OIV-UNWTO
Project on Wine Tourism Measurement

7th UNWTO Global Conference on Wine Tourism
La Rioja, Spain
24 November 2023

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The Initiative

Memorandum of Understanding signed between OIV and UNWTO in 2020 with the aim of:

“Promoting wine tourism as a tool for rural development, social inclusion along with the promotion and recognition of the world of wine, its heritage and commitment to the SDGs”.

→ Creation of a Working Group in 2021, with representatives from Ministries of Tourism and Agriculture and wine tourism experts from 12 countries (Argentina, Chile, France, Georgia, Germany, Hungary, Italy, the Netherlands, North Macedonia, Portugal, Slovenia, and Spain)

Objectives

- Map existing data and methodologies to quantify/measure wine tourism at the national level
- Propose common indicators to measure wine tourism in a consistent way at the global level
- Provide recommendations on how to measure wine tourism
- Launch pilot projects to test the methodology
STEP 1. Survey on the state of the art of wine tourism measurement

Objectives

- Getting a better understanding of wine tourism and the national plans/strategies that are put in place to foster it
- Mapping wine tourism data collection (what?, who?, how?, when?)
- Obtaining a list of the most relevant researches/studies on wine tourism in each country
- Getting information on the main challenges and obstacles to data collection

Structure of the survey 10 questions

Target Ministries of Tourism

Deadline 15 October 2022

Participating countries Argentina, Azerbaijan, Bosnia & Herzegovina, Brazil, Chile, Croatia, Czech Republic, France, Greece, Georgia, Hungary, Italy, Lebanon, the Netherlands, Portugal, Republic of Moldova, Slovenia and Spain
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**STEP 1. Survey on the state of the art of wine tourism measurement**

**Main findings**

- **47%** of countries do **not** have a national policy, plan or strategy specifically dedicated to wine tourism.
- