



SUSTAINABLE WINEGROWING BRITISH COLUMBIA

Inspired people growing outstanding wine

BENEFITS OF SUSTAINABILITY CERTIFICATION FOR WINERIES IN BRITISH COLUMBIA

JULY 2020



Letter from the Program Manager:

Thank you, for your interest in practices that promote a sustainable wine-growing industry, including the health and wellness for your people, the viability of your business and the integrity of natural systems.

In anticipation of launching the SWBC sustainability certification program, SWBC commissioned this report to identify the economic benefits of such practices. We are excited to now share the results!

The study of 12 wine-growing regions around the world concluded that BC can expect the following economic benefits from sustainability certification:

- Consumers are consistently willing to pay more for sustainable wine
- Certification creates market differentiation
- Sustainability labels positively impact consumer purchase decisions
- Consumer awareness and attitudes increase demand for sustainable certified wine, and
- Certification provides access to new markets

The report clearly shows that pursuing more sustainable practices is not only the right thing to do, but is increasingly expected by the consumer, ultimately rewarding sustainability certified businesses.

We look forward to helping you realize these benefits. The SWBC sustainability certification program will be the first, third-party verified sustainability certification program in British Columbia. Benchmarked against the best in the world, the Standards require practices that not only benefit the environment, but also support social wellbeing and enhance the bottom line.

To learn more about the SWBC Certification program please visit sustainablewinegrowingbc.ca and connect with me with questions or to discuss further.

Sincerely,

Katie Pease, Program Manager
Sustainable Wine Growing BC

BACKGROUND

Sustainable Winegrowing BC (SWBC) is a program of the BC Wine Grape Council (BCWGC) that is preparing to launch a sustainability certification program for vineyards and wineries in the fall of 2020. The program is based on the current self-assessments for wineries and grape growers that was developed over an 18-month period in consultation with industry stakeholders. In July of 2019, the certification program was presented to wineries and grape growers at the 2019 Enology & Viticulture Conference. Based on feedback, it was determined that SWBC should develop a resource demonstrating the benefits of certification that can be distributed to members and posted on the SWBC website.

Consumers have shown a preference for wine that is produced using sustainable practices and are labelled as such (Forbes et al., 2009), however, this conceptual support is often lost in the confusion over what sustainability means, the availability of these products, and awareness of them in the marketplace (Wine Intelligence, 2019). This report connects sustainability factors with how they impact consumers (Nielsen, 2018b), and explore the most effective strategies for communicating the resulting benefits to wineries in British Columbia. While the SWBC certification program rests on environment, profitability, and social values; this report specifically focuses on the economic benefits of joining the program. SWBC has future plans for additional research on the ecological and social benefits.

SWBC commissioned Terroir Consulting to investigate how other sustainability certification bodies have demonstrated the value of becoming certified and develop material that could communicate these benefits so that there may be increased demand for sustainability certification.

APPROACH

In 2018, Moscovici & Reed (2018) identified 12 wine certification schemes that clearly identify a goal of sustainability, with either a certification title or certifying body. These Global Wine Certification bodies were all contacted, and include New Zealand, Oregon, California (Lodi), France, California (SIP), California (CCSW), South Africa, Australia, Chile, Long Island, Italy and Austria. They were all asked what benefits of sustainability certification wineries in their region have experienced as well as why wineries could justify the time and resources to their program over other certification options.

Eight of the 12 regions responded with detailed responses and shared resources they use to communicate the benefits of certification. The websites of all 12 certification bodies were surveyed for additional resources on this topic.

The resources the certification bodies provided and posted on their websites were coded and analyzed using a qualitative data analysis software called NVivo. This resulted in five overlapping thematic results along with specific recommendations. This includes Certification Provides Access to New Markets, Consumer Awareness and Attitudes Increase Demand for Sustainable Certified Wine, Sustainability Labels Positively Impact Consumer Purchase Decisions, Consumers Are Consistently Willing to Pay for Sustainable Wine, and Certification Creates Market Differentiation.

FINDINGS & RECOMMENDATIONS

This section includes a summary of the five key areas of messaging that global wine certification bodies have found effective for communicating to wineries the benefits of becoming certified. Additionally, specific recommendations for how wineries can apply these findings has been included.



