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**MASTER**

**STRUCTURING A LOCAL STRATEGY FOR A WINERY:  
GROWING WINE TOURISM ON A BUDGET  
THE QUINTA DA PLANSEL CASE STUDY**

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## ABSTRACT AND KEYWORDS

“Structuring a local search strategy for a winery: Growing Wine Tourism On a Budget.”

During the COVID-19 pandemic, much has been said about how companies embraced the digital era as a way to survive in such unusual times. This research has unveiled the reality of what it means to “embrace digital” for small companies and family wine businesses in the Alentejo region. The proposal aims to assist Quinta da Plansel in gaining a competitive advantage by providing a deep understanding of its competitor’s performance online by collecting information from a hundred and forty-three websites from the wineries within the region of Alentejo and a small survey of twenty-one inquiries to Quinta da Plansel competitors under the scope of database usage and targeted communication. From the operational point of view, streamlining daily operations is a key objective, namely facilitating the development of the database and educating staff members by introducing standard best practices of Business to Consumer interaction during the experiences. The expected outcome is the boost of its wine tourism results with little to no financial investment using free Google tools.

**Keywords:** Google Reviews, Digital Performance, Wine Tourism, Local Search

### **List of abbreviations:**

**SWOT Analysis:** Analysis based on Strengths, Weaknesses, Opportunities, and Threats

**APENO:** Associação Portuguesa de Enoturismo

**SMART:** Criteria for a well-defined goal, Smart, Measurable, Achievable, Realistic

**SPSS:** Acronym for Statistical Package for the Social Sciences

**SEO:** Acronym for Search Engine Optimization

**ROI:** Acronym for Return On Investment

**KISS:** Acronym for Keep It Simple Silly

**CLTV:** Acronym for Client Life Time Value

**B2C:** Business to Consumer

**B2B:** Business to Business

# 1. INTRODUCTION

## 1.1 Description of the company

Quinta da Plansel is a 70 hectares family winery founded by Dorina Lindemann in 1997 in Montemor-o-Novo, a small city in the district of Évora in the center of the Alentejo region. Her journey with wine started when she decided to follow Jorge Böhm – her father- steps in the wine business after completing her studies in Oenology & Viticulture at Geisenheim University, Germany. But it was 15 years earlier that the Lindemann family fell in love with Alentejo after her father had a boat accident around Lisbon back in 1961, giving the wine importer a chance to explore Portugal, where he ended up funding his own company. As the business progressed and their offers grew, so did the interest of her daughters. Dorina's older daughter Julia Lindemann is responsible for Marketing and Touristic strategy, while Luísa followed her mother's steps in Enology and Viticulture at the Geisenheim University.

Nowadays, Júlia and Luísa, Dorina Lindemann-Böhm's daughters, joined her in the project as Júlia Lindemann takes care of the marketing and communication department. In contrast, Luísa Lindemann joins the winemaking team of the Quinta as she continues her studies in her mother's footsteps by studying Oenology & Viticulture at the Geisenheim University.

Quinta da Plansel produces around 400,000 to 450,000 bottles each year, of which 70% of production is red, 30% is white, and 10% is rose, sweet wines, and sparkling. In terms of exports, Quinta da Plansel reaches 15 different countries. The leading countries in exportations are Germany and Switzerland. One of the most exciting and distinctive recognitions is their extensive scientific studies for vine selection, cataloging, and technical improvements of Portuguese grape varieties, focusing on Touriga Nacional, Tinta Barroca, and Touriga Franca.

## 1.2 SWOT Analysis

Table 1 SWOT of Quinta da Plansel

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Awarded wines</li> <li>• Good social media presence compared with competitors</li> <li>• Provide WSET certifications</li> <li>• Location</li> <li>• Contacts in high-paying markets (Germany, UK, Netherlands)</li> <li>• The openness of the staff</li> <li>• Entrepreneur mentality of Dorina (owner)</li> </ul>	<ul style="list-style-type: none"> <li>• Zero measurability of website social results ( managed by media agency)</li> <li>• Partnership with media agency is not working 100%</li> <li>• Limited budget</li> <li>• Marketing &amp; Wine Tourism staff need support and organization</li> <li>• Lack of internal communication</li> <li>• Weak database</li> <li>• Limited Human Resources ( number and qualifications)</li> <li>• Reliant on interns to develop basic tasks that are the core of business success. ( Need for specific skills)</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• The infrastructures have the potential to develop differentiated wine tourism offers while maintaining the family winery look.</li> <li>• Region and district recognition for historical landscapes</li> <li>• Regional competitors with poor digital performance and measurability</li> <li>• European Union funds for digitalization</li> <li>• The latent potential of visitors in the region</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of data regarding wine tourism in Portugal, with a particular focus on Alentejo.</li> <li>• Reduction of purchase power in Europe for the near future ( War in Europe, Inflation, Fuel sanctions to Russia and effects on energetic resources, transportations)</li> <li>• Potential awakening of competitors in digital performance.</li> </ul>

## 1.3 SWOT Analysis Summary

Quinta da Plansel has a great potential to improve operations and increase their brand awareness in the marketing where they distribute their products. However, there is a clear scarceness of internal communication and task assignments. They present a universal weakness to most family wineries in Portugal: the use of interns to develop complex tasks that must be set over extended periods.

Exiting the COVID-19 pandemic, the current developments with the war in Europe, and its impact on the global economy, it is foreseen an effect in the post-summer activities due to the reduction of buying power. As a result, Quinta da Plansel will now have to make the most of the internal resources and information collected regarding its customers.

## 1.4 Duties during the internship

One of the requirements for developing the thesis and, therefore, the conclusion of the Wine Tourism Innovation Master was the final internship with a minimum duration of five hundred hours. The initial practical internship was developed with a Croatian institution for four hundred and twenty hours. However, this cooperation ended due to circumstances outside the control of the student and the consortium. A new internship with a minimum of two hundred hours officially occurred at Quinta da Plansel, Montemor-o-Novo, Alentejo, Portugal, from April 25 to May thirty.

The short nature of the internship requested a pragmatic approach for both the tasks performed and the thesis development. Upon discussion of the urgent needs of the winery, it was proposed to start the immediate recovery of the database through all available sources to help promote the new touristic offers at the minimum cost possible - newsletters. Another developed as a competitor analysis from the wine tourism perspective. The goal of the approach was to provide Quinta da Plansel a competitive advantage over the competitors with the minimum use of human resources or investment.

*Table 2 Worksheet description with u. and hours invested*

Task description	Time (h)	Task description	Time (h)
<b>Local Search Optimization</b>	<b>18</b>	<b>Database (contacts) Recovery</b>	<b>156</b>
Product upload (24 u.)		Webshop. pt (215 u.)	
Prices (24 u.)		Webshop.com (50 u.)	
Images (24 u.)		WSET (80 u.)	
Link to a webshop (24 u.)		Wine Tourism Email (27 u.)	
Product descriptions (24 u.)		Cansu Loose data recovery (34u.)	
Quinta description (1u.)		Quinta da Plansel main email (357 u.)	
		Old database (630 u.)	
<b>Competitors analysis</b>	<b>94</b>	Cansu B2B recovery (356 u.)	
Collect a list of competitors (134)		Excel Formating	
Emails			
Website analytics (106)		<b>Do it yourself manual</b>	<b>1,5</b>
Google Reviews		<b>Reporting and Training</b>	<b>4</b>
Google Webshop Connection			
Contact Number			
Company description			

### 1.4.1 Main challenges

Finding an internship and negotiating the tasks to be performed on such short notice was, in a way, a challenge due to the potential outcome of not meeting the deadlines. Nevertheless, there were three main challenges from an operational point of view at Quinta da Plansel. The first challenge came from the absence of an organizational structure and knowledge of the importance of a database and its sources, which could have accelerated the data recovery quicker and extended the range of tasks performed during the internship. As a second difficulty, as the assignments were complete, there was a shortage of feedback on which direction to go next, even with direct approaches to discovering the challenges that the Marketing and Wine Tourism department suffered and how the intern could help them streamline their duties. The third and final challenge, as educate on the importance of minor changes in the current workflow of the Marketing and Wine Tourism department *modus operandi* of the Quinta.

### 1.4.2 Internship results

As far as results are concerned, the database recovery was a tremendous success, taking into account the goal of Quinta da Plansel in promoting the new offer of accommodation. In the early stages of the recovery, the poor condition of the initial database of six-hundred and thirty contacts was a cause for concern since 97% of those contacts were from B2B, as shown in Figure 2, and not entirely valid for direct communication with the end-user. Therefore, due to the lack of structure, the initial goal for data recovery for B2C was to set a hundred contacts.

A fellow Wintour college developing her internship at Quinta da Plansel developed an initial approach to collect scattered information regarding clients and partners in paper form documents. Four hundred and seventy contacts were recovered, where 76% were from B2B, and 24% were B2C, as shown in figure 1.

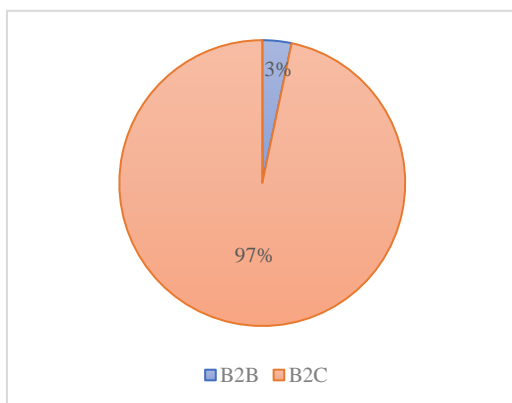


Figure 1. Quinta da Plansel initial database. B2B vs. B2C ratio in percentage.

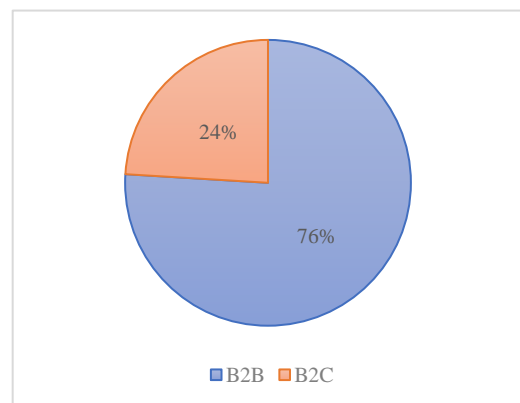


Figure 2. Quinta da Plansel database recovered by Cansu Ece. B2B vs. B2C ratio in percentage.



