



Executive Summary For Bilbao | Rioja

Great Wine Capitals Global  
Network® Market Survey

# “The Pillars Of Wine Tourism Performance”



2013



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This summary report highlights the wine tourism performance of Bilbao-Rioja, a member of the GREAT WINE CAPITALS GLOBAL NETWORK® (GWCGN). We collected data from the GWCGN capitals during the summer of 2013.

The number of survey responses for Bilbao-Rioja was only 13, which severely limited the scope of the analysis and conclusions. Nevertheless, we highlight some key findings below.



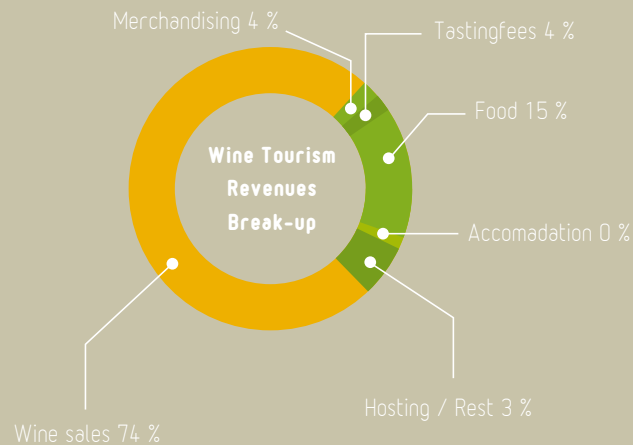
2013



## Wine Tourism Revenues and Top Sources of Profits

### Wine Tourism Revenues Break-up

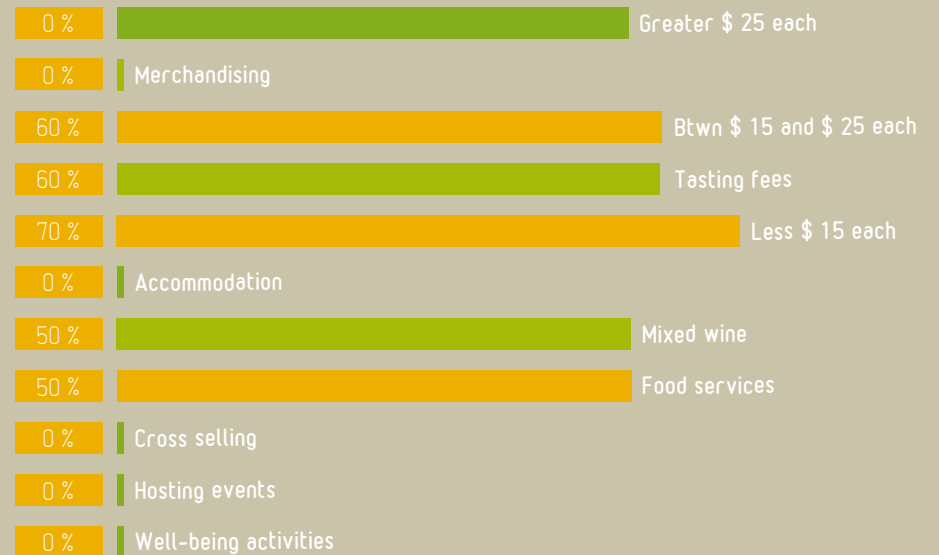
Among all the great wine capitals, Bilbao-Rioja has the third largest percentage of Wine Sales revenues, which is its number one source of revenues. From the standpoint of the Bilbao-Rioja wineries, Food services are the second major source of revenues and Tasting Fees is the third source revenues, on par with Merchandizing.



### Top Sources of Wine Tourism Profit

For the 2013 survey, we find that low-priced wines (price less than \$15/bottle) represent a top source of profits (with 70% of responses) in Bilbao-Rioja. The next top sources of profits are Tasting Fees and middle-priced wines. Food Services and Mixed Wine sets come in third position.

### Top Sources of Profit





## Wine Tourism Investments and Marketing

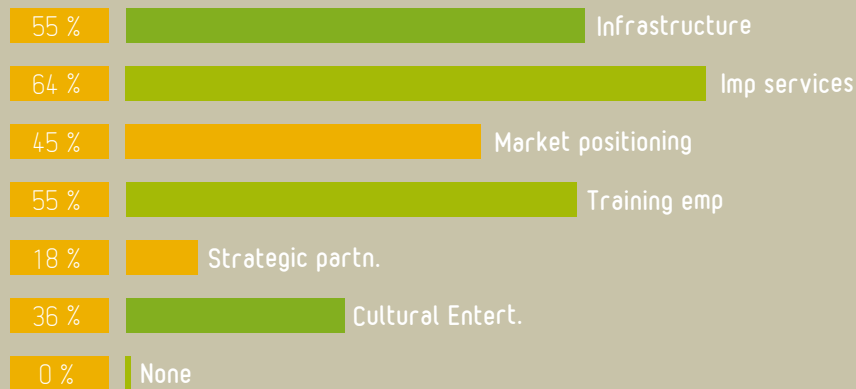
### Investments in Wine Tourism

Improving Services is the top investment category for the 2012-2013 period in Bilbao-Rioja, which is similar to the findings for the Porto region. Training Employees and Infrastructure investments are the next two top categories.