CONSUMERS ARE CONSISTENTLY WILLING TO PAY MORE FOR SUSTAINABLE WINE

When considering the benefits of certification, producers understandably will weigh the costs and resources of obtaining sustainability with the ability to recoup costs and make a profit on the final product. Because of this, a significant amount of research has been devoted to measuring consumers' preferences and willingness to pay for wine with characteristics of sustainable production (Schäufele & Hamm, 2017). Over the past decade, research has consistently shown that consumers will pay a premium when they understand the wine was made with sustainable practices, with 66% of consumers (73% of millennials) worldwide reporting they would be willing to pay extra for sustainable offerings (Nielson 2015).

In New Zealand, 82% of wine producers believe that switching to environmentally sustainable practices results in an increased price for wine (Forbes et al., 2009). In the American Pacific Northwest, sustainably grown grapes consistently achieve a premium price (Full Glass Research, 2016) and Spanish consumers have demonstrated they are willing to pay more for the end product (Rubio, 2016). In the American state of Michigan, about $\frac{3}{4}$ of wine drinkers will pay 10-15% more and those with firm environmental stances will pay \$4-\$7 more (5 Lakes Energy, 2015). This is important because it

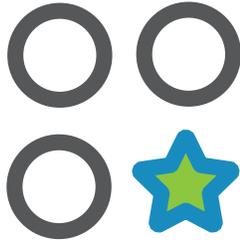
demonstrates that certification can lead to increased prices to help recoup the cost of certification, and if the wine is targeted at specific segments of the population, a premium price and profit can be achieved.

In 2020, the California Sustainable Winegrowing Alliance (CSWA) commissioned a research project and found that 74% of American wine consumers are willing to spend more on sustainable wine with an average extra value of \$3 (CSWA, 2020). Additionally, 9 in 10 Millennials are willing to spend more, indicating that as this group increases their disposable income, sustainability certification will grow in profitability. An important limitation of this research is that only 25% of American wine consumers are currently aware of sustainable wine and only 7% have purchased certified sustainable wine in the past 6 months (CSWA, 2020). The lack of sustainable wine available for purchase and low awareness levels means that there is an attitude-behaviour gap in the research (Schäufele & Hamm, 2017). While the majority of wine drinkers indicate they will consider sustainably produced wine and are willing to pay more for it, more in-market research of actual sales dollars is required.

RECOMMENDATIONS

There is strong evidence to support the idea that consumers are willing to pay more for certified wine. While access to certified sustainable wine is growing for most wine consumers, the need for in-market research and analysis of sales data is required. The Australian Wine Research Institute (www.awri.com.au) produces case study examples of success stories with sustainable practices. An effective strategy for British Columbia wineries would be to create case studies demonstrating the economic benefits of sustainability certification, including consumer willingness to pay.

Consumers consistently spend more on sustainable wines when they have awareness for what the certification requires. Continuing to educate consumers on all three pillars of sustainability is vital to realizing the economic benefits. Additionally, if marketing efforts are targeted at consumers with firm environmental stances, a further premium can be achieved.



CERTIFICATION CREATES MARKET DIFFERENTIATION

Wine producers have numerous options for programs and initiatives to participate in to improve their business and build appeal with consumers. However, marketing wine with sustainability characteristics has shown to be an effective strategy for quality differentiation (Schäufele & Hamm, 2017). When starting a certification program there are often concerns of feasibility and cost. One of the keys to effectiveness is for a region to flip this upside down and get a high enough volume of growers and producers to participate so that it becomes infeasible not to participate. In New Zealand, the wine industry has worked together to ensure that wine from their region is synonymous with sustainability and certification is essential for business success:

“For the New Zealand wine industry, the Sustainable Wine New Zealand (SWNZ) logo use policy has resulted in huge growth to our membership. Because the major wine companies use the SWNZ logo, which requires the purchase of SWNZ-accredited grapes, it is very difficult for contract growers to sell grapes without being SWNZ-certified. Additionally, the events sustainability policy requires certification to enter New Zealand Wine events and competitions, which has resulted in large growth of our membership.

*- Edwin Massey, General Manager
Sustainability, New Zealand Winegrowers*

In the American Pacific Northwest, there are numerous different types of certification programs, however, but the sustainability-focused LIVE program

carries the most weight for industry professionals (Full Glass Research, 2016).

