



November 2023

WATERMELON A&U RESEARCH

18 – 34 Age Group

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 study builds upon learning from previous studies and is focused on better understanding the watermelon buyer aged 18 – 34 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



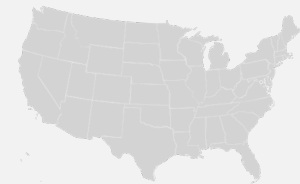
15-MINUTE ONLINE SURVEY

QUALIFICATIONS:

- Ages 18-34
- Females 57% / Males 41% / Other 2%
- Responsible for at least half of grocery shopping
- Purchased watermelon in the past 6 months

n=227
RESPONDENTS

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



80%
of adults 18-34
purchased
watermelon in
the past
3 months



KEY ACTIONS AND OPPORTUNITIES

Engage and Educate Watermelon Consumers To Stimulate Cravings



Engage With Watermelon Consumers

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



Educate Watermelon Consumers

1. Promote the health and nutritional benefits of watermelon
2. Educate consumers on where and how watermelon is sourced
3. Provide techniques to gauge quality and ripeness



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. Four out of five users aged 18 – 34 seek new information about the category, and many are open to new ways to use watermelon.



Share recipes to drive usage and encourage creativity in the kitchen

- Younger watermelon consumers are open to creative ways to prepare and enjoy watermelon.
- Nearly 3 out of 4 younger watermelon consumers feel joy when cooking for others and they cook for fun at least once per week
- Of surveyed consumers, 59% stated they were more likely to try a new recipe if it includes watermelon.



Drive impulse purchases by employing in-store signage and sampling

- Of surveyed consumers, 42% 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 and ripeness to increase engagement with the younger watermelon consumer. Many (60%) search for information about watermelon across digital platforms via search engines (e.g. Google). While more than one-third consult with health professionals or turn to health and wellness publications or apps to learn more about watermelon.



Promote the health and nutritional benefits of watermelon

- Among consumers who seek information, 44% specified they searched for the health benefits facts of watermelon while 38% sought nutritional facts.
- Nearly 90% of younger watermelon consumers said they would be more likely to buy watermelon knowing that it was good for hydration.



Educate consumers on how and where watermelon is sourced

- More than two-thirds of watermelon consumers aged 18 – 34 said that where their food comes from is important to them.
- Three out of 5 younger watermelon consumers said that they would be a lot more likely to buy watermelon if they knew that it was sustainably and locally grown.



Provide techniques to gauge quality and ripeness

- Nearly half (46%) of younger, information-seeking watermelon consumers want to learn how to choose a good watermelon.
- Four out of 5 watermelon consumers said they would be more likely to buy a watermelon if it is ripe and ready to eat.

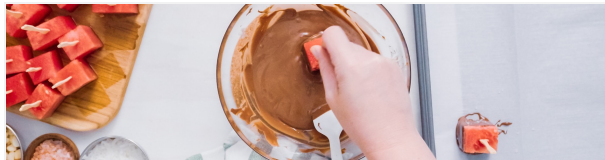
STIMULATE CONSUMERS' CRAVING FOR WATERMELON

"I had a craving" was the top purchase driver among younger 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 three-fourths of 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.
- Three out of 4 watermelon consumers aged 18 - 34 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

- About 4 out of 5 younger watermelon consumers eat watermelon as a snack, while half eat watermelon in a fruit salad.
- Three out of 4 consumers aged 18 – 34 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 small green circle with the number '1' is positioned above the title.

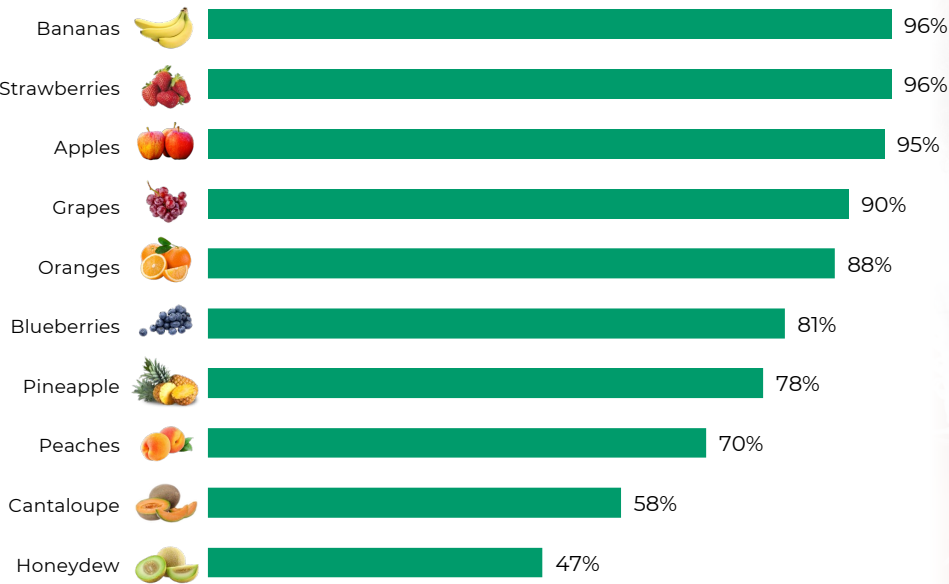
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Watermelon Purchase and Usage Dynamics



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

Fruit Purchased in Past 6 Months



To qualify for the study, respondents had to purchase watermelon in the past 6 months

Base: Total Watermelon Purchasers aged 18-34 n=227
Q1. You mentioned you purchased fresh fruit, how recently have you purchased each of the following?

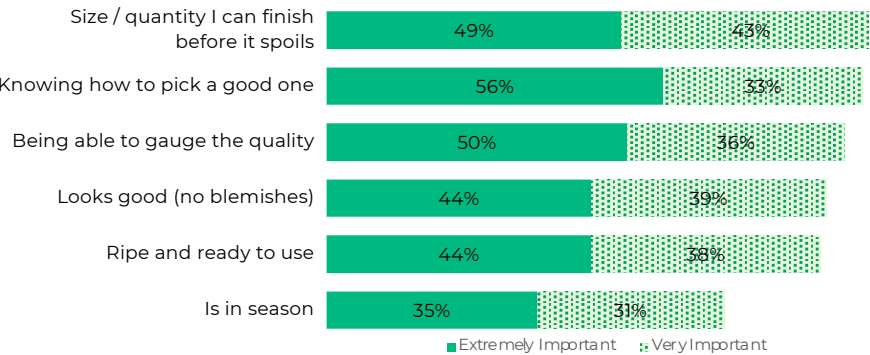
IMPORTANT CHOICE FACTORS



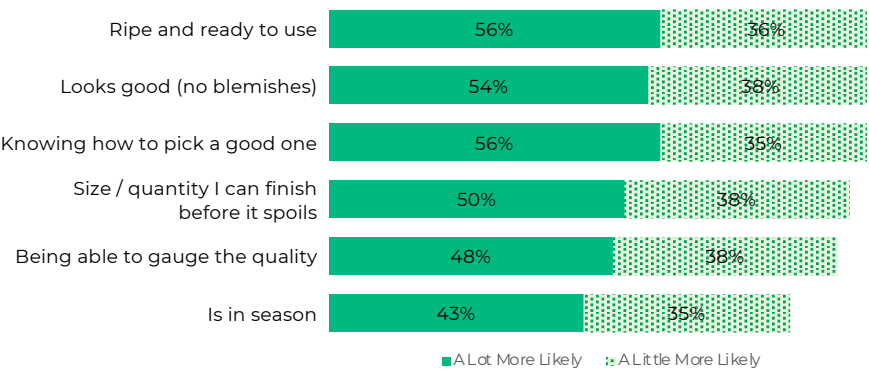
Size/quantity that can be used before it spoils tops the list when buying fresh fruit, but being ripe and ready to use is more influential for watermelon than fruit in general.



Choosing Fresh Fruit (% Extremely/Very Important)



