California Avocado Commission Marketing Research and Data Utilization

The California Avocado Commission and its agencies utilize a wide variety of research, data and tracking tools to monitor marketing performance and to aid in decision making. As referenced on Page 4 of the Message from the President, the following pages highlight many of these tools. The chart is organized by those tools used to validate marketing efforts, research and data that informs marketing decisions on a regular basis as well as studies and tools used infrequently or only as needed for special projects.

Methods/Data/Reports	Validating Marketing Efforts
UC Davis – CAC Program Review	UC Davis – Ag Economic/Program Effectiveness Review (every 5 years)
California Avocado Tracking Study	Large sample quantitative research of consumer awareness, attitudes and perceptions about avocados; compares California avocados to avocados of other origins and has data for California, regions and the total U.S. Usually conducted annually because it provides data for business plan KPIs
IRI Retail Scan Data	Retail scanner-based sales data for avocados used on a regular basis and for ad hoc reporting by key retailer; used to showcase performance highlights and identify opportunities
Tiered Account Report	Using retail scanner-based sales data, AMRIC FOB data and observations from CAC Retail Marketing Directors and handlers, this report identifies those accounts most likely to deliver better returns for California avocado growers. These are the key targets for distribution and for California avocado marketing support. Analysis performed annually
Advertising Creative Analysis (Instapanel)	The objective for this research is to gather a blend of quantitative and qualitative feedback from avocado consumers to better understand the resonance of creative video concepts as well as impact on perception and shifts in intended behavior. In 2021 testing included the :06, :15 and :30 second video spots; the learnings from this research will help optimize development of creative and inspire new creative for the next campaign iteration

Advertising Media Evaluation (Used for both planning and validating marketing efforts)	• Nielsen MRI – audience insights, demographics, media usage, psychographics
	• Mediahub Scout – consumer attitudes, media usage, technology habits
	• SRDS – general media information
	• eMarketer – digital marketing insights & trends
	• Comscore – digital planning tool
	• Google Trends – general industry trends
	• Media campaign insertion order & billing:
	   o Mediaocean Prisma
	   o Mediaocean MBOX
	• Media verification and ad serving:
	   o Google Double Click Manager (DCM) – digital ad server and performance tracker
	   o MailChimp: This is the service we use to send out our CAC monthly newsletter emails, it also has tools that we use to analyze data like email open rates.
	   o Integral Ad Science – brand safety tools that track geo, fraud, viewability, etc.
	• Media competitive:
	   o Kantar Strategy – competitive media spend and information
	   o Pathmatics – digital media competitive

Methods/Data/Reports	Validating Marketing Efforts
Social Media/Website Evaluation	• Native Social Platform Data: We leverage data directly from social platforms (Instagram, Pinterest, Twitter, Facebook, YouTube) to measure the impact of content. This includes impressions, reach, engagement rates and link clicks. Used to adjust our content strategy to ensure we are creating effective and compelling work that brings audiences in and drives brand affinity • SproutSocial: This is our social content management tool which we use to effectively reply and engage with our community, schedule and publish content, and do social listening to understand what the audience is interested in and how consumers are engaging with our social content • SproutSocial also allows CAC to monitor key conversations that audiences are discussing, which helps us build ownable work to address consumer questions (ex. avocado hand conversation turned into CAC creating content around how to properly cut an avocado) • Quintly: This tool is used to pull competitive data from social channels, which allows us to see where our competitors are growing and peak moments of conversation. This gives us a better understanding of what our competitors' communication tactics and areas of focus are, which allows us to plan for burst moments to engage consumers and drive affinity and attention toward California avocados • Brandwatch (formerly Crimson Hexagon): This tool allows us to monitor social conversations across multiple platforms based on specific key words. We use this tool to gauge sentiment of specific topics (ex. when COVID hit, we used this tool to understand how consumers were feeling about produce/grocery shopping now and used these findings to inform language for CAC's response on the website to ensure consumers understood our safety precautions and standards.) • Bit.ly – link shortener with tracking • Brightedge – organic keyword tracking tool • Crimson Hexagon/Brandwatch – social media measurement and competitive analysis tool • Data Studio – Google tool used to visualize the data points from Google Analytics and Google Search Console • Facebook/Twitter/Pinterest Ad Managers – building, launching, measuring and optimizing performance of ads across social media platforms • Google AdWords – building, launching, measuring and optimizing performance of Google ads • Google Analytics – analytical tool to measure website performance • Google Page Speed Checker – page speed optimization tool • Google Search Console – content optimizer for websites • Google Trends – track keyword search volumes • Keyword Planner – use for research purposes • Search Ads 360 – monitor data and performance of Google ads and Bing ads • SEMRush – organic keyword tracking tool • The SEO Framework – plugin for CAC's website that measures and helps optimize content for Search Engine Optimization • Userlytics – we will use this soon to perform some user testing to get insights on site user experience • Media partners provide detailed campaign results via their unique custom tools

Methods/Data/Reports	Validating Marketing Efforts
Consumer Public Relations Tracking and Evaluation	• Cision – Platform used to track brand mentions and monitor media coverage in real-time across local, regional and national media outlets in both print and online format • Release Distributions (BusinessWire & NAPS) – In addition to our targeted media outreach, we utilize distribution services like BusinessWire and NAPS for a wider reach for our press release and mat release executions to reach a greater target of consumers and media; both services provide analytics and impressions following the distribution of each release
Trade Advertising Report	Summary results for advertising campaign by publication by impressions and Click Through Rates
LinkedIn Report	Quarterly results for LinkedIn by impressions, sharing, followers and engagement rate

