



September 2023

WATERMELON A&U RESEARCH

Prepared by



FUSION

Clear Direction For Your Business™



BACKGROUND & OBJECTIVES

The National Watermelon Promotion Board conducted research to uncover insights about watermelon's use and perceptions that will help them identify opportunities to increase demand.

This year's study builds upon learning from previous studies and is focused on better understanding the watermelon buyer to enhance marketing strategies.

Specifically, the research was designed to understand:



WHO THEY ARE

Learn more about their personalities and general attitudes about life



WHAT THEY THINK

How do they view watermelon, why do they eat it and what are the benefits and concerns?



HOW THEY BEHAVE

How do they consume watermelon, on what occasions, in what dishes?



HOW TO GET THEM TO BUY MORE

What are the current barriers & what would entice them to buy watermelon more often?



METHODOLOGY



15-MINUTE ONLINE SURVEY

QUALIFICATIONS:

- Ages 18+
- Females 53% / Males 47%*
- Census distribution of age, income, region, ethnicity
- Responsible for at least half of grocery shopping
- Purchased watermelon in the past 6 months

n=805
RESPONDENTS

*Respondents recruited from
a nationally representative
online consumer panel.*



47%*
of adults 18+
purchased
watermelon in
the past
6 months



**Incidence of qualifying*



** Gender was set to match previous studies*

STAT TESTING KEY

A - Capital letters indicated a statistically significant difference at the 95% percent level of confidence vs. the cell with the corresponding letter.
a - Lower case letters indicated a statistically significant difference at the 90% percent level of confidence vs. the cell with the corresponding letter.

KEY ACTIONS AND OPPORTUNITIES

Engage and Educate Watermelon Consumers To Stimulate Cravings



Engage With Watermelon Consumers

1. Share recipes to drive usage
2. Drive impulse purchases by employing in-store messaging and sampling
3. Create experiences for younger consumers



Educate Watermelon Consumers

1. Promote the health benefits of watermelon
2. Educate consumers on the full nutritional benefits of watermelon
3. Provide techniques to gauge quality



Stimulate Cravings for Watermelon

1. Tap into feelings of comfort, nostalgia, and happiness
2. Promote watermelon as a healthy way to satisfy sweet cravings
3. Increase eating occasions for watermelon

ENGAGE WITH CONSUMERS TO CAPTURE ATTENTION

Creating key points of engagement with watermelon consumers is vital to attracting new users to the watermelon category and driving repeat usage among existing consumers. Three out of 4 users seek new information about the category, and many are open to new ways to use watermelon.



Share recipes to drive usage

- Watermelon consumers are open to new and exciting ways to prepare and enjoy watermelon.
- Of surveyed consumers, 43% stated they were more likely to try a new recipe if it includes watermelon.
- Among younger consumers (18 - 34), this trend was even more prevalent (69%).



Drive impulse purchases by employing in-store signage and sampling

- Of surveyed consumers, 41% said their last purchase was on impulse.
- Engage with shoppers in-store with enticing point of purchase messaging or in-store sampling to drive cravings and impulse purchases.
- Providing a scannable QR code in-store can offer information that shoppers are seeking about watermelon.



Create experiences for younger consumers

- Many watermelon consumers feel that experiences are more important than things.
- This sentiment is especially prevalent among younger consumers (80% agree).
- Provide online resources for marketers and retailers to create new and exciting opportunities for social experiences with watermelon, such as cooking demonstrations or watermelon carvings.

EDUCATE CONSUMERS TO INCREASE ENGAGEMENT

Build awareness of the health and nutritional benefits of watermelon and teach techniques to gauge quality to increase engagement with the watermelon consumer. Many search for information about watermelon across digital platforms. Among those who seek information, 69% turn to search engines (e.g. Google), 35% use health and wellness publications or apps, and 29% consult with health professionals to learn more about watermelon.



Promote the health benefits of watermelon

- Among consumers who seek information, 53% specified they searched for the health benefits of watermelon.
- Nearly 80% of watermelon consumers said they would be more likely to buy watermelon knowing that it was good for hydration and promotes healthy blood flow*.



Educate consumers on the nutritional benefits of watermelon

- More than half of watermelon consumers said that they believe watermelon is healthy and nutritious but may not know the full nutritional benefits.
- One out of three watermelon consumers said that they would be a lot more likely to buy watermelon if they knew that it was a source of vitamin B6, vitamin A, etc.



Provide techniques to gauge quality

- More than half (53%) of information-seeking watermelon consumers want to learn how to choose a good watermelon.
- Nine out of ten watermelon consumers said they would be more likely to buy a watermelon if it is ripe and ready to eat.

*For more on heart health: <https://www.watermelon.org/nutrition/watermelons-benefit>

STIMULATE CONSUMERS' CRAVING FOR WATERMELON

"I had a craving" was the top purchase driver among watermelon consumers. In fact, nearly 9 out of 10 consumers agree that watermelon satisfies their craving for something sweet. Engaging with and educating watermelon consumers on usage and the health benefits of watermelon could increase interest and eating occasions to create more opportunities for them to develop a craving for the fruit.



Tap into feelings of comfort, nostalgia, and happiness

- Nearly 8 out of 10 consumers agree that watermelon is comforting and 7 out of 10 consumers said that watermelon makes them feel nostalgic.
- These feelings elevate their mood and can positively impact their happiness.
- Marketing tactics that tap into these feelings can create opportunities for them to develop a craving for the fruit.



Promote watermelon as a healthy way to satisfy sweet cravings

- Watermelon is a guilt-free, healthy way for consumers to satisfy their sweet tooth.
- Four out of five watermelon consumers are not extremely/very concerned about the sugar content.
- Most consumers also find watermelon to be a refreshing fruit that is safe to eat.



Increase eating occasions for watermelon

- Nearly 9 out of 10 watermelon consumers eat watermelon as a snack, while half eat watermelon as a dessert.
- Nearly 7 out of 10 consumers enjoy being creative in the kitchen or cook for fun once per week.
- Leverage this opportunity by providing videos or blogs of unique recipes to help broaden usage across various eating occasions.

SHOPPING JOURNEY

CRAVING TRIGGERS



Feelings of

- Comfort
- Refreshment
- Nostalgia
- Happiness

Perceptions of

- Nutrition
- Safe to eat
- Health
- Good source of hydration



POTENTIAL IN-STORE BARRIERS

- Availability
- Choosing a good one
- Size (Ability to finish before it spoils)
- Ability to gauge quality

*Price is not
a strong
barrier*



ENJOYED AS



A SNACK



A close-up photograph of several triangular slices of watermelon with bright red flesh and green rinds, arranged on a light-colored wooden cutting board. A wooden watermelon knife is visible in the background. A dark green rectangular box is overlaid on the center of the image, containing a white circle with the number '1' and a white title.

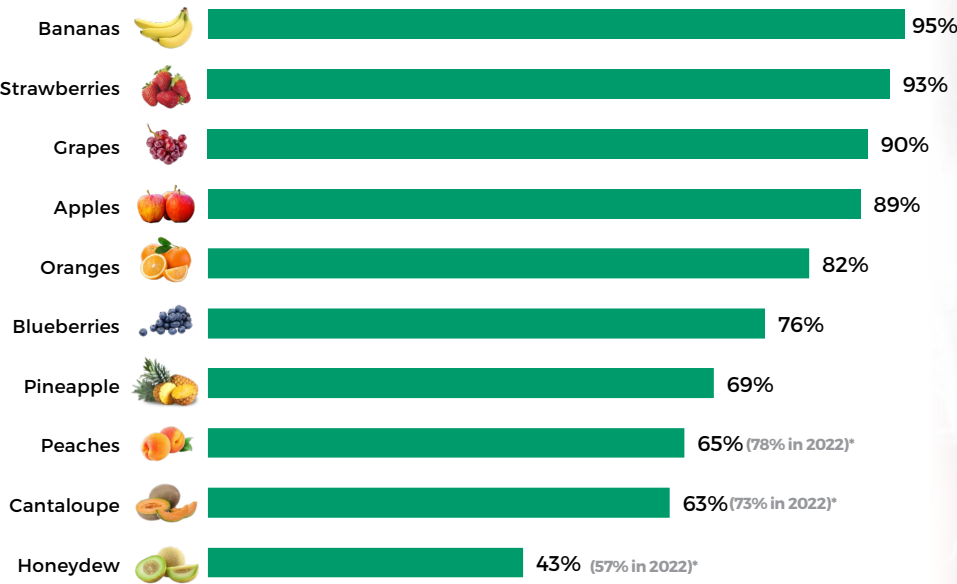
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Watermelon Purchase and Usage Dynamics



Watermelon Buyers tend to buy a wide variety of fresh fruit.

Fruit Purchased in Past 6 Months



*12 months was asked in 2022. These fruits are comparable for 12 months
All other comparable for past 6 months.



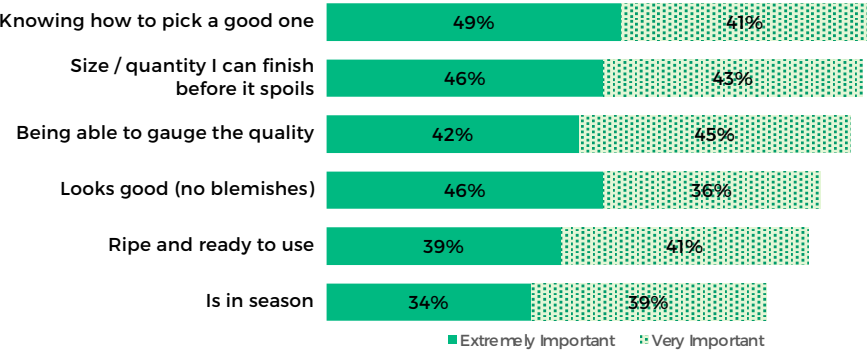
IMPORTANT CHOICE FACTORS



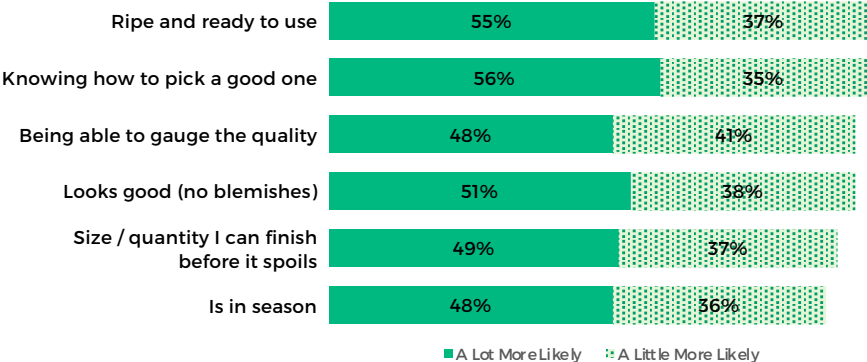
Knowing how to pick out a good fruit tops the list when buying fresh fruit, but being ripe and ready to use is more influential for watermelon than fruit in general.



