

# Consumer Perspectives & Engagement with Watermelon

- Appeal
- Away from home behavior
- Flavors & applications
- Opportunities & hurdles

Menu Matters



+



National Watermelon Promotion Board



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# METHODOLOGY

## Objectives and Methodology

**National Watermelon Promotion Board**, as part of its ongoing effort to understand consumer and operator behavior, sought to update its 2024 consumer research study to ensure it is powering strategic and tactical decisions with the most relevant and up-to-date insights. National Watermelon Promotion Board (NWPB) required trended consumer insights to understand how and why consumer behavior may have changed over the last two years.

To this end, Menu Matters designed an online consumer research methodology that provides National Watermelon Promotion Board with the insights it required. This online study was fielded in July 2025 to a nationally representative group of consumers balanced against the most recent census. These consumers were qualified by some watermelon affinity.

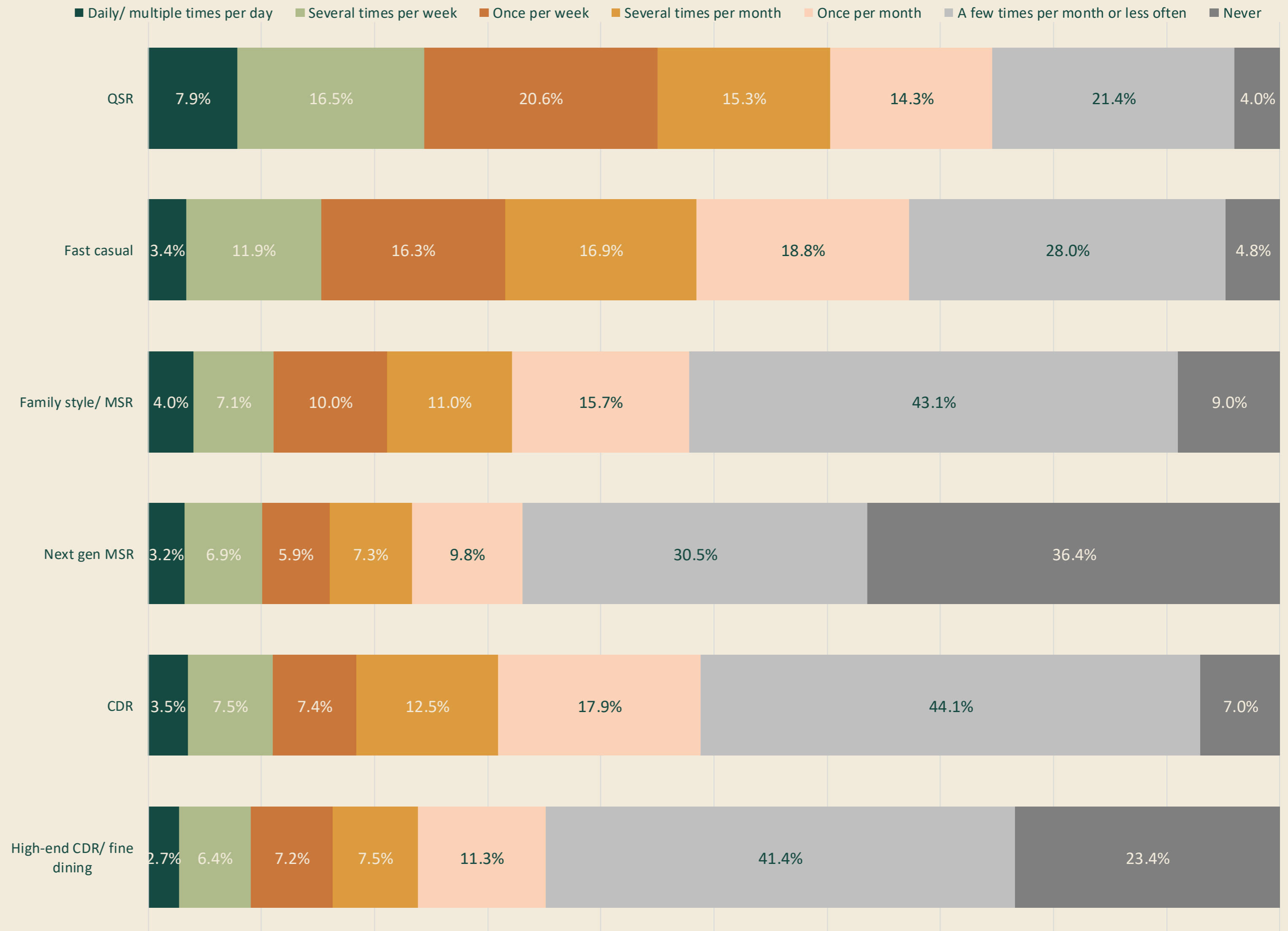
The findings from this study are presented in this report.

Qualified Completed Sample N=1004	
<b>Age</b>	
18-29	17.4%
30-49	34.9%
50-59	16.9%
60 or older	30.9%
<b>Gender</b>	
Male	48.9%
Female	50.9%
<b>Income</b>	
Under \$50,000/year	34.3%
\$50,000 – under \$75,000/year	12.3%
\$75,000 – under \$125,000/year	23.3%
Over \$125,000/year	24.6%
<b>Race</b>	
Caucasian	76.8%
Hispanic	8.4%
African American	11.8%
Other	8.5%
<b>Children at Home</b>	
Primary Shopper	88.4%

# Additional Sample Details



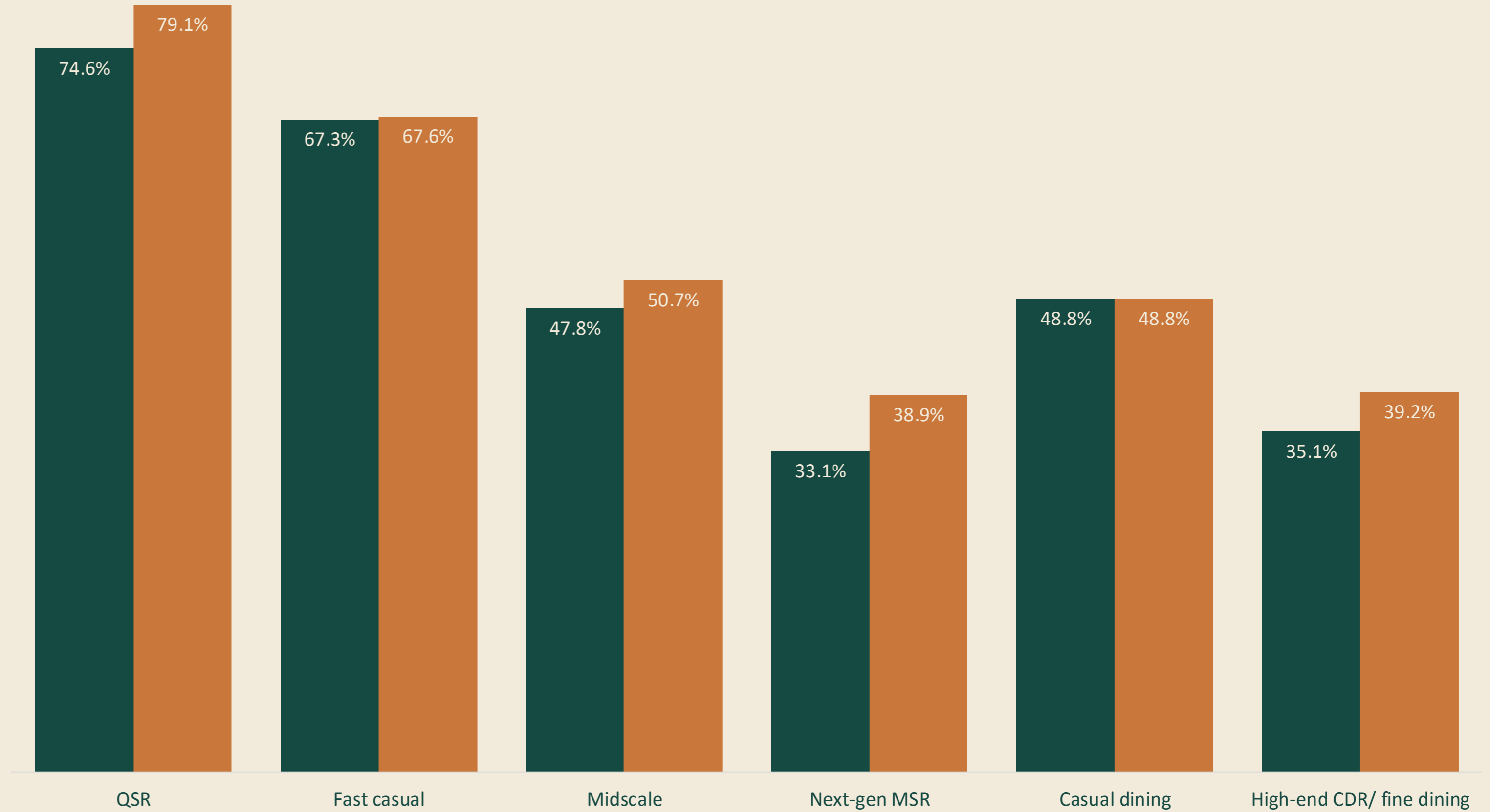
Segment Visitation Frequency



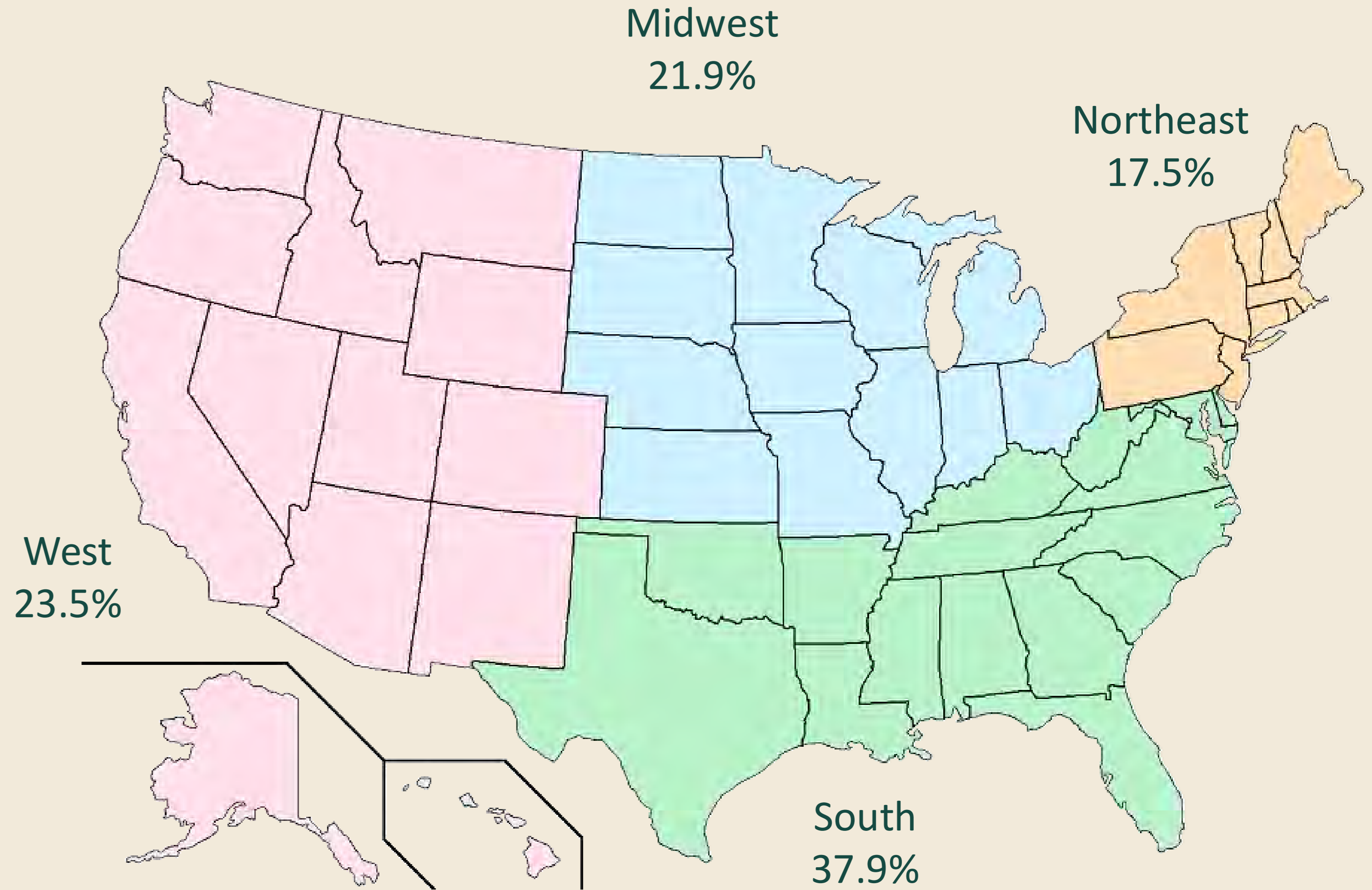
# Additional Sample Details

Once per Month Or More Often Visitation

2025 2024



## Additional Sample Details






# KEY FINDINGS

1. At first glance, it appears consumers have shifted away from watermelon a bit over the past year, but this decline is driven exclusively by Gen X and Boomers. Gen Z and Millennials, on the other hand, appear to have even more strongly embraced fresh watermelon overall and as an innovative and engaging ingredient for both foods and beverages.
2. There is no question, through both this quantitative research and the social listening, that watermelon is strongly associated with being “refreshing.” And while that is the primary emotional association, younger consumers far more so than older also associate it with being energizing, inspiring, exciting and joyful. These emotional ties can be used to inform innovation and offer a far broader innovation palate with which operators may work than does “nostalgia.”
3. Younger consumers are now associating watermelon more with being on-trend and innovative and are looking for innovative fresh watermelon inclusive foods and beverages away from home. Older generations have pulled back on both, but this may be due to a decline in foodservice spend in general among older consumers as well as some alienation with the more innovative watermelon dishes featured over the past year which may be counterintuitive to older consumers but engage and excite younger consumers.
4. Gen Z is less inclined to look for specific applications featuring watermelon than they are intrigued with and interested in unique flavor combinations, regardless of the application. That said, beverages tend to capture this generation’s interest more so than food and nonalcoholic beverages specifically are a category this generation is extremely engaged with.
5. Again, younger consumers are even more aware of and interested in fresh watermelon rind as an ingredient than are older consumers. Younger consumers are looking for it in a wide variety of applications, offering operators a new ingredient to work with and a way to maximize the cost effectiveness of fresh watermelon.
6. Despite some softness in the foodservice industry overall, there is no question innovation at foodservice can have a positive impact on retail spend and deserves to be the focus of promotional efforts by the NWPB. Innovation by chefs trickle down to consumer interest in watermelon and experimentation at home. The key challenge, however, is that consumers trust chefs more than themselves to select the “perfect watermelon” which is a hurdle that needs to be addressed at retail but certainly an opportunity to be leveraged by foodservice, assuming they do, in fact, have perfectly ripe and well-handled watermelon.



# Thought Starters

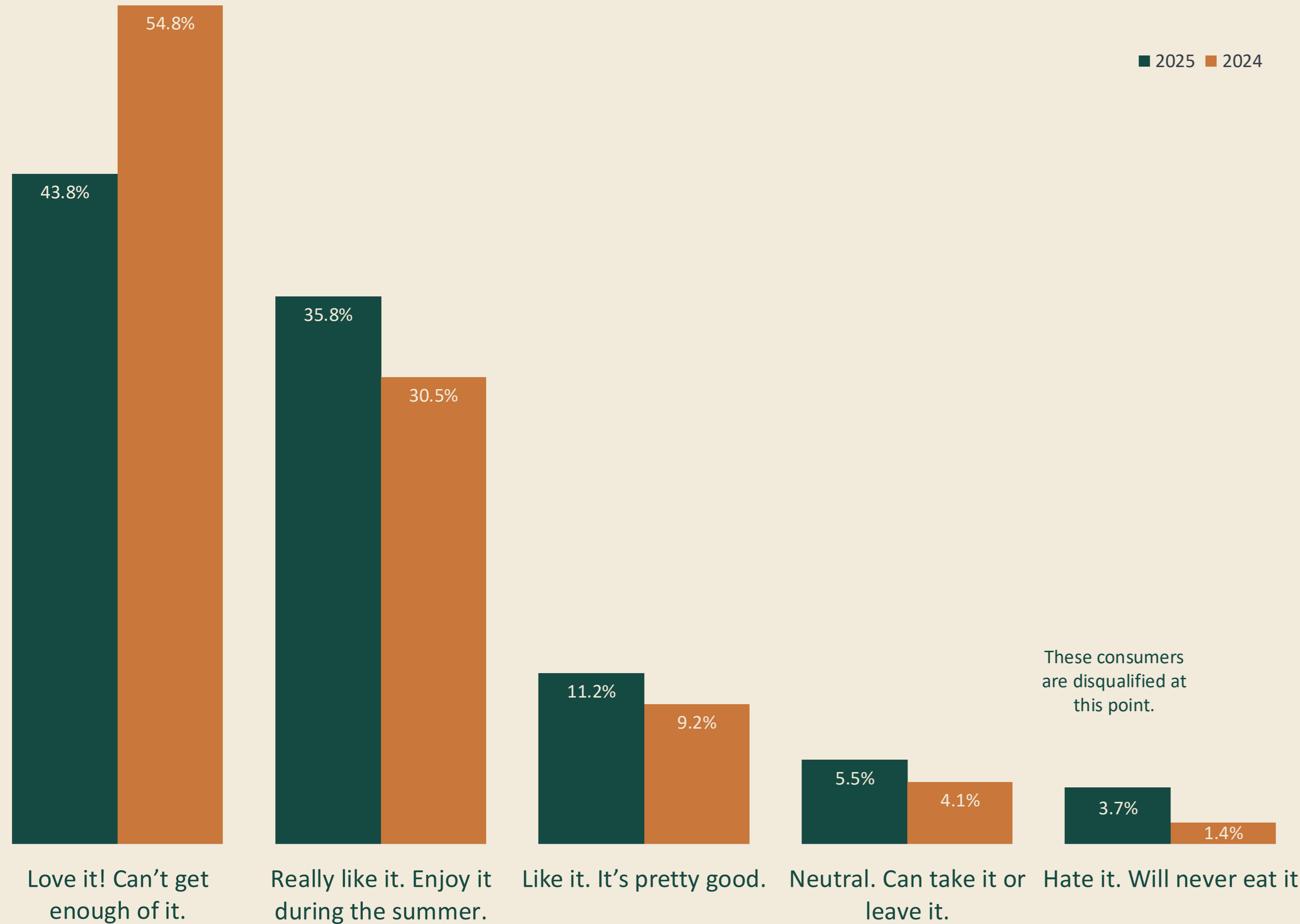
1. There is a clear story here for operators about the importance of innovation, particularly in capturing Gen Z's attention and interest. Focusing on flavor-forward – and by that we mean flavor-descriptive and flavor-interest – innovation, with applications a secondary consideration, is critical.
2. With beverages, of course, Gen Z is most engaged and embraces a wide range of innovation in – primarily – the nonalcoholic space as well as with alcoholic beverages. There's plenty of license to be playful, creative, challenging and inventive.
3. Innovation is joyful, inspiring, exciting and energizing. While watermelons are inherently and intuitively refreshing, tapping into the joyfulness of watermelons through innovation and watermelon's vibrant color will speak emotionally to younger consumers and, likely, consumers across generations.
4. While desserts are not a focus for NWPB, they shouldn't be discounted as a source of innovation. Gen Z has shown a penchant for sweet treats and the right innovation in this area will keep the dessert menu from being either overwhelming or uninspiring.
5. Appetizers and snacks are the key area for innovation with watermelon when it comes to savory opportunities. These smaller bites invite safe experimentation and fit with shifts in consumer consumption behavior. Additionally, these items can be portable and fit a range of occasions for operators.
6. While the color of watermelon is joyful, that vibrancy can act as a foil for darker elements in either color or flavor. Operators shouldn't be afraid to embrace that contrast as younger consumers appear open to that type of conflicting presentation.
7. “Watertok” has become particularly popular this year on social media and the focus on hydration has increased, despite declines in associations with watermelon. The need for hydration is seasonless, so this may be a key way for watermelon to break out of the spring/ summer limitation and into year-round relevance.
8. Operators are not innovating enough with watermelon rinds given both the awareness and interest by younger consumers. Using whole fresh watermelon and leveraging all parts of it is a great way for operators to support or to build out sustainability stories, which are most impactful for younger consumers.

A photograph of watermelon slices on a wooden cutting board. In the background, a whole watermelon is cut in half. In the foreground, two triangular slices of watermelon are placed on a light-colored wooden cutting board. The watermelon has a vibrant red interior with visible seeds and a green rind. The background is a plain, light-colored surface.

# GENERAL BEHAVIOR

## Watermelon Affinity

How do you feel about fresh watermelon? (n=1119)



## Watermelon affinity remains strong, but has weakened somewhat over the past year

The vast majority of consumers love or “really like” watermelon. This has remained true over the past year and reflects the strong affinity consumers have for watermelon.

From 2024 to 2025, however, the affinity weakened a bit with a significant decline in those consumers who indicate they love watermelon (-7 pts). It’s important to note, though, that this did not shift significantly to a dislike of watermelon, with only a slight rise in those indicating they dislike it (+2.3 pts).

### Key Takeaway:

Watermelon remains an extremely popular fruit, but understanding the shift in affinity will be important to stem any further disinclination among consumers to either purchase or order watermelon.

## Watermelon Affinity by Generation

How do you feel about fresh watermelon? (n=1003)



## Younger consumers have a significantly higher affinity for watermelon

Though overall affinity may have weakened a bit, younger consumers are strongly embracing watermelon with 63% of Gen Z and 51% of Millennials noting they love it.

Affinity is weakest among Gen X when considering “love it” and “really like it” responses, a generation that doesn’t hate watermelon but is far weaker in its affinity for it. In fact, the shift in affinity appears driven by Gen X and Boomers, generations which expressed far lower shares of “love it” responses.

### Key Takeaway:

Affinity rising among younger consumers may be driven by innovative watermelon menuing and products, particularly in the beverage category for which these generations have a special affection. While losing older consumers is not ideal, gaining younger consumer engagement is critical for long-term growth.

	“Love It”	
	2025	2024
Gen Z	63%	50%
Millennials	51%	52%
Gen X	40%	64%
Boomers	33%	50%

## Emotional Connections with Watermelon

What type of emotions or emotional experiences would you associate with fresh watermelon? Please select all that apply. (n=1061)



NOTE: Arrows identify statistically significant changes.

## Many emotional connections are tied to summer moods and tones

Most consumers associate being “refreshed” with watermelons, which follows given its position as a cool, hydrating and crisp fruit. Closely associated with “refreshed” is “satisfied,” driven additionally by its hydrating qualities.

It’s important to note, however, that these are not the only emotions associated with watermelon but, rather, the most common. There are, in fact, a wide range of emotions that consumers may associate with watermelon and that can be leveraged based on venue, occasion and application.

### Key Takeaway:

Focusing on the potential emotional experience associated with a watermelon-based or featuring item coupled with the occasion can lead to more resonant innovation and innovation that could potentially push watermelon past solely summer-focused foods and beverages.

## Emotional Connections with Watermelon

What type of emotions or emotional experiences would you associate with fresh watermelon? Please select all that apply.

	Top Emotions (over 30% indicating)	Higher Indexing Emotions
<b>Gen Z</b> (n=174)	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Joyful</li> <li>Satisfied</li> <li>Relaxed</li> <li>Energized</li> </ul>	<ul style="list-style-type: none"> <li>Joyful</li> <li>Amused</li> <li>Intrigued</li> </ul>
<b>Millennials</b> (n=350)	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Joyful</li> <li>Satisfied</li> <li>Relaxed</li> <li>Comforted</li> <li>Energized</li> </ul>	<ul style="list-style-type: none"> <li>Joyful</li> <li>Comforted</li> <li>Inspired</li> <li>Proud</li> <li>Adventurous</li> </ul>
<b>Gen X</b> (n=169)	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Satisfied</li> <li>Nostalgic</li> <li>Relaxed</li> </ul>	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Nostalgic</li> </ul>
<b>Boomers</b> (n=310)	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Satisfied</li> <li>Nostalgic</li> <li>Relaxed</li> <li>Delighted</li> <li>Joyful</li> </ul>	<ul style="list-style-type: none"> <li>Refreshed</li> <li>Nostalgic</li> <li>Satisfied</li> <li>Delighted</li> </ul>

## Refreshed and satisfied resonate across generations

But while these two are universally relevant when it comes to watermelon, what skews more to one generation or another varies widely.

Older consumers are far more likely to skew toward refreshed as well as nostalgic. And, while watermelon can be nostalgic, it has been too singularly attached to this emotional experience for too long, hampering innovation that could engage younger consumers.

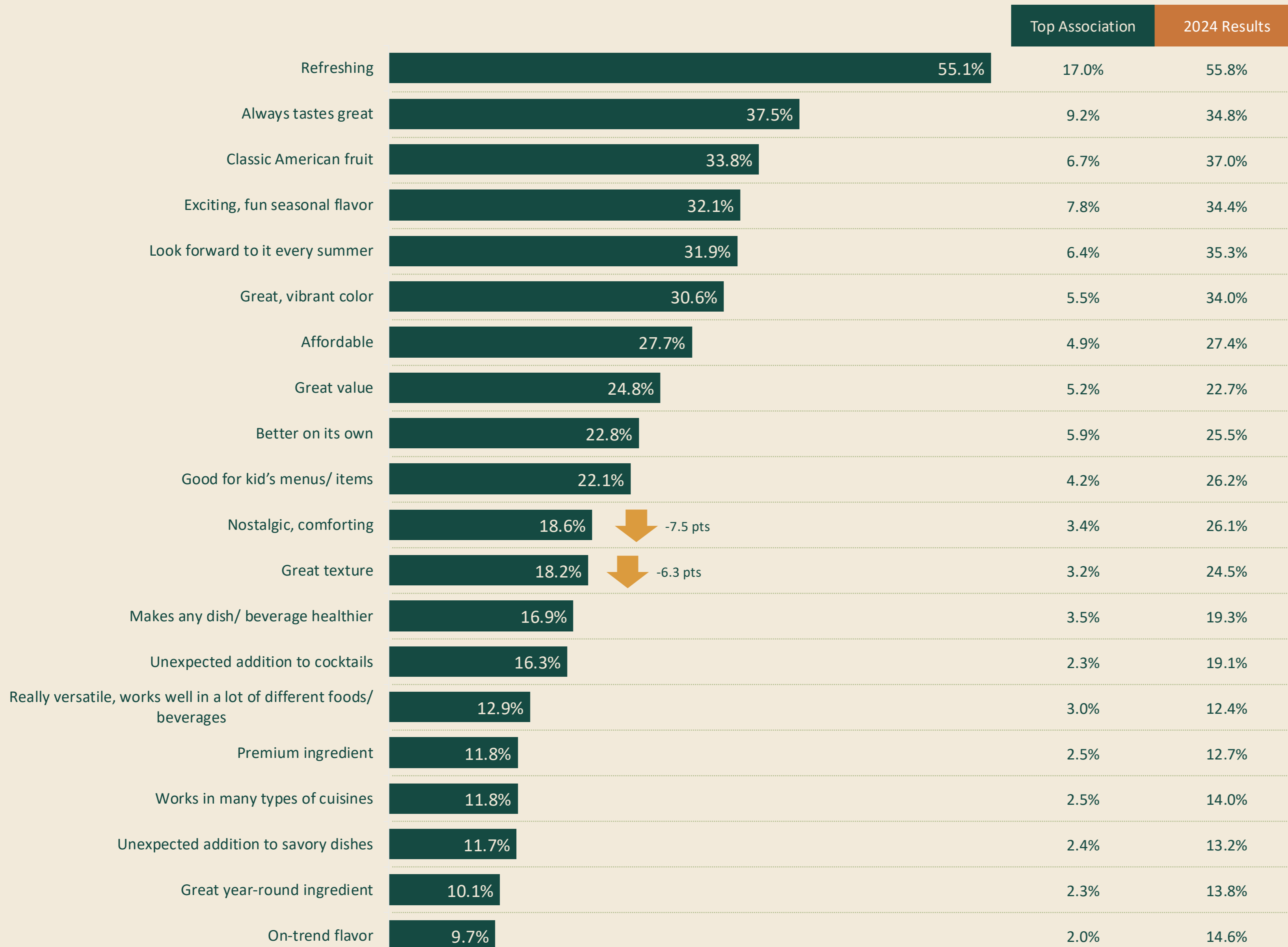
By contrast, younger consumers find watermelon joyful and energizing as well as inspiring and intriguing.

### Key Takeaway:

Younger generations associate watermelon with joy, energy and even a sense of adventure, intrigue and inspiration. While nostalgia is a legitimate emotional need and state that can be leveraged, positioning watermelon more effectively against these other emotions could support more meaningful and impactful innovation.

## Top of Mind Associations

When thinking about foods and beverages that feature fresh watermelon, which of the following do you closely associate with those types of options when ordering food at a restaurant? Please select all that apply. (n=1055)



NOTE: Arrows identify statistically significant changes.

## There's no doubt watermelon is considered refreshing

This association with “refreshing” was strongly evident in the social listening findings as well. In fact, “refreshing” is associated with watermelon far more than any other attribute or element listed at left.

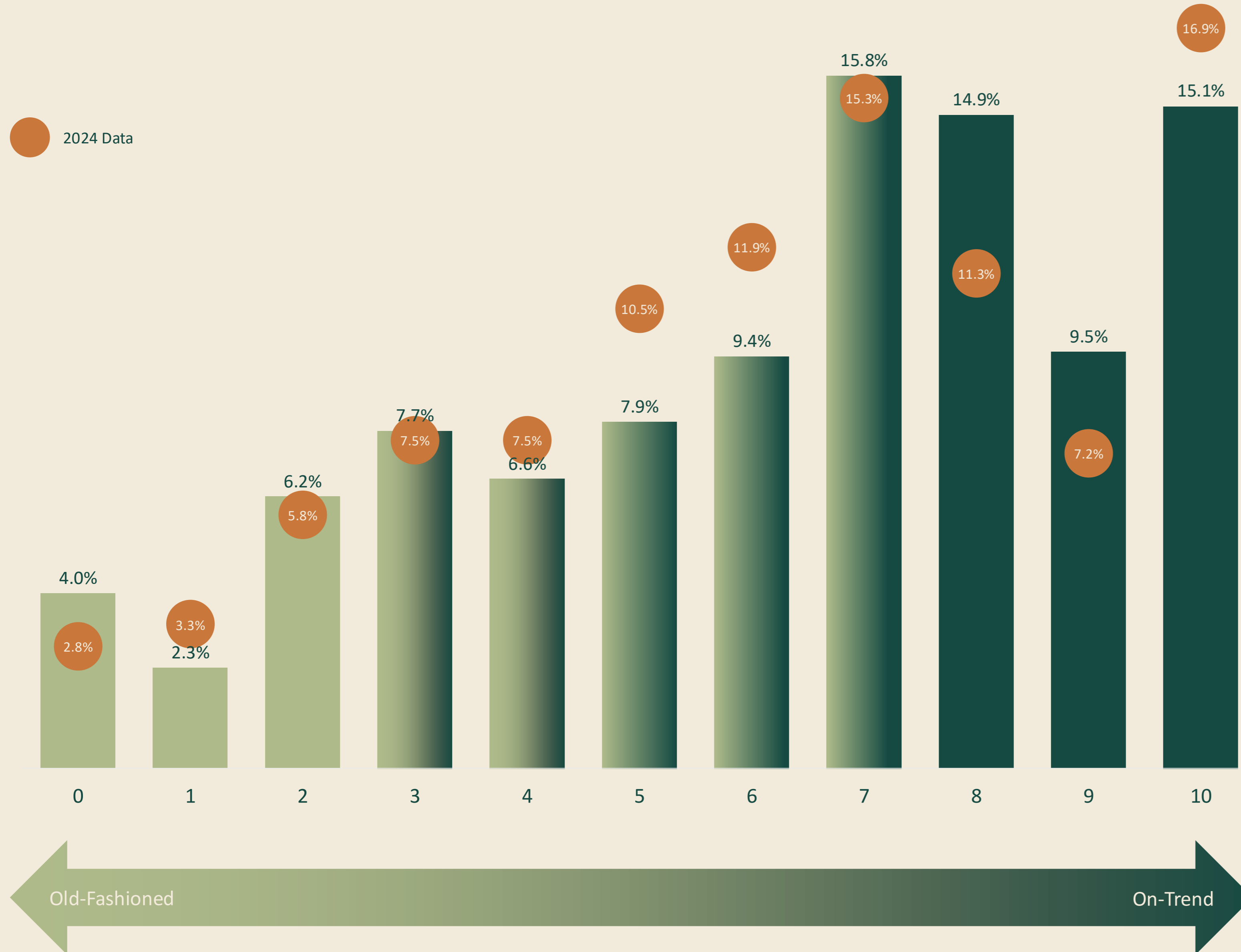
The relative association of each with watermelon is similar across generational cohorts with some small exceptions. That said, there are elements for Gen Z and younger Millennials that are far more closely associated with watermelon than for older generations. These include **great/ vibrant color, great value** and **great texture**. Color, in particular, is an attribute that engages younger consumers as has been seen with other vibrant ingredients such as pandan, ube, pitaya and turmeric. In fact, for younger consumers “great, vibrant color” is the third most closely associated attribute.

### Key Takeaway:

Innovating against the refreshing nature of watermelon is easy and will speak to nearly all consumers. For younger consumers, however, celebrating the distinct and vibrant color of watermelon ties it to several other ingredients to which these consumers have flocked. Help operators develop items that enhance this color to attract and excite younger consumers.

## Old-Fashioned vs On-Trend Perceptions of Watermelon

Consider the scale below. When you think of fresh watermelon, where would you place it on this scale? (n=1052)



## Some indications that watermelon is breaking away a bit from its nostalgic connection

And that’s not necessarily a bad thing. While it is still associated with nostalgia, that association appears driven more by older consumers while younger consumers are embracing watermelon for its more on-trend, innovative presentations.

There’s been a sizable shift toward perceiving watermelon as “on-trend,” which is largely a younger consumer perception.

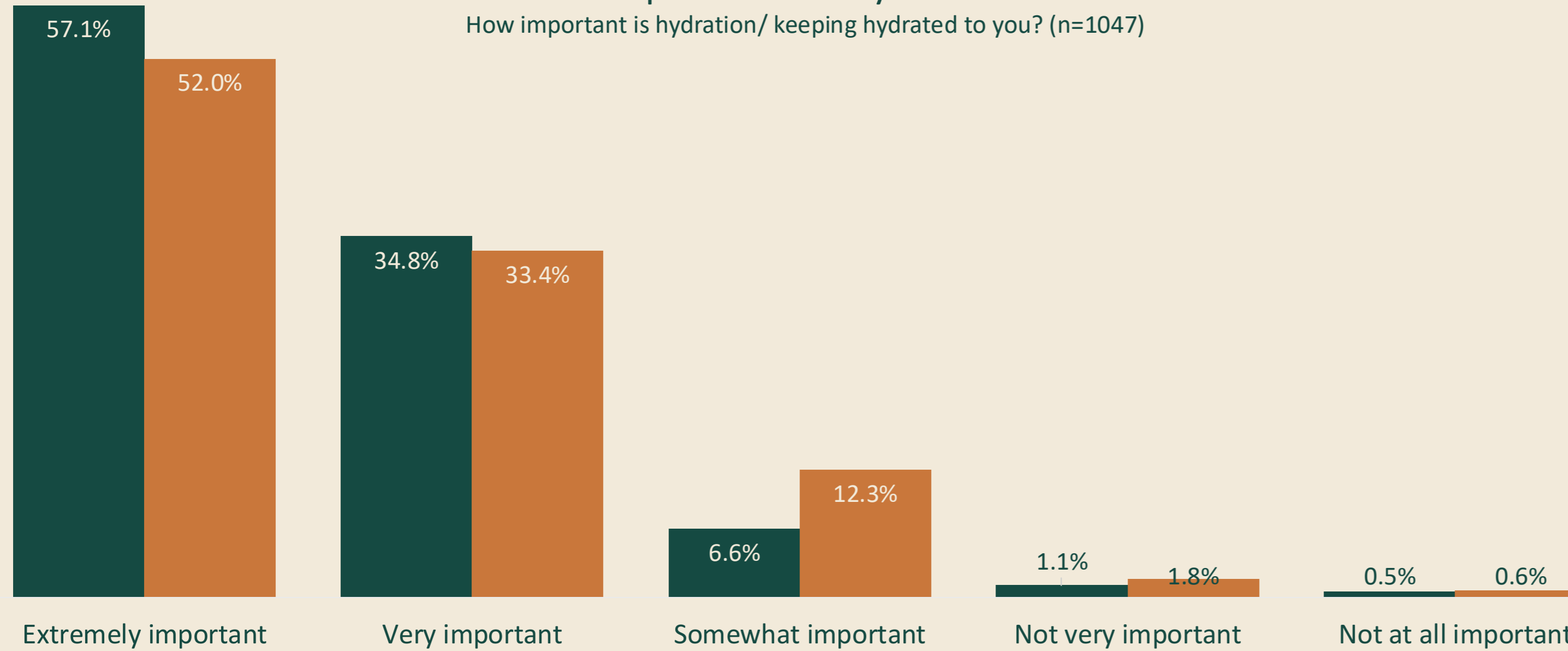
### Key Takeaway:

Operators targeting younger consumers should focus on creating exciting, innovative offerings featuring watermelon rather than relying or falling back on nostalgia, which appears to engage them far less. Of course, some nostalgia can do double duty – presenting nostalgic to older consumers but new and inventive to younger consumers – but given the prevalence of nostalgia over the past few years that is likely become less effective.

	Average Score	
	2025	2024
Gen Z	7.0	6.1
Millennials	6.8	6.5
Gen X	5.8	6.8
Total	5.5	6.3

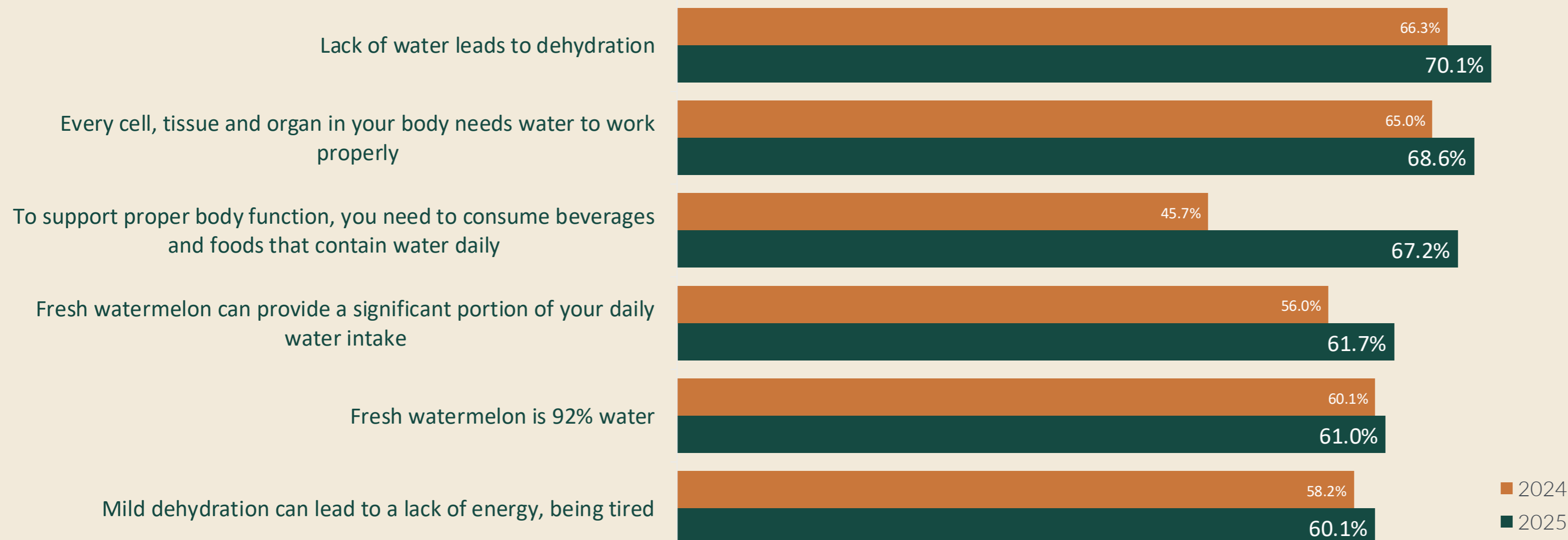
## Importance of Hydration

How important is hydration/ keeping hydrated to you? (n=1047)



## Hydration Awareness & Watermelon

Which of the following do you believe to be true? Please select all that apply. (n=1047)



# Hydration is a critical functional benefit for consumers

Nearly all consumers believe hydration is either extremely or very important.

Additionally, consumers increasingly understand both the negative impacts of dehydration and the positive benefits of proper hydration to a host of systems and organs.

What continues to lag is the association of watermelon as being 92% water and its ability to keep individuals hydrated in a flavorful way.

### Key Takeaway:

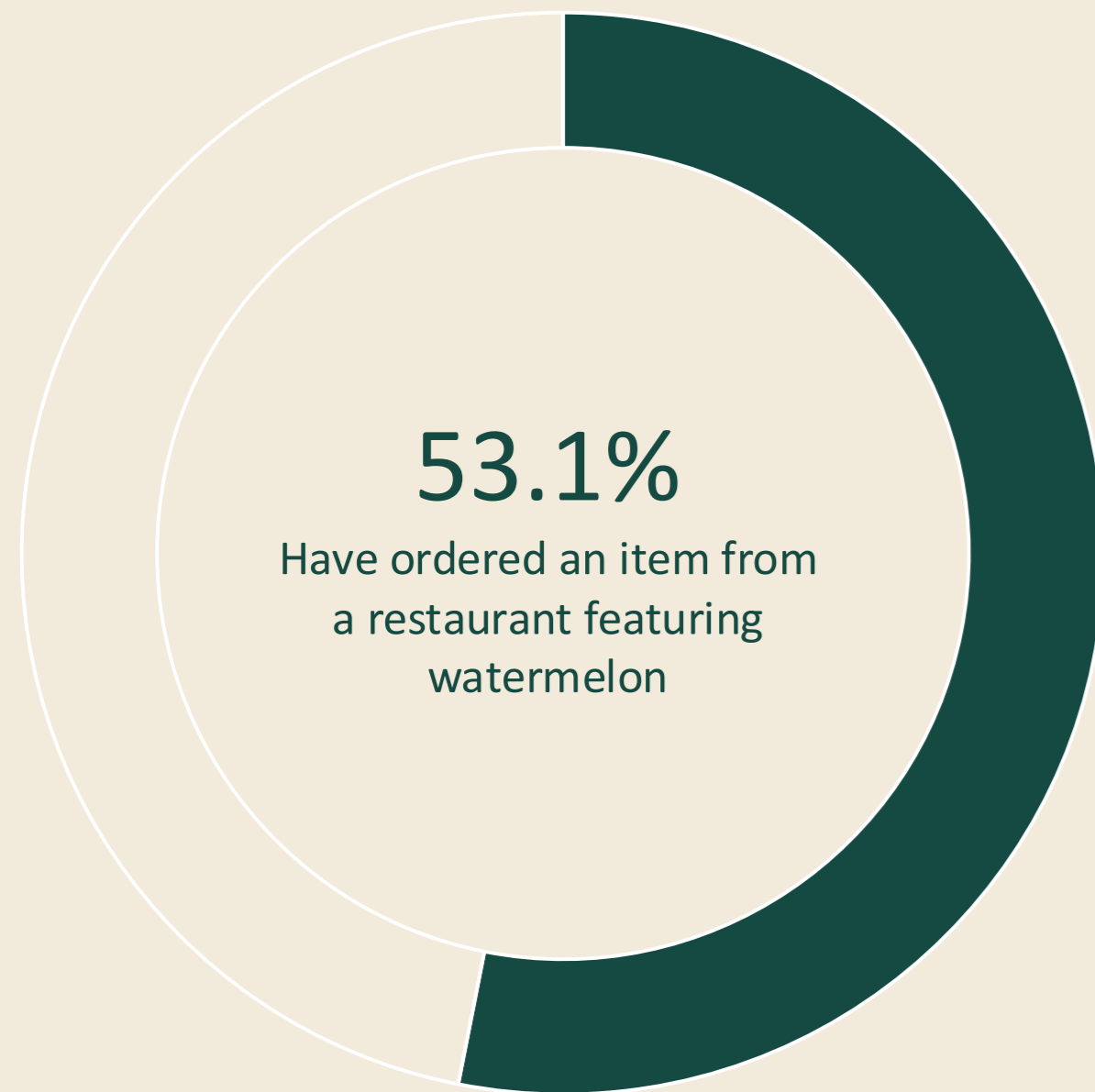
While hydration continued to come up in the social listening findings, there is plenty of room for continued growth and strengthening of the tie between watermelon and hydration and, in turn, with the positive functional benefits of proper hydration.