Retail and Foodservice Trade Public Relations and Experiential Tracking and Evaluation	• Print and online results tracked by third-party monitoring services and manually for publications that are not covered by those services
	    o Similarweb is utilized for website viewers and visitors
	    o Cision is utilized for circulation
	• TV results: Viewership provided by advocate and/or customer
	• Social media activations: Follower or subscriber numbers provided by the digital platform owner
	• In-person and virtual event results: Attendees present/participating

(Retail) California Avocado Promotion Review	Exploratory analysis of promotional sales and ad activity for Tiered Account retailers that measure additional monetary benefits to carrying California avocado and California avocado callouts in feature ads; specific program results also reviewed based on customer-supplied information
(Retail) Avocado Promotion Reports	These reports complement the AvoScore cards with additional insight into the promotional sales trends of our retailer partners and Tier 1 accounts, including sales lift, feature ad sales, discounted sales, and non-promoted sales trends
Research/Reports	**On-going, Supporting Marketing Decision-Making**
(Retail) State of the Industry	An analysis of retail scanner-based sales data for the avocado category; comparisons are made for the California season and California region since sales data are not available by avocado origin; this analysis looks at sales, pricing and other retail measures over time
(Retail) Shopper Panel Studies (Examples below)	Studies that analyze avocado shopper segmentation, purchase behaviors and demographics to support the categorization and definition of the California avocado target shopper/consumer
• Avocado Purchase Volume by Shopper Demographic Group	Study that analyzed shopper demographics for the California region vs. outside California to help understand the California avocado shopper
• California Avocado Shopper Purchase Trends	Study that utilized IRI/Nielsen panel data to analyze how shopper behavior differs between the California region and rest of country. Also analyzed shopper behavior variances between the California season and non-season
(Retail) Market Basket Studies	Evaluates what is purchased along with avocados/California avocados; used to encourage retail support and promotion
(Retail) Avocado Business Reviews	A customized analysis of category performance for our retailer partners using scanner-based sales data. Reviews retail pricing, promotions, and other sales performance measures to support our retail partners and grow sales of California avocados

Research/Reports	On-going, Supporting Marketing Decision-Making
(Retail) Data Tracking Reports (Examples Below)	These reports provide an analysis of retailer performance that keeps the Commission abreast of avocado sales trends in the retail marketplace (by retailer, by market) using scanner-based sales data. These reports help measure sales performance and promotional metrics on an on-going basis
• Monthly Retailer Reports	Uses scanner-based retail sales to keep up to date with the retail sales performance of our each of our tracked Tier 1 accounts and ancillary retailer partners
• AvoScore Cards	Tracking reports that utilize scanner-based retail sales to engage with and support our retail partners during the California season. These reports utilize sales trend data, opportunity analysis, PLU trends and additional metrics
(Retail) Qualitative and Quantitative shopper research (Examples Below)	Research studies that follow the shopper (consumer) path-to-purchase for California avocados. These studies measure how shoppers interact with and purchase avocados from a shopping experience perspective
• Proactive Super Shoppers Study	Online survey conducted using the National Consumer Panel to set a quantitative baseline that measures the extent that super avocado shoppers proactively make in-season California avocado purchases
• Avocado Ripeness Study	Moderated online-discussion and questionnaire that focused on the key behaviors, motivations, purchase drivers and barriers behind shopper preference for avocado ripeness and other factors, including preference for California avocados
(Foodservice) DATASSENTIAL	• SNAP! - information about avocado penetration, growth, affinity, menu applications, key segments, trends, and related insights to inform program strategy development and communications as well as non-beverage menu applications for menu items containing the word "California" • Operator Omnibus - Eight custom questions asked in Datassential's OMNIBUS monthly study of 400 operators. Insights from the study provide data around awareness of California avocados, purchasing preferences, frequency, and verify the value of adding California avocados to the menu • SCORES – Measures six key metrics among active consumer base to identify for chains the value our menu concept are to their operation. SCORES will identify if the concept works or requires work and includes how likely consumers would purchase the menu item at the price listed (i.e., purchase intent) and the uniqueness of the dish to the price point
Consumer Public Relations Planning	• MuckRack – This all-in-one platform helps build media relationships and collaborate with journalists to help identify key media targets while also allowing us to see what media are covering to perfectly tailor media pitches towards each contact • CreatorIQ – This platform is used to source potential Brand Advocate partners who have followings across various platforms such as Instagram, Facebook and Pinterest, look into their audience demographics and other back-end insights of their profiles • TikTok Creator Marketplace – Similar to CreatorIQ, we use this platform to source partners who are specifically on TikTok, looking into their audience demographics and back-end insights of their content and profiles

Research/Reports	Occasional/Ad Hoc Supporting Marketing Decision-making
California Avocado Holiday Reports	Utilized scanner-based sales data to measure the sales trends for avocados during key avocado holidays to support decision-making and encourage the promotion of California avocados
California Avocado Opportunity Leakage Reports	Utilized the National Consumer panel to identify opportunities for our Tier 1 accounts to capture additional avocado purchases from their customers by stemming the "leakage" of their shoppers' avocado purchases to other outlets, thus potentially increasing demand at our Tier 1 accounts.
(Foodservice) MENU MATTERS	Survey in 2018 to identify patron's baseline perception of the California brand and avocados; and again in 2020 to identify if COVID-19 may have affected perception of "local", "California grown" and "U.S. Grown"
Other research and data	• Nielsen – quantitative research measuring consumer opinions about California avocado advertising among those confirmed to have actually viewed the ads in the real world • Gigwalk or other third-party service that reports on real world merchandising conditions • Retailer satisfaction qualitative survey • Consumer satisfaction quantitative survey • Trade media qualitative survey • Focus groups and other qualitative research • Other diagnostic studies used very infrequently for specific needs