A Reflective Process to Explore Identity in an Emerging Wine Territory:

The Example of British Columbia

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Abstract

- *Purpose:* Identity is often used in wine territory narratives but its meaning is rarely explored with industry actors. This paper presents the development and application of a four-step iterative process for engaging an industry in a complex and deep reflection about its shared identity: understanding identity; identifying commonalities and differences; developing a shared narrative; sharing best practice.

- *Design/methodology/approach:* We have engaged with over 50 wineries between 2016 and 2018 on the identity of the British Columbia wine territory through workshops, interviews, and other conversations. Complementary methods include documentary review and observations.

- *Findings:* Our work shows the applicability of the four-step process. Success depends on building relationships with and across the industry; creating independent, safe learning environments, and facilitation by an independent party; allowing for feedback between the steps, continuous reflection, and reiteration of steps; making the time for complexity.

- *Originality/value:* The paper presents a unique process for an industry to explore the identity of a wine territory. It focuses on British Columbia, about which little has been written. Through the process, industry can better understand identity, what it is, why it matters, and how it impacts businesses. The paper's insights can inspire researchers and industries in their thinking and practice about identity.

Keywords

Identity, territory, cohesion, collaboration, engagement, competitiveness, British Columbia, Canada

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1. Introduction

An exploration of its own identity is a fundamental step for any wine territory to differentiate itself. It supports strategic decisions regarding business orientation, market penetration, and choice of modus operandi, and limits the effect of dispersed actions in the wine sphere, which is often considered a "multipolar world" (Traversac, 2011, p.160).

The identity of a wine territory is influenced by a set of interacting attributes that, in our experience, are sometimes complex for an industry to grasp. It encompasses shared values, strengths, weaknesses, and specific social, natural, cultural and historical factors. Developing an agreed identity is a long and demanding process, albeit one that supports collective quality enhancement, a critical aspect of identity in relatively young wine regions (Christensen et al., 2015), and provides a basis for communication strategies that strengthen territorial reputation.

For older territories, the road from the past has allowed practices, self-awareness and narratives to emerge, enabling them to position their wines in the context of market expectations, and perhaps to shape those expectations. Their capacity to present in a cohesive voice the roots and determinants of a wine territory, and what makes its wines specific (Gergaud, *et al*., 2012), is usually considered a decisive competitive advantage on the global market.

For an emerging territory, shared attributes may be hard to define. Agreeing on them can be a challenge, because there is no "connection to long-established wine culture and heritage" (Fountain and Dawson, 2014, p.43), and development is supported by individual initiatives that are fed by personal beliefs. The challenge may be harder when there is significant geographical distance between diverse regions across the territory, and little awareness of the need to articulate a shared identity. The lack of proximity may impede the development of strong relations and collective efforts. To overcome such challenges, reflective work about identity, and how an industry wants to present itself to the world, is strongly desirable, if not necessary.

The critical question is *how to engage the territory* in the requisite deep reflection, especially when the meaning of identity is often misunderstood. This paper provides an answer. We

propose a four-step process: understanding identity; identifying commonalities and differences; developing a shared narrative; sharing best practice. We developed and applied our process in British Columbia (BC), a province in western Canada.

We discuss identity at a territorial level for both contextual and conceptual reasons. During our interactions in BC, we consistently heard industry arguments about the need to present a "single voice" to policy-makers, and other stakeholders. We also heard policy-makers from the Canadian government emphasise strengthening BC's global identity, to enhance the wine industry's export readiness. These practical concerns led us to develop a process with province-wide reach [1].

We consider BC a territory conceptually, in the following sense: "A territory is a physical space, bounded by elements of natural, cultural and/or ideological nature. It has an identity of its own, somehow a collective one, built on nature, culture, history, social and human capital (knowledge, skills ...). It is a place where relationships between dissimilar players lead to the development of collective dynamics and the achievement of a common purpose" (Pecqueur, 2000, p.15, as cited in Ditter and Brouard, 2014, p.9). Identifying and valuing differences and commonalities across the various wine-producing regions of BC is thus a critical part of our process, consistent with Capello's (2018, p152) argument that "concepts of similarity and solidarity" are fundamental to defining territorial identity. A process of awareness, where conflicts as well as private and public interests are explored to find points of convergence, is crucial for developing a strong identity. Deliberate efforts have to be made to leverage resources and capabilities, and develop collective actions that benefit individual businesses, and the territory as a whole.

2.   The concept of identity, and why it matters

The essence of "identity" is found in the answers to 3 critical questions (Staber and Sautter, 2011). Who are we? What do we aspire to do and become? How do others perceive us? Honest answers reflect what we value doing and being. They are lived, felt and seen, both internally within each

person and externally, in relations amongst people. They refer to commonalities and differences, amongst people, both within and across territories. Throughout a wine territory, each behaviour, choice, and action – for both individuals and groups – plays a part in forming and evolving a coherent and strong identity (Buschert *et al.*, 2018) [2].

Answers to the 3 questions are associated with the concepts of terroir (Beebe *et al.*, 2012) and territorial cohesion, and emerge through continuous engagement. "A terroir is a delimited geographical area where a human community develops collective knowledge over time regarding production, based on a system of interaction between a physical and natural environment and a set of human factors" (Vincent *et al.*, 2008, as cited in CARTV, n.d.). Terroir is multi-faceted, and its products "are synonyms for cultural diversity, reflections of the evolution of a society, of its attachment to certain habits of consumption, and not the guardians of a culture that is fixed and turned in on itself. Locality participates in the construction of identity, it doesn't suffocate it" (Bérard and Marchenay, as cited in Barham, 2003, p.132). For Barham (2003), terroir is about "undergoing a process of cultural re-evaluation whose outcome is still uncertain, but which potentially points towards a future that includes a valued past without becoming either rigid or exclusionary" (p.132).