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

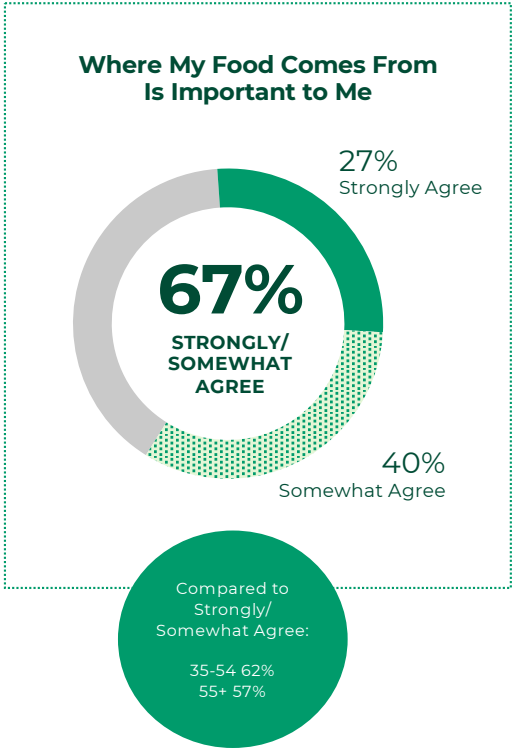
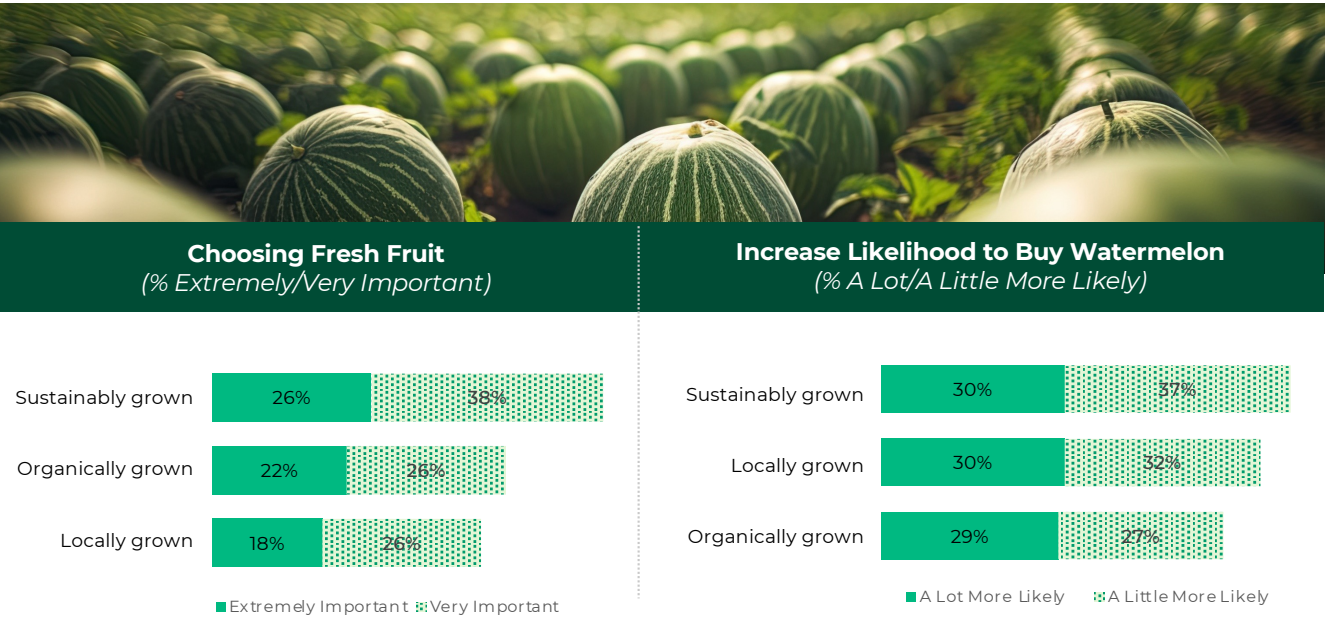


Base: Total Watermelon Purchasers aged 18-34 n=227
QF1. How important are each of the following when choosing fresh fruit?
QS1. How much does each of the following impact your decision whether or not to buy a watermelon?

IMPORTANT CHOICE FACTORS



For two-thirds of watermelon buyers aged 18 – 34, where and how fruit is grown, including watermelon, strongly impacts the decision of whether or not to buy.

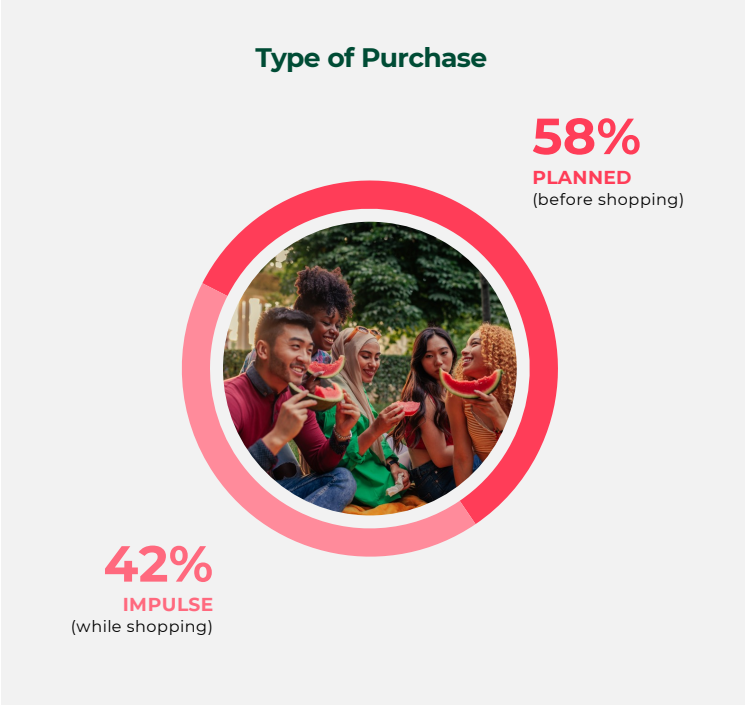


Base: Total Watermelon Purchasers aged 18-34 n=227, 35-54 n=274, 55+ n=304
QF1. How important are each of the following when choosing fresh fruit?
QS1. How much does each of the following impact your decision whether or not to buy a watermelon?
QC1. How much do you agree or disagree with the following statements about food and cooking?

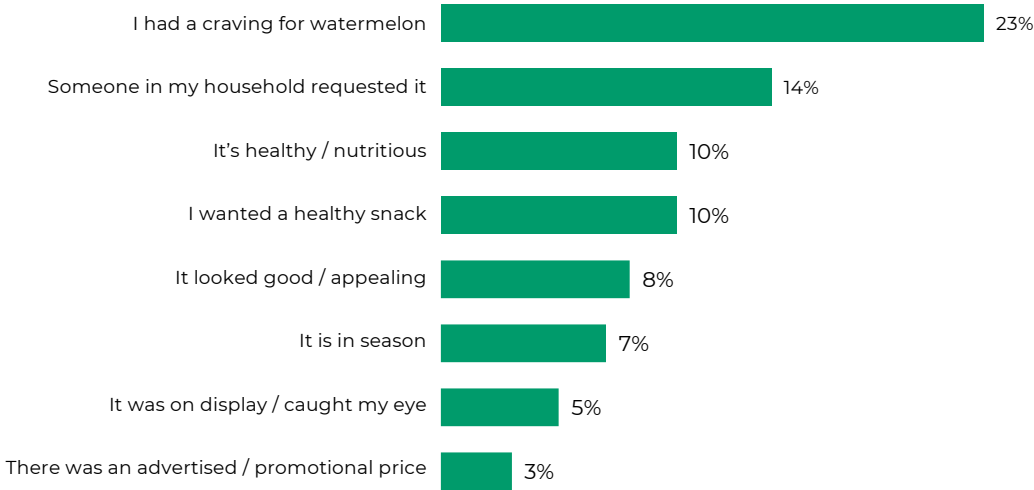
MAIN REASON PURCHASED (Last purchase)



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



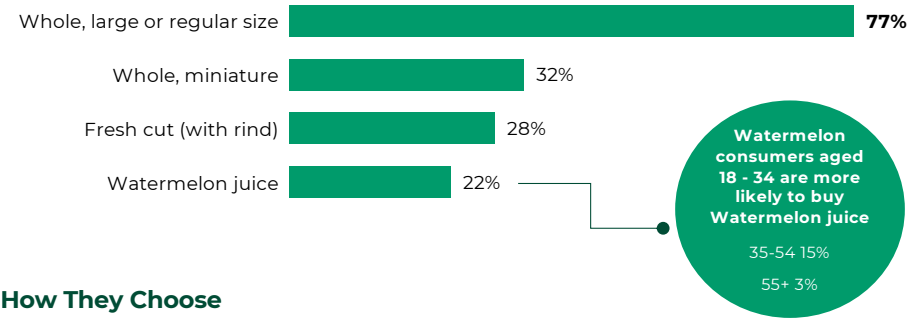
Base: Total Watermelon Purchasers aged 18-34 n=227, Planned Buyers n=132, Impulse Buyers n=95
QS3. Thinking specifically of the last time you purchased fresh watermelon, what was the main reason you decided to buy watermelon on that purchase occasion?
QS4. Thinking again about the last time you purchased watermelon did you....



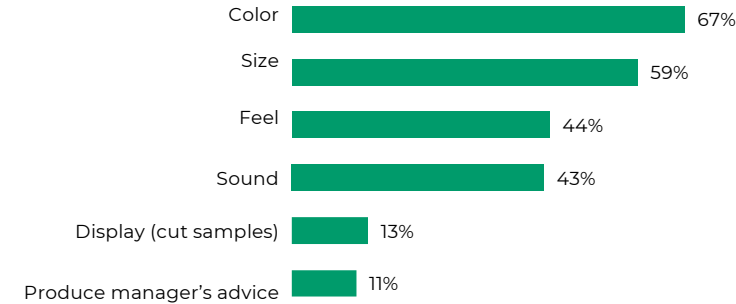
Large, whole watermelons are the most common form purchased and buyers primarily choose a watermelon based on the color. However, a sizeable group also buy fresh cut.



What They Buy



How They Choose



Base: Total Watermelon Purchasers aged 18-34 n=227, 35-54 n=274, 55+ n=304
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?

HOW THEY USE WATERMELON



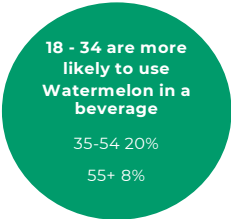
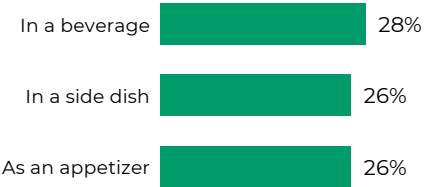
There is an opportunity to broaden the ways people eat watermelon.
While watermelon is primarily seen as a snack, many enjoy it in a fruit salad or as a dessert.

Watermelon Is Eaten...

