



**ASSOCIAÇÃO DE POLITÉCNICOS DO NORTE (APNOR)  
INSTITUTO POLITÉCNICO DE BRAGANÇA**

**Casa Pereirinha - A Marketing Plan for a Pateo  
House in Alentejo**

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Final Dissertation submitted to *Instituto Politécnico de Bragança*

To obtain the Master's Degree in Management, Specialisation in Business  
Management

**Supervisor:**

**Manuel José Serra da Fonseca**

***Bragança, October, 2022.***



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## **ABSTRACT**

There is no doubt that tourism benefits Portugal's economy. The area should be able to better target the market for its travel and tourist products and increase its performance with the use of a marketing strategy, especially in a field where global competition is always increasing. This marketing plan seeks to analyze the strengths and limitations of the Portuguese region in its target markets, as well as the most current advancements in the global travel and tourism sector.

In the following work we conduct the analysis of both micro and macro environments of the company, in the form of a SWOT and PESTEL analyses, as well as the analysis of the Porter's five competitive forces. There were we state the appointed marketing strategy through segmentation, target selection and positioning definition, which guided the marketing objectives to be pursued.

In addition to this we create a marketing mix based on the 7P's (Product, Price, Placement, Promotions, People, Process, Physical Evidence).

Furthermore, the work provides the prospective avenues for product growth and marketing following the markets' stated growth objectives. This project comprises creating a comprehensive marketing strategy for The Casa Pereirinha as a significant example of the region's tourism business, and our primary purpose is to conserve its past while developing a new strategy.

**Keywords: Tourism, Portugal, Economy, Marketing Plan, Marketing Strategy, Casa Pereirinha, Alentejo, Vidigueira**

## RESUMO

É um facto inegável que a atividade turística é benéfica para a economia portuguesa. Sendo um setor onde a concorrência é crescente e altamente competitiva, a estruturação de produtos turísticos deve estar consubstanciada em estratégias e táticas de marketing. Assumido como um estudo aplicado, o presente trabalho final de mestrado assume-se como um plano de marketing para um produto turístico localizado no Alentejo. Este plano de marketing procura analisar os pontos fortes e limitações da região portuguesa e dos seus mercados-alvo, bem como os avanços mais atuais no sector global de viagens e turismo.

No presente trabalho foi realizada uma análise dos ambientes micro e macro da organização, sob a forma de análises SWOT e PESTEL, bem como a análise das cinco forças competitivas do Porter. Posteriormente, em termos de marketing estratégico, foram definidos os conceitos de segmentação, seleção de alvos e definição de posicionamento, que orientou os objetivos de marketing a serem prosseguidos.

Em termos Operacionais foi definido o marketing-mix baseado nos 7P's (Produto, Preço, Colocação, Promoções, Pessoas, Processo, Provas Físicas).

. Este projeto inclui a criação de uma estratégia de marketing anual para a Casa Pereirinha, assumindo-a como um exemplo significativo do negócio turístico da região.

**Palavras-chave:** Turismo, Portugal, Economia, Plano de Marketing, Estratégia de Marketing, Casa Pereirinha, Alentejo, Vidigueira

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## **ABBREVIATIONS/ACRONYMS**

- **AMA** – American Marketing Association
- **CPV** – Cost Per View
- **CPC** – Cost per Click
- **CRM** - Customer Relationship Management
- **GDP** - Gross Domestic Product
- **INE** - Instituto Nacional de Estatística (Statistics Portugal)
- **KPI** – Key Performance Indicator
- **LTV** – Life-Time Value
- **PESTEL Analysis** - Political, Sociocultural, Technological, Environmental, and Legal Analysis
- **STP Approach** - Segmentation, Targeting and Positioning Analysis
- **SWOT Analysis** - Strengths, Weaknesses, Opportunities and Threats Analysis
- **TOV** – Tone of Voice
- **UGC** – User Generated Content
- **UNWTO** - United Nations World Tourism Organization

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## 1. INTRODUCTION

Tourism is one of the most important sectors in the World. According to the World Tourism Organization (World Tourism Organization, 2013) it accounts for 9% of the global Gross Domestic Product (GDP), generates 1 in 11 jobs, and represents 6% of total world exports (International Tourism Highlights, 2019 Edition). The same organization noted a record 1.087 million international tourists in 2013 and predicts that in 2030 this figure will reach 1.8 billion. For Portugal specifically, is one of the most important economic activities developed in the country.

A bright future for Portugal's tourism and hospitality industries can be predicted given the successful results of 2019 and the current pipeline of ongoing projects. This optimistic outlook has been supported by reputable industry experts. The World Economic Forum's placement of Portugal as the 12th best country (out of 140) in the 2019 Travel and Tourism Competitiveness Index reflects its solid position at the beginning of this year. The rating has moved up three notches since 2015. According to WTTC predictions, travel and tourism will contribute 16.5% of Portugal's GDP in 2019, up 4.2% from 2018. Foreign visitors made up 24.6 million, an increase of 7.6% from 2018, and they generated €18.431 M in revenue, or 8.7% of Portugal's GDP (if local tourism is included, this percentage rises to 15% of GDP). Tourism accounted for 19.7% of all exports and 52.3% of service exports, according to the Instituto Superior de Ciências Empresariais (Instituto Nacional de Estatística, 2020).

While the quantitative tourism indicators available show that tourism has a great impact on the economy, qualitative information also demonstrates that Portugal is seen as a leader in world tourism and its prospects to grow are very promising. During the last four years in a row, Portugal won the prize of Europe's best tourism destination. In the last edition of the World Travel Awards, Portugal received 24 prizes, including Europe's leading beach destination, leading adventure tourism destination, leading cruise destination, and leading city break destination (World Travel Awards, 2020). In addition to this, the Executive Digest ranks Portugal first with the best tourism promotion in Europe, and the third best in the world (Executive Digest, 2020).

The outbreak of the pandemic in Portugal has had a great impact on the number of guests: it went down by 61.3%, from 27.1 million in 2019 to 10.5 million in 2020 which is a significant decrease for the local businesses and tourism sector (Instituto Nacional de Estatística, 2020).

Due to Portugal's rapidly increasing demand for foreign travel, the area of the hotel business has experienced an increase in attention in recent years. The number of transactions and development strategies has increased as a result of this goal. Better KPIs and competitiveness indicators have been reflected in this upward trend as a result of increased supplier rivalry in expanding markets, the introduction of new brands into the nation, and changes in customer behavior and needs. The development of Portugal's hotel, tourism, and leisure industries has been impacted by each of these variables at this pivotal point.

Alentejo is a high potential area for tourism development, but only now it begins to be implemented. The impact analyses of current investments on this territory and resident population may, on one side, be used to understand what the critical factors for regional sustainability may be, without suffocating economic development. Tourism in Alentejo is one of key priorities of the Portuguese ministry of tourism these days. (Serdoura et al., 2009).

In this work we develop an extended marketing strategy for the patedo house in Vidigueira – Casa Pereirinha. Casa Pereirinha is the great example of the local traditional tourism scape and our key priority is to create a modern approach while keeping all the values and the heritage of this place.

The House was founded by José Mendes Carvalho, a businessman who settled in Vidigueira and brought industries and wealth to the village. Passed on from generation to generation, the house grew, improving quality and comfort. It was pampered by its owners and praised by its guests.

Casa Pereirinha is not just the guest house, but a house that belonged to one family for 300 years, and for this reason it was essential not just to create the efficient analyses and the instruments, but also pay the respect and take into account the opinions of Pereira Freire de Andrade Family, to whom I would like to express my gratitude and thank for allowing to work on such an important to them matter.

## **2. LITERATURE REVIEW**

Businesses in the tourism sector must always be aware of their products' market positions, as well as the competition they face, and the most current industry innovations. They must also be able to analyze if they are on track to meet their previously established goals and, if not, what tactical changes are required.

In order to conduct a proper marketing research and establish a marketing strategy it is essential to review the marketing definitions that will help to do so: marketing concept, marketing objectives, marketing situation diagnosis, marketing strategy, segmentation, targeting, positioning, marketing-mix, marketing plan, tourism marketing.

### **2.1 Marketing Concept**

Marketing has been an irreplaceable part of the social construct since the first sign of the market competition. The skill of telling great stories, proving your worth to the customer, creating desirable products appeared long time before the scientific world named it "marketing".

The first Marketing definition appeared in 1935 and was explained as the performance of business activities that direct the flow of goods, and services from producers to consumers (Darroch et al., 2004). Since then, American Marketing Association (AMA) updates the definition for "marketing" and "marketing strategy" every three years since marketing is a rapid changing construct that requires regular adaptation to the realities (American Marketing Association, 2017).

The first major stage in the evolution of marketing is usually identified and bounded from the early 20th century to the middle of the 1930s. At that time, there was an active search for crisis management means, both at the state level, and at the level of individual and well-known firms: General Electric, General Foods, McDonald's, Ford, etc., and then marketing as an independent activity spread to enterprises in Europe and Japan (Fullerton, 1988).

Modern marketing relies on the concepts of strategic, socially oriented (socio-ethical), individual marketing, relationship marketing, marketing of large social communities - meso- and "megamarketing" (Eriashvili et al., 2003).

Marketing concepts are the assumptions that characterize the active orientation of an enterprise's market activities at the various stages of its development.

The modern concept of marketing is following the approach that all the activities of an enterprise (scientific and technical, production, sales, etc.) are based on the knowledge of consumer demand and its changes in perspective. Moreover, one of the objectives of marketing is to identify unmet customer demands in order to orient production towards meeting these demands (Kuzmak & Shaidyuk, 2020).

Marketing means developing, producing and marketing what a consumer demand. In implementing the marketing concept, the focus of economic decision-making is shifted from the production links of the enterprise to the links that feel the pulse of the market (Kalyuzhnova & Yakobson, 2010).

The Marketing concept has different approaches depending on the subject of the study and other variables. The following analysis does not have a goal of considering all the marketing approaches, but gives an opportunity to represent the most common marketing schools.

The American school, based on the work of F. Kotler and J. Day, reduce the essence of marketing to the necessity of elaboration and management of the marketing complex. Thus, the marketing orientation is based on the functional level of management of the organization, also, the concepts of marketing and market orientation are used as synonyms (Kotler, 1991).

The French school of marketing demonstrates a different approach. J.-J. Lambin is considered its brightest and most famous representative. This school focuses on the need to maintain an optimal balance between the interests of consumers and distributors, as well as the influence of competitors and the marketing macro-environment. The optimal balance in this case should be maintained through cross-functional coordination (Lambin & Schuiling, 2012).

Finally, the German school represented by Fischer-Winkelmann speaks about the necessity of using an extended interpretation of the market for understanding the market orientation of the firm. Marketing itself is identified in this context as market-oriented business management (Fischer-Winkelmann, 1976).

From the perspective of management, markets are linked by value chains/networks to the consumer which leads to the new conception of marketing.

While some economists talk about value chains (Kondratyev & Schwarz, 2019; Lukianov & Drapkin, 2017; Smorodinskaya & Katukov, 2020), marketing researchers use the term "value" and talk about chains or networks of (consumer) value creation, using the same the same term: 'value chain' (Keegan & Green Mark C., 2016), "value delivery network" (Kotler & Armstrong, 2017).

Thus, for example, value chain is seen as a tool to identify ways to create superior (to competitors) customer value, and the value network as a system of partnerships and alliances created by a firm to provide, add to (form) and deliver its offer (to the consumer) (Kotler & Keller, 2012).

Marketing is one of the functional areas of business, distinct from finance and operations, which is seen as a set of activities and processes that, along with product design, production and transport logistics, make up a firm's value chain (Alyoshina, 2022). Decisions at each of the value chain, from product idea/concept to after-sales support, must be evaluated in terms of their ability to create value. In terms of their ability to create value (utility) to consumers (Keegan & Green Mark C., 2016).

Product value, not cost, is the central conception of modern marketing, since the success of a business in the business determined not so much by the volume (value, i.e. cost/cost, price) of the goods and services it produces (including unsold), but by the volume of goods and services it sells

(paid for by consumers and therefore valuable, needed and actually demanded by the market) (Alyoshina, 2022).

## **2.2 Marketing objectives**

Defining the research objective is the most complex, time-consuming and valuable stage of the market research process. It requires a multifaceted analytical effort to select and expertly assess a variety of factors in the macro and micro marketing business environment (Starostina et al., 2022). It allows studying the company's place in the market, identifying alternative ways of performing management tasks, defining marketing research objectives, and obtaining information for making informed decisions.