As stated in Figure 4, the midterm database resulting from the combination of the initial database, and the data recovered by Cansu Ece, increased by 1% the number of B2B contacts in the overall gathering. In numbers, the recovered contacts were hundred and thirteen for B2C and three hundred and fifty-seven for B2B.

As mentioned above, the goal was the recovery of hundred contacts that could be valid to direct communication with the end-user. Organizing an effective and independent data collection was crucial due to time limitations; therefore, it was requested to the Marketing and Wine Tourism department direct access to all potential data sources. The data was collected from the online webshop with the .pt domain and the .com domain having a combined result of two hundred and fifty-six contacts. The following step was to retrieve the more recent potential contacts; these were collected from the wine tourism email of the Quinta with a total of twenty-seven contacts.

The last source of collected contacts came from the general email of Quinta da Plansel, which is used for all business-related topics related to Quinta. The data recovery time started in January 2019 by analyzing emails and categorizing them into B2B or B2C. The data collecting task took a hundred and fifty-six hours to complete, mainly dedicated to this last data source, as shown in Figure 3.

In total, six-hundred and eighty-five contacts were recovered, of which 30% were B2B and 70% B2C.

The new and “final database,” as seen in Figure 5, currently counts one thousand seven hundred and eighty-six contacts, an overall increase of 183,4% on the available database.

The growth in the B2B database was 114,9%, and the B2C of 416%. The initial objective of recovering a hundred B2C contacts was surpassed by 382% with four hundred and eighty-two contacts. To conclude this task, hundred and eighty-three duplicate contacts were deleted.

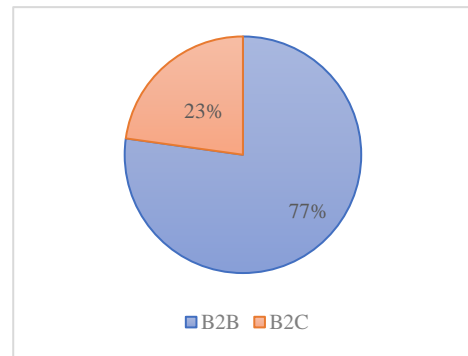


Figure 4. Quinto da Plansel midterm database. B2B vs. B2C ratio in percentage.

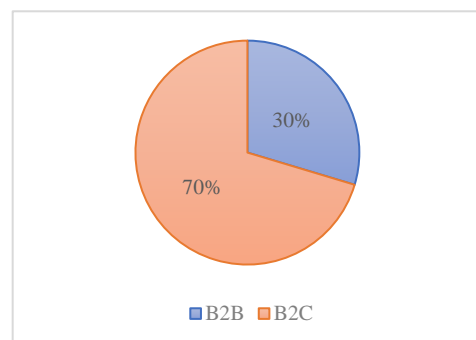


Figure 3. Quinto da Plansel internship data recovery. B2B vs. B2C ratio in percentage.

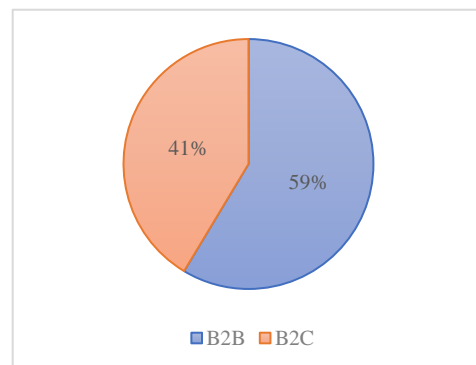


Figure 5. Quinto da Plansel final database. B2B vs. B2C ratio in percentage.

### 1.4.3 Organizing and educating

After the intensive work developed in collecting contacts to establish an operational database, it was necessary to simplify the data insertion process to ensure that this task would be done correctly in the future.

For this, all the information was collected into one single excel file. Therefore, the person collecting the data must insert the name and email and select the categories of the country of origin, B2B/B2C, source, and contact, as seen in Figure 6.

Full Name	Email	Country of origin	B2B / B2C	Source	Contacto
A.E. Redondo	aguiarredondo1@gmail.com	PT	B2C	Webshop PT	
Abel Pereira	abel.pereira11@gmail.com	PT	B2C	Webshop PT	
Acácio Lopes	acaciolopes@gmail.com	PT	B2C	Webshop PT	
Ademar Pereira	ademarademar@gmail.com	PT	B2C	Webshop PT	
Afonso Duarte	12duarte@gmail.com	PT	B2C	Webshop PT	
Alan Taylor	alan@alan.co.uk	UK	B2C	Webshop PT	
Alexandre Silva	alexandreasilva2011@gmail.com	PT	B2C	Webshop PT	

Figure 6. Quinta da Plansel database spreadsheet.

This excel has the particularity of being formatted to prevent the insertion of duplicate contacts and to avoid email campaign duplicate issues. For example, if the staff member inserts the same information twice by mistake, the line will become yellow, alerting for duplicate data.

wintour@gmail.com	PT	B2C	Visitors registration
wintour@gmail.com	PT	B2C	Visitors registration

Figure 7. Quinta da Plansel database spreadsheet. Anti-duplicate contacts feature.

As a personal objective, it was essential to ensure that they could insert the information that they might feel as being relevant without losing the several formatting that the spreadsheet had. With that in mind, a step-by-step file was made, as shown in figure 8, to assist the staff in introducing new variables into the document.

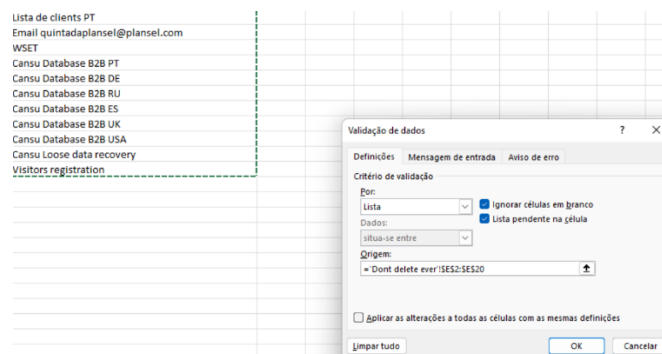


Figure 8. Quinta da Plansel step-by-step demonstration.

## 2. METHODOLOGICAL APPROACH

He who not only is ignorant of the enemy but also of his resources is invariably defeated<sup>1</sup>. A dangerous position in a time of information is the assumption of the competitor's work and plans. Today's marketing is highly dependent on data, even more so than any other resources, especially in the wine business in the last decade. This change is possible to observe in the current paradigm of the business, transitioning from a product-centric strategy to a customer-centric one where the client is where the value is, not only due to the widespread and easy access to the Internet but also from a competitive point of view. Competitors can copy equipment, products, and work methods of each other. Still, they cannot duplicate the knowledge, information, and intellectual capability the company gains from a somewhat painful process at times of "simple" trial and error.

### 2.1 Defining the marketing problem

Quinta da Plansel is currently struggling to grow and differentiate its wine tourism offers, a field that they intend to expand and monetize soon with the creation of accommodations and other touristic products and services. In the initial research stages, during the Analysis of internal procedures, it was clear the inexistence of an accurate understanding of their competitors' overall offers in the region, their potential on local search engines, engagement with their clients, or estimation of their overall performance and visibility online.

Upon further research, it became noticeable that the lack of information was extended to their customers, which poses a huge issue when planning a differentiated strategic marketing and communication plan for the business in the region.

### 2.2 The nature of research

According to APENO, there are no statistical or relevant data related to wine tourism in Portugal, neither regional nor national. Therefore, a mammoth data collection and processing undertaking took place to develop an approach pertinent to Quinta da Plansel and the thesis's development. The nature of the research took both comprehension and factual-based perspectives with the primary goal of understanding the fragility of digital strategies in the wineries in the region. The results were achieved by combining preliminary data of two scopes, one without statistical validity and a second with statistical validity.

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<sup>1</sup>Tzu, S., & Butler-Bowdon, T. (2010). *The Art of War: The Ancient Classic* (1st ed.). Capstone.

### 2.2.1 – Comprehension scope

To better understand the factual data collected on the technical approach, it's necessary to contextualize the results with a purely qualitative study with a broad specter and without great deepness in search of clues, tendencies, or attitudes that can reflect on the factual data. For example, one might obtain a competitive advantage by comprehending the competitor's perception of their knowledge of customer data collection and its impact on wine tourism through digital marketing efforts. The software used to process this data was Google Forms, and the comprehension scope was based on an email approach through an online questionnaire sent to hundred and eighty-three respondents. The response rate was 11,48%<sup>2</sup>, corresponding to twenty-one respondents.

The structure of this preliminary study consisted of seven closed questions using a (1 -5) Likert scale, divided into three blocks: Location, General Observation, and Database.

### 2.2.2 – Results: Digital Marketing knowledge

When questioned on Digital Marketing Strategy and the impact on their business, 52.4% of the respondents “totally agree,” 42,9% mentioned to agree to a large extent, as seen in Figure 10 —adding to a total of 95,3% with a high level of concordance<sup>3</sup>. In contrast, when questioned about their knowledge of general good practices of Digital Marketing, 42,9 % mentioned having “some knowledge,” and 23,8 % said little knowledge, as seen in Figure 9, indicating that 66,7 % of the respondents do not have the skills necessary to develop an effective online strategy<sup>4</sup>.

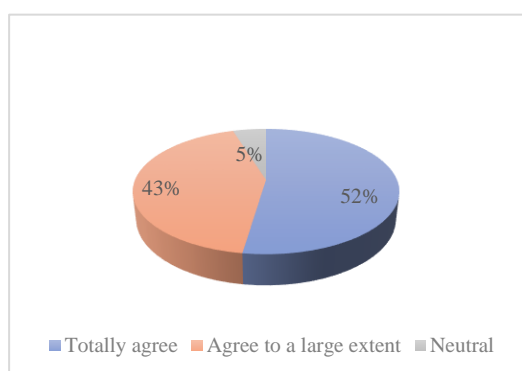


Figure 10. The competitor's own perception of the impact of Digital Marketing in their business in percentage..