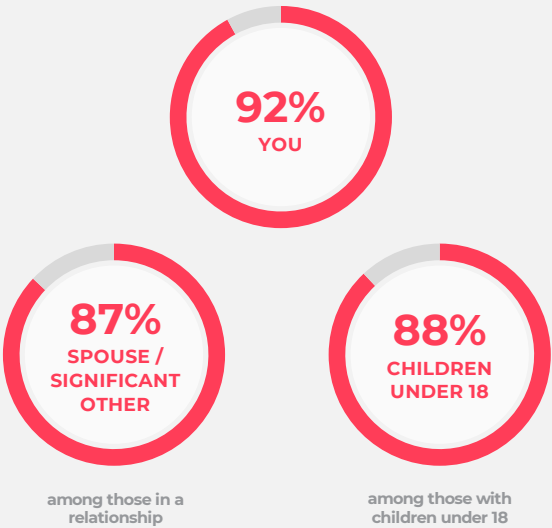
TOP USES:



ADDITIONAL USES:



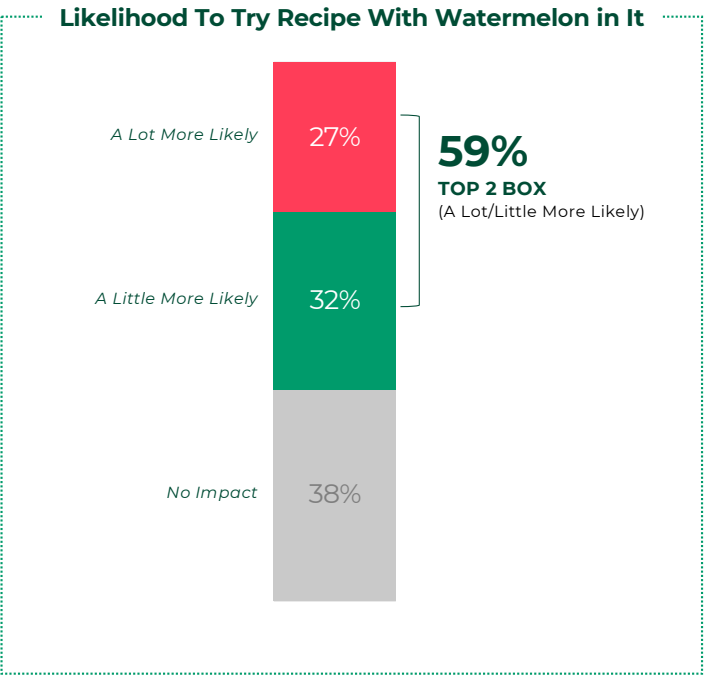
Who Eats Watermelon



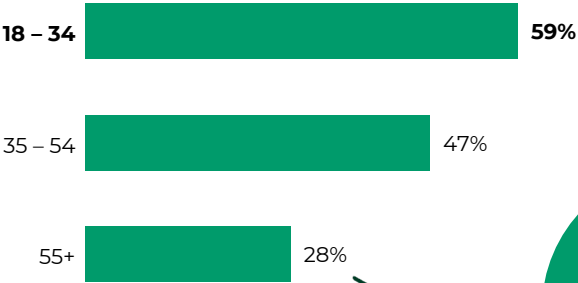
Base: Total Watermelon Purchasers aged 18-34 n=227, 35-54 n=274, 55+ n=304
QU1. In what ways do you serve/eat watermelon?
QU2. Who in your household eats watermelon?



Among younger purchasers, inclusion of watermelon in a recipe increases likelihood to try it.



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

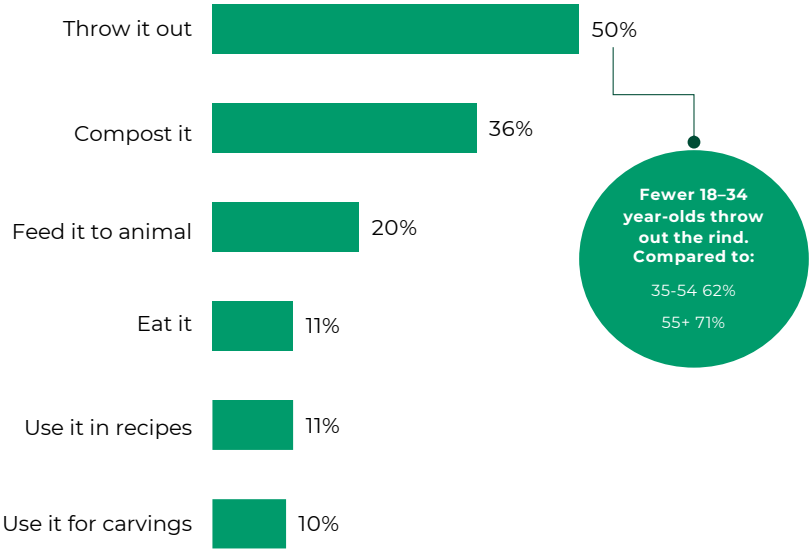
Base: Total Watermelon Purchasers aged 18-34 n=227, 35-54 n=274, 55+ n=304
QU3. How much does the inclusion of watermelon as an ingredient impact your likelihood to try a new recipe?

WHAT THEY DO WITH THE RIND



Only a small portion of watermelon buyers eat the rind.
More than one-third of younger buyers compost the rind.

What They Do With the Rind

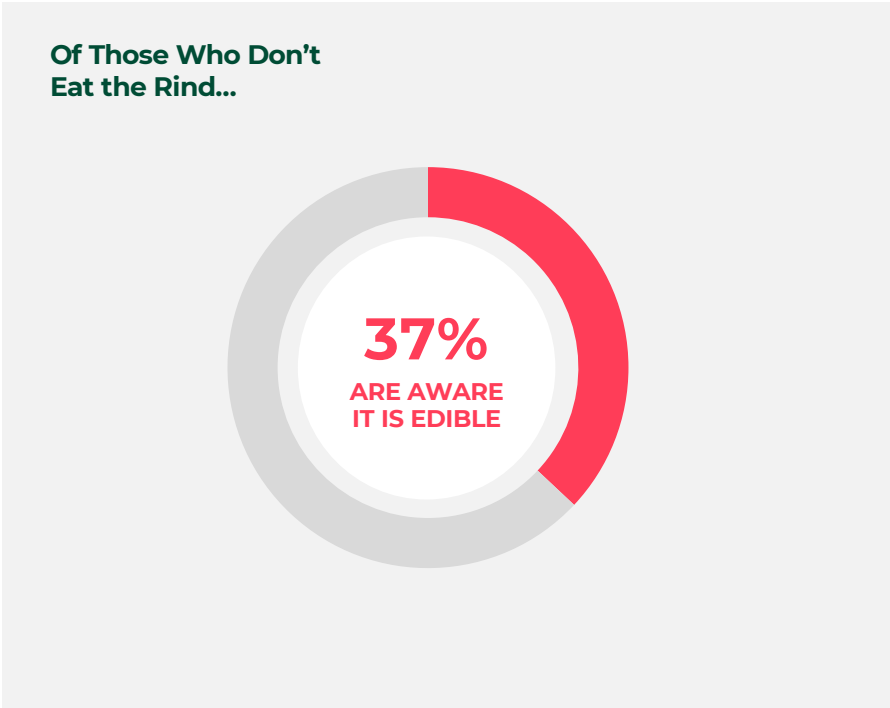


Base: Total Watermelon Purchasers aged 18-34 n=227 (Eat the rind n=59), 35-54 n=274, 55+ n=304
QR1. What do you do with the watermelon rind?

INTEREST IN EATING THE RIND



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



Of all Watermelon Consumers aged 18 – 34...



11%
use it in a recipe



73%
would eat it if they had more recipes
(Extremely / Very / Somewhat Likely)

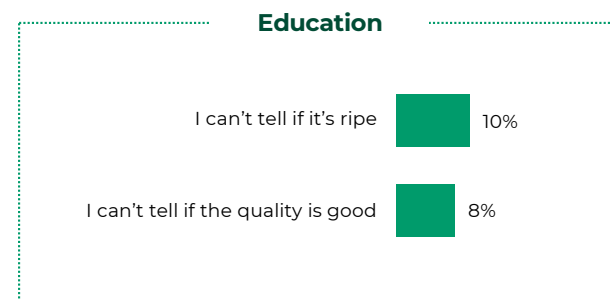
Base: Eat the rind n=26, Don't eat the rind n=201 Unaware rind is edible n=127
QR1. What do you do with the watermelon rind? QR2. Did you know that the watermelon rind is edible?
QR3. The rind is in fact, edible. If you had recipes that included the rind how likely would you be to eat the rind in the future : If you had recipes that included the rind how likely would you be to eat the rind?

REASONS DON'T BUY MORE OFTEN



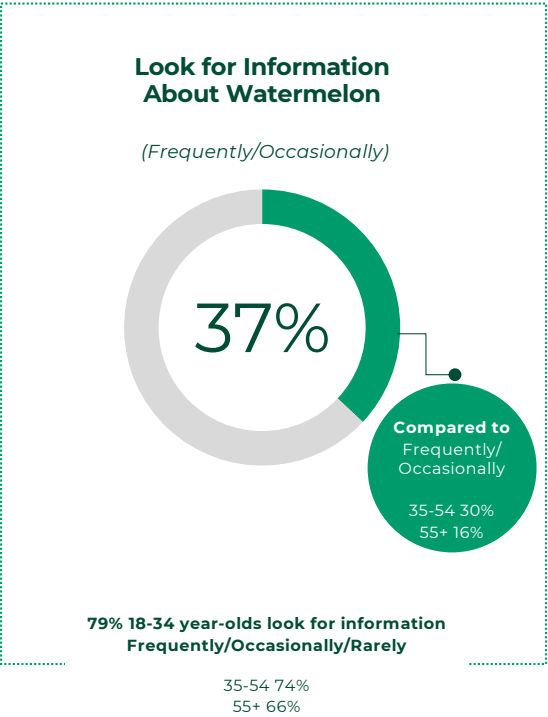
Availability is the #1 barrier to purchase.

Educating consumers about the quality and ripeness of watermelon could encourage additional purchases.



