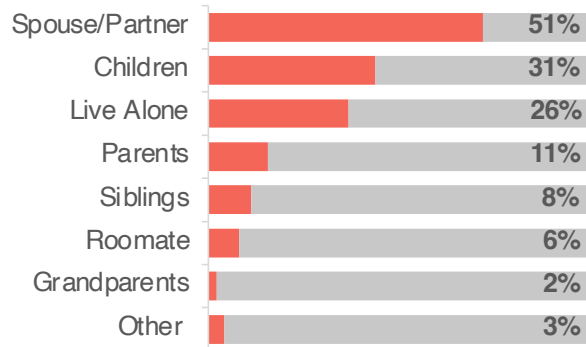


Demographics of Respondents (n=1096)

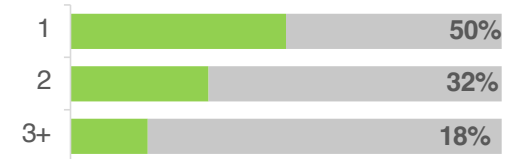
Number of People Living in Household



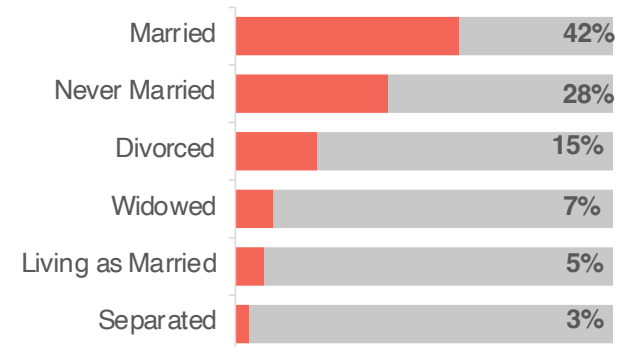
Who Lives In Household



Number of Children Under 18 (among those with children)

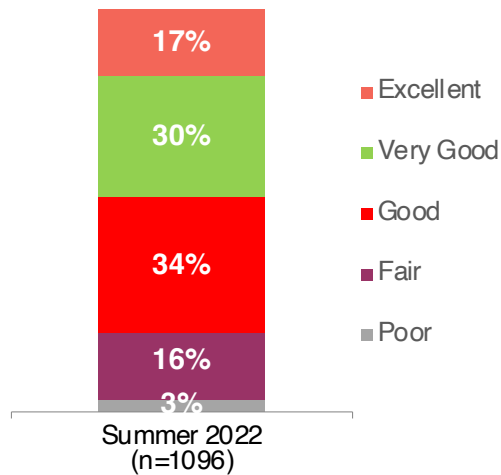


Marital Status



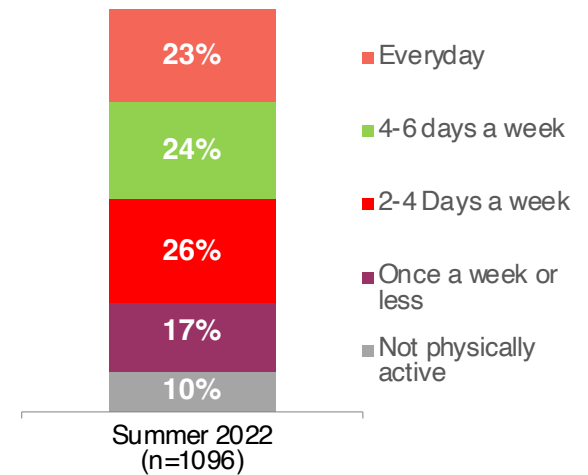
Personal Health and Fitness (n=1096)

Claimed Health Status

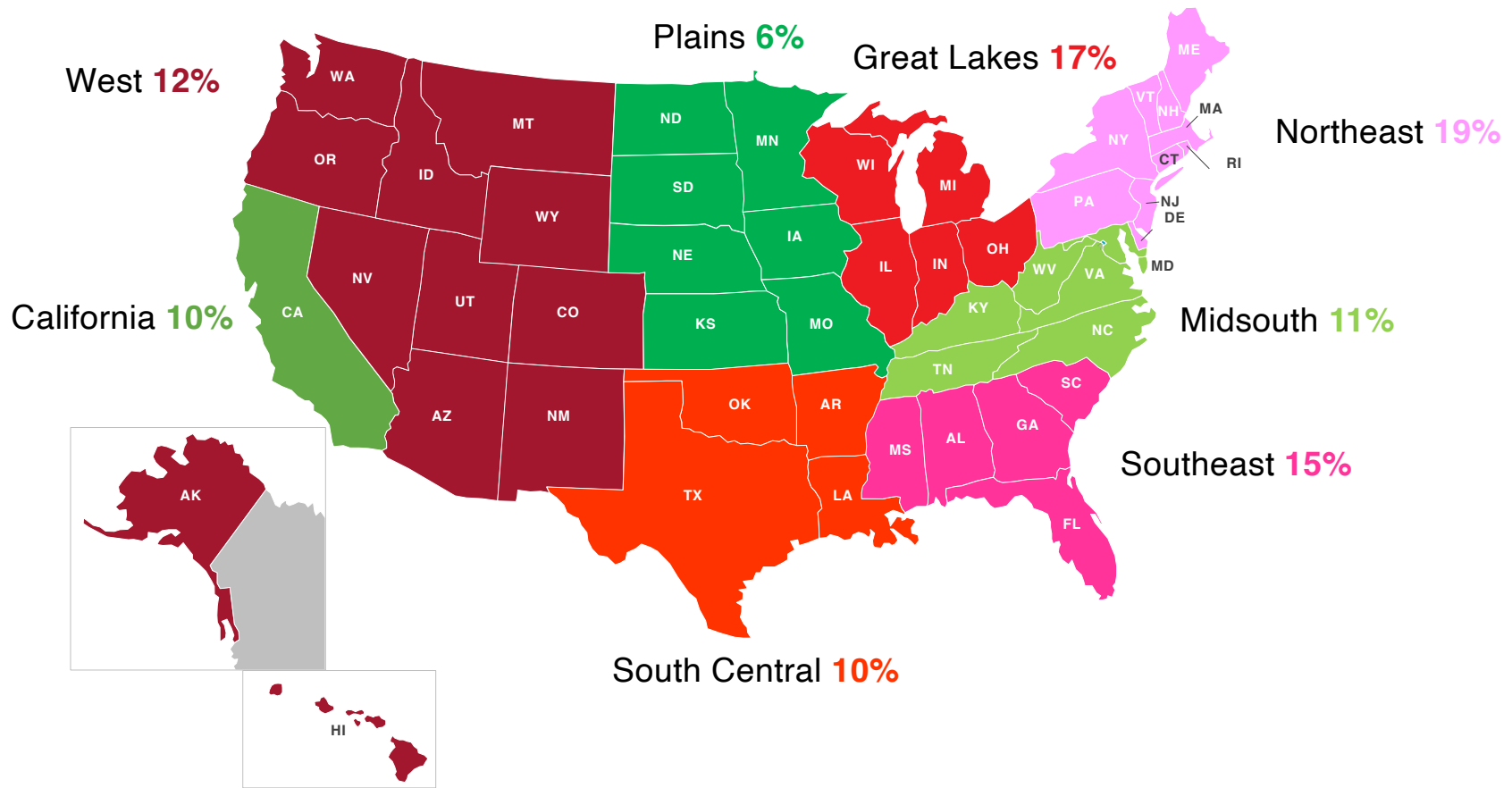


Nearly half exercise 4+ days a week and/or describe themselves as having very good/excellent health.

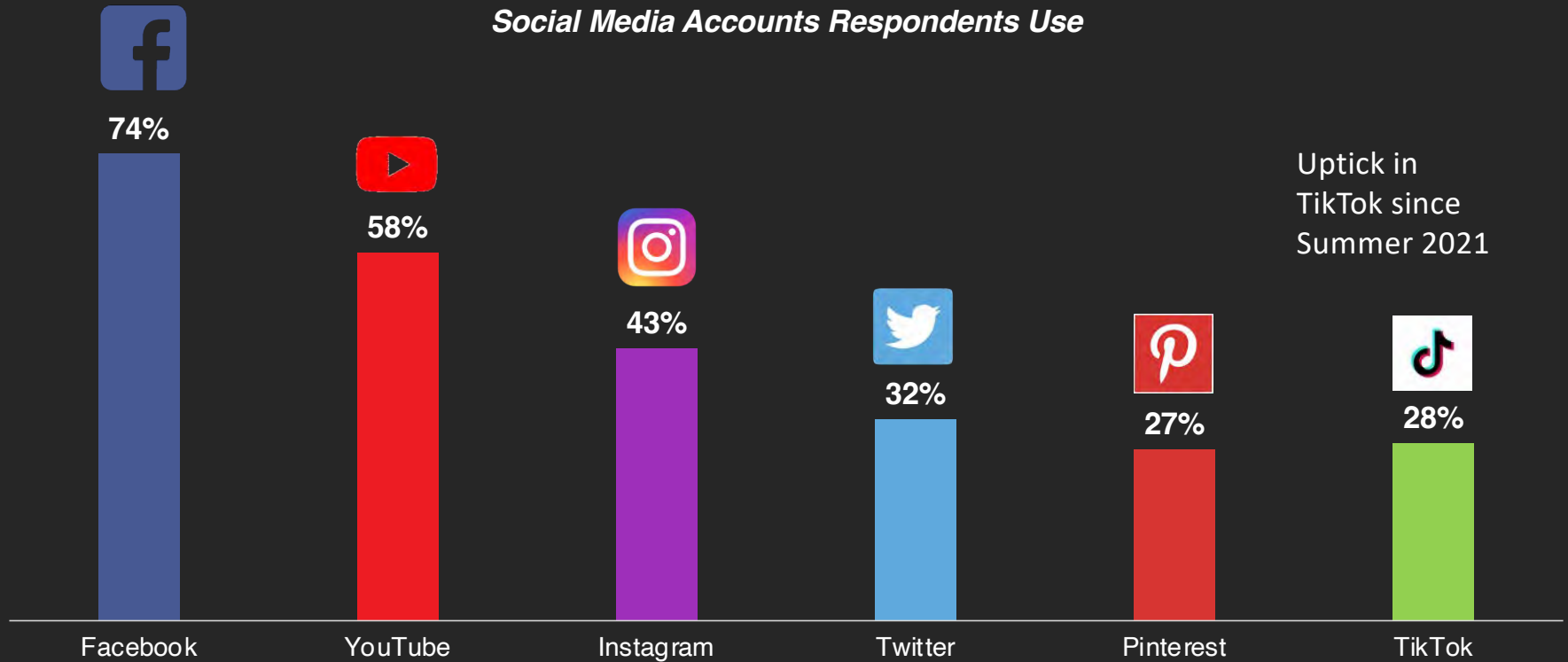
Days Per Week Active 30+ Minutes



Demographics of Respondents (n=1096)



Social Media Accounts Respondents Use



Source: Total Respondents (n=1026)
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

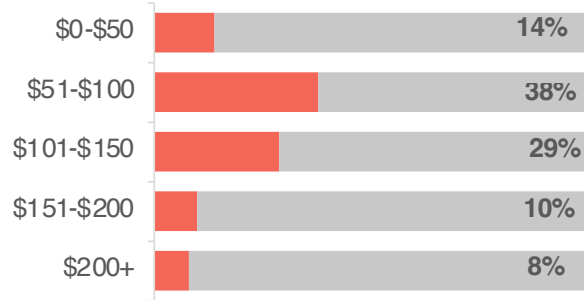
The most commonly mentioned "Other" answers included:
 -Place orders/Delivery/Pick-up (19)
 -Calculator use (8)



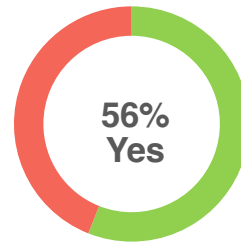
Source: Total Respondents
 Please indicate below how you have used your mobile device to assist you with your grocery shopping? (Select all that apply)



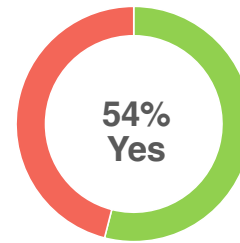
Weekly Grocery Spend



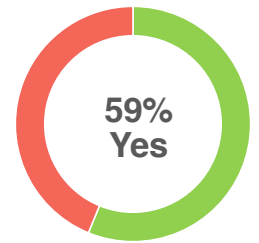
Ever Used Grocery Pick-up, Delivery, or Meal Kit Delivery



Winter 2021
(n=1182)



Summer 2021
(n=1127)



Summer 2022
(n=1096)

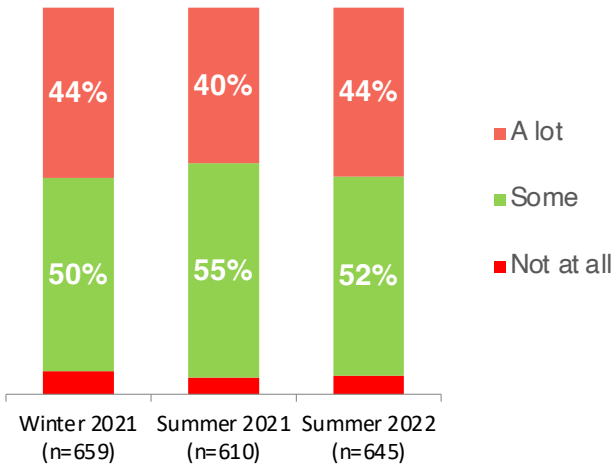
Source: Total Respondents

On average, approximately how much do you spend on groceries for your household per week?

