



**CATÓLICA
LISBON**
BUSINESS & ECONOMICS

**THE IMPACT OF THE WINE ROUTES ON THE
INTERNATIONAL PROMOTION OF THE
PORTUGUESE WINE: THE CASE OF THE VINHO
VERDE ROUTE**

Daniela Filipa Nunes Martins
152114326

Dissertation written under the supervision of Nuno Cardeal

Dissertation submitted in partial fulfilment of the requirements for the MSc in
Management at the Universidade Católica Portuguesa, May 2016.

The impact of the wine routes on the international promotion of the Portuguese wine: the case of the Vinho verde route.

Daniela Filipa Nunes Martins
Católica-Lisbon, School of Business and Economics

May 2016

ABSTRACT

The aim of this research is to understand to which extent wine tourism contributes to the internationalization strategy of wine. The emphasis will be on Portuguese Wine Tourism, more precisely on the Vinho Verde route. The major topics of concern are understanding how wine routes are composed, what tools are used to promote Portuguese regional wine abroad and what development level the Vinho Verde route has. The multiple case study approach will serve as a way to answer the different research questions and to create a comparison between an international player, such as Champagne, that is under the same conditions of wine exclusivity as the Vinho Verde. Data collection was mostly based on primary data, although secondary data backed the research. Eight interviews were made with agents linked to the wine and wine tourism industry. The conclusions indicate that wine routes have a soft contribution for the Portuguese wine recognition abroad, being that this role is not crucial. The fragmented offer, lack of funds and the almost exclusive national focus are the main reasons on why this impact is moderate. The recommendations for better development and efficiency are based on creating synergies and applying more funds to training, promotion and setting tourism programs.

Key words: Vinho Verde; region; wine; wine routes; promotion; exports; wine tourism.

RESUMO

O objetivo desta pesquisa é perceber em que medida o Enoturismo contribui para a estratégia de internacionalização do vinho. O enfoque será no Enoturismo português, mais precisamente na Rota do Vinho Verde. Os tópicos de maior atenção são entender como estão compostas as rotas do vinho, que ferramentas são usadas para promover o vinho regional português no estrangeiro e o nível de desenvolvimento que a Rota do Vinho Verde tem. A abordagem do múltiplo caso de estudo servirá para responder às diferentes perguntas de investigação e para criar uma comparação entre um agente internacional como o Champanhe, que possui as mesmas condições de exclusividade vínica que o Vinho Verde. A recolha de informação baseou-se principalmente em informação primária, apesar de informação secundária ter apoiado o estudo. Foram feitas oito entrevistas com agentes ligados à indústria do vinho e do Enoturismo. As conclusões indicam que as rotas do vinho têm uma ligeira contribuição no reconhecimento internacional do vinho português, sendo que este papel não é crucial. A oferta desfragmentada, a falta de fundos e o quase exclusivo foco nacional são as principais razões deste impacto ser moderado. As recomendações para um melhor desenvolvimento e eficiência baseiam-se em criar sinergias e aplicar mais fundos à formação, promoção e definição de programas turísticos.

Palavras-Chave: Vinho Verde; região; vinho; rotas do vinho; promoção; exportações; enoturismo.

ACKNOWLEDGEMENTS

First of all I would like to thank my supervisor, Professor Nuno Cardeal, for his guidance and availability shown towards the continuous revision of my work and also for providing me with valuable and constructive insights for the improvement of my thesis.

Then, I want to appreciate all the interviewees in this research that, although having major concerns and scarce time due to professional motives, were available to help me with my questions and were always very contributive in giving me information and suggestions to better explore my case study.

I would also like to thank to all the wineries and wine tourism business representatives in Portugal and France that participated on the survey that I sent.

Also, I have to praise Sandra Alves' patience and availability for helping me during this entire process with all the text translations to French.

And last but not least, I want to thank to everyone that indirectly contributed for all this work: the emotional support, the continuous guidance and opportunities that I was provided with made me who I am today and gave me the tools to thrive the best way I can. For this, thank you very much my family, my friends and Católica-Lisbon.

TABLE OF CONTENTS

ABSTRACT	II
RESUMO	III
ACKNOWLEDGEMENTS	IV
TABLE OF CONTENTS	V
LIST OF CHARTS AND TABLES	VI
LIST OF ABBREVIATIONS	VII
1. INTRODUCTION.....	1
2. LITERATURE REVIEW.....	3
2.1 Wine Tourism.....	3
2.1.1 Wine routes: main features.....	3
2.1.2 Context	4
2.1.3 Drivers for Visitors.....	4
2.2 International Promotion.....	6
2.2.1 Image Promotion	6
2.2.2 The Portuguese Wine Case.....	6
2.2.3 The Role of Tourism on Promotion and Exports	7
2.3 Research Questions.....	7
3. METHODOLOGY AND DATA COLLECTION.....	8
3.1 Research Approach.....	8
3.2 The Vinho Verde Case Study	8
3.3 Data Collection.....	10
3.4 Criteria for the Quality of the Research Design	12
4. RESULTS ANALYSIS.....	13
4.1 The Experience around Wine Routes	13
4.2 Demand over the Portuguese Wine Routes	14
4.3 The Wine Routes' Role on Portuguese Wine's Visibility.....	15
4.4 Promotion on Portuguese Wine vs. Promotion on Wine Routes.....	15
4.5 The Vinho Verde Route.....	17
4.6 The Champagne Region: a benchmark.....	22
5. CONCLUSIONS.....	28

5.1	Recommendations	30
5.2	Limitations.....	31
6.	REFERENCES.....	32
7.	APPENDIX.....	35
	Appendix 1: The Vinho Verde Region and its Wine Trails.....	35
	Appendix 2: The Champagne Region and its Wine Trails.....	36
	Appendix 3: Interviews with Wine and Wine Tourism Stakeholders.....	37
	Appendix 4: Survey for Wine Sellers	46

LIST OF CHARTS AND TABLES

Chart 1: Main economic activities of the Wine Sellers in the Vinho Verde region.....	17
Chart 2: The Tourism Offer by the Vinho Verde Agents.....	19
Chart 3: Main economic activities of the Wine Sellers in the Champagne Region	22
Chart 4: The Tourism Offer by the Champagne Agents	23
Chart 5: International demand over wine and facilities.....	25
Table 1: Information Sources	12
Table 2: Main nationalities of the visitors in the Vinho Verde region.....	20
Table 3: The impact of the Vinho Verde Route on the Vinho Verde Business	21
Table 4: Number of visitors per month in the two regions.....	23
Table 5: Main nationalities of the visitors in Champagne.....	24
Table 6: Sources of Contact with Foreign Buyers.....	26
Table 7: The benefits of belonging to a wine route (WR).....	27
Table 8: The impact of the Champagne route on Champagne’s international recognition	27

LIST OF ABBREVIATIONS

- AMPV- Associação dos Municípios Portugueses do Vinho
ARVP- Associação das Rotas de Vinhos de Portugal
ATPN- Associação de Turismo Porto e Norte
CVRVV- Comissão Vitivinícola da Região dos Vinhos Verdes
D.O- Denomination of Origin
FENADEGAS- Federação Nacional de Adegas Cooperativas
FITUR- Feira Internacional de Turismo
G.I- Geographical Identification
IVV- Instituto da Vinha e do Vinho
VV- Vinho Verde
WR- Wine route

1. INTRODUCTION

For the past few years, the wine industry has had important progresses in terms of production and international sales. Since 2010 the growth of the global wine market has been growing, reaching in 2015 a total value of more than 300.000 million dollars (MarketLine, 2015).

In Portugal, this industry has a lead position in its trade balance and consequently a big impact in the economy and social influence (Panzone & Simões, 2009), since around 70% of its production is meant for international markets, representing for Portugal a positive outcome of approximately 576 million euros in exports in 2011 (AgroGes, 2012).

This reality has enhanced wine regions, giving it notoriety on its production and also its landscape. As a way to optimize this potential, wine tourism was developed in these regions and investments were made in order to restore and improve facilities, open its doors to tourists and integrate the wine routes, with the goal of increasing its product awareness, loyalty and sales volume (Correia, Ascensão & MW, 2004; Costa & Kastenholtz, 2009).

Studies conducted by Fischer and Alana (2009) in assessing the German tourism on Spain and its relationship with exports, concluded that there is a positive correlation between Tourism and exports, mentioning inclusively the wine sector. They argued that these effects could be felt from 2 to 9 months on the country's trade balance.

With 50% of demand in wine tourism represented by international individuals (Turismo de Portugal, 2015) and because there is still little research on cases of wine routes performance (Correia, Ascensão, & MW, 2004) and its link to wine exports, further analysis would be relevant to gain a perception of this specific phenomenon in the Portuguese commerce and, more broadly, in its economy.

Taking this into account, the aim of this study is to understand to what extent the Portuguese Wine Routes contribute to the international promotion and trade of the Portuguese wine, developing a case study of the Vinho Verde region.

In order to help answering this problem statement, there are some research questions that complement this study and give a theoretical line of reasoning to this subject:

Research Question 1: What features characterize the wine tourism?

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

Research Question 3: How is the Vinho Verde route characterized nowadays?

The methodology used to convey this research is based on surveys and interviews (primary data) and existing official reports and statistical information (secondary data).

The goal is to use both qualitative and quantitative methods as these contribute to a more complete and extensive outcome that provide complimentary information to the topic under study (Kelle, 2006).

Basing on some fundamentals obtained by literature review, an international benchmark and also insights from important stakeholders in the Portuguese wine industry it will be possible to gather qualitative information that will provide a specific and focused characterization of the topic under analysis.

Moreover, assessing Vinho Verde wine houses' performance through a questionnaire will allow the obtainment of specific values for the set variables that this thesis intends to analyze (number of visitors, nationalities, ages, motives for visiting, etc).

When doing case studies, it is important to start with a theory development on the investigation questions (Yin, 2009). Thus, this research will start by having a literature review on the topic where the research questions will be analyzed on a theoretical point of view, followed by the methodology description and the data gathered from the different agents along with its analysis.

Finally the presentation of results and respective conclusions will reveal the main findings on the problem statement and some recommendations on future research on this topic will be made.

2. LITERATURE REVIEW

2.1 Wine Tourism

Wine tourism is defined by the set of activities such as visiting wineries, museums, participating in wine related events like fairs and tasting wines (Simões, 2008) that, altogether, promote a wine region and its products, contribute for the development of these as a destination and also as an opportunity for producers to sell its wine and associated products directly to visitors (Brown & Getz, 2005; Costa & Kastenholz, 2009).

Increasing the exposure to local goods, creating brand awareness, knowledge about the product and loyalty through the direct contact with the producer are some of the many advantages listed by Jitareanu (2012) in his studies on global trends for wine marketing. This author also mentions that it is possible for all dimensions of wine producers to sell products with increased margins as there are no intermediaries in the sale process, and also a good chance to create marketing intelligence on products and customers.

Thus it can be a powerful tool to increase tourism, mostly in rural regions because, as a marketing strategy, it is considered a brand differentiator (Barber, Donovan & Dodd, 2010).

However, there are some drawbacks such as the high costs of creating facilities for wine tasting and hosting visitors as, overall, wineries have a limited number of guests and must also guarantee that there is stock available for other distribution outlets (Jitareanu, 2012).

2.1.1 Wine routes: main features

Wine routes are a very important part of wine tourism and can be seen as a valuable instrument for its development (Costa & Kastenholz, 2009; Simões, 2008).

These are signed and advertised trails that include a mix of material and immaterial resources (Arfini et al., 2003) in which *terroirs* and wineries' production can be presented as tourism supply (Simões, 2008).

A wide diversity of associated entities is present on these routes: from wine makers to warehouses, wine associations, museums, hotels and country houses. The dimension of these associates varies considerably, but in all of them the common goal is to provide a set of activities that goes from grape harvesting to buying wine (Simões, 2008).

The creation of these routes allows the wine business in these regions to increase its sales, attract new customers, set new partnerships with other producers that are equally integrated in these trails, test new products, potentiate cross-selling, among others (Costa & Kastenholz, 2009).

2.1.2 Context

The investment in such tourism structures started in the 1980s by the European Commission with the goal of increasing the valorization of rural areas, making its agriculture more competitive, with better quality and be more sustainable (Arfini et al., 2003).

In the Portuguese case, the level of dynamism within its routes was also widely dependent on the associates own initiatives, like the tourism regions' investments. Wine makers, bottlers and warehouse's owners are the ones who have contributed the most for regional wine tourism development, through the improvement of facilities and investment in more production.

There are differences between routes and the services provided amongst them: the access to financial resources is very distinct and this is exposed on the quality level of its structures and the offer to visitors.

General coordination, control on performance, better networks, reservations' centrals and better promotion are critical factors to be taken in concern to improve these facilities and increase its strategic mission (Simões, 2008).

