

**Running Head: EXPLORING THE REPUTATION OF THE ONTARIO WINE
INDUSTRY**

Exploring the Reputation of the Ontario Wine Industry:
What is making wine consumers in Toronto buy or ignore wines from Ontario?

MCM740 - CAPSTONE

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I finally want to dedicate this research project to my father who showed enormous courage and strength as he was going through the battle of his life fighting potential paralysis after a complicated cervical decompression surgery three days before I started residency #3 in June 2013. Thank you dad for showing me never to give up and that motivation and positivism go a long way.

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ABSTRACT

This research project investigates what is making wine consumers in Toronto buy or ignore wines from Ontario. The concept of *organizational identity*: the features of the company that appear to be central and enduring to internal publics, the internal public in this case being the winery owners, was explored and compared to the *organizational image*: the perception held by customers, in this case wine consumers. The comparison helped determine the *corporate reputation*.

This research project involved in-depth telephone interviews with 15 winery owners and other winery staff members from the Niagara Peninsula and Prince Edward County wine regions. Toronto wine consumers were also solicited to complete a short online survey.

Based on the research findings, the Ontario wine's industry organizational identity can be defined as *an industry with high quality products and beautiful wine regions*. The organizational image based on the research findings can be defined as *an industry with delicious products and beautiful wine regions*. This research project also demonstrate that both groups (key players in industry and wine consumers) are aligned with regards to the importance of quality of the product, an intrinsic attribute. Consequently, having a winery experience and the quality of wine are the two main factors playing a role in building the reputation of Ontario wines.

Finally, this research project delivers an assessment tool designed to determine which wine consumers in Toronto represent the greatest potential of loyal consumers of wines from Ontario.

Keywords: organizational identity, organizational image, corporate reputation.

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INTRODUCTION

The reputation of Canadian wines was enhanced by the introduction of the voluntary Vintners Quality Alliance (VQA) standard in Ontario in 1988 and in British Columbia two years later. The VQA symbol on a bottle of Canadian wine assures consumers of five standards: production, content, varietal percentage, appellation and vintage. Nearly two-thirds of the Canada's vineyards are located in Ontario where there are three main wine regions: Niagara Peninsula, Prince Edward County and Lake Erie North Shore.

Why should the Ontario wine industry be interested in its reputation? Because the most recent available facts on the topic indicate wine consumption in Canada is up: according to a BMO report, Canadian adults in 2011 purchased an average of 22 bottles of wine per year, up from 13 in 1995. Ontario's wine industry has been an engine of economic growth for the province since 2007 (Goertzen, 2012, p.2). A KPMG report indicates revenue reported by the Ontario VQA wine industry has grown by 40% and lead to the creation of over 1,300 additional jobs (KPMG, 2011, p.2). LCBO representatives have also noticed the numbers increasing. "Over the last five years I've seen the trend, I've seen the numbers change. Every year we sell a little bit more Ontario wine," said Astrid Brummer, LCBO Project Manager Ontario Wines (personal communication, December 16, 2014).

The main objective of this paper is to explore the concepts of organizational identity and organizational image in the Ontario wine industry and determine if these two concepts are aligned. The end goal of this research project is to help define the Ontario wine industry's organizational identity and organizational image based on the research findings.

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RESEARCH PROBLEM

What is making wine consumers in Toronto buy or ignore wines from Ontario? A key challenge for wine producers is to achieve a comprehensive understanding of wine consumers' behaviour and buying habits. Wine attributes can be both extrinsic and intrinsic. "Intrinsic attributes are those that are inherent within the wine itself such as taste, type, varietal or blend, alcohol content, and age. Extrinsic attributes are those that are not part of the physical product such as brand, price and label/package," (Lockshin, n.d., p.2). Since most consumers do not have the opportunity to taste the product before purchasing it, this leads the consumer to use extrinsic attributes in the purchasing decision. The four most common extrinsic attributes identified in research concerning wine choice behaviour are brand, region or country of origin, grape variety and price (Lockshin, n.d., p.2). Research has found that wine brand names can act as a replacement for a number of attributes including quality, and act as a short cut for purchasing decision (Lockshin, n.d., p.3).

According to a LCBO survey in 2011, VQA wine sales grew 15% within a year, the fourth consecutive year of a double-digit growth (LCBO, August 19, 2011). Findings showed many Ontario customers going local with their wine purchase.

On a previous smaller research study for the McMaster University Masters in Communications Management program, the current researcher conducted an online survey where data was collected in May 2013. The top three factors identified as the most used by survey respondents when purchasing wine were price and country where it is produced (both with 89,06%) and grape variety (60,94%). The fourth and fifth factors were related to brand (name and reputation). These results corresponded to previous findings from studies conducted in other wine countries (Lockshin, n.d., p.4).

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The researcher suspected the proximity of wine regions might be a negative factor in this research project. However, those who have experienced a wine region in Ontario would have a more positive attitude towards Ontario wines, thus visiting Ontario wineries contributes to enhance the products' reputation. Astrid Brummer, LCBO Project Manager Ontario Wines confirmed this by explaining that consumers in a LCBO store are more willing to try a wine from Ontario if they visited a winery. "Frequently I have someone say '*Oh yes, I went to that winery*'. They had a good experience and they are interested in trying the wine. But what also happens frequently is someone will say '*Oh I passed by that winery*' or '*I saw their sign on the highway*' and it will also be enough of an influencer," (personal communication, December 16, 2015).

RESEARCH QUESTIONS

Answers to the following research questions helped determine what is making wine consumers in Toronto buy or ignore wines from Ontario:

RQ1: Which factors contribute/play a role to the reputation of Ontario wines?

- How important is personal consumer experience, word of mouth and product quality in that process?
- How does reputation impact consumers' purchasing decision?

** tested with online survey targeting wine consumers in Toronto*

RQ2: Are perceptions of key players in the wine industry similar to the perceptions held by wine consumers in Toronto?

- Are organizational image and organizational identity aligned? Is there a gap? If so, how can that gap be closed?

** tested comparing answers from in-depth interviews and online survey*

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RQ3: What sources of information (traditional media and wine experts)

influence/contribute to building reputation/brand awareness of wines from Ontario?

- What sources of information used by wine consumers contribute to building Ontario wines' reputation? How are these used in the purchasing decision?

** tested comparing results from content analysis and online survey*

The researcher limited the public of this research project to wine consumers in Toronto to explore if proximity to Niagara Peninsula and Prince Edward County, the two closest wine regions to Toronto, was an influential factor. Focusing on the two closest wine regions enabled the researcher to more easily control and interpret results to draw conclusions. The Toronto wine consumers also represent a big portion of consumers the Ontario wine industry wishes to attract.

LITERATURE REVIEW

Beverage consumption of Canadian adults

A report produced by the International Markets Bureau in the Agriculture and Agri-Food Canada Department indicated wine climbed to 14.6 litres per person for Canadians aged 15 years and older, representing an increase of almost 46% compared to a decade ago, (2010, p 10). This report also mentions the origin of the product often establishes authenticity, as consumers believe that the source, be it local or exotic, gives the product superior quality. Many food and drink products are associated with a specific location, whether a town, region, or country. “Canada is starting to position its products this way, with VQA wines,” (2010, p 15).

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Furthermore, more and more Millennials are reaching the drinking age, which represents a very interesting opportunity for the wine industry. Studies demonstrate Millennials are drinking more wine and better wine at a young age compared to any other previous generation. In a 2013 Canadian study, Millennials living in Ontario ranked Ontario wines first with regards to quality and value in comparison to other global wine regions, thus representing an interesting growth opportunity for the Ontario wine industry. Another study in 2012 found that "if unsure about making a wine selection, Millennials are more apt to seek information from friend/family and shelf talkers than elders," (Atkin, 2012, p. 54). It has also been demonstrated that the two most common wine occasions for Millennials are *special occasions* and *meals at formal restaurants*, which are common situations for all generations. *Meals at friend's house* and *socializing with friends* are third and fourth. "These reflect Millennials' values of collaboration and work/life balance. It also illustrates that Millennials view wine as more of a social lubricant than perhaps previous generations," (Tach, 2011, para. 5). Canadian Millennials are demonstrating similar wine consuming behaviours to American Millennials and emerging as "a generation of consumers and trend setters," (Nadeau, 2013, p. 3). Canadian Millennials are recommending what they like to other millennials by word of mouth and using social media platforms such as Facebook and Twitter. "Through positive emotions associated with the tasting room experiences, wineries (and wine clubs) can cultivate relationships with Millennial customers that may lead to long-term, profitable relationships through continued patronage and brand loyalty," (Nowak, 2006, p. 316).

The Canadian wine industry

The Canadian wine industry has undergone a remarkable expansion over the past two decades. "While the climate may preclude the sector from becoming an international powerhouse, its reputation on the international stage has grown, and Canadians are

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increasingly reaching for a glass of pinot noir instead of a pilsner,” (Goertzen, 2012, p.1).

Nearly two-thirds of the country’s vineyards are located in Ontario, with the rest concentrated in British Columbia and only a smaller portion in other provinces. While domestic wineries produce around a third of the wine consumed by Canadians, they export very little. Meanwhile, nearly three-quarters of imported wines in Canada come from France, Italy, the United States, and Australia (Goertzen, 2012, p.2).

The wine industry in Ontario is approximately 1/33rd the size of California’s, the largest wine cluster in North America. Nevertheless, the Ontario cluster is celebrated for being a “billion dollar industry” in a national economy (Pelling & Hira, 2012, p.1). Domestic consumption is critical to the Ontario industry and the evolution of Canadian tastes away from spirits toward dry table wine has been immensely beneficial. “The global position of the Ontario wine cluster is between 41° and 44° degrees north, situating it within the “heart of the world’s fine wine zone” which is approximately the latitudinal position of the Burgundy cluster in France,” (Pelling & Hira, 2012, p.1).

Principal critic and partner at Wine Align Janet Dorozynski believes “Canadian wines are relatively unknown – we’re not there in terms of exports or the international network. We are not known internationally,” (Dorozynski, 2011, p.3). However, international wine experts are taking notice of Canadian wines. American wine critic and Wine Spectator columnist Matt Kramer called Ontario “the world’s least-known great wine zone” (Stevenson, 2012. p.9). He has praised Niagara’s chardonnays, “as well as some superb gamay noir, cabernet franc and very promising pinot noir,” (p.9). Jancis Robinson, a well-known English wine critic, has mentioned the steady improvement in Canadian wines.

Niagara has also attracted a group of Canadian celebrities such as former hockey star Wayne Gretzky and professional golfer Mike Weir with their own labels. And

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tourism to Ontario wine country has become big business. “I watched the emergence of quality in Canadian wines and thought getting involved in the wine industry would be a fun and enjoyable way to raise awareness of Canadian wine,” said Mike Weir in an interview with Via Destinations magazine (Acharya, 2013, p.21).

The Ontario wine industry

According to an article in the See Toronto Now magazine, “Southern Ontario is home to not one, but two excellent wine regions. Both the Niagara region and Prince Edward County, annually tender everything from top-shelf gamay to pinot gris,” (Hughes, 2013, p.46). It is interesting that the magazine does not mention the Lake Erie North Shore wine region, the furthest from Toronto. According to Toronto-based master sommelier Jennifer Huether, one of just three in Canada, “the overall quality of wine from Ontario has risen dramatically in the past five years,” (Hughes, 2013, p.46). She believes riesling is the grape leading the charge in Ontario and great soils and a still-cool climate are the secret weapons of Ontario wine regions. “Thanks to global warming, places like Bordeaux and Tuscany are getting even hotter. So we take advantage of having balanced, elegant and age-worthy wines”, says Huether (Hughes, 2013, p.46). Huether also believes Ontario wines might fool a sommelier into thinking it was French or Italian in a blind test. “The premium single-vineyard chardonnay from Tawse could easily pass for a Burgundy,” she says (Hughes, 2013, p.46).

In 2013, Globe and Mail’s wine critic Beppi Crosariol wrote “most fans of chardonnay, the world’s most popular white wine, might be surprised at the taste of one of the best Ontario chardonnays this year,” (Crosariol, March 26, 2013). Jim Willwerth, senior staff scientist in viticulture at Brock University’s Cool Climate Oenology and Viticulture Institute in St. Catherines, Ontario, says “our climate is well suited to yielding high concentrations of monoterpenes, the compounds responsible for the floral-spicy

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characters of musqué that might otherwise bake away in the heat of California, Chile or Australia,” (Crosariol, March 26, 2013).

The LCBO supports VQA wines with additional shelf space in its stores, increased product listings, staff training and year-round promotional activities. “Working with the LCBO to promote the “go” local trend, VQA wines have become the frontrunner in sales growth and the natural choice for wine drinkers seeking quality, versatility and value,” says Hillary Dawson, President of the Wine Council of Ontario (website Wines In Niagara.com, Aug 22, 2011). According to Bob Downey, LCBO Senior Vice President, Sales & Marketing, Ontario winemakers produce high-quality, versatile, award-winning wines. “Ontario wineries have also developed appealing new brands with attractive packaging and innovative marketing,” says Downey (website Wines In Niagara.com, Aug 22, 2011).

