



Wine
Country
Ontario™

Marketing Plan

Fiscal Year 2014-2015

**Submission from the Industry Marketing
Committee**

January 17, 2014

COMMERCIAL CONFIDENTIAL



Marketing Plan Process

Process:

The annual Wine Country Ontario Marketing Plan is built in many ways and through many meetings and collaborations. Tactics are influenced through the consultation and input of the Industry Marketing Committee (IMC) – a collaboration with representatives from the Government of Ontario, VQAO, the GGO and the Wine Council of Ontario. LCBO as our retail partner and other key stakeholders are consulted and engaged in the process. WGAO was invited but declined to participate. These meetings have also featured extensive presentations on commissioned research and our service providers.

Benefits of the Marketing Plan:

The marketing plan is a consumer focused strategy that is designed to have a positive impact on consumer behaviour, perception, purchase intent, understanding and loyalty for Ontario VQA wines and Ontario's wine regions. All stakeholders will see direct or indirect benefit as we achieve the objectives detailed in this Plan.

On-Going Collaboration:

Throughout the year the execution of the Plan is guided in consultation with representatives of the IMC and various working committees that are formed when a specific skill set is required to assist in building and guiding individual marketing activities.

This year the Industry Marketing Committee met 8 times to give strategic oversight to the plan evolution and for the development of this proposed plan. Plan tactics were guided and supported by the work of 7 working committees of industry representatives. These working committees met 14 times in total over the course of the year to date. The Wine Council is grateful for this commitment and energy from all of our partners.



Plan Development Timeline

Stakeholder Engagement

- Industry Marketing Committee Meetings March 27, May 8, July 4, July 30, September 6, December 4, December 18, January 16, 2014
- Working Groups and Committees held 14 separate meetings between April and December 2013
- 15 communications/newsletters have been sent out to all Wine Country Ontario participants since April

Key Foundational Research and Strategies

- Consumer Usage and Attitude Study (1,843 participants, rolling study).
- International Wine Tourism Conference
- Ontario Tourism Marketing Partnership Corporation, Canadian Tourism Commission and Tourism Partnership of Niagara.
- VQA Sales Trends
- Ad Tracking and Awareness
- VQAO Strategic Objectives
- National Export Strategy and Initiatives



Measuring Growth and Performance

RESULTS TO DATE



Our Brand Elements

Our Brand Mission

To be the leading marketer of the Ontario wine industry, by inspiring, educating and championing Ontario wine and the romance of the unique places where it's made.

Our Brand Vision

To make Ontario wines the #1 choice of Ontarians.

Our Brand Positioning

We represent the only wine country experience that Ontarians can explore in their own backyard. The one place where residents and visitors can come to enjoy the full essence of what our provinces wine country has to offer: spectacular wines, passionate growers, and winemakers, local food, gorgeous scenery, exciting activities, unique architecture and warm hospitality.

Brand Personality

Welcoming, Proud, Pioneering, Passionate, Confident and acting as a Catalyst (connecting food and other cultural elements).

Core Essence – “Local Tastes Better”

Pillars: Place, Pride and Connectivity.

As part of the ongoing work of Wine Country Ontario and as captured in our reporting to the Government of Ontario, our plan and delivery on our strategies to support the brand are tracked and monitored by both qualitative and quantitative measures. As one evaluates the proposed plan, it is important to appreciate the successes and challenges that this proposed plan seeks to address.



Summary of Achievements

Brand Health Highlights

- ❖ Ontario leads in consumer loyalty scores.
- ❖ Ontario leads in top of mind recall of wine regions producing high quality wine.
- ❖ Ontario leads in consumer purchase intent.
- ❖ Ontario wines perform strongly on the top drivers of brand loyalty.

Consumer Engagement Through Sampling Initiatives Highlights

- ❖ From FY 2010-11 to date we have sampled over 2.2 million consumers.
- ❖ Venues and events request to have Ontario VQA wines sampled to their consumers to add value to their shows and events (Christmas Market, Winterlude, DFS, etc.)
- ❖ LCBO in-store tastings had a conversion to sale rate of 18%-23% during Period 7

Wine Country Ontario Education and Awareness

- ❖ Over 5,000 Wine Appellations of Ontario educational program course books in circulation with students, college educators, university educators, restaurants, wine clubs, wineries and bartending schools from 2010 - 2013.
- ❖ A total of 20,000 copies of Wine Country Ontario: Our Story educational brochures in circulation with trade, media, exporters and influencers, additional 14,000 electronic copy downloads. Addendum added in 2013 as we work on enhancements for the new version.
- ❖ Almost 2,000 LCBO Staff experienced educational immersion tours since 2010. These tours not only increase knowledge they drive loyalty and ambassadorship.
- ❖ Over 1000 media and influencers (bloggers, licensees, Product Consultants, WOW leaders, sommeliers, Product Ambassadors and wine educators) have experienced one or more of the following activities; Tutored Tastings, Walk About Tastings, FAM tours, Themed Tastings and events.
- ❖ Hosted top key international wine media on FAM's in Ontario including Steven Spurrier, Jamie Goode and Christy Canterbury resulting in valuable editorial coverage in *Decanter* magazine. Plans to host Andrew Jefford (Decanter) along with 6 top UK sommeliers in January 2014.
- ❖ Integrated key export initiatives with PR to meet top wine media abroad including Jancis Robinson, Oz Clarke, and Stephen Brooke.



Summary of Achievements

Wine Country Ontario Tourism Highlights

- ❖ Total visitation to Wine Country Ontario in 2010 was 1 million. In 2013 1.8 million Ontarians alone visited wineries in Ontario. We know that Ontarians make up over 80% of the total travellers to Wine Country Ontario.
- ❖ Our key travel tool the Wine Country Ontario travel guide has reached over 2.5 million consumers between 2010 to 2012. Map only version has reached 750,000 between FY 2010 and today. 75,000 copies were inserted into Maclean's magazine in 2013, and the map is also reproduced and distributed in other publications.
- ❖ Ontario winery secret shopper customer experience scores move from 75% in 2010 to 80% in 2013. Slight declines from 2012 are directly attributable to new wineries and wineries new to the program participating. This also allowed a terrific opportunity for retail training and identifying gaps.
- ❖ Annual ad campaign scores on the rise in all primary measures. Awareness grew from 22% in 2010 to 32% in 2012 while industry norms remain at 5-15%.
- ❖ The advertising campaign allowed for 138 million impressions reaching 75% of our target market.
- ❖ Wine Country Ontario website (www.winecountryontario.ca) showed an increase of 15% over last year in visits to the site month over month.
- ❖ We have continued to enhance 2 key partnerships with the private sector. Maclean's magazine has plans to publish a 2nd edition of *Wine in Canada* in May of 2014. Visa included 4 wine country experiences in the "Visa Infinite Dining Series" in 2013 and plans are in development for 2014



Summary of Achievements



Twitter

- Launched July 2010
- 4,011 followers in 2011
- 5,646 followers in 2012
- 8,087 followers in 2013
- Growth of 43.2% since last year
- Tweetlevel 63 in 2011, 69 in 2012,



Facebook

- Launched July 2010
- 5,775 fans in 2011
- 27,435 fans in 2012
- 31,295 fans in 2013
- Growth of 14% since last year



Instagram

- Launched September 2013
- 277 followers
- Following 569 wineries, fans and influencers
- 850 image likes

Klout



- Klout score 39 in 2011, increased to 57 2012, increased to 66 in 2013
- Growth of 15.8% since last year



Who they are, where they live and how to reach them.

OUR TARGET CONSUMER



Strategic Targets are key

- ❖ With limited budgets we need to be strategic in targeting our consumer
 - ❖ Best bang for our buck, best opportunity to drive sales
- ❖ So we first determine who they are. We do that in the following ways:
 - ❖ Conduct a segmentation study that breaks down wine drinkers into different segments depending on their wine buying behaviour.
 - ❖ With the researcher we review the segments and determine what segments we should target (our core target) based on their perception of the Ontario wine category (they must be open and receptive) and the size of the segment (the larger the segment the greater the return).
- ❖ This research also allows us to determine where they live and the best ways to reach and communicate with them.
- ❖ With this information we are able to select the right media channels to reach our core targets and allocate our investments in things like social media and other marketing programs to effectively reach the core targets.
- ❖ This study is repeated every 3 years as consumer behaviour changes and the wine category landscape changes. It helps us to sense check and refine as needed.
- ❖ This study was conducted in Spring 2013 and suggested several target segments



Segmentation Results – Potential Targets



Spontaneous Shoppers

Strongest segment

Size: 25%

- While this segment has lower average spend, they are a moderate-to-high level wine consumer who is interested in wine, enjoys browsing and likes to experiment with wine.
- They are more responsive to, and proud of, wine from Ontario. They feel it is a wine for them and are likely to purchase it in the future.