Moreover, the creation of synergies between the different agents included in these routes is of the utmost importance as one member alone would not be able to attract a big number of individuals, and the combination of efforts will allure bigger masses of visitors and potentiate demand for the services being provided (Correia, Ascensão & MW, 2004). Nevertheless, the authors also mention that the majority of visitors are regional and national, which highlights the need to study what can still be done to promote these routes to international markets and attract foreign tourism segments.

In order to reach wider markets and geographies, strategic alliances with competitors, horizontal and vertical partnerships are crucial for the wine promotion across borders (Arfini et al., 2003). The participation in wine fairs and trails are tools that can also be used to increase people's awareness on this product and its singular characteristics that are distinct from other wines of different regions.

Hence, there is a growing importance in establishing networks between hotels, restaurants, travel agents as an off-site marketing strategy (Barber, Donovan & Dodd, 2010).

2.1.3 Drivers for Visitors

There are several reasons that take people to visit wine routes: Brown and Getz (2005) mentioned that for some people these places are almost as a pilgrimage, where they get to be in contact with places and products that have high personal value; Alant & Bruwer (2004)

organized the reasons for visiting a wine region into three main motivational framework dimensions, being these the visitor's preferences and traits, the region's facilities and attractions and the dynamic of the visit itself. Nevertheless this type of division generalizes motivations, as the study was conveyed in two different wine areas in which the tourists' preferences was in some cases, considerably distinct, leading the authors to generalizations of the motivational framework that do not apply to every region.

Albeit a wide range of studies analyzes the impact of the wine tourism on the regional development and the motives for the visit (Alant & Bruwer, 2004; Batra, 2008; Brown & Getz, 2005; Byrd et al., 2015), buying wine being one of the main reasons (Alant & Bruwer, 2004; Nella & Christou, 2014), none of them takes the specific case of the corporate segment and studies how business people in the wine industry look for these places as a source of new trade opportunities, since this segment represents a minor portion of the visitors (Alant & Bruwer, 2004), leading to the hypothesis that wine tourism *per se* may not be a relevant driver for establishing international networks for future wine business and exports.

The fact is that many organizations do not collect and analyze information about its customers in order to properly identify the different market segments and be able to adapt its products to their demand (Costa & Kastenholz, 2009).

Several authors mention the importance of this procedure (Alant & Bruwer, 2004; Costa & Kastenholz, 2009; Nella & Christou, 2014) for the settlement of a proper positioning strategy.

Nonetheless, according to Jitareanu (2012), there is no such thing as a customer or market-type for wine, as these are very influenced by the demographics, psychological and situational factors under which wine is consumed. The author also emphasizes that the true need resides in analyzing the positioning of wineries and distribution channels.

The crucial aspect is that a wide range of experiences need to be available for people: through education about wine, its region, the opportunity of collecting related items, shaping the perception of the product being promoted, associating wine to food by incorporating it with the regional gastronomy (enhancing opportunities for contact with the product itself and raising interest on it). The role of the surrounding landscape is also extremely important on the overall conception of wine tourism, with the human contact and guest relations complementing the touristic journey.

Thus, on site and off site motivators set the main drivers that take wine tourists to these specific regions (Barber, Donovan & Dodd, 2010).

As for investments, Outreville & Hanni (2013) name locational determinants, also called pull factors, as the main responsables for attracting investors. These include looking for new customers, accessing key factor inputs, reducing production costs and acquiring new brands.

2.2 International Promotion

2.2.1 Image Promotion

Marketing is crucial when the aim of reaching other customers and countries is set. Planning, pricing, promotion and distribution make the combination of what it takes to grab the existing opportunities in the market.

In the specific case of wineries, marketing mix includes the strategies to promote and distribute a single wine or its entire line. Tourism may take a crucial role in this process, whether it is in retaining new customers or gathering new businesses (Barber, Donovan & Dodd, 2010).

According to Olmos (2011), the brand is the most valued attribute by foreign wine consumers and so, using it as a way of promotion, is an effective way to reach markets across borders.

Also, customized customer service and premium benefits, like membership cards, special wine events, special admission hours or days for groups could be useful for different sorts of clients (Nella & Christou, 2014) as well as triggering Word of Mouth (Batra, 2008).

2.2.2 The Portuguese Wine Case

There is a positive value in the Portuguese trade balance in what concerns wine exports. The relationship between production and imports is one of the highest globally (Simões, 2008). 70% of Portuguese wine production has an international destination, leading to 576 million euros of profit in 2011 (AgroGes, 2012). Comparing to other agro-food products, this one is 4 times higher in its productivity level.

Nevertheless there is still more to be done as funds meant to promote and internationalize the wine sector have not been fully used.

The Portuguese wine sector has been betting on increasing the notoriety of the brands “PORTUGAL” and “Wines of Portugal” as a way of internationalization, and investments in tourism and leisure sectors make part of this strategy (AgroGes, 2012).

According to Instituto da Vinha e do Vinho (2014), the top exporters in terms of volume have been Angola, France, Germany and the United Kingdom, whereas in terms of value France has the leading position and the USA appears as the 4th biggest buyer of Portuguese wine.

2.2.3 The Role of Tourism on Promotion and Exports

Tourism can contribute to increase the number of exports as it allows tourists to acknowledge the region and its products. The visit to a wine region may be led by the desire of tasting and buying wine and learn more with the experience, so the link between wine production and tourism is highly valuable for the trade balance (Brown & Getz, 2005; Correia, 2005) and it can have a long term effect on the economic growth and development of a region (Carmichael, 2005; Fischer & Alana, 2009).

Wickramasekera & Bianchi (2013), in their research about the Chilean wine industry found that around 67% of its revenue came from export markets and in the general context of the economy this is valuable for the increment of standards of living, employment and companies' profits. The authors also observe that, apart from marketing, financial or price advantages, managerial attitudes, internationalization strategies, level of education and expertise from the export managers, level of international experience and risk aversion are crucial factors to enter new markets.

Yet, these authors, having such an extensive analysis on the wine industry and their entrance in foreign countries, never mentioned the role of tourism on promoting Chilean wine to exporters.

2.3 Research Questions

In order for the number of exports to increase people must be aware of the product and know about its characteristics and outstanding quality. Hence it is relevant, referring to the country where this research is being conducted, to pose the following research question: What tools are used to promote the Portuguese regional wine internationally?

In this study, the focus will be on the significance of wine tourism as one of these tools, as there is the need to better understand its real relevance on the wine business.

Through the literature analyzed, wine tourism can be seen as the combination of actions and experiences that increase the knowledge about the regions, its products and producers. Nevertheless, one can state that there are lacking insights of what can be done to intensify the awareness of this type of tourism to foreign markets, and no study approaches the demand of the corporate segment towards these regions on the search for business opportunities.

Because of this, it is important to pose the research question: What features characterize the wine tourism? Taking an exploratory approach, the intent is to develop a consistent hypothesis and propositions (Yin, 2009) that help understanding wine tourism and what takes

visitors, and investors more specifically, to travel to these regions and take part in these activities in detriment of other destinations.

3. METHODOLOGY AND DATA COLLECTION

3.1 Research Approach

As initially mentioned, from the analyzed literature, it was revealed a space for further investigation.

Hence, this study was based on inductive and deductive reasoning as means of completing information by using accurate and testable data (Eisenhardt & Graebner, 2007) collected with the intent of developing and testing the hypothesis suggested on the Literature Review.

The approach adopted for this investigation was a Case Study. This method allows us to understand the changing aspects of a specific phenomenon under single settings (Eisenhardt, 1989).

Moreover, its methodology allows the combination of several sources of data collection that can rely upon quantitative and qualitative analysis (Eisenhardt, 1989), that gather and provide information from a variety of sources of evidence (Yin, 2011), which together provide complete and diverse bases of information.

According to Yin (2009), defining the research questions is a very important step that needs to be made in the beginning of the research as a way to conduct the study throughout the entire process. Hence, the three research questions were stated initially and have, globally, the intent of carrying an exploratory approach towards the conclusions of this case.

The broad topic relies on the Portuguese Wine Industry and its internationalization strategy which is decomposed in three research questions: the first two expose the reality of wine tourism and other tools being used for wine promotion internationally and the last one exposes the Case Study.

3.2 The Vinho Verde Case Study

'How is the Vinho Verde route characterized nowadays?' is the third research question that captures the foundation for this research and the main interest answer (Yin, 2009).

Thus, it is relevant to understand to what level of development the Vinho Verde route has reached and how it works for the goal of increasing its awareness and potentiate its sales volume.

By taking this exact case we are revealing our appropriate sample which suits for illuminating and extending the logic around the broad research topic (Eisenhardt & Graebner, 2007).

Brown & Getz (2005) suggested in their study about the preferences for the choice of Wine Tourism Destinations that routes should be examined, its linkages and country or regional combinations. Hence, this thesis thrived to better understand the specific role of the Vinho Verde route on the promotion of its wine.

The choice of the Vinho Verde was made on the fact that it is a unique product in the world and for this, it should have a special recognition worldwide. Also because academic studies on Wine Routes never approached the Vinho Verde route. Moreover, the information available about this route dates from 2006 and there was an interest in finding out what, in 10 years, had changed.

A branded wine region is, according to Alant & Bruwer (2004), “*a bounded geographic location with inherent wineries/cellar doors profiles, vineyard landscape and other attractions*” (p. 32).

The Vinho Verde Region is the biggest in Portugal and one of the biggest in Europe, with 34.000 hectares of vineyards and it is located on the far north of Portugal. It has 9 sub-regions (see Appendix 1: The Vinho Verde Region and its Wine Trails) and it is composed by 10 wine trails.

In what concerns international trade, 42% of the Vinho Verde produced in Portugal is exported, and this value has been increasing since 2003. (ViniPortugal, 2015)

For the year of 2016, ViniPortugal had as main focus for the Vinho Verde region to grow in sales and reputation in external markets, focusing in organic markets.

Regarding promotion, besides being present online there is also a big investment for the participation in worldwide events, namely in Brazil, Europe, Japan, USA and Canada.

Throughout 49 municipalities, there are 16 different themed routes that offer different types of attractions ranging from visits through simple landscapes to Vinho Verde production.

This route is composed by farms, around 56 wineries (Rota dos Vinhos Verdes, 2003), restaurants, hotels, touristic entertainment and sightseeing, with the common goal of promoting the Vinho Verde, typical of the Minho region and solely produced there (Rota dos Vinhos Verdes, 2016).

3.3 Data Collection

According to Eisenhardt & Graebner (2007), there can be a variety of data sources in order to elaborate a proper case study. Taking this into consideration, three methods were used for this research.

First, literature-based sources were important to provide a relevant conceptual framework, mainly for perceptions as the wine tourism, marketing strategies, consumer behavior, preferences and determinants for exportation.

Second, an analytical analysis was of the utmost importance to better assess quantitative performance factors in the wineries that compose this route. Hence, a survey was sent, by email, to 132 wine sellers of this region as a way to obtain more information about their association with the route, their foreign visitors and their purchase patterns. This survey was also relevant to determine the relationship these wineries created and kept with international markets, the level of development of their international sales, the segments of tourists they received in terms of origin and visiting motives, if they had online and retail sales and in what countries and retailers were their wines being commercialized.

The questionnaire was translated to Portuguese, English and French, as the participants were from different nationalities (See Appendix 4: Survey for Wine Sellers).

Also, since the Vinho Verde is specific from the north region of Portugal and in nowhere else this wine is produced, there are some similarities with the French wine made in the Champagne region. As such, this survey was sent to 260 wine sellers from this region, as a way to establish a benchmark between these two, and to verify how different they were in terms of development, performance and international promotion.

The goal of having a multiple-case study was to provide some quantitative evidence that is more compelling (Yin, 2009) robust, generalizable and testable (Eisenhardt & Graebner, 2007).

Present on UNESCO's world heritage list, the champagne region is divided in 5 sub regions (Reims, Epernay, Vallée de la Marne, Côte de Bar and Coteaux Vitryats) (See Appendix 2: The Champagne Region and its Wine Trails) that totalize around 33.700 hectares of production and 300 Champagne houses (Comité Champagne, 2015). In all of these areas there are routes and several programs to discover the main local attractions and its typical wine (Comité Champagne, 2016).

Apart from tasting and visiting wineries, these activities go from guided tours, Segway trips, cycle, bus and boat tours, motorcyclists' special itineraries, lodging programs and geocaching (Office de Tourisme Reims, 2016).

Furthermore, there are specific visiting programs for corporate and media visitors which include visiting plans prepared for shorter and longer stays in the area (Le Comité Champagne, 2015).

Excel was used to do the analytical analysis focusing mainly on the averages of the answers obtained from the surveys, followed by the comparison between the two countries.

Moreover, combining quantitative with qualitative methods proved to be a proper tool to circumvent any limitation that might be present in surveys, as interviews provided an opportunity to expose wider perspectives on the problem under research (Kelle, 2006).

Yin (2009) reveals that case studies, compared to historical studies, have the ability to add other sources of evidences such as interviews. Thus, in depth interviews with 8 wine specialists and connoisseurs granted a more extensive and qualitative analysis to the level of development and internationalization of Portuguese wines and regions.

The criteria for the wine stakeholders' selection was based on their experience in the industry, their contact with the Vinho Verde market, and their knowledge of the subject under research.

From tourism journalists, wine exporters, wine tourism managers and representatives, the goal was to focus on the research questions and develop them through intrinsic issues, obtaining a multidimensional feedback from these experts.

According to Eisenhardt & Graebner (2007), the key approach is to use numerous and knowledgeable informers that can characterize the focal phenomena with several perspectives. These individuals can have different levels of hierarchy within the industry or even be from different functional areas, groups or regions, amongst other factors that can grant a multidisciplinary on the perspective being provided.

Hence, the wine stakeholders that were interviewed were the following:

1. José Arruda: General secretary of Associação dos Municípios Portugueses do Vinho (AMPV) and representative of Associação das Rotas de Vinho de Portugal (ARVP);
2. Filipa Lopes: Bacalhôa and Aliança Wines¹ Public Relations;
3. Carlos Ferreira: Representative of the Oporto and North Regional Tourism;
4. José Luís Elias: Journalist and Director of *Destinos* Tourism Newspaper and *Turisver* Hospitality Magazine;

¹ Bacalhôa and Aliança are two wine brands that sell Vinho Verde

5. Isabel Domingues: Representative of Melgaço Municipality and Person in Charge for the Alvarinho Route's Technical Bureau;
6. Miguel Sarmiento: Wine and Gastronomy Representative in Turismo de Portugal;
7. Pedro Araújo: Vinho Verde Producer/Seller and Owner of Quinta do Ameal (Wine Tourism).
8. Nuno Vale: Marketing Director of ViniPortugal.

All the interviews were done in Portuguese, some of them were made personally, others had to be done by telephone due to distance limitations, and they were based on asking for professional opinions and suggestions of what could be done or was already being put in practice to better promote the Portuguese wine abroad (see Appendix 3: Interviews with Wine and Wine Tourism Stakeholders).

Although 8 interviews were made, only 3 transcriptions are shown in appendix, as the remaining participants did not give, in due time, their consent on the publication of the transcript with their point of view. Because of this, just the interviewees that authorized the publication were mentioned on the Results Analysis. All other stakeholders were identified as informers.

So, the table below summarizes all the sources of information that were used to gather data and evidences for the conclusions' drawing.

Sources	Vinho Verde Region	Champagne Region
Responded Surveys	20	84
Interviews	8	
Official Documents and Statistical Reports²	4	3

Table 1: Information Sources

3.4 Criteria for the Quality of the Research Design

With the research strategy adopted, the aim was to abide to the four criteria for judging the quality of research design, listed by Yin (2009): *construct validity*, through the use of multiple sources of evidence and asking key informers to review the summary of their interviews to avoid miscommunications; *internal validity* by trying to find, in the results' analysis, patterns, building explanations and stating the evolution on performance throughout the time of wine tourism and wine promotion in the different agents that were surveyed during

² The official documents are referred in the Appendix list.

the research; *external validity* through the benchmark with the Champagne Region in order to assess if the reality present in the Vinho Verde region can be extended and observed in other locations that have similar conditions in terms of type of activity and product development; and lastly *reliability*, by doing the transcription of all the interviews (see Appendix 3: Interviews with Wine and Wine Tourism Stakeholders) and creating an updated database with all the information contact of the agents that were approached on the several methods conducted for this research as well as a calendar of the several interactions established. The goal of this is to show ways to minimize errors and biases in further studies, by allowing other investigators to repeat the same methodology adopted for the construct of this thesis.

After gathering the aimed information through the proposed methods I followed with the cross-analysis of the data, with the purpose of finding common patterns between the results conveyed on the surveys and the insights obtained through the specialists' explanations, as well as doing the comparison between the results of the Champagne and the Vinho Verde Regions.

4. RESULTS ANALYSIS

4.1 The Experience around Wine Routes

Wine routes allow tourists to be in contact with the region, its natural resources and other features related or not to wine production.

The main strengths that the interviewees named were the capacity to expose the region's characteristics, giving knowledge about the wine, terroir and other activities available in these regions such as shops, handicraft, visiting museums or restaurants. Also the contact with wine tourism before and/or after knowing the wine and the area was something pointed as truly valuable.

According to informer 3, wine routes are not just about wine, as the main purpose is to sell the region and its attractions, opinion also shared by informer 2.

A diversified offer is what grants the success on these routes. Its maintenance involves high costs and investments that many associations are not able to keep, leading many of these trails to extinction or inactivity. The idea behind the assembling of these routes didn't often comprise the financial efforts that these demand and so, for many of them the current status of activity is poor or inexistent.

Informer 1 told that wine tourism projects should be an independent business and profitable on its own, otherwise it is just an appendix to organizations and, up until the date of this study, did not constitute an appealing offer with quality.

Informer 2 and Mrs. Isabel Domingues referred that nationally, the routes in Bairrada, Palmela and Setúbal are the best ones due to the dynamism they have, characteristic that Mr. Carlos Ferreira pointed as crucial for a good performance on a wine route.

When mentioning notoriety, the Vinho Verde route was also referred by Mrs. Filipa Lopes and Mr. Carlos Ferreira due to the exclusivity of the wine being produced there, which stands out internationally when comparing to other types of wine.

Regarding the Portuguese wine in general, the Douro region is one of the most known, according to informers 4 and 5. For them there are not wine routes that are more famous than others in Portugal, what in fact exists is the Douro region in terms of international recognition, and wine routes are just a minor product within it.

As for the main weaknesses, besides the ones already mentioned, the shortage on technical resources, training and funds for promotion led by the individualism of each route and its defragmented offer makes it a product that, according to Mr. Carlos Ferreira, is somewhat outdated and that visitors take just by passage, almost never completing it.

4.2 Demand over the Portuguese Wine Routes

Comparing international and national demand, informer 2 stated that wine routes are meant for both, and demand for wine routes is made in equal proportion between nationals and foreign visitors (Turismo de Portugal, 2015).

Specifically analyzing international demand over wine regions, this one was dominated by Brasil (45%) followed by the United Kingdom, Germany and France (43%). Moreover the USA had been growing considerably in terms of wine tourism's demand for the past years, according to Turismo de Portugal (2015), a fact also revealed by informer 3.

About the season where demand peaks, summer months of July and August are very important, but September, due to the grape harvesting period, is the month with the biggest flow of tourists to wine routes (Turismo de Portugal, 2015).

The major traits of the demand over wine regions is that it is made by people that know and appreciate wine, with a high purchase power and these are not mass tourists, as informer 3 explained.

4.3 The Wine Routes' Role on Portuguese Wine's Visibility

Regarding the visibility of the Portuguese wine due the Wine Route's activity and promotion, the most common opinion was that there is not a crucial contribution but a somewhat significant one, in the sense that a wine route provides the opportunity to be in contact with the region and its wine.

Informer 1 and 4 shared the opinion that there is not any contribution by the wine routes on this aspect.

According to informer 3, this experience may represent an opportunity for wine stakeholders or just enthusiasts to show others through media or written articles the potential of these regions. For instance, the presence on UNESCO's list is a powerful tool for wine tourism promotion across borders which can have a significant impact on the wine being produced and sold from these places, increasing either direct sales or exports.

The demand for places to eat, wineries to visit and activities to do is increasing, as Mrs. Isabel Domingues stated, and what really matters is the ability to provide a good experience that people may try to replicate at home, or even promote to others once in their home country or town, leading this way to the increment of the demand over the wines and the region.

Mr. Carlos Ferreira also pointed that these routes are a showcase of the region and a front-office of knowledge about its products, which can benefit the awareness on Portuguese wine itself.

In order to increase these routes efficiency in promotion, Mr. Carlos Ferreira and some other informers agreed that an aggregation of routes would be beneficial, in order to increase the number of associates and its critical mass on the routes' performance. Also an Iberian partnership to raise awareness about Portugal, side by side with Spain, where the development level in terms of wine tourism is much superior, would be an important step.

Informer 4 also suggested the presence in international fairs, simple and effective communication and take part in several wine trails, apart from wine routes.

4.4 Promotion on Portuguese Wine vs. Promotion on Wine Routes

In what concerns promotion of the two products, there is a considerable difference between Wine and Wine Tourism.

The more investment a route has, the bigger its visibility and its regional wines. Mrs. Isabel Domingues mentioned that a good promotion on wine routes contributes to its wine's international exposure.

However, the lack of funds for promoting this sort of tourism makes it much more focused on the national market and on the proximity tourism coming mainly from Spain.

One adversity of wine routes, according to informer 5, is that in order to explore it one must have its own vehicle, as there are no programs or tours associated to these which allow tourists to go from one end to the other without major concerns.

Moreover he commented that a big portion of tourists arriving to Portugal comes by plain and not having a private car is a limitation that many of them would face if they looked for a wine route.

He also pointed out that the major focus on Portuguese tourism promotion is sun and beach, Oporto, Lisbon and informer 2 referred that there is no capacity for Regional Promotion outside. Every sort of international promotion for wine regions was made under the umbrella of Turismo de Portugal or Major Regional Tourism Associations.

Participation in fairs and wine events started to happen, through ARVP but still on a national scope as international campaigns are very scarce.

The AMPV is closely linked to ARVP and both were starting a plan to revitalize and provide dynamism to most of the wine routes. These associations created the European Letter of Wine Tourism (see Footnote 6), in which all the associated firms must abide to a set of standards in order to better promote the region and optimize its tourism performance based on a sustainable strategy.

Apart from these institutions the interviewees also mentioned Municipalities, Regional Agencies for Tourism Promotion, Instituto da Vinha e do Vinho (IVV), Travel Agencies, Tour Operators and local producers as the main responsible for wine tourism development and promotion. Mrs. Isabel Domingues highlighted the potential of Aenotur³ that, if it develops a proper work, will be a major pillar for international promotion as it is composed of agents coming from Latin America and some European countries.

As for the wine itself, ViniPortugal is the major entity that contributes for the recognition of the Portuguese Wine abroad.

However, and according to informer 1, Wine Tourism is not under ViniPortugal's scope. He added that Turismo de Portugal is the organization that takes care of this.

In 2014, there was a partnership between these two organizations to promote wine tourism abroad, namely in the USA, Brazil and United Kingdom. Nevertheless due to legal constraints this project was aborted and up until 2016 this type of projects were never recreated.

³<http://www.aenotur.org/>

Hence, promotion for 2016 sets on 47 national and international events which include exclusively tastings, fairs, wine presentations and third parties' events (ViniPortugal, 2015).

Mrs. Isabel Domingues also remarked the immense work of wine producers themselves, their participation in wine fairs, their sales effort and other promotions done entirely with their resources and investments, which somehow gives recognition to the area where the wine is being produced.

Mrs. Filipa Lopes complemented that importers are, as well, an important sponsor when international promotion on wine is concerned, opinion also shared by informer 4.

4.5 The Vinho Verde Route

Serving as a foundation for this research, it was relevant to understand to what level of development the Vinho Verde route had reached and how it worked for the goal of increasing its awareness and potentiate its sales volume.

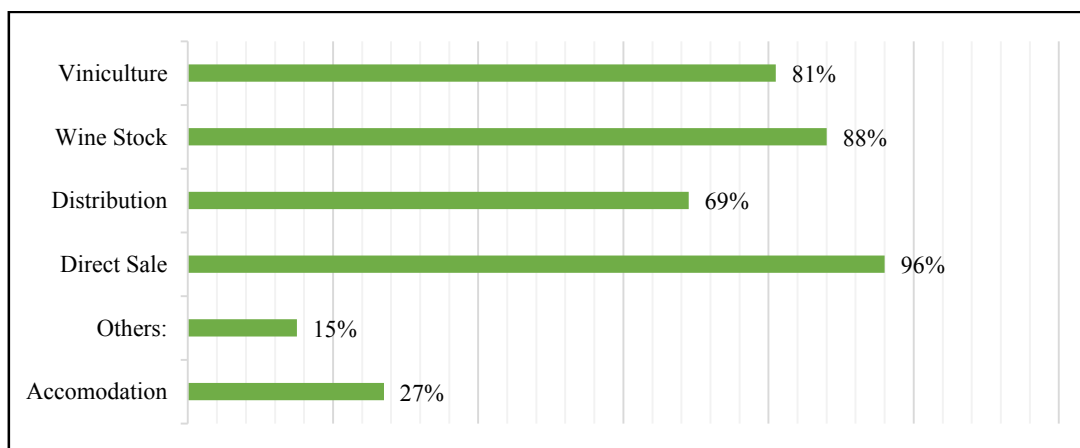


Chart 1: Main economic activities of the Wine Sellers in the Vinho Verde region

Regarding the main economic activities explored (see Chart 1), the results of the survey showed that 96% of the agents was selling their wine directly, 88% was also in charge of its stock and 81% was harvesting and transforming grapes into wine. A big portion (69%) was also doing the wine distribution to its whole and retail sellers.