Ontario wine country’s regions

Ontario wine country is comprised of three regions: the Niagara Peninsula, Prince Edward Country and Lake Erie North Shore. The character of each region is unique as the wines that are created there. The total number of wineries in Ontario varies depending on which website or piece of information is consulted. For the purpose of this research project, the investigator decided to use the number of VQA wineries, 150, which is provided on the “Ontario VQA Wine Industry Key Facts and Statistics” page of the Wine Country Ontario website. The VQA Ontario designation on a bottle means the wine is made from 100% Ontario-grown grapes, which have been approved through a strict quality-assurance program (“What is VQA”, para. 2).

The Niagara Peninsula is Canada’s largest wine region, with 5,500 hectares of grapevines and 85 wineries. It is known for its sparkling wine, specific chardonnay, cabernet franc and pinot noir. The Niagara Peninsula “sits at about 43 degrees north

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latitude, the same as the *chianti classico* area of Italy or Mendocino Country,”

(Stevenson, 2012, p.68).

The Prince Edward County wine region started emerging about a decade ago. Since it was granted official VQA status in 2007, “it has quietly grown into Canada’s third-largest wine region with close to 40 wineries,” (Stevenson, 2012, p.94). However, out of those 40 wineries, only 30 are VQA wineries (“Prince Edward County Wineries”, para. 1). This region is known for its chardonnay, pinot noir, cabernet franc, riesling and pinot gris.

The third Ontario wine region, Lake Erie North Shore, has fewer than 20 wineries but is home to the oldest winery in the country, the Pelee Island Winery, dating back to 1865. This region sits “on the 42nd parallel, the same latitude as the great wine growing regions of southern France, northern California, Germany and Spain,” (Stevenson, 2012, p.107). Until 2012, Pelee Island was its own appellation, but with just one winery of the same name, it was absorbed into Lake Erie North Shore. This region is known for its ice wines and fruit wines, cabernet sauvignon and franc, pinot noir and chardonnay.

The Wine Council of Ontario (WCO), a non-profit trade association, represents most Ontario wineries. WCO’s members are grape growers, manufacturers and leaders in tourism. WCO’s role is to promote Ontario VQA wines. It has developed a comprehensive website where anyone can use the wine route planner to customize a visit to “Ontario wine country”.

Furthermore, the Ontario Wine Society, which targets consumers, is composed of various chapters across the province. It does a lot of promotion for the Ontario wine industry, including hosting promotional events. There are various activities organized at the different wineries across the province during the year, in addition to special events

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such as festivals where the products of various wineries are displayed under the same place.

Economic Impact

The Ontario VQA wine industry had demonstrated significant success in a short time. According to a KPMG report prepared for the Wine Council of Ontario, revenue reported by the Ontario VQA wine industry grew by 40% from 2006 to 2011 (KPMG, 2011, p.1). An article in the Windsor Star reported “Ontario’s grape and wine industry provides 6,900 jobs and contributes \$529 million in economic value to the province,” (Whipp, April 3, 2013). Wine tourism is becoming an increasingly important factor in the economy of the Niagara region and elsewhere in Ontario. As a tourism destination, Niagara attracts nearly 20 million visitors annually; over 1 million people visit the province’s wineries each year. Additionally, 1% of American tourists, and 6% of Canadian tourists indicate wineries as a main reason of interest for visiting Niagara Falls. Wine tourism in the region is expected to grow by 20% in the Canadian market and 28% in the American market by 2025 (KPMG, 2011, p.2).

Factors influencing consumer purchasing behaviour

The competition among wine producers is more and more complex and challenging. European countries traditionally dominating world wine industry, such as Italy, France and Spain, have increasingly faced an intense competitive pressure along with a decrease of wine consumption, while the “New World” countries, including United States, Australia, South Africa, Chile and Argentina, have experienced a significant growth both in production and consumption. At the same time, “quality has become a central element in wine purchase decision, especially in traditional wine-drinking countries, where customers have shifted toward wines with regional or vineyard

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designations,” (Riviezzo, 2011, p.2). Therefore, a key challenge for wine producers is to achieve a comprehensive understanding of wine consumer’s behavior and buying habits.

Country of origin has been defined as an extrinsic cue that acts as a risk mitigant or quality cue for consumers,” (Watson & Wright, 2000, p.1151). Such extrinsic cues (others include price, brand name, warranties) serve as intangible product traits that contrast with intrinsic cues (e.g., taste, design), which are tangible aspects or physical characteristics of the product itself. The idea of consumer ethnocentrism is applicable to wine purchasing decision: the “willingness to purchase an admittedly inferior product because it is manufactured domestically,” (Watson & Wright, 2000, p.1160).

It is presumed that consumers would conduct a search for information prior to their purchase, but research suggests “there is very little external search effort undertaken prior to entering the store to purchase wine,” (Lockshin, n.d., p.4). Research found that brand name acts as a replacement for a number of attributes including quality and acts as a short cut for purchasing decision. However, it is not clear if consumers have a clear understanding of branding in the wine industry. “Consumers tend to infer the same status to generic types – grape and region – as they do to specific brands,” (Lockshin, n.d., p.4).

Identifying the region where the wine is from has created the opportunity of using “regional branding” as a differentiator tool. For instance, Australian wineries are using wine tourism to provide opportunities to build brand loyalty and it can be a key marketing activity. “It enables wineries to meet their customers face-to-face and gives them an opportunity to raise the profile of their products in the customer’s mind. Customers may then develop a long-term connection with a product that they have sampled at the place of its origin,” (Lockshin, n.d., p.5).

Tom Atkin’s study for the Sonoma University found an interesting relation between region of origin of a wine and the drinking frequency of a consumer. Consumers

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who drink wine on a daily basis rely more on region than those who drink a few times a month. In addition, consumers who are not heavy wine-drinkers might have less knowledge about wine and would rely more on price or medals when they could not find sufficient information on the wine. (Atkin, n.d., p.185). This research represents a good opportunity to explore a possible relation between regular Ontario wine drinkers, their awareness for wines from Ontario and their consumption of Ontario wines.

Informed vs less informed wine consumers

Consumers' choices might be affected by shelf information displays. Except for highly informed wine drinkers who enjoy the search process, many wine consumers are overwhelmed by the number of wines available to them in a retail store. At the same time most wine buyers want to make a quick decision. "While highly involved wine drinkers have a detailed understanding of how wine regions, producers and grape varieties interact and influence how the wine will taste, most consumers have difficulties in understanding these interactions," (Mueller, n.d., p.2).

Differences have also been found between types of consumers and location where to purchase wine. Informed wine consumers that were more brand and product conscious tended to buy wine at specialty stores and wine shops, while less informed wine consumers purchased low cost wines and wines in large volume casks at discount shops. (Barth, Sean & Salazar, 2010, p.3). Barth, Sean and Salazar's study showed some other interesting differences between less informed and informed wine drinkers. For instance, less informed and informed drinkers showed a significant difference in how they purchased wine with a meal. Less informed wine drinkers preferred to purchase wine by the glass, while informed drinkers purchased wine by the bottle. "Informed wine drinkers have a base of knowledge that allows them to know how certain wine varietals pair with meals," (Barth, Sean & Salazar, 2010, p.4).

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THEORETICAL CONCEPTS

A number of theoretical concepts were explored in this research project: *organizational identity*: the features of the company that appear to be central and enduring to internal publics, the internal public in this case being the winery owners, was explored and compared to *organizational image*: the perception held by customers, in this case wine consumers (Fombrun, 1996). The comparison helped determine the *corporate reputation*: what is actually known by both internal and external stakeholders, which can be positive or negative (Walker, 2010). Studies demonstrate a positive corporate reputation is correlated with a range of desirable business outcomes, such as customer satisfaction, loyalty, trust and positive word of mouth (Walsh & Beatty, 2007). Finally, *stakeholder perceptions* build competitive advantage (Davies, Chun, DaSilva, & Roper, 2003).

A company's identity and image need to be aligned. This was the key concept of this research project which explored the degree to which outsiders' perceptions of the organization were consistent with those of internal members (Foreman, Whetten & Mackey, 2012, p.183). "Reputation management involves harmonizing the two, and that harmony produces financial value," (Davies, Chun, Da Silva & Roper, 2003, p.xi).

Davies, Chun, Da Silva & Roper argue "image is not closely linked to behaviour. Image is more associated with satisfaction and, most probably, satisfaction drives customer behaviour (loyalty) which in turn drives financial performance," (2003, p.171). How does the experience at a winery affect satisfaction and behaviour (loyalty) in comparison to those who have never been to a winery and the image they have developed? "Companies must recognize the powerful constraining effects that

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stakeholder perceptions have on the ultimate success of their initiatives,” (Fombrun, 2004, p.261).

Reputation also affects media coverage. But how does media coverage affect consumers’ perceptions, in this case wine consumers in Toronto? The content analysis provides an insight into Ontario wines’ media reputation based on media coverage. Studies have demonstrated that “the predictive validity of favorable media coverage is greater than the total media coverage received,” (Dowling & Gardberg, 2012, p.49). Therefore, what is more important for the building of the Ontario wine industry reputation? Favorable coverage (quality) or a lot of media coverage (quantity)?

METHODOLOGY

This research project explored Ontario wines' reputation from the perspective of wine consumers in Toronto with the following three research methods: content analysis, in-depth interviews and an online survey.

1) First, a content analysis of what was published overall on Ontario wines in Toronto in 2014 in traditional media was conducted where 49 article were analyzed. A second content analysis of what was published the first three months of 2015 by two prominent wine critics in Toronto, Beppi Crosariol from the *Globe and Mail* and Gord Stimmell from the *Toronto Star*, was also conducted. In this second content analysis, 78 articles from Beppi Crosariol from the *Globe and Mail* and 17 articles from Gord Stimmell of the *Toronto Star* were analyzed. Finally, a third content analysis of the LCBO website was conducted April 2, 2015 for the six months prior to that date to investigate if Ontario wines are promoted on the LCBO website.

2) In-depth telephone interviews were conducted with 15 winery owners and other

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winery staff members. Recruitment began November 4, 2014 when 14 wineries in Prince Edward County and 14 in Niagara Peninsula were approached by email (recruitment script available in Appendix A). A recruitment message was also posted on the student investigator's Twitter account November 7, 2014 (see Appendix B). On November 10, 2014 organizations with contacts in the Ontario wine industry, such as the Ontario Wine Society, Ontario Wine Country and VQA Ontario, were contacted to help with the recruitment (recruitment script available in Appendix C).

The first interview was held on November 5, 2014 and the last was conducted January 27, 2015. Ten interviews were done with key players from the Niagara Peninsula region while five interviews were with key players from Prince Edward County.

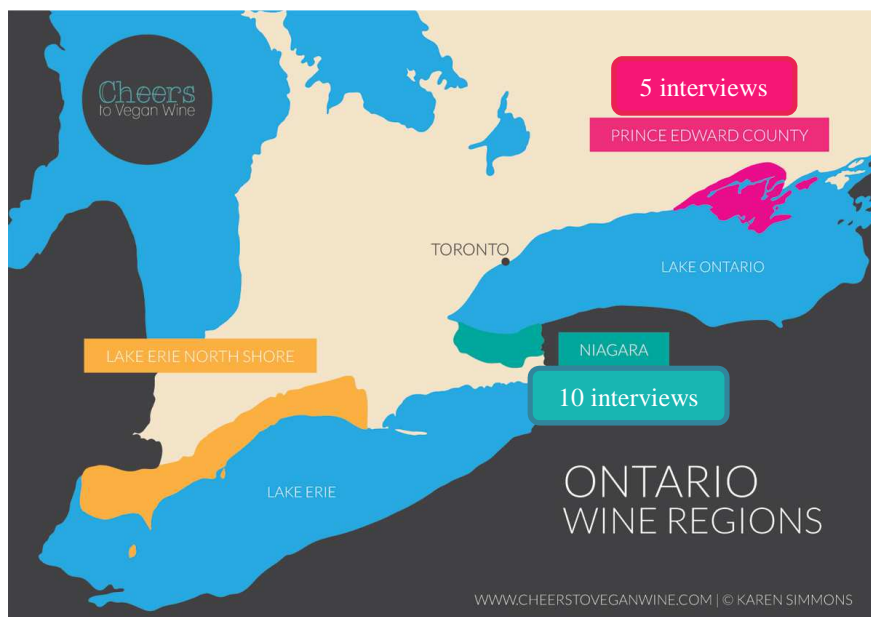


Figure 1. Interviews were conducted with key players from the two closest wine regions to Toronto. Source: www.cheerstoveganwine.com

Key players in the Ontario wine industry taking part in the individual in-depth interviews gave the consent orally since the interviews were conducted over the telephone. The consent information was read to participants before the interview

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questions began and participants were asked if they agreed or not. The student

investigator created a consent log for interviews (see Appendix D).

In the recruitment phase, identities were kept anonymous since potential participants were always contacted individually. Furthermore, in-depth interviews were conducted individually, therefore participants did not know about each other nor did the student investigator ever name participants to other participants during interviews. In the data collection phase the student investigator noted participants' identity to ensure the right data was collected for the right participant. In the data storage phase, notes collected by the student investigator included participants' identities to ensure the right data was collected for the right participant but only the student investigator had access to this data, therefore ensuring the anonymity of all participants in this stage of research.

3) An online survey targeting wine consumers in Toronto was launched April 14, 2015 and closed on May 3, 2015 and 60 online surveys were completed.