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



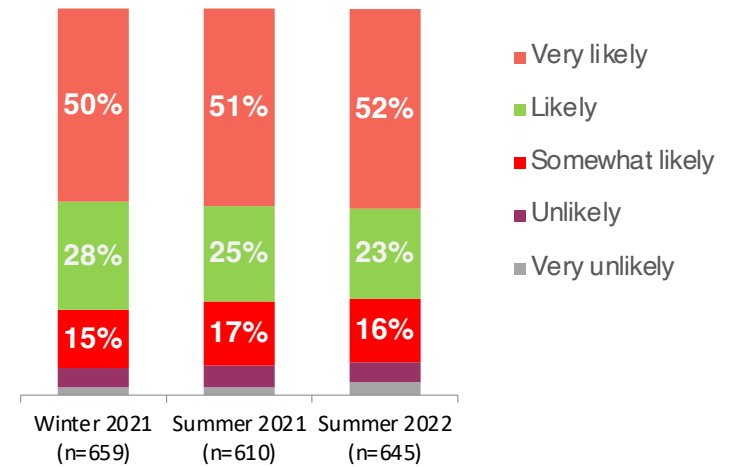
Trust to Select Produce



Services used in past 12 months

- Delivery from retail location (50%)
- Curbside pick-up (60%)
- Third party delivery (42%)
- Other (1%)

Likelihood to Continue Using

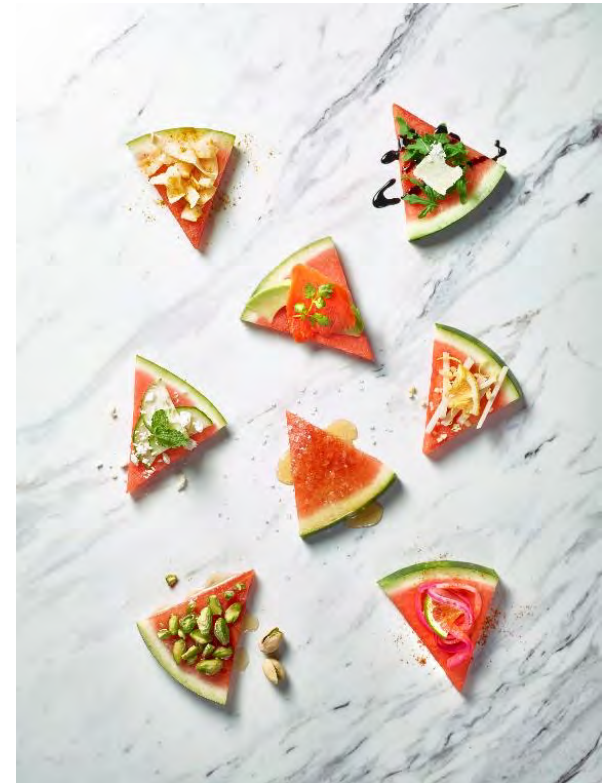
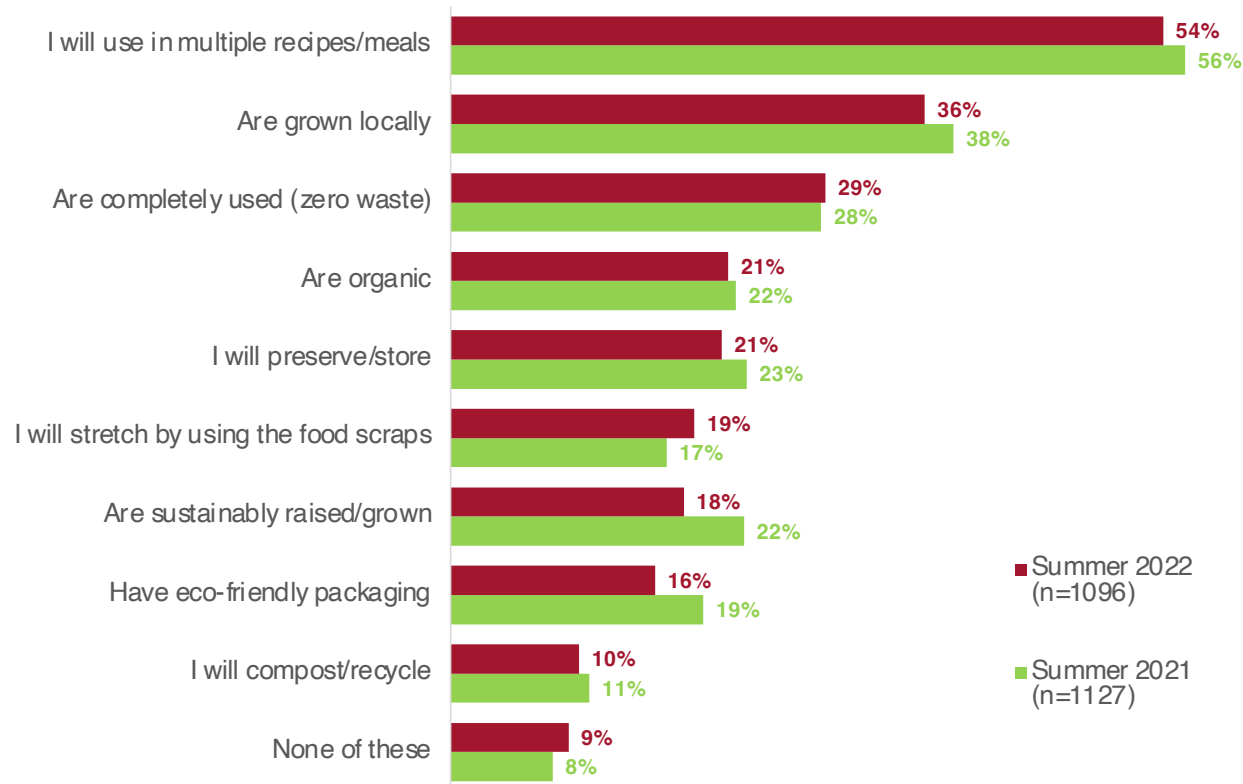


Source: Total Respondents Ever Using Grocery Pick-up or Delivery
 Which of the following grocery pick-up or grocery delivery services have you used in the past 12 months? (Select all that apply)
 How much do you trust the person who is selecting your produce for your grocery pick-up/delivery order to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



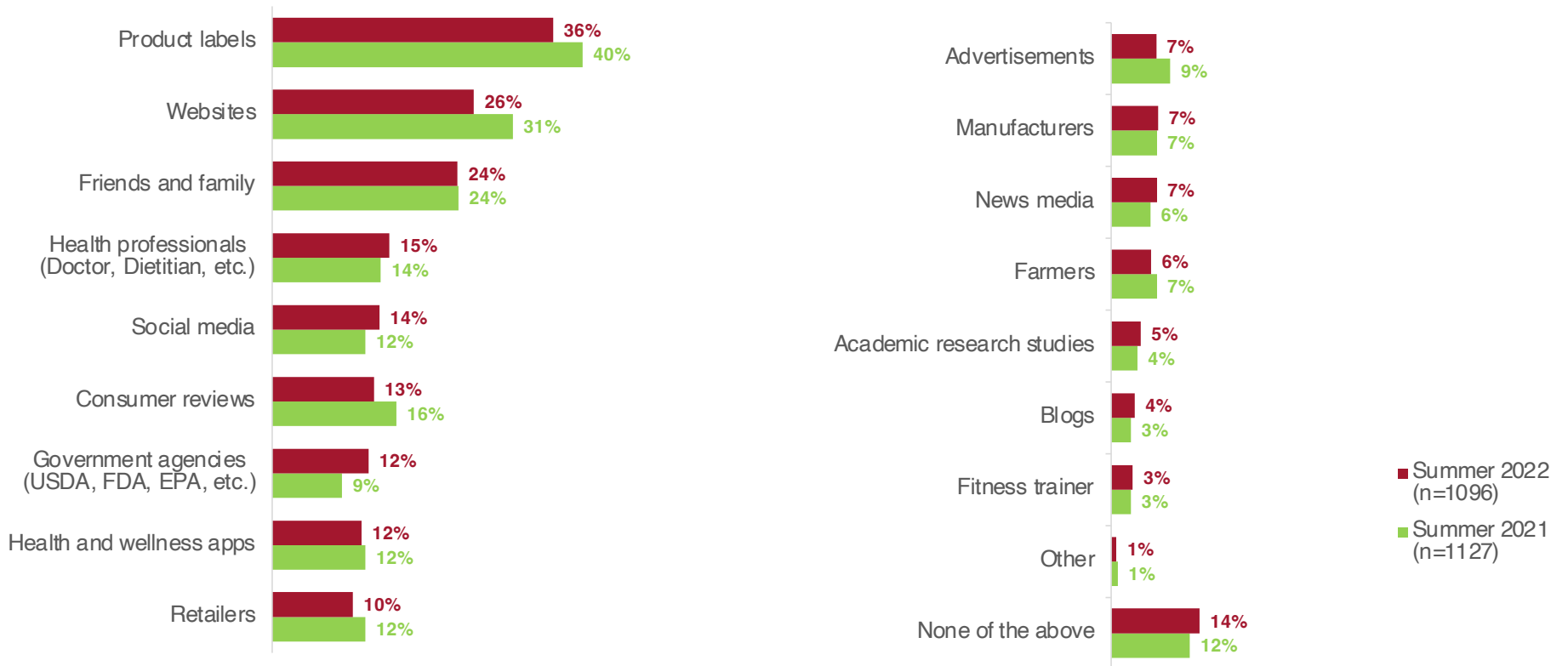
FRUIT ATTITUDES & CONSUMPTION

I Feel Better When I Purchase Food That ...



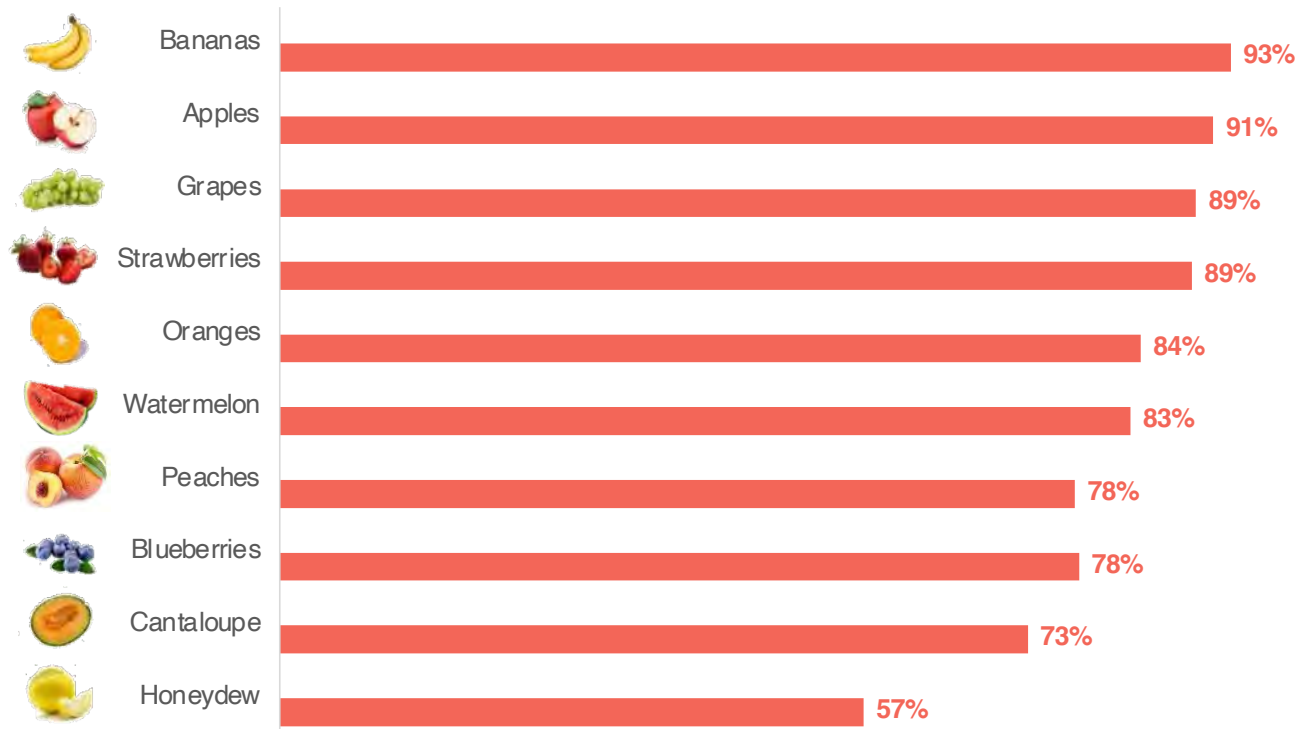
Source: Total Respondents
 I feel better when I make food purchases that: (Select up to 3 items)
 Note: Question wording and format changed dramatically in Summer 2021, only showing comparable waves

Resources Most Referenced for Accurate Information on Foods Consumed



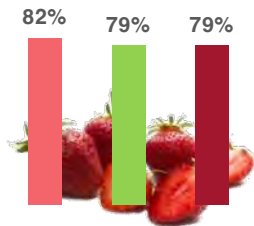
Source: Total Respondents
Where do you most often go for accurate information on the foods you eat? (Select up to 3)

Fruits purchased in past 12 months

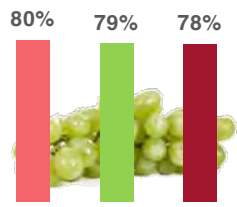


Source: Total Respondents (n=1026)
For each of the following types of fruit, please indicate where you have primarily purchased it in the past 12 months.