The Vinho Verde is being widely promoted throughout the world, with the co-joint cooperation between Comissão Vitivinícola da Região dos Vinhos Verdes (CVRVV) and ViniPortugal.

Almost half of the Vinho Verde produced is exported and USA, Germany and France are the biggest buyers (ViniPortugal, 2015).

This information was aligned with the data obtained through the survey as North America, Germany and also the United Kingdom were the most referred destinations. Also, from all the respondents, 68% had their wine being sold in international retailers.

Nevertheless, when asked to the Vinho Verde agents the main purpose of the wine bought in their facilities, the majority was meant to Hotels, Restaurants and Coffee Shops in Portugal, followed by self-consumption, exports, super and hypermarkets, respectively. Wine bars and warehouses were other options mentioned by some of the respondents.

The strategy for 2016 is to promote the Vinho Verde as a unique product, increasing its value as a brand, defending its national market share and grow in international notoriety and sales.

The investment budget for this year is of 3.000.000€ and it is meant to be distributed on three major initiatives: the first is the promotion on the Denomination of Origin (D.O) of Vinho Verde, on the Geographical Identification (G.I) of the Minho Region and its route; secondly advertising the brands of all the economic agents enrolled in the Vinho Verde production and thirdly, direct promotion to consumers of all the distributed brands in the retail industry (ViniPortugal, 2015).

Within the Vinho Verde Route, informer 3 praised the good development of the Alvarinho Route, created in 2008 in the region of Melgaço and Monção, located on the border of Portugal with Galicia where there is a partnership between Alvarinho and Ribeiro (in Galicia) routes in order to better promote wine tourism for both.

Nevertheless it is still much focused on national customers, as they are still trying to set their internal organization which, according to Mrs. Isabel Domingues, can be viewed as a weakness as well.

The Vinho Verde route is managed by CVRVV and the Alvarinho Route is privately held by the municipality of Melgaço, working closely with AMPV and ARVP on a development strategy.

Being present in an excellence wine's territory, these two routes do not work together, as they have different meanings of wine tourism. According to Mrs. Isabel Domingues, CVRVV is focusing on promoting wine through all sort of events and wine tourism, whereas for the Alvarinho Route Wine Tourism is more focused on the overall experience provided to visitors, being wine just one of the components.

Following the European Letter of Wine Tourism standards (see Footnote 6), the Alvarinho route establishes regular contact with the Bairrada route to change ideas and strategies, in order to reach the development level and dynamism that this last one has.

Moreover, being part of this region is a potentiality that is not yet well enjoyed due to the big fragmentation of the existing offer and a poor structure in terms of tourism.

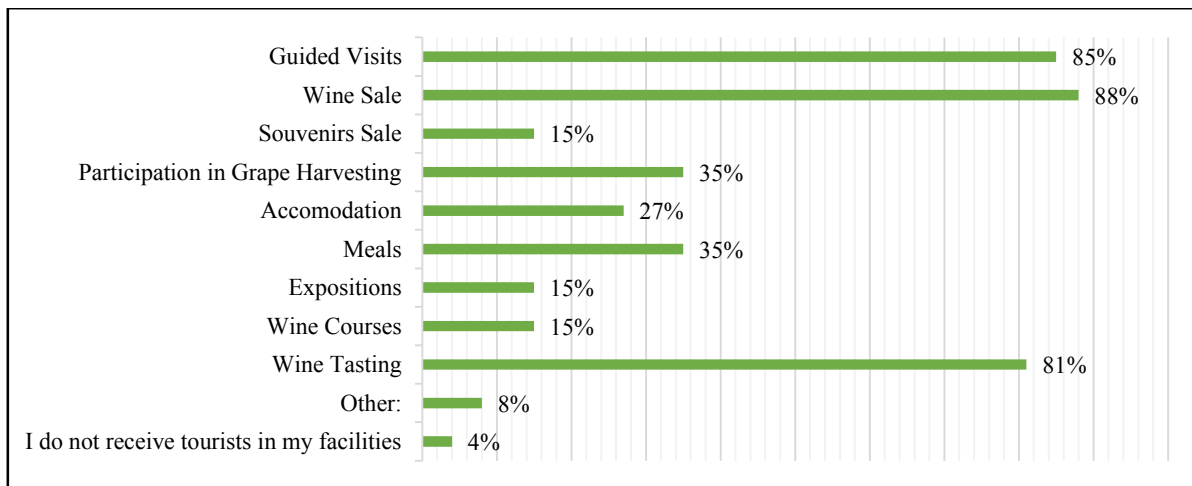


Chart 2: The Tourism Offer by the Vinho Verde Agents

According to Chart 2, more than 80% of the respondents focused on providing wine tastings and sale as well as guided visits. A more complete offer was made available by a smaller portion that also allowed for tourists to participate in grape harvesting (35%), was serving meals (35%) and providing accommodation (27%).

Expositions, wine courses and souvenirs sale were also available in 15% of the respondents' facilities.

Only 4% said they didn't receive tourists in their facilities.

Albeit the increasing recognition of the Vinho Verde worldwide, this effort came from the producers' responsibility as the Alvarinho route and the Vinho Verde route contribution for this was almost nonexistent due to the practically exclusive national focus, according to Mrs. Isabel Domingues.

Still, the aim is international promotion, but this is just a second step after reaching the proposed initiatives on the national level.

As for tourism development in this region, according to Mr. Carlos Ferreira, Associação de Turismo do Porto e Norte (ATPN) and IVV are also two other institutions that helped local producers on this effort. Informer 3 also complemented that CVRVV also takes part on this work.

On the contrary, informer 4 told that from his experience, CVRVV's contribution does not exist and ATPN and ViniPortugal are the most important entities, organizing visits for wine agents and journalists to wine facilities.

The results of the survey showed that 59% of the respondents had help from other organizations in promoting their business. ViniPortugal and CVRVV were the most referred,

followed by travel agencies and tour operators from this region, Fenadegas⁴, among other regional agents.

Moreover, 77% of the respondents did or was currently doing investments for international promotion and sale.

Although Mrs. Filipa Lopes and Mr. Carlos Ferreira pointed the potential of the Vinho Verde route for the best performance in wine tourism, informer 5 explained that even in international fairs, like FITUR in 2016, there was no reference of Wine Routes anywhere and if people wanted to know more about these it was in Turismo de Portugal or Porto e Norte that they could be enlightened about its attractions.

Despite of the survey showing that 86% of the agents participated in international promotion events, the aim was to promote their wine production and not the route.

As far as motives for visiting, demand over this region was made, especially, with the leisure purpose, followed by the business segment composed by wine professionals; tourism agencies and tourism companies represent the third place and journalism, sports and field trips are examples of other motives ranked by the agents.

Concerning the number of visitors, these values varied immensely from company to company and depending on the time of the year, whether if it is harvesting season (considered the high season), where on average wineries received around 206 visitors monthly, or not (lower season), where this number decreased to 52 people per month (see Table 4).

From all the visitors received, 58% were Portuguese whereas 42% were foreign visitors. The main nationalities that looked for the Vinho Verde route, apart from Portugal, were France, Spain and England.

Country	France	Portugal	Spain	England	USA	Netherlands	Brazil	Germany	Japan	Russia
%	19,4%	16,1%	14,5%	14,5%	8,1%	8,1%	8,1%	8,1%	1,6%	1,6%

Table 2: Main nationalities of the visitors in the Vinho Verde region

When asked about the development of the international demand over their facilities, 55% of the respondents claimed that this one had been increasing, 18% argued that it had remained equal and 14% said it had been decreasing. Also 14% identified that there was no international demand over their facilities, which shows that the level of development, the

⁴ Fenadegas: Federação Nacional de Adegas Cooperativas.

dimension, type and diversity of the offer to visitors affects substantially the interest over these local businesses.

From all the visitors these firms received, 68% normally bought their wine and 84% of the agents told that the demand over this one had been increasing, whereas 11% said it had remained equal and 5% stated it had been decreasing, showing this way, that demand over the wine was more frequent than the demand over the facilities with a visiting intent. As Chart 5 shows, the decreasing interest over facilities was bigger than over the wine, and the same phenomenon for the stagnation of demand. Some agents (14%) even mentioned that foreign visitors do not look for their facilities.

In what concerns the purchase of wine, 38% of the regular buyers were international, and the main sources of obtaining customers were the presence in fairs and promotional events, followed by contacts established directly with the customers as well as through third parties. Visits to the agents' facilities was the 3rd most common motive and agents also mentioned that being proactively contacted by their customers was also a considerable mean of raising buyers (See Table 6).

As for online sale and promotion, 89% of the respondents advertised their business in social networks, but only 28% had an online sales platform, from which no agent was satisfied with its sales volume.

Portugal and Spain were the main destinations of the online sales.

Please rate the level of impact that the Wine Route has had for the recognition of the wine you sell/produce: "The Wine Route has contributed to the recognition of my wines"					
	Nonexistent	Short	Moderate	Big	Very Big
On a national level, the impact was	10,5%	26,3%	57,9%	5,3%	0%
On an international level, the impact was	31,6%	10,5%	47,4%	10,5%	0%

Table 3: The impact of the Vinho Verde Route on the Vinho Verde Business

From all the surveyed agents, 63% were associated to the Vinho Verde route. Concerning the impact of the wine route on their wine business, the majority agreed that being part of the wine route was beneficial and it was an opportunity to receive more foreign visitors. However, when it comes to selling more wine opinions were almost similar between feeling a positive impact (45%) and not experiencing any benefit (40%) (See Table 7).

Also, exports did not seem to be affected by the association to the wine routes. This idea goes in line with what informer 4 told, mentioning that what may happen is the indirect export from foreign visitors that buy the wine directly, take and consume it in their home country and

afterwards start looking for this product in retailers or online but, as he mentioned, this phenomenon is very residual.

Lastly, Table 3 shows that in general both internationally and nationally, the contribution of the wine route for the wine’s recognition was moderate, with 47,4% and 57,9% respectively. This is emphasized by the fact that none of the agents considered that the impact was very big and specifically on the international scope, 31,6% even thought that it did not affect their wine’s recognition.

4.6 The Champagne Region: a benchmark

According to the 84 respondents, the year of the beginning of the activity ranged from the 18th century to 2015, being the majority of them from the first half of the 20th century.

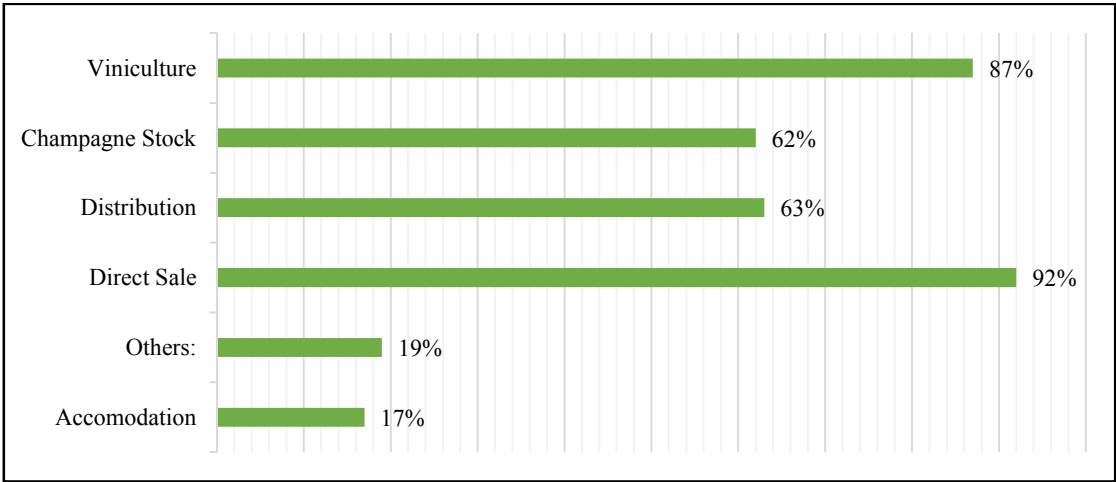


Chart 3: Main economic activities of the Wine Sellers in the Champagne Region

Regarding the activities developed within their facilities, more than half was taking care of the entire value chain associated to the Champagne business, with 87% of the respondents doing viniculture, stock (62%), distribution (63%) and 92% was also selling their champagne directly.

Other activities mentioned by the agents included exports, museums, guided visits and wine tourism.

