

# CALIFORNIA PRUNES GLOBAL MEASUREMENT REPORT

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*CY18: August 1, 2018 through  
July 31, 2019*

  
FLEISHMANHILLARD

 **california  
prunes**  
Prunes. For life.

# OVERVIEW & OBJECTIVES

## Overview:

Global Measurement reporting provides a holistic analysis of operational data, media outputs and audience outcomes across key **domestic and international** markets for the California Prune Board.

Reporting began in Q1 CY2018, with a focus of aligning historical operational, handler, consumer media, influencer, event and survey data into a global dashboard, and now encapsulates results from August 1, 2018 through July 31, 2019.

Throughout, metrics have been aligned with Awareness, Engagement, Influence, Advocacy and Action key performance indicators. Action KPI data for consumers and influencers is reflected in outcome (survey) data.

## Objectives:


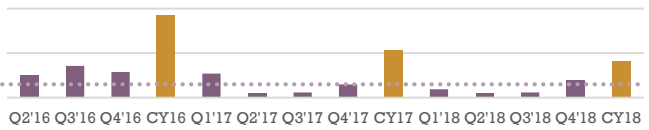



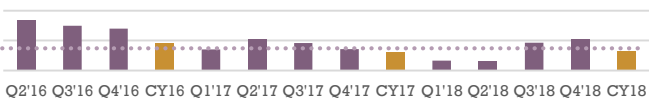

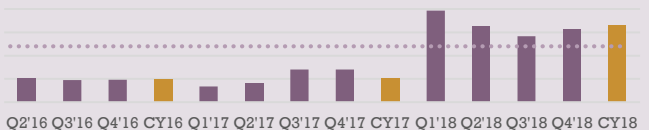

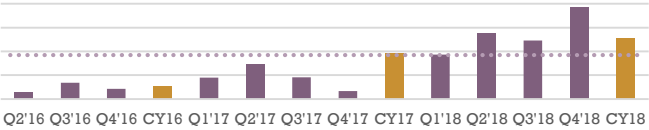
The objectives of this report are to:

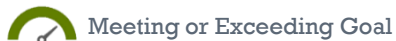
- Highlight the performance of operations, communications and marketing based on synthesized inputs from across markets and regions
- Measure the outputs and outcomes of marketing and communications activities on business goals, including increased consumption of California prunes
- Use data-driven analysis to inform ongoing strategy and activities

# MARKETING ACTIVITIES OUTPUTS

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# CONSUMERS

<p><b>Exposure</b> </p>	<p><b>819 million</b> Media reach CY18</p> <p><i>CY18 goal:</i> <b>205.8 million</b></p>	<p>2,000,000,000 1,000,000,000 -</p> 
<p><b>Engagement</b> </p>	<p><b>11,599</b> Social shares of earned media stories CY18</p> <p><i>CY18 goal:</i> <b>70</b></p>	<p>40,000 20,000 -</p> 
<p><b>Engagement</b> </p>	<p><b>6.4%</b> Avg. owned social engagement rate CY18</p> <p><i>CY18 goal:</i> <b>7.8%</b></p>	<p>20.0% 10.0% 0.0%</p> 
<p><b>Influence</b> </p>	<p><b>82%</b> Avg. key message pull-through CY18</p> <p><i>CY18 goal:</i> <b>63%</b></p>	<p>100.0% 75.0% 50.0% 25.0% 0.0%</p> 
<p><b>Advocacy</b> </p>	<p><b>69%</b> Avg. media mentions that include recommendations to buy CY18</p> <p><i>CY18 goal:</i> <b>49%</b></p>	<p>100.0% 75.0% 50.0% 25.0% 0.0%</p> 