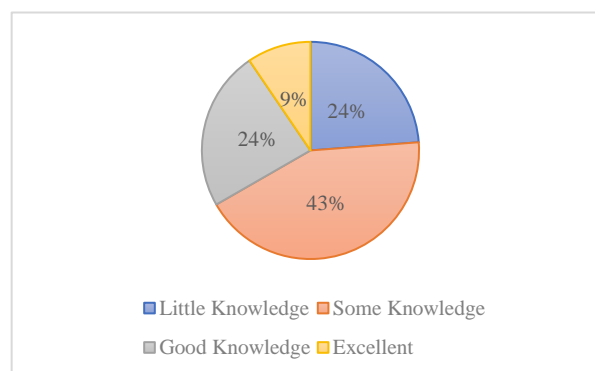


Figure 9. Competitors on the perception of their knowledge of Digital Marketing best practices in percentage.

<sup>2</sup> Martins, R. M. (2022). *Marketing Digital em Adegas*.

<sup>3</sup> Martins, R. M. (2022). *Marketing Digital em Adegas*.

<sup>4</sup> Martins, R. M. (2022). *Marketing Digital em Adegas*.

### 2.2.3 – Results: Database usage in wine tourism

Having extrapolated the Digital Marketing knowledge and their awareness of the importance that it might have in their business, it is not surprising that only 19% of the respondents do not collect any information regarding their visitors. But, when questioned if the data collected was used to develop a segmented communication with their clients, 66.7% of the respondents said “No,” as seen in Figure 12, and 57.1% revealed that they don’t consider the information collected when developing new wine tourism products<sup>5</sup> as can be observed in figure 11.

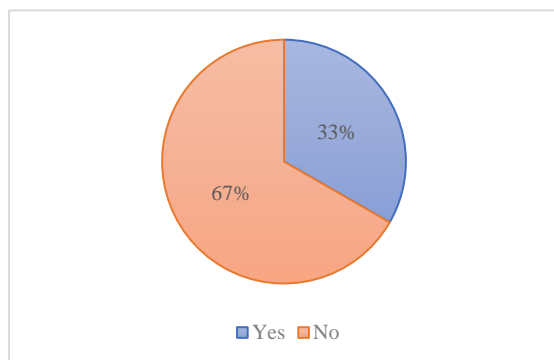


Figure 12. Database in wine tourism. Competitors use of database to develop new wine tourism products.

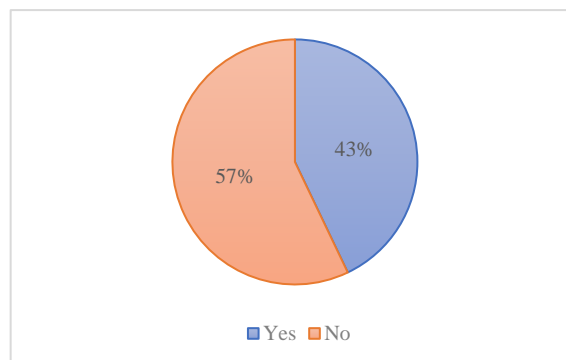


Figure 11. Database in wine tourism. Competitors use database for segmented communication.

### 2.2.4 – Factual scope

The factual scope will provide us with conclusive data analysis regarding the current digital difficulties of competitors with a focus on Local Search Engine, which will become determinant when setting the SMART objectives of the strategy. Discovering a pattern in competitors’ technical flaws will give Quinta da Plansel the advantage by focusing their human and financial resources on critical points that will improve their return on investment.

For this approach, the initial universe was of a hundred and forty-three wineries in the region of Alentejo. The initial contacts – emails and website domain- were collected from the Regional Viticulturist Comity of Alentejo website and then analyzed individually. Of the total universe, twenty-eight did not possess any digital presence. Therefore, they were removed from this study to ensure there would not be any significant pattern deviations and hurt future strategic marketing decisions, giving us a clean sample of a hundred and fifteen wineries. This information would be later processed using SPSS software. The research was developed by a personal analysis of the associate’s websites individually and dividing it into four keystones of a wine tourism digital presence: Digital Overview; Monitoring and Retargeting Tools; Local Search; Access to wine tourism offers.

<sup>5</sup> Martins, R. M. (2022). *Marketing Digital em Adegas*.

## 2.3 Data Analysis – Competitor’s Website on a regional level

An online Search Engine Optimization software was used for an initial overview of the competitors’ digital performance. The software in question for this study is seositecheckup.com on a webmaster version. The software measures sixty-six individual points that Google considers relevant from a technical point of view to rank a website higher on its search engine and provides a score from 0 to 100 scale.

### 2.3.1 Search Engine Optimization Overview

The search Engine Optimization score is highly relevant because it provides an excellent overview for search rankings, which are crucial KPI that directly correlate with SEO success. For example, in the studied universe, 50.4% have a mediocre overall performance, while 29,6% have good performance—only 2,60% scored above 85 points, as seen in Figure 13. Nevertheless, a balance between SEO performance and UX and UI is necessary, and no competitors ranked in the position “medium” are being penalized by Google<sup>6</sup>.

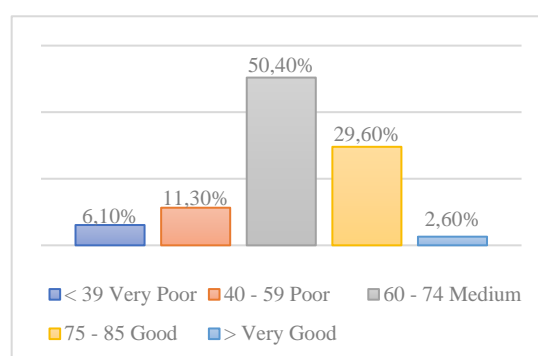


Figure 13. Search Engine Optimization Score of competitors in the Alentejo region.

### 2.3.2 User Experience Overview

As mentioned above, UX significantly influences Google rankings because time spent on a page is a ranking factor. Therefore, if the user can navigate through the page without experiencing issues, the bounce rate will be lower, thus reflecting on the page’s time and Google rank.

To better evaluate the website UX of each competitor, it was taken into consideration the honeycomb module of Peter Morville in his article on UX design<sup>7</sup> and the balance between the seven combs of UX. As shown in Figure 14, the results indicate that 35,7% of the competitors have an overall “Poor” experience on their website, and 12,2% have a “Very Poor” experience. A combined value of 55 users, referring to 47,9% of wineries in the region.

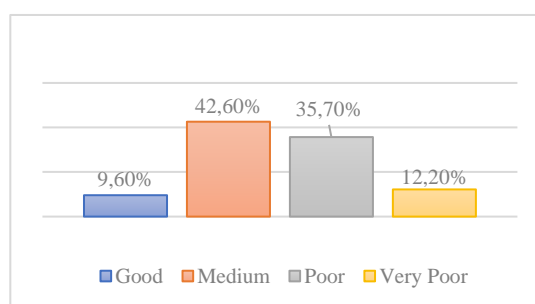


Figure 14. User Experience Overview of competitors in the Alentejo region.

<sup>6</sup> Martins, R. M. (2022a). *Competitors Analysis in Alentejo wine region*.

<sup>7</sup> Morville, P. (2004, June 21). *User Experience design*. Semantic Studios. [http://semanticstudios.com/user\\_experience\\_design/](http://semanticstudios.com/user_experience_design/)

Specific Morville's combes were analyzed separately and quantified to understand the individual fragilities of a competitor's digital presence<sup>8</sup>.

#### 2.3.4 Website accessibility

As it can be seen in Figure 15 regarding accessibility, 93,9 % of the competitors' websites do not have an ALT-TEXT attribute embedded into the website's images<sup>9</sup>.

This Attribute allows a description of the image displayed for visually impaired visitors – which Google has considered while ranking a website. But, it also can unlock the hidden potential for the Google Image search engine.

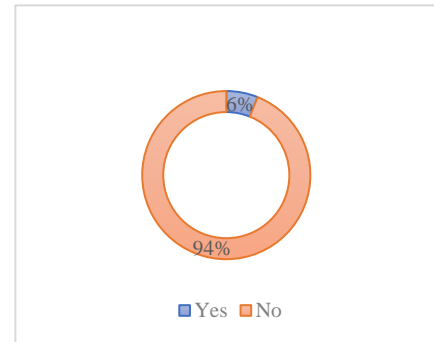


Figure 15. Usage of ALT-TEXT attribute by the competitors in the Alentejo region.

Another critical aspect of accessibility is the website's loading speed, where a page with a longer load time tends to have a higher bounce rate and lower average time on the page.<sup>10</sup> From a webshop perspective, longer loading times have also negatively affected conversions.<sup>11</sup> During this Analysis, it is possible to verify in Figure 17 that 62,6% of the competitors failed the Google Page Speed Insight test for the mobile version of their website. In comparison, 33% failed the Desktop version,<sup>12</sup> as shown in Figure 16.

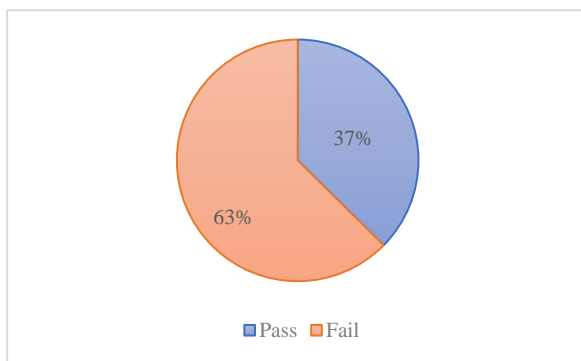


Figure 17. Competitors Page Loading Speed (Mobile) in Alentejo Region.

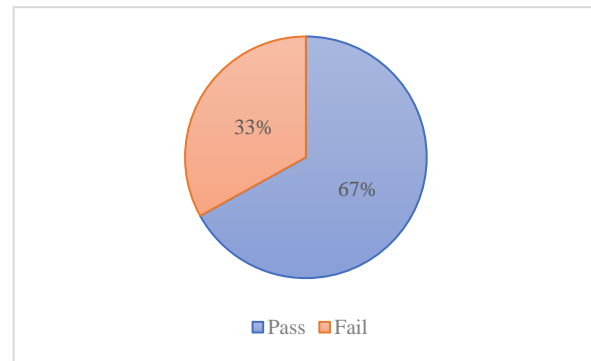


Figure 16. Competitors Page Loading Speed ( Desktop) in Alentejo Region.