Aficionados

Secondary segment

Size: 19%

- This primarily male driven segment has the highest spend, purchase the most amount of bottles in a month, and is most likely to have a wine cellar/fridge. This group feels strongly about wine, and is the go-to person for wine recommendations.
- They favour to wine from international regions over Ontario wine – feeling Ontario wine isn't for them.



Predictable Purchasers

Moderate/Strong segment

Size: 22%

- While this segment has an average spend level, they aren't likely to experiment, and typically plan their wine purchase before going to the store. As moderate consumers, they are willing to pay more for wine from a desired region.
- One-third of their current wine purchases are of Ontario wine, and they are likely to purchase it in the future.



Disengaged

Moderate/Weak segment

Size: 22%

- Despite having a moderate level spend on an average bottle, they are largely light wine consumers, and mostly buy wine for special occasions.
- This group is receptive to Ontario wine, and about one-third of their wine purchases is from Ontario.



Cheap and Simple

Weakest segment

Size: 12%

- While this group doesn't have the lowest average spend per bottle, they are the lightest wine consumers. They will stick to wines they know, aren't willing to experiment, and are not willing to pay more for a preferred region.
- While loyal to Ontario wine, it is primarily because they see it as good value for their money.



How to reach each segment



Spontaneous Shoppers

- This group would benefit most from an in-store campaign or event.
- While they like to browse, they may not be likely to spend more unless they know it is worth it; therefore either special promotions or in-store tasting may help encourage them.



Aficionados

- This group is loyal to imported wine, and to target this group, Wine Country Ontario needs a campaign that convinces them the quality, taste and value of Ontario wine is on-par, or better than, the imported brands.
- This group doesn't see Ontario wines as something to 'impress' with.



Predictable Purchasers

- Since this group know what they want before they go to the store, they would benefit from out of home campaigns.
- They are more willing to purchase based on region and style – showcasing the various regions may appeal to this group.



Disengaged

- Despite willing to spend more, this group is not interested in wine, and their choice is driven by their need.
- Since they won't seek out information, Wine Country Ontario would best reach this group in-store, with campaigns around special events – highlighting why Ontario wine is good for a special occasion.



Cheap & Simple

- WCO should not focus efforts targeting this group because of the low potential. They are the lightest wine consumers, are not willing to experiment, and price is a key concern for them.



Narrowing the target to focus on driving best results



	Aficionados	Spontaneous Shoppers	Predictable Purchasers	Disengaged	Cheap and Simple
REGION					
GTA	48%	43%	40%	50%	35%
Ottawa	11%	11%	9%	8%	11%
Southwestern Ontario	12%	16%	16%	12%	21%
Golden Horseshoe	9%	10%	13%	13%	8%
Other Ontario	20%	20%	21%	16%	24%
AGE					
19-34	19%	32%	18%	35%	16%
35-54	39%	41%	37%	38%	44%
55+	42%	27%	46%	27%	40%
MEAN	51	46	52	45	51
Male	61%	45%	47%	62%	41%
Female	39%	55%	53%	38%	59%



Other insights on our targets

- ❖ ‘Cheap and Simple’ want to be assured of the value for their money when buying alcoholic beverages, as well as ‘Spontaneous Shoppers’ who are also influenced more by special promotions.
- ❖ ‘Aficionados’ and ‘Spontaneous Shoppers’ like to browse more when shopping.
- ❖ Not surprisingly, ‘Aficionados’ are more engaged with wine and would like to learn more about it. They are also more willing to experiment with wines from different regions, and, along with ‘Predictable Purchasers’, region has more influence on purchase decision.
- ❖ ‘Aficionados’ are most likely to have visited an Ontario winery within the past year, as well as within the past 6 months. ‘Cheap and Simple’ are the least likely to have ever visited an Ontario winery overall.
- ❖ Aficionados and Spontaneous Shoppers are high users of social media



Results and Insights from the 2013 Usage and Attitude Study

UNDERSTANDING OUR CONSUMER



Usage & Attitude Research

- ❖ The objective of this research study is to track wine usage and wine attitudes among Ontario wine drinkers. This is the fourth year that we have conducted this research.
- ❖ This study was conducted online, with respondents sourced through the Angus Reid Forum (ARF) consumer panel.
- ❖ In total, we surveyed 1826 consumers who purchased wine in the past 4 weeks, who typically spend more than \$10 on a bottle of wine, and who live in the following regions of Ontario:
 - ❖ GTA (n=710);
 - ❖ Ottawa (n=360);
 - ❖ Southwestern Ontario: London-Kitchener-Waterloo (n=303);
 - ❖ Golden Horseshoe: Hamilton-St. Catherine's-Niagara Falls (n=201);
 - ❖ Rest of Ontario (n=252)



Overall Landscape & Market Performance

- ❖ Overall, wine purchases have leveled off from the increase seen last wave. Ontario wine buyers are storing slightly fewer bottles this wave compared to last wave.
 - ❖ Regionally, Southwestern Ontario and the Golden Horseshoe continue to experience some growth within the category, purchasing slightly more wine than they did last year. Other regions remain relatively flat.
- ❖ The average purchase price of a bottle of wine is also consistent with the past two waves.
- ❖ While country of origin is still important in consumers' purchase decisions – it has not changed in importance since tracking began.
- ❖ Ontario wine consumers have a high awareness of Ontario being a region that produces high quality wine.
- ❖ Top-of-mind unaided results are strong, with consumers mentioning Ontario as a high quality wine producing region just as frequently as France. Consumers also state they are very familiar with Ontario wine – consistent with previous waves.
- ❖ Over two-thirds of wine consumers have made a recent purchase of Ontario wine, representing about one-third of all the wine they have purchased. This is consistent with previous waves of research.
 - ❖ The Golden Horseshoe always has been, and continues to be a large driver of awareness, familiarity and purchases. While the GTA, Ottawa and Southwestern Ontario consumers are in line with the rest of the province.
- ❖ Ontario wine consumers continue to feel most loyal to Ontario wine. They are also likely to purchase it in the next three months, and it continues to be the region they are most likely to purchase.
 - ❖ Of those that are unlikely, they are turned off by the perception that Ontario wine does not offer the value for money that other wine producing countries do, or there is another type of wine they would



Brand Positioning

- ❖ Overall, Ontario wine rated favourably, and on par with France and Italy in terms of consumers' overall impressions of the wines from each region
 - ❖ Positive ratings are driven largely by the fact that it is a local product and consumers want to support a local product. The appeal of "local" dipped in 2012, but has returned to previous levels. Other reasons include perceptions that it is good quality, good taste/flavour, and they like the variety. Unfavourable mentions are largely around those who feel the wine is of poor quality and/or they don't like the taste.
 - ❖ Impressions consistent with each region – Golden Horseshoe continues to rate Ontario wine more favourably, and Ottawa continues to rate it least favourably versus other regions, although there has been some recovery in this market.
- ❖ Wine consumers in Ontario largely feel that Ontario wine is for people like them, is a wine they'd recommend, and provides good value for their money. It is rated high, but on par with other regions for winning awards, being great tasting and having a wide variety. France is rated stronger for being high quality.
 - ❖ These impressions are very stable over last wave, with giftability of Ontario wine showing a slight increase.
- ❖ Ontario wine is continued to be viewed as a social, down-to-earth and environmentally friendly type of wine – in line with recent marketing efforts. A contrast to French wine which is viewed as being knowledgeable, a leader, and sophisticated.
 - ❖ Perceptually, Ontario wine has a similar profile to Californian wine.
- ❖ As with previous waves, Ontario wine consumers have a high level of pride in Ontario wine. Pride continues to be strongest in the Golden Horseshoe.
 - ❖ The level of pride is generally stable across all regions.



