



THE IMPACT OF THE WINE ROUTES IN THE
INTERNATIONAL PROMOTION AND
EXPORTS OF THE PORTUGUESE WINE: THE
CASE OF PENÍNSULA DE SETÚBAL WINE
ROUTE

Manuel Maria Beirão de Oliveira Andrade da Costa

Nº 152114141

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Supervision: Nuno Cardeal

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ABSTRACT

The aim of this study is to examine the role of the wine routes as an international promoter and an export developer of wines. The focus will be in the Portuguese case, more specifically on Península de Setúbal Wine Route, also named Blue Coast Wine Route. Examining the wineries that are part of this route, the goal is to assess the impact of the route on the international image of the wines and exports and evaluate its importance and limitations.

Key words: wine, wine routes, wine tourism, international promotion, Península de Setúbal

RESUMO

O objetivo desta tese é avaliar o papel das Rotas dos Vinhos na promoção internacional e exportações do vinho. Vou centrar-me num caso português, mais concretamente na Rota dos Vinhos da Península de Setúbal, também designada como Rota dos Vinhos da Costa Azul. Examinando as adegas pertencentes à Rota, a finalidade é compreender o impacto da rota na promoção internacional da imagem dos vinhos, assim como nas exportações, avaliando a sua importância e limitações.

Palavras chave: vinho, rota dos vinhos, enoturismo, promoção internacional, Península de Setúbal

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1. INTRODUCTION

The rich history of Portugal is surely connected with its wines, especially its most famous wine, Porto. As reported by IVV (Instituto da Vinha e do Vinho) and INE (Instituto Nacional de Estatística), Portugal is in the 12th position as a wine producing country worldwide and in the 9th position in the international wine trade ranking.

According to the worldwide wine tours, what is unique about Portuguese wine is the very large number (upwards of 500) of indigenous grape varieties, which a great part of wine experts is unfamiliar with. As a matter of fact, through the years, Portugal is proving that in spite of a long history as a traditional wine-producing region, it still has undiscovered potential. Here comes the connection with tourism. In 2015, Portugal was one of the winners of the “International Best of Wine Tourism awards” in the competition sponsored annually by the Great Wine Capitals Global Network. With judges amongst worldwide leaders in different areas, such as tourism, food, hospitality, architectural, landscape gardening and cultural expenses, Museu do Douro – Museu de Território won as the Douro Demarcated Region’s representative, with a cultural heritage nominated as World Heritage by UNESCO. This makes clearer the potential of taking advantage of the visit of tourists to Portugal, in order both to raise awareness and enhance consumer’s education about the features of our wines and culture. Educate them can allow to gradually conquer future international prescribers of national wines (Portugal Wine Tour Travel Guide, 2008-2016).

So, understanding the importance of the wine industry in the overall economy, as well as the boom growth in Tourism (Soukiazis & Proença, 2007), make us realize how interesting it would be to join these two triggers of Portuguese economy growth. More specifically, the aim of this study is understand to what extent the Portuguese Wine Routes contribute to the international promotion and exports of the Portuguese wine. In order to better understand the main problem statement, there are some research question that complement and clearly define what does this study is planning to answer. The research questions are the following:

Research Question 1: What are the main features of Wine Tourism in an international context?

This is a question connected with the evolution of wine tourism and wine tourists - what is the international tourist looking for. Meaning, what are the main interests and attractions that drive them and make them choose one particular country and wine region rather than another.

Research Question 2: What tools are used to promote the Portuguese wines internationally?

Since the study is focused on the international promotion and exports of Portuguese wine, it is of the greater interest to understand the strategies used to pursue that purpose. Having that in mind, the spotlight will be in wine routes. How can tourism, more specifically Wine Routes, be used as one of the main developer tools of the Portuguese wine image abroad? What are the key success factors and main limitations?

Research question 3: What is the role of the Península de Setúbal wine Route as a wine promoter?

In order to understand to what extent the wine routes affect the commerce and international image of the Portuguese wines abroad, the foundation for this research will be a case study on the Península de Setúbal Wine Route, also named Blue Cost Wine Route. This route is situated in Palmela, Setúbal, considered the European wine city in 2012. Based on a theoretical background and an international overview provided in the Literature Review, the aim is to gather both quantitative and qualitative research. Qualitative research based on interviews on people from the Península de Setúbal Wine Rout but also on some other industry stakeholders in order to gather some exclusive insights about the Portuguese wine and tourism. Quantitative research based on a survey carried out to the wineries that belong to the Wine Route. Variables like number and nationality of visitors, national and international demand, marketing tools involved, among others will be relevant for that purpose.

The thesis format will start by having a literature review, than the methodology used to gather information and data analysis. Finally, it will have the conclusion and most important findings, as well as the limitations and recommendations on possible future researches regarding this topic.

2. LITERATURE REVIEW

2.1 Wine Tourism

“As anybody who loves wines knows, the regions where the finest wine is made are special places - even magical. And most everybody who loves wine wants to see where the magic is being made”. This is a well-known sentence mentioned by the international magazine “Wine Spectator”, in 1997 and it’s in the route of Wine Tourism essence. (Ready, Set, Go, 1997). Wine Tourism is, therefore, a form of tourism that relies on the travelers desire to visit wine-producing regions or in which they are induced to visit wine-producing regions, wineries particularly, while traveling with other purposes (Getz D. , 2000).

Although there is no uniform approach when defining Wine Tourism, the same author underline three major perspectives on the subject: that of wine producers, consumers and tourism agencies. So, wine tourism can be seen, simultaneously, as a marketing opportunity for wineries to promote, educate and sell directly their wines to consumers; a form of consumer behavior and a strategy by which destinations can promote and develop wine-related attractions.

2.1.1 International Context

In order to best understand the birth of Wine Tourism, also called “Enotourism”, it is crucial to recognize the multiple links connected with this new sub-field of tourism. From previous research, the crucial factors for wine consumer satisfaction have been perceived as not only the quality and availability of the wines (O’Neill & Palmer, 2004), but as a combination of a broader range of factors. It is important to identify the host community offer in terms of sustainability (Poitras & Donald, 2006), as well as the potential relationship between the wineries and the destination image (Scherrer, Alonso, & Sheridan, 2009) and gastronomy (Wargenau & Che, 2006) as sources of local wine tourism growth and promotion.

This new tendencies are strongly connected with the developments in the global wine industry. Tourism, as a wine promoter and developer, as not been seen as important for the European wine industry when compared with the “New world”, the newer wine producing areas (Wargenau & Che, 2006). This have had direct implications, illustrated with the modest growth in more traditional wine producing countries (such as Spain and France) and the substantial growth in countries considered as non-traditional wine producing countries (mostly located in

the Southern Hemisphere, particularly Australia, Argentina, Chile, New Zealand and South Africa, and some in the Northern Hemisphere, such as the USA and Canada (California)) (Alonso, Bressan, O'Shea, & Krajsic, 2013).

However, changes are also starting to occur in European countries regarding the wine culture. For instance, Spain and Italy are taking a more serious and coordinated approach to the wine tourism development. Spain, from the last 10 years, have been investing in new wine routes, as well as new wine and food festivals in multiple wine producing regions (Tomás, Sánchez-Cañizares, & García, 2010). In Italy, the goal has been to diversify the wine tourism offer. Moreover, regardless of the not well-structured and organized marketing campaigns of wine events, in the demand side, (Romano & Natilli, 2010) acknowledge the world-wide popularity of Italian gastronomy. The crucial point is the gradual increasing importance given to stablish strategies to preserve the traditional wine producers and innovate, keeping in mind that wine consumers are constantly becoming more demanding (Barrena & Sanchez, 2009) and there is a considerable scope for wine tourism to grow (Alonso, Bressan, O'Shea, & Krajsic, 2013).

2.1.2 Importance of the industry stakeholders

Noticing the importance of Wine Tourism in the overall wine industry, it becomes also imperative to measure the impact of service related elements and other stakeholders in this process.

In the Australian's wine sector, the government had played a crucial rule in the wine tourism, promoting events and festivals, staff formation or just facilitating information between business and marketing strategies (Wargenau & Che, 2006). The same for Spain, where the lack of infrastructures or resources was overpassed with the government institutions support (Hall & Mitchell, 2001). In Italy, non-profit and non-governmental entities such as the "Movement for Wine Tourism" collaborate in wine fairs, seminars, as well as in wine tourism itineraries with the local communities. This organizations has been responsible for many activities, above all marketing, in order to enhance Italian competitiveness in this industry. This is especially relevant given the lack of economic resources and tourism capabilities that characterized mostly southern Italian, highly represented by small and medium enterprises. (Presenza, Minguzzi, & Petrillo, 2010).

Regarding other industry stakeholders, it comes out the expression “Wine Tourism Supply Chain” that includes a broad range of cultural, recreational and wine related activities. It incorporates both tangible (quality of the wines) or intangible (services) standards that play a crucial role in the consumers’ education. This is connected with the hedonic and experiential nature of this kind of tourism, which has broadened the range of “winescape” tourism components. Wine tourists, within other activities, seek for shopping, dining, and cultural and recreational outlets, that should be part of this “industry” supply chain (Quadri-Felitti & Fiore, 2012). All this, allied with a sustainable and profitable relationship between wineries, local suppliers and local community (Croce & Perri, 2010), make regional stakeholders have all capabilities for enhancing wine brand awareness not only at a national but also at an international level (Koch, Martin, & Nash, 2013).