Choosing Fresh Fruit (% Extremely/Very Important)



Impact Likelihood to Buy Watermelon (% A Lot/Little More Likely)

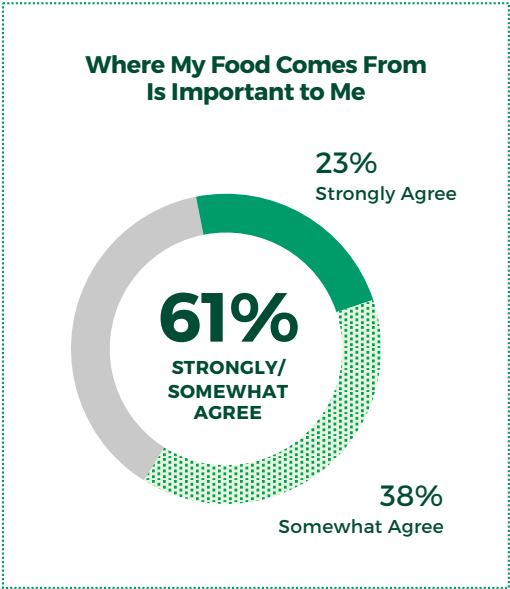
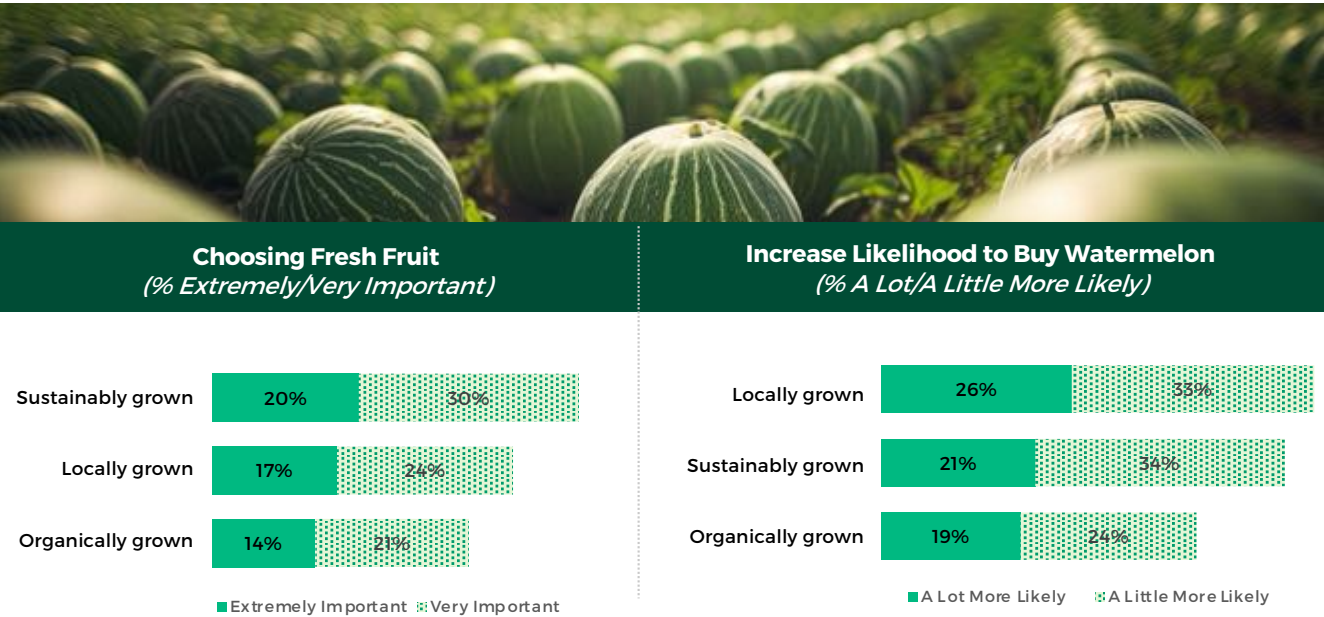


Base: Total Watermelon Purchasers n=805
QF1. How important are each of the following when choosing fresh fruit?
QS1. How much does each of the following impact your decision whether or not to buy a watermelon?

LESS IMPORTANT CHOICE FACTORS



For 1 out of 5 watermelon buyers, where and how fruit is grown, including watermelon, strongly impacts the decision of whether or not to buy.

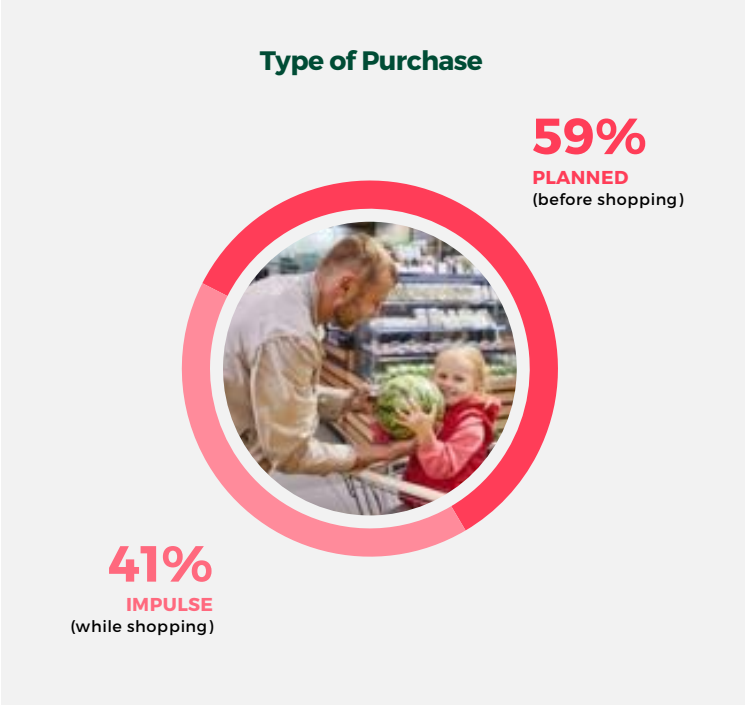


Base: Total Watermelon Purchasers n=805, Summer 2022 Total Respondents n=1096
QF1. How important are each of the following when choosing fresh fruit?
QS1. How much does each of the following impact your decision whether or not to buy a watermelon?
QC1. How much do you agree or disagree with the following statements about food and cooking?

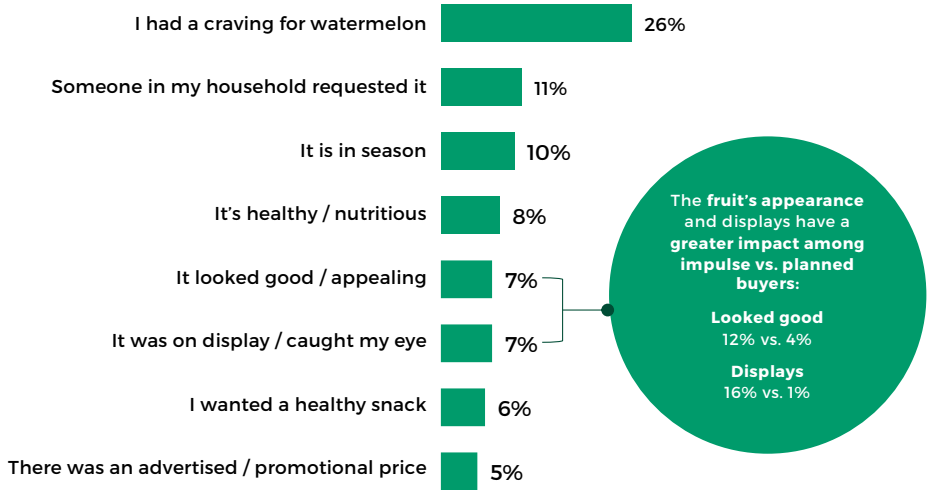
Summer 2022 - Question asked differently: feel better when purchase food that is... organic 21%, locally grown 36%, sustainably grown 18%



Watermelon is a planned purchase for the majority of buyers. However, craving is the top reason for buying watermelon whether the decision was planned before or during shopping.



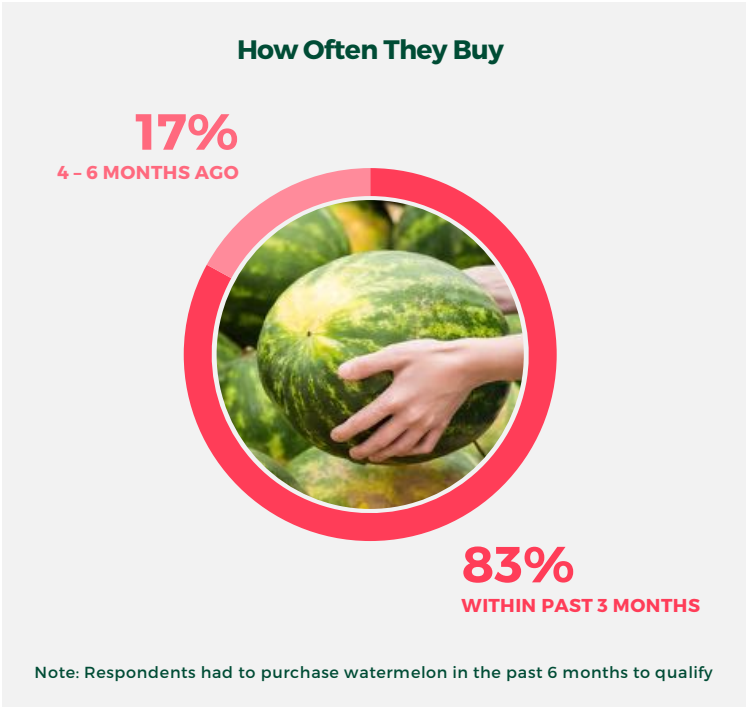
Reason Purchased



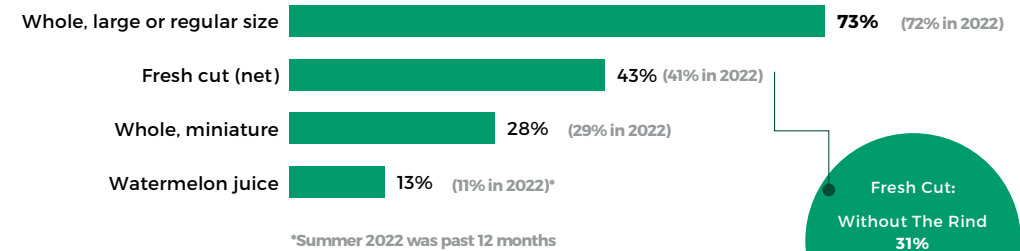
Base: Total Watermelon Purchasers n=805, Planned Buyers n=474, Impulse Buyers n=331
QS3. Thinking specifically of the last time you purchased fresh watermelon, what was the main reason you decided to buy watermelon on that purchase occasion?
QS4. Thinking again about the last time you purchased watermelon did you....



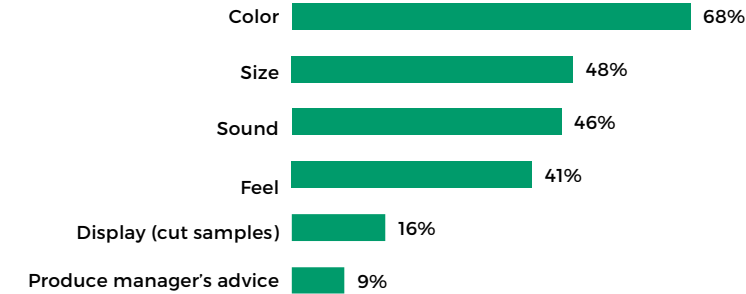
Large, whole watermelons are the most common form purchased and buyers primarily choose a watermelon based on the color. However, a sizeable group also buy fresh cut.