Determining the objective is the initial and most important step in market research, since incorrectly defining the objective leads to the failure of the research and the inability to make an informed managerial decision to operate in domestic and international markets (Gibson, 1998).

In scientific publications, the issue of defining the purpose of marketing research is mostly treated as a general method, without a specific methodology detailing the tools that could be immediately used in practical work. Sometimes authors declare a forthcoming clarification of the "framework for problem definition", but, in general, it ends up with a few well-known recommendations for the formulation of an objective of market research (Smith & Albaum, 2010).

On the other hand, the manual for marketing managers contains only two paragraphs in the section on marketing research that actually talks about marketing research objective (M. McDonald et al., 2003).

The ESOMAR Handbook of Marketing Research provides five pages of brief general information on how to determine a marketing research objective (van Hamersveld & de Bont, 2007).

It is important to distinguish between the method of setting a marketing research objective, as a theoretically based approach, and the technique, which is a specific logical set of steps and tools to implement the method to achieve a predetermined result (Mirskij, 2001).

The range of tasks to be carried out when defining the purpose of marketing research includes: interviews with decision-makers, interviews with industry experts and other knowledgeable people, analysis of secondary data, and sometimes qualitative research. These tasks help the researcher understand the background to the problem by analyzing the context around it. The management decision problem is then translated into a market research problem (Malhotra, 2010).

The technique for setting marketing research objectives should take into account some general principles: feasibility, repeatability, relevance to the goals and objectives of the planned activity, validity and effectiveness (Senkina et al., 2007).

### **2.3 Marketing situation diagnosis**

According to Kotler (1997) situational analysis is a systematic planning, collection, analysis of data, and presentation of results and conclusions in a manner appropriate to the specific marketing situation faced by the company. Likewise, Kerin et al. (2008) add that these activities aim to understand where the company has been lately, where it is now and where it is headed, considering the organization's plans, external factors and the trends that affect it (Kerin et al., 2008).

The analysis must be combined with intuition and judgment to make the results of the analysis useful for planning purposes. Situation analysis should not replace the manager in the decision-making process. Its purpose is to empower the manager with information for more effective decision making (Ferrell & Hartline, 2011).

We cannot fully agree with that statement as the analysis of the situation is the basement of any successful strategy.

The importance of the internal and external environment and their effect on the development and implementation of marketing planning is crucial and should be highly considered by any organisation wishing to be profitable in the increasingly competitive international marketing arena (Vrontis & Pavlou, 2008).

In terms of the external diagnosis of the situation most commonly is used PESTEL analysis as one of the classic frameworks in strategic management and is often referenced in textbooks on marketing and strategic management (Johnson et al., 2017).

PESTEL analysis is presented as a useful framework for the external analysis of key factors that may directly or indirectly affect organizations or industries. Hence, it allows managers to get useful information that they can use to predict future situations and market conditions (Madsen & Grønseth, 2022). The analysis includes the following factors: socio-cultural, technological, economic, political, environmental and legal. According to the author M. Buble (2009), key segments of the environment in which the international company operates, are precisely the elements of PESTEL analysis; natural environment, technological environment, economic environment, political environment, legal environment, demographic environment and cultural environment (Buble, 2009). Johnson and Scholes (2006) define PESTEL analysis as a model to analyze the factors affecting international companies and we can apply it to a tourist destination because it operates in an international environment, in terms of macro indicators (G. Johnson et al., 2006).

Political factors include the stability of the state, tax policy, foreign trade regulations, and policy development and welfare of the community. Economic factors according to Johnson and Scholes (2006) include business cycle, GDP trends, interest rates, currency in circulation, inflation and unemployment. Socio-cultural factors are demographic indicator, income distribution, social mobility, changes in lifestyle, behavior and attitudes toward work and leisure, consumerism, education level. Technological factors include government spending on research, government efforts toward

technological achievements, new discoveries and development, the rate of technology transfer. Ecological factors include legislation on environmental protection, waste removal and energy consumption. Legal factors include legal regulations state monopoly regulations, employment law, health and safety, product safety (Gregoric, 2014).

SWOT Analysis (short for strengths, weaknesses, opportunities, threats) is a business strategy tool to assess how an organization compares to its competition (Klein et al., 2019). The strategy is historically credited to Albert Humphrey in the 1960s, but this attribution remains debatable. Also known as the SWOT Matrix, it has achieved recognition as useful in differentiating and establishing a niche within the broader market.

Ferrell and Hartline (2011) point out that the SWOT analysis has several advantages, such as:

- (I). Simplicity: no training or technical skills required for its use;
- (II). Costs: it allows the reduction of costs with areas exclusively linked to strategic planning;
- (III). Flexibility: improve the quality of strategic planning even without extensive information systems;
- (IV). integration and synthesis: it is possible to integrate and synthesize various information, whether quantitative or qualitative in nature;
- (V). Collaboration: exchange of information and collaboration between managers in different areas in order to solve problems and eliminate possible conflicts before finalizing the strategic plan.

The more thoroughly the earlier situational -and SWOT-analyses have been done, the easier it is to set precise objectives. As setting objectives is an essential part of the marketing planning process and if the company fails to provide them it reflects to the managers and employees lack of clear direction (Bowie, 2004).

## **2.4 Marketing strategy**

One of the weakest points of both theory of marketing and theory of strategic management is interpretation of relationships between overall (corporate) strategy and marketing strategy. The most popular approach is the idea of the so-called hierarchy of strategies (Marek, 2014).

In creating a marketing strategy, we use an STP approach which refers to Segmentation, Targeting and Positioning. Its main goal is to help us to do a market segmentation process (Moutinho, 2000).

The role of strategic marketing is to lead the firm towards attractive economic opportunities, that is, opportunities that are adapted to its resources and Financial Times Prentice Hall Financial Times Prentice Hall Financial Times Prentice Hall know-how and offer a potential for growth and profitability (Lambin & Schuiling, 2012).

Marketing research conducted to develop a company's marketing strategy is not only very difficult, as it is carried out in a highly competitive environment, but also very responsible. In this regard, one cannot underestimate the importance of carrying out activities to develop a company's marketing strategy (Malhotra, 2010).

Another approach to strategic marketing was pointed by McDonald who identified it as a series of logical steps that have to be worked through in order to arrive at a marketing plan (M. McDonald & Wilson, 2016).

### **2.4.1 Segmentation**

Market segmentation is a process whereby groups of consumers within a market are split up and profiled in accordance with a number of factors that determine the characteristics and tendencies of the market (Bowen, 1998).

Market segmentation in its tactical sense, often refers to such things as the use of particular statistical techniques for identifying groups of potential customers who have similar needs, wants, tastes, and preferences (Hunt & Arnett, 2004).

A major step in the segmentation process is the selection of a suitable base. In this step, marketers are looking for a means of achieving internal homogeneity (similarity within the segments), and external heterogeneity (differences between segments) (Sarin, 2010).

Before determining the marketing mix for each of these categories, market groups for each tourist product must be identified and chosen as the most desirable. Identifying differences that will allow for more precise market segmentation. The strain of competition that would emerge if the destination offered the same goods and services to the same market segments as the competition is reduced by defining the priority markets and, as a result, competitors (Teare et al., 2000).

### **2.4.2 Targeting**

Targeting is the next step after the segmentate on and is the process of identifying the select markets and planning the advertising media used to make the segment appealing (Levens, 2012).

The target market contains buyers with common characteristics that the company decides to serve. There are four main strategic options for companies to decide on targeting (Kotler & Armstrong, 2017). Targeting should be done through effective market segmentation. Having divided the market, the company must decide which segments make the most sense for the business. This includes financial attractiveness and the impact on the quality of operational resources.

The purpose of targeting is to find how many profitable customers segments company can target with a budget they have allocated into key marketing activities (Hunt & Arnett, 2004). In addition to

this, the company needs to evaluate the correct approach that yields the most profit out of the targeted segments (Blank et al., 2012).

Promotion is the business strategy for improved performance to gain sales and customers. It includes advertising activities and promotions of the product and services through social media and other forms of communication (McDonald, 1992).

### **2.4.3 Positioning**

Positioning is the final stage in the 'STP' process and focuses on how our consumers see us and what image do we have in their heads. It also represents our business in comparison to the competitors and plays an important role in gaining a competitive advantage in the market (Klever, 2009). Positioning is how to position the company's product in the mind of the prospected buyer (Ries & Trout, 2001).

Positioning is one of the most powerful marketing systems. Positioning was originally product-focused, and with Ries and Trout has grown to create product reputation and ranking among competitor products. Schaefer and Kuehlwein (2015) extend the concept beyond the material and rational aspects and include the 'meaning' carried by the brand mission or myth.(Schaefer & Kuehlwein, 2015).

Al Ries and Jack Trout (2001) are often credited with developing the concept of product or brand positioning in the late 1960s through the publication of a series of articles followed by a book. Ries and Trout (2001), former advertising executives, published articles on positioning in industrial marketing in 1969 and in the advertising age in 1972. By the early 1970s, positioning had become popular among marketers, especially in advertising and promotion.

Positioning is closely linked to the concept of perceived value. In marketing, value is defined as the difference between a potential customer's assessment of the benefits and costs of one product compared to others. Value can be expressed in many forms, including product benefits, features, style, and value for money (MacInnis, 2011).

The origins of the concept of positioning are unclear. Scholars suggest that it may have originated in the growing advertising industry in the post-World War I period, only to be exemplified and made popular in the 1950s and 60s. The concept of positioning has become very influential and continues to evolve in ways that ensure its relevance and relevance to marketing practitioners.

## **2.5 Marketing-Mix**

According to the AMA, the marketing mix (MM) "refers to the combination of controllable marketing variables that the firm uses to pursue the desired level of sales in the target market" (Marketing Accountability Standards Board, 2021).

As such, it is part of, and informed by, the firm's marketing strategy and implemented by means of concrete actions that utilize various customer-facing instruments and channels (Varadarajan, 2010). Commonly grouped into price-, product-, promotion-, and distribution-related instruments (MASB 2021), the MM is at the core of the firm's activities and processes for the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large" (AMA, 2021).

The original approach to Marketing Mix consisted of 4 elements, and was originally proposed by marketer and academic Philip Kotler & E. Jerome McCarthy (1960). However, firstly the term Marketing Mix was announced and used by Neil Borden in 1964 in his article The Concept of the Marketing Mix. This approach is, so far, the most commonly used approach of all and has a wide range of usage in marketing (Brown et al., 1994).

By having a deeper grasp of the qualities and profiles of both current and potential market segments some of the researches choose a 7P approach which is adds up such qualities as process, people and physical evidence (Ivy, 2008).

It is feasible to connect what the destination delivers and what the market desires by developing a product line that is appropriate for several markets (V. Middleton et al., 2009). As a result, it may be claimed that a portfolio analysis of the markets is an important tool for both public and private tourism organizations since it facilitates judgments on key market segments, positioning, and marketing strategy development.

## **2.6 Marketing Plan**

A marketing strategy may be defined as a plan (usually long term) to achieve the organization's objectives as follows:

- a) By specifying what resources should be allocated to marketing.
- b) By specifying how these resources should be used to take advantage of opportunities which are expected to arise in the future (Kotler, 1997).

A marketing plan is an essential instrument whose main objective is to focus on the planning and tactical coordination of an organization's marketing activities, to achieve the proposed objectives (M. McDonald & Wilson, 2016).

There is also an approach that says that Marketing plan defines the particular actions one plans to carry out to interest potential customers and clients in one's product and/or service and make them to buy the product and/or services one offers (Ward, 2009).

## **2.7 Tourism marketing**

Krippendorf (1971) was one of the first to define tourism marketing as the systematic and coordinated execution of business policies by private or public tourism organizations operating at local, regional, national or international level to achieve optimal satisfaction of the needs of identifiable tourism groups and to generate corresponding profits in doing so.

According to Paynter (1993) define the tourism marketing is a systematic process consisting of a marketing objective, strategies, schedules, marketing means, targeting a specific market segment and based on a substantial return on investment (Dahiya & Verma, 2021).

The World Tourism Organization (UNWTO, 1975) at the seminar in Ottawa defined tourism marketing as a management philosophy that, in the light of tourist demand, makes possible through research, forecasting and selection of tourism products/services from suppliers, in line with the objectives of the organisation and the satisfaction of tourists.