2.1.3 Wine routes: critical success factors

Seen as a programmed and structured itinerary to visit a wine region, wine routes combine the wine enthusiasts and who is interested and fascinated by the country's landscape, heritage, culture and nature. The strategic goal for this kind of tourism is to become not only a region promoter but also a tool to improve the image and reputation of the regional wines (Marques & Santos, 2014). So, how can some itineraries through a wine region become a successful way of tourism?

As paradoxical as it might look at first sight, the success of a wine route is highly dependent on the cooperation between service providers through the region. This cooperation means that wineries must work together, both formally and informally, with their rivals, to boost the wine route's benefits (Telfer, 1999). Besides that, although there is a consensus among researchers that tasting wine is, undoubtedly, the “raison d'être” of any route, alone is not enough to sustain the wine tourism growth (Scaddan, *Wine Tourism Around the World: Development, management and markets*, 2000). This is so given the relevance of marketing activities for wineries, such as events, international fairs and other communication activities. The promotion activities can be even more effective if combined with other complementary activities, such as gastronomy, architecture and heritage, mountain biking, sailing, golf, etc (Scadden, 2000), (Dodd, 1995), (Scaddan, *Wine Tourism Around the World: Development, management and markets*, 2000).

In this line of thinking, when deciding upon a wine tourism experience, wine consumers, especially in a long distance, prefer destinations which can provide a wide range of cultural and outdoor attractions. (Getz & Brown, 2006). Wine-travel patterns have been changing and shaping attractiveness criteria for wine tourist. In order not to lose the distinctive appeal as a destination for wine tourists, wineries must create “added value” for visitors. They must keep providing high levels of service quality as a source of competitive differentiation (O'Neill & Charters, 2000).

Last but not least, the process of globalization has meant that, nowadays, internationalization is not just an alternative that small and medium-sized enterprises (SMEs) can decide to follow, but a sine qua non condition for survival and long term sustainability (José & Alegre, 2007). This reality is embodied in the wine sector, given the increasing importance of the international context explained before. So, wine routes success is also dependent on human capital, innovation, advertising, size and organizational experience resources they have and they involve in managing the international presence. The goal is either to fulfill or even exceed the global wine route standards. (Olmos, 2011)

2.1.4 Motivations for a wine tourist

The motivations of wine tourists play an important role in the overall understanding of wine regions and wineries/cellar doors regarding their customer's needs and prospects, especially in the experiential nature of wine tourism. (Alant & Bruwer, 2004)

First, wine tourist behavior has an inherent element of hedonism. Since the tasting of wine involves alcohol and there are links with food, a social aspect in a relaxed environment, this point to an indulgent activity (Dodd, 1995). What is more, (Alant & Bruwer, 2004) also support the idea that most visitors are actual or potential elements of a specific segment of lifestyle beverage, which seek for wine-related experiences.

Moreover, based on a sample from Australian wine tourists, a study conducted by Charters and Ali-knight conclude that one third of the wine visitors are called “wine lovers”. This are wine tourists that look at a wine experience not only as a leisure experience but also desire an educational part, learn something from it. Although this might look that the criteria used for the wine destination is essentially the learning experience provided, the same study also concluded that there are a bunch of other features, not just wine-related, that appeal wine

lovers. (Charters & Ali-Knight, 2000). The symbioses between wine and food, increasingly combined with other cultural elements, it is giving rise to the so called “thematic tourism” (Tomás, Sánchez-Cañizares, & García, 2010). The same authors support the idea that, especially in Europe, this type of product is intended to complement traditional tourist products, working as a mean to stimulate tourist’s interest in new destinations, in places thus far uncommitted in tourism-related activities. This has had repercussions in tourist’s motivations. Alan and Bruwer mentioned that, when looking at the purpose of the trip, tourists, especially first time visitors, see wine tourism as a part of a holiday or getaway. Then, regardless of the unquestionable importance of wines and wineries both for first-time and repeated visitors, sightseeing and attractions are becoming crucial motivations. (Alant & Bruwer, 2004).

So, the place of wine in people’s daily life has been examined and the conclusions were that travel, entertaining, having dinner out, the so called experiential aspects of lifestyle play a more determinant rule than the materialistic aspects (Scadden, 2000).

2.1.5 Wine Tourism as an export tool

In a global environment, exports play a fundamental role as it is considered the quickest and simplest way to access foreign markets. (Majocchi, Bacchiocchi, & Mayrhofer, 2005). So, what is the relation between exports and wine tourism and how can wine tourism be used as an export tool?

Wine tourism and wine exports are connected in a way that should be mutually reinforcing. According to a study conducted by (Sharples, 2002), the reputation and exports of Chilean wines fuel wine tourism to that country. Consumers who have experienced a wine-producing region might be more likely to become loyal customers and become a word-of-mouth marketing tool, by spreading a positive word about the wines.

Regarding the dynamics of this interaction and the resulting pattern of travel preferences and choices, (Fischer & Gil-Alana, 2009) refer that the effects on exports of international tourism are not only “positive” and “statistical significant” but also “relatively long-lasting”.

However, that requires a rigorous “planning and budget allocation”, targeting the right tourist groups, in order to allow tourism promotion to become a major export developer.

2.1.6 Portuguese Wine routes

In the wake of the abroad success, Portugal has also been creating its own path in terms of Wine Tourism. Although Portuguese reputation as a destination with great food and wine, Wine Tourism has only start to be recognized by international travelers in recent years and there is still a long way to go. One of the mechanisms employed is the so-called “Wine Route” (Correia, Ascensão, & Charters, 2004). Since 1993, supported by the Dyonisios program of the European Union, the wine routes have been the main mechanism of the wine tourism practice in Portugal (Simões, 2008). Innovative tourist complexes have been emerging around the vineyards, covering hillsides and plains all around Portugal, from the Minho to Faro. This has enhanced the international demand, which already represents 50% of the total demand. Four main markets should be emphasized: Brazil, United Kingdom, France and Germany (Turismo de Portugal, 2015).

However, there are some constraints that should be mentioned. Regarding Wine Route’s internet activities, both in terms of websites and social media, the promotion is still limited and with lack of professionalism, followed by few views or followers. What is more, although wine tourism is considered an important tool to boost the wine company awareness and exposure, there is no clear consensus regarding its impact in the company’s revenue. Meaning, there is still margin to increase its revenue contribution for the overall company business (Turismo de Portugal, 2015).

From all this studies, there are some patterns that should be reinforced. The crucial role of wine tourism, more precisely the wine routes, as a wine promoter and region developer is a cross-border reality. The success of this growth mechanism is not only dependent on the wineries itself, but also on a range of industry stakeholders. From the government to local companies, there must be a complementary service to improve the international image and sales of wines. Also in the supply perspective, there has been a continuously adaptation to the changing demand and new destinations and products are constantly appearing in an effort to meet the gradually demanding tastes of tourists. Considering this, I will take a more narrow approach to understand how the Península de Setúbal wine route is contributing and can contribute for that purposes.

3. METHODOLOGY AND DATA COLLECTION

3.1 Research methodology

Regarding the research methodology, it should include a framework that allow to reach some evidence, according to a defined criteria and according to the research questions proposed (Bryman & Bell, 2015). Having that in mind, the three research questions were stated in the beginning and provide a guidance towards to the development of this case. Furthermore, taking into consideration the different types of research designs, I decided to choose the case-study format.

Over a long stretch of time, case study research have covered a great variety of subjects, from educational to clinical and biographical research, from consensus to controversial subjects (Bryman & Bell, 2015). But the reasons I have chosen this specific methodology go beyond that. Case study research is the appropriate for a contemporary phenomenon, with its own real-life context, which complies with this situation I am studying (Yin, 2011). Moreover, building theory from cases is recurrently considered as the “most interesting” research (Bartunek, Rynes, & Ireland, 2006). It is highly verifiable, which contrast with theory that is not built from direct evidence and usually have that type of limitation. In that sense, theory that is generated from case study is empirically robust. It reflects reality in a more accurate way, given the strong links with real data. (Sato, 2015)

The design of a case study involves different tasks. First, we should collect the data, than analyze it, present it and report the results (Yin, 2011). The reliability of a case study implies a detailed examination of a single case and, on a second step, an appraisal of the implications in terms of theoretical analysis. However, the big goal is not about finding if the results can be generalized to a wider universe, but how well the theory can be generated out of the findings. (Mitchell, 1983). Cases should be, therefore, used as the basis from which theory can be developed inductively (Eisenhardt & Graebner, 2007).

3.2. Data collection

In order to answer effectively the research questions, it is important that the data collection methodology is consistent with the research methodology. So, data collection

methods can be divided into two main steps:

First, the literature review. This analysis is not only suited to understand the originality and relevance of the study, but it also works as the framework and support for the development of the main topics, such as wine tourism and wine routes.

