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Emergence and evolution of e-commerce among Portuguese wine manufacturers: a multiple case study

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Abstract

This thesis aims to explore the emergence and evolution of e-commerce among Portuguese wine manufacturers. This study initially reviews the literature on the topic of evolution of e-commerce in the wine industry. Next, building upon findings based on interviews with wine producers with e-commerce, and after conducting multiple semi-structured interviews with e-commerce managers, it was found that the COVID-19 pandemic was the main driving force behind the adoption of e-commerce by wine producers. Interestingly, wine producers mostly share strategic approaches and similar views regarding e-commerce. Moreover, despite the residual performance, almost all companies plan to continue investing in e-commerce and in its potential while keeping up with emerging trends. The findings of this study could assist wine producers in gaining a better understanding of their operating environment and identifying areas for future investment.

Keywords: wine, e-commerce, online channels, covid-19, m-commerce

Number of words: 7892

Resumo

Este trabalho final de mestrado tem como objetivo explorar o aparecimento e evolução do e-commerce entre os produtores de vinho portugueses. Este estudo inicialmente revisa a literatura sobre o tema da evolução do e-commerce na indústria do vitivinícola. Em seguida, com base nas descobertas de um estudo de caso múltiplo de cinco empresas, produtores de vinho com e-commerce, e após a realização de várias entrevistas semiestruturadas com gestores responsáveis pelo e-commerce, constatou-se que a pandemia do COVID-19 foi a principal força motriz por trás da adoção do e-commerce pelos produtores de vinho. Os produtores, na sua maioria, compartilham opiniões semelhantes e aplicam estratégias idênticas nos mesmos canais.

Ainda que com uma performance residual, quase todas as empresas pretendem continuar a investir no e-commerce e nas suas potencialidades, acompanhando as tendências que têm vindo a surgir. As conclusões deste estudo podem ajudar os produtores de vinho a obter uma melhor compreensão do seu ambiente operacional e a identificar áreas para futuros investimentos.

Palavras-chave: vinho, e-commerce, canais online, covid-19, m-commerce

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Introduction

Studies reveal that the wine market is expected to grow significantly from 2021 to 2028 (Grand View Research, n.d.), and the major forces driving this evolution are possibly economic growth and wider competition (Ohana-Levi & Netzer, 2023). As a result, consumers are being presented with wide range of wine varieties and a considerable number of brands.

The scenario in the viticulture world is increasingly challenging and crowded, these conditions make the commitment to new strategies and the development of new means to reach its target consumers extremely important. It is urgent that wine brands manage to differentiate themselves. The emergence of e-commerce boosted and opened doors to new ways for wine brands to be closer to their consumers. For example, Aswani (2022) argues that online retail was a success in the covid era, especially within the “alcohol space”, as “e-commerce remains the one major silver lining for the wine category”.

The Portuguese market for wine accounted with 817.252.851€ in sales between January and September of 2022 (IVV, 2022). Portugal was considered the 8th global exporter of wine in 2021 (Canway, 2022), having exported over 9453 million euros of wine in 2022 (IVV, 2022). OIV(2020), an International Organisation of Vine and Wine announced in 2020 that Portugal is the country with the highest per capita consumption of wine in the world, representing a consumption of 51.9 liters of wine per year per Portuguese over 15 years old. With such great numbers and involvement in the wine sphere, Portugal also began to give its first steps in e-commerce. Santos et al. (2022) proves that

companies in the wine sector have been exploring the online channel. With the Covid-19 pandemic, several Portuguese wine brands managed to take advantage of the online sales opportunity, normalizing the practice of buying wine through this channel.

As wine itself is seen as a product with a unique and complex nature that has always been showing different patterns in consumer behavior (Lockshin, 2003) it is more than enough reason to be the target of the most varied studies. That said, there are many efforts in the literature dedicated to online wine purchasing (articles focused on online purchasing behaviour, including segmentation, or barriers to purchasing online) (Lockshin & Corsi, 2012). However, there is a considerable gap regarding Portuguese wine e-commerce. Thus, the research problem that drives the efforts of this dissertation is to explore: How has e-commerce emerged and evolved among Portuguese wine manufacturers?

To achieve answers to the previous matter and attain the study's research objective, a multiple case study will be performed. The research question will be explored by adopting a qualitative approach. Using purposeful sampling, five cases of wine companies located in Portugal were analysed. Collaborators involved in e-commerce activities were interviewed, while secondary sources were used to triangulate results.

Portuguese wine producers invested in this branch after the outbreak of covid-19. The different managers, although with different opinions, coincide in most of the subjects and therefore act mostly in agreement. They rely on the same channels and knowledge, acting according to the same e-commerce strategies. The still residual performance can be observed, however the positive and importance that e-commerce has is recognized.

This study contributes to the emergence and evolution of Portuguese wine e-commerce topic in the following line: by analyzing the multiple case of well-established wine producing companies.

The remaining of the thesis is organized as follows: First, a review of relevant theories and topics related to wine and e-commerce, will be presented in the following section. Secondly, a summarize of the pertinent data gathered from interviews and observations from managers of different wine producing companies will be presented. Finally, the collected information will be analyzed, compared, and put in contrast with the knowledges shared during the interviews, and connect findings to the relevant research before drawing conclusions.

