

## PEOPLE AND PLANET FIRST: TESTING AN APPROACH TO PLACE BRANDING IN THE DÃO WINE REGION

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### Abstract

This article suggests a new approach to place branding and place marketing, applied to a case study – the Dão Wine region – and focused on People and Planet, rather than on consumer or customer-centric approaches, which have been used extensively in marketing. Methodology includes literature review, data collection, interviews, empathy maps and field observation in the region. Main findings show the relevance of an expanded perspective of People and Planet marketing mix applied to place brands and place marketing versus the traditional approach used in commercial brands.

### Keywords

Place brand, Dão wine region, People and Planet First, customer/consumer-centric, Public Diplomacy.

### Resumo

Este artigo sugere uma nova abordagem ao place branding e ao place marketing, aplicada a um caso de estudo - a região do Vinho do Dão - e centrada nas Pessoas e no Planeta, em vez de abordagens centradas no consumidor ou no cliente, que têm sido amplamente utilizadas



no marketing. A metodologia inclui revisão da literatura, recolha de dados, entrevistas, mapas de empatia e observação de campo na região. Os principais resultados mostram a relevância de uma perspetiva alargada do marketing mix, People and Planet, aplicada a marcas e marketing de lugares, em comparação com a abordagem tradicional utilizada em marcas comerciais.

#### **Palavras-chave**

Marca local, região vitivinícola do Dão, People and Planet First, centrada no cliente/consumidor, Diplomacia Pública.

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## **PEOPLE AND PLANET FIRST: TESTING AN APPROACH TO PLACE BRANDING IN THE DÃO WINE REGION**

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### **1. Introduction**

This article suggests a new approach to place branding and place marketing studies and the application of those developments in constructing a place brand in the Portuguese wine region known as the Dão. Firstly, in the introduction, this approach is contextualized in the scope of place brand as a scientific discipline. Secondly, it refers to the evolution of the marketing mix concept and presents the model of People and Planet. Thirdly, study contributions are discussed, resulting from applying this framework to the Dão wine region, including a brief contextualization of the region's history, current positioning and main challenges in the future. Finally, the most relevant conclusions are summarized, as well as the study limitations and further research opportunities.

The study benefits from the empirical experience of its authors, since one has been Head of Marketing in Sogrape, the largest Portuguese wine company (Dinheiro Vivo, 2024), for the last six years, and the other designed the Portugal Nation Brand Strategy with AICEP-The Portuguese Agency for Trade & Investment. The authors have experienced the relevance of place brand as a key component of Portuguese wine identity, in a business-to-business client (B2B) and business-to-consumer (B2C), both domestically and internationally.

Additionally, the author from Sogrape observed, not only from his own experience in the Company but also from forums where he represented Sogrape, like debates organized by cross-sector associations including ViniPortugal (representing all wines from Portugal with appellations), Vinho Verde wine region marketing committee, Dão wine region marketing committee, among other forums, where the national and regional wine place brands were discussed to enhance the exports of all Portuguese wines with appellation.

These observations have strengthened the perception that there is a need to articulate the place brand strategy with commercial brands, to ensure that place branding and place marketing add value to their respective places and products.



## 2. Theoretical and conceptual approach: the opportunity within place brand and place marketing

Countries, regions and cities are increasing their investment to create or improve their place images to achieve economic gains through an increase in exports, investment and tourism (Dinnie, 2022). However, only a few places have managed their place brand strategically and consistently in the long term (J. Freire, 2021). For example, Portugal has significantly improved its reputation over the past decade, especially for tourism purposes (Bloom Consulting, 2011, 2024), despite not having, as its neighbor Spain does, a clear place brand public policy and a clear value proposition for the “Portugal” nation brand (Quintela, 2020, 2023).

The “father” of the nation brand, Simon Anholt, who developed the Competitive Identity concept and its Hexagon (Anholt, 2007), and who created, in 2005, the international comparison index for country reputation, currently known as Anholt-IPSOS, claims that countries have multiple components contributing to reputation and that nation branding does not work by itself nor as a mere result of place branding campaigns. Numerous and heterogenous factors, such as public policy, governmental decisions or even the actions of famous public figures and the success of national gastronomy around the world can impact a country’s reputation (BBC News, 2018).

His work organizes the nation brand into five key factors: the natural beauty of the rural and urban landscape, the hospitality of the people, the degree of technological development, the “hard power” (strength of the economy and military power) and, most importantly, the contribution of the nation for the world (Anholt, 2021). In summary, “places are judged by what they do, not by what they say about themselves” (Anholt & Co., 2024). Public diplomacy assumes a special role in this context.