Furthermore, in this study, a two-stage methodological approach was used. On a first step, an exploratory/qualitative study has been conducted, in order to get some perceptions of specialists in the field about some general wine route topics. So, interviews were conducted with the purpose of getting some insights beyond the numbers. However, in order to better understand the mechanisms used to promote internationally the Portuguese wine, there is nothing more efficient than interviewing the promoters itself. So, on a second step, a Survey was sent to the 21 wineries that have joined the wine route of Península de Setúbal. This allows to stablish the bridge from rich qualitative evidence to mainstream deductive research, imperative in a case study (Eisenhardt & Graebner, 2007). Indeed, supporters of a new trend named “mixed methods designs” claim that this movement marks the beginning of a new era in research determined by a concern to combine quantitative and qualitative methods, which is pragmatically immune by old controversies. Although there still is a lack of common ground in this area, it is almost common sense that all methods have specific limitations as well as particular strengths. Therefore, qualitative and quantitative methods should be combined in order to compensate for their mutual and overlapping weaknesses. This dynamics can be easily explained. On one hand, results from qualitative interviews can help to identify unobserved patterns in quantitative data, as well as previously unknown features. On the other hand, quantitative study can be useful to authenticate findings from a qualitative study and to transfer these findings to a more analytical domain. Thus, qualitative and quantitative methods are able to accomplish different yet complementary purposes within mixed-method designs (Kelle, 2006).

Within this framework, this paper adds to the existing empirical literature by providing aspects of wine tourism development in southwest Portuguese region.

3.3 The Wine Route of Península de Setúbal

In Portugal, the wine routes project was born in 1993, as a result of the participation in a European Union Program, called Dyonisios. Dynamized essentially by the Comissões

Vitivinícolas Regionais (CVR) and the Portuguese tourism regions, most of the wine routes were born with a clear goal: to stimulate the touristic potential of each region. Each route combine a set of locations, wineries, companies and institutions with touristic interest, which are combined into a single infrastructure (Simões, 2008).

So, “What is the role of Península de Setúbal Wine route as a wine promoter?”

Located on the municipalities of Palmela, Setúbal, Montijo and Alcácer do Sal, the Península de Setúbal Wine Route was established as a private non-profit association that aims to promote wine tourism and boost the wine from Península de Setúbal. It is also dedicated to the promotion of enotouristic supply organization through the definition of activities and routes to visit the territory (as figure 1 shows), with the aim of organizing a distinctive tourism.

Many reasons are behind the decision of choosing this specific route as the center of my study. First, since this was an unstudied route in the literature review, it is more interesting to work on. Secondly, its remarkable growth and potential. In 2011, 23800 people visited the route, with an increase of 317 % when comparing with the year before, that contrast with 7500 people in 2005. The expectations is that it keep growing. In terms of sales, this means an increase from 54600 € in 2005 to 217700 € in 2012. (Albuquerque & Marcelino, 2012). Moreover, there are some distinctive factors of this route. The region has unique natural conditions with the proximity of Natural Park of Arrábida and Natural Reserve of Estuário do Sado to practice activities that combine visits to wine cellars. This are features and tools that can be used in the international promotion of the wines and that, at a certain way, replicate the unique landscapes, history and heritage that Portugal portraits.

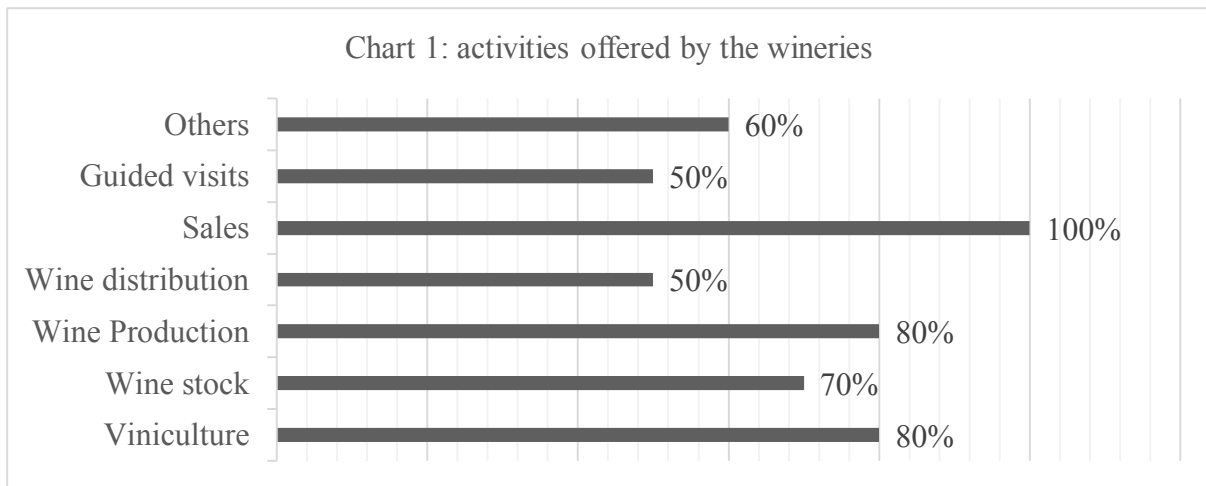
Taking this into account, I first interviewed Mrs Fátima Silva, marketing responsible of the Península de Setúbal Wine Route. Being the representative of the route, it was relevant to understand the organizational perspective of the route goals, as well as its strengths and limitations. I also interviewed Mrs Ana Filipa Lopes, Public Relations of Bacalhôa, Vinhos de Portugal, one of the most recognized wineries that belong to the route and also an internationally recognized wine producer. Last but not least, I also interviewed a tourism agency, who prefers to remain anonymous. It allowed me to understand the enotouristic offer that tourism agencies have, as well as their perception about the target group and selection criteria for wine tourists. The whole interviews can be seen in the appendix and allow me to take a broader view of the theme and combine different perspectives of entities involved in this kind of tourism.

On a second step, using Qualtrics as a resource, a survey was conducted and the respondents were the wineries that are associated with the wine route. This survey has four specific goals. First, to understand what type of activities are conducted inside the wineries, as well as the kind of activities tourist are able to practice there. Second, to identify the target group, what kind of tourists are interested in this type of tourism. Characteristics not only in terms of age, but nationality, appreciation of wine and the main reason why they choose to go there - the motivations behind that decision. Third, to study the purchasing pattern. Are visitors only interested in getting to know the region, the winery? Do they actually buy the wine? Regarding the main buyers, which are the preferential destinations? Last but probably the most important, the international context. How important are the foreign tourists? How was the first international contact established? What is the role of the route, both in attracting more tourists for this region and as a tool to boost exports for the correspondent wineries? Of a total of 22 wineries, I obtained the response of 12, which means 55 % of the respondents answered it. The survey disposition is in the appendix and the main results are the following.

4. RESULTS ANALYSIS

Wineries: economic activities involved

Starting with the type of activities that wineries perform in their facilities, chart 1 is representative of the results. All wineries sell directly their wines, 80% produce wines and 80% also allow visitors to be part of the process of cultivating the grapes for winemaking – Viniculture. 70% use their facilities for wine storage and 50% do distribution for their retail sellers. Besides that, it is also relevant to mention that other activities are performed, such as events, accommodation and guided trips, as well as enotourism activities, which 40% of the wineries have. Another aspect that should be noticed is that in 50% of the cases tourist have opportunity to have guided visits in the winery.



According to Mrs Fátima Silva, the most common activities visitors are looking for are the guided visits to the wineries, as well as the wine proves and the opportunity to taste local gastronomy. The tourism agency shares the same view, as it believes that the nuclear components for tourist's interest are the visit to wineries and wine proves. Since this activities are offered in 100% and 50% of the wineries, respectively, there seems to be a convergence between what wineries offer and what visitors are seeking for. The guided visits are less common in smaller wineries, essentially for logistic reasons.

However, other activities should not be undervalued. Not only local gastronomy, but local culture as a whole and its own specificities is also reinforced both by Mrs Fátima Silva and the travel agency as relevant strengths. Mrs Ana Filipa Lopes also adds that, in the specific case of Bacalhôa Vinhos de Portugal, tourists are not only wine lovers but also people interested in art and history. As mentioned in the literature review, (Scadden, 2000) defends that, when comparing the experiential aspects of lifestyle vis-à-vis the materialistic aspects, the first ones play a more important rule.

Wine tourists: main characteristics

Regarding their age, the majority of the tourists are between 40 and 50 years old, as table 1 illustrates.

Please rate on a scale of 1 to 5, being 1 the most frequent and 4 the least frequent, the age group of your visitors.

Age	Minimum	Maximum	Mean	Rank
Below 20	4.00	5.00	4.90	5°
Between 20-30	3.00	5.00	3.90	4°
Between 30-40	1.00	3.00	2.00	2°
Between 40-50	1.00	2.00	1.60	1°
More than 50	1.00	4.00	2.60	3°

Table 1: visitor's age group

Moreover, according to Mrs Fátima Silva, the average age is 43. As to social class, the target group belongs to middle/high class, which means it has considerable purchasing power. This is in accordance with the agency statements. It also mention that senior tourism (especially retired people) seems to be increasingly interested in this kind of product.