The student investigator approached friends and acquaintances in Toronto by email to complete the online survey and encouraged them to share it with their friends and acquaintances creating a snowball sampling (recruitment script available in Appendix E). A recruitment message was also posted on the student investigator's Twitter account (see Appendix F).

All data collected was stored on the student investigator's personal laptop and only she had access to this computer at all times. Any data collected on paper (notes from interviews) and recordings (interviews) was kept in a closed safe in the student investigator's house. The research data will be deleted when this research project will be completed: paper notes will be shredded and audio recordings and computer files will be erased.

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Qualitative data was more appropriate for this research because the student investigator was looking for explanations of aspects, descriptions and experiences. Qualitative data made it better to understand attitudes and qualifications.

“Juxtaposing stakeholder perceptions against actual communications provide the raw material for a gap analysis, an examination of the degree to which perceptions of the company are in alignment with the reality of the company,” (Fombrun, 2004, p.258). This is what was tested when juxtaposing the results from the interviews with the key players in the Ontario wine industry to the content analysis and the results from the online survey with wine consumers.

RESULTS

Content Analysis

Three different content analyses were conducted to investigate the research question what sources of information (traditional media and wine experts) influence and/or contribute to building reputation/brand awareness of wines from Ontario.

2014 traditional media

A first content analysis of what had been published overall on Ontario wines in Toronto in 2014 in traditional media was conducted and 47 articles were analyzed. These articles were selected because Ontario wine was mentioned and the objective was to determine which major topics were discussed when Ontario wine was mentioned. The table in Appendix G indicates in detail the space Ontario wines had in traditional media in 2014.

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This content analysis found that close to half of the articles were related to government policy.

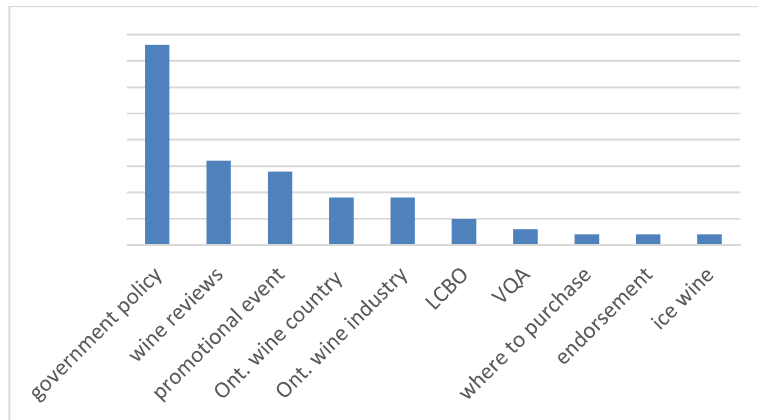


Chart 1. Topics in traditional media articles published in 2014 where Ontario wines were mentioned.

Most often these articles had a negative tone because it discussed the LCBO's monopoly position, managed by the provincial government. This coverage in government policy also resulted from the publication of a report from the Toronto-based C.D. Howe Institute in the summer of 2014 that argued that both the LCBO and the Beer Store should not have exclusive rights to sell beer, wine and spirits. The report concluded consumers in Ontario are paying too much. The articles with positive tone earlier in 2014 and related to government policy came after the Ontario provincial government allowed wines from Ontario to be sold at Farmers' Market. Overall, the tone of what was published on Ontario wines in Toronto in 2014 in traditional media was more positive (in 33 articles) than negative (in 20 articles).

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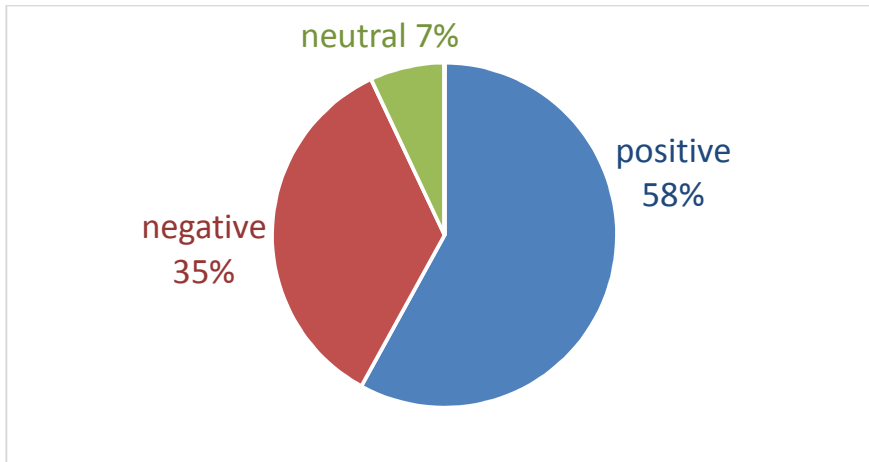


Chart 2. Tone in traditional media articles published in 2014 where Ontario wines were mentioned

2015 wine critics

A second content analysis of what was published the first three months of 2015 by two prominent wine critics in Toronto, Gord Stimmell from the *Toronto Star* and Beppi Crosariol from the *Globe and Mail*, was also conducted. The objective was to investigate how many times these popular wine critics mentioned Ontario wines in their critics and reviews in comparison to wines from other regions, as well as how they described wines from Ontario.

The *Toronto Star*'s wine critic Gord Stimmell wrote 27 articles the first three months of 2015. Of those 27 articles, 17 were relevant for this content analysis because they were published in the *Toronto Star*. The other 10 articles from Gord Stimmell that were discarded were published in the *Hamilton Spectator*, the *Waterloo Record* and *Guelph Mercury*. Of the 17 articles published in the *Toronto Star*, only 3 (18%) featured a wine from Ontario.

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Table 1

Ontario wines featured in the Toronto Star's Gord Stimmell wine reviews (January 1 to March 30, 2015)

Articles analyzed	How many wines featured in the article?	How many wines from Ontario featured in the article?	Which wine from Ontario was featured?	Wine colour	From which Ontario wine region?	How was the wine from Ontario described?	Was description positive or negative?
February 28	5	1	Southbrook Cabernet	Red	Niagara	Local Hero	Positive
February 14	7	1	Henry of Pelham Baco Noir	Red	Niagara	Exceptional Forking out \$25 for a Baco Noir is intimidating	Positive Negative
January 3	5	2	Andrew Peller Sauvignon Blanc Burning Kiln Stick Shaker Savagnin	White White	Niagara Niagara	Very classy Wonderfully eclectic local expression	Positive Positive
<i>Total summary: 3 articles</i>	17	4		2 whites 2 reds	4 Niagara		4 positive 1 negative

This content analysis of Gord Stimmell's articles in the *Toronto Star* demonstrate very few of his articles feature wines from Ontario: his three articles analyzed in this content analysis featured 17 wines but only four were from Ontario. And no article was exclusively dedicated to a wine from Ontario. However, the few wines from Ontario featured received a positive review. The one negative attribute was related to price. Finally, Gord's selection did not show a preference for red or white. However, the Niagara Peninsula was the only Ontario wine region featured in his reviews of wines from Ontario.

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During the first three months of 2015, Beppi Crosariol wrote 78 articles reviewing wines published in the *Globe and Mail*. Of those 78 articles, 14 (17%) featured one or more wines from Ontario.

Table 2

Ontario wines featured in the Globe and Mail's Beppi Crosariol wine reviews (Jan 1 to March 30, 2015)

Articles analyzed	How many wines featured in the article?	How many wines from Ontario featured in the article?	Which wine from Ontario was featured?	Wine colour	From which Ontario wine region	How was the wine from Ontario described?	Was description positive or negative?
April 2	1	1*	Southbrook Poetica Chardonnay	White	Niagara	Sumptuous	Positive
March 28	9	2	Vineland Estates Riesling	White	Niagara	Always a good Riesling producer	Positive
						Struck gold with this white	Positive
						Could compare with fine examples from Germany	Positive
			Flat Rock Riesling	White	Niagara	Brilliant mix	Positive
March 25	5	1	<i>Cave Spring Gewürztraminer</i>	White	Niagara	Canada excels with this grape	Positive
March 25	4	1	Reif Estate Meritage Red	Red	Niagara	Terrific	Positive
March 18	6	1	Tawse Sketches Riesling	White	Niagara	Smartly balanced	Positive
						Brilliant match	Positive
March 16	1	1*	Reif Estate Meritage Red	Red	Niagara	Terrific	Positive
March 10	1	1*	Tawse Sketches	White	Niagara	Smartly balanced	Positive

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			Riesling			Brilliant match	Positive
March 4	1	1*	Ridge Road Riesling	White	Niagara	Ideal	Positive
February 28	11	4	Andrew Peller Sauvignon Blanc	White	Niagara	Iconic High end	Positive
			Château des Charmes Riesling	White	Niagara	Best-value	Positive
			Foreign Affair Dream	Red	Niagara	Formidable Compelling Fine match	Positive
			Bricklayer's Reward Block 7 Cabernet Sauvignon	Red	LENS	Pretty Good choice	Positive
							Positive
February 18	5	1	Peninsula Ridge Pinot Grigio	White	Niagara	Nails the Italian style well	Positive
February 10	1	1*	Peninsula Ridge Pinot Grigio	White	Niagara	Nails the Italian style well	Positive
February 7	8	1	Huff Sparkling Rosé	Rosé	PEC	n/a	Neutral
February 4	5	1	Henry of Pelham Chardonnay	White	Niagara	Well-crafted	Positive
January 27	1	1 *	Henry of Pelham Chardonnay	White	Niagara	Well-crafted Versatile	Positive
<i>Total summary: 14 articles</i>	59	18		13 whites 4 reds	16 Niagara 1 PEC		

* wine review (complete article) dedicated exclusively to a wine from Ontario

This content analysis of Beppi Crosariol's articles in the *Globe and Mail* demonstrate close to a third of the wines he reviewed the first three months of 2015 were from Ontario: his 14 articles analyzed in this content analysis featured 59 wines and 18 were from Ontario. An interesting difference worth mentioning is that compared to what

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was found with the content analysis of Gord Stimmell's articles in the *Toronto Star*,

Beppi Crosariol dedicated six reviews (articles) exclusively to a wine from Ontario.

Furthermore, unlike Stimmell, Crosariol was more inclined to review white wines from Ontario. Similarly, Crosariol also demonstrated a preference for wines from the Niagara Peninsula wine region.

Overall, these two content analyses of two wine critics demonstrate Ontario wines are not prominently featured in their wine reviews. But the *Globe and Mail* readers are more likely to read about wines from Ontario compared to readers of the *Toronto Star*.

LCBO website

Finally, a third and final content analysis of the LCBO website was conducted April 2, 2015 to investigate if Ontario wines are promoted on the LCBO website. We can quickly notice the LCBO website has a "LOCAL" tab where two "*Ontario Wine Superstars*" are listed every month:

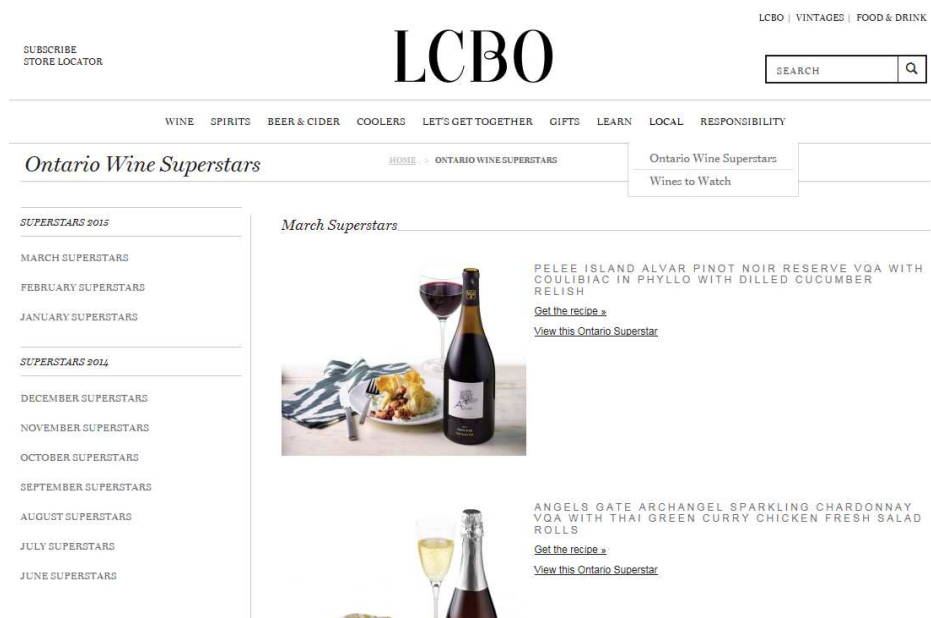


Figure 2. Ontario wine superstars featured on the LCBO "local" tab online.

