

Prepared by:

Innovative Research Group, Inc.

Toronto • Vancouver • Calgary

www.innovativeresearch.ca



2013 Ad Campaign Assessment ▶▶

Wine Country Ontario Campaign



Prepared for:

Wine Council of Ontario

4890 Victoria Ave. North, PO Box 4000

Vineland Station, ON

LOR 2E0



Research Objective

Innovative Research Group (INNOVATIVE) was commissioned by the Wine Council of Ontario (WCO) to conduct the **2013 WCO Ad Campaign Assessment**.

The online survey was conducted for the purpose of assessing awareness levels and the impact of the “Wine Country Ontario” advertising campaign in the Greater Toronto Area.

A post-campaign survey was designed with the following research objectives:

1. Track **core awareness** questions surrounding Ontario Wine Country travel.
2. Measure the degree of **awareness and impact the ad campaign** had on GTA residents.
3. Assess how **effective the campaign was at moving target consumer opinions** towards travel in Ontario’s wine country.
4. To **account for commuters who live outside Toronto**, an additional sample from the GTA was included to assess what impact the campaign has had beyond Toronto proper.

Methodology

2013 Study ▶▶

- These are the findings of an **Innovative Research Group** (INNOVATIVE) online survey poll conducted for the **Wine Council of Ontario**. The survey was conducted from **July 24 to August 7, 2013**.
- The online survey is based on a **1,215 surveys completed** among qualified respondents.
- Survey respondents only qualified to complete the survey if they are a **GTA-based resident** and have **consumed at least one glass of wine over the past month**.
- The sample has been weighted for age, gender and region using Statistics Canada's Census data to reflect a representative sample of customers by demographic make-up.
- A probability sample of this size would have an estimated **margin of error of $\pm 2.8\%$** , 19 times out of 20.
- The margin of error will be larger within each sub-grouping of the sample.

Previous Studies: 2010 to 2012 ▶▶

- Previous tracking studies also screened qualifying respondents for Household income of \$80K or more, and age of 25 years or older.

Note: *Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

Methodology: Sample Design

2010-2012 Sample Design

GTA Residents

Age 18-24

Age 25 or older

Household
income below
\$80k

Household
income of
\$80k or above

Drinks
wine less
frequently

Drinks wine
at least
once a
month

Target
audience

 = eliminated sample

2013 Sample Design

GTA Residents

Age 18+

All Household Incomes

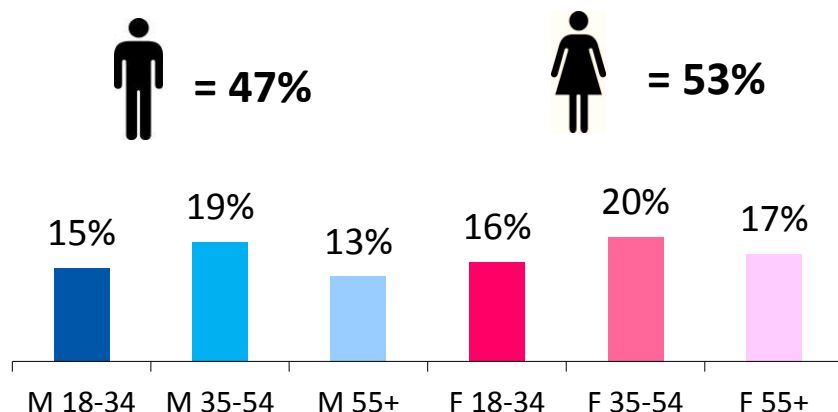
Drinks wine less
frequently

Drinks wine at least
once a month

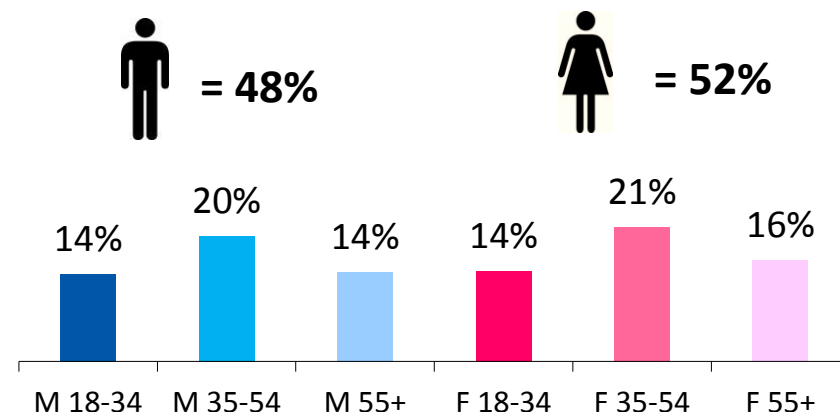
Target audience

Demographics: *Respondent Profile*

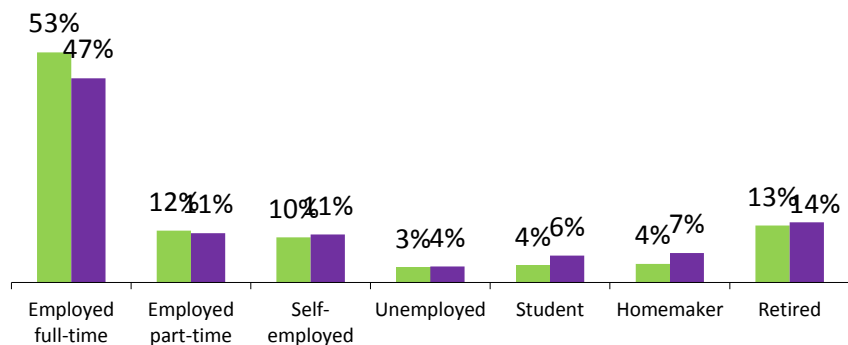
Age-Gender: Toronto



Age-Gender: Rest of GTA

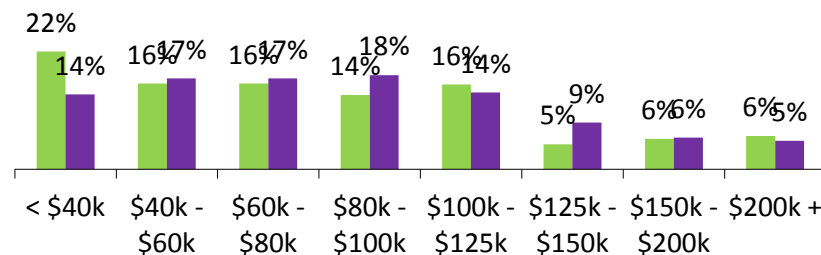


Employment Status



■ Toronto

Household Income

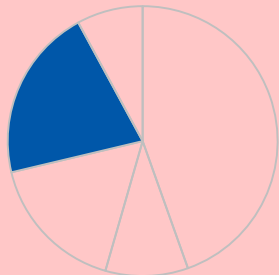


■ Rest of GTA

2013 Post-Wave Sample: Where do respondents live?

Peel Region

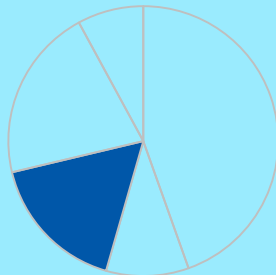
n=251



21% of sample*

York Region

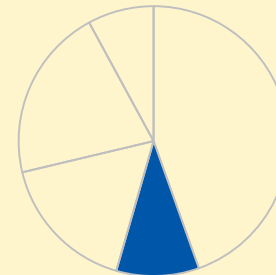
n=203



17% of sample*

Durham Region

n=119



10% of sample*

Halton Region

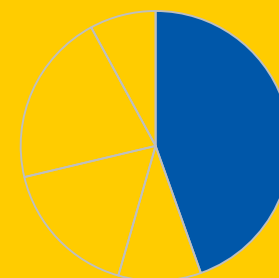
n=98



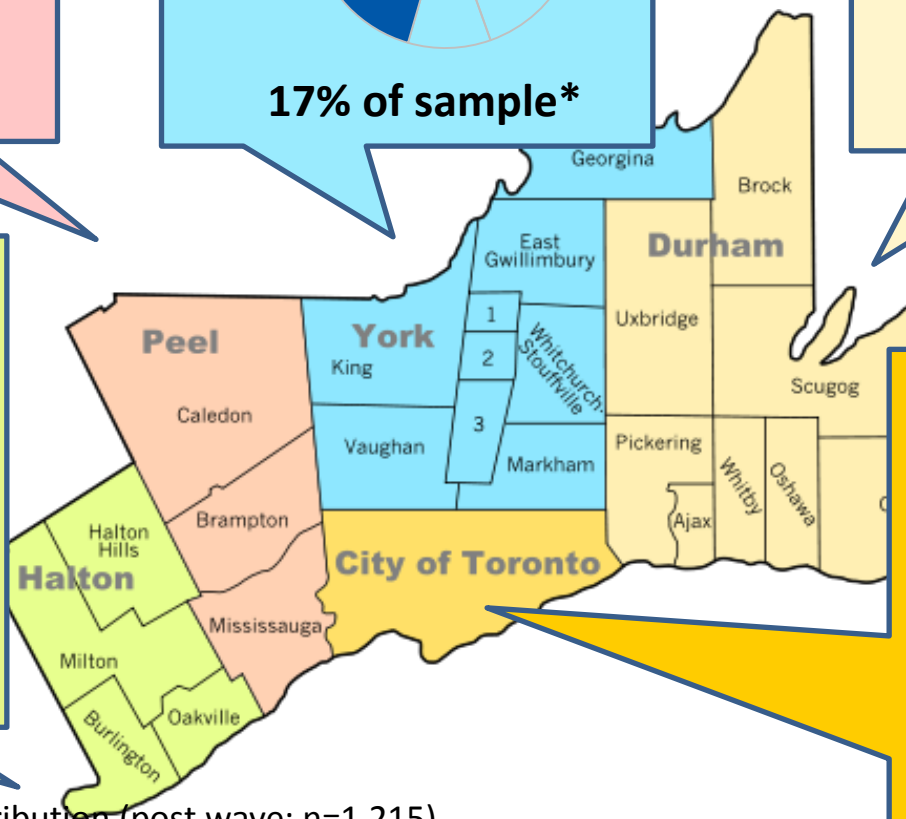
8% of sample*

City of Toronto

n=544



45% of sample*



* refers to weighted sample distribution (post wave; n=1,215)

Demographics Overview of GTA Target Market: 72% of GTA target market work; of those employed, 61% work in Toronto, 39% in RoGTA

Peel Region

Population: 1,279,000
Median income: \$72,655

Target Market Statistics:

Workforce: 67% of pop. working
33% work in the City of Toronto
59% work in Peel Region
9% work elsewhere

Of the 84% who work in the GTA:

74% drive to work
18% take public transit to work
8% walk or cycle to work

York Region

Population: 1,032,000
Median income: \$81,928

Target Market Statistics:

Workforce: 68% of pop. working
37% work in the City of Toronto
58% work in the York Region
5% work elsewhere

Of the 85% who work in the GTA:

78% drive to work
17% take public transit to work
5% walk or cycle to work

Durham Region

Population: 608,000
Median income: \$75,397

Target Market Statistics:

Workforce: 69% of pop. working
25% work in the City of Toronto
71% work in the Durham Region
4% work elsewhere

Of the 83% who work in the GTA:

69% drive to work
25% take public transit to work
7% walk or cycle to work

Halton Region

Population: 502,000
Median income: \$83,496

Target Market Statistics:

Workforce: 80% of pop. working
22% work in the City of Toronto
57% work in the Halton Region
17% work in the Peel Region
3% work elsewhere

Of the 69% who work in the GTA:

85% drive to work
13% take public transit to work
2% walk or cycle to work



City of Toronto

Population: 2,615,000
Median income: \$52,833

Target Market Statistics:

Workforce: 75% of pop. working
91% work in the City of Toronto
9% elsewhere

Of the 96% who work in the GTA:

50% drive to work
41% take public transit
9% walk or cycle

Of the employed GTA target market outside of Toronto, 31% commute into the city for work.

Setting the Context

Post-ad campaign survey ►►

August 2013

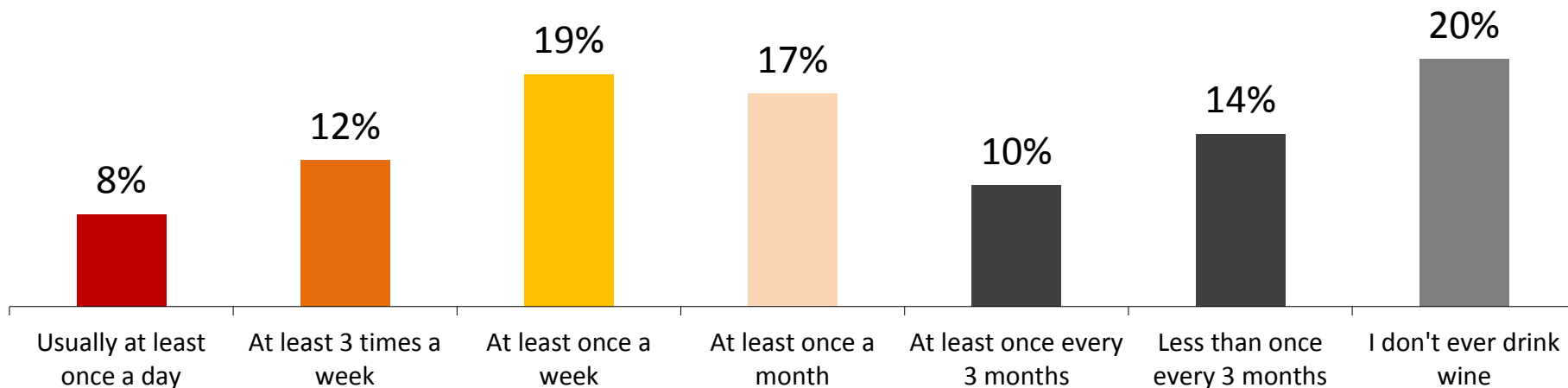
Frequency of wine consumption: *unweighted*

Q

Which of the following frequencies best describes how often you drink wine?

**Roughly 56% of GTA residents drink wine
at least once every month**

**Removed from analysis
(unqualified to complete survey)**



unweighted; n=2,203

998 respondents disqualified from survey.

"Don't know" removed from calculations above.