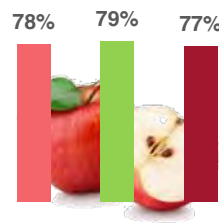
Percent Of People That Like The Taste Of ...



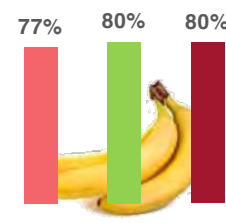
Strawberries



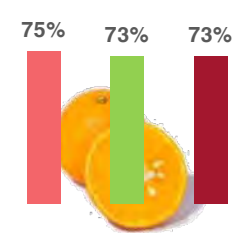
Grapes



Apples

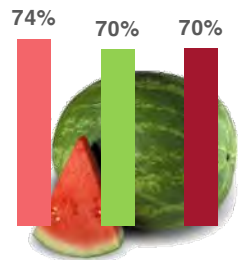


Bananas

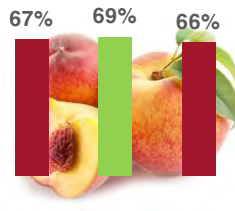


Oranges

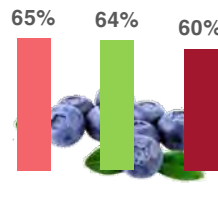
● Winter 2021 (n=1182) ● Summer 2021 (n=1127) ● Summer 2022 (n=1096)



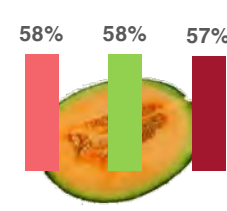
Watermelon



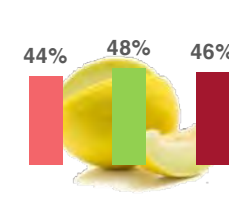
Peaches



Blueberries



Cantaloupes



Honeydews

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

Average number of fruits that a respondent likes the taste of increases with age from 5.5 to 7.7

Freshness Rankings - Summer 2022

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

Source: Total Respondents (n=1026)
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	97%	8.0	8.4
Bananas	95%	8.1	8.3
Oranges	95%	8.0	8.4
Peaches	95%	7.7	8.1
Watermelon	95%	7.7	8.0
Grapes	94%	7.6	7.9
Strawberries	93%	7.9	8.3
Blueberries	93%	7.8	8.4
Cantaloupe	93%	7.3	7.8
Honeydew	92%	7.1	7.6

Source: Total Respondents (n=1096)

Note: Red box indicates a .2 or greater decrease from Summer 2021

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

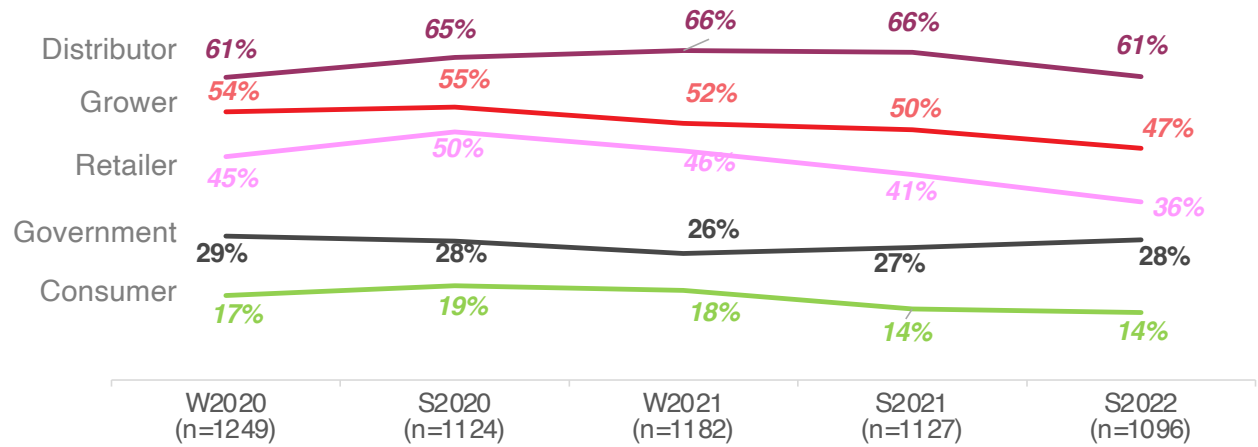
Summer 2021

Summer 2022

7.2

7.1











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	77%	4%	8%	2%	1%
	Bananas	78%	6%	5%	2%	2%
	Blueberries	58%	6%	9%	4%	1%
	Cantaloupe	53%	4%	10%	4%	1%
	Grapes	74%	6%	6%	3%	1%
	Honeydew	42%	4%	7%	3%	2%
	Oranges	69%	5%	6%	3%	2%
	Peaches	55%	6%	11%	6%	1%
	Strawberries	68%	5%	11%	4%	2%
	Watermelon	63%	5%	9%	5%	2%

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

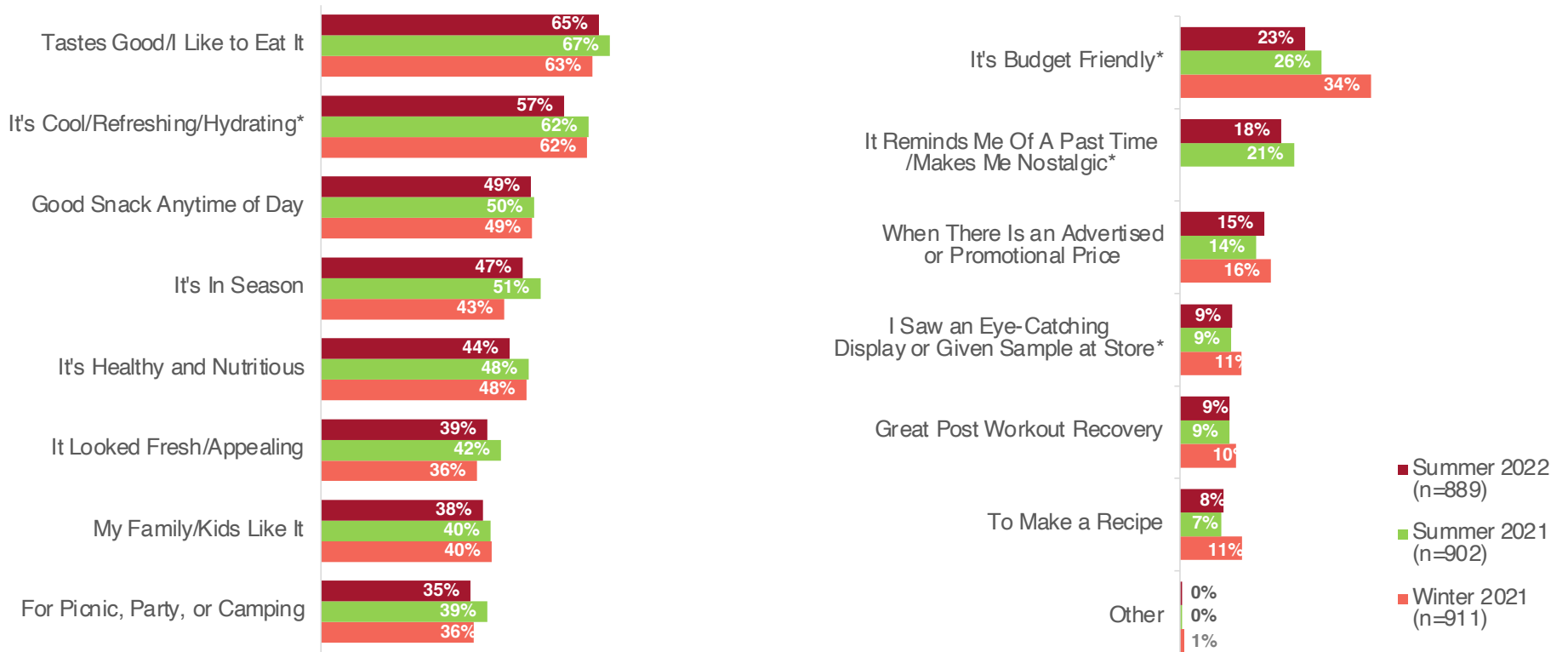
Source: Total Respondents (n=1096)

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



WATERMELON ATTITUDES

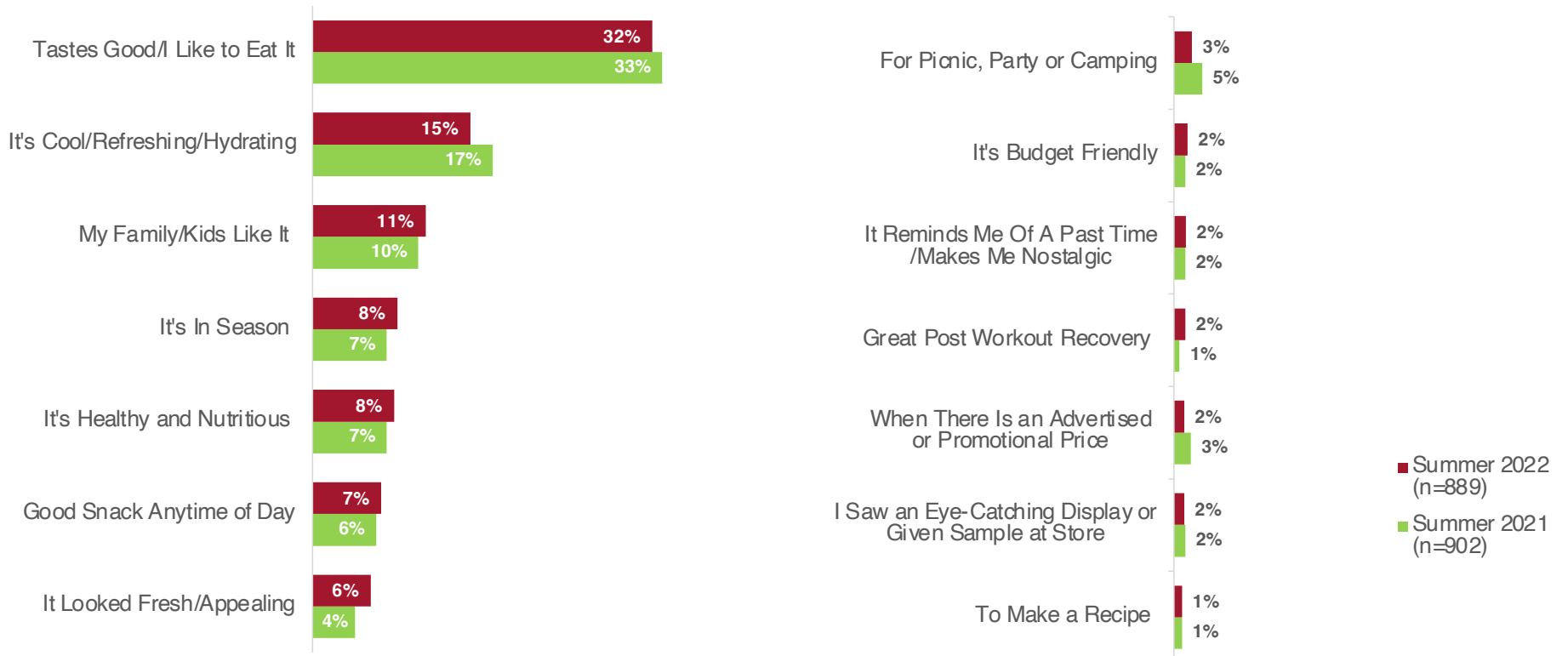
Reasons to Purchase Watermelon



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

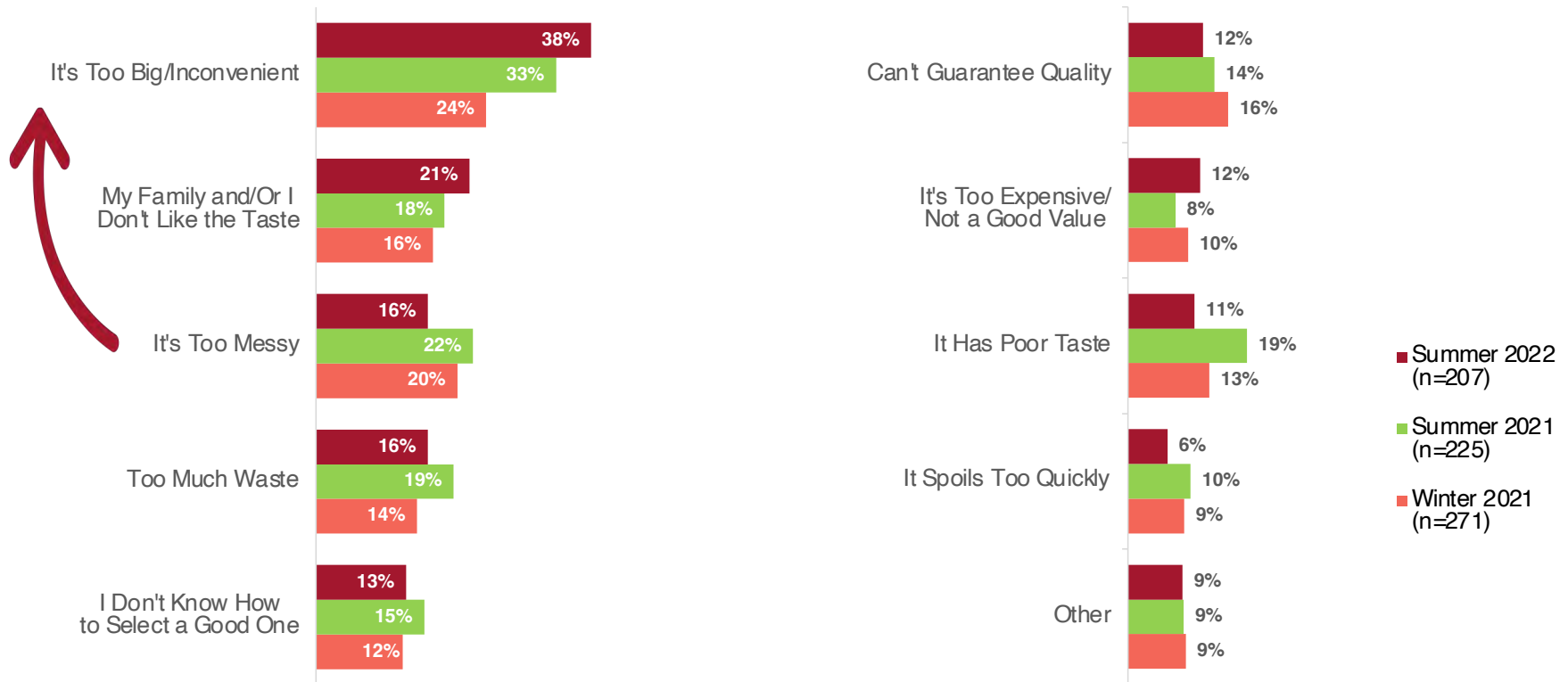
Average number of reasons purchase watermelon increases with age from 3.8 reasons to 5.2 reasons.