Chapter 1

Literature

1. Evolution of e-commerce in wine industry

Wine is an experiential good (Higgins et al., 2015) that offers a ‘social experience’, as we have recently entered an era in which individuals share information, experiences, over a multitude of online platforms (Munzel & Kunz, 2013). As a result of it, organizations need to constantly find ways to better understand their consumers, their motives and behaviors so as to tailor organisational strategies to meet customers’ specific needs (Pelet et al., 2017). E-commerce is growing steadily, offering new ways to interact with and influence customers (Hölle et al., 2020). If we have a close look, this shows us the importance of wineries having an online presence and responsive sites (Viana, 2016).

As stated by Dressler (2018), online offers for wine are increasing as the general consumer attitude to buy online increases. Wine is among the most popular alcoholic beverages ordered online (Kohli, 2022). Although in 2009, it represented only 1% of sales globally in the off-trade channel, in 2019, the share rose to 7% (approximately 2 billion bottles). Furthermore, in 2021, online alcohol sales have grown by 42% compared to the previous year. With the spread of the effects induced by the COVID-19 outbreak, 2020 was a growth year for online

wine businesses (Mastroberardino et al., 2022). A significant factor contributing to the growing popularity of wine e-commerce is the convenient accessibility of wine-related information via the internet, as perceived by consumers (Barber et al., 2006), also wine producers have the opportunity to expand into markets that may be unreachable otherwise (Higgins et al., 2015; Limayem et al., 2000).

Given this growing popularity of ordering wine online, most wineries now have an online presence that helps them advertise and sell their wines (Duarte Alonso et al., 2013). There is a variety of tools available to provide customer interaction and influence, such as social networks, blogs, vlogs, podcasts and, online virtual communities (Thach, 2009), these are key communication platforms for both consumers and businesses (Lockshin & Corsi, 2012). Studies that focused on millennials have argued that the use of social media is aimed at getting to know wine brands and reducing the risks associated with purchases (Atkin & Thach, 2012), while the use of social media has also been shown to influence the purchasing behavior of online consumers and encourages consumers to pay higher prices for a bottle of wine (Sogari et al., 2017).

However, the adoption of wine online purchasing by consumers is still limited and it is not clear whether the importance of the purchasing drivers may vary between online and offline wine (Cobelli & Wilkinson, 2020). There are differences between online and in-store wine purchasing habits. Online wine purchases tend to be larger, likely due to shipping charges (Stening & Lockshin, 2001), and trust has been found to be a major influencer of online wine purchases (Quinton & Harridge-March, 2003). Quinton & Harridge-March (2008) analyzed a sample of store and online wine buyers and found that it is relevant that the online service instills trust for the first-time buyer. Moreover, one study involving online wine purchasing documented that if reference groups around a person have purchased or have plans to buy products using a certain technology, that person tends to regard the technological method as being useful (Sheridan

et al., 2009). Also, regarding online wine transactions, perceived usefulness, and ease of use significantly affect purchase intention because consumers are able to purchase wine within a short period of time resulting in less search time/ costs (Begalli et al., 2009). Convenience and price comparisons are attractive, but people still do not like the fact that wines cannot be tasted and they are worried about the security of the transactions (Lockshin & Corsi, 2012). Within the online environment, there exist various consumer segments that possess varying degrees of expertise and confidence with respect to online retailing.

Mastroberardino et al. (2022) found that, only recently, wine producers began to try to integrate the digital transformation (adapt to the change and look for an online channel) in their business model. The process of designing a website implies considering certain important attributes including a proper navigation through access from mobile devices (Viana, 2016). Technological development has caused the majority of the attention in managing wine e-commerce sites to become oriented toward electronic service quality (Bressolles & Durrieu, 2008; Canziani & Welsh, 2016). Hsiao (2018) considers that operant resources (security, quality) and even those that are more intangible (knowledge, skills), seems to contribute to wine e-commerce success. Among these elements, the request of consumers for trust (Bu & Go, 2008) and experience (Santos & Ribeiro, 2012) can be highlighted.

The wine business is extremely fragmented and very competitive, which creates many opportunities for the entry of new companies, not only for production and trade, but also for other areas and complementary services (Quina, 2022). The original business plan was that e-commerce was only of interest to a more involved segment of the wine drinking population. Instead, wine e-commerce has become a more mainstream product in multiple markets and many producers, brand owners and retailers are incorporating into their business plans (Halstead, 2022). Precisely for this reason, there are already

several producers who are betting on e-commerce, such as José Maria da Fonseca, Quinta da Bacalhôa and many more. Osorio (2021) underlines that, in Portugal, the online sales channels became particularly relevant, accelerating significantly from a small base.

The purchasing behavior of Portuguese wine consumers encompasses multiple channels, namely, winery websites, wine shop websites, and marketplaces/specialized e-commerce platforms. Collectively, these channels account for 9% of the most utilized channels. Significantly, a higher proportion of Portuguese wine consumers who are inclined to purchase online belong to the age group of 35-49 years and exhibit distinctive segment attributes. They are primarily male, with a medium income, frequent wine drinkers, possessing significant knowledge and confidence in the category, and have a keenness to experiment with new products. Although they are more inclined to source wine from online channels than the average wine consumer, they prefer to do so only for wines they are already familiar with (Wine Intelligence, 2021).