# WATERMELON AWAY FROM HOME

# AFH Ordering of Food/ Beverage Items Featuring Watermelon

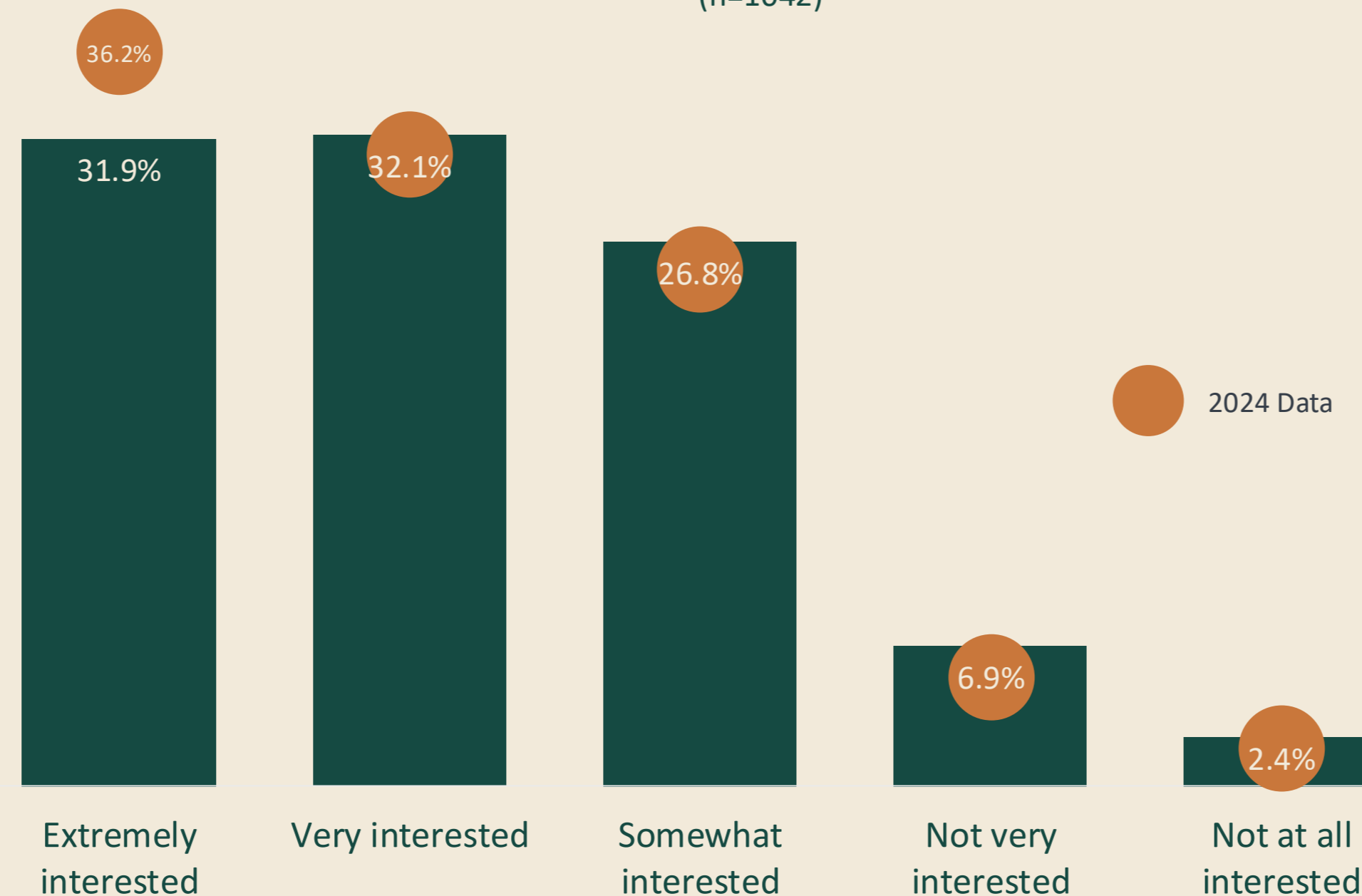
Have you ordered a food or beverage item from a restaurant that incorporated fresh watermelon or was watermelon flavored within the past six months? (n=1042)



This is a statistically significant decline from the 61.5% observed in 2024, and a drop below 2022's level of 53%.

## Interest in Fresh Watermelon AFH

How interested are you in seeing your favorite restaurants feature food and/or beverage items that are made with fresh watermelon? This does not include any beverage or food product that may reference "watermelon flavor" but is not made with fresh watermelon. (n=1042)



## Decline in ordering, but continued interest

Despite increases in menuing of watermelon, the share of consumers having ordered watermelon in the past six months dropped to 53.1% in 2025 from 61.5% in 2024. This is a statistically significant decline.

This decline occurred despite continued strong interest in away from home (AFH) availability of watermelon. Though there was a slight decline in those "extremely interested," the share of those indicating "very" or "somewhat" interested increased, while the share of those uninterested remained extremely low.

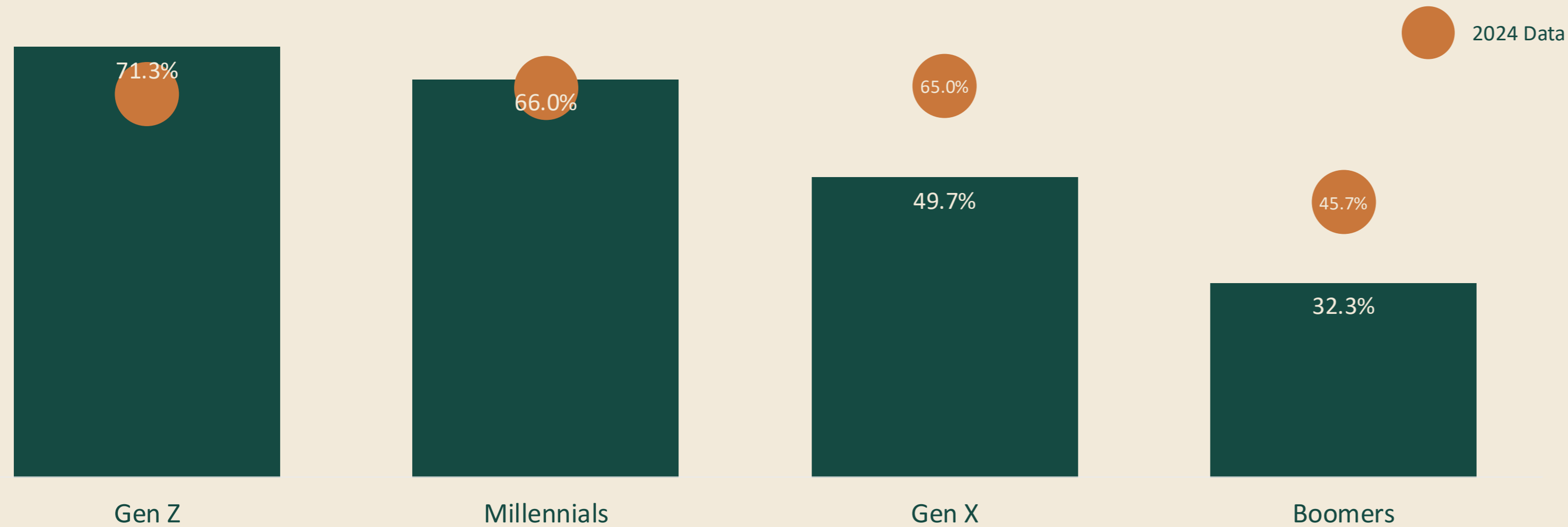
It's important to note that away from home visitation declined (slide 5) which also may have led, in part, to this decline.

### Key Takeaway:

Other findings within this report suggests a lack of engaging or exciting innovation may be depressing ordering behavior despite increased availability (per the menuing report completed for NWPB). With interest remaining high, it is critical operators understand the need for innovation, particularly for younger consumers.

## AFH Ordering of FOOD Items Featuring Watermelon – % Have Ordered

Have you ordered a food or beverage item from a restaurant that incorporated fresh watermelon or was watermelon flavored within the past six months? (n=1042)



## Younger consumers increasing ordering and interest

Over the past few years, younger consumers have consistently shown growing ordering incidence and interest in ordering fresh watermelon AFH.

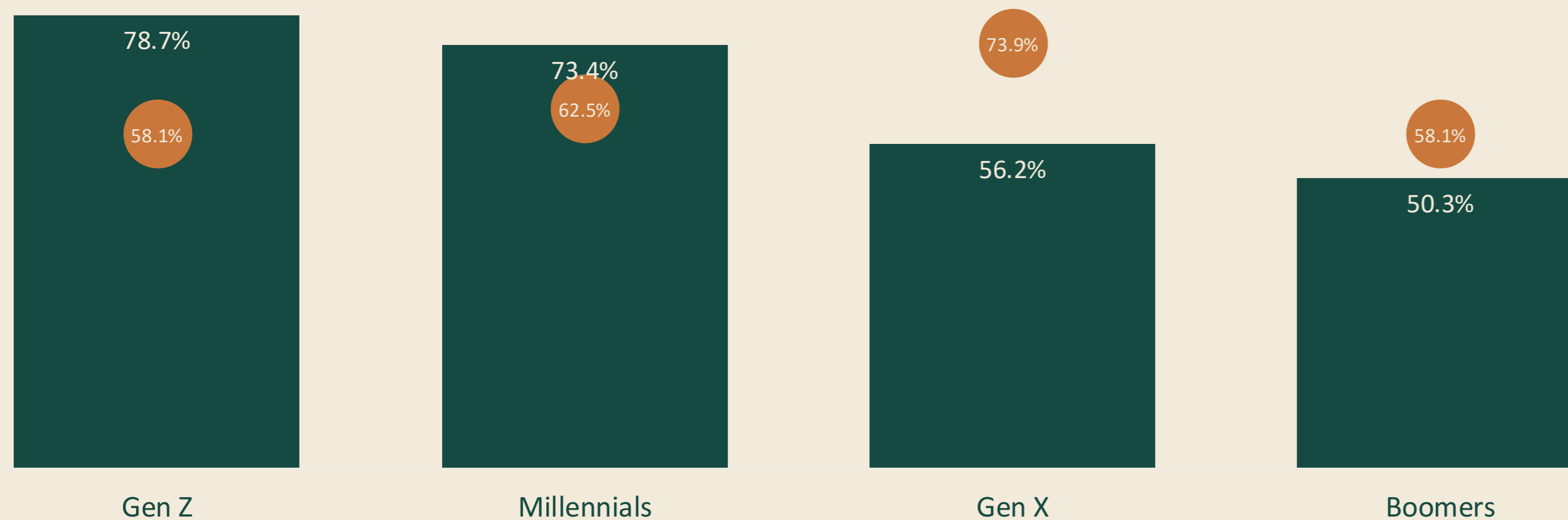
Declines in ordering appear driven exclusively by Gen X and Boomers, who have stepped away from watermelon both in ordering and interest.

### Key Takeaway:

While creating broad appeal for watermelon is preferable, ensuring ongoing interest and engagement from younger consumers will future-proof watermelon's position away from home.

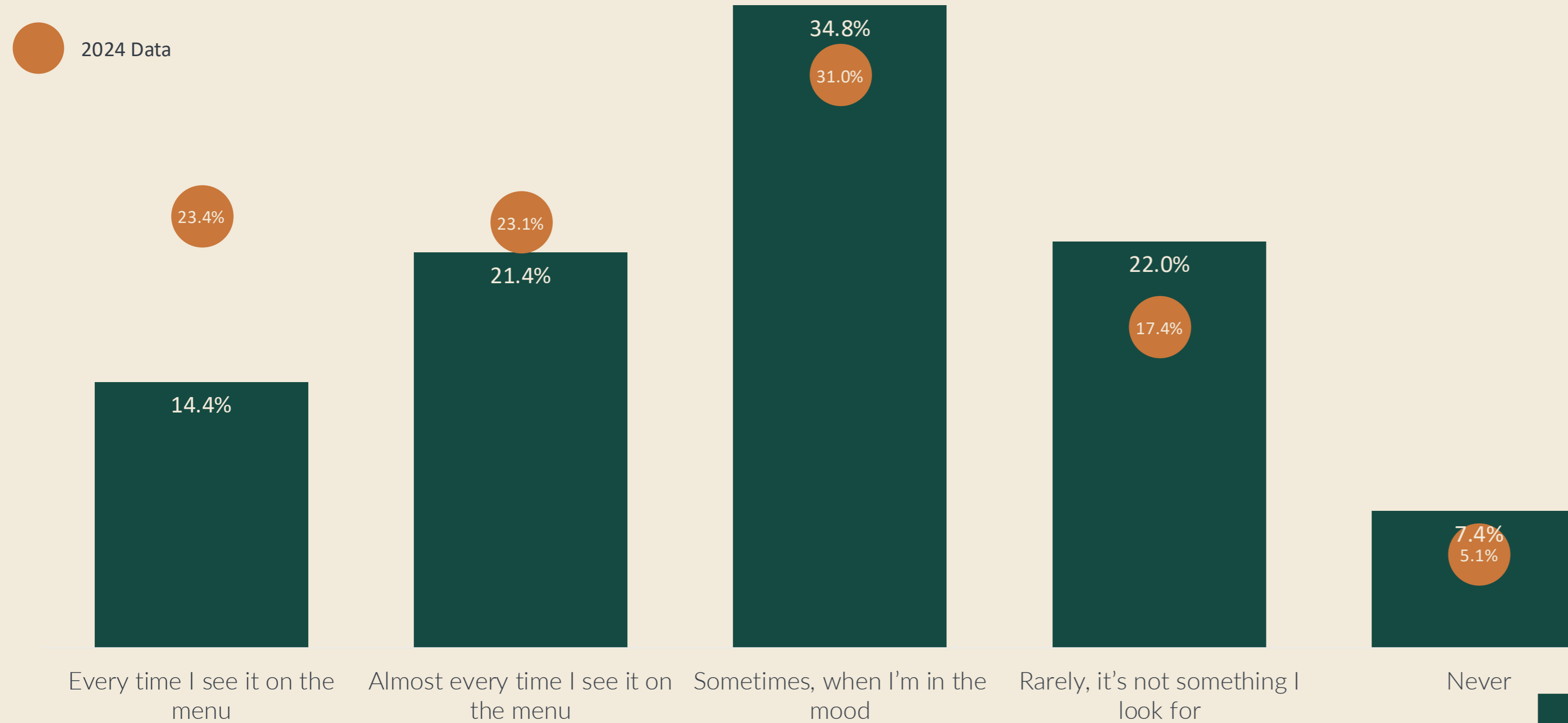
## Interesting in Fresh Watermelon AFH – Extremely/ Very Interested

How interested are you in seeing your favorite restaurants feature food and/or beverage items that are made with fresh watermelon? This does not include any beverage or food product that may reference "watermelon flavor" but is not made with fresh watermelon. (n=1042)



## Frequency of Ordering FOOD Featuring Fresh Watermelon

How often do you order FOOD OPTIONS at restaurants that include fresh watermelon? This would include appetizers, sides, salads, main entrées and desserts made with fresh watermelon (not just watermelon flavor). (n=1042)



What would make you more likely to order food items with fresh watermelon?

	2025	2024
Fresh watermelon as a garnish	29.5%	16.7%
Watermelon featured in more savory snacks, light bites, sides	24.9%	--
Nothing	20.7%	41.7%
Watermelon featured in more portable, on-the-go items	16.1%	--
More unique preparations	15.1%	10.0%
More innovative flavors paired with fresh watermelon	14.1%	16.7%
More innovative foods featuring watermelon	13.8%	11.7%
More nostalgic foods featuring fresh watermelon	9.5%	13.3%

## Frequency of ordering food featuring fresh watermelon away from home has increased significantly

While the changes in those who never order food with fresh watermelon are not statistically significant, the declines in the higher-end frequency are.

In part, this may be driven by changes in overall AFH behavior, but ensuring menuing and innovation keep up with consumer demands and needs is critical.

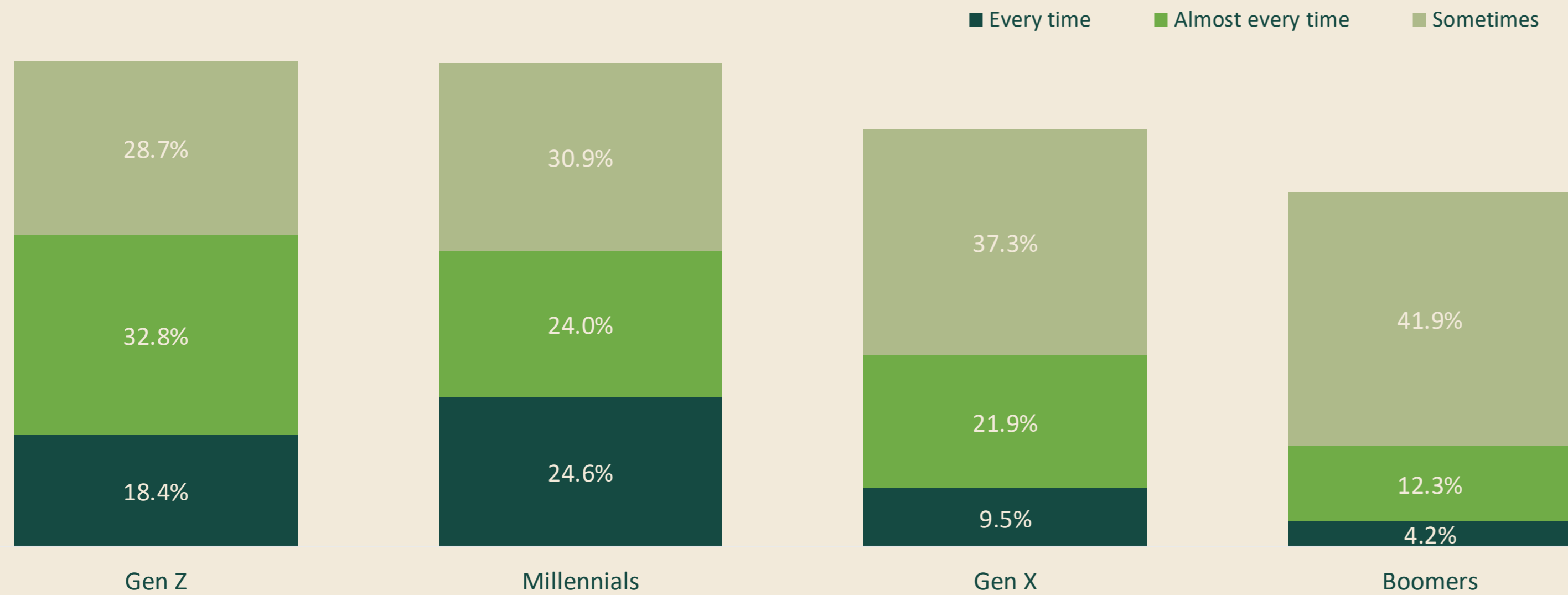
While offering fresh watermelon as a garnish may help drive additional ordering, snacks, light bites and sides are an area of innovation opportunity, particularly with appetizers and sides the second and third most common type of application for watermelons on menus. For younger consumers, there is particular interest in savory snacks/ light bites, portability and innovative foods.

### Key Takeaway:

Some decline in ordering may be a function of the challenging environment restaurants currently find themselves, but some may be due to menuing that is not encouraging increased ordering (e.g. a lack of innovation). Appetizers, small bites, snacks and sides all offer excellent menuing and innovation opportunities for watermelon, particularly for more inventive watermelon dishes, with smaller portion sizes (and lower price points) facilitating greater experimentation.

## Frequency of Ordering FOOD Featuring Fresh Watermelon

How often do you order FOOD OPTIONS at restaurants that include fresh watermelon? This would include appetizers, sides, salads, main entrées and desserts made with fresh watermelon (not just watermelon flavor). (n=1042)



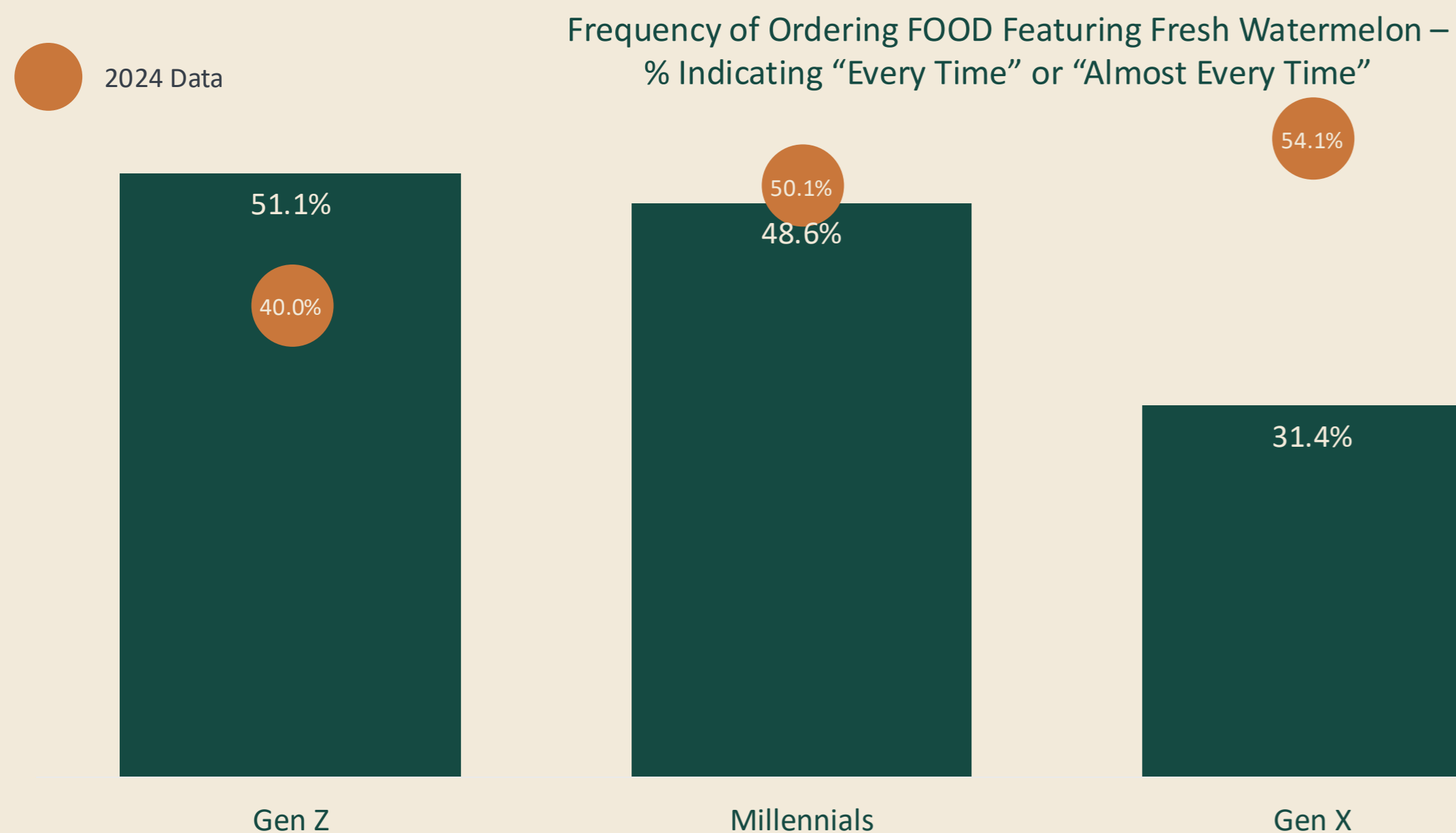
## Gen Z continue to increase the frequency of their watermelon ordering away from home

Gen Z and Millennials have far higher ordering frequencies for watermelon than either Gen X or Boomers, though Millennials are somewhat more likely to order watermelon every time it's available.

Gen Z, however, has significantly grown its overall frequency, from 32.4% ordering sometimes or more often to 51.1% in 2025. Millennials, by contrast, have held steady while Gen X and Millennials have continued to decline in ordering frequency.