Territorial cohesion refers to the sense of being a geographical area in which local actors "share a set of practices, strategies, and institutions contributing to a local identity", and where they share rules and quality standards, and "beliefs and representations" (Ditter and Brouard, 2014, p.10; see also Romanelli and Khessina, 2005, on the identities and development of regions, industrial clusters, and shared understandings). Exploring identity requires that industry actors engage with each other continuously and long-term, to build confidence, trust, and social capital, and to identify shared values, understanding and interests that form the basis of their shared identity.

Answers to the 3 questions about identity are also associated with perceptions. Social interactions, and performance in front of others, matter in shaping identity, not least to manage impressions (Goffman, 1959; Zamparini and Lurati, 2012). In accordance with Goffman (1959,

pp.112, 238), it is pertinent for industry actors to have spaces - a "backstage" - where they can discuss key issues collaboratively in an environment of trust and loyalty, to communicate with their audiences at the front stage (also Benford and Hare, 2015). A backstage is a safe learning environment, where contradictions and sensitivities can be revealed, and a collective understanding found about managing perceptions, and about what to disclose in projecting an identity.

Progressively reaching a collective understanding requires introspection, a long journey where the path is as important as the destination. Identity is neither chosen nor invented, and is not about an appealing slogan or picture. It is found through collaboration amongst as many actors as possible. Key aspects of the territory must be identified, challenged, and stressed, and a narrative created.

Perspectives on exploring the identity of a wine territory are summarised in Figure 1, which we used in 2018 in a poster to introduce actors in the BC wine industry to the concept of identity, and challenge their initial thinking. The content and design of the poster are a consequence of both our engagement with the literature and our interactions with the industry since 2012 – they reflect our assessment of key points that required industry attention.

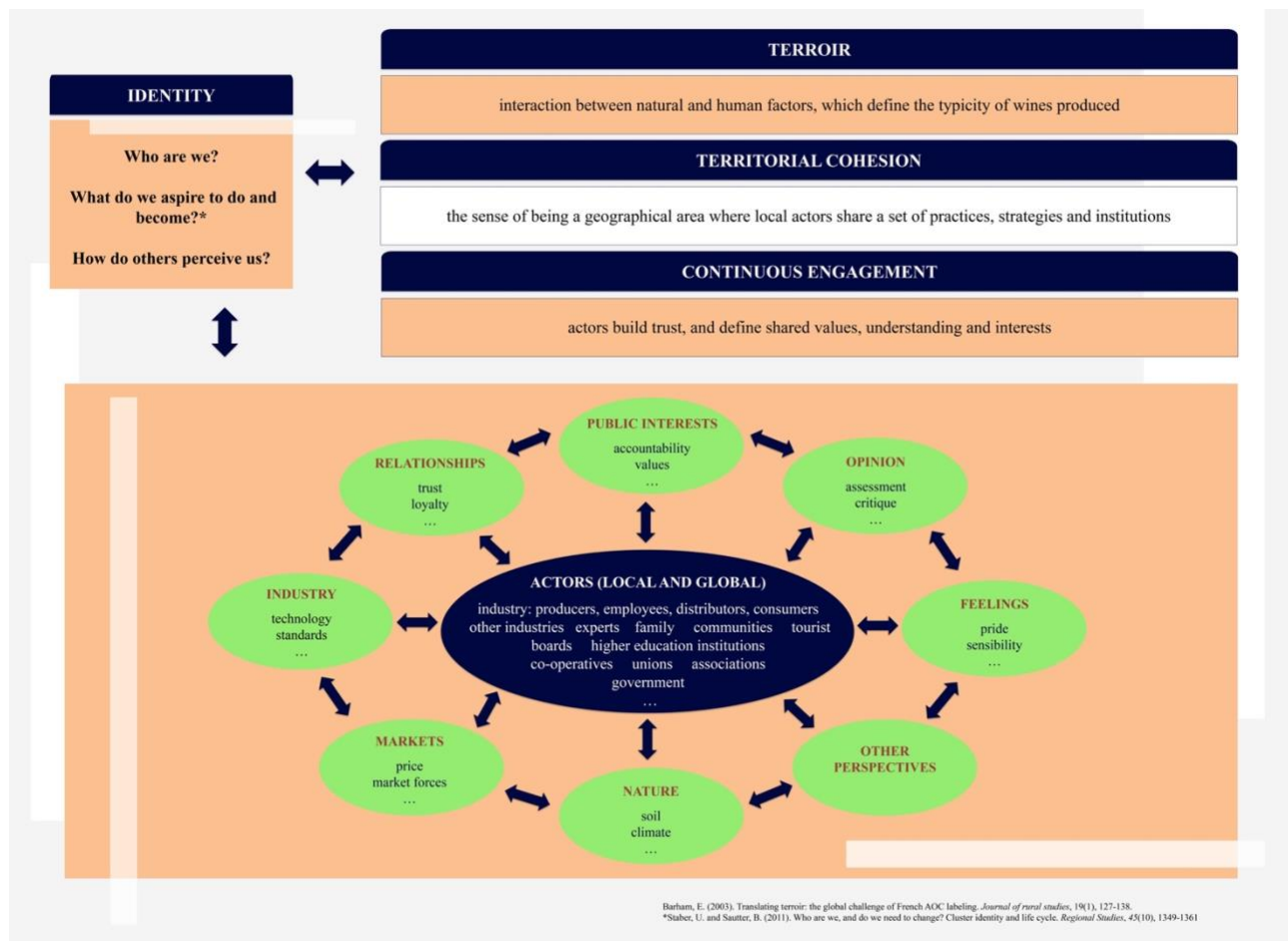**Figure 1: Exploring the identity of a wine territory**