MAIN Reason to Purchase Watermelon



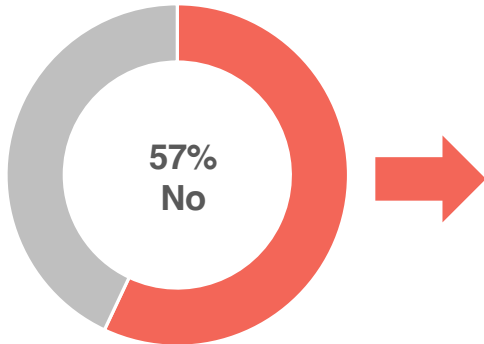
Source: Total Respondents Purchasing Watermelon
 Which of the following reasons is the MAIN reason you purchase watermelon?
 New question Summer 2021

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 2022 (n=93)

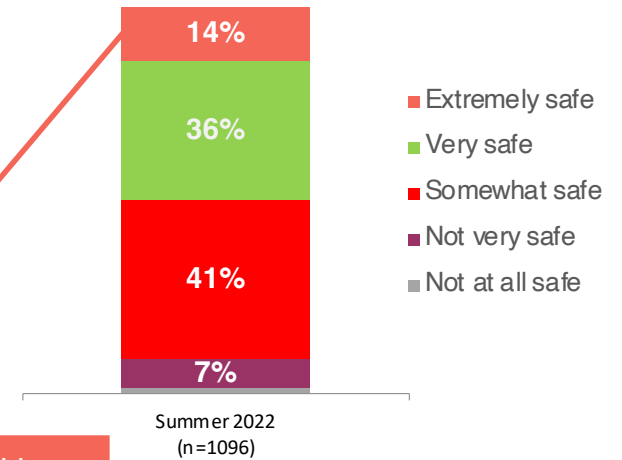
NOT willing to buy is up from Summer 2021 (53%)

Reasons won't buy fresh cut watermelon:

- Dislike watermelon/eat other fruits (27)
- Cost (10)
- Cleanliness/safety (7)
- Freshness/Ripeness Issues (5)
- Nutritional/Dietary Issues (4)

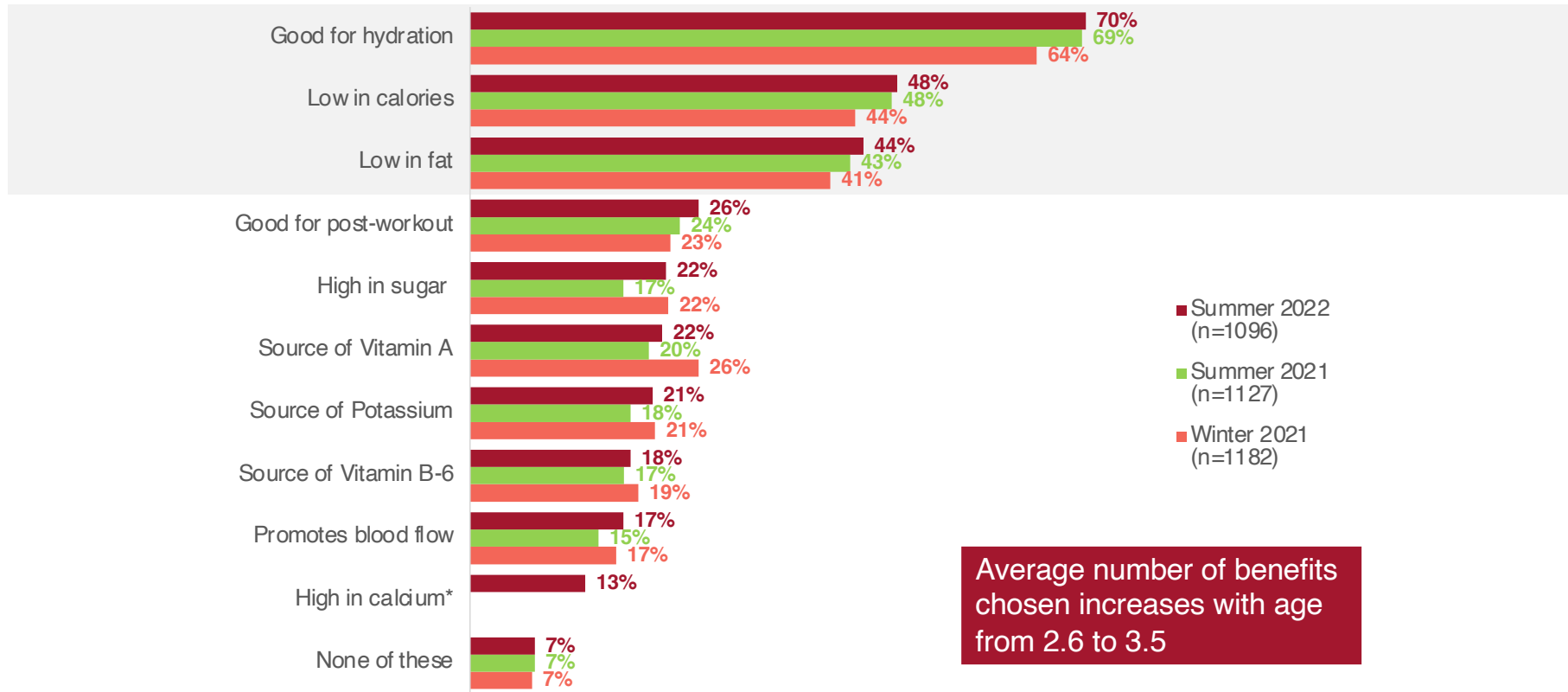
Extremely + very safe decreases with age from 55% for 18-34 to 45% for 65+

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 Benefits of Watermelon



Average number of benefits chosen increases with age from 2.6 to 3.5

Source: Total Respondents
 *New answer option in Summer 2022
 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

- 18-34 (85%)
- 35-44 (82%)
- 45-54 (81%)
- 55-64 (71%)
- 65+ (58%)

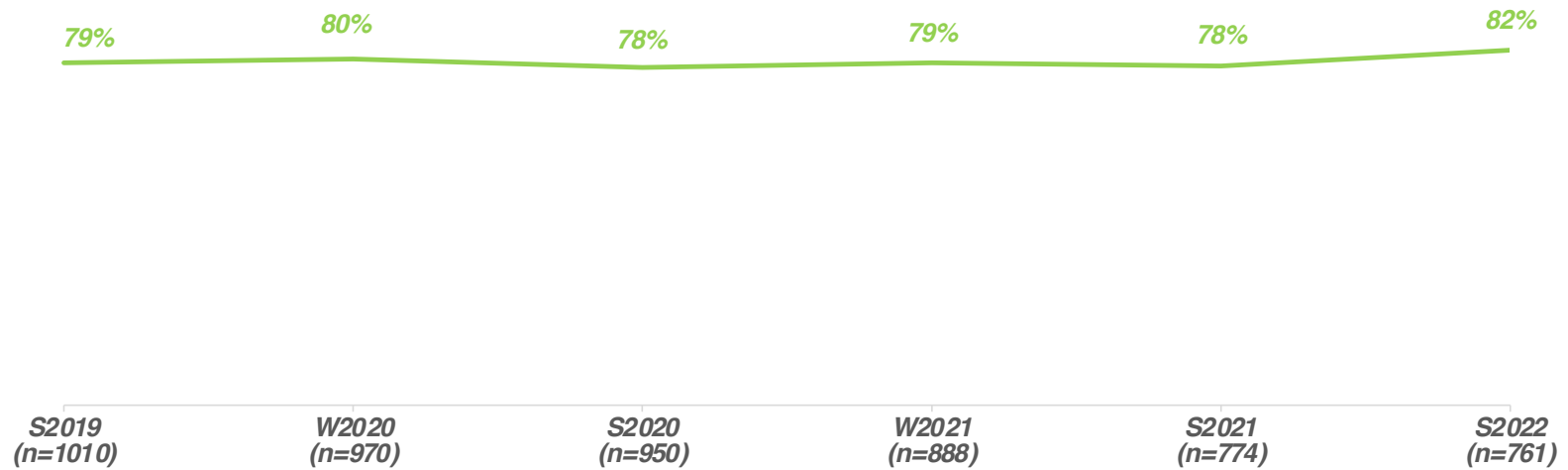
S2019 (n=1257) W2020 (n=1249) S2020 (n=1124) W2021 (n=1182) S2021 (n=1127) S2022 (n=1096)

