

Innovative Research Group, Inc.

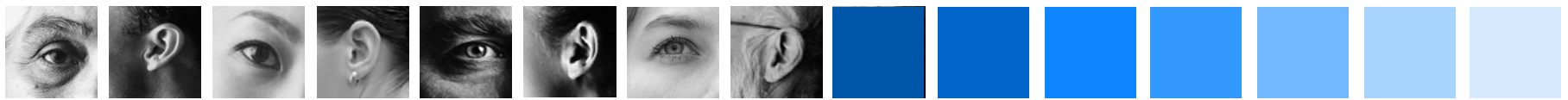
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*Ad Tracking and Testing ►►*

# Ontario Wine Country Campaign



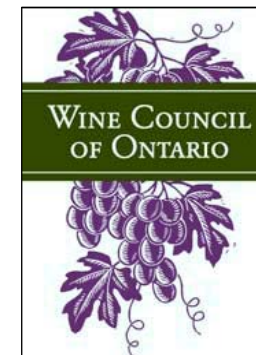
Prepared for:

**Wine Council of Ontario**

110 Hannover Drive, Suite B205

St. Catharines, Ontario

L2W 1A4



**September 17<sup>th</sup> 2010**

**:: Final Report ::**

STRICTLY PRIVILEGED AND CONFIDENTIAL

# Methodology

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- These are the findings of an **Innovative Research Group** (INNOVATIVE) online survey poll conducted from August 13 and August 26, 2010 for the **Wine Council of Ontario**.
- The online survey is based on **601 surveys completed** among qualified respondents. Respondents only qualified to complete the survey if they met the following criteria:
  - **Location:** Toronto-based resident;
  - **Income:** household income of \$80k or more;
  - **Age:** 25 years of age or older; and
  - **Wine consumer:** has drank at least one glass of wine over past 3 months.
- The sample has been weighted for age, gender and region of Toronto using Statistics Canada's 2006 Census data to reflect actual demographic breakdown.
- An probability sample of this size (n=601) would have an estimated **margin of error of  $\pm 4.0$  percentage points**, 19 times out of 20.
- The margin of error will be larger within each sub-grouping of the sample.

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

# Target Audience Characteristics

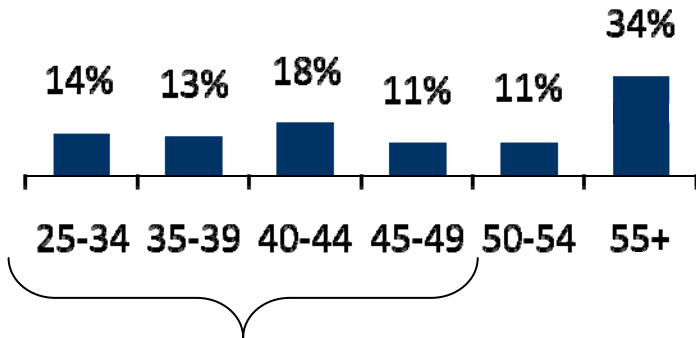
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*Setting the context*