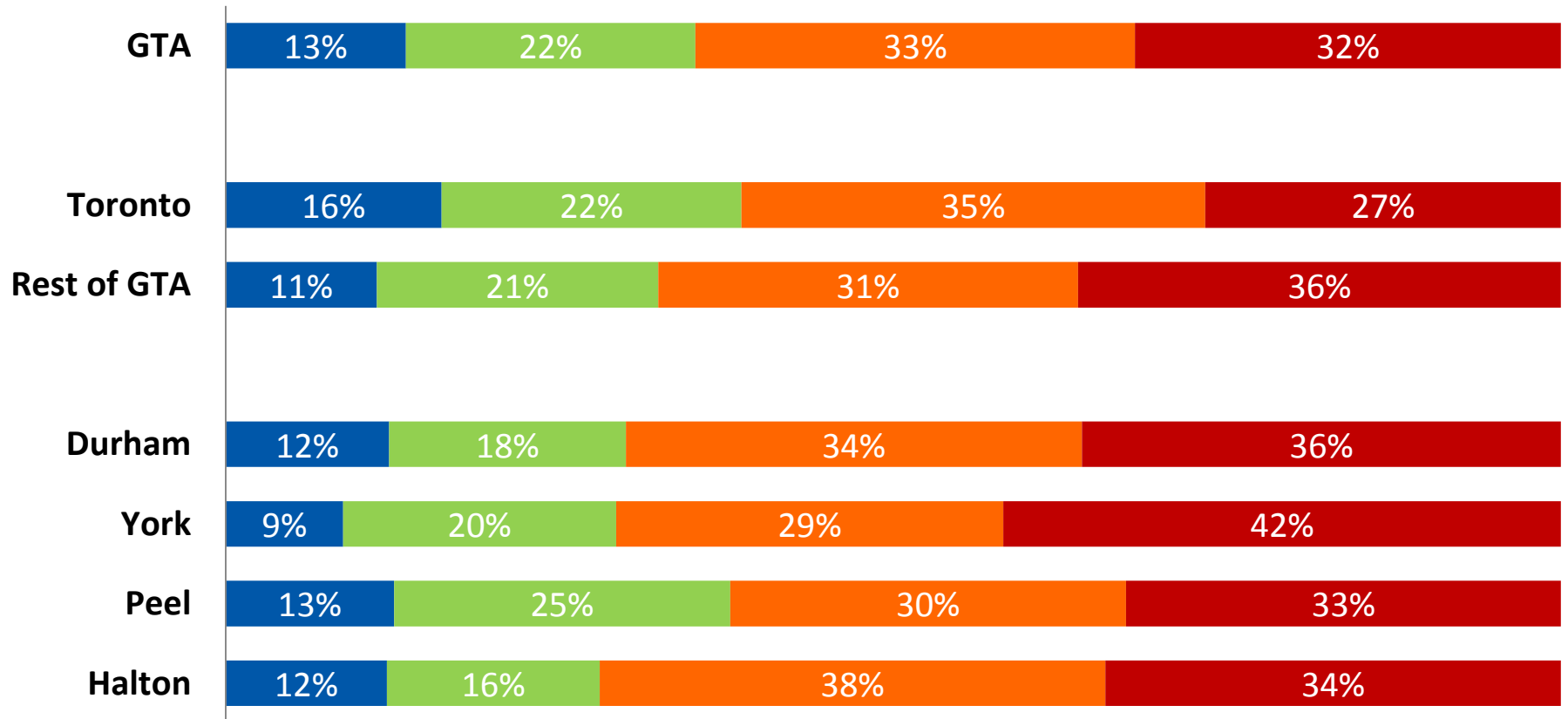
Frequency of wine consumption: Torontonians within the target market drink wine most frequently

10

Q

Which of the following frequencies best describe how often you drink wine?

[asked of all GTA respondents; n=1,215]



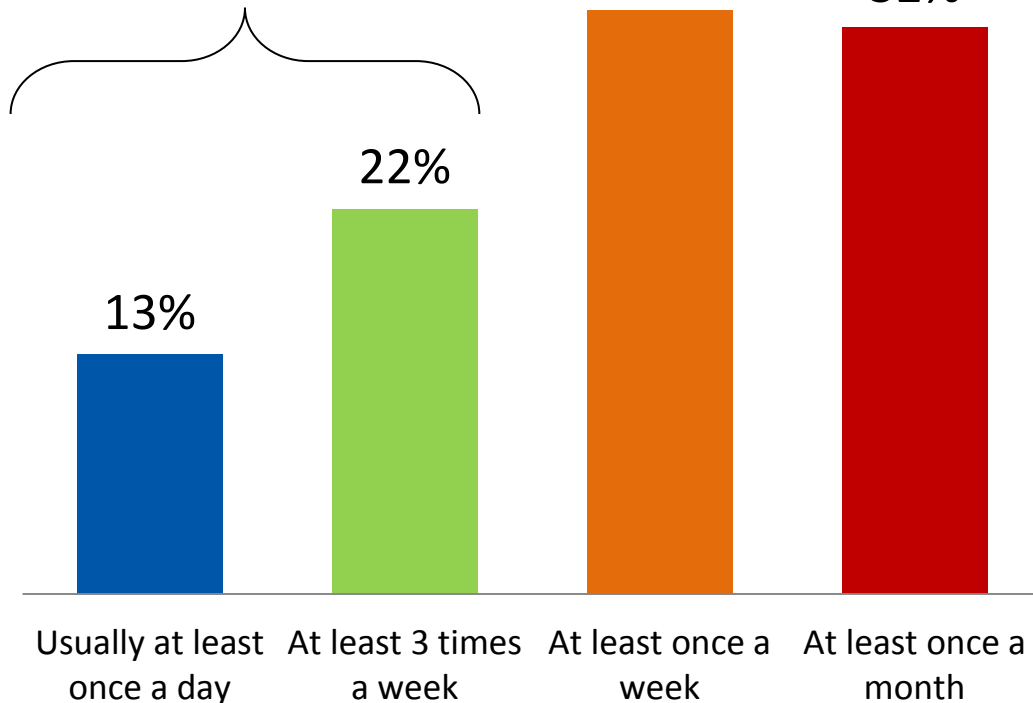
■ Usually at least once a day ■ At least 3 times a week ■ At least once a week ■ At least once a month

Frequency of wine consumption: 35% of Ontarians surveyed consume wine more than once a week



Which of the following frequencies best describes how often you drink wine?

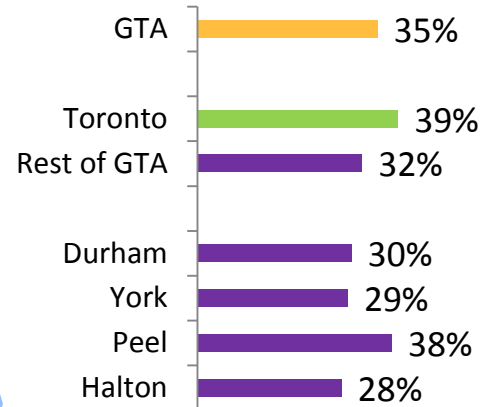
35% of respondents consume wine more than once a week



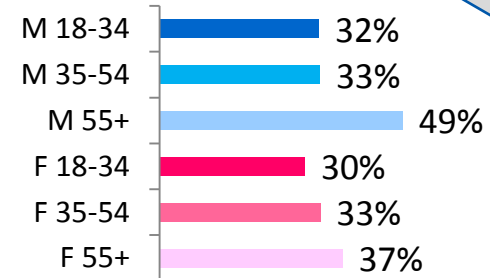
Sample Breakdown ►►

Respondents who drink wine more than once a week:

Regional Segmentation



Age-Gender



Total Male

37%

33%

Total Female

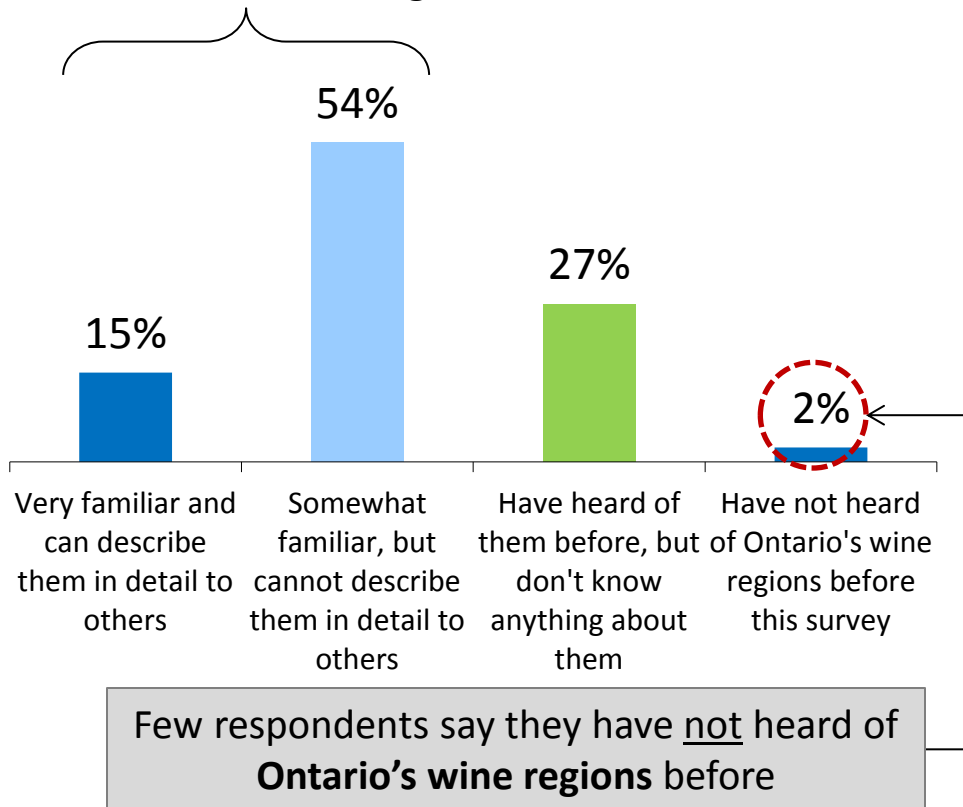
Familiarity: Majority of target consumers familiar with Ontario's wine regions; older male consumers most familiar



How familiar would you say you are with **Ontario's wine regions?**

(asked of all respondents)

69% claim to be familiar with Ontario's wine regions

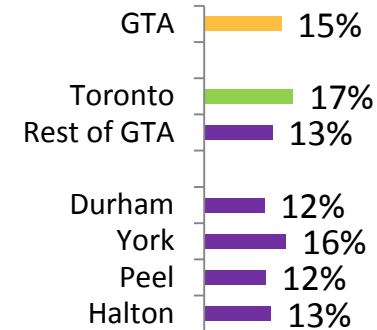


Note: 'Don't know' (2%) not shown

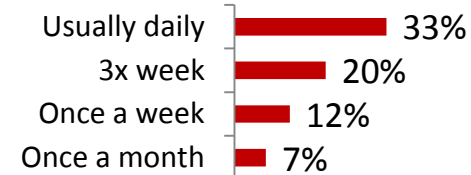
Sample Breakdown ►►

Respondents who say they are very familiar:

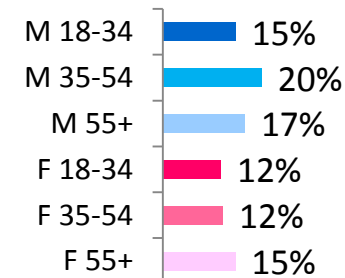
Regional Segmentation



Wine Consumption



Age-Gender



17%

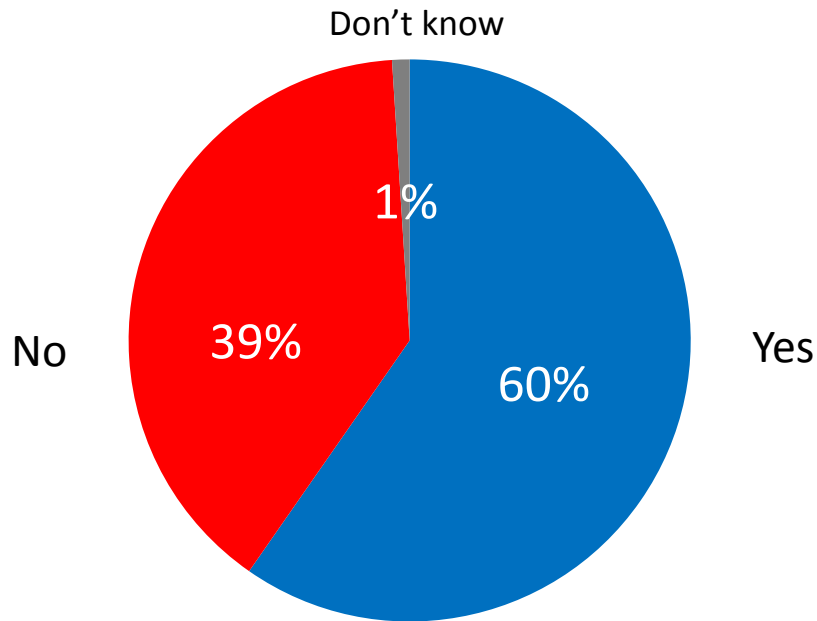
13%

Winery Visit: over 3-in-5 (60%) have travelled to Ontario's wine regions to visit a winery, especially older folks

Q

Have you ever travelled to **Ontario's wine regions** to visit a winery?

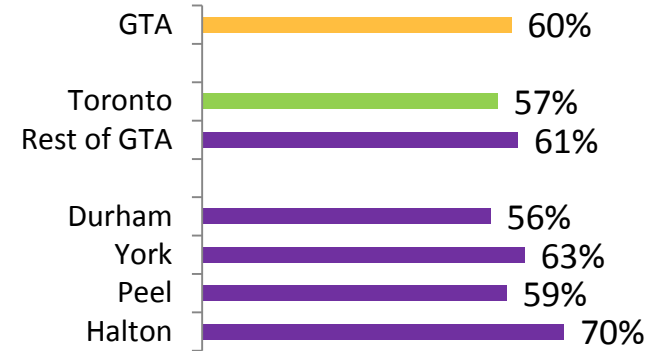
(asked only of those who have at least heard about Ontario's wine regions before this survey; n = 1,187)



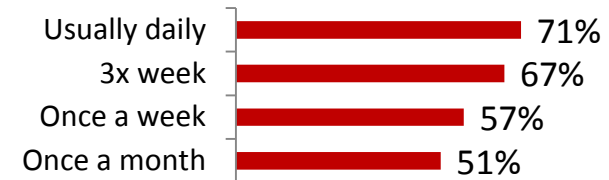
Sample Breakdown ▶▶

Respondents who have visited an Ontario winery:

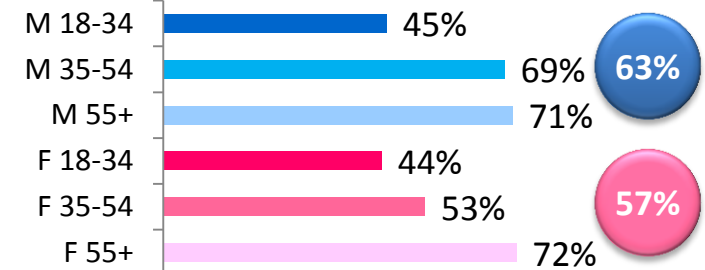
Regional Segmentation



Wine Consumption



Age-Gender

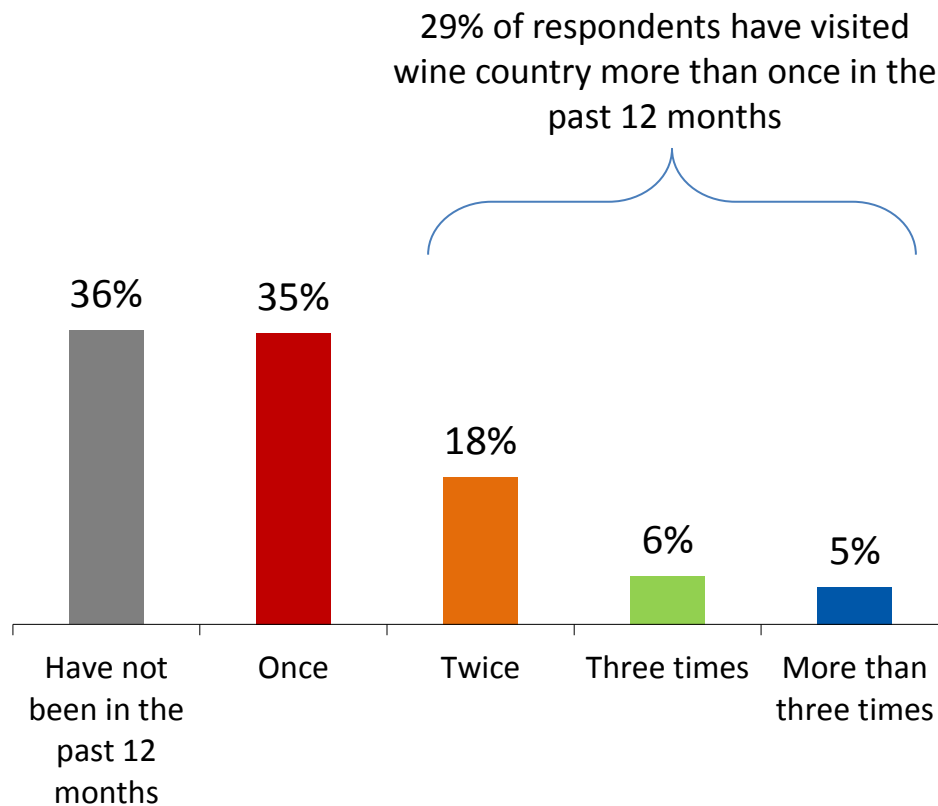


Frequency of Visits: 3-in-10 Torontonians have been to Ontario's wine regions more than once in the past 12 months



How often have you been to **Ontario's wine regions** to visit a winery in the **past 12 months**?

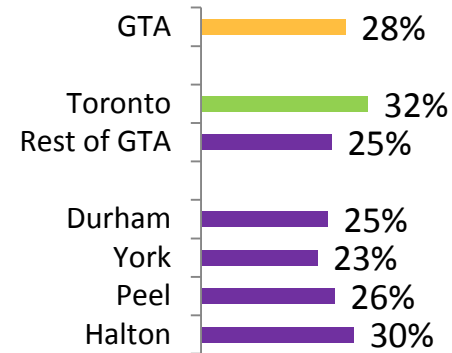
(asked only of those who have travelled to Ontario's wine regions to visit a winery; n=706)



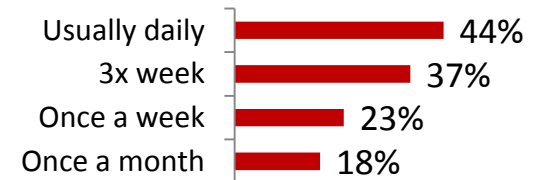
Sample Breakdown ►►

Respondents who have visited more than once:

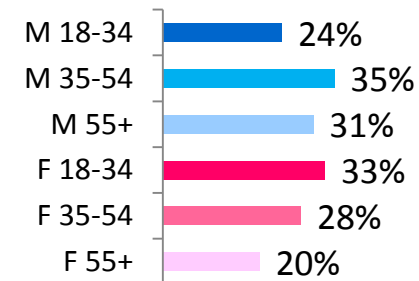
Regional Segmentation



Wine Consumption



Age-Gender



31%

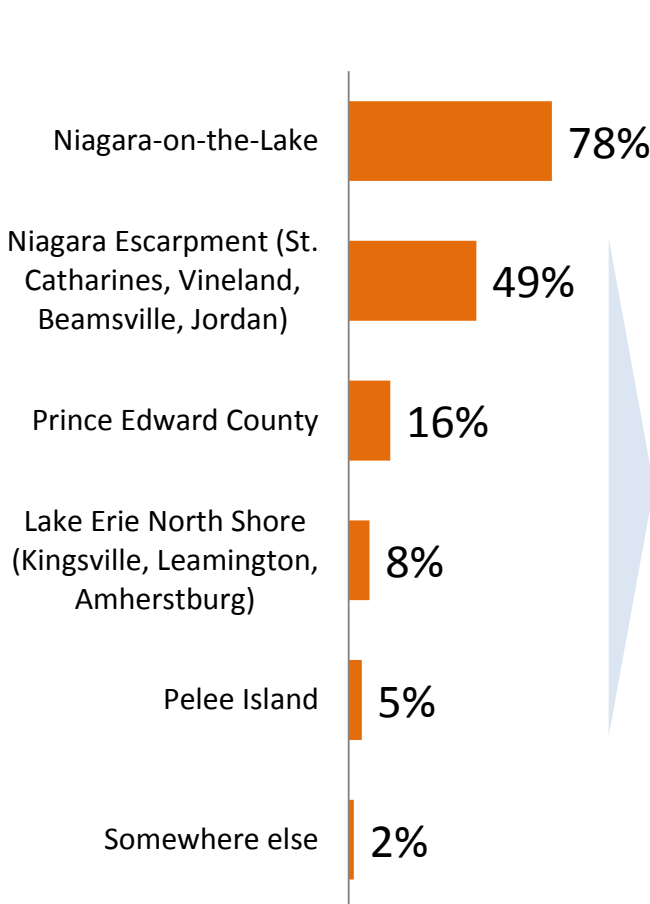
26%

Ontario wine regions visited: Niagara-on-the-Lake by far the most visited wine region overall



Which **Ontario wine regions** have you visited in the **past 12 years**?

[asked only of those who have visited Ontario's wine regions at least once in the past 2 years; multiple selection allowed; n=454]



2013	GTA	Toronto	Durham	York	Peel	Halton
Niagara-on-the-Lake	78%	79%	68%	84%	81%	70%
Niagara Escarpment	49%	47%	41%	44%	54%	66%
Prince Edward County	16%	20%	28%	11%	7%	10%
Lake Erie North Shore	8%	12%	0%	8%	5%	1%
Pelee Island	5%	7%	2%	0%	3%	4%
Somewhere else	2%	2%	2%	5%	3%	2%

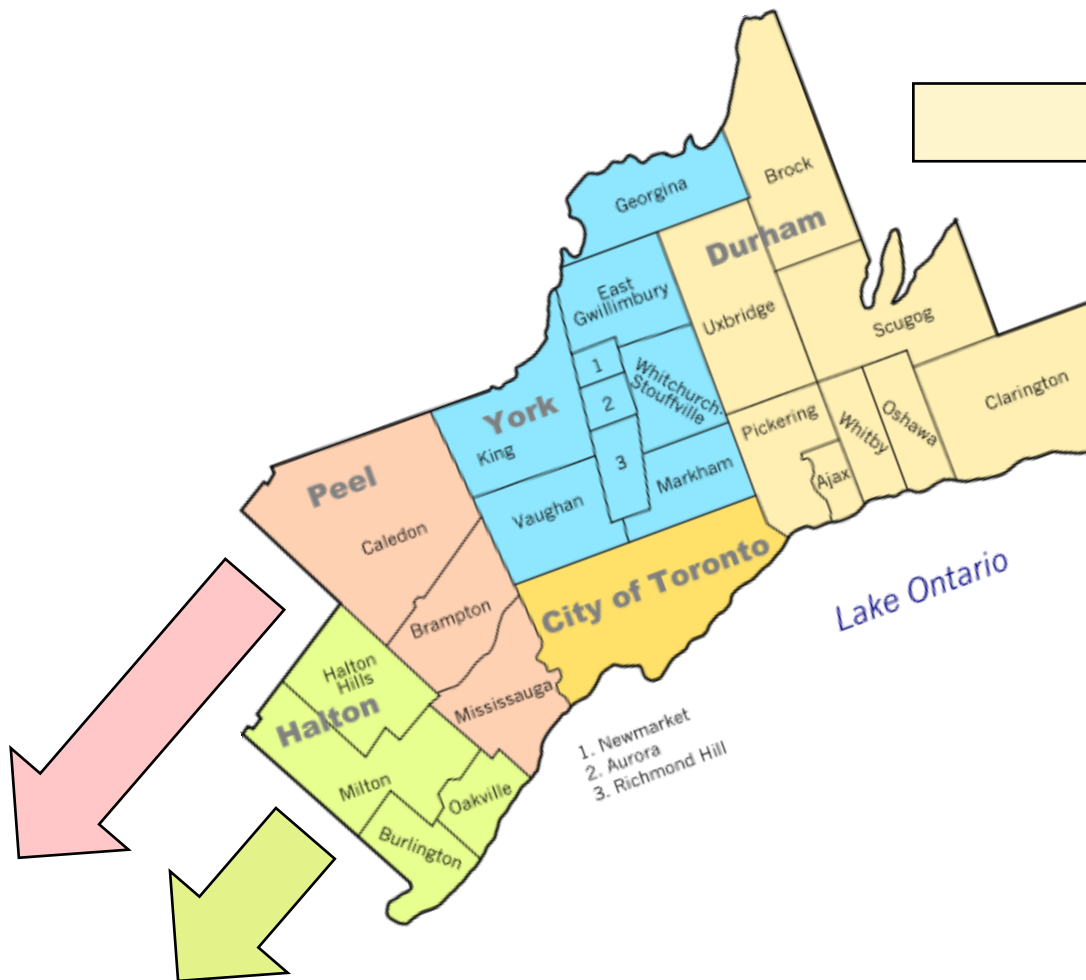


Below GTA average



Above GTA average

Ontario Wine Regions Visited: *Who's going where?*



Most (78%) GTA residents who visit wineries are visiting Niagara-on-the-Lake.

However, residents of the western GTA (Peel and Halton) are the most likely to head west and visit the Niagara Escarpment.

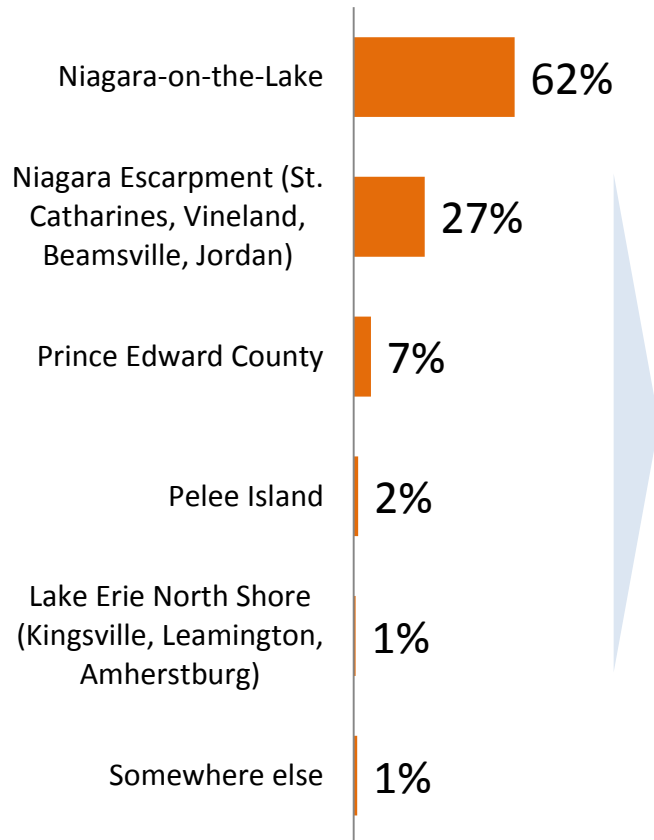
Residents of the eastern GTA (Durham) are the most likely to head east and visit Prince Edward County; yet these same residents are still more likely to visit the Niagara region.

Ontario wine regions visited: in terms of last region visited, Niagara-on-the-Lake most popular

Q

Thinking about the **last** Ontario winery you visited, in which **wine region** was it?

[asked only of those who have visited multiple wineries in the past two years and those who have visited a winery but not in the last 12 months; n=702]



2013	GTA	Toronto	Durham	York	Peel	Halton
Niagara-on-the-Lake	62%	63%	49%	74%	62%	46%
Niagara Escarpment	27%	26%	27%	17%	30%	47%
Prince Edward County	7%	8%	19%	4%	3%	2%
Peelee Island	2%	2%	1%	2%	2%	3%
Lake Erie North Shore	1%	1%	1%	1%	1%	0%
Somewhere else	1%	0%	1%	3%	2%	2%



Below GTA average



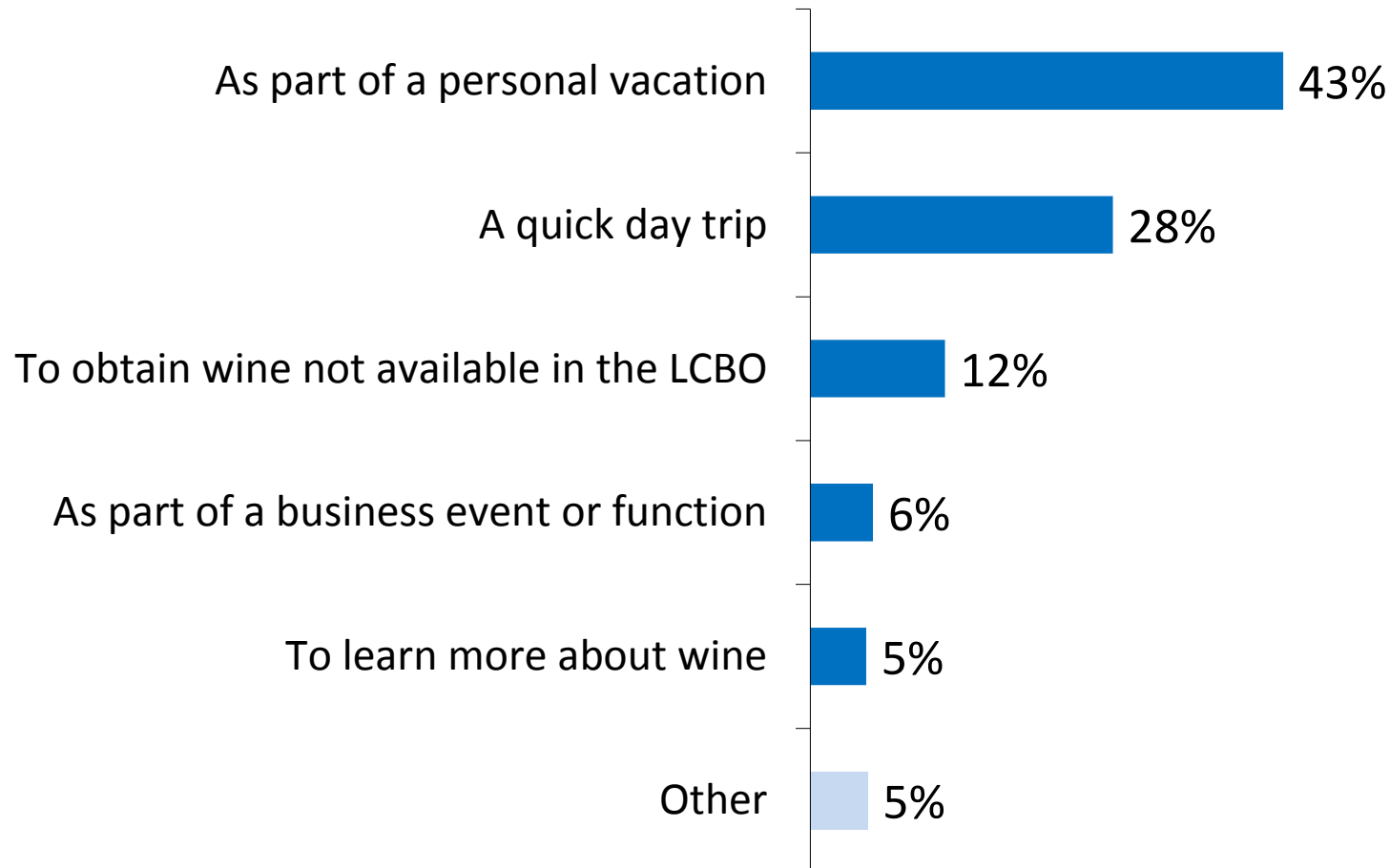
Above GTA average

Reason for Visit: over 2-in-5 last visited a Ontario winery as part of a personal vacation



Thinking about the **last** time you went to an Ontario winery, what was your primary reason for the visit?