Source: <http://www.lcbo.com/content/lcbo/en/local/superstars.html>

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Table 3 below indicates the Ontario superstars the LCBO highlighted on its

website the 6 months prior to when the content analysis was conducted:

Table 3

Ontario wines featured on the LCBO's "local" tab online (October 2014 to March 2015)

Month	Wine	Winery	Region	Words to qualify
March 2015	Pinot Noir Reserve	Pelee Island Winery	Pelee Island	n/a
March 2015	Sparkling Chardonnay	Angels Gate Archangel	Niagara	n/a
February 2015	Cabernet	Vineyards Estates Wines	East York	Delicious, local and affordable
February 2015	Chardonnay	Château des Charmes	Niagara-on-the-Lake	n/a
January 2015	Blend Cabernet Sauvignon & Cabernet Franc and Shiraz	Diamond Estate Wines	Niagara-on-the-Lake	Delicious, local and affordable
January 2015	Chardonnay	Peninsula Ridge Estates Winery	Niagara	n/a
December 2014	Baco Noir Reserve	Sandbanks Estate Winery	Prince Edward County	Hidden gem
December 2014	Blanc De Blancs	Cave Spring Cellars	Niagara	n/a
November 2014	Cabernet Merlot	Peller Estates	Niagara-on-the-Lake	delicious local red
November 2014	Rosé bubbly	Henry of Pelham	Niagara	elegant Ontario bubbly
October 2014	Cabernet Merlot	Cave Spring Cellars	Niagara	local red
October 2014	Pinot Grigio	G. Marquis The Red Line	Niagara	n/a
<i>Total summary: 12 articles</i>	13 wines	12 wineries	6 Niagara 3 NOTL 1 PEC 1 Pelee Island 1 East York	Qualifiers used 6 times

This content analysis of the LCBO's "LOCAL" tab indicates that out of the 13 wines featured in this content analysis:

- With regards to type featured: 50% (6) were red, 40% (5) were white and 10% (1) was rosé.

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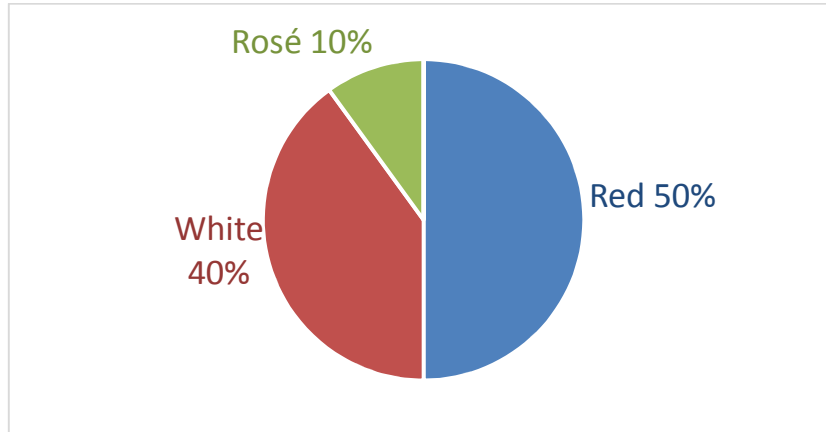


Chart 3. Type of wine featured on the LCBO's "local" tab online (October 2014 to March 2015)

- With regards to Region featured: (76%) 9 were from Niagara, 8% (1) from Prince Edward County, 8% (1) from Pelee Island and 8% (1) from East York.

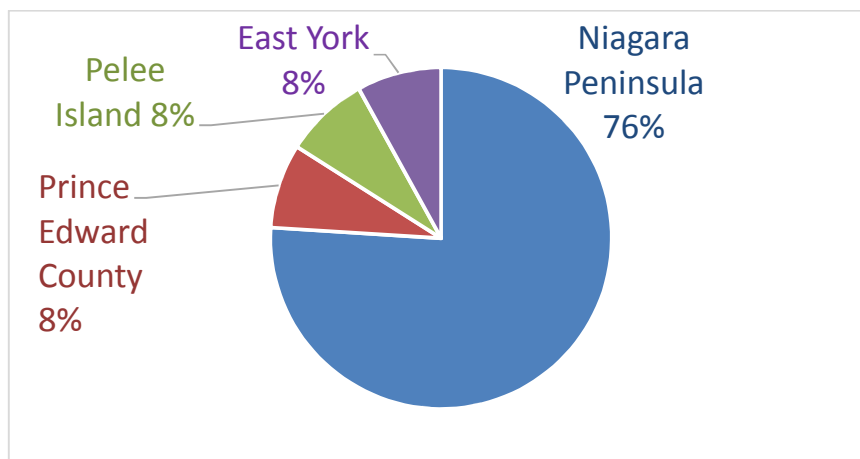


Chart 4. Region featured on the LCBO's "local" tab online (October 2014 to March 2015)

- With regards to words used to describe the wines, qualifiers were used only 50% of the time. In instances when qualifiers were used to describe the wines, the words chosen were positive: delicious, affordable, gem and elegant

This content analysis of the LCBO's "LOCAL" tab thus demonstrates the LCBO playing a part in promoting Ontario wines on its website, although with a preference towards the Niagara region and not consistently using qualifiers when describing the wines.

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RESULTS

In-depth interviews

In-depth telephone interviews with 15 winery owners and other winery staff members were conducted between November 5, 2014 and January 27, 2015. Ten interviews were done with key players from the Niagara Peninsula wine region while five interviews were with key players from Prince Edward County. The list of questions discussed during the interviews can be found in Appendix H. Participants in the in-depth interviews have an average of 18 years of experience in the wine industry, ranging from 5 years to 37 years. Table 4 below indicates who was interviewed for this part of this research project:

Table 4

Participants in the in-depth telephone interviews research phase

Participant's Name	Participant's Winery	Participant's Title	Wine Region
Sherry Martin Karlo	Karlo Estates	Partner	PEC
Norman Hardie	Norman Hardie Winery	Owner	PEC
Jason Sharpe	Huff Estates	General Manager	PEC
Michèle Bosc	Château des Charmes	Director of Marketing	NOTL
Edward Madronich	Flat Rock Cellars	President	Niagara
Stephen Gash	Malivoire	Managing Director	Niagara
Dave Gillingham	Domaine Darius	Head Wine Maker	PEC
Paul Speck	Pelham Estate	President	Niagara
Thomas Pennachetti	Cave Spring Cellars	Vice-President, Sales & Marketing	Niagara
Daniel Lafleur	Tawse	National Sales Manager	Niagara
Lynn Sullivan	Rosehall Run	Managing Partner	PEC
Adine Fabiani	Andrew Peller Ltd.	National Marketing Director, VQA Wine	NOTL
Krystina Roman	Rosewood Estates Winery	Sales & Marketing	Niagara
Barry Katzman	Mike Weir Wine Inc. Stoney Ridge Estate Winery	President	Niagara
Bill Redelmeier	Southbrook Vineyards	Owner	NOTL

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In the section of the interview where participants' perceptions of Ontario wine country were assessed, questions 2 and 3, two thirds of participants agreed with the statement *Canada is not a country known and/or recognized for its wine* while a third expressed the situation is changing.

Participants were also asked if they thought the information that the Ontario grape and wine industry provide 6,900 jobs and contribute to \$529 million in economic value to the province of Ontario was promoted enough and important to wine consumers in Toronto. Although almost all participants think this information is not promoted enough, only half believe this kind of information is important to wine consumers in Toronto.

Questions 4 to 7 assessed the perceptions participants had of Ontario wines. When asked question 4, what words they would use to describe wines from Ontario, as expected they had positive things to say. There were more positive attributes than negative ones used by participants as demonstrated in table 5 below. High quality, finesse, fresh and delicious were common words used to describe wines from Ontario by key players in the Ontario wine industry.

Table 5

Interview participants' words to describe wines from Ontario

Positive attributes		Neutral attributes	Negative attributes
High quality (3x)	Organic	Cool climate (2x)	Undervalued
Finesse (2x)	Tasty	Local	Underappreciated
Fresh (2x)	World class		Undiscovered
Delicious (2x)	Food friendly		
Complex	Growing reputation		
Distinct	Elegance		
Fantastic	Vibrant		
Artisanal	Great wines		
Great value	Friendly		
Excellent			

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Question 5 asked participants their thoughts on the perception wine consumers in Toronto have of wine from Ontario. They had generally more positive things to say compared to negative as illustrated in table 6 below:

Table 6

Perception of wine consumers in Toronto according to interview participants

Positive attributes	Neutral attributes	Negative attributes
Knowledgeable (2x)		“meh” unimpressed
Young open minded		Skeptical
Changing		Average
Growing appreciation		Unconvinced
Appreciated		Unglamorous
Improving		Low esteem
Young desire local		Expensive
Whites excellent		Red not great yet
Passionate		

In question 6, participants were asked what words they would use to describe wine regions in Ontario. Once again, as expected, participants had positive things to say as shown in table 7 below. It is interesting to note various attributes were specifically identified to describe the Prince Edward County wine region.

Table 7

Interview participants’ words to describe wine regions in Ontario

Positive attributes		Neutral attributes	Negative attributes
Beautiful (12x)	Proximity	Cool climate region	Inferiority complex
Unique (2x) (PEC)	Spectacular		
Emerging (PEC)	Perception changer		
Growing (PEC)	Local		
Quality (PEC)	Sustainable		
Authentic (PEC)	Premium wines		

Question 7 asked participants their thoughts on the perception wine consumers in Toronto have of wine regions in Ontario. This was a difficult question and not all participants provided an answer. Key players from the Prince Edward County wine region showed clearer opinions of what wine consumers in Toronto think of their wine region: fashionable and hipster movement, authentic, changing, favourable position,

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lovely place to visit, unaware of the region, cool vacation place, getting more on the radar and trend setters know about PEC.

Questions 8 to 13 assessed participants' knowledge of Toronto wine consumers' behaviours. The purpose of question 8 was to get participants to discuss which factors the Ontario wine industry should focus on to influence purchasing decision. The *quality* of wines from Ontario was the most common answer to question 8: two thirds of participants mentioned it as the factor to be used to promote wines from Ontario and influence the purchasing decision of wine consumers in Toronto. Others factors mentioned were pride, origin, reputation, branding and price.

In question 9, participants were asked why they thought wine consumers in Toronto visit or do not visit wineries in Ontario. The answers to question 9 are indicated in table 8:

Table 8

Reasons wine consumers in Toronto visit or do not visit a winery in Ontario according to interview participants.

Reasons to visit a winery in Ontario	Reasons not to visit a winery in Ontario
Proximity of wine country (3x)	Traffic (2x)
Winery experience (2x)	Perception it's for wine snobs or need to be a real connoisseur
Explore (2x)	Not exotic or cool enough
To buy wine (2x)	Lack of interest for wines from Ontario
Lifestyle choice	
Don't have a cottage	
Foodie	
Education - to learn about wine	

In question 10, participants were asked why they thought wine consumers in Toronto purchase or do not purchase a bottle of wine from Ontario. The answers to question 10 are indicated in table 9:

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Table 9

Reasons wine consumers in Toronto purchase or do not purchase a bottle of wine from Ontario according to interview participants

Reasons purchase bottle of wine from Ontario	Reasons do not purchase bottle of wine from Ontario
If they visit a winery in Ontario (2x)	Lack of awareness (4x)
See endorsement from Toronto restaurants	Past reputation wine from Ontario not good (2x)
More educated wine consumers	Expensive

With question 11, participants were given the opportunity to discuss where they think wine consumers in Toronto get their information about wines. By answering this question, participants identified perceived wine influencers.

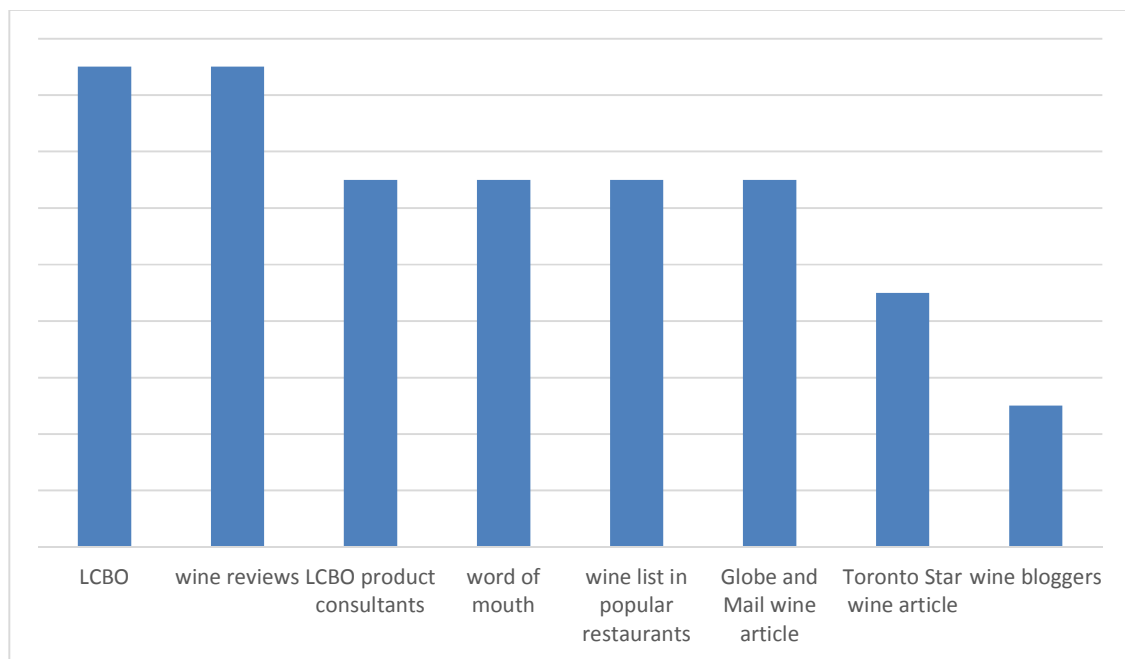


Chart 5. Where wine consumers in Toronto get their information about wines according to interview participants

Participants were then asked in question 12 if they see an increase in sales after winery tours. Twelve out of 15 participants answered “yes” to this question without hesitation while three were not sure.