## Top Marketing Tools Used

Just like in the 2012 survey, we again find that the top marketing tool used across the sample of all great wine capitals is a winery's Own Website. For the specific sample of Bilbao-Rioja wineries the next top two categories are Citations by touristic magazines/guides and Social Networks.

### Top Investments



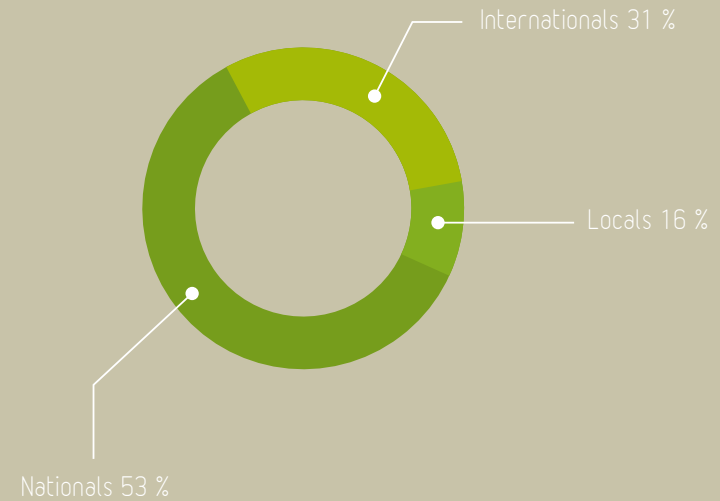


## Tourists Characteristics

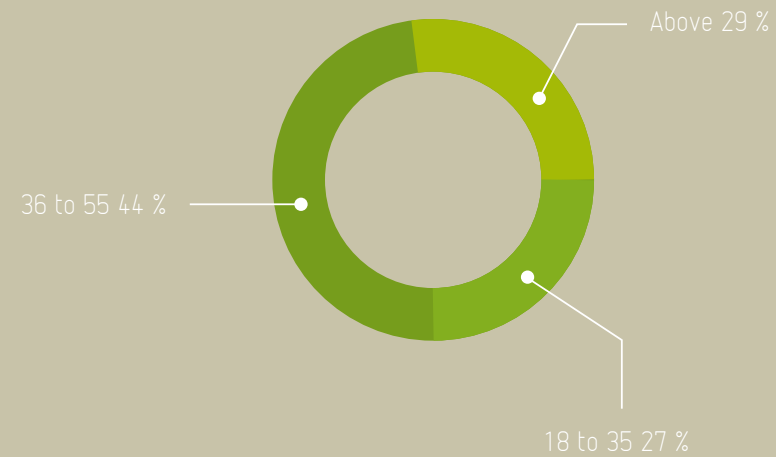
In terms of Numbers of Visitors per winery, Bilbao-Rioja is in third place among all great capitals. In terms of Spending per Visitor, it is in the second to last place.

Bilbao-Rioja is in the middle of the pack in terms of attracting visitors from various origins and age groups. It has the lowest percentage of female visitors (40%) among the great capitals.

## Tourists per Origin



## Tourists per Age Categories





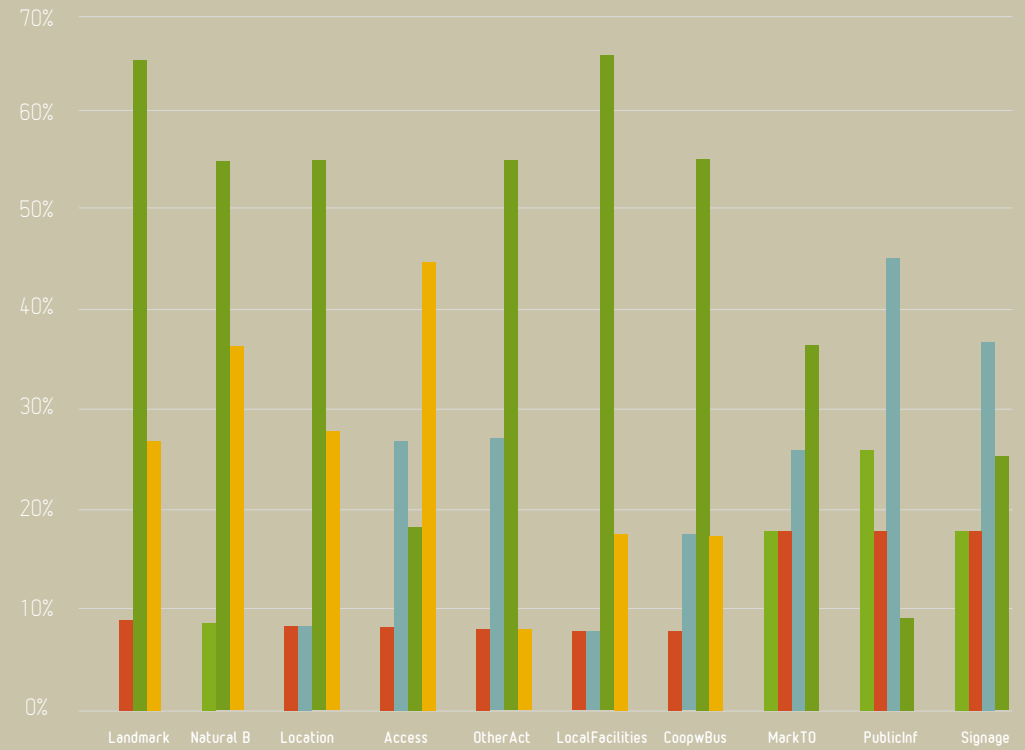
## Positive and Negative Factors for Business

