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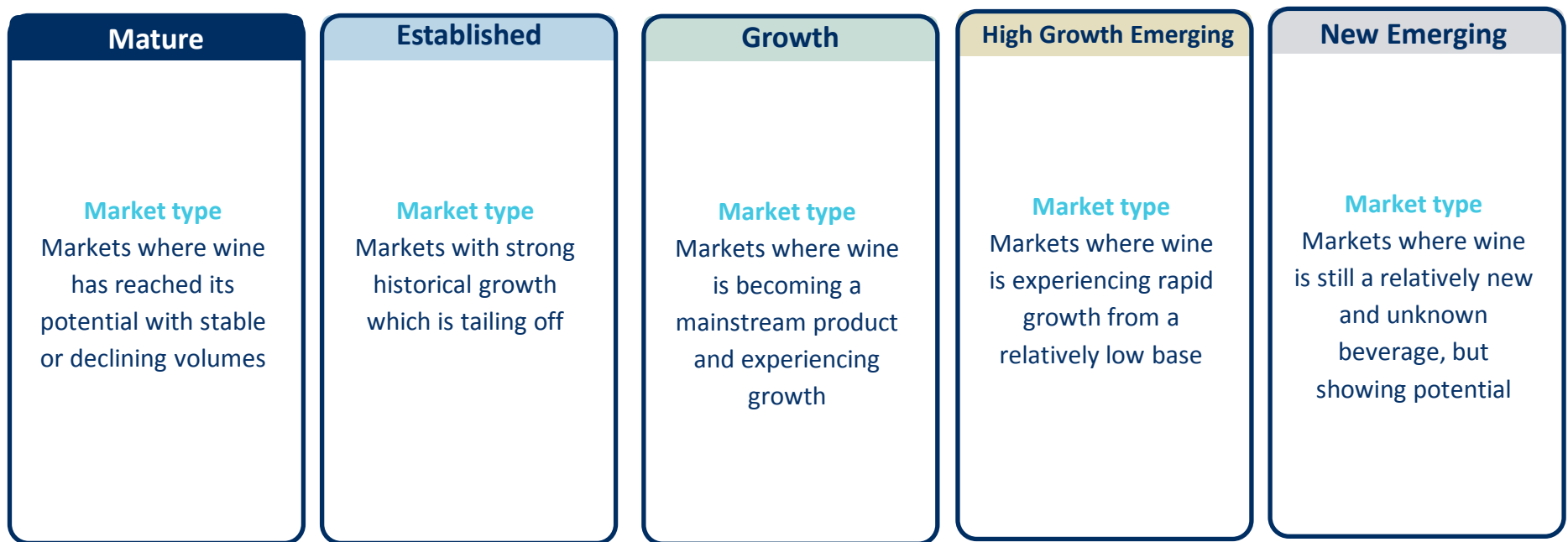
March 2014

The logo for the 2014 Ontario Grape+Wine Industry report, featuring the word "INSIGHT" in a large, bold, sans-serif font, with "2014 ONTARIO GRAPE+WINE INDUSTRY" in a smaller font below it. The text is enclosed within a circular border. The logo is part of a larger graphic with several colored lines (grey, green, teal, brown) radiating from the left side of the circle.

INSIGHT

2014 ONTARIO GRAPE+WINE INDUSTRY

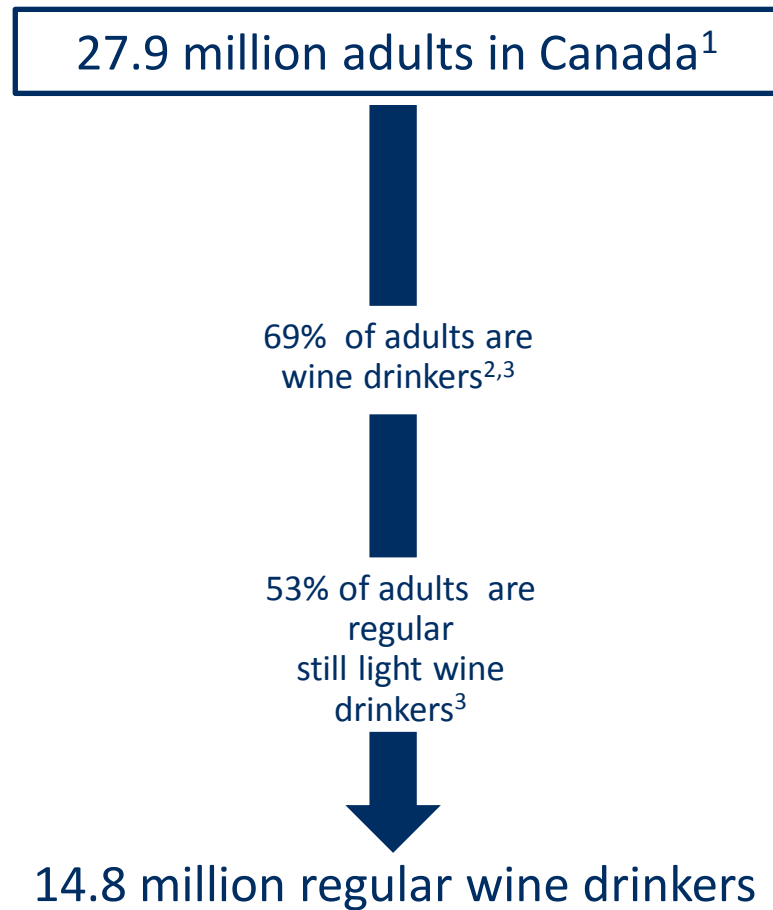
## The Wine Intelligence wine market classification model