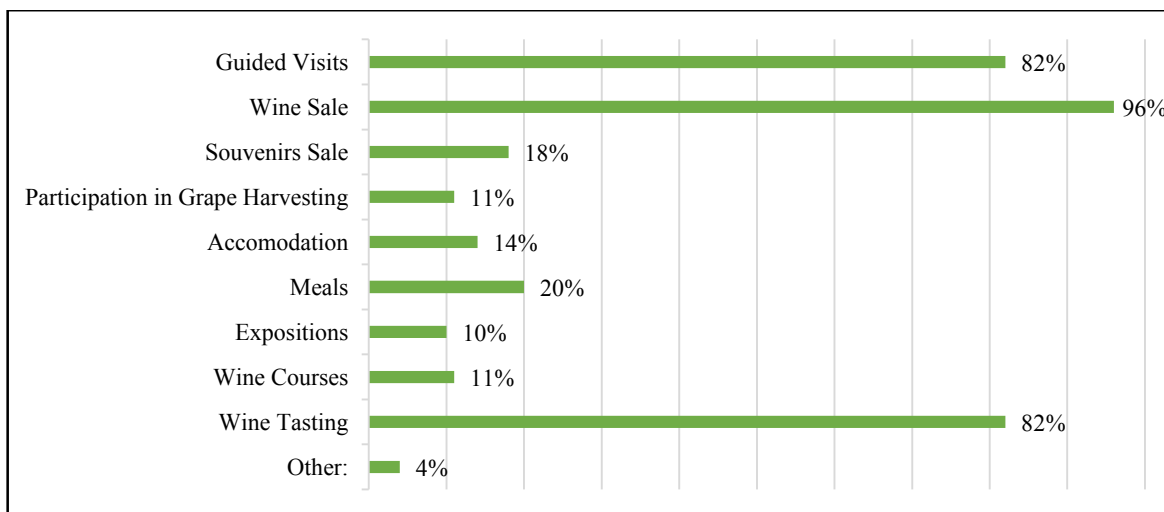


Chart 4: The Tourism Offer by the Champagne Agents

As for the offer to tourists the most common activities were champagne selling (96%), champagne tastings (82%) and guided visits throughout their facilities (82%). Selling accommodation, meals and souvenirs were also other activities explored by these companies, whereas 2% mentioned that they did not receive tourists as part of their business.

On average the demand over this region was from 80 to 180 visitors per month on lowest and highest demand seasons, respectively. However, and similarly to the Vinho Verde agents, this value varied significantly between the agents as the years of experience, the dimension of the firm and the variety of activities developed also diverged expressively between them. As Table 4 shows, some companies received few customers during the seasons with lowest demand, as opposite to others that mentioned that they received around 1500 customers. In high season, minimum and maximum values tripled but on average demand surpassed the double of the low season.

Comparing with the Vinho Verde region, we see that values did not differ much except for the maximum number of visitors that are affected by the other characteristics already mentioned. In highest demand season the average value of people interested about Vinho Verde even exceeded the Champagne's average by almost 30 individuals.

Demand Seasons								
	LOW SEASON				HIGH SEASON			
	Min	Max	Ave.	Std.Dev	Min	Max	Ave.	Std.Dev
Champagne	1	1500	80,0	205,3	3	3000	178,883	406,514
VV⁵ Region	0	800	52,455	168,587	2	2000	206,227	459,509

Table 4: Number of visitors per month in the two regions

⁵ VV: Vinho Verde

Analyzing the reason for visiting these wine sellers, the most common motive was leisure, followed by business as the second most important. Inside this category, the tourism industry came first, represented by travel agencies and tourism activities. Wine business was the third motive on a scale from 1 to 4, where the remaining activities, mentioned also as reasons, were mostly regular purchases, tastings, weddings and field trips. Here we can compare and realize that tourism agents may have had higher relevance within the business segment rather than wine agents, as opposed to the Vinho Verde region.

Comparing national towards foreign demand over the Champagne wineries this distribution was represented by 57% of international visitors and 43% of French visitors. This international demand, according to 68% of the respondents, had been increasing. For 27% of the participants it was a reality that remained constant throughout time and 5% stated that they did not have international demand over their facilities, as Chart 5 shows. Again, the dimension, level of experience and services provided influenced these results.

Lastly, none of the respondents noticed a decreasing interest on behalf of foreign visitors.

On total, there were 17 nationalities named as the most popular amongst the visitors of these Champagne agents. According to Table 5, Belgium, United Kingdom and Germany were the 3 main foreign nationalities that looked for the Champagne region, representing respectively 31,98%, 18,92% and 9,91% of the total demand. This shows that geographical proximity can be a crucial factor, as the highest percentage came from the closest countries to France and to the Champagne Region, more specifically.

Of all the visitors they received, on average 88% also bought their wine during the visit, which represented a positive outcome in terms of sales both for national and international markets.

Country	%	Country	%
USA	7,21%	Luxembourg	0,90%
Belgium	31,98%	Denmark	0,90%
Sweden	5,41%	Australia	0,45%
France	9,91%	Brazil	0,45%
Netherlands	7,21%	Colombia	0,45%
United Kingdom	18,92%	Austria	0,45%
Switzerland	0,90%	Portugal	0,45%
Italy	4,05%	Japan	0,45%
Germany	9,91%		

Table 5: Main nationalities of the visitors in Champagne

As for the exports, 51% of the surveyed had their wine being sold internationally, where USA, Japan, Belgium, restaurants and retailers on other bordering countries where the most mentioned among the agents.

In what concerns the international demand over their wine, 73% claimed that this one had been increasing and 21% affirmed that it had remained equal. In 6% of the agents there was no international demand.

Chart 5 compares the two scopes of international demand, showing that similarly to the Vinho Verde region, the demand over wine had been increasing in bigger proportions than the demand over wine facilities. Nevertheless, these asymmetries were more evident in the Vinho Verde region.

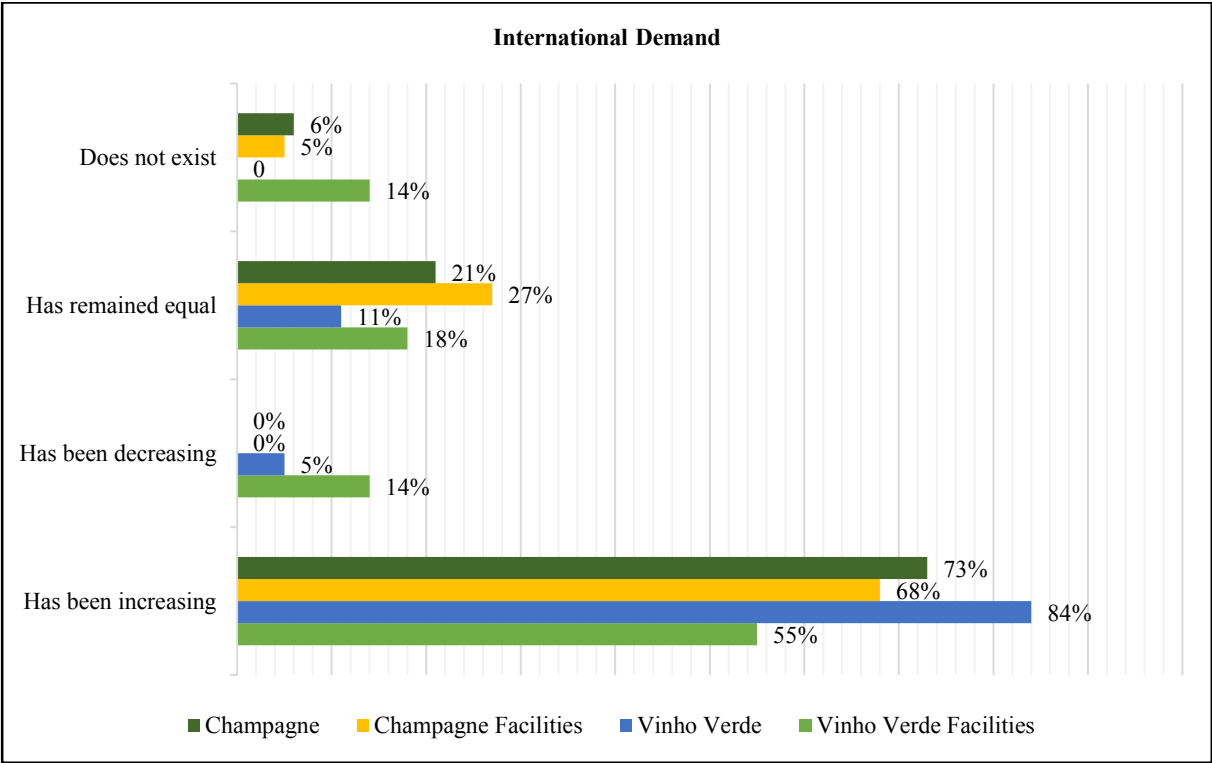


Chart 5: International demand over wine and facilities

From all the buyers that these French wineries had, 45% represented foreigners, which indicates that, on average, in this region more than half of the sales were designated to internal markets.

From the foreign buyers that you have, please rate on a scale of 1 to 5, being 1 the most frequent and 5 the least frequent, how did you establish contact with them				
Motive	Vinho Verde		Champagne	
	Mean	Rank	Mean	Rank
During visits to my facilities	2.67	3 rd	1.95	1st
Through third parties	2.67	2 nd	2.25	2 nd
During a fair/promotional event outside my facilities	1.83	1st	3.11	3 rd
I searched and established direct contact with these customers on my own initiative	3.28	4 th	3.15	4 th
Other	4.56	5 th	4.55	5 th

Table 6: Sources of Contact with Foreign Buyers

Regarding the contact established with foreign customers, visits to facilities was the main motivator, followed by other intermediaries such as restaurants, importers, tour operators and tourism offices. Participating in international fairs and events outside their business facilities as well as through proactive commercial initiatives were the other two most common motives that followed the ones already mentioned.

This clearly shows that Champagne wineries were having more success than Vinho Verde's when it comes to receiving wine agents and other clients directly in their facilities, as the effort in participating in Wine fairs revealed to be more effective for the Vinho Verde sellers.

In what concerns international promotion, 65% of the Champagne agents had already made investments towards this goal, and helping them on their business promotion there were tourism offices, travel agencies, wine clubs and associations, trade agencies, wine retailers and restaurants.

The most common purpose of the wine being sold was self-consumption, followed by exports, hotels, restaurants and coffee shops in France, champagne retailers and lastly super and hypermarkets in France.

In order to help promoting their business, social networks can be a powerful tool and online wine sales can be a source of high-end wine supply (Rocchi & Gabbai, 2013). 83% of the respondents was using social networks to promote their business online, but only 23% had online sales platform. From these, 76% were not satisfied with their online sales volume.

As for the main destinations of the online sales, similarly to the physical ones, their main end was to France, followed by Belgium and Germany.

These results were very close to the ones observed in the Vinho Verde region, as the percentages were very similar and the proximity countries were the main customers for the online sales.

Question	I don't agree		I don't have an opinion/ It doesn't apply to my situation		I agree	
	Vinho Verde	Champagne	Vinho Verde	Champagne	Vinho Verde	Champagne
Belonging to the WR is beneficial for my business	10%	5,9%	10%	5,9%	80%	88,2%
Because I am associated to the WR I receive more foreign visitors	25%	20,6%	10%	5,9%	65%	73,5%
Being associated to the WR allows me to sell more wine	40%	20,6%	15%	17,6%	45%	61,8%
My exports have increased due to my association with the WR	50%	79,4%	40%	11,8%	10%	8,8%

Table 7: The benefits of belonging to a wine route (WR)

Please rate the level of impact that the Wine Route has had for the recognition of the wine you sell/produce.					
The Wine Route has contributed to the recognition of my wines					
	Nonexistent	Short	Moderate	Big	Very Big
On a national level, the impact was	20,6%	35,3%	32,4%	11,8%	0%
On an international level, the impact was	23,5%	38,2%	26,5%	11,8%	0%

Table 8: The impact of the Champagne route on Champagne's international recognition

From all the respondents, 34 were associated to the Champagne route, and regarding the importance of this route on their level of international recognition and exports, table 7 shows that the majority of the associated agents considered this route important for their business' success as it allowed them to receive more foreign visitors and to sell more wine. However, the majority did not think that this factor was crucial in increasing the level of exports, as 79, 4% considered that it was not because of belonging to the Champagne route that their exports increased.

Table 8 describes that, both internationally and nationally, the impact felt on the wine's recognition was mainly short to moderate, as the respondents answered short 38,2% of the times for the international level of recognition and 35,3% for the national. None of the agents argued that the impact of the champagne route on their wine's recognition was very big, which showed a soft contribution of the route on sales.

5. CONCLUSIONS

Wine tourism is an opportunity to give tourists the information and a showcase about the region main attractions, such as wine, terroir and other activities. This can be a solution to increase sales and potential to the value of the product (Menival & Charters, 2013).

A diversified offer with a dynamic character is what grants the level of development and success of the wine routes within these regions, although they also represent high investment and maintenance costs.

Exclusivity of the products in wine routes is an appealing factor that allures more visitors and increases national and international recognition.

Nevertheless shortage of technical, human and financial resources are the main weaknesses associated to Portuguese wine routes, a fact also mentioned by Simões (2008) that points the multiple lacks of resources to support the routes by some of the regional wine commissions. Additionally, the inactivity of the routes and the fact that wine tourism is just a small portion of the entire tourism flow in Portugal, draws the attention from big and national tourism investors as well as other investing agents of the wine industry, diminishing its international notoriety.