Anholt introduced the public diplomacy concept in 2007, defining it as the set of actions that political decision-makers develop to captivate public opinion both domestically and abroad. This differs from conventional diplomacy, which is more oriented towards inter-nation relationships. Since then, two phenomena have arisen:

- 1) Sub-topics have been derived from the terminology, including *economic diplomacy*, more focused on companies and investors; *scientific diplomacy*, focused on research networks and higher education internationalization and *cultural diplomacy* which, similarly to large sporting events, materializes large expo events that stir people’s emotions and contribute to higher empathy among different cultures, boosting tourism, exports and investment like in Spain after Seville 1992 Expo or in South Korea after the 1998 Olympic Games in Seoul (Quintela, 2020).
- 2) Globalization, allied with the emergence of social and digital media, has transferred more and more visibility from national political protagonists to regional and even local decision-makers, and to sector and corporate associations, whose influence extends beyond territorial borders. This phenomenon has generated a diffusion of interest and power centers, transforming the public diplomacy arena. The sector and civil associations, for example, do not suffer from the public image



erosion that politicians typically do, and generally, have more advocates and followers spread around the world, facilitating the public diplomacy work (Quintela, 2020).

As a result, despite Anholt (2007) considering that place marketing is not the most important vector of place branding, it is accepted that, together with public diplomacy, it supports place brand development. Currently, it is unanimously accepted by scientists and practitioners that the development of a place brand – a concept that includes country, region and city brands – involves a marketing approach different from a commercial brand, following a more holistic marketing mix (Quintela, 2023 in Barreto, Freire e Brito).

Although nation branding has expanded its case study base (Dinnie, 2022) as academia and practitioners have been more in contact (Kaefer, 2021), there are still many questions for theoretical and practical research, including:

- 1) how can place branding contribute to achieving sustainable development goals (SDGs)?
- 2) how can place branding professionals utilise commercial brands as relevant stakeholders for common value creation?

Both these questions could benefit from new conceptual thinking as well as applied case studies, not only at a national level but also at a regional and city level. As mentioned by Mariutti (2019), there is space for theoretical and methodological alignment relating to place brands.

### **3. Methodology: People and Planet First, a new holistic model**

The framework proposed for the alignment of place branding and place marketing is a model of 'People and Planet First' expanding the marketing mix initial proposal. Marketing mix was developed in the 1960s with 4Ps – Place, Promotion, Price and Product (McCarthy & Perreault, 1960). To this initial set, services' marketing added three other Ps – People, Process and Physical Evidence (Booms & Bitner, 1981), a perspective that was later defined as New Marketing Logic, highlighting the change over the past 50 years from a "transaction focus" to a "relational focus", the common denominator of "customer-centric" (Vargo & Lusch, 2004). Given these two approaches are company-focused, another lens was later explored by academics and practitioners, namely the "consumer-centric" lens, where Price was analyzed as Consumer Cost to satisfy, Place as Convenience to Buy, and Promotion as Communication (Lauterborn, 1990), which evolved to address all marketing as an experience in an omnichannel and digital world governed by 4Es rather than 4Ps: Product as Experience, Place as Everywhere, Price as Exchange and Promotion as Evangelism (Fetherstonhaugh, 2009).

The original McCarthy & Perreault model (1960) remains relevant today, having been used in the Principles of Marketing, by Kotler and Armstrong's 19<sup>th</sup> Edition (2023). All





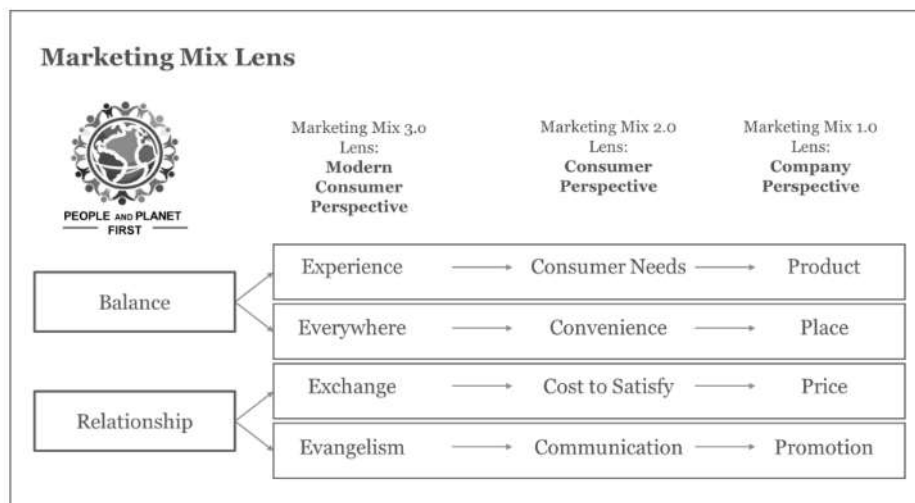
products, even those that are free, have in price a key element of their value proposition and must have a physical or online point of sale. The 4Cs and 4Es lens has added useful perspectives, which are deployed by some of the most successful commercial brands around the world (Danziger, 2017).