Concerning the visit motives, 90% of the wineries consider that the majority of their tourists are wine connoisseur's (chart 2, appendix). This is consistent with a study mentioned in the literature review that was conducted in Australia, which the conclusion was that a big portion of the tourists are wine lovers (Charters & Ali-Knight, 2000). Nevertheless, the main reason for visiting the route is leisure. In all wineries, business is the second biggest reason and some also consider that curiosity may be behind tourist's decision to get to know the wine route. (Table 2, appendix)

Surely connected with this results is the leading destination of the wines. In 80% of the wine sellers, own consumption of the tourists is the final destination of the wines. The second biggest destination is for resale in the national market and only afterwards for export purposes. Results can be seen in table 3.

Please rate on a scale of 1 to 3, being 1 the most frequent and 3 the least frequent, what is the leading destination of the wines bought on your wineries

	Mean	Rank
Own consumption	1,2	1 ^a
Resale in the national market	2	2°
Exports	2,8	3 ^a

Table 3: leading wine's destination

Another important feature that is important to mention about the visitors is that, according to Mrs Fátima Silva, mostly are households with 2 or more people, while individuals coming on its own represent only 16% of the total population. Taking that into account, it becomes clearer the results regarding the visiting motives. The fact that the leading reason for tourist to visit the route is leisure, this probably means that the normal pattern is coming in vacations, most likely with their households. Further evidence supporting this idea is the fact that, as Mrs Fátima Silva mentioned, on average, 16,7% of the people that visit the route consider that, when coming on vacations, their favorite type of tourism product is “Wine and Gastronomy”, followed by “Cultural and Landscaped Tourism” with 14,7%. This decision is only overcome by a 27,5 % preference over “Sun and Sea”. As Alan and Bruwer mentioned in their paper, when looking at the purpose of the trip, tourists usually see wine tourism as a part of a getaway of their daily routine (Alant & Bruwer, 2004).

Number of tourists

As table 4 illustrates, on average, on the high season (harvesting season), wineries receive 905 tourists per month. On the low season, this number reduces for 281 tourists. Yet, it is also important to underline that there is a significant difference between wineries. For instance, the biggest winery has an average of 4500 tourists in the high season and 1500 tourists in the low season, which contrast with an average of 50 and 20 tourists, respectively, on the smaller winery.

	Max	Min	Average
High season	4500	15	905
Low season	1500	1	250

Table 4: Number of visitors per month

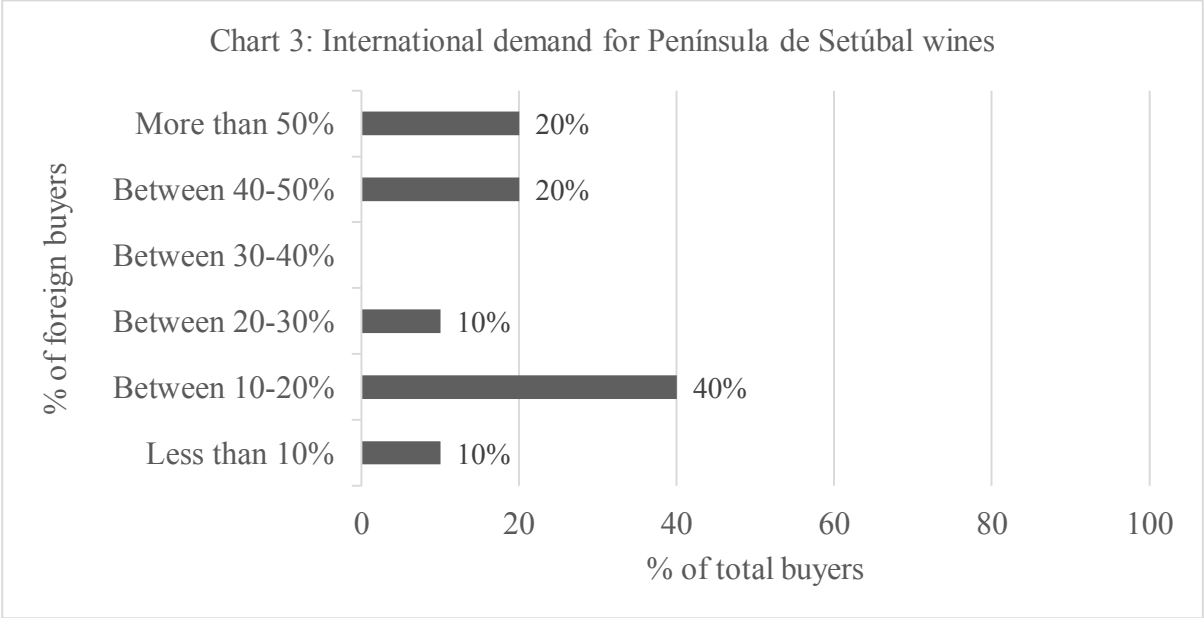
In order to explain this results discrepancy, two main motives should be highlighted. On one hand, the size of the winery. Relatively small wineries do not have the same capabilities, resources or even incentives to receive visitors and have activities in their facilities as the biggest ones have. On the other hand, the experience in wine tourism. Two of the survey respondents' mention that the relatively small importance of the wine route and the wine tourism in their business is timing related. Meaning, they have started recently to include this kind of activities in their facilities and the lack of experience hamper their ability to outperform,

at least in the short-run. From their own words, the promotion and recognition are features that “cannot be built overnight”.

International context: a demand/supply analysis

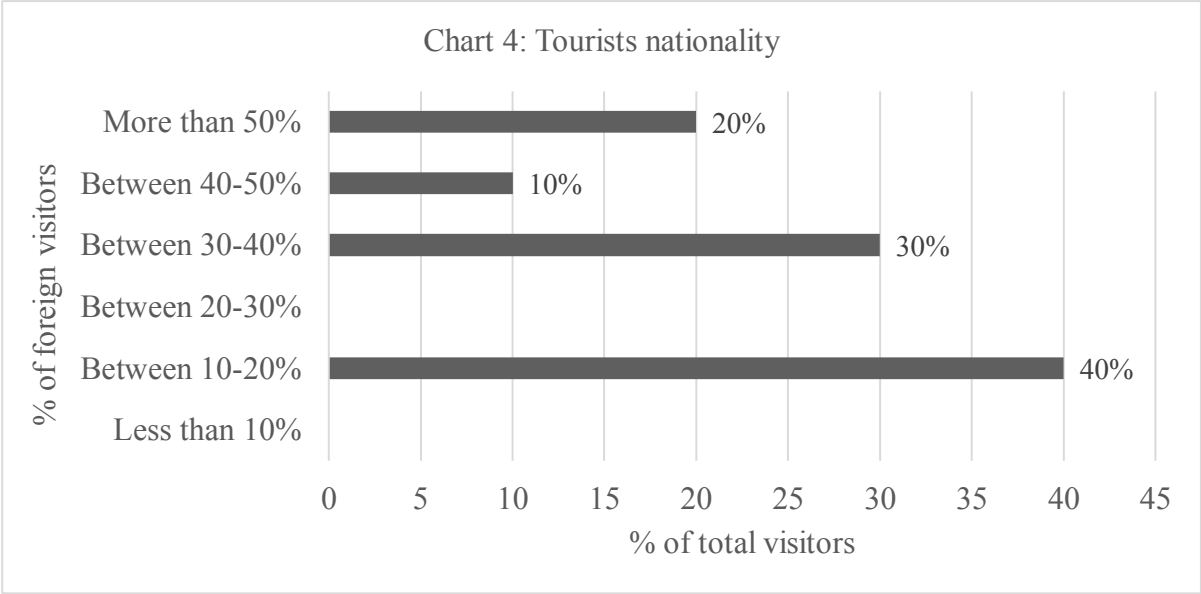
From the people that visit the winery, the percentage of visitors that actually buy the wine is around 70% (table 5, appendix). Also regarding the purchasing pattern, 40% of the wineries answered that between 10% and 20% of the buyers are foreigners. It is also relevant to point that 20% of the wineries acknowledge that the percentage of foreign buyers is between 40% and 50% and 20% of wineries remark that more than half of their buyers are foreigners, as it is illustrated in chart 3. Only in 10% of the wineries, the influence of foreign buyers is less significant (less than 10% of the total buyers). Regarding the biggest importers, the main nationalities are Brazil, Canada and Angola.

This shows the importance of international clients/ exports for this wineries, as in 40% of the cases, more than 40% of their sales derive from international trade.



In the same line of thinking, regarding the nationality of the visitors, 40% of the wineries claimed that between 10% to 20% of the tourists are foreigners and 30% said that between 30%

to 40% are foreigners. It should also be reinforced that more than half of tourists are foreigners in 20% of the wineries. This results are represented in chart 4.



