



Langhe-Roero and Monferrato, Ten Years as UNESCO World Heritage Site: An Assessment of Identity, Development, and Future Challenges

Research curated by *formules*

Executive Summary

On **June 22, 2024**, the tenth anniversary of the inscription of the **UNESCO site** “*The Vineyard Landscapes of Piedmont: Langhe-Roero and Monferrato*” on the **World Heritage List was celebrated.**

Introduction

Impact study

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On the occasion of the anniversary, *formules* was commissioned to investigate the **long-term impacts of the UNESCO designation**, with the aim of understanding whether and how the inscription influenced:

- the **opinions, perceptions, and decisions** of various local **stakeholders**;
- the trends of **key economic indicators** within the Site's boundaries;
- the **reputation, visibility, and tourism appeal** of the areas involved.

Syllabus of the research

The three impact areas

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The research therefore focuses on **three key areas of impact**:



Social

Analysis of social impacts, inferred from the perspectives of local stakeholders.



Economic

Analysis of the economic and employment impacts on the territory.



Communication

Monetary valuation of the media attention generated around the UNESCO Site.

Geographical Framework

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A total of **101 municipalities** were involved in the UNESCO nomination process:

- 29 municipalities within the **Core Zones** – areas of excellence;
- 72 municipalities within the **Buffer Zones** – protective areas surrounding the designated sites.

The analysis examined all available data at the municipal level and extended the scope to include the 99 municipalities bordering the Buffer Zones, defined by the research team as the **Control Zone**.

Overall, the scope of the analysis
covers **200 municipalities**.

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Social impact

Social impact

Methodology

The research developed a targeted **survey** aimed at assessing whether, how, and to what extent the UNESCO designation has impacted the activities of local stakeholders.

In addition, two territorial **focus groups** were conducted — one in the Core Zones and one in the Buffer Zones.

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Social

Analysis of social impacts, derived from the views and experiences of local stakeholders.

512

A total of 512 **respondents** completed the questionnaire, which consisted of 20 questions. It remained open for 40 days during the spring of 2024 and was disseminated with the support of 12 local partners.

10

Various **categories of stakeholders** were involved in the study, including: mayors and local administrators, tourism operators, wine producers and owners of agricultural enterprises, real estate agencies, hoteliers and agritourism owners, restaurateurs, retailers, journalists and local media, as well as cultural institutions and professionals.

Survey

Respondent profile

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Genre

51%

women, 48% men,
1% another gender
identity or preferred
not to disclose.

Age

50-59

The most
represented **age**
group.

Place of Origin

60%

from the **province of**
Cuneo, 21% from the
province of Asti, 12%
from the province of
Alessandria, and 7%
from other provinces.

Survey Findings

Awareness



96% of respondents report being **aware of the UNESCO Site**, but **only 50% are able to correctly identify its geographical boundaries**. Moreover, 27% are not familiar with the reasons for its Outstanding Universal Value.

Value



78% of respondents believe that the **value** of the UNESCO Site is **more recognized and appreciated by tourists than by local residents**.

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Impacts

Among the most widely acknowledged impacts are the **international promotion of Piedmontese food and wine culture** and the enhancement of both national and international reputation. Conversely, the **UNESCO designation is perceived as less impactful in terms of fostering a sense of identity and civic pride**.

Focus Group

Findings

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The focus groups highlighted the importance of **strengthening local networks** and **fostering synergies** among the stakeholders involved, as well as improving communication and dissemination regarding the UNESCO designation.

Local Administrators

They are often unprepared to manage conflicts between the needs of residents and those of tourists. There is a lack of continuity on UNESCO-related matters between successive administrations. Younger generations are sometimes unaware of the UNESCO nomination.

Young Residents

It is essential to educate young residents on UNESCO-related themes. Targeted training in the fields of food and wine culture and traditional craftsmanship can ensure the intergenerational transmission of knowledge and the preservation of local trades.

Tourism Operators

They often operate without integrating or leveraging local resources through collaborative networks. There is a significant shortage of qualified professionals, such as licensed tour guides. Training plays a crucial role in developing a conscious and coordinated tourism offer.

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Economic Impact

Economic Impact

Methodology

The economic impact analysis was structured in three main phases: **time-series data analysis**, application of a **statistical evaluation model**, and estimation of the **overall economic impact**.