Meeting or Exceeding Goal

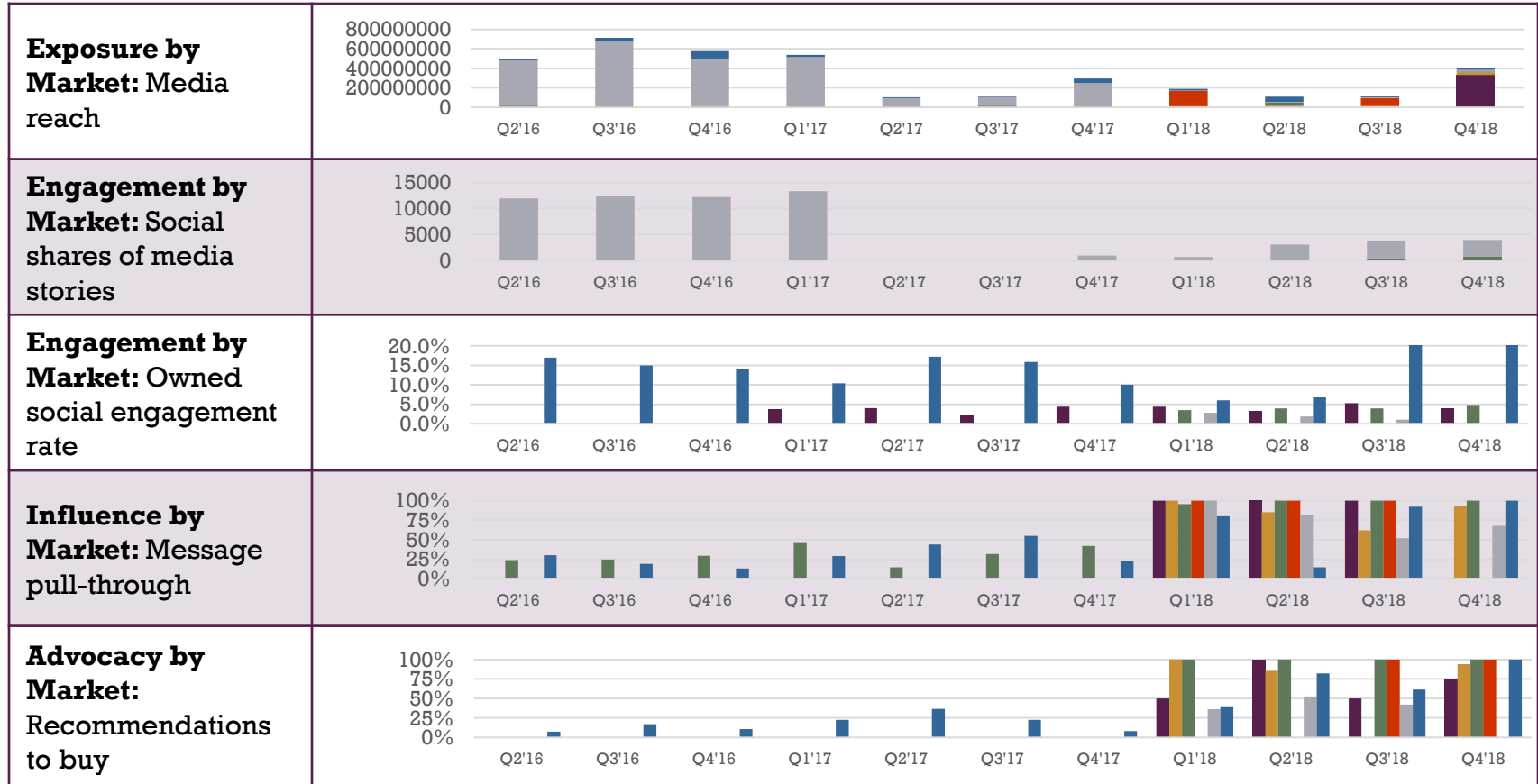


On Track for Annual Goal




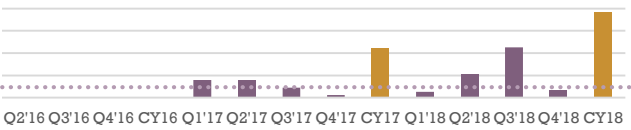

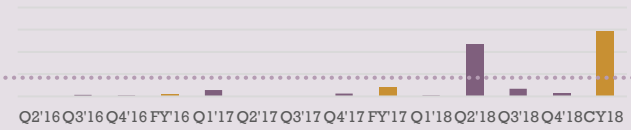