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Finally, the purpose of question 13 was to assess how important wine tourism is in a winery's strategy and all 15 participants responded it is an important strategy for them and their winery.

RESULTS

Online survey

An online survey targeting wine consumers in Toronto was launched April 14, 2015 and closed on May 3, 2015 with 60 surveys completed online. A copy of the online survey may be found in Appendix I.

The purpose of *Question 1, What are the occasions when you might enjoy drinking wine?*, was to simply gather information on the respondents. The results demonstrate two distinct behaviours: 24% of respondents have specific times for drinking (i.e. evenings, Friday,...) while 60% drink wine on special occasions (i.e. with friends, weddings,...). The remainder 16% of respondents indicated not needing a specific reason for drinking and anytime was a good time for wine.

The purpose of *Question 2, Which type of wine do you prefer?*, was also to gather information on the respondents and demonstrated that 78% prefer red wine. Another question destined to gather information on respondents was *Question 3, Are you a member of a wine club?* and 22% indicated yes. Furthermore, respondents who answered yes were all members of wine clubs in Ontario except for one respondent.

Respondents' knowledge of Ontario wine country was tested with *Question 4, Indicate the three biggest wine regions in Ontario* and 43% of respondents identified the three biggest wine regions in Ontario correctly. Twenty-three percent identified two wine regions correctly and the one most often not cited was Lake Erie North Shore. Twenty-eight percent identified one wine region correctly and it was always Niagara. Only 5% of

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respondents were not able to identify at least one of the three biggest wine regions in Ontario. Answers to this question demonstrate respondents of the online survey in this research project can be considered knowledgeable of Ontario's wine regions.

The purpose of *Question 5, What is the total number of wineries in Ontario?*, was also to test respondents' knowledge of Ontario wine country. The correct answer, as indicated in the literature review section, is 150. Only 12% of respondents answered correctly with 30% overestimating this number and 40% underestimating it. Eighteen percent of respondents did not attempt to answer this question indicating "*I have no idea*" or "*Lots*". As indicated in the literature review section, having an official number of wineries in Ontario is tricky because it depends whether someone counts the non-VQA wineries.

Respondents were asked at *Question 6 to Indicate the name of a winery in Ontario*. This question also tested respondents' knowledge of Ontario wine country. Only one respondent was unable to name a winery in Ontario. Wineries from the Niagara Peninsula wine region were the most cited: 81% of the wineries indicated are in the Niagara Peninsula compared to 12% for Prince Edward County and 7% for Lake Erie North Shore. Overall, the two most cited wineries were Inniskillin and Peller Estates, both in the Niagara Peninsula wine region.

On *Question 7*, respondents were asked *How they felt about the following statement: Canada is not a country known and/or recognized for its wine*. Answers show no significant difference with 47% agreeing with the statement, 48% disagreeing and 5% indicating no opinion. However, when answers from members of wine clubs were isolated and analyzed, 69% of those members of a wine club do not agree with the statement.

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Results to *Question 8, Did you know Ontario grapes and the wine industry provides 6,900 jobs and contributes to \$529 million in economic value to the province of Ontario?* indicate the Ontario wine industry should promote the industry's economic impact more in an attempt to develop and increase patriotism towards wines from Ontario. Sixty percent of respondents answered they did not know the Ontario wine industry provided so many jobs and economic value to the province. For *Question 9, Are you surprised by the numbers in the previous question?* 61% of respondents indicated not being surprised by these numbers.

Question 10 tested respondents' preference by asking them *You walk into your regular wine store and there is one bottle from different countries. Considering the price is exactly the same, which would you pick first, second, third, fourth, fifth and last?* The options were Italy, France, Chile, Australia, Canada and California. Canada finished in first place, followed closely by Italy (second) and France (third). California finished in fourth place, just ahead of Australia in fifth place. The last place went to Chile. Results to this question might indicate a patriotic feeling towards wines from Canada and perhaps a certain bias since respondents knew the purpose of this research project was to assess the reputation of the Ontario wine industry.

An interesting observation is that of the 16% of respondents who indicated in *Question 1* not needing a specific reason for drinking and anytime was a good time for wine, half chose a wine from Canada as their first choice to *Question 10*. And of the 22% of respondents members of a wine club, 69% chose a wine from Canada as their first choice to *Question 10*.

The purpose of *Question 11, What factors are important when you are purchasing wine?* was to understand how respondents in this research choose their wine. The options were price, country of origin, grape variety, name of wine, reputation, taste, bottle design,

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bottle shape and label design. Chart 6 below demonstrate the factor clearly finishing in

first place was taste with close to half respondents choosing this factor as the most

important. Grape variety finished second, slightly ahead of country of origin in third and

price in fourth. Further back was reputation in fifth and name of wine in sixth. Finally, at

the complete bottom were bottle design, label design and bottle shape.

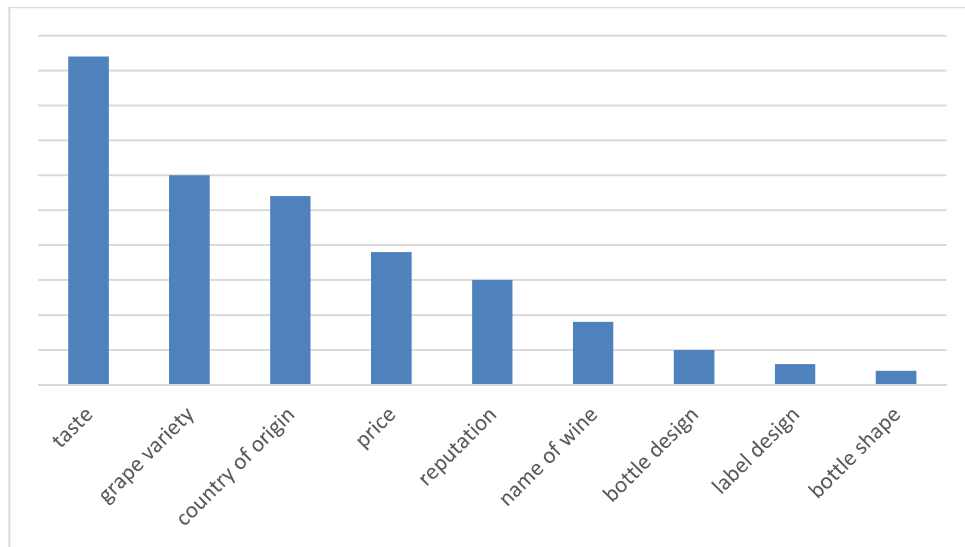


Chart 6. What factors are important when Toronto wine consumers purchase wine

It is therefore interesting to note that respondents do not seem to care about how the wine is presented (extrinsic attributes such as labels and design) and are mainly interested by what is inside the bottle (intrinsic attributes such as taste, grape variety and country of origin).

Answers to *question 12, Have you ever visited a winery?*, demonstrated 83% of respondents had a winery experience. The country most cited was Canada, where 58% of respondents indicated having visited wineries in Ontario. Twenty-six percent of respondents answered international wineries with more than half of those being in France.

The purpose of *question 13, Have you ever visited a winery in Ontario?*, was to determine how many respondents had experienced a winery in Ontario and which winery

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in Ontario had been most visited by respondents. The answers demonstrated 80% of respondents had a winery experience in Ontario. The Ontario region most cited was Niagara, where 54% of respondents indicated having visited wineries in the Niagara Peninsula region. Prince Edward County was second with 13% of respondents having visited a winery in that region. Peller Estates in Niagara-on-the-Lake was the most visited winery in Ontario among respondents of this online survey. A very common answer to this question was “*too many to list*”.

Chart 7 illustrates the answers to *Question 14, Where do you get information about wines?*

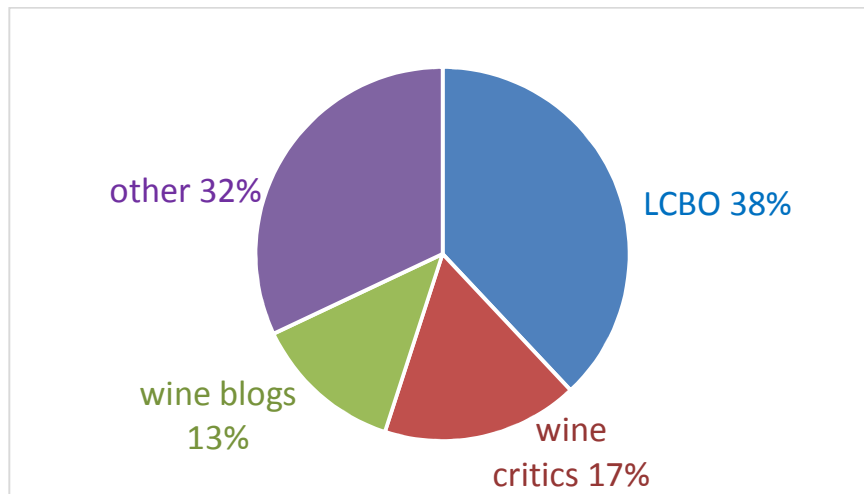


Chart 7. Where do Toronto wine consumers get information about wines

The 32% who answered “other” gave a specification. When respondents indicated “other”, the most common answers were word of mouth, own research, wineries and tasting events. But the 38% of respondents indicating the LCBO as their main source of information about wines does show the importance the LCBO plays in the education of wine consumers.

Of the 9 respondents who answered they had never visited a winery in question 12 and question 13 (a winery in Ontario), 8 out of 9 (88%) identified the LCBO in question

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14 as the place where they get their information about wines. Only 31% of respondents

who had visited a winery indicated the LCBO as the place where they get their

information about wines.

Question 15, What words would you use to describe wines from Ontario? was an open question aiming to explore what respondents thought about wines from Ontario.

Table 10 below contrast positive attributes and negative ones:

Table 10

Survey respondents' words to describe wines from Ontario

Positive attributes		Negative attributes
Delicious (8x)	Well made	Overpriced (2x)
Undervalued (5x)	Thought provoking	Pricey
Good quality (5x)	Flavourful	Unsure
Cool climate (5x)	Very competitive globally	Generic
Fresh (4x)	Aromatic	Yucky
Local (4x)	Crisp	Inconsistent
Varied (4x)	Savoury	Expensive
Good value (4x)	Young	Not complex
Tasty (3x)	Vibrant	Inferior
Great balance (3x)	Fruity	Rubbish
Food friendly (3x)	Great Riesling	Not robust
Unique (2x)	Wonderful	Amateur
Complex (2x)	Creative	
Improving (2x)	Affordable	
Good Chardonnay (2x)	Inventive	
Great body (2x)	Delightful Pinot Noir	
World class (2x)	Exciting sparklings	
Big Reds		
Total positive attributes: 78		Total negative attributes: 13

These results demonstrate respondents had six times more positive things to say about wines from Ontario compared to negative things. The most common positive attribute was “delicious”, which was repeated eight times. Other common positive attributes were cool climate, undervalued and good quality.

Question 16, What words would you use to describe wine regions in Ontario? was another open question aiming to explore what respondents thought about wine regions in Ontario. Table 11 below contrasts positive attributes and negative ones:

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Table 11

Survey respondents' words to describe wine regions in Ontario

Positive attributes		Negative attributes
Beautiful (14x)	Different	LENS region needs works
Weekend/trip getaway (4x)	Wonderful opportunity to try new wines	PEC region has to stop buying grapes from Niagara
Unique (3x)	Interesting	Colder
Quality (3x)	Educational	Tired
Varied (3x)	Curious	Far
Growing (2x)	World class	Room for improvement
Accessible (2x)	Dynamic	Unappreciated
Scenic (2x)	Open	Flat
Local (2x)	Proud	Highly dependent on weather
Friendly (2x)	Picturesque	Under threat from urbanization
Vast (2x)	Approachable	Rubbish
Summer (2x)	Cool	
Fun places to visit (2x)	Established	
In my backyard	Niagara beautiful, accessible, tourism worthy	
Getting better	Niagara region most well known	
Able to play to their strengths	Simple (except Niagara)	
Delightful	Rustic (except Niagara)	
Inviting	Sunny	
Culinary delights	Vibrant	
New	Sophisticated	
Terroir	Trying hard	
Productive	Prosperous	
Different experiences	Under the radar	
Celebrations destinations	Excellent customer service	
Young	Experimental	
Total positive attributes: 90		Total negative attributes: 11

These results demonstrate respondents had eight times more positive things to say about wine regions in Ontario compared to negative things. The most common positive attribute was “beautiful”, which was repeated fourteen times. Other common positive attributes were good weekend/trip getaway, quality, varied and unique.