In addition to this, Dickenson (2011) suggests that tourism marketing is the managerial process of anticipating and satisfying existing and potential visitor wants more effectively than competitive suppliers or destinations. The management of exchange is driven by profit, community again, or both; either way long-term success depends on a satisfactory interaction between consumer and supplier (Dickinson et al., 2011).

Local and national tourism organizations typically oversee marketing-related resources and tourism-related activities. These companies have no financial stake in the success of the items they advocate, and they have no direct influence on the development or delivery of new products. Instead of manufacturing unique things for each market, they should discover those with a more competitive supply. According to Mckercher (2003) controlling tourist markets is more important than managing tourist goods. Perdue (1996) defines the huge and immensely diverse tourist market as the set of all existing and future travelers from a certain geographic origin to a place.

In the tourism sector, a destination's long-term viability may be determined by its ability to predict changes in the markets that draw visitors and an in-depth understanding of its competitors. Market portfolio analysis can help you find and carefully evaluate the market categories that the destination is targeting. Although portfolio models are not commonly used in tourist management, Calantone and Mazanec (1991) argue that they can be used by non-profit organizations in the travel and tourism sector.

The management of exchange is driven by profit, community again, or both; either way long-term success depends on a satisfactory interaction between consumer and supplier, none of the current portfolio analysis methodologies can fully address the special criteria of strategic tourism marketing because they are based on the product rather than the market.

According to Middleton and Clarke (2001), the overall tourism market offer might be defined in terms of five main components, namely: destination attractions; destination facilities and services; accessibility of the destination (including transport); images, brands and perceptions; price to the visitor. Thus, the touristic destination is a provider of experiences, and be seen as "clusters" or aggregations of businesses, consisting of mainly SMTEs.

Nowadays, tourism marketing is considered to be a field of a wide demand due to rising customer expectations and growing competition between destinations (Middleton et al., 2009). Tourism marketing is raising into an important field of marketing because most tourism destinations have to

compete on a global level as the world-wide travelling is becoming more common. The dominance of small businesses in destinations and the diversity of objectives in larger organizations is an impediment to the implementation of strategic destination marketing (Scott et al., 2001).

Gössling (2021) pointed out that COVID-19 provided exceptional lessons for the tourism industry, policy makers and tourism researchers. The challenge now is to collectively learn from this global tragedy to accelerate the transformation of sustainable tourism. Ozili and Arun (2020) in their empirical study examined the pandemic situation throughout the economic environment as increased closure days, monetary policy decisions and international travel restrictions have seriously affected the level of economic activity.

### **3. METHODOLOGY**

#### **3.1 Objective of the study**

The following thesis is considered to be a practical roadmap and an applicable to implementation work. For this reason, the objective of this study is to develop an extended marketing strategy and tactics considering all the specifications of the Alentejo region and the regional tourism.

In order to achieve this objective, we used both quantitative and qualitative methodological approaches. Since Casa Pereirinha is a new to the market business it is not possible to use its data base or ant data collected from the customers, however, we use the booking services – Booking.com and Airbnb to collect the feedback and create an extended SWOT analysis, as well as sum up the data to create a consumer portfolio for the analysis.

Thus, we can conduct the following objectives of the research:

- Analyse the market of hotel tourism in the Alentejo Region and analyse the internal characteristics of the project in order to create a SWOT analysis based on the data.
- Develop a Marketing Mix considering the specifications of the region and the business project.
- Create a practically-applicable operational plan that will cover the needs of the business and will help to achieve the marketing objectives within the marketing budget.

#### **3.2 Nature of the research**

The following Thesis contains both qualitative and quantitative methodological approaches.

The marketing research identified by the AMA (2004) and approved in 2017 as marketing research is the function that links the consumer, customer, and public to the marketer through information-information used to identify and define marketing opportunities and problems; generate, refine, and evaluate marketing actions; monitor marketing performance; and improve understanding of marketing as a process (Kohli & Jaworski, 1990).

Quantitative data analysis refers to the conversion of data into information by making use of numerical representations of observation results obtained to describe and explain facts. Statistical techniques are used in the analysis of quantitative data. Choosing the test statistic appropriate to the research model and hypotheses is important to obtain meaningful analysis results (Bilgin, 2017).

In the research we will be referring to the data provided by INE in the tourism sector in Portugal that will give a broad overview on the socio-economic environment in the Alentejo region. The quantitative method is broadly used in the digital marketing analytics and play the core role in optimizing the strategy based on the data provided by analytical services (Saheb et al., 2020).

Verbal communication is used in qualitative research. It is formed from a deductive approach where emphasis is placed on the testing of theory, shaped by empiricist and positivist philosophies (Bryman, 2012). Qualitative research is about interpretation (Strauss & Corbin, 1998; Denzin & Lincoln, 2005), and understanding (Frankfort-Nachmias & Nachmias, 1996). It is “multi-method,” involving the collection and use of a variety of empirical materials (Frankfort-Nachmias & Nachmias, 1996; Silverman, 2013) and approaches (Silverman, 2013; Flick, 2002).

It is very important to note, that qualitative approach has a tendency to be highly subjective because focus on the human’s factor judgements: individuals’ own accounts of their attitudes, motivations, behaviour (Creswell, 2009) events and situations (Bryman, 2003) It will be utilised to understand concepts, events, or thoughts. Given the exploratory nature of the research, focus group and Interviews’ were identified as the most appropriate techniques (Bray et al., 2011). One can learn comprehensive information on subjects that are challenging to understand through this kind of study. Open-ended interview questions, verbal descriptions of observations, and literature studies that examine concepts and theories can be used to common qualitative procedures.

### **3.3 Description of data collection**

In the following Master’s Dissertation, the data was collected in 2 stages. In the first one we gave a brief-questionnaire to the owner of the guest house to obtain the most basic and essential information for the research. The questionnaire is available in Appendix A.

They questionnaire consisted of 28 questions and 3 topics: product, competitive environment and marketing. The responded was able to give an extended answer to the questions in case of a non-disclosure agreement or other reasons.

The main goal of the questionnaire was to develop and overall image of the macro and micro environment of the business from the owner’s point of view in order to be able to proceed to a deeper and detailed research of the topic.

In addition to this the research includes the analysis of the statistics on tourism from INE from 2016 to 2022 years. The main data that was retrieved from the published information were:

- Average Occupancy Rate in Alentejo.
- Overnights and Guests in Alentejo Rate.
- Average Annual Income Per Room in Alentejo.

Moreover, the analysis contains the data of the website traffic in “www.casapereirinha.com” with the geography, browsers, operating system, traffic, look-through and sources.

### **3.4 Description of data analysis**

The information obtained from a questionnaire provided and overall information and helped to create a road-map of the future research. Since the questions were opened the responder had an

opportunity to give and extended information and the opportunity for external communication and clarifying questions. Thus, we used in the Internal and External analyses which resulted in the SWOT analysis. In addition to this we developed an extended marketing mix based on the empirical research method. It was also very essential for the analysis to take into account the customer's feedbacks in order to identify all strengths and weaknesses in the most accurate way.

The missing data on the marketing budget and the previous marketing activities did not allow us to conduct the quantitative analysis of the previous marketing activities, so we based our conclusions of the general budgets in tendencies in the tourism marketing.

The analysis of the reports on the tourism sector given by INE allowed us to create the graphs illustrating the dynamics of the evolution of the tourism sector in Alentejo and gave the opportunity to predict the possible future growth.

A very important part of the analysis was the analysis of the external factors – based on reading the news, articles, projects and other published information. This part is far from being accurate, but it gives the marketing strategists an overall picture of the market's potential and particular qualities.

The last but not the least was the analysis of the quantitative data from the internal company's sources such as website analytics. It provided them data of the customers and the target audience of the project which helped the identification of the audience's interests and triggers.

### **3.5 Sample characterization**

In this research one of the main sources of sampling was a convenience sampling that is a type of non-probabilistic sampling method where the sample is taken from a group of people easy to contact or to reach; for example, standing at a mall or a grocery store and asking people to answer questions (Saunders et al., 2012). As well, the technique of including a diversity of expert opinions from a sample of academics and tourism providers has been used effectively in prior tourism research (Lee et al., 2008) and for this reason the following research adapts both academic and business sources.

In the case of the present research, it was the sampling of the business owners and some of the customers. Due to the fact that Casa Pereirinha does not work with their CRM system and does not keep the track of the feedbacks it was impossible to conduct a detailed survey among the target audience.

The core type of sampling of the Thesis is a case study which Bromley (1986) characterized as is an in-depth, detailed examination of a particular case (or cases) within a real-world context. Case study is a type of the purposive sampling in the category of the nonprobability sampling. Gerring (2007, defines the case study approach as an intensive study of a single unit or a small number of units (the cases), for the purpose of understanding a larger class of similar units (a population of cases) (Slater, 2008).

The case study on Casa Pereirinha we closely work with the "no theory first" type of case study design, which is closely connected to Kathleen M. Eisenhardt's methodological work (Ridder, 2017).

In the sampling took part 3 categories of the audience: the business owners, the customer and the potential customer.

The business owners: the 2 generation of the owners, the older - Diogo Pulido Pereira Freire de Andrade, 58-year-old architect businessmen and an heir to Casa Pereirinha. Traditional Portuguese-lover with slight conservative views, has a family of wife and 2 children, wants to keep Casa Pereirinha as close to the original aesthetic as possible. The younger – Tiago Freire de Andrade, 27-year-old start-up entrepreneur in fin-tech industry, ready for improves and collaborations with a condition of keeping the history of the family and of the house in its original way.

The customers analysed were 2 families, with an age range 28-37, without children. One family are the middle-class managers in Metropolitan Area, do not have kids and like spending weekends outside of the city. The second family is a family of small business owners with a dog, who choose animal friendly places for the vacation.

The last category – potential clients. There were questioned a sole woman working in Lisbon as a support analyst, 26 years old; a family with no children owning a small café, 32-35 years old; a group of friends 27-33 years old, freelancing or in working remotely

### **3.6 Instruments of information collection**

In the informational collection there were analyzed 3 different audiences in order to obtain the detailed picture of the current positioning and image of Casa Pereirinha, thus, we used 3 different types of questionnaires for them.

The questionnaire for the business owners is presented in Appendix A and consists of the marketing and business-related questions to understand their business awareness and marketing inclusion, as well as see their vision of the product and perspectives.

The second target audience was the current customers and the main objective of the research was to analyze their satisfaction with a product. As we did not have a wide range of the respondents due to the absence of CRM system, it was chosen to use an open-question questionnaire to get a broader picture and let the respondents justify their answers.

#### **Questionnaire 2**

1. How many times have you been to Casa Pereirinha?
2. How do you evaluate you travel to Vidigueira and how do you usually travel?
3. How would you rate your trip from 1 to 10?
4. What did you like most about your stay?
5. How would you rate the rooms from 1 to 10 and why?
6. How would you rate your reception?

7. How would you rate the breakfast from 1 to 10 and why?
8. What other activities did you do in Vidigueira?
9. What would you improve?
10. How likely are you to recommend Casa Pereirinha to your friends from 1 to 5, where 1 is “definitely no”, and 5 is “certainly yes”? Why?

The third questionnaire was created for the potential target audience, mainly the younger generation, in order to collect their view and preferences in terms on local tourism and see if your business has the potential in them as in our target audience:

Questionnaire 3:

1. Where do you prefer to spend your weekend?
2. What is your priority in choosing a place to stay? (e.g close to the ocean, entertainments, calmness, good food, close to home, pool etc...)
3. Did you try wine-tasting tourism? What do find most important about it?
4. Do you prefer traditional Portuguese culture or the modern one?
5. What is the most important thing about the guest house for you?
6. Which tourist facilities do you pay attention to most?
11. How likely are you to choose Casa Pereirinha as your next tourist destination friends from 1 to 5, where 1 is “definitely no”, and 5 is “certainly yes”? Why?

### 3.7 Interim Analysis

The survey process allowed us to come to the certain intermediate conclusions about the target audience, as well and strong and weak points of the product.

From the position of the business owner the main conclusions were stated as follows:

- Casa Pereirinha does have a high potential due to the small competition in the area;
- The perspectives on the region mainly rely on the airport’s accessibility;
- The main problem of Casa Pereirinha is the old maintenance, not big enough pool, small number of rooms, absence of own restaurant and the city itself as it does not provide any sort of entertainment to the tourists.