What They Buy



How They Choose



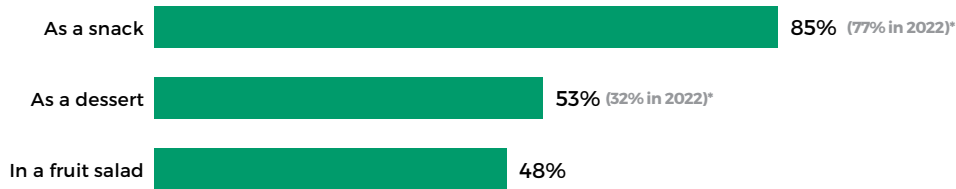
Base: Total Watermelon Purchasers n=805, Summer 2022 Total Watermelon Purchasers n=889
Q1. You mentioned you purchased fresh fruit, how recently have you purchased each of the following?
QS4B. Which of the following do you rely on to choose a good watermelon?
QS5. Which of the following types of watermelon have you purchased in the past 6 months?



There is an opportunity to broaden the ways people eat watermelon.
While it is consumed by everyone in the household, it is seen primarily as a snack.

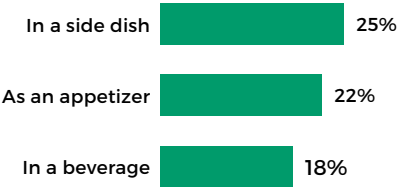
Watermelon Is Eaten...

TOP USES:

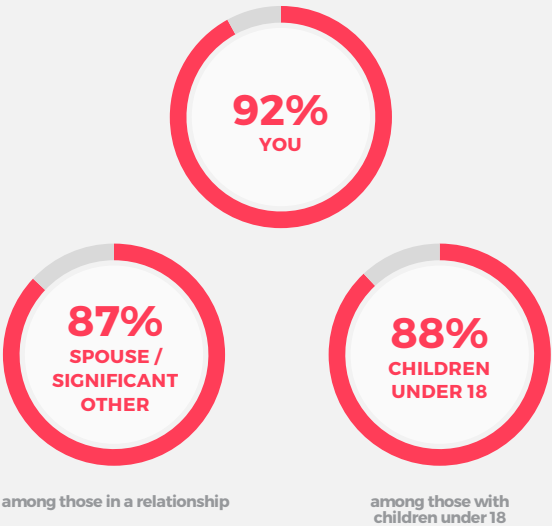


*In Summer 2022 question was asked as time of day with other meals

ADDITIONAL USES:



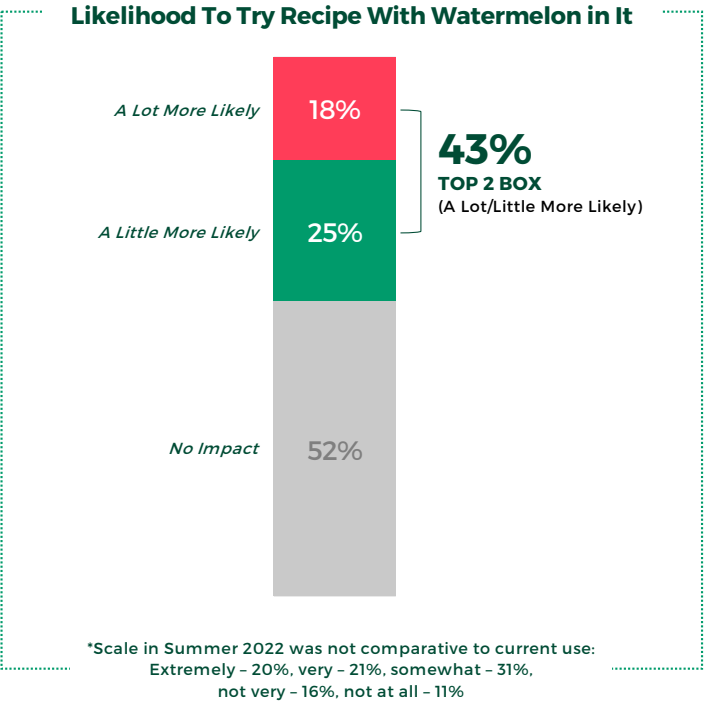
Who Eats Watermelon



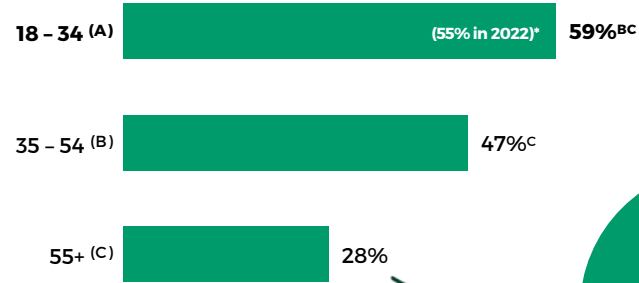
Base: Total Watermelon Purchasers n=805, Summer 2022 Total Watermelon Purchasers n=889
QU1. In what ways do you serve/eat watermelon?
QU2. Who in your household eats watermelon?



Inclusion of watermelon in a recipe increases likelihood to try it, particularly among younger purchasers.



Younger respondents are more likely to try a recipe if it has watermelon in it



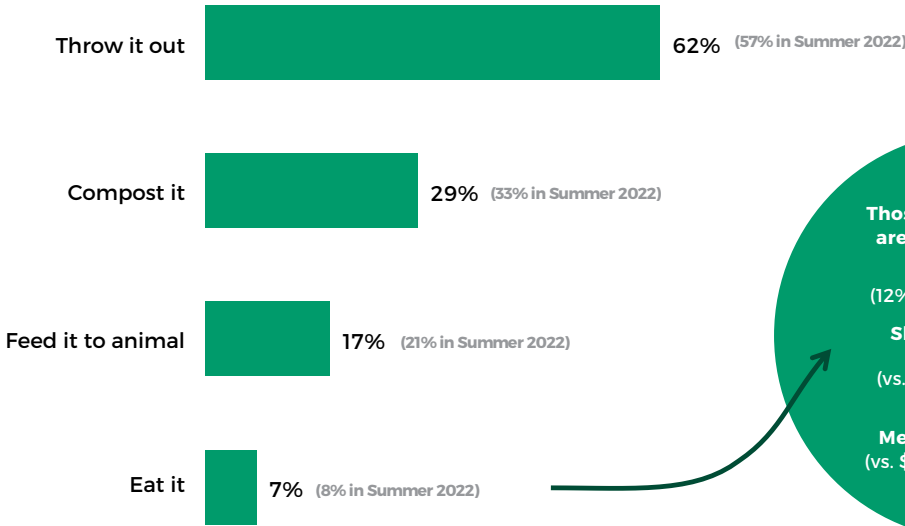
HYPOTHESIS:
Older respondents may be set in their ways and happy with their current recipes in general

Base: Total Watermelon Purchasers n=805, Age 18-34 n=227, 35-54 n=274, 55+ n=304
QU3. How much does the inclusion of watermelon as an ingredient impact your likelihood to try a new recipe?



Only a small minority of watermelon buyers eat the rind.
Those who do are more likely to be male, younger and more affluent.

What They Do With the Rind



Those who eat the rind are more likely to be:

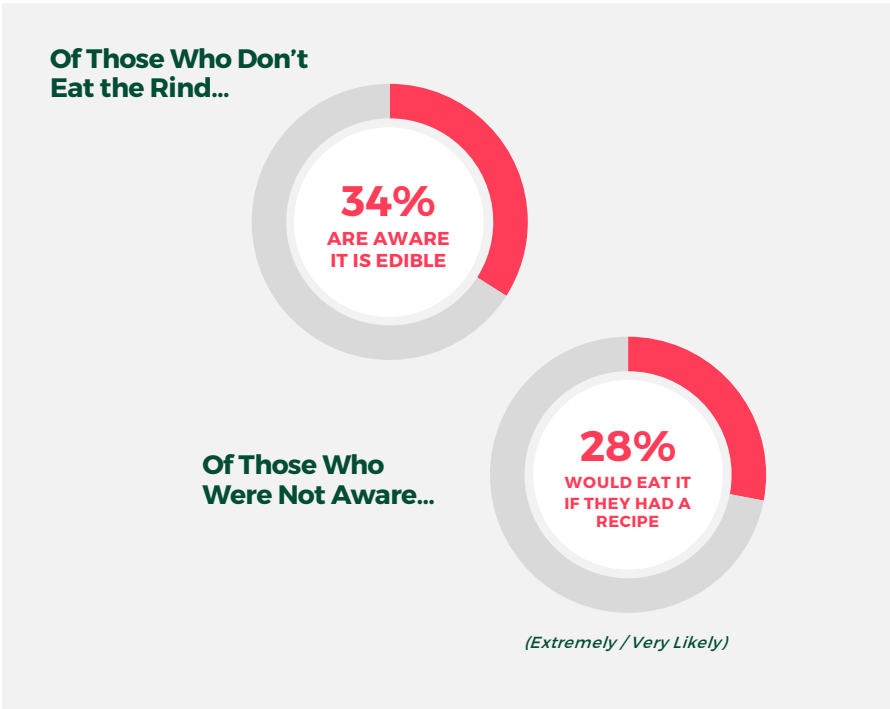
- Male**
(12% vs. 3% of females)
- Slightly Younger - Mean age: 37**
(vs. 48 for non-eaters)
- More affluent - Mean Income: \$108k**
(vs. \$68k for non-eaters)



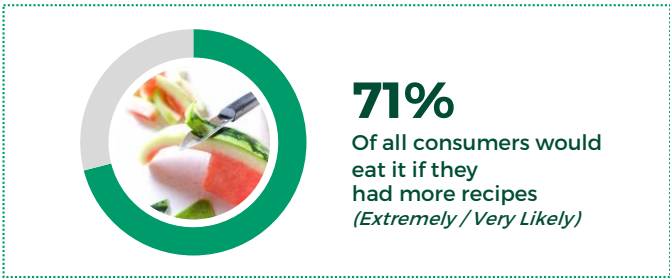
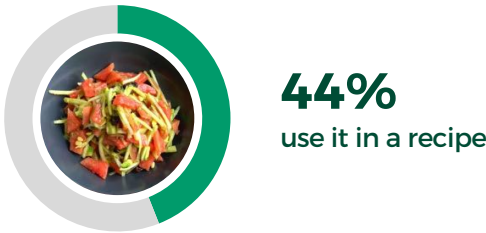
Base: Total Watermelon Purchasers n=805, Eat the rind n=59, Summer 2022 Whole/Mini Watermelon Purchasers n=761
QR1. What do you do with the watermelon rind?



Providing recipe ideas to use the rind would increase the likelihood of eating it, especially among those who already eat it.



Of Those Who Eat the Rind...