There is however a window of opportunity for an additional lens for the development of place brands which is partially covered in the marketing definition of the American Marketing Association, namely "Marketing is 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, 2024). To be effective, in the light of Anholt's insights about the determinants of the reputation of a place brand, place marketing should focus on the value for "society at large" first, namely in People and Planet.

Place brands are far more complex than commercial brands. They are collective constructs that have potentially millions of "owners". While commercial brands are, ultimately, owned by a single entity that owns trademarks, protects the brand and promotes the brand to achieve its objectives, place brands are a sum of multiple entities that live, breathe, promote and impact the brand, including the local population, companies, political decision-makers and all the stakeholders that build public opinion regarding it (Quintela, 2020).

The rise of social media, user-generated content and the rise of regional and city brands challenged the conventional top-down nation branding (Dinnie & Sevin, 2020). Freire had already identified "Local People" as a critical dimension for place brands as a factor of decision for consumers (J. R. Freire, 2009), similar to the People P mentioned in the service marketing. Here the People component proposed is not proposed in the service provider perspective but as the locals being the *de facto* brand owners. As pointed out in Mariutti's revision of studies on country-of-origin, nation branding, country branding and country reputation, "social science research recognizes many conceptual interconnections between the various sub-themes" (Mariutti, 2017) and a significant effect is mentioned as part of a Pakistani study: "if a country is negatively stereotyped on the global stage, it weakens the ability of people to live their nation's brand" (Yousaf & Li, 2015). This highlights the two-sided relationship between a place brand and its People.

Given the openness provided by the authors Booms & Bitner (1981) who claimed that the Marketing Mix is dynamic, and bearing in consideration that other approaches have been conceptualized, especially in the field of sustainable tourism (Pomeroy et al., 2011), a new Marketing Mix lens is proposed called "People and Planet first":

**Figure 1 - Marketing Mix Lenses**

Source: Authors

In the model proposed, there are two critical tasks, inseparable sides of the same coin. The first task is to ensure that the interaction between the place and its People is a long-lasting positive Relationship<sup>1</sup>, and the second task is to establish a sustainable Balance between the product or service with the Planet.

Relationships require mutual understanding. Hence, the chain starts with listening to what the place brand currently means to stakeholders and what they want or dream it could become. This forces traditional “commercial brands’ marketers” to step back from their usual *modus operandi*, towards a more holistic and realistic vision. More than a “top-down” imposed vision, as can be the case with commercial brands, the future of place brands depends on the sum of the contributions of agents in that territory.

The first step is to identify the stakeholders. For that, this study suggests the “Power/Interest Matrix”, a best practice promoted by the European Commission (FI4INN, 2024). This provides a roadmap to help understand people’s different perspectives, from residents to consumers, from weekend tourists to owners of companies and potential investors.

The second step is to define the best format to capture each stakeholder’s insights most effectively considering both formal and informal settings. Depth, not necessarily volume, is critical here. To capture the distinctive aspects of the Dão wine region, this study includes significant data collection on wine tourism and wine export statistics, 10 script-based interviews with key stakeholders, three co-created empathy maps as well as consumer online surveys undertaken by 72 Portuguese and 80 American consumers.

The stakeholders selected for interviews represent the producers (four interviews) and the entities responsible for the Dão wine region brand and for promoting Dão and

<sup>1</sup> To highlight the concepts, People, Relationship and Planet and Balance will be used with initial letter in caps, from this chapter onwards.



Portuguese wines (six interviews). These script-based interviews last at least one hour and are focused on past and current perceptions of the region as well as perspectives for future development. In addition to the formal interviews, informal gatherings (e.g. those after DWRB marketing committee meetings) are also insightful.

For the empathy maps, three individuals are selected to offer differing perspectives of a resident, a national tourist and an international tourist. The co-creation sessions have no set duration - actual sessions ranged from 1 to 4 hours - and have an open conversation mode resulting in deeper insights. Empathy maps identify core issues relevant to the place brand and encompass not only what interviewees say, but also what they see, feel and hear (Dam & Siang, 2020). This is critical to gaining a true understanding of the Relationship the place brand establishes with stakeholders.

An online self-reported survey to 72 consumers in Portugal and 80 consumers in the United States, key markets for the Dão wine region, is used to assess their current perception of the region, its products and associated key brands, and to learn about their previous visits to the region or plans to visit in the future. A statistical summary of the results is included to interpret the current perception of consumers, but also as insightful sources to challenge interviewers.