The relevance of being acquainted with the purchased product is noteworthy, and this is manifested in the purchasing tendencies of Portuguese wine consumers, who exhibit little inclination towards purchasing international wines. This behavior is corroborated by the declining prices of imported wines in Portugal. (IVV, 2022).

Table 1 reveals an overview of the most relevant manuscripts and studies analysed in the understanding of the topic and its development.

Table 1: Notable Reviews at the intersection of Wine and E-commerce

Studies	Term of the concept	Sample	Database	Method of analysis	Findings or outcomes about cognition
Pelet and Licat (2014)	<i>Level of Internet sophistication and orientation, brand loyalty, risk aversion, involvement, shopping behaviour and perception of authenticity</i>	190 manuscripts	Scopus	Quantitative analysis - survey	Results of the study show that m-commerce and e-commerce applications using social media platforms may prove greatly efficient in the foreseeable future for wine growers. Different ways of selling and disseminating information about their products are observed.
Linch and Ariely (2000)	<i>Price sensitivity for wines, market share of the common wines, and liking of the shopping experience</i>	72 manuscripts	Scopus	Quantitative analysis - survey	Transparent comparison affects the relative attractiveness to retailers of exclusive brands versus those carried by their competitors. Demand for common brands becomes more price sensitive, and the market share of common brands is reduced. Lowering search costs for price should matter less when lack-of-fit costs are higher. Search cost for price should matter more when there are more sellers.

Studies	Term of the concept	Sample	Database	Method of analysis	Findings or outcomes about cognition
Bonn et al. (2016)	<i>Social influence, perceived usefulness, and perceived ease of use</i>	425 manuscripts	Scopus	Quantitative analysis - survey	Outside influences such as meaningful opinions of others, positively affects consumer intentions to use wine sites that are perceived as being useful. Wine involvement has a significant effect upon strengthening the impact subjective norm has upon perceived usefulness. Both perceived usefulness and perceived ease of use significantly affects online wine purchasing intention during online wine transactions, with perceived ease of use having the greatest effect on online wine purchase intention.
Iaia et al. (2017)	<i>Web marketing strategies used by wine family businesses – role assigned to websites, online models, competitive strategies</i>	n.a.	Scopus	Qualitative analysis - Focus Group	The subsequent observation of the websites of the businesses studied showed that family-run Italian wineries use their websites mainly to present information about the business and as a relational tool through edutainment activities; FBs yet neglect the potential of e-commerce.
Mastroberardino et al. (2022)	<i>Support of social commerce for e-commerce.</i>	6 manuscripts	ResearchGate	Exploratory Research	COVID-19 outbreak has given a significant boost to digital transformation and online purchases in the wine sector. While some operators in the sector have merely undergone this change, others have been riding the wave, trying to benefit from it.

Chapter 2

Methodology

1. Research Design

To address the research question and provide more insights on the emergence and evolution of e-commerce in Portuguese wine companies, a qualitative approach was employed (Teherani et al., 2015). This approach was developed with the aim of analyzing and understanding the context in which wine companies working with e-commerce find themselves. This would enable such companies to gain a better understanding of the actions undertaken by themselves and their competitors and facilitate the alignment of their strategies and goals in accordance with the principal trends and future forecasts.

In the study, the participants of semi-structured interviews are purposefully selected (DeJonckheere & Vaughn, 2019) from Portuguese wine companies. To be eligible for the study (Guest et al., 2006), the interviewees had to meet three main criteria: (i) work in a Portuguese wine producing company that has e-commerce; (ii) occupy a position with e-commerce responsibilities within their organization; (iii) actively measure the performance of e-commerce, know the area/activities that are carried out.

Nineteen companies that fitted this criterion were contacted through different channels (email and telephone). However, twelve of them did not provide any

response after several contact attempts and two of them were unavailable to participate in the study. That said, five companies that met the selection criteria agreed to participate in this investigation and were interviewed.

Although many times, in some studies, these limitations may inhibit some analysis and subsequent conclusions, this was not the case as it was still possible to gather essential information since the five companies allowed us to gather finer grained and otherwise difficult to obtain knowledge.

To further support the findings, triangulation was used to obtain supplementary data. Additional information about the cases was obtained from the internet and from experience collected in the curricular internship. The core benefit of triangulation is that it gives the opportunity for the study to uncover deeper meaning and increase the validity (Guion et al., 1969).

2. Case Description

To shed further light on the research question, the study will be carried out by taking into account a multiple-case, enabling more compelling and robust evidence (Yin, 2017).

Henceforth, the initial organization subjected to interview (designated as Company A) is a family-owned winery, possessing a rich legacy, and offering wines from diverse regions, resulting in a wide range of distinct brands. The organization is a specialist in producing wines from the Vinho Verde region, a unique characteristic shared with Company E, which exclusively deals in wines from the same region. Subsequently, Company B, a relatively new enterprise with extensive expertise, has been dedicating significant efforts towards broadening its sales channels and expanding its wine production regions. Like

Company A, Company C is also a family business with an extended tenure in the industry, renowned for its wines from the Setubal region. Finally, Company D is an Alentejo estate with a very strong wine tourism facet, with only one superior wine brand.