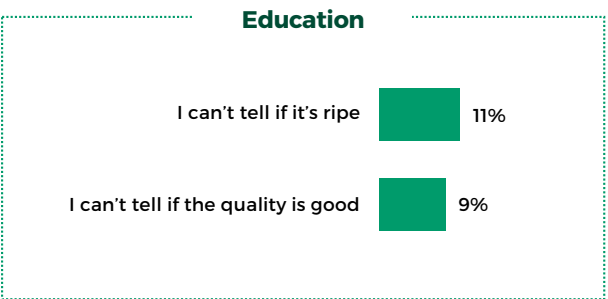
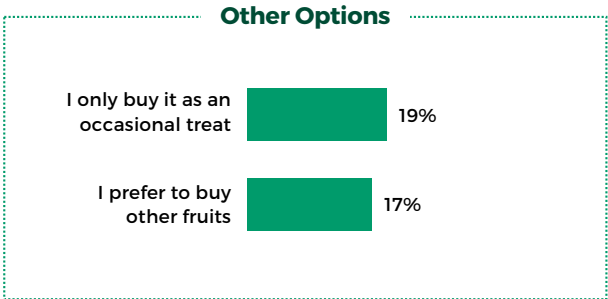
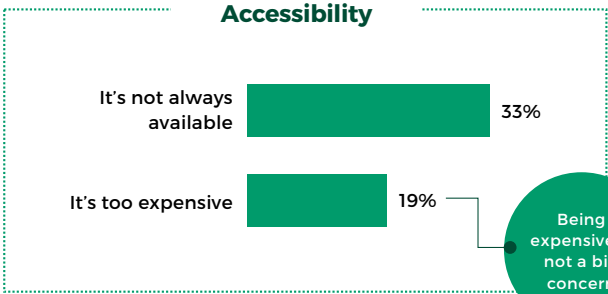


Note: Total aware including those who eat it is 39% on par with 2022 (40%)

Base: Eat the rind n=59, Don't eat the rind n=746, Unaware rind is edible n=492, Summer 2022 Total Respondents n=1096
QR1. What do you do with the watermelon rind? QR2. Did you know that the watermelon rind is edible?
QR3. The rind is in fact, edible. If you had recipes that included the rind how likely would you be to eat the rind in the future : If you had recipes that included the rind how likely would you be to eat the rind?



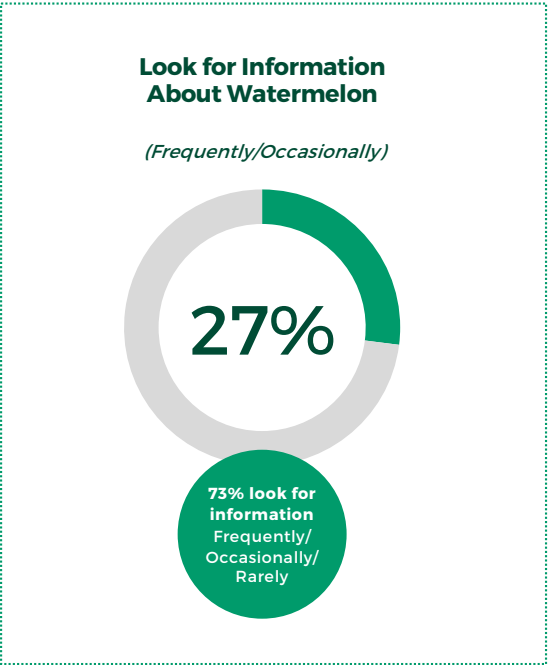
Availability is the #1 barrier to purchase.
Educating consumers about selecting a watermelon could encourage additional purchases.



Base: Total Watermelon Purchasers n=805
QS6. Why don't you buy watermelon more often?



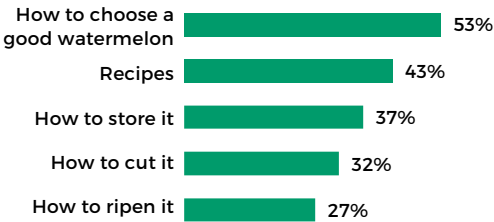
Many watermelon buyers have searched for information about watermelon. Those who frequently/occasionally look primarily turn to search engines and want guidance on choosing a watermelon and health benefits.



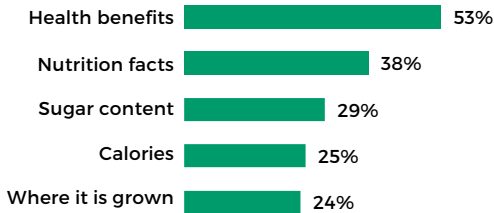
Base Total Watermelon Purchasers n=805, Look for information n=217
Q11. How often do you look for information about watermelon?

Type of Information
(Among those who search Frequently/Occasionally)

SELECTING / USE ADVICE

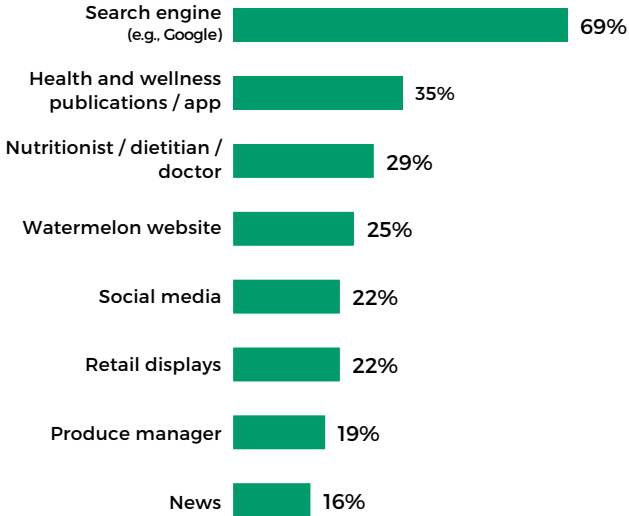


HEALTH / NUTRITION



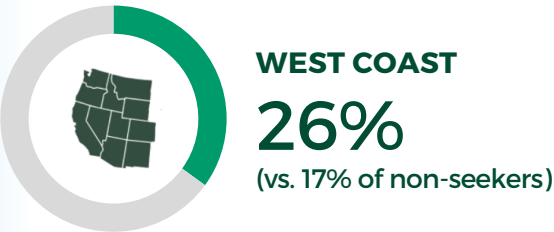
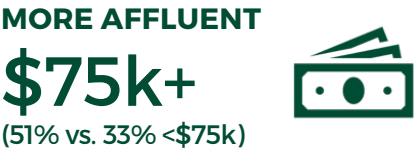
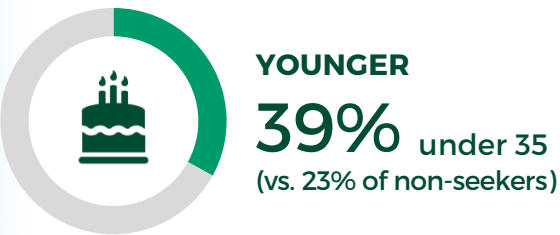
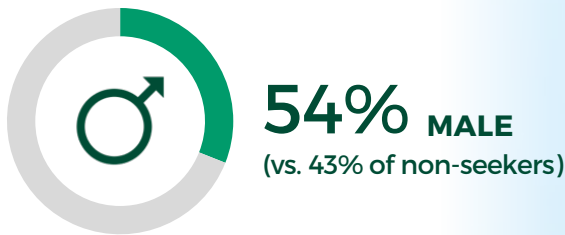
Q12. What type of information do you look for about watermelon?
Q13. Where do you get information about watermelon?

Information Source
(Among those who search Frequently/Occasionally)





Those who look for information are more likely to be:

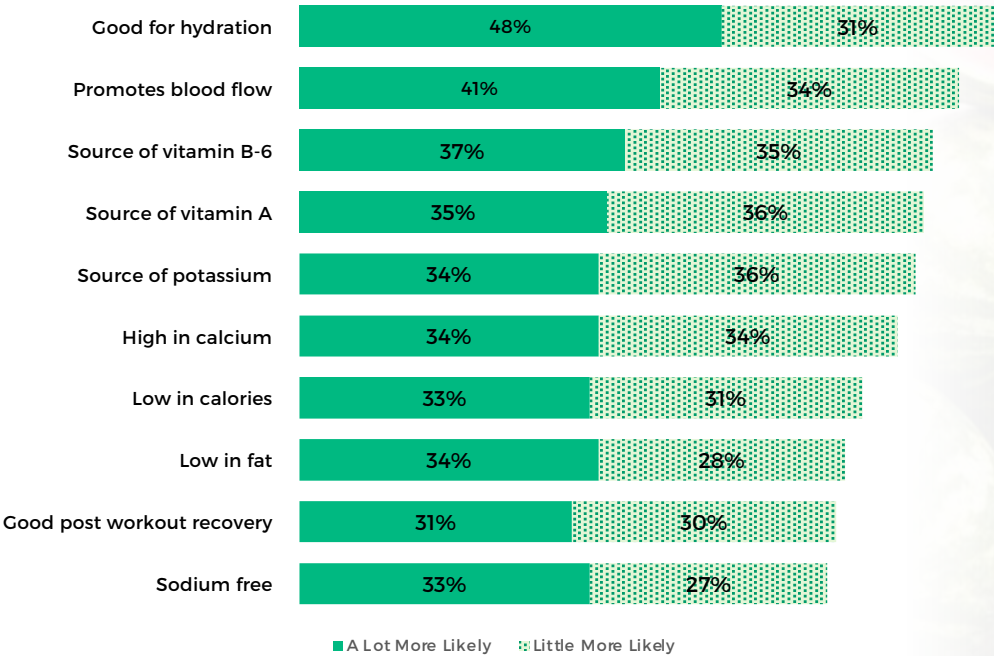


Base: Look for information n=217, Rarely/never look for information n=588
Q11. How often do you look for information about watermelon?



With half of watermelon consumers seeking information about health benefits, communicating health and nutritional information could increase the likelihood to buy watermelon, especially hydration and blood flow.

A Lot / Little More Likely To Buy...



Base Total Watermelon Purchasers n=805
Q14. What impact, if any, does the following nutritional information about watermelon have on your likelihood to buy watermelon?

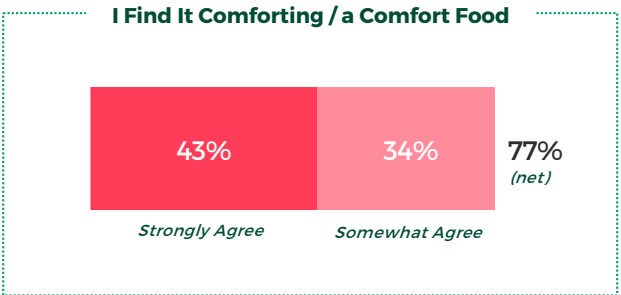
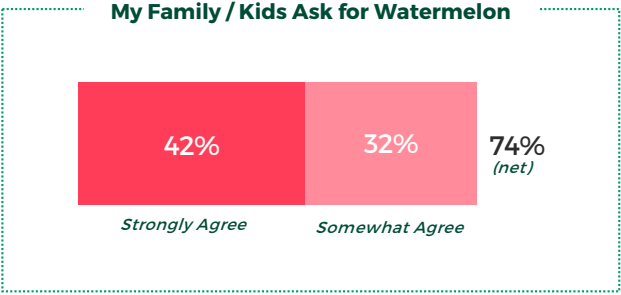
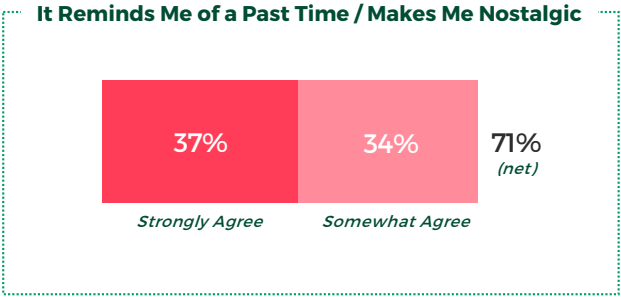
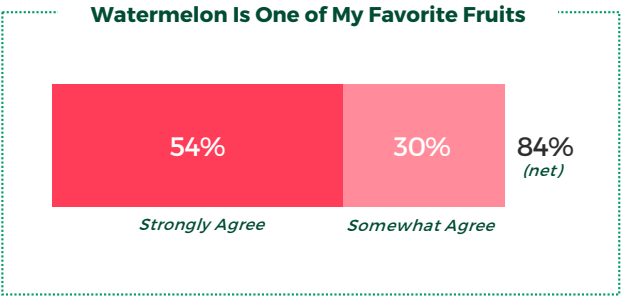
A blurred background image of a person with long brown hair eating a slice of watermelon. The person's hands are visible holding the slice. The background is out of focus, showing warm indoor lighting.