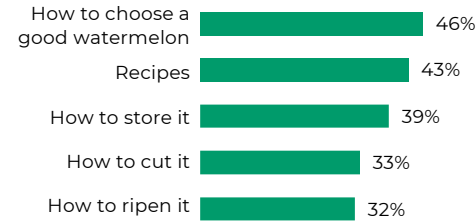


Many watermelon buyers have sought information about watermelon. Of those who frequently/occasionally seek information, most use search engines for guidance on choosing a watermelon and health benefits.

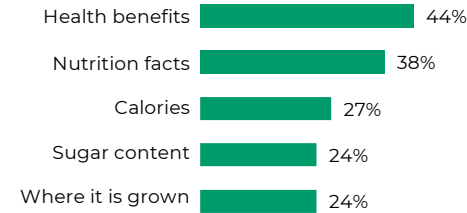


Type of Information
(Among those who search Frequently/Occasionally)

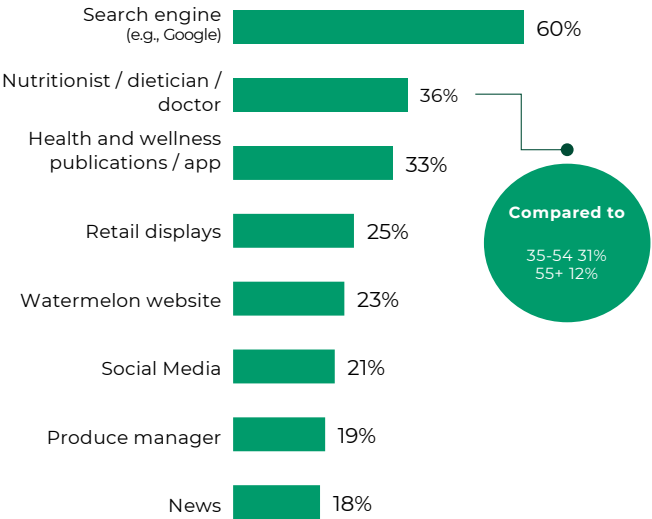
SELECTING / USE ADVICE



HEALTH / NUTRITION



Information Source
(Among those who search Frequently/Occasionally)



Base Total Watermelon Purchasers aged 18-34 n=227 (Look for information n=84) ; 35-54 n=274, 55+ n=304

Q11. How often do you look for information about watermelon?

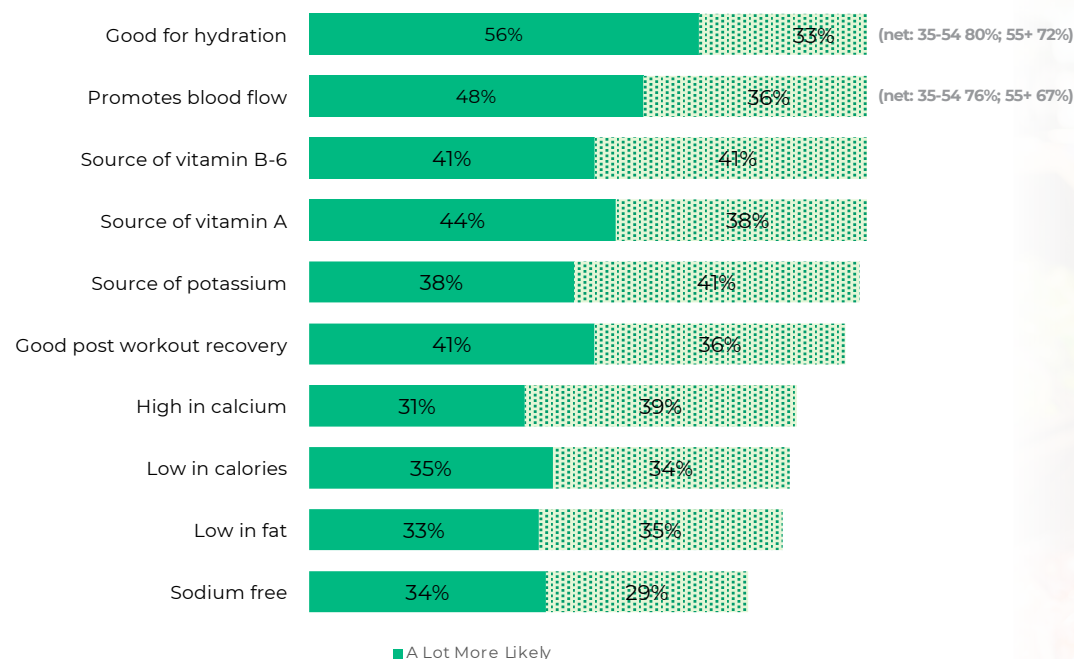
Q12. What type of information do you look for about watermelon?

Q13. Where do you get information about watermelon?



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

A Lot / Little More Likely To Buy...



Base Total Watermelon Purchasers aged 18-34 n=227, 35-54 n=274, 55+ n=304

Q14. What impact, if any, does the following nutritional information about watermelon have on your likelihood to buy watermelon?

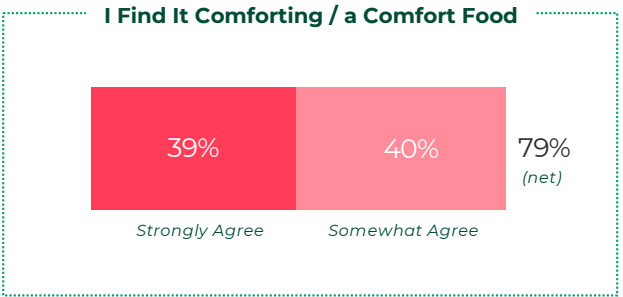
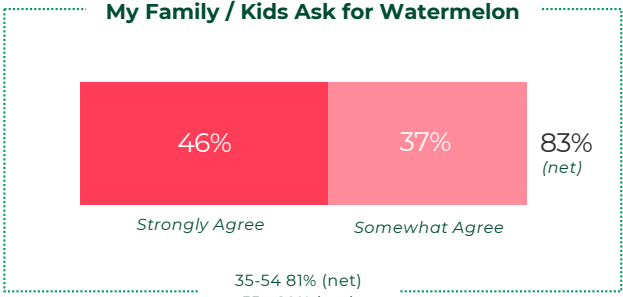
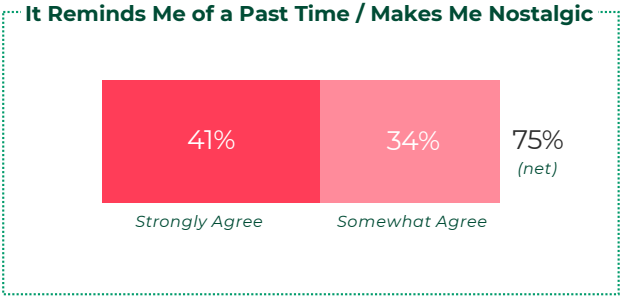
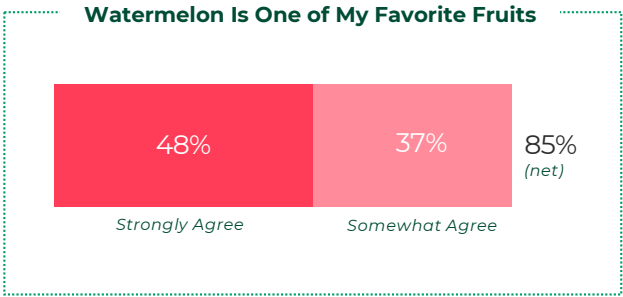
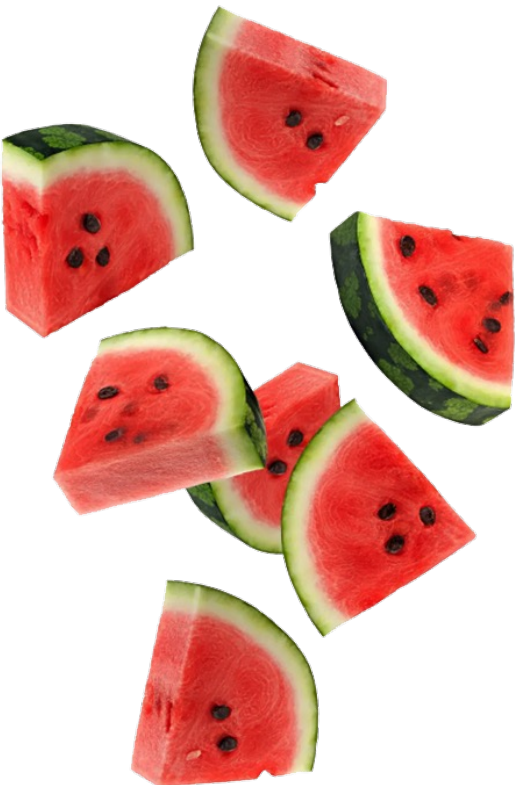
A background image showing a person with long brown hair eating a slice of watermelon. The person's face is partially obscured by a dark green rectangular overlay. The watermelon is bright red with black seeds. The background is softly blurred, showing warm indoor lighting.