# Markets are ranked by attractiveness within groups...

Mature	Established	Growth	High Growth Emerging	New Emerging
<b>Markets</b> Germany France Austria Italy Argentina South Korea Spain Portugal Chile Uruguay Slovenia Greece Hungary Croatia	<b>Markets</b> Switzerland UK Australia Netherlands Belgium & Lux Denmark New Zealand Ireland Romania South Africa	<b>Markets</b> USA Japan Canada Sweden Norway Finland	<b>Markets</b> China Hong Kong Macau Singapore Brazil Russia Poland Czech Republic Mexico Taiwan Slovakia Estonia	<b>Markets</b> Indonesia Malaysia Thailand Turkey Peru Philippines Vietnam Colombia Angola India Nigeria

12th



Regular wine drinkers = drink wine at least once per month

Sources: <sup>1</sup> STATCAN

<sup>2</sup> wine=still light wine (red, white, rosé)

<sup>3</sup> Wine Intelligence online calibration study with YouGov, Sep '12, n=1,009 Canadian adults



11.1  
million

3.7  
million

# The world as it should be...



RETRO



FEEL GOOD

# RETRO

Seeking  
comfort and  
inspiration in  
the past







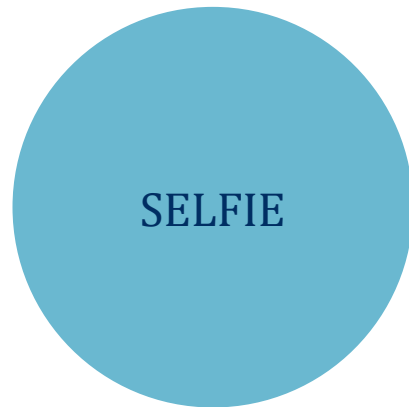
## FEEL GOOD

Looking after  
my conscience  
& well-being -  
and yours' too





# Your place in the world...



**SELFIE**  
Expressing  
your  
individuality  
to those  
around you







**TRIBAL**  
Sense of  
belonging  
derived from  
being part of a  
group



Become a Naked Wine Angel



# Making sense of the world...



VISUALISATION



TRANSPARENCY



**VISUALISATION**  
Simplify &  
summarise,  
creating  
instant visual  
impact





## TRANSPARENCY

Traceable  
honesty to  
reassure our  
sense of  
responsibility





# The world as it is...

BEING  
THERE

BLENDED

OBSESSIVE

# BEING THERE

Delighting in  
experiences we  
can cherish &  
often share







## BLENDED

Blurring the  
traditional  
social & cultural  
boundaries in  
our busy lives

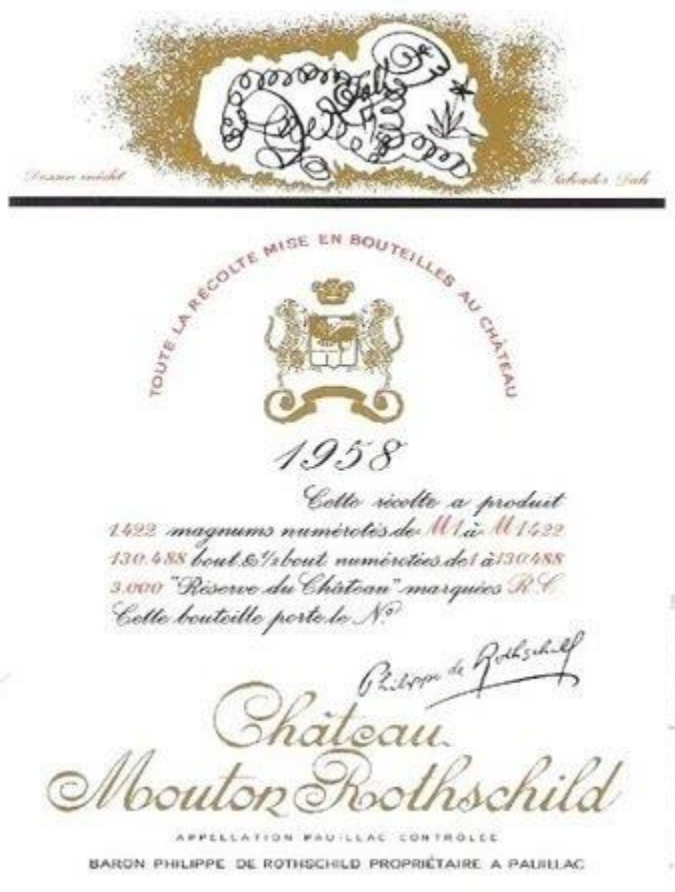






**OBSESSIVE:**  
Celebrating  
being  
dedicated,  
fanatical &  
focused





Causes

Multi  
channel &  
sectors

Retro  
storytelling

Community  
funding &  
purchasing

Multi origin,  
variety &  
category

Moderate  
alcohol

Ethical  
production

Visual  
branding

Individual  
serves