2

Perceptions of Watermelon



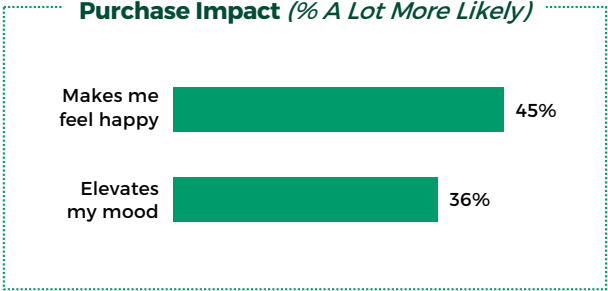
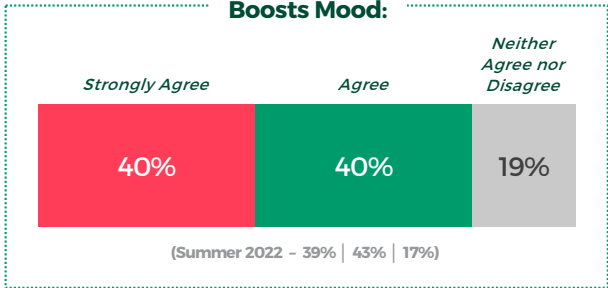
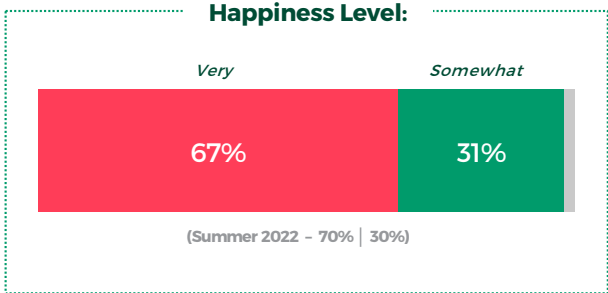
Watermelon is a household favorite and evokes nostalgic, comforting feelings.



Base Total Watermelon Purchasers n=805
QS2. How much do you agree or disagree that each statement describes watermelon?



Watermelon makes people happy and boosts their mood which can positively impact purchase likelihood, but it is not typically the primary reason for buying it.

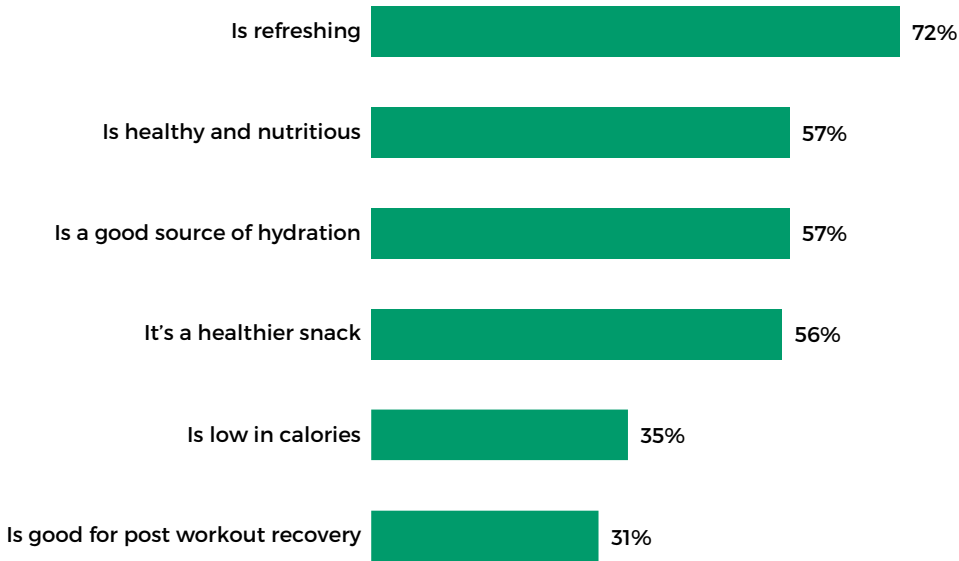


Base: Total Watermelon Purchasers n=805, Summer 2022 Total Watermelon Purchasers n=889
QS5a. Eating watermelon makes me feel:
QS5b. How much do you agree or disagree that watermelon boosts your mood?
QS1. How much does each of the following impact your decision whether or not to buy a watermelon?
QS3. Thinking specifically of the last time you purchased fresh watermelon, what was the main reason you decided to buy watermelon on that purchase occasion?



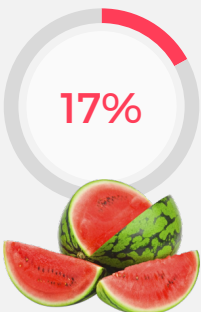
Watermelon is viewed as having numerous health benefits and the calorie content is less of a concern.

Describes Watermelon... (% Strongly Agree)



Calories Are Less of a Concern for Watermelon

CALORIE CONTENT
(% Extremely / Very Concerned)



WATERMELON

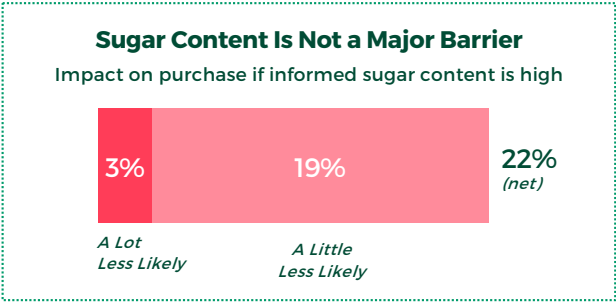
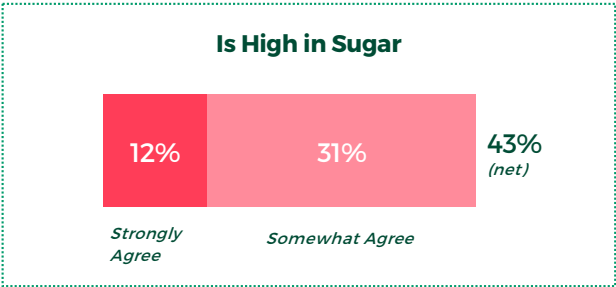
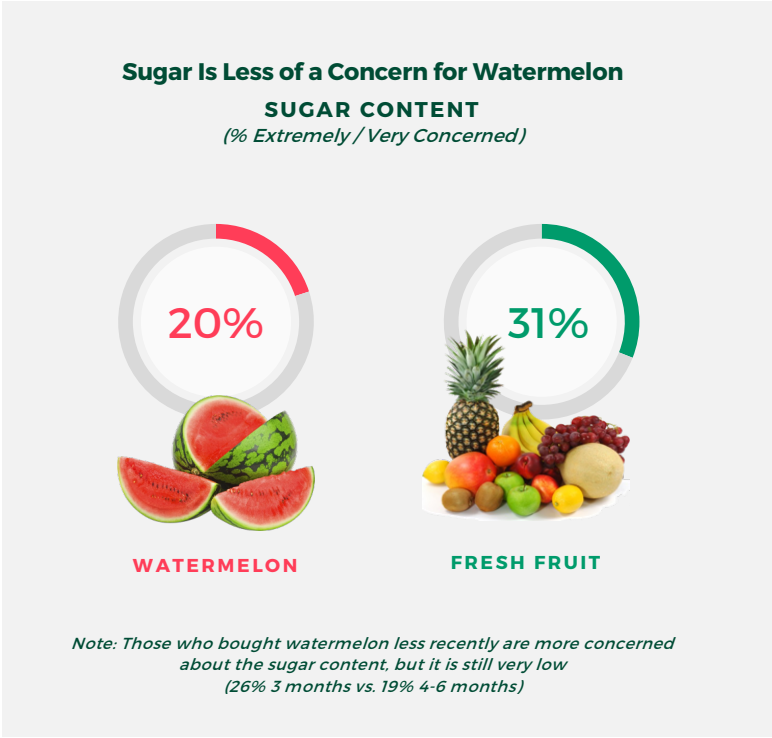


FRESH FRUIT

Base: Total Watermelon Purchasers n=805
QS2. How much do you agree or disagree that each statement describes watermelon?
QS7. When buying watermelon, how concerned are you about each of the following:
QF2. When buying fresh fruit, how concerned are you about each of the following:



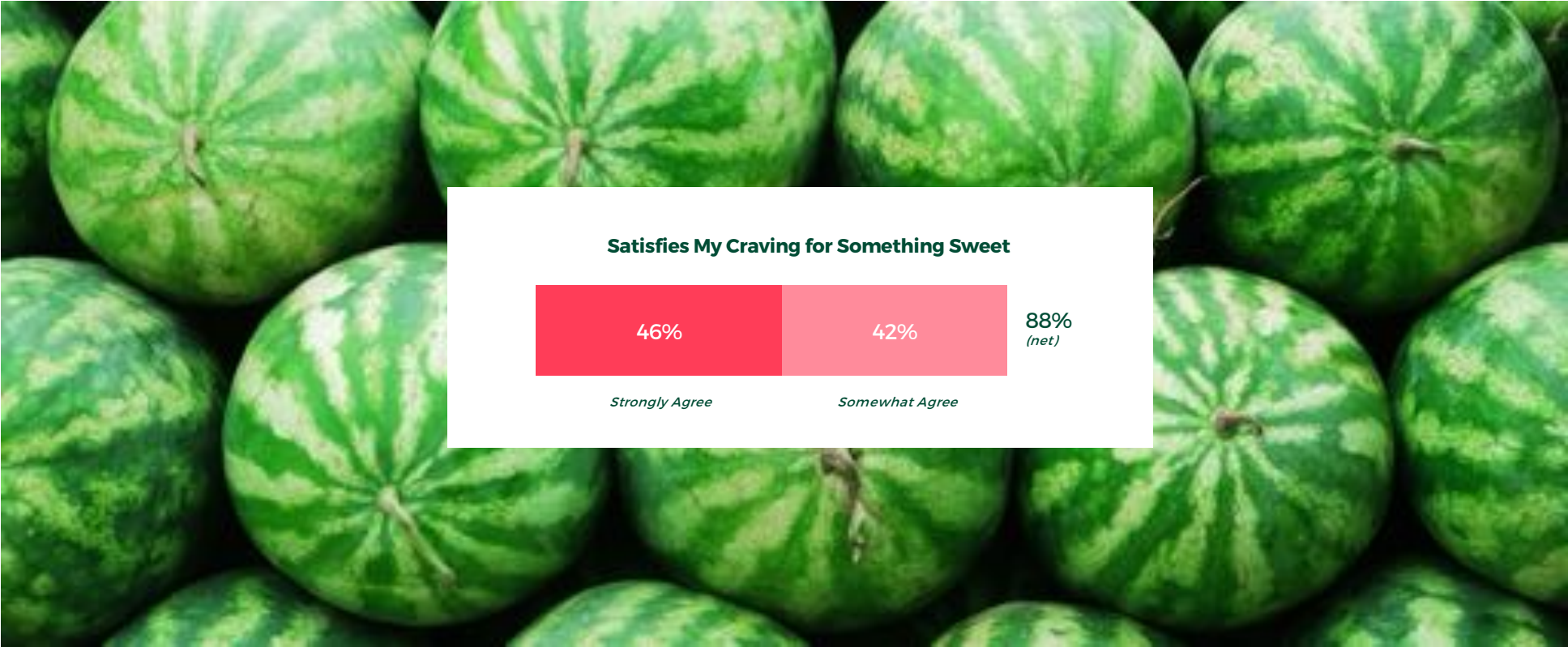
While some believe that watermelon is high in sugar, it is less of a concern than for fruit in general and is not a major barrier to purchasing watermelon.