Figure 1 shows that the interplay across terroir, territorial cohesion, continuous engagement, and the 3 critical questions at the heart of identity, need to be addressed from multiple perspectives if the identity is to be coherent and shared across the territory. Many actors are at play, each with their perceptions and understanding, both within the industry and more broadly (e.g. in related industries and in communities), and both within the territory and further afield (e.g. in other wine territories). There are multiple dimensions to consider - nature (e.g. soil and climate), markets (e.g. prices, market forces), opinion (e.g. assessment and critique), and feelings (e.g. pride, sensibility).

A shared identity matters because it helps to connect a territory's regions, wineries, and growers. It helps people to determine where they compete with each other and where they cooperate (Crick, 2018). It empowers the industry to communicate an authentic, confident narrative. That

leads to recognisability, helping to project the territory's "character", the "where it is" and "what it seeks to become" (Taplin, 2015; Beebe *et al*., 2012). A shared identity provides sound foundations for marketing (Harvey *et al*., 2014), publicity and government support (e.g. for communicating with policymakers, so they understand what the territory does, and could, offer), and attracting tourists (Fountain and Dawson, 2014). It fosters appreciation and recognition by external audiences, feeding the bottom line for each enterprise.

A shared identity also provides the foundations for a wine territory to build a coherent development strategy, based on strong determinants that are accepted by the wine community (Capello, 2018). This is likely to yield enhanced capability to compete on the market and, ultimately, increased sales. The success of a territory relies not only on the classic price-quantity equation but also quality and its perception. A reputation for quality depends on complex factors, both cultural and social, and is strongly impacted by a territory's branding strategy (Rocchi and Gabbai, 2013). An identity based on sharing and commonality across "users", and relayed by them (Alaux, *et al*. 2015), allows for quality differentiation. Ultimately, it influences consumers' willingness to pay.

3. Research context and approach

3.1 The BC wine territory

The first BC wine was produced in the mid-nineteenth century, but not until the 1920s did winemaking develop commercially, following removal of legal prohibitions (Hickton, 2005). The industry changed markedly after the 1989 North American Free Trade Agreement (Ross, 1995; Migone and Howlett 2010; Cartier 2014), using government aid to introduce vinifera varieties (Ross, 1995; Belliveau *et al*., 2006).

In the early 2000s there was rapid growth, the number of BC wineries increasing from 65 to 200 in 10 years (Cartier, 2014). Now, there are approximately 300 [3], including 3 relatively large and a few medium-sized, but mostly very small wineries. The overwhelming majority are in the

Okanagan, where irrigation-based fruit farming has been pursued since the region was settled over 100 years ago (Seager, 1996; Barman, 2007; Wagner, 2008; Sugden and Sugden, 2019). There are wineries in the Similkameen Valley, neighbouring the Okanagan, and in the Fraser Valley, nearly 400 kilometres to the west of the Okanagan, and proximate to the province's major metropolitan area, Vancouver. Still further west, a significant number of wineries are located on Vancouver Island and the Gulf Islands [4].

In 2010, the 3 large producers accounted for over 80% of output, primarily through blends using grape juice imported into BC, partly through estate wines. 19 wineries accounted for over 90% of total sales (Cartier, 2014). The overall economic impact in 2015 has been estimated at over $2.5 billion, with direct and indirect employment exceeding 10,000 (Frank, Rimerman and Company LLP, 2017).

Despite recent growth, BC is not a globally recognized wine territory (Migone and Howlett, 2010). Territorial cohesion has been missing, and social capital low, linked, in the case of the Okanagan, to high industry fragmentation and weak institutions (Hira and Bwenge, 2011). Mistrust has resulted in "little sharing of knowledge and innovation between small and medium wineries, and independent grape growers" (Cartier, 2014). Such factors make it hard to identify and evolve the wine territory's identity, albeit in the last few years we have observed signs of change. Growing competition within the Canadian wine market, the willingness of some actors to seek international recognition for BC wine, and the ambition to export and expand markets, have highlighted for some industry actors the need for a collective approach.

Similarly to Ferrari's (2014) argument for Ontario, BC may be seen to have a plan to achieve recognition as a wine territory through its use of geographical indicators [5] and its Vintners Quality Alliance (VQA), which focuses on quality and grape origin (Rabkin and Beatty, 2007; Pankowska, 2019). However, any such plan must be understood in the context of a relatively loose system that leaves room for innovation (Gade, 2004) - a system suiting a culture that self-

proclaims its flexibility and freedom, as often expressed by the industry in our interactions, and that is sometimes trumpeted as the "Wild West".

There is much work to be done in BC to conceive narratives of typicity - the degree to which a wine reflects its place of origin (combined with the type of vine) and demonstrates the signature characteristics of the territory (Barham, 2003) - beyond simply natural factors, embracing a rich conception of terroir. People, in the context of a particular geology and climate, shape a territory's vineyards and wines, influenced by - and in turn influencing - tastes and culture.