2

Perceptions of Watermelon



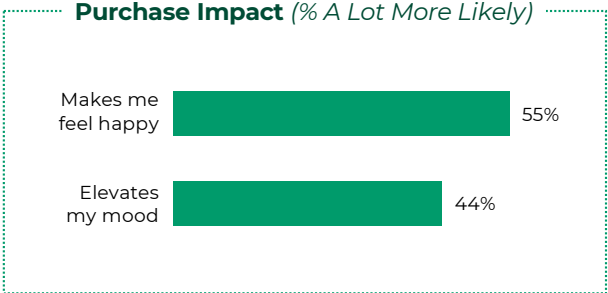
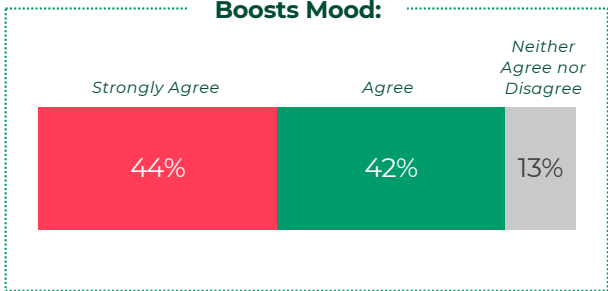
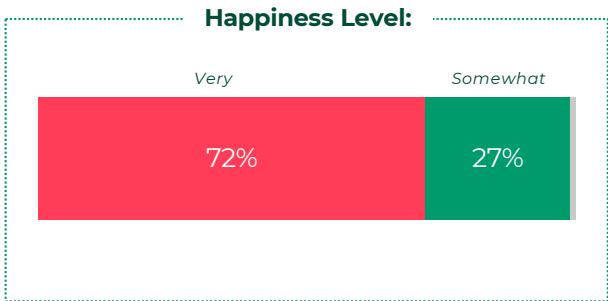
Watermelon is a household favorite and evokes nostalgic, comforting feelings.



Base Total Watermelon Purchasers aged 18-34 n=227, 35-54 n=274, 55+ n=304
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.

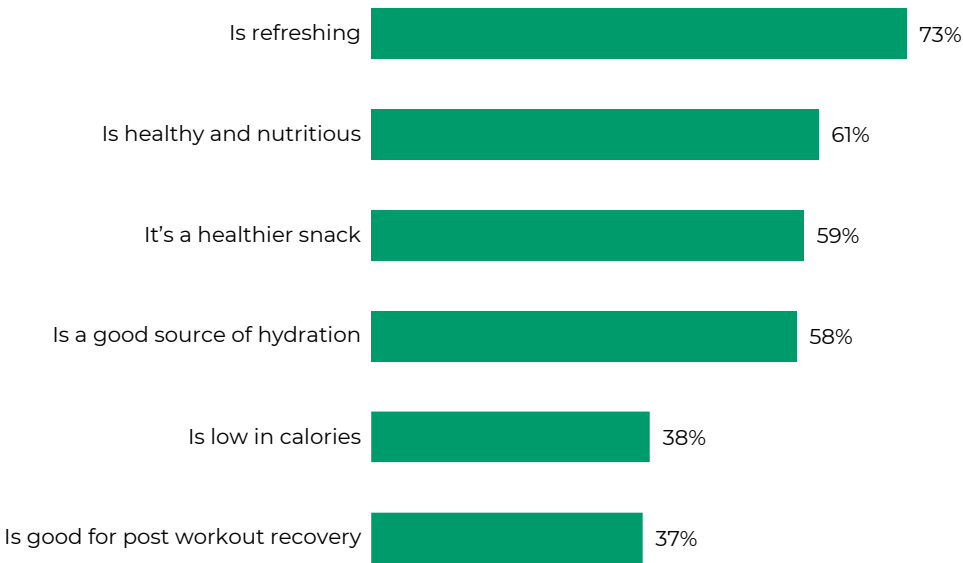


Base: Total Watermelon Purchasers aged 18-34 n=227
QS5a. Eating watermelon makes me feel:
QS5b. How much do you agree or disagree that watermelon boosts your mood?
QS1. How much does each of the following impact your decision whether or not to buy a watermelon?
QS3. Thinking specifically of the last time you purchased fresh watermelon, what was the main reason you decided to buy watermelon on that purchase occasion?

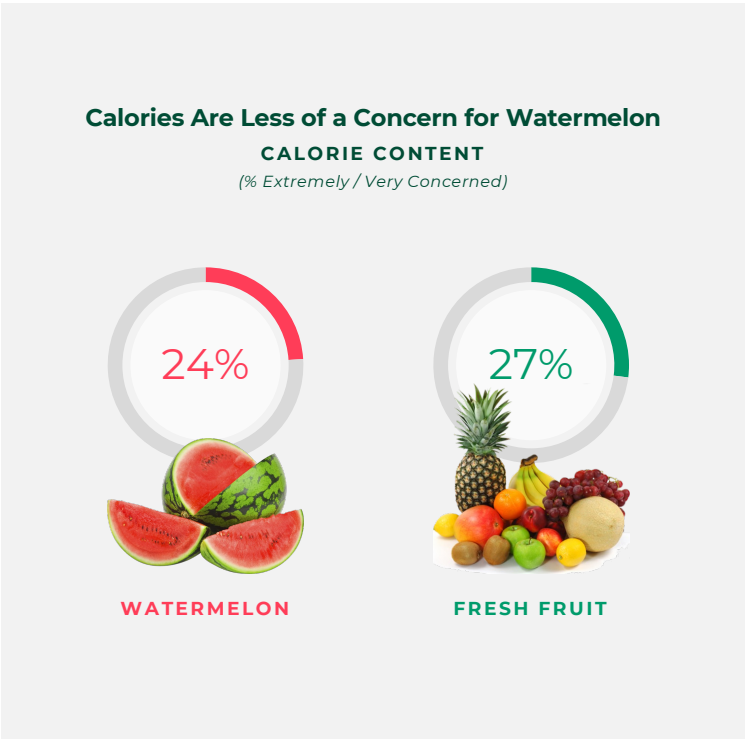


Watermelon is viewed as having numerous health benefits and the calorie content is less of a concern.

Describes Watermelon... (% Strongly Agree)



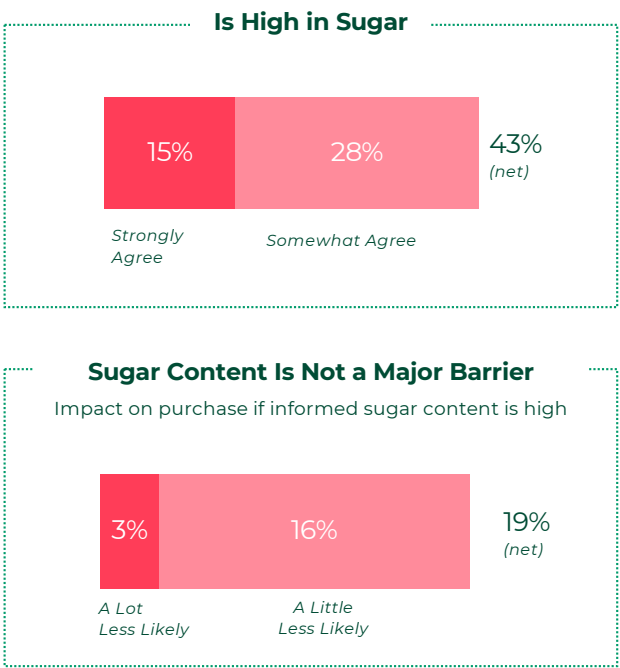
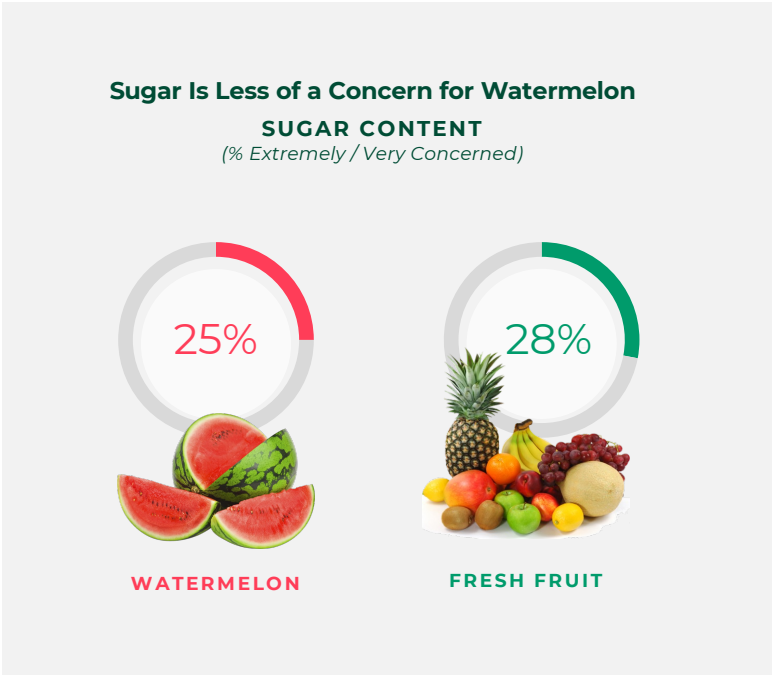
Base: Total Watermelon Purchasers aged 18-34 n=227
QS2. How much do you agree or disagree that each statement describes watermelon?
QS7. When buying watermelon, how concerned are you about each of the following:
QF2. When buying fresh fruit, how concerned are you about each of the following:



SUGAR CONTENT



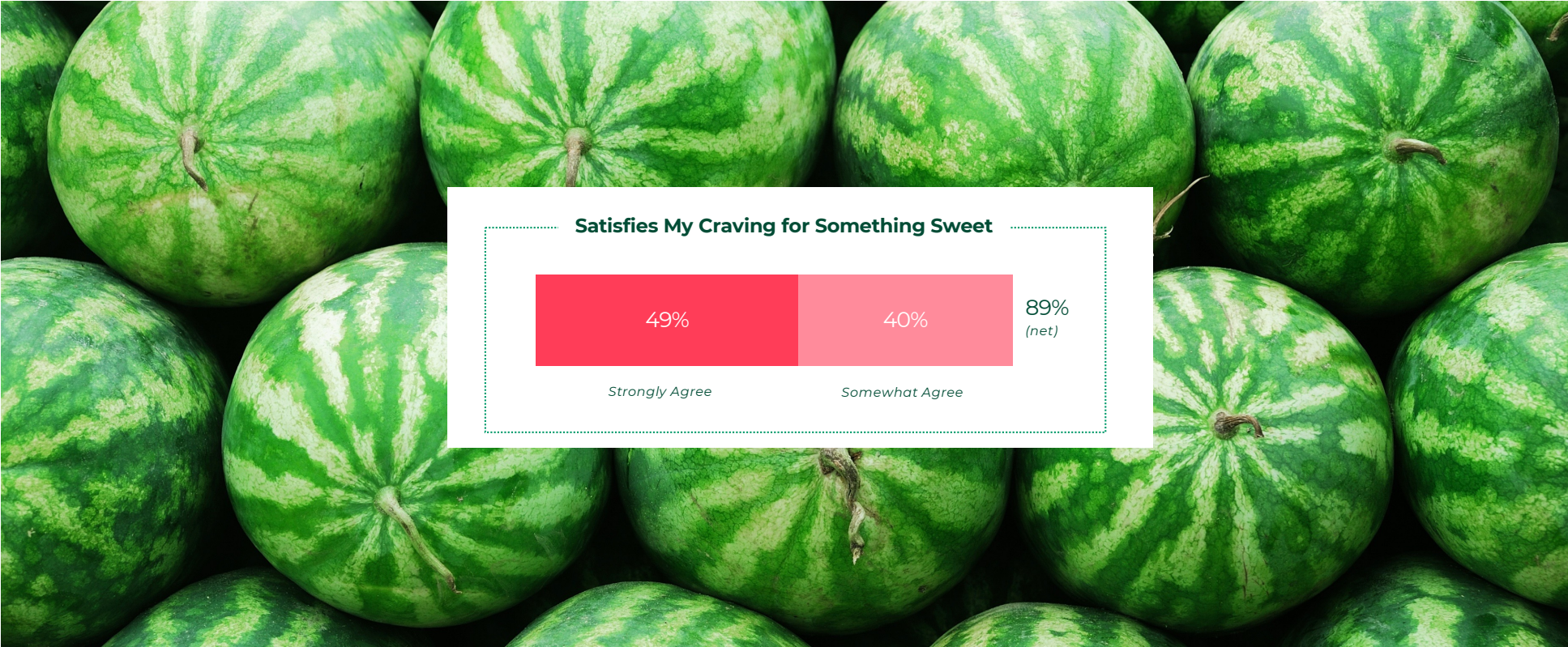
While some believe that watermelon is high in sugar, it is less of a concern than for fruit in general and is not a major barrier to purchasing watermelon.



Base: Total Watermelon Purchasers aged 18-34 n=227, Bought past 3 months n=182, Bought past 4-6 months n=45
Q57. When buying watermelon, how concerned are you about each of the following: Q52. 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: Q14. 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.

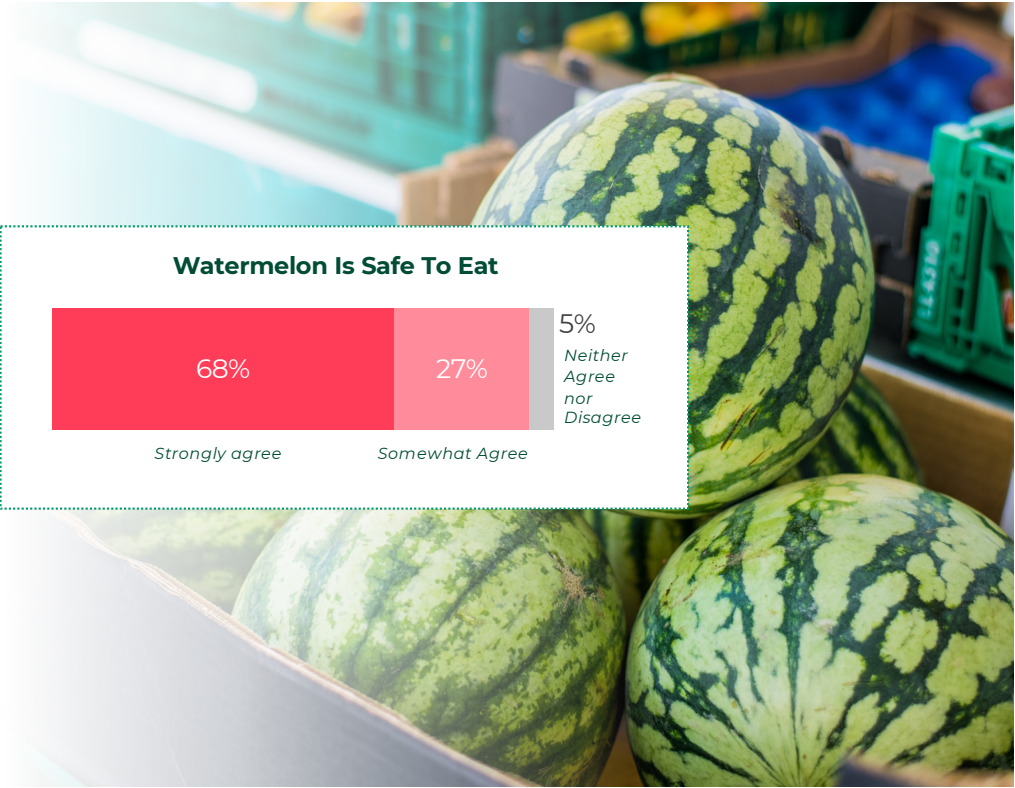
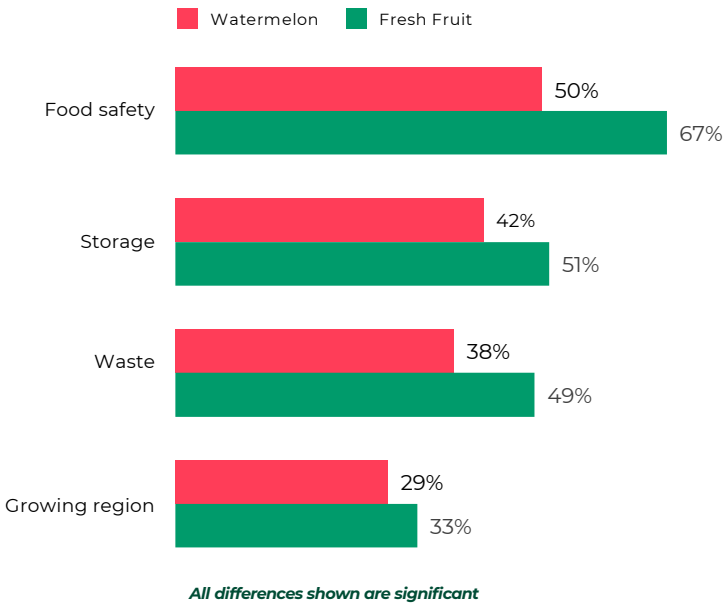


Base Total Watermelon Purchasers aged 18-34 n=227
QS2. How much do you agree or disagree that each statement describes watermelon?



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...

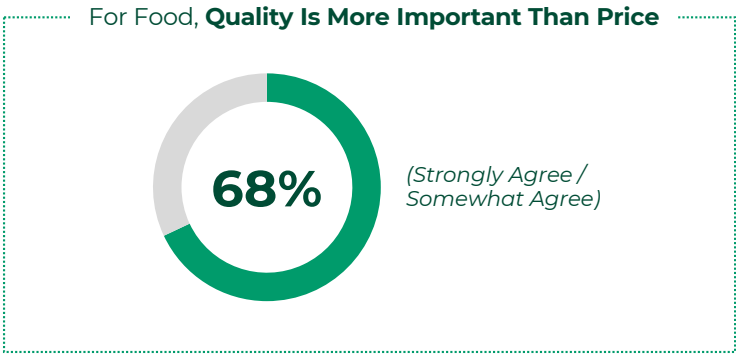
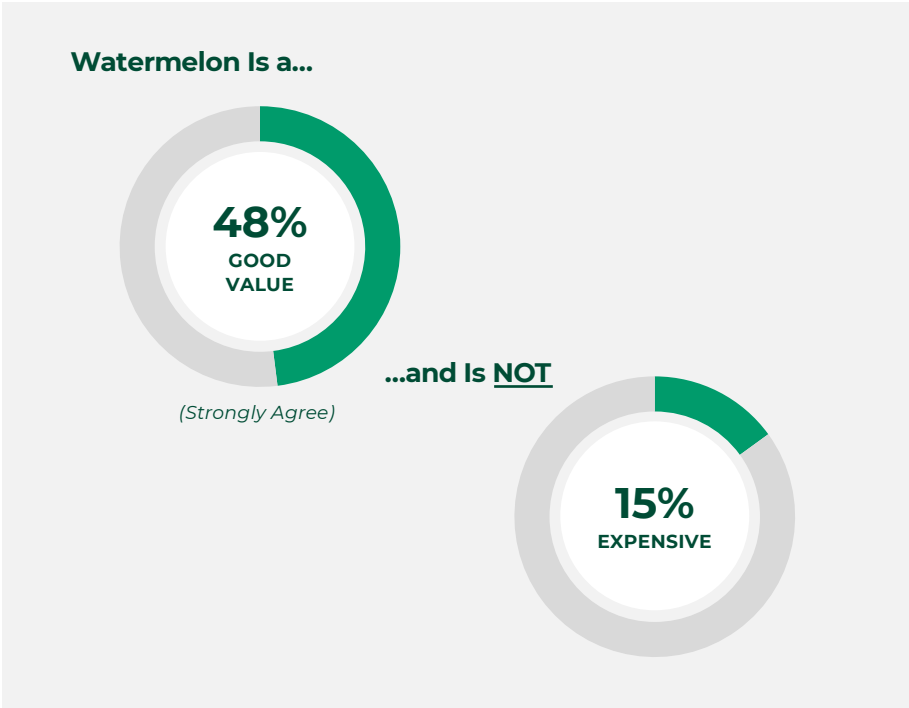


Base: Total Watermelon Purchasers aged 18-34 n=227
QS7. When buying watermelon, how concerned are you about each of the following:
QF2. When buying fresh fruit, how concerned are you about each of the following:
QS2. How much do you agree or disagree that each statement describes watermelon?