All the interviewed companies, without exception, offer additional products to wines in their online store. For example, wine tourism experiences, products/accessories associated with wine consumption, groceries (oils, sweets, snacks, infusions, cheese), decoration items, and gift cards. Company D stands out for the service associated with its online activity, the possibility of doing wine tastings online. Most companies choose to offer shipping on purchases above a stipulated amount or a defined number of bottles.

The companies deemed suitable for the interview expressed a keen interest in participating, acknowledging the dearth of research and investigation in this realm, and the consequent necessity for it.

3. Data Collection

O A qualitative analysis through semi-structured in-depth interviews with employees (e.g., mid-level managers) responsible for e-commerce of five companies was performed during a period of two months. Accordingly, in-depth interviews arise as purposeful interactions in which an investigator attempts to learn what another person knows about a topic to discover and record what that person has experienced, what he or she thinks and feels about it and what significance or meaning it might have (Hesse-Biber, 2010). In-depth interviews are seen as the most common form of data collection for this particular study (Bogdan & Biklen, 1982). This approach allows the gathering of relevant

information and a broader understanding of the past, present, and future of e-commerce in wine producing companies.

For privacy reasons, the names of the interviewees will not be disclosed. E-mail invitations were sent to all potential participants, each individual was provided with information pertaining to the study's purpose. Interviewees agreed to be questioned with granted confidentiality and anonymity with the assurance that their responses would only be used for research and analysis purposes.

Of the 5 cases subject to evaluation and analysis, 3 were conducted with the help of the Microsoft Teams software and recorded with the consent of participants, one interview was conducted over the phone and another, at the request of the interviewee, was answered in writing. The interviews lasted between sixteen and seventy-five minutes and were conducted in Portuguese, to facilitate communication and to ensure better understanding.

Interviewees were questioned about the importance and future trends of the online channel. Hence, questions covered topics such as definition of objectives and strategies, triggers, and incentives to buy wine online, performance over the years, possible investments and implementation and use of mobile-commerce (m-commerce). The interview guide and the related questions are available in Appendix.

While preserving the identity of the companies some details about the interviewees were allowed for public disclosure. Table 2 displays the main characteristics of the interviewees, and Table 3 focuses on the companies. Moreover, Table 3 explores the unique characteristics of each of the companies, addressing the years of experience in the market, in how many wine regions they operate (origin of the wine/wines they produce and sell) and the number of brands they have.

	Job Position	Gender
Manager A	Wine Tourism, Innovation and Development Director	male
Manager B	E-commerce and Digital Marketing Manager	male
Manager C	Responsible for Institutional Communication and Wine Tourism	female
Manager D	General Director	female
Manager E	Responsible for Communication	male

Table 2: Overview of managers' information

	Experience (years)	Regions (Portugal)	Brands
Company A	>150	4	8
Company B	>10	4	4
Company C	>180	5	>30
Company D	>5	1	1
Company E	>40	1	1

Table 3: Overview of companies' information

4. Data Analysis

Following an abductive approach (Dubois & Gadde, 2002), the recorded interviews were transcribed using the Trint software and then were translated into English and analyzed within 24 hours. This approach enables the elucidation and explanation of observed facts (Lipscomb, 2012; Richardson & Kramer, 2006). Subsequently, the contents were analyzed through content analysis, a qualitative research method used to understand the content of textual data (Mayring, 2019).

For testing the proposed conceptual relationships among the research of this multiple case study, the data gathered was constructed following the "Gioia's"

three stage grounding approach (Gioia et al., 2013). The research stages are unitizing, categorizing and aggregation. In the unitizing stage, researchers identify key terms and alleged units that can range from a single term to a whole sentence. Next in the data analysis, in the categorizing stage, the components/units are catalogued and labeled to be associated with more general concepts (the need to adapt to a new reality, recognition of the main needs, evaluation of the main triggers and incentives). Finally, when saturation point was reached, in the aggregation stage such concepts are aggregated into broader dimensions (external stressors, motivators, performance, m-commerce). The overview of the analysis perform is presented in table 4.

First Phase (unitizing)	Second Phase (categorizing)	Third phase (aggregation)
Phrases about the company's motives to create e-commerce	Need to adapt to a new reality	E-commerce Strategizing
Sentences about the company practices to reach goals	Definition of objectives, strategies, and ways to communicate	
Sentences about consumer thoughts on buying wine online	Evaluation of the main triggers and incentives	Motivators
Sentences about the company's ways for customers to reach e-commerce (website, newsletters, social media)	Sentences about the challenges and provisions	Communication Channels
		Performance
Sentences about the managers opinion on mobile shopping	Conversion, visits, motives, and opinions	M-commerce
Claims about the company's investment decisions	Recognition of the main needs	Impact of External Stressors
Sentences about trends and future expectations	Access, livestream, exclusivity, transports	Further development

Table 4: Data Structure

Chapter 3

Findings

The questions asked during the interviews allowed us to obtain answers based on the manager's own personal and professional experiences. The relevant results will be highlighted as descriptive statements from managers, presented in italic, alongside the respective identification. Each firm is going to be kept anonymous as such, the firm and informant names presented are going to be referred by using letters (e.g., manager A, company B...).