The survey of the current customers brought up the following conclusions:

- The staff in the guest house is very polite and helpful;
- The atmosphere of Casa Pereirinha is charming, however, some furniture is better to be renewed;
- The animal-friendly policy is very important;
- They would not recommend to the families with children, because they did not see the necessary equipment for nursery.
- The territory is very green and it’s very close to the wineries.

And the third group of respondents highlighted the points of the product that can help to attract more audience and broaden the targeting.

- The most important thing about the place they go to is activities;
- They prefer the modern facilities but do not mind traditional design;
- They like wine-tourism in the “all inclusive” bundles where they do not have to think about where to eat etc.;
- They prefer beautiful views to the calmness.

The summary of the conclusions gives us the opportunity to develop the product and adapt it to different generations, as well as work on the weak points of the service.

## **4. MARKETING PLAN**

The marketing plan consist of four main parts:

- Diagnosis of the situations where we make the analysis or micro and macro environments in order to elaborate a SWOT plan;
- Marketing objectives that we will state using STP marketing model;
- Marketing Mix. In this research there will be used a 7P's approach: product, place, price, promotions, people, processes, physical evidence;
- Operational plane. On this stage we will have appropriate knowledge and a reliable analysis to create plans for short-term and long-term actions,

### **4.1 Diagnosis of the situation**

Analysis of the situation is the starting point of delivering a marketing strategy as it helps us to effectively understand micro and macro environment as well as the company's needs.

#### **4.1.1 Internal Diagnosis**

##### **4.1.1.1. Characteristics of the company**

“Casa Pereirinha” is a hotel located in the Municipality of Vidigueira. It is integrated in the local accommodation and rural tourism market since it is positioned in the rural proximity center in the Baixo Alentejo region and Beja District.

Vila da Vidigueira, also known as the “Vila dos Gamas” since it was rewarded by King Manuel I to navigator Vasco da Gama for his discovery of the maritime route to India. He was the first European to reach India by sea. For his discoveries and contributions, he was ennobled Count of Vidigueira. After his death, he was buried in city as he requested, until his body was transferred to Jerónimos in Lisbon. Legend has it that the first bones sent by the locals were from someone else, so that the real ones could stay in Vidigueira. The town is famous by “Terras de Pão, Gentes de Paz”, because of their fantastic Alentejo bread that is produced in a traditional wood oven, and because of the people who live there, who embody the typical Alentejo calmness.

Located in such a peaceful and magnificent region, Casa Pereirinha hotel identifies itself as the perfect getaway place from all the noises and traffic in the crowded cities. The mission of the hotel is not just making the profit, but to spread the philosophy of “Dolce far Niente” – the joy of doing nothing. One of the main values of this place is family, and for this reason, the hotel welcomes all sorts of events and family gatherings – birthdays, weddings, anniversaries.

#### **4.1.1.2. Consumer**

The company must be aware and understand their customers; their needs, wants and demands. That is why many companies put a lot of effort and money into making different kinds of customer surveys analyzing their customers' behavior and learning about the different way of delivering the superior customer value and satisfaction (Kotler & Armstrong, 2017).

Despite the number of foreigners traveling to Portugal and inside the Alentejo region, the main target audience of the project is the Portuguese locals. It is therefore important to identify two key segments of consumers:

- i) Foreigners who travel occasionally, mainly making a road trips around Portugal and stay for 2-3 days.
- ii) Portuguese tourists who come for the weekend, for the event or a small holiday.

The most common age range of the consumers is between 35 and 55 years old, which can be explained by the type of touristic area – Vidigueira. This region does not offer entertainment and infrastructure to attract younger generations. The average income in the city is similar to that of the country or just above that due to the fact that winery tourism is getting more expensive and the tours start from 100 EUR per person on average.

#### **4.1.1.3. Suppliers**

Currently, Casa Pereirinha does not depend on suppliers, but the company is currently in the process of building strong sustainable partnerships with local restaurants and wineries. However, the hotel is presently operating independently.

#### **4.1.1.4. Competitors**

Before we proceed to the analysis it is important to highlight that Vidigueira is not a popular touristic destination and the hotel business is not very evolved. Nevertheless, there are some strong market players to which we shall refer:

The Hotel Unit Competitors can be divided into two distinct groups: i) direct competitors in the region of Baixo Alentejo which include all local accommodation, villas and rural and nature tourism dwellings. Their capacity (number of rooms) is limited to around 10 rooms. Accommodations, regardless of capacity and typology, located in the village of Vidigueira will also be understood as direct competitors. ii) indirect competitors located in the remaining areas of the Alentejo region, such as Alentejo Litoral, Alto and Lezíria.

Table 1. Hotel Unit Competitors

Source: Booking.com

NAME	TPOLOGY	LOCATION	AVERAGE PV (€)	CAPACITY (NUMBER OF ROOMS)
<b>SANTA CLARA HOTEL</b>	Hotel	Vidigueira	60	-
<b>MOONLIGHT</b>	Pension	Vidigueira	74	1
<b>VIDIGUEIRA HOUSES 10</b>	Home	Vidigueira	200	3 bedroom villa
<b>HOUSE NATURE</b>	Home	Vidigueira	200	<i>Villa with 3 bedrooms</i>
<b>GRAINHA HOUSE</b>	Apartment	Vidigueira	75	two

**Santa Clara Hotel:**

Room Amenities:

- Single – Air conditioning; private bathroom; television and free Wi-fi;
- Double – Double bed; Air conditioning; private bathroom; television and free wi-fi;
- Deluxe Double Room – Double bed; air conditioning; private bathroom; TV; Wi-Fi and balcony;
- Twin Room – Single Bed; air conditioning; private bathroom; television and free Wi-Fi.

Services:

- Luggage room;
- Laundry; room service;
- Shared TV lounge/area;
- Laundry; room service;
- Health club and fitness;
- Playroom;
- Free private parking.

Activities/Offers:

- Visit to the Municipal Museum;
- Experience “In the Heart of Alentejo”;
- Visit to Adega Ribafreixo with wine tasting and choice of lunch (Monday to Thursday) or dinner (Friday to Sunday).
- Offer of a day at the local municipal swimming pool

**Moonlight Hotel:**

Room Amenities:

- Double Room – Double bed; air conditioning; flat-screen TV and free wi-fi; private bathroom.
- Fully equipped kitchen at guest's availability;

Services:

- Free parking
- Transport to the airport
- A restaurant on the premise

**Vidigueira Houses 10:**

Villa Amenities:

- Accommodation in a villa with 3 double bedrooms
- Equipped kitchen
- Air conditioning in all divisions of the house; television and free wi-fi
- Living room
- Private swimming pool

Services:

- Free parking
- Transport to the airport
- A restaurant on the premise

**House Natura:**

Villa Amenities:

- Air conditioning in the rooms
- Fully equipped kitchen
- Living room with fireplace and TV and free wi-fi
- Free parking available
- Outdoor swimming pool with seating area and barbecue

- Private bathroom with bath and shower.

### **Grainha House:**

Apartment Amenities:

- 2 Bedrooms with a double bed; flat screen television; free Wi-Fi; balcony and air conditioning
- Dining area
- Equipped kitchen for guests to enjoy.
- Free parking available

## **4.1.2 Porter's five forces analysis**

Michael Porter developed his Five Forces Model and introduced it to the world in 1980 in his first book, "Competitive Strategy"; the model provides a basis to consider the critical forces that impact the company's ability to compete in a market. These forces include existing competition between suppliers, the threat of new entrants to the market, the bargaining power of buyers, the power of suppliers and the threat of substitute products (Porter, 1989).

### **4.1.2.1 Threat of new entrants**

Alentejo is known as the region of high attractiveness for businesses due to its taxation regulation. This region is becoming more popular for investors in governmental funding programs. Together with the development of the region, more competitors are expected to enter the market as there are still many vacancies. However, the entry barrier is still high in comparing with other businesses as it requires not just property business, but following all the touristic guidelines and creating the attractive image and marketing.

### **4.1.2.2 Threat of substitutes**

It is undeniable that there could be potential threat of substitutes, but as was mentioned above, Vidigueira does not have a developed touristic system so that competition is relatively low with not many strong players. Nevertheless, it is important to point out that there is a big part of our clients who chose full-equipped apartments with private kitchen instead of guest houses in order to have more freedom in terms of cooking and serving themselves.

In the other hand, we have part of the consumers who chose hotels only in order to enjoy high quality personalized hotel service with all the facilities, such as gym, room service, etc.

#### **4.1.2.3 Bargaining power of customers**

Due to fast developing tourism sector and the influence of platforms, customers become more aware and selective in terms of looking for accommodation and planning the trip ahead. Nowadays, services provide all the data needed to make the decision and even recommend users certain places if the company paid an additional fee for advertising.

Also, it is important to mention that the purchasing power in touristic sector has been decreasing since February 2020 and the lockdown period with all the restrictions. In 2021 it started improving, but in spring 2022 faced the new crisis – the war in Ukraine that caused crisis for all European countries and followed with the rapid growth of the prices.

#### **4.1.2.4 Bargaining power of suppliers**

Casa Pereirinha does not depend on the power of suppliers as it does not have needs for some certain products and services. The products and services that are used there can be easily substituted without causing any financial damage to the company.

#### **4.1.2.5 Competitive rivalry**

The market is full of competitors and the diversity is huge – from small rooms to high quality hotels.

The industry right now is in the stage of growth and attracting more investments, tourists, and businesses. More investments, new logistic routes, plans to boost the airport in Evora are in development as Beja will help creating a larger touristic flow in the region. There is a distinguishable difference between the hotel and other touristic places. Tourists are not very loyal to brands as they choose the place to stay based on the location, price policy and facilities. However, as we mentioned above, the main consumer is Portuguese clients and locals, who are known for their brand loyalty and conservatism which means that it is possible to win consumers' loyalty and create a long-term lifetime value (LTV).

### 4.1.1 External Diagnosis

In order to complete the External Diagnosis, we will conduct PESTEL Analysis: The PESTEL analysis focuses on political, sociocultural, technological, environmental, and legal factors external to the company. This is the first analysis carried out, both by entrepreneurs and managers, when there is a possible investment opportunity in the company. It is therefore essential that there is a critical in-depth investigation in the collection of data referring to the factors, in order to efficiently maximize the time and resources available. In addition, the PESTAL analysis helps the company to assess the compatibility of its strategy with the environment in which it operates, as well as whether the factors that compose it contribute positively to the development and success of the company in question.

- A) Political factor understands the political situation of local government, which depends on factors such as stability, transparency, and government efficiency.

Currently, the Alentejo region has some political instability generated by the great wave of popular discontent, mainly motivated by the lack of support in the various public and private sectors of the region by the government and politicians in Portugal. This lack of support and investment in the Alentejo are the main causes of several failures and weaknesses in the region. For instance, the lack of structural development in communication routes, not only between the Alentejo municipalities but also between the main district capitals. This clearly affects the level of accessibility in a negative way and demotivates tourists to go there since they prefer places with easier routes and quicker access.

- B) Economic Factor covers the stability and prosperity of economic growth at the local level. For example, if there is a significant change in the Portuguese economy, or even worldwide, the decisions of any company will be affected according to that change.

According to data published in the online newspaper “Sapo”, from 2009 to 2017, Gross domestic product (GDP) per capital in Alentejo grew by 20%. It has been a slow but steady growth that, when compared to the data recorded at national level (around 13%), it is evident that the Alentejo is far above the average. It should also be noted that in the Lisbon Metropolitan Area, the GDP is around 4.6%.

Therefore, based on these values, we can conclude that the Alentejo is a region in a prosperous phase at an economic level, which creates investment opportunities for local companies.

It is also essential to refer our research to the National Institute of Statistics in Portugal and research Alentejo region more precisely.

### i. Average Occupancy Rates in the Alentejo Region

The graphical representation of the data referring to the annual average occupancy rate, corresponding to the period from 2016 to 2020, in the Alentejo region, allows us to visualize a constant and stable growth over the years represented, with the clear exception for the year 2020.

This discrepancy in values in the Occupancy Rate in 2020 was due to a pandemic of worldwide proportions (COVID-19) that led to a large decrease in tourism demand and in all activities that are inherent to it. Therefore, it was an exceptional year and for this reason it should not be interpreted separately. In 2021, we can see the improvement of the situation and we believe that in 2022, it would reach above 40%.