(asked only of those who have travelled to Ontario's wine regions to visit a winery; n= 706)



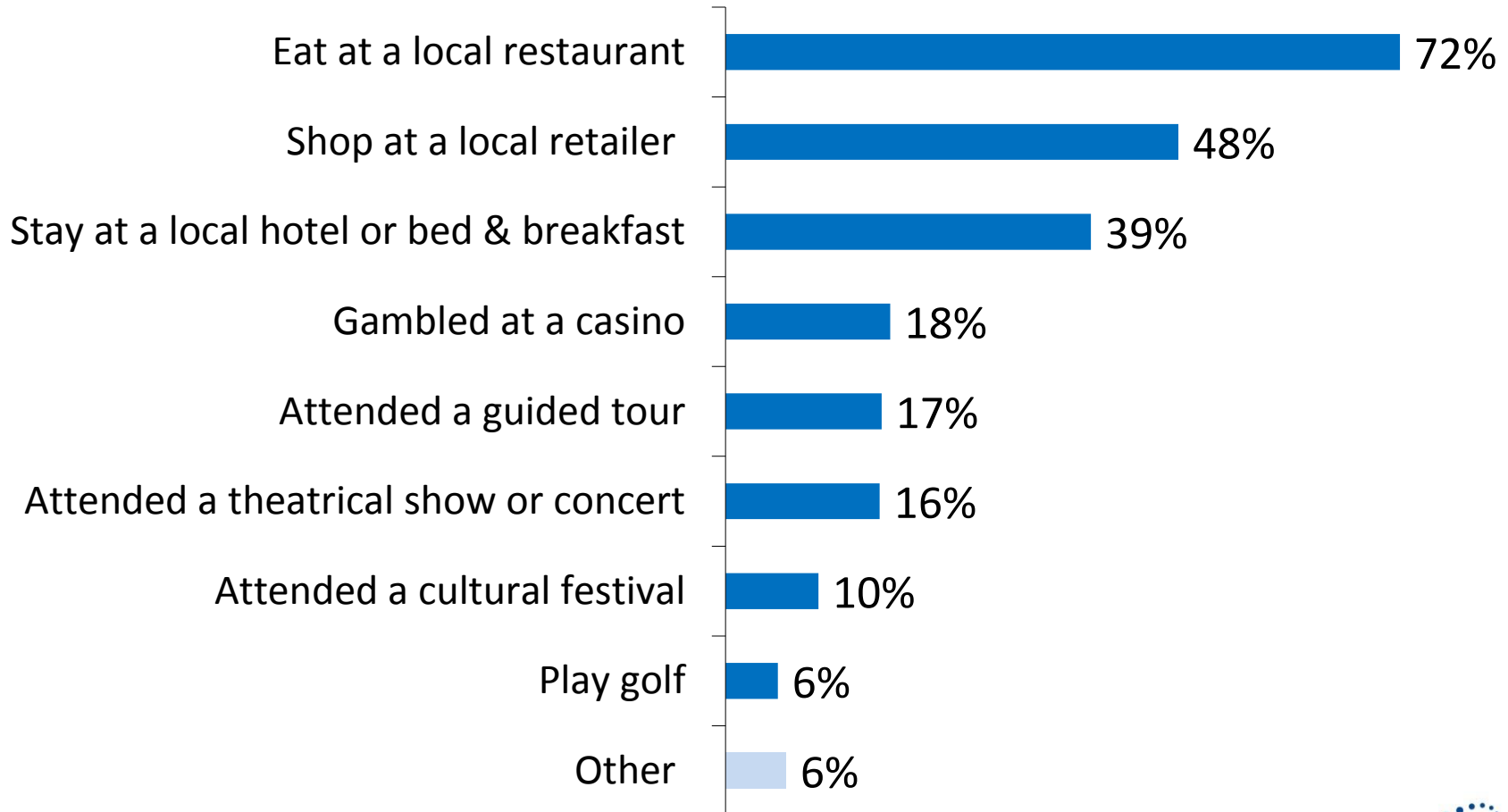
Note: 'Don't know' (1%) not shown

Winery Visit Activities: A large majority of Torontonians eat at a local restaurant and shop at a local retailer on visits

Q

Did you do any of the following during your last trip to a winery in Ontario's wine country?

(asked only of those who have travelled to Ontario's wine regions to visit a winery; multiple selection: percentages may not add to 100%; n = 706)

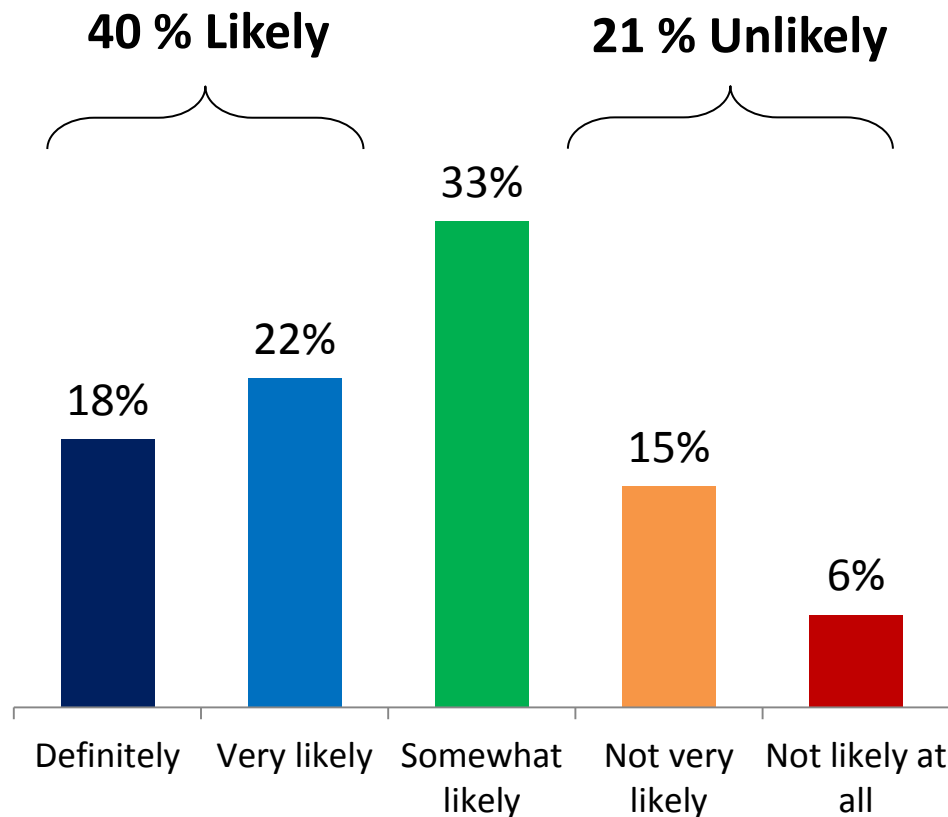


Note: 'Don't know' (3%) not shown

Future Visits: 2-in-5 say they are likely to visit a Ontario winery in the next 12 months

Q How likely are you to visit a winery in Ontario's wine regions in the **next 12 months**?

(asked of all respondents)

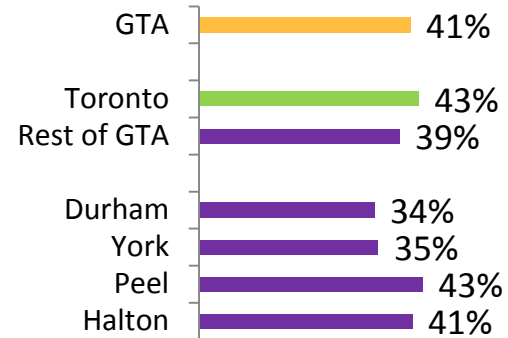


Note: 'Don't know' (5%) not shown

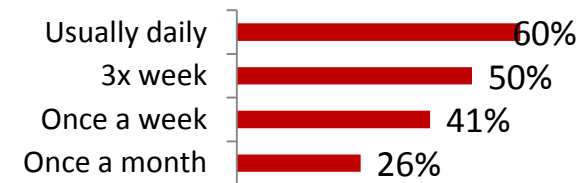
Sample Breakdown ►►

Those who are likely to visit wine country:

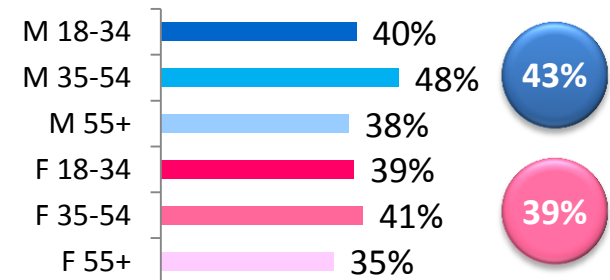
Regional Segmentation



Wine Consumption



Age-Gender



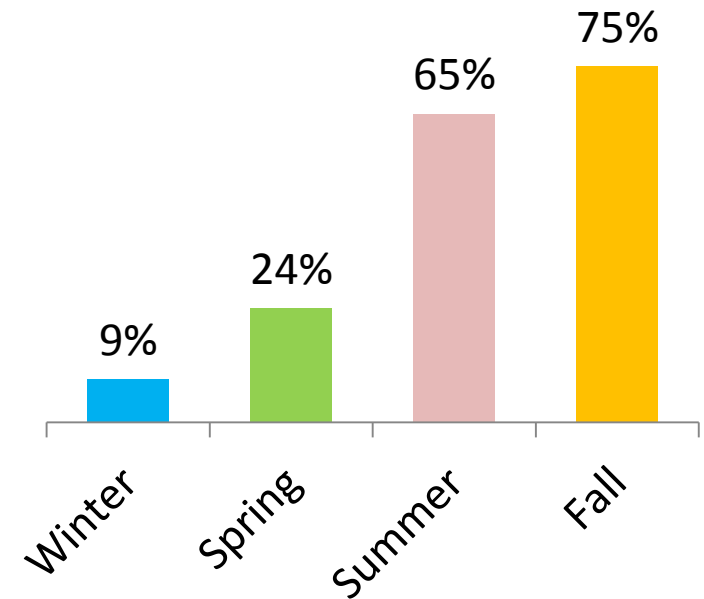
Months to Visit: August and September are the two most popular months for Torontonians to visit wine country

Q

Thinking about the **next 12 months**, in what month(s) do you plan to visit a winery or wineries in Ontario's wine region?

(asked only of those who are definitely, very likely, and somewhat likely to visit a winery in Ontario's wine regions in the next 12 months; multiple mention; n= 858)

CALENDAR			
January 3%	February 3%	March 3%	April 8%
May 13%	June 18%	July 19%	August 28%
September 42%	October 25%	November 8%	December 3%



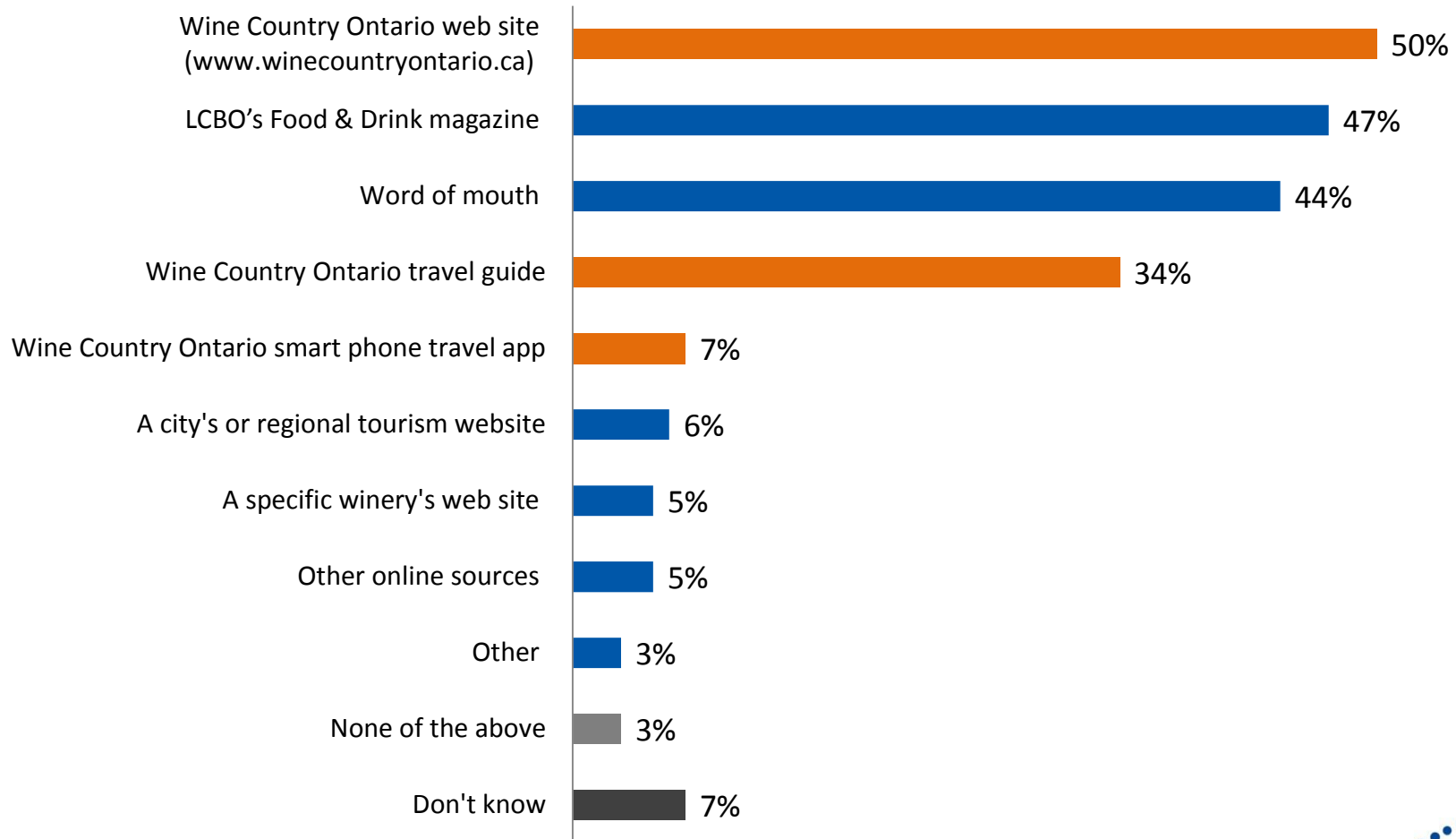
Note: 'Don't know' (9%) not shown

Planning Source: WCO web site now top source of trip information; more so than LCBO's Food & Drink Magazine

Q

Where will you look for information when planning your next trip to an Ontario winery?