Key Challenges from Results

- ❖ Ontario wine continues to enjoy a dominant position in the Ontario marketplace, however it does face several challenges:
 - ❖ Wine purchasers from the Ottawa region have the highest level of past four week wine purchases; however, they continue to rank behind other regions on several key metrics for Ontario wine, including loyalty, share of wine purchased and overall impression.
 - ❖ Amongst wine drinkers who are unlikely to purchase Ontario wine in the next three months, cost/price has emerged as a larger barrier than in past waves, with twice as many people stating that 'imported brands are better for the same price' than last wave.
 - ❖ Furthermore, perceived poor value for the money was more likely to be citing as a reason for giving Ontario wine a negative rating.
- ❖ As with past waves, Ontario wine continues to lag France on perceptions of high quality wine (a driver of brand affinity) and giftability.
- ❖ Familiarity with most Ontario wine-growing regions continues to be flat year-over-year, with the exception of Prince Edward County which has seen some growth.
 - ❖ Visitation in the Golden Horseshoe is up significantly.



Implications from Research

❖ If the marketing efforts want to continue consolidating the position of Ontario wine vis-à-vis relevant competition, the following should be considered:

- ❖ Ontario wine consumers claim to be most loyal towards Ontario wine; however, share of Ontario wine continues to remain lower than it was in 2011, with minimal rebounds seen this wave from the low shown in the 2012 study. **This underscores how competitive other international wine categories have been in Ontario.**
- ❖ **Continue to focus marketing efforts on areas outside of the Niagara region, especially GTA and Ottawa, to help bolster awareness, and in-turn, increased sales of Ontario wine in these regions.** Specific areas of consideration should be in the Ottawa region, and the Rest of Ontario.
- ❖ Recent marketing efforts towards making Ontario wine a more social, and down-to-earth persona appears to have helped differentiate the brand from other regions. These points of differentiation should continue to be leveraged.
- ❖ Ontario wine has held ground on a key driver of brand affinity, being great tasting, so marketing efforts should continue to emphasis this, along with being high quality which is currently held by French wine. **Ontario wine isn't far behind, and just needs to validate the level of quality they have to consumers.**
- ❖ While origin continues to be a important in purchase decisions, albeit less than last wave, **Ontario wine could continue to benefit from 'local' marketing messaging – reminding consumers they are purchasing wine to support local growers and wine producers. This local feeling is also a key reason why many like, and currently purchase Ontario wine. This needs to be balanced with the quality drivers identified in the research.**



Key considerations in developing of the Plan

OTHER KEY INPUTS



Social Media – Key Insights

- ❖ Wine consumers are very active on social media channels on the weekend, when wine and travel are top of mind. Over the past year, we have increased our content to 365 days a year and have seen very strong engagement on weekend posts and a noticeable increase in followers in both Twitter and Facebook.
- ❖ Consumers respond very well to highly visual content including images and videos and this type of content continues to be very important to keep followers engaged in all channels.
- ❖ Social media sees noticeable and positive results when integrated in all marketing and PR activities. It helps us maximize reach and engagement with consumers and key influencers.
- ❖ Facebook paid advertising makes a significant contribution in growing our Facebook fan base and reach more consumers. Paid advertising is required to enhance organic growth .
- ❖ Twitter has launched new advertising opportunities which should be considered for further growth in this channel.



Social Media – Key Insights

- ❖ By leveraging existing partnerships, content and a diversity of story tellers we have amplified our social content and ultimately maximized our social media investment.
- ❖ Regular updates and communications with Ontario wineries helps activate industry in supporting Wine Country Ontario social media efforts and conversations.
- ❖ There is an appetite for a Wine Country Ontario presence on Instagram and this platform is an ideal one to showcase the beauty of the region and the wineries. In September 2013, we launched an official Wine Country Ontario presence on Instagram. In under 3 months, we have attracted 277 followers and share visually engaging content 3 to 4 times per week, mostly highlighting images from the wineries.
- ❖ Reviewing impact of key influencers via Traackr will provide us insights.
- ❖ We communicate regularly with wineries on social media efforts but recommend reviewing ways measure winery participation in our social media efforts



Experiential – Key Insights

- ❖ After a competitive process, a new supplier was selected to develop a new approach to experiential contact with the consumer. This program has at its core a branded food truck that is the anchor for the programming
 - ❖ Visually the truck is an exciting asset and creates lots of interest from consumers at events. Initial activations at consumer shows had guests lining up waiting to enter.
 - ❖ The truck has raised interest of other stakeholders, and events to arrange for truck at their events. The excitement is the truck and strategic partnerships are being explored.
- ❖ Initial executions and the supplier feel that using the truck as the main feature of the space, having it parked at an event for multiple days is not the best use of the asset.
 - ❖ Recommend using the truck in quick setups in unexpected locations that will raise awareness, create excitement for consumers and allow sampling of Ontario VQA wines to more consumers – where they least expect us.
- ❖ Import versus Ontario concept has been tested and changes recommended.
 - ❖ The IMC concurred with the recommendations of the team that the Imports vs Ontario concept for tasting are not driving results that would support extending the approach and therefore might not be the best use of the budget and space moving forward.
- ❖ Inclement weather at events is a concern and with the truck as the setting allows for more sampling inside the truck to reach more consumers.



LCBO Programs – Key Insights

❖ Taste Ontario Partnership with Vintages

- ❖ The Taste Ontario events the past few years have seen a decline in number of tickets sold. As many more events are being coordinated by VINTAGES and other winery/regional groups, the market is getting saturated, consumers are only attending so many events therefore they are looking for events that are new and different.
- ❖ In 2013, we added an intense level of advertising and promotion of the events, offered online tickets purchase option which sold 50% of the tickets but we still did not meet our goals for ticket sales.
- ❖ Toronto is still viewed as a must do event
- ❖ There are other opportunities for the industry to connect with the consumer in a taste and buy format
- ❖ Ottawa should be considered every other year.
- ❖ Wine Country Ontario should work with Vintages to try smaller format events in line with their current approach as an alternative



Export Insights

- ❖ Exporting Ontario wines raises awareness and supports long term economic sustainability for participating wineries. Icewine is currently the #1 exported wine from Ontario but table wine continues to gain interest abroad.
- ❖ The marketing plan supports the efforts of the Canadian Export Strategy which brings together a collaborative group from government, wineries and associations to build and contribute to an annual export strategy.
- ❖ Investing in this channel helps us to shape influencers (media, sommeliers and distributors) opinions and perceptions while raising the awareness and image of Ontario VQA wines in international markets.
- ❖ A vital component of creating ambassadors internationally is to provide them with an opportunity for an in-market experience to get to know producers, the people and the country. In-bound trade and media missions are excellent ways to connect and build long-term relationships.
- ❖ 3rd party endorsements from top international wine media are invaluable in export markets and has a positive effect on influencers and consumers in our home market.
- ❖ Quality communications pieces (printed, online and presentations) are essential for Ontario wineries, distributors and government partners so that they can work to tell our story in a consistent and meaningful way.
- ❖ Having government and industry work together by pooling resources and aligning strategies is beneficial in order to maximize efforts and success.
- ❖ Supporting the Canadian Wine Initiative is important so that Ontario VQA wine is showcased across the globe by Canadian posts.



Tourism Tools – Key Insights

- ❖ Research has shown that:
 - ❖ 50% ranked Wine Country Ontario website at top source for trip planning information followed closely by Food and Drink at 47% and Travel Guide at 34% (*2013 Ad Campaign Assessment – Innovative Research Group*).
 - ❖ Golden Horseshoe showing as the highest visitor to wine country with slight drops in GTA and other regions – focus on GTA, Ottawa and Rest of Ontario to drive traffic. (*2013 U&A Study – Vision Critical*).
 - ❖ The average wine country traveler does 21 activities, with 72% dining in restaurants, 48% shopping and 39% staying overnight in Wine Country (*2013 Ad Campaign Assessment – Innovative Research Group*).
- ❖ Our tools can have a more powerful reach if we utilize and leverage other activities to extend the reach of Tourism tools through Social Media, Public Relations, Experiential and Retail Growth activities.
- ❖ Ensure our tools are telling a story in a stronger way about Ontario as a world-class wine region and ensure stronger messaging around VQA/place to improve the performance of the tools as part of an integrated program.