<sup>8</sup> Martins, R. M. (2022a). *Competitors Analysis in Alentejo wine region*.

<sup>9</sup> Martins, R. M. (2022a). *Competitors Analysis in Alentejo wine region*.

<sup>10</sup> Moz. (2022, June 1). *Page Speed: How to evaluate and improve page speed*. <https://moz.com/learn/seo/page-speed>

<sup>11</sup> Moz. (2022, June 1). *Page Speed: How to evaluate and improve page speed*. <https://moz.com/learn/seo/page-speed>

<sup>12</sup> Martins, R. M. (2022a). *Competitors Analysis in Alentejo wine region*.

### 2.3.5 Website usefulness

It is the main business of a winery to sell wine; therefore, the preparation of a website is, at the core, a vehicle to increase the probability of selling the product by attracting new customers and providing them with relevant information that will potentially lead to a purchase. With this in mind, creating an online shop is fundamental.

In Portugal, the e-commerce B2C of products in 2020 during the COVID-19 pandemic, not including services, grew 46%, reaching a value of around 4.4 billion euros<sup>13</sup>.

As seen in Figure 18, from information collected, two years into the pandemic and one year through its peak, 59,1% of the wineries with a website do not have an online shop. Adding to this information but not providing a statistical focus on it, it's necessary to consider that twenty-eight wineries- that were not included in this study do not possess any online presence. Therefore, this reality of no website would place the inexistence of an online shop towards the 65%.

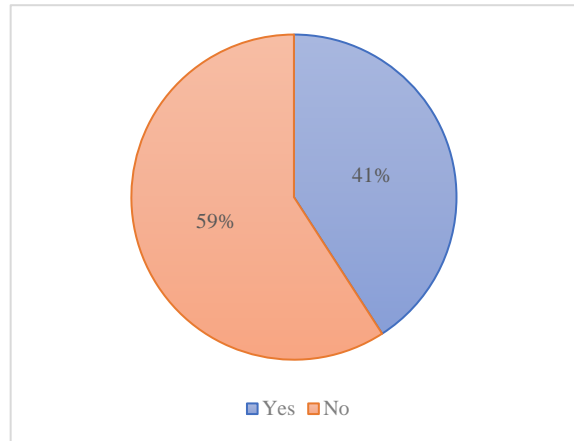


Figure 18. Competitors Analysis in the Alentejo region. Existence of a webshop in percentage.

### 2.3.6 Website usability

Mobile friendly stopped being a tendency when designing and planning the UX of a website, and it is now a standard feature due to the significant “weight” as a Google rank signal<sup>14</sup>.

The most recent studies on e-commerce purchase behavior in Portugal indicate that 55 % of online purchases are made through mobile<sup>15</sup>.

The research on this usability point indicates that 70% of the surveyed universe has a mobile-friendly website versus 30,4% that fail the Google Mobile Friendliness Test, as seen in Figure 19.

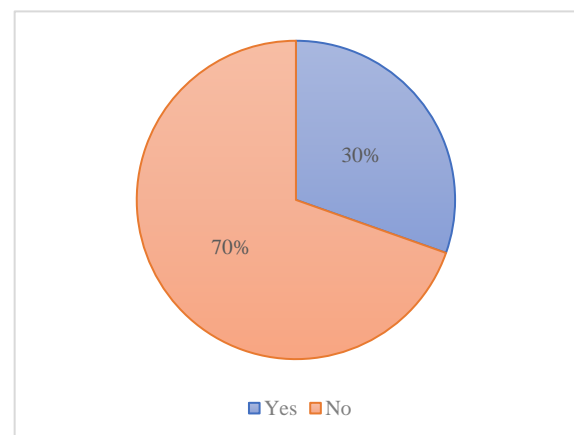


Figure 19. Competitors Analysis in Alentejo. Mobile Friendly websites in percentage.

<sup>13</sup> E-commerce report CTT. (2021, November). <https://www.distribuicaoahoje.com/wp-content/uploads/sites/2/2021/11/Relatorio-e-commerce-2021.pdf>

<sup>14</sup> WooRank. (2021). *How to Make Your Site Mobile Friendly for SEO*. <https://www.woorank.com/en/edu/seo-guides/mobile-friendliness>

<sup>15</sup> Kemp, S. (2021, February 11). *Digital in Portugal: All the Statistics You Need in 2021*. DataReportal – Global Digital Insights. <https://datareportal.com/reports/digital-2021-portugal>



### 2.3.7 Product findability

The best way to locate a product or service is through the shortest path possible from a user perspective. For this example of the honeycomb of Peter Morville of findability, the approach used was three clicks to find the desired product, either of “wine tourism” offer or selection of a product and its placement on the cart.

The study indicates that only 45% of the competitors analyzed have their offer visible in the website’s menu under “wine tourism” or “our offer.”

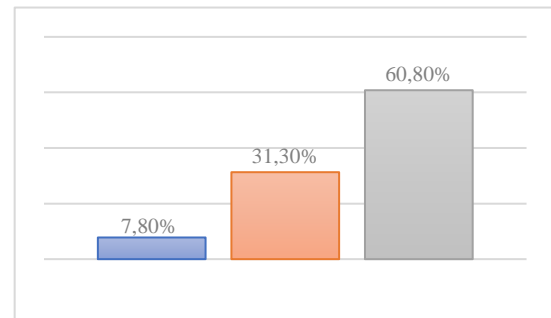


Figure 20. Competitors Analysis in Alentejo Region. Number of clicks to locate a product.

The click-to-checkout ratio of online shops was not considered for this study. Instead, the focus is on a five-plus click to find a product page with a call to action for the contact or purchase button. As can be observed in Figure 20, the research indicates that 60,8% of the analyzed websites “force” their visitors to do five or more clicks to find their products<sup>16</sup>.

### 2.3.8 Website content value to end-user

In most cases, a winery is a for-profit business, mainly focusing on a product-centered approach instead of a customer-centric one. However, this trend gradually changes with new wine tourist offers that increase the customer lifetime value. Regardless of the progress, the customer’s online experience is often placed as having a minor impact on the overall experience.

The study supports the theory that generating content online that can add value to a consumer or visitor in the

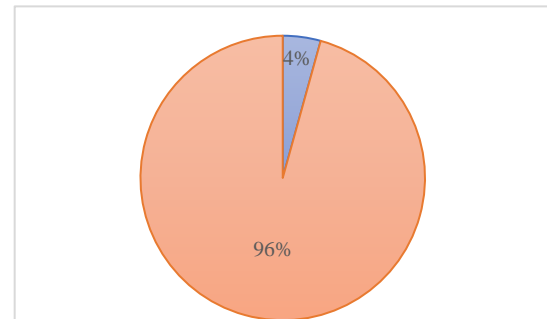


Figure 21. Competitors Analysis in Alentejo. Generation of relevant content to potential visitors (blog).

region of Alentejo is still less important than on-site work. For example, 95,7% of the wineries do not use relevant content to attract visitors and improve the overall experience, as shown in Figure 21.

<sup>16</sup> Martins, R. M. (2022a). *Competitors Analysis in Alentejo wine region*.

## 2.4 Data Analysis – Competitor’s digital analytics and retargeting capability

Digital analytics is, in short, the translation of the online customer or visitor behavior into actionable business data<sup>17</sup> that allows a company to develop a fact-based strategy instead of an opinion-based one. One of its most significant advantages compared with traditional marketing channels is the quality of measurability based on the company’s personal goals. The possibilities are limitless, from the number of visitors to a specific page to traffic by channel or the new and returning traffic ratio.

Google Analytics is a free tool that, even in its basic form – and easy-to-set mode, can provide game-changing insights to a company, especially to family-based companies like most wineries, due to their more extensive budget constraints.

According to the study, and as shown in Figure 22, about 55,7% of the websites do not have Google Analytics Tag; therefore, they cannot measure their website visitors. Neither can they understand their website’s “hot spots,” eventually relying on social media analytics to collect insights on their target audience. However, this last source of Analytics is not in the scope of this study<sup>18</sup>.

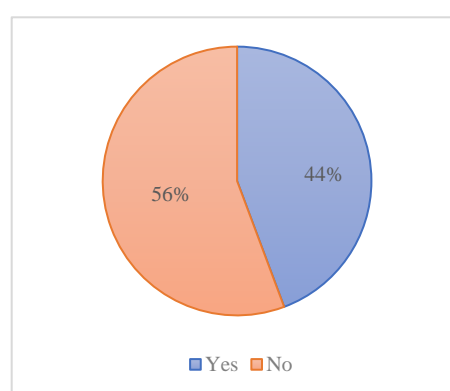


Figure 22. Competitors Analysis. Google Analytics Tag and measurability capability.

Google Analytics provides an array of tracking possibilities that increase exponentially in value when added to the Google Remarketing tag.

The Google Remarketing tag adds a piece of code to the company website to allow targeted Ads to specific events. For example, people that the webshop with products still in the basket but without purchasing.

When analyzing this tool’s use, and as seen in Figure 23, the study indicates that 93,9% of the competitors do not use the remarketing tag versus 6,1% that use it, demonstrating an excellent source of potential to explore<sup>19</sup>.

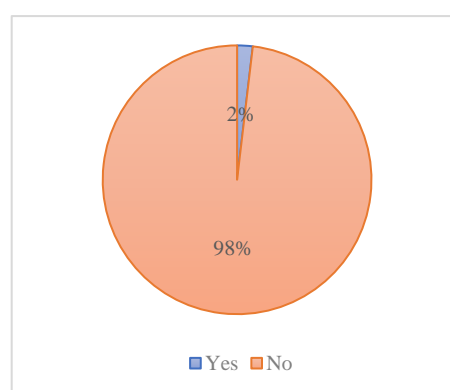


Figure 23. Competitors Analysis. Google Remarketing tag and the remarketing capability

<sup>17</sup> Hudson, E. (2021, July 12). *How to Blend Web Analytics and Digital Marketing Analytics to Grow Better*. Hubspot. <https://blog.hubspot.com/marketing/digital-marketing-analytics>

<sup>18</sup> Martins, R. M. (2022a). *Competitors Analysis in Alentejo wine region*.

<sup>19</sup> Martins, R. M. (2022a). *Competitors Analysis in Alentejo wine region*.