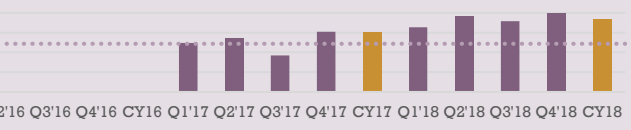

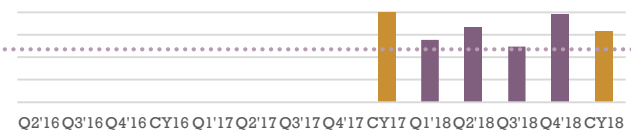
Trailing Goal

# CONSUMERS: MARKET-LEVEL DATA



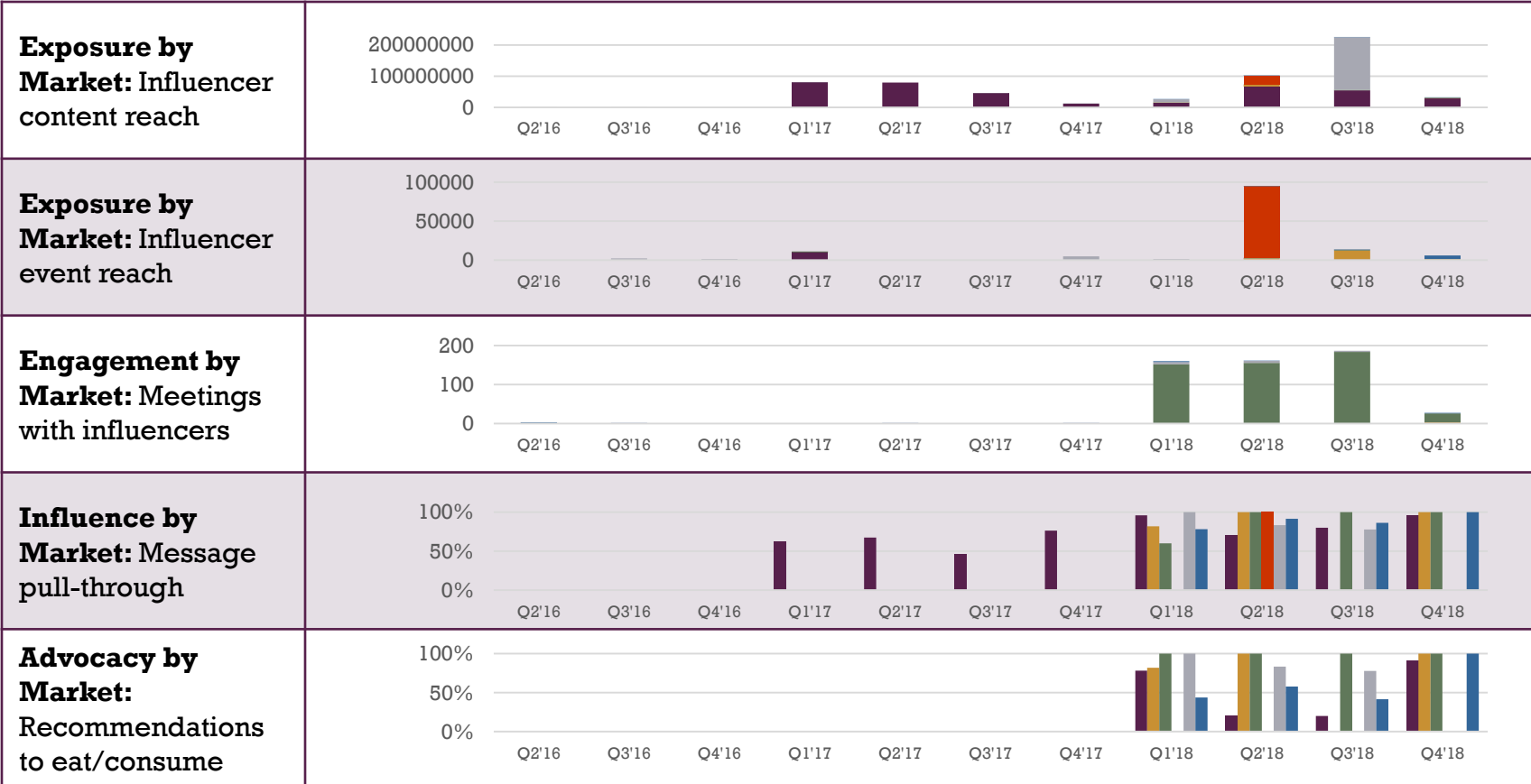
■ USA ■ CANADA ■ EU ■ CHINA ■ JAPAN ■ KOREA