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Economic

Analysis of the economic and employment impacts on the territory.

5

The analysis assessed the evolution of five key sectors: **real estate, land use, tourism, business activity, and employment**.

73%

The designation **significantly influenced 73% of the variables analyzed**.

209mIn

The estimated economic impact amounts to approximately **€209 million overall**.

Economic impact

Real estate market

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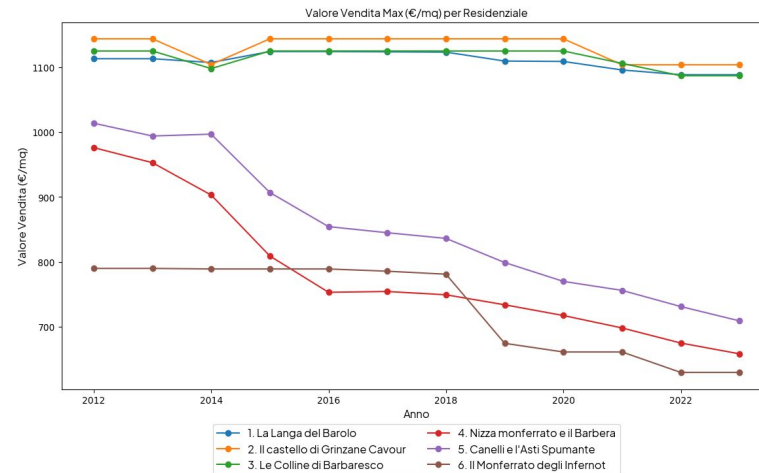


Price per sqm

Between 2014 and 2020, housing sale prices **increased** in the **Langa del Barolo area** (+2.66%), the **Hills of Barbaresco** (+2.47%), and the **Castle of Grinzane Cavour** (+3.58%). In contrast, **Monferrato, Canelli, and Asti Spumante recorded a 27% decline between 2012 and 2023**, reflecting broader regional trends in Piedmont.

Transactions

Transaction volumes, on the other hand, **grew significantly** between 2014 and 2022: **+93% in the core zones and +84% in the buffer zones**. Notably, Monferrato degli Infernot and Nizza Monferrato e Barbera recorded increases of 239% and 106%, respectively, compared to a regional average of +94%.



Source: authors' elaboration from Agenzia delle Entrate

Economic impact

Tourism

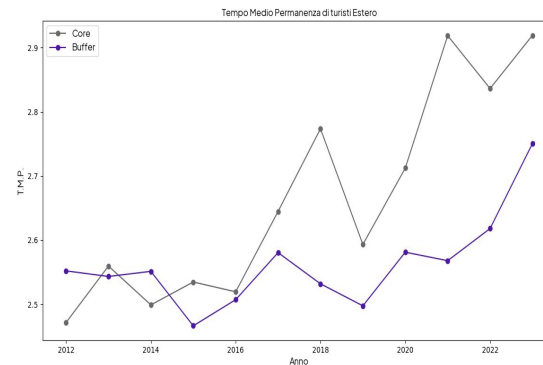
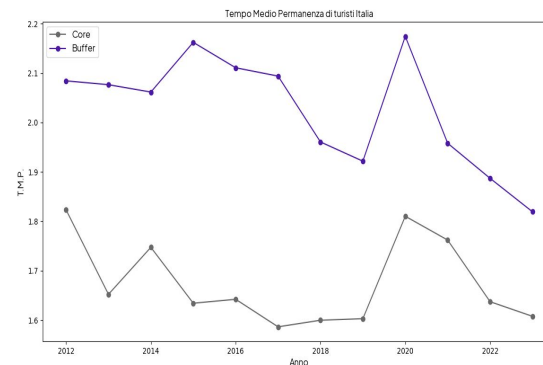
Tourism Flows

Tourism **increased significantly** across all core zones. Nizza Monferrato e Barbera recorded the most marked growth, with a +237% increase in arrivals and a +325% increase in overnight stays between 2012 and 2023. Nevertheless, the **Langa del Barolo remains the most visited area**, owing to its well-established reputation.

Average Length of Stay

Over this period, **international tourists extended their average length of stay**, while **domestic visitors shortened** theirs. Preferences for accommodation areas also diverged: **Italian tourists tend to favor the buffer zones**, whereas **international visitors prefer the core zones**.