Regarding External Factors perceived by wineries to help business or not, Bilbao-Rioja wineries testify that the Natural Beauty and the Fame of the region are key positive factors, even though opinions are more divided regarding the Natural Beauty category, by contrast with other great capitals. Internet use is largely seen as a positive factor. Consistent with the findings of the 2012 survey,

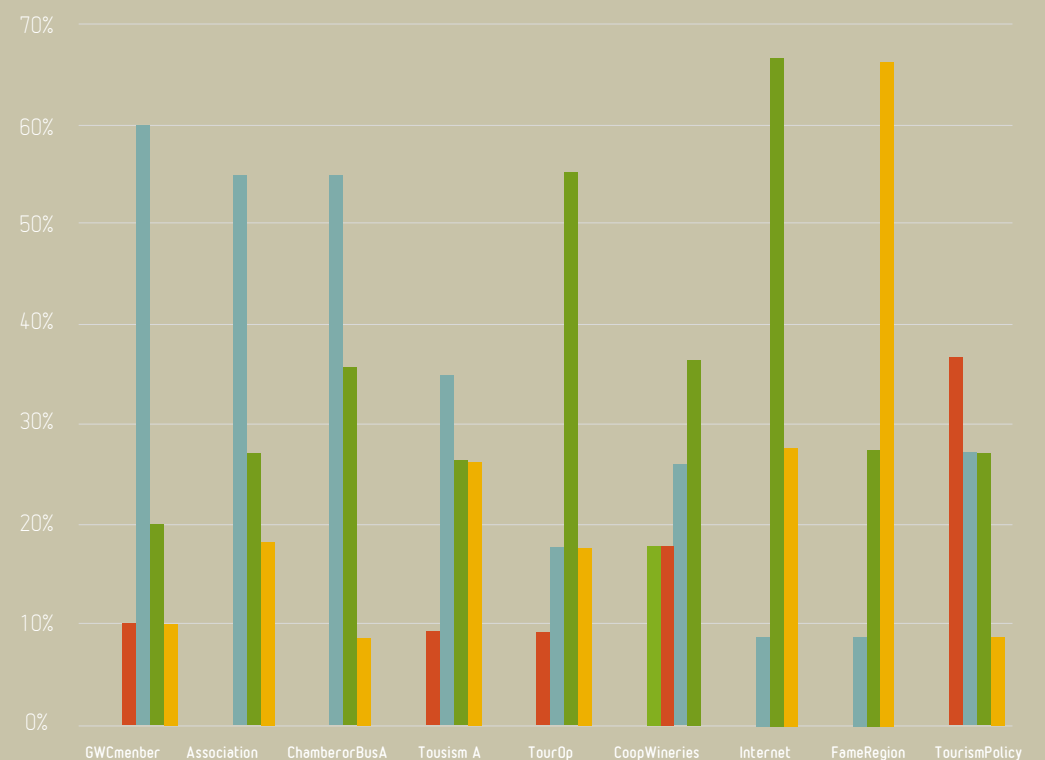
Bilbao-Rioja wineries report that Signage and Public Infrastructures can be factors that impede business. Opinions are clearly divided regarding the impact of Marketing by Tourism Office and Cooperation with other Wineries.



### External Factors - Part 1



### External Factors - Part 2





## Managerial Implications and Conclusion

The 2013 edition of the GWC<sup>®</sup> survey has produced some interesting findings for the wineries of Bilbao-Rioja. Bilbao-Rioja attracts a balanced percentage of generations of visitors and about a third of visitors are foreigners.

Bilbao-Rioja wineries demonstrate a commitment to invest in Improving Services, Training Employees and Infrastructures, which appears to support the activities that bring in more revenues and profits, such as low-end and middle-end priced wine sales and Food Services.

Overall, Bilbao-Rioja wineries use a mix of promotional tools, with a greater emphasis on modern communication tools (Social Networks)

vs. standard ones (Travel Agencies). Similar to Cape Town wineries, Bilbao-Rioja wineries emphasize the notion of Authentic Experience as part of their marketing strategy.

One must exercise caution when trying to extend managerial implications from a small sample of wineries to the whole the region. Nevertheless, it appears that perhaps there is room for Bilbao-Rioja wineries to expand their tourism strategy to attract more women clients. There also seems to be opportunities to create a better cooperation with Tourism Offices and other wineries, as a means to generate steady wine tourism revenues.