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



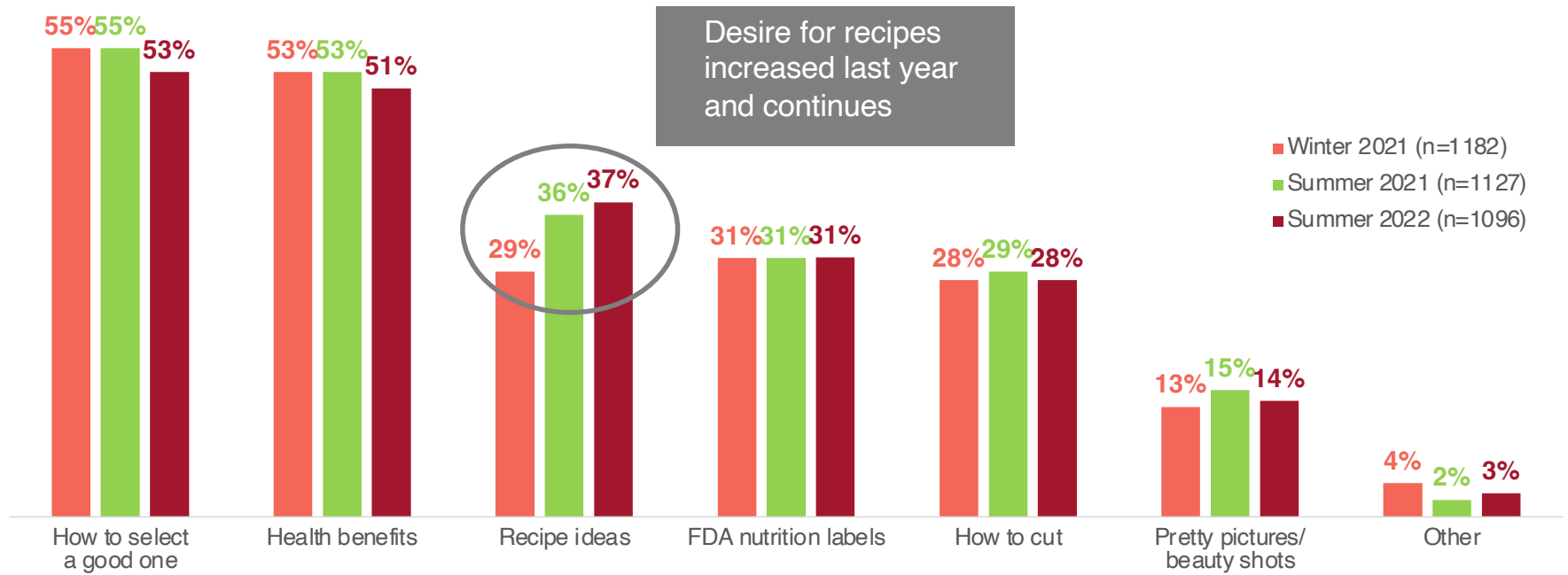
WATERMELON PURCHASING

Percent Saying Yes to Knowing How to Pick a Good Watermelon



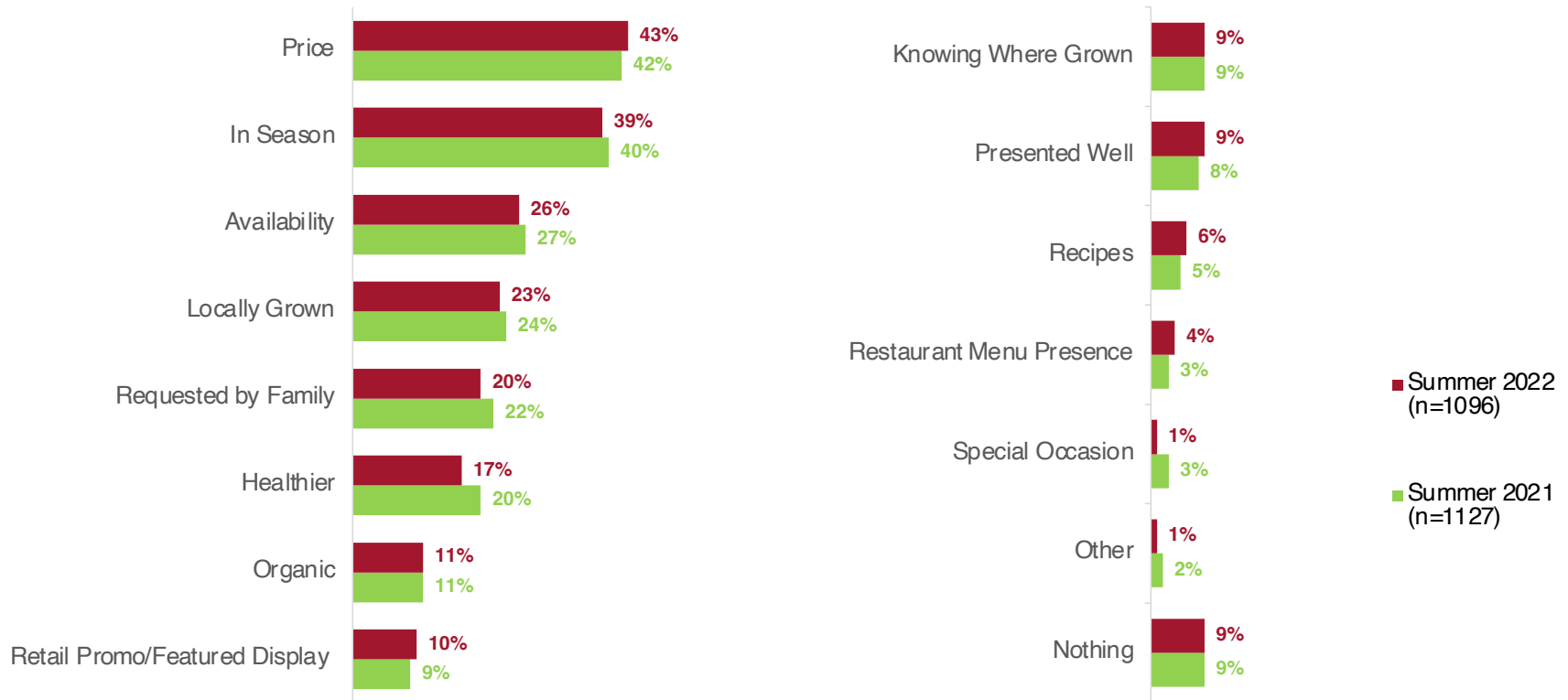
Source: Total Respondents Purchasing Whole/Mini Watermelon
Do you know how to pick out a good watermelon?

Type of Information Would Like to See at Store



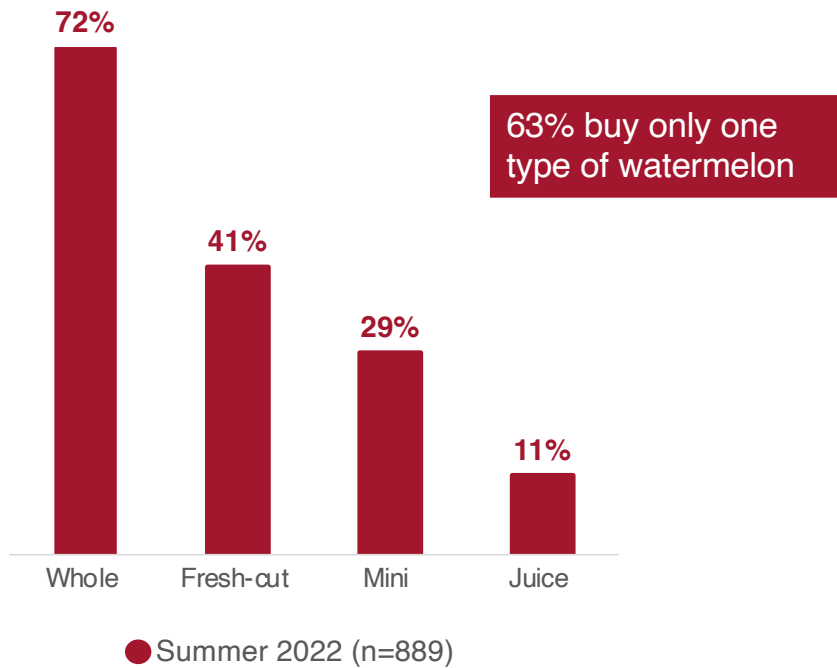
Source: Total Respondents
 What type of information would you like to see displayed with watermelon at the retail store?

Encourage to Purchase More Watermelon

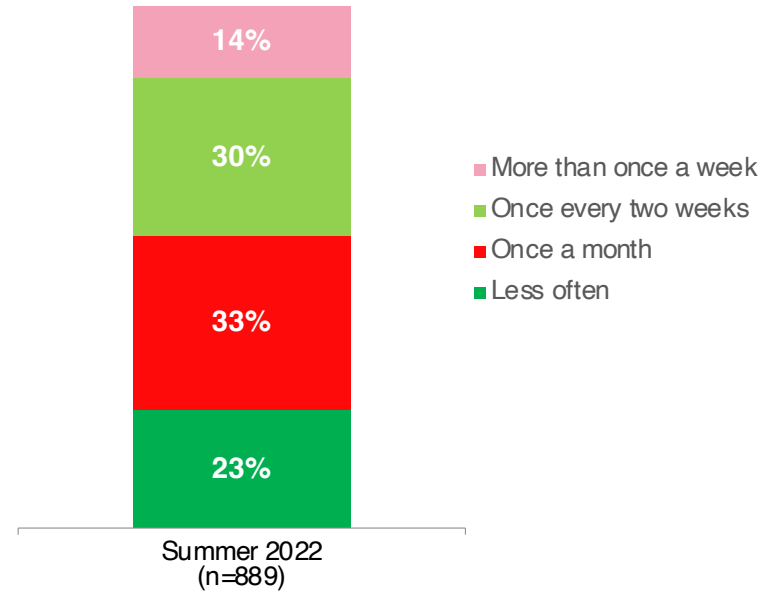


Source: Total Respondents
 What might encourage you to purchase (or purchase more) watermelon? (Select up to 3 reasons)
 Note: Question wording and format changed dramatically in Summer 2021, only showing comparable waves

Types of Watermelon Purchased Past 12 months

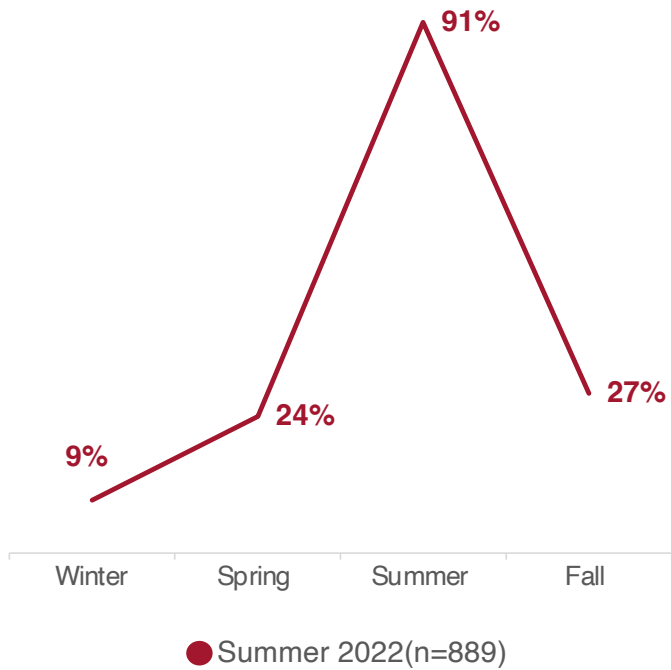


Frequency of Purchasing Watermelon Past 12 months

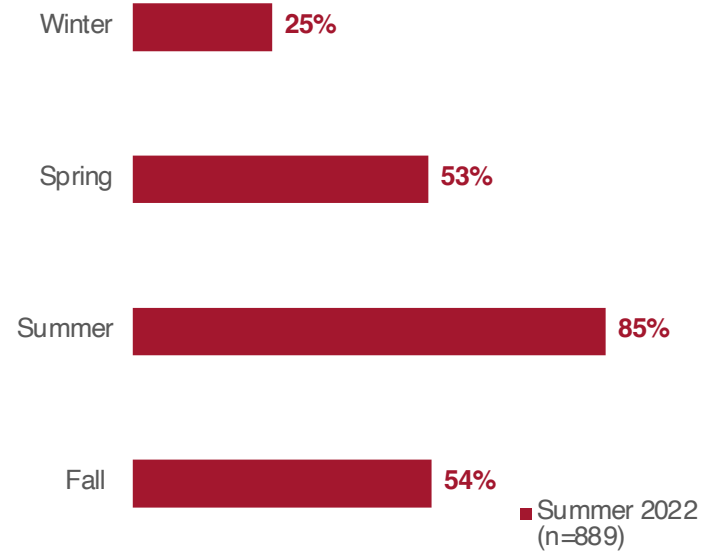


Source: Total Respondents Purchasing Watermelon
 Which of the following types of watermelon have you purchased in the past 12 months? (Select all that apply)
 In the past 12 months, how often did you purchase any type of watermelon?