VQAO Positioning

- ❖ In partnership with Wine Country Ontario, the VQAO has embarked on revamping its consumer facing communications and approach
- ❖ Working with our Agency of Record, the VQAO Board has been leading an initiative to have a more “retail” approach to the communications and positioning on appellation and the meaningfulness of VQA
- ❖ The tagline and paragraph below set the tone and outline the concepts behind wines of origin. It is the hope of the VQAO that these words will be the anchor point for the overall VQA message and a common starting point to elaborate on each appellation and sub-appellation for those who want to know more.
 - ❖ TAGLINE: **Taste the Place**
 - ❖ Key messaging: **VQA is about *place*. *Special* places right here at home. Places like nowhere else in the world. Where the soil, the slope, the sunshine, the warmth, the rainfall and the craftsmanship all *matter*. Together, they give us better grapes. And better grapes give us better wine.**
- ❖ **IMPLICATIONS** - Their retooling of their messaging will have implications for the plan in that:
 - ❖ Educational materials will need to be reviewed and revamped in line with the core consumer positioning. This would include all audiences – winery, media, LCBO staff, educators
 - ❖ The positioning needs to be considered in developing the approach to key executions like advertising, experiential interactions with the consumer etc. This does not mean a literal integration, but it does mean that most, if not all, of what this Plan proposes will “speak” to this approach or a consideration of this key messaging and the goals of the VQAO



LCBO Working Group & Research

- ❖ In response to sales for VQA not meeting plan, the LCBO has established a working group with industry leadership to identify issues and develop action plans to address these issues.
- ❖ At their initial meeting, the LCBO presented materials that summarized an extensive piece of customer research that they completed with respect to VQA consumers in store.
- ❖ The insights from this research, combined with the insights from the Usage and Attitude Study, will help inform the approach on many of the key tactics and shared goals that we have. These insights, which focus primarily on shopping patterns and purchase decisions, include:
 - ❖ Customer confusion on what products to select – ie. Varietal, region - though some interest in trying to understand
 - ❖ Bad experiences with VQA wines in the past
 - ❖ Lack of understanding about how the wines might compare to the imports they already drink
 - ❖ Low interest in or credibility for the many marketing programs associated with this area
 - ❖ Confusion due to the fact that the products aren't merchandised in the same way as others in the store
 - ❖ Positioning of the VQA fixture at the front of the store does not optimize the consumer entering/shopping the VQA section
- ❖ **IMPLICATIONS:** This research, in tandem with the results of the U&A study, indicate an opportunity to improve the message of programming around quality and place to support sales and customer interest. In trying to align and integrate activities to maximize this objective, this plan must try to address these issues at a macro level and look to the working group to address the in-store activities on a micro level





Ad Tracking Results and Insights

- ❖ As has been done every year, our advertising has had consumer research done to determine the efficacy of the program and to provide insights to the Plan going forward on approach to this key tactic
- ❖ Overall results were strong:
 - ❖ A **third (31%) of target consumers in the GTA** say they recall seeing the *Wine Country Ontario* campaign.
 - ❖ Regionally, campaign recall is higher among those who live in **Toronto (39%)**, higher even still among those who **work in Toronto, but live in the GTA (40%)**.
 - ❖ Nearly a half **(47%)** of those who work in Toronto and use public transit to get to work recall the ad campaign.
 - ❖ Campaign recall highest among **younger females (18-34 years) at 50%**.
 - ❖ Overall, among target consumers in Toronto, **32% recall outdoor ads, 15% recall print ads, 5% recall social media ads** (Facebook and Twitter campaign).
 - ❖ Overall, outdoor campaign recall among **target consumers in Toronto was 32%**, up from **26% in 2012, 22% in 2011 and 18% in 2010**.
- ❖ Typically, outdoor campaigns yield anywhere from 5% to 15% awareness among the general public – depending on the topic, the creative and the total ad buy



Ad Tracking Results and Insights

❖ Impression of Ads:

- ❖ Almost all respondents who saw the ads were left with a favourable impression and found the ad imagery appealing.
- ❖ Nearly half (47%) who saw the ads understood the message was about the “experience”; while most of the remainder had positive takeaways.

❖ Reported Campaign Impact

- ❖ **Reported Impact of Ads:** Nearly 6-in-10 (59%) of **Toronto target consumers** who were exposed to the Wine Country Ontario campaign say they are more likely to visit Ontario’s wine country after seeing this ad.
- ❖ **Cross Channel Promotion:** for respondents who were exposed to both the outdoor ads as well as print and social media, the complementary impact on reported likelihood to visit Ontario’s wine country increases significantly among the **GTA target consumers** (62% overall vs. 78% who saw outdoor + print/SM).

❖ Observed Campaign Impact

- ❖ Significant difference among those who recall the ads AND those who didn’t on likelihood to visit wine country.
 - ❖ 58% of those exposed the ad campaigns are more likely to say they’ll “definitely” or “very likely” to visit an Ontario winery in the next 12 months. Only 32% of those **NOT** exposed the ad campaigns are more likely to say they’ll “definitely” or “very likely” to visit an Ontario winery in the next 12 months.
- ❖ This suggests the campaign has had an immediate impact on consumer behaviour and likelihood to visit Ontario’s wine country.



Ad Tracking Results and Insights

❖IMPLICATIONS:

- ❖The approach works to drive results, now lets look at what the goals are for the program . Though extremely successful as demonstrated by research, the past few years have focused on the tourism message. There have been significant successes in driving consumer behaviour with this tactic. The question that has been answered within this plan is whether this approach could be retooled to focus less on tourism directly, and more on a broader more far reaching message that could be less directed towards a point in time where the market is saturated with tourism advertising, and more to a higher level message that could be deployed more broadly across the calendar and in a way that is complimentary to both the tourism needs of the industry and the goals to elevate the quality/connective properties that we know motivate the consumer
- ❖ The research has also shown that some of the new advertising tactics, particularly those within transit are extremely impactful on the consumer. The agency should and will be challenged to articulate a new strategy within the budget framework that focuses on the techniques that are the most successful and impactful and balance that with a desire, if possible, to stretch a campaign across the year.



Public Relations Insights

- ❖ PR initiatives continue to be a key driver for success in persuading the public, partners, stakeholders and many influencers including the media to maintain certain points of view about Wine Country Ontario and its products.
- ❖ PR activities should maximize its communication via all channels including social media and should be integrated into everything that we do. PR activities help drive social media results and works to amplify all marketing efforts.
- ❖ A strong communication plan helps us share our story while maintaining the communication of consistent and key information - “One voice, one message”. Initiatives such as the Wine Country Ontario: Our Story white booklet continues to be an invaluable communication tool used by wineries, media, educators and export markets.
- ❖ Communicating with different types of traditional media and bloggers (travel, lifestyle, wine, business) is important for a stronger reach in diverse communities creating increased opportunities to reach consumers across a broad range of outlets.
- ❖ Hosting media/influencers in wine country on FAMS and also at key events are both important for showcasing both experiences and product. Results in positive 3rd party credible endorsements. Hosting them around key events (Ex. i4c, Icewine Festival, Cuvée, Riesling Experience) is beneficial.



Public Relations Insights

- ❖ Building relationships with media & influencers are important in both domestic and key international markets in order to raise awareness of Wine Country Ontario as a producer of quality wine and wine country experiences while educating about our appellations.
- ❖ Hosting key international wine media and influencers is a PR initiative with long-term halo effects with high gain opportunities. Impressions and resulting media coverage is important for both consumers and is also influential with other influencers such as product consultants at the LCBO. We harvest quotes from media and strategically share these 3rd party accolades with influencers and consumers in our home market. (Ex. Steven Spurrier and Jamie Goode articles.)
- ❖ Building relationships with media is important for success of our PR efforts. Face to face relationship building continues to build the strongest relationships with the best results.
- ❖ Leveraging PR from key activities has shown success via increased media coverage . Examples include: Advertising Campaign, Lieutenant Governor Awards, LCBO P7 Promotion.



Grape Growers of Ontario Travel Tool

- ❖ As the IMC was made aware, the GGO has recently launched its own mobile-enabled website. A letter was received from the GGO indicating that they would be prepared to lend this asset to the Wine Country Ontario Program.
- ❖ The IMC will review the opportunity and has provided these insights to the discussion:
 - ❖ The www.winecountryontario.ca site already is enabled for mobile and has all of the functionality of this site. We should not be duplicating what already exists.
 - ❖ The plan calls for the development of a mobile app (which is different) to compliment the existing Wine Country Ontario assets. The assets must be completely integrated so the discussion must note that one site needs to be the source for this app.
 - ❖ The GGO site has gone more broadly and included wineries that are not producing VQA wines. The Marketing Funding is for VQA wines only.
- ❖ A meeting will be scheduled at the earliest opportunity to assess the capacity of each offering and report will be made back to the IMC for their consideration.