1. E-commerce Strategizing

Four of the five companies interviewed started their online business in 2020. Although, quoting manager D: *The idea had already come up before the pandemic and the pandemic forced us to launch the store.* And it was precisely for this same reason that the remaining three embarked on this project. Manager A clarifies the decision with: *Given the situation of having to close our doors, we were unable to sell from our physical store. We started thinking about alternatives to keep the business active, so the first solution that came up was to create an online store.* However, being a sudden and extremely quick decision, manager B declares that: *the company decided to advance this project with the resources it had, in a very experimentalist perspective.* Only one company created the online store much earlier, in 2014, thus

deciding to extend its offer to the online channel, manager C justifies the decision: *we felt the need to open this channel (...) it was not always easy for consumers to find some of them (especially the most exclusive editions and the most super premium wines).*

Having said that and considering the recent creation of an online channel, the definition of objectives went through experimentation and the reproduction of what was more positive in previous years, reciting manager D: *initially defined in a more experimentalist way because we didn't know well, and we didn't know the reality of e-commerce.* Manager B assumes that: *The e-commerce objectives are defined based on the growth of previous years.* Company C is ruled and guided by an annual plan, not only of sales targets but also of strategies and campaigns to be implemented throughout the year, contrary to company E, which does not define objectives, viewing them as general and institutional objectives and not numerical.

To attain the objectives, which are distinctly defined from an experimentalist standpoint, organizations formulate strategies for their implementation. At a strategic level, companies A, B and C work in a very similar way since they have more than one brand. They try to communicate in the most coherent and cohesive way following the values of the brands, as manager A assumed: *We always try to have a transverse/central alignment in all communications in the online store.* However, as they own different brands, they face a great challenge, manager B elucidates: *We have strategies for different types of wines and regions and for each of these we develop a personal funnel and within the funnel we have strategies for the middle top and bottom of the funnel. When there is so much diversity and different types of targets, we must try to get it right and then optimize the campaigns and qualify them.* As company B, manager C signals: *our strategy adapts to each category and product placement.* Although with a more specific public, company D ends up resorting to the same strategies as companies A, B and C. Much of its strategic plan ends up being dedicated to: *digital marketing (...) highlight our store within our website, newsletters, social networks (...) advertising the same campaign across multiple channels.*

Notwithstanding the implementation of these strategies by Company E, they do not execute them with the same regularity or emphasis, as they primarily utilize their website to share experiences and promote wine tourism.

Over time, through the accumulation of experience and analysis of the performance of strategies and their resultant impact on objectives, companies begin to identify their major deficiencies, requirements, and areas for improvement. Thus, they were asked about the priority of investment in e-commerce. Only company E did not express interest in investment, citing manager E: *Nothing, we could but we don't want to, it's not strategic*. The rest would give priority to equivalent issues, such as Company B and C who liked to invest on, quoting manager B: *Everything that involves optimization technology and mobile first, investing in site navigability*. Also, company A and D agreed to invest in Google ads, because, as manager D revealed: *if you search for our wine on Google, several online stores already appear and ours will not appear in the spotlight*. Other investments were taken into account such as influencer marketing, photographic content creation, and open shipments to the rest of the world.

2. Motivators on wine e-commerce

Being companies that work daily with the online reality, they recognize and identify that there are some aspects that further enhance the purchase of wine online.

Questioned about the main triggers and aspects that lead consumers to buy wine via e-commerce, the responses of the 5 managers were mostly unanimous. As stated by manager B: *Convenience, point one, when people want to buy a larger number of bottles, they choose to do it online to avoid having the work and risk of*

breakage. Second, when research is done over the internet, we have access to information about the wine, processes, reviews. We have better control and access to information. Another point that is extremely favorable. Online we manage to have greater diversity. When you have an online store, the variety of products and space is much greater than a physical store. This opinion is aided by manager D who provides insightful information on other relevant topics that instigate the purchase: *Ease, agility, and speed. It is easy to find and therefore the easiness, through online, of finding and reaching the desired brand is very great. And the agility, in fact, the comfort, the fact that we send the wine to the person's home is very different from the person having to go to a cellar and carry the boxes.*

With regard to what encourages consumers to buy wine in an online store, it has a lot to do with promotions and discounts. As explained by manager A: *It is very much based on promotions, discounts (...) what drives people there has a lot to do with the communication we do.* To sustain this idea manager C believes that: *On the one hand the price factor is relevant, and promotion is important for the common consumer, on the other hand having available wines that you cannot find so easily, exclusive editions, etc.* And this prompts an interesting duality, the segment in which the wines are and the ease with which they can be found makes a slightly change in the scenario. Supporting this statement, manager D endorses his point: *That is, before the wine is launched, we do a pre-sale for our customers in our database and these customers can purchase the wine before the wine hits the market. It is a situation that happens more in the luxury segments, more exclusive segments of the high segment (...) I think people are more sensitive to price, to campaigns, to being able to buy wine at a discount, to get something extra. So, I think it depends a bit on the segment, but I would say that in our case, this issue of exclusivity, having access to products that are not yet on the market, being the first to try them out.*

Managers concur that consumer motivation for purchasing wine online is driven by discounts and promotions, availability of rare wines, and their

exclusivity. Additionally, a distinct purchasing behavior is acknowledged based on the specific wine segment being procured.