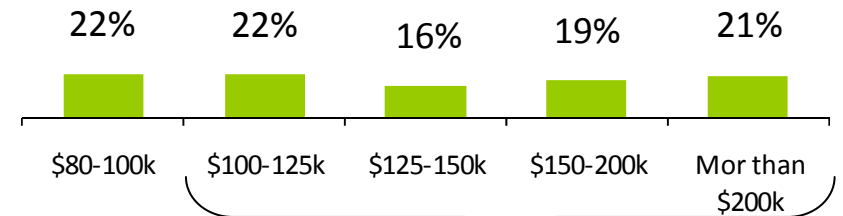


# Demographic Segmentation: *Respondent Profile*

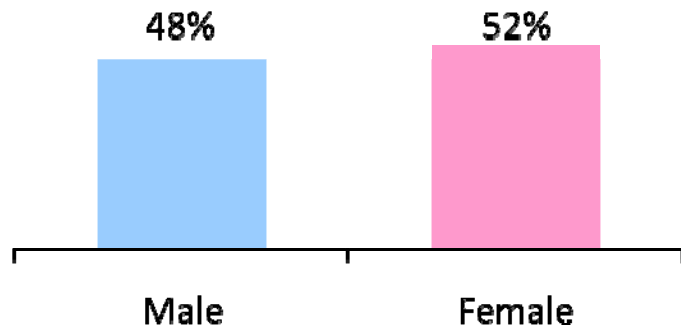
Age



Household Income

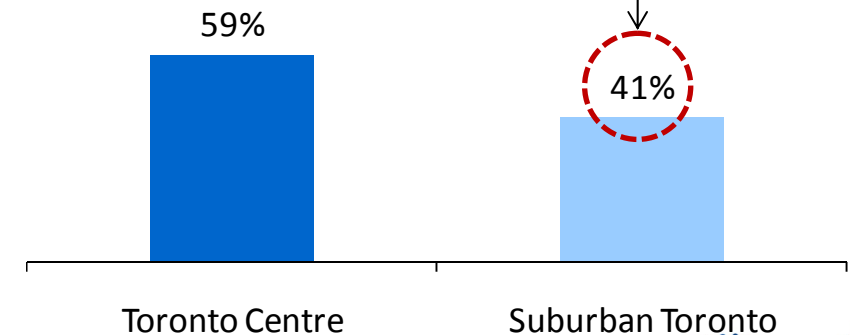


Gender



Includes *North York, East York, York and Etobicoke*

Region

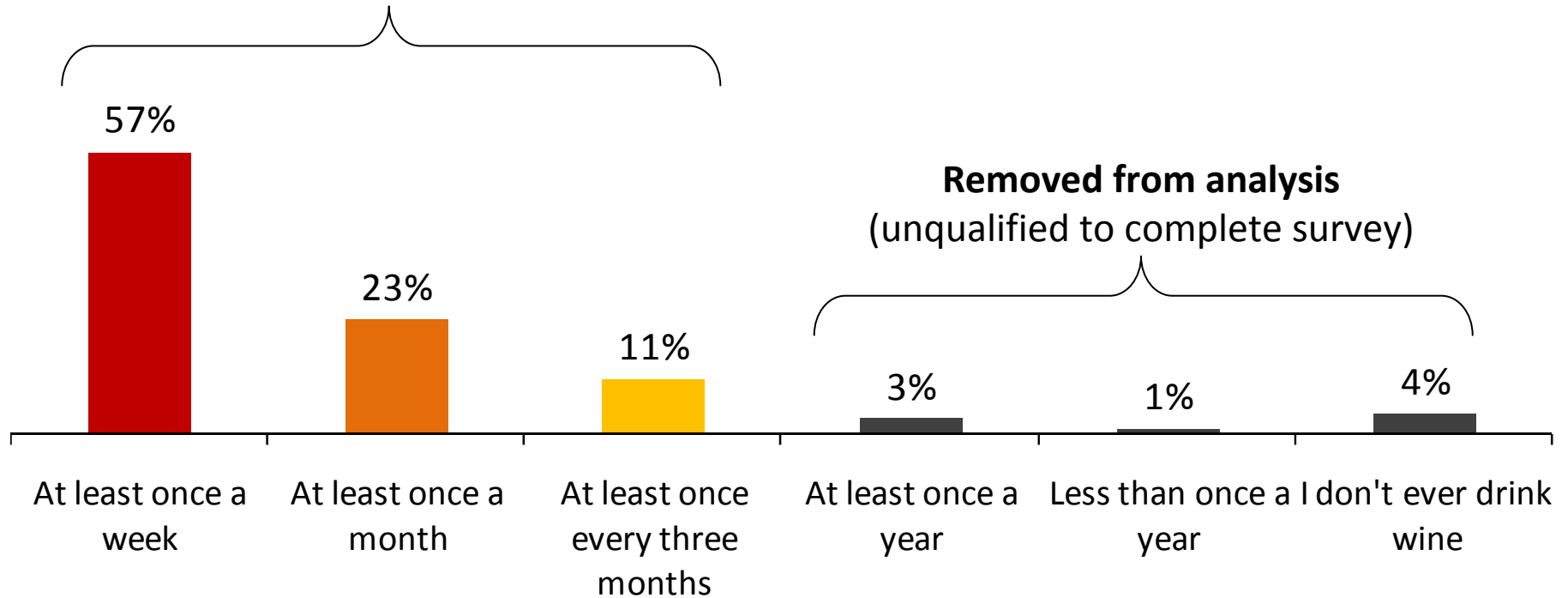


## Frequency of wine consumption: *unweighted*

Q

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

**Roughly 91% of Torontonians drink wine  
at least once every three months**



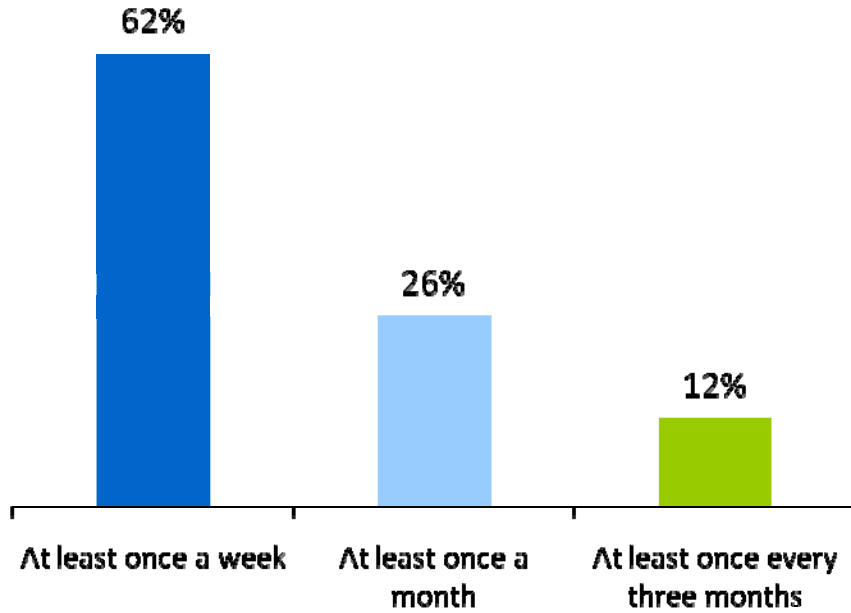
**unweighted; n=687**



## Frequency of wine consumption: *weighted*



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



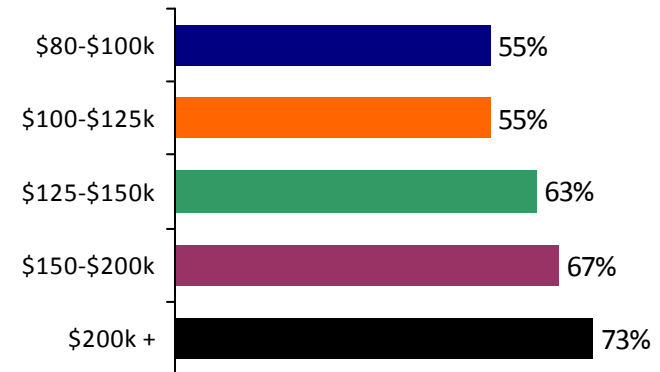
weighted; n=601



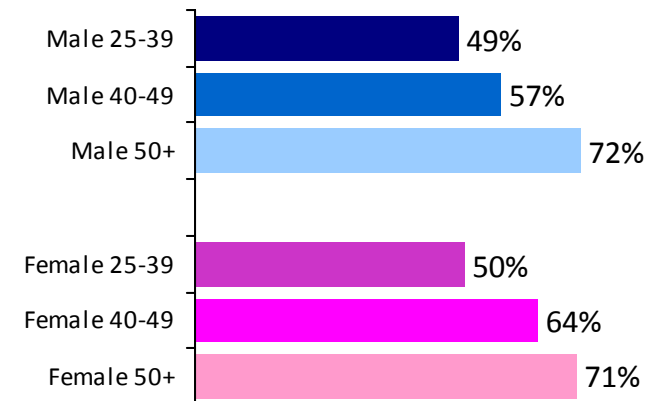
### Sample Breakdown ►►

*Respondents who drink wine at least once a week:*

#### Household Income Segmentation



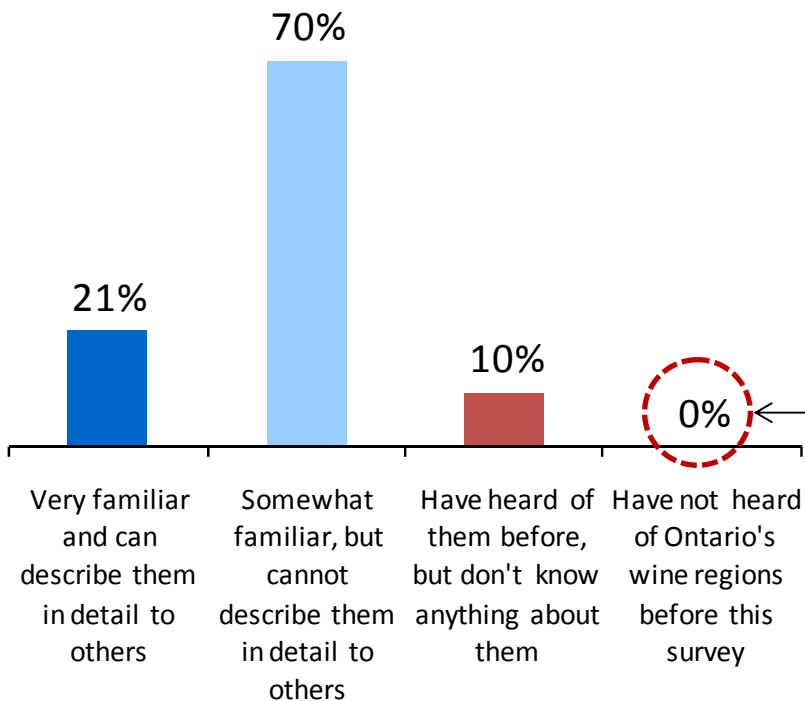
#### Age-Gender Grouping



# Majority of target consumers familiar with Ontario's wine regions; male consumers most familiar <sup>7</sup>



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

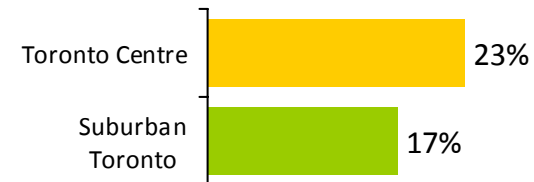


No respondent say have said they have not heard of **Ontario's wine regions** before