3.2   Our research approach

As a university concerned with the development of its host territory, the University of British Columbia (UBC) aims to have positive influence on socio-economic activities in its surroundings, including those of the wine industry (Sugden, 2020). The role that universities play in territorial development, and the need for academics to engage with other societal actors is widely discussed in the literature (Allison and Eversole, 2008; Pinheiro *et al*., 2016; Karlsen *et al*., 2017).

Regarding the form of this active engagement, how it takes place and what it entails, we situate our work at the intersection of action research and territorial development, where researchers take a more active role, and participate in territorial development as part of a non-linear approach to research (Karlsen and Larrea, 2014; Costamagna and Larrea, 2018; Larrea, 2019). Evolving collective knowing in the territory - "a capability, a learned pattern of collective action, where the actors systematically modify their actions over time through a dialogue and learning process" (Arrona and Larrea 2018, p.139) - is central to such an approach. Regular, meaningful interactions between researchers and territorial actors are required to foster collective knowing.

In late 2012, we began to develop relationships with leaders of the BC wine industry. Since then, we have engaged with approximately 120 wineries, over a third of the BC total, on a variety of issues, including labelling, R&D investment strategies, and wine tourism. Of those, we have engaged with over 50 wineries primarily on identity. We visited wineries, to listen and discuss,

understand the territory and assimilate the challenges. During these meetings, we made in-situ observations, e.g. about vineyard and winery operations, winery buildings and artefacts, and other property developments. Over the years, we met with winery owners, CEOs, winemakers, grape growers, and representatives of industry organizations. We observed interactions at wine festivals, tastings, and industry conferences, and noted key issues. These engagements were complemented by ongoing documentary review on identity applied to the wine industry – academic literature, industry reports, research notes, websites, archives - especially since 2014, to be able to share ideas with industry actors in ways that could account for their current thinking and behaviour, and to guide enhanced collaboration.

Consistent with UBC's commitment to support territorial development, we began to "create the conditions that enable others to reflect, decide and act" (Larrea, 2019, p.5). Safe spaces – backstage spaces (Goffman, 1959) - were needed for us and the industry to learn about what each could provide and require in a collaborative relationship, and for people "to gain knowledge and understanding through open-ended inquiry" (Mooken *et al*., 2018, p.129). Since 2014, the centre-piece of our work has been an annual Wine Leaders Forum, a retreat-style educational space for winery owners to identify and address their strategic concerns. The Forums encourage collaboration and reflection. They enable participants to share a common interest in the consequences of actions, thus to see themselves as a public (Dewey, 1927; Mooken *et al*., 2018). Forum participants are typically winery owners or principals. Some have attended several years, allowing for continuity in the process, others once. All bring experiences and knowledge. Whilst Forums address different topics each year, participants have always been asked guided questions to stimulate collective knowing about territorial identity, particularly in BC. Questioning raised awareness of the importance of identity, and the need for reflection.

In early 2017 we conducted semi-structured interviews with 6 industry leaders, chosen on the basis of their experiences and roles in the development of the BC wine territory through their businesses and industry-wide initiatives. The choice was informed by our formal and informal

conversations (Swain and Spire, 2020) in the territory since 2012. Some interviewees are well-known for helping to shape the BC industry in the late 1980s and 1990s, e.g. by establishing estate wineries, creating industry organizations, and developing quality standards. Others were selected because of their recent activity, e.g. influencing labelling policy, and exporting. Questions focused on the interviewee's experience, and their perspectives on territorial development, including opportunities and challenges, industry collaboration on strategic concerns, and prospects for the future. The information enhanced our understanding, and supported findings from our documentary review.

Based on interactions with the industry, we developed and applied a four-step process for industry actors to explore BC's identity as a wine territory. We introduced workshops as a further set of safe spaces as part of that process. To enhance accessibility and ensure diverse perspectives, we held them in regions across the territory. They were organised in 2 iterations:

(1) November 2017 to March 2018 workshops, organised in partnership with the Glasgow School of Art, Scotland (GSA)

We delivered 6 half-day workshops over a week in November 2017, having partnered with GSA to introduce creative ways to engage communities. The workshops were held in Kelowna, Osoyoos and Penticton (all in the Okanagan), Keremeos (Similkameen Valley), Langley (Fraser Valley) and Duncan (Vancouver Island). 45 people from 38 wineries and other organizations participated: 24 owners/proprietors, 6 GMs/Presidents/Managers, 5 Marketing/Communications staff, 4 winemakers, and 6 consultants/representatives from industry associations. GSA worked with us to develop design tools to stimulate deep discussion and challenge views around themes (terroir, authenticity, expression and narrative), and sub-themes (land and sky, history, place and making; people, values, discipline and organisation; quality, varietals, typicity and distinctiveness; storytelling, coherence, audience and relevance). We led discussions and decision-making on the

choice of themes, drawing on experience investigating strategy and challenges in the global wine industry, and engaging with industry actors in various territories.

The workshop discussions were recorded and transcribed. GSA analyzed the transcripts, and identified key themes. Our shared reflections, based on research notes taken during and after the workshops, and the transcript analysis, informed the presentation of those themes at a full-day workshop at the start of the March 2018 Wine Leaders Forum (held in Naramata, in the Okanagan). 19 people from 14 wineries and other organizations participated: 13 owners/proprietors, 1 GM/President/Manager, 1 winemaker, and 4 consultants/representatives from industry associations. Our critical reflections about the process at the end of the Forum, shared with each other and with GSA colleagues, informed the second workshop iteration, conducted without GSA.