What will this plan do? And how will we do it?

MARKETING STRATEGY



Overarching Approach

❖ Integration at every touch point

- ❖ PR, Social Media, VQAO messaging, other programming to be considered with every execution
- ❖ No program should operate in a silo – our programs work harder and smarter when they work together more effectively – our planning process has focused on ensuring that this happens
- ❖ New VQAO approach to communications/education must be made a priority and programs and core communications products retooled appropriately
- ❖ Ensure our other tactics always drive to online/social media assets

❖ Industry investments must be leveraged to keep the Marketing Program whole

- ❖ Now is not the year to diminish the level of industry investment – elements need renewal not cutbacks at a critical time for VQA wines and the industry in our marketplace

❖ Work to drive more opportunities to integrate our efforts with retailing wine at LCBO and Cellar Door

- ❖ Investments in LCBO need to continue and be focused on key selling periods
 - ❖ Plan for investment in the current status quo suite of opportunities and allow for emerging opportunities that may be incremental to the usual executions
- ❖ Investments need to continue to be strong on our strongest tourism tools – guide and website
 - ❖ Research shows that they drive results
 - ❖ Ensure that they are working at their maximum for the consumer and in an integrated way with all of our programs
 - ❖ Year round focus to drive traffic to wine country – advertising focus online



Overarching Approach

- ❖ Retool programs that are not going to drive optimal results and try a new approach
 - ❖ Vintages events, consumer shows, experiential all merit discussion and have generated recommendations for amendment or change
- ❖ Partnerships considered for all programming where possible
 - ❖ Complementary initiatives across the tourism sector could be driving better results if they were done on a partnership basis with the industry and other partners
 - ❖ FeastON (licensee recognition), RTO marketing of Wine Country travel
 - ❖ Our programs can drive higher returns from our investments with partners that can extend our reach
- ❖ Use the final year of this marketing cycle to reflect on performance and approach
 - ❖ Continue to build on benchmarking research (Usage and Attitude Study, Ad Tracking Pre and Post campaign)
 - ❖ Investment in deeper consumer research on the tourism side to guide our approach moving forward
 - ❖ Investment in a 360° review of the current 5 year marketing cycle and use this as a foundation for a forward looking strategic discussion with all of industry at the table
 - ❖ This should include what we market, why and how



Key Strategic Pillars

Consumers First

Consumers will be at the heart of all events, tastings, sponsorships, social media. We will deliver the best consumer brand experiences to build loyalty.

Deliver consumer experiences & engaging content

Build Loyalty on a broader level.

Give consumers reason to choose us more often.

Tourism Leadership

World class execution and consumer engagement that inspires, drives pride, consideration & travel.

Build Consumer Loyalty, Pride & Travel.

Economic Sustainability for wineries

Leverage & Build Partnerships

Educational Excellence

Provide knowledge and meaningful information on a broad level to build image, affinity, brand ambassadorship and category uniqueness.

Build VQA Understanding of origin

Tell our Story & differentiate the category.

Build Ambassadorship

Retail Growth

Maximize opportunities for distribution, promotions, staff & management engagement and brand communication through key 3rd parties partners to drive industry growth

Image & Quality

Purchase Intent

Go Beyond Local



Strategy, Tactics and Budget by Program

CONSUMERS FIRST



Consumer Research – Objectives & Strategy

❖ Objectives

- ❖ Invest in research that strengthens our marketing and tourism knowledge and leadership
 - ❖ Benchmark performance and measure brand health movement
 - ❖ Strengthen our ability to place the consumer at the heart of everything that we do by having access to relevant consumer knowledge and facts that enable us to make informed and objective marketing decisions.

❖ Strategy

- ❖ Conduct an annual Usage and Attitude study to measure change in consumer perception, attitude, behavior, purchase intent and VQA comprehension and understanding
- ❖ Annual ad tracking study to track and rank program effectiveness, specifically awareness, recall, comprehension and impact. Pre and Post campaign research investment this year (previously only post to manage costs) - **NEW**
- ❖ Conduct a deep dive research into tourism visitation to better define trends & behaviours - **NEW**



Program Research – Objectives & Strategy

❖ Objectives

- ❖ As the current 5 year marketing program is in its final year, it is critical that the industry be able to take an objective look at the approach of the industry marketing
 - ❖ Drive from a place of reflection and ensure that the industry can have concrete recommendations and pillars to build on for the next 5 year iteration of the program.

❖ Strategy

- ❖ Conduct a 360° review of the current 5 year marketing cycle and use this as a foundation for a forward looking strategic discussion with all of industry at the table - **NEW**
 - ❖ This should include what we market, why and how
 - ❖ Completion of the exercise early in the current plan (4-5 months from plan approval)



Consumer Research/Program Research

Activity/Programming	Current Plan Budget	Proposed Budget
Ad Tracking Study (Pre and Post 2014-2015 vs Post only 2013-2014)	\$ 20,000	\$40,000
Usage & Attitude Study	\$50,000	\$50,000
Environmental Program	\$5,000	\$5,000
360° Review - NEW	\$ 0	\$50,000
Tourism Deep Dive - NEW	\$ 0	\$25,000
Totals	\$75,000	\$170,000

Key Performance Measures

- ❖ Raising quality credentials with the consumer vs last year
- ❖ Awareness of place, VQAO metrics
- ❖ Recall, impact, understanding, intent metrics for advertising



Social Media – Objectives and Strategy

❖ Objectives

- ❖ Raise the awareness and image of Ontario wines and wine country by deepening the emotional attachment with key target consumers and influencers through social media channels.
 - ❖ Strengthen the perception of Ontario wines as being high quality and a leader.
 - ❖ Engage audience by educating and entertaining.
 - ❖ Inspire consumers to visit wine country and discover Ontario wine regions as travel destinations of choice.

❖ Strategy

- ❖ Bring Wine Country to Ontario and Bring Ontario to Wine Country
 - ❖ Through our social media tools, we can bring a “virtual” wine country experience to Ontarians by educating and enlightening them about how wines taste, how it’s made, how they marry with local food and how they reflect the overall lifestyle of each region; inspiring discovery outside of wine country (restaurants, LCBO).
 - ❖ Equally important, are efforts around motivating Ontarians to visit wineries across Wine Country Ontario, driving tourism to the various regions, driving sales at on-site wineries and building the unparalleled brand loyalty that comes from an Ontario wine country experience.
 - ❖ Use social media assets to communicate renewed VQA messaging “Taste the Place” to consumers and key influencers



Social Media – Objectives and Strategy

❖ Strategy

- ❖ Sustain and build fan base with fan acquisition programs; strategic advertising that delivers high ROI, influencer relations & program activations. New VQA messaging to be integrated into these efforts. **NEW**
- ❖ Populate Wine Country Ontario's Facebook Timeline with key industry milestones and events as well as winery specific milestones to educate consumers on the history and quality of Wine Country Ontario.
- ❖ Conduct a thorough online influencer audit using agency's Traackr tools to build three lists of influencers in wine, food and travel industries. **NEW**
 - ❖ These list swill allow us to stay engaged with key influencers, foster relationships and expand our overall social reach to new audiences.
- ❖ Continue **Wine Country Ontario 365**: providing engaging social content on a daily basis to fans.
- ❖ Update annual editorial calendar to leverage key activities in wine country, holidays and special occasions where we can naturally integrate VQA wine into these celebrations. Continue to feature regions, wineries and wines to educate and drive interest in the diversity of the Ontario wine industry.
 - ❖ Raise awareness of key events and activities that get consumers into wine country more often
 - ❖ Raise awareness of how consumers can connect with VQA outside of wine country (restaurants and the LCBO).



