A STUDY INTO ONTARIO'S QUEST FOR GLOBAL FINE WINE RECOGNITION

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1. Summary

Ontario is an emerging wine region globally renowned for Icewine. Significant recent efforts have been made to develop an international reputation for premium, cool climate table and sparkling wines. This study examines how far Ontario has come, since 2010, in crafting a unique regional identity, and how well this narrative has been understood by key international opinion formers.

Research consisted of a ten-year quantitative analysis of VQA Ontario production and sales data, a 2009 and 2018–2022 Canadian export plan comparison, and a series of interviews with Ontario wineries, trade, and influential UK and USA-based opinion formers. These elements were used to form four strengths, weaknesses, opportunities, and threats (SWOT) analyses, exploring key identity attributes derived from territorial branding and wine regionality studies.

The paper concludes by suggesting areas of improvement for strengthening regional identity, including clarifying Ontario's cool climate argument, developing its distinctive taste profile, increasing domestic and international educational efforts, working towards gradual specialization, addressing quality variability concerns, and improving the framework for exports.

2. Introduction

2.1 Focus and Purpose of the Research

The 2018–2022 Canadian Vintners Association (CVA) Long-Term International Trade Strategy is centred around an ambitious long-term vision: “Canada is globally recognized as one of the world’s finest producers of premium cool climate wines” (Canadian Vintners Association, 2017).

Over 70% of Canadian wine is produced in Ontario (Grape Growers of Ontario, 2017) and 78% of wine exports by value hail from the province (Wine Growers Canada, 2020a). Cool climate and high quality are central communication themes of the Wine Marketing Association of Ontario (WMAO).

Over the past decade, the Ontario wine industry has made significant efforts to increase international exposure for its table and sparkling wines. A 2010 media/trade tasting in London has since become an annual event spawning tastings in Hong Kong, New York, and Chicago. The 2011 creation of a yearly festival, the International Cool Climate Chardonnay Celebration (i4C), has drawn wineries and influential wine media from around the globe.

As a result, accolades and favourable press mentions are increasing (Kaiser 2020, pers comm.). However, articles still regularly suggest that Ontario’s self-proclaimed premium, cool climate identity remains obscure:

“Ontario’s genres and varieties…defy easy categorization,” (Jefford, 2018)

“Many think Ontario is simply too cold for making fine wine…” (Asimov, 2018)

“Ontario might not be so cool after all…” (Harding, 2019)

This hypothesis prompted the author to explore the strength and legitimacy of Ontario’s regional identity, via the following research questions:

1. Over the past ten years (2010–2019), how far has Ontario come in terms of crafting a unique, regional identity?
2. How well recognized is Ontario’s wine identity in key, international markets?
3. What areas of improvement can be suggested to strengthen Ontario’s global identity?

2.2 History of the Ontario Wine Industry

Ontario’s first commercial vineyards were planted in the early to mid-1800s with Vitis labrusca and American hybrid grape varieties (Warren, 2018). A winery sales exemption granted during the 1916 Ontario Temperance Act led to a surge in production of poor-quality, sweet, high alcohol red wine. Upon the repeal of prohibition in 1927, the Liquor Control Board of Ontario (LCBO) was established to regulate the distribution and sale of alcohol (Aspler, 1993).

Labrusca-based wines continued to dominate production well into the 1980s. Their decline came with the introduction/amendment of free trade agreements[1] in the late 1980s, which eradicated import tariffs leading to an influx of competitively priced, Vitis vinifera wines from California and Europe (Phillips, 2017).

To enhance wine quality the Ontario government sponsored mass uprootings of labrusca and replanting with vinifera varieties (Phillips, 2017). Ontario wineries formed the Vintners Quality Alliance (VQA), which later became a provincial body regulating quality, origin, grape, and vintage (VQA Ontario, 2020a). VQA wines are made from 100% Ontario-grown vinifera or approved French hybrid varieties.

To compensate for winery production shortages while newly planted vinifera vines matured, the government allowed 70%[2] imported wine to be blended with domestic wine (Phillips, 2017). These wines still exist today, labelled as: International blends from domestic and imported wines; commonly referred to as International Domestic Blends (IDB).

Ontario wineries began producing Icewine[3] in the early 1980s. In 1991, Inniskillin 1989 Vidal Icewine from Niagara, Ontario won the Grand Prix d'Honneur at VinExpo

[1] The Canada-United States Free Trade Agreement was introduced, and the General Agreement on Tariffs and Trade amended.

[2] As of 2014, 75% imported wine is permitted in IDB wines (Wine Content and Labelling Act, 2000)

[3] Icewine, capitalized and spelled as one word, is a registered trademark in Canada

(Inniskillin, 2020). Icewine is still considered by many worldwide to be Canada's signature wine style.

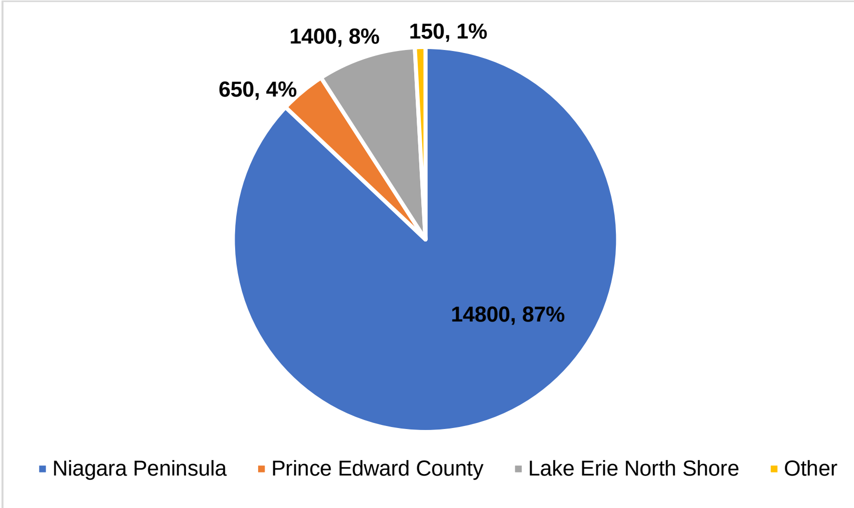
2.3 Current Situation

17,000 acres (6,880 hectares) of vineyards are planted across Southern Ontario. Figure 1 shows the three primary viticultural areas.

Figure 1: Ontario Viticultural Areas (Wines of Canada, 2020)

Figure 2 highlights the importance of the Niagara Peninsula.

Figure 2: Total Vineyard Acreage 2015 (Grape Growers of Ontario, 2018)



IDB wine production and sales far outweigh VQA[4]. Indeed, VQA accounts for just 46% of the grape crop and 25% of Ontario provincial wine sales (WGAO, 2018). However, given its focus on crafting regional identity, this paper will focus exclusively on VQA.

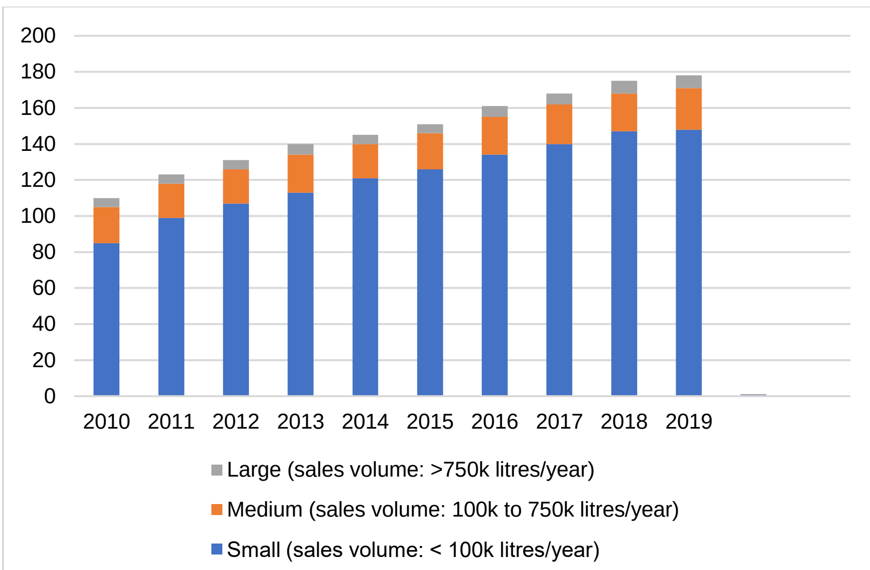
Ontario's wine growing regions are situated between 41° and 44°N. They are continental in climate, with cold winters and warm summers moderated by their proximity to two Great Lakes. Glacial activity through the ages has resulted in diverse soils, with a high concentration of limestone from ancient sedimentation (Wine Country Ontario, 2019a).

[4] VQA refers to 100% Ontario-grown grape wines from Vitis vinifera and/or approved French hybrid varieties

VQA Ontario has a formal appellation system consisting of three viticultural areas (refer Figure 1). In 2005, the Niagara Peninsula was sub-divided into two regional appellations and ten sub-appellations. In 2015, Lake Erie North Shore (LENS) also acquired a sub-appellation, the South Islands (VQA Ontario, 2020b).

From just 17 wineries at its inception, VQA now counts 178 registered wineries. Figure 3 shows the steady rise since 2010 and the dominance of small producers.

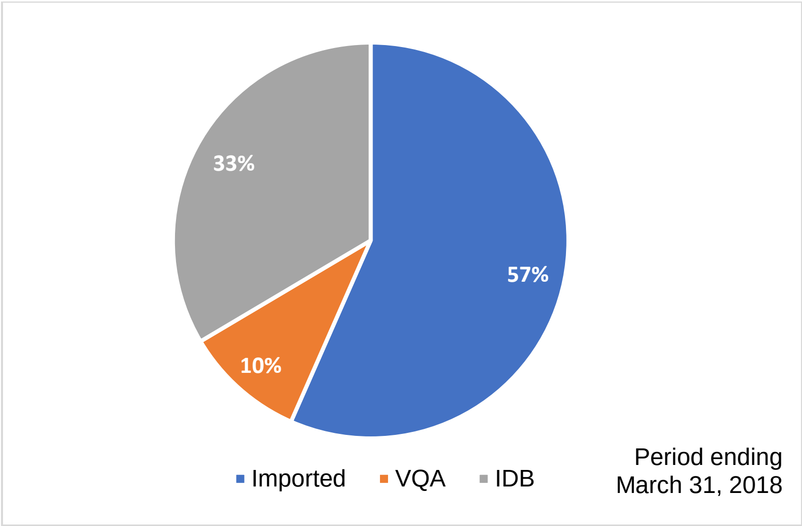
Figure 3: Number of Registered VQA Ontario Wineries (VQA Ontario, 2010–2019)



Over 90% of annual VQA production is of still table wine. Small volumes of sparkling wine, Icewine and late harvest wines make up the rest (VQA Ontario, 2019).

Limited access to viable retail markets and poor gross margins are significant obstacles for Ontario wineries (Deloitte and VQA Ontario, 2019. Figure 4 (below) shows the dominance of imported and IDB wines sold in Ontario. The LCBO maintains a near total wine distribution and retailing monopoly[5]. High land and labour costs coupled with low yields result in premium prices[6] for much of the Ontario VQA wine category. Furthermore, a single LCBO mark-up structure for imported and domestic wines, which includes built-in import costs, eliminates any retail price advantage for Ontario wines.

Figure 4: Marketshare of Wines Sold in Ontario by Volume (LCBO, 2018)



Direct sales options to on-premise licensees and via on-site/on-line winery stores are subject to a 6.1% government tax, on top of standard provincial sales taxes, limiting profitability in this sector. 2018-surveyed Ontario wineries indicated that international exports accounted for 0.5% to 8.7% of total sales[7] (Deloitte and VQA Ontario, 2019).

[5] A grocery channel is emerging. At present, approximately 150 grocery stores are licensed to sell wine. They purchase wholesale via the LCBO.

[6] Premium price is defined as: over 15 USD (Wine Intelligence, 2019)

[7] Export share was broken down by winery size, based on total annual sales figures (Deloitte and VQA Ontario, 2019)

Nevertheless, recent enthusiastic articles in such publications as Wine Spectator (Sanderson, 2020), JancisRobinson.com (Harding, 2019), The New York Times (Wooley, 2019) and Decanter (Jefford, 2018), as well as major accolades like the 2018 Decanter Platinum Best in Show award for Thirty Bench's Small Lot Cabernet Franc, have brought increased visibility to the region. As host to the 2021 International Cool Climate Wine Symposium (ICCWS)[8] awareness for Ontario's wine industry will continue to rise.