(2) December 2018 workshops

We delivered 5 half-day workshops over the course of a week in December 2018. They were held in Kelowna, Penticton, Osoyoos, Langley, and Duncan [6]. 42 people from 28 wineries and other organizations participated: 18 owners/proprietors, 6 GMs/Presidents/Managers, 2 Marketing/Communications staff, 5 winemakers/viticulturalists, and 11 consultants/representatives from industry associations and other organizations.

In the first workshop iteration we had focused on generating views, listening to discussion, and gathering information. For the second iteration, we took a more active role as facilitators, generating dialogue between the researchers and industry actors. The relational dynamics developed with the industry over the years allowed us to share critical perspectives with the participants (drawing on the academic literature, observations, conversations, etc., e.g. by using Figure 1 in a poster to introduce the concept of identity and challenge industry perceptions at that time). Our fundamental concern was to create safe spaces for dialogue, and facilitate a collective process to share key insights about the territory's regions.

Our research approach throughout this process is congruent with the diverse set of action research practices (see Brydon-Miller *et al.*, 2003; Reason and Bradbury, 2008). It is participatory, problem-focused, action-oriented and reflexive. In line with Costamagna and Larrea (2018) on their experience as facilitative actors in territorial development [7], we continuously engage in self-reflection and debriefings (group reflections after meetings or workshops) structured around: *What happened? What did we learn? What do we know from the interaction, and how? What are the main issues that arose? What was expected and/or unexpected? How do we think the participants responded? How do we think our input on conceptual and practical issues influenced the discussion? What worked, and why? What did not work, and why? What could we have done, or should we do differently next time, and how?*

Typically in action research, researchers do not adopt the "distanced objectivist stance" (Boser, 2006, p.12). However, action researchers have to be careful to avoid capture by individuals, groups or organizations (Rapoport, 1970), and set boundaries for themselves, and with others. This is often achieved over time through various discussions to reach shared understanding.

From the beginning of our interactions with the industry, we were particularly aware of issues such as power imbalances between industry actors, and between the researchers and industry organizations. We have been explicit with the industry that we do not serve private interests, and have maintained our independence as academics collaborating with the industry, not working for it. Over time, we have been deliberate in expanding our reach across the territory, and in creating spaces for all participants to exercise their voices (Mooken *et al.*, 2018). All of the research activities in action research are not necessarily known in advance (Boser, 2006), which in our case means that we had to obtain informed consent at various points in the process. This provided explicit opportunities to the participants to voice concerns, ask questions and withdraw participation.

Our approach is based on long-term engagement with actors in the BC wine territory. This can only be sustained if they have trust in the researchers and the process. It requires us to be

ethically responsible in our practice, especially in what we present and represent, how, to whom, and when.

4. Engaging an industry on identity

Based on our work in BC, we developed and applied a four-step process for wine industry actors to explore the identity of a wine territory. The steps, depicted in Figure 2, are as follows: understanding identity; identifying commonalities and differences; developing a shared narrative; sharing best practice. What a wine territory is, and aspires to do and become, is not static. Because identity is lived and living, constantly changing as a consequence of choices and behaviour, and affected by external factors, the steps in our process may be applied in different places at different times, including when territories are established. Feedback between steps, and step iteration over time, are necessary.

Figure 2: Steps to engaging on identity
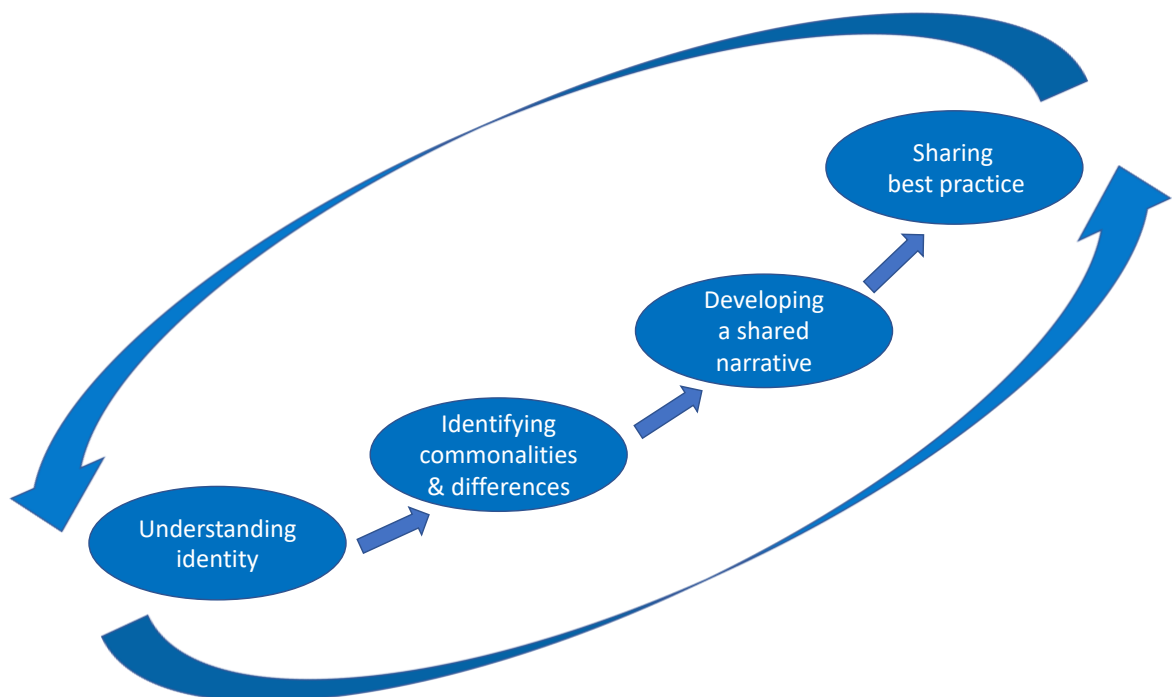
Understanding identity