Given the relative importance of foreign tourists, there are implications respecting the buyer’s nationality. In other words, this two variables are connected. It can be seen as a natural consequence that the contact established with the foreign clients was primarily established during the visits to the wineries. The second most important vehicle of contact is during international fairs and events outside their facilities and the third is through third parties. The less used way of contact is searching and stablishing contact to the costumers from wineries own initiative, as it is possible to identify in table 5.

From the foreign buyers you have, please rate on a scale of 1 to 4, being 1 the most frequent and 4 the least frequent, how did you established contact with them.

	Minimum	Maximum	Mean	Rank
During the visit to my facilities	1	3	1.3	1 ^o
During an international fair/ promotion event outside my facilities	1	3	2.1	2 ^a
Through third parties	2	4	2.9	3 ^a
Stablished contact from own initiative	2	4	3.7	4 ^a

Table 5: contact with the foreign clients

The second most frequent way of contact (during an international fair / promotional event outside my facilities) is connected with the fact that 90% of the wineries is taking part or, at least, had already participated in international promotion events (chart 5, appendix). Moreover, 70% of the wineries have their wines for sell in international retailers (chart 6, appendix), which is also representative of the gradually increasing international context they are involved.

As for online sale and promotion, all respondents advertise their business in social networks. Facebook is the more common, but other vehicles such as Instagram, twitter, LinkedIn, YouTube and trip advisor are also used. However, only 30% have an online sales platform (chart 7 and 8, appendix).

Wine Route: role and limitations

Noticing the importance of the international context for this wineries, it becomes crucial to understand the impact Península de Setúbal Wine Route has on that international visibility.

Starting with the international demand for the wine, 50% of the wineries believe that it has increased after joining the route. However, 40% reveal that it has remained the same and 10% of the agents do not have international exposure.

After joining the Península de Setúbal Wine Route, what happened to the wine’s international demand?

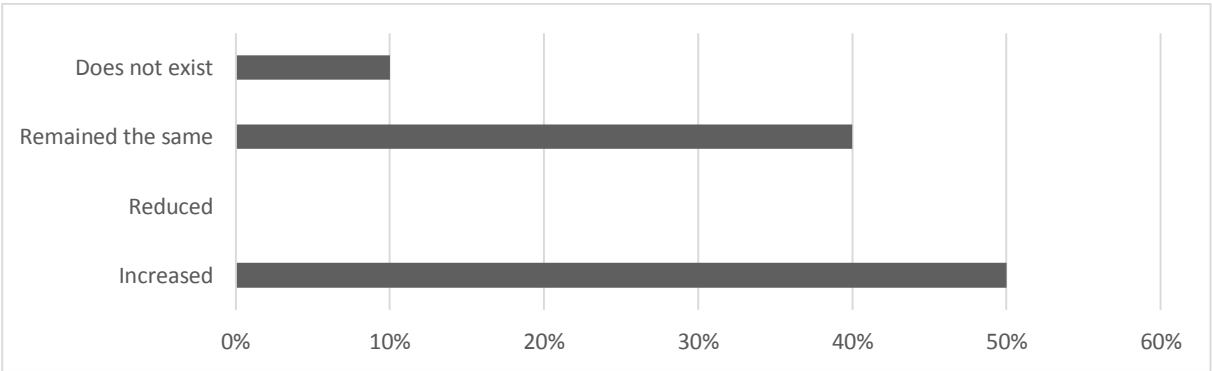


Chart 9: wine route impact

In the same line of thinking, 90% of the wineries agreed that the number of international tourists have increased and 80% said that the recognition at national level has also increased. However, in the international scene, the importance of the wine route is not that straightforward,

especially in the commercial aspect. As a matter of fact, 70% of the wineries said that they disagree that the route have had a direct impact in the increase of exports. Even in terms of the international recognition of their wines, 60% of the wineries also disagree that it had increased after joining the route, as table 6 highlights.

The impact of Península de Setúbal Wine Route in the wineries business

Belonging to the Península de Setúbal Wine Route (...)	Totally disagree	Disagree	Agree	Totally agree	Total (%)
Has increased the number of foreign tourists	10%	0%	60%	30%	100%
Has increased the exports value	50%	20%	20%	10%	100%
Has increased the recognition of my wines at a national level	10%	10%	80%	0%	100%
Has increased the recognition of my wines at an international level	30%	30%	30%	10%	100%

Table 6: international wine route impact

This results are in line with what Mrs Fátima Silva claims. Wine international promotion with effects on the wineries exports can be a results of the core strategy, but the main focus is the promotion of the region as a whole. Every entity is articulated in order to promote the enoturism, creating synergies that strength the region's tourism. So, increasing exports is relegated to second place. Although wine tourism and wine exports have the potential to become mutually reinforcing, as a study conducted in the Chilean market shows (Scadden, 2000), this relation is not working in this specific route and seems to be one of its biggest limitations. This is mainly because, as mentioned before, the business focus is in tourism and region promotion, which limits the commercial advantages for the wineries that a higher budget allocation for export purposes would bring.

Likewise, from Mrs Ana Filipa Lopes point of view, the fact that, in 70% of the wineries, belonging to the route does not have a direct impact on exports makes sense. This is because she states that there is no significant relationship between belonging to the route and the level of exports, as the international notoriety of the route is low. She also mention that in the specific case of Bacalhôa, the international promotion is essentially provided with the support of ViniPortugal, Comissões Vitícolas or through importers from the countries were the events occur. The role of not only Península de Setúbal Wine route but all Portuguese routes in general

is more relevant at national level. Since their presence is limited to national fairs, the kind of publicity they generate is also typically limited to the national boundaries.

The travel agency remarks the good growth expectations regarding this distinctive tourism, giving special emphasis to the Portuguese “brand” value worldwide. Gastronomy, historical culture and wine are assets that Portugal enjoys, especially wine given the increasing number of premiums and recognitions that it has been facing on international competitions. However, there are some limitations. The travel agency believes that the biggest challenge the wine routes have to face is at the communication level. It is capital to be more participative in professional events, not only in Portugal but also abroad. That can allow a broader and more efficient publicity, which is a crucial tool to promote the route and attract investors. Besides that, he also recommends a higher proximity between the wine route and the travel agencies, with initiatives like investing in instruction for tourism agencies professionals (such as wine tasting courses).

Wine Route: Critical success factors

The consensus view seems to be that the region promotion is the core focus of the route. Mrs Ana Filipa Lopes identifies it as the route biggest asset, as well as the regional characteristics: the “terroir”, the grapes and the wine identity. Moreover, one of the biggest strengths of this route at Mrs Fátima Silva eyes is the association of Península de Setúbal wines with the regional products and gastronomy. Moscatel de Setúbal, Azeitão cheese, sheep butter are just some unique examples of what fulfils visitors expectations. This alliance between wine and food is also mentioned in the literature review as one of the wine tourist’s main desires (Tomás, Sánchez-Cañizares, & García, 2010)

However, the combination of wine and gastronomy are not the only leverage of this route. Mrs Fátima Silva also draws attention to the supplementary activities, such as showcookings, wine theatre, horse riding and hiking in the vineyards, concerts, within others. All this activities give a wide range of opportunities for tourists with different preferences, turning this into a multi-dimensional kind of experience where all five senses are meant to be fulfilled. Therefore, this cooperation among different suppliers provide a wide range of cultural and outdoor attractions, considered by (Getz & Brown, 2006) as one of the most vital success factors.

Lastly, it should be mentioned the cooperation among different entities. Mrs Filipa Silva outlines the wine region of Península de Setúbal as a whole. Not only all counties where the route is geographically present are involved, but also all tourism promoters, from Lisbon to Alentejo, as well as CVPR (Comissão Vitivinícola da Península de Setúbal) are unified with a common goal. One more time, this is in accordance with what authors consider to be the most relevant success factors. As (Telfer, 1999) believes, the success of a wine route is highly dependent on the cooperation between service providers through the region.

5. CONCLUSION

Coming back to the research questions, it is now possible to address them in a conclusive way.

Starting with the main characteristics of Wine Tourism in an international context, there seems to be a uniform view that it is a combination of different factors, not only wine related, that satisfy the gradually increasing demands from the visitors. The entities responsible for the Península de Setúbal wine route are conscious of this reality and have been adapting during the years, creating and implementing supplementary activities to the wine taste and visit to the wineries that aim to provide a full experience to the visitors. The “wine tourism supply chain”, as mentioned in the literature review, seems to be well coordinated given the diversity of services provided.

Regarding the tools used to promote the Portuguese wine internationally, the wine routes role seems to be less relevant than expected. Its efficiency is more significant at a national level, since its international recognition is limited. Mrs Ana Filipa Lopes says that there is a big discrepancy between ViniPortugal (with a much higher impact abroad) and the wines routes. This gap can be explained by the better resources and tools ViniPortugal has, especially in terms of budget used for international events abroad. Described by literature as one of the critical success factors, events, international fairs and other communication activities should be better managed by the wine route organization, given the relevance of marketing activities for this business.

So, what is the role of the Península de Setúbal wine Route as a wine promoter? It is clear now that the route main focus is the promotion of the region. As mentioned before, the promotion of the wine is a natural consequence, especially for smaller wineries. So, it is now

clear that there still is undue potential that the responsible entities should work on. As literature review as shown, wine exports and tourism are mutually reinforcing, it is only a matter of better allocation of resources.