Question 17, What words come to mind when you think about Prince Edward County? was an open question aiming to test respondents a little deeper and find out what they thought about the specific Prince Edward County wine region. Table 12 contrasts positive attributes and negative ones:

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Table 12

Survey respondents' words to describe Prince Edward County

Positive attributes	Neutral attributes	Negative attributes
Developing (4x)	Pinot Noir (3x)	Don't know much about it (2x)
Rustic (2x)	Sandbanks (2x)	Expensive
Lovely (2x)	Cheese (2x)	Overrated
Beautiful (2x)	Cottage (2x)	Cold winters
Hidden gem	Southern	Rural
Good food and drink	Belleville	Young wines
Lovely	Beaches	
Great to visit	Sunshine	
Undiscovered	Wine	
Historic	New Drake hotel	
Work in progress	Fishing	
Terroir	Lake Ontario	
Touristic		
Charming		
Perfect getaway		
Newer wine region in Ontario		
Pleasant		
Best kept secret		
Total positive attributes: 24	Total neutral attributes: 17	Total negative attributes: 7

These results demonstrate respondents had three times more positive comments about the Prince Edward County wine region compared to negative ones. The most common positive attribute was that this wine region is developing, which was repeated four times. Other common positive attributes were rustic, lovely and beautiful. This question also yielded neutral responses specific to Prince Edward County but irrelevant to wine such as mentions of Sandbanks, cheese and cottage. It is also interesting to note that pinot noir was a common response among three respondents. The Prince Edward County wine region is known for its pinot noirs.

Question 18, What words come to mind when you think about Niagara-on-the-Lake? was an open question aiming to test respondents a little deeper and find out what they thought about the specific wine area of Niagara-on-the-Lake in the Niagara Peninsula wine region. Table 13 contrasts positive attributes, neutral and negative ones:

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Table 13

Survey respondents' words to describe Niagara-on-the-Lake

Positive attributes	Neutral attributes	Negative attributes
Beautiful (7x)	Wine (5x)	Pretentious
Pretty town (6x)	Historic (2x)	Expensive wines
Touristy (6x)	Shaw Festival (2x)	Too crowded
Very good red wine (3x)	Merlot	Dependent on weather
Great place to visit (3x)	Cab Franc	Headache producing wine region
Larger wineries (3x)	Cultural	
Established (2x)	Shops	
Great white wines (2x)	Christmas store	
The Canadian Napa Valley	George Bernard Shaw	
Scenic	Romance	
Entertaining	Casino	
Sophisticated		
Mature		
Warmer climate		
Diversity		
Wine and chocolate		
Fantastic wines		
Fantastic wine tours		
Remarkable		
Hospitable		
Total positive attributes: 44	Total neutral attributes: 17	Total negative attributes: 5

These results demonstrate respondents had close to nine times more positive comments about the wine area of Niagara-on-the-Lake in the Niagara Peninsula wine region compared to negative ones. The most common positive attribute was that it's beautiful, which was repeated seven times. Two other common positive attributes were that it's a pretty town and tourist-friendly, both repeated six times by respondents. This question also yielded neutral responses specific to Niagara-on-the-Lake but irrelevant to wine such as mentions of the Shaw Festival and the casino. However, it is interesting to note the word "wine" came to mind to many respondents.

Question 19, What words come to mind when you think about the Niagara Peninsula? was an open question aiming to test respondents a little deeper and find out what they thought about the specific Niagara Peninsula wine region. Table 14 contrasts what was said positive and what was said negative:

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Table 14

Survey respondents' words to describe Niagara Peninsula

Positive attributes	Neutral attributes	Negative attributes
Beautiful (6x)	Niagara Falls (6x)	Average
Scenic (2x)	Riesling (3x)	Busy
World class (2x)	Water (2x)	Predictable
Capital area of Canadian wine	Mineral	
Warmer	Pinot noir	
Quality	Wineries	
Unassuming	Large	
Unique	Wine	
Varied	America	
Undervalued	Plenty to do	
Friendly	Historical	
Comfy	Hiking	
Sophisticated	Wealthy	
Diversity		
Interesting		
Delicious wines		
Best ice wine		
Great		
Total positive attributes: 24	Total neutral attributes: 21	Total negative attributes: 3

These results demonstrate respondents had eight times more positive comments about the Niagara Peninsula wine region compared to negative ones. The most common positive attribute was that this wine region is beautiful, which was repeated six times. Two other common positive attributes were scenic and world class. This question also yielded many neutral responses specific to Niagara Peninsula but irrelevant to wine such as mention of the Falls. It is also interesting to note that riesling was a common response among four respondents since the Niagara Peninsula wine region is known for its rieslings.

Table 15 summarizes the number of responses for the two wine regions specifically investigated in this research project, in addition to a popular wine area. Overall, respondents had six times more positive comments compared to negative ones. The wine area Niagara-on-the-Lake obtained almost twice more positive attributes compared to the wine regions Prince Edward County and Niagara Peninsula. The number

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of neutral and negative attributes was somewhat similar between the the wine regions and area studied.

Table 15

Total attributes for each wine region

Wine regions or area	Total positive attributes	Total neutral attributes	Total negative attributes
Prince Edward County	24	17	7
Niagara-on-the-Lake	44	17	5
Niagara Peninsula	24	21	3
Total:	92	55	15

The last question of the online survey, *Question 20*, asked respondents to *Please share an experience you have had with a wine from Ontario*. Ten respondents skipped this question. Of the 50 who responded, 78% cited a positive experience with a wine from Ontario, 16% mentioned a negative experience, and 2% had a neutral experience while 4% did not recall having an experience with a wine from Ontario. When looking at the positive experiences more closely, more positive experiences are related to white wine in comparison to red wine. Another interesting discovery with answers from this question is that memorable experiences with a wine from Ontario tend to come from a visit to an Ontario winery. Wineries from the Niagara Peninsula wine region were also mentioned in some of the positive experiences but no wineries from the Prince Edward County wine region were identified.

Finally, the online survey ended by asking respondents for any additional comments. Two respondents questioned why the Lake Erie North Shore wine region was not explored in this research. Some respondents continued describing positive experiences with wines from Ontario. One respondent indicated “*Anyone living in Ontario who hasn’t visited Niagara wine region doesn’t know what surprises await. The wine is truly world class*”.

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DISCUSSION AND RECOMMENDATIONS

Answers to the three research questions helped determine what is making wine consumers in Toronto buy or ignore wines from Ontario.

RQ1 explored factors that play a role in building the reputation of Ontario wines. Personal consumer experience, word of mouth and product quality was investigated as well as how reputation impacts consumers' purchasing decision. Findings tend to show frequent experiences with wines will increase the possibility to choose wines from Canada.

When asked to share an experience with a wine from Ontario, it was interesting to discover that many memorable experiences with a wine from Ontario came from a visit to an Ontario winery. On the other hand, most key players in the Ontario wine industry responded without hesitation they see an increase in sales after winery tours and all agreed wine tourism is an important strategy for them and their winery. Therefore, personal consumer experience does play a role in building the reputation of Ontario wines and there is alignment between wine consumers and key players in the Ontario wine industry with regards to the positive effect of the winery experience factor.

When wine consumers were asked what factors are important when they purchase wine, the factor clearly finishing in first place was taste (thus *quality*) with close to half respondents choosing this factor as the most important. Key players in the industry also responded *quality* should be the factor to focus on when promoting wines from Ontario, therefore demonstrating both groups are aligned with regards to the importance of wine quality, an intrinsic attribute.

Therefore, we can conclude for RQ1 that having a winery experience and the quality of a wine are the two main factors that play a role in building the reputation of

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Ontario wines. And both wine consumers and key players in the Ontario wine industry are aware of these two factors.

RQ2 investigated whether the perceptions of key players in the Ontario wine industry are similar to the perceptions of wine consumers in Toronto. Wine consumers and key players in the Ontario wine industry were asked what words they use to describe wines from Ontario. Wine consumers' top three attributes (delicious, cool climate and quality) are the same attributes in the top five of key players in the Ontario wine industry. This result shows alignment between image and identity regarding quality, deliciousness and cool climate with regards to how both groups describe wines from Ontario. Both groups also shared four other attributes when asked to describe wines from Ontario: value, fresh, food friendly and tasty.

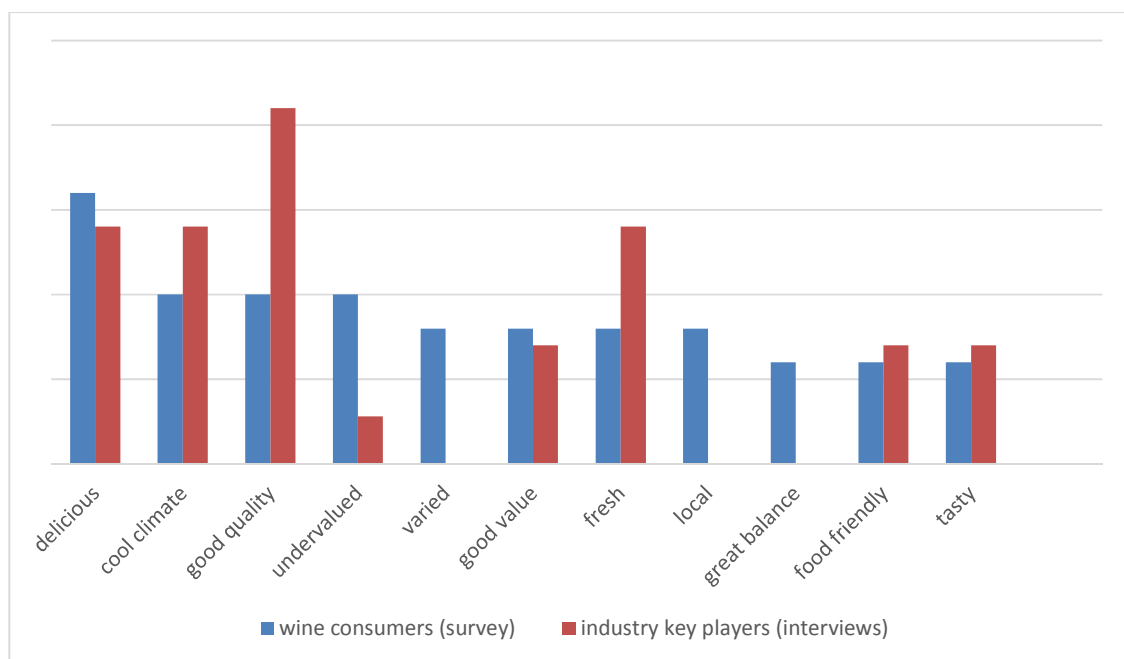


Chart 8. Words wine consumers and industry key players use to describe wines from Ontario

Wine consumers and key players in the Ontario wine industry were also asked what words they use to describe wine regions in Ontario. The top three attributes of key players in the Ontario wine industry (beautiful, unique and quality) are the same

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attributes in the top five of wine consumers. This result shows once again alignment

between image and identity regarding beauty of the wine regions in Ontario, as well as

uniqueness and quality. Both groups also shared *local* as another attribute when asked to

describe wine regions in Ontario.

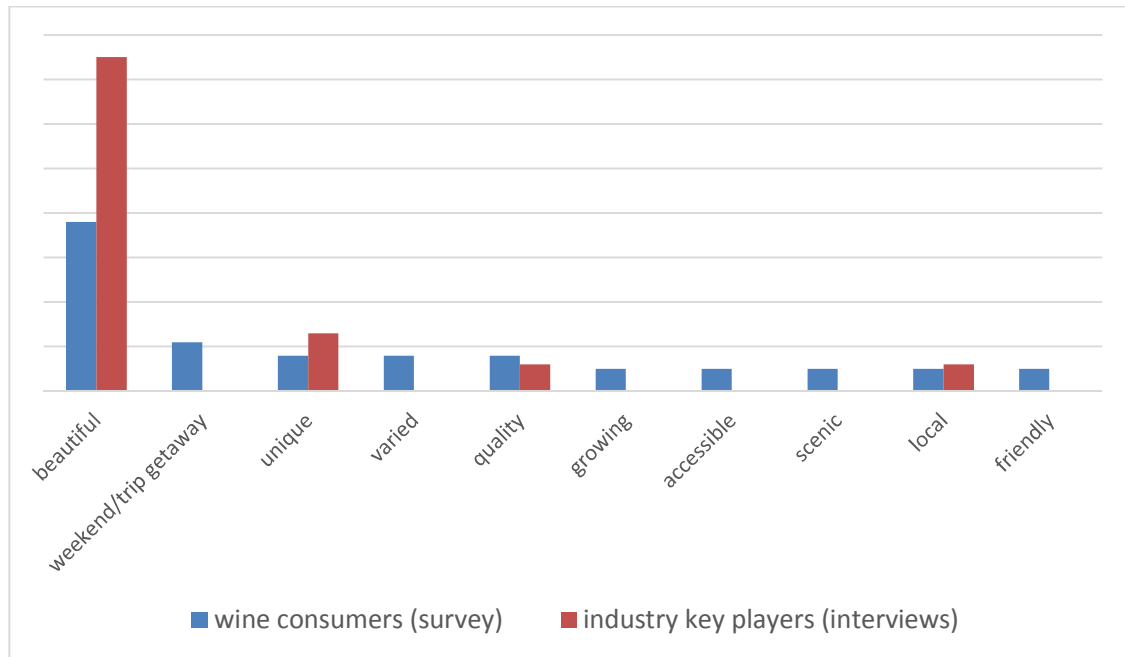


Chart 9. Words wine consumers and industry key players used to describe wine regions in Ontario

Therefore, results for RQ2 demonstrate organizational image and organizational identity are aligned with regards to wines from Ontario and wine regions in Ontario.