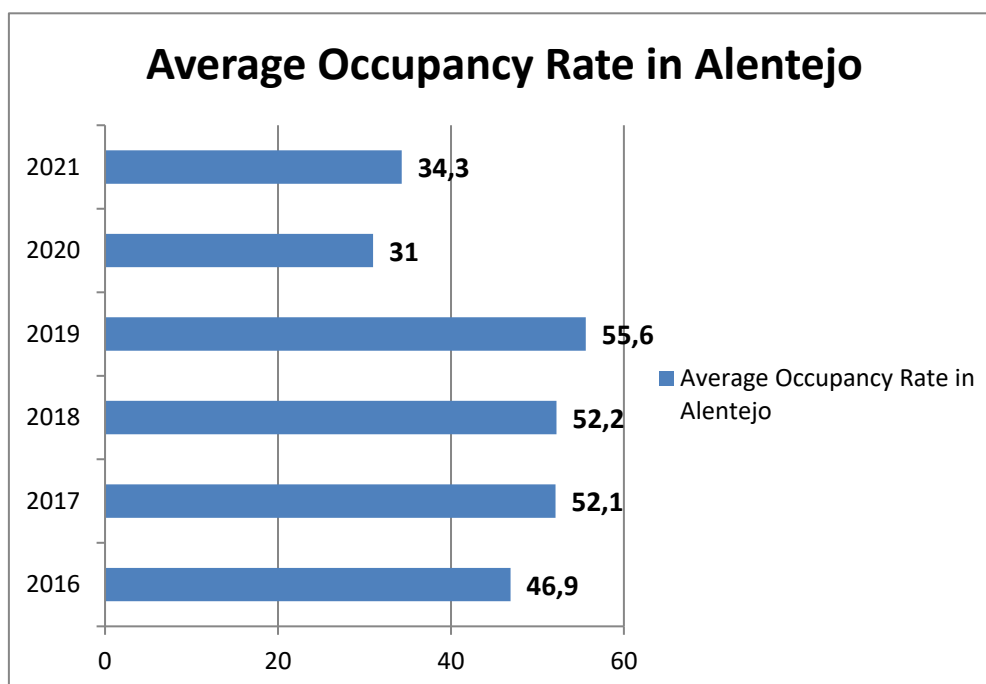


Figure 1. Regions in Alentejo with the highest Average Annual Occupancy Rate (2018).

Source INE, PORDATA and Turismo de Portugal

### ii. Overnights and Guests in Alentejo

From 2016 to 2019, there was an increase in both the number of overnight stays (nights) and the number of guests in local accommodation and rural tourism in the Alentejo region. In 2020, as expected, there was a decrease in both variables due to a lack of generalized tourist demand resulting from the world pandemic (COVID-19).

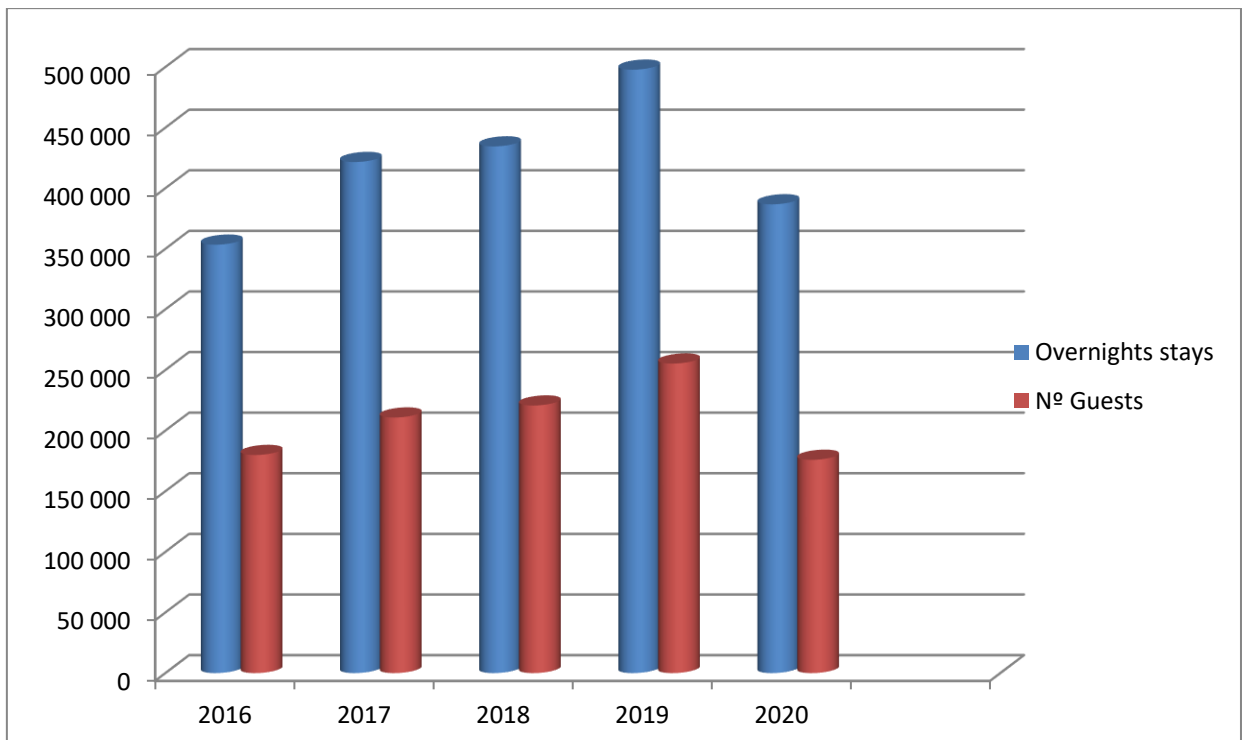


Figure 2. Overnights and Guests in Alentejo Rate (2020).

Source: INE, PORDATA and Turismo de Portugal

### iii. Income from tourism in Portugal and the Alentejo Region

Average Annual Revenue Per Room represents the average profit earned by accommodation for a room booked over the course of a year. In this specific case study, the values presented are related to typologies similar to those in which Casa Pereirinha is inserted, local accommodation, housing and rural tourism.

The profits obtained by the accommodation per reserved room are one of the most important indicators when analyzing a hotel, as it is through its calculation that it is possible to measure the profitability and the success of the accommodation sales. Bearing in mind that the local accommodation in the case study does not yet have a relevant database, we will only analyze the average annual income per room of similar units, both nationally and locally.

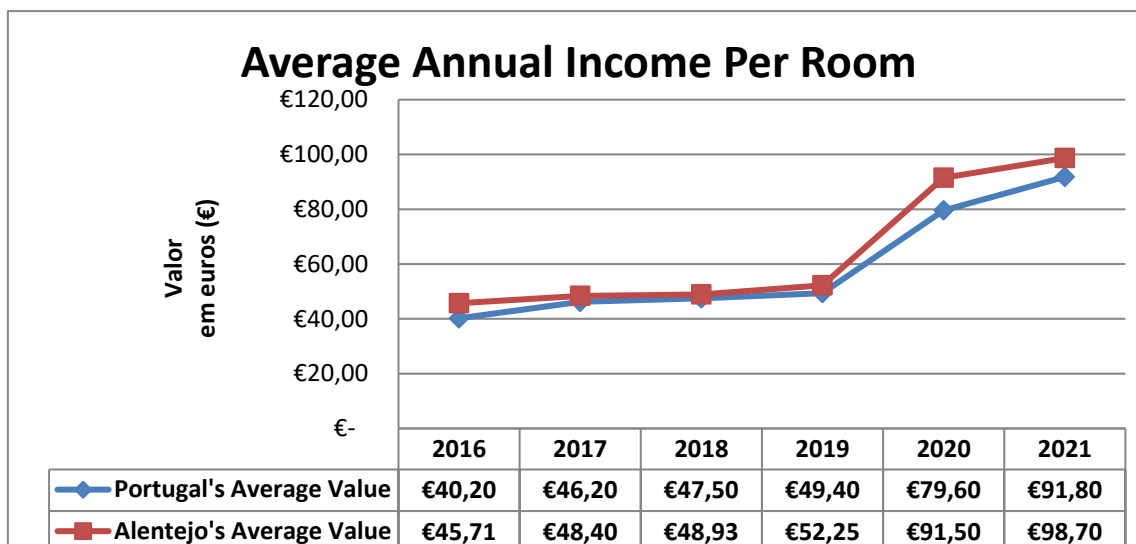


Figure 3. Average Annual Income Per Room in Alentejo.

Source: INE, PORDATA and Turismo de Portugal

C) Sociocultural Factor presents the culture, attitudes and customs of the population as important factors for the company's performance, which can use them to create or improve its strategy in order to achieve its goals and objectives. This strategy should be adapted to the place where it is inserted.

In general terms, it can be said that the entire Portuguese population is aged, and this statement takes on increased importance in regions such as the Alentejo where the vast majority of the population is already at or close to retirement age. In addition, many of the local residents are people of low or middle income, which can create obstacles to the dynamization and modernization of industries.

However, these factors alone do not negatively affect the company since there are other aspects to consider that also strongly influence local accommodation, such as culture.

Culturally, Alentejo is one of the richest areas in the country, which is largely due to the resident population which has always sought to preserve its customs and traditions passed down from generation to generation. And that is especially why it is such a rich area and with so many opportunities for exploring cultural and rural tourism that have grown exponentially over the years.

Therefore, the Alentejo population can be an asset to local accommodation. Because they will relate well with guests as they are distinguished by their kindness and hospitality that can be transmitted through sharing stories and knowledge about the region, which will certainly enrich the overall experience of tourists staying at the accommodation.

D) Technological Factor represents current technological development. This development interferes with the organization's performance in the aspect in which it can either maximize its performance or harm the company's functioning if it becomes obsolete.

Currently, regarding the use of technology, and especially in a country like Portugal, it is still important to distinguish certain aspects of modernization in the different regions, despite the fact that they no longer present as many disparities as they did a few years ago.

Specifically, in the Baixo Alentejo region where the accommodation is located, technological development has been gaining ground and creating large and significant improvements in business infrastructure, such as online payments, public transports, social media etc.

E) Environmental Factor notes the importance of both environmental and ecological factors. Especially in the first decade of the 21st century, sustainable business practices were born, which encouraged a more generalized use of an updated version of the PESTEL framework, which now includes the environmental factor.

Local accommodation has a clear concern with environmental preservation and the environment of the region in which it operates, since it is also a unit that promotes rural and nature tourism.

This concern is clearly visible through the numerous practices carried out daily, such as, for example, waste management favoring recycling and reuse of materials, energy savings by using low-consumption light bulbs.

However, for the time being, the unit has not yet invested in flow reduction systems that help to save water, nor in the installation of solar panels, but this could be something planned in the near future.

F) Legal Factor which incorporates the laws and regulations imposed by the local government and other regulatory institutions and determines whether these legal diplomas are favorable or not to the practice of the organization's activities. The company needs to assess these points when faced with entering and/or staying in a new market.

In terms of the legal environment, the government implemented a program that establishes the need to adopt a tourism law that enshrines the guiding principles and the objective of a national tourism policy. This need is due to the growth of tourism, in order to defend rights, but also to constitute the duties of institutions.

As for the general principles, the environmental, social and economic sustainability of tourism is reaffirmed, the sector's transversality is highlighted, which makes the articulation of the various sectoral policies essential, it is committed to guaranteeing the competitiveness of companies and

free competition and the participation of those interested in the definition of public policies is ensured.

In short, companies must comply with the laws, insofar as they must know them and adopt them in order not to go against them.

#### 4.1.2 Strategic Potential Analysis (SWOT)

Carrying out such an analysis can be useful to be able to identify opportunities and threats. This is particularly important since tourism companies are facing an increasingly turbulent and dynamic business environment, which has been exacerbated by the COVID-19 pandemic (Dolnicar & Zare, 2020).