[8] This event was scheduled for summer 2020 but pushed back to 2021 due to COVID-19

3. Literature Review

3.1 Territorial Brands, Wine Regionality and Value Creation

A considerable body of literature exists on identity creation for wine regions, and the potential for increased renown and perceived value if well executed.

One such set of studies examines the concept of territorial brands. Charters and Mitchell define a territorial brand as a group of proprietary brands inextricably linked by origin. A Central Otago case study concludes that a shared story, cohesion of actors, and a willingness to prioritize the territorial brand are crucial to its success (Charters and Mitchell, 2011). Additional research highlighted the necessity for an effective brand manager (Charters et al., 2011).

Wine regionality - a region’s reputation for producing a specific wine style - is the focus of a 2011 Australian study. Key drivers outlined included the need to specialize, to produce wines reflective of their origin, offering a distinctive taste and consistent high-quality; all of which are discussed by opinion formers (Easingwood et al., 2011).

Christensen et al. (2015) agree that regional identity must be validated by key external intermediaries such as wine critics. They also indicate that a robust, legitimized identity is an important means of adding value to a region’s wines.

Exploiting a regional brand can be precarious, notably when the region is little known or carries negative pre-existing impressions (Cayla and Eckhardt, 2007). Thus, it is critical that all actors within the region convey a clear narrative which can be understood locally and internationally (Dart, 2017).

The above studies pointed this researcher toward four identity themes to explore with both internal players and external gatekeepers:

1. Uniqueness of Character (specialized, distinctive, terroir-specific)
2. Consistent, High-quality
3. A Shared Vision (single narrative on heritage, strategy, future ambitions)
4. Desire to Work Collectively (effective brand manager)

3.2 Existing Research on Ontario Wine Regional Identity

Topics related to Ontario's regional identity were analysed in several recent studies. Barbe et al. (2016) found that "differentiation through specialization is the best strategy to develop the Niagara wine region" and suggested a focus on Riesling.

Two studies tackled the question of legitimacy. A 2013 paper analyzed how the adoption of common viticultural, winemaking and marketing practices increased Ontario's credibility as a premium wine region (Voronov et al., 2013). Charest (2009) explored how authenticity was created over time in Niagara, resulting in both homogenized winemaking traditions and distinctive, site-specific characteristics.

A 2017 study investigated how Ontario’s small, cool climate wineries can create a following by emphasizing provenance, critical acclaim, and hedonism (Massa et al., 2017). A Prince Edward County (PEC) case study from 2014 advised a terroir-focused wine identity to drive local economic development (Holland et al., 2014).

While each of these papers explores aspects of identity formation in Ontario wine regions, no holistic analysis into the strength of Ontario’s narrative exists. Furthermore, none address the issue of identity validation by external opinion formers.

4. Research Methodology

Quantitative and qualitative research methods were employed to provide objective, measurable data and explore personal beliefs, thus allowing for a comprehensive analysis.

4.1 VQA Ontario Ten-Year Quantitative Analysis

Production and sales figures for VQA Ontario wines, collated by the LCBO and by VQA Ontario, were analysed annually over a ten-year period (VQA Ontario, 2010–2019; LCBO, 2020a). Ontario Icewine export statistics provided by Wine Growers Canada (WGC)[9] were also evaluated. The objective was to determine how VQA Ontario has evolved over the past decade in terms of style, cultivar significance and exports.

4.2 Canadian Wine Export Strategy Ten-Year Evolution

The 2009 Canadian wine export strategy was compared with the current 2018–2022 plan to gain insights on their international positioning strategies, objectives, and evolution over time[10]. These findings were then measured against Ontario export data and yearly export objectives formulated by the WMAO, which were verbally communicated to the author (Kaiser 2020, pers comm.).

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[9] The Canadian Vintners Association was renamed Wine Growers Canada (WGC) in 2020

[10] The 2009 plan was devised by Foreign Affairs and International Trade Canada (now Global Affairs Canada), in conjunction with a National Export Working Group of Canada's largest exporting wineries and regional industry associations (Susan O'Dell & Associates, 2009). The 2018–2022 plan was written by Canada's national wine advocacy group, WGC, in consultation with its member wineries and regional industry associations (Canadian Vintners Association, 2017).

4.3 Interviews

37 semi-structured interviews were conducted with Ontario wineries, Ontario trade and international opinion formers (Table 1). This research method allowed for the collection of both factual and opinion-based data.

Table 1: Sample Population, Semi-structured Interviews.

17 Ontario wineries
1 Ontario wine marketing association representative
1 Canadian government representative
3 Ontario wine writers
3 Ontario wine sales professionals
3 United Kingdom (UK) wine writers
3 UK wine sales professionals
3 United States of America (USA) wine writers
3 USA wine sales professionals

The goal of Ontario interviews was to determine the strength and cohesiveness of the region's identity narrative. The international interviews served to ascertain how well understood Ontario's identity message is to leading opinion formers.

Most Ontario interviews were conducted in person during two field trips to the Niagara region and Toronto. Remaining Ontario interviews and all international interviews were conducted over the telephone or via email.

Four questionnaires were used: 1) for wineries and local media; 2) for local sales professionals; 3) for international media; 4) for international sales professionals (see Appendix 8.3). In all cases, structured questions were asked to establish common themes. Interviewees were then encouraged to speak freely to allow greater depth of response.

Due to the contentious nature of certain opinions shared, anonymity was employed. Table 2 shows how interviewees were categorized. Full details of all interviewees are given in Appendix 8.4.

Table 2: Category Codes for Interviewees

Code	**Descriptor**
OW 1-17	Ontario Wineries
OT 1-8	Ontario Trade (marketing association, government, media, sales)
IM 1-6	International Media (wine writers)
IS 1-6	International Sales (sommeliers, retailers, importers, distributors)

<u>Ontario Interviews</u>

Winery interviewees were selected to reflect a representative cross-section of current VQA winery numbers, appellations, and production. Over 80% of VQA Ontario wineries are small[11] (see Figure 3). Therefore, ten out of 17 interviews were conducted with small wineries. To reflect their larger production share despite lower numbers, five medium-sized and two large wineries were included.

The Niagara Peninsula produces the majority of VQA Ontario wine. LENS and PEC each account for roughly 1% of production (VQA Ontario, 2019). Interviews were carried

[11] Defined by VQA Ontario as selling less than 100,000 litres of wine per year (VQA Ontario, 2019)

out with 14 Niagara producers of all sizes, one medium-sized producer of LENS and Niagara wines, and two small PEC producers.

The author was careful to include a wide sample of producers: those focused solely on domestic sales, as well as those exporting, newly established wineries, and long-standing ones. Wineries contributing to collective efforts or garnering global visibility were also targeted.

Three Ontario-based wine writers, each possessing longstanding familiarity with the region's wines, and wide local readership were interviewed, as were three sales professionals, including a Master Sommelier, an LCBO buyer, and a wine agency owner. These industry experts were included to provide a critical counterbalance to the potentially more biased winery respondents.

Important contextual information, industry data and identity narrative was obtained from multiple interviews with the WMAO and Global Affairs Canada.

<u>International Interviews</u>

In the 2009 and 2018–2022 Canadian export plans, the USA and UK were identified as the main target markets for generating international awareness due to their "high levels of trade…and global media influencers" (Canadian Vintners Association, 2017).

Three USA and three UK wine writers for leading, global wine publications and/or national newspapers were interviewed, as were three USA and three UK sales professionals all selling/having sold Ontario wines. Sales respondents included: fine-dining sommeliers, retail wine buyers, and sales and marketing directors for national import and distribution firms.

The author selected interviewees who have visited Ontario wine country and/or attended trade tastings as they were felt to be best positioned to comment on the region's efforts to convey regional identity.

Interview Analysis

All interviews were recorded, transcribed, and then colour coded into the four identity themes identified in the literature review. A master grid was formulated to consolidate data. Findings were weighted according to the number of interviewee mentions.

4.4 SWOT Analysis

The consolidated interview data was used to formulate SWOT analyses for each of the four themes. When relevant, the quantitative data and/or export plan comparison was used to support or refute findings. These analyses served to answer the research questions.

4.5 Limitations

The author met with considerable challenges in data collection. Despite repeated requests, Ontario's grapevine acreage data was not divulged by the Grape Growers of Ontario (GGO), with no explanation given. The author was therefore unable to analyze the evolution of grape variety plantings or dedicated VQA acreage.

Canadian bottled export sales data, published by WGC, is collected from producer export declarations[12] to the Canadian Border Services Agency. Export sales value is based on Free on Board (FOB) prices. Annual figures correspond to calendar years. In contrast, VQA Ontario export sales data, collected by the LCBO[13], is based on the Ontario retail value of wines. Figures correspond to an April 1st to March 31st fiscal year. The use of different reporting metrics at national and provincial levels render comparative analysis challenging.

Several sources (OW1, OT7, OT8) mentioned potential producer reporting errors in both WGC and VQA figures, placing the integrity of these figures in doubt. Neither the WGC nor the VQA was able to specify when/where errors might have occurred.

VQA Ontario export data is only collected for total volume and value. There are currently no tools in place to analyze export evolution and trends per variety or wine

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[12] The B13A export declaration form

[13] Wineries are obligated to submit a monthly J10 reporting form to the LCBO detailing the total volume and retail value of sales through all channels, including exports.

type. WGC has export statistics specific to Icewine, by province. However, these Ontario figures were markedly different to estimates provided by the WMAO, likely due to reporting issues mentioned above.

Qualitative research carries inherent limitations notably concerning the potential for researcher and/or participant bias affecting results (Bell and Waters, 2018). To reduce these concerns, interview questions were vetted by an experienced qualitative researcher: Maxim Voronov, Professor of Organization Studies at York University.

5. Findings and Analysis

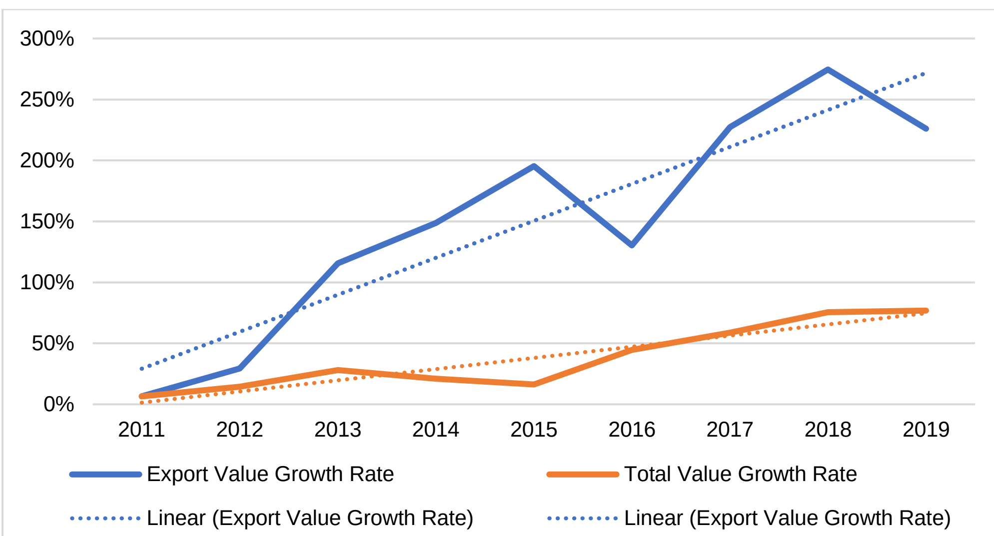
5.1 VQA Ontario Ten-Year Quantitative Analysis

Overall VQA Sales and Export Sales Growth

According to the LCBO (2020a), 153,711 9L cases of VQA wines were exported in 2019. This equates to just over 6% of total production, as compared to 4% in 2010. Despite modest growth, exports remain a minor sales channel for Ontario wines.

VQA export value shows an encouraging growth trend however, having more than tripled since 2010[14]; significantly outpacing total value growth (see Figure 5)[15].