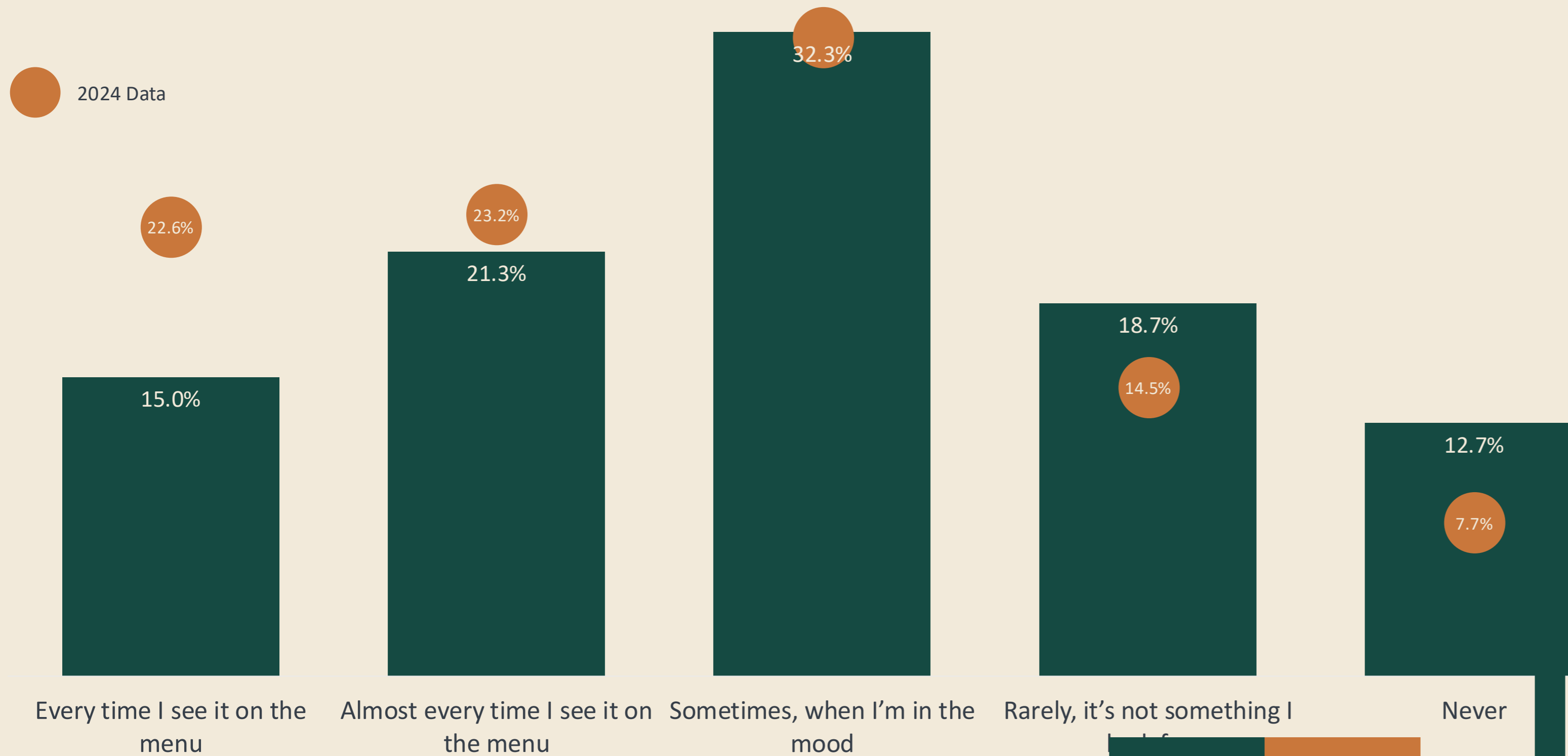
### Key Takeaway:

Though efforts to stem any additional decline in older consumer ordering could be helpful, focusing on encouraging and continuing to engage Gen Z will pay off in the long-term and support ongoing growth in watermelon for a longer period than will focusing on older consumers.



## Frequency of Ordering BEVERAGES Featuring Fresh Watermelon

How often do you order BEVERAGE OPTIONS at restaurants that include fresh watermelon? This would include juices, smoothies, cocktails and any other beverage options. (n=1037)



What would make you more likely to order beverage items with fresh watermelon?

	2025	2024
Nothing	33.0%	49.5%
Fresh watermelon used as a garnish	23.3%	12.1%
Fresh watermelon featured as a primary flavor/ ingredient	20.3%	11.0%
More adult-style beverages featuring fresh watermelon	17.3%	12.1%
More cocktails/ alcoholic beverages featuring fresh watermelon	17.0%	9.9%
More innovative beverages featuring fresh watermelon	16.7%	9.9%
More unique flavors paired with fresh watermelon	16.4%	16.5%
Fresh watermelon inspired by/ featuring global flavors	9.4%	9.9%

## Beverage ordering frequency declined at a slightly lower rate than food

Despite the popularity and importance of beverages now, order frequency of beverages featuring fresh watermelon declined. As with food, part of this decline may be driven by declines in AFH visitation overall.

Though the largest share of consumers noted nothing would get them to increase their ordering of fresh watermelon beverages, that share dropped significantly from 2024.

Instead, more consumers are embracing the idea of fresh watermelon as a garnish and as a primary flavor/ ingredient. For younger consumers, the focus is on fresh watermelon paired with unique flavors and more innovative beverages featuring fresh watermelon.

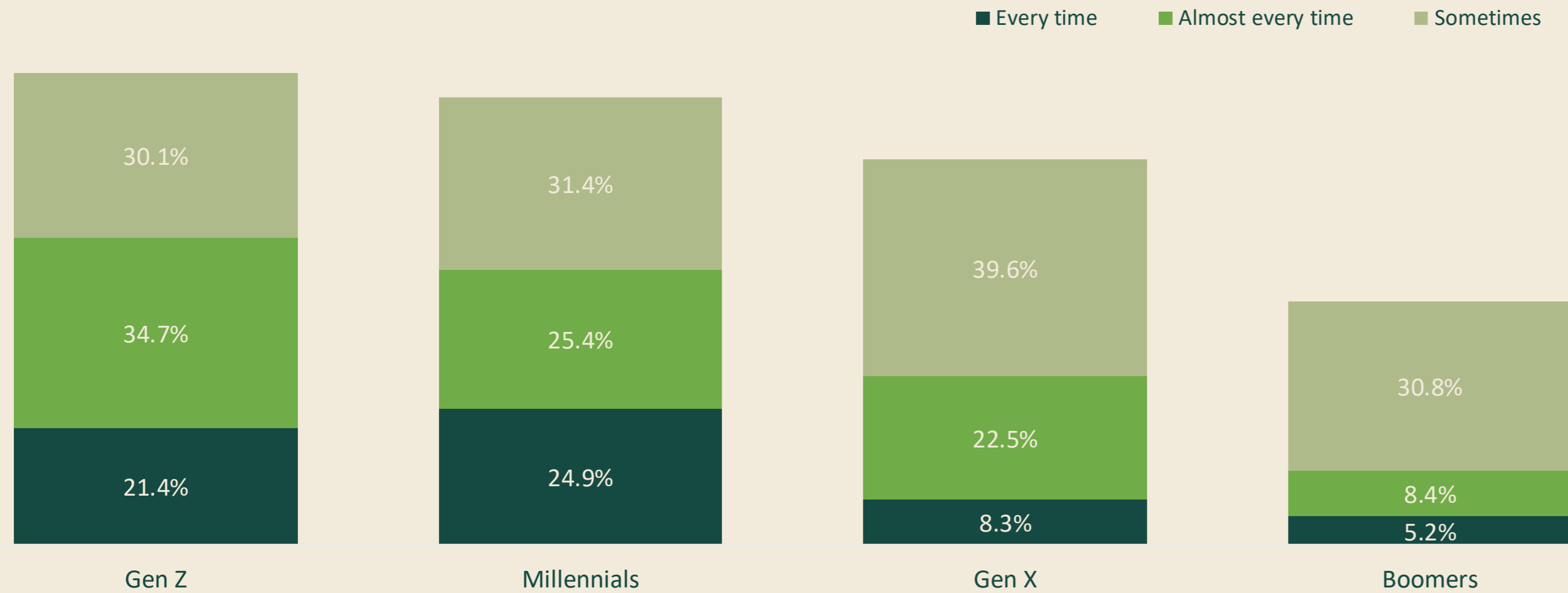
It's also interesting to note that more consumers now indicate they are interested in seeing fresh watermelon in adult and in alcoholic beverages despite declines in alcohol consumption. In fact, Gen Z was particularly interested in fresh watermelon in alcoholic beverages.

### Key Takeaway:

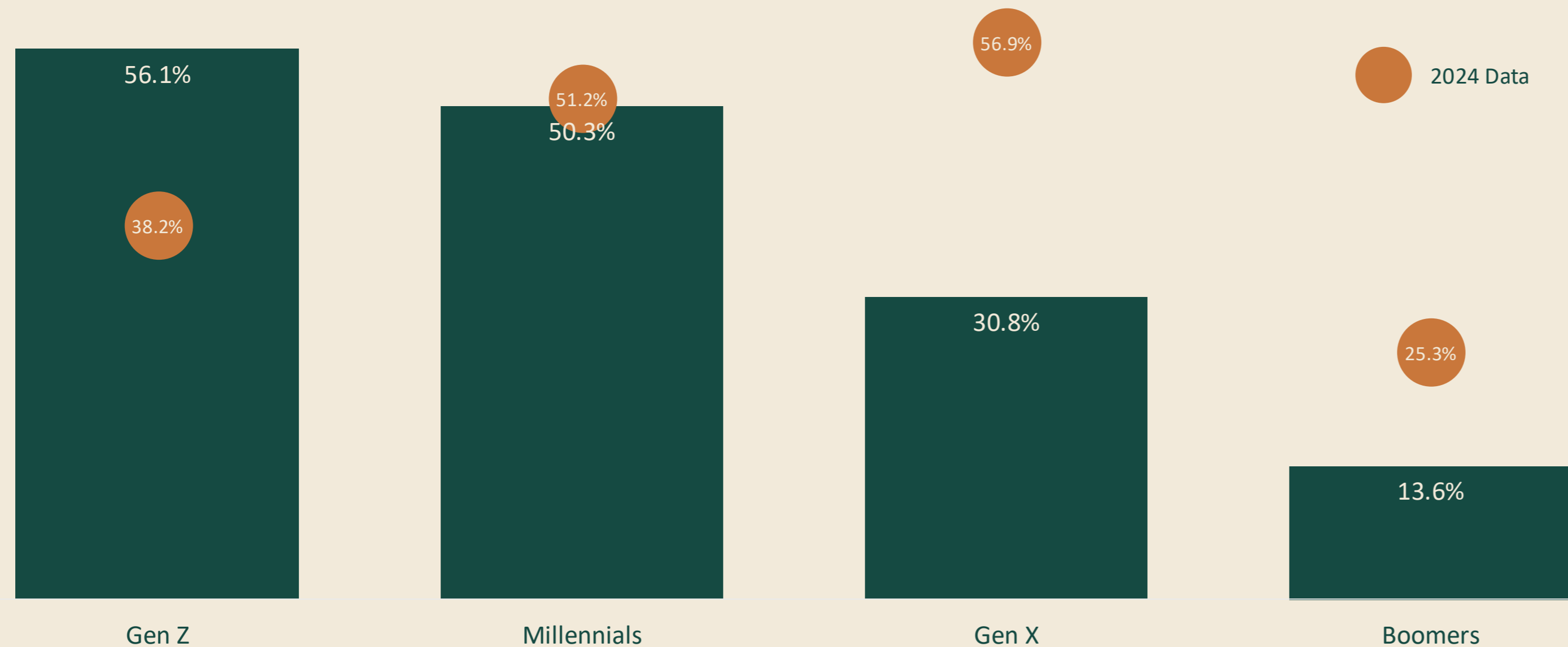
In the beverage categories, fresh watermelon can shine both as a primary ingredient and a garnish, which can often signal freshness and quality to consumers. In particular, watermelon's vibrant color – so appealing to younger consumers – can take center stage. Innovation in beverages is critical as the importance of this category to operators and the appeal to younger consumers continues to grow.

## Frequency of Ordering BEVERAGES Featuring Fresh Watermelon

How often do you order BEVERAGE OPTIONS at restaurants that include fresh watermelon? This would include juices, smoothies, cocktails and any other beverage options. (n=1037)



### Frequency of Ordering BEVERAGE Featuring Fresh Watermelon – % Indicating “Every Time” or “Almost Every Time”



## Gen Z fully embraces fresh watermelon in beverages

While 2022 to 2024 saw little change in Gen Z ordering of beverages featuring fresh watermelon, that changed over the past year. The order frequency of beverages featuring fresh watermelon within this generation increased significantly.

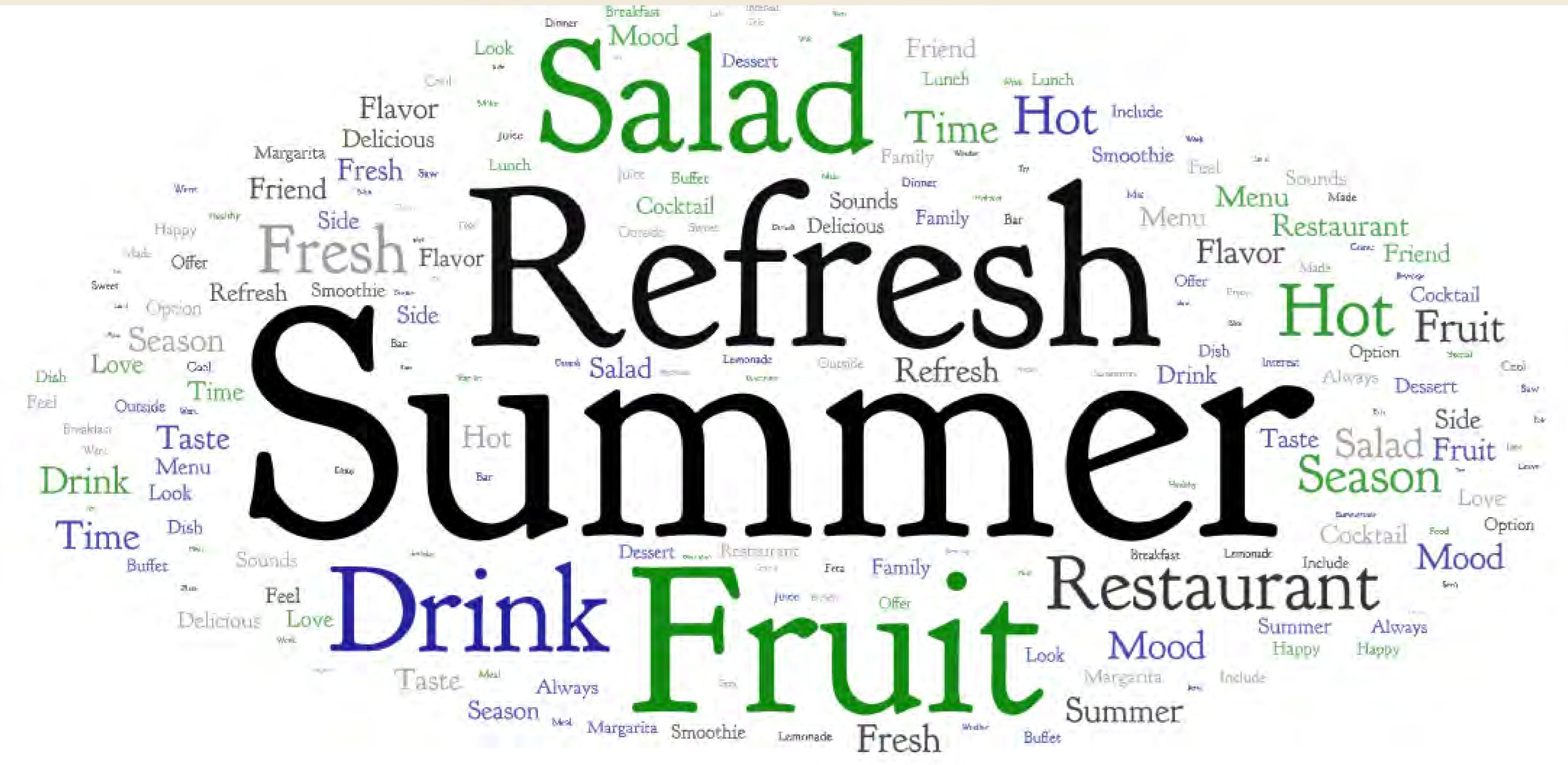
Decreases in order frequency overall were driven entirely by older generations, who appear to have turned away from fresh watermelon in beverages and/ or have significantly decreased their away from home visitation rates.

#### Key Takeaway:

Beverage innovation within the past year appears to have captured the engagement and excitement for fresh watermelon among Gen Z consumers, while Millennials held steady. Ensuring these generations are excited by beverage innovation featuring fresh watermelon is critical for a number of reasons and can help drive both volume and future engagement with fresh watermelon away from home.

## Watermelon Order Drivers at Restaurants

Think about the last time you ordered something with watermelon at a restaurant. What was the specific situation that made you choose that item (such as the season, your mood, who you were with, the description of the item, etc.)? (n=1037)



## Summer and refreshing are indelibly linked to watermelon

Consumers continue to connect watermelon with summer and refreshment.

Salads, of course, are also tied closely to watermelon and drive order, but this may be as much due to the prevalence of watermelon feta salads, with plenty of opportunity to innovate against new watermelon salad options.

Beverages also drive watermelon ordering, from nonalcoholic to cocktails.

Summer at a restaurant, it was very hot and watermelon sounded very perfect.

This summer I went to a food festival and there were food trucks and at one of the truck they had watermelon and burgers.

It was a hot day and the drink with watermelon sounded refreshing.

I ordered a smoothie that had watermelon in it. I was in the mood for something sweet since it was hot outside. It was refreshing and well needed.

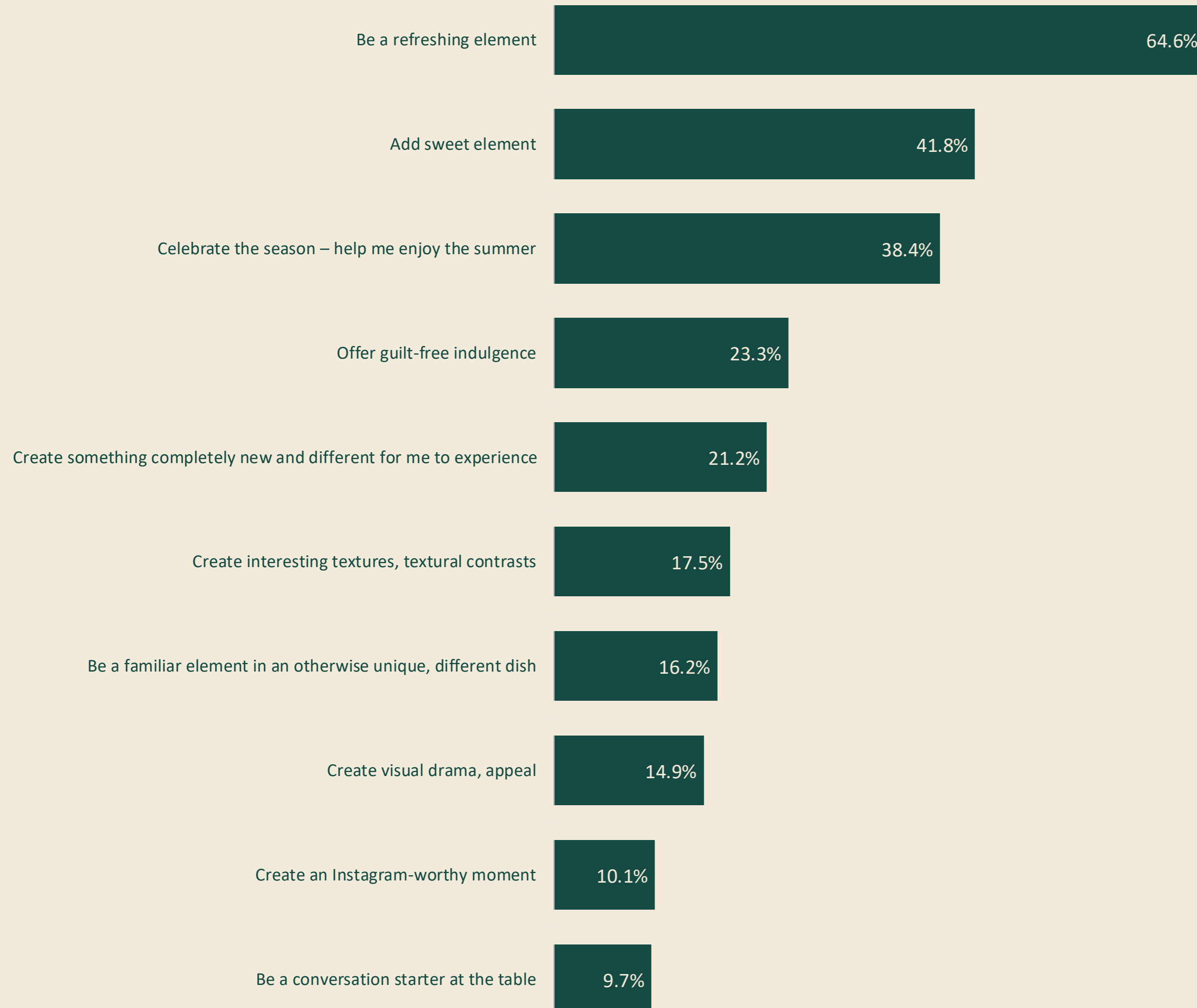
Because it's pretty amazing.

It was a warm spring day, I was down at a beach and figured I'd try something to fit the occasion.

Recently, I visited a café and had fresh watermelon juice. It sounded like a very healthy option, and it was a nice shift from drinking bottled water. It tasted very fresh, but not overly sweet, which made me feel that it was a healthy drink.

## Watermelon's Role in Meals

When you're dining out, what role do you want watermelon to play in your meal? Please select all that apply. (n=1035)



## Again, watermelon is the refreshing item of choice.

Watermelon, more than anything else, serves as the refreshing element in a dish, which serves to confirm the strong tie consumers have between watermelon and refreshing.

Watermelon also adds a sweet element, but often not “too sweet” for many consumers, which keeps it from overwhelming other elements.

Additionally, and as has been proven in past studies, watermelon is strongly tied to the summer. This is not only true because it is at peak but watermelon helps people celebrate everything summer is including get together, being outside, having time off, and relaxing.

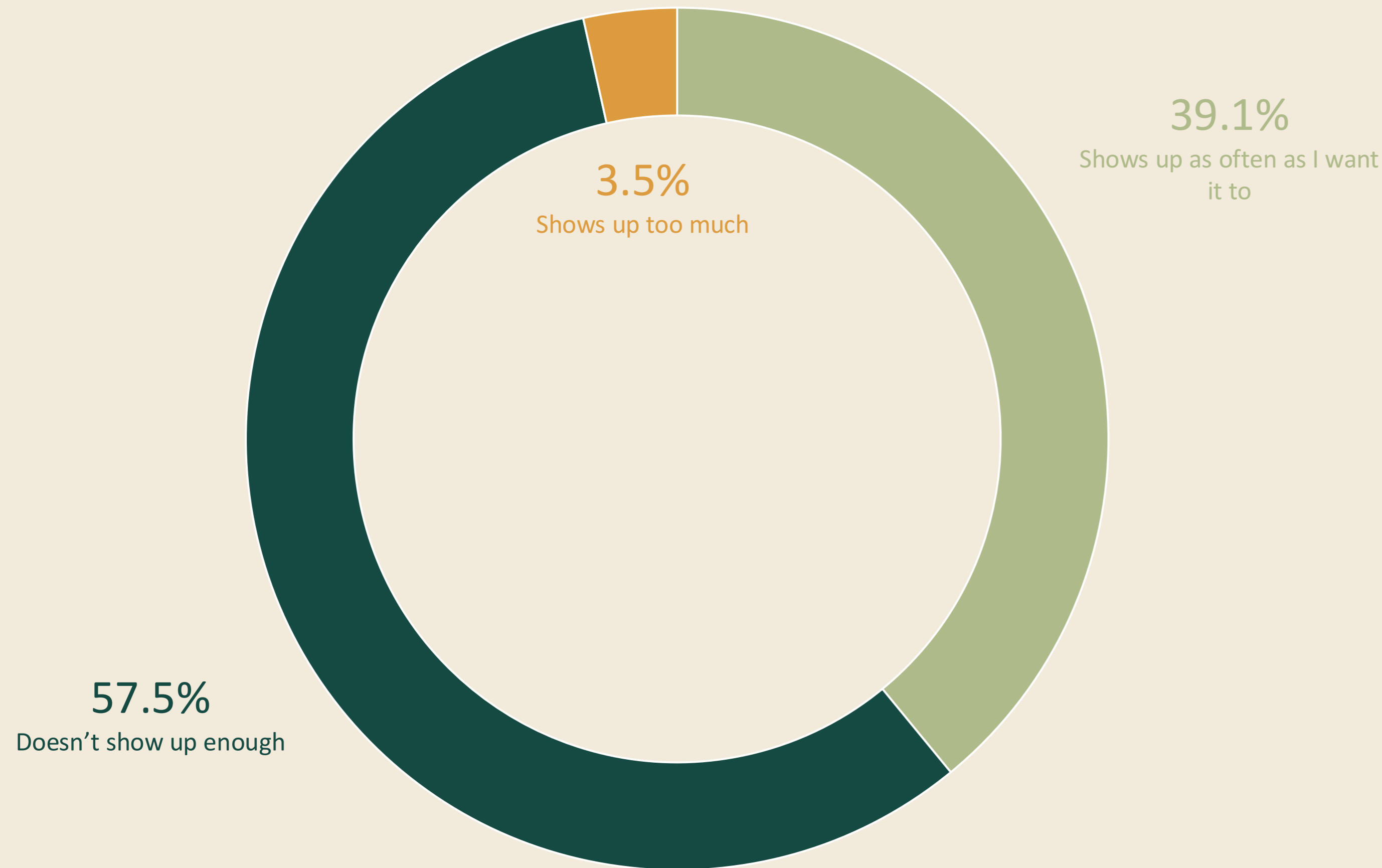
Younger consumers are significantly more interested in how watermelon can create textural contrasts and be a familiar element in an otherwise unique dish.