Social Media – Objectives and Strategy

❖ Strategy

- ❖ Continue to focus on the three main social communities where we have been successful at fan acquisition, engagement and influencer amplification; Facebook, Twitter and most recently Instagram and a newly launched monthly consumer e-newsletter..
 - ❖ Focus on partnership integration to diversify content and maximize investment.
 - ❖ Continue to leverage visuals from wineries as well as our own to create engaging content.
 - ❖ Continue to grow the Instagram community by integrating more Instagram focused contests and promotions and review this new channel closely.
 - ❖ Continue to grow e-newsletter consumer database
- ❖ Continue regularly scheduled Surprise and Delight themes and contests to promote existing Wine Country Ontario events and offer unique experiences to award fans and keep them engaged.
 - ❖ Leverage and engage wineries.
 - ❖ Develop and maintain strategic partnerships with other brands, media, social influencers and content channels to reach new audiences. I.e. fashion and beauty influencers, Maclean's, Visa and LCBO.
- ❖ Further integration with marketing & PR initiatives to deliver messaging to consumers through multiple touch points to increase resonance and impact. Focus on experiential truck in particular **NEW**



Social Media

Activity/Programming	Current Plan Budget	Proposed Budget
Program planning & management, quarterly planning meetings, bi-weekly calls, administration	\$20,000	\$18,000
Plan execution (WineCountryOntario 365)	\$41,000	\$36,000
Monitoring and channel management – Facebook, Twitter and Instagram	\$64,800	\$71,000
Traackr Influencer Audit	\$4,200	\$2,000
Facebook Ad Buys	\$10,000	\$15,000
Totals	\$140,000	\$142,000

Key Performance Measures

- ❖ Growth in engagement across all channels
- ❖ Strong performance versus competitors for share of throat
- ❖ Integration of social media with other programming



Experiential Tasting Program and Sponsorships

❖ Objectives

- ❖ To raise top of mind awareness and image of Ontario VQA wines with core target consumers through engaging sampling events that educate and drive trial
- ❖ Improve quality and leadership perceptions
- ❖ Go beyond the local benefits and bring to life the elements that make our wines special and further build category differentiation.

❖ Strategy

- ❖ Create program to showcase and sample Ontario VQA wines across key markets with sampling opportunities least where consumers expect us.
- ❖ Aggressively leverage the use of the Wine Truck to create a visually appealing setting for sampling Ontario VQA wines **NEW**
- ❖ Provide sponsorship and co-ordination of events that align with our strategy and add value for the Wine Country Ontario brand, drive tourism, and add value for Ontario wineries in key regions such as i4C, Niagara Wine Festival, Ontario Wine Awards, Cuvee etc.



Experiential Tasting Program and Sponsorships

❖ Strategy

- ❖ Dare to Compare Ontario VQA sampling program – Experiential Road Show concept – **NEW**
 - ❖ 18 week tour – April 30-Sept 1, 2013
 - ❖ Tues – Sat or Wed – Sun
 - ❖ GTA, Cottage Country, Ottawa, London, and others
 - ❖ 3-4 retail shop/week
 - ❖ 2-3 curbside, public spaces, office per week
 - ❖ 4 festival activations
 - ❖ 1 signature Pop-Up event
 - ❖ 90 days of activations
 - ❖ Sample range of 43,500 – 52,000
 - ❖ Goal to sample test at Collingwood and select LCBOs in early 2014.
 - ❖ Non-sampling event capabilities for consumer engagement, VQA communication messaging, education, social media participation and contest entries – all aimed to drive winery visitation.
- ❖ Integration of engagement with consumers to drive traffic to wineries in Ontario through follow up emails, and online activations – **NEW**



Experiential Program and Sponsorships

Activity/Programming	Current Plan Budget	Proposed Budget
Experiential Programming	\$220,000	\$220,000
i4c	\$25,000	\$25,000
Sponsorships – Consumer/Trade Related	\$40,500	\$40,500
Totals	\$285,500	\$285,500

Key Performance Measures

- ❖ Number of executions
- ❖ Consumers sampled
- ❖ Results from online registration and consumer contact
- ❖ Consumer engagement at events
- ❖ Event performance against goals of raising quality credentials



Strategy, Tactics and Budget by Program

TOURISM LEADERSHIP



Advertising

❖ Objectives

- ❖ Raise awareness and image of VQA wines and Wine Country Ontario with key target consumers living primarily in Toronto GTA and Ottawa.
- ❖ Create emotional engagement and loyalty.
- ❖ Motivate tourism through a linkage to “Place” (appellation)

❖ Strategy

- ❖ Shift to raising the Quality image as the key overall objective for the advertising campaign – **NEW**
 - ❖ Quality and value are key consumer drivers and must drive the investment
 - ❖ Tourism, sales and awareness do not work independently of each other. The committee agreed with the concept and felt that a broader message would be able to boost both sales and tourism
 - ❖ Focus advertising on tactics with highest recall – **NEW**
- ❖ Test campaign effectiveness with Pre and Post campaign studies (see Research)
- ❖ Extend breadth of advertising campaign, if possible, to extend reach of the quality/place messaging with consumers throughout the year
- ❖ Leverage opportunities to extend reach of campaign through partnership with Regional Tourism Organizations or other appropriate partners



Advertising

Activity/Programming	Current Plan Budget	Proposed Budget
Media Buying and Agency Fee	\$680,000	\$680,000
RTO Engagement Program	\$20,000	\$20,000
Totals	\$700,000	\$700,000

Key Performance Measures

- ❖ Advertising impact
- ❖ Elevating quality and place parameters in eyes of consumer
- ❖ Integration with other executions (travel tourism tools, social media, LCBO programming and approach)



Wine Country Ontario Travel Guide, Website & Signage

❖ Objectives

- ❖ Build on world-class tourism tools and experiences that position Wine Country Ontario as a top desirable travel destination
- ❖ Motivate Travel to wine country by utilizing the go-to website, mobile site and travel guide
- ❖ Maximize industry participation in the program
- ❖ Have the tools work harder as stand alone pieces
 - ❖ With focus on advertising not overtly at travel, guide distribution and promotion must be extended to target reach to key audiences including online advertising of assets.

❖ Strategy - Overall

- ❖ Refresh travel guide and website for best user experience and visually compelling travel reference guide.
- ❖ Showcase the adventures and personal experiences that consumers can find in wine country. Give them more reasons to visit.
- ❖ Year round focus to advertising and promotion of Guide in other media/mediums - **NEW**
- ❖ Grow advertising in ancillary listings
- ❖ Continue to distribute guide within Ontario via Food & Drink, at wineries, OTMP
- ❖ Promote via online to extend reach in US and Ontario – **NEW**
- ❖ Collaborate with industry to create consistent, one-voice, primary source for wine country travel
- ❖ Ensure a web-only presence for new “tourism ready” wineries with appropriate investment from the wineries and engagement in evaluation tools and training – first time participants only



Wine Country Ontario Travel Guide, Website & Signage

❖ Strategy – Travel Guide

- ❖ Refresh imagery, copy and content
 - ❖ Focus on VQA and appellation communication and messaging – Taste the Place
- ❖ Develop Sun Country Highway program for Electric Vehicles and support in guide for participating wineries. **NEW**
- ❖ Print using environmentally friendly paper and printer
- ❖ Increase Advertising of businesses that enhance the wine touring experience such as accommodations, dining, shopping.
- ❖ Distribution in Food & Drink – all Ontario, wineries and OTMP. Increase print copy by 50,000 to meet the need of distribution channels (total print run of 700,000). Stand-alone map insert into Macleans Magazine as part of our strategic partnership
- ❖ Online promotion of Travel Guide launch into US border states (FoodandWine.com) to extend the reach to visitors from outside Ontario. **NEW**
- ❖ Promotion through social media channels with ad buys on Facebook and other **NEW**
- ❖ Develop complementary new tools/collateral to drive to Tourism tools for executions such as experiential truck activations, tasting opportunities, tasting rooms - **NEW**
- ❖ Design inserted map as a stronger stand-alone piece. **NEW**



Wine Country Ontario Travel Guide, Website & Signage

❖ Strategy – www.winecountryontario.ca

- ❖ Refresh imagery and content to align with Travel Guide
- ❖ Interactive digital version of guide for download - **NEW**
- ❖ Continue to monitor page visitation to ensure content is easy to find, relevant and ensure ease of updating for participating wineries – consolidate content for better user experience.
- ❖ Invest in online promotions, ad buys to increase website traffic - **NEW**
- ❖ Look at augmenting mobile enabled features of website with development of complimentary stand alone app – **NEW**
- ❖ Redesign of mobile version of site to ensure it fits the needs and expectations of users - **NEW**

❖ Strategy – Signage

- ❖ Maintain Wine Route Signage and Area Profile signs in Niagara's, PEC's and LENS regions.
- ❖ Regional collaboration for Wine Country with LENS, South Coast and PECWA
- ❖ Sub appellation signage – design and create assets for individual purchase by growers and wineries - **NEW**