Base: Total Watermelon Purchasers n=805, Bought past 3 months n=670, Bought past 4-6 months n=135
QS7. When buying watermelon, how concerned are you about each of the following: QS2. How much do you agree or disagree that each statement describes watermelon?
QF2. When buying fresh fruit, how concerned are you about each of the following: QI4. What impact, if any, does the following nutritional information about watermelon have on your likelihood to buy watermelon?



In fact, they enjoy eating watermelon to satisfy their sweet tooth.

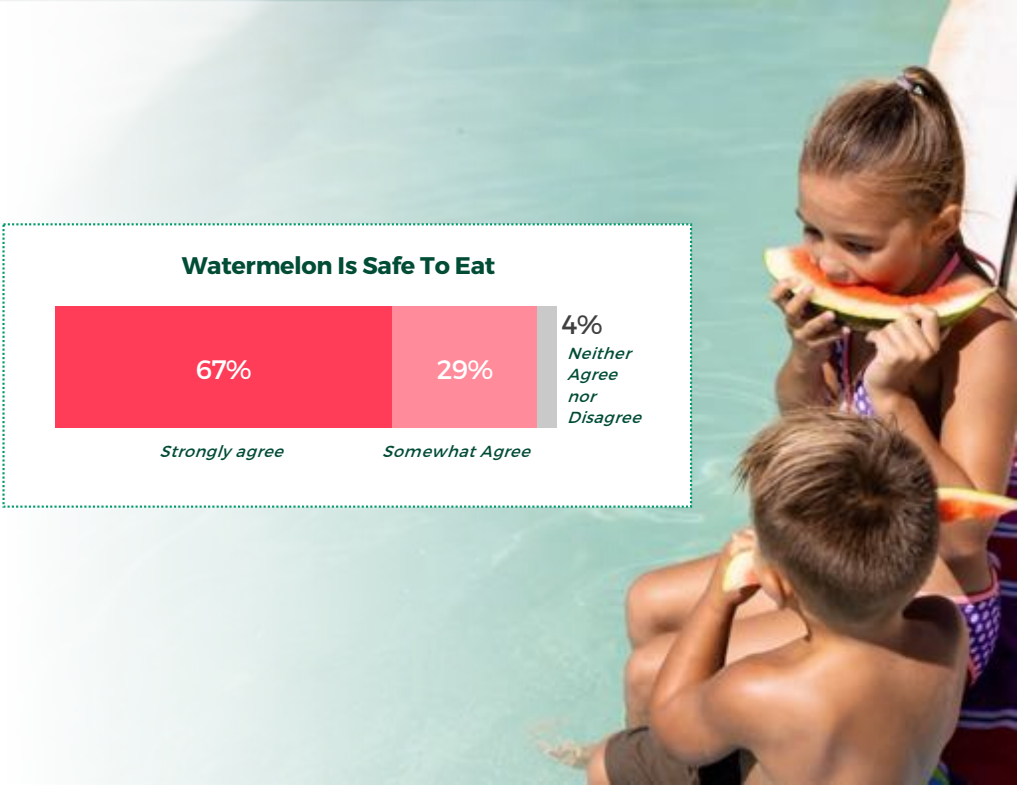
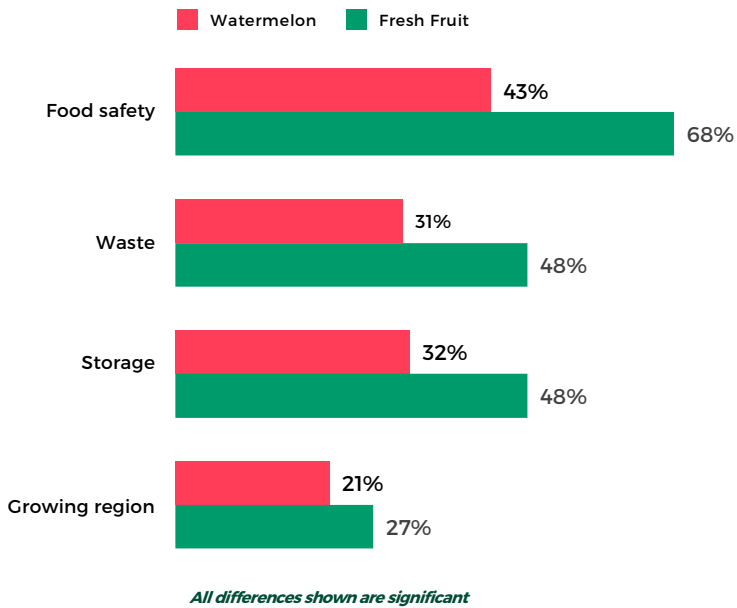


Base Total Watermelon Purchasers n=805
QS2. How much do you agree or disagree that each statement describes watermelon?



Watermelon purchasers have fewer concerns about buying watermelon than fresh fruit in general. Most watermelon consumers agree that it is safe to eat.

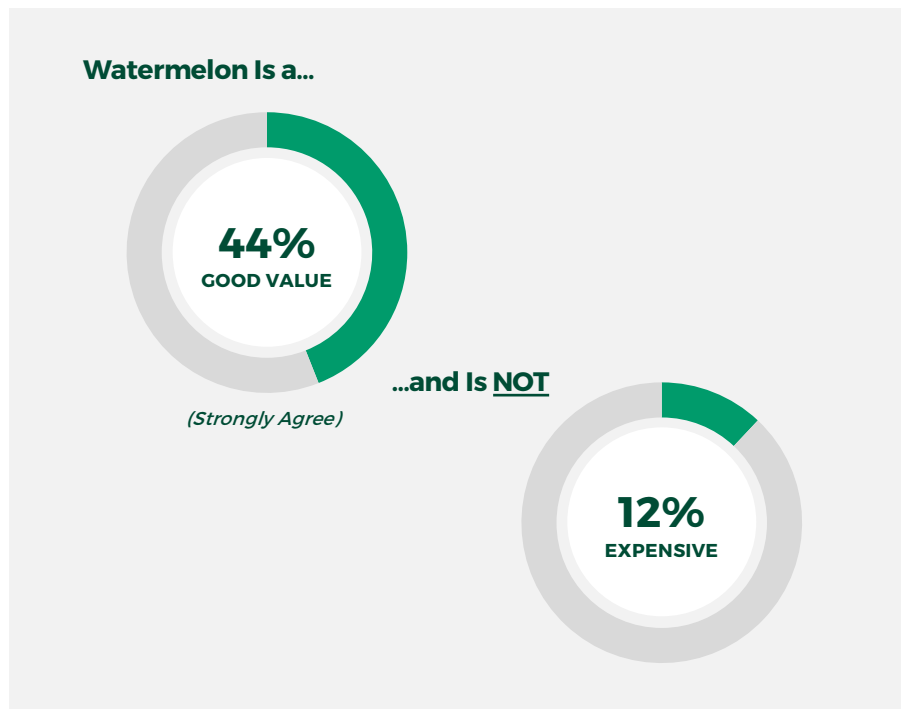
Extremely / Very Concerned...



Base: Total Watermelon Purchasers n=805
QS7. When buying watermelon, how concerned are you about each of the following:
QF2. When buying fresh fruit, how concerned are you about each of the following:
QS2. How much do you agree or disagree that each statement describes watermelon?



Cost is not an issue for watermelon and buyers are not price sensitive, but a coupon does have potential to increase purchases.



Base: Total Watermelon Purchasers n=805

QS1. How much does each of the following impact your decision whether or not to buy a watermelon?

QS2. How much do you agree or disagree that each statement describes watermelon?

QH1. First, we would like to learn about your attitudes about health and nutrition. How much do you agree or disagree with the following statements?

A background image of a market stall with watermelons. A person's hand is visible in the foreground, touching one of the watermelons. The stall has wooden shelves and other produce in the background.