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Economic impact

Tourism

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Accommodation Sector

The accommodation sector has undergone significant transformation, with an **increase in non-hotel lodging** (+24% to +93% depending on the area) and a **decline in traditional hospitality structures**, particularly in the Hills of Barbaresco (–23%) and in Nizza Monferrato e Barbera (–52%). Short-term tourist rentals have risen sharply.

	Year	Short-Term Tourist Rentals Rooms	Short-Term Tourist Rentals Beds
La Langa del Barolo	2019	214	425
	2023	690	1,393
	Var.%	222.43%	227.76%
Le Colline di Barbaresco	2019	13	26
	2023	109	214
	Var.%	738.46%	723.08%
Nizza monferrato e il Barbera	2019	41	80
	2023	263	553
	Var.%	541.46%	591.25%
Canelli e l'Asti Spumante	2019	42	80
	2023	197	399
	Var.%	369.05%	398.75%
Il Monferrat degli Infernot	2019	3	6
	2023	146	313
	Var.%	4766.67%	5116.67%

Economic impact

Employment and Enterprises

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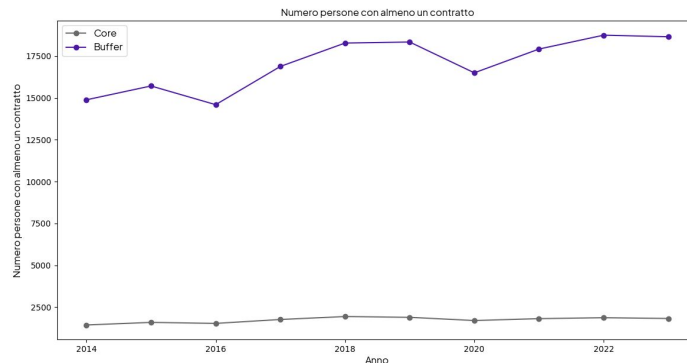


Enterprises

Comparing the total number of enterprises by zone between 2011 and 2021, nearly all areas show an **overall decline**, with the exception of the Langhe (+4%) and the Hills of Barbaresco (+5%). In absolute terms, Nizza Monferrato e Barbera consistently recorded the highest number of enterprises throughout the historical series analyzed.

Employees

The number of employed individuals **with at least one contract** has **increased** across all core zones, while the **average number of contracts per person** has **gradually decreased**.



Source: authors' elaboration based on data from Agenzia Piemonte Lavoro

Economic impact

Land Market

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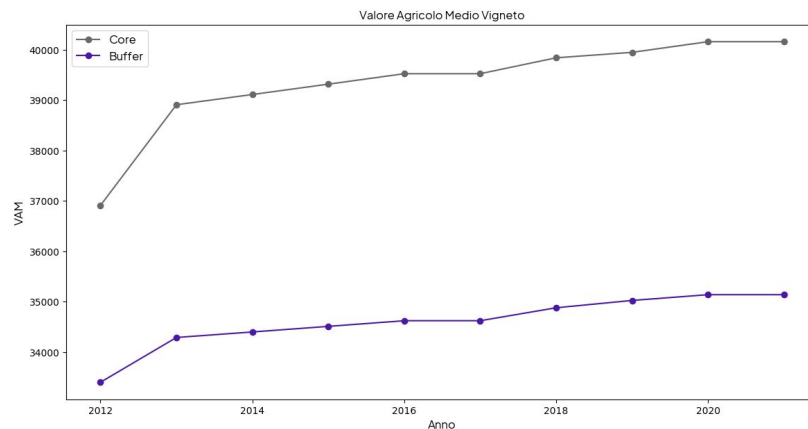
Ettari vitati

The **core zones** show generally **stable trends**, with the exception of the **Langa del Barolo**, which has experienced a **steady increase** in the area dedicated to viticulture.

VAM

VAM – Orchards: A significant and **steady growth** phase was observed up to 2016, followed by a peak in 2017 and a more moderate increase from 2018 onwards.

VAM – Vineyards: Both the core and buffer samples recorded a **sharp increase between 2012 and 2013**, followed by a **more gradual upward trend after 2013**.