However, the gap observed comes from key players in the Ontario wine industry who showed skepticism and expressed negative opinions such as “... transmitting the idea that these quality products come from Ontario is a challenge...” Key players in the Ontario wine industry seem unaware that their perceptions are closely similar to those from wine consumers.

RQ3 examined what sources of information influence and contribute to building the reputation and brand awareness of wines from Ontario. Wine consumers were

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surveyed in order to identify what sources of information are used and contribute to Ontario wines' reputation.

Results from the content analysis of what was published the first three months of 2015 by two prominent wine critics in Toronto, Gord Stimmell from the *Toronto Star* and Beppi Crosariol from the *Globe and Mail*, demonstrate Ontario wines are not prominently featured in their wine reviews. Nonetheless, key players in the industry identified the wine reviews from Stimmell and Crosariol as important channels where wine consumers in Toronto get their information about wine. It demonstrates a gap where key players in the industry think wine from Ontario is featured to educate wine consumers in Toronto and where it actually is featured.

When asked where they get their information about wines, 38% of wine consumers indicated the LCBO, 17% identified wine critics and 13% rely on wine blogs. The 38% of wine consumers indicating the LCBO as their main source of information about wines shows the importance the LCBO plays in the education of wine consumers. Key players in the Ontario wine industry identified the LCBO has an important influencer where wine consumers in Toronto get their information about wine, followed by wine reviews. The content analysis of the LCBO website demonstrated it is playing a part in promoting Ontario wines on its website, although with a preference towards the Niagara region and not consistently using qualifiers when describing the wines.

However, 32% of wine consumers answered “other” to the question *Where do you go get information about wines?* and the most common answers then were word of mouth, own research, wineries and tasting events. A key player in the wine industry provided an interesting opinion with regards to where wine consumers get their information: “The young sommeliers and servers are very very important. They are in a tremendous position of power. When you're sitting down and you have a wine list in front

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of you and the server comes up and recommends an Ontario wine that says a lot to the consumer.”

Therefore, results for RQ3 validate the key role the LCBO plays as an educational tool for wine consumers and both wine consumers and key players in the Ontario wine industry are aware of this fact. Both groups also acknowledged the importance of word of mouth and wine critics. Thus results for RQ3 show alignment between wine consumers and key players in the industry regarding sources of information influencing and contributing to building the reputation and brand awareness of wines from Ontario.

Results of this research project show the importance of education through wine tourism or bringing wine tourism to consumers. It shows the importance of pushing wine tourism as the best method to gain consumers.

Recommendations for key players in the Ontario wine industry:

- Recommendation based on RQ1 results: Bring Ontario wines to consumers: approach sommeliers for endorsements on restaurant wine lists and develop partnerships with events in Toronto (i.e. Taste of Toronto).
- Recommendation based on RQ2 results: Concentrate efforts on winery experiences: use the positive attributes identified from the online survey results (which represent what wine consumers think)
- Recommendation based on RQ3 results: Focus on top source of information used by wine consumers (38% identified the LCBO and 17% mentioned wine critics).

LIMITATIONS

It seems like Ontario wine enthusiasts also enjoy wines from the Lake Erie North Shore wine region, a region that was not included in this research project. Perhaps having Ontario's third wine region as an option might have yielded different results.

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The generalization of this study is also limited as it involved only 60 respondents and it was not possible to clearly identify and confirm if respondents were indeed from Toronto. It is also not possible to identify the age of respondents since this was not a question included in the online survey. Had this piece of information been included, it could have yielded findings regarding differences between boomers and Millennials since information in the literature review section indicate Millennials represent an interesting group for the future of the Ontario wine industry.

FURTHER RESEARCH

Therefore, future surveys could replicate this study with a larger number of respondents in order to validate the findings. Perhaps conducting focus groups could produce more in-depth answers and conclusions.

Having a research project focus on Millennials would also be useful for the Ontario wine industry given members of this group of wine consumers are considered as trend setters. Furthermore, focus groups with Millennials could be beneficial since research tends to show they have an appreciation of Ontario wines

Finally, an interesting finding was that of the 16% of respondents who indicated in Question 1 not needing a specific reason for drinking and anytime was a good time for wine, half chose a wine from Canada as their first choice to Question 10. And of the 22% of respondents members of a wine club, 69% chose a wine from Canada as their first choice to Question 10. It seems to show a link between wine club members and preference for Ontario wines. The role played by wine clubs (if any) represents another interesting angle for future research.

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CONCLUSIONS

This project research explored the concepts of *organizational identity* and *organizational image* in the Ontario wine industry. Based on the research findings, the Ontario wine's industry organizational identity can be defined as *an industry with high quality products and beautiful wine regions*. The organizational image based on the research findings can be defined as *an industry with delicious products and beautiful wine regions*. These are the definitions for these two concepts in the Ontario wine industry based on the research and findings when using the top attribute participants and respondents used to describe wines from Ontario and wine regions in Ontario. Hence, alignment between image and identity was demonstrated.

Satisfaction drives customer behaviour (and eventually loyalty), which in turn drives financial performance. Thus, bringing consumers to wineries or bringing Ontario wines to consumers in Toronto will influence that customer behaviour key players in the industry aim to target to turn wine consumers into loyal customers and brand ambassadors. For instance, Australian wineries used wine tourism to provide opportunities to build brand loyalty because it enables wineries to meet their customers face-to-face and gives them an opportunity to raise the profile of their products in the customer's mind (Lockshin, n.d., p.5). Customers may then develop a long-term connection with a product that they have sampled at the place of its origin.

The overall results of this research project tend to show frequent experiences with wines will increase the possibility to choose wines from Canada based on the answers from the wine consumers in Toronto, thus confirming the positive effect of the winery experience factor. This research project also demonstrate that both groups (key players in industry and wine consumers) are aligned with regards to the importance of quality of the

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product, an intrinsic attribute. Consequently, having a winery experience and the quality of wine are the two main factors playing a role in building the reputation of Ontario wines.

KNOWLEDGE MOBILIZATION

Ultimately, the conclusions lead to a list of recommendations and best practices for the Ontario wine industry to build and enhance its brand and reputation domestically.

As a deliverable of this research project, the student investigator created an assessment tool designed to determine which wine consumers in Toronto represent the greatest potential to turn them into loyal consumers of wines from Ontario and brand ambassadors of the industry (see Appendix J).

Respondents in this research project, wine consumers in Toronto, showed no interest in how the wine is presented (labels and design) but are mainly interested by what is inside the bottle (taste, grape variety and country of origin). Thus wine tourism is key for the Ontario wine industry to get those consumers to wineries to taste the product and eventually become brand ambassadors.

Additional knowledge mobilization activities include a commitment to share these findings with broader audiences in the way of presentations at conferences geared toward the Ontario wine industry. A summary of the findings (see Appendix K) and an executive summary of this research project will be created for this purpose. The study will also be summarized in an article that will be submitted for consideration to journals of communications research, corporate reputation and wine research in Canada.

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APPENDIX A: Recruitment email for key players in the Ontario wine industry (interview participants)

*Subject: Interview for Masters' project: The Ontario Wine Country Reputation Story:
What is making wine consumers in Toronto buy or ignore wines from Ontario?*

Hello,

I am currently completing the Masters of Communications Management (MCM) at McMaster University and starting working on my capstone project (a sort of thesis but with a practical angle instead of theoretical).

My topic is on the Ontario wine industry, specifically what is making wine consumers in Toronto buy or ignore wines from Ontario. I will focus my project on reputation theories and explore which drivers are contributing factors to the reputation of Ontario wines:

- word of mouth (credibility)
- product quality
- consumer experience (emotional appeal)
- history
- other...

and how these reputation drivers affect the purchasing decision of wine consumers in Toronto.

I will be conducting individual in-depth telephone interviews with (*insert winery owners/ managers / Ontario wine industry representatives*) for my research. Would you be interested in talking to me for a 20 to 35-minute interview? Just let me know what day and time is convenient for you.

And of course, participants must be of legal drinking age in Ontario to be selected for this research project. Gender is not an important criterion.

Looking forward to hearing from you.

Sincerely,

Paula

Paula Bernardino
MCM Student #1253357
514 571-6296
bernarp@mcmaster.ca

EXPLORING THE REPUTATION OF THE ONTARIO WINE INDUSTRY

APPENDIX B: Recruitment advertisement on Twitter for key players in the Ontario wine industry (interview participants)

Tweet:

#MCM student looking to interview Ontario #winery owners or managers and industry reps for research project on Ontario #wines reputation.

(137 characters)

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APPENDIX C: Recruitment email to holders of potential interview participants' contact information

Subject: Participats for interview for Masters' project: The Ontario Wine Country Reputation Story: What is making wine consumers in Toronto buy or ignore wines from Ontario?

Hello,

I am currently completing the Masters of Communications Management (MCM) at McMaster University and starting working on my capstone project (a sort of thesis but with a practical angle instead of theoretical).

My topic is on the Ontario wine industry, specifically what is making wine consumers in Toronto buy or ignore wines from Ontario. I will focus my project on reputation theories and explore which drivers are contributing factors to the reputation of Ontario wines:

- word of mouth (credibility)
- product quality
- consumer experience (emotional appeal)
- history
- other...

and how these reputation drivers affect the purchasing decision of wine consumers in Toronto.

I will be conducting individual in-depth telephone interviews with winery owners/managers and/or Ontario wine industry representatives for my research. Do you have any ideas and/or suggestions of anyone I could contact? These interviews will take approximately 20 to 30 minutes.

Of course, participants must be of legal drinking age in Ontario to be selected for this research project. Gender is not an important criterion.

Looking forward to hearing from you.

Sincerely,

Paula Bernardino

Paula Bernardino
MCM Student #1253357
514 571-6296
bernarp@mcmaster.ca

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APPENDIX D: Interviews consent log

RESEARCHER'S LOG FOR RECORDING VERBAL CONSENT FROM INTERVIEW PARTICIPANTS

Participant's name	Participant's winery	Participant's title	Wine region	Date
Sherry Martin Karlo	Karlo Estates	Partner	PEC	Wednesday November 5
Norman Hardie	Norman Hardie Winery	Owner	PEC	Friday November 7
Jason Sharpe	Huff Estates	General Manager	PEC	Friday November 7
Michèle Bosc	Château des Charmes	Director of Marketing	NOTL	Friday November 14
Edward Madronich	Flat Rock Cellars	President	Niagara	Monday November 24
Stephen Gash	Malivoire	Managing Director	Niagara	Tuesday November 25
Dave Gillingham	Domaine Darius	Head Wine Maker	PEC	Tuesday November 25
Paul Speck	Pelham Estate	President	Niagara	Thursday November 27
Thomas Pennachetti	Cave Spring Cellars	Vice-President, Sales & Marketing	Niagara	Wednesday November 26
Daniel Lafleur	Tawse	National Sales Manager	Niagara	Tuesday December 2
Lynn Sullivan	Rosehall Run	Managing Partner	PEC	Friday December 12
Adine Fabiani	Andrew Peller Ltd.	National Marketing Director, VQA Wine	NOTL	Friday December 12
Krystina Roman	Rosewood Estates Winery	Sales & Marketing	Niagara	Thursday Dec 18
Barry Katzman	Mike Weir Wine Inc. Stoney Ridge Estate Winery	President	Niagara	Monday January 26
Bill Redelmeier	Southbrook Vineyards	Owner	NOTL	Tuesday January 27

EXPLORING THE REPUTATION OF THE ONTARIO WINE INDUSTRY

APPENDIX E: Recruitment email for wine consumers in Toronto (survey respondents)

Subject: Survey: The Ontario Wine Country Reputation Story: What is making wine consumers in Toronto buy or ignore wines from Ontario?

Hello,

I am currently completing the Masters of Communications Management (MCM) at McMaster University and am working on my capstone project (a sort of thesis but with a practical angle instead of theoretical).

My topic is on the Ontario wine industry, specifically what is making wine consumers in Toronto buy or ignore wines from Ontario. I will focus my project on reputation theories and explore which drivers are contributing factors to the reputation of Ontario wines:

- word of mouth (credibility)
- product quality
- consumer experience (emotional appeal)
- history
- other...

and how these reputation drivers affect the purchasing decision of wine consumers in Toronto.

I am looking for both participants who have and have not visited wineries in Ontario. Would you be interested in completing my survey? **Participants must be of legal drinking age in Ontario to complete this survey.** Gender is not an important criterion.