Regarding the demand over wine tourism, both national and international tourists look for these regions, being the high peak during the harvesting season. These tourists do not represent masses, have a high purchase power and they know and appreciate wine.

The role of the wine routes on the international recognition of the Portuguese wine can be beneficial, however it is not crucial. It reveals opportunities to spread information through media, governmental institutions and even through the own tourists in an attempt to replicate the experience at home and with their networks.

The increasing interest over places to eat, wineries to visit and places to stay shows to be an opportunity to combine good experiences to wine sale, increasing its awareness.

As far as promotion is concerned, there is a big effort to advertise wine abroad by major organizations such ViniPortugal, IVV and CVRVV in the Vinho Verde case.

As Wu (2016) points, the importance of governmental assistance is a determinant of success in international markets. Nevertheless, there is an important role developed by the producers' own effort and investment that allows for the region where they explore viniculture also to be known. Importers have as well a presence in raising awareness for Portuguese wine, extrapolating quality references to Portuguese regions such as Douro, and going in line with the association made by Jover, Montes & Fuentes (2004) who explain that geographical location can positively impact wine purchase.

The focus is on selling wine, and the international promotion of wine routes is made under the umbrella of big wine brands or national tourism organizations as there is no power for regional promotion abroad.

Internationalization is a costly progress that discourages companies from investing abroad (Georgiou et al., 2015). Because of this, the focus at the moment of this research is national and also turned to the proximity visitor that is curious about the neighbor wine region.

In the Vinho Verde region, wine producers and sellers concentrate their business in viniculture, stock and sale, and normally offer to their visitors tastings, guided visits and the chance to take home their products.

As for the international recognition, USA, United Kingdom and Germany showed to be very interested on products coming from the Vinho Verde region and even also from Champagne, being the French equally important customers for the wine and the Vinho Verde tourism business.

The Vinho Verde Region in terms of tourism is not well structured and the definition for wine tourism varies between the wine route's agents within it, making its offer an individualist and defragmented product, with diverged concepts between them.

Despite this, foreign interest has been increasing both for wine and tourism, but due to the major concentration of efforts in exporting Portuguese wine, this product has bigger relevance and growth towards foreign demand, resulting in a large volume of international sales.

There is an evident effort in raising knowledge and interest over the regional Portuguese wine, but the partnership with the Vinho Verde route is mostly a mean to complement the offer and not to give it particular importance, as the majority of the agents considers that the effect of the wine route on their exports is not relevant, but moderately increases their international notoriety.

The same conclusion is obtained by benchmarking the Vinho Verde route with the Champagne route, which shows better awareness and diversity in terms of international demand and has even a bigger percentage of foreign visitors than nationals. It also has less disparities between the interest over the champagne and visiting the champagne facilities, but still considers that the impact of the Champagne route on their international recognition was short and that their exports were not benefited by that, although agreeing that it is an opportunity to receive more customers and to sell more wine.

Hence wine routes have a positive impact on the wine's international recognition. However, because the focus of the Portuguese wine tourism is national, this impact is moderate

and in many times not relevant internationally, which confirms the hypothesis raised initially, in the literature review chapter.

There is a moderate two-way effect of wine promoting the wine region and the reverse.

5.1 Recommendations

In order to joint efforts, funds and knowledge, there should be made an aggregation of wine routes so that its offer in terms of wine and tourism could englobe more technical and human resources that would allow for better services with more dynamism and activities. Several benefits arise from a coordinated wine marketing strategy from a regional perspective, being international notoriety, a more diverse and complete range of products and the ability to face the changing demands of customers the main ones (Rocchi & Gabbai, 2013).

For the international recognition around these regions, its producers and natural resources to increase, more capital should be made available for international promotion, like participation in international fairs, standing out with the own brand of the Wine Routes of Portugal instead of appearing sporadically under the umbrella of other regional or national associations and only in national events.

Also, because the interest on Portuguese food is gaining relevance throughout the time in terms of tourism demand, more promotion based on gastronomy should be made.

Fourthly, creating partnerships with Spanish routes would benefit Portuguese wine business and rural tourism performance as this association would create an Iberian offer, which would give opportunities for Portuguese agents to learn with its neighboring country, which is much more developed in terms of wine tourism and direct sale in wine regions.

Moreover, a better synergy between wine and wine tourism agents would allow the adequacy of both offers to different demands: since different nationalities look for different products, like Brazil that looks more for tourism activities and China that is almost exclusively focused on the beverage.

Furthermore, there should exist more guidelines and planning to discover the wine routes in Portugal. An example would be an interconnection of the information regarding all the existing routes, easily available to visitors, so that when an individual is traveling one route, he can obtain the set of procedures to have access to the others.

Finally, an elevated level of human capital and labor is important to attract foreign investors (Outreville & Hanni, 2013), and for this more training and jobs in these regions would be recommendable to create a diversified offer both in terms of wine production and activities

to make the tourist's experience more complete and suitable to different and more demanding tastes.

5.2 Limitations

The main limitations on this research were based on the reduced number of organizations surveyed, mostly in the Vinho Verde region, and the low response rate that may have a significant impact on the results if a potential outlier resides within the sample. The access to information about all the producers and associates of the Vinho Verde route was very limited and outdated, which made the research more difficult and time consuming.

A bigger sample would allow for a better analysis of the reality present in the Vinho Verde area. However being this a case study of a single region in Portugal, the number of wineries and wine tourism organizations available to study are relatively reduced.

Also, due to having such a small sample didn't allow the assembling of a proper regression that would permit to analyze and understand to which extent the entrance in the wine route membership would affect wine sales. For this, apart from a bigger sample, it would have been necessary to get time series data from all the agents to see the difference between the treated group (wine route associated) and the control group (non- associated with any route) and analyze differences in performance.

Lastly, because synergies between agents and congregations of businesses was so suggested by the interviewees during this research it would have been interesting studying the effect of joint-ventures in the wine tourism development. Still it was not possible due to time constraints and so it remains as a suggestion for further research.

6. REFERENCES

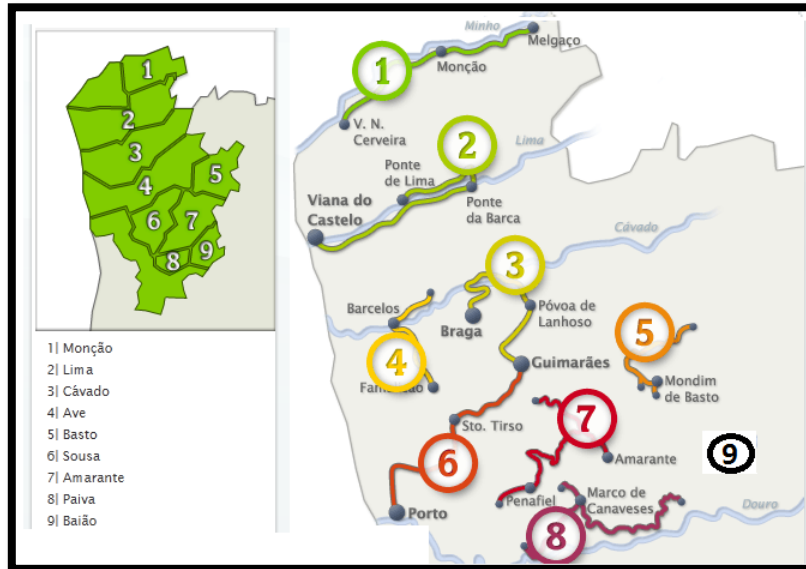
- AgroGes. (2012). *Plano Estratégico para a Internacionalização do Sector dos Vinhos de Portugal*. Lisboa: ViniPortugal.
- Alant, K., & Bruwer, J. (2004). Wine Tourism Behaviour in the Context of a Motivational Framework for Wine Regions and Cellar Doors. *Journal of Wine Research*, 27-37.
- Arfini, F., Bertoli, E., Donati, M., & Mancini, M. C. (2003). *Siner-Gi*. Retrieved from Origin Food: http://www.origin-food.org/pdf/db/it_wine.pdf [Accessed 19 February 2016]
- Barber, N. A., Donovan, J. R., & Dodd, T. H. (2010). Differences in Tourism Marketing Strategies Between Wineries Based on Size or Location. *Journal of Travel & Tourism Marketing*, 43-57.
- Batra, A. (2008). An Exploratory Study on Specific Preferences and Characteristics of Wine Tourists. *International Journal of Tourism and Hospitality Research*, 271-286.
- Brown, G., & Getz, D. (2005). Linking Wine Preferences to the Choice of Wine Tourism Destinations. *Journal of Travel Research*, 266-276.
- Byrd, E. T., Canziani, B., Hsieh, Y.-C. J., Debbage, K., & Sonmez, S. (2015). Wine Tourism: Motivating Visitors Through Core and Supplementary Services. *Tourism Management*, 19-29.
- Carmichael, B. (2005). Understanding the Wine Tourism Experience for Winery Visitors in the Niagara Region, Ontario, Canada. *Tourism Geographies*, 185-204.
- Comité Champagne. (2015). *Les Chiffres Clés*. Retrieved from Site Officiel du Champagne: <http://www.champagne.fr/fr/economie/chiffres-clef> [Accessed 2 April 2016]
- Comité Champagne. (2016). *Les Routes Touristiques du Champagne*. Retrieved from Le Comité Champagne: <http://www.champagne.fr/fr/decouvrir-la-champagne/tourisme/routes-touristiques/reims-et-sa-region> [Accessed 12 March 2016]
- Correia, L., Ascensão, M. J., & MW, S. C. (2004). Wine Routes in Portugal: A Case Study of the Bairrada Wine Route. *Journal of Wine Research*, 15-25.
- Costa, A., & Kastenholz, E. (2009). O Enoturismo como Factor de Desenvolvimento das Regiões Mais Desfavorecidas. *Cabo Verde: Redes e Desenvolvimento Regional* (pp. 1489-1508). Angra do Heroísmo: Associação Portuguesa para o Desenvolvimento Regional.
- Eisenhardt, K. M. (1989). Building Theories from Case Study Research. *The Academy of Management Review*, 532-550.
- Eisenhardt, K. M., & Graebner, M. E. (2007). Theory Building From Cases: Opportunities and Challenges. *Academy of Management Journal*, 25-32.

- Fischer, C., & Alana, L. A. (2009). The Nature of the Relationship Between International Tourism and International Trade: the Case of German Imports of Spanish Wine. *Applied Economics*, 1345-1359.
- Georgiou, C., Kyrgidou, L. P., Archontakis, F., & Petridou, E. (2015). The Role of Location as a Selection Criterion in FDI: The Case of SMEs in Greece. *Journal of East-West Business*, 233-255.
- Instituto da Vinha e do Vinho, I.P. (2014). *Anuário Vinhos e Aguardentes*. Lisboa: Instituto da Vinha e do Vinho, I.P.
- Jitareanu, A. F. (2012). Studies on Global Trends in Wine Marketing. *Agronomy Series of Scientific Research*, 89-93.
- Jover, A. J., Montes, F. J., & Fuentes, M. F. (2004). Measuring perceptions of quality in food products: the case of red wine. *Food Quality and Preference*, 453-469.
- Kelle, U. (2006). Combining Qualitative and Quantitative Methods in Research Practice: Purposes and Advantages. *Qualitative Research in Psychology*, 293-311.
- Le Comité Champagne. (2015). *Rapport d'Activité 2015*. Épernay: Le Comité Champagne.
- MarketLine. (2015). *Global Wine*. Manchester: MarketLine.
- Menival, D., & Charters, S. (2013). The impact of geographic reputation on the impact created in Champagne. *Australian Journal of Agricultural and Resource Economics*, 171-184.
- Nella, A., & Christou, E. (2014). Segmenting Wine Tourists on the Basis of Involvement with Wine. *Journal of Travel & Tourism Marketing*, 783-798.
- Office de Tourisme Reims. (2016). *Activités autour du champagne*. Retrieved from Reims Tourisme: <http://www.reims-tourisme.com/Decouvrir/Champagne/Activites-autour-du-champagne> [Accessed 12 March 2016]
- Olmos, M. F. (2011). The Determinants of Internationalization: Evidence from the Wine Industry. *Applied Economic Perspectives and Policy*, 1-18.
- Outreville, J. F., & Hanni, M. (2013). Multinational firms in the world wine industry: an investigation into the determinants of most-favoured locations. *Journal of Wine Research*, 128-137.
- Panzone, L. A., & Simões, O. M. (2009). The Importance of Regional and Local Origin in the Choice of Wine: Hedonic Models of Portuguese Wines in Portugal. *Journal of Wine Research*, 27-44.
- Rocchi, B., & Gabbai, M. (2013). Territorial identity as a competitive advantage in wine marketing: a case study. *Journal of Wine Research*, 291-310.