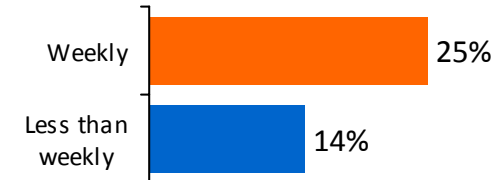
## Sample Breakdown ▶▶

*Respondents who say they are very familiar:*

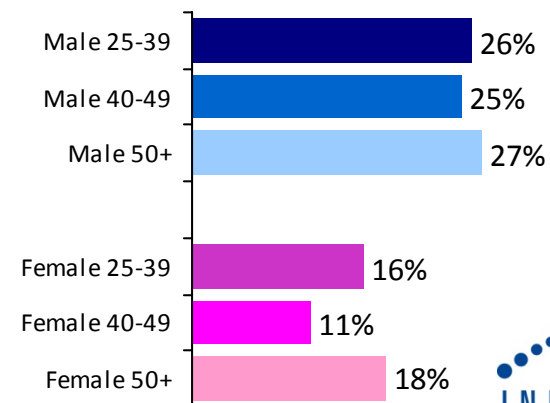
### Regional Breakdown



### Wine Consumption



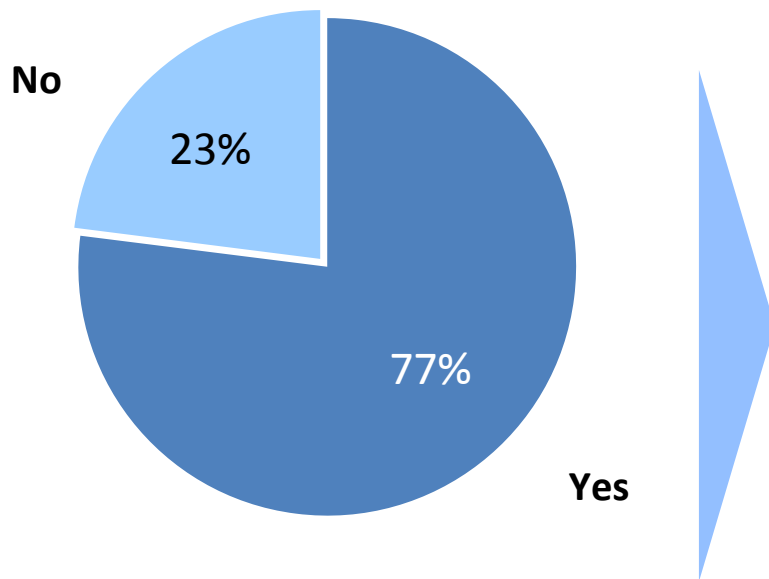
### Age-Gender Grouping



# Over 3-in-4 (77%) have travelled to Ontario's wine regions



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



## Sample Breakdown ▶▶

*Torontonians who have visited an Ontario winery:*

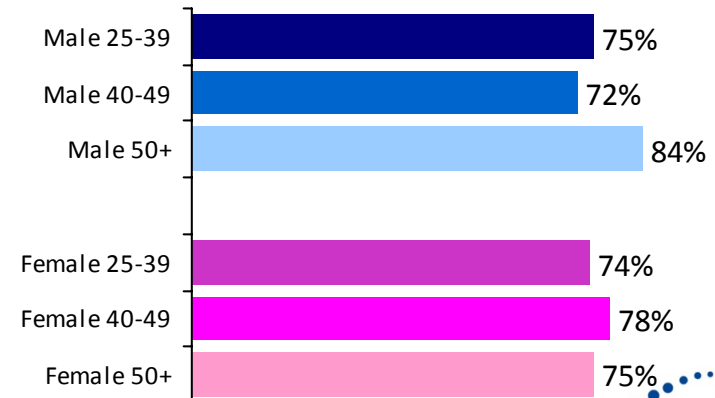
### Regional Breakdown



### Wine Consumption



### Age-Gender Grouping





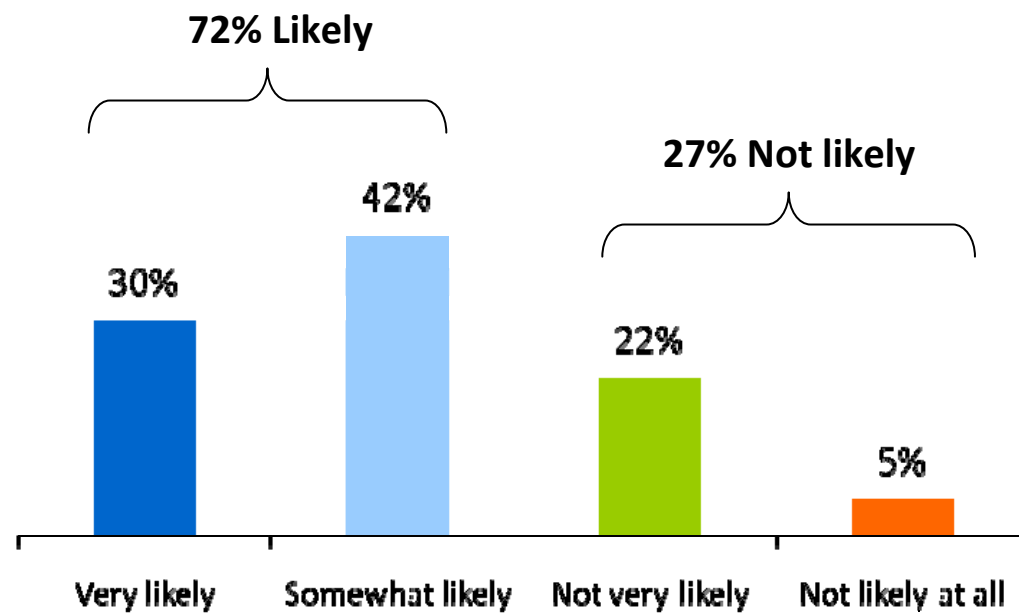
# Just under 3-in-4 (72%) are likely to visit Ontario's wine regions within the next year



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

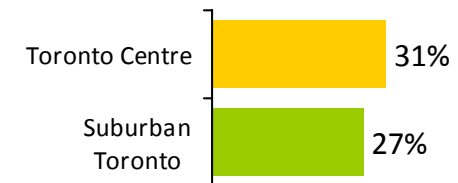
**Sample Breakdown ►►**

*Torontonians who say very likely:*

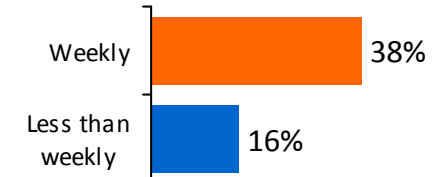


'Don't know' (2%) not shown

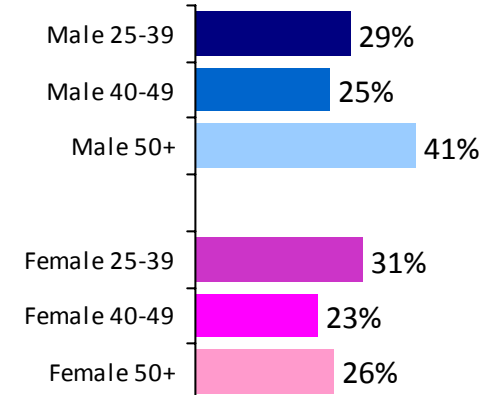
## Regional Breakdown



## Wine Consumption



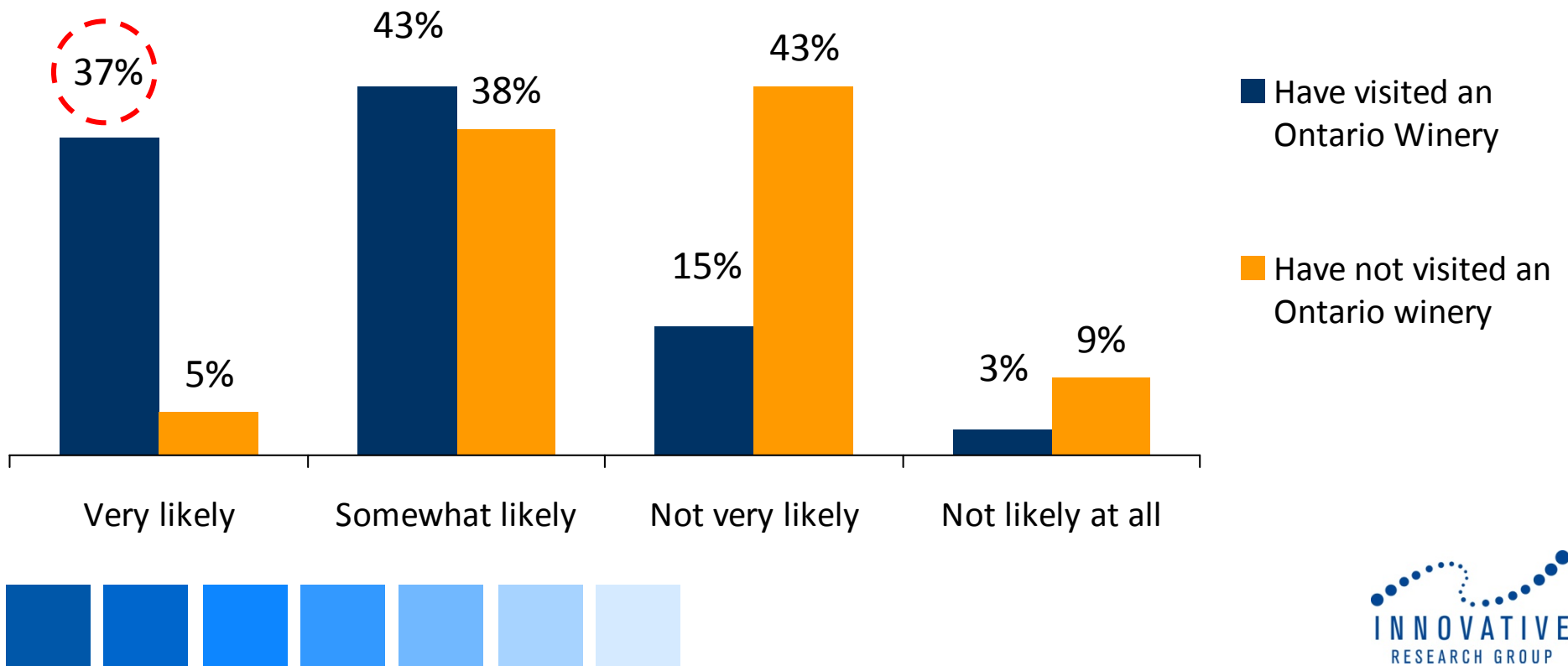
## Age-Gender Grouping



## To know Ontario's wine regions is to love them

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

Only **5%** of Torontonians who have never visited an Ontario winery say they're very likely to visit an Ontario winery in the next 12 months vs. **37%** who have visited an Ontario winery in the past.