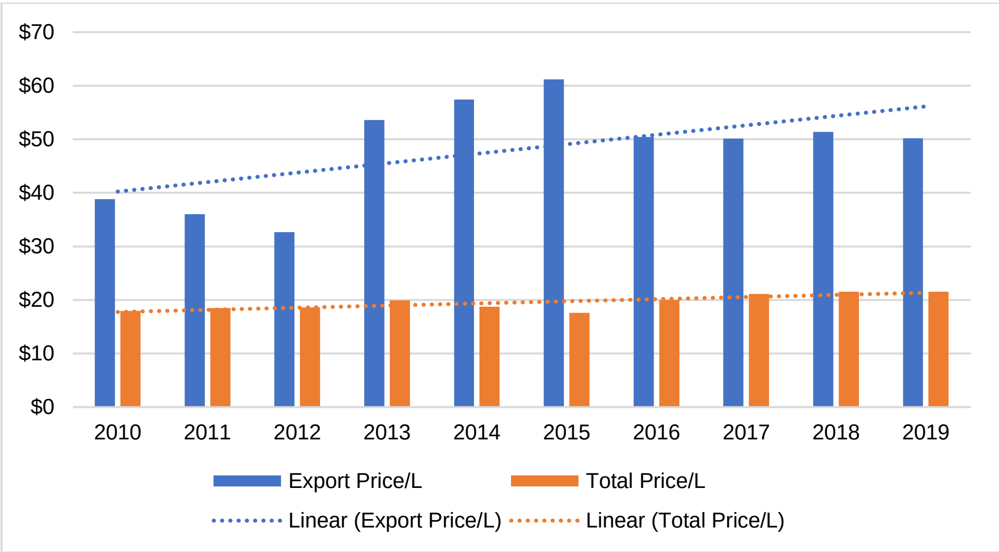
Figure 5: Growth of VQA Export vs. Total Value 2011–2019
(VQA Ontario, 2010–2019; LCBO, 2020a)



[14] Data set starts with the 2010 export and total sales values therefore growth trends are calculated as of 2011
[15] It should be noted that, as this figure is calculated based on the Ontario retail value of goods, it is not representative of actual generated export revenue.

The considerably higher average price of export wines vs. total, displayed in Figure 6, can be explained by a more expensive export product mix heavily reliant on Icewine. It also supports a premium wine export focus, expressed by winery interviewees.

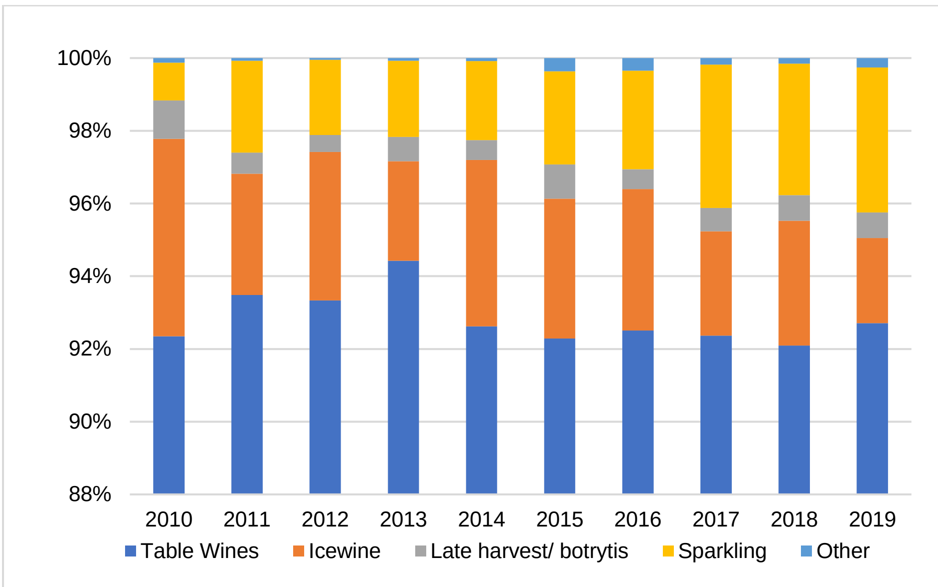
Figure 6: Export vs. Total VQA Price/L: 2010-2019
(VQA Ontario, 2010–2019; LCBO, 2020a)



VQA Production by Wine Style[16]

Figure 7 shows table wines steady at 92–94% of overall Ontario wine production since 2010. Icewine, a product highly dependent on vintage conditions, is more volatile, but shows signs of ceding ground to sparkling wine which has grown from 1% to 4% over the past decade.

Figure 7: Annual Volume Production by Wine Style (VQA Ontario, 2010–2019)



VQA Table Wine Focus

In 2019, 49 different varieties were used in VQA wines. The varietal mix is highly fragmented, with ten grapes making up 90% of production volume (see Table 3 below). Chardonnay, Riesling, Cabernet Franc and Merlot remain the four most significant varieties since 2010 (VQA Ontario, 2010–2019).

[16] Production figures are compiled on a fiscal basis ending March 31 of the year following harvest, based on VQA approvals. They are calculated using volumes declared at the time of submission (VQA Ontario, 2019).

Table 3: Top Ten VQA Wine Varieties, 2019 (VQA Ontario, 2019)

Grape Variety	**% of Total Production Volume 2019**
Chardonnay	13.3%
Riesling	13.1%
Cabernet Franc	11.1%
Merlot	10.4%
Pinot Gris	8.0%
Cabernet Sauvignon	7.8%
Vidal Blanc	7.6%
Pinot Noir	6.5%
Baco Noir	6.2%
Sauvignon Blanc	5.1%

Ontario's focus on varietally-labelled wines is evident from Figure 8 and 9 (below). Since 2011[17], 94–96% of white and 88–89% of red table wine produced has been of wines with a single[18] or multiple varieties indicated on the front label[19]. Marked volume fluctuations across all varieties, displayed by these figures, can be explained by highly variable climate conditions.

[17] 2010 data is not available

[18] A minimum of 85% of the variety is required in single variety labelled wines (VQA, 2020c)

[19] Consumer-facing label

Figure 8: VQA White Table Wines vol./L (VQA Ontario, 2010–2019)

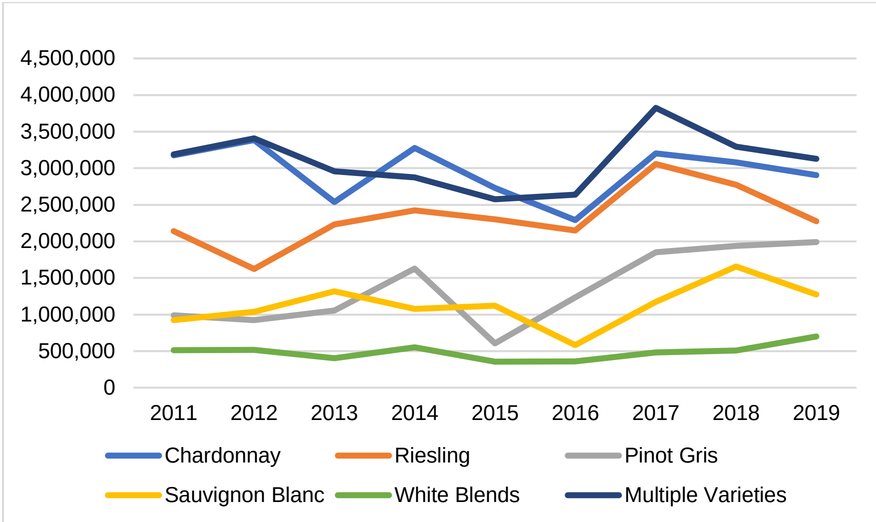
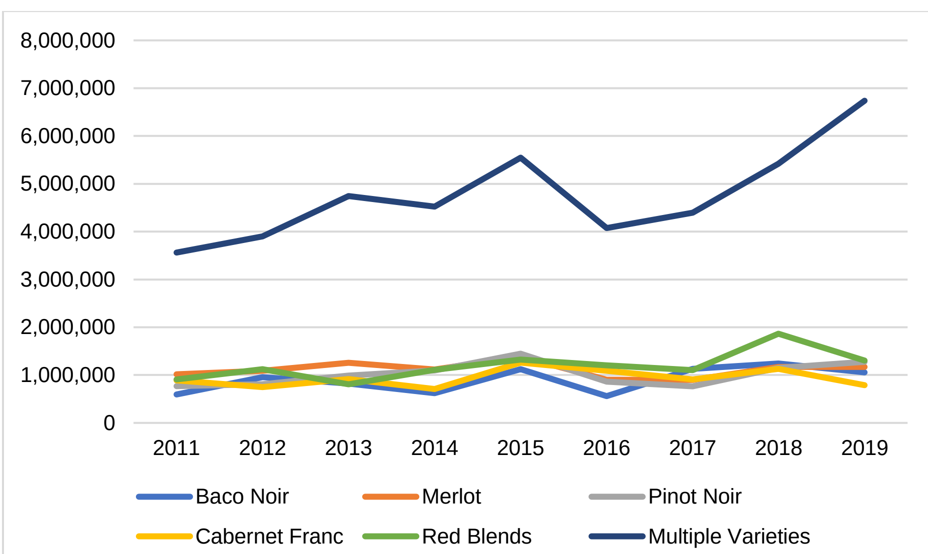


Figure 8 shows a trend of multiple variety-labelled white wines regularly outweighing top single variety, Chardonnay, suggesting that no clearly dominant white grape has emerged in Ontario. Production for variety leaders Chardonnay and Riesling is largely flat across the past nine years. Pinot Gris has grown significantly since 2015, overtaking Sauvignon Blanc.

Figure 9: VQA Red Table Wines vol./L (VQA Ontario, 2010–2019)



Multiple variety-labelled red wines, notably Cabernet-Merlot, are far more prevalent than single variety bottlings and show significant growth since 2011 (see Figure 9 above).

Figure 10: Top 4 Single Variety Labelled Reds vol./L (VQA Ontario, 2010–2019)

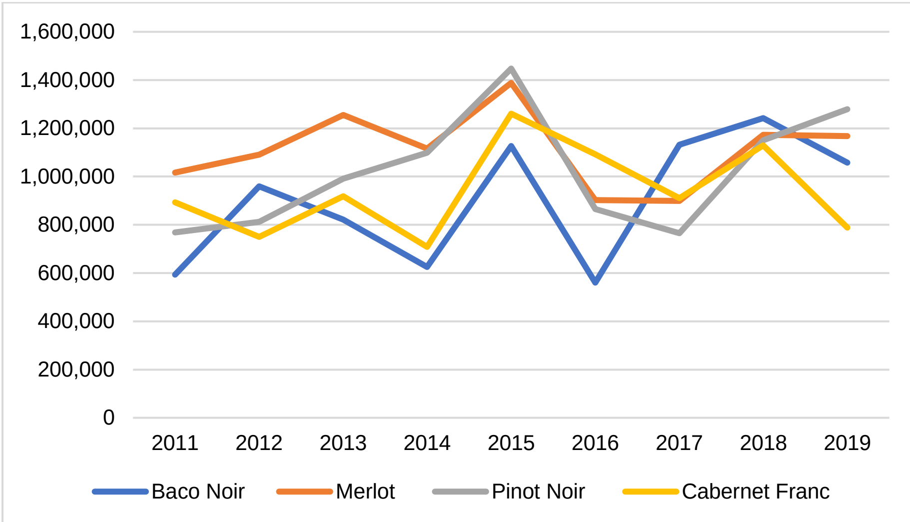


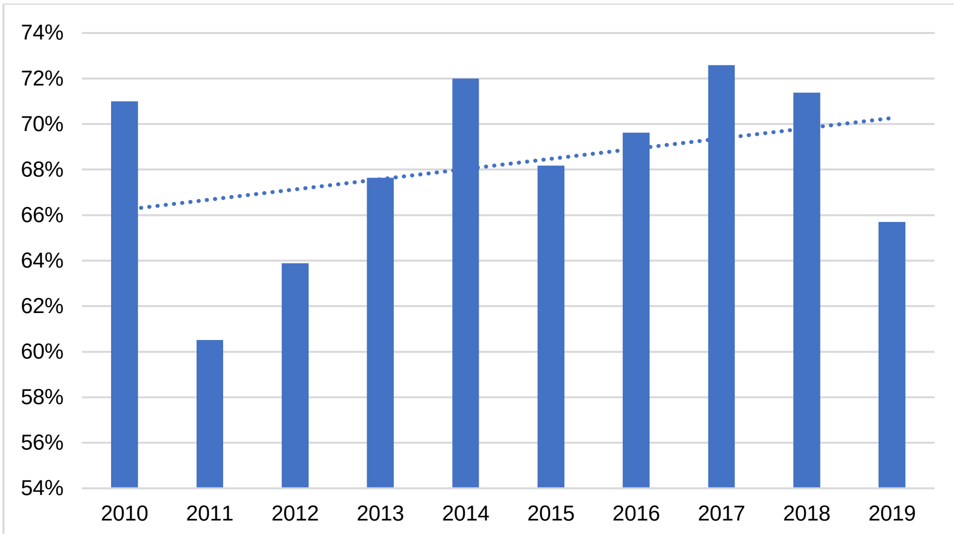
Figure 10 examines top single variety reds and shows that while Baco Noir and Pinot Noir display the highest overall nine-year increases, no predominant red variety exists. Cabernet Franc, popular in Cabernet-Merlot wines and as a red Icewine variety, has seen only modest overall growth in single variety bottlings.

<u>Icewine</u>

The WMAO estimates that Icewine accounts for a roughly stable 50% share of total Ontario exports by value since 2010 (Kaiser 2020, pers comm.). This assessment was supported by major Icewine exporter: winery OW1.

However, WGC figures indicate that Icewine holds a two-thirds share of total Ontario export value with a ten-year increasing trend (see Figure 11).[20]

Figure 11: Icewine Share of Total Ontario Exports By Value: 2010 – 2019 (Wine Growers Canada, 2020b)[21]



5.2 Canadian Wine Export Strategy Ten-Year Evolution

Reasons for Export

WGC estimates that 100% Canadian-grown wine represents 0.3% of global wine production (Canadian Vintners Association, 2018). Despite low production levels, domestic retail challenges make channel diversification a top cited export incentive in

[20] The disparity between VQA Ontario and WGC figures is explained in this paper's Research Methodology Limitations section.

[21] Diminished global interest for Icewine has been observed in many export countries (OW7, OW12, OT8). A lesser 2019 Icewine export share is also due to decreased Chinese sales stemming from strained Canadian-Chinese diplomatic relations (Davidson, 2019)

both the 2009 and 2018–2022 plans (Susan O'Dell & Associates, 2009; Canadian Vintners Association, 2017).

Generating international media recognition to boost domestic brand equity is another major driver in both strategies, and a key objective of the WMAO's international activities (Wine Marketing Association of Ontario, 2020).

Poor local wine quality perception by domestic consumers was mentioned by 40% of Ontario interviewees. The LCBO's Ontario category manager suggested that lingering associations with historic low quality continue to impede local acceptance (Pothier 2020, pers comm.). Winery OW17 explained that confusion with IDB wines is also an issue, as consumers think "our wine is fake; that it's not really Ontario wine" (OW17).

Vision Statements and Positioning Strategies

Export vision statements since 2009 convey a desire for global recognition as a high-quality winemaking country. Cool climate is a key identity component in both strategies, and a central theme across the WMAO's promotional materials, notably via its consumer-facing brand: Wine Country Ontario.

Capitalizing on Icewine's premium global reputation is the main positioning strategy of both the 2009 and 2018–2022 plans. The WMAO offers a slightly nuanced strategy, promoting five core table wine varieties alongside Icewine.

The 2009 strategy also suggests leveraging Canada's country image, described as "clean, extreme, great place to visit" (Susan O'Dell & Associates, 2009, p. 22). Canada's "excellent global reputation" is acknowledged in the 2018 plan though is not part of its strategy (Canadian Vintners Association, 2017, p. 4). Instead, it advises taking advantage of rising global interest for wines from non-traditional producing regions. In line with this trend, the WMAO launched a "Tastes Untamed" advertising campaign in 2016 (see Figure 12) to position VQA Ontario wines as "new and next", appealing to an adventurous, non-conformist consumer-base (Singh, 2016).

Figure 12: Tastes Untamed Advertising Campaign Creative (Wine Country Ontario and VQA Ontario, 2019)

Quantitative Goals

The 2009 export strategy proposes a series of measurable goals (listed below). Numbers-based objectives were not included in the WGC's 2018–2022 plan due to disparate regional and winery goals (Hingorani, 2020). Sales data from WGC and VQA Ontario, along WMAO and Global Affairs' discussions were used to evaluate progress:

2009 Goals (Susan O'Dell & Associates, 2009)	**2019 Reality**
Double national export sales *(no base value/timeline given)*	Value of national exports: $32M in 2019 (+50% since 2010) (Wine Growers Canada, 2020a)
Maintain Icewine sales value of $58.73/L	2018 VQA Ontario Icewine sales/litre: $44 to $80.34 depending on winery size; estimated average of $60.65/L (Deloitte and VQA Ontario, 2019)
Increase national export spending from $250-300K annually to $1.2M *(equivalent to 6% of 2007 export value)*	Current estimated yearly spend: $400K (Dorozynski 2020, pers comm.).

The national total amount spent on export initiatives each year is "difficult to know for certain," explains Janet Dorozynski, Global Affairs Canada. "There is no national envelope, nor a national organization that manages export activities". Dorozynski works closely with each region and has observed a moderate increase in overall spending since 2009 (Dorozynski 2020, pers comm.).

The WMAO has been funded by various Ontario government ministries since its creation in 2015, with additional monies from VQA Ontario and Global Affairs Canada[22]. More substantial federal financing for eligible export activities requires matched dollar-for-dollar spending, limiting its accessibility. While provincial funding includes export provisions, “most of our budget goes towards marketing to Ontarians,” explained Kaiser, as this is where the biggest sales opportunities lie (Kaiser 2020, pers comm.).

Qualitative Goals

Both the 2009 and 2018–2022 plans focus on enhancing global gatekeepers’ understanding of Canadian wine by bringing key tastemakers to Canada, and in-market activities such as trade tastings. Since 2015, the WMAO has organized regular wine country visits with buyers, sommeliers and wine writers from Shanghai, Hong Kong, across the UK and the USA. As mentioned in the Introduction, international trade tastings in cities like London and New York now occur yearly.

Participating in trade fairs, notably ProWein, was prioritized more heavily in the 2018–2022 plan vs. 2009. This corresponds with growing interest from Canadian producers: “Ten years ago, there were two of us. Now, there are close to 35 wineries” (OW1). Federal funding covers up to 50% of producer travel expenses. Booth fees for a common Wines of Canada pavilion are also subsidized (OW1).

[22] Global Affairs Canada provides funding for specific export initiatives and links to in-kind support from overseas embassies.

Ambitions for the Wines of Canada name have varied since 2009. At present, it exists as an umbrella message for collective efforts between regional associations. There is no dedicated management or budget. (Kaiser 2020, pers comm.). This absence of centralized coordination and its implications are discussed in Section 5.3.4.

5.3 Regional Identity SWOT

Four SWOT analyses were performed on the interview data, based on research themes identified in the literature review:

1. Uniqueness of Character
2. Consistent, High-quality
3. A Shared Vision
4. Desire to Work Collectively

Findings from the quantitative analysis and export plan comparison were also included when applicable, to support or refute interview data.

5.3.1 Uniqueness of Character

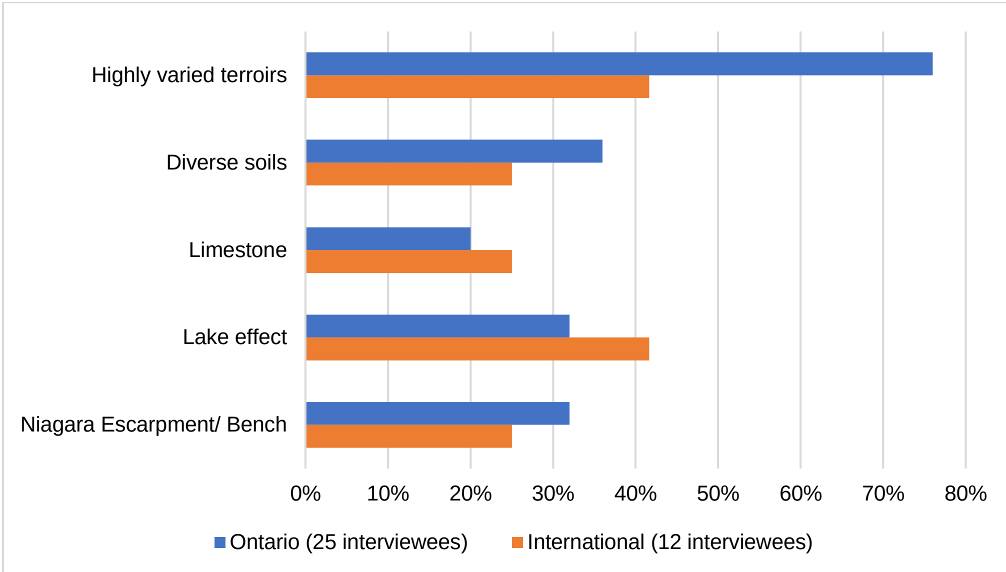
Strengths	Weaknesses
• Unique geography • Development of “mid-Atlantic” style	• Divided opinions on specialization • Positioning & quality issues with core varieties
Opportunities	**Threats**
• Production of trending wine styles	• Cool climate scepticism

Strengths

Unique Geography

Ontario’s unique geography was mentioned by 75% of international respondents. Four felt that Ontario’s singular winegrowing landscape was among its strongest assets. “The unique location of the escarpment and its position to the lake is one of those very self-contained pieces of geography that defines great wine regions” (IM2). “They really need to get behind the terroir…the type of limestone in Ontario is older than the limestone in Burgundy.” (IS2).

Figure 13: Aspects of Ontario's Geography Mentioned by Interviewees



Terroir diversity across appellations, giving distinct flavour profiles, was a major theme for Ontario interviewees (Figure 13). In contrast, no geographical aspects elicited majority mentions from international informants suggesting the lack of a uniform approach to educating tastemakers in these areas.

As a premium-priced emerging region with fine wine ambitions, legitimizing terroir is integral to Ontario's success. It is also a significant challenge given how heavily solicited opinion formers are by wine regions around the world making similar claims.

64% of local interviewees cited VQA Ontario's appellation system in this regard. "It means that we have thought about what might do well where and why" said OW2. While some wine experts agree that appellations are a "sign of quality", showing a "terroir-focused approach” (IM6), others feel that they can add unnecessary complexity to emerging wine regions (Goode, 2015).

Having chosen to classify terroir in this way Ontario must now work on growing recognition. Only three international interviewees displayed awareness of the region’s appellations, though each spoke positively of their qualitative potential.

Development of a “Mid-Atlantic” Style

When asked what distinguishes Ontario wines, 60% of interviewees (15 Ontario and seven international respondents) evoked a distinct “mid-Atlantic” (OW15) style, “halfway between Burgundy and California” (OW13). Others described it as the ability to “preserve stony minerality and high acidity, while achieving ripe fruit flavours” (OW3) and “natural textural abundance” (OW4). Three international informants noted the consumer appeal of this style: “there is an identity, sitting between New World and Old World that is always a good compromise for our guests” (IS5).

However, over half of Ontario wineries and five international interviewees compared wines stylistically to Burgundy, thus undermining the potential for mid-Atlantic distinctiveness. While comparisons with established benchmarks are typical for emerging wine regions, they hint at a lingering need to prove worth, in opposition with the WMAO’s campaign to position VQA Ontario as new and next; trendsetting rather than following.

Weaknesses

<u>Divided Opinions on Specialization</u>

Two thirds of VQA sales revenues come from on-site winery stores and the LCBO (VQA Ontario, 2019). Dependency on these channels was a regularly cited reason for the region's diverse grape variety mix, as wineries, "try to be all things to all people" (OW9). 56% of Ontario informants expressed the need to narrow focus to enhance quality: "you can't understand terroir when a 40-acre parcel is planted with 40 varieties" (OW15).

However, when asked whether a flagship grape or style would benefit the region Ontario respondents[23] were divided: 48% in favour and 52% against. Arguments for included the potential to "build the reputation of the region" (OW6) and "demand more what the wine is worth" (OW5). Arguments against centred around grape diversity as insurance against Ontario's variable climate, and difficulties in finding consensus. Three wineries felt that the diverse terroirs call for different grapes best suited to each site.

Signature grapes/wine styles can create a central focus for wine identity but can also leave regions vulnerable to changing consumer preferences. LCBO buyer Aaron Pothier (2020, pers comm.) detailed the boom and bust of Malbec's popularity in Ontario, stating that now consumers "won't even go in that section". In Ontario's diversely

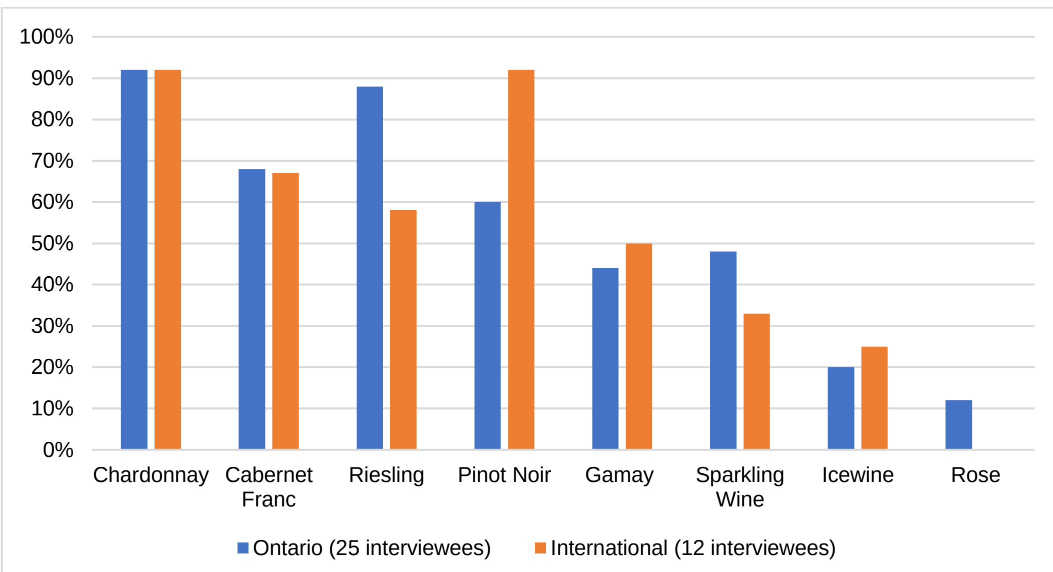
[23] International opinion formers were not asked about whether Ontario should have a flagship. Informal, pre-interviews with several in this interviewee category showed that they did not consider themselves sufficiently well-informed to comment on the subject.

planted vineyards, specializing would necessitate mass transitioning to the chosen variety(ies); a costly process few growers would embrace without financial incentive.

Positioning and Quality Issues with Core Varieties

In lieu of a flagship approach, the WMAO promotes five core varieties: Chardonnay, Riesling, Cabernet Franc, Pinot Noir and Gamay, and three styles: Icewine, sparkling wine and rosé (Kaiser 2020, pers comm.). While this remains a broad offering, it provides an overarching theme of cool climate varieties/styles.

Figure 14: Ontario's Greatest Variety & Style Strengths According to Interviewees



Interviewees' top-cited Ontario variety/style strengths were consistent with the WMAO's strategy (see Figure 14), suggesting that the region has effectively built this message. However, only Chardonnay and Cabernet Franc had unanimous appeal to both Ontario and international respondents.

Chardonnay drew the greatest overall support, notably for its high quality across Ontario's varied terroirs. Four Ontario interviewees felt that their cool climate Chardonnay style could set the region apart. Though international informants praised its "finesse" (IM1), "grace and subtlety" (IM4), none deemed it distinctive. Chardonnay is the second most cultivated white wine grape world-wide (OIV, 2017). In ten years, the i4C has showcased 38 different cool climate Chardonnay regions (i4C, 2020). Chardonnay is clearly a strong qualitative choice for Ontario, but it is unlikely to prove the best vehicle for demonstrating distinctiveness.

Conversely, Cabernet Franc could fill that role. Few regions focus on the grape as a single variety. Steady growth in world-wide plantings since 1990[24] and in recent American direct-to-consumer shipments[25] demonstrate its growing popularity. Cabernet Franc is the most produced red VQA variety (refer Table 3). It was endorsed by over two-thirds of both local and international respondents for its high-quality, climate/terroir suitability and stylistic range (from still to sparkling to Icewine). At present, however, production of Cabernet-Merlot labelled wines far outweigh single variety bottlings (see Figure 9). This, plus the production volatility of the latter (shown in Figure 10) suggests that an Ontario Cabernet Franc focus has yet to be achieved.

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[24] Cabernet Franc rose from 32nd to 17th most planted variety from 1990 to 2010 (Anderson, 2011)

[25] USA Direct-to-consumer shipments rose by 14% value and volume in 2019, outpacing growth from red category leaders: Cabernet Sauvignon, Pinot Noir & Red Blends (Sovos ShipCompliant, 2020)

Most Ontario respondents deemed Riesling a strength, yet 40% indicated low commercial popularity with winemakers not “taking it seriously, because they can’t get enough money for it” (OT3). Riesling was less popular than Chardonnay among international interviewees; an unsurprising result given the focus i4C affords Chardonnay. While Riesling is globally notorious for being “a tough sell” (Atkin, 2019), it is one of Ontario’s most produced varieties (see Table 3) thus efforts to boost customer engagement are necessary. A recent “big movement towards lower alcohol options” has been observed at the LCBO (Pothier 2020, pers comm.) suggesting that this could be an angle worth exploring. Indeed, Forrest Wines’ premium-priced 9–9.5% alcohol The Doctor brand has gained significant global distribution.[26]

All but one international interviewee endorsed Pinot Noir, yet several felt Ontario’s potential is not yet realized. Ten Ontario respondents mentioned variable quality linked to climate challenges, or to producers not “putting in the work” (OW15). Pinot Noir is a challenging grape, susceptible to spring frosts and fungal infections (Robinson et al., 2012). Like Chardonnay, Pinot Noir is widely planted with significant competition in the premium category. Most respondents felt that Ontario possesses sites capable of producing high-quality Pinot Noir. However, more wide-spread investment in areas like yield reduction and sorting is necessary to make this ambition a reality.

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[26] The Doctors' Riesling: LCBO: 19.95 CAD, Spec’s Wines (USA): 15.99 USD, Laithwaite’s Wine People (Australia): 25.00 AUD

Despite mentions of high quality and international acclaim, interviewees overwhelmingly saw Icewine as too challenging to build a future on, given declining global sweet wine consumption[27]. However, the WMAO indicated that, “there's still global interest, you can use it to draw people in and teach them about Ontario” (Kaiser 2020, pers comm.). While it may not be a growth area for sales, Icewine still has a useful, niche role to play. It fits the cool climate narrative, demonstrates high quality, and sets Ontario apart as the only major Icewine producer able to consistently produce an annual crop (Wine Country Ontario, 2019b).

Opportunities

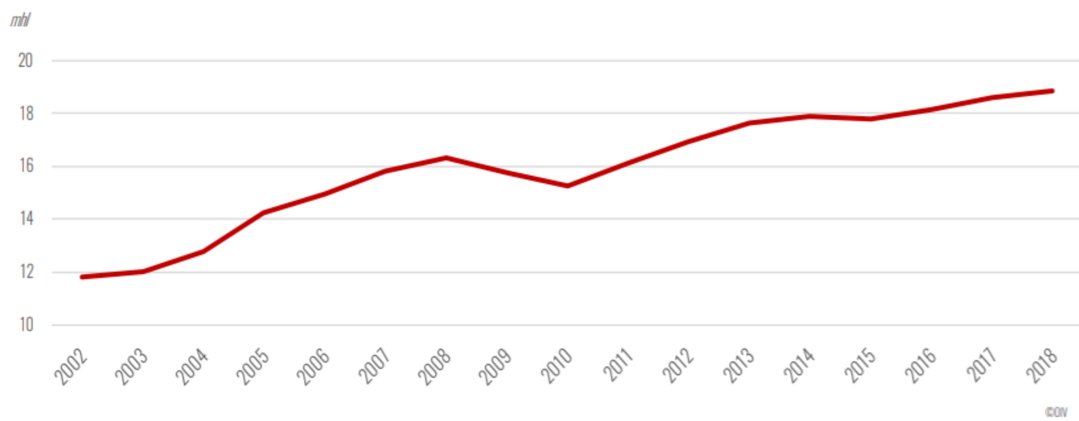
Production of Trending Wine Styles

Gamay and sparkling wine were mentioned as secondary grape strengths, however many felt they could drive excitement for Ontario. Enthusiasm for Gamay centred on its style (bright, pure, fresh) and attractive price positioning[28] (IS2, IM5). Traditional method sparkling wine drew similar reactions domestically and internationally. High quality and climate suitability were top stated arguments.

[27] Ontario Icewine export value has declined by 22% since 2018, after steady year-on-year increases from 2010 – 2018 (Wine Growers Canada, 2020b)

[28] The LCBO’s most expensive Gamay listing: Tawse Redfoot Vineyard Gamay Noir 2016 retails for 24.95 CAD (vs. Cloudsley Cellars Glen Elgin Pinot Noir 2015 at 50 CAD, Vineland Estate Reserve Cabernet Franc: 50 CAD)

Figure 15: OIV World Consumption of Sparkling Wines (OIV, 2020)



Sparkling wine shows long-term, world-wide growth in consumption (Figure 15). Canada has seen 8% average annual sparkling wine consumption growth from 2008–2018 (OIV, 2020) indicating strong domestic interest in the category. With careful price targeting and increased promotional efforts, Ontario sparkling wine could help boost domestic consumer perception.

Gamay's rising popularity in the USA is detailed in multiple articles (Cole, 2019; Asimov, 2017; Bonné, 2017). Wine writer IM2 confirmed a robust New York market trend for Gamay and light-bodied Cabernet Franc, suggesting that Ontario could gain a foothold as "in New York it would be considered local wine" (IM2). Ontario's increased focus on these varieties - indicated by rising Gamay plantings (OW3, OW15) and a transition to "more elegant, less extracted" Cabernet Franc (OW13) - should prove a successful strategy for wineries with a sound, market-adapted export plan.

Threats

Cool Climate Scepticism

Cool climate is core to Canadian export plans, WMAO promotional materials and the i4C festival. Ontario also possesses a dedicated cool climate research facility: Brock University's Cool Climate Oenology and Viticulture Institute (CCOVI). 84% of Ontario respondents deemed the region cool climate.

Furthermore, Ontario wine descriptors given by interviewees fit a cool climate taste profile (see Figure 16). International respondent IM1 claimed: "Two sensory features define Ontario wines: finesse and subtlety."

Figure 16: Commonly Mentioned Ontario Wine Taste Descriptors

However, four of six international wine writers disputed Ontario's cool climate claim, calling it "a challenge to accept" (IM2) and "…not what I think of as a typical cool climate" (IM6). According to IM5, "it's actually a short, warm climate with a cold beginning and end…I think it's a slight confusion in the marketplace."

The lack of a formal definition and generous use of the term (Chukan Brown, 2017) makes opinion formers' scepticism understandable. Furthermore, Niagara and LENS both regularly exceed 1500 growing degree days[29] (GDD) (Shaw, 2016); a level far superior to "classic cool climate wine regions" according to Jones and Schulz (2016). However, CCOVI climate expert Dr. Anthony Shaw (2020, pers comm.) warns that GDD is an "imperfect metric" for Ontario due to its significant temperature variations across seasons, across appellations, and between mid-summer and the shoulder seasons.

If left to persist, the misgivings of international opinion formers risk diminishing recognition of Ontario as an emerging cool climate player - a category linked with lighter-bodied, fresher wines seeing rising popularity according to American industry expert Chukan Brown (2017) and Christie's New York Wine Department Head, Chris Munro (Burgess, 2019).

[29] Winkler Index

5.3.2 Consistent, High-quality

Strengths	Weaknesses
• High quality & rising ambition	• Quality variability issues
Opportunities	**Threats**
• Transforming negative domestic perception • Building a reputation as a knowledge centre	• Expensive price positioning for an emerging region

Strengths

High Quality and Rising Ambition

Nine of 12 international respondents spoke favourably of Ontario's wine quality. Several felt quality was "extremely high across the board" (IM1). Others linked praise for "phenomenal" (IM2) or "brilliant" (IM3) wines to specific producers. These endorsements legitimize the high-quality claims made by all but three Ontario respondents.

16 local respondents linked high quality to a ten-year rise in confidence and ambition: "We have a certain assuredness now" (OW15); "everyone is aiming higher" (OW6). Since 2009, Niagara's bench land wineries have held annual blind tastings to critique each other's wines, "all with the purpose of raising the bar" (OW13). In 2011, six producers formed the 'Somewhereness' group to jointly market their wines, based on a shared ideology for small lots of terroir-focused, sustainably produced wines (Somewhereness, 2020).