Let's begin! **Link to survey:** <https://fr.surveymonkey.com/s/T8MR3P3>

Shorten link: <http://svy.mk/1CTXOKr>

Sincerely,

Paula Bernardino
Paula Bernardino
MCM Student #1253357
514 571-6296
bernarp@mcmaster.ca

EXPLORING THE REPUTATION OF THE ONTARIO WINE INDUSTRY

APPENDIX F: Recruitment advertisement on Twitter for wine consumers in Toronto (survey respondents)

Tweet:

Looking for #wine consumers in Toronto to complete survey for Master's research project on Ontario #wines reputation. Must be 19

Link to survey: <https://fr.surveymonkey.com/s/T8MR3P3>

Shorten link: <http://svy.mk/1CTXOKr>

(139 characters)

EXPLORING THE REPUTATION OF THE ONTARIO WINE INDUSTRY

APPENDIX G: Media space of Ontario wines in traditional media in 2014

Article	Media outlet	Topic discussed	Tone
December 24	Canadian Forum	Where to buy wine	Neutral
December 10	Toronto Sun	Government policy: LCBO vs Beer Store	Negative
December 2	CWNS	Jane Staples' wine picks – G. Marquis Pinot noir	Positive
November 10	Canada NewsWire	Endorsement Niagara wines	Positive Positive
November 6	Toronto Star	Wine review – Peninsula Ridge Riesling	Positive
October 24	WineAlign	Modernizing the LCBO	Negative
October 24	National Post	LCBO offer (debate) Retail functioning	Negative Negative
September 26	WineAlign	Promotional event Wine review – Stoney	Positive Positive
September 20	National Post	Promotional event	Positive
September 17	Canada NewsWire	Promotional event	Positive
September 7	The Globe and Mail	Internal bickering VQA VQA system/designation	Negative Positive
September 5	St. Thomas Times	Government policy/issues	Negative
September 5	The Globe and Mail	Government policy	Negative
September 4	Pelham News	Government policy	Negative
August 23	The Globe and Mail	Government policy	Negative
August 23	The Canadian Press	Government policy	Negative
August 22	The Canadian Press	Government policy	Negative
August 22	Postmedia Breaking News	Government policy	Negative
August 21	Postmedia Breaking News	Promotional event	Positive
August 21	Toronto Star	Government policy	Negative
August 20	Postmedia Breaking News	Government policy	Negative
August 20	Toronto Star	Government policy	Negative
August 3	MacLean's	Ontario wine industry - weather	Negative
July 30	Canada Newswire	Government policy Ontario wine industry - sales	Neutral Neutral
July 25	Toronto Star	Government policy	Negative
July 7	The Globe and Mail	LCBO strategy	Neutral
June 24	Canada Newswire	Ontario wine country promotion – wine route	Positive
June 19	Canada Newswire	Ontario wine country promotion – wine truck	Positive
June 10	Canada Newswire	Ontario wine country promo – visa partnership	Positive
June 5	WineAlign	Government policy	Positive

EXPLORING THE REPUTATION OF THE ONTARIO WINE INDUSTRY

May 22	MacLean's	Ontario wine industry - presentation	Positive
May 22	MacLean's	Ontario wine industry - presentation	Positive
May 20	Postmedia Breaking News	Ontario wine country promotion – travel guide	Positive
May 16	Canada Newswire	Ontario wine country promotion – travel guide	Positive
May 2	Toronto Star	Ontario wines promotion – Farmer's market Government policy Distribution issues	Positive Positive Negative
April 29	Toronto Sun	Ontario wines promotion – Farmer's market Government policy	Positive Positive
April 28	Toronto Sun	Ontario wines promotion – Farmer's market Government policy	Positive Positive
April 28	WineAlign	Ontario wine featured	Positive
April 12	Toronto Star	Ontario ice wine international recognition	Positive
April 8	Today's Farmer	Government policy	Neutral
April 4	Toronto Star	Government policy	Negative
March 2	Toronto Sun	Ontario wine industry – structure	Positive
March 1	The Globe and Mail	Ontario wines featured	Positive
February 27	Toronto Star	Ontario wine featured	Negative
January 25	The Globe and Mail	Ontario wines promo – restaurant endorsement	Positive
January 15	M2 Presswire	Ontario wines promotion – Farmer's market Government policy	Positive Positive
January 15	Canada Newswire	Ontario wines promotion – Farmer's market Government policy	Positive Positive
<i>Total summary:</i>	47 articles		

EXPLORING THE REPUTATION OF THE ONTARIO WINE INDUSTRY

APPENDIX H: Interview discussion guide for key players in the Ontario wine industry

Thank you for accepting to participate in my research project.
Let's begin!

Participants' characteristics:

1. How long have you been involved in the wine industry?

Perceptions of Ontario wine country:

2. How do you feel about the following statement: Canada is not a country known and/or recognized for its wine.
3. The Ontario grape and the wine industry provide 6,900 jobs and contribute to \$529 million in economic value to the province of Ontario.
 - a) Do you think this information is promoted enough?
 - b) Do you think wine consumers in Toronto care about this information?

Perceptions of Ontario wines:

4. What words would you use to describe wines from Ontario?
5. What do you think is the perception wine consumers in Toronto have of wine from Ontario?
6. What words would you use to describe wines regions in Ontario?
7. What do you think is the perception wine consumers in Toronto have of wine regions in Ontario?

Knowledge of wine consumers' behaviour:

8. What factors should Ontario wines focus on to influence purchasing decision?
Price, country or origin, grape variety, name of wine, reputation, taste, bottle design, bottle shape, label design
9. Why do you think wine consumers in Toronto visit or do not visit wineries in Ontario?
10. Why do you think wine consumers in Toronto purchase or do not purchase a bottle of wine from Ontario
11. Where do you think wine consumers in Toronto go to get information about wines? LCBO? Wine blogs?
12. Do you see an increase in sales after winery tours/visits/tastings/event?
13. How important is wine tourism for your strategy?

* Do you have any additional comments you would like to make before we end this interview?

Thank you very much for your participation!

EXPLORING THE REPUTATION OF THE ONTARIO WINE INDUSTRY

APPENDIX I: Online survey for wine consumers in Toronto

I am currently completing the Masters of Communications Management (MCM) at McMaster University and am working on my capstone project (a sort of thesis but with a practical angle instead of theoretical).

My topic is on the Ontario wine industry, specifically what is making wine consumers in Toronto buy or ignore wines from Ontario. I will focus my project on reputation theories and explore which drivers are contributing factors to the reputation of Ontario wines:

- word of mouth (credibility)
- product quality
- consumer experience (emotional appeal)
- history
- other...

and how these reputation drivers affect the purchasing decision of wine consumers in Toronto.

Thank you all for accepting to participate in this research project by completing this short survey. Participants must be of legal drinking age in Ontario to complete this survey. Gender is not an important criterion. I am looking for both participants who have and have not visited wineries in Ontario.

Let's begin!

1. What are the occasions when you might enjoy drinking wine? _____

2. Which type of wine do you prefer?

- Red
- White
- Rosé

3. Are you member of a wine club?

- Yes
- No

If yes, which one? _____

4. Indicate the 3 biggest wine regions in Ontario: _____

5. What is the total number of wineries in Ontario? _____

6. Indicate the name of a winery in Ontario: _____

7. How do you feel about the following statement: Canada is not a country known and/or recognized for its wine.

- I agree with the statement
- I do not agree with the statement
- I have no opinion

8. Did you know Ontario grape and the wine industry provides 6,900 jobs and contributes to \$529 million in economic value to the province of Ontario?

- Yes I did
- No I did not

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9. Are you surprised by the numbers in the previous question?

- Yes
- No

10. You walk into your regular wine store and there is one bottle from different countries. Considering the price is exactly the same, which you would pick first, second, third, fourth, fifth and last.

- Italy
- France
- Chile
- Australia
- Canada
- California

11. What factors are important when you are purchasing wine? 1 = most important and 9 = least important.

- Price
- Country or origin
- Grape variety
- Name of wine
- Reputation
- Taste
- Bottle design
- Bottle shape
- Label design

12. Have you ever visited a winery?

- Yes
- No

If yes, which one? _____

13. Have you ever visited a winery in Ontario?

- Yes
- No

If yes, which one? If no, why not? _____

14. Where do you go get information about wines?

- LCBO
- Wine blogs
- Wine critics

Other: please specify _____

15. What words would you use to describe wines from Ontario? _____

16. What words would you use to describe wines regions in Ontario? _____

17. What word comes to mind when you think about Prince Edward County? _____

18. What word comes to mind when you think about Niagara-on-the-Lake? _____

19. What word comes to mind when you think about the Niagara Peninsula? _____

20. Please share an experience you have had with a wine from Ontario. Feel free to indicate you do not have an experience with a wine from Ontario to share. _____

21. Do you have any additional comments? _____

End

EXPLORING THE REPUTATION OF THE ONTARIO WINE INDUSTRY

APPENDIX J: Turning wine consumers into brand ambassadors

As a deliverable of this research project, an assessment tool was designed to determine which wine consumers in Toronto represent the greatest potential to turn them into loyal consumers of wines from Ontario and brand ambassadors of the industry. Wine tourism is key for the Ontario wine industry to get those consumers to wineries to taste the product and eventually turn them into brand ambassadors.

Recommendations for key players in the Ontario wine industry:

- Recommendation based on RQ1 results: Bring Ontario wines to consumers: approach sommeliers for endorsements on restaurant wine lists and develop partnerships with events in Toronto (i.e. Taste of Toronto)
 - Develop a postcard to be distributed at each event or restaurant serving wine from Ontario and encourage wine consumers to take the quiz. Answers from these wine consumers will provide a quick overview of how wines are being promoted by sommeliers and how wine consumers are reacting.
 - Quiz will assess:
 - Reaction from consumers when suggested a wine from Ontario
 - Reaction when taste the wine
 - Will consumer likely search for this wine at LCBO or go to winery
 - Postcard ends with invitation for wine consumers to follow the winery of the wine tasted on its social media platforms
 - Winery welcomes “new fan” and belongs conversation/relationship
- Recommendation based on RQ2 results: Concentrate efforts on winery experiences: use the positive attributes yielded from the online survey results (representing what wine consumers think)
 - Develop a postcard to be distributed at the end of a winery visit and encourage wine consumers to take the quiz. Answers from these wine consumers will provide a quick overview of what visitors appreciate more when visiting the winery and/or wine region in order to identify possible competitive advantage.
 - Quiz will assess:
 - what should be done to attract more visitors and leverage the visits of consumers at wineries and turn them into brand ambassadors
 - reasons why wine consumers visit a specific winery and/or wine region:
 - Desire to support local
 - Accessibility to wineries
 - Possibility to sample wines before buying them
 - Educational aspect: gain insight about pairings from staff
 - Exceptional customer service
 - Postcard ends with invitation for wine consumers to follow the winery visited on its social media platforms
 - Winery welcomes “new fan” and belongs conversation/relationship

EXPLORING THE REPUTATION OF THE ONTARIO WINE INDUSTRY

- Recommendation based on RQ3 results: Focus on top source of information used by wine consumers (38% identified the LCBO and 17% mentioned wine critics). Start with wine tasting events at LCBOs in Toronto.
 - Develop a postcard to be distributed at each wine tasting event and encourage wine consumers to take the quiz. Answers from these wine consumers will provide a quick overview of how wines are being promoted by LCBO product consultants and how wine consumers are reacting.
 - Quiz will assess:
 - Reaction from consumers when suggested a wine from Ontario
 - Reaction when taste the wine
 - Will consumer likely search for this wine at LCBO or go to winery
 - Postcard ends with invitation for wine consumers to follow the winery of the wine tasted on its social media platforms
 - Winery welcomes “new fan” and belongs conversation/relationship

EXPLORING THE REPUTATION OF THE ONTARIO WINE INDUSTRY

APPENDIX K: Presentation handout: summary of findings

Exploring the Reputation of the Ontario Wine Industry

What is making wine consumers in Toronto buy or ignore wines from Ontario?

Prepared by: Paula Bernardino Advisor: Dr. Laurence B. Mussio
MCM 740: Major Research Project / Capstone Presentation, *tbd*, 2015
Masters of Communication Management Program
Department of Communication Studies and Multimedia, McMaster University

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Abstract

This research project investigates what is making wine consumers in Toronto buy or ignore wines from Ontario. The concepts of *organizational identity*: the features of the company that appear to be central and enduring to internal publics, the internal public in this case being the winery owners, was explored and compared to *organizational image*: the perception held by customers, in this case wine consumers. The comparison helped determine the *corporate reputation*: what is actually known by both internal and external stakeholders, which can be positive or negative.

This research project involved in-depth telephone interviews with 15 winery owners and other winery staff members from the Niagara Peninsula and Prince Edward County wine regions. Toronto wine consumers were also solicited to complete a short online survey.

Based on the research findings, the Ontario wine's industry organizational identity can be defined as *an industry with high quality products and beautiful wine regions*. The organizational image based on the research findings can be defined as *an industry with delicious products and beautiful wine regions*. The overall results of this research project tend to show frequent experiences with wines will increase the possibility to choose wines from Canada based on the answers from the wine consumers in Toronto, thus confirming the positive effect of the winery experience factor. This research project also demonstrate that both groups (key players in industry and wine consumers) are aligned with regards to the importance of quality of the product, an intrinsic attribute. Consequently, having a winery experience and the quality of wine are the two main factors playing a role in building the reputation of Ontario wines.

Finally, this research project delivers the base for a loyalty program. An assessment tool was created designed to determine which wine consumers in Toronto represent the greatest potential of loyal consumers of wines from Ontario and build brand ambassadors out of winery visitors.

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About the Author

Paula Bernardino has more than 12 years of experience with a solid expertise in strategic corporate communications and public relations acquired while working for large corporations and not-for-profit organizations. She is currently Regional Communications and Corporate Responsibility Partner for RSA where she is responsible to maintain communications consistency across regions and increase internal and external awareness regarding the company's commitment to corporate responsibility.