# INFLUENCERS

<p><b>Exposure</b> </p>	<p><b>385.4 million</b> Influencer content reach CY18 <i>CY18 goal: 27.6 million</i></p>	<p>400,000,000 300,000,000 200,000,000 100,000,000 -</p>  <p>Q2'16 Q3'16 Q4'16 CY16 Q1'17 Q2'17 Q3'17 Q4'17 CY17 Q1'18 Q2'18 Q3'18 Q4'18 CY18</p>
<p><b>Exposure</b> </p>	<p><b>116 thousand</b> Influencer event reach CY18 <i>CY18 goal: 20.2 thousand</i></p>	<p>160,000 120,000 80,000 40,000 -</p>  <p>Q2'16 Q3'16 Q4'16 FY16 Q1'17 Q2'17 Q3'17 Q4'17 FY17 Q1'18 Q2'18 Q3'18 Q4'18 CY18</p>
<p><b>Engagement</b> </p>	<p><b>537</b> Meetings with influencers CY18 <i>CY18 goal: 73 meetings</i></p>	<p>600 400 200 -</p>  <p>Q2'16 Q3'16 Q4'16 CY16 Q1'17 Q2'17 Q3'17 Q4'17 CY17 Q1'18 Q2'18 Q3'18 Q4'18 CY18</p>
<p><b>Influence</b> </p>	<p><b>92%</b> Avg. key message pull-through CY18 <i>CY18 goal: 72%</i></p>	<p>100.0% 75.0% 50.0% 25.0% 0.0%</p>  <p>Q2'16 Q3'16 Q4'16 CY16 Q1'17 Q2'17 Q3'17 Q4'17 CY17 Q1'18 Q2'18 Q3'18 Q4'18 CY18</p>
<p><b>Advocacy</b> </p>	<p><b>79%</b> Avg. influencer content that includes recommendations to eat/consume CY18 <i>CY18 goal: 57%</i></p>	<p>100.0% 75.0% 50.0% 25.0% 0.0%</p>  <p>Q2'16 Q3'16 Q4'16 CY16 Q1'17 Q2'17 Q3'17 Q4'17 CY17 Q1'18 Q2'18 Q3'18 Q4'18 CY18</p>



# INFLUENCERS: MARKET-LEVEL DATA



■ USA 
 ■ CANADA 
 ■ EU 
 ■ CHINA 
 ■ JAPAN 
 ■ KOREA

TARGET AUDIENCE  
OUTCOMES

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# 2019 CONSUMER SURVEY RESULTS UPDATE

*Consumers continue to hold positive perceptions of prunes from California, including high/premium quality*

## Canada

- n=1,508 women aged 18-64 who purchase prunes at least once a year
- Majority of Canadians purchase prunes for their digestive health and constipation relief benefits, but are less aware of other benefits and uses
- Half (47%) believe California prunes are of premium quality
- A third of Canadians check where their prunes are from, and of those, three-quarters will look for California prunes

## Italy

- n=1,002 adults living in the Milan area that have ever purchased or eaten prunes (2019 = first time men included in sample)
- Aided awareness of key messages are significantly higher than in 2017
- When considering which prunes to buy, quality & taste are chosen as the most important factors
- 80% believe place of origin is important, and a growing number of respondents identify California as producing the best prunes
- 77% say the California origin is important to their purchase decision

## China

- n=1,200 consumers (25% male, 75% female) with greater representation from second-tier cities compared to previous surveys, to get better representation of the Chinese consumer base
- 88% are aware of California/USA as a source of prunes
- 86% agree that California prunes are a high-quality product, and 84% agree they are a healthy and nutritious food

## Japan

- n=2,070 males and females aged 20 to 69 living in Tokyo, Kanagawa, Saitama and Chiba prefectures; for accurate trending, only data among females aged 20 to 69 is included in this report
- Compared to figures from 2017, intention to eat prunes to maintain health among respondents in their 30s and 60s is increasing, while decreasing among those in their 20s and 40s
- Respondents associate prunes from California as being juicy and larger than prunes produced in other regions