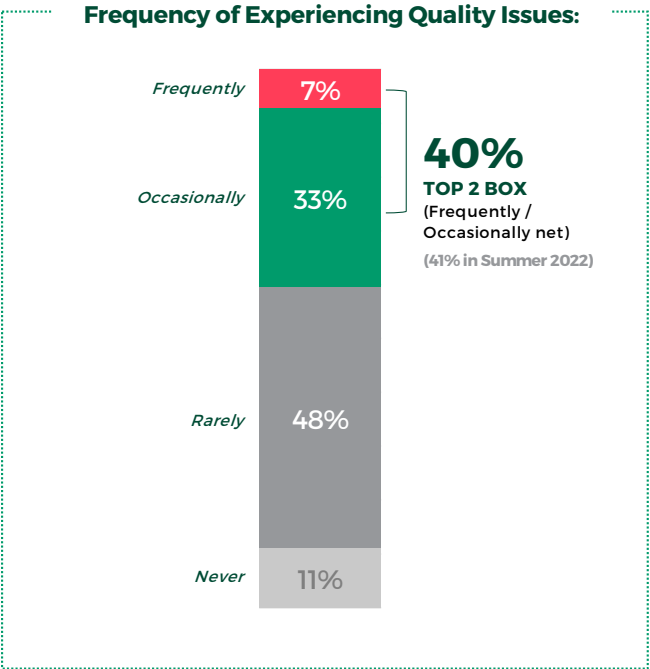
3

Understanding the Watermelon Buyer

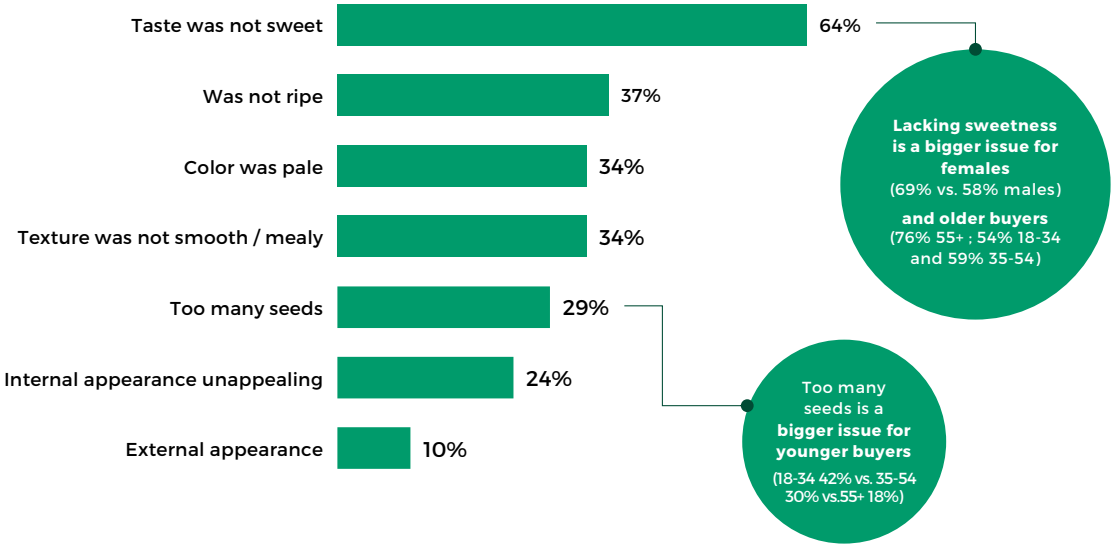
QUALITY ISSUES



Most watermelon consumers have encountered an issue with watermelon quality; 40% frequently or occasionally encountered issues. The most common problem is lack of sweetness, especially among older buyers.



Quality Issues Experienced:

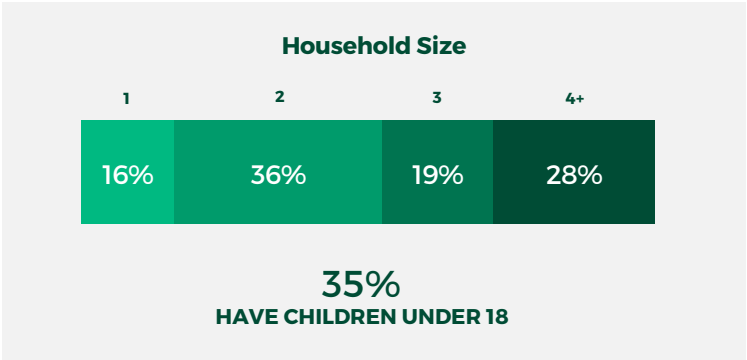
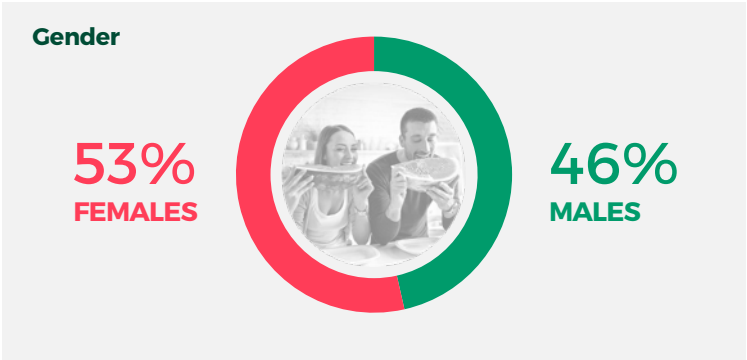


Responses were similar to Summer 2022 despite wording differences:
Taste (unspecified) 70%, texture (unspecified) 40%, internal appearance 28%, external appearance 22%

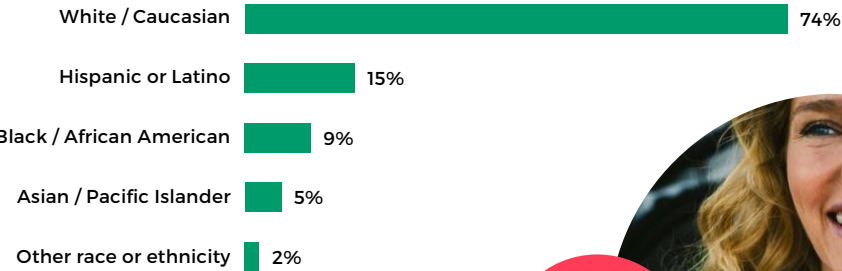
Base: Total Watermelon Purchasers n=805, Had a quality issue frequently/occasionally n=323, Summer 2022 Total reporting a quality issue n=368
QU4. Have you ever had a problem with the quality of the watermelon you purchased?
QU5. Which of the following describes the issue(s) you had with the quality of the watermelon you bought?



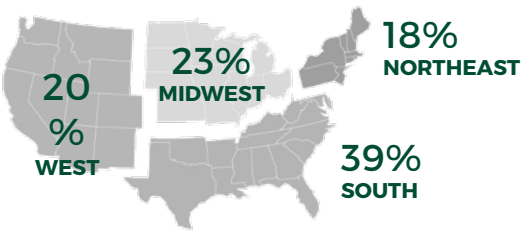
Watermelon buyers are typically Caucasian with about one-third of households having children.



Ethnicity

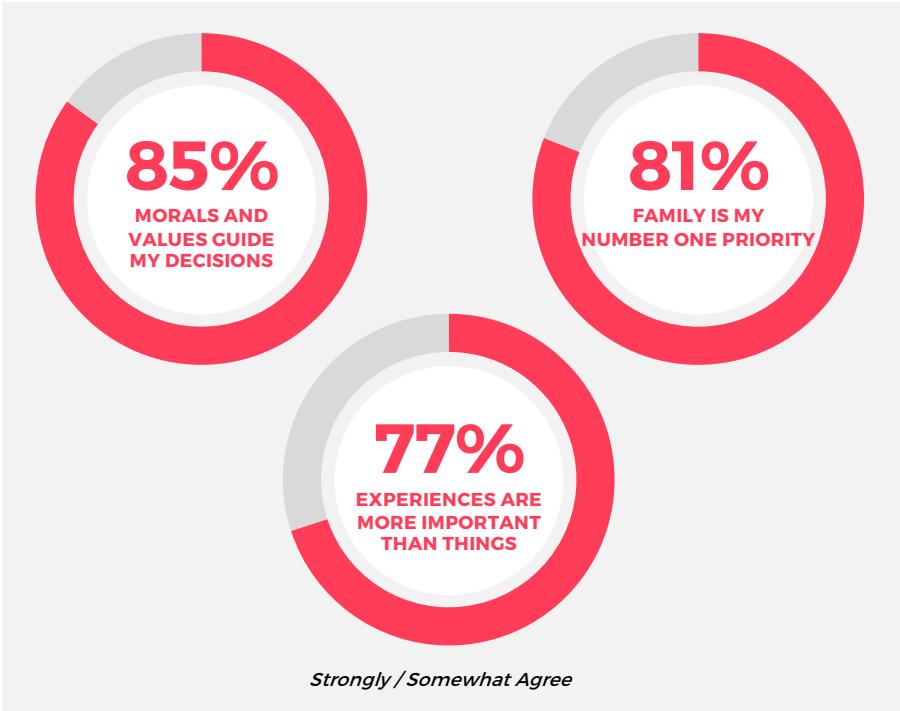


Region





Watermelon buyers are very family oriented and view themselves as average and mainstream.



Describe Themselves As... *(Perfectly/A Lot Better/A Little Better)*

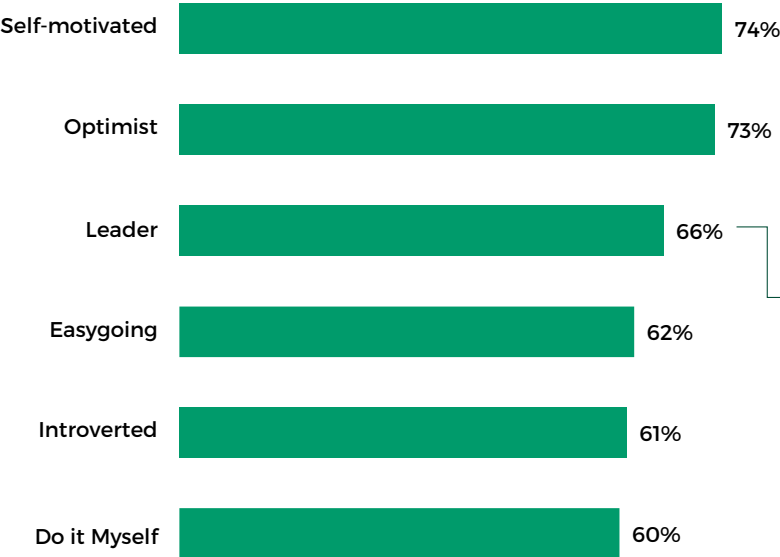


Base Total Watermelon Purchasers n=805
QP3. How much do you agree or disagree with the following statements?
QP1. How would you describe yourself/your preferences? For each pair of words, please choose the point on the scale that you feel best describes you. If you feel one of the words in each pair describes those feelings perfectly, then please choose the box closest to that word. If neither word describes you perfectly, please choose somewhere in the middle.

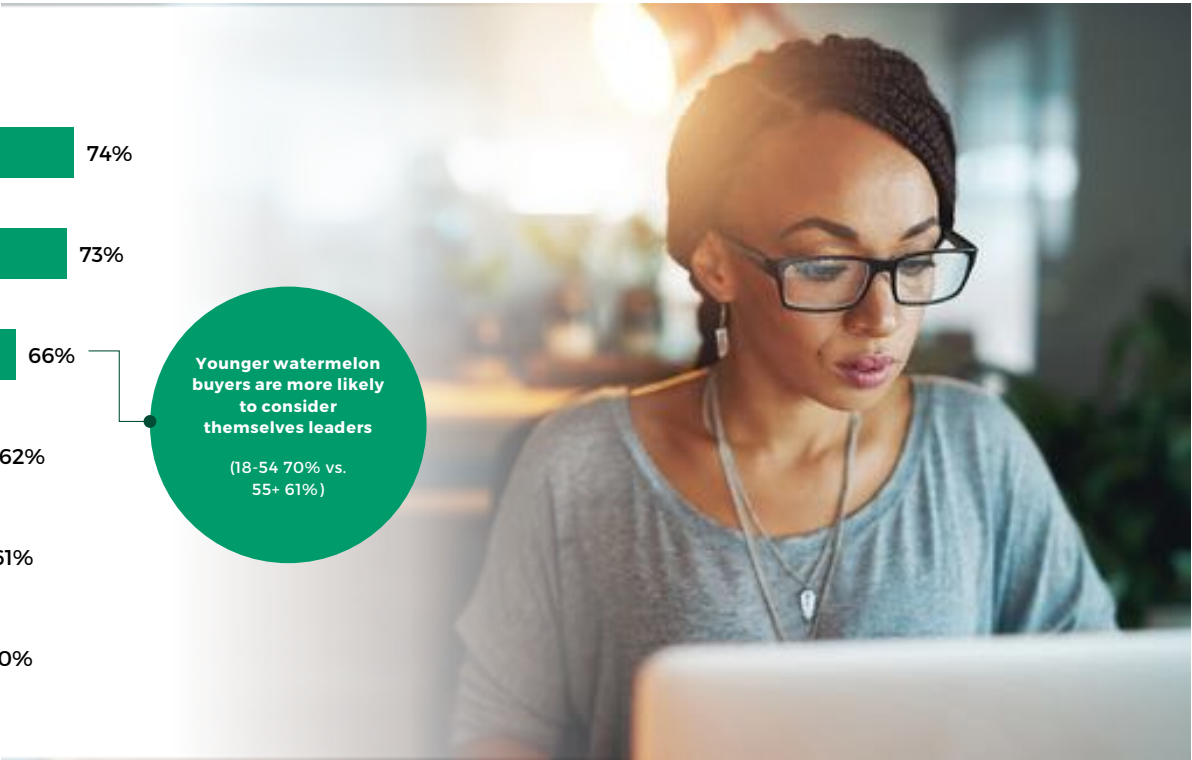


While they may be somewhat quiet, they are go-getters and used to taking charge.