While exclusive groups like these can cause jealousy and conflict in winemaking communities, they also create an aspirational environment. Somewhereness now counts 13 wineries, with one member (OW9) suggesting the group aims to represent 10% of the industry. Somewhereness tastings draw wide local media coverage according to OT1. This visibility for a fine wine, terroir approach is vital in changing domestic consumer opinions. Indeed, four of six local trade respondents felt that "groups like Somewhereness have done a lot for the industry" (OT4) in this regard.

Weaknesses

Quality Variability Issues

Despite a majority view of high quality, 30% of all media and trade respondents expressed concerns about variability. One international respondent felt: "The best wines are great, however there are a high proportion of disappointing wines" (IS6). Two others lamented the quantity of "competent" (IM2) or "sound, boring wines" (IM3).

While even the most revered wine regions produce lesser bottlings, they also possess an established reputation for excellence. As an emerging region attempting to compete in fine wine circles, Ontario is naturally held to higher scrutiny by tastemakers.

For this reason, wines for the producer-organized 2010 London tasting were pre-screened to present a uniform, high-quality level. The WMAO attempted to maintain this process for future tastings but was met with winery complaints (OT8). "There is government money being used now. If someone wants to pour their wines, they have to say yes" (OW9). This is a stumbling block for many government-funded wine organizations, allowing regions to develop reputations for inconsistent wine quality.

Independent, quality-focused groups like Somewhereness provide a useful qualitative counterbalance here. While lacking the budget for wider promotional efforts at present (OW13), scaling their operation via new membership and/or soliciting federal matched funding could allow for international outreach, potentially partnering with similar such organizations from other countries to elicit stronger media interest.

Opportunities

Transforming Negative Domestic Perception

Recent USA consumer behaviour research indicates that COVID-19 has generated a buying local trend that "many anticipate will continue in the long-term" (Accenture, 2020, p. 13). Wine Intelligence (2020, p. 12) predicts "a renewed focus on domestic and local wine in wine producing countries".

VQA sales in Ontario have grown 17% by volume year-to-date[30], despite closed tasting rooms and a 51% drop in on-premise volumes (LCBO, 2020b). While it is difficult to predict how such an unprecedented situation will play out over the long-term, the

[30] Figures cover all LCBO wholesale channels (LCBO stores, grocery, licensees) year-to-date: January 1 – May 31, 2020 (LCBO, 2020b)

current upswing provides opportunities for wineries to shift negative consumer perception and build local pride.

Growing domestic popularity would also prove useful in attracting increased private investment into the sector. Six Ontario respondents spoke of a mid-1990s to mid-2000s wave of mainly Canadian, outside investors drawn to the industry by passion and belief in the region's qualitative potential (OW5). Several suggested that investments of this scale have since diminished. Renewed investment, notably channeled into marketing outreach and exports, would have a significant impact in increasing renown.

Building a Reputation as a Knowledge Centre

Developing an international reputation as a "knowledge centre…where producers share information and experts gather" was explored in one regional identity study (Christensen et al., 2015. p. 87). Almost two-thirds of Ontario respondents evoked the calibre of their educational and research institutions, notably CCOVI, for producing talented winemakers and legitimizing the region. "There are very few bonafide academic research institutes in the world. We have one of them right here" (OW11).

CCOVI has been active in the global academic wine community since 1996, with international research partnerships, affiliated institutes, and regularly published cool climate studies (Brock University, 2019). However, only one international interviewee mentioned CCOVI, potentially indicating low mainstream media/trade awareness. As host to the ICCWS in 2021, Brock University has a significant opportunity to demonstrate CCOVI’s niche expertise in cool climate wine research to a wider audience[31].

Threats

Expensive Price Positioning for an Emerging Region

Seven of 12 international respondents expressed reservations over Ontario’s price positioning. Several likened prices to Burgundy levels which are “better known and consumers feel safer with them” (IS4). Another informant explained that the “lack of entry-level wines means that these wines are restricted to a very small number of our customers” (IS6).

Overly premium pricing puts Ontario at risk of losing ground to other emerging wine regions able to offer comparable quality at more attractive prices. However, Ontario’s low yields, high land, and labour costs preclude entry-level positioning. “We are inherently not able to compete on high volume, low price” explained OW17.

All international trade respondents agreed that Ontario wine requires handselling. This limits its suitability to premium on-premise and specialty retailers and requires regular relationship management to remain top-of-mind with gatekeepers. To encourage spontaneous trial in these venues, exporting producers will need to invest in market-adapted prices to offer a more affordable, lower premium[32] tier.

[31] The ICCWS 2016 in Brighton, UK drew “over 500 international delegates” (Furer, 2016)

[32] Lower premium is defined as: 20–30 USD

5.3.3 A Shared Vision

Strengths	Weaknesses
• Cohesive heritage story	• Low exports limiting global media coverage • Tactical export approach
Opportunities	**Threats**
• Compelling brand story	• Industry-wide reporting issues undermine credibility

Strengths

<u>Cohesive Heritage Story</u>

Interviewed wineries gave a clear, unified account of the region's history. The licensing of Inniskillin, uprooting of labrusca, creation of VQA and establishment of CCOVI were mentioned by most informants as setting the groundwork for quality. Many then described an investment wave, followed by an artisanal wave bringing a proliferation of small producers and négociants.

The pride displayed by respondents in recounting their trajectory from trailblazing pioneers to established wine region has important internal value, creating unity between wineries. While still in its infancy as compared to classic European wine regions, the capacity to relate a 40-year track record of mounting quality, savoir-faire and terroir definition provides credibility for external audiences.

Weaknesses

Low Exports Limiting Global Media Coverage

While most wineries emphasized the need to “own our home market” (OW2), prioritizing domestic sales over exports, eight echoed the WMAO’s finding that endorsement by external tastemakers is necessary for building domestic pride. Several agreed that, “if you want to get international people writing about you, your wines have to be available” (OW5). However, ten of 12 international informants mentioned a distinct lack of Ontario wine availability in their markets.

International exports accounted for less than 5% of sales for three-quarters of wineries interviewed. The three largest companies canvassed had among the lowest exports, respectively 1.5%, 2%, and 6%. This is a problematic reality, as “these are the companies with the financial resources to make a real impact on foreign markets” (OT4). The 2018 benchmarking survey found that only 36% of Ontario’s small wineries[33] are profitable (Deloitte and VQA Ontario, 2019). “We need more money to promote the region and the money isn't there at the winery level” (OW6).

In Ontario’s current state, with larger players not prioritizing export, and smaller producers lacking the means to invest, the region’s coverage by influential media is unlikely to grow. Producers will need to find other means to engage local audiences

[33] Defined as having under 0.5M CAD annual turnover

and/or work collectively to seek out and strategically allocate additional investment dollars.

Tactical Export Approach

A short-term approach to export was observed from several producers. One medium-sized winery (OW2) said, “export is tactical…you don’t make an export sale if you can sell for more locally.” Another viewed export as a means of discreetly selling excess stock at discounted prices: “it helps keep your inventory under control and no one here has to see” (OW5).

Ontario’s wide volume fluctuations, seen in Figure 8 and 10, are also an issue. According to Janet Dorozynski (2020, pers comm.) when crops are low, wineries “tend to re-shift allocations and keep it all domestically”. While this is understandable, consistent annual product allocations are required to establish long-term retail/on-premise export listings that grow recognition and incite sustained media interest.

Opportunities

Compelling Brand Story

Many Ontario interviewees recounted tales of triumph over adversity. They spoke of the 2001 multi-coloured Asian ladybug infestation, the 2014 and 2015 polar vortex winters, the ever-changing weather patterns. OW4 quipped “if you learn how to grow grapes here, you can grow grapes on the moon”. When asked what factors contribute to quality wine production in Ontario, local wine writer OT2 summed it up as “dogged persistence”.

Brand storytelling is a popular marketing strategy. According to Harvard Business School’s Dr. Jill Avery (2020), stories “generate higher levels of engagement, learning, persuasion, and inspiration for action” than other forms of communication. Ontario’s story evokes values of grit and determination that resonate with North American’s pioneering spirit. This could prove a compelling identity angle to explore, notably for connecting with domestic and American audiences.

Threats

Industry-wide Reporting Issues Undermine Credibility

Industry-wide reporting issues are a significant limiting factor for Ontario. The absence of more detailed VQA Ontario export data precludes analysis by wine style and variety. VQA sales values cannot be accurately compared with national figures. Vineyard acreage specifics are not disclosed, even within the industry; a fact mentioned by one international wine writer with derision (IM5).

This lack of detailed industry data is in stark contrast to regions like California, New Zealand, and Australia whose wealth of statistics allows them to identify and track key performance indicators to enhance strategic planning. The transparency displayed by these regions in publicly sharing figures builds credibility with external gatekeepers.

In preparation for a 2021 Canadian wine economic impact study, the WGC and regional wine associations discussed implementing a centralized data collection service. However, the COVID-19 pandemic has since shifted priorities (Hingorani, 2020). It is to be hoped that the project is rapidly reinstated once long-range planning resumes. Comprehensive, reliable data will allow for more responsive marketing strategies, allowing positioning tactics to be tested and adjusted, ultimately strengthening identity, and yielding greater return-on-investment.

5.3.4 Desire to Work Collectively

Strengths	**Weaknesses**
• Desire to prioritize region • Collective will to increase quality & renown	• Internal divisions undermine cohesion • Impaired brand manager effectiveness
Opportunities	**Threats**
• Building on i4C success	• Diminished spending post COVID-19 lock-down

Strengths

<u>Desire to Prioritize Region</u>

Two-thirds of Ontario respondents agreed that “we need to convince the international consumer that Ontario is a viable region first, before they'll buy individually” (OW13). Ten indicated that Canada should remain the banner for overseas promotional efforts.

For a nascent region producing small volumes, lacking a widely known producer/brand, and attempting to attract “A-list writers” (OW15) in saturated markets like London and New York, a national approach is most appropriate. However, the lack of a Wines of Canada brand manager to align the regions’ potentially divergent strategies into a coherent national identity risks limiting Canadian wine comprehension by tastemakers.

Collective Will to Increase Quality and Renown

Widespread evidence of collaborative winery initiatives exists in Ontario. VQA, the 2010 London trade tasting, the Bench tasting series, the i4C, and Somewhereness are all prime examples. These efforts unite the wine community around common goals of increasing quality and renown. They also help forge a shared vision for the region.

However, this cohesion appears to be limited to specific industry segments, lessening its effectiveness. Although ten wineries evoked a collegial atmosphere in Ontario wine country, several qualified their remarks suggesting that camaraderie exists only: “among winemakers” (OW9) or “among producers who are aiming high” (OW6).

Weaknesses

Internal Divisions Undermining Cohesion

An industry-wide rift was mentioned by 60% of winery respondents. Since 2009, small and large Ontario wineries have been represented by separate trade associations due to disparate strategic priorities: respectively Ontario Craft Wineries (OCW) and Wine

Growers Ontario (WGO)[34]. “We don’t have a collective forum where we all get along” said OW1. Internal divisions of this magnitude are a clear impediment to developing a cohesive identity.

Several small wineries suggested that larger players are holding back quality by encouraging growers to “grow solely for volumes to use as fillers for IDB wines” (OW17). While IDBs are a significant domestic revenue stream for Ontario’s largest wineries, most display a premiumization strategy with marquee VQA brands/wineries, such as Arterra’s Le Clos Jordanne or Andrew Peller’s Thirty Bench. Both companies are major i4C participants, with a terroir-focused, cool climate narrative for their top-tier wines (Le Clos Jordanne, 2020; Thirty Bench, 2019). This suggests that despite industry divisions, a common fine wine vision exists around which both groups can coalesce.

Impaired Effectiveness of the Brand Manager

As brand manager for VQA Ontario wines, the WMAO represents producers from both trade associations. This obligation to satisfy large and small wineries with “very different requirements” (OW4) was mentioned as a limiting factor by five wineries. The WMAO is further hampered in its effectiveness by uncertainty over its future provincial government funding (Kaiser 2020, pers comm.).

[34] WGO is the new name, as of June 2020, for the Winery and Growers Association of Ontario (WGAO)

Despite these challenges, 94% of winery respondents felt that the WMAO has been instrumental in increasing critical acclaim since 2015. “WMAO has really good international connections and delivers the media here and to our international tastings and events” (OW11). The WMAO’s in-bound missions bringing key trade and media to the region were also frequently cited.

Effective brand management is essential to ensuring the regional identity message is heard and understood by global gatekeepers. While the WMAO is impaired by wineries’ divergent priorities, it also brings producers together, representing their common interests. No suggestions for an alternative brand manager emerged during Ontario interviews. If the WMAO is to succeed more fully in its mission, support is required from wineries and trade associations for increased, long-term funding and to reach consensus over strategic priorities for the regional brand.