Wine Country Ontario Travel Guide, Website & Signage

❖ Strategy – Other Program Elements

- ❖ Consumer Eblast – continue monthly eblast to consumers highlighting events and news from Wine Country
- ❖ Commission in-market wine country visitation study during spring, summer and fall 2014 - **NEW (see Research)**
- ❖ Food and Drink advertising focused on drive to website and year-round visitation - **NEW**
- ❖ Photography – re-evaluate inventory and prioritize photos required for year-round use and at appropriate quality for multiple use. Timing of shoots scheduled for Spring, Summer, Fall and Winter to ensure access to the best images – **MULTI** year license and use for all photos. – **NEW**



Wine Country Ontario Travel Guide, Website & Signage

Activity/Programming	Current Plan Budget	Proposed Budget
Travel Guide Production *	\$437,500	\$417,000
Travel Guide Distribution	\$ 75,000	\$ 177,000
Website Evolution	\$ 60,000	\$ 50,000
Photography	\$ 30,000	\$ 20,000
Signage Maintenance	\$ 10,000	\$ 10,000
Totals	\$612,500	\$674,000

Key Performance Measures

- ❖ Performance of Tourism Tool specific ad initiatives
- ❖ Guide production and distribution
- ❖ Ad sales
- ❖ Winery engagement

* Note that travel guide production costs higher in current year due to government decisions at last minute of guide production processes last year



Mystery Shop and Retail Training

❖ Objectives

- ❖ Provide the consumer with a consistently exceptional experience at all wineries in Ontario.
 - ❖ The winery experience must remain strong to wow consumers to promote repeat visitation
- ❖ Continuous learning and improvement for winery staff
- ❖ Raise the bar on delivery of VQAO messaging around appellation

❖ Strategy – Overall

- ❖ Continue to evolve and build retail training program for wineries, addressing the gaps identified in Mystery Shop reports
- ❖ Ensure program meets the needs of all wineries whether large or small to allow for access and continuous improvement for wineries
- ❖ Focus and partner with VQA on appellation messaging check and education - **NEW**



Mystery Shop and Retail Training

❖ Strategy – Mystery Shopper Program

- ❖ Continue execution of 10 mystery shops per property per year conducted monthly during spring, summer and fall and every 6 weeks for winter months
- ❖ Monitor monthly scores to identify gaps
- ❖ Create monthly eblast content to Wine Country Ontario Wineries with tips and best practices for sharing with retail staff to extend the education, awareness and identified gaps in reports for continuous learning – **NEW**
- ❖ Recognize wineries that have achieved 80+ scores for 3 consecutive months – **NEW**

❖ Strategy – Retail Training

- ❖ Offer 2 levels of training with additional sessions to build on previous learning and provide continuous education
- ❖ Specific education added to all sessions on awareness and knowledge of VQA Appellations, level of understanding that VQA is about origin and authenticity, tools for selling skills to influence purchase – **NEW**
- ❖ Create tools that are usable for wineries for in-house training such as video training sessions for staff hires between training sessions – **NEW**
- ❖ Create program to track individuals through the Training programs similar to a Certification to encourage continuous learning, add credibility and engagement – **NEW**
- ❖ Create monthly eblast content in partnership with Mystery Shop with tips and best practices for onsite training and sharing of best practices – **NEW**



Mystery Shop and Retail Training

Activity/Programming	Current Plan Budget	Proposed Budget
Mystery Shopper	\$ 79,000	\$ 80,250
Retail Training	\$ 28,000	\$ 35,000
Totals	\$107,000	\$115,250

Key Performance Measures

- ❖ Winery scores in mystery shop
- ❖ Trends and improvements
- ❖ Specific improvements around communication of VQA message around Place
- ❖ Usage and engagement with tools



Strategy, Tactics and Budget by Program

RETAIL GROWTH



LCBO – In Store Programming

❖ Objectives:

- ❖ Deepen the loyalty of wine consumers and trigger purchase of VQA wines by amplifying and strengthening our quality and leadership credentials.

❖ Strategy

- ❖ Invest in promotional programming at LCBO to help differentiate the category and tell our story.
 - ❖ Note that Period 7 will not significantly change for Fall 2014
 - ❖ Any incremental programming or opportunities to invest on an industry basis will require a re-allocation of funds within the LCBO envelope
- ❖ Work with LCBO category leadership team to ensure strategic presence for core varietals, established brands, and other core elements that define our products.
 - ❖ Focus this effort within the parameters established with LCBO working group
- ❖ Make positive changes to improve Period 7 in alignment with industry recommendations and messaging
- ❖ Ensure LCBO is engaged in development of broader advertising strategy so that messaging and approach to build quality credentials are aligned
- ❖ Revisit the local messaging as a trigger for purchase based on U&A results



LCBO- WOW and Product Consultant Training Programs

❖ Objectives

- ❖ Provide wine country experiences and relevant educational content for key retail staff to create Ontario wine category management, marketing and the digital marketing team.
- ❖ LCBO staff are our on the floor ambassadors, ensuring they have experienced wine country, tasted the wines, met the people is all something that Ontario can offer so much more than imports. This is our greatest advantage.

❖ Strategy - Overall

- ❖ Engage all WOW Leaders, Product Consultants and select Store Managers with wine country visits and build in shared goals and accountability. (subject to LCBO budget availability)



LCBO WOW and Product Consultant Training Programs

❖ Strategy – WOW Leaders/WOW Tours

- ❖ Continue with WOW Leader tours to wine country
 - ❖ Goal to include all WOW Leaders
 - ❖ Goal to include all Product Consultants on tours – **NEW**
 - ❖ Spread out tours to allow for better planning, adjustments due to emergency cancellations, so participants can re-book on upcoming tour (April – September)
- ❖ Continuous Engagement through newsletters, regional events and every opportunity we have to engage with on-the-floor CSRs – **NEW**
- ❖ Rework components of tour and schedule to keep content fresh and minimize logistical problems that arise – **NEW**
- ❖ Continue to try to cross visit regions and extend the distance buses are traveling e.g. Ottawa to Niagara

❖ Product Consultant Annual Conference

- ❖ Continue to participate in Product Consultant Conference featuring a Winemaker Panel to discuss and focus on a key Ontario Varietal and showcasing additional wines with lunch
- ❖ Focus on VQAO messaging around Place
- ❖ Explore option for regional engagement opportunity throughout the year – **NEW**
- ❖ Continuous engagement through newsletter and regional events – **NEW**
- ❖ Continue to offer registration for Product Consultants at key industry events e.g. cuvee, i4C and more



LCBO - Period 7 in-store Tastings

Objectives

- ❖ Deepen the loyalty of wine consumers and trigger purchase of VQA wines by amplifying and strengthening our quality and leadership credentials
- ❖ Provide wine country experiences and relevant educational content for key retail staff to create Ontario wine category management, marketing and the digital marketing team.

❖ Strategy

- ❖ Continue to offer tasting program to support wineries during Period 7
- ❖ Complement with experiential tasting truck at select LCBO stores where possible
- ❖ Explore incremental tasting opportunities during other periods and budget for winery support
- ❖ Work with LCBO on allocation to ensure small wineries are able to book key stores
- ❖ Focus on top VQA stores



VINTAGES - Consumer Events

❖ Objectives

- ❖ Deepen the loyalty of wine consumers and trigger purchase of VQA wines by amplifying and strengthening our quality and leadership credentials

❖ Strategy

- ❖ Continue to work with VINTAGES on the Taste Ontario events in Toronto and *Ottawa*
 - ❖ This year create one event in Toronto as an Annual Event, make Ottawa an event every other year
 - ❖ Work with Vintages to support and try smaller, more intimate events in line with the approach taken with other suppliers
 - ❖ Adjust format to engage at a deeper and more personal level and focus on less consumers
- ❖ Consider developing a pay for play Taste and Buy event in Ottawa independently to ensure presence in Ottawa in alternating years



LCBO Programming

Activity/Programming	Current Plan Budget	Proposed Budget
LCBO – In Store Programming	\$417,000	\$400,000
LCBO – Tasting Program	\$65,000	\$ 75,000
LCBO – Wow and PC Engagement*	\$290,000	\$240,000
LCBO – Consumer Events	\$80,000	\$60,000
Totals	\$852,000	\$775,000

Key Performance Measures

- ❖ Sales performance
- ❖ Consumer engagement in events
- ❖ Conversion to sale on tasting programming
- ❖ Communication and education of store staff post training

* These dollars have been reallocated due to lack of opportunities for the last 3 years. Budget adjusted to reflect average spending.