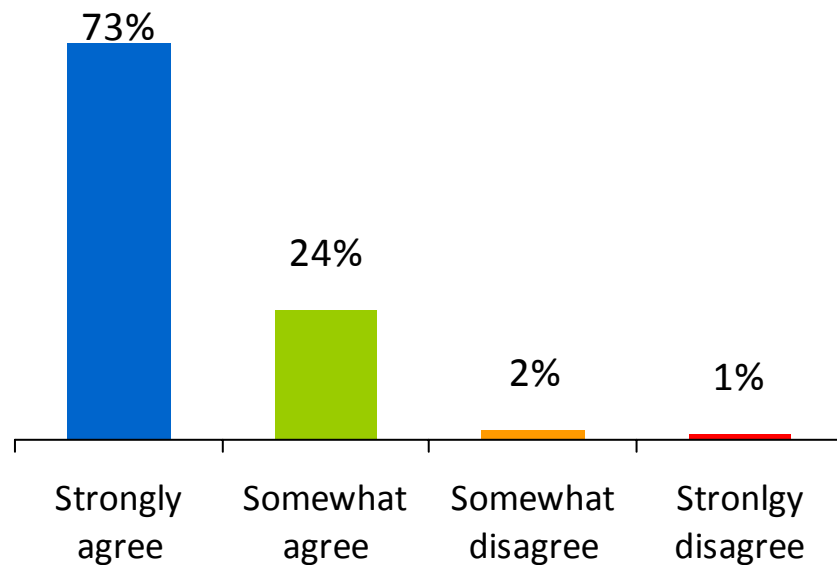
# Quality of Ontario wine improving and regions easily accessible to Torontonians

- Over half strongly agree that the quality of Ontario's wine has improved.
- Approximately 3-in-4 strongly agree that Ontario's wine region can easily be visited in a day.



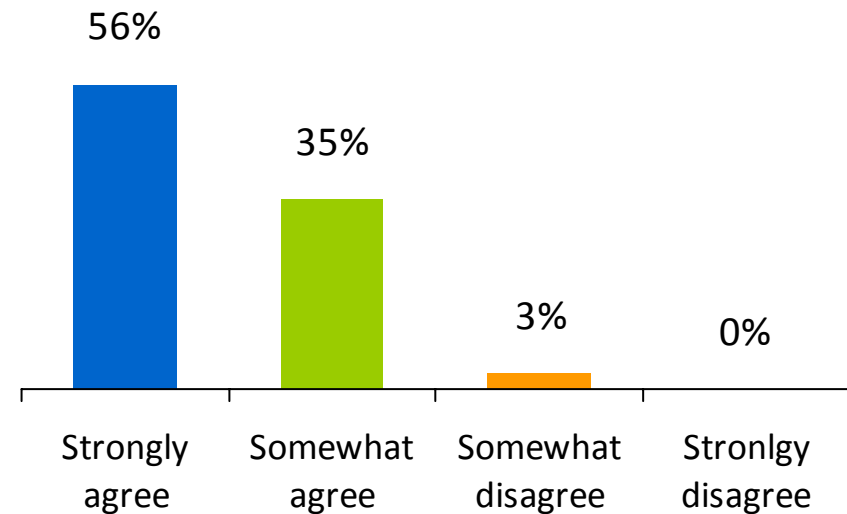
For each of the following statements, please indicate if you agree or disagree:

***Visiting Ontario's wine country can easily be done on a day trip.***



'Don't know' (0%) not shown

***The quality of Ontario wines has improved significantly over the last decade.***



'Don't know' (6%) not shown

# Campaign Awareness

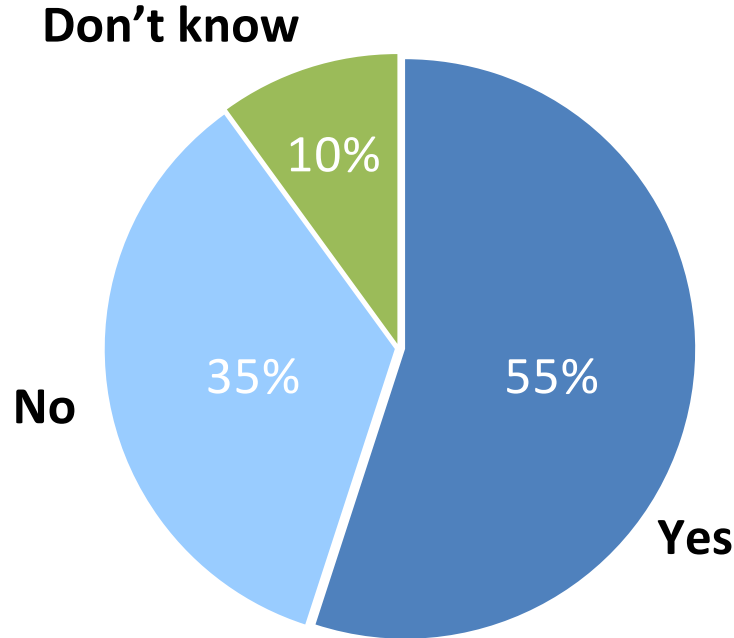
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# Over half (55%) have read, seen or heard something about Ontario's wine country within the last month



Have you read, seen or heard anything about Ontario's wine country in the last month or so?



## Sample Breakdown ►►

*Torontonians who say have R/S/H something about Ontario's wine country:*

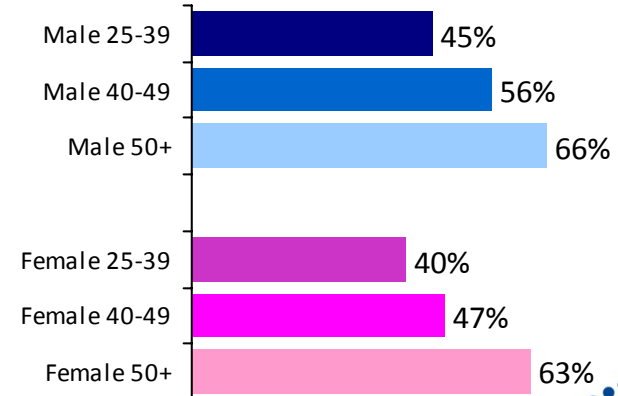
### Regional Breakdown



### Wine Consumption



### Age-Gender Grouping



# Overall, 18% of target consumers recalling seeing a Ontario Wine Country ad over the last month



Do you recall seeing any bus shelter posters or billboards advertising **Ontario's wine country** in the last month or so?