The third step is to run a qualitative assessment of the information gathered using the holistic model, starting with the holistic Relationship perspective and then exploring the other three lenses, split into the two axes by asking key questions:

- Relationship-Exchange-Cost to Satisfy-Price axis: Is the place brand able to have sustainable repetition from the visitors, investors and consumers of its products and are its residents happy with the resulting current inflow? Is the exchange (of visiting or consuming the place's products) fair to the consumer or over/under delivering and is it profitable for operators in the long term? Is the cost to satisfy and the price competitive vs other alternatives?
- Relationship-Evangelism-Communication-Promotion axis: Does the audience relate to the People of the region (including local producers, its workers, gastronomy sector) and are they proud of the region's positioning? Are there ambassadors, loyal fans promoting the place brand? Is the place brand communication connecting with the audience? Are the place brand's promotion efforts reaching an audience open to potential repetition rather than just novelty-seeking?

The other side of the chain, Balance, first requires identifying a framework that can be used holistically to assess the place's Balance. The framework needs to be adapted to the place in question and allow for a comprehensive analysis of not just the environmental issues, but also on additional elements including geography, architecture, urban and/or rural landscapes as well as traditions, key artefacts and celebrations.

Secondly, it is important to understand the life cycle impacts of the place's key products and services. Consumers are more aware of sustainability and mention how it plays a more relevant role in their purchases, especially after the Covid-19 pandemic (McKinsey





& Company, 2021). Striking a Balance with the Planet means minimizing the impact of the place's activities on the territory for citizens' future generations.

Thirdly, getting to know and visualize the physical territory which includes the geography, natural habitat, housing, architecture, natural resources, climate, colors, sayings, music, dances, flags, food and so many other characteristics that make each Place unique. It is therefore critical to feel the physical territory with authenticity being a central element to successful place marketing with all five senses – what it looks, smells, sounds and tastes like and what it feels texturally. What is truly unique, distinctive and realistic about a place brand, including its People and Planet, is key to developing a credible, sustainable and "sellable" place brand (Quintela, 2020). The approach recommends visiting in person, ideally with no agenda, and adopting the perspective of a resident or tourist. For the Dão wine region, site visits were selected based on desk research resulting in 37 sites representative of the region for both residents and national and international tourists to visit, of which 13 were selected for actual visits representing landmark hotels, key cultural locations and gastronomic references, as well as natural sites and wine producers, mostly in the cities of Viseu, Mangualde and Nelas.

The final step is to run a qualitative assessment that considers all of the aforementioned inputs above and seeks to answer the following questions:

- Balance-Experience-Consumer Needs-Product axis: Are the place's products and/or services designed for circularity, neutrality or even positive impact on the place's environment? Is the entire experience, digital and physical, of acquiring and enjoying the place's products or services engaging or is it a single-way flow? Are the consumers regularly consulted about satisfaction and new needs? Are the residents proud of the product's perception as representative of the place?
- Balance-Everywhere-Convenience-Place axis: Is the way the place brand's products and services are sold minimizing the impact on the environment? In providing convenient sales "everywhere", is the brand taking into account the life cycle impact? Is the place gaining in biodiversity and preserving its cultural heritage? Are the products and services being sold at points of sale that reach the right consumers? Are technologies being used to facilitate consumer access?

In summary, the People and Planet lens applies to a place brand as a first step to truly understanding the brand's current positioning and perception as well as providing valuable insights into avenues for branding and marketing efforts going forward.



Figure 2 - Summary of People and Planet First Approach

Marketing Mix - People and Planet First approach			
Axis / Lens	People and Planet First	Modern consumer	Company-centric
Axis 1	Relationship	Exchange	Price
Axis 2	Relationship	Evangelism	Promotion
Axis 3	Balance	Experience	Product
Axis 4	Balance	Everywhere	Place

Axis 3 and Axis 4 steps (Balance)			
Step	Key task	Focus	
<b>First</b>	Identify the stakeholders using Power/Interest Matrix, including people in different perspectives (resident, employee, national and international tourist) as well as organizations and companies involved	Identify all stakeholders (large or small)	Highlight all relevant questions/areas
<b>Second</b>	Define formats to capture insights: interview key stakeholders, especially those identified as High Power and Interest and Core. Develop empathy maps for the key "consumers": residents, national and international tourists. Capture broad view from a larger audience via a survey.	Depth of insights to be contrasted with statistics and survey data	Identify key environmental topics to address
<b>Third</b>	Combine all sources of information using all four lenses combined with a set of holistic questions aimed at defining where the marketing mix is today and avenues for future development	Holistic perspective	Feel the territory, map all five senses
<b>Fourth</b>			Holistic perspective

Axis 3 and Axis 4 Holistic Questions (Balance)			
Axis 3	Is the way the place brand's products and services are sold taking into account the impact on the environment?		
Axis 3	In providing sales convenient and "everywhere" taking into account the lifecycle impact?		
Axis 3	Is the place gaining in biodiversity and preserving its cultural heritage?		
Axis 3	Are the products and services being sold at points of sale that reach the right consumers? Are technologies being used to facilitate consumer access?		
Axis 3	Is the place's product and/or service designed for circularity, neutrality or even positive impact on the place's environment?		
Axis 4	Is the entire experience, digital and physical, of acquiring and enjoying the place's products/services engaging or is it a single-way flow?		
Axis 4	Are the consumers regularly consulted about satisfaction and new needs?		
Axis 4	Are the residents proud of the product's perception as representative of the place?		