Speaking more to the importance of certification and how it can lead to market differentiation, Dr. Mardi Longbottom, Senior Viticulturist at the Australian Wine Research Institute, indicates that the most common benefits heard from certified members of Sustainable Winegrowing Australia relate to market differentiation:

- Identifying efficiencies and cost savings
- The program promotes innovative thinking to overcome problems
- The program provides a tool to review and plan for the year
- Standing out from the crowd
- Members like being part of a recognised program supported by the whole of industry
- Certification is a formal acknowledgement of their commitment to sustainability and it helps drive change within the business

It is becoming increasingly important for wine regions to become pro-active as governments are becoming more aware of the impacts of sustainable agriculture practices and are exploring options for making them mandatory (Nielson, 2018b). As a result of aggressive campaigns, Wines of South Africa now has 94% of their vineyards certified. Austria Sustainability is seeing political requirements for environmentally friendly production driving producers to certify as well.

RECOMMENDATIONS

Sustainable practices can lead to many benefits for wine producers, including market differentiation. Importantly, as participation grows and a wine region builds associations with specific practices, it becomes less feasible not to participate as is seen in places like New Zealand. Additionally, as consumers become more aware and interested in sustainable products, there is potential for political intervention, making it beneficial to be pro-active. Following the example of New Zealand, it is important to demonstrate the benefits to larger producers and this will help dictate the market for growers, retailers, and smaller players.



SUSTAINABILITY LABELS POSITIVELY IMPACT CONSUMER PURCHASE DECISIONS

Consumers have many choices when purchasing wine and the label can play an important role in determining which product they end up selecting. Wine drinkers often rely on the label to make assumptions about the wine inside the bottle (Gluckman, 1990), and will attach symbolic value to specific qualities during the purchase process and consumption based on their own personal experiences (Hall, 2016). The visual cues on a label have a powerful impact on not only the purchase decision, but also the sensory experience of the wine (Esau, 2019), as consumers are using their experiences to look for symbols that represent their values (Warde, 1994). Specifically, wine drinkers that value sustainability are looking for easy ways to find and identify sustainable wine such as clear and simple visual cues (CSWA, 2020). Since consumers cannot accurately evaluate sustainability attributes through consumption, they rely on visual cues to generate expectations of the perceived sensory experience (Schäufele & Hamm, 2017), and also to establish trust that the product aligns with their values and can be trusted (Tait et al., 2018).

For a sustainability certification program to be successful, the certification body needs to establish a symbol or logo that can be put on the wine and is easily identifiable. Consumers seek easy-to-navigate indicators to find and identify sustainable wines such as clear and simple visual cues (Wine Intelligence, 2019). Information on the wine label is the most used source for information on sustainability, even if it is not the most effective (Wine Intelligence, 2019) and about 2/3 of wine drinkers are interested in buying a bottle with a sustainable label, especially if they understand the environmental, economic and social aspects (Tait et al., 2018). In the American

Pacific Northwest, 84% of distributors and 70% of wine producers agreed that featuring sustainable production on the label or package of a wine improved the sales or marketability of the wine. (Full Glass Research, 2016)

Importantly, the label needs to be able to communicate that the wine is not only sustainable but has been certified by a third-party to have a positive impact on the appeal of wine (Wine Intelligence, 2019). A certification logo on a wine label has proven to be an effective marketing tool (Full Glass Research, 2016), second only to an award-winning endorsement in places like California (Wine Intelligence, 2019). However, in California, they have found that when a consumer is made fully aware of what is involved in sustainability certification and endorsed with a California Sustainable Winegrowing Alliance (CSWA) logo, this results in the highest likelihood to buy among U.S. wine consumers. (Wine Institute, 2019). While 9 in 10 wine consumers in places like New Zealand wish to see some form of labelling to inform them about wines that have been produced using environmentally sustainable practices (Forbes et al., 2009), sustainability certifications for wine are more important to younger generations, particularly if they come with reasoning, justification and appealing logo designs (Wine Intelligence, 2019). A wine label is the most frequent source of information on sustainability (CSWA, 2020), and a certification logo placed on a front label is the most effective at reaching the most consumers, although younger consumers tend to look for additional information on the back (Wine Intelligence, 2019).

RECOMMENDATIONS

For a winery to achieve the economic benefits of a certified sustainable program, a logo needs to be developed and placed on the front of certified wines. Additional research may be required to determine what type of logo would achieve the following goals in British Columbia:

- The logo needs to clearly communicate certification.
- The logo needs to be visually appealing to consumers that value sustainability.
- The logo should focus on all three pillars of sustainability.
- Additional information about sustainability can be included on the back label.
- Over time, the visual cues of the logo need to become associated with sustainability in the minds of consumers so that they can form expectations about the wine and the values it represents.