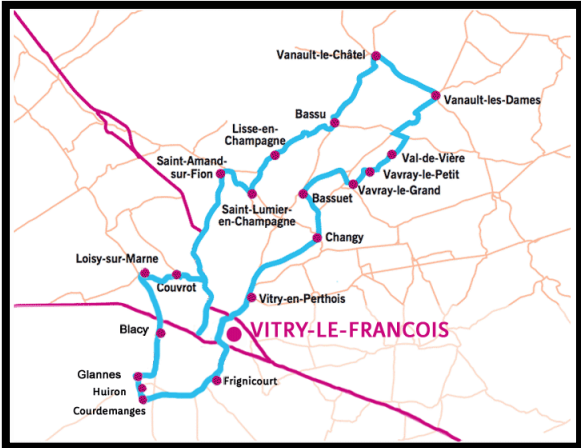
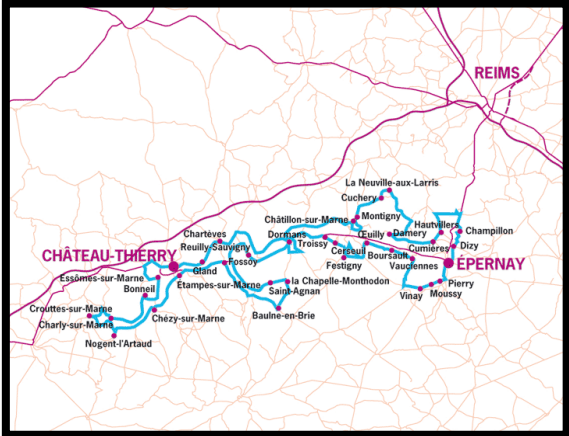
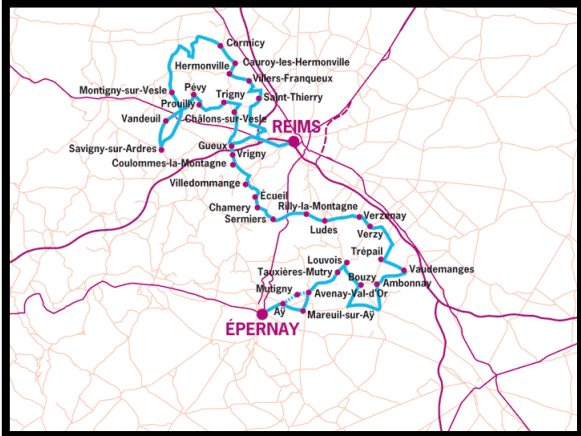
- Rota dos Vinhos Verdes. (2003). *Guia da Rota dos Vinhos Verdes*. Retrieved from Rota do Vinho Verde: http://www.vinhoverde.pt/media/Files/elem_files/873.original.pdf [Accessed 18 February 2016]
- Rota dos Vinhos Verdes. (2016). Retrieved from Vinho Verde: <http://rota.vinhoverde.pt/pt/rotas-dos-vinhos-verdes> [Accessed 21 February 2016]
- Simões, O. (2008). Enoturismo em Portugal: as Rotas de Vinho. *Pasos: Revista de Turismo y Patrimonio Cultural*, 269-279.
- Turismo de Portugal. (2015). *Proturismo*. Retrieved from Turismo de Portugal: <http://www.turismodeportugal.pt/Portugu%C3%AAs/ProTurismo/competitividadeeino-vacao/setoresdeatividade/Documents/Carateriza%C3%A7%C3%A3o%20das%20Unidades%20de%20Enoturismo%20-%20Procura%20%202015%20-%20vers%C3%A3o%20proposta.pdf> [Accessed 18 February 2016]
- ViniPortugal. (2015). *Plano de Promoção de Vinhos de Portugal*. Retrieved from ViniPortugal: <http://www.viniportugal.pt/wysiwyg/DocsSite/8---plano-promocao-2016---vinhos-de-portugal.pdf> [Accessed 18 February 2016]
- Wickramasekera, R., & Bianchi, C. C. (2013). Management Characteristics and the Decision to Internationalize: Exploration of Exporters vs. Non-exporters within the Chilean Wine Industry. *Journal of Wine Research*, 195-209.
- Wu, C.-W. (2016). The international marketing strategy modeling of leisure farm. *Journal of Business Research*, 1345-1350.
- Yin, R. K. (2009). *Case Study Research*. Maryland: Sage.
- Yin, R. K. (2011). *Qualitative Research from Start to Finish*. New York: The Guildford Press.

7. APPENDIX

Appendix 1: The Vinho Verde Region and its Wine Trails



Appendix 2: The Champagne Region and its Wine Trails



Appendix 3: Interviews with Wine and Wine Tourism Stakeholders

Q1: Considera que a(s) rota(s) do vinhos têm um papel fundamental para a visibilidade do vinho português internacionalmente?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

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.

Carlos Ferreira (Turismo do Porto e Norte)

Fundamental não é, mas tem um papel importante porque as rotas do vinho, em geral, dão a conhecer a região e os seus recursos.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

As rotas dos vinhos, embora muito vocacionadas para o Turismo constituem, também, uma alavanca para a venda do seu produto. Quanto mais visibilidade uma rota tiver, e mais investimento for feito neste sentido, mais visibilidade internacional esta terá e, conseqüentemente, os seus vinhos.

Uma boa divulgação por parte das rotas contribui, efetivamente, para a promoção internacional do vinho.

A rota do Alvarinho é uma rota recente (criada em 2008) e com alguma dinâmica mas ainda está muito virada para o mercado nacional.

Esta rota faz parte da ARVP (Associação das Rotas dos Vinhos de Portugal) e, em conjunto, estamos a desenvolver uma estratégia de comunicação e desenvolvimento.

Também colaboramos com o Turismo de Portugal e com a AENOTUR (entidade internacional sem fins lucrativos centrada no desenvolvimento e promoção do Enoturismo a nível mundial. É formada por municípios e entidades gestoras na área do turismo vinculado à cultura do vinho, assumindo-se como uma rede colaborativa de profissionais que usam um espaço promocional comum, fazendo de AENOTUR um observatório internacional do Enoturismo). A AENOTUR pretende ser a ponte de cooperação e conhecimento entre a América e Europa, sendo uma entidade aberta a todas as instituições que queiram colaborar na

produção de conhecimento e de boas práticas no enoturismo a nível mundial. Acreditamos que a AENOTUR poderá funcionar como uma alavanca para a promoção dos nossos vinhos no mercado internacional.

Q2: Quais são os pontos fortes e/ou fracos da(s) Rota(s) dos Vinhos na promoção do vinho português para o estrangeiro?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

Pontos fortes são a divulgação da região dos vinhos e das suas características regionais: o *terroir*, castas, perfil do vinho ao estrangeiro

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.

Carlos Ferreira (Turismo do Porto e Norte)

Os principais pontos fortes são o facto de ser uma montra das regiões portuguesas e dos seus produtos, como o vinho; e um *front office* de conhecimento.

Os pontos fracos, e que são comuns a todas as rotas, é que é um produto acabado e que as pessoas geralmente não levam até ao fim. É algo que se “toma” de passagem.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

O principal ponto forte, no caso da Rota do Vinho Alvarinho, é o facto de fazer parte de um território com vinhos de grande qualidade.

Em termos de pontos fracos é o facto da oferta, na região (Minho e Vinho Verde), estar desfragmentada. A tendência será uniformizar e elevar a qualidade da oferta. Para o efeito é muito importante o trabalho em rede entre as várias empresas aderentes.

Outro ponto fraco é a falta de verbas para a promoção e formação dos aderentes e do território. Existe uma enorme dificuldade em obter verbas para estas ações por forma a garantir a sustentabilidade do funcionamento das rotas dos vinhos.

Neste momento, o foco no público-alvo é, maioritariamente, o mercado nacional. A partir do momento que este mercado estiver bem desenvolvido, tendencialmente, deveremos começar a explorar o mercado internacional.

Q3: Comparativamente a outras rotas internacionais, acha que as portuguesas se encontram no mesmo patamar?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

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.

Carlos Ferreira (Turismo do Porto e Norte)

Comparativamente a outras rotas internacionais, as portuguesas não estão ao mesmo nível. Como exemplo há as rotas francesas e mesmo as espanholas têm mais turistas e estão mais desenvolvidas em termos de atividades e promoção.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

Difícilmente. As rotas portuguesas ainda estão a dar os primeiros passos. Em Espanha, ao contrário de nós, houve um grande investimento do governo central, regional e das associações de vinho e turismo. Em certas rotas de vinho de Espanha, cerca de 60% do vinho produzido nas adegas é vendido à porta. Nós gostaríamos de chegar a esses números mas ainda estamos muito longe.

O vinho é mais que um produto, ou seja, é também a representação da região e do seu território. Ao atrair as pessoas ao nosso território, mostrarmos os nossos vinhos, os nossos produtos, a nossa gastronomia, as nossas paisagens, as nossas vivências, estamos a transmitir um legado para que, depois, também elas nos deem a conhecer aos outros. Essas pessoas passam a ter uma parte ativa na nossa divulgação. Por isso é que uma rota de vinhos de excelência é aquela que, tendo o vinho como eixo principal, possui aderentes de várias tipologias que trabalham em rede e promovem o território como um todo.

A Rota do Vinho Alvarinho assenta as suas bases na carta europeia do enoturismo⁶. Foi um projeto desenvolvido numa parceria com Espanha (Rota do vinho do Ribeiro-Ourense) e foi aí que “bebemos” muita informação sobre o verdadeiro conceito de Enoturismo. O Enoturismo convida-nos a experimentar o mundo do vinho conhecendo toda a cultura e a história que envolve este produto natural. Assim, o visitante pode desfrutar não só de degustações de vinhos, mas também pode conhecer aspetos como a arquitetura, a arte, o

6

<http://www.turismodeportugal.pt/Portugu%C3%AAs/AreasAtividade/desenvolvimentoeinovacao1/ReuniaoTecnicaEnoturismo/CataEuropeiadeEnoturismo/Anexos/Carta%20Europeia%20Enoturismo.pdf>

folclore, a gastronomia o pedestrianismo e, inclusive, aproximar-se ao mundo da enoterapia, onde se conjuga a saúde, beleza e bem-estar. É assim como deve funcionar uma verdadeira Rota de Vinhos e é com esta base nesta que nos desenvolvemos. Efetivamente, as Rotas de Vinhos de Espanha já estão muito mais avançados em relação às Rotas Portuguesas. E a diferença começa com o conceito.

Q4: O que pode ser feito para potenciar as rotas dos vinhos e a sua visibilidade fora de Portugal?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

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.

Carlos Ferreira (Turismo do Porto e Norte)

O que devia ser feito era uma congregação das rotas, não haver tantas e as que existem unirem-se (5 ou 6) para promover uma região em concreto ou mesmo o país. Assim era possível apresentar propostas mais aliciantes e de maior peso para a presença em feiras e eventos internacionais.

Por exemplo: os vinhos do Douro poderiam englobar as regiões espanholas, fazer a promoção ibérica e não só Portuguesa. Há tanta gente que não conhece nem sabe onde fica Portugal e desta forma aumentariam a sua notoriedade e atrairiam mais turistas, sendo possível chegar a mais pessoas e mais regiões pelo mundo.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

Uma grande necessidade que temos é o apoio do Turismo de Portugal e do Governo Central para investir no Enoturismo, no seu crescimento e desenvolvimento. E também um maior apoio para a promoção.

Q5: Considera haver alguma correlação positiva entre as exportações de vinho desta(s) regiões e as suas rotas?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

Não há relação significativa, pois a notoriedade internacional destas rotas é muito baixa.

Carlos Ferreira (Turismo do Porto e Norte)

Sim, porque as rotas do vinho andam muito à volta da experiência turística com a região e com o seu produto. E o turista ao experimentar e se gostar quer repetir e reproduzir a experiência em casa. Por isso, estas experiências aumentam a probabilidade dos vinhos serem procurados também no estrangeiro.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

No caso da Rota do Alvarinho, considero que ainda não chegámos a esse ponto. É necessário um grande nível de desenvolvimento, que ainda não temos, para influenciar a promoção e a exportação do vinho português e a geração de uma causa-efeito na promoção do Enoturismo.

O vinho que é vendido para fora e que é reconhecido internacionalmente deve-se ao esforço dos produtores e é para eles todo o mérito nesse sentido.

Em Monção e Melgaço há produtores que vendem exclusivamente para o mercado nacional, outros vendem para o mercado nacional e estrangeiro e há poucos casos em que os produtores vendem mais para o estrangeiro do que para Portugal mas, como já mencionado, o esforço é e foi todo deles. Podemos salientar alguns mercados onde o Alvarinho de Monção e Melgaço está presente: Alemanha, Angola, Bélgica, Brasil, Canadá, China, Coreia do sul, Dinamarca, Espanha, Estados Unidos, França, Holanda, Inglaterra, Irlanda, Israel, Itália, Japão, Letónia, Luxemburgo, Noruega, Polónia, Suécia, Suíça e Singapura, etc.

No entanto, face a toda a dinâmica empresarial na exportação, a Rota do Alvarinho ainda está muito focada na organização interna.