With Social media being a popular resource for businesses to communicate their products and services, Portugal is no exception, with 7.80 million social media users in January 2021<sup>20</sup>. The primary social media in Alentejo are Facebook, with 88,2% of national social media users, and Instagram, 75,3%, the range of users between sixteen to sixty-four years old<sup>21</sup>.

What is widely ignored by most wineries is that “social media” platforms have long been transformed into “paid media” platforms with constant cuts in reach, forcing companies to increase their budget for paid promotions to recover the lost organic reach.

By observing Figure 24, the research indicates that 84,3% of the regional wineries do not use Facebook Pixel on their website. This pixel’s a piece of code placed on the website. It helps them track conversions from Facebook Ads, build targeted audiences for future ads, and remarket with people who interacted with the website at some point.

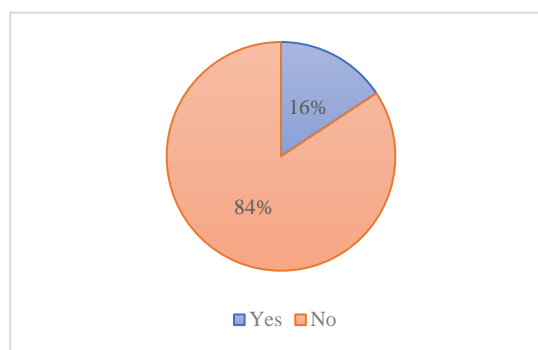


Figure 24. Competitors Analysis. Facebook Pixel usage on the website.

### 2.4.1 – Conclusion

The Analysis made to the Digital Website Overview survey indicates a lack of investment in on-page Search Engine Optimization, either due to economic reasons or the absence of a qualified workforce that could provide technical input. In the long term, they are losing the race on the development towards knowing the target audience and wine tourism development.

<sup>20</sup> Kemp, S. (2021, February 11). *Digital in Portugal: All the Statistics You Need in 2021*. DataReportal – Global Digital Insights. <https://datareportal.com/reports/digital-2021-portugal>

<sup>21</sup> Kemp, S. (2021, February 11). *Digital in Portugal: All the Statistics You Need in 2021*. DataReportal – Global Digital Insights. <https://datareportal.com/reports/digital-2021-portugal>

## 2.5 Data Analysis – Competitor’s Local Search overview on a regional level

Local search is often disregarded in the overall strategy. However, a few wine-related businesses fail to understand that local search has the potential to enable a company to rank higher on search results and increase the chances of the searcher contacting them for business.

Social proof has become a great source of influencing people’s perceptions of products and services without being in direct contact. As shown in Figure 25, 58,3% of competitors have less than twenty reviews on their profiles in the region of Alentejo, and 13,9% between twenty-one to forty-one reviews. Therefore, producing a baseline to develop the scale of this table was necessary<sup>22</sup>.

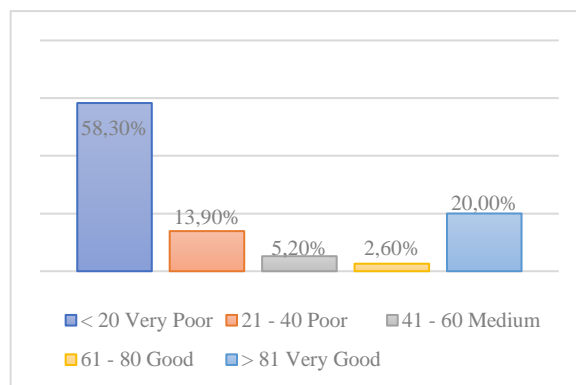


Figure 25. Competitors Analysis. Local Search (Google Reviews performance) on a regional level.

A sum of all the current reviews was divided by the number of surveyed wineries ( $6732/115= 58,5$ ). The total would be fifty-nine reviews on average. From this point, the table was developed in multiples of twenty. Another critical point of competitors’ Analysis is the after-sale performance. Regarding local search, 85,2% of the competitors do not engage with their customer’s reviews<sup>23</sup>, as shown in Figure 26. However, the competitors failed to understand that responding to negative and positive feedback indicates that the business is committed to listening to the customers’ concerns and exceeding their expectations<sup>24</sup>.

The mirror of the quality of a company’s services is the reviews score on local search engines. However, this study should not consider the score of reviews while developing a regional search strategy due to the lack of an effective formula to determine the importance of a score versus the number of reviews. Nevertheless, it can establish a point of equilibrium between the number of reviews and quality score.

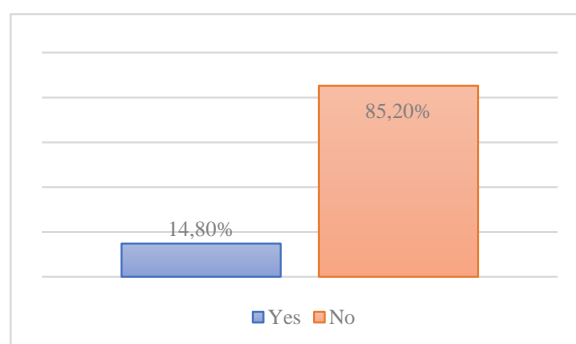


Figure 26. Competitors Analysis. Customer engagement in post-sale.

<sup>22</sup> Martins, R. M. (2022a). *Competitors Analysis in Alentejo wine region*.

<sup>23</sup> Martins, R. M. (2022a). *Competitors Analysis in Alentejo wine region*.

<sup>24</sup> Respond to Google Review. (2022). Hubspot. <https://blog.hubspot.com/service/respond-to-google-review>

## 2.6 Data Analysis – Competitor’s local search on a district level

When processing data to define an operational strategy, it is sometimes necessary to funnel information. At this point of the study, understanding the reality of the district is a must-do. This Analysis will allow us to determine SMART goals and a strategic approach within the closest competitors in terms of distance from Quinta de Plansel. By ranking the closest competitors with the Quinta’s performance, we will be able to rank them and establish a timeline for the objectives.

This district study involved seventy wineries. As seen in Figure 27, the highest percentage is the closest competitors to Quinta de Plansel, in Montemor-o-Novo and Arraiolos with 8,6% of the wineries and Évora with 18,6%<sup>25</sup>.

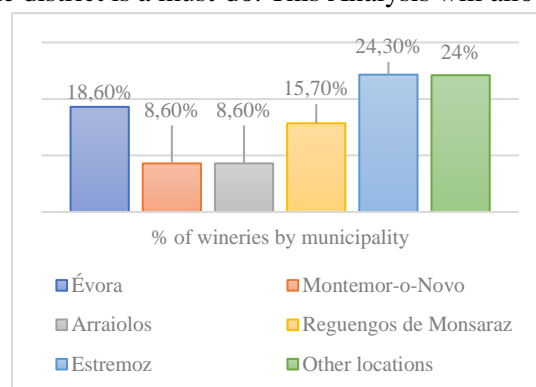


Figure 27. Percentage of wineries by municipality in the district of Évora.

It was established from the previous Analysis that social proof had become a great source of influencing people’s perceptions of products and services without being in direct contact. For the concern of this specific study, there is an enormous opportunity to explore social proof on a district level, as seen in Figure 28, where 62,9% of the competitors have less than twenty reviews on Google and 10% between twenty-one and forty reviews<sup>26</sup>.

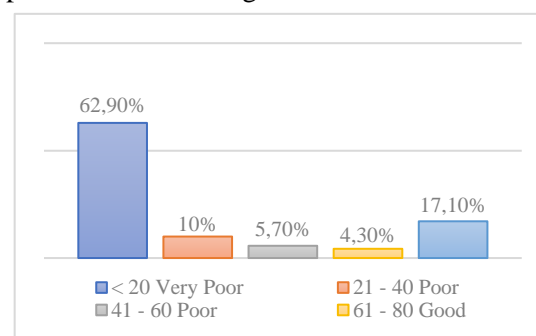


Figure 28. Competitors Analysis on district level. Performance on Google reviews in percentage.

The total percentage on the KPI number of reviews indicates that 72,9% of competitors have a very poor or poor performance on social proof. It can also be observed in Figure 29 that 90% of the competitors do not reply to visitors’ reviews of their products and services, and 77,1% do not provide any information to potential visitors on their profiles<sup>27</sup>.

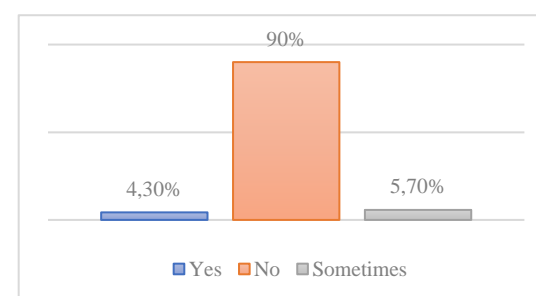


Figure 29. Competitors Analysis. Post-Sale Engagement through Google Reviews in percentage.

<sup>25</sup> Martins, R. M. (2022a). Competitors Analysis in Alentejo wine region.

<sup>26</sup> Martins, R. M. (2022a). Competitors Analysis in Alentejo wine region.

<sup>27</sup> Martins, R. M. (2022a). Competitors Analysis in Alentejo wine region.

## 2.6.1 – Conclusion

The first logical strategic approach will be to explore the local search engine from the information collected during the internship regarding internal procedures, the number of existing specialized personnel, and budgets during this period. Since it's less time-consuming when compared with other marketing tasks, it needs no technical knowledge, which means that anyone in the company can take over the job when needed. From a learning curve point of view, an array of online tutorials are available, and it's a free tool that can have a massive impact in the short term.

## 2.7 Montemor-o-Novo municipality infrastructures visitors' statistics (2019 & 2021)

By collecting data regarding the turística demand of Montemor-o-Novo for the year 2019, on a pre-COVID-19 situation, and 2021 in a post-COVID 19 recovery period, it will be possible to determine a baseline of the regular tourism flow in numbers at the public infrastructure in the municipality and potentially set a profile of visitors. This information will also give this study a better understanding of the main visitors of the region and the short-term target audience visitor.