[asked only of those who are definitely, very likely, and somewhat likely to visit a winery in Ontario's wine regions in the next 12 months; multiple selection: percentages may not add to 100%]



Campaign Assessment

Post-ad campaign survey ►►

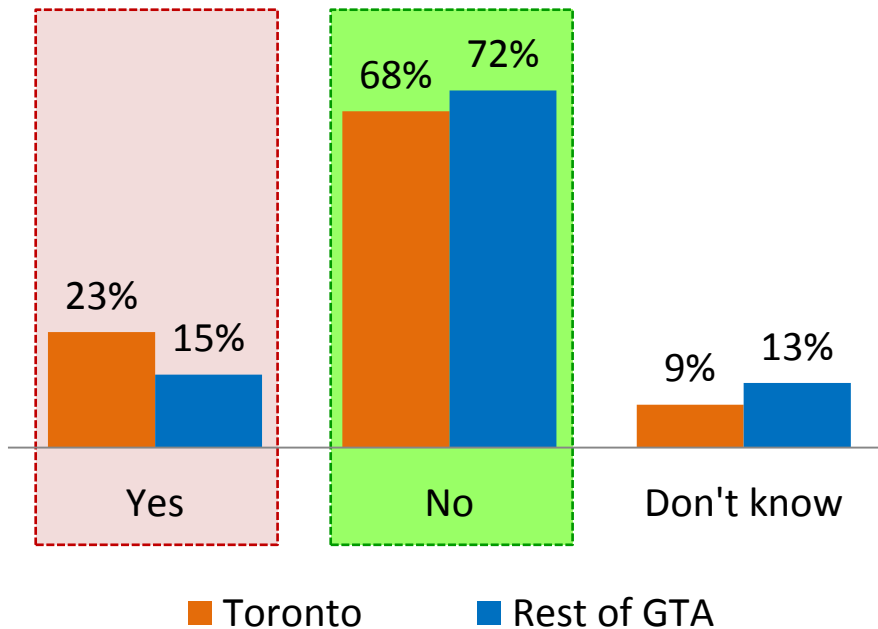
August 2013

Campaign Recall: 19% of GTA respondents believe they saw the recent Wine Country ad campaign



Recently, **Wine Country Ontario** launched an awareness campaign, including advertising. Do you recall reading, hearing or seeing anything about this campaign?

[asked of all respondents]



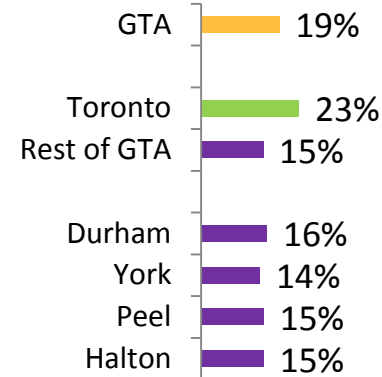
30% of GTA respondents who did recall the campaign unprompted later do not recalled seeing at least one of the displayed ads.

22% of GTA respondents who did not recall the campaign unprompted later recalled seeing at least one of the displayed ads.

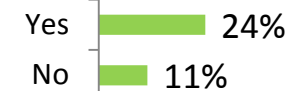
2013 GTA Sample Breakdown ▶▶

Respondents who say they recall the ad campaign:

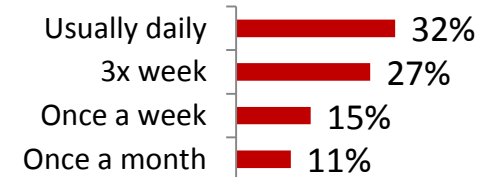
Regional Segmentation



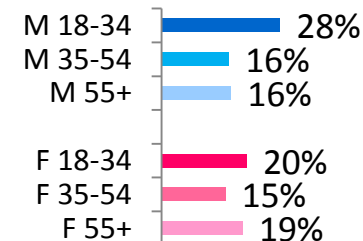
Have Visited Ontario Wine Country



Wine Consumption



Age-Gender



20%

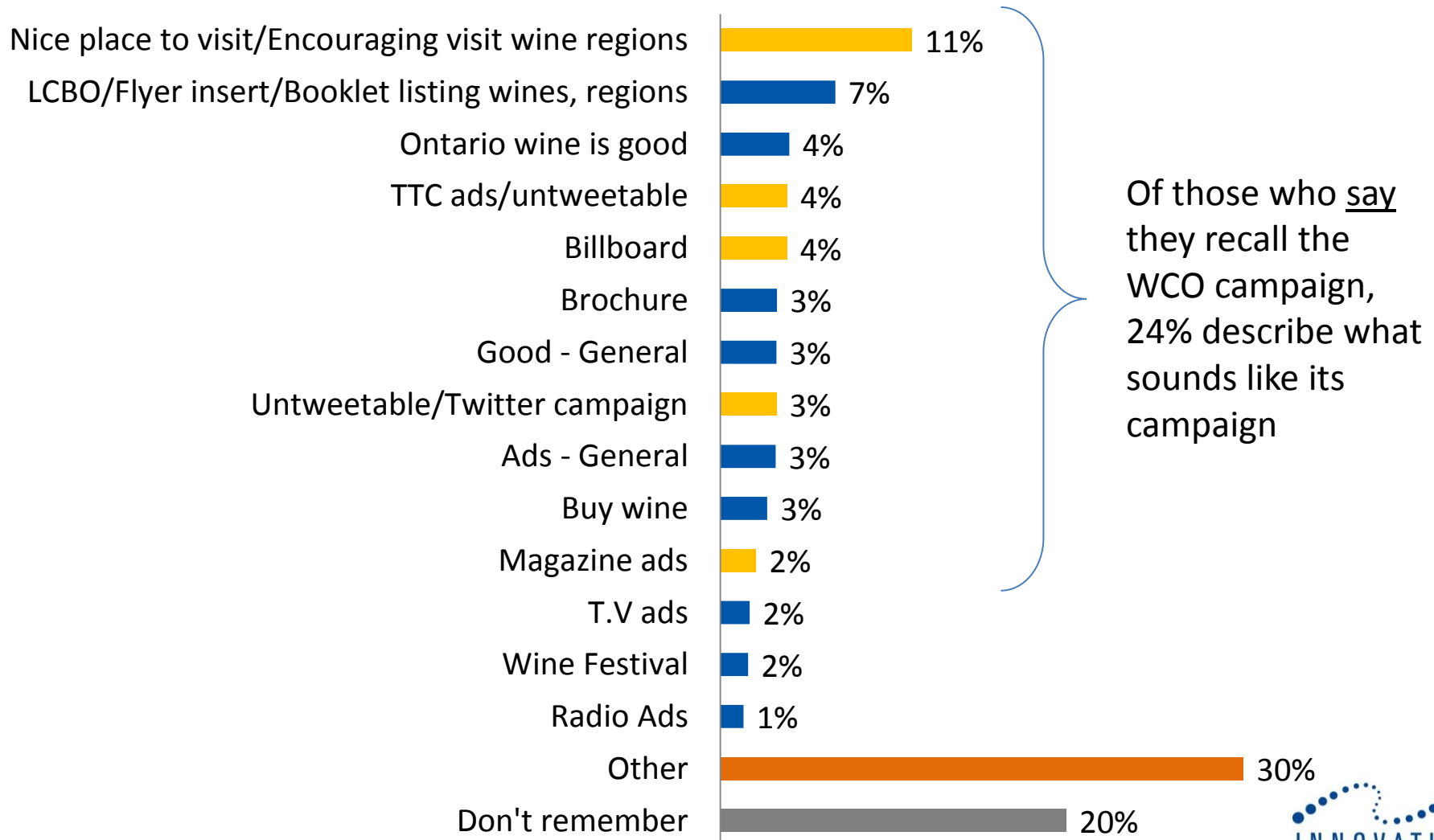
18%

Unaided campaign specifics: GTA residents recalls a number of campaigns that support Ontario wineries



And being as specific as you can, what do you recall hearing, reading or seeing about **this campaign**?

[asked only of those who have read, seen, or heard anything about the WCO awareness campaign; open-ended]



Aided Awareness: 31% of target market in GTA recall recent WCO advertising – highest among Torontonians (39%)

Q Just to be clear, over the last few weeks, do you recall seeing any of the following advertisements on outdoor billboards or posters, on public transit or in *Maclean's* magazine and/or the LCBO's *Food & Drink* magazine?
[asked of all respondents]

Saw at least one WCO ad

GTA: **31%**
Live in Toronto: **39%** | Work in Toronto: **40%** | Live Outside Toronto: **24%**

Concept 1 (Henry of Pelham)



Yes
Toronto: **24%**
Rest of GTA: **11%**

Concept 4 (Table w/ Wine & Cheese)



Yes
Toronto: **17%**
Rest of GTA: **7%**

Concept 7 (Picnic)



Yes
Toronto: **15%**
Rest of GTA: **8%**

Concept 2 (Closson Chase)



Yes
Toronto: **15%**
Rest of GTA: **7%**

Concept 5 (Lailey Vineyard Winery)



Yes
Toronto: **18%**
Rest of GTA: **10%**

Concept 8 (Hidden Bench Vineyard)



Yes
Toronto: **15%**
Rest of GTA: **6%**

Concept 3 (Lake Erie North Shore)



Yes
Toronto: **19%**
Rest of GTA: **10%**

Concept 6 (Norman Hardie)

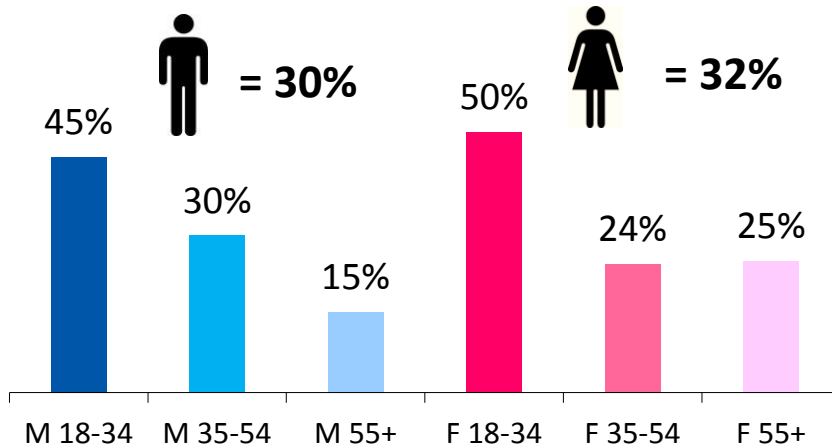


Yes
Toronto: **13%**
Rest of GTA: **7%**

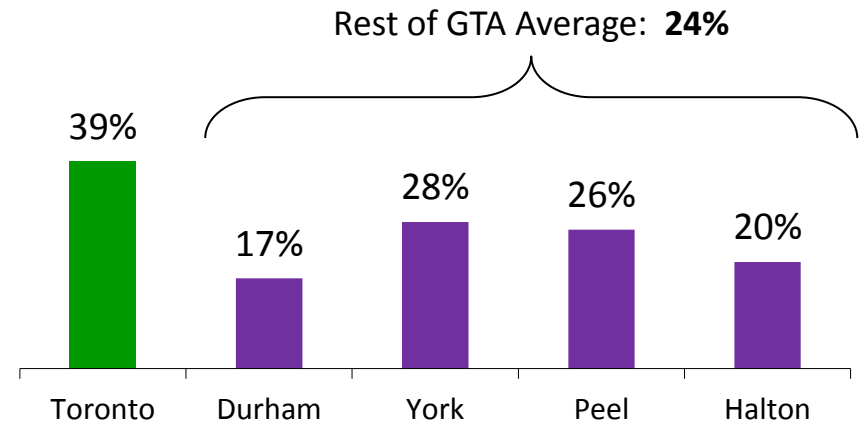
Campaign Exposure: Profile of those who saw at least one of the advertising concepts

27

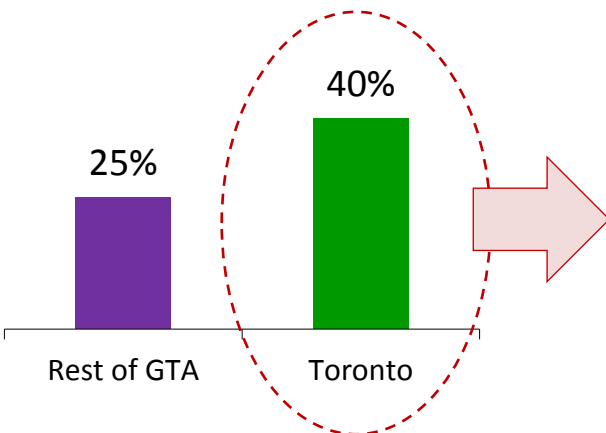
Age-Gender: GTA



Region: Live

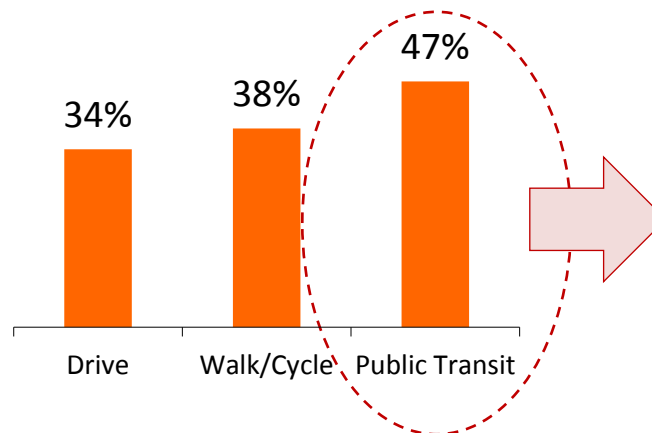


Region: Work



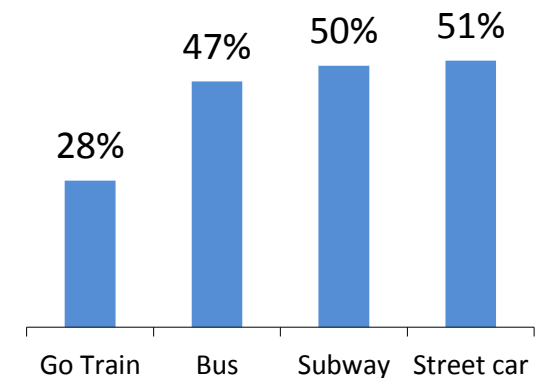
Asked only of the 67% who are employed and work in the GTA.