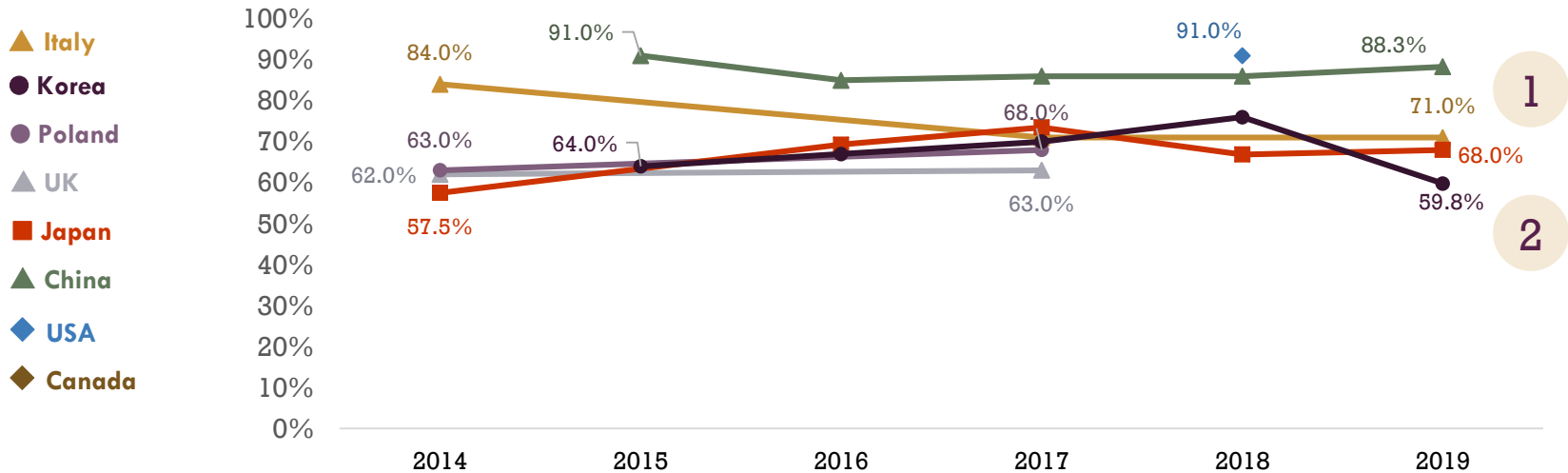
## Korea

- n=500 males and females in 5 major cities who are aware of prunes
- 59% are aware of prunes
- When choosing to buy prunes, quality and taste are the most important factors
- 84% are aware of more than one of prunes' health benefits
- 79% agree that prunes from California are a good value for the money, are better quality and are fresher tasting

# CONSUMER AWARENESS, BY COUNTRY\*

1. Awareness of California as a source of prunes has also remained steady or increased slightly in Japan, Italy and China.
2. This year (2019), Korea conducted their survey using a third-party research company, resulting in data that provides a more thorough and accurate representation of California prune consumption behavior and perceptions. This most recent data should not be considered comparable to historical data points.

## Consumers: Awareness of California Origin



\*Countries in which marketing dollars are spent

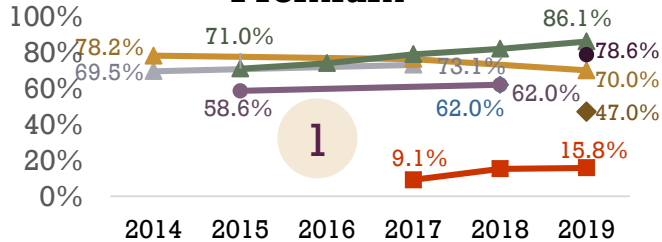
Source: Attitude & Usage Surveys

Survey data collection, question wording and target audiences vary by country.

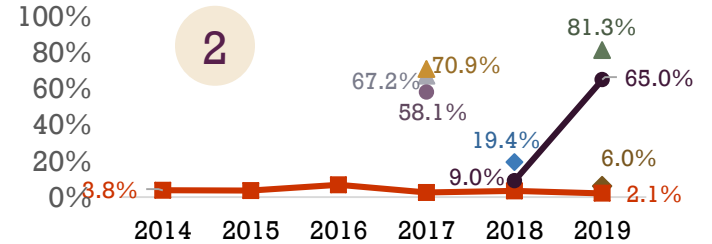
# CONSUMER AWARENESS OF CALIFORNIA PRUNES MESSAGING, BY COUNTRY\*

1. Data from 2019 shows that perceptions of California prunes as a premium product remain strong in Italy and are also strong in Korea. In Canada, the baseline measure stands at 47%.
2. Awareness of benefits to bone health are expected to increase as the message continues to be emphasized in communications.
3. Most consumers consider prunes to be “healthy” and are aware of benefits related to “digestive health.”