Multiple Mention: percentages will not equal 100%

Asked only among the 55% of Torontonians who recall seeing RHS something about Ontario Wine Country in the last month (n=328)

	Toronto-wide	M 18-39	M 40-49	M 50+	F 25-39	F 40-49	F 50+	Urban	Suburban	Weekly	Less than weekly
Yes - Poster	25%	44%	37%	23%	9%	27%	17%	26%	23%	23%	27%
Yes - Billboard	18%	33%	24%	13%	24%	14%	13%	16%	21%	17%	20%
No	48%	33%	37%	51%	52%	49%	56%	46%	52%	51%	41%
Don't know	19%	14%	13%	19%	21%	17%	23%	20%	16%	18%	20%

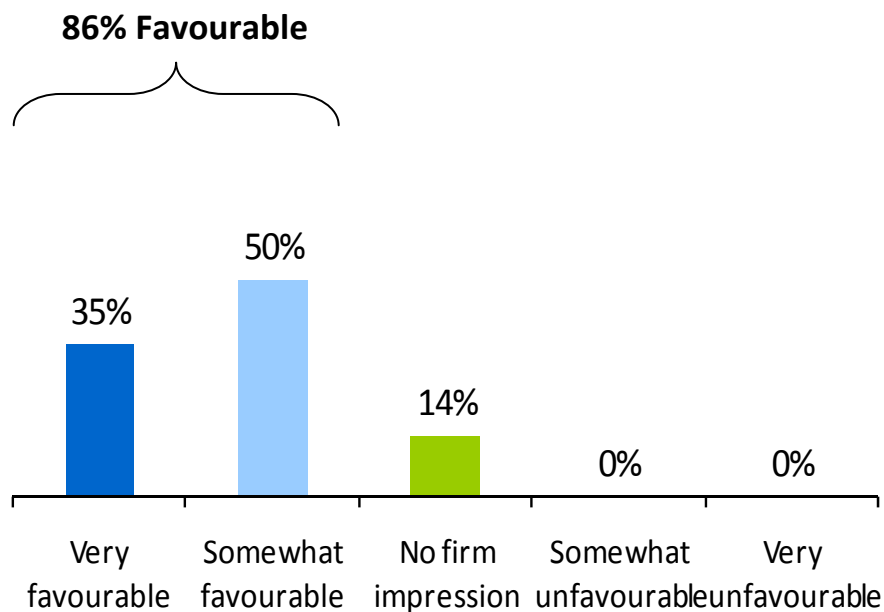


# Almost 9-in-10 (86%) were left with a favourable impression of Ontario's wine country advertisement



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

[Asked among 18% of respondents; n=110]

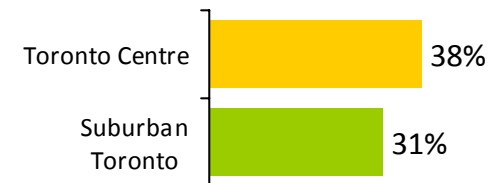


**Note:** 'Don't know' (0%) not shown

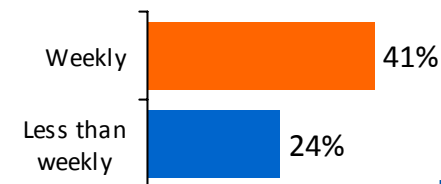
## Sample Breakdown ▶▶

*Torontonians who had a very favourable impression of the ads:*

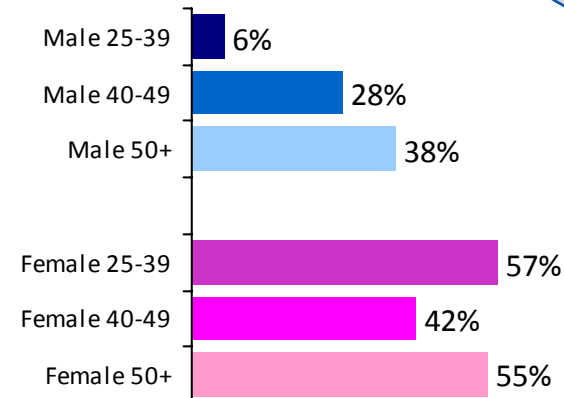
### Regional Breakdown



### Wine Consumption



### Age-Gender Grouping



Total Male

25%

51%

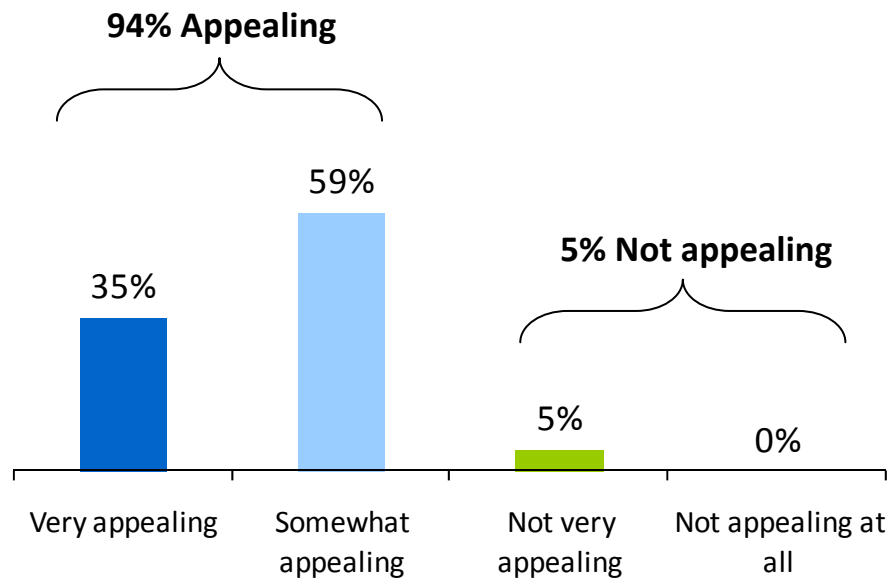
Total Female

# Almost all respondents (94%) found the ad imagery appealing



How appealing did you find the imagery in the advertisement?

[Asked among 18% of respondents; n=110]

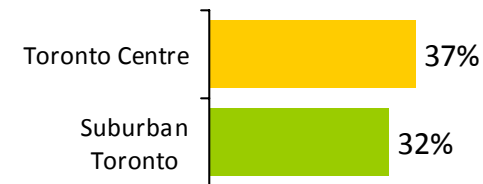


**Note:** 'Don't know' (1%) not shown

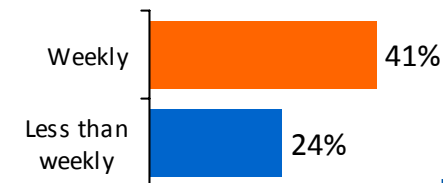
## Sample Breakdown ▶▶

*Torontonians who found the imagery in the ads very appealing:*

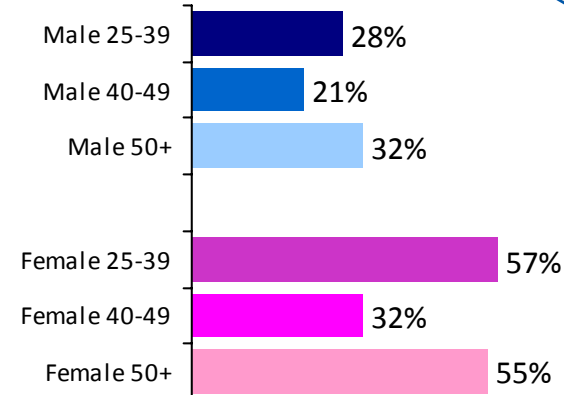
### Regional Breakdown



### Wine Consumption



### Age-Gender Grouping



Total Male

27%

48%

Total Female

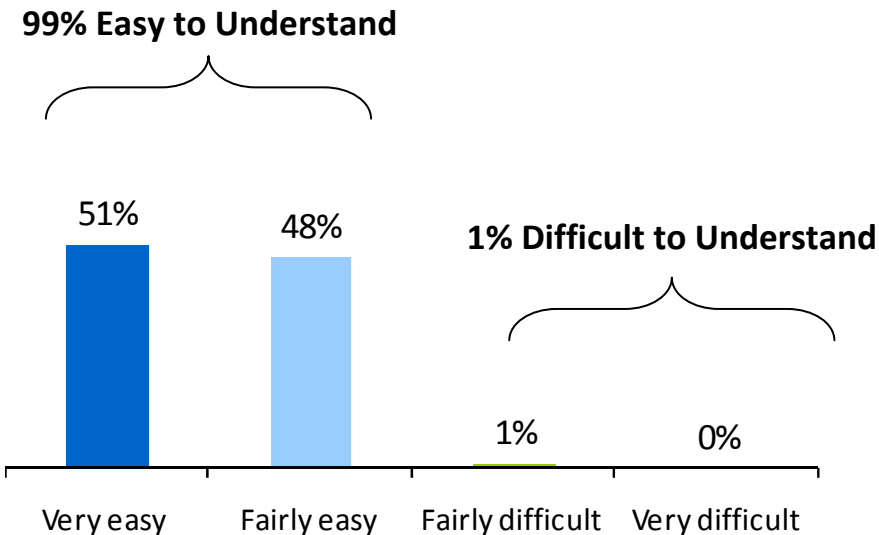


# Practically all respondents (99%) found the ads easy to understand



How easy was the bus shelter poster or billboard advertisement to understand?