3. Communication channels and Performance

The five companies use their communication channels to achieve the defined objectives, in this way, the performance and the communication channels are closely linked and will be analyzed hand in hand.

All five companies work with three main channels, website, social media, and newsletters.

Regarding the first channel, a website is seen as a crucial channel, mainly for companies who have more than one brand, that way, consumers can more easily buy that brand even not knowing who the producer is, as stated by manager A: Hence many visits to the online store and many sales, it is a good conversion channel. Customers who are fans of a brand, search for a certain product, then come to our website and realize that there is a way to purchase a product that they probably won't find elsewhere.

With regard to the social media that are for manager C the channel that best converts, on the other hand, for manager B they represent a great challenge: Within social media we have a challenge which is the great differentiation of brands. Each social media is independent and works in a very conceptual way with each wine and process. To get around this challenge, we are going to create an Instagram for e-commerce and sales of the different wineries and wines that we have. And we need to differentiate the traffic and differentiate the content. Regarding this topic, manager A adds: Social networks, which are good vehicles for dissemination, are not so much materializing, that is, it is not a channel that has high conversion rates, but it directs a lot of people. Completing this idea and

substantiating the notion of the other participants, manager D argues that communication and conversion on social networks becomes more difficult because: we have a bit of a mix of people.

Finally, the third channel used are the newsletters, and according to manager A: the one I think works best. Being an almost unanimous opinion, manager D believes that the main reason for this higher conversion is due to the fact that the newsletters are communicated to: people who already know our brand, have even been there, already known our winery, already know the wines. Manager B also intensifies the idea that: In general, in the vast majority of markets, this is due to the fact that the customer already knows you, because he has already bought from you.

Despite having the three channels, manager E states that the company does not use them much, since he believes they are efforts that are not rewarded. Most of its channels focuses on experiences and wine tourism activities, and not in the direct sale of wine by the bottle.

The entire performance of e-commerce comes from the way they are worked, launched, and presented to their audience. Updated channels and e-commerce performance are closely correlated. Performance is measured with the fruits of the channels used.

Commencing the evaluation of corporate performance from the initial stage of almost all entities (2020), it is feasible to underscore certain noteworthy information. Company A did not have a very positive start, realizing that in the beginning (2020) the greatest demand was for products that were more difficult to find. Nevertheless, in conjunction with effective communication and consistently during periods of heightened consumption and celebratory occasions, specifically Black Friday and Christmas, the organization has successfully heightened and enhanced its performance.

Contrary to what was felt by company A, manager B portrays his company's situation as: very positive and considerable performance in 2020, a good year for all e-commerce. Everything was closed and nobody could spend money if it weren't for the online channel. In 2021 it was a partially mixed year, physical businesses opened and closed, which also enabled good performance. In 2022, with the opening of markets, there was a relative drop in online sales.

With a very similar scenario, manager C exposes its company reality: in the pandemic years (2020 and 2021) we had a very significant increase in online compared to the previous ones. In our case growth of around 500% (in volume and value). In the post-pandemic period, we already felt some natural cooling of purchases through this channel. Manager E is also feeling a stagnation in recent times and believes that what made the online business exponentiate in 2020 was the fact of selling experiences and tasting packs as a substitute of wine tourism activities.

With a comparable picture to company A, manager D: noticed that there are buying peaks (Christmas time). In addition, it indicates that the store has been growing year after year in terms of turnover and this is mainly due to: having a target audience, perhaps of an older age, is already starting to shop online (...) and because we have increased the product portfolio in the store.

Hand in hand with the feeling of stagnation and the lack of purchasing power of consumers, manager D believes that: One of the reasons is also because we raised prices, because production, the entire value chain has much higher costs. We raised the price of our wines and so we now feel that we have to be more dynamic in terms of campaigns and promotions, because people are now more price sensitive.

Managers A, C and D, recognize that, citing manager A: The percentage of online store sales compared to the company's total profits is very residual. Manager C upholds that: Still, despite great numbers, they are still a small

percentage of the company's global sales. However, there is a positive and hopeful view regarding online wine trading, manager D believes that: The online store is still a drop in the making at the moment, but we feel that it is essential because the growth it will experience in the coming years will be very large. And those who do not have an online store, are not online, will be left behind.

4. M-commerce

When asked about the role of m-commerce in their companies, all managers were aware of the concept with the exception of manager E. Three of the five managers interviewed recognized and highlighted the interesting fact that the device with the highest number of visits and conversions did not match. As manager A exposed: There is an interesting thing that is, our visits to the site, nowadays are already mostly mobile. Our purchases are still mostly on the desktop or at least have a much higher ratio, given the number of visits we have. Alongside this affirmation, manager B shares the same opinion and justifies the phenomenon: People end up making the purchase on the desktop because it's easier to enter payment details, there's more security, having a bigger keyboard is safer.