Axis 1 and Axis 2 Holistic Questions (Relationship)			
Axis 1	Is the place brand able to have sustainable repetition from its visitors, investors, consumer of its products and are its people happy with the resulting current inflow?		
Axis 1	Is the exchange (of visiting or consuming the place's products) fair to the consumer or over/under delivering and is it profitable for operators in the long-term?		
Axis 1	Is the cost to satisfy and the price competitive vs other alternatives?		
Axis 2	Does the audience relate to the people of the region (including local producers, its workers, gastronomic) and are they proud of the region's positioning?		
Axis 2	Are there ambassadors, loyal fans promoting the place brand? Is the place brand communication connecting with the audience?		
Axis 2	Are the place brand's promotion efforts reaching an audience open to potential repetition rather than just novelty-seeking?		

Source: Authors



#### 4. Discussion and Study Contributions

The Dão Wine Region was defined in 1908, and legislated in 1910, becoming the first non-liquor wine region demarcated in Portugal (CVR Dão, 2024). The region includes over 2,000 producers, circa 13 thousand planted vineyard hectares (about half of the Alentejo wine region) (IVV, 2024), with a production of over 17 million liters. Portugal is the most relevant market (63% of consumption in 2022), but it has important volumes to Canada, USA, Brazil and Switzerland, which represent over 90% of total exports (CVR Dão, 2024).

The region was designated by the “Estado Novo” (Portugal’s political regime from 1933 to 1974) as “Portugal’s winery”, as part of industrial planning policy (Vieira, 2024), which led to a focus on productivity and a general loss of quality (Mayson, 2024). The system, focused on cooperatives, ended only with Portugal’s integration into the European Union. Private operators became able to invest in the region and change winemaking practices. Sogrape was present in the region before 1986 but was now allowed to buy grapes directly from producers and to establish its own vinification by acquiring Quinta dos Carvalhais vineyards in 1988 and building a modern winery in 1990.

Thanks to the vinification studies made by Engineer Alberto Cardoso Vilhena in the Centro de Estudos Vitivinícolas do Dão, winemakers in the 1990s could taste and select from several single varietal micro-vinifications, the most important grape varieties for the future development of the region, with the aim to restoring high standards. This it has done (Mayson, 2024), although most experts recognize it is still far from fully realizing its full potential (Vieira, 2023).

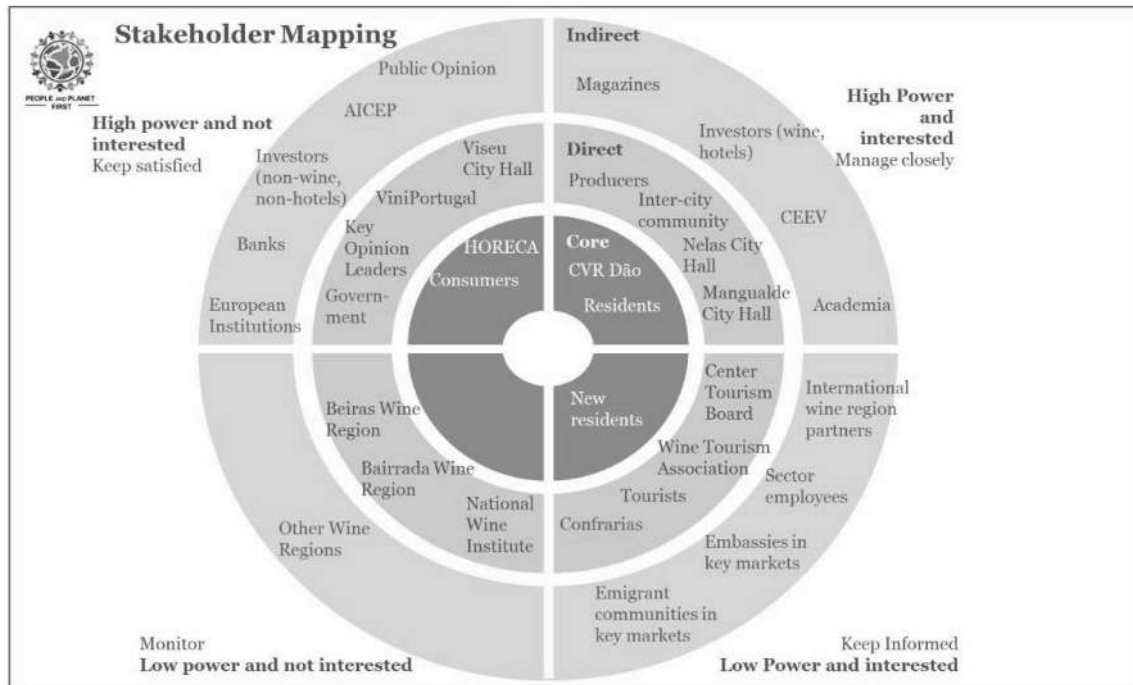
The current study applies the People and Planet First holistic model to the Dão wine region, a region that is shifting its focus towards quality and aligning itself more with the superior recognition niche (small selected market segment) positioning. Figure 2 illustrates the first step in the People and Planet first approach: the stakeholders mapping of the place brand – the Dão wine region – as a starting point for the Relationship axis of the Marketing Mix.