VALUE



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 aged 18-34 n=227, 35-54 n=274, 55+ n=304
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 photograph of a grocery store aisle. In the foreground, a person's hand is reaching out to touch a large, green watermelon with dark green stripes. The watermelon is resting on a wooden crate. In the background, other watermelons are visible on shelves, and a blurred figure of a person is standing further down the aisle. A dark green rectangular overlay is positioned in the center of the image, containing the number 3 and the title text.

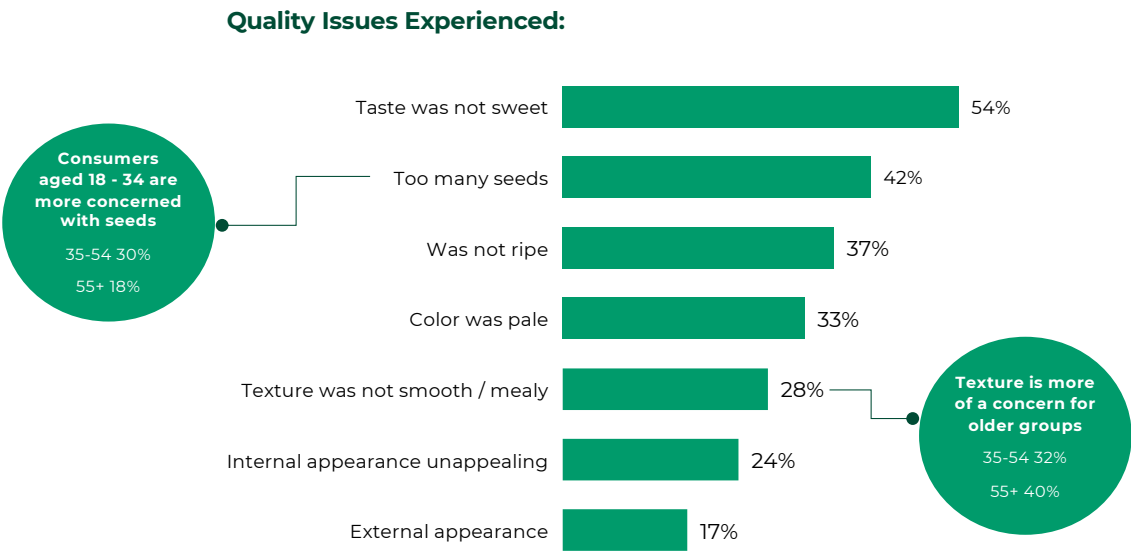
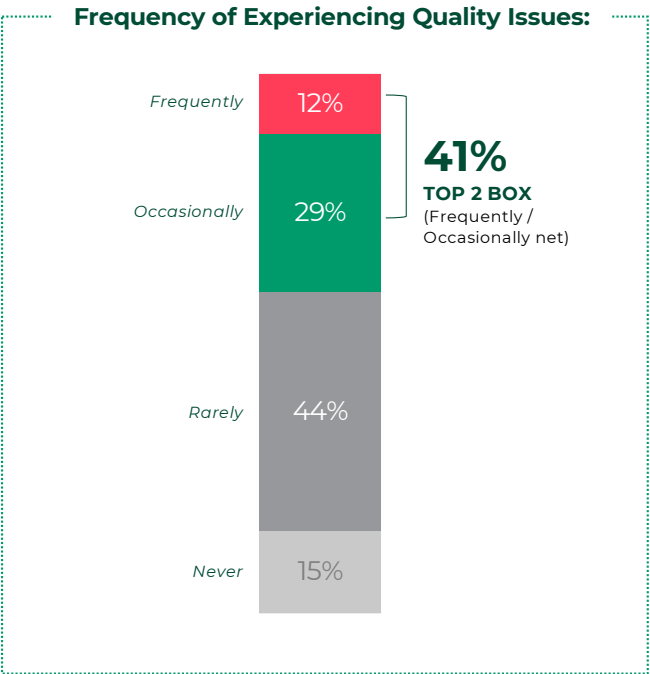
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Understanding the Watermelon Buyer

QUALITY ISSUES



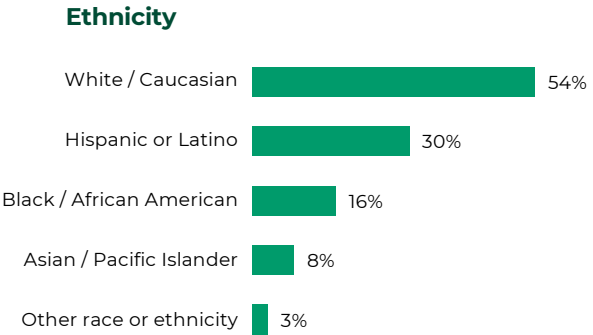
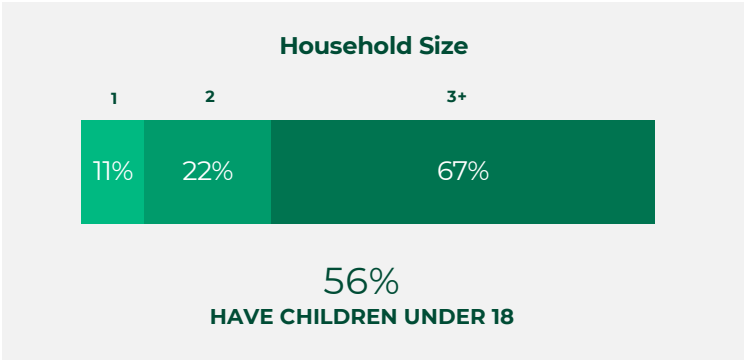
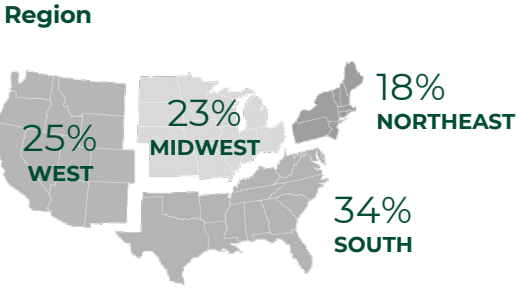
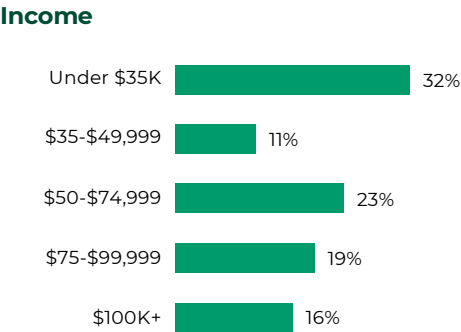
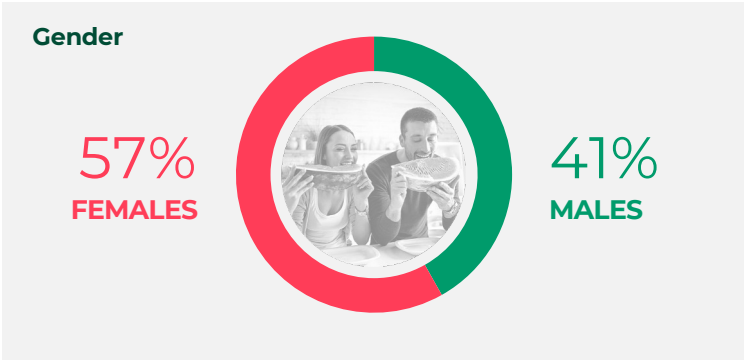
Most watermelon consumers have encountered an issue with watermelon quality; 41% frequently or occasionally encountered issues. The most common problem is lack of sweetness, followed by too many seeds.



Base: Total Watermelon Purchasers aged 18-34 n=227, 35-54 n=274, 55+ n=304
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 more than half of households having children.

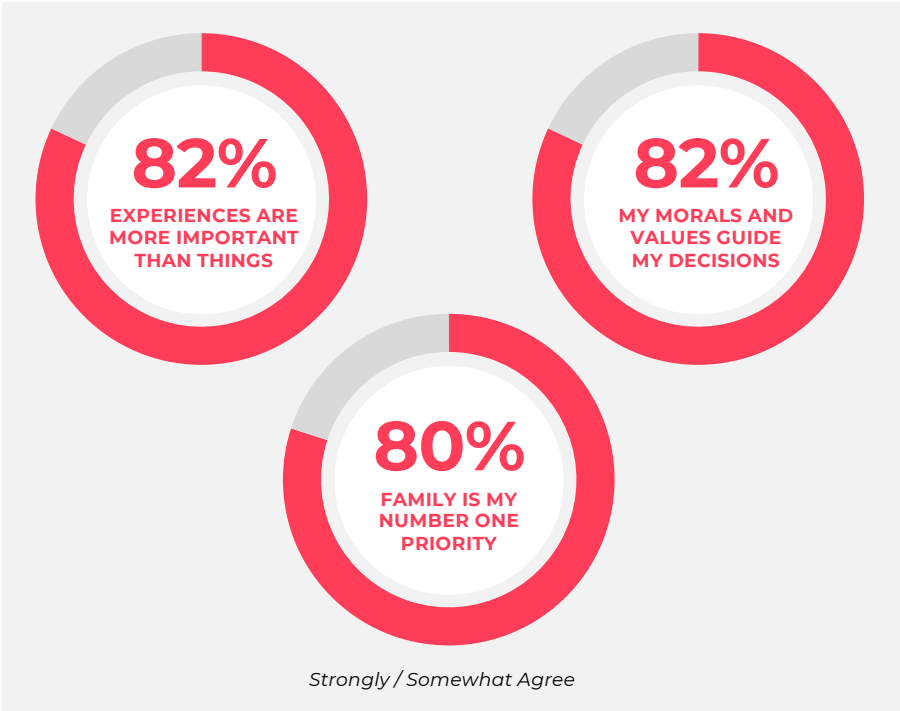


Base: Total Watermelon Purchasers aged 18-34 n=227

SELF-DESCRIPTORS



Watermelon buyers aged 18 – 34 are experience seekers and are family oriented, while viewing themselves as average and mainstream.