5.1 Recommendations

The lack of human and technical resources make Península de Setúbal wine route be far short when comparing with well-known international routes, with more activities and initiatives. However, the increase in the number of visitors and sales, right from the start, is a sign that the route is in the right path. It is very relevant to highlight that more investment should be made in order to unleash the full potential of both the distinctive tourism and distinctive wine that this route has to offer.

In order to improve the wine route, it is also relevant to understand what wineries can do. For instance, only 30% of the wineries have online sales, an imperative tool for both national and international sales. Having a well-structured site, where visitors can buy the wines and get to know more about the winery history, values and heritage (with a Multilanguage offer) is something that the most recognized wineries do and should be a short-run goal for the remaining ones.

Another recommendation is based on the wine route's marketing communication mix. As mentioned before, the experience provided is one of the main assets the route has to offer but the way it is advertised still leaves a great deal to be desired. Investment should be made in order to increase the presence in international fairs but developments should also take place in terms of social media and social network. Nowadays, it is not enough to have a website for the business. The digital storefront and the interactive marketing extends to social media marketing sites like Facebook and YouTube, trends that Península de Setúbal wine route should capitalize. E-commerce could be another tool used to extend and reinforce relations between tourists (future potential customers) and wine firms, taking into account the need to enhance all business levels in terms of quality standards.

What is more relevant to emphasize is that all the route stakeholders should be involved and committed to lead Península de Setúbal Wine Route to the leading wine route destinations, both as a region and wine promoter.

5.2 Limitations

One of the main limitations is the sampled used for this study. Given the reduced number of wineries that belong to the Península de Setúbal wine route, as well as the not so high response rate, there might be some bias that a bigger sample and a better response rate would minimize.

Secondly, the lack of benchmarking. In order to understand the opportunities and limitations of wine routes as an international promoter, it would be important to take a broader view and make a benchmarking with worldwide references in this area. This is because the critical success factors for the wine tourism development differ among countries. For instance, in the Western Australia, the quality of the wines and the wine country appeal are the biggest strengths that they try to preserve and reinforce (Getz, Dowling, Carlsen, & Anderson, 1999). In Canada, regional tourism promotion with wine festivals and events are crucial (Getz & Brown, Critical success factors for wine tourism regions: a demand analysis, 2006). However, the same authors state that the lack of a uniform success criteria among regions should not jeopardize an opportunity to get a set of measures and indicators that allow the application of a singular methodology, which should encourage the benchmarking among wine tourism destinations. For further research, this could be something relevant to add to the existing literature, that I did not have neither the time nor the resources to work on.

Lastly, since the surveys were carried out only in a specific region, there is an acceptable doubt if these results can be extended to other Portuguese wine areas: especially for wine routes with a very peculiar kind of wine, like the Port Wine route and Vinho Verde Wine Route.

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7. APPENDIX

7.1 Appendix 1: Península de Setúbal wine trails



7.2 Appendix 2: Interviews with wine tourism stakeholders

1. Considera que a(s) rota(s) dos vinhos têm um papel fundamental para a visibilidade do vinho português internacionalmente?

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): Não considero que as Rotas do Vinho tenham um papel fundamental na promoção do vinho no estrangeiro. No caso da Bacalhôa, as promoções internacionais são maioritariamente feitas com o apoio da ViniPortugal, das Comissões Vitivinícolas ou por importadores existentes no país onde os eventos ocorrem. As rotas dos vinhos têm uma relevância muito maior a nível nacional do que propriamente a nível internacional pois surgem em feiras nacionais e a publicidade é feita muito mais internamente.

Fátima Silva (Rota dos Vinhos da Península de Setúbal): O principal objetivo da Rota de Vinhos da Península de Setúbal é a promoção da região como um todo onde as adegas e demais elementos víquicos são “articulados” para desenvolvimento do enoturismo, não estando a promoção externa dos vinhos e a internacionalização dos vinhos no centro da nossa atividade.

1.1 No caso específico da rota dos vinhos da Península de Setúbal.

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): No que diz respeito à rota dos vinhos da Península de Setúbal, a sua atividade destina-se maioritariamente aos consumidores e turistas que visitam Portugal e a região em si do que propriamente eventos internacionais.

2. Quais os pontos fortes e/ou fracos da(s) Rota(s) dos Vinhos na promoção do vinho português para o estrangeiro.

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): Pontos fortes: a divulgação da região e das suas características regionais: o *terroir*, castas, perfil do vinho. O maior ponto fraco é o facto de não haver atividade suficiente e notoriedade internacional. São pequenas organizações com poucos recursos para a divulgação internacional.

Fátima Silva (Rota dos Vinhos da Península de Setúbal): A associação dos vinhos da Península de Setúbal com os produtos regionais é uma mais-valia, existindo infinitas combinações que vão ao encontro das expectativas dos clientes e visitantes. Dos vinhos tintos aos espumantes, dos Moscatéis de Setúbal às aguardentes e licores... O singular queijo de Azeitão, a manteiga de ovelha, as conservas... As compotas e chutneys de paladares singulares, os bombons, o mel, o azeite e a variedade de doçaria regional... do pastel de Moscatel de Setúbal à queijada do Anjo, passando pelas fogaças de Palmela ou esses de Azeitão...

Assim sendo, como fatores de diferenciação face às outras rotas, podemos referir o Moscatel de Setúbal é o vinho mais emblemático da região, sendo um distinto representante dos D.O. Setúbal. A casta branca Moscatel de Setúbal é a base do prestigiado vinho generoso com o mesmo nome. De excelente qualidade, é caracterizado pelo peculiar sabor e aroma inconfundível.

Os Moscatéis Roxos de Setúbal são também um generoso de qualidade diferenciada e produção mais limitada, é um vinho de complexidade aromática, que apresenta a principal diferença face ao Moscatel de Setúbal na sua casta rosada.

3. Comparativamente a outras rotas internacionais, acha que as portuguesas se encontram no mesmo patamar?

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): as rotas portuguesas ficam aquém comparativamente a outras rotas internacionais mais conhecidas. A falta de recursos técnicos e humanos leva invariavelmente a um cenário de menos atividades e iniciativas.

4. Quais os principais fatores diferenciadores das rotas nacionais mais reconhecidas, tais como a Rota dos Vinhos do Porto ou do Vinho Verde?

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): No meu entender, a principal diferença destas rotas mais específicas é o facto do tipo de vinho a que se dedicam ser único e diferenciador no mundo inteiro. Tanto o vinho do Porto como o Vinho Verde só se produzem em Portugal.

5. O que pode ser feito para potenciar as rotas dos vinhos da Península de Setúbal e a sua visibilidade fora de Portugal?

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): Há uma ligação umbilical das Rotas às Comissões Vitivinícolas. Mesmo estas possuem poucos recursos humanos e técnicos para apoiar na divulgação dos vinhos portugueses. Há uma grande disparidade entre a ViniPortugal e as Rotas dos Vinhos em que a ViniPortugal possui muito mais recursos e meios para a promoção. O orçamento para eventos lá fora da ViniPortugal é muito superior aos das Rotas dos Vinhos. Falta fundo de maneio às Rotas.

Agência de Turismo: No que diz respeito à evolução do Enoturismo no negócio da Agência, tem tendência a crescer, apesar de representar ainda muito pouco no negócio das Agências. A expectativa de crescimento advém do facto de cada vez mais se dar valor ao que é português, em termos de gastronomia, cultura histórica e vinho. A valorização do vinho português no estrangeiro, de marcas (ex.: Periquita no Brasil) e prémios/referências de jornalistas são fatores também apontados para essa expectativa de crescimento.

No entanto, há que melhorar em termos de comunicação. Para isso, é necessário uma maior participação em eventos profissionais, como feiras em Portugal e no Estrangeiro. Criar maior proximidade com as Agências de uma forma em geral, mas também com as mais pequenas. Além disso, a formação aos profissionais de turismo das Agências (inclusive provas / cursos de degustação) e uma maior e melhor publicidade, para promover a Rota ao público em geral.

6. Considera haver alguma correlação positiva entre as exportações de vinho e a aderência às rotas?

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): não há relação significativa, pois a notoriedade internacional destas rotas é muito baixa.

7. Quais os tipos de turistas que mais procuram estas rotas? Acha que as rotas do vinho são mais direcionadas para o público nacional ou estrangeiro?

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): Pela realidade da Bacalhôa, o tipo de turista internacional que mais procura estas rotas são os conhecedores dos vinhos por estes serem já comercializados no seu país. No caso dos estrangeiros, os brasileiros representam uma “grande fatia do bolo”. Da minha experiência, considero que as rotas estão mais direcionadas para o público nacional.