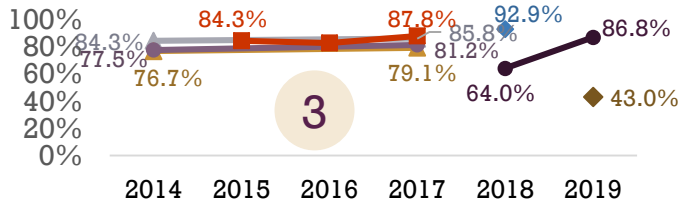
### Consumers: California Premium



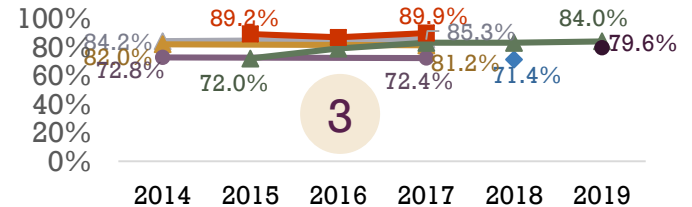
### Consumers: Bone Health



### Consumers: Digestive Health



### Consumers: Healthy



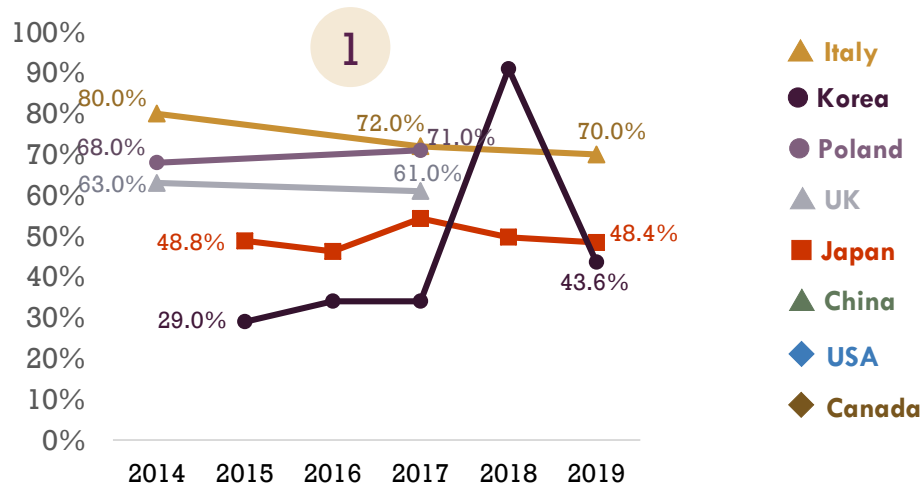
\*Countries in which marketing dollars are spent  
Source: Attitude & Usage Surveys

Survey data collection, question wording and target audiences vary by country. See the Appendix of this report for full country methodologies and comparisons.

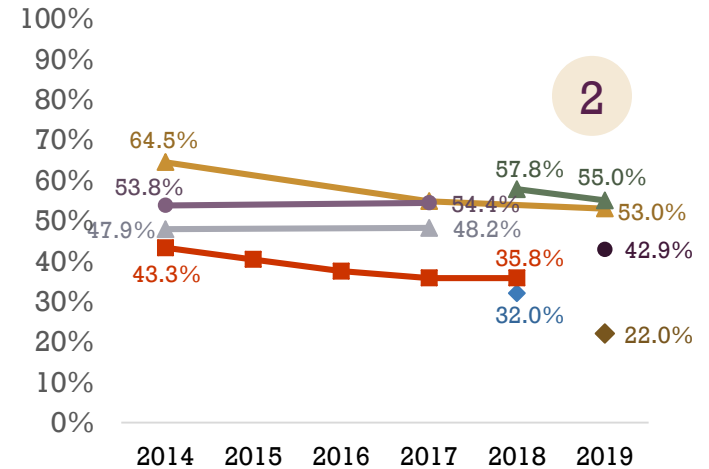
# CONSUMER PURCHASE AND CONSUMPTION, BY COUNTRY\*

1. Data show that purchase intent in Italy and Japan remains relatively steady at around 70% and 50%, respectively.
2. Consumption frequency in Italy is also steady at around 53-54%. In China, frequency has decreased by about 3 percentage points. New data from Canada shows that only about one in five Canadians have eaten prunes in the last month, though this is expected to increase as marketing and communication activities continue to target health-conscious consumers.