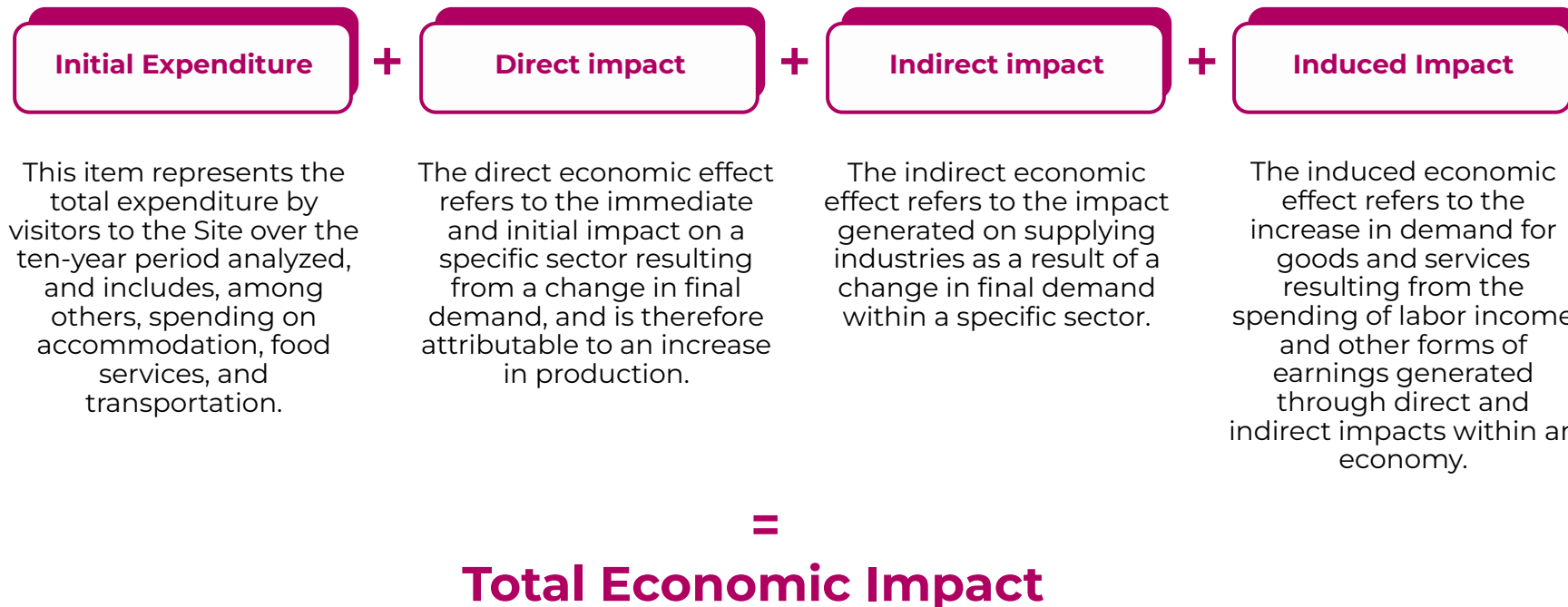


Source: authors' elaboration based on data from the Agricultural Registry – Summary Data (Piedmont Region)