The interviews result in insights regarding the marketing mix of the region, including the perspective not only of DWRB, but of producers too. In most cases, the history of volume and low quality is mentioned which reflects it is an important perception to overcome, not just in the eyes of the consumer, but also to the producers and the residents themselves. A visible step-change seems required, perhaps in the form of a rebranding, relocation of headquarters or beginning of a new event that demonstrates the rejuvenated, higher quality Dão wine region. Several opportunities are mentioned, including the limited, but relevant growth of high-quality restaurants and new hotel venues located not just in the urban areas but also, increasingly, linked to the vineyards.

Empathy maps result in very different insights. A young resident in Viseu understands the importance of wine to the region but does not see it as relevant to the daily city life. As a mere example, Viseu holds, during August, one of Portugal’s oldest fairs – now in its 633<sup>rd</sup> edition (Público, 2024) – with hundreds of thousands of visitors. Despite histo-



**Figure 3 – Stakeholder Mapping of the Dão wine region place brand**



Source: Authors

rical connections to wine and a large audience, the fair did not have a relevant presence of Dão wines in recent years, thereby losing touch with its local population. The Viseu District, where the Dão wine region is mostly based, includes an urban context, a city with over 100,000 inhabitants, and a rural landscape whereas most municipalities have 10,000 residents or fewer. Like most urban areas in Portugal, Viseu faces a housing shortage and the lack of affordability common to major cities, but also faces a challenge of regional cohesion with a lack of public transportation for those looking to explore the region, locals included. A young person looking to go from Viseu to Serra da Estrela – mainland Portugal's highest mountain and a relevant tourist attraction – a little over 70km away, may take two entire days to reach their destination via public transport, which deters young residents from visiting rural areas in the region.

A national tourist empathy map co-creation shows that even those with family ties to the region mention a lack of reasons to visit including restaurants, cultural attractions or even reference stores, despite the relatively short distance to Porto (circa 1 hour away) and Lisbon (circa 2 hours). These detailed insights - uncovered through the empathy maps - are likely the key reasons behind more than half of the Portuguese consumers in the survey not having visited the region in the past. On the other hand, from an international tourist's perspective, there is interest in the region's unique wine component. However, a lack of other key attractions tempers their interest, particularly for those traveling with a non-wine connoisseur. As an example, Buçaco, a palace and garden in the Bairrada region (next to the Dão), was mentioned as an interesting place



to start a journey into a more natural experience in the “Beiras” (a popular reference which includes Bairrada, Dão and Beira Interior wine regions).

The consumer survey provides an analytical perspective regarding the issues of the region’s visibility and quality perception. Portuguese consumers attribute a Net Promoter Score<sup>2</sup> (NPS) of 11 and American consumers an NPS of -13. These figures are considerably below benchmark figures of both consumer goods and luxury goods, 42 and 86 respectively (Customer Gauge, 2022). This means that the perception of the ongoing quality transformation has not been acquired by the consumer yet. While there are still entry-level low-quality wines produced by the region, it is recommended they are not labeled as “DOC Dão”, but instead carry a regional wine appellation (such as “Regional Beiras”) to clearly differentiate the region’s quality. Besides clearly addressing the lower quality wines, the region could clarify its higher quality wines. As an example, the region created in 2014 the classification “Dão Nobre” a unique classification for superior wines. However, since its inception, only five wines in three different vintages (2015, 2018, 2019), all from the same producer have been awarded this classification (Pinto da Silva & Esteves da Silva, 2022). As it stands, this classification prevents the region from being regarded as high-quality.