Q6: 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?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

Os maiores entraves são principalmente a nível de estrutura. Como já referido, as equipas são muito pequenas e estão muito limitadas para promover a região e as suas rotas: poucas pessoas e poucos recursos técnicos e orçamentais principalmente.

Carlos Ferreira (Turismo do Porto e Norte)

Não creio que haja alguma limitação que impeça os produtores de exportar o seu vinho.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

A maior limitação, como já referida nos pontos fracos, é a desfragmentação da oferta.

Gradualmente, os aderentes vão percebendo as vantagens de trabalhar em rede, mas ainda há muito trabalho a fazer: Muita formação e espírito de entrega e pertença à cultura do vinho é necessária para esta ser vista em todo o lado, em todas as regiões do nosso território.

Há limitações para dar o salto que é necessário para chegar a um bom nível de promoção.

Q7: Acha que as rotas do vinho são direcionadas mais para o público nacional?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

São maioritariamente para o público nacional, por estarem presentes em feiras nacionais e pela promoção nacional ser mais abundante do que a internacional, pelos motivos já referidos.

Carlos Ferreira (Turismo do Porto e Norte)

Acho que é para os dois. No entanto, de acordo com as informações obtidas pelo Turismo do Porto e do Norte, as rotas do Minho, assim como a Rota dos Vinhos Verdes são mais procuradas e vocacionadas para o público português.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

Como mencionado, presentemente, estamos focados no mercado nacional e em desenvolvê-lo da melhor maneira possível para depois alavancar para o mercado internacional.

Q8: Comparativamente ao mercado interno, tem conhecimento de como é feita a promoção das rotas dos vinhos para o mercado internacional?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

Não há nada de especial a ser feito atualmente lá fora por estas rotas. Há exceção do Vinho Verde, que por ser exclusivamente português e da região dos Vinhos Verdes tem maior notoriedade internacional. É o *made in* Portugal mais apetecível por isso mesmo e portanto tem maior sucesso na promoção internacional, e a nível do enoturismo, que outros vinhos regionais (tinto, branco, espumante) que também são feitos em outros países.

Carlos Ferreira (Turismo do Porto e Norte)

A promoção das rotas dos vinhos não é muito eficiente. Se formos comparar com Espanha podemos constatar que não há bons pontos de venda dos produtos regionais, neste

caso o vinho. Em Espanha há muito mais divulgação tanto nacional como internacional. Em Portugal a promoção internacional é pouco significativa.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

Como mencionado, a promoção internacional não é feita ou é muito rudimentar. O foco é ainda o mercado nacional (o qual precisa de criar alguma uniformização e regras de funcionamento para que as Rotas sejam percecionadas como tal). Ocasionalmente, e de uma forma muito suave, algumas CVR's fazem alguma promoção das Rotas de Vinhos no exterior, nomeadamente em Feiras Internacionais ou eventos dirigidos. A criação da AENOTUR e da ARVP pretende colmatar essa lacuna: promoção das Rotas de vinhos no mercado internacional.

Q9: Quais é que acha que são os tipos de turistas que mais procuram estas rotas? Porquê?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

Pela realidade da Bacalhôa, o tipo de turista internacional que mais procuram estas rotas são conhecedores dos vinhos por estes serem já comercializados no seu país.

O turista brasileiro com um elevado poder de compra é o mais comum, depois também recebemos vários franceses e espanhóis, sendo estes em menor número.

Com um poder de compra elevado, conhecedores e apreciadores de vinho, estes turistas muitas vezes já são nossos clientes que sabem do que vêm à procura e têm curiosidade em perceber como é feito o nosso vinho.

Carlos Ferreira (Turismo do Porto e Norte)

Na maioria dos turistas estes são conhecedores e apreciadores de vinho e em termos de nacionalidade há muitos espanhóis.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

O enoturismo está a ter um crescimento a nível nacional. A cultura do vinho começa a ganhar algum peso. A procura dos territórios e daquilo que os melhor representa: gastronomia e vinhos, produtos locais, património, lazer, natureza, desporto, folclore, aventura,... está a aumentar. Há muitas pessoas que procuram destinos com alguma diferenciação e, independentemente do tamanho das adegas e dos produtores, as pessoas querem é viver uma experiência com qualidade.

Em termos de público, a maioria são portugueses, tendo também muitos visitantes provenientes da Galiza, mas estes são muito mais entendedores da cultura do vinho e é um

público que temos grande interesse em atingir porque tem uma mentalidade diferente. Está muito mais desenvolvido para a cultura do vinho do que o português, muito provavelmente devido ao maior interesse e desenvolvimento de Espanha: eles tem muito mais o serviço de venda de vinho a copo em restaurantes e oferecem muitas mais atividades fora das adegas. E nós queremos educar o público português assim; queremos todos com o mesmo nível em termos de conhecimento.

Q10: No seu entender, a nível de sucesso no reconhecimento e promoção internacional há rotas melhores que outras? Quais?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

Como já referido, a Rota do Vinho Verde por ter um produto exclusivo poderá ser aquela que tem maior reconhecimento internacional.

Carlos Ferreira (Turismo do Porto e Norte)

O dinamismo é um fator crucial no desempenho promocional destas rotas. A Rota do Vinho Verde poderá ser uma rota com um desempenho superior pois é a mais dinamizada em termos de promoção, por ter um produto exclusivo. Representa um fator diferenciador que lhe confere maior atratividade, comparativamente a outras rotas.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

Efetivamente há rotas mais ativas que outras. Mas em geral ainda é preciso fazer muita coisa.

A ARVP está a trabalhar para criar uma uniformização dos aderentes e das rotas. Tem de haver uma entidade que desenvolva, uniformize e organize todo o processo. Ainda há muito trabalho a fazer.

Há muitas rotas que efetivamente existem mas que não funcionam. Um exemplo de uma rota que funciona muito bem é a Rota de Vinhos da Península de Setúbal. Possui muita dinâmica e um bom trabalho em rede. A Rota da Bairrada, com a qual também trabalhamos e trocamos muitas ideias, também é um bom exemplo.

Há rotas que não funcionam de forma integrada, apenas são circuitos sem regras.

Um ponto fraco é que as rotas não são pensadas quando são criadas e têm custos de manutenção e desenvolvimento muito elevados. Isto leva a que, a curto prazo, estas estagnem ou deixem mesmo de funcionar pois não são sustentáveis.

No caso de Monção e Melgaço, se não fosse o apoio dos municípios era muito difícil manter a Rota a funcionar: custos inerentes à logística (funcionamento da sede, recursos humanos), promoção e divulgação (sinalização, edição de material promocional, manutenção de um portal dinâmico, participação em eventos e feiras promocionais, deslocações e vistorias aos aderentes, formação profissional...). Sem apoios toda a atividade e trabalho desenvolvido acaba por não ter frutos.

É necessário haver um trabalho constante que acarreta custos elevados.

Q11: Quais é que considera serem as entidades governativas que mais contribuem para o desenvolvimento do turismo nestas regiões?

Filipa Lopes (Vinhos Bacalhôa/Aliança)

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 Bacalhoa, e não esquecer também as unidades hoteleiras.

Carlos Ferreira (Turismo do Porto e Norte)

No caso do Porto e Norte de Portugal as entidades que mais contribuem para a promoção do turismo é o Turismo do Porto e Norte, em seguida o Instituto da Vinha e do Vinho e também os próprios produtores.

Isabel Domingues (Câmara Municipal Melgaço/ Gabinete Técnico Rota do Alvarinho)

As Entidades Regionais de Turismo e as Comunidades Intermunicipais.

As Comissões Regionais de Viticultura também deveriam ter um papel mais ativo no desenvolvimento do Enoturismo (ligação do produto-vinho-ao turismo) e na sua promoção no exterior.

As associações emergentes também poderão ter um papel muito ativo para o desenvolvimento do turismo nestas regiões e funcionarem como elo de ligação às entidades governativas, por exemplo a AMPV, ARVP e a AENOTUR.

É necessário criar uma estratégia para haver uma entidade supra que valide e direcione as rotas dos vinhos.

Appendix 4: Survey for Wine Sellers

Caro participante,

Este questionário foi criado no âmbito de uma tese de mestrado na Universidade Católica Portuguesa. O seu objetivo é compreender o nível de envolvimento internacional que o enoturismo na região dos Vinhos Verdes tem. Todas as respostas registadas serão 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 de 5 minutos.

Nome da organização (opcional):

Ano de início de atividade:

Vende ou produz vinho?

- Sim
- Não

If Não Is Selected, Then Skip To End of Survey

Está associado à Rota do Vinho Verde?

- Sim
- Não
- Estou associado a outra rota. Qual? _____

If Não Is Selected, Then Skip To Que atividades são desenvolvidas nas ...

Se sim, há quantos anos?

Diga em que medida concorda, ou não, com as seguintes afirmações:

	Não Concordo	Não tenho opinião/Não se aplica ao meu caso	Concordo
Pertencer à Rota dos Vinhos é benéfico para o meu negócio	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ao estar associado à Rota dos Vinhos recebo mais turistas estrangeiros	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Estar associado à Rota dos Vinhos permite-me vender mais vinho	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
As minhas exportações aumentaram com a associação do meu negócio à Rota dos Vinhos	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Classifique o nível de impacto que a Rota dos Vinhos teve para o reconhecimento do vinho que produz e/ ou vende.

A Rota dos Vinhos contribuiu para o reconhecimento dos meus vinhos:

	Nulo	Pouco	Moderado	Grande	Muito Grande
A nível nacional o impacto foi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A nível internacional o impacto foi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Que atividades são desenvolvidas nas suas instalações?

- Vinicultura
- Armazenagem
- Distribuição
- Venda Direta
- Alojamento
- Outras: quais _____

Que atividades oferece nas suas instalações aos turistas? (mais que uma opção possível)

- Visitas Guiadas
- Venda de Vinhos
- Venda de Souvenirs
- Participação nas Vindimas
- Alojamento
- Refeições
- Exposições
- Cursos de Vinhos
- Provas de Vinhos
- Outras: quais _____
- Não recebo turistas nas minhas instalações

If Não recebo turistas ... Is Selected, Then Skip To Tem o seu vinho à venda em retalhista...

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
- _____ Entre 20 a 30 anos
- _____ Entre 30 a 40 anos
- _____ Entre 40 a 50 anos
- _____ Acima de 50 anos

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

- Sim
- Não

Ordene, numa escala de 1 a 4, sendo 1 o mais frequente e sendo 4 o menos frequente, qual o motivo da visita:

- _____ Lazer
- _____ Negócios: Por parte de agências de viagens e outras empresas de turismo
- _____ Negócios: Por parte de profissionais do sector do vinho

_____ Outro:

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

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

Das pessoas que visitam as suas instalações, quais as percentagens que representam os visitantes estrangeiros e os nacionais?

_____ Visitantes Estrangeiros

_____ Visitantes Nacionais

Diria que a procura internacional pelas suas instalações:

- Não existe
- Tem vindo a diminuir
- Tem vindo a aumentar
- Tem-se mantido

Indique as 3 principais nacionalidades dos seus visitantes:

Nacionalidade 1

Nacionalidade 2

Nacionalidade 3

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

_____ Visitantes que não compram vinhos

_____ Visitantes que compram vinhos

Tem o seu vinho à venda em retalhistas internacionais?

- Sim: quais _____
- Não

Colabora ou conta com o apoio de outras empresas ou entidades na promoção da sua empresa?

- Sim: quais _____
- Não

Realiza ou já realizou investimentos para a venda ou promoção internacional dos seus vinhos?

- Sim
- Não

Participa ou já participou em eventos de promoção internacional?

- Sim
- Não

Ordene, numa escala de 1 a 5, sendo 1 o mais frequente e sendo 5 o menos frequente, qual o destino dos vinhos comprados nas suas instalações.

- _____ Consumo Próprio
- _____ Horeca (Hotéis, Restaurantes e Cafés) em Portugal
- _____ Super/Hipermercados em Portugal
- _____ Exportação
- _____ Outro:

Diria que a procura internacional pelo seu vinho:

- Não existe
- Tem vindo a aumentar
- Tem vindo a diminuir
- Tem-se mantido

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

_____ Percentagem de Compradores Estrangeiros

Dos compradores estrangeiros que possui, indique numa escala de 1 a 5, sendo 1 o mais frequente e 5 o menos frequente, como estabeleceu contacto com os mesmos:

- _____ Durante a visita às minhas instalações
- _____ Através de terceiros
- _____ Durante uma feira/ evento promocional fora das minhas instalações
- _____ Eu procurei e estabeleci contacto direto com estes clientes por iniciativa própria
- _____ Outro:

Promove o seu negócio nas redes sociais?

- Sim
- Não

Possui plataforma de vendas online?

- Sim
- Não

If Não Is Selected, Then Skip To End of Survey

Se sim, diria que o volume de vendas online, por ano:

- É satisfatório
- Ainda não chegou aos objetivos pretendidos

Se sim, indique os 3 principais destinos para onde é vendido o vinho através da plataforma online.

1º Destino

2º Destino

3º Destino