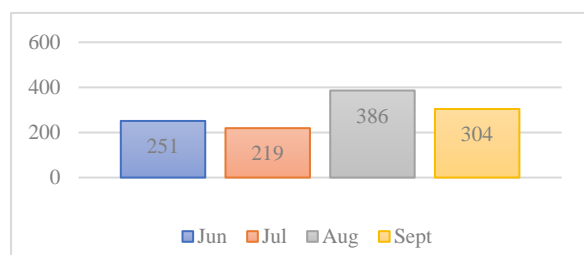


Figure 31. Total Visitors in Montemor-o-Novo (2019)

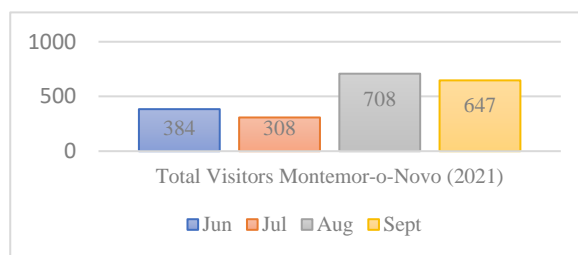


Figure 30. Total Visitors in Montemor-o-Novo (2021)

The data indicate that Montemor-o-Novo is mainly visited by natives, representing 86% of the total visitors during 2019, as shown in Figure 31, and 93% in 2021,<sup>28</sup> as shown in Figure 30. This data means a growth of 7% in local visits. However, it does not reflect visitors who use other information sources besides public tourism offices due to the impossibility of collecting such information.

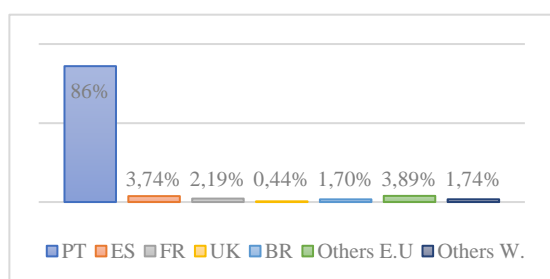


Figure 33. Total Visitors of Montemor-o-Novo by nationality in percentage.

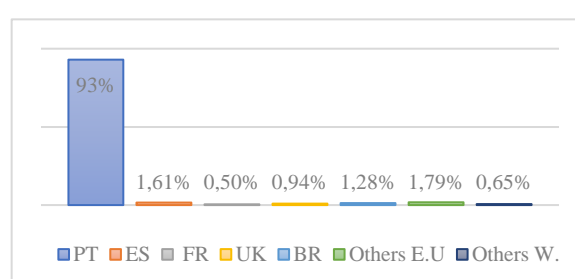


Figure 32. Total Visitors of Montemor-o-Novo by nationality in percentage.

<sup>28</sup> Tourism Office: Montemor-o-Novo. (2021). *Montemor-o-Novo visitors statistics 2019*. Camara Municipal de Montemor-o-Novo.

## 2.7.1 Évora tourism center – Touristic affluence and emitting markets

Évora has been a UNESCO world heritage since 1986 and is also one of the most famous cities in the Alentejo region. Therefore, it does not surprise the high number of visitors to the tourism office compared to nearby cities like Montemor-o-Novo. Following the same methodology, it was necessary to set a baseline of “normality” when analyzing pre-COVID 19 and post-COVID 19 touristic affluence for the city of Évora<sup>2930</sup>, which can be seen in Figures 34 and 35. The high season continues to be in line with Quinta da Plansel’s high season, despite the scorching weather in the region during this period.

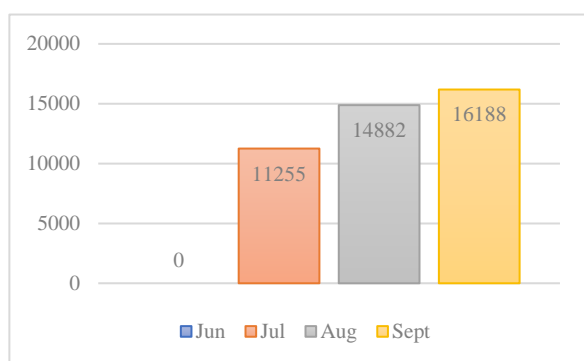


Figure 35. Total visits in Évora (2019/2020)

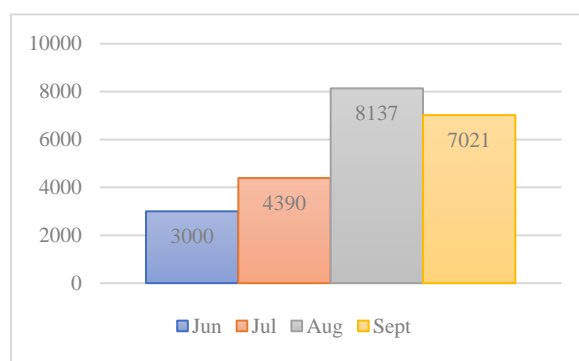


Figure 34. Total visitors in Évora (2020/2021)

A common denominator during the COVID-19 pandemic and still present in 2022 is the change in consumer behavior, where internal consumption has increased by 17%, with a minor increase of 2,75% from Spaniard visitors, mainly from closer to the border locations, as shown in Figure 36 when compared to figure 37.

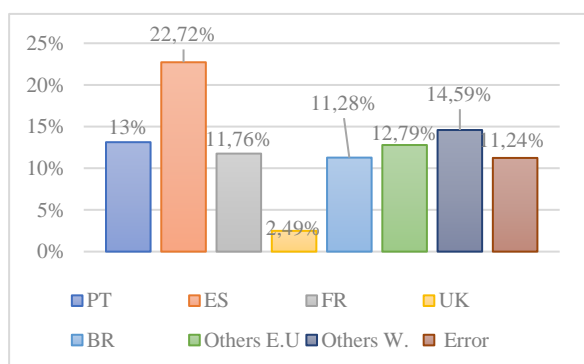


Figure 37. Total visitors in Évora by nationality (2019/2020)

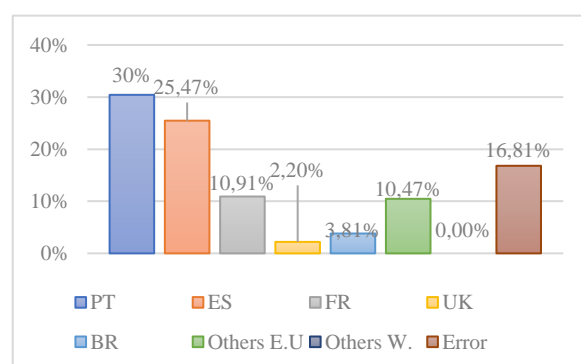


Figure 36. Total visitors in Évora by nationality (2020/2021)

<sup>29</sup> Câmara Municipal de Évora. (2019). *AFLUÊNCIA TURÍSTICA E MERCADOS EMISSORES 2019 / 2020*. Tourism Office Évora.

<sup>30</sup> Câmara Municipal de Évora. (2021). *AFLUÊNCIA TURÍSTICA E MERCADOS EMISSORES 2020 / 2021*. Tourism Office Évora.

### 2.7.2 – Conclusion

When combining both reports – Montemor-o-Novo and Évora, it is clear that local visitors constitute the more significant part of the visitors in the district. Therefore, a parallel study should be developed to clearly understand the average spent of Portuguese visitors vs. foreign visitors to determine who could be the better target (cost of acquisition and return on investment).

## 3. PROPOSAL

After a detailed analysis of all the data possible to collect during the given time frame and combining them with the most recent data of the Harmonised Index of Consumer Prices, which indicates inflation of 7,4% in Portugal during the month of April<sup>31</sup>. A local search engine strategy seems to be the best fit for Quinta da Plansel in the short term due to the prediction of a reduction in purchase power, maintaining the travel behavior on a more local level. As a consequence, an increase in internal demand seems likely. Therefore, changing the current status quo is imperative, promoting SMART goals that can bring short-term benefits (ROI) but acquire even more relevance over time.

This approach will consist of five key pillars that must be introduced to the company's current working method. First, the need to: grow the database, know the customer's profile, streamline processes, regular competitor checks, and SMART goal reviews. It will allow us to quickly stand out from the competitors in the region that are well known and visited with little effort. These pillars will be crucial to start paving the way for the long-term value creation of the wine business and provide a change in mentality for a global strategy.

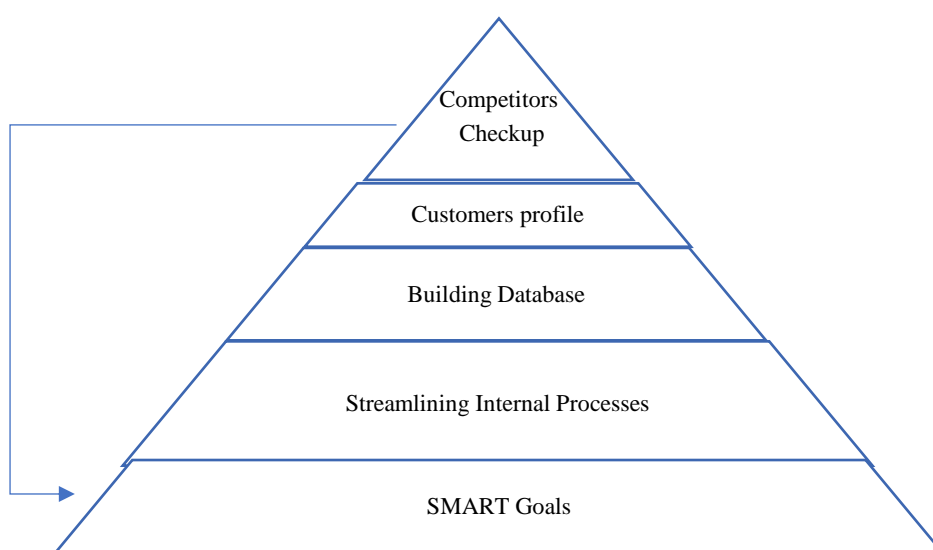


Figure 38. Key pillars of Wine Tourism Growth

<sup>31</sup> European Central Bank. (2022, February 7). *Measuring inflation - HICP*. [https://www.ecb.europa.eu/stats/macroeconomic\\_and\\_sectoral/hicp/html/index.en.html](https://www.ecb.europa.eu/stats/macroeconomic_and_sectoral/hicp/html/index.en.html)



### 3.1 Quinta da Plansel current digital local search strategy

At present, Quinta da Plansel does not have a local search strategy. During the internship, optimizations were made to their business account: a website shop connected to product display on Google Account development of a winery description. And initial steps were taken to prepare a local search engine strategy, but they have not taken place for the time being.