Describe Themselves As... (Perfectly/A Lot Better/A Little Better)



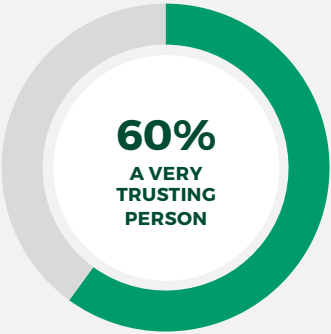
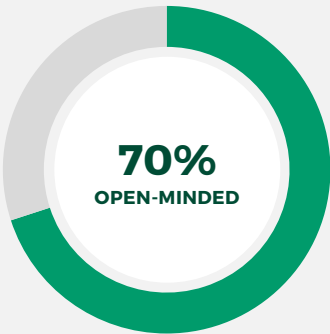
Younger watermelon buyers are more likely to consider themselves leaders
(18-54 70% vs. 55+ 61%)





They are open-minded and trusting, but less adventurous and tech-oriented.

They Are...
(Describes Me Perfectly/Very Well)



Many Are ...

ADVENTUROUS



Most Are Not ...

TECH-ORIENTED



Base Total Watermelon Purchasers n=805
QP2. Please indicate how much each statement below describes you.



Most watermelon consumers prefer home-cooked meals to eating meals out of the home. Nearly 7 out of 10 enjoy being creative in the kitchen or cook for fun at least once per week.

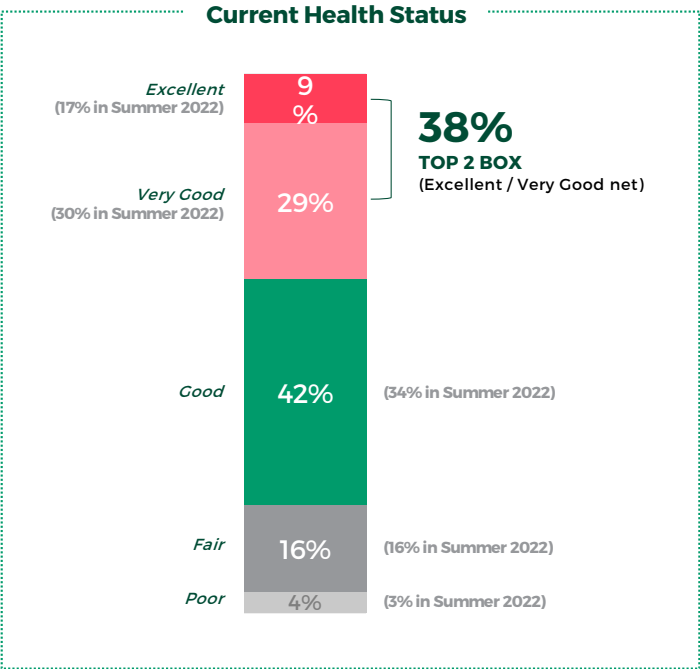
Food and Cooking Attitudes... *(Strongly Agree/Somewhat Agree)*



Sharing new and exciting watermelon recipes is likely to catch the attention of watermelon consumers



Watermelon buyers are in decent health but are open to exploring opportunities that could enhance their well-being.



Health Attitudes (Strongly Agree/Somewhat)



Base Total Watermelon Purchasers n=805, Summer 2022 Total Respondents n=1096
QH2. Would you say your health in general is...?
QH1. First, we would like to learn about your attitudes about health and nutrition. How much do you agree or disagree with the following statements?

A photograph of a person in a grocery store aisle, seen from the side, looking at a list. The person is wearing a light blue striped shirt. The background is filled with various fruits and vegetables on shelves. A green circle with the number 4 is overlaid on the image.

4

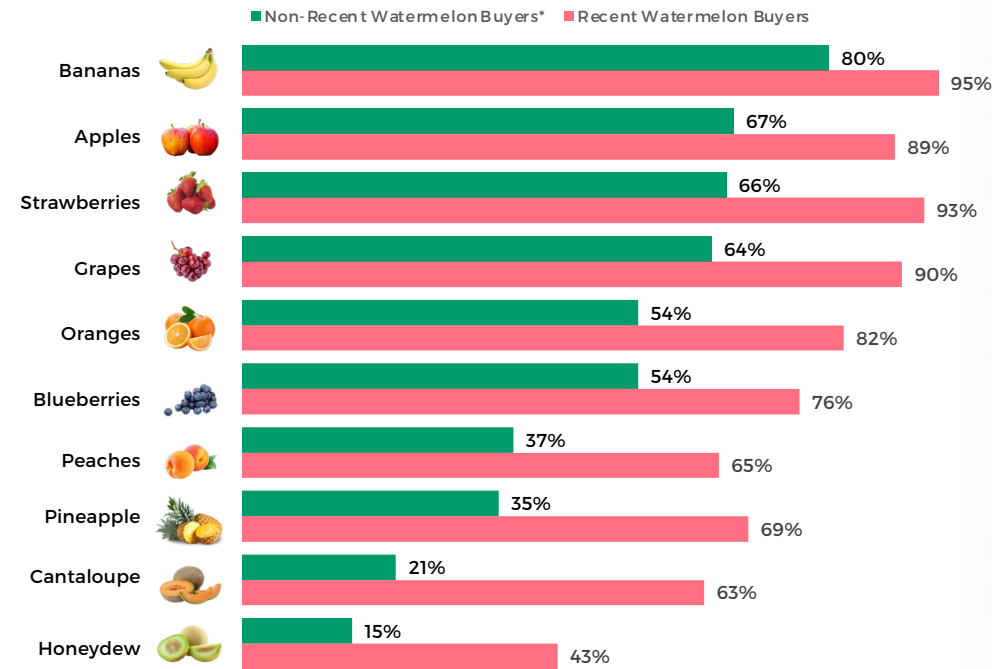
Non-Recent Purchasers

FRUITS PURCHASED



Non-recent watermelon buyers bought a variety of other fruits in the past 6 months, but less than recent watermelon buyers.

Fruit Purchased in Past 6 Months



All differences shown are significant



Base: Non-Recent Watermelon Purchasers n=361, Total Recent Watermelon Buyers n=805
Q1. You mentioned you purchased fresh fruit, how recently have you purchased each of the following?

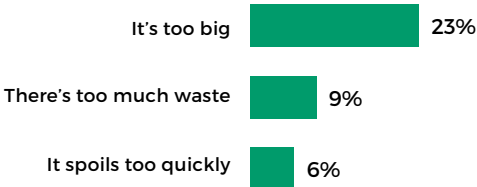
* Non-recent defined as have not purchased watermelon in past 6 months 40

REASONS HAVEN'T PURCHASED WATERMELON

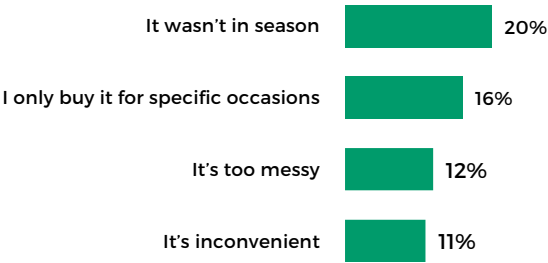


There is no consistent reason for not buying watermelon recently although the size can be a deterrent as well as not caring for the taste.

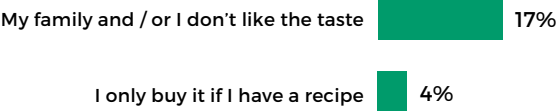
Size-related



Inconvenient / Limited Need



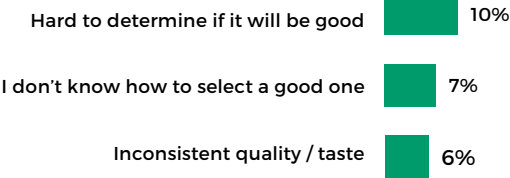
Taste / Health



Price / Value



Quality-related



Base: Non-Recent Watermelon Purchasers n=361
QJ. Why haven't you purchased watermelon in the last 6 months?

APPENDIX





Demographics Compared to U.S. 2020 Census

AGE

AGE GROUPS	RESPONDENTS	TOTAL U.S.
18 - 25	11%	9%
25 - 44	35%	26%
45 - 54	16%	12%
55 - 64	17%	13%
65+	21%	17%

GENDER

GENDER	RESPONDENTS	TOTAL U.S.
Male	46%	49%
Female	53%	51%
Non-binary	0.5%	n/a
Other	0.1%	n/a
Prefer Not To Say	0.1%	n/a

U.S. REGION

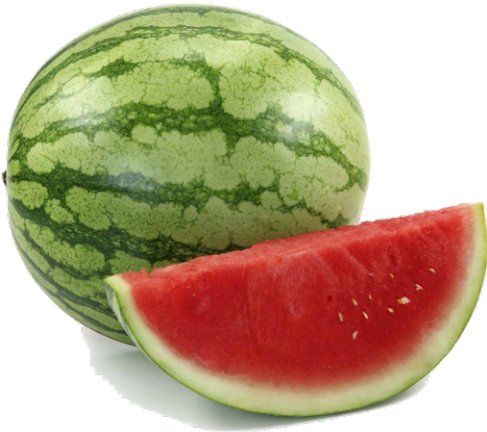
U.S. REGION	RESPONDENTS	TOTAL U.S.
Northeast	18%	17%
Midwest	23%	21%
South	39%	38%
West	20%	24%

INCOME

INCOME	RESPONDENTS	TOTAL U.S.
Less than \$25,000	14%	17%
\$25,000 - \$34,999	12%	8%
\$35,000 - \$49,999	14%	11%
\$50,000 - \$74,999	22%	16%
\$75,000 - \$99,999	15%	12%
\$100,000 - \$124,999	8%	9%
\$125,000 - \$149,999	7%	6%
\$150,000+	8%	20%

ETHNICITY

ETHNICITY	RESPONDENTS	TOTAL U.S.
White/Caucasian	74%	58%
Hispanic/Latino	15%	19%
Black/African American	9%	12%
Asian/Pacific Islander	5%	6%
Other Race or Ethnicity	2%	6%
Prefer Not To Say	1%	n/a





Thank You!