CONSUMER AWARENESS AND ATTITUDES INCREASE DEMAND FOR SUSTAINABLE CERTIFIED WINE

One of the biggest challenges for the successful implementation of sustainability certification is to raise awareness of the term, “sustainability”, while simultaneously explaining to growers, producers, and consumers what the term actually means. Conceptually, the term is valued by wine drinkers, however, the complexity of sustainability messaging generates confusion in the marketplace (Wine Intelligence, 2019). Specifically, consumers find the term “sustainability” confusing and will generally associate it with a singular environmental issue like organic (Barrows, 2019), or another specific farming practices (Wine Intelligence, 2019). Even within research that examines the impact of sustainability on the wine industry, most studies focus on the environmental aspects of sustainability while neglecting the social and economic aspects of sustainability (Schäufele & Hamm, 2017).

Understandably, wine producers’ have shown caution for sustainability certification due to the low awareness of the broad concept of sustainability (Schäufele & Hamm, 2017) and the cost of becoming certified (Waldrop et al., 2017). For many wineries, there is still a significant cost in money, time and expertise to achieve certification (Talen et al., 2013; Teng, Zhang, Wu, & Zhang, 2016). It is important for the wine industry to recognize that these barriers to selling sustainability are deteriorating as consumers and their expectations continue to evolve towards the concept (Nielsen, 2018b). Consumers are changing their purchase habits and becoming more conscientious about where and how products are made, resulting in sustainable consumer goods on track to make up 25% of store sales by the year 2021 (Nielsen, 2018a). In the United States, awareness of sustainably produced wine is up to 30% in 2020

(25% in 2019), and 7% of regular wine drinkers have conscientiously purchased sustainably produced wine in the past 6 months, including 18% of generation Z (CSWA, 2020).

While awareness and purchase intention of sustainable wine is growing, Millennials and Gen Z have a strong affinity towards sustainable wine certifications (CSWA, 2020). Three quarters of Millennial consumers are willing to change their purchase behaviour and are willing to pay more money for a product with sustainable ingredients (Nielsen, 2018a). For Millennials and Gen Z, it is not enough to claim a product is sustainably produced as they have a very strong perception of sustainability certification programs and certification logos (CSWA, 2020; Wine Institute, 2019). One of the main reasons younger generations have a growing affinity for sustainably certified products, including wine, is that they are more digitally engaged with information about products while they are shopping (Nielsen, 2018a). This allows them to search for information about a product before purchasing to ensure it aligns with their values.

Within a marketplace that has confusion and even skepticism, third-party certification of sustainably produced wine provides consumers with transparency and reassurance (Wine Intelligence, 2019). When wine consumers are informed about sustainably produced wine, 71% of U.S. wine drinkers (surveyed in January 2020) would consider buying sustainably produced wine in the future (CSWA, 2020). In Canada, 70% of wine consumers would consider buying sustainably produced wine and 65% of wine consumers believe sustainably produced wine is “right for me” (Wine Institute, 2019).

A barrier to sustainable wine has been confusion over the term, low awareness, and low availability. This barrier is quickly deteriorating as awareness and access are improving. The demand is growing across all demographics, however, as Millennials and Gen Z have more disposable income, wineries need to be prepared for the demand of not only sustainable practices but being able to back up claims with certification as well.

RECOMMENDATIONS

Positive consumer attitudes and awareness of sustainably produced wine are continuing to grow every year. While wine producers are right to be cautious with the time and expense of sustainability, the marketplace is moving towards sustainable wines, especially among younger generations. To capture the growing demand for sustainable wine, there are two key areas to focus on in campaigns to raise awareness:

1. It is not enough to be sustainable; wine producers require third-party certification to satisfy consumers' growing desire for transparency and clarity as they become more conscientious of where products come from and how they are made.
2. The concept of sustainability becomes much more appealing to consumers when they understand that it is not only environmental issues. Campaigns that also focus on the social and economic aspects of sustainability are most likely to result in influencing purchase behaviour (Schäufele & Hamm, 2017).



CERTIFICATION PROVIDES ACCESS TO NEW MARKETS

“High value export markets are preferentially seeking independently certified sustainable wines as a part of tender processes, for listings in import and distribution portfolios, and increasingly on shelf space in stores.”

- Jennifer Lynch, General Manager, McLaren Vale Grape Wine & Tourism Association

“Evaluations are based on the following criteria, as well as the overall judgment of the buying teams regarding the commercial prospects of the product: Environmentally friendly packaging/sustainable agriculture/production practices”

- Liquor Control Board of Ontario (2012, p.15).