Economic impact

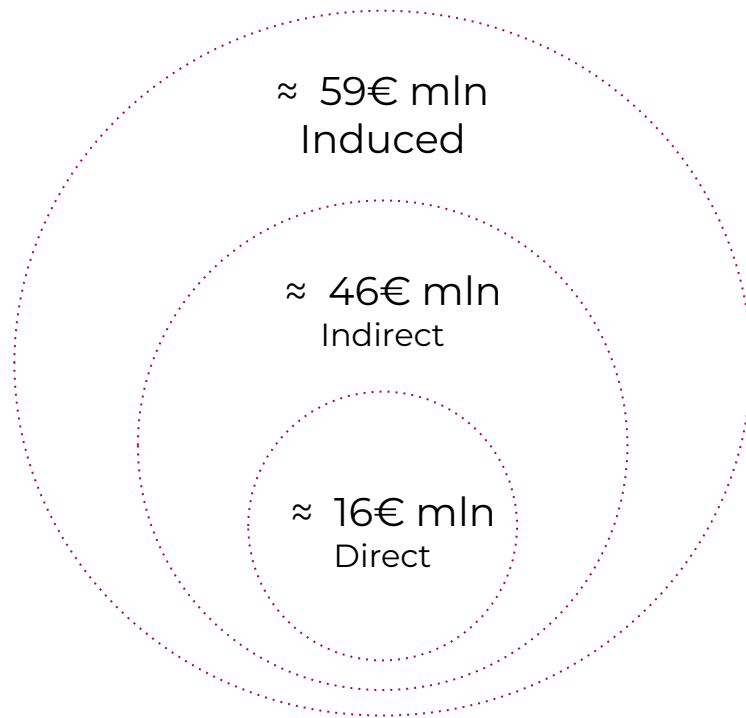
Impact dimensions

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Economic impact

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88€ mln
Initial expenditure

Over the past ten years, the Site has generated direct spending amounting to €88 million, with an indirect and induced multiplier effect on the economy of approximately €62 million, resulting in a total economic impact of around €121 million.

$\approx 121\text{€ mln}$

$\approx 209\text{€ mln}$

**Total
economic
impact**

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In summary, for every €1 spent, there has been a return of €2.37.

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Communication Impact

Communication Impact

Methodology

The analysis of communication impact included a study of **media coverage**, involving the identification and evaluation of **national and international press reviews** following the UNESCO designation, as well as an **estimation of the economic value equivalent** to the media attention garnered by the UNESCO Site.

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Communication

Monetary quantification of the equivalent value attributable to the media attention surrounding the UNESCO Site.

330

The research catalogued **330 articles**.

32mIn

The estimated **Advertising Value Equivalent (AVE)** amounts to €32 million

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***When and why** has the UNESCO Site been covered by traditional and digital media, both in Italy and abroad?
What key messages have been conveyed, which values communicated, and **how frequently?***

The study of communication impact **aims to evaluate the economic value of media coverage**—both **offline** (print, radio, TV) and **online** (web outlets, blogs, etc.)—garnered by the Site “The Vineyard Landscapes of Piedmont” following its UNESCO designation. This visibility is assigned a theoretical monetary value based on the cost of purchasing equivalent media space.

Communication Impact

Media coverage

The study of communication impact revealed a **significant increase in media visibility** for the Langhe-Roero and Monferrato territories at both national and international levels. An increasing number of articles refer to the “Vineyard Landscapes of Piedmont” as a “World Heritage Site,” emphasizing particularly its attractions and tourism potential.

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330

The research catalogued **330 articles** published abroad in 16 languages **across 45 countries**, frequently appearing in prominent international outlets such as The New York Times, The Wall Street Journal, Le Figaro, Forbes, Die Welt, El Mundo, among others. These articles predominantly **portray the Site's territories as destinations for refined gastronomic experiences.**

Communication Impact

Advertising Value Equivalent

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The **Advertising Value Equivalent*** of the media coverage generated by the Site was calculated based on press and broadcast appearances recorded over three specific years (2014, 2018, and 2023), followed by estimations extrapolated for the entire ten-year period analyzed.

The estimated AVE
amounts to **€32**
million over a
ten-year period.



This figure is **116.3 times**
greater than the
communication and PR
expenditure of the
managing authority of the
Site.

**Advertising Value Equivalent (AVE) assigns a monetary value to the media coverage generated by an event by estimating the advertising cost of purchasing the space occupied by the related press or broadcast appearances.*

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Conclusions

Conclusions

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The research highlighted that the UNESCO designation has exerted **varying impacts depending on the variables and territories examined.**

While the increased visibility of the Site at both national and international levels is undeniable—bringing benefits to the tourism industry and fostering local economic development—it is important to emphasize that these positive outcomes are driven by specific zones and exemplary municipalities, and are not uniformly generalized across the entire area.

Significant Differences in Regional Outcomes



It is necessary to avoid the risk of homogenization.



Strategies are needed that assess the benefits and challenges of the distinct territorial identities.

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Dissemination policies aimed at increasing residents' awareness of the Site.

Research team

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Guido Guerzoni
CEO & Founder
g.guerzoni@formules.it
+39 347 4624928

Lisa Giovannitti
l.giovannitti@formules.it

Irene Rotellini
i.rotellini@formules.it

Ruggero De Blasi
r.deblasi@formules.it

Anna Crepaldi