Seasons Typically Purchase Watermelon

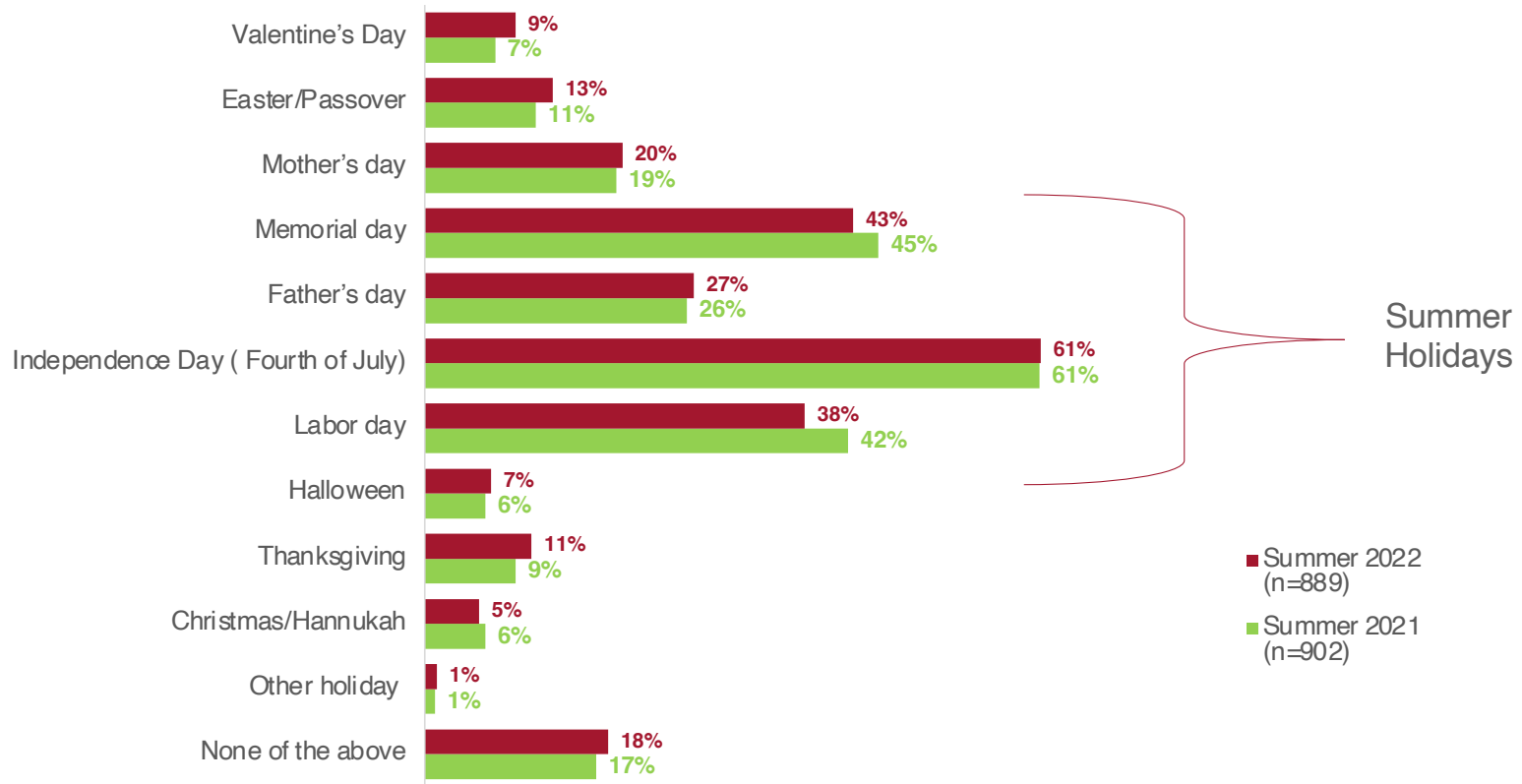


Likelihood to Purchase by Season *Definitely + Probably Would Buy*



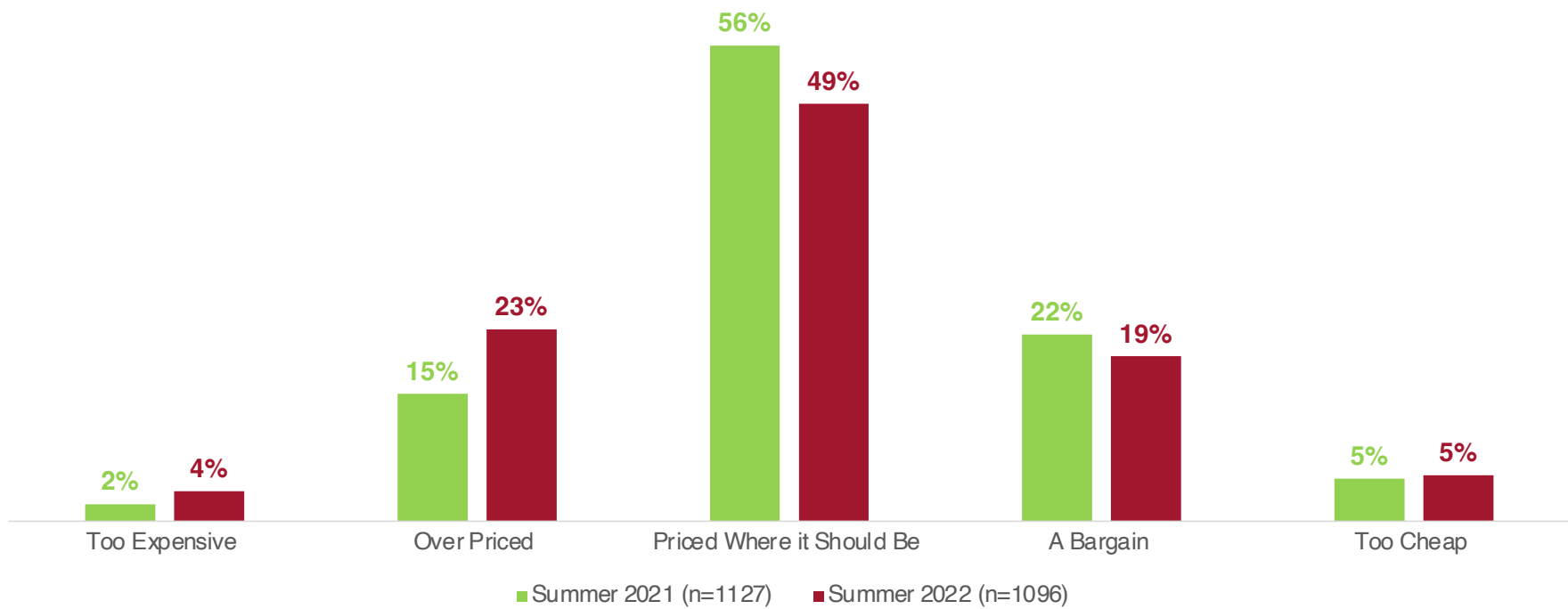
Source: Total Respondents Purchasing Watermelon
In what seasons do you typically purchase any type of watermelon? (Select all that apply)
How likely are you to purchase watermelon in each of the following seasons?

Purchased Watermelon For Specific Holidays



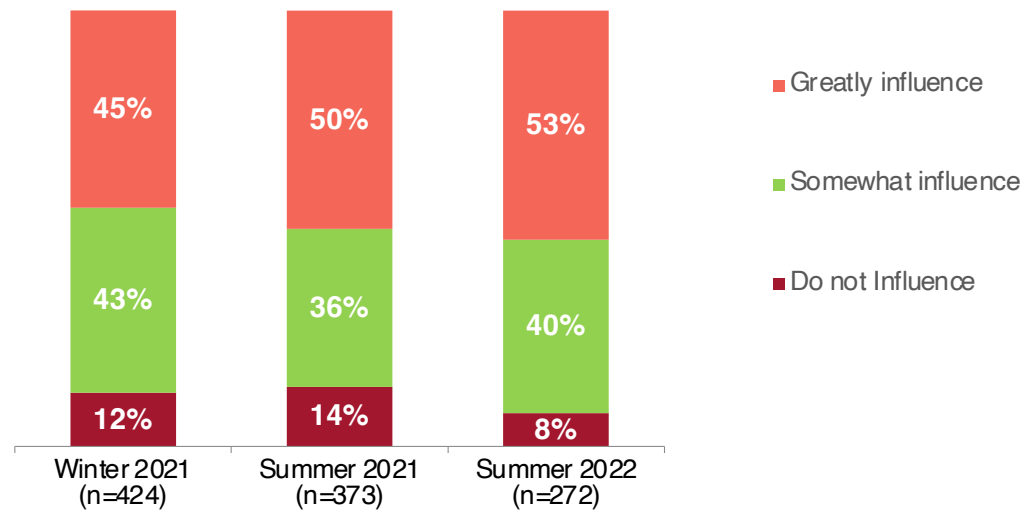
Source: Total Respondents Purchasing Watermelon
Which of the following holidays, if any, have you purchased watermelon for in the past 12 months?

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?

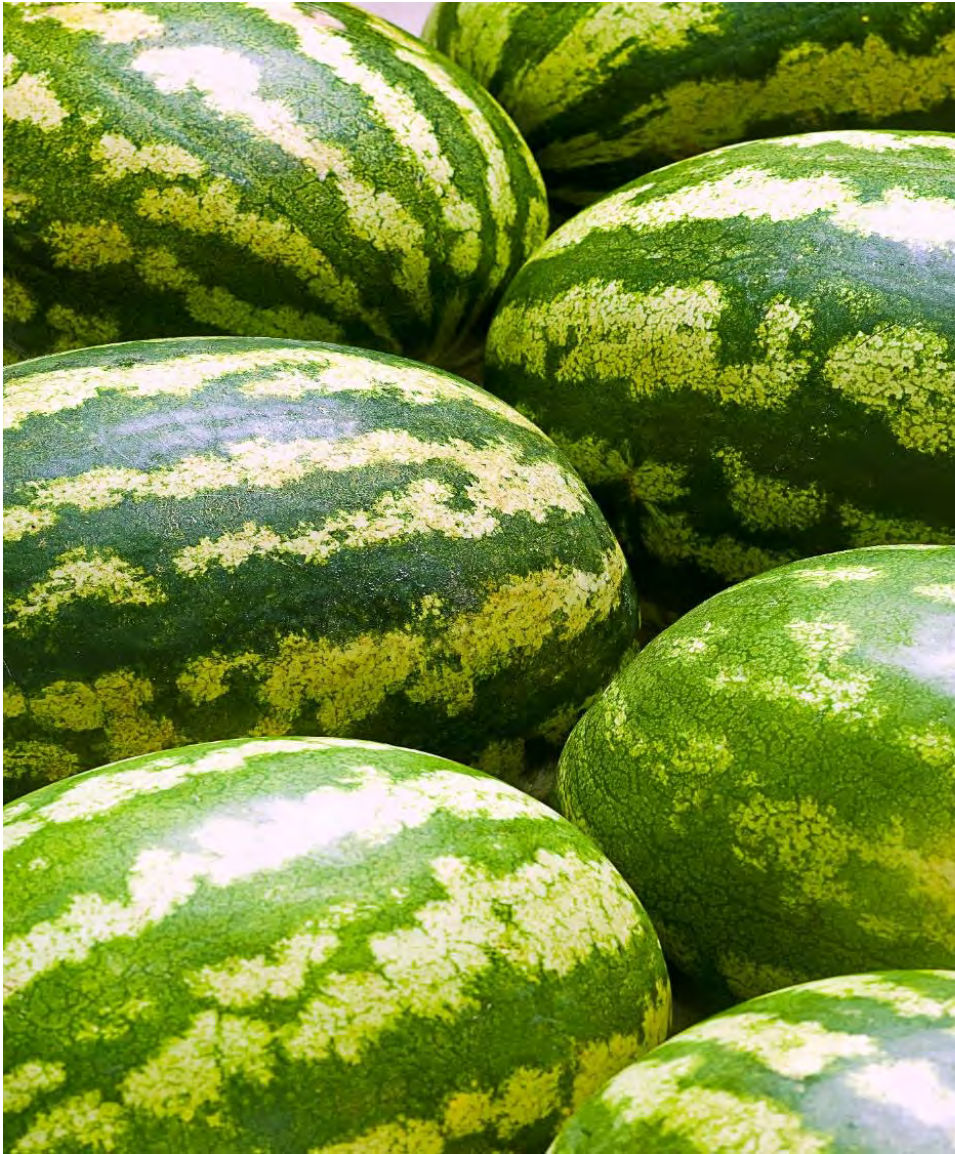
Influence Children Have on Watermelon Purchases



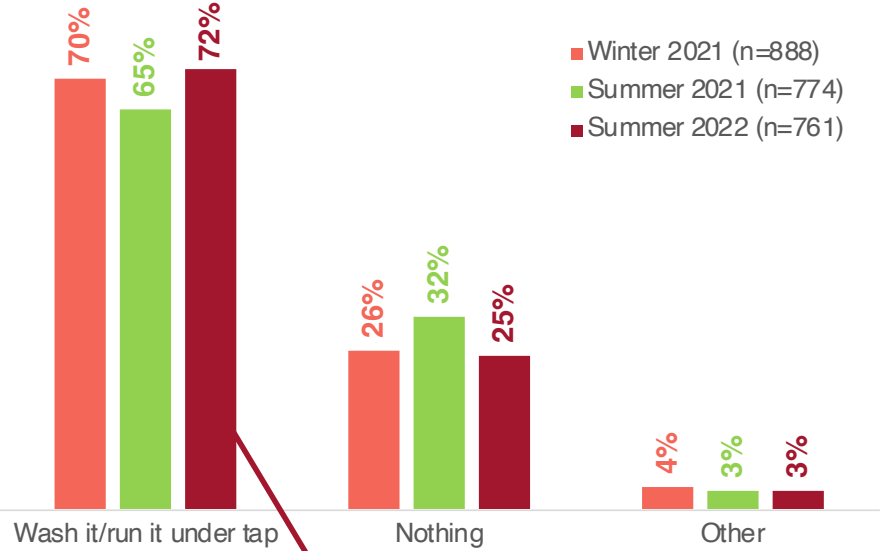
Source: Total Respondents with Children
How much do your children influence your watermelon purchases?

WATERMELON CONSUMPTION





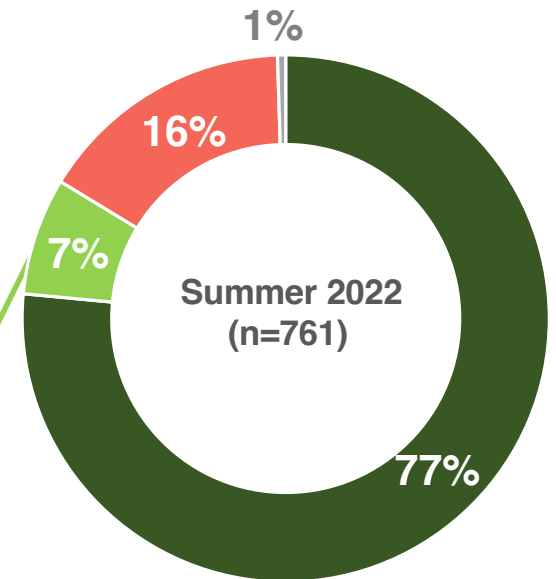
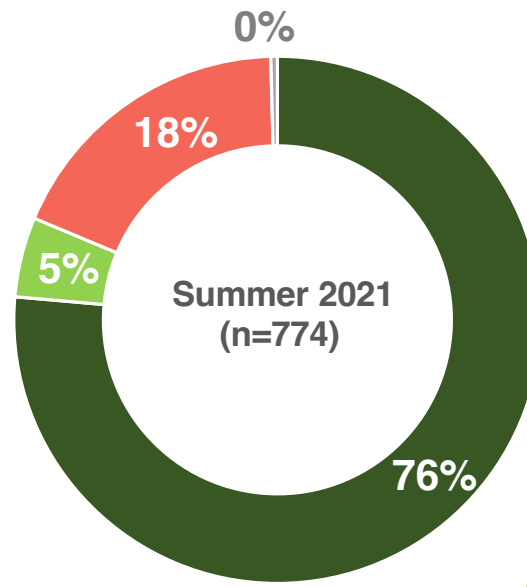
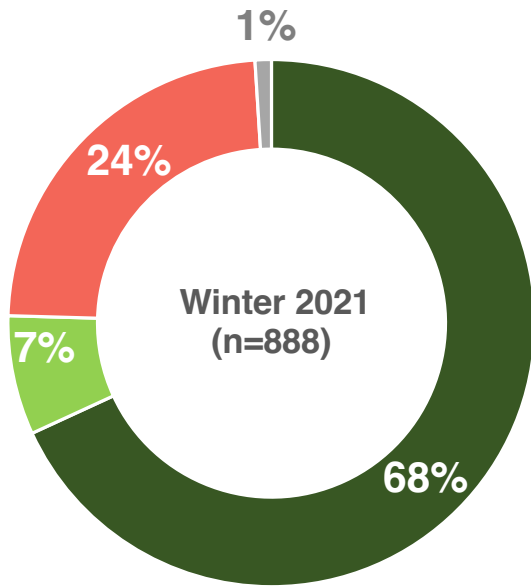
How Watermelon is Being Handled Before Consumption