Table 2. SWOT Analysis

Internal environment	
Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Located in the city center.</li> <li>• Rooms are modern furnished.</li> <li>• Pool and place for patio.</li> <li>• Breakfasts included.</li> <li>• Affordable price.</li> <li>• Parking available.</li> <li>• Good Wi-Fi.</li> </ul>	<ul style="list-style-type: none"> <li>• The house is not very modern.</li> <li>• No restaurant in the House.</li> <li>• The pool is not big enough if all the rooms are occupied.</li> <li>• Only 4 rooms for guests.</li> <li>• Located far from the ocean.</li> <li>• No extra source of traffic (no partnerships or collaborations)</li> </ul>
External environment	
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Completing the project of the railway from Lisbon to Vidigueira.</li> <li>• Developing the airports in Beja and Evora to create a better touristic flow.</li> <li>• Good climate.</li> <li>• The best wineries of the region in the neighbourhood.</li> <li>• Great restaurants in the area.</li> </ul>	<ul style="list-style-type: none"> <li>• Vidigueira is not a very popular touristic place.</li> <li>• No public transportation to wineries.</li> <li>• No shopping centers or any other entertaining activities.</li> <li>• Aging population of the region and no events or attractive festivals.</li> <li>• More competitors entering the market.</li> <li>• Evora and Beja are more appealing to tourists than Vidigueira.</li> <li>• The downfall in the purchasing power of our target audience.</li> <li>• Lack of investments to the region.</li> <li>• Tightening of the tax regime.</li> </ul>

	<ul style="list-style-type: none"> <li>• Droughts in the region that will cause crisis among wineries.</li> </ul>
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All these factors shall have a serious impact on the strategy we are developing. A lot of weaknesses of Casa Pereirinha are not possible to overcome on its own as it affects governmental control and a big investment flow. That could be a great opportunity for attracting more public attention to the problem of regional tourism and the importance of the stable investment flow to the local businesses.

The current weaknesses of Casa Pereirinha demand the raise of budgets due to the cost of the maintenance of the old rooms, creating the new ones, redecorating the pool. The weakness that requires a high level of attention is the lack of traffic which can be fixed by creating the net of partnerships in the city, nearby wineries and build a stronger brand awareness among the target audience.

The main opportunity for the brand right now is to develop the wine-tourism together with restaurant guide. It is very important to find the right source of distributing this information to the large audience and make partnerships that would be bilaterally profitable.

The main threat, as it seems, would be the lack of the tourist attention to the region which causes the main problem with a tourist traffic for local businesses. It is important for the ministry of tourism to create such venues, events and activities in each region so that the tourist traffic would be provided on the regular terms.

What is clear from the analysis is that one of the most important instruments we can use for marketing in Casa Pereirinha is to create the awareness of the regional tourism, create strong and attractive partnerships as well work of the DNA of our brand and reputation.

## 4.2 Marketing objectives

Touristic sector is fast growing sphere and, due to this fact, we will present short-term and long-term objectives. It will help us to use a SCRUM (Schwaber & Sutherland, 2017) approach to plan the strategy implementation. Based on our values and the analysis we present the short-term objectives for 1 year as following:

O1 – To increase the reach and the engagement on the Instagram account by 1000%.

O2 – Increase the number of followers to 2000 users.

O3 – Reach a monthly conversion rate of 17% for the featured Ads.

O4 – Prolong the LTV of the customers.

O5 – Optimise the search engine on the website and increase the rate in the Google Search.

O6 – Create minimum 2 substantiable collaborations with local businesses.

O7 – Increase the number of new visitors by 35% and organize minimum 3 events.

In long-term objectives, 5 years planning, we suggest the following objectives:

O1 – Open 12 new rooms (right now we have 5).

O2 – Build collaborations with restaurants and develop a special voucher system.

O3 – Reach 10.000 followers on Instagram.

O4 – Create a blogger community around our business.

O5 – Take part in collaborative events from the Portugal Ministry of Tourism to spread brand awareness.

### **4.3 Strategic marketing**

Segmentation helps us to develop the relevant profile of the market we are working with and to create the best strategy according to it.

It is important to be able to accurately predict sales and build a sales strategy, and for this reason we need to understand the needs of consumers. Therefore, in order to segment the market, we can unite people into groups with similar needs, requirements and interests. You can group by:

- geography - country, region, city or another geographical feature;
- socio-demographic features - age, occupation, income, marital status;
- behaviour - lifestyle, interests, habits, opinions;
- desired benefits - confidence, status, security (Kotler, 1997).

These are only the basic categories of the possible segments. Depending on the market, their number may vary, and, the research itself helps us identifying the new groups of consumers.

#### **4.3.1 Segmentation**

Casa Pereirinha was opened to tourists for less than a year and because of this we do not have a CRM system of clients which would allow us to make an appropriate analysis of the consumers,

Due to this reason, we will base our segmentation analysis on the knowledge of the market and the interviewing the management if the Guest House.

As it was mentioned above, we will start from 2 main segments – foreigners and Portuguese tourists. This factor will depend on the type and language of content and communication, as well as the advertisements we will use for targeting.

The geographical segmentation for tourists will be: Northern Europe, United Kingdom, USA, Eastern Europe.

For the second category of the consumers, it is important to be more precise in the analysis in order to optimise marketing budget on targeting (Kamakura, 2000).

For the Portuguese tourists it is mainly Lisbon area and central Portugal. Based on statistics Portuguese tourists from the north chose the winery tourism in their own region and prefer ocean vacation on the south of Portugal.

Thus, the main target audience in Portugal will be located in Lisbon, Faro, Leiria, Coimbra, Aveiro, Portalegre, Santarem, Setubal and Catelo Branco. From which the key cities will be Lisbon, Setubal, Grandola, Santarém, Peniche, Leira, Castelo Branco, Portimão, Faro and Albufeira.

Secondly, we must elaborate the age range. The most appropriate age segments are 28-35, 36-48, 48-56, 57+.

The winery tourism implies the consumers with the average or above the average income, mainly the couples because Alentejo is a quiet and peaceful region that cannot offer much on an entertainment such as clubs, festival and other events.

However, we must never exclude the percentage of tourists who travel in companies.

It can both freelancers, people with stable job and entrepreneurs. What is more, it is believed that besides wine tourism Alentejo attracts people with remote work for a temporarily or permanent resediment in there.

Vidigueira mainly attracts people who like calm and peaceful pastime, as this region cannot offer many sports or hiking activities. Casa Pereirinha can offer high level of security and privacy as well as the atmosphere of the desired by tourists' Portuguese culture.

Table 3. Marketing Strategy Segmentation

Segmenation			
Foreign tourists		Portuguese tourists	
Northern Europe, United Kingdom, USA, Eastern Europe		Lisbon, Setúbal, Grandola, Santarém, Peniche, Leira, Castelo Branco, Portimão, Faro and Albufeira.	
Age range			
28-35	36-48	48-56	57+
Income			
average		above average	
Maritial status			
single - travelling with friends		with a partner + family tourism	
Interests			
wine-tasting, wineries, Portuguese kitchen, dolce far niente, Portuguese culture, Alentejo, exploring Portugal, family time castles.			

Source: Author's own elaboration

### 4.3.2 Targeting

Casa Pereirinha shall target mainly at people at the rage range 36-56 from Portugal (the nearby regions). We can see in the analytics of the website that proves Portuguese-oriented specification of the following business.

▶ PT	Portugal	588 (81.0%)
▶ US	United States	29 (3.99%)
▶ ES	Spain	23 (3.17%)
▶ DE	Germany	18 (2.48%)
▶ FR	France	14 (1.93%)
▶ BE	Belgium	8 (1.10%)

Source: SquareSpace analytics

Figure 4. Figure Traffic segmentation by geography of www.casapereirinha.com .

Our perfect consumer will be a citizen of Lisbon, working in the company and enjoying Portuguese culture and love spending time with family and friends. He may travel to Alentejo for a change from work and crowded city, so he chooses some calm and authentic places with nice wineries nearby.

Also, our target audience uses cars to go to places, like authentic places, relaxed vacation routine and peaceful gatherings.



Figure 5. Lisbon Citizen

Source: Author's own elaboration

### 4.3.3 Positioning

Casa Pereirinha's main objective is to be for its consumers the "island of peace" where they can always escape from their daily routine and worries. Casa Pereirinha is about "Dolce far Niente" or the joy of doing nothing – the main theme of Alentejo region.

This guest house is for people who value relationship, family and emotional intimacy. The place that teaches you slowing down, spending time with yourself and enjoying the moments of simple life.

For our target audience it is important to have the fast and direct communication with the owners, with whom you can agree on all the personal matters and find the best solution. Casa Pereirinha's very strong characteristic is the staff – very polite, helpful. The questioning the second category of respondents they mentioned that this place make you feel like "childhood and grandmother's house".

Most of the modern megapolis-citizens do not have the luxury of the countryside house, and Casa Pereirinha can become one for them.

In addition to this, Casa Pererinha is located only 2,5 hours from Lisbon which makes it a perfect escape place and a wonderful destination for a "family trip". It's located in the heart of Alentejo, but it is cheaper than the guest houses of the same level in Evora or Beja. So when the consumer is planning the trip to Alentejo he chooses the most advantageous in terms of the price-location-service offer.

### **4.3 Marketing Mix Policy**

The objective of the marketing mix utilised by the Casa Pereirinha in Vidigueira is to draw clients or visitors to the place, thing, or service that the tourism firm plans to sell them. The seven components of the travel and tourist industry's marketing mix are the following: product, place, price, promotion, people, processes and evidence.

#### **4.4.1 Product**

Our product can be defined as a complex of hotel services.

Hotels sell goods such as room service, banquet halls, restaurants, parking lots, and the labor. The service must meet the wishes of the guests. The offer of hotels is based on the definition of a potential category of guests and on their wishes to receive one or another set of services. It is also very important to take into account the fact that many hotels serve several market segments at once, for example, businessmen who require decent secretarial services; business groups expect to have comfortable banquet halls for negotiations, and couples hope to enjoy entertainment programs and a relaxed atmosphere. Therefore, when we talk about a product as a constituent element of the marketing mix for the hotel industry, we must distinguish between a product that takes a physical form and services that are aimed at meeting the needs of customers associated with their stay in a hotel.

The set of products provided by Casa Pereirinha can be identified as:

- Hotel service for guests.
- SPA service.
- Event venue.
- Weddings.
- Resto-bar service.

Forward to Appendix B to see the presented services.

#### **4.4.2 Place**

The following service can only be obtained in Casa Pereirinha itself in Vidigueira. It is located in the historical center of the city by address: Doutor António Carlos Da Costa Street, 26.

The location is easily reached by car or by the buses, presented by FlixBus and Rede Nacional Expressos transport services.

As it was aforementioned, the bright perspectives of the developing of Beja and Evora airports would play a significant role in the boosting the tourist traffic to the region.

Casa Pereirinha presented on such booking platforms as Booking.com and Airbnb. In addition to this, it has a website that allows the direct messages to the manager with the booking option.

As well, the Guest House is presented on the Instagram Platform “@casa\_pereirinha” where customers can leave their feedbacks, ask questions and do the booking through direct messages or by the call.

#### 4.4.3 Price

The pricing policy for the tourism sector plays a significant role in the decision-making process.

In Alentejo tourism industry, pricing is a key component of the marketing mix. Pricing must be set up to be competitive with any rivals offering the same service or a comparable alternative service.

Casa Pereirinha has a competitive price among the other hotels and guest houses in Vidigueira and offers us the best result in the price-quality ratio:

Table 4. Price Policy in Vidigueira

VENUE	PRICE PER NIGHT
CASA PEREIRINHA	80 EUR
MONTE DO MATO DOS HOMENS	80 EUR
CASA DA MATRIZ	85 EUR
CASA GRAINHA VIDIGUEIRA	47 EUR
MOONLIGHT	41 EUR
HOTEL SANTA CLARA	52 EUR
CANTO DO ROSSIO	30 EUR

Source: Booking.com

Casa Pereirinha has special offers for the event planners and have private approach to clients. For this reason, it is more relevant to talk to the manager before booking the room online.

This may not be very convenient, but this is one of the aspects of traditional businesses in Portugal where real communication dominates over online connections.

#### 4.4.4 Promotion

Promotion plays a key role in the marketing mix for Casa Pereirinha. It encompasses all strategies used by the business to promote and sell its products and services.

In the marketing of consumer goods, the main goal is to ensure that goods are available to the consumer, to know when, where, in what quantity and in what range they are needed. These problems are eliminated in the hotel industry, where rooms, restaurants and other services are the goods themselves. Nevertheless, distribution channels in the hospitality industry can be divided into

direct and indirect. Direct channels include mail, phone calls and fax, while indirect channels are represented by intermediaries, namely travel agents, tour operators and independent hotel agents.

The main channels of Casa Pereirinha’s promotion would be Contextual Advertising, Paid Search in Booking.com, Airbnb, and Instagram.

Due to the analysis our consumer and the target audience we can conclude that TikTok would not be the main source of promotion due to the age and interests of the audience, and Facebook does not fully comply with our target goals. However, Facebook would be an irreplaceable instrument for building the brand awareness among the Portuguese tourism sector.

Touristic sector is widely promoted on the Instagram which even created a definition “instagrammable” – the way to describe the place that looks attractive in the pictures. This Social Media is the main tool to spread the brand awareness among potential customers.

The table below presents the promotion instruments that would serve the stated objectives:

Table 5. Promotion tools.

<b>Objective</b>	<b>Tool</b>	<b>Actions</b>
To increase the reach and the engagement on the Instagram account by 1000%.	Elaborate more UGC content, Influencers collaborations, Reels and TikTok Production, Viral content	Create key unique features of the place, develop the new TOV and enter into partnerships with Portuguese content creators.
Increase the number of followers to 2000 users.	Facebook Ads, Give-aways, Partnerships, Influence – marketing.	Create a give-away with winery for “wine-tasting” weekend in Vidigueira. Promote the give-away and the offer for a weekend bundle in Facebook and Instagram Ads.
Reach a monthly conversion rate of 17% for the featured Ads.	Design, Content creation.	A/B tests for the best ads and target audience with a budget 30-70 EUR per day.
Prolong the LTV of the customers.	CRM system, surveys	Collect the contacts of the guests and create personal promotion offers: congratulation with birthdays and holidays, reminders to visit Casa Pereirinha.

Optimise the search engine on the website and increase the rate in the Google Search.	Square space, Google Ads	Optimise the key search words and the texts for the frequency. Launch paid search.
Create minimum 2 substantiable collaborations with local businesses.	Facebook, Instagram	Start from tagging other businesses and create a trusted image. After that offer a collaboration for the profit for both parties.
Increase the number of new visitors by 35% and organize minimum 3 events.	Facebook, offline-marketing, e-mail marketing.	Enter the pages for tourism and event creation, offer a partnership to them in exchange for promotion. They would give us the leads and we would pay a % from each event.

Source: Author's own elaboration

#### **4.4.5 People**

Spend money on hiring staff that has the traits of a quality tour guide. The public faces of your business are your employees and your tour guides. They have a significant impact on how satisfied your customers are and how well they will speak of your company. Hiring enthusiastic and energetic tour guides will help you expand your customer base and improve your visitors' overall experience.

Casa Pereirinha – is a family business which became the business itself just recently. The owner of the Maison is currently the head of the family - Diogo Pulido Pereira Freire de Andrade.

His son – Tiago Freire de Andrade is the one responsible for handling communication right now, and in the future will take over the business and will be responsible for its growth.

There are people who permanently work in Casa Pereirinha and take care of the guests' comfort and experience. These are: hosts, cleaning service, cooking team, pool service, massage specialist, etc.

The last but not the least is the new team member – PR and marketing manager who is responsible for creation a strong business identity and increase brand awareness.

#### **4.4.6 Processes**

How well the clients are served will depend on your processes. Convenient procedures will benefit your clients as well as your staff. It ensures that all corporate procedures and operations go off without a hitch. The process point is especially important in the hotel business, because it covers many points of contact with a customer:

- Booking process.

- Cancellation policy.
- Check-in process.
- Check-out process.
- Cleaning service.
- Etc.

The process of delivering the service ends only when the client checks-out with a positive feedback. It is very important, because, if the feedback is negative, we ought to continue our communication with a client in order to increase his level of satisfaction.

In order to make the booking management process easier many sources recommend an online booking service like Rezdy booking service to automate the management of your processes. Customers can make reservations based on real-time availability using software like Rezdy, and your manifests will be updated immediately. By doing this, it will be possible to manage resources effectively and make sure that everyone is aware of impending reservations.

Currently Casa Pereirinha is in the process of integration the Smoobu as a vacation rental app this easily integrated with other services and offers a user-friendly interface.

A Hotel business is interested in direct booking of their services from their own website not to pay a commission to the services (Booking, Airbnb) which can reach up to 50% from the booking.

For this reason, it is important to integrate a booking system on the website together with the payment systems. Nowadays Portuguese residents prefer to proceed payments by MBway, which is very fast and secure.

#### **4.4.7 Physical Evidence**

Physical evidence is an important part of the product. However, as we mentioned before, the product of Casa Pereirinha – is the service, or, to be precise, the mix of service and facilities.

Currently Casa Pereirinha does not have branded product or the tangible branded items. Right now, the business is in the process of creating a collaboration with a local wineries to offer the clients the welcome gift – branded wine from the local vineyards.



Figure 6. Branded bottle of wine Casa Pereirinha

Source: Author's own elaboration

The rooms and the territory of Casa Pereirinha are presented in Appendix B and Appendix C.

## **4.4 Operational plan**

Operational plan is set of actions within a deadline that are ought to be taken in order to achieve the specific marketing objectives stated in the strategy. Operational plan can be elaborated in any convenient for executive team way. In the case of Casa Pereirinha was chosen a sprint-approach (Schwaber, 2004).

### **4.4.1 Specific Objectives and Short-Term Actions**

In the previous chapter the marketing objectives for Casa Pereirinha in the short-term period were stated as follows:

O1 – To increase the reach and the engagement on the Instagram account by 1000%.

O2 – Increase the number of followers to 2000 users.

O3 – Reach a monthly conversion rate of 17% for the featured Ads.

O4 – Prolong the LTV of the customers.

O5 – Optimise the search engine on the website and increase the rate in the Google Search.

O6 – Create minimum 2 substantiable collaborations with local businesses.

O7 – Increase the number of new visitors by 35% and organize minimum 3 events.

For the convenience we can combine O1 and O2 due to the equal platform and the tools used for achieving these objectives.

- i. O1 – To increase the reach and the engagement on the Instagram account by 1000%.
- O2 – Increase the number of followers to 2000 users.

In order to achieve the following objectives, we shall start by stating a TOV of the project and elaborate the design and the mood-board the Social Media.

The stated TOV: chilled and relaxed conversation with a friend, happiness is peace and the real feeling of life can be obtained in dolce far niente. We want our customers to get out of the rush and stress, we are caring and gentle guides who remind them about what is really important.

The positioning, segmentation and targeting was identified before, so the next step would be the creation of references.



Figure 7. Casa Pereirinha's mood-board

Source: Author's own elaboration

After the mood-board we proceed to content-plan, Instagram planning and copywriting.

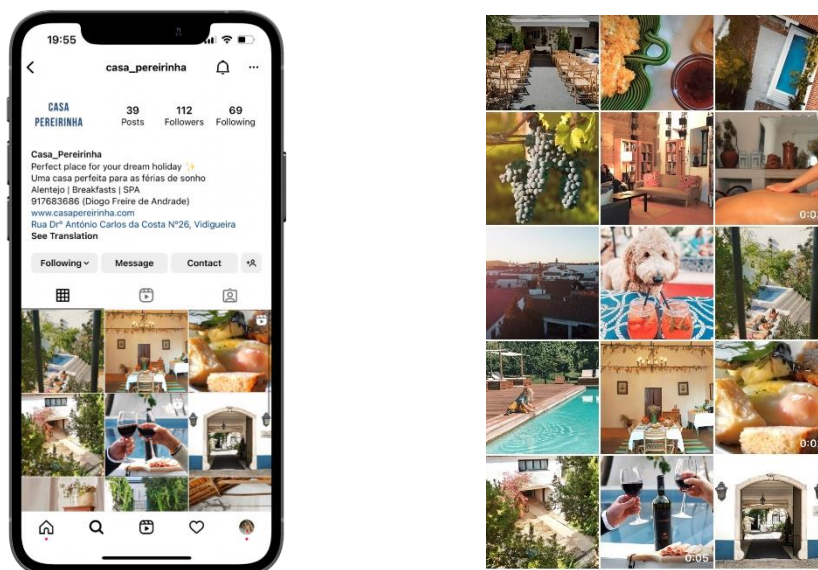


Figure 8. Instagram feed

Source: Author's own elaboration

After the account packaging, we can proceed to the other marketing tools such as: UGC content, Influencers collaborations, Reels and TikTok Production, viral marketing.

Very important aspect of Social Media marketing in 2022 is content creation as the audience becomes more demanding and judgemental to the businesses Social Media accounts, and for this reason we must create the technical task for each photoshoot. The example of the photoshoot road-map in the Appendix D.

- ii. Reach a monthly conversion rate of 17% for the featured Ads.

In order to achieve the following objective, it is required to hire a targeting specialist and provide a monthly budget for testing campaign and for targeting promotions.

It is important to divide this objective into steps:

1. Analysis of the audience.
2. Competitor analysis.
3. Indicate the advertisement objectives: reach, leads, traffic etc.
4. Offer creation.
5. Design of marketing advertisements (not less than 4, depending on number of campaigns).
6. Creation of campaigns for A/B testing.
7. Optimisation of campaigns and analytics.

iii. Prolong the LTV of the customers.

This objective has a very prolonging effect, but approximately we can achieve this goal in a 6-month long period by working with the CRM system and rely on the client orienting techniques and instruments.

iv. Optimise the search engine on the website and increase the rate in the Google Search.

The achieving of this goal may take around 3-4 months and will depend on the medium CPC and CPV in the region.

The focus should be on the mobile-users of Google Chrome and Instagram as it is visible from the table of the website analytics:

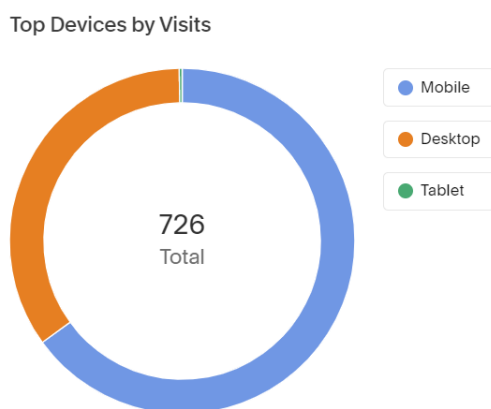


Figure 10. Top devices by Visits

SquareSpace analytics

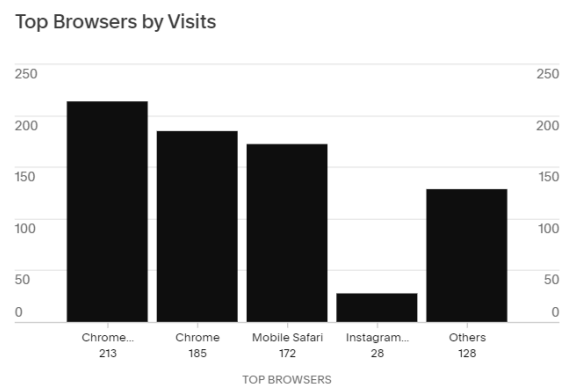


Figure 9. Top Browsers by Visits

SquareSpace analytics

- v. Create minimum 2 substantiable collaborations with local businesses.

This Objective has the “season” element which means the local businesses have the tendency to be more active in the warm time of the year which will postpone the implementation of this actions till May 2023. However, the period before that can be effectively used for the preparation for the hot tourist season.

- vi. Increase the number of new visitors by 35% and organize minimum 3 events.