Concluding the Relationship component with the holistic questions, there are additional possibilities for the place brand to explore. On the Relationship-Exchange-Cost to Satisfy-Price axis, there are many opportunities including, but not limited to:

- Holistic Question (HQ): Is there sustainable repetition from visitors, investors and consumers? Short Answer (SA): The region currently does not track this nor do any other entities (Turismo do Centro) but the data shows that few national or international tourists consider the Dão, let alone repeatedly.
- HQ: Are the People of the place happy with the resulting current inflow? Is the exchange (of visiting or consuming the place’s products) fair to the consumer or over/under delivering and is it profitable for operators in the long term? Is the cost to satisfy and the price competitive vs other alternatives? SA: Currently, as perceived in the consumer survey, the value proposition is not yet over-delivering, and the region needs to establish higher quality standards and separate the Dão DOC from entry-level wines. Given that there is an abandonment of vineyards, it seems older, less professional producers are not sustainable. On the other hand, the region is seeing an inflow of producers from other regions, including high-end investments which suggest potential profitability for higher-end positioning. With a vineyard area of about half of Alentejo and a third of the Douro, the Dão is still transitioning from the previous “Portugal’s winery” positioning towards its natural “boutique” (i.e. smaller in volumes, but at higher perceived value) positioning.

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<sup>2</sup> To assess Net Promoter Score (NPS), consumers are asked about the likelihood to recommend a product, service, or organization on a scale of 0-10. The NPS score is calculated by subtracting to the % of “promoters” (those scoring 9-10) the percentage of “detractors” (those scoring 0-6)





On the Relationship-Evangelism-Communication-Promotion axis, there are also opportunities including, but not limited to:

- HQ: Does the audience relate to the People of the region (including local producers, its workers, gastronomy sector) and are they proud of the region's positioning? SA: While there was no evident negative sentiment from the interviews, the legacy of low quality did weigh on most answers. A more connected brand image and resident-focused campaign could help create a stronger sentiment of belonging. As an example, using artificial intelligence - for visualization purposes - and making use of all interview data and region inputs, it was possible to develop an alternative logo that better reflects the region's unique qualities and portrays the Dão resident's calm, joyful and friendly characteristics. Co-creating the logo with local producers, residents and tourist operators could result in a stronger buy-in from all of the region's economic operators.

**Figure 4** – Current Dão logo (Source: CVR Dão) and artificial-intelligence proposed logo for the Dão wine region



Source: made with ChatGPT and Dall-E

- HQ: Are there ambassadors, loyal fans promoting the place brand? Is the place brand communication connecting with the audience? SA: While there are several key opinion leaders, prominent distributors or sommeliers fans of the region, a "Friends of the Dão" network could be created to form the basis of public diplomacy work and extend beyond commercial connections via formal and informal ambassadors. For example, the more than likely first Portuguese Master of Wine is a producer in the Dão region (Pacheco, 2023) and could be a terrific brand ambassador.
- HQ: Are the place brand's promotion efforts reaching an audience open to potentially repeating rather than just novelty-seeking? SA: DWRB did not show



evidence of having clear brand guidelines including positioning and target audience. This could be an opportunity to define a more targeted audience more likely to repeat and thus become more loyal and sustainable long-term.

Regarding Balance, framework first. The Dão wine region is mostly a rural region with an abundance of natural landscapes, agriculture and historical traditions. For this, the Agroecology elements published by the Food and Agriculture Organization represent a comprehensive list to cross-check for sustainability, from diversity to culture and food traditions.

**Figure 5 - 10 Agroecology Elements**



Source: FAO/UN, 2019

For the second step, the most relevant life cycle impacts in the wine business are in glass manufacturing and transportation, especially road freight (Pinto da Silva & Esteves da Silva, 2022). Several producers mentioned have reduced bottle weights in recent years. As for sales, as mentioned, most are already in Portugal and most export sales are served by sea freight including Canada, Brazil and the USA, although their last mile will at some point imply truck-based carbon emissions.

The third step includes experiencing all five senses of the Dão wine region. The Dão wine region is unique in Portugal given its one-of-a-kind geography. It resembles a hidden gem, surrounded by several mountains (including Serra da Estrela, Caramulo, Açor, Buçaco and Nave) which, combined with the two rivers that cross the region, Dão and Mondego, and vineyards at least 400 meters above sea level, allow the wines to have an authentic freshness and character, which is critical to the production of high quality wines. The agenda-free nature landscape visits uncovered a little promoted network of



“swings” on top of the region’s highest mountains, a path ideal for those looking for lesser-known paths. Additionally, the common presence of butterflies was noted and identified as a potential icon for the region’s biodiversity.

Wrapping up all insights and applying the holistic questions to the Balance component results in additional contributions, first on the Balance-Experience-Consumer Needs-Product axis, including:

- HQ: Are the place’s products and/or services designed for circularity, neutrality or even positive impacts on the place’s environment? SA: The region could use this lever to differentiate from other regions at a time when even key opinion leaders are demanding for lightweight bottles (Robinson, 2023). Making it mandatory for producers bearing the region’s DOC trademark to use light bottles as well as seeking to reuse locally consumed bottles through a partnership with local waste and recycling companies (e.g. Planalto Beirão).
- HQ: Is the entire experience, digital and physical, of acquiring and enjoying the place’s products or services engaging or is it a single-way flow? SA: The region has the opportunity to develop its wine tourism, connecting the product with long stays, experiences in touch with nature and contributions to biodiversity, as well as the potential to keep in touch with the winery after each visit. Given the recent growing importance of wine tourism (Turismo de Portugal, 2024), the region can attract tourist operators and investors to create new offerings. And the DWRB can lead this transformation. Currently, the DWRB headquarters is neither “representative” of the region, as per some of our interviewers, nor is it engaging for visitors. A more natural, immersive, welcoming experience by the DRWB could set up a precedent for producers to follow, as well as functioning as a beacon for operators and tourists. It could integrate the local community, promote biodiversity - for example with a butterfly habitat - and embed the component of exploration with the gastronomic experiences the region has to offer.
- HQ: Are the consumers regularly consulted about satisfaction and new needs? SA: There was no evidence by the DWRB of recent consultations to consumers regarding their needs. Despite that, the producer’s search for authenticity has made its wines evolve in line with the most recent trends in wine consumer preferences, namely lower alcohol and more elegant wines (Garcias, 2023).
- HQ: Are the residents proud of the product’s perception as representative of the place? SA: The region has been focusing its communication on indigenous grape varieties like Touriga Nacional and Encruzado. Producers and residents feel proud of these booming native varieties and the recognition they are receiving; the Touriga Nacional is accepted in the Bordeaux wine region due to its climate change resilience.

Finally, on the Balance-Everywhere-Convenience-Place axis, there are additional suggestions arising from the holistic questions:



- HQ: Is the way the place brand's products and services are sold minimizing the impact on the environment? SA: DRWB focus markets for promotion could be either in Portugal or in markets where distribution footprint is lower. Besides addressing the classic economic inside-out perspective (i.e. what are the current top markets and growth potential) it is important to acknowledge the key markets for the benchmark regions – for example, Burgundy – and incorporate the outside-in perspective.
- HQ: In providing convenient sales "everywhere", is the brand taking into account the life cycle impact? Is the place gaining in biodiversity and preserving its cultural heritage? Are the products and services being sold at the points of sale that reach the right consumers? Are technologies being used to facilitate consumer access? SA: It is recommended that wine producers connect directly with consumers as it happens with United States wineries, where direct-to-consumer represents c. 8% of all wine sales (Sovos, 2024). Establishing a connection through the wine, or with a visitor after a going to one of the Dão wineries or restaurants can be a key enabler for that visitor to remember, cherish and return.

Towards that goal, it is recommended for the DRWB to develop a revised approach, leveraging all its brand assets, reinvigorating its Marketing Mix and making use of public diplomacy, but also economic and cultural ties.

An even wider view of Relationship, considers that the Dão region is among others in the Center of Portugal that can, collectively have greater critical mass to promote each place brand while also becoming increasingly relevant to visitors, operators and investors in the Bairrada and the Beira Interior regions. This form of internal diplomacy can strengthen external connections, increasing the reach of public, economic and cultural diplomacy.

Besides coordinating with other wine regions, it is important to align all stakeholders currently promoting the Dão wine region, even indirectly. Today, the region is promoted by Turismo do Centro, ViniPortugal, CIM Viseu Dão Lafões and many others including local city halls and economic development associations. Desk research shows that each presents a different view of the Dão. ViniPortugal does not include it among Portugal's top wines, Turismo do Centro presents an antiquated view of the region (like pre-1990) and CIM Viseu Dão Lafões promotes the region without addressing wine tourism. Ensuring all of them are aligned is a critical factor towards success.

#### 4. Final Considerations

Place brand and place marketing being recent, the aim of this research is to contribute theoretical and empirical developments in these domains, and to make proposals that, based on the case study, which can be replicated elsewhere in Portugal and internationally.

Additionally, given the evolution of place branding 2.0 and public diplomacy (Anholt, 2020), the suggested approach supports the idea that a place brand is made credible



through a “good deed” diplomacy, bringing to the world its best, but, at the same time, contributing to the common good, economic progress and environmental sustainability.

The use of the People and Planet First model, overcomes classic Marketing mix constraints in developing a place brand and allows for the incorporation of key stakeholders and ideas for place brand, sector and company development (Quintela, 2021). The model is aligned with 1) what consumers are looking for, i.e. brands that respect People and preserve the Planet and 2) the authenticity and distinctive features of the region.

The application of the People and Planet First approach to the Dão wine region was shared with the DWRB and well received. Some quick-to-implement feedback was given, regarding market selection, for example, with initial discussions also focusing on the DOC Dão, “Beiras” and the Dão Nobre classifications, as well as the potential new headquarters of the DWRB. The entire holistic strategy requires longer term projects and commitment. A follow-up of the definition and implementation of the strategy will be useful to validate the approach beyond its conceptual value.

The complexity of developing a place brand that is connected to commercial brands creates limitations for the study given the lack of similar cases for comparison. This could be a window of opportunity for future efforts relating to international comparability.

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