Washing/running under tap decreases with age from 89% for 18-24 to 63% 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

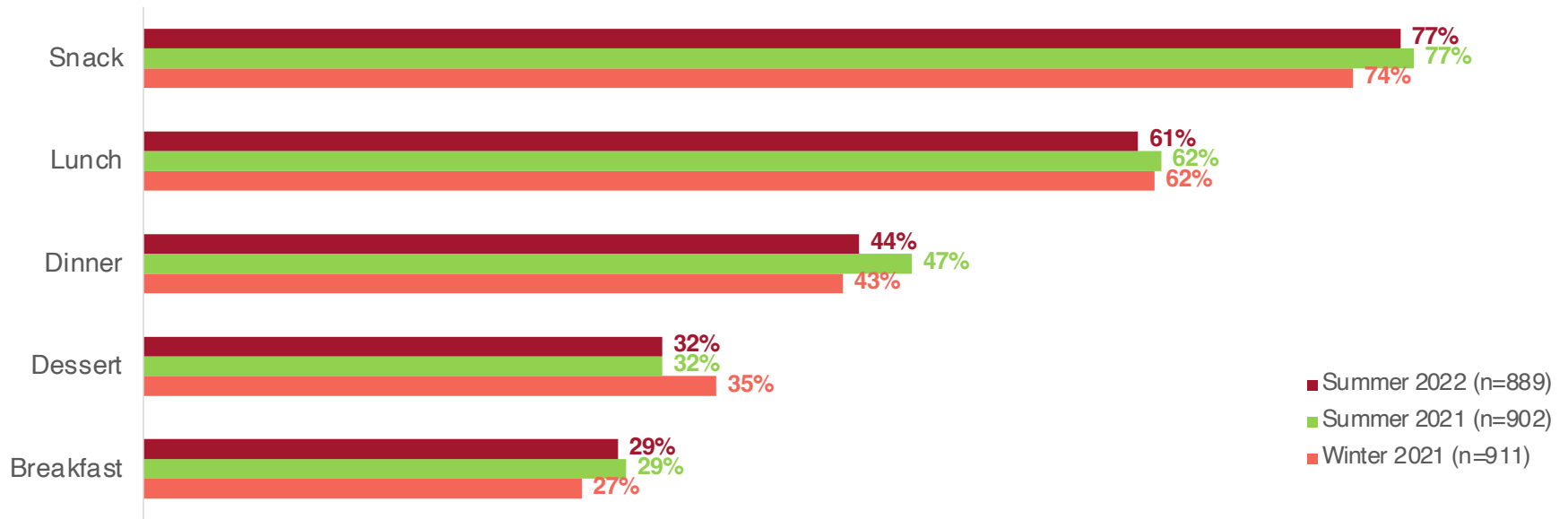


- In the fridge
- In the freezer
- On the counter
- Other

Storage in freezer is over double for age 18-24 (15%)

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

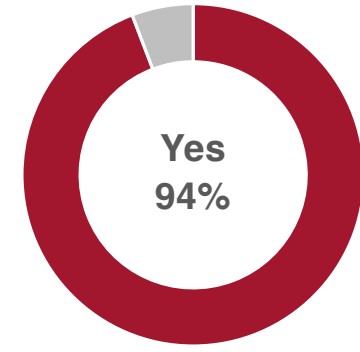
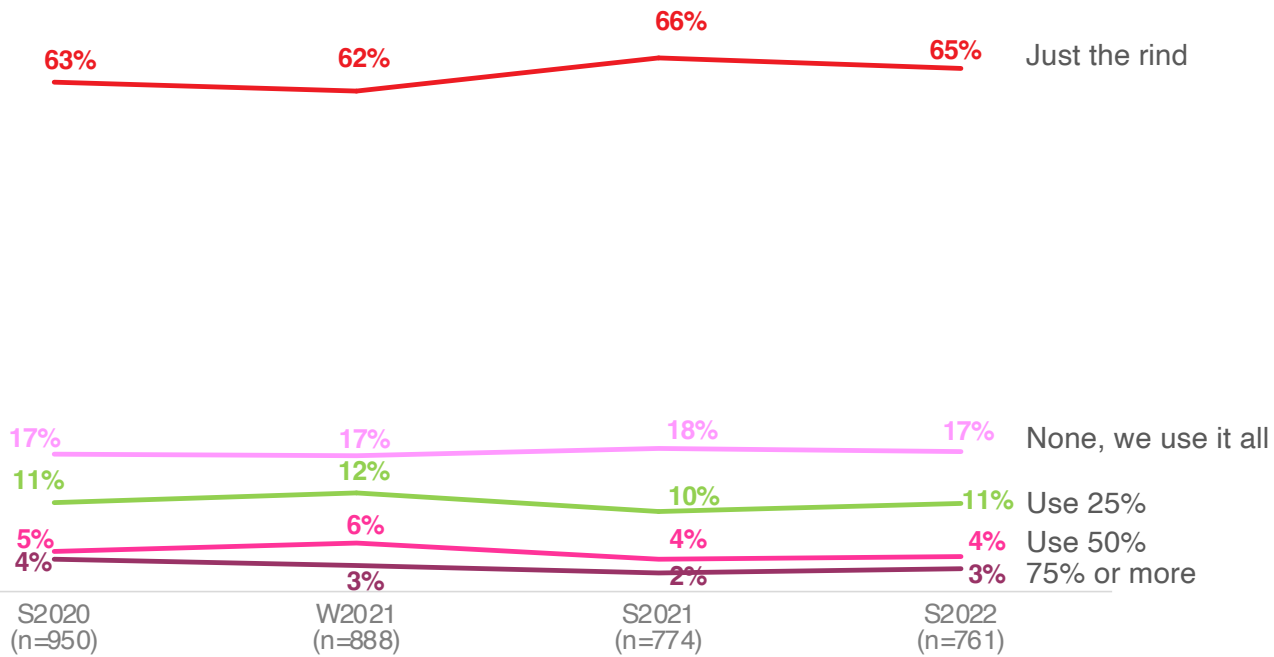
Time of Day Watermelon is Eaten



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

Know How to Cut a Whole Watermelon

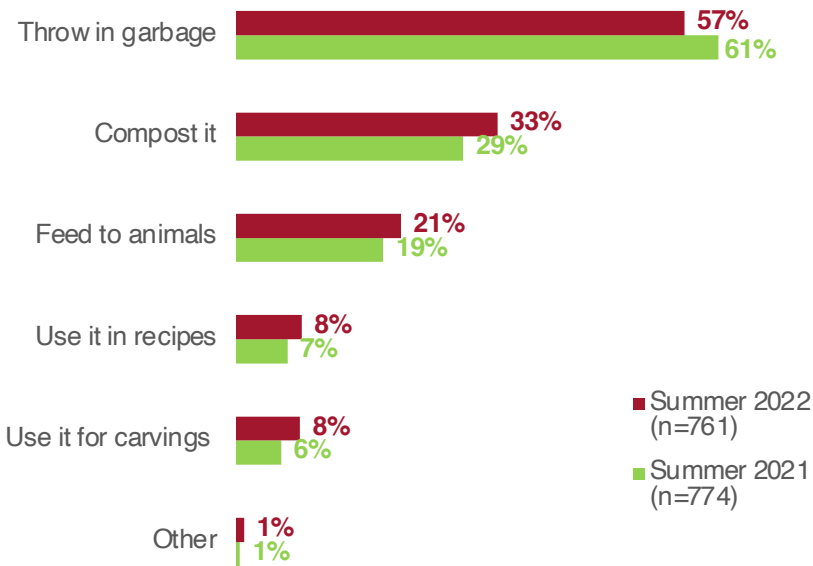
Percentage of Watermelon Going to Waste



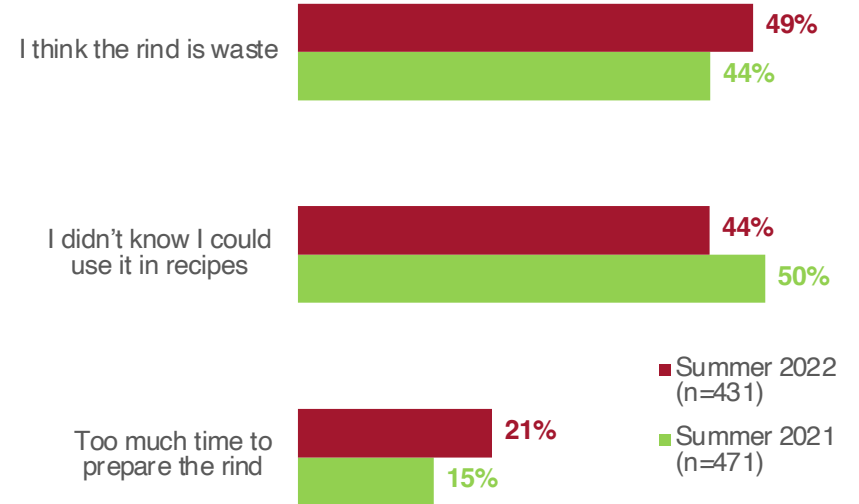
Summer 2022 (n=761)

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

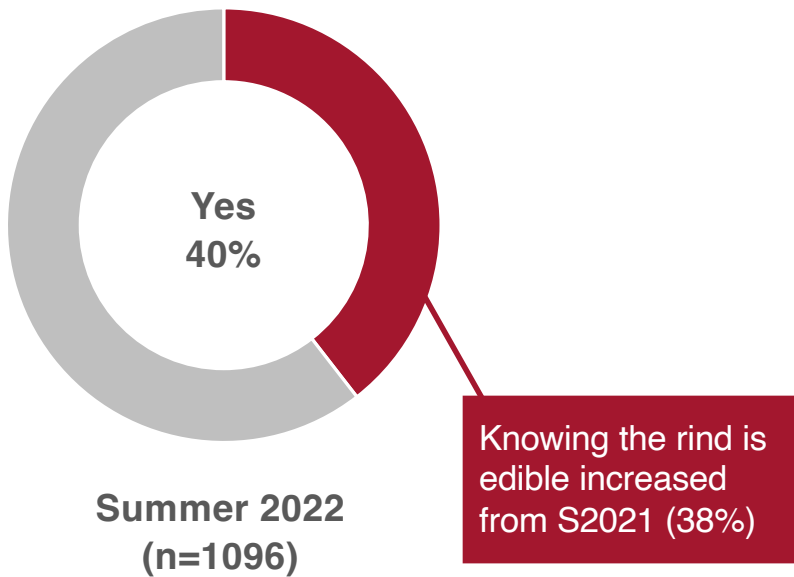


Reasons Not Use Rind

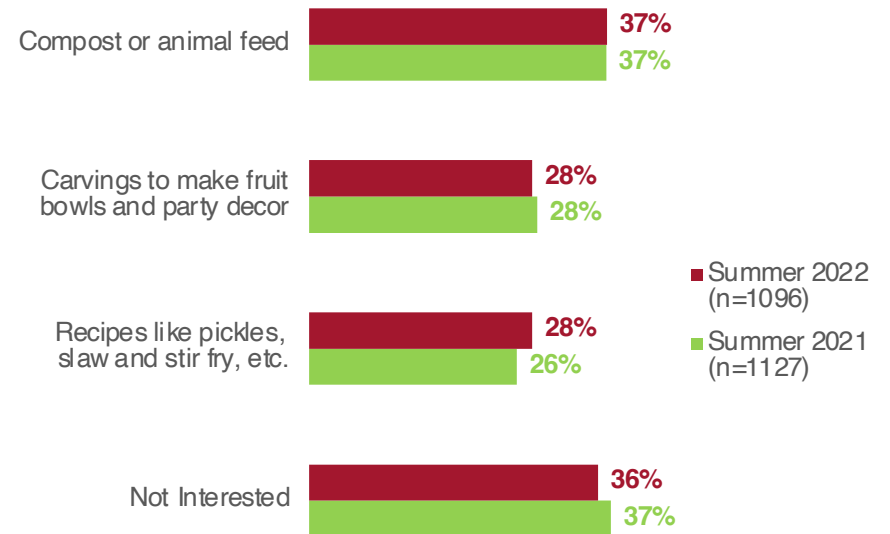


Source: Total Respondents Purchasing Whole or Mini Watermelon
 What do you do with the rind? (Select all that apply)
 Source: Total Respondents Who Throw The Rind In The Garbage
 Of the following reasons, which best describes why you don't use the watermelon rind?