### Key Takeaway:

While there's no doubt innovation can leverage watermelon's refreshing characteristics, innovation at restaurants have likely not tapped into how watermelon can be a guilt-free indulgence and the base of something new and different. All of this can be accomplished while allowing watermelon to act as a summer surrogate in dishes.

## Perceptions of Fresh Watermelon Availability on Menus

Which of the following is true for you? (n=1034)



	Shows up as often as I want it to	Doesn't show up often enough	Shows up too much
Gen Z	44.8% (+15.3 pts)	50.0% (-8.2 pts)	5.2% (-7.2 pts)
Millennials	50.6% (+14.2 pts)	45.7% (-11.0 pts)	3.7%
Gen X	28.4% (-16.5 pts)	70.4% (+20.3 pts)	1.2%
Boomers	29.7%	67.1%	3.2%

## Operators have plenty of runway to innovate and menu fresh watermelon more

Consumers continue to want to see more fresh watermelon on the menu. That has been true for the past few years, and remains true today.

For younger consumers, though, things get a bit trickier. With their significant increases in ordering may have come a balance point with regard to how much watermelon is being menued. That said, half or nearly half of younger consumers still want to see more so we have certainly not reached saturation even with these highly engaged consumers.

Though Gen X may have pulled back significantly from watermelon over the past year it may have been due to a lack of perceived availability or a lack of availability of options that particularly appeal to this group.

### Key Takeaway:

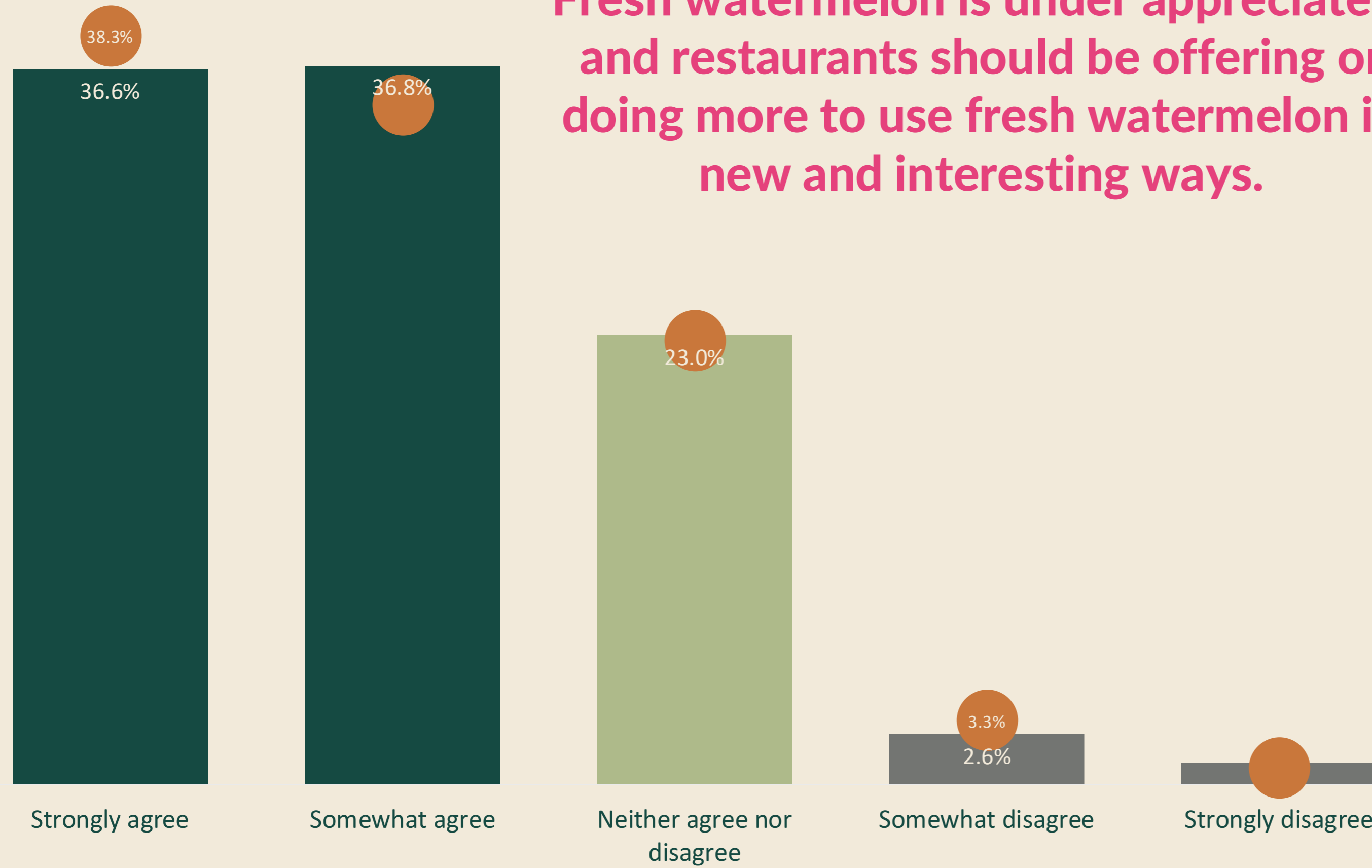
As innovation with watermelon continues and expands, it will be important to ensure watermelon doesn't become over-saturated too quickly which would lead to premature burnout. The key is to celebrate what watermelon stands for and even to embrace its limited availability and "height of the season" freshness and quality to avoid complacency and backlash.

## Belief Watermelon is Under Appreciated

To what degree do you agree with the following statement: (n=1034)

2024 Data

**Fresh watermelon is under appreciated, and restaurants should be offering or doing more to use fresh watermelon in new and interesting ways.**



## Consumers continue to agree restaurants should be doing more

This is true across all generational cohorts, but more true for younger consumers. In fact, Gen Z is now significantly more likely than any other generation (excluding Millennials) in strongly agreeing with this statement. Additionally, this share is significantly higher than last year, supporting the significantly higher engagement among these consumers.

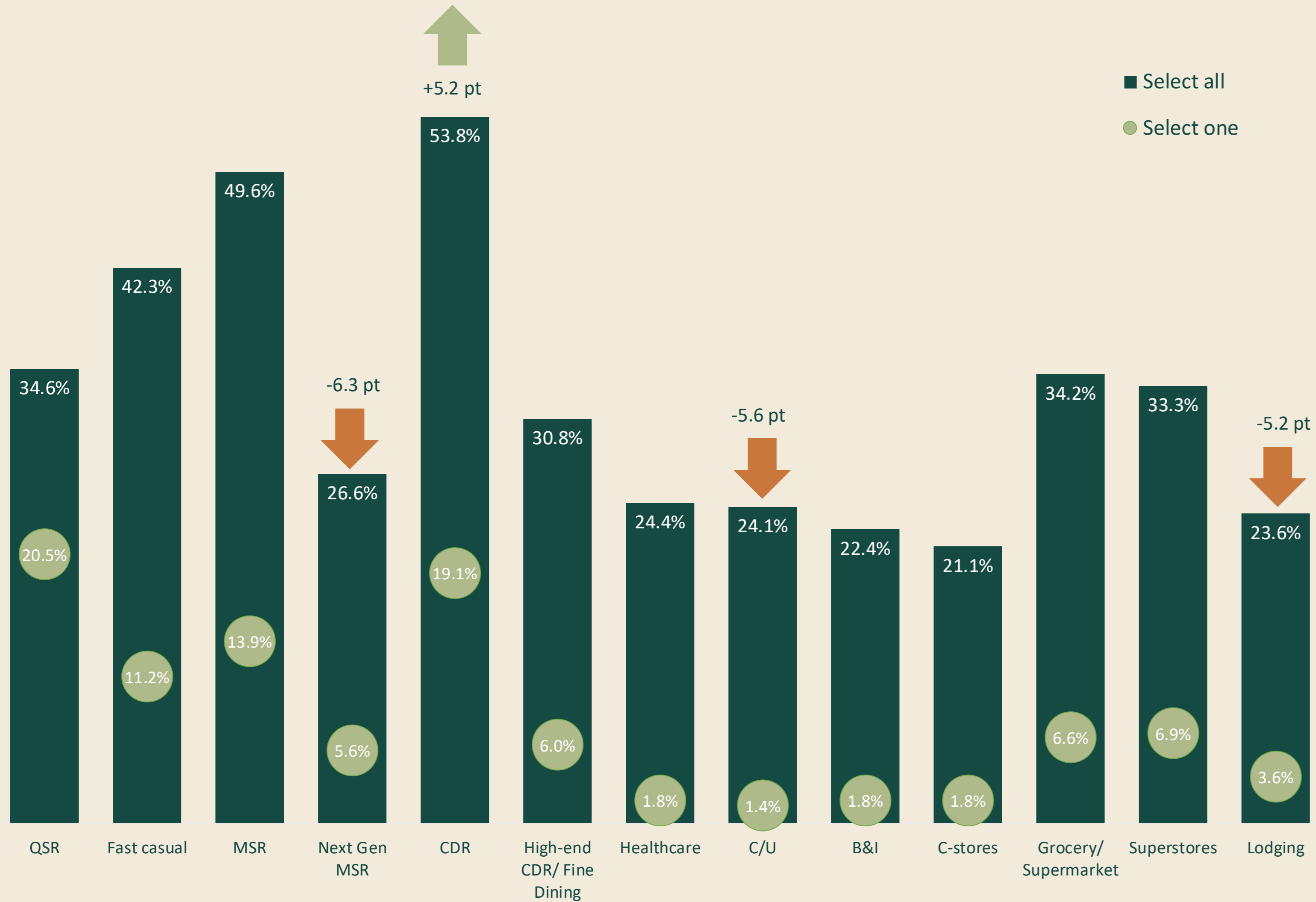
### Key Takeaway:

The softness evident in Gen Z's agreement with this statement disappeared this year, matching this generations general engagement and excitement with fresh watermelon. It could indicate that innovation with fresh watermelon has had a significant impact on their behavior. By contrast, this same innovation may have alienated older consumers who pulled back on their agreement. Their strong association of watermelon with nostalgia may be creating dissonance with some watermelon items now available.

Generation	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
Gen Z	40.2%	33.9%	21.8%	2.3%	1.7%
Millennials	42.0%	35.4%	20.3%	1.7%	0.6%
Gen X	30.2%	37.9%	27.8%	3.0%	1.2%
Boomers	31.3%	39.7%	23.9%	3.9%	1.3%

## Fresh Watermelon Preferences by Venue

At which of the following types of away from home venues would you like to see fresh watermelon featured in food and/ or beverages? Please select all that apply. (n=1031)



## Full service restaurants, fast casual restaurants and retail operators offer the growth greatest opportunities

Consumers are most likely to look for fresh watermelon menued at family-style operations (which speaks to the nostalgic elements of fresh watermelon as well as the appeal for Boomers), casual dining and fast casual restaurants. This has remained true since last year.

Supermarkets and superstores follow distantly, but may likely make up ground as consumers shift their behavior away from foodservice over the next year due to rising costs, inconsistent quality and service, and shifting hours.

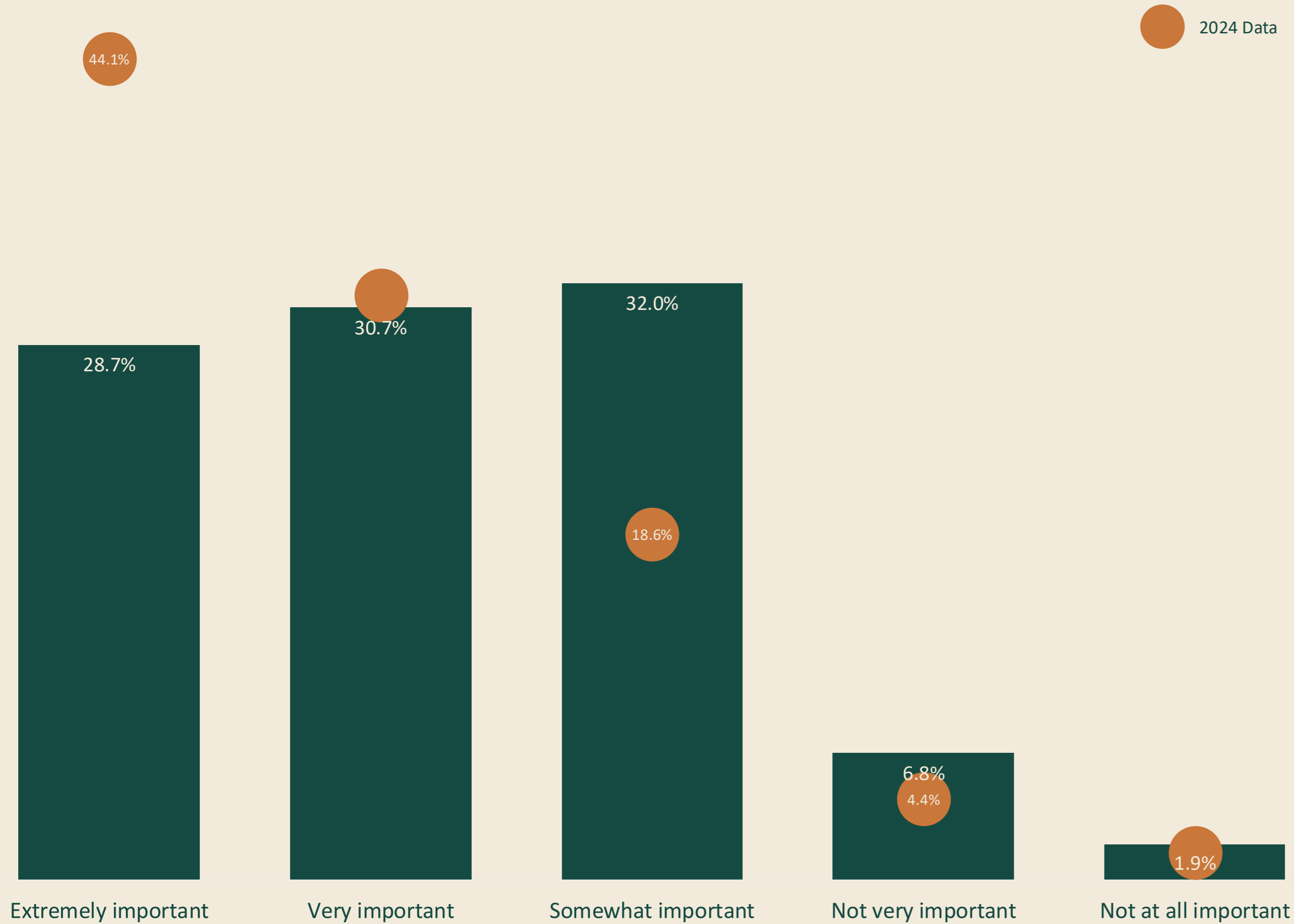
### Key Takeaway:

Should more fresh solutions (such as compressed watermelon) become available to operators, it will open opportunities in segments that struggle with labor and consistently handling fresh produce.

NOTE: Arrows identify statistically significant changes.

## Importance of Watermelon on Kids Menus

How important is it to you that fresh watermelon is featured on kid's menus? (n=1031)



## Parents have pulled back on emphasizing watermelon on kid's menus

There was a fundamental shift in the importance of watermelon on kid's menus, with nearly half indicating watermelon on kid's menus is extremely important versus last year.

### Key Takeaway:

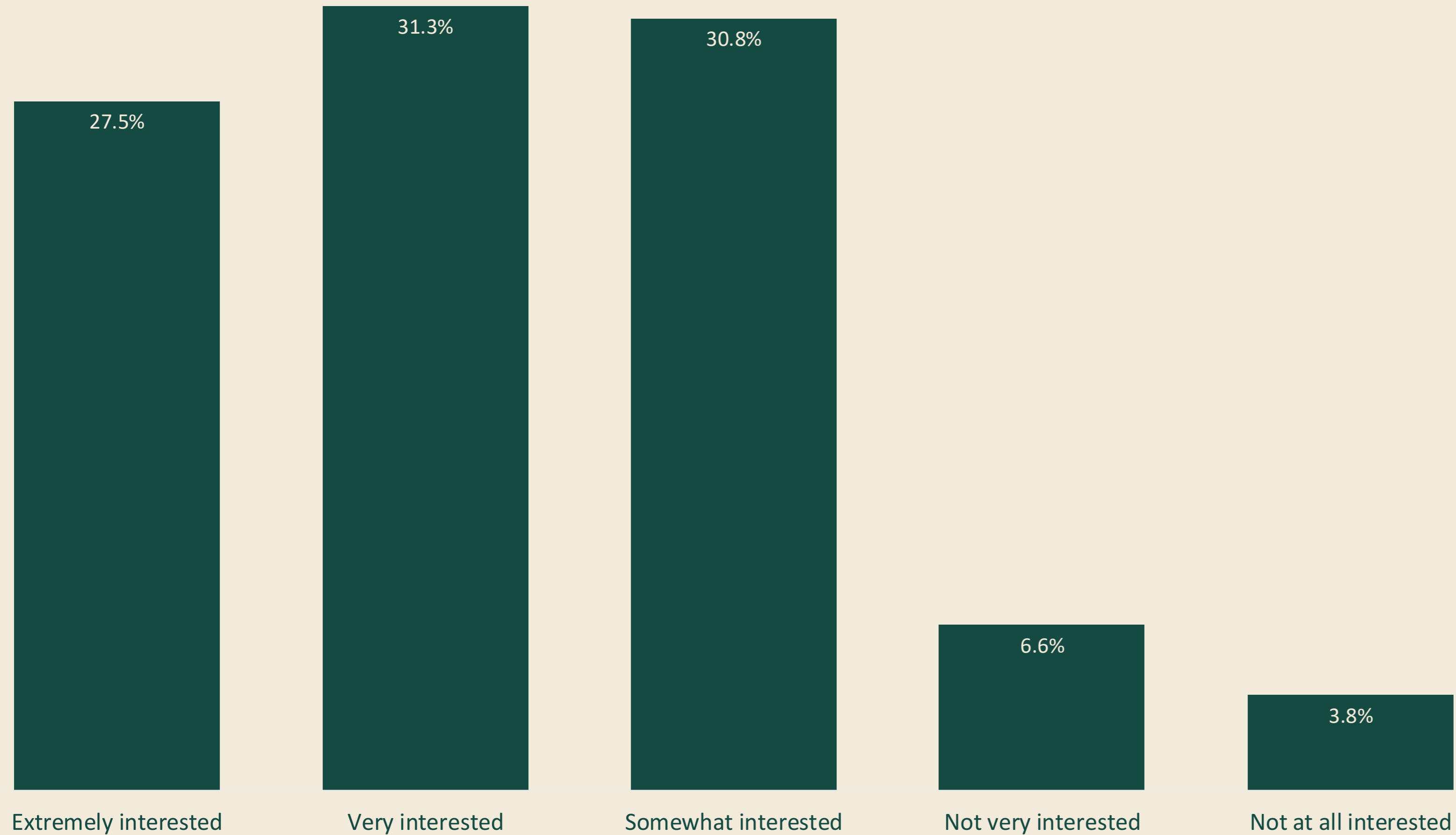
It's difficult to say what may have driven this significant decline in importance of watermelon on kid's menus, though it coincides with Gen X's far lower engagement with watermelon this year. It does not, however, parallel Millennial's increased engagement.



# INNOVATION OPPORTUNITIES

## Interested in Trying Fresh Watermelon in Innovative Foods

Thinking about fresh watermelon at restaurants, how interested are you in trying fresh watermelon featured in an innovative food item that incorporates interesting, unexpected flavors, ingredients, or preparations? (n=1026)



	Gen Z	Millennials	Gen X	Boomers
Very interested	36.8 (+15.3 pts)	37.1% (+5.6 pts)	20.7% (-20.8 pts)	15.2% (-5.8 pts)
Extremely interested	32.2%	30.6%	34.3%	30.0%
<b>Top 2 Box</b>	<b>69.0% (+14.1 pts)</b>	<b>67.7%</b>	<b>55.0% (-16.3 pts)</b>	<b>45.2%</b>

## Interest in fresh watermelon in innovative foods remains high

While interest in fresh watermelon remained high since 2024 (with no statistically significant changes overall), there have been some pronounced shifts among generational cohorts.

Gen Z, in particular, is extremely interested in seeing innovative watermelon items with significant growth here versus last year. By contrast, however, Gen X pulled back in the share indicating “very interested” which parallels other changes noted in this report within this generation.