#### 3.1.1 Current local search overview

With the current changes made, Quinta da Plansel is now above current competitors in terms of local search optimization but still falling on the underperforming scope as most competitors.

Table 3 Quinta da Plansel local search overview

Winery description	Yes
Schedule	Yes
Products connected to the webshop	Yes
Name optimized	No
Review Score	4.8
Number of reviews	44

#### 3.1.2 Relevant statistics on Local Search Engine

When presenting optimizations in the current work methods of a company, one must present support material that can sustain the need for that optimization, either adding tasks, streamlining other everyday tasks, or combining both. As mentioned in this study, all data points toward the local visitor being mainly Portuguese, with 93% in Montemor-o-Novo and 30% in Évora, or Spaniards that live close to the Portuguese/Spanish border, with 1,61% visting Montemor and 25,4% visiting Évora<sup>32</sup>.

On top of that, four relevant statistics are necessary to comprehend this local context. For example, 46% of all Google searches look for local information<sup>33</sup>, and 72% of consumers who did a local search visited a store within eight kilometers<sup>34</sup>. Studies show that four out of five consumers will use search engines to find local information<sup>35</sup> and that 88% of searches for local businesses on mobile devices either call or visit the company within 24 hours.<sup>36</sup>

<sup>32</sup> Martins, R. M. (2022a). *Competitors Analysis in Alentejo wine region*.

<sup>33</sup> Cox, L. K. (2022, May 6). *16 Stats That Prove the Importance of Local SEO*. Local SEO. <https://blog.hubspot.com/marketing/local-seo-stats>

<sup>34</sup> H. (2022). *2022 Marketing Statistics, Trends & Data — The Ultimate List of Digital Marketing Stats*. Hubspot: <https://www.hubspot.com/marketing-statistics>

<sup>35</sup> *Search Insights & Trends*. (2022). Think with Google. <https://www.thinkwithgoogle.com/marketing-strategies/search/>

<sup>36</sup> *SEO Stats That Are Mind-Boggling, Must Know In 2019 — SEO Expert Brad*. (2022). SEO EXPERT. <https://seoexpertbrad.com/local-seo-stats/>

## 3.2 Taking competitive advantage

A good local search strategy and a surrounding digital strategy will work as a window of a coffee shop; if there is nothing on display, it will be hard for the potential customer to know what is there for sale. Under the Google review feature, Google My Business will influence how the end-user perceives the brand when doing local searches. For example, the local search study developed in the district of Évora demonstrates a transversal difficulty on all levels of a digital presence, not only from the competitors but from Quinta da Plansel itself.

In short, the region's current local search engine effort level is so low that any minor optimization can potentially lead to significant results. Thus, the KISS principle would be essential in an organization that has yet to streamline its operations and update its staff on how to use necessary and free marketing tools.

### 3.2.1 Determining factors contributing to Google Local search ranking

The formula to operate local search isn't very different from global search ranking at its core. Instead, Google tends to base all its search results on core factors that will support the end-user in finding the information he is looking for. One of the main factors contributing to the local search is relevancy, what the user is looking for, and what the winery offers that responds to the user's needs.

Location, location, location<sup>37</sup>, is still a prevalent quote when reporting key success factors in a business, either the proximity to the target audience or in a central position in the country and proximity to a motorway, thus facilitating logistics. Local search is no different, and Google considers the business's distance to the potential visitor's location; therefore, in local search, Quinta de Plansel will be competing with other wineries or wine bars that offer the same essential product.

Like all businesses, prominence is a factor determining the strength of brand recognition. For local search ranking, it works in the same way as to how well known a business or a landmark is, and the more information that Google has on them, either links, posts, articles, or reviews, the better the chances to cause a significant impact on local ranking.

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<sup>37</sup> (Samuel, 1949)

### 3.2.2 Setting minimum requirements on local search

After determining the three main factors for Google Search Ranking, it's now essential to set minimum requirements for Quinta de Plansel to increase its awareness in local search engines and distinguish the brand from its competitors.

### 3.2.3 Adding relevant information

By providing information about the company in the description box, namely about the products and services or the core value of the business, the company provides clear and relevant information to potential visitors. However, it also informs Google about the company's business. Therefore, it offers essential information to assist Google in matching the right searches.

Not only that but the importance of a physical address, a contact number, or an opening schedule can have a tremendous impact on the potential to attract a visitor or not, just by improving their experiences and being able to respond to potential doubts quickly and efficiently. By adding products to the Google My Business account, the Quinta is increasing their contact points to their webshop, thus increasing the potential for conversion and providing strong and clear information to Google on why they should locally rank the Quinta higher than competitors.

### 3.2.4 Data Collection

With the basic settings completed, it's time to understand the audience visiting the Quinta and improve the details of the wine tourism offer. However, one can not mention the importance of providing relevant information without knowing a customer, and it's challenging to introduce an inbound marketing methodology, where relevance is fundamental, without referencing the development of a database. In short, a database manages computerized relational information, in real-time, of comprehensive, relevant data on customers, inquiries, prospects, and suspects to identify the most responsive customers and develop high-quality, long-standing relationships.<sup>38</sup>

When discussing the importance of a database, one must determine the primary motivations for the marketing and wine tourism team to deploy human efforts to build a complete and adequate data collection. In many cases, the lack of a specialized workforce – or workforce in general, can deter the time investment or human resources for this quest. These can be, for example, the enhancement of marketing productivity by creating and developing better customer relations and creating a sustainable competitive advantage over other regional competitors.

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<sup>38</sup> Hughes (1996 p.4)

It is crucial to determine some variables that might be key to the future development of a touristic offer in the wine tourism context. For example, it's essential to know the customer, demographics, and points of interest that were visited during the stay besides the winery. Where they are coming from and where are they heading, or the traveled distance, either in time or kilometers, providing the Quinta with the minimum information required to develop a customer profile. Cross-checking with other sources of information can help create new partnerships, potentially increasing visitors. There is, of course, the vital information of first and last name and email that will be fundamental to increasing the customer's lifetime value.

### 3.3 Educating staff members

When analyzing the internal work process of Quinta da Plansel, especially their "self-awareness on digital marketing skills." It was visible that the winery realized the need to optimize its online image and develop brand awareness and trust. However, at the same time, there is a feeling of being understaffed in some vital points, which can delay an acceptance of new work methods or task additions. Although adding tasks to already overworked staff might seem counterproductive, adding the proper functions at the right time to an existing working methodology can save considerable time in the future.

Educating the staff members on why there is a need to use specific tools or add small tasks to their current work and how it can make their life easier in the long term can positively impact the mentality of the business. The improvements can also be achieved by breaking down barriers and allowing the team to innovate in doing things, and empowering them to share ideas and implement them.

#### 3.3.1 Planning

Planning is vital in setting goals for a business, but it is also essential to ensure that the objectives are achieved by avoiding random decisions, confusion, and chaos. By avoiding the spontaneous decisions, the winery will also minimize uncertainties, having better control over future events, thus contributing to the economy in operations, making them more efficient and economical. From a team moral point of view, planning can also positively impact optimizing human resources for a team that seems overworked. For the Marketing and Wine Tourism department, developing a clear communication plan with SMART goals for the entire semester will help automate and streamline the process and adjust when necessary, which is crucial in this shape-shifting world of social media.

### 3.3.2 Defining tasks

Defining tasks is one of the ways a team can streamline their work and make operations more efficient. By defining roles and responsibilities, the winery can motivate the workforce, as they feel responsible for operations' success or failure. If needed, a project manager should oversee the processes to ensure that all project elements are fully engaged, understand their task goal, and know their impact on the project.

### 3.3.3 SMART goals

From a business point of view, setting SMART goals is determinant to having impactful Marketing strategies, encouraging the business to look to the market and evaluate the competitor's performance and their own on a more constant basis. Another critical element often forgotten is the motivational impact that setting SMART goals has on the team. Setting clear goals eliminates confusion and frustration, and measurability allows the team to see the effort they are putting in and reward it. Most importantly, the knowledge that they are possible increases motivation.

For Quinta de Plansel, applying the KISS methodology with the SMART goals is necessary. With this in mind, the focus will be only on two tasks, the first being on increasing the reviews by 50% in six months, followed by a response rate by 100% in seven days after the review is set, and in two days period the case of a negative review.

### 3.3.4 Methodology

By introducing the use of QR codes embedded in thank you business cards delivered to each visitor at the end of the experience and with a request of review, one can predict an increase in the percentage of reviews by 75 % without making significant changes to the current operations.

For example, with a cost of thirteen euros per five-hundred business cards and a low ball estimate by a factor of three on the number of 50 visitors per month on average, the Quinta will deliver 300 cards in six months. By setting the goal of five new reviews per month, the winery can have thirty new reviews during that period at the cost of acquisition of 0.43€ just with this slight adaptation to their experience.

*Table 4 Cost of acquisition per review*

Number of business cards	Total cost	Cost per unit	Price per month in cards (50 u.)	Cost of acquisition per review in the period
500	13 €	0.026€	1.3€	0.043€

Further efforts can be developed using the QR code, either with the insertion of the code in the invoice of the wine purchase, accommodation, visitors of the cellar, or on a yearly email with a request for evaluation of services.

When referring to increasing the response rate by 100%, achieving the objective at first glance may look tough. Yet, one must consider that Quinta da Plansel does not reply to their visit, which means any change in work method will impact the goal. At the implementation point, the team will already be educated on why it is necessary to reply to customers. Also, the new objective for monthly reviews is five, which means five replies per month, with a time-bound response of two days after each negative and a seven-day time-bound to the remaining studies. The review of the objectives can be easily overachieved, causing some initial disturbance on the goals for the response rate. Yet, goals are meant to be reviewed regularly and adjusted to the winery's reality, always considering that the most critical part is initiating a change in mentality. The response rate will be measured by adding the number of reviews and dividing the number of comments multiplied by a hundred.

### 3.3.5 From Outbound to Inbound Marketing

With the education of staff members on local search, best practices, and work methodology, it's necessary to mention the importance of relevancy for local and global search engines, which was mentioned several times throughout the study. With the growing trend of thinking wine tourism into a customer-centered experience, re-thinking the customer approach from an exclusively outbound methodology, where the communication is pushed to the potential customer from various sources to introduce inbound methodology. Today, the average person is inundated with at least 2,000 outbound marketing interruptions daily<sup>39</sup>. Here is where inbound methods come into play, attracting potential customers by developing relevant content, products, engagement, and tailor-made touristic offers. The inbound methodology is a long-term strategy where the results can sometimes take seven months to a year to be seen.