This objective requires a sustainable and respected brand identity in order to increase the trustworthy image in the eyes of the counterparties

Table 6. Short-term Objectives

OBJECTIVE	ACTIONS	MARKET MIX VARIABLE	WHEN	COST
<b>O1</b> - Increase of the reach and the engagement on the Instagram account by 1000%	<b>A1.</b> Hire a Social Media Marketing manager	Promotion & People	Monthly	€ 550
	<b>A2.</b> Content Production (photo, video, reels)	Promotion	Every 3 months	€ 250
	<b>A3.</b> Develop the new TOV and connection with the audience	Promotion	Sep to Oct	€ -
<b>O2</b> - The number of followers in Instagram - 2000 users	<b>A4.</b> UGC content strategy	Promotion	permanently	€ -
	<b>A5.</b> Influence-marketing	Promotion	Apr-Aug	€ 300,00
	<b>A6.</b> Create a giveaway with partners	Promotion	Oct to Nov	€ 400
<b>O3</b> - Monthly conversion rate of 17% for the featured Ads	<b>A7.</b> Develop a targeting strategy and a selling offer	Product	Feb to Aug	€ 3 600
	<b>A8.</b> Marketing analytics of the best offer	Product	Mar to Aug	€ -
<b>O4</b> - Prolongation the LTV of the customers.	<b>A9.</b> Working with CRM system (client base)	Promotion	Monthly	€ -
<b>O5</b> - Optimise the search engine on the website and increase the rate in the Google Search.	<b>A10.</b> Improve a SEO strategy	Product	Every 2 months	€ 200,00
	<b>A11.</b> Apply Google Adwords	Promotion	Monthly	€ 100,00
<b>O6</b> - Create minimum 2 substantiable collaborations with local businesses Build new partnerships	<b>A12.</b> Create an appealing partnership offer	Product	Jan-Feb	€ -
	<b>A13.</b> Negotiating partnership conditions	Product	Jan -Apr	€ -
	<b>A14.</b> Implementing the collaboration in the marketing strategy	Product	Apr - Aug	€ -
<b>O7</b> - Increase the number of new visitors and organize minimum 3 events	<b>A15.</b> Create a partnership with event planners or/and even agencies	Promotion	Apr to Aug	€ -

**Total (Sep 22 – Aug 23) = € 14000**

#### 4.4.2 Specific Objectives and Long-Term Actions

The specification of the tourist business has a high frequency of changing environment, and according to this it is challenging to predict the situation in 5 years for a small business.

However, any business ought to have a plan a long-term action strategy in order to have an overall vision and the direction of growth.

The long-term objectives of Casa Pereirinha were stated as follows:

Table 7. Long-term Objectives

OBJECTIVE	ACTIONS	MARKET MIX VARIABLE	WHEN	COST
O1 - Open 12 new rooms	A1. Negotiation with the neighbors about the purchase of the rest of the building	Product	-	€ -
	A2. Design plan for the new accommodation	Product	-	€ 1000
	A3. Repair works	Product	-	€ -
O2 - Create collaborations with restaurants and develop a special voucher system	A4. Create an appealing partnership offer	Product	In 1 year	€ -
	A5. Negotiating partnership conditions	Promotion & Price	In 1 year	€
	A6. Implementing the collaboration in the marketing strategy	Promotion & Process	In 1 year	€
O3 - Reach 10.000 followers on Instagram	A7. Social Media Marketing	Promotion	monthly	€ 550
	A8. Instagram Ads	Promotion	monthly	€ 500
O4 - Create a blogger community around our business	A9. Influence marketing	Promotion	Every 3 months	€ 300
O5 - Take part in collaborative events from the Portugal Ministry of Tourism to spread brand awareness.	A10. Join program for regional tourism promotion	Product	2 years	€ -
	A11. Take part in national programs	Product	2 years	€ -

The budget for the long-term actions is not accurate because it is hard to predict the prices in the market due to the economic instability and the inflation rate.

## 5. CONCLUSIONS, LIMITATIONS AND FUTURE RESEARCH LINES

The objective of the research, which was developing a practically applicable marketing strategy, was successfully reached. It is a very important point at this case because the main goal was to make the strategy useful for the Casa Pereirinha business owners and help them to expand their business and show both weak and strong features of it.

Touristic business is a rapid changing economic sector that has a high volatility as it is not the first or even second priority need for people.

In this research we conducted a deep and detailed analysis of the tourism in Alentejo and Vidigueira which was essential to understand the macro and micro environment of Casa Pereirinha guest house. Most of the actions are centered alongside the Digital Marketing domain due to the dynamic of this marketing field and the priority of our consumer's presence in the digital field. In addition to this, digital marketing requires less personal involvement from the business owners and can be operated by the independent team which can help to reduce the cost while improving the quality and the results. +

However, the research has certain limitations:

- i. Casa Pereirinha does not have a big experience in the market which limited the data for the analysis, such as LTV of the consumers, marketing KPI and analytics of advertisements.
- ii. Some of the data is (such as financial documents) confidential, and for this reason the marketing budget is not adapted to the actual marketing budget ability of Casa Pereirinha.
- iii. Seasonality in Alentejo region has a serious impact on the marketing strategy which was not covered in the study due to the lack of information on the Guest house's occupation and activity in the period from December to March.
- iv. Vidigueira does not have a wide range of the competitors with a higher quality of the service, what I, as a marketing specialist find very disconcerting as it reduces the level of competition which is not good for the growing market.

This research requires future continuation and expanding together with the new data and the changing environment. Marketing strategy is more of a tool, rather than a study, and it needs regular adaptation to the rapid modifications and the hypotheses testing.

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## APPENDIX

### Appendix A – Questionnaire for Casa Pereirinha's owners

#### PRODUCT:

1. What is the main product (product, service, service) that you want to sell? Where can you find out about it?
2. Price policy, margins (the percentage that goes into marketing and are willing to give back).
3. If asked what you do, how would you phrase it in one phrase?
4. Your Unique Offer.
5. Tell us how the product is structured? What parts does it consist of? How does the service work? Describe your service step by step or in logical elements.
6. Do you have other products - more expensive or cheaper - or plans for them?
7. What is the brand story? Is it readily available (if so, please add a link)?
8. What are the strengths and weaknesses of your business in your opinion?
9. Are there any feedbacks from your customers? Where can you find them?
10. Do you use unique materials? Do you have unique technologies and techniques?
11. Do you have secrets, know-how and nuances that no one else uses? Do you have unique, one-of-a-kind specialists working with you?

#### COMPETITIVE ENVIRONMENT:

1. What niche do you work in?
2. Please describe the market: How saturated and competitive is it?
3. What is your current market position?
4. Who is your competitor? Please add a list with links to websites.
5. What are the strengths and weaknesses of each of your competitors?
6. What makes your service unique and different?

#### MARKETING:

1. Who is the target audience? What are their needs, problems, fears, objections?
2. What do customers like about your product? Why do they buy?
3. What are the strengths and weaknesses of your marketing? Write in detail what is working well and what is not working well for you?
4. What tools are used to communicate with potential customers? Links to the website, social networks.
5. Is there ready content: articles, videos, blog, publishers?
6. What kind of content are you ready to develop?
7. Do you have a base of customers? If so, where, from where, how many, what and when were they subscribed, when was the last time they communicated

8. What promotion and targeting tools are you already using?
9. What platform do you use to collect traffic (website, website, publisher, webinar) and how do you convert it to orders?
10. What is the process for processing leads and orders?
11. What key metrics do you collect and analyse in the business, how? Please share the results of your analytics.

## Appendix B – Marketing Mix: product



Figure 12. Room 1



Figure 11. Dining Zone



Figure 14. Pool Zone



Figure 13. Venue organization

## Appendix C – Rooms



Figure 15. Room "20 Anos"



Figure 16. Room "Infante D. Henrique"

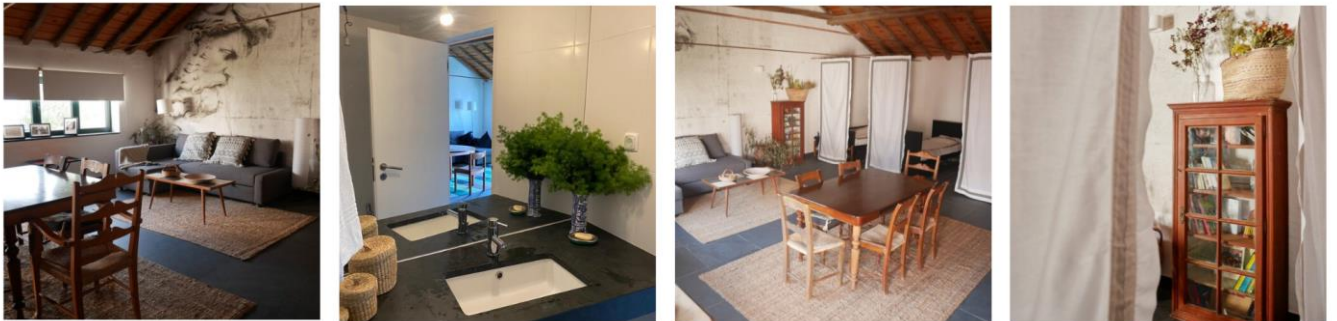


Figure 17. Room "Romano"



Figure 18. Room "Vasco da Gama"

## Appendix D – Road map for the content creation

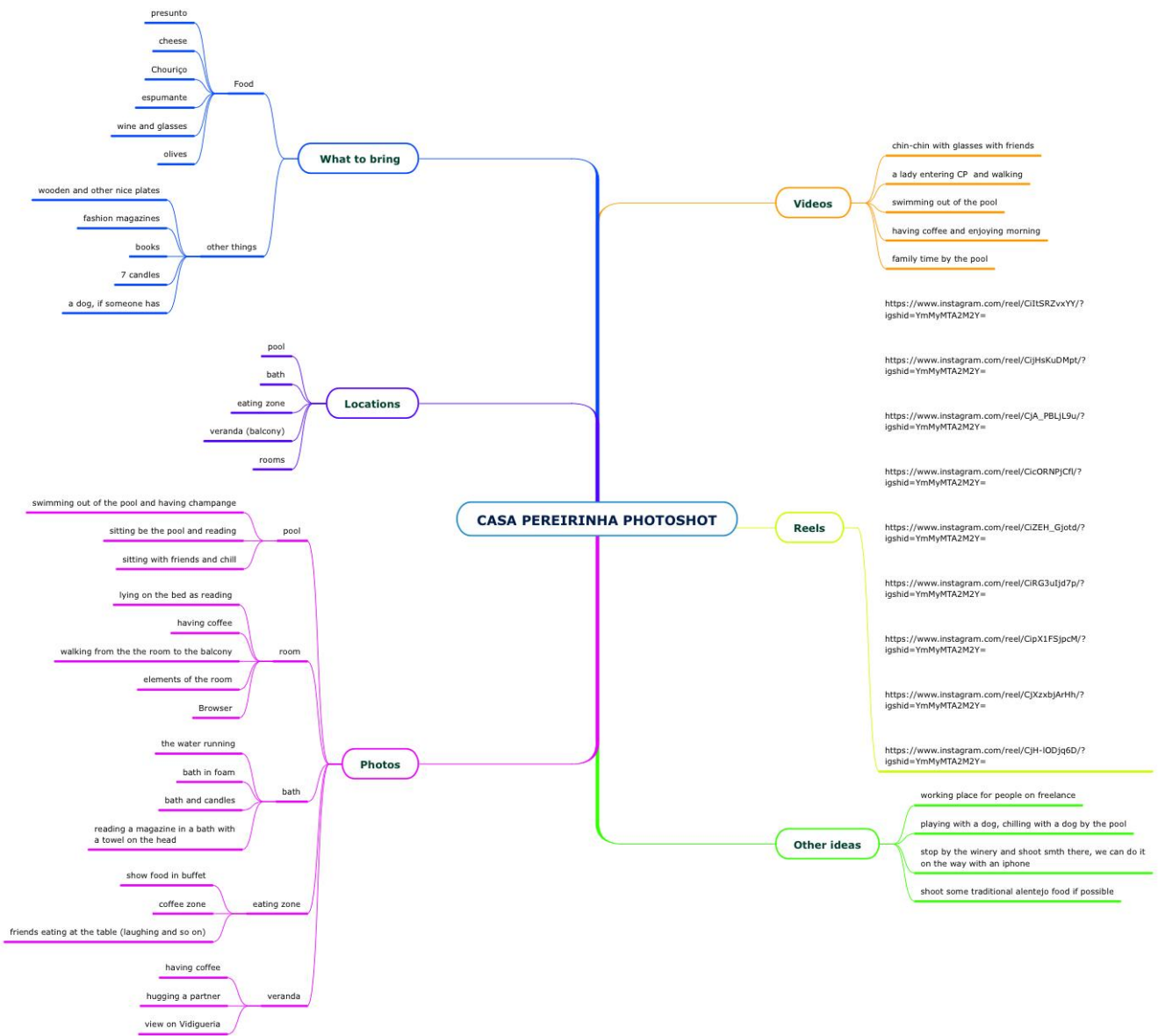


Figure 19. Road map for the content creation