Opportunities

<u>Building on i4C Success</u>

The Paso Robles Wine Festival “convinced local growers that there was an opportunity to build a regional identity” according to Christensen et al. (2015). Similar reactions were observed from 68% of Ontario respondents regarding i4C. One producer (OW8) felt it galvanized Ontario’s cool climate narrative: “In the last ten years there's been huge focus and it all stemmed from i4C.” Another (OW10) claimed it brought producers, “away from bigger, oakier Chardonnays and back over to more classic styles”.

Many producers spoke of the collegiality the i4C creates internally, and its impact in boosting the region's visibility to international wineries and media. Five of the six interviewed international media have attended the event and echoed the views of Ontario respondents. Growing the scope of this event locally, and internationally, notably around the upcoming ICCWS 2021, would help cement Ontario's identity at home, reinforce Ontario's cool climate claim, and increase the number of Ontario wine media/trade ambassadors world-wide.

Threats

Diminished Spending post COVID-19 Lock-Down

Ontario wineries were obliged to shut their tasting rooms mid-March 2020 due to the COVID-19 pandemic, re-opening in a limited capacity mid-June 2020. As the main income source for most small wineries, the loss of cellar door sales is causing considerable financial strain. It is likely that over the following few years many wineries will find themselves less able to participate in collective efforts like overseas tastings and the i4C - described as "cost prohibitive" by OW16, who quoted an outlay of 5,000-10,000 CAD to participate (OW16). This will inevitably slow down efforts to grow global renown.

6. Conclusion

As international wine writer IM5 concluded: “Ontario has come a long way in a short time.” However, there is still significant work to be done to strengthen regional identity and increase international recognition.

This study posed three research questions. Its findings and analysis culminated in the following answers:

Over the past ten years, how far has Ontario come in terms of crafting a unique, regional identity?

The premium wine positioning espoused by Canadian export strategies and the WMAO was amply reflected in Ontario interviews. 22 of 25 respondents declared that the region produces high-quality wines. A decade of rising ambition embodied by efforts like the Bench tastings and Somewhereness, high-calibre academic institutions producing skilled winemakers and significant research outputs, and a formal appellation system underscoring the region’s terroir focus were each cited by 16 informants, as evidence of the region’s quality-minded approach.

Potential to develop the distinct mid-Atlantic taste profile evoked by 60% of local respondents is compromised by regularly observed Burgundy stylistic comparisons. Ontario’s diverse grape variety mix, dominance of multiple variety-labelled wines, and divided opinions on the need for a flagship preclude specialization at present. However, top cited varietal and stylistic strengths match the WMAO’s strategy, indicating a wellaligned narrative of core, cool climate grapes/styles. Over 90% endorsement from Ontario and international respondents on Chardonnay as a quality leader, as well as the i4C focus, and two-thirds support for Cabernet Franc, with its versatility and potential to differentiate, suggests that signature grapes may emerge over time.

Ontario's cohesive heritage story demonstrates internal unity and shared pride; virtues also displayed in the region's numerous collective initiatives to raise quality and renown since 2010. However, significant industry divisions undermine the effectiveness of VQA's brand manager and risk impeding efforts to strengthen Ontario's identity message.

How well recognized is Ontario's wine identity in key, international markets?

International interviewees consisted of a representative set of globally influential media and premium trade in the UK and USA. Among this group, nine of 12 endorsed the high quality of Ontario's wines, and eight evoked the region's unique geography. However, detailed terroir knowledge was lacking and few displayed familiarity with Ontario's appellations.

Respondents' emphasis on table wines as Ontario's greatest strengths indicates that the region has been successful in expanding international recognition beyond Icewine. Furthermore, the grapes cited align with the WMAO's core varieties, demonstrating that this strategy has been effectively communicated.

However, Ontario's cool climate identity is not clearly understood by international tastemakers, several of whom displayed marked scepticism. Furthermore, seven of 12 respondents perceived Ontario's wines as overly expensive given their lack of greater global renown. Limited availability as a major factor impeding greater recognition was mentioned by ten respondents.

While more than half of interviewees agreed that Ontario possesses a hybrid Old World/ New World style, Burgundy comparisons were frequent - both in terms of price evaluation and style. This is consistent with a sense derived from Ontario interviews that distinctiveness remains a work in progress.

What areas of improvement can be suggested to strengthen Ontario's global identity?

<u>Address Cool Climate Scepticism</u>

The lack of a formal cool climate definition affords Ontario the freedom to set its own parameters. However, if the region is to continue basing its identity around this term, a clear and succinct argument is required that convincingly overturns opinion formers' misgivings. As a dedicated cool climate research institute, CCOVI is best placed to achieve this objective. The 2021 i4C and ICCWS will be excellent platforms for testing this new message and galvanizing public opinion.

Develop Distinctiveness and Terroir Recognition

To gain recognition for distinctiveness while gradually narrowing variety/style focus, further development of the mid-Atlantic taste profile should be encouraged. For this to succeed, the industry must cease Burgundian comparisons and embrace the WMAO's VQA trend-setter positioning.

Emphasizing unique terroir facets and relating them in a concise, visually impactful manner will help develop greater awareness/retention of Ontario's geography and appellation system amongst global opinion formers. An increase in comparative appellation/sub-appellation tastings for premium wine-focused gatekeepers will also help underscore the terroir diversity message.

Work Towards Gradual Specialization

To expand the prominence of WMAO's core grapes/styles, certain issues raised by this study require attention. Progressively increasing production of single rather than multiple variety Cabernet Franc bottlings would help Ontario gain greater recognition as Cabernet Franc-focused region.

Options, such as leveraging an LCBO lower-alcohol trend, must be explored to boost Riesling's low commercial popularity, mentioned by 40% of Ontario respondents. Increased engagement would allow wineries to gradually build interest for Riesling fine wines.

Despite 92% international endorsement, mentions of unrealized potential, backed by variable quality concerns from ten local interviewees, indicate that more scrupulous vineyard management, yield reduction, and sorting are necessary to gain ground in the competitive, premium Pinot Noir sphere.

Over time, the establishment of flagship grapes/styles by site would be useful in demonstrating greater specialization, underpinning the terroir diversity narrative, and promoting Ontario’s appellation system.

Demonstrate Consistent, High Quality

To address variable quality concerns and boost global acceptance for its premium positioning, Ontario must demonstrate consistent, high quality to opinion formers. Screening wines for key media/trade tastings is an effective way to do this. Communicating this imperative and allowing event participants to collectively define quality screening parameters may serve to convince reluctant wineries.

Educate at Home to Win Abroad

A predicted trend of increased local consumption due to the COVID-19 pandemic provides opportunities for Ontario’s wineries to ramp up efforts to guide domestic consumer demand rather than catering to a presumed desire for diversity.

Redoubled educational efforts, at the LCBO and at cellar door, centred on core varieties and a simplified cool climate/ terroir narrative, backed by global media endorsements, would ensure ease of comprehension, and engender stronger allegiance to VQA wine.

Greater domestic engagement would aid wineries in soliciting increased private investment which, if funneled into global marketing initiatives and export pricing, should increase international recognition over time, creating a virtuous circle feeding back into domestic acceptance.

Improve the Framework for Growing Export

A significant increase in export investment is required to address international interviewee concerns over limited Ontario wine availability and expensive prices. Consistent annual product allocations are required to build sufficient market presence to incite wider media coverage. Furthermore, market appropriate, tiered pricing structures are necessary to encourage trial.

To support wineries in these endeavours, effective tools and strong brand management are necessary. More detailed, reliable data would allow for the tracking of key performance indicators to enhance strategic planning. With long-term, stable financing, the WMAO could take on this role and build on the success of their current international activities.

Finally, dedicated Wines of Canada brand management would be useful in coordinating regional associations and crafting a cohesive national identity for overseas promotions.

Final Thoughts

The past ten years have seen Ontario wines gain increasing international recognition. Now, the region finds itself at a point of inflection: stay the present course or work collectively to refine its identity narrative and cement its quality-focused positioning. It is the author’s hope that the findings, analysis, and conclusions presented in this paper will contribute useful insights to help Ontario achieve the latter.

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8. Appendices

8.1 List of Acronyms

CVA: Canadian Vintners Association *(now Wine Growers Canada)*

GAC: Global Affairs Canada

GGO: Grape Growers of Ontario

ICCWS: International Cool Climate Wine Symposium

IDB: International Domestic Blend

i4C: International Cool Climate Chardonnay Celebration

LENS: Lake Erie North Shore

OCW: Ontario Craft Wineries

PEC: Prince Edward County

VQA: Vintners Quality Alliance

WGAO: Winery and Grower Alliance of Ontario *(now Wine Growers Ontario)*

WGC: Wine Growers Canada *(formerly Canadian Vintners Association)*

WGO: Wine Growers Ontario *(formerly Winery and Grower Alliance of Ontario)*

WMAO: Wine Marketing Association of Ontario

8.2 Approved Research Paper Proposal

IMW Research Paper Proposal Submission Form			
Student ID	**23895**	**Date of submission**	**02/12/2019**
RPP Version No	**3**	**Name of Advisor**	**Sarah Knowles**

Note: RPPs must be submitted via your Advisor to the IMW

Proposed Title

A Study into Ontario's Quest for Global Fine Wine Recognition

Research Questions: Define the subject of your Research Paper and specify the specific research questions you plan to pursue. (No more than 200 words)

The 2018 – 2022 Canadian Vintner's Association (CVA) export strategy is centred around an ambitious vision statement: "Canada is globally recognized as one of the world's finest producers of premium cool-climate wines" (Canadian Vintners Association, 2017). This objective mirrors the intent of the CVA's first Canada-wide export plan written in 2009.

Over 70% of Canadian wine production, and exports, hail from Ontario (grapegrowersofontario.com). In recent years, the Ontario wine industry has made concerted efforts to increase international exposure, and transition focus from Icewine to table wines.

Accolades and praise from influential wine media is increasing world-wide. However, press articles still regularly include explanatory messages suggesting that Ontario's self-proclaimed premium, cool climate identity remains somewhat obscure:

"Ontario's genres and varieties…defy easy categorization," (Jefford, 2018)

"Many think Ontario is simply too cold for making fine wine…" (Asimov, 2018)

"There were plenty of wines to get very excited about, but producers need to be mindful of the price…" (Dean, 2016)

This research aims to explore the following:

1. Over the past 10 years (2010-19), how far has Ontario come in terms of crafting a unique, regional identity?

2. How well recognized is Ontario's wine identity in key, international markets?

3. What areas of improvement can be suggested to strengthen Ontario's global identity?

Background and Context: Explain what is currently known about the topic and address why this topic requires/offers opportunities for further research. (No more than 200 words)

The Ontario wine industry has made remarkable strides since replacing labrusca plantings with vinifera vines and establishing the Vintners Quality Alliance (VQA) appellation system in the late 1980s. The region has since grown from 17 VQA wineries to 178 today (Vqaontario.ca, 2019).

In the 1990s, renown for Ontario's Icewine opened the doors to exports. Export plans devised as recently as 2018 focus on leveraging Icewine's high status position to launch premium table wines. Table wines account for over 90% of Ontario's annual VQA production, whereas Icewine makes up just 3 to 5% (VQA Ontario Annual Reports 2010, 2019).

Since 2010, VQA export sales have grown 161% by value, as compared to a 77% increase for total VQA sales value (VQA Ontario Annual Reports 2010, 2019). However, Icewine continues to dominate, with a roughly stable market share since 2010, at 60% of export sales value (canadianvintners.com, 2018). Ontario's table wines have gained significantly in favourable press and prestigious accolades in recent years, and yet remain little known or understood outside of Canada (Janet Dorozynski, 2019).

Territorial branding and regionality research have demonstrated the benefits of strong identity in developing global recognition and added value (Easingwood, Lockshin and Spawton, 2011. Charters and Spielmann, 2014). Multiple Ontario wine-focused studies call for more distinct identity creation to transition international focus away from Icewine, though none delve into how this could occur.

Sources: Identify the nature of your source materials (official documents, books, articles, other studies, etc.) and give principle sources if appropriate. (No more than 150 words)

<u>Ontario VQA wine reports & statistics</u>:

VQA Ontario and Deloitte. *Ontario Wine and Grape Industry Performance Study 2015 - 2018*.