### Key Takeaway:

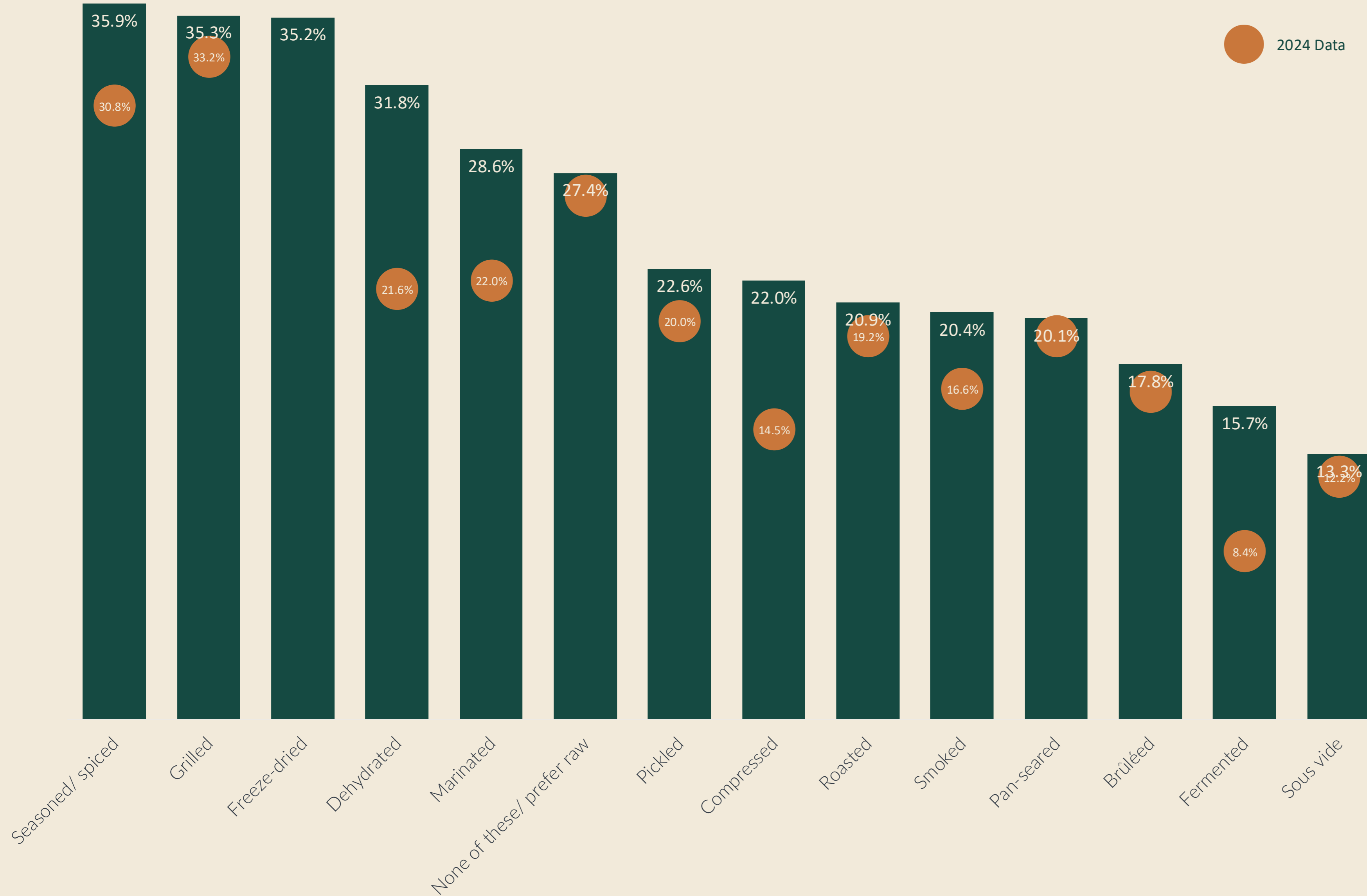
These findings stress the importance of innovation not just overall but specifically in targeting younger consumers.





## Appeal of Fresh Watermelon Preparation

Which of the following types of preparations used with fresh watermelon would you be interested to try in foods menued at a restaurant? Please select all that apply.  
(n=1024)



## Consumers embracing prepared watermelon

While the share of consumers indicating they prefer watermelon raw has changed little, the interest in a wide variety of preparation methods has increased over the last year – potentially driven by greater exposure thanks to innovation by operators.

Seasoned/ spiced shifted to the top preparation this year, but the greatest growth in interest occurred with compressed/ pressed, fermented, dehydrated and marinated. Compressed/ pressed watermelon is of particular interest to chefs as they look for more stable, consistent watermelon products that work well with a variety of other preparations. Fermentation is not only of interest to chefs but to consumers who have embraced this preparation across a wide variety of ingredients and applications.

Freeze drying is becoming one of the hottest preparations within produce and could open up a range of new, innovative applications for watermelon.

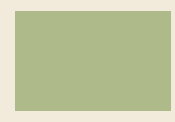
### Key Takeaway:

While raw will always have a place and purpose on menus, operators should experiment with a range of other preparations to create unique and unexpected watermelon experiences.

## Appeal of Fresh Watermelon Preparation

Which of the following types of preparations used with fresh watermelon would you be interested to try in foods menued at a restaurant? Please select all that apply. (n=1024)

	Gen Z	Millennials	Gen X	Boomers	Total
Seasoned/ spiced	41.5%	42.3%	36.1%	25.5%	35.9%
Grilled	37.4%	42.9%	42.0%	22.9%	35.3%
Freeze-dried	25.9%	23.1%	36.1%	53.2%	35.2%
Dehydrated/ dried	46.3%	41.4%	28.4%	12.6%	31.8%
Marinated	42.9%	37.1%	27.8%	11.3%	28.6%
Pickled	29.3%	24.9%	26.6%	13.9%	22.6%
Compressed/ pressed	26.5%	28.6%	26.0%	11.3%	22.0%
Roasted	26.5%	25.2%	27.2%	10.0%	20.9%
Smoked	27.2%	26.0%	20.7%	9.4%	20.4%
Pan-seared	26.5%	27.1%	19.5%	10.0%	20.1%
Brûléed	26.5%	21.7%	15.4%	10.3%	17.8%
Fermented	23.1%	19.4%	13.0%	8.4%	15.7%
Sous vide	19.7%	16.9%	13.6%	5.5%	13.3%
None of these - prefer raw fresh watermelon	15.0%	14.6%	27.8%	48.7%	27.5%

 Indicates statistically significantly greater than total

## Gen Z is significantly more interested in a range of preparations

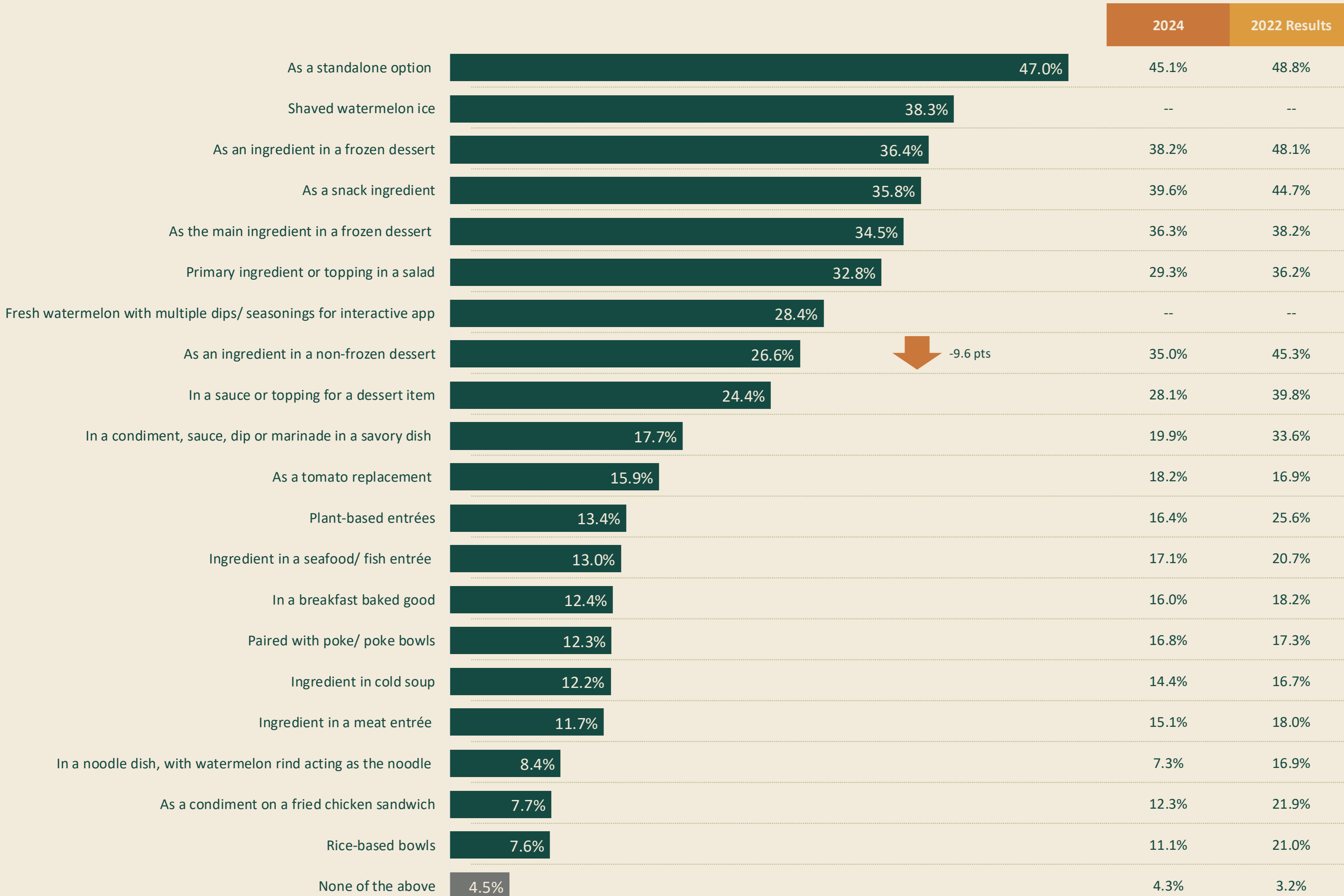
Confirming other findings suggesting Gen Z is looking for more innovation with fresh watermelon, this generation is significantly more interested in a wide range of preparation as compared with the total sample and versus Gen X and Boomers.

One notable exception, interestingly, is freeze-dried which is significantly more interesting to Boomers. It's hard to say why this appealed so much to Boomers but it did and may create some unique menuing opportunities for this generation and others.

**Key Takeaway:**  
While raw watermelon can create unique dishes, preparations can lead to unexpected watermelon experiences.

## Appeal of Fresh Watermelon in Food Applications

In which of the following types of dishes would you like to see fresh watermelon featured in at a restaurant? Please select all that apply. (n=1021)



NOTE: Arrows identify statistically significant changes.

## Desserts and snacks top appealing food innovation

Though watermelon is certainly appealing on its own as a standalone item, consumers are interested in a variety of dessert, appetizer, and snack options as well as ongoing innovation around watermelon in salads.

A slightly tougher sell is watermelon in entrées or paired with animal protein.

### Key Takeaway:


Based on the menuing data, appetizers and sides are the second and third (respectively) most common applications for watermelon so consumers are reacting to what is currently available. And, though desserts are not an innovation focus for watermelons, the right desserts could elevate watermelons particularly with a growing interest in items that will appeal to those consumers looking to cut back but still indulge.

## Appeal of Fresh Watermelon in Food Applications

In which of the following types of dishes would you like to see fresh watermelon featured in at a restaurant?

Please select all that apply. (n=1021)

	Gen Z	Millennials	Gen X	Boomers	Total
As a standalone option	38.8%	44.6%	63.3%	59.4%	51.4%
Shaved watermelon ice	36.1%	44.6%	53.3%	39.0%	42.6%
As an ingredient in a frozen dessert	43.5%	40.9%	43.8%	38.7%	41.0%
As a snack ingredient	38.8%	39.7%	38.5%	42.6%	40.2%
As the main ingredient in a frozen dessert	38.8%	40.6%	47.3%	34.8%	39.2%
Primary ingredient or topping in a salad	31.3%	37.1%	45.0%	37.1%	37.5%
Fresh watermelon featured with multiple dips and seasonings for an interactive appetizer	35.4%	38.3%	36.1%	24.8%	33.0%
As an ingredient in a non-frozen dessert	25.2%	34.0%	40.2%	27.7%	31.4%
In a sauce or topping for a dessert item	34.0%	32.3%	35.5%	20.0%	29.0%
In a condiment, sauce, dip or marinade in a savory dish	29.3%	30.9%	20.1%	10.3%	22.1%
As a tomato replacement	23.1%	23.7%	17.8%	16.8%	20.2%
Plant-based entrées	22.5%	21.1%	19.5%	11.0%	17.9%
Ingredient in a seafood/ fish entrée	17.0%	23.7%	19.5%	10.3%	17.6%
Paired with poke/ poke bowls	20.4%	19.1%	19.5%	11.0%	16.8%
In a breakfast baked good	17.0%	22.3%	20.7%	7.4%	16.7%
Ingredient in cold soup	15.6%	21.1%	16.6%	12.9%	16.7%
Ingredient in a meat entrée	15.6%	22.6%	20.1%	6.8%	16.2%
In a noodle dish, with watermelon rind acting as the noodle	15.6%	19.4%	13.0%	3.6%	12.9%
As a condiment on a fried chicken sandwich	12.9%	17.1%	12.4%	7.1%	12.2%
Rice-based and grain-based bowls	17.0%	16.6%	13.6%	3.2%	11.9%
None of the above	6.1%	2.6%	1.8%	7.7%	4.5%

 Indicates statistically significantly greater than total

## Applications appear less important to younger consumers

Younger consumers skew less heavily toward any specific application, suggesting flavor and preparation may be more impactful to their decision making than the format itself.

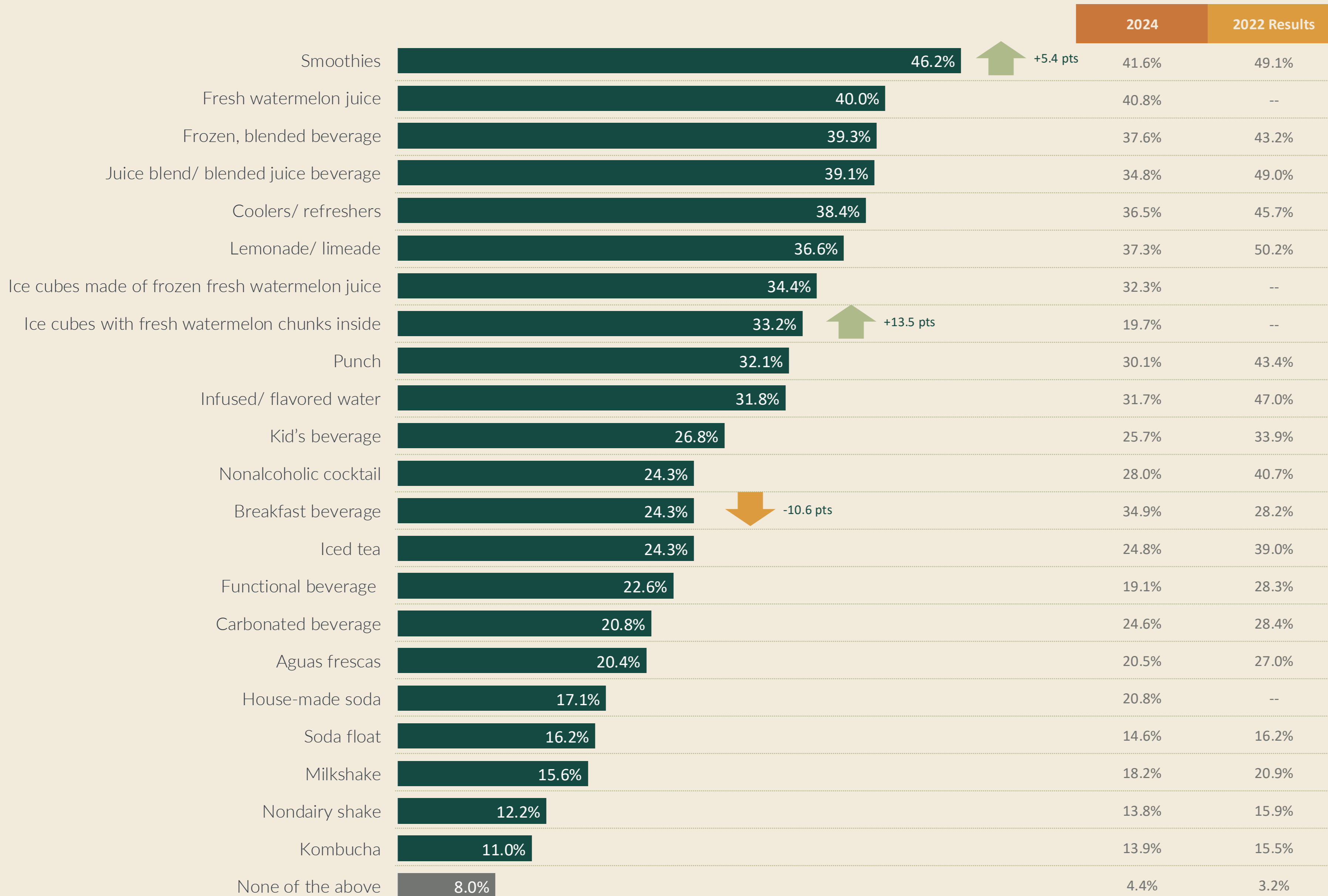
Millennials and Gen X, are drawn to certain watermelon applications with Gen X focusing more on desserts and appetizers/ snacks while Millennials are more interested in seeing watermelon with animal proteins and in entrées.

### Key Takeaway:

For Gen Z, focusing innovation on flavors and preparations may be more impactful but Millennials are open to more unique applications.

## Appeal of Fresh Watermelon in Nonalcoholic Beverage Applications

In which of the following types of nonalcoholic beverages would you like to see fresh watermelon featured in at a restaurant? Please select all that apply. (n=1020)



NOTE: Arrows identify statistically significant changes.

**Smoothies and fresh juice lead innovation opportunities, which are plentiful in the nonalc space**

Generally, as with food applications, the relative interest in nonalcoholic beverage applications remained fairly unchanged though interest declined across each application over the past two years.

Some of the most significant declines included the more familiar applications including lemonade/ limeade, coolers/ refreshers, infused/ flavored water and punch.

**Key Takeaway:**

Despite the innovation occurring in the beverage category, consumer interest for fresh watermelon across these applications declined which may suggest either the innovation is not engaging consumers or it is not featuring enough uniqueness to encourage additional experimentation.

## Appeal of Fresh Watermelon in Nonalcoholic Beverage Applications

In which of the following types of nonalcoholic beverages would you like to see fresh watermelon featured in at a restaurant? Please select all that apply. (n=1020)

	Gen Z	Millennials	Gen X	Boomers	Total
Smoothies	47.6%	50.6%	50.3%	38.4%	46.2%
Fresh watermelon juice	48.3%	44.9%	37.9%	31.0%	39.8%
Frozen, blended beverage	42.2%	38.6%	41.4%	37.1%	39.3%
Juice blend/ blended juice beverage	34.7%	43.1%	44.4%	32.9%	39.1%
Coolers/ refreshers	30.6%	38.6%	48.5%	36.8%	38.5%
Lemonade/ limeade	40.1%	38.6%	40.2%	31.3%	36.7%
Ice cubes made of frozen fresh watermelon juice	33.3%	33.7%	41.4%	30.7%	34.2%
Ice cubes with fresh watermelon chunks inside	27.9%	38.0%	31.4%	30.3%	33.1%
Punch	23.8%	33.7%	37.3%	31.3%	32.1%
Infused/ flavored water	29.3%	35.1%	36.7%	25.8%	31.7%
Kid's beverage	35.4%	30.3%	24.3%	20.0%	26.7%
Iced tea	23.8%	29.7%	25.4%	17.4%	24.4%
Nonalcoholic cocktail	27.9%	26.9%	26.0%	19.0%	24.2%
Breakfast beverage	24.5%	28.6%	23.1%	18.4%	24.1%
Functional beverage	23.1%	29.4%	22.5%	13.9%	22.3%
Carbonated beverage	21.1%	28.9%	18.3%	13.2%	20.8%
Aguas frescas	36.7%	25.4%	18.9%	8.1%	20.3%
House-made soda	22.5%	23.1%	18.3%	6.8%	17.1%
Soda float	26.5%	20.6%	12.4%	7.8%	16.1%
Milkshake	16.3%	19.7%	13.0%	11.3%	15.3%
Nondairy shake	15.6%	16.3%	10.7%	6.5%	12.2%
Kombucha	19.1%	14.3%	7.7%	4.2%	10.8%
None of the above	5.4%	2.6%	8.3%	15.8%	8.0%

 Indicates statistically significantly greater than total

## Nonalcoholic beverages are a gateway to Gen Z engagement

But not every nonalcoholic beverage platform will be engaging to Gen Z. This generation is focused on far less common options like aguas frescas, house-made soda floats and kombucha as well as some of the more common such as smoothies, fresh juice and frozen, blended beverages.

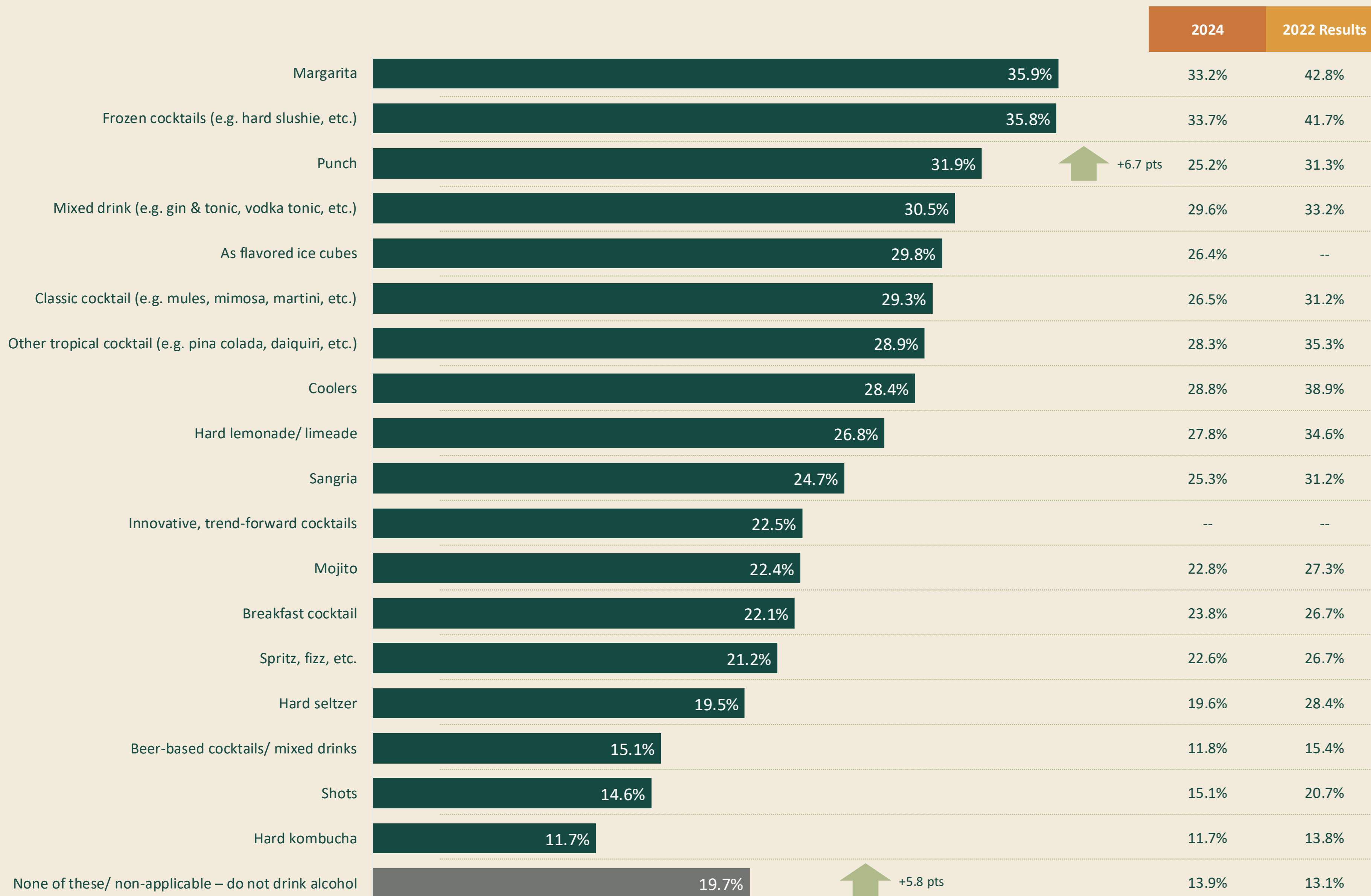
Nonalcoholic beverages are also strongly appealing to Millennials while a few categories certainly skew to Gen X.