In 2017, Wines of BC produced the BCWI Wine Export Strategy for BC wineries. The strategy indicated that BC wineries have an opportunity to effectively leverage the province’s reputation as a premium, high-quality, wine growing region to enter new and existing international markets. Further, because Canada has recently entered into a number of new international free trade agreements, there is an opportunity for Canadian wineries to take advantage of expanding market opportunities (Wine of British Columbia, 2017).

If BC wineries are interested in exporting or expanding their export markets, the ability to demonstrate sustainable practices is an asset. Sustainability certification is growing in importance to access specific markets, including some of the world’s largest wine buyers. Many large wine buyers and import markets are including sustainability as an evaluation criteria when deciding which wines to purchase. The preference for certification is driven not only by changing consumer attitudes and behaviours, but also by internal corporate values. This corporate mandate is exemplified by the Liquor Control Board of Ontario’s (LCBO) section of the website outlining their own pillars for sustainability as well as the procurement guidelines which state:

Wine importer, Marks and Spencer (M&S) requires that wine “... comes from a vineyard/winery that is a member of an M&S Approved Sustainable Wine Scheme in the relevant country” (Marks and Spencer, N.D.). Online retailers like Total Wine & More have added the ability for consumers to search by “Sustainable Wine Producers” (Total Wine & More, N.D.). Wineries in regions that have certification bodies are recognizing the importance of demonstrating their sustainable practices in order to align with these corporate values. Austria has only had a certification program in place for 5 years, but the wineries in this region recognized the value from the very beginning:

“Sustainability plays an important role and large wineries have recognized from the outset of our program in 2015 that certification is important for the international and domestic market.”

-Franz G. Rosner, Sustainable Austria

LIVE, a nonprofit organization which provides independent certification in the American Pacific Northwest, commissioned research to determine how wineries in their region believe access to markets is impacted by certification (Full Glass Research, 2016). The results showed that more than half of wineries believe certification improves access to new markets:

- 52% of wineries believe “some important retailers prefer or favor certified sustainable or organic wines”.
- 54% of wineries agree “Certification increases confidence in the product for the trade”.
- 63% of wineries wholesalers and 55% of retailers said that sustainable wines had a better reputation than conventional wines among the trade.

The corporate values of importers and wine buyers is putting a premium on sustainability certification. Wineries in Austria, New Zealand, and the American Pacific Northwest have recognized that one of the key benefits of certification is that it improves access to key export markets.

RECOMMENDATIONS

As British Columbia continues to develop an export strategy for wine, wineries should emphasize sustainability certification as an important component to their export plans. Some of the largest markets and buyers are including proof of sustainable practices as part of their evaluation criteria and certification would enhance BC wineries’ ability to access more domestic and international markets.

SUMMARY

As Sustainable Winegrowing BC (SWBC) prepares to formally launch its sustainability certification program, it is important for wineries to be aware of the benefits of certification for the program to succeed. This project reviewed 12 established global wine sustainability certification bodies to understand how they communicate the benefits of their programs. These other regions have spent years exploring, measuring, and researching the benefits so that they could communicate and act upon these benefits. Wineries are able to benefit from this experience and put these best practices in place. As BC wineries continue to explore new markets for their products, it is essential that certification be forefront in this planning as many of the largest markets and buyers are including proof of sustainable practices as part of their import evaluation criteria. A limitation of sustainability has been the lack of awareness and availability of sustainable products; however, consumer demand is increasing, especially in younger age groups. Sustainability certified wine enables wineries to meet this growing consumer demand. Consumers are often looking for symbols on the label that they associate with their own personal values. It is important to develop an effective logo for wineries to put on their wine labels in order to communicate

these values to customers. When wine drinkers are made aware of what is involved with sustainability certifications, they are consistently willing to spend more money on that product. Consumer education on SWBC certification is important so that wineries can realize the financial benefits of their efforts. As consumers, buyers, and governments are becoming more sensitive to the benefits of sustainably produced products, it is best for wineries to be proactive. Wine regions that work together to make sustainability a pillar of their region are seeing the benefits because it creates a differentiator in the global marketplace.

Established global wine certifications have demonstrated that there are real tangible benefits to being sustainable. These best practices and recommendations can be incorporated into BC wineries' strategy to increase demand for certification and build a more sustainable wine industry.

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