[Asked among 18% of respondents; n=110]

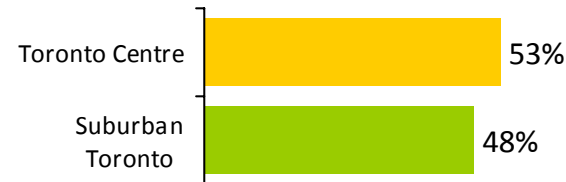


**Note:** 'Don't know' (0%) not shown

## Sample Breakdown ▶▶

*Torontonians who found the ads very easy to understand:*

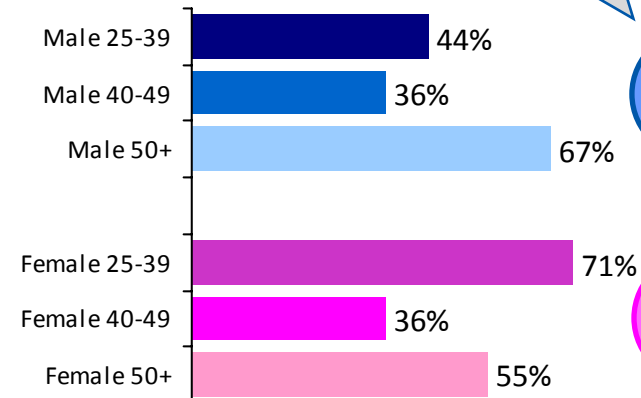
### Regional Breakdown



### Wine Consumption



### Age-Gender Grouping



Total Male

50%

Total Female

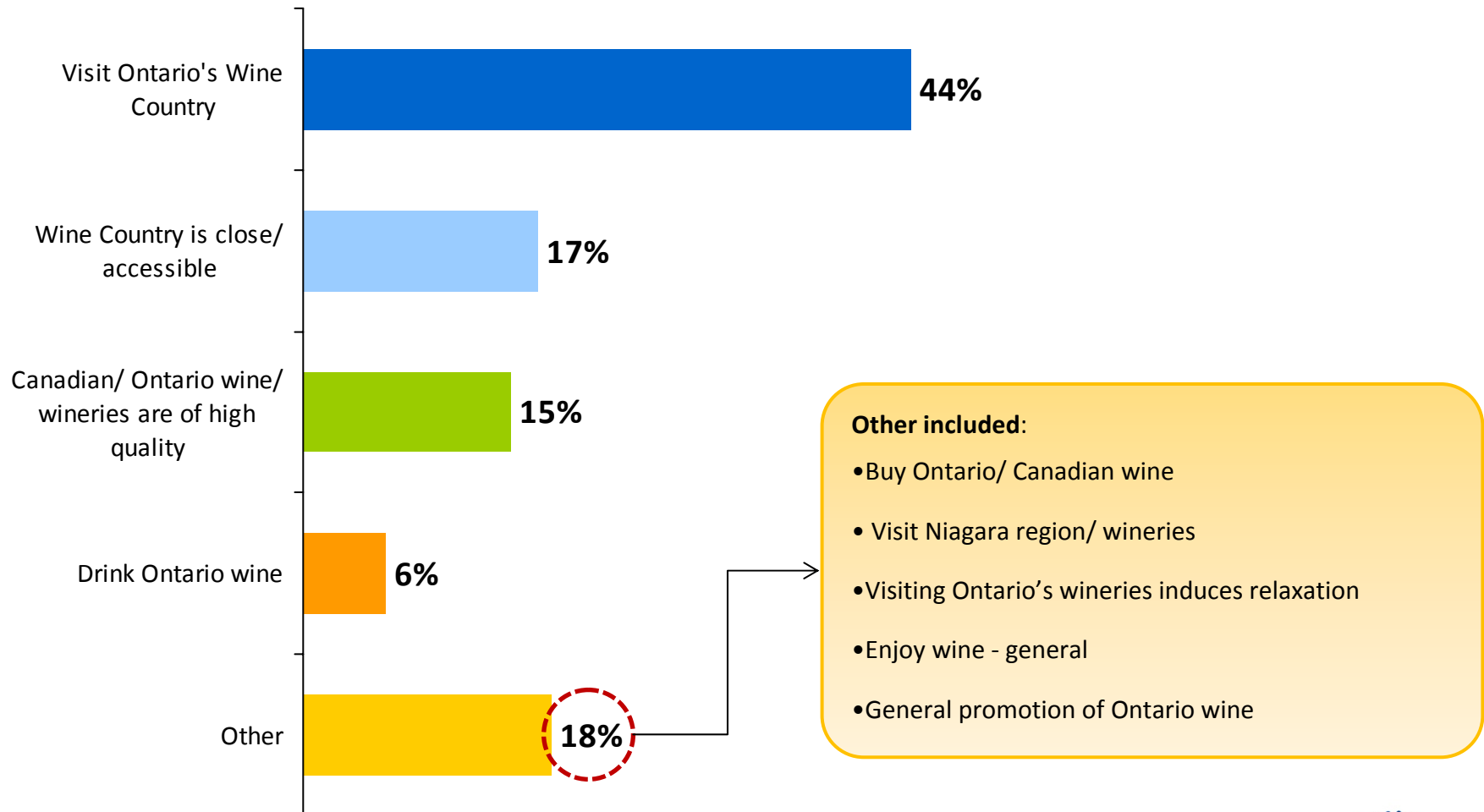
52%

# Close to half (44%) say the ad's main message is to "visit Ontario's wine country" <sup>18</sup>

Q

What do you think the main message of the bus shelter poster or billboard advertisement was?

[Asked among 18% of respondents; n=110]



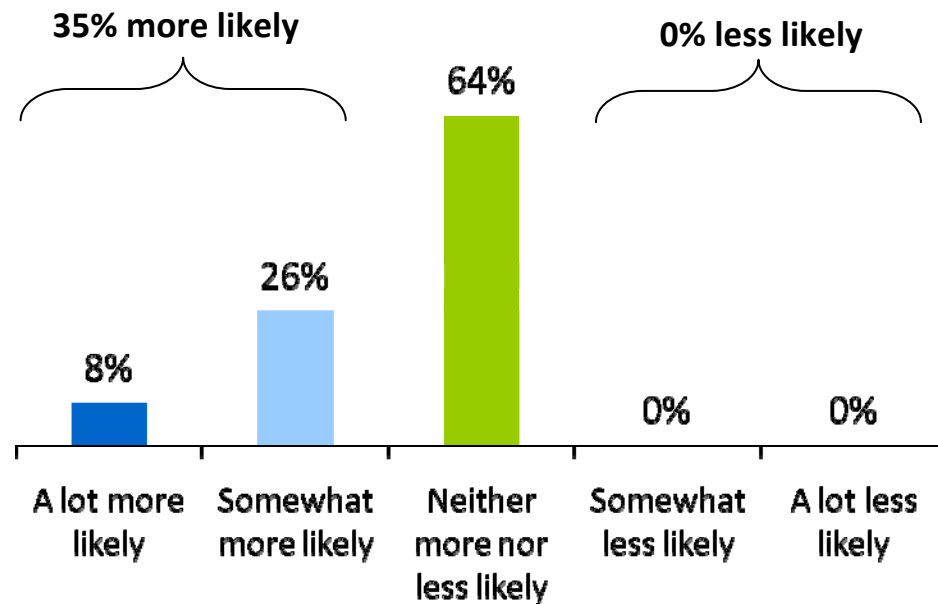
**Note:** 'Don't know' (12%) not shown

# Approximately 1-in-3 are more likely to visit Ontario's wine region after seeing the ad



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

[Asked among 18% of respondents; n=110]

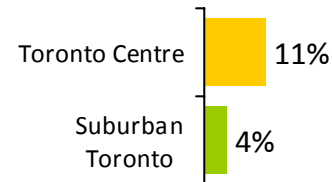


**Note:** 'Don't know' (1%) not shown

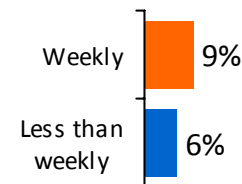
## Sample Breakdown ▶▶

*Torontonians who are a lot more likely to visit Ontario's wine country after having seen the ads:*