### Key Takeaway:

Though it can be challenging ensuring fresh watermelon is a part of the nonalcoholic beverage category which is dominated by RTD options, operators that can and do create unique beverage programs tend to succeed in ways those that don't do not.

# Appeal of Fresh Watermelon in Alcoholic Beverage Applications

In which of the following types of alcoholic beverages would you like to see fresh watermelon featured in at a restaurant? Please select all that apply. (n=1018)



NOTE: Arrows identify statistically significant changes.

## Alcoholic beverage applications face declining engagement

The growth in the share of consumers uninterested in alcoholic beverage options with fresh watermelon is likely a reflection of the struggles within the alcoholic beverage category versus an aversion to watermelon in these types of beverages.

In fact, most individual categories faced stable interest or slight increases.

Overall, margaritas and other frozen cocktails featuring watermelon are most common though some operators have certainly demonstrated innovation across a range of cocktail types.

**Key Takeaway:** Alcoholic beverages offer opportunities to operators offering these items, but the potential to reach the largest possible share of consumers likely lies more with nonalcoholic beverages and food applications.

## Appeal of Fresh Watermelon in Alcoholic Beverage Applications

In which of the following types of alcoholic beverages would you like to see fresh watermelon featured in at a restaurant? Please select all that apply. (n=1018)

	Gen Z	Millennials	Gen X	Boomers	Total
Frozen cocktails	39.5%	40.0%	43.2%	25.8%	36.0%
Margarita	39.5%	40.3%	41.4%	26.1%	36.0%
Punch	25.2%	37.4%	36.1%	26.8%	32.1%
Mixed drink	33.3%	39.7%	35.5%	15.5%	30.6%
As flavored ice cubes	27.9%	33.1%	31.4%	26.1%	29.8%
Classic cocktail	34.0%	37.1%	26.0%	20.3%	29.4%
Other tropical cocktail	29.9%	32.6%	31.4%	24.5%	29.0%
Coolers	25.9%	30.6%	34.9%	23.6%	28.3%
Hard lemonade/ limeade	30.6%	33.7%	30.2%	15.8%	26.9%
Sangria	21.8%	29.1%	24.3%	21.9%	24.7%
Innovative, trend-forward cocktails	23.8%	27.4%	27.8%	13.9%	22.5%
Mojito	25.2%	30.0%	23.7%	12.3%	22.4%
Breakfast cocktail	28.6%	29.7%	20.7%	11.6%	22.1%
Spritz, fizz, etc.	23.8%	27.7%	21.9%	12.3%	21.2%
Hard seltzer	21.1%	27.7%	20.7%	8.7%	19.4%
Beer-based cocktails/ mixed drinks	21.8%	23.1%	10.1%	5.2%	15.1%
Shots	18.4%	21.1%	13.0%	5.2%	14.6%
Hard kombucha	17.0%	18.6%	8.3%	3.2%	11.7%
None of these/ non-applicable – do not drink alcohol	9.5%	9.7%	20.1%	35.2%	19.4%

 Indicates statistically significantly greater than total

## Alcoholic beverages resonate with Millennials

While alcoholic beverages featuring fresh watermelon are generally appealing to both Gen Z and Millennials, these applications resonate more so with Millennials. This is particularly true for punch, mixed drinks, hard lemonade mojitos, spritzes and hard seltzer.

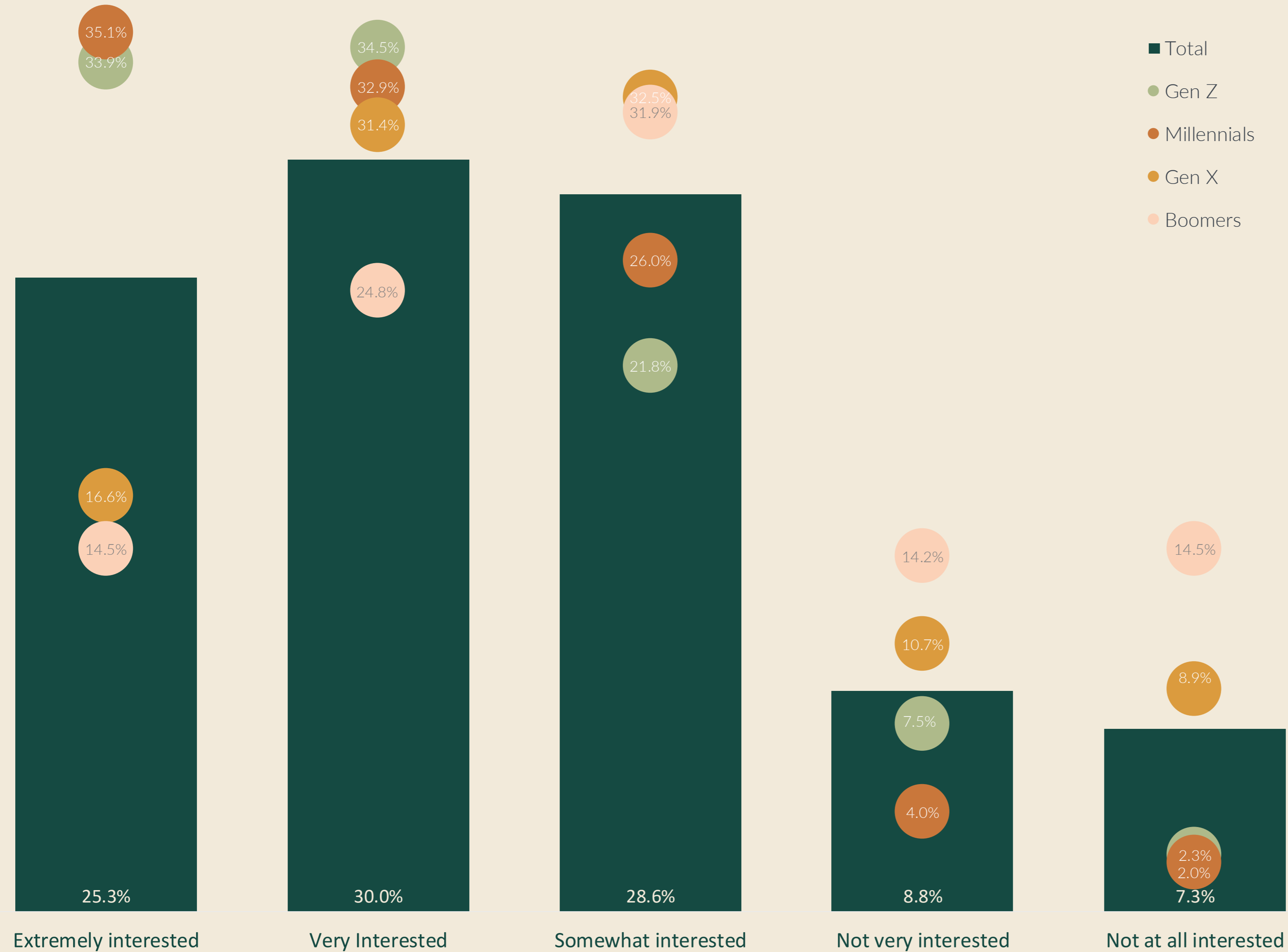
Boomers, on the other hand, are not really the target group for these types of applications.

### Key Takeaway:

Alcoholic applications for fresh watermelon can engage all generations beyond Boomers (and even Boomers, though to a lesser extent and with very particular options) but Millennials are likely to find these applications most appealing.

## Interest in Trying Fresh Watermelon as Beverage Garnish

To what degree would you like to see fresh watermelon featured as a garnish on a nonalcoholic or alcoholic beverage? (n=1018)



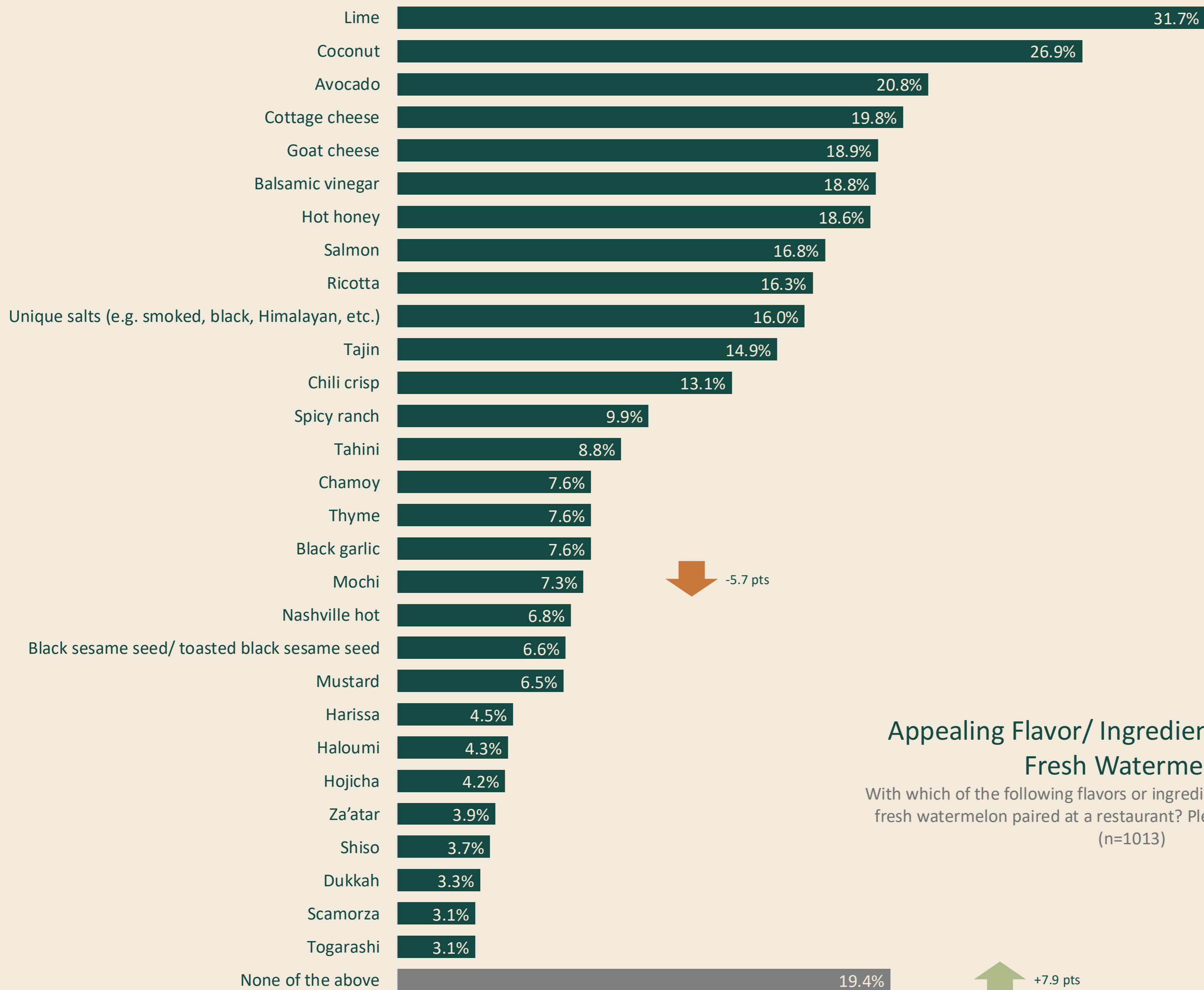
## Overall interest in fresh watermelon as a garnish is high, but varies widely by generation

Fresh garnishes can often act as a fresh halo for any type of beverage, or a visible indicator quality and freshness.

By generation, however, interest in fresh garnishes varies widely. Younger consumers are extremely interested in fresh garnishes, which is a significant change from last year when Gen X led the generations in fresh garnish interest. That's not to say Gen X is disinterested. Rather, their interest is not as strong as that of Gen Z and Millennials.

### Key Takeaway:

Fresh garnishes can elevate even a beverage prepared with primarily RTD ingredients, but if an operator is using fresh watermelon, it would behoove them to leverage fresh garnishes as a key indicator of the quality of the beverage ingredients.



### Appealing Flavor/ Ingredient Pairings with Fresh Watermelon

With which of the following flavors or ingredients would you like to see fresh watermelon paired at a restaurant? Please select all that apply. (n=1013)

NOTE: Arrows identify statistically significant changes.

## Operators have a wide palette with which to innovate

It's important to note here that the appeal of these flavors in this question is absent of any specific application or overall dish composition. As a result, consumers will likely defer to flavors they understand, are familiar with and feel most comfortable with.

#### Key Takeaway:

The ingredients with which fresh watermelon is paired will naturally impact the approachability or perceived uniqueness of any dish as well as the perceived versatility and uniqueness of fresh watermelon itself. Whether the best strategy for fresh watermelon menuing is leaning into familiar ingredients or those that are far more unique, or a combination of the two, will vary widely by operator based on their strategy, market position and target consumers.

## Appealing Flavor/ Ingredient Pairings with Fresh Watermelon

With which of the following flavors or ingredients would you like to see fresh watermelon paired at a restaurant? Please select all that apply. (n=1013)

	Gen Z	Millennials	Gen X	Boomers	Total
Lime	33.3%	32.3%	34.9%	26.8%	31.5%
Coconut	29.3%	29.1%	24.9%	22.6%	26.9%
Avocado	24.5%	25.7%	17.2%	16.5%	20.9%
Cottage cheese	15.7%	19.4%	19.5%	22.6%	19.9%
Goat cheese	11.6%	19.4%	28.4%	17.4%	18.8%
Balsamic vinegar	16.3%	18.6%	25.4%	17.1%	18.6%
Hot honey	25.2%	20.0%	24.9%	11.0%	18.5%
Salmon	17.0%	17.1%	13.0%	16.5%	16.6%
Ricotta	17.0%	18.0%	21.9%	11.0%	16.3%
Unique salts (e.g. smoked, black, Himalayan, etc.)	21.1%	18.9%	18.3%	10.3%	16.1%
Tajin	28.6%	16.6%	13.6%	5.5%	15.0%
Chili crisp	21.8%	16.0%	12.4%	5.8%	13.2%
Spicy ranch	14.3%	13.7%	8.9%	4.2%	9.9%
Tahini	12.2%	9.7%	10.7%	4.8%	8.8%
Black garlic	12.2%	9.1%	10.7%	1.6%	7.6%
Thyme	13.6%	10.0%	8.3%	1.6%	7.6%
Chamoy	19.1%	10.9%	2.4%	0.3%	7.6%
Mochi	9.5%	11.7%	5.9%	2.3%	7.4%
Nashville hot	12.2%	7.4%	7.7%	2.9%	6.8%
Black sesame seed/ toasted black sesame seed	7.5%	7.7%	8.9%	4.2%	6.6%
Mustard	11.6%	10.6%	4.1%	0.7%	6.5%
Harissa	8.2%	7.4%	2.4%	1.3%	4.6%
Haloumi	6.1%	8.0%	1.8%	1.3%	4.4%
Hojicha	10.9%	6.3%	1.2%	0.0%	4.1%
Za'atar	6.8%	6.9%	3.0%	0.0%	3.9%
Shiso	3.4%	6.6%	2.4%	0.7%	3.7%
Dukkah	5.4%	5.7%	1.2%	0.3%	3.3%
Togarashi	7.5%	4.3%	1.8%	0.3%	3.1%
Scamorza	4.8%	6.0%	0.6%	0.3%	3.1%
None of the above	11.6%	12.9%	21.3%	30.0%	19.3%

 Indicates statistically significantly greater than total

## Gen Z is a very flavor-focused generation

Of course, flavor is critical for all generations but when it comes to innovation Gen Z is focused more on unique flavor innovation versus application-focused innovation.

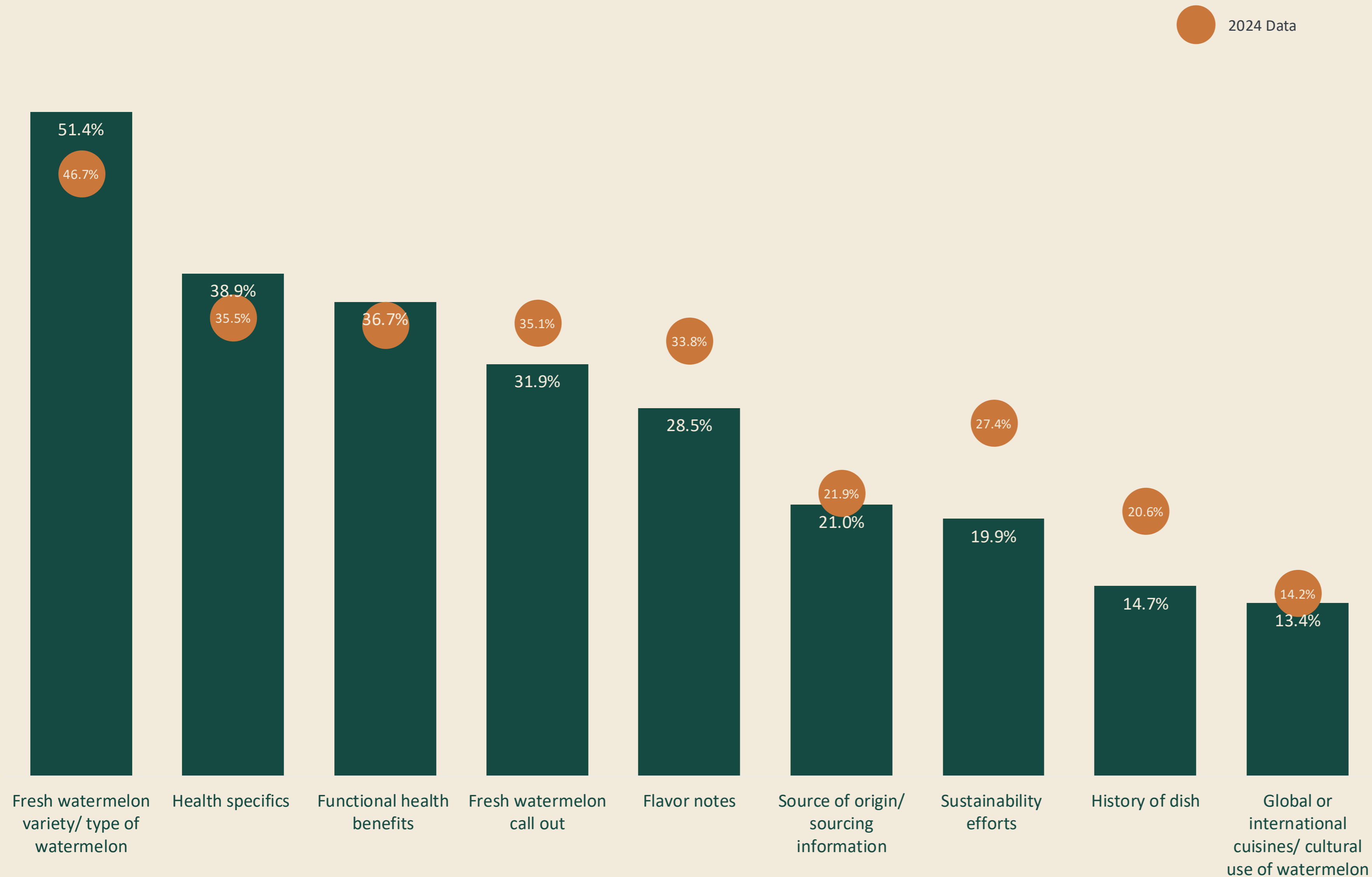
Certainly, hot-button trends are appealing to this generation (hot honey) but it is embracing a range of common and uncommon flavors.

### Key Takeaway:

Flavor innovation should be very unique and specific to each operator's strategy and brand position, but innovation against unique flavor combinations that create unexpected experiences is absolutely critical for Gen Z, whether those combinations are captured in nonalcoholic beverages or food applications.

## Preferred Information/ Descriptors to Increase Fresh Watermelon Application Appeal

What types of information or descriptions for fresh watermelon would make you more likely to order a dish or beverage when dining out? Please select all that apply. (n=1008)



## Consumers continue to look for watermelon varieties

Though this may be a challenging area for the watermelon industry, introducing unique watermelon varieties is something consumers have consistently – and increasingly – look for.

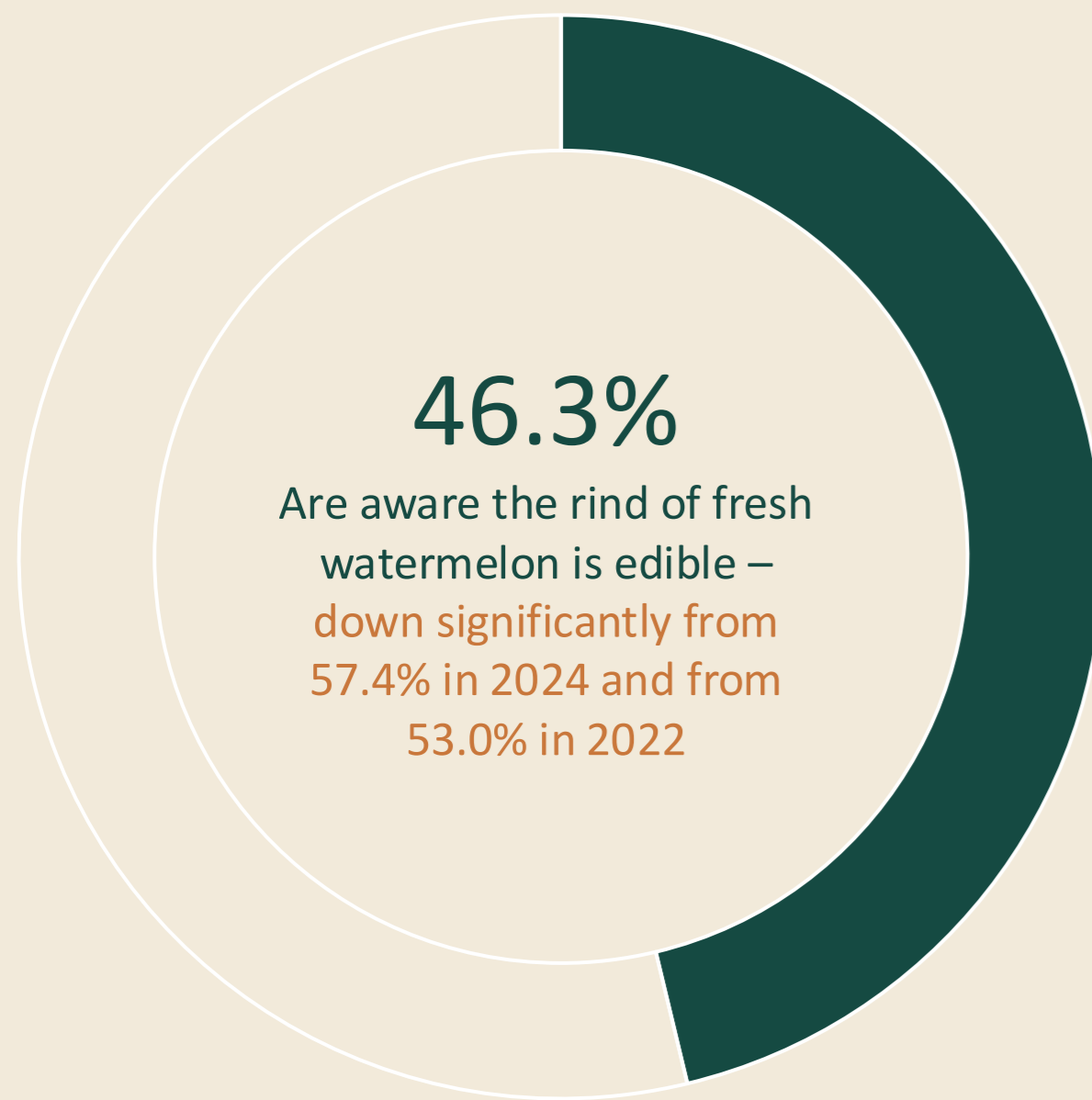
Note that sustainability efforts declined from 2024 to 2025, likely not because consumers are disinterested in these efforts but, rather, inflationary pressures are pushing sustainability issues to the background. Younger consumers continue to place an emphasis on this, far more so than any other generation.