Toronto Commuters



Asked only among the 41% of respondents who work in the City of Toronto.

Public Transit Users



Asked only among the 17% of respondents who work in Toronto and use public transit to get to their place of employment.

Advertising Channels: GTA residents most likely to see bus shelter ads; suburbanites most likely to see *Food & Drink* ad



Where did you see the **Wine Country Ontario** advertising?

[asked only of 31% of respondents who recalled seeing the campaign ads; multiple selection allowed; Toronto n=xxx; Rest of GTA n=xxx]

		Residence		Work Region*		Age-Gender					
	GTA Average	Toronto	Rest of GTA	Toronto	Rest of GTA	M 18-34	M 35-54	M 55+	F 18-34	F 35-54	F 55+
Bus Shelter Poster	27%	34%	17%	33%	26%	36%	32%	16%	28%	27%	8%
Stand Alone Street Poster	12%	14%	9%	15%	9%	22%	10%	0%	16%	6%	2%
Billboard	30%	33%	25%	33%	34%	43%	36%	20%	29%	24%	12%
Digital board (electronic billboard that cycles through ads)	9%	14%	4%	15%	2%	15%	12%	5%	7%	11%	1%
Toronto interior subway posters	25%	33%	14%	31%	18%	22%	34%	24%	29%	23%	13%
Toronto subway platform	28%	36%	17%	36%	14%	28%	22%	22%	36%	40%	10%
Toronto interior streetcar posters	11%	16%	4%	15%	8%	16%	12%	6%	10%	11%	6%
Toronto exterior streetcar posters	10%	10%	9%	11%	12%	15%	16%	0%	7%	10%	1%
GTA interior bus posters	10%	12%	9%	10%	15%	16%	13%	0%	9%	12%	6%
GTA exterior bus posters	7%	9%	4%	8%	6%	9%	11%	7%	3%	9%	2%
LCBO's <i>Food & Drink</i> magazine	37%	32%	43%	32%	41%	30%	41%	43%	34%	34%	48%
<i>Maclean's</i> magazine	14%	14%	15%	11%	21%	11%	24%	23%	16%	4%	9%
<i>Social media (Twitter or Facebook)</i>	13%	12%	14%	10%	17%	12%	20%	0%	19%	8%	7%
Don't know	7%	5%	10%	6%	8%	2%	8%	11%	7%	3%	19%

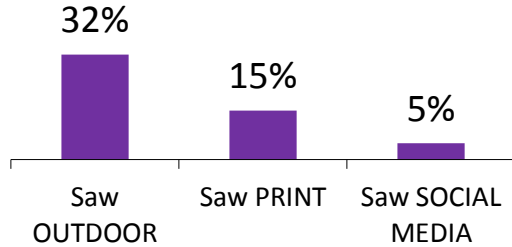
Note: "Other" (1%) not shown.

*Asked only of respondents who are employed.

Campaign Exposure by Channel:

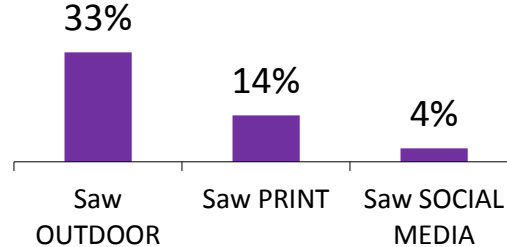
Those who work in Toronto have had the greatest campaign exposure

Live in Toronto



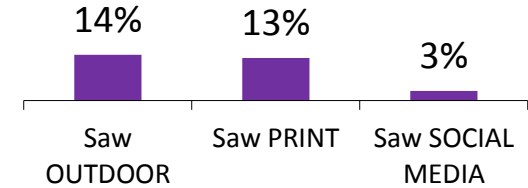
Multiple mention

Work in Toronto

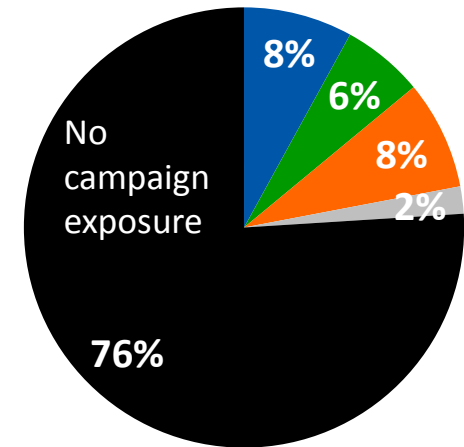
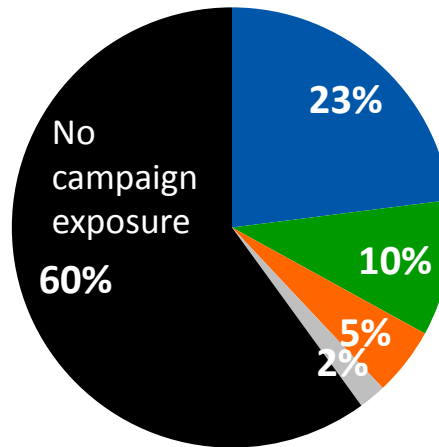
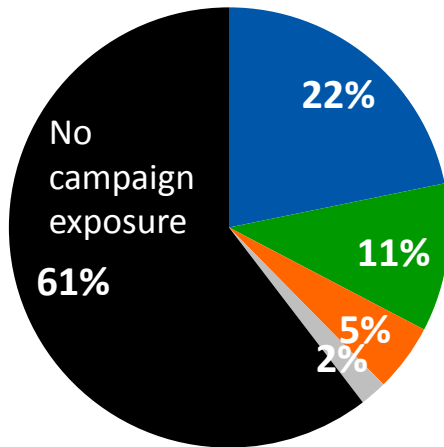


Multiple mention

Live Outside of Toronto



Multiple mention



Saw OUTDOOR only (14% GTA-wide)



Saw both OUTDOOR and OTHER ads (8% GTA-wide)



Saw OTHER (Print & Social Media) ads only (7% GTA-wide)



Can't remember (2% GTA-wide)

Overall Impression: majority of respondents who saw the advertising had a favourable impression

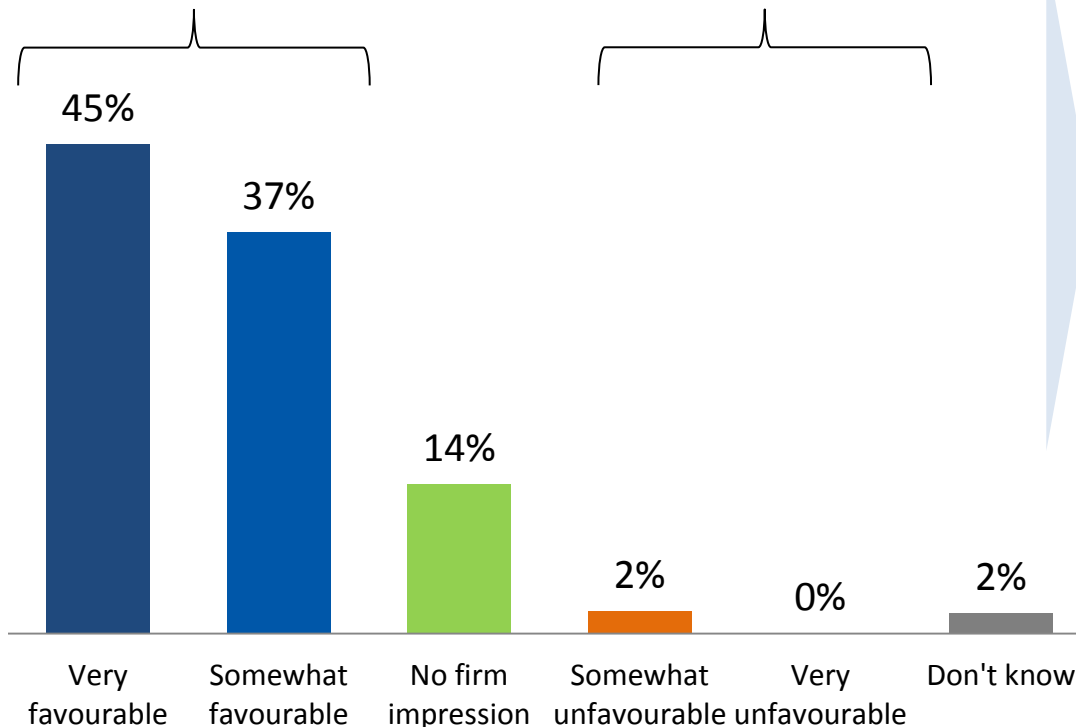


What would you say your overall impression was of the **Ontario's wine country** advertising you saw?

[asked only of those who recalled seeing the campaign ads; n=378]

Favourable Impression:

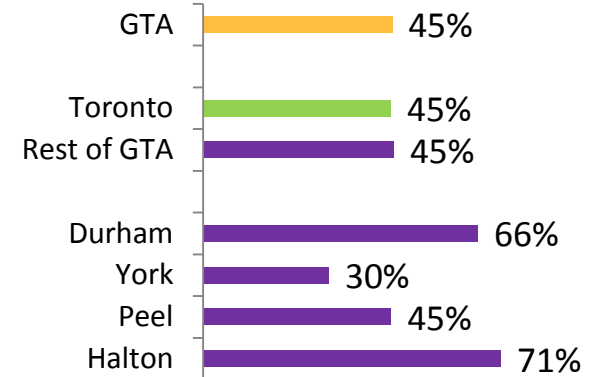
82%



2013 GTA Sample Breakdown ►►

Respondents who has a "very favourable impression":

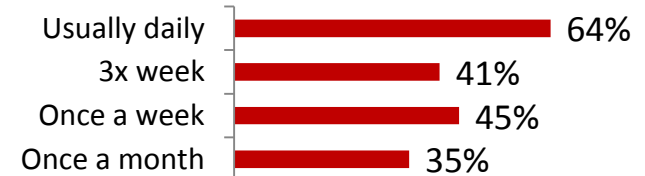
Regional Segmentation



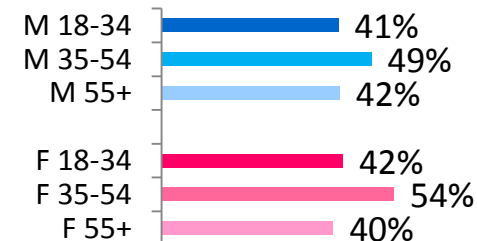
Have Visited Ontario Wine Country



Wine Consumption



Age-Gender



45%

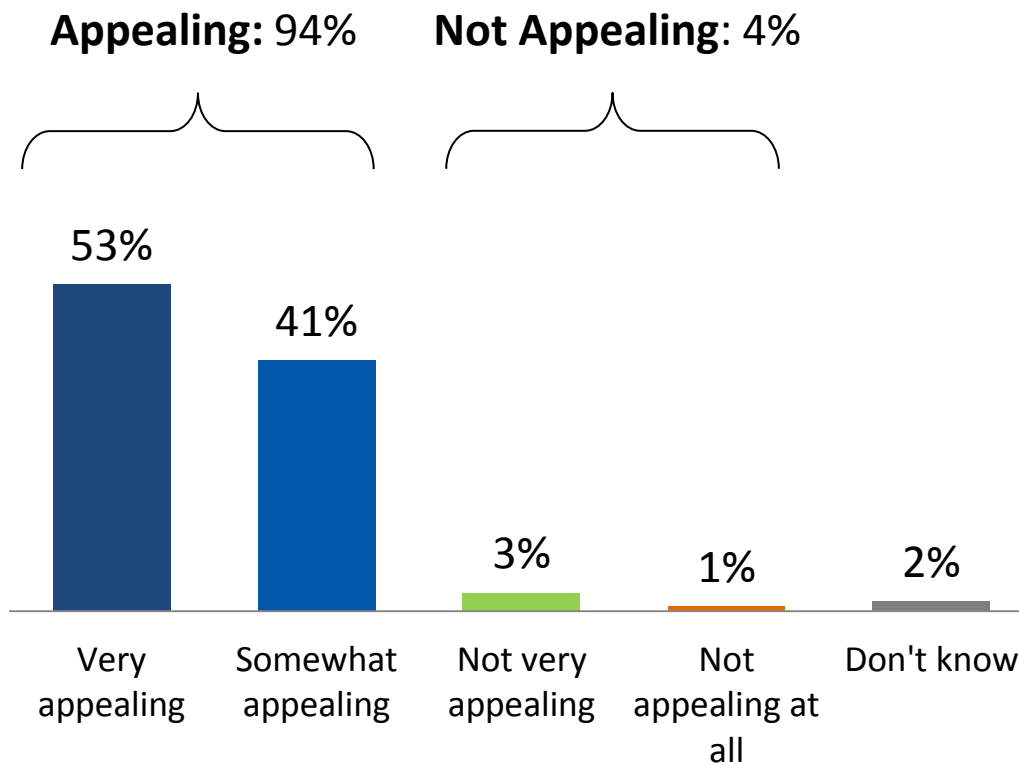
46%

Imagery: almost all (94%) of those who saw the ad campaign found the imagery 'very appealing'



How appealing did you find the imagery of the advertisement?