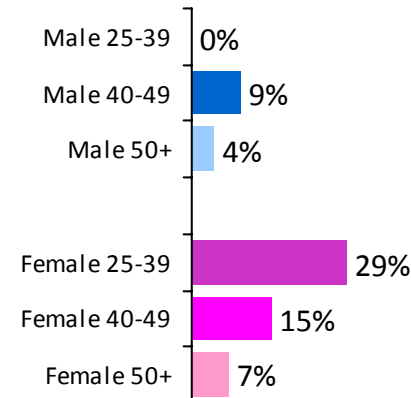
### Regional Breakdown



### Wine Consumption



### Age-Gender Grouping



Total Male

4%

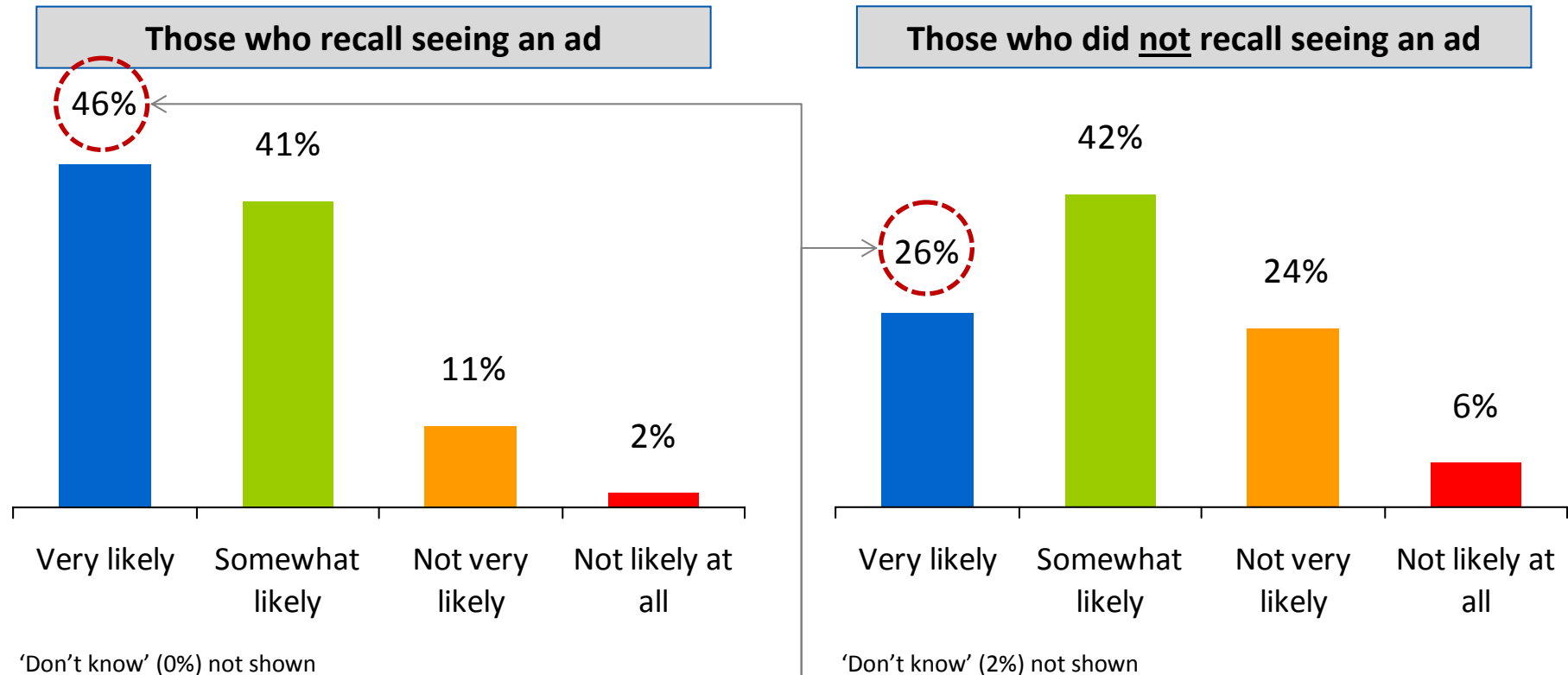
15%

Total Female

# The campaign is effective at encouraging target consumers<sup>20</sup> to visit a winery in Ontario's wine regions in the future



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



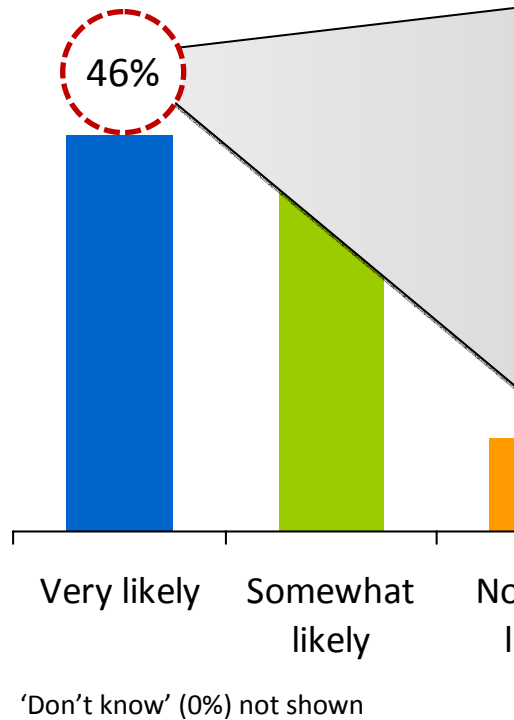
Respondent who were exposed to the *Ontario Wine Country* ad campaign are **almost twice as likely** as those who did not see the ads to say that they are “very likely” to visit a winery in Ontario's wine regions in the next 12 months.

## Segmentation: *those who recall seeing an ad ... and are “very likely” to visit an Ontario winery within the year*

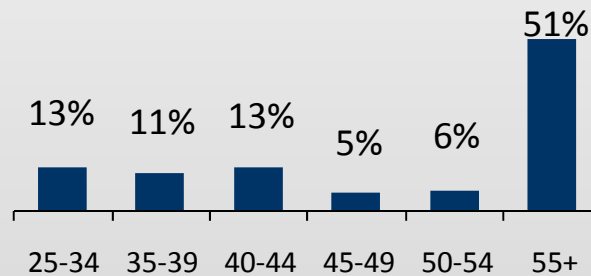
Q

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

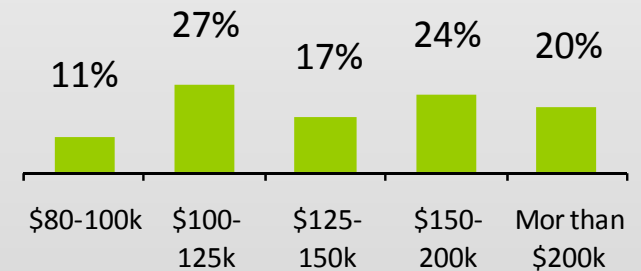
Those who recall seeing an ad



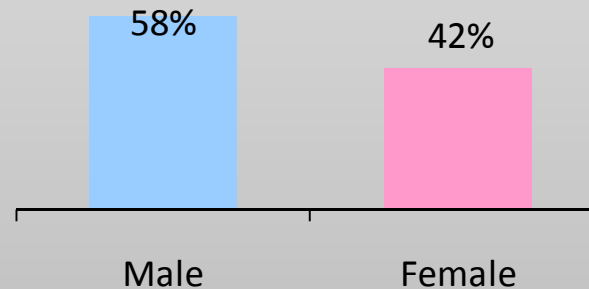
Age



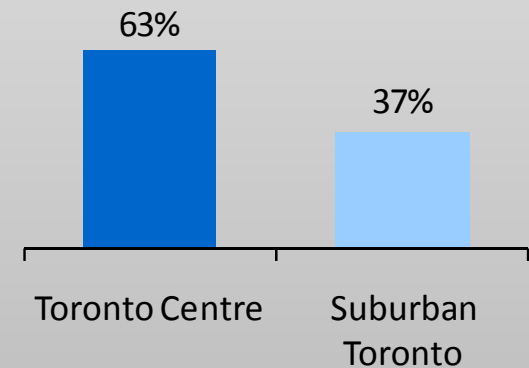
Income



Sex



Region



Small sample size (n=51); interpret as directional only

# Advertisement Assessment

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*Concept testing*



# Creative Concepts Tested

Three (3) ad concepts were tested in this study. A single ad concept was randomly assigned to each survey respondent to assess overall impact.