Fátima Silva (Rota dos Vinhos da Península de Setúbal): De acordo com um estudo realizado pelo Instituto Politécnico de Setúbal, feito em 2012, é possível concluir que os visitantes da Rota de Vinhos da Península de Setúbal são, na sua maioria, casais portugueses, dos distritos de Setúbal e Lisboa, com mais de 25 anos e com formação superior, trabalhadores por conta de outrem, a tempo inteiro, e de classe média. No entanto, há a realçar os seguintes segmentos: Visitantes com mais de 55 anos;

Reformados;

Agregados familiares com 4 ou mais elementos (verificam-se várias dimensões de agregados familiares na amostra, embora se destaque o agregado familiar composto por 2 pessoas (37,2%), sendo que o agregado familiar menos representativo é o individual (16%). Um destaque especial para os agregados familiares com 4 ou mais pessoas, com 26,5% da amostra);

Estrangeiros, essencialmente do Brasil e E.U.A.

Agência de Turismo: As idades destes clientes são, na maioria, superiores aos 40 anos (começando nos 35 anos e até aos 80 anos). O turismo sénior (em particular reformados) parece estar cada vez mais interessado neste tipo de produto. Pertencem a classes sociais médias e médias altas e apresentam variadas profissões, pelo que possuem algum poder de compra e interesse/gosto pelo vinho.

8. Dada a diversidade de experiências que este tipo de turismo oferece, pode-se dizer que o público-alvo são os “wine connoisseur” / “wine enthusiast” ou tem um público-alvo mais amplo?

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): Felizmente no nosso temos vários tipos de público, dependendo do espaço de Enoturismo a que nos referimos. Nos 5 espaços de Enoturismo que possuímos (Museu Bacalhôa, Palácio da Bacalhôa, Bacalhôa Buddha Eden,

Quinta do Carmo e Aliança Underground Museum) recebemos muitas visitas de “winelovers” mas também de pessoas interessadas em arte e história. Graças ao acervo particular do Comendador José Berardo (principal acionista do grupo Bacalhôa) e ao facto de alguns destes espaços terem séculos de história para contar, disponibilizamos em todos os espaços de Enoturismo várias peças de arte que fascinam e atraem outro tipo de público que não é necessariamente “winelover”.

Fátima Silva (Rota dos Vinhos da Península de Setúbal): Existem uma série de experiências enoturísticas que são anualmente proporcionadas aos nossos visitantes. Este ano foram realizadas 52 atividades e, para além das “normais” e sempre agradáveis, visitas guiadas nas adegas, que registam um aumento contínuo ao longo dos anos, estas atividades organizadas são sempre complementadas com as provas de vinhos e de produtos regionais. De cursos de iniciação à prova de vinhos a provas comentadas de vinhos, várias são as propostas de atividades e para todos os gostos: Showcookings de Compotas, Moscatéis à prova, Vinhos e Tibornas, Adegas no Teatro, Jantares Vínicos, Pic-nic de Santo António, Sopa Caramela na Adega, Passeio a Cavalos nas Vinhas, Caminhada “Por Terras de Jardins de Vinhas”, Circuitos Enoturísticos, Adegas de Portas Abertas, Pisa a Pé na Adega, Vindimas, Adiafa, S. Martinho e Concertos nas Adegas Sons do Vinho.

É ainda relevante referir que, de acordo com o estudo feito em 2012, o tipo de produto turístico, que mais vezes foi mencionado como sendo o que se procura com mais frequência, foi o produto Sol e Mar com 27,5% das respostas. No entanto, e uma vez que os inquiridos se encontravam numa Rota de Vinhos, é sem surpresa que o 2.º tipo de produto mencionado com mais frequência seja o Gastronomia e Vinhos (16,5%). O Turismo Cultural e Paisagístico apresenta também uma percentagem significativa com 14,6%

Agência de Turismo: Para os visitantes, são componentes nucleares da oferta de Enoturismo a prova de vinhos e a visita à adega. No entanto, outras componentes são ocasionalmente referenciadas como a preocupação com a oferta de alojamento, o lazer, o aspeto cultural da região, os locais de interesse, a experiência com o vinho e a gastronomia. A nível de provas de vinhos, com produtos regionais e da gastronomia local de Setúbal, foram mencionados o queijo de Azeitão e o peixe assado.

9. Considera que existe algum tipo de limitação a nível regulamentar ou organizacional nestas rotas que sejam entraves à maior promoção e exportação de vinho destas regiões?

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): No meu entender, essa função está mais sob o pelouro da ViniPortugal do que propriamente nas Rotas de Vinho.

10. Qual o papel da marca “Wines of Portugal” nessa promoção?

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): Faz cada vez mais sentido promover a marca Portugal. O nosso país está na moda. Todos os dias vemos notícias em publicações estrangeiras a elogiar o nosso país, as nossas gentes. Talvez falte um pouco mais de corporativismo entre os produtores nacionais para que a marca “Wines of Portugal” se torne mais reconhecida, mais atraente além-fronteiras.

11. Na sua opinião, quais são as entidades governativas que mais contribuem para o desenvolvimento do turismo nestas regiões? (comissão europeia, associações de turismo nacionais, regionais, associações vinícolas).

Ana Filipa Lopes (Bacalhôa, Vinhos de Portugal): As entidades que mais contribuem para o desenvolvimento e promoção do turismo nestas regiões são (por ordem) o Turismo de Portugal, o Turismo regional- no caso da Bacalhôa/ Aliança são o Turismo do Centro e Lisboa e Turismo do Alentejo porque gerem as regiões onde temos as nossas unidades de Enoturismo. As agências de viagem e Operadoras Turísticas também têm um papel importante na promoção da região. Por último, as empresas que vendem pacotes de atividades em que incluem visitas às adegas e instalações da Bacalhôa, e não esquecer também as unidades hoteleiras.

Fátima Silva (Rota dos Vinhos da Península de Setúbal): Em termos de entidades, a região vitivinícola da Península de setúbal funciona como um todo, tanto os municípios envolvidos na rota, como entidades regional de turismo da região de lisboa, agências de promoção turística de lisboa e Alentejo, cvrps estão unidas em prol do desenvolvimento do enoturismo. De referir a Associação das Rotas de Vinhos de Portugal que pretende ser uma plataforma de difusão das várias oferta enoturística do País.

7.3 Appendix 3: Survey for the Wineries

Survey

Q1 Caro Participante, este questionário foi criado no âmbito de uma tese de mestrado na Universidade Católica Portuguesa. O seu objetivo é estudar o impacto das Rotas dos Vinhos da Península de Setúbal na promoção internacional e exportação do vinho Português. Todas as respostas registadas são anónimas e confidenciais e serão utilizadas unicamente para propósitos académicos. Agradeço, antes de mais, a sua participação. O preenchimento deste questionário não deverá demorar mais que 5/10 minutos.

Q2 Faz parte do grupo de aderentes da Rota dos Vinhos da Península de Setúbal?

- Sim (1)
- Não (2)

Q3 Que atividades são desenvolvidas nas suas instalações?

- Vinicultura (1)
- Armazenagem (2)
- Produção de vinhos (3)
- Distribuição (4)
- Venda Direta (5)
- Outras (6) _____

Q4 Que atividades oferece, nas suas instalações, aos turistas?

- Visitas guiadas (1)
- Venda de Vinhos (2)
- Venda de Souvenirs (3)
- Participação nas Vindimas (4)
- Outras (5) _____
- Não recebemos turistas nas instalações (6)

Q5 Ordene numa escala de 1 a 5, sendo 1 o mais frequente e 5 o menos frequente, qual a faixa etária dos visitantes que recebe.

- _____ Abaixo de 20 anos (1)
- _____ Entre 20 A 30 anos (2)
- _____ Entre 30 A 40 anos (3)
- _____ Entre 40 A 50 anos (4)
- _____ Acima de 50 anos (5)

Q6 Diria que a maioria dos visitantes é apreciador de vinhos?

- Sim (1)
- Não (2)

Q7 Indique, do mais para o menos frequente, qual o motivo da visita.

- _____ Lazer (1)
- _____ Negócios (2)
- _____ Outro (3)

Q8 Indique, do mais para o menos frequente, qual o destino dos vinhos comprados nas suas instalações.

- _____ Consumo próprio (1)
- _____ Revenda em território nacional (2)
- _____ Exportação (3)
- _____ Outro (4)

Q9 Participa ou já participou em eventos de promoção internacional?

- Sim (1) _____
- Não (2)

Q10 Em média, quantos visitantes recebe por mês durante a época de maior afluência?

Q11 Em média, quantos visitantes recebe por mês durante a época de menor afluência?

Q12 Das pessoas que visitam as suas instalações, qual a percentagem que representa clientes estrangeiros?

- Menos de 10% dos meus visitantes são estrangeiros (1)
- Entre 10% e 20% dos meus visitantes são estrangeiros (2)
- Entre 20% e 30% dos meus visitantes são estrangeiros (3)
- Entre 30% e 40% dos meus visitantes são estrangeiros (4)
- Entre 40% e 50% dos meus visitantes são estrangeiros (5)
- Mais de metade dos meus visitantes são estrangeiros (6)

Q13 Das pessoas que visitam as suas instalações, qual a percentagem que representa aquelas que também compram vinhos?