The first step is to discuss identity as a concept, and the essential aspects of the territory's identity. Our process grounds the discussion in pluralistic forms of knowing and knowledge, from within the territory - not least, the experiences of the industry participants themselves - and from elsewhere. In practice, this work is progressive, beginning with an open, wide-ranging exploration to unearth initial views. Industry participants are asked to explain and evidence their conclusions. Perspectives about the wine territory beyond the participants' usual thinking are introduced (e.g. on public interests in the industry - Mooken *et al.*, 2018). Later, initial views are delved into, and refined. To ensure tractable outcomes, consensus is sought on 3-5 aspects. An objective is that, together, the aspects authentically describe the territory's essence, including its distinctiveness. As a consequence, they are the basis for its comparative advantage.

Identifying commonalities and differences

A wine territory is usually heterogeneous, e.g. in its geographical characteristics, ambitions, or products (Patchell, 2011). Those diverse elements must be factored into an exploration of the territory's identity. Awareness of such complexity leads to better understanding, discussion and outcomes. One way to raise awareness is to challenge established perspectives. Accordingly, when industry participants apparently agree on key aspects of identity, we question their agreement on the basis of commonalities and differences across the territory. It is an opportunity to discuss diverse views; to consider who and what is included and excluded, why, and to what effect; and to reinforce and adjust the key aspects agreed upon in the first step. As participants give space to a constructive dialogue, an objective is to foster their long-term collaboration. Beyond the work on identity, this step enables better understanding of the reality of other industry actors. As such (and echoing Capello, 2018, and Ditter and Brouard, 2014), it is a basis for mutually beneficial cooperation.

Developing a shared narrative

The iterative nature of our process rests in part on the premise that narratives evolve over time, constantly influenced by the context and interactions, and by perceptions of what is, and what is aspired to (Ferrari, 2014). Through the development of a narrative, people both make sense of the world, and construct the world (Bruner, 1991; Riessman and Quinney, 2005, on the meaning of narrative in wider contexts than wine). During that process, identity takes shape.

Narratives are social in that they involve an audience (Chase, 2003), whether present or tacit. Awareness of that audience may lead to tension between being truthful to the story – with the caveat that stories are shaped by particular ways of seeing the world, influenced in turn by culture and experience, and therefore can only be deemed verisimilar (Bruner, 1991) - and complying with audience expectations. For instance, a narrative that weaves a story from key aspects of the territory's identity built on culture and history, and authentically describing its essence and distinctiveness, may appeal to consumers that construct and value regional images linked to cultural traditions, but not others (Skuras and Dimara, 2004). In turn, compliance is linked to the potential for persuasion (Riessman and Quinney, 2005), a prospect that may impact the narrative itself.

Challenging established views and raising awareness of the multilayered character of narrative is a key aspect of our process. The aim is not simply to listen, but also to highlight aspects of the narrative that could shed meaning (Chase, 2003), and could help to connect individual stories into a shared one by "placing them in the wider social, cultural, and political context" (Bhattacharya, 2016, p.713). By challenging we perform the role of an audience, allowing for adjustments and modifications (Benford and Hare, 2015).

Similarly to other steps in the process, developing a shared narrative can foster collaboration, because "shared overall meaning… binds the participants in any situation or encounter together" (Benford and Hare, 2015, p.646). Exploration of a narrative becomes the basis for communication with the wider world, and the territory.

Sharing best practice

Each step in our process entails industry participants sharing about territorial identity. That offers opportunities to learn about best practices, whose significance is suggested by, e.g., Dodds *et al.* (2013) on environmental sustainability in New Zealand. Once participants have reached a consensus on essential aspects of the territory, and its distinctiveness, they can use those as focal points to learn from each other about best practices, especially in the contexts of their own territory and regions. They can thereby enrich their understanding of the territory's identity.

5.   Application to BC – Outcomes and findings

Between late 2012 and early 2017, our work with the industry laid the foundations for in-depth discussions at the workshops. Had we tried to host those workshops earlier, very few would have been prepared to trust and work with us on such complex, seemingly abstract notions, or appreciated the significance of a wine territory's identity. They would have concentrated on what they saw as more practical concerns, such as marketing plans and the next sale.

In 2012, we had not elucidated the four-step process introduced in Figure 2, but in essence we focused on aspects of Step 1. Even then, it was clear that appreciating the territory's identity would be crucial for the industry's development, and that the complexity of the concept required time for industry actors to understand.

By 2017, the industry seemed ready to work with us on a concentrated exploration of the territory's identity. Accordingly, we organized the first iteration of the identity workshops.

November 2017 to March 2018 workshops

In each workshop, we first discussed the identity concept, as a recap for those who had worked with us previously, and to introduce the concept to others new to the process. We then discussed the essence of BC's wine territory identity, and explored commonalities and differences, developing a shared narrative, and sharing best practice. Given the limited time in each workshop, some aspects

of the exploration were relatively detailed, others more rushed. Documents disseminated across the industry report on the workshops: the activity is described in Glasgow School of Art (2018), and analysed in Buschert *et al.* (2018) [8].