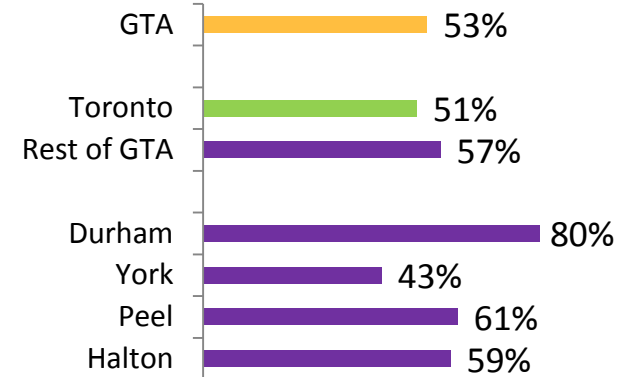
[asked only of those who recalled seeing the campaign ads; n=378]



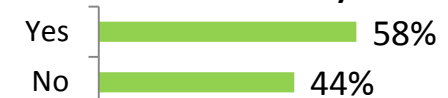
2013 GTA Sample Breakdown ►►

Respondents who found ads "very appealing":

Regional Segmentation



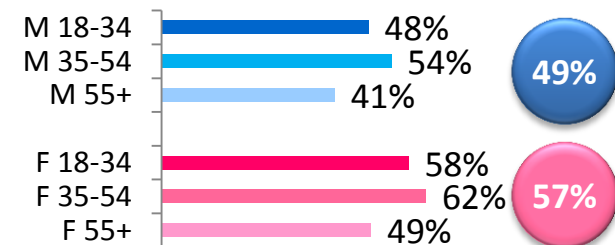
Have Visited Ontario Wine Country



Wine Consumption



Age-Gender

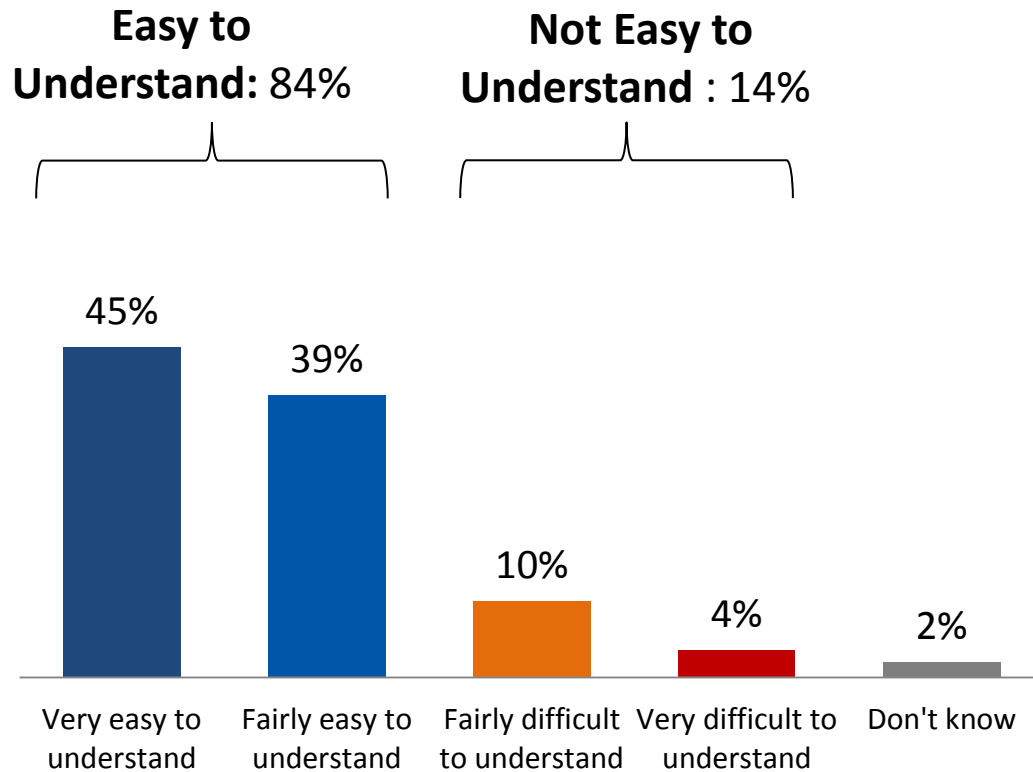


Ease of understanding: Over 8-in-10 (84%) who saw the ad campaign believe it was easy to understand



How easy was it to understand the advertising?

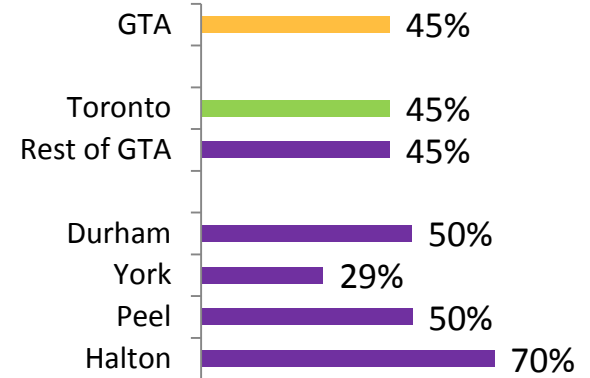
[asked only of those who recalled seeing the campaign ads; n=378]



2013 GTA Sample Breakdown ►►

Respondents who found ads "very easy to understand":

Regional Segmentation



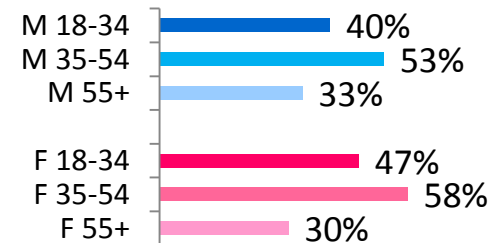
Have Visited Ontario Wine Country



Wine Consumption



Age-Gender



44%

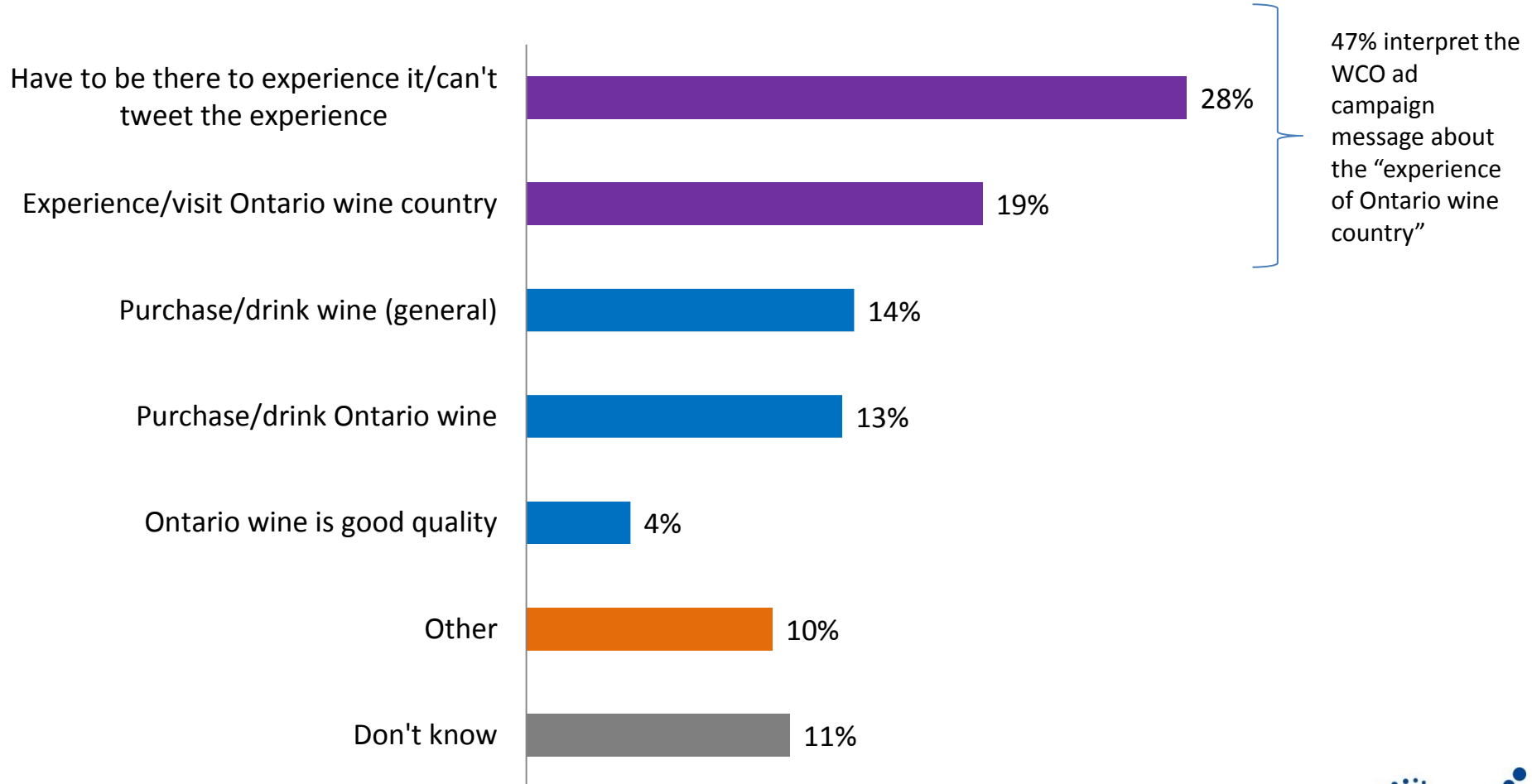
46%

Campaign Message: almost half (47%) who saw the ads understood the message was about the “experience”



What do you think the main message of the advertising is?

[asked only of those who recalled seeing the campaign ads; n=378]



Ad Campaign Impact

Post-ad campaign survey ►►

August 2013

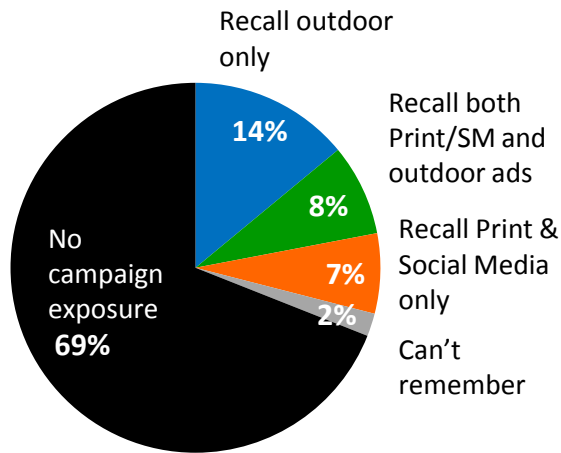
Ad Effectiveness: respondents say ads strongly increase the likelihood they will visit Ontario's wine country



Are you more or less likely to go to **Ontario's wine country** after having seen this advertisement?

[asked of all respondents who recalled seeing the campaign ads; n=378]

GTA Ad Campaign Recall



	Recall only outdoor ads	Recall both outdoor and outdoor and Print/SM	Recall only Print/Social Media	GTA Average
	n = 170	n = 98	n = 83	n = 378
Total More likely	64%	78%	59%	65%
A lot more likely	26%	35%	20%	26%
Somewhat more likely	37%	43%	39%	39%
Neither more nor less likely	30%	21%	41%	31%
Somewhat less likely	3%	0%	0%	1%
A lot less likely	2%	0%	0%	1%
Total Less likely	5%	0%	0%	2%
NET LIKELIHOOD	+59%	+78%	+59%	+62%

Note: "Don't know" not shown

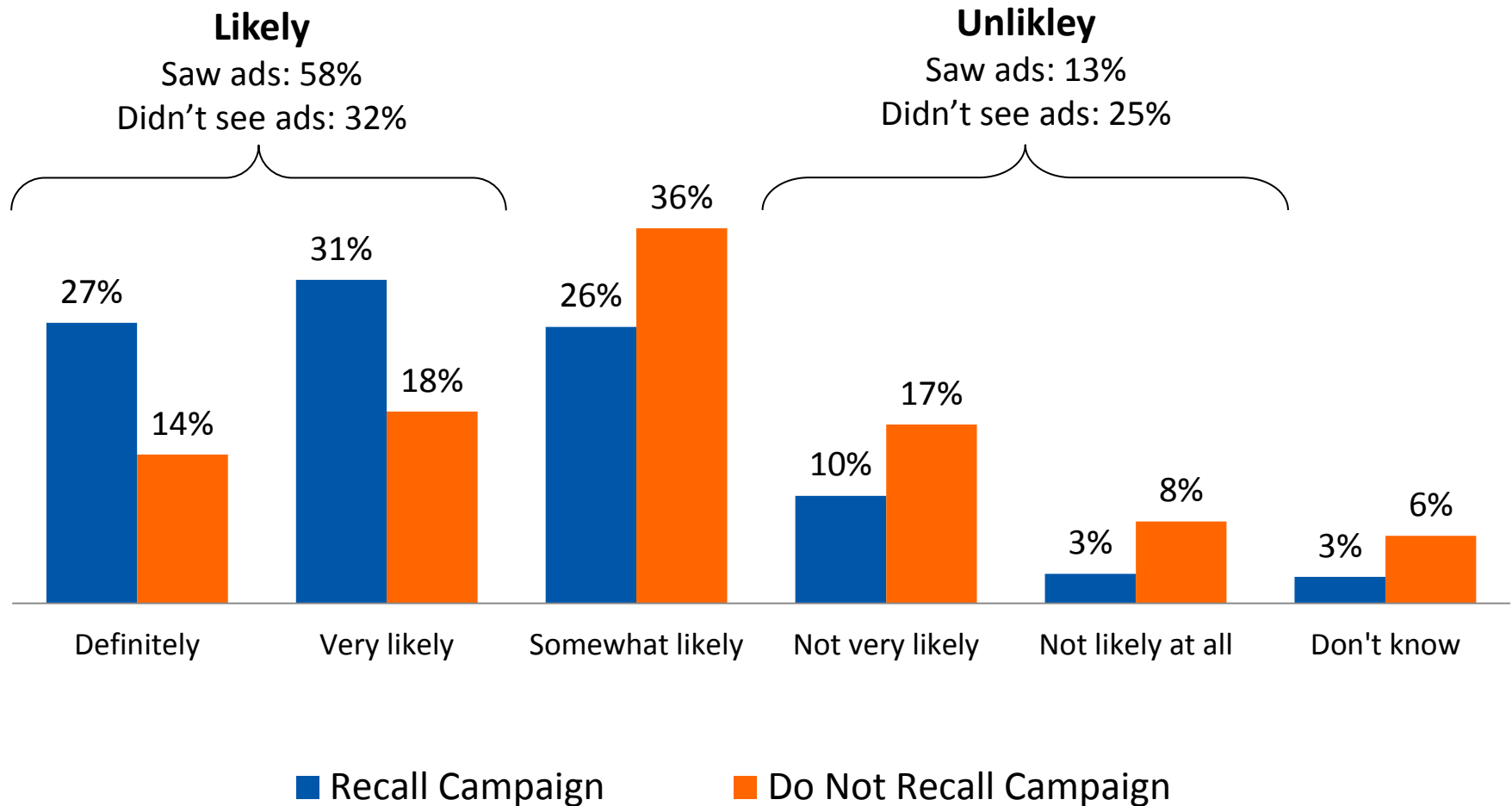
Over half of GTA respondents say they are more likely to visit Ontario's Wine Country after being exposed to either the outdoor ads or the print placements / social media. However, when respondents are exposed to both outdoor and the print ads / social media, the complementary impact on reported likelihood to visit wine country increases to 78%.

Campaign Impact: those exposed to ads most likely to visit wine country than those who didn't see the ads

Q

How likely are you to visit a winery in **Ontario** in the **next 12 months**?