### Key Takeaway:

Whenever possible, NWPB and operators should romance fresh watermelon by providing more information on the product used, sourcing and other information as well as the history of the dishes in which fresh watermelon appears.

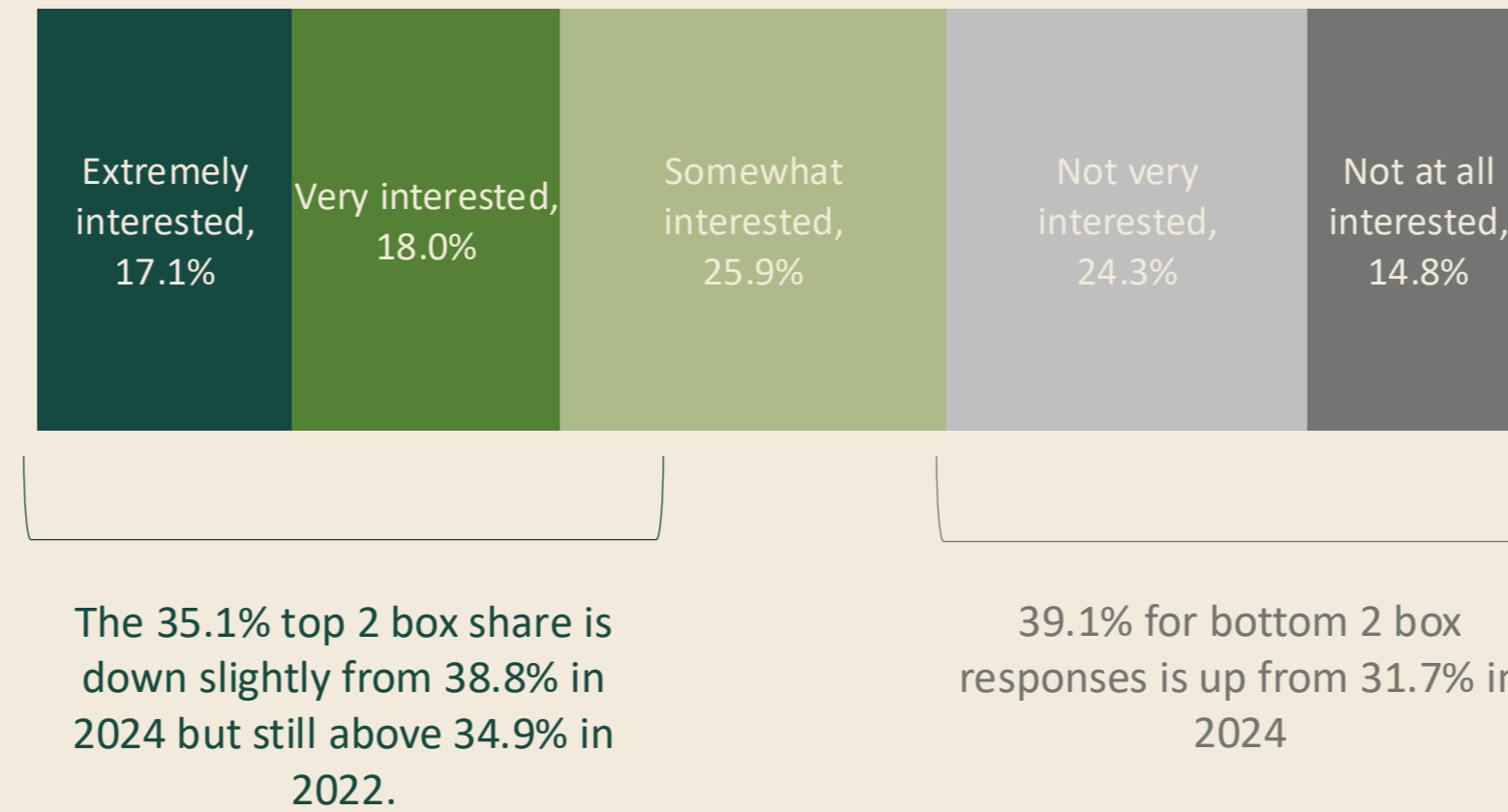
## Edible Rind Awareness

Did you know that the rind of fresh watermelon is edible? (n=1014)



## Edible Rind Awareness

How interested are you in trying restaurant dishes that use the watermelon rind? (n=1014)



# Fresh watermelon rind lost some ground over the past year

Awareness of fresh watermelon rind as edible declined significantly over the past year, dropping over 10 points. While overall awareness declined, over 60% of Gen Z and Millennials are aware the rind is edible, an important generational distinction.

Additionally, while interest in dishes with rind declined overall, over 50% of Gen Z and Millennials are interested in these dishes.

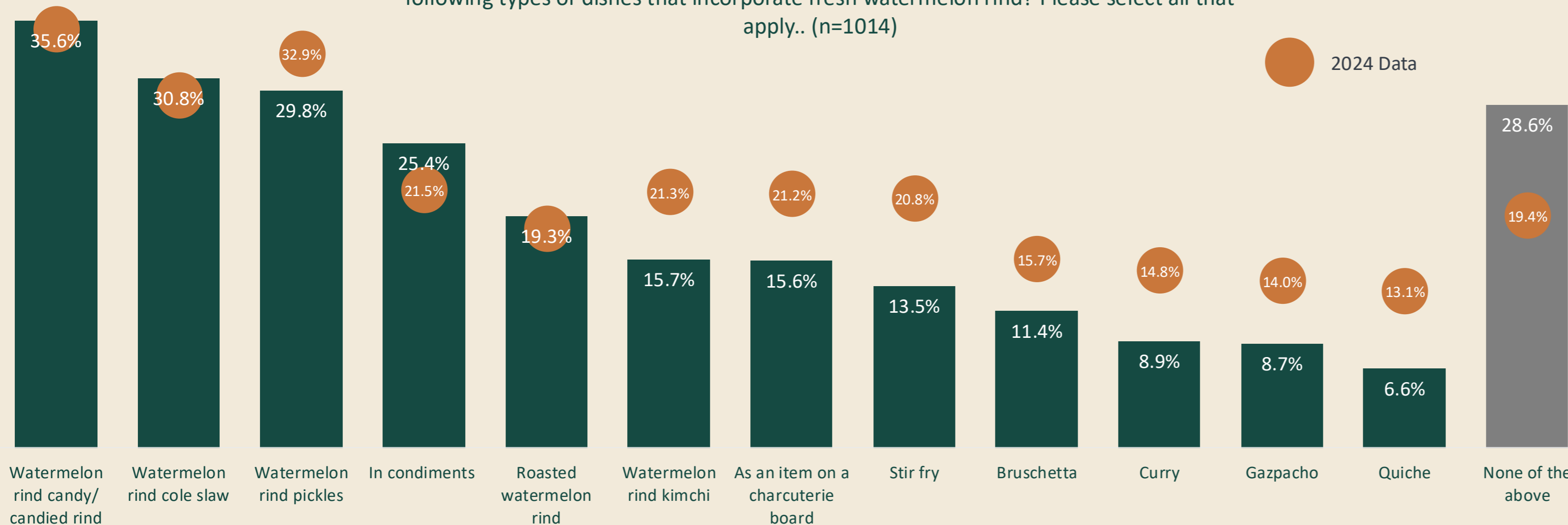
Finally, Gen Z and Millennials are significantly less likely than either Gen X or Boomers to indicate a lack of interest in any type of potential application of watermelon rinds.

### Key Takeaway:

Dishes and other applications featuring watermelon rind should be targeted primarily to younger consumers who are not only more familiar with rind as an edible element of fresh watermelon but also because these consumers are far more interested in these types of options.

## Appealing Watermelon Rind Applications

Assuming the dish was appealing to you, how interested would you be in trying the following types of dishes that incorporate fresh watermelon rind? Please select all that apply.. (n=1014)

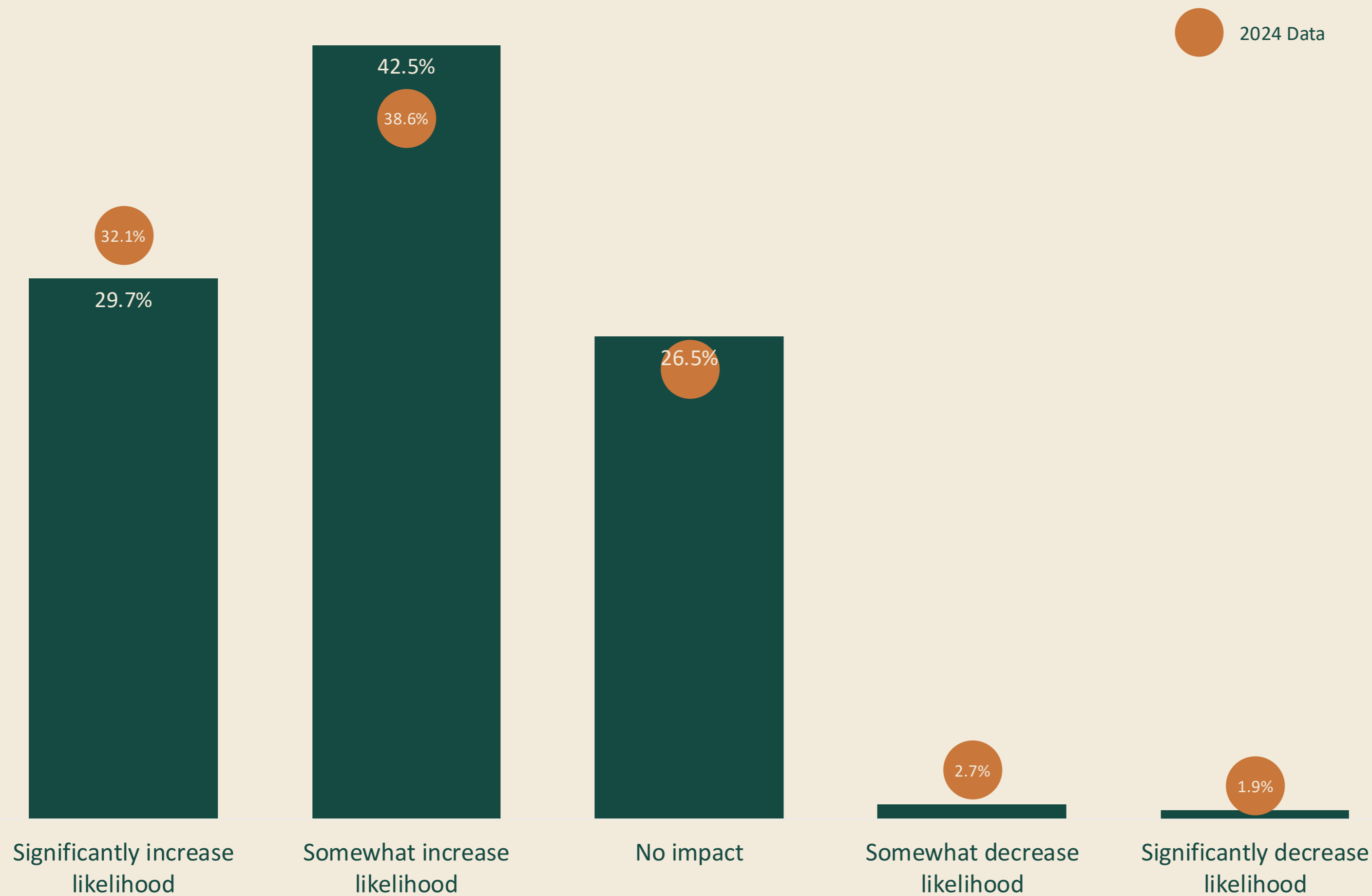




# IMPACT OF AFH BEHAVIOR ON AH

## Impact of Foodservice Availability on Retail Purchase

If you tried a food and/or beverage item that featured fresh watermelon at your favorite restaurant that you loved, how would that impact your likelihood to purchase fresh watermelon for use at home? (n=1004)



Generation	Significantly increase likelihood	Somewhat increase likelihood	No impact	Somewhat decrease likelihood	Significantly decrease likelihood
Gen Z	38.5%	37.4%	20.1%	3.4%	0.6%
Millennials	37.4%	39.4%	22.3%	0.6%	0.3%
Gen X	23.1%	47.3%	29.0%	0.0%	0.6%
Boomers	19.7%	46.1%	33.6%	0.0%	0.7%

## Foodservice activity does impact retail activity

Despite declining traffic and other challenges facing foodservice, innovation and exposure through foodservice still carries weight and impacts consumer behavior at retail.

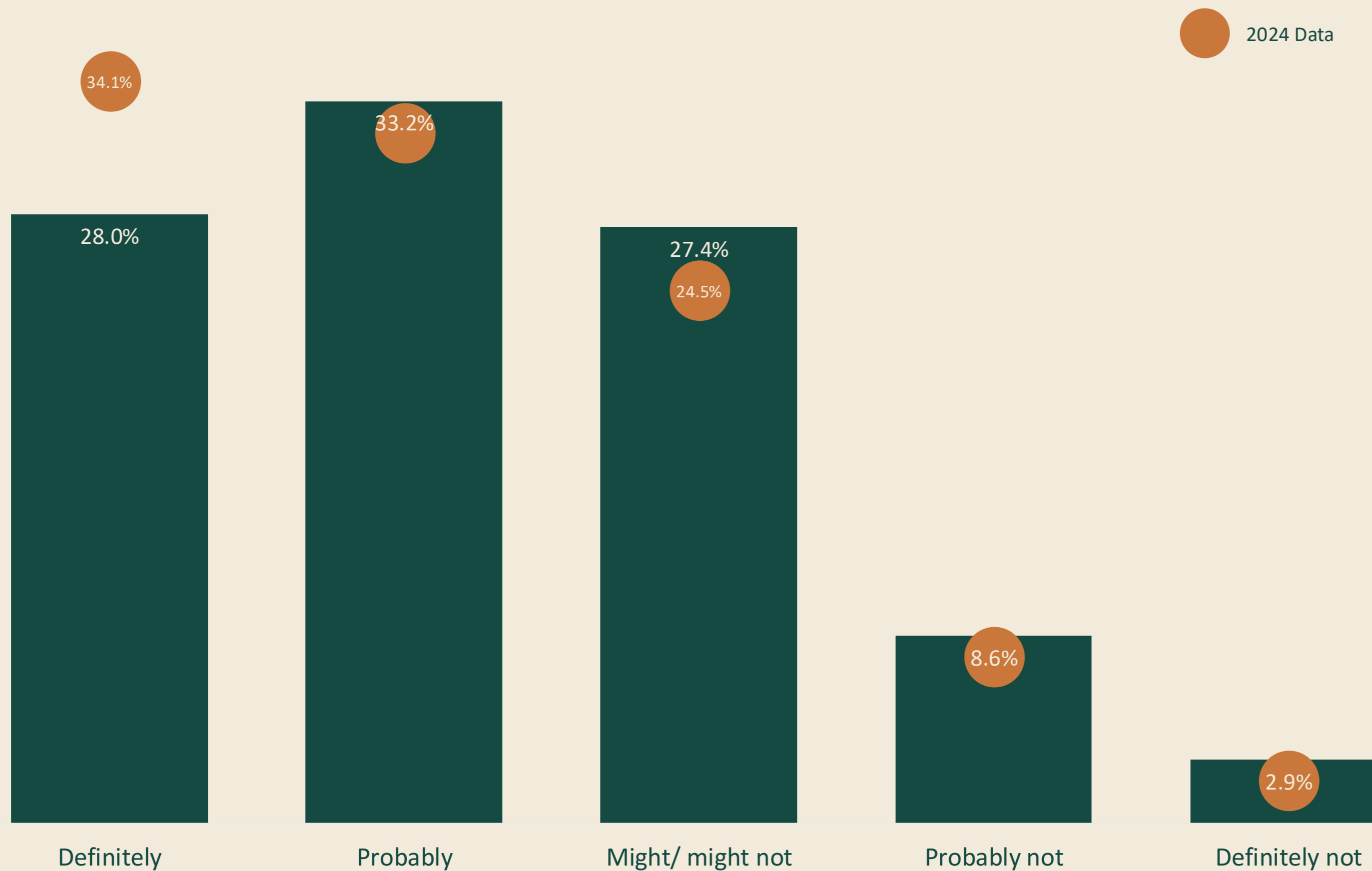
This is true across all generations, and particularly true among younger consumers.

### Key Takeaway:

Continuing to focus on operators as a driver for retail behavior is a smart decision, despite some softness in that industry.

## Impact of Foodservice Innovation on At Home Experimentation

Does seeing fresh watermelon used in innovative, unique dishes at a restaurant inspire you to try fresh watermelon in different ways at home? (n=1004)



Generation	Definitely	Probably	Might/ might not	Probably not	Definitely not
Gen Z	39.1%	30.5%	23.6%	5.7%	1.1%
Millennials	32.9%	38.3%	22.6%	4.6%	1.7%
Gen X	20.7%	33.7%	33.1%	8.9%	3.6%
Boomers	20.3%	28.4%	31.9%	14.5%	4.8%

## Restaurants will inspire at home experimentation

Restaurants influence and inspire consumers at home, with restaurant innovation suggesting potential innovation at home.

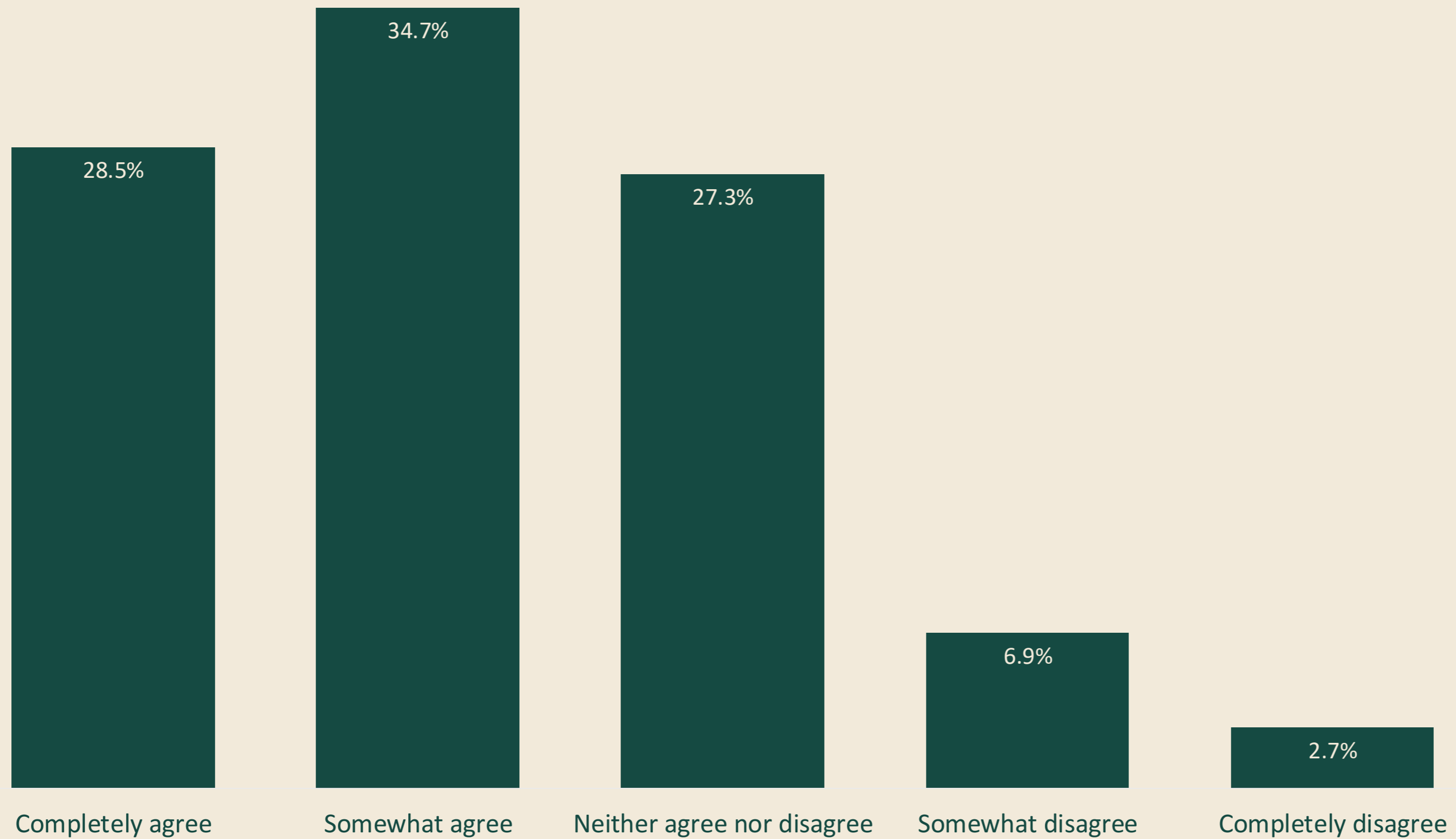
This is particularly true for Gen Z and Millennials, who not only visit restaurants more frequently than other generations but will power both restaurant and retail recovery post recession/ tariff impacts.

### Key Takeaway:

Restaurants are a key driver for consumer experimentation with fresh watermelon at home, so innovation in the foodservice channel is critical.

## Confidence in Chefs to Pick Best Watermelon

To what degree do you agree with this statement: *“I trust a chef to choose the perfect watermelon more than I trust myself, so watermelon dishes at a restaurant will be better than what I can make at home.”* (n=1004)



Generation	Completely agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Completely disagree
Gen Z	24.4%	36.0%	30.2%	8.0%	1.5%
Millennials	32.1%	40.6%	20.9%	5.2%	1.2%
Gen X	47.3%	22.7%	20.6%	6.8%	2.6%
Boomers	24.7%	28.5%	30.7%	13.4%	2.7%

## Consumers Trust Chefs more than Themselves

When it comes to picking out the perfect watermelon, consumers generally trust chefs more than themselves to identify a perfectly ripe watermelon.

Interestingly, Gen X is particularly more trusting of chefs.

### Key Takeaway:

While building consumer confidence in selecting the perfect watermelon at retail is important, restaurants can leverage this perception to their benefit but must ensure that the watermelon they offer is, in fact, perfectly ripe and well managed to ensure quality and satisfaction.

HUMAN-FOCUSED INSIGHTS

# Menu Matters

FOR THE F+B INDUSTRY



MAEVE WEBSTER  
PO Box 750  
Arlington, VT 05250  
O: (802) 430-7085  
C: (312) 420-0724  
[maeve@menumatters.com](mailto:maeve@menumatters.com)

MIKE KOSTYO  
6353 N. Wayne Ave, #3  
Chicago, IL 60660  
C: (219) 308-5872  
[mike@menumatters.com](mailto:mike@menumatters.com)

[menumatters.com](http://menumatters.com)