VQA Ontario Annual Reports 2010 – 2019

Canadian Vintners Association (2017). *Canadian Wine Industry Long-Term International Trade Strategy 2018 - 2022*.

The National Export Working Group and Foreign Affairs and International Trade Canada. (2009). *A National Export Strategy for Canadian Wines*.

Concepts of Regionality, Territorial Brands, and Value Creation:

Easingwood, C., Lockshin, L. and Spawton, A. (2011). The Drivers of Wine Regionality. *Journal of Wine Research*, 22(1), pp.19-33.

Christensen, B., Kenney, M. and Patton, D. (2015). *Regional Identity and Value Creation in the Wine Industry*. [online] University of California, Davis. Available at: https://brie.berkeley.edu/sites/default/files/regional-identity-and-value-creation-in-the-wine-industry.pdf.

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Charters, S., and Mitchell, R. (2011). Critical success factors for an emerging territorial brand: The case of Central Otago wines. Australian and New Zealand Marketing Academy Conference, Perth, Australia, 28-30 November: ANZMAC

Cool Climate Wine & Consumer Preference:

Burgess, L. (2019). *Cool Climate Wines: The Best of Northern Hemisphere Vineyards - Christie's International Real Estate*. [online] Christie's International Real Estate. Available at: https://www.christiesrealestate.com/blog/cool-climate-wines-the-best-of-northern-hemisphere-vineyards

Research Methodology: Please detail how you will identify and gather the material or information necessary to answer the research question(s) and discuss what techniques you will use to analyse this information. (No more than 500 words)

The researcher intends to use both quantitative and qualitative research methods, separated into several phases as follows:

Phase 1

Analysis of the evolution in:

- VQA sales volume & value 2010 – 2019
  - overall
  - by wine style (table, sparkling, Icewine, other)
  - by grape variety
- VQA export sales volume & value 2010 – 2019
  - by wine style (table, sparkling, Icewine, other)
- number of VQA wineries
- hectares dedicated to VQA production

To determine how Ontario VQA has evolved over the past decade - overall and specifically in terms of style and cultivar significance (in Ontario and on export markets).

Phase 2
Analysis and comparison of CVA's 2009 and current 2018 – 2022 export plans to gain insights on their positioning strategy for Canadian wine, the quantitative and qualitative objectives of each plan, and how/why they have evolved over time.

Canada-wide CVA strategies will be compared with Ontario specific targets (obtained from Wine Marketing Association of Ontario) to see if plans are creating complementary streams or areas of divergence.

Phase 3
Semi-structured interviews to determine how local industry players self-identify vs. legitimacy of Ontario's fine wine identity with international opinion formers.

- Local opinion formers (six interviews):
  - Press: David Lawrason, Tony Aspler, Christopher Waters
  - Sales: LCBO Ontario category manager, Fine Dining Sommelier, Wine Marketing Agency
- Ontario wineries (16 interviews)
  - Small (≤100K L)/year): Ten, including Hidden Bench, Bachelder, Pearl Morrisette, remaining seven will include two from Prince Edward County
  - Medium (100K L to 750K L/year): Four, including Cave Spring, Tawse Winery, two others (one from Lake Erie North Shore)
  - Large (> 750K L/ year): Two largest wineries in province
- Industry Marketing Association & Government Representative (two interviews)
    - Magdalena Kaiser, Wine Marketing Association of Ontario, Janet Dorozynski, Canadian Trade Commissioner, Beer, Wine, Spirits
- Wineries selected as a representative cross-section of small to large VQA producers from across the province's three VQA regions – weighted by relative size and significance.
- Permission has been obtained by cited opinion formers, wineries, industry associations and government official.
- Questions formulated around core themes common to territorial branding, regionality, and brand image studies; namely:
  - **Unique Character** (terroir-driven, specialized)
  - **Quality** (high, consistent quality, sustainable values)
  - **Shared Vision** (single narrative: heritage, USP, future ambitions)
  - **Collective Voice** (strong, agreed upon brand manager)
  - Impact of high scores/medals on export development will also be explored with concerned wineries

- Internationally (12 interviews):
  - UK press: Jamie Goode, + two others
  - London sales: The Wine Society, London fine dining sommelier, London fine wines importer

- USA press: Eric Asimov (NY Times), + two others
- NY sales: Fine dining sommelier, NY premium wine merchant, US fine wine importer

- Questions on legitimacy of Ontario's fine wine identity: quality, USP, value/ price
- Press interviewees selected for international acclaim and familiarity with Ontario wines. Sales interviewees all currently work, or have worked, with Ontario wines.

Phase Four

- Regroup information gathered from phase one to three into the above stated core themes of regional identity and territorial branding. For each section, identify strengths and opportunities (areas of common accord backed up by the quantitative analysis), as well as weaknesses and threats (areas of divergence, confusion, or negative opinion).
- Use this analysis to answer the three stated research questions

Potential to Contribute to the Body of Knowledge on Wine: Explain how this Research Paper will add to the current body of knowledge on this subject. (No more than 150 words)

Climate change is shifting the landscape of quality wine production world-wide. Many emerging regions, previously dismissed for their marginal climates, are gaining in importance and look set to continue their rise. Increasing consumer preference for lower alcohol, lighter wine styles is supporting this shift (Burgess, 2019).

Ontario premium wine is stylistically well positioned to fill a high status, niche position in the cool climate genre. An analysis of the strength of Ontario's regional identity construction, viewed from an insider vs. outsider perspective, should provide useful learnings - chiefly to the industry itself - but also to emerging quality wine regions elsewhere in Canada and in other, similarly marginal climates world-wide.

Proposed Time Schedule/Programme: This section should layout the time schedule for the research, analysis and write-up of the Research Paper and should indicate approximate dates with key deliverables. *Dates of submission to both Advisors and the IMW must be those specified by the IMW.*

Submission of RPP to advisor: October 25, 2019

Submission of advisor approved RPP to Institute: November 1, 2019

RPP refinement period, continued literary revue, VQA 2010 to 2019 quantitative analysis and export strategy comparison studies (phase one and two of methodology): November to end December, 2019

Interview period, transcription, coding and classification: January to end February, 2020

Interview content analysis, SWOT elaboration, and RP write-up: March to early May, 2020

Submission of RP to advisor: May 13, 2020

Submission of RP (via advisor) to Institute: June 25, 2020

8.3 Questionnaires

It was made clear to interviewees at the outset that questions referred exclusively to 100% Ontario grown, VQA wines.

Ontario Wineries & Media

1. How would you describe the wines of Ontario to someone who had never tasted them before?

2. How do Ontario's best wines compare, quality-wise, with the classic fine wines of the world?

3. What, if anything, differentiates Ontario wines from these classic regions?

4. What factors contribute to Ontario's capacity to produce quality wine?

5. What wine style or grape (single or plural) is Ontario's greatest strength?

6. Does Ontario have, or should they have, a flagship wine style/ grape?

7. What are the key milestones or events in Ontario's history as a wine region that led to quality wine production?

8. Name a few of the driving forces behind this evolution.

9. Over the past 10 years, has Ontario's identity as a wine region evolved? If so, how?

10. Over the past 10 years, what (if any) initiatives have helped Ontario wines become more renowned?

11. Is there a collective will in Ontario to promote the region over individual winery brands to grow global sales and renown?

12. If so, which organization, or person, is/should be Ontario's brand ambassador?

13. What major challenges do Ontario wineries face in terms of growing image and reputation?

14. How do you envision the future for Ontario wines?

15. Do you export any wine? If yes, where and why?[35]

[35] Question 15 was only asked to winery respondents

Ontario Trade

1. When did you first start listing Ontario wines in your range, and why?

2. Has the number of Ontario wines and/or wineries you list grown since then? Why or why not?

3. How well understood are Ontario's VQA wines by your consumers today?

4. How would you describe the wines of Ontario to someone who had never tasted them before?

5. How do Ontario's best wines compare, quality-wise, with the classic fine wines of the world?

6. What, if anything, differentiates Ontario wines from these classic regions?

7. What factors contribute to Ontario's capacity to produce quality wine?

8. What wine style or grape (single or plural) is Ontario's greatest strength?

9. Does Ontario have, or should they have, a flagship wine style/ grape?

10. How do you envision the future for Ontario wines?

International Media

1. Describe your first encounter with Ontario wine.

2. What were your impressions at that time?

3. Have your opinions evolved since then?

4. Have you ever visited Ontario wine country? If so, can you describe the purpose of your visit and your overall impressions?

5. How would you describe Ontario's wine regions and wines to someone unfamiliar with them?

6. What wine style or grape (single or plural) is Ontario's greatest strength?

7. What, if anything, is distinctive about Ontario wines?

8. How would you rate the quality and price/value ratio of Ontario's premium level wines?

9. Have you ever attended a Canada-wide or Ontario-specific wine tasting or event?
    - If so, did you feel that Ontario projected a clear sense of regional identity?

10. Do you think Ontario wines can carve out a niche with premium wine lovers in your market? Why or why not?

<u>International Trade</u>

1. When did you first start listing Ontario wines in your range, and why?

2. Has the number of Ontario wines and/or wineries listed grown since then? Why or why not?

3. How do you market these wines to your customers?

4. What has the consumer reaction been to your Ontario wine selection?

5. How do you see the future for Ontario wines within your range?

6. How would you rate the quality and price/value ratio of Ontario's premium level wines?

7. What wine style or grape (single or plural) is Ontario's greatest strength?

8. What, if anything, is distinctive about Ontario wines?

8.4 Table of Interviewees

Code	Descriptor	Location	Interview Date	Interview Mode
OW1	Owner of a medium sized winery (100k-750k l/yr sales)	Niagara	23/12/2019	In person
OW2	Director of Sales & Marketing for a medium sized winery	Niagara	23/12/2019	In person
OW3	Owner of a small winery (<100k l/yr sales)	Niagara	23/12/2019	In person
OW4	Winemaker for a small winery	Niagara	12/01/2020	In person
OW5	Winemaker for a medium sized winery	Niagara	13/01/2020	In person
OW6	Owner of a small winery	Niagara	13/01/2020	In person
OW7	Owner of a large winery (750k l/yr + sales)	Niagara	13/01/2020	In person
OW8	Winemaker for a small winery	Niagara	14/01/2020	In person
OW9	Owner of a small winery	Niagara	14/01/2020	In person
OW10	Consultant winemaker for several small wineries	Niagara	14/01/2020	In person
OW11	Owner & winemaker for a medium sized winery	Niagara	15/01/2020	In person
OW12	National Sales Manager for a large winery	Niagara	17/01/2020	In person
OW13	Owner of a small winery	Niagara	15/01/2020	In person
OW14	President & CEO of a medium sized winery	LENS	16/01/2020	In person
OW15	Owner of a small winery	Niagara	14/03/2020	In person (Montreal)
OW16	Operations Manager for a small winery	PEC	11/03/2020	Over the phone
OW17	Owner of a small to medium sized winery (small PEC production volume)	PEC	25/03/2020	Over the phone
OT1	Wine Writer	Toronto	15/11/2019	Over the phone
OT2	Wine Writer	Niagara	14/01/2020	In person

Code	Descriptor	Location	Interview Date	Interview Mode
OT3	Wine Writer	Toronto	17/01/2020	In person
OT4	Master Sommelier	Toronto	17/01/2020	In person
OT5	LCBO Category Manager	Toronto	16/01/2020	In person
OT6	Owner of a wine sales agency	Toronto	11/03/2020	Over the phone
OT7	Director of PR, Wine Marketing Association of Ontario	Niagara	13/01/2020	In person, phone & email
OT8	Trade Commissioner, BWS, Global Affairs Canada	Ottawa	04/03/2020	In person, phone & email
IM1	Wine Writer	USA	03/02/2020	Email
IM2	Wine Writer	USA	05/02/2020	Over the phone
IM3	Wine Writer	USA	11/02/2020	Over the phone
IM4	Wine Writer	UK	10/02/2020	Email
IM5	Wine Writer	UK	06/02/2020	Over the phone
IM6	Wine Writer	UK	17/02/2020	Over the phone
IS1	Sales Director, National Importer	USA	06/02/2020	Over the phone
IS2	Sommelier	USA	12/02/2020	Over the phone
IS3	Retail Wine Buyer	USA	09/04/2020	Email
IS4	Head Brand Manager, National Importer & Distributor	UK	26/03/2020	Email
IS5	Sommelier	UK	17/02/2020	Over the phone
IS6	Retail Wine Buyer	UK	27/02/2020	Email