[asked of all respondents]



Attitudes in the GTA

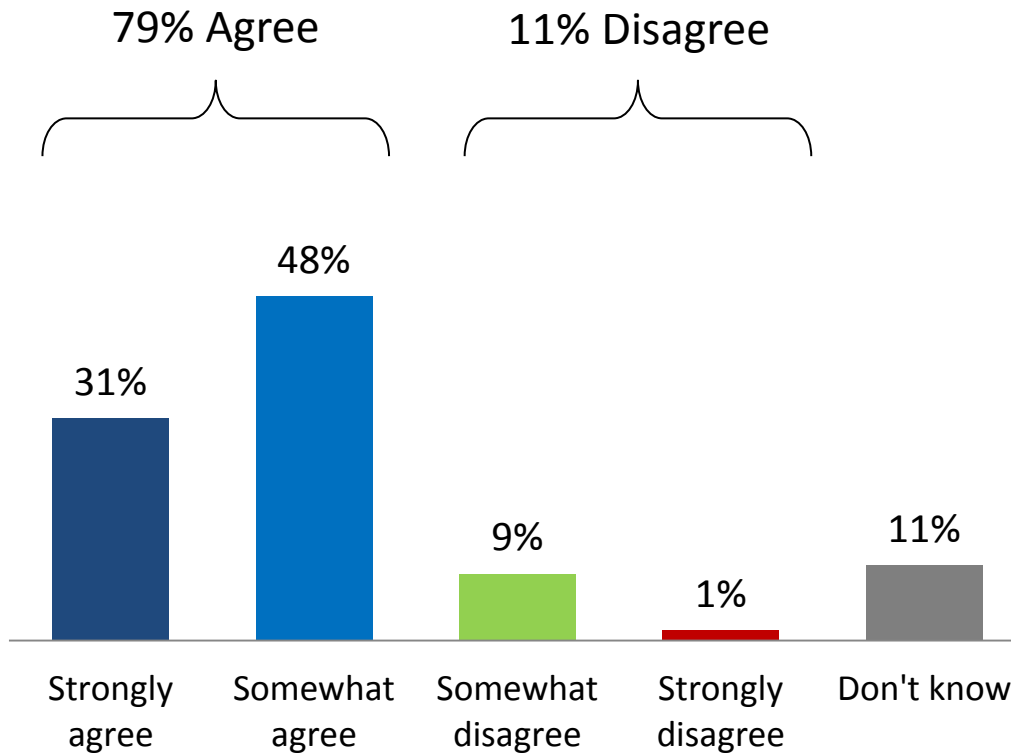
Attitudes and beliefs about Ontario Wine Country

Attitude towards Wine Country: a majority believe there is a lot to do in Wine Country; especially if you've been before

Q

For each of the following statements, please indicate if you agree or disagree: ***There is so much to do in wine country Ontario, aside from visiting wineries.***

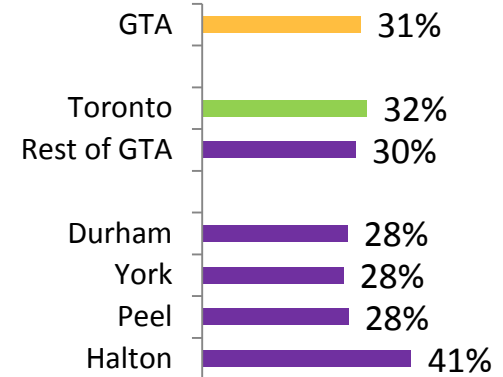
[asked of all respondents]



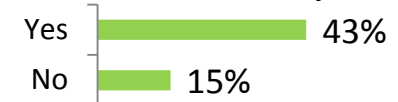
2013 GTA Sample Breakdown ▶▶

Respondents who "strongly agree":

Regional Segmentation



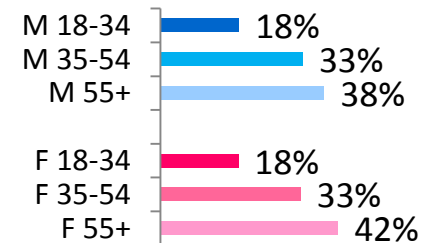
Have Visited Ontario Wine Country



Wine Consumption



Age-Gender



30%

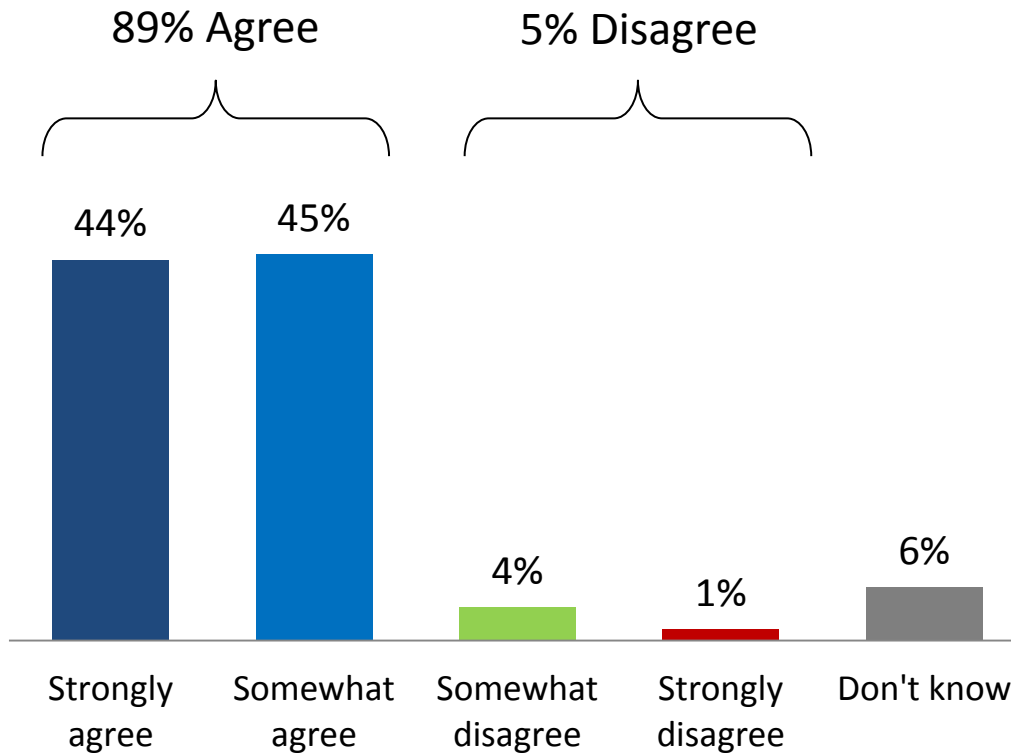
31%

Attitude towards Wine Country: 9-in-10 agree, visiting wine country is a great way to spend time outside GTA

Q

For each of the following statements, please indicate if you agree or disagree: **Visiting wine country is a great way to spend time out of the GTA**

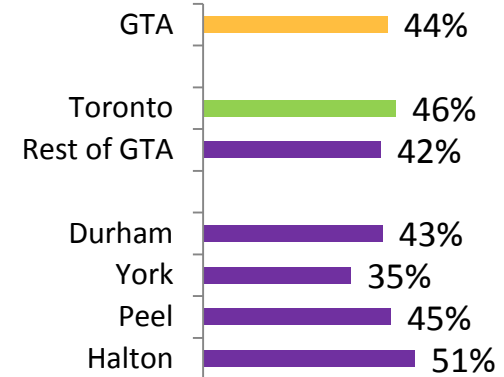
[asked of all respondents]



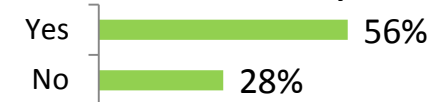
2013 GTA Sample Breakdown ►►

Respondents who "strongly agree":

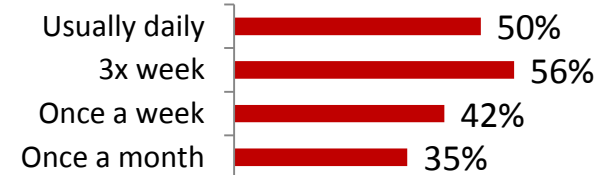
Regional Segmentation



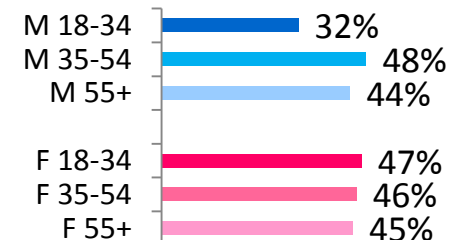
Have Visited Ontario Wine Country



Wine Consumption



Age-Gender



42%

46%

Social Media Channels

Post-ad campaign survey ►►

August 2013

GTA Social Media Tools: Facebook, YouTube, and Twitter

most “actively used” by target consumers

41

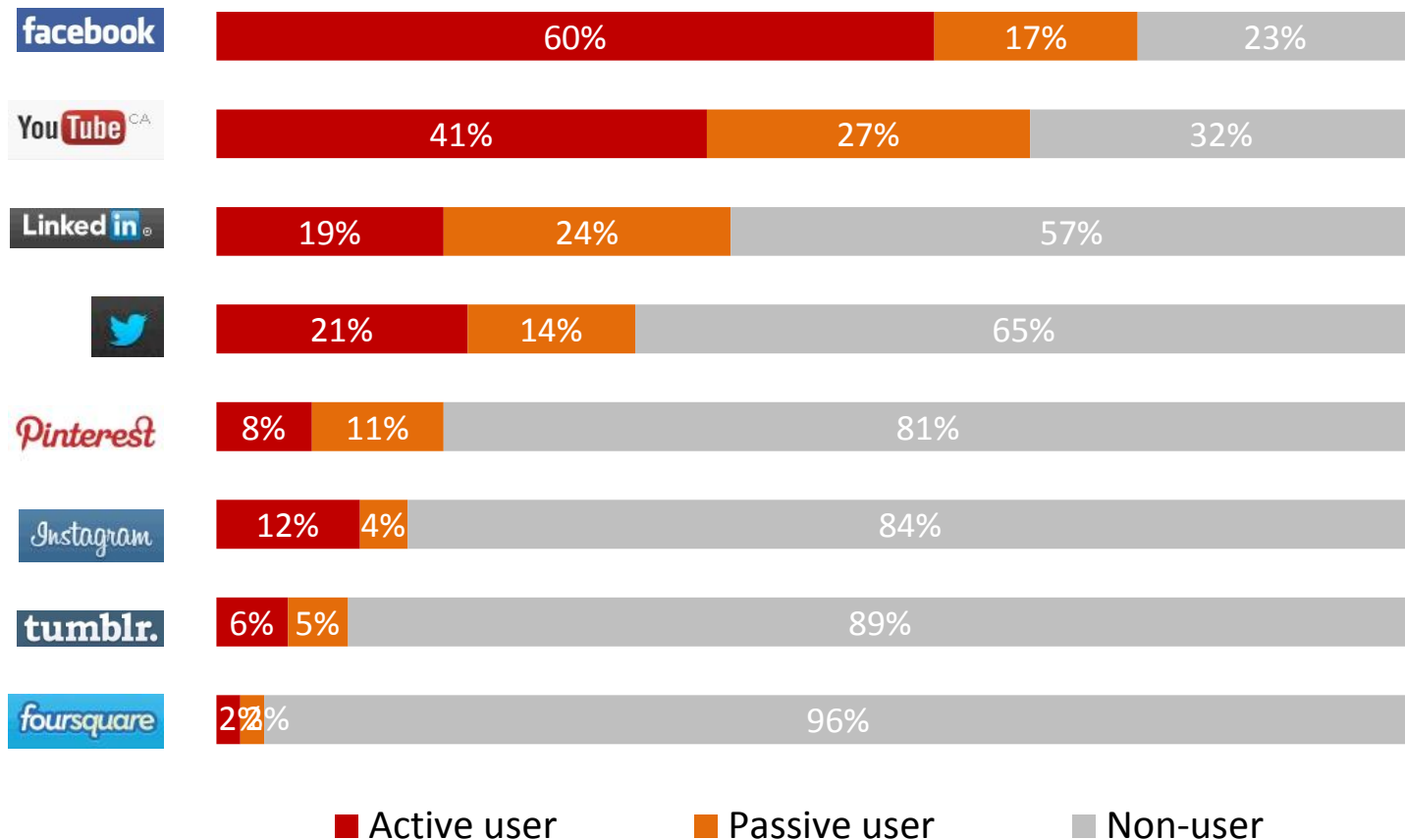
Q

Do you use any of the following social networking sites? → *Yes (user)* or *No/Don't know (non-user)*

[asked of all respondents]

Did you happen to use [insert name] yesterday? → *Yes (active users)* or *No/Don't know (passive users)*

[each social media tool only asked of users of the platform]

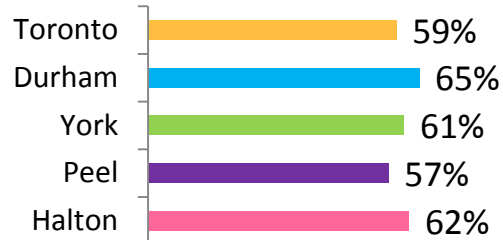


Social Media: Active User Profiles

Active Facebook Users: 60%



Regional Segmentation



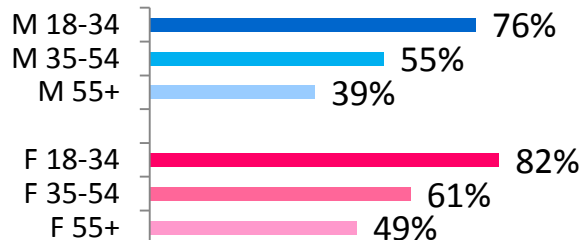
Have Visited Ontario Wine Country



Wine Consumption



Age-Gender



57%

63%

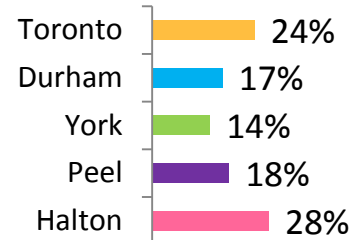
Exposed to Social Media Campaign (4% Average)

6% of Active Facebook users were exposed to WCO Social Media Campaign

Active Twitter Users: 21%



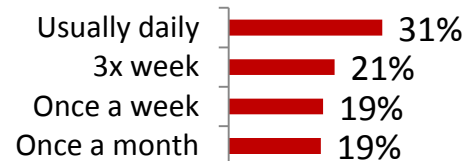
Regional Segmentation



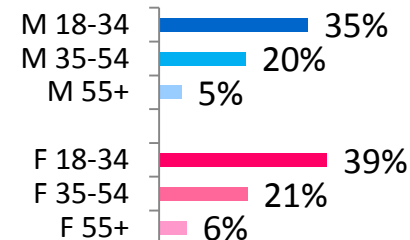
Have Visited Ontario Wine Country



Wine Consumption



Age-Gender



20%

22%

Exposed to Social Media Campaign (4% Average)

11% of Active Twitter users were exposed to WCO Social Media Campaign

Summary

Key Findings

Campaign Awareness ▶▶

- 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%**. However, when adjusted to reflect the sample from previous years of polling ([**older**] 25 years or older and [**more affluent**] household income of \$80k+) the outdoor campaign recall among “**adjusted**” consumers in Toronto was **27%** 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.

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 take-aways.

Ad Campaign Impact

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.



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