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



Base Total Watermelon Purchasers aged 18-34 n=227
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 looking to try new things.



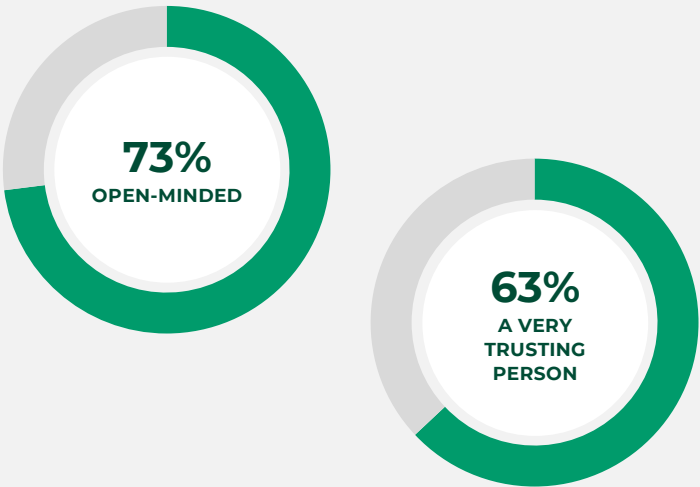
Base Total Watermelon Purchasers aged 18-34 n=227, 35-54 n=274, 55+ n=304
QP1. How would you describe yourself/your preferences? For each pair of words, please choose the point on the scale that you feel best describes you. If you feel one of the words in each pair describes those feelings perfectly, then please choose the box closest to that word. If neither word describes you perfectly, please choose somewhere in the middle.

SELF-DESCRIPTORS



They are open-minded and trusting adventurers. While some do not embrace technology, 18 – 34 year olds are the most tech-savvy of any other age group.

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



Many Are ...

ADVENTUROUS



Some Are ...

TECH-ORIENTED



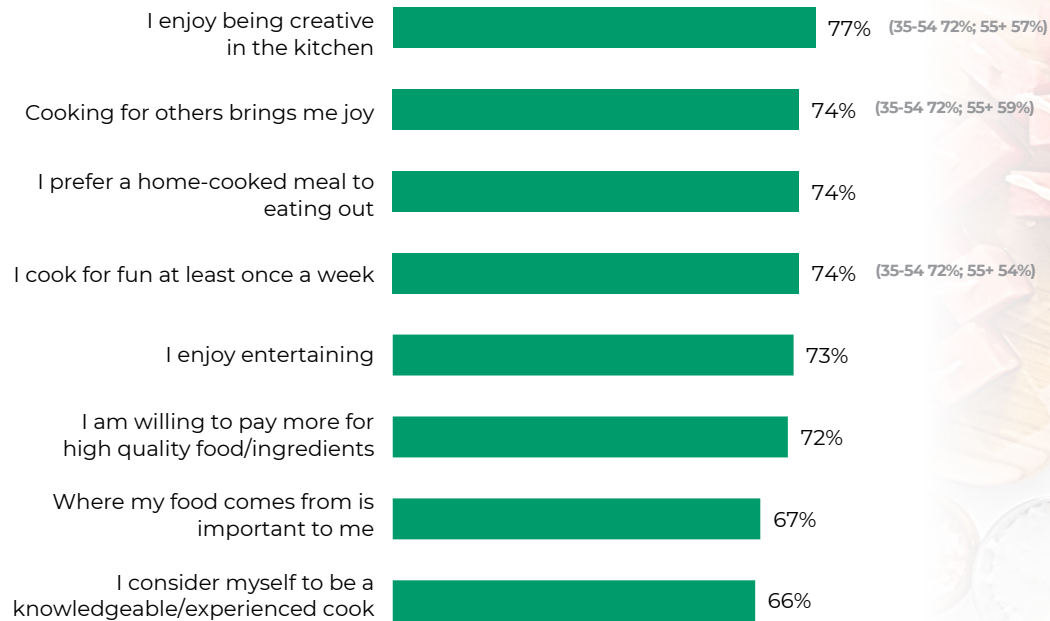
Base Total Watermelon Purchasers aged 18-34 n=227; 35-54 n+274; 55+ n=304
QP2. Please indicate how much each statement below describes you.

SELF-DESCRIPTORS



About 7 out of 10 younger watermelon consumers enjoy being creative in the kitchen and prefer a home-cooked meal to eating out. They find joy in cooking for others and cook for fun at least once per week.

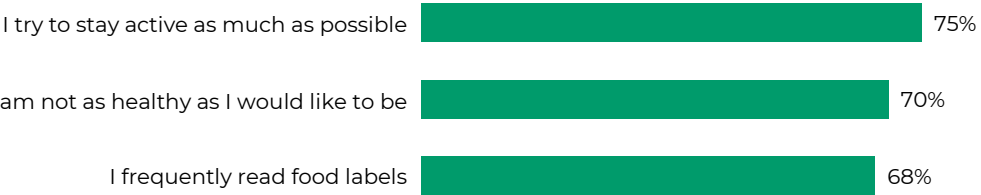
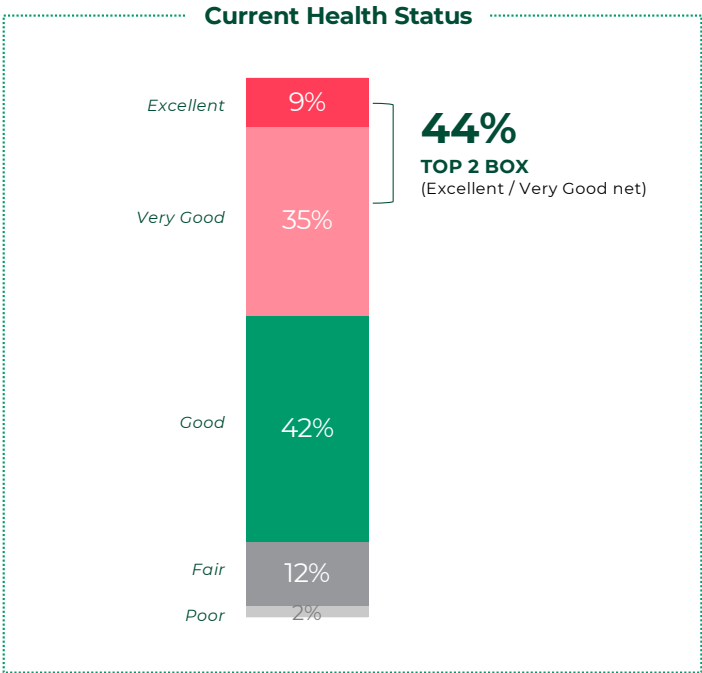
Food and Cooking Attitudes... (Strongly Agree/Somewhat Agree)



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



Watermelon buyers aged 18 – 34 believe they are in decent health but are open to exploring opportunities that could enhance their well-being.



Base Total Watermelon Purchasers aged 18-34 n=227
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?

APPENDIX





Demographics Compared to U.S. 2020 Census

GENDER

GENDER	RESPONDENTS	TOTAL U.S.
Male	41%	49%
Female	57%	51%
Non-binary	1%	n/a
Other	0%	n/a
Prefer Not To Say	0%	n/a

U.S. REGION

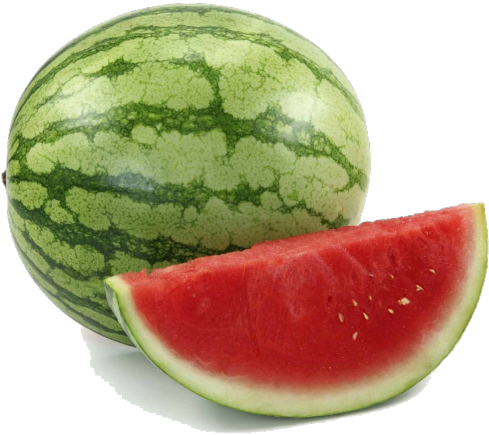
U.S. REGION	RESPONDENTS	TOTAL U.S.
Northeast	18%	17%
Midwest	23%	21%
South	34%	38%
West	25%	24%

INCOME

INCOME	RESPONDENTS	TOTAL U.S.
Less than \$25,000	14%	17%
\$25,000 – \$34,999	18%	8%
\$35,000 – \$49,999	11%	11%
\$50,000 – \$74,999	23%	16%
\$75,000 – \$99,999	19%	12%
\$100,000 – \$124,999	8%	9%
\$125,000 – \$149,999	4%	6%
\$150,000+	4%	20%

ETHNICITY

ETHNICITY	RESPONDENTS	TOTAL U.S.
White/Caucasian	54%	58%
Hispanic/Latino	30%	19%
Black/African American	16%	12%
Asian/Pacific Islander	8%	6%
Other Race or Ethnicity	3%	6%
Prefer Not To Say	0%	n/a





Thank You!