As a result of this ratio, certain managers acknowledge the circumstance as a failure and are willing to render their channels more compatible with mobile devices, as is the case with manager A: I think our website could be more user friendly for mobile (...) Even in terms of viewing the pages, the menu is not very intuitive, although it is adjustable, I am not 100% satisfied with the way it is seen on the cell phone. Other managers, in addition to recognizing the need, are already making efforts to improve the navigability of their website, as is intended by manager B: the challenge is, more and more, to increase the conversion rate

on mobile, we are currently trying to implement the purchase with just one click on our website. And also, manager C, that states: we are carrying out this transformation. Unlike the others, manager D believes that the company's online store is already designed according to the challenge: Mobile has now taken over e-commerce. Our website is mobile friendly and easy to navigate.

5. The impact of External Stressors

The context that encompasses this field of operation brings about certain transformations, leading to the emergence of trends that shape the future. In light of the principal trends in the online wine industry, the interviewed managers held divergent perspectives. As the main trends were identified, the appearance of smaller stores with fewer items, manager B believes that this phenomenon will cause *people to have to search for different products online, different labels, different drinks. Access to most products will be online.* Alongside this trend, manager C also judges that logistics has been undergoing changes. With regard to speed, delivery on the same day of the order and picking points, it should be noted that manager D indicates this matter as the target of a necessary change and improvement. Artificial intelligence is also put into equation by manager D, who believes that its application will have an impact on payment methods.

In the future, the creation of private clubs for exclusives or anticipated sales is expected and manager E hopes that, very soon, it will be possible to find more services associated with online purchases. As for the future of online wine sales, manager A supposes that: *we will continue to see an evolution. I think we gained a very large base of consumers who didn't shop online and who are now aware of this universe, the new generations tend to buy more online. Evolution will always be positive; we have to find ways to respond to what people are looking for.* Manager D

complements with: *I think that there is still a lot to evolve, but that the future will be completely online business.*

Chapter 4

Discussion and Implications

1. Theoretical implications

In the online business, the topic of wine e-commerce is extensive and has had scholarly attention throughout the years. Recently Mastroberardino et al. (2022) brought into spotlight exploratory research on wine social commerce. The field of wine e-commerce has emerged primarily as a result of necessity, which arose with the onset of the pandemic. The pandemic has triggered a shift in the mode of business operations from physical to virtual, thereby opening up new avenues for investment and growth. While causality cannot be established with certainty, the correlation between the pandemic and the rise of wine e-commerce is evident and highlights the path of development in this sector. Although it is something expected, as Kraus et al. (2020) revealed that companies of all sizes across every industry adjusted their business models to the changing environmental conditions quickly, there are still no studies that prove that the appearance of the majority of online wine stores had to do directly with the Covid-19 pandemic. The Covid-19 crisis has influenced consumer behaviour and the ways in which marketing can be used (Dabić et al., 2023). The pandemic has led companies to seek and establish contact with the customer, a contact that was previously almost nonexistent (traditionally, the wine producer always had the trader as a

direct interlocutor) (Mastroberardino et al., 2022). After the outbreak of a pandemic, most wine companies chose to pivot their business toward online realm. Which implied an additional orchestration of resources as a key strategic aspect for a company to retain competitive advantage. The occurrence of the direct channels linking producers and consumers expanded greatly with the increase in Internet usage. As the transactions are directly with the consumer, e-commerce is the most prominent method for connecting and communicating with the consumer, introducing them to new products as well as conducting the sale (Jiang et al., 2016; Cobelli & Wilkinson, 2020).

When utilizing this digital platform as a means of communication, it is crucial to assess and acknowledge the techniques and tactics established by companies. Given this importance and once addressed in this study, it is concluded that most brands are committed to coherent communication, essentially using 3 channels, website, social networks, and newsletters. Osorio (2021) denotes that, in Portugal, it was the online communication channels that saw the real revolution with marketing teams across the country shifting their communication and targeting strategies in a fantastic way.

The implementation of tactics in the intended channels ought not to solely involve their development and implementation, but also encompass the manner in which content is presented. It is imperative that the material is conveyed in a lucid manner and tailored to the consumer's device. Extant literature has assumed that m-commerce is experiencing exponential growth worldwide, with 356% growth rates for sales via smartphones and tablets (Pelet & Papadopoulou, 2015). Notwithstanding the recognition of m-commerce as a familiar concept, data collected suggests that it is still not a prevalent focus of investment or development among interviewees, who acknowledge certain inadequacies. Further research is needed to determine whether users also perceive this discrepancy and encounter navigational challenges on corporate websites.

However, this topic requires further investigation among other samples. The findings on this topic bring into evidence a curious remark- the conversion rate is higher in desktops rather than in mobiles, where most visits come from. To jointly analyze the topics of wine m-commerce and conversion became an interesting and underexplored area of study.

2. Managerial Implications

Much of what concerns digital knowledge, even though there is a lot of information, it becomes easily outdated. Hand in hand with this observation, we have the managers' recognition of the lack of research and studies in this still so recent area. They considered difficult and almost non-existent the information shared in this area. This eagerness to want to know and collaborate with the study demonstrate readiness and willingness to contribute to knowledge, to the acquisition of new capabilities and venues to further enhance their businesses growth.