The immediate outcomes of the workshops were synthesised by industry participants at the 2018 Forum into 5 distinctive features of BC's identity, focal-points for future exploration (Glasgow School of Art, 2018, p.1):

- Diversity: in the people, cultural heritage, terroir, business models and wines being produced.

- Welcoming: by aligning with tourism and enhancing experiences for visitors and new wineries.

- Free spirit: reflecting the youth of the wine territory, with the fresh and lively wines produced, and the personalities that produce them.

- Boutique: recognising the many small wineries across BC's sub-regions offering face-to-face experiences and specialized wines.

- "Cool North": celebrating the distinctive climate and glacial-influenced terroir that also offers a spectacular destination.

A Forum participant combined these points to suggest the beginnings of a narrative: *A collection of diverse boutique wineries making crisp cool climate wines on our unique glacial landscape owned and operated by welcoming people who love to share their youthful attitudes* (Buschert *et al.*, 2018, p.15).

When reflecting on the application of our process in the workshops, we were struck by various concerns.

First, our own reluctance to challenge, as if we were to mine each participant's stock of knowledge instead of enabling different types of knowledge to be revealed and also created. We missed opportunities to contribute our academic expertise on the development of industries and economies, and on BC in particular.

Second, participants tended to express stories about their own winery, less so about their region or territory, for which there was no coherent narrative. They mostly had an appreciation of

the terroir in their particular region or sub-region, rather than for the entire territory, and communication across regions and sub-regions was lacking.

Third, participants typically discussed terroir in terms of soil, landscape and climate, and ignored the interaction between natural and human factors (Buschert *et al*., 2018). Yet in viticulture, for instance, "the history of the socio-economic environment may be important in understanding why a given vineyard has emerged in a given site and why it has prospered" (Van Leeuwen and Seguin, 2006, p. 2). This suggests a holistic approach to terroir and identity that goes beyond winemaking, to address wide-ranging social, economic, and cultural factors, all grounded in a sense of history. In BC, that includes not only the culture of earlier and more recent immigrants but also, most especially, First Nations.

Perhaps the human factor is not only ignored but also difficult to face. In BC, it may be problematic for the wine industry to interpret the regional, territorial, and global to formulate an authentic narrative that achieves distinctiveness (Voronov *et al*., 2013). The Okanagan, for instance, has built its image on an oasis aesthetic and idyllic development that is contradicted by local ecological and economic realities (Wagner, 2008; Sugden and Sugden, 2019). Possibly, expectations linked to a desire to brand BC wine as high-end clash with a narrative that is not settler-centric. Such considerations relate to Zamparini *et al*. (2010, p.387) on the potential gap between intended and projected image, and the need for a consistent story that reflects the "true nature" of the industry in order to develop a reliable reputation.

December 2018 workshops

Our reflections on the first workshops were uppermost in mind in the second iteration. We were also aware that iteration is vital to the process of engaging with an industry about identity, as the meaning of identity can be difficult to grasp, and contradictory views need to be accommodated. The exploration of identity requires time to reflect and share. Especially in an emerging territory,

where development tends to be characterised by individual initiatives fed by personal, often unshared beliefs, the attributes of identity can be hard to define.

In the December 2018 workshops, we deliberately challenged industry participants on their previous thinking. We focused on understanding identity, identifying commonalities and differences, developing a shared narrative, and sharing best practice - the steps in our process. Because the later steps are inevitably squeezed for time in a workshop, we highlighted opportunities to share best practice throughout the discussions; and provided, 30 minutes before the close of each workshop, a summary of participants' key points, and a comparison with points heard previously. That recap stimulated further discussion, and an emerging narrative for future reflection.

We focused discussions on diversity in people, cultural heritage, terroir, business models and wines being produced – partly to illustrate what the exploration of identity requires, in particular to enable greater depth of exploration in light of the analysis of data gathered at earlier workshops and other interactions. We aimed to ensure understanding of diversity as a concept, and its relevance to BC. We challenged views by comparing BC with cases around the world, and through questions whose answers required reason and evidence. We asked whether diversity is always positive (e.g. when it comes to quality), and queried how participants thought diversity in BC is perceived by people outside the industry (e.g. in terms of truth and reconciliation with First Nations). Given our concerns about ignoring human factors in terroir, we encouraged discussion of cultural heritage. Participants were asked, for instance, if there was anything in their heritage that they could identify as common ground, and the basis of what they are, or aspire to be.

To illustrate the outcomes, in Duncan, participants suggested that the identity of both the Vancouver Island wine region and the BC wine territory needs to be understood in the context of Canadian identity, suggesting the significance of multiculturalism, respect, inclusion, equity, and appropriation. They wondered if recognising that significance is aspirational, and were concerned about an exclusionary Eurocentric culture, especially regarding First Nations. A commonality stressed in all the workshops was the presence of small family wineries and farms (within and

beyond the wine industry). That was associated with values such as community, longevity, and sustainability. Such ideas led participants to discuss tourism, and the view that diversity stems from differences in visitor experience. Many concluded that, because BC is young and still experimenting – e.g. with the varietals best suited to its terroir - there is an aspiration to have focal-point varietals across the territory, alongside a diverse set of varietals offered by particular wineries. In every workshop there was concern about structural changes and their impact: about the prospect of large wineries buying more land and threatening the supply of grapes; and about large wineries marketed as small for the eyes of the consumer [9].