Know the Rind is Edible

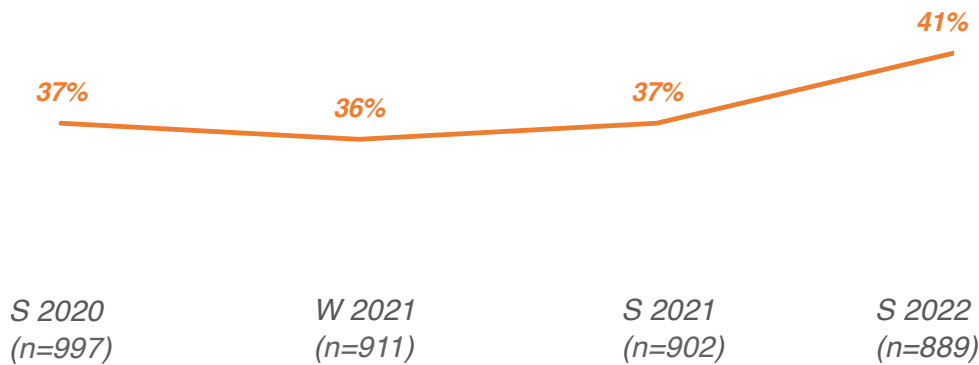


Interest in Using Watermelon Rind For



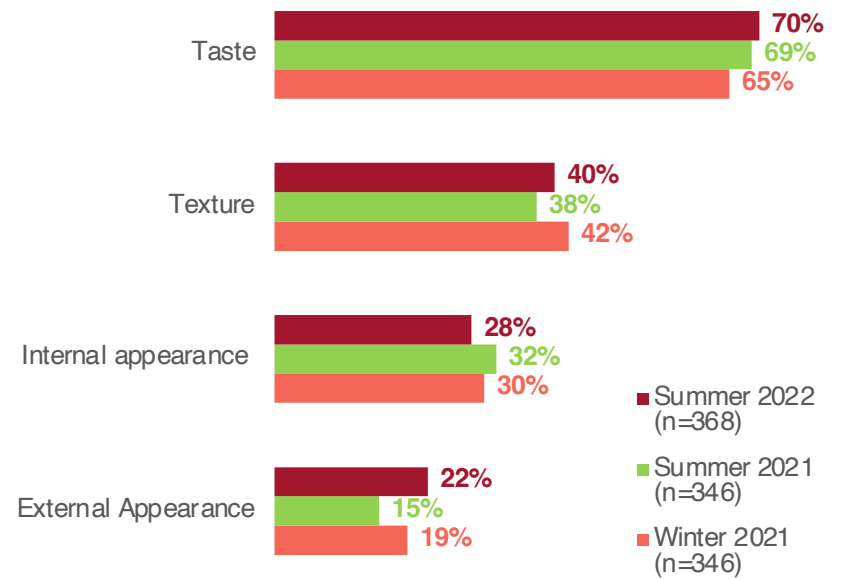
Source: Total Respondents
 Did you know that watermelon rind is edible?
 Which of the following, if any, would you be interested in using watermelon rind for? (Select all that apply)

Percent Indicating Quality Issues with Watermelon Purchase



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?

Issues with Watermelon Quality



Those age 18-44 have more external appearance quality issues (32%) while those age 65+ have more internal appearance issues (36%)

Consumption by Percentage of Time

Summer 2022
(n=889)

88%
Plain watermelon

12%
In a recipe

Summer 2021
(n=902)

87%
Plain watermelon

13%
In a recipe

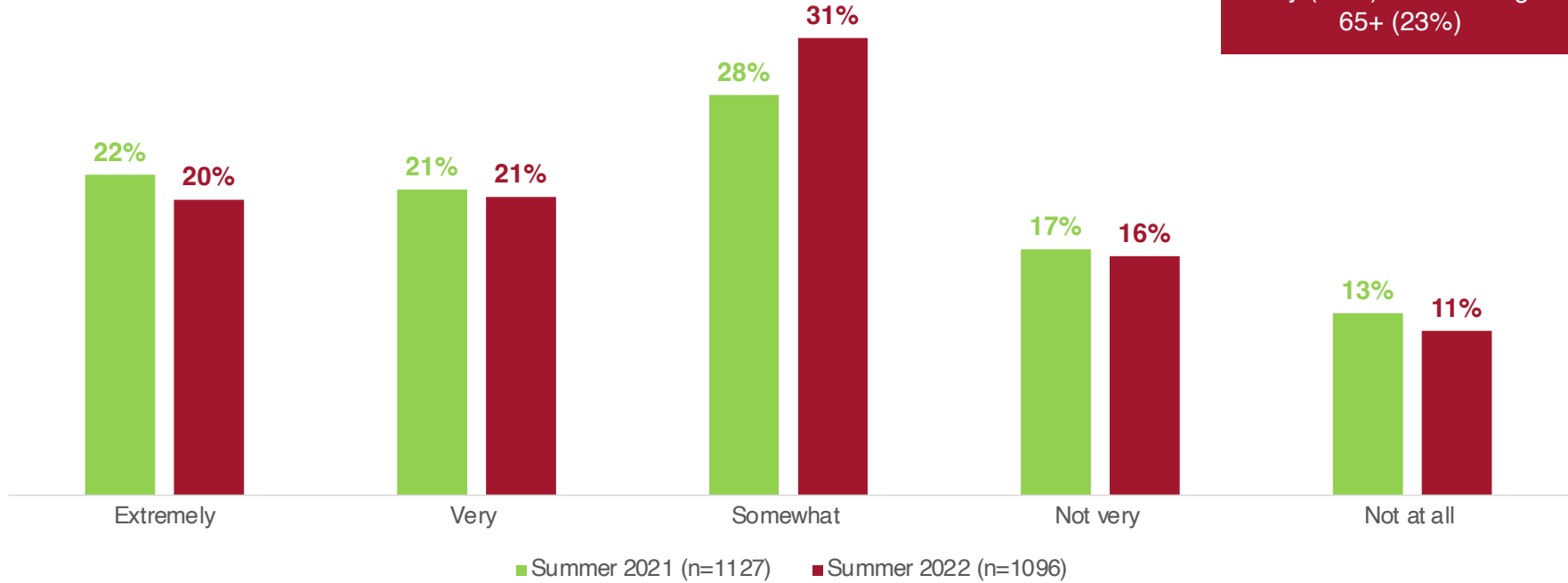
Winter 2021
(n=911)

85%
Plain watermelon

15%
In a recipe

Likelihood to Try New Recipes With Watermelon

Those aged 18-34 are more than twice as likely to say very likely or extremely likely (55%) vs. those aged 65+ (23%)



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 2022
(n=889)

76%
In my home

16%
Outside my home

8%
Restaurant or other food
service location

Summer 2021
(n=902)

76%
In my home

17%
Outside my home

7%
Restaurant or other food
service location

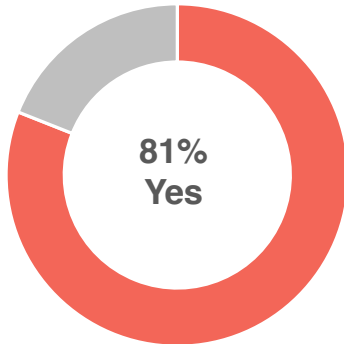
Winter 2021
(n=911)

75%
In my home

17%
Outside my home

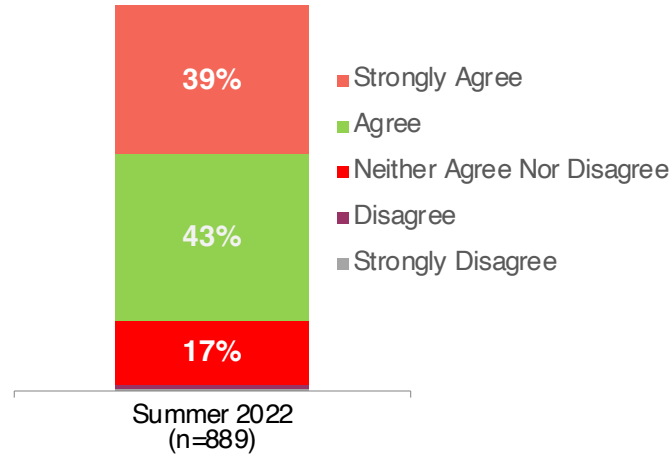
8%
Restaurant or other food
service location

Do You Consider Watermelon A Comfort Food?

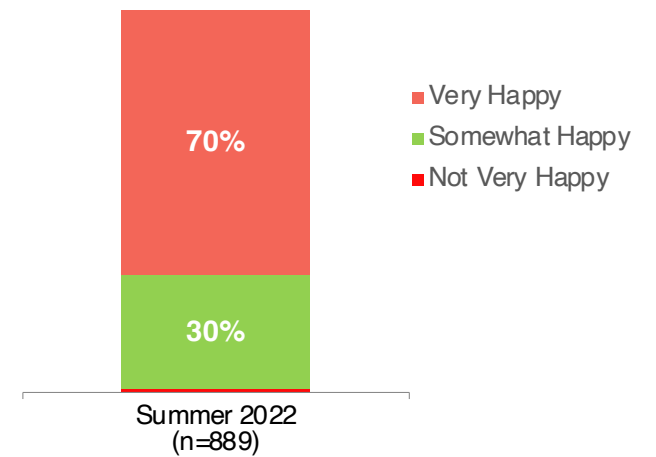


Summer 2022 (n=889)

Does Watermelon Boost Your Mood?



Watermelon Makes Me Feel...













Source: Total Respondents Purchasing Watermelon
 Eating watermelon makes me feel: (very/somewhat/not at all happy)
 How much do you agree or disagree that watermelon boosts your mood?
 Would you consider watermelon a comfort food for you?
 All new questions Summer 2022



**DIFFERENCES
BY AGE**

Percent Of People Who Like The Taste Of...





	18-24	25-34	35-44	45-54	55-64	65+	Total
 Apples	66%	75%	78%	82%	77%	80%	77%
 Bananas	68%	76%	73%	79%	85%	88%	80%
 Blueberries	49%	52%	48%	63%	71%	70%	60%
 Cantaloupe	38%	39%	46%	56%	76%	72%	57%
 Grapes	71%	73%	71%	79%	87%	84%	78%
 Honeydew	24%	34%	37%	49%	61%	56%	46%
 Oranges	60%	69%	73%	77%	76%	76%	73%
 Peaches	43%	55%	57%	65%	77%	81%	66%
 Strawberries	71%	73%	76%	81%	83%	83%	79%
 Watermelon	61%	60%	63%	74%	79%	78%	70%

Source: Total Respondents (n=1096)

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	75%	75%	75%	74%	67%	66%	72%
	Fresh cut	30%	42%	44%	43%	42%	36%	41%
	Mini	29%	27%	29%	24%	28%	32%	29%
	Juice	13%	18%	22%	6%	5%	1%	11%

Source: Total Respondents Purchasing Watermelon (n=889)

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	58%	65%	70%	79%	86%	91%	76%
Outside your home	25%	22%	20%	15%	11%	8%	16%
In a restaurant	17%	13%	10%	6%	3%	2%	8%

Source: Total Respondents Purchasing Watermelon (n=889)
 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	43%	56%	62%	72%	81%	85%	70%
	Low in Fat	24%	30%	33%	45%	56%	63%	44%
Types of information displayed	How to select a good one	37%	48%	47%	51%	56%	66%	53%
Percent that like the taste of...	Watermelon	61%	60%	63%	74%	79%	78%	70%

Source: Total Respondents (n=1096)

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	48%	47%	53%	69%	79%	86%	65%
	Cool/Refreshing/ Hydrating	45%	41%	47%	58%	68%	75%	57%
	In Season	32%	33%	41%	51%	55%	63%	47%
	Good Snack	39%	42%	48%	44%	56%	58%	49%
	Display/Sample	19%	12%	12%	11%	6%	3%	9%

Source: Total Respondents Purchasing Watermelon (n=889)
 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	80%	86%	90%	94%	96%	97%	91%
	Winter	12%	14%	12%	6%	6%	6%	9%
Consumption by percentage of time	Plain	78%	82%	81%	92%	93%	96%	88%
	In a recipe	22%	18%	19%	8%	7%	4%	12%

Source: Total Respondents Purchasing Watermelon (n=889)

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



SURVEY KEY FINDINGS

Survey Key Findings

- Watermelon continues to outperform other melons (cantaloupe and honeydew) on purchase, taste, value, and healthiness. However, consumers like the taste more and purchase apples, bananas, grapes, oranges and strawberries more frequently than watermelon.
 - Bananas, apples, grapes, and strawberries have been purchased by roughly 90% of respondents in the past year, while watermelon has been purchased by 83%.
- Liking the taste is always a key driver of food purchases and is still the main reason consumers buy watermelon. The bulkiness/inconvenience of watermelon as a reason for not purchasing is at a 2 year high (38%).
- While most respondents believe that watermelon is priced where it should be or see it as a bargain, the percentage of those who see it as over-priced or too expensive rose from 17% to 27%, likely due to inflation. This corresponds to a declining number of consumers who cite 'budget friendliness' as a reason for purchasing watermelon.

Survey Key Findings

- 63% 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 continue to be important to consumers.
 - There has been a steady decline in those who blame retailers for food safety issues (36% from a high of 50%).
 - While likelihood to use grocery pick-up/delivery services has dropped since the height of COVID-19, over half of those who have used this service are very likely to continue using, with 76% of those people saying they will continue to use it in the future.
 - There is a steady increase in those who use their mobile device to assist in grocery shopping. Keeping track of their grocery list, obtaining coupons, and finding recipes are the primary functions of consumers' mobile device while shopping.
 - 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 to be presented information on how to pick a good one, as well as the health benefits of watermelons.
 - There has been a steady uptick of those who would like to have watermelon recipes available to them at retail stores. 72% of total respondents are at least somewhat likely to try a new recipe that includes watermelon.

Survey Key Findings

- There continues to be differences by age in several areas.
 - Younger age groups are less likely to like the taste of watermelon (and fruit in general).
 - The number of consumers 18-24 who like the taste of watermelon has increased from 55% to 61% since last year.
 - Younger ages are more likely to consume watermelon in a recipe while older ages are more likely to consume watermelon plain.
 - Consumers 18-34 are over twice as likely as those 65+ (55% vs. 23%) to try a new recipe that includes watermelon.
 - Younger ages are more likely to consume watermelon in a restaurant.
 - Younger age groups are more likely to experience external quality issues while older respondents are more likely to encounter internal appearance issues.



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