- _____ Compram (1)
_____ Não compram (2)

Q14 Dos compradores regulares que tem atualmente, indique qual a percentagem de estrangeiros comparativamente ao total de compradores que possui:

- Menos de 10% dos compradores são estrangeiros (1)
- Entre 10% e 20% dos meus compradores são estrangeiros (2)
- Entre 20% e 30% dos meus compradores são estrangeiros (3)
- Entre 30% e 40% dos meus compradores são estrangeiros (4)
- Entre 40% e 50% dos meus compradores são estrangeiros (5)
- Mais de metade dos meus compradores são estrangeiros (6)

Q15 Dos compradores estrangeiros, indique, do mais para o menos frequente, como estabeleceu contacto com os mesmos:

- _____ Durante a visita às minhas instalações (1)
_____ Através de terceiros (2)
_____ Durante uma feira / evento promocional fora das minhas instituições (3)
_____ Procurei e estabeleci contacto por iniciativa própria (4)
_____ Outro (5)

Q16 Após a adesão à Rota dos Vinhos da Península de Setúbal, a procura internacional do vinho:

- Aumentou (1)
- Diminuiu (2)
- Manteve-se (3)
- Não existe (4)

Q17 Possui uma página nas redes sociais?

- Sim. Se sim, qual ou quais? (1) _____
- Não (2)

Q18 Possui plataforma de vendas online?

- Sim (1)
- Não (2)

Q19 Tem o seu vinho à venda em retalhistas internacionais?

- Sim. Se sim, quais? (1) _____
- Não (2)

Q20 Indique os 3 maiores compradores internacionais que possui

- (Nome, País) (1)
- (Nome, País) (2)
- (Nome, País) (3)

Q21 Diga o quanto concorda ou discorda das seguintes afirmações:

	Discordo completamente (1)	Discordo parcialmente (2)	Concordo parcialmente (3)	Concordo completamente (4)
Após a adesão à rota dos Vinhos, verificou-se um aumento do número de turistas estrangeiros (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Após a adesão à rota dos Vinhos, verificou-se um aumento do valor das exportações (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Após a adesão à Rota dos Vinhos, o reconhecimento do vinho a nível nacional aumentou (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Após a adesão à Rota dos Vinhos, o reconhecimento do vinho a nível internacional aumentou (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

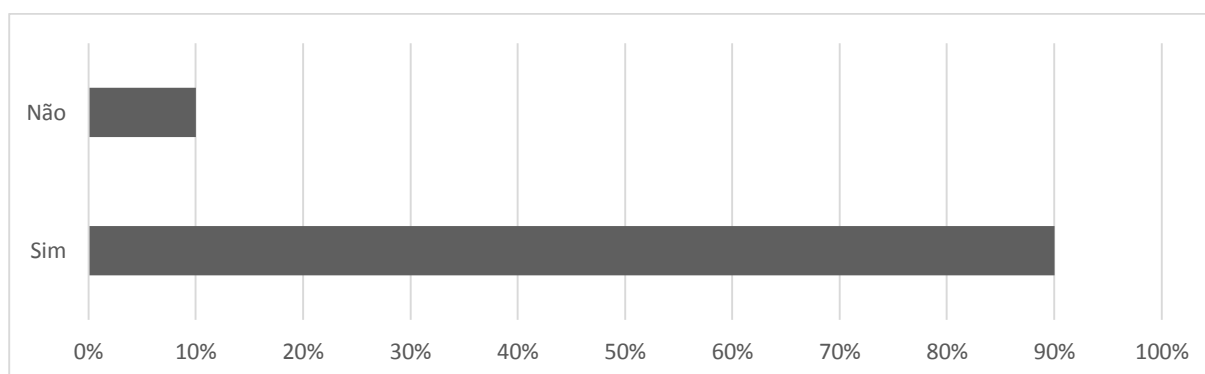
Q22 Qual o nome da Organização?

Q23 Se tiver algum comentário ou informação relevante para o estudo, agradeço que o efetue no espaço em branco.

7.4 Charts and Tables

7.4.1 Chart 2: Percentage of wine connoisseurs

Would you say that the majority of your visitors are wine connoisseurs?



7.4.2 Table 2: Motivations for visiting the route

Please rate on a scale of 1 to 3, being 1 the most frequent and 3 the least frequent, what is the motive behind tourist visit

Motive	Minimum	Maximum	Mean	Rank
Leisure	1	1	1	1º
Business	2	2	2	2º
Other	3	3	3	3º

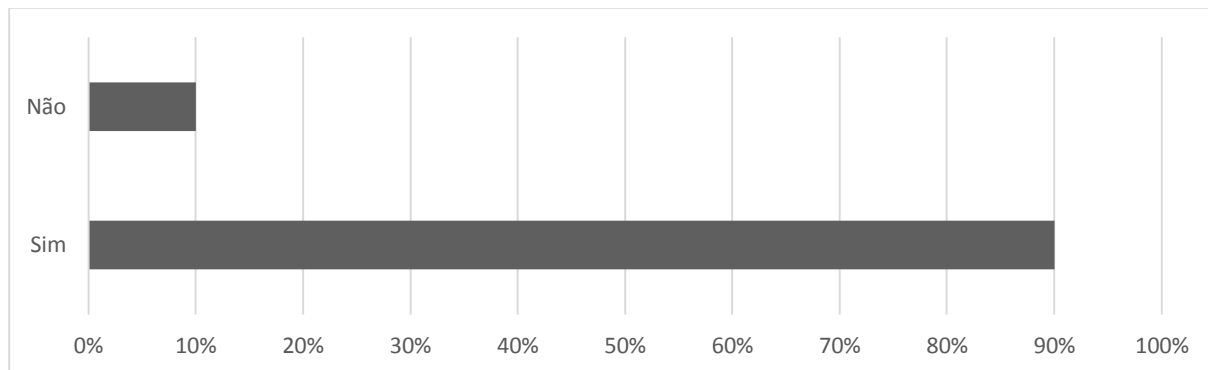
7.4.3 Table 5: Percentage of wine buyers

From the people that visit your wineries, what is the percentage that actually buy your wines?

Visitors	Minimum	Maximum	Mean
Buy wine	25%	90%	70%
Do not buy wine	10%	75%	30%

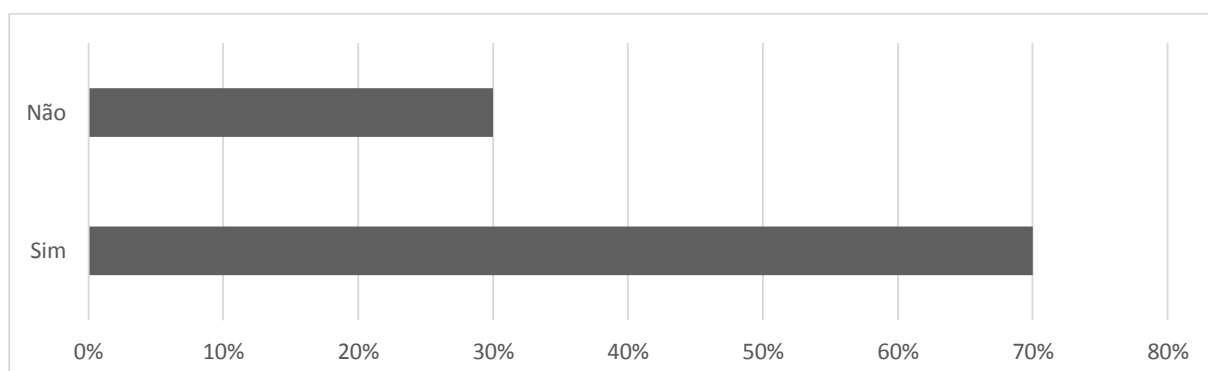
7.4.4 Chart 5: International Promotion events

Are you taking part or have you already participated in international promotion events?



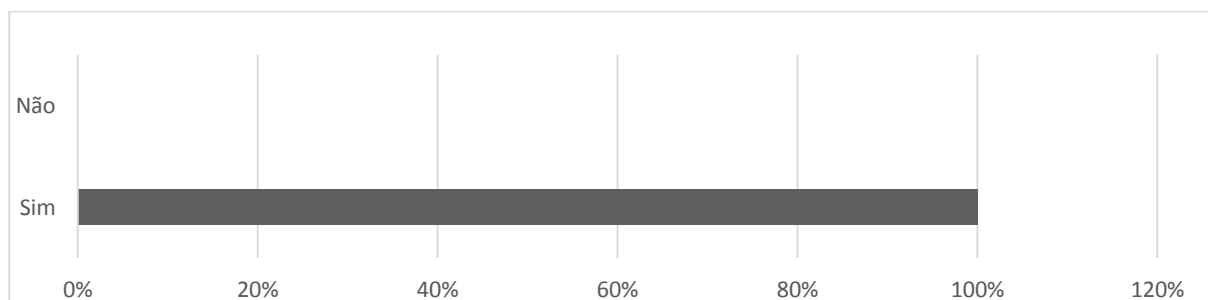
7.4.5 Chart 6: International Retailers

Do you have your wine for sale in international retailers?



7.4.6 Chart 7: Social Network

Do you have a social network page?



7.4.7 Chart 8: Online sales platform

Do you have an online sales platform?