## Summer 2010 Ontario Wine Country Campaign



**Billboard Ad 1**  
(n=201)



**Billboard Ad 2**  
(n=200)



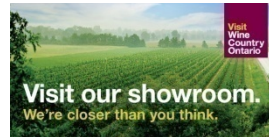
**Poster Ad 3**  
(n=200)

## Campaign Ads: overall impression

Q

Is your impression of the ad favourable or unfavourable?

- Among the advertisements run during the Ontario Wine Country Campaign, **“Billboard Ad 2”** (*Visit our showroom*) leaves the most favourable impression among survey respondents.



	Billboard AD1	Billboard AD2	Poster AD3	Average
Very favourable	22%	32%	31%	28%
Somewhat favourable	53%	48%	45%	49%
No firm impression	16%	18%	14%	16%
Somewhat unfavourable	7%	2%	9%	6%
Very unfavourable	0%	1%	2%	1%
Total	100%	100%	100%	100%
Favourable	76%	80%	76%	77%
Unfavourable	8%	3%	10%	7%
Net Favourable	68%	77%	66%	70%



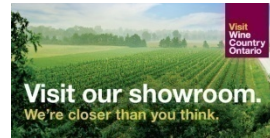


## Campaign Ads: *imagery*

Q

How appealing did you find the imagery in the advertisement?

- Although Billboard Ads 1 and 2 have identical imagery, respondents exposed to Ad 2 ranked its imagery with the highest net appeal.



	Billboard AD1	Billboard AD2	Poster AD3	Average
Very appealing	33%	35%	39%	35%
Somewhat appealing	53%	57%	47%	52%
Not very appealing	13%	8%	11%	11%
Not appealing at all	0%	1%	4%	2%
Don't know	1%	0%	0%	0%
Total	100%	100%	100%	100%
Appealing	86%	91%	86%	88%
Not Appealing	13%	9%	14%	12%
Net Appeal	72%	82%	72%	75%

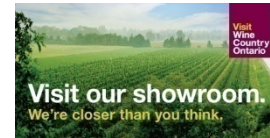


## Campaign Ads: *ease of understanding*

Q

How easy was this ad to understand?

- Although all three concepts are almost universally understood, respondents find “**Billboard Ad 2**” (*Visit our showroom*) slightly easier to understand than the other two campaign ad concepts.



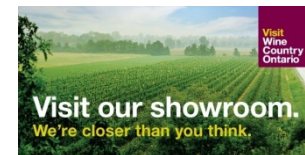
	Billboard AD1	Billboard AD2	Poster AD3	Average
Very easy to understand	58%	67%	63%	62%
Fairly easy to understand	36%	32%	34%	34%
Fairly difficult to understand	4%	1%	4%	3%
Very difficult to understand	1%	1%	0%	1%
Don't know	0%	0%	0%	0%
Total	100%	100%	100%	100%
Easy	95%	99%	97%	97%
Difficult	5%	2%	4%	3%
Net Ease of Understanding	90%	97%	93%	93%



## Campaign Ads: *messages*

**Q** What do you think the main message of this advertisement is?

- 8-in-10 people exposed to the campaign's creative understand that the message is about getting people to visit Ontario's wine country OR informing them that the regions are close / easy to get to.



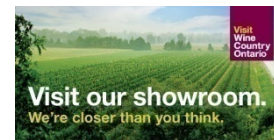
Main Message	AD1	AD2	AD3	Average
Visit Ontario's wine country	43%	47%	38%	<b>43%</b>
Wine Country is close/easy to get to	33%	39%	38%	<b>37%</b>
A visit to Ontarios wine region reduces stress	9%	0%	7%	<b>5%</b>
Promoting Niagara region/ wineries	3%	3%	5%	<b>4%</b>
General promotion of Ontario wines/ wine region	4%	4%	3%	<b>3%</b>
Canadian/Ontario wine is of high quality	1%	3%	1%	<b>1%</b>
Confusing - general ad criticism	3%	1%	1%	<b>1%</b>
Drink Ontario/ Canadian wine	1%	1%	2%	<b>1%</b>
Enjoy wine - general	1%	0%	3%	<b>1%</b>
Drink/buy local wine	1%	1%	1%	<b>1%</b>
Buy Ontario/ Canadian wine	1%	1%	0%	<b>0%</b>
Don't know / Refused	1%	1%	1%	<b>1%</b>
Other	1%	2%	1%	<b>1%</b>

## Campaign Ads: *impact*

Q

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

- The campaign ads are relatively consistent when it comes to encouraging target consumers to visit Ontario's wine country.
- "Billboard Ad 2"** is again ranked slightly high than the other two campaign ads.



	AD1	AD2	AD3	Average
A lot more likely	1%	3%	4%	3%
Somewhat more likely	26%	27%	24%	25%
Neither more nor less likely	71%	67%	69%	69%
Somewhat less likely	1%	2%	2%	1%
A lot less likely	0%	0%	1%	0%
Don't know	1%	1%	1%	1%
Total	100%	100%	100%	100%
More likely	27%	30%	28%	28%
Less likely	1%	2%	3%	2%
Net likelihood	26%	28%	25%	27%



# Summary

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# Key Learnings

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## Torontonians love their wine ▶▶

Roughly 9-in-10 Torontonians drink wine at least once every three months while 6-in-10 (62%) of target consumers drink wine at least once a week.

## Familiarity with Ontario's wine regions ▶▶

Majority of target consumers are familiar with Ontario's wine regions; male consumers are the most familiar.

Over 3-in-4 (77%) have travelled to Ontario's wine regions at some point in their lives; male consumers over 50 years of age are most likely to have been to an Ontario winery.

## To know Ontario wineries, is to love Ontario wineries ▶▶

Just under 3-in-4 (72%) are "likely" to visit Ontario's wine regions within the next year while 30% of target consumers say they're "very likely" to visit an Ontario winery in the next 12 months.

However, only **5%** of target consumers who have never visited an Ontario winery say they're "very likely" to visit an Ontario winery in the next 12 months vs. **37%** who have visited an Ontario winery in the past.

Again, male consumers over 50 years of age are most likely to say they are "very likely" (41%) to visit a winery in the next 12 months.



# Impact of Ad Campaign

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## Awareness ▶▶

1-in-5 (**18%**) target consumers recall seeing the *Ontario Wine Country* campaign over the past month.

Typically, outdoor campaigns yield anywhere from 5% to 15% awareness among the general public – depending on the topic and the creative.

## Impression and Recall ▶▶

Almost all respondents who saw the ads were left with a **favourable impression** and found the ad imagery appealing.

In terms of **message recall**, well over half of those who saw the ads remember the main message as “visit Ontario’s wine country” or “Ontario’s wine country is close and/or accessible”.

## Impact ▶▶

**The campaign has had an impact** at encouraging target consumers to visit a winery in Ontario’s wine regions in the future. Respondent who were exposed to the *Ontario Wine Country* ad campaign are almost twice as likely as those who didn’t see the ads to say that they are “very likely” to visit a winery in Ontario’s wine regions in the next 12 months.



## Concept Testing

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Overall, **Billboard Ad 2 – Visit our showroom** received the most positive feedback among the **campaign ads** used in the Summer 2010 media buy.

- Among the advertisements run during the Ontario Wine Country Campaign, “**Billboard Ad 2**” (**Visit our showroom**) leaves the most favourable impression among survey respondents.
- Although **Billboard Ads 1 and 2** have identical imagery, respondents exposed to **Ad 2** ranked its imagery with the highest net appeal.
- All three concepts are almost universally understood
- 8-in-10 people exposed to the campaign’s creative understand that the message is about *getting people to visit Ontario’s wine country OR informing them that the regions are close / easy to get to.*
- The campaign ads are relatively consistent when it comes to encouraging target consumers to visit Ontario’s wine country.







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