## Likely to Purchase



## Eaten Prunes Within Last Month



\*Countries in which marketing dollars are spent  
Source: Attitude & Usage Surveys

Survey data collection, question wording and target audiences vary by country. See the Appendix of this report for full country methodologies and comparisons.

# CONSUMER GOALS BY COUNTRY\*

% (TO DATE†)	Canada		Italy		China		Japan		Korea	
	Actual	CY18 Goal	Actual	CY18 Goal	Actual	CY18 Goal	Actual	CY18 Goal	Actual	CY18 Goal
Awareness	--	--	--	--	<b>88.3</b>	88.0	88.7	90.0	59.0	95.0
CA premium	47.0	--	70.0	--	<b>86.1</b>	77.0	15.8	20.0	<b>78.6</b>	78.0
Bone health	6.0	--	70.9	--	81.3	--	2.1	10.0	<b>65.0</b>	15.0
Digestive health	43.0	--	79.1	--	--	--	<b>87.8</b>	<b>30.0</b>	<b>86.8</b>	70.0
Healthy	--	--	81.2	--	<b>84.0</b>	82.0	89.9	--	<b>79.6</b>	75.0
Likely to purchase	--	--	70.0	--	--	--	<b>48.4</b>	<b>30.0</b>	43.6	93.0
Eaten prunes w/in last month	22.0	--	53.0	--	55.0	--	<b>35.8</b>	<b>12.0</b>	<b>42.9</b>	40.0

Green indicates goal is met or exceeded; yellow indicates "actual" is within 5.0 percentage points of goal; red indicates "actual" is 5.1 percentage points or more from goal

\*Countries in which marketing dollars are spent  
Source: Attitude & Usage Surveys

† "Actual" percentages are most recent data available

# FINDINGS & RECOMMENDATIONS

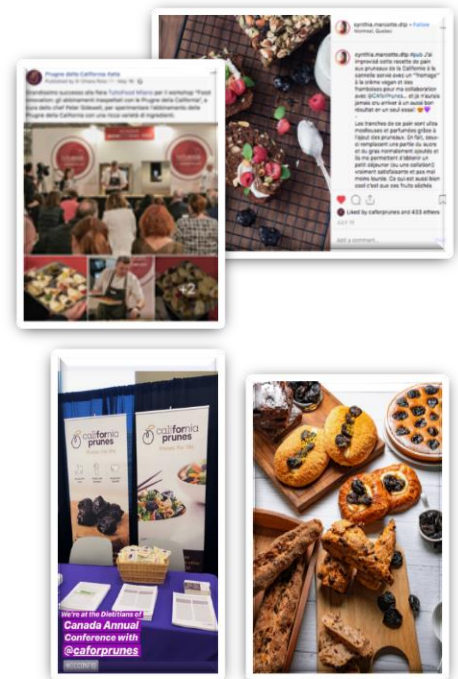
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# FINDINGS & RECOMMENDATIONS

**Performance was consistently high throughout CY18 with almost all goals exceeded by Q2'18, and Q4'18 finishing with an upward trajectory.**

- In general, almost all influencer-related KPIs in CY18 outperformed CY17 due to the presence of initiatives across all quarters in CY18.
- Notably, **influencer content reach in Japan surged from 458K last year to 180.5 million this year**, due to a large ambassador campaign which resulted in placements in publications with high reach. In particular, consistent features of Ambassador Aya, a yoga instructor, helped Japan achieve a significantly higher impression count. This increase in content likely contributed to a 1-point uptick in awareness of California origin in the market (from 67% to 68%).
- A handful of consumer-related KPIs in CY18 increased from the previous year. Notably, however, **average message pull-through more than tripled**, from 25.2% in CY17 to 82.3% this year as key messages were more focused and consistent due to updates to tracking.