Our reflection on the December 2018 workshops is that industry participants responded positively to the increased challenge, and our probing. Interaction between natural and human factors was a prominent feature. Participants showed deeper understanding of identity, and refined their identification of commonalities and differences, but more time and understanding are required for them to develop a shared narrative.

6.   Conclusions, implications, limitations and future research

Exploring the identity of a wine territory implies willingness to address complexity. Conveying the importance of identity, and reaching consensus across people with different backgrounds and beliefs, are challenging. Although a valuable achievement, that consensus would be less relevant than the process leading to it, which opens windows to the "personality" of the territory and, accordingly, its wines.

Our four-step process, as applied in BC, reveals 4 elements that are critical to success:

(1)   *Building relationships with and across the industry, to stimulate collective learning and a cohesive voice*. The process to define an identity is driven by collaboration, and an identity only exists if perceived by most industry actors to characterize what they are, what they aspire to do and become, and how they are perceived by others.

(2)   *Creating independent, safe environments to discuss, conducive to free expression and openness, especially to work on the commonalities and differences across the territory.*

(3)   *Allowing for feedback, reflection, and reiteration of steps.* Within steps, and moving between steps, tensions and discrepancies arise that necessitate further exploration. Wineries find it easy to express thoughts on their own reality, notwithstanding the wider ecosystem, but what holds for a winery, or a region, may not hold for the territory.

(4)   *Making the time for complexity.* As with any introspection, determining the key attributes of identity shared by multiple participants requires time - to explain, discuss, and confront ideas, region by region.

The precise impacts of our work in BC are for future research. Until now, our capacity and funding constraints have prevented rigorous follow-up with industry bodies and individual wineries about the impact of the identity work on their strategies and operation. Informally, the work seems to resonate in discussions with the industry on other matters, e.g. R&D strategy. For instance, there appears to be an awareness of the "human" and the "socio-economic" in ways that were not obvious in the industry before the work on identity. More generally, following an 18-month stakeholder engagement process, in March 2019 Wines of British Columbia published a wine industry strategic plan, *Wine BC 2030*. The stakeholder discussions overlapped with the subject matter of the identity workshops [10], and the final strategic vision referred to "super natural terroir" and "diversity", with "celebrating diversity" one of the plan's strategic pillars [11]. The plan's communications strategy intended to cover the "identity of sub-regions within the larger picture of BC", and suggested a desire to have more synergy across the industry, including the development of "a unifying messaging platform that supports the overall vision while recognizing the relative strengths of its dynamic parts" (The Artemis Group, n.d., p. 3). However, any direct influence of our work on *Wine BC 2030* is not certain. Our sense is that in the first public presentation of the plan to the industry by Wines of British Columbia, the identity concept was an elephant in the room, perhaps a layer of complexity that would be seen to distract from practicality. Our work on identity might

have helped industry actors to ascribe words to issues under discussion, without those actors necessarily embracing the full implication of those words.

An important limitation to address in future research is that some voices have been relatively quiet – e.g. grape growers, who are often in different discussions to wineries in BC. Voices of other publics - citizens and communities - impacted by the industry must also be included, and our process needs to be applied beyond BC. That would confirm if and how it is relevant, and if adjustments are needed. It would be fascinating to compare emerging, re-emerging and established territories, and to evaluate if the history of established territories favours a reappreciation of their identity that might be translated into economic success.

Endnotes

[1] In theory, a region can also be considered a territory. We initially referred to BC as a wine region but soon realized that this would cause confusion among industry actors, because of the association of "region" with particular geographical indications within BC. Thus, we use the language of "territory" to depict everywhere in BC where the wine industry operates, and "region" to depict areas within the territory. For a description and map of the territory and its regions, see https://winebc.com/discover-bc-wine-country/ (accessed 7th December, 2020).

[2] The discussion in this Section draws on Buschert *et al*. (2018), a report we disseminated across the BC wine industry in summer 2018.

[3] Estimates from the mailing lists complied as part of our work with the industry.

[4] There are also wineries in the Kootenays, Lillooet, Shuswap and Thompson Valley. See the Wines of British Columbia website, https://winebc.com/discover-bc-wine-country/ (accessed 7th December, 2020).

[5] See the British Columbia Wine Authority website, http://www.bcvqa.ca/wine-regions-of-bc/ (accessed 7th December, 2020)

[6] As in 2017, we also offered a workshop in the Similkameen Valley but industry participants from there opted to join workshops in the Okanagan.

[7] We are conscious that our facilitation and active participation in the workshops - especially through the choice and discussion of key themes, cases and critical perspectives - may influence the process and outcomes. We are open about having our own voices as facilitative actors (Costamagna and Larrea, 2018) concerned with knowledge organization, and the development of the wine territory (Mooken *et al*., 2018; Sugden, 2020).

[8] The November 2017 workshops were also the subject of a short film, "British Columbia Wine Region: A Territory Exploring its Identity", available at https://vimeo.com/259497083.

[9] We reported these outcomes to the industry at the 2019 Wine Leaders Forum.

[10] Members and staff of Wines of British Columbia participated in our workshops, and had access to the reports that we disseminated. We participated in the stakeholder workshops on the plan, and provided feedback via emails and phone conversations to the planning consultants (The Artemis Group, and O'Donnell Lane LLP). Half of the 8 people comprising the Strategic Plan Scoping Project Task Group, which oversaw the planning process, regularly participated in our activities.

[11] https://winebc2030.com/wp-content/uploads/2019/11/WineBC2030-Infographic.pdf (accessed 8th December, 2020).

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