Interprovincial

❖ Objectives:

- ❖ Enhance and create new opportunities for VQA wines in priority markets across Canada. Increase access for Ontario wines and sell more Ontario VQA wines outside Ontario.

❖ Strategy

- ❖ Drive awareness of the Ontario VQA category and spark interest and improve knowledge for our wines with market tours for inter-provincial liquor board executives.
- ❖ Engage all Liquor boards for strategic opportunities through CALJ
- ❖ Provide education/communications materials to all provinces for consistent messaging within markets. Distribute to key agents acting for VQA wineries in other provinces - **NEW**
- ❖ Support inbound Quebec influencer trip around i4c – July 2014 – **NEW**
- ❖ Partner with CVA around development of platform for liquor board events across Canada for consumer engagement (planning 2014, execution 2015) - **NEW**



Export

❖ Objectives:

- ❖ Build on the national export initiative.
- ❖ Drive awareness of Ontario VQA wine quality credentials.
- ❖ Build international ambassadors for Wine Country Ontario.
- ❖ Build international awareness of the qualities and assets of Ontario as a wine region

❖ Strategy

- ❖ Invest and participate in key inbound media and buyer missions from U.K., U.S. and Asia.
- ❖ Influence the influencers abroad via tastings & events –target key trade & media including Canada Media Marketplace
- ❖ Build on the investment of the Ontario Government in ProWein 2014 to support Ontario VQA at ProWein 2015.- **NEW**
- ❖ Leverage educational assets and communication pieces as appropriate for key markets. Update White Book and Canadian Wine Postcard with translations and VQAO messaging
- ❖ Continue to support the Canadian Wine Initiative by off-setting shipping costs for wines to ship to Canadian posts abroad. These wines are used to showcase VQA wine to an international audience by Canadian Ambassadors in those markets.
- ❖ . Continue to coordinate winery education and export readiness seminars in collaboration with government partners (DFAIT and OMAFRA).
- ❖ Review opportunities to support key international wine competitions that align with our strategy.



VQA Trade Engagement & Licensee Recognition Program

❖ Objectives:

- ❖ Raise image and quality perceptions within the licensee channel to spark pride, ambassadorship and trigger purchase.

❖ Strategy:

- ❖ Build on established success of Taste Ontario trade tastings in Toronto and Ottawa. Execute both events again this year
- ❖ Align licensee recognition program with new VQA messaging, the province's new FeastON program and the LCBO's GoLocal licensee initiative during P7. Work with OCTA to educate their on the ground ambassadors to assist in marketing the program and cross promote FeastOn in return - **NEW**
- ❖ Further animate partnership with Foodservice & Hospitality Magazine to reach and engage more licensees in the recognition program.
- ❖ E-blast communications to trade highlighting what's new in Wine Country Ontario and promoting new VQA messaging
- ❖ Promote recognition program during all relevant touch points with trade and increase benefits to licensees participating in the program.
- ❖ Outreach to trade associations to find opportunities to put Ontario wineries in front of licensee trade at association events. Seek out events that provide added exposure for Ontario wineries and wines
- ❖ Use PR and social media to promote program to consumers and deliver value to trade partners



Interprovincial, Export and Trade Programs

Activity/Programming	Current Plan Budget	Proposed Budget
Trade – VQA Recognition Program	\$20,000	\$20,000
Trade – Taste Ontario and Other	\$55,000	\$55,000
Interprovincial Activities	\$20,000	\$20,000
Export – Media and Buyer Missions	\$45,000	\$45,000
Export – Winery Education and Seminars *	\$0	\$2,500
Export – Communications Tools	\$10,000	\$10,000
Export – Canada Media Marketplace	\$10,000	\$10,000
Export – Canadian Wine Initiative		\$10,000
Export – ProWein		\$45,000
Totals	\$160,000	\$217,500

* These were done on a cost recovery basis this year. We hope to do same this coming year



Strategy, Tactics and Budget by Program

EDUCATIONAL EXCELLENCE



Sub Appellations Maps and Online Education

❖ Objectives:

- ❖ To take a leadership role in driving accurate and consistent wine education to students, trade and key influencers and consumers everywhere.

❖ Strategy

- ❖ Finalize online course with updated VQA messaging and approach for consistency
- ❖ Revise 3rd edition of printed course book to align with revised VQA appellations and messaging to create 4th edition
- ❖ Promote online course module to students, instructors, trade and winery staff as the go-to site for information and education on Ontario wine, appellations and VQA
 - ❖ Niagara College now relying on online content to deliver programming versus in class module
- ❖ Partner with colleges for instructor FAM tours to wine country so those instructors are well versed in Ontario wine industry
- ❖ Make sub appellations map available and accessible to consumers and trade.



Educational Excellence

Activity/Programming	Current Plan Budget	Proposed Budget
Sub Appellation Maps (updated)	\$ 0	\$ 5,000
Online Program and Promotion	\$ 10,000	\$ 10,000
Print Course Revisions	\$ 0	\$ 5,000
Totals	\$ 10,000	\$20,000

Key Performance Measures

- ❖ Course utilization
- ❖ Use of map by wineries



Strategy, Tactics and Budget by Program

PUBLIC RELATIONS



Public Relations

❖ Objectives

- ❖ Focus PR activities to support in a fully integrated way the goals of the Wine Country Ontario programs.

❖ Target Audiences

- ❖ Media from the GTA, national and international (wine, lifestyle and travel) including bloggers.
- ❖ Influencers including industry, stakeholders, government, trade and wine educators.

❖ Strategy – Overall Approach

- ❖ Raise awareness and image of Ontario VQA wine and Wine Country Ontario as a top travel destination with media, bloggers and influencers (wine, travel and lifestyle) primarily in Ontario and elsewhere (key international influencers).
- ❖ Strengthen understanding by media and key influencers of Wine Country Ontario's appellation story and unique terroir.
- ❖ Continue to grow the understanding and use of consistent key messaging about Ontario VQA wines and Wine Country Ontario by industry and stakeholders.



Public Relations

❖ Strategy – Overall

- ❖ Build on the successes of integrated messaging across all communication channels and further integrate and align PR efforts with social media in order to amplify reach for all marketing programs. (Guide launch, Advertising, Consumer Tastings with new truck **NEW**).
- ❖ Continue to build new and strengthen existing relationships with media and influencers.
 - ❖ Wine, lifestyle, food and travel; traditional media and key bloggers.
 - ❖ Host them in wine country on FAMS and at special events & tastings in key locations (Toronto, Ottawa)
 - ❖ Support editorial content on key publications (Maclean's).
- ❖ Develop new and strengthen relationships with key international wine influencers.
 - ❖ Support key international media and trade missions (strategy supported by national export program goals).
 - ❖ Host key media and/or influencers at key events. Plans are underway to secure a speaker for i4c 2014.



Public Relations

❖ Strategy – Overall

- ❖ Continue to work collaboratively with key stakeholders to leverage and stretch PR investments (OTMPC, CTC, Toronto Tourism, OCTA, and key Ontario RTOs and DMOs)
- ❖ Support key Wine Country Ontario led and also stakeholder led events to leverage PR (ex. Taste Ontario in Toronto & Ottawa, Cuvée, Terroir **NEW**, LCBO P7 promotion, i4c, Pan Am Games 2015).
- ❖ Enhance and develop communication tools (printed, media centre, photos, videos) to share with industry, media and influencers in order to strengthen consistency in messaging.
 - ❖ Focus on key messages: appellations, quality, local, top tourism destination, sustainable, core varieties, VQAO messaging
- ❖ Develop and pitch new story angles to gain new media attention.
- ❖ Attend key media networking events (Go Media, Canada Media Marketplace).
- ❖ Monitor media coverage and measure reach with MRP (Media Rating Points).



Public Relations

Activity/Programming	Current Plan Budget	Proposed Budget
Media Tours and Engagement	\$55,000	\$55,000
New PR Initiatives	\$44,000	\$44,000
Events/Radio/TV Programs	\$35,000	\$35,000
Media Monitoring	\$24,000	\$24,000
Media Training	\$5,000	\$5,000
PR Support for Tourism Initiatives	\$18,000	\$18,000
Contract Services	\$16,000	\$16,000
Media Kits and Communications Pieces	\$20,000	\$20,000
Press Releases	\$8,000	\$8,000
Totals	\$225,000	\$225,000