***The use of key messages surrounding the health and nutritional benefits of California prunes helped ensure influence and advocacy goals were achieved in CY18, and affected consumer outcomes.***

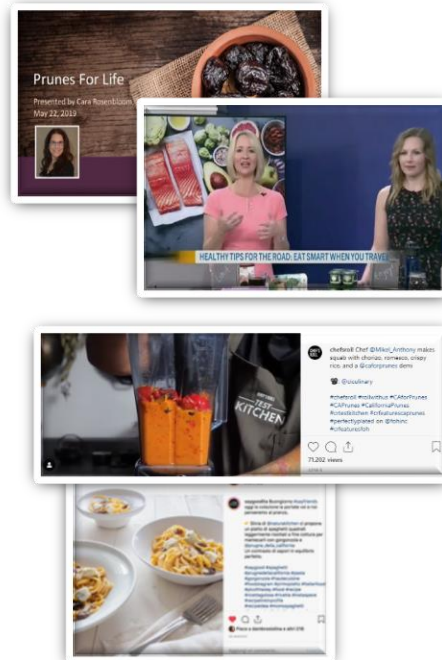


# FINDINGS & RECOMMENDATIONS

## All consumer-related metrics increased over Q3 totals, indicating successful engagement tactics and key message implementation across all markets in Q4.

- In Q4, consumer media reach **more than doubled** compared to Q3, from 118 million to 403 million impressions. Reach from this quarter was mainly driven by USA's collaboration with Chef's Roll, a culinary community of chefs, which resulted in video content showcasing the versatility of prunes in recipes across cuisines on social media platforms like YouTube and Instagram. Broadcast segments across Canada also contributed to the overall increase in reach.
- Message pull-through in consumer content surpassed 90% in four of the six regions, with the **EU, China and Korea each achieving 100%**. In addition, recommendations to buy increased 34.2 percentage points, from 61.5% in Q3 to 95.7% in Q4. This correlated to strong association with bone health benefits in Korea and California as a source of premium prunes in China.
- **Japan continues to dominate social shares of media stories**, garnering over 3,000 shares for the past two quarters. Notably, Q4'18 (3,217) saw an impressive 332% increase in social shares when compared to the same time last year (967).

***CY19 should continue to capitalize on a variety of media reach methods such as in-person workshops, online cooking videos, and conferences to engage and educate consumers.***





# FINDINGS & RECOMMENDATIONS

**While all consumer and influencer KPIs have exceeded CY18 goals, social engagement on owned content is an area to focus on in CY19.**

- **CY18's average owned social engagement rate finished at 6.4%, trailing slightly behind the year-end goal of 7.8%.** Korea's engagement rate has achieved the highest engagement rate, 36% and 34%, respectively, in the last two quarters.
- For CY19, developing effective strategies to boost engagement across consumer and influencer content is essential. More specifically, targeting the USA, EU, and Japan, would be beneficial as these regions have averaged 4.3%, 4.1%, and 1.9% respectively throughout CY18.

**Consumer data confirms outreach should focus on increasing purchase and consumption frequency.**

- The number of consumers who have eaten prunes in the past 30 days remains flat across markets, with Italy remaining steady at around 53-54%, and China decreasing by 3 percentage points compared to 2018.
- Purchase intent also remains flat across markets; in Italy and Japan, purchase intent remains relatively steady around 70% and 50%, respectively.

# APPENDIX: METHODOLOGY

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# METHODOLOGY

Market data and survey data were collected for Q4 and historically for the U.S., Canada, EU, China, Japan and Korea. Crop data was provided by the California Dried Plum Board. Metrics are defined, as follows:

Metric	Definition
Volume of traditional + digital media articles	The number of print media articles, plus the number of online news articles, plus the number of pieces of broadcast content secured; include syndicated articles
Reach of traditional + digital media articles	Reach is defined by media type: Print media articles include circulation or readership, online news articles include monthly unique visitors (UVM), broadcast segments include viewers or listeners
Total social shares of earned media stories	Number of times that media articles were shared on social media
Social engagement rate (percentage)	The number of engagements on a social post, calculated as (likes + shares + comments) divided by followers
Key message pull-through (percentage)	Number of media articles that include at least one key message, divided by the total media articles secured
Media mentions that include recommendations to buy/eat (percentage)	Number of media articles that include a recommendation to buy/eat California prunes, divided by the total number of media articles secured
Influencer event reach	Number of people who attended an event where an influencer(s) hosted or made an appearance
Meetings with influencers	Number of meetings held with current potential influencers or KOL or Ambassador.