With the slight shift in approach to the client, it's expected that Quinta da Plansel can, in the medium term, expand her sphere of influence in the region, consolidating its place as one of the top wine tourism experiences in Alentejo.

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<sup>39</sup> (Hubspot., 2021).

### 3.4 Growing wine tourism on a budget

Creating or improving a wine tourism experience doesn't necessarily mean an enormous investment. Optimizing human resources, streamlining tasks, and exploring networks can significantly benefit product development; as previously shown, optimizing a single point on a wine tourism experience, like the reviews, can substantially impact local search and potential visitors perceive the brand.

#### 3.4.1 Developing local partnerships

One of the most significant advantages of developing partnerships on wine tourism is extending the value of their core product without investing funds. Having the best service or product is subjective because every client will evaluate the experience differently; with that in mind, one needs to consider if the potential partner is aligned with the winery and the partnership's goals. In an optimal scenario, both businesses complement each other offers. For example, a horse-riding farm can provide carriage tours but does not have the means to offer vineyard walks or wine tastings. Then, in this case, activity "A" starts a chain reaction that will connect with activity "B" from another estate, purchased as one single package, increasing the overall experience since it was relevant and differentiated from others.

This type of cohesive partnership will bring to Quinta da Plancel opportunities to grow as a business, developing the database with the assistance of their partners in a more practical way. The resources available will increase exponentially and help provide better experiences without investment. With more exclusive partnerships with a brand that shares the same values, the potential of enhancing the brand's credibility as a reference in the region will also increase.

Another critical point is to establish partnerships with local public offices since these offices then develop events relevant to the community, allowing the brand to establish meaningful relationships with individuals and other businesses from the district.

#### 3.4.2. Newsletters

Creating loyalty to a brand has become increasingly challenging, primarily due to users' increasing daily messages online. With all brands selling their product as "the best product," from eco-friendly processes, with careful selection and hand-harvested in an optimal condition, maintaining connectivity has become a costly business. However, even with costs for paid media skyrocketing, some options still provide the best ROI while improving the Client's Lifetime Value for free.

With a return of 36\$ per dollar invested<sup>40</sup>, the newsletters continue to be not just the best tool for maintaining meaningful connections with visitors but also an essential tool to increase the CLTV. If it costs roughly five times more to attract new customers than to retain existing ones, it is only logical that more time should be invested in this contact point. The consumer knows the brand, has visited the Quinta or has tasted the product at some point; all the conditions are collected to maintain this connection.

For a small team like the existing one at Quinta da Plansel, the automation provided by newsletters tools can be fundamental in optimizing the available time for other essential tasks, like engaging customers in reviews. Another critical factor in exploring newsletters is the high potential for segmentation. With a well-developed database, the team will be able to know the average cart purchase of clients, thus creating opportunities for upsells through the e-commerce shop or simply to introduce other potential products or services that are in line with the purchases made at the Quinta.

### 3.4.3. Local events

Events tend to be overlooked due to inaccurate perceptions of the value they might obtain, especially when the goal is B2C. Due to the nature of the wine business, events with large numbers of end consumers might be perceived as not productive from a sales perspective due to the low numbers of direct sales. What is not taken into account is that the end-consumer is the same, a human being. Therefore, local events have the potential to be excellent contributions to brand exposure and mentions within the target audience or on local, regional, or even national levels by media.

To provide a more functional logic to this line of thought; the end-user tastes a wine of Quinta da Plansel at the home of these local events, a wine he/she enjoyed, perhaps purchased an on-site bottle to take home, and eventually, in the future will look for it on the webshop of the winery. Suppose the database is data collection operating as expected. In that case, local events are an excellent opportunity to grow the B2C database to communicate further wine tourism activities that are most relevant to wine tourism. This data collection can be done by inviting/interacting with the booth visitors to sign up for contests, giveaways, or a direct discount in the online shop.

Another great asset of participating in local events is the likelihood of boosting local SEO, with an increased brand search and reviews, thus contributing to the relevant and needed social proof. These events are also excellent opportunities to promote social media with user-generated content.

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<sup>40</sup> Kustka, M. (2021, September 13). *The ROI of Email Marketing [Infographic]*. Litmus. <https://www.litmus.com/blog/infographic-the-roi-of-email-marketing/>



### 3.4.5 Facebook lookalike audience for ads

As a final step, assuming that all the requirements were fulfilled in the previous points, the time has come for an exciting tool that, although it's a paid one, can significantly impact the growing the Quinta da database Plansel and increase sales. Facebook lookalike audiences with the customer list. Even in the current case, where the database is not complete with demographic that can assist in segmentation, if the email collected by Quinta da Plansel was used to register on a Facebook account, the algorithm will analyze the existing customer of Quinta's database and provide a "lookalike" audience based on age, location and interests, creating a brand new list of new potential customers that share similarities with the existing customers.

By using this tool, Quinta da Plansel will be allowed to expand its customer list cost-efficiently by only targeting users who are likely to purchase the product from them.

## 4. CONCLUSION

Internet transparency has made it easy for customers to compare products and services and faster commoditization. Thus, companies have to innovate in experiences beyond primary offerings. But most importantly, customers have been longing for genuine connections with brands, which paradoxically has become scarce in the connected era<sup>41</sup>.

For the region of Alentejo, the potential of Internet exploration goes way beyond the small scope of local search. Quinta da Plansel by its location, property size, staff, and knowledge that things need to change in their current status, is a good indicator of the development of the brand. To gain a significant competitive advantage in the lethargic state of the region, the brand must take the initiative to step into this field. Having the right people performing the right tasks at the right time and improving internal communication and organization skills will be critical factors to success.

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<sup>41</sup> (Philip Kotler)

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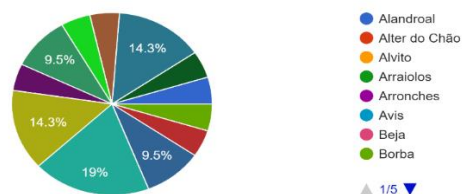
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## A.1 ANNEXES

### A.1.2 Comprehension questionnaire: Digital Marketing in wineries

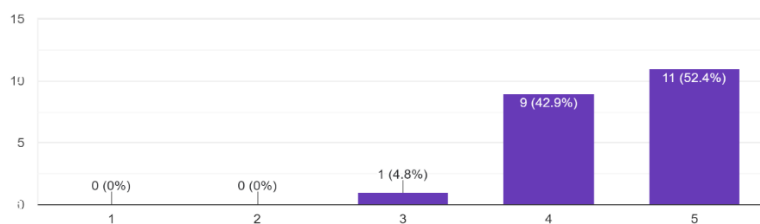
#### 1. In which municipality is your business located?

Em que concelho está o seu estabelecimento situado?  
21 responses



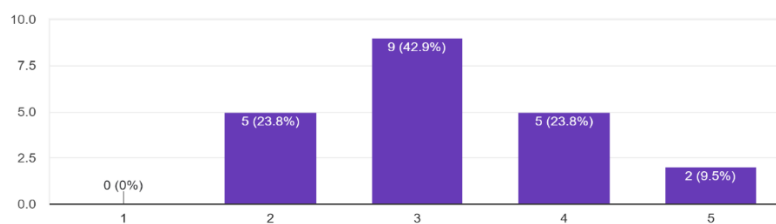
#### 2. Do you agree that a good Digital Marketing Strategy can significantly impact your business?

Concorda que uma boa estratégia de Marketing Digital pode ter um impacto significativo no seu negócio?  
21 responses



#### 3. How do you define your knowledge of Digital Marketing best practices?

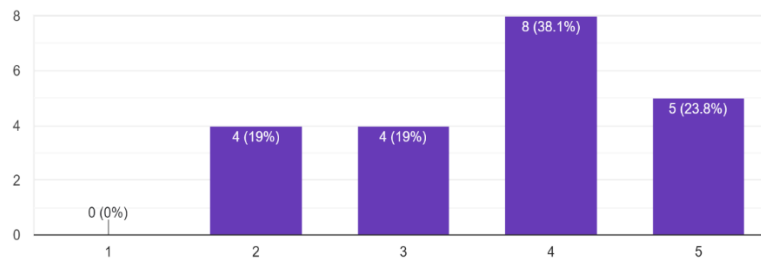
Como define o seu conhecimento de boas práticas no Marketing Digital?  
21 responses



4. How important do you consider the development of monthly workshops on Digital Marketing basics to improve your business?

Quão importante considera o desenvolvimento de workshops mensais no básico de Marketing Digital para melhorar o seu negócio?

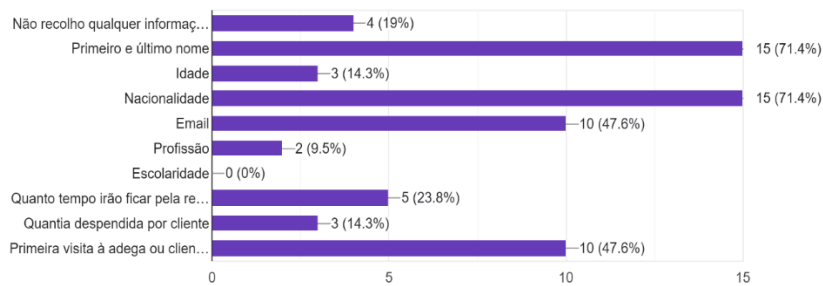
21 responses



5. Select the various options referring to the data that you collect from your customers.

Marque as várias opções referentes aos dados que recolhe dos seus clientes.

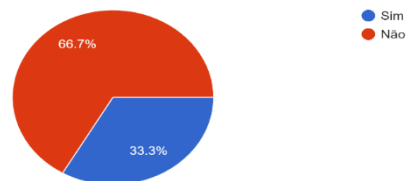
21 responses



6. Do you regularly use the information collected to develop segmented communication with your clients?

Usa a informação recolhida para desenvolver comunicação segmentada para os seus clientes regularmente?

21 responses



7. Do you usually consider the information collected from your database to develop your touristic offer?

Costuma ter em conta a informação recolhida na sua base de dados para desenvolver a sua oferta turística?

21 responses