When analyzing the interaction of managers with the role played by e-commerce in their companies, the study proves that they are equally aware of the weaknesses and needs of their consumers. As, considering the opinions of the various managers all within the same subjects, they recognize the main triggers and incentives for buying wine online. In general, it can be argued that all the five companies are very aware of their effort and manage to work well with their strategies and channels to achieve their goals in order to circumvent more unfavorable situations.

This represents a promising starting point for companies that have yet to establish an online presence. The demonstration of cohesion and shared

knowledge among such companies serves to inspire newly established firms to recognize the potential of this field. It is imperative for those companies that have yet to embrace e-commerce to emulate the successful strategies employed by more experienced companies, including the utilization of email marketing and the continuous use of newsletters, which have proven to be the most effective channel for conversion.

On the other hand, it is crucial to acknowledge the goals that remain unfulfilled and must be addressed. Many of the companies surveyed regard m-commerce as a challenging investment. Website navigability is a key determinant of successful online operations, and it is thus recommended that companies prioritize the optimization of their interactivity and the adaptation of their websites for mobile devices to facilitate smoother processes and enhance purchasing performance.

Nevertheless, website navigability is not the only area in need of improvement. Most companies perceive online commerce as a permanent fixture and recognize that, to achieve superior performance, they must enhance other aspects of their operations, such as distribution logistics. To align with emerging trends in the delivery sector, including faster delivery times, same-day delivery, and pick-up points. This component of the process is equally significant in online transactions and should not be overlooked.

Chapter 5

Conclusion

By analyzing the collected data, it is possible to conclude that the covid-19 pandemic triggered the appearance of most online stores of Portuguese wine producing companies. Online stores have evolved considerably, and companies are betting on the sale of other types of wines, products, and services, meaning that gradually the investment in this area is relatively high.

Accompanying this decision and given the recentness of the activity, its objectives are also defined based on experimentation and a method of trial and error. When it comes to strategies, the communication channels most used to implement them are websites, social media, and newsletters. Since newsletters have the highest conversion rate, it is important to pay attention to building databases with loyal consumers. These are believed to be the main customers of an online business.

Although in an initial phase in adopting e-commerce practices, Portuguese wine producers know their customers well and are becoming gradually more aware of their main triggers and incentives to buy online. It is important to note that this knowledge is central to the definition of strategies and to define the way in which they communicate and therefore is subsequently applied in all actions.

As far as performance is concerned this is still considered a drop in the ocean, e-commerce still has very residual results, however it is seen as something crucial. Companies believe that the existence of e-commerce is necessary for the

image and affirmation of the company. It is also seen as a long-term investment, as it is a means of learning and a guarantee for an online future. E-commerce is recognized as a driver with great potential for growth, market size and financial return in the near future.

By further exploring the concept of m-commerce, an interplay between this approach and investment is vital for continuous and added value creation. The navigability factor is seen as crucial in website performance. To foster explore such a topic it is suggested additional research on m-commerce conversion. It is critical to understand what is driving consumers to visit websites on their mobile phones but to make purchases on desktops.

It is also suggested further exploring on the relationship between wine content newsletters and subscribers, as a venue to deep dive into the motives behind subscribing, and the act of purchase. Understand if this is the essential way to convert consumers to purchase and why.

When interpreting the results of this research, several limitations should be stated. This study conducted exploratory research and, by adopting in depth interviews sampling technique, it resulted in a reduced sample which may also be subject to interviewees biases. However, the sample analyzed, is valid and reliable, and made it feasible to recognize subsections of analysis to improve understand the emergence and evolution of e-commerce in wine producing companies. In addition, the number of studies, knowledge, and information about wine e-commerce in Portugal is fairly residual. The primary reason for this constraint is the relatively small number of customers who are presently buying online. Despite these limitations, this study provides producers with the means to examine potential vulnerabilities and risks, as well as opportunities and advantages within their company.

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Appendix

Block A.1.: Introductory – Organization

Company name:

Block A.2.: Introductory - Interviewee

Name:

Position in the company/Could you tell me more about your day to day in the company?

Block B.1.: Wine – e-commerce

1. In what year did your company started the online business? Could you guide me through the development process of the e-commerce in your company?

2. Could you share with me your objectives and the strategies/approaches adopted to reach those objectives? (Number of sales, revenue, exposure, presence in the market, diversification, partnerships)

3. How actually the company evolved to meet those objectives? (Do you modify your offering, communication, social media? Not every wine that you make is for the same target, how different strategies are made over different groups/targets?)

4. I believe we covered some aspects related to the company, and now I am really interested in understanding what aspects guide/trigger consumers to buy wine via e-commerce.

5. From your experience what incentives the consumers to purchase via e-commerce? (Promotions, exclusive wines...)

6. Which channels are guiding customers to the e-commerce? Which one converts more?

7. Would you mind telling me more about your performance in, 2019/2022? Could you tell me the share of your sales that were generated through e-commerce?

8. Imagine that you can increase your budget in 20% in which areas do you think you should invest more? (Website design, social media, distribution channels)

9. What is your opinion about m-commerce is? Are you testing it/investing in it? What is happening nowadays, can you run me through how it happened, what are the benefits? Most used device?

10. Looking at the current situation of your e-commerce business, what are the main trends you are finding and what are you expecting to find in the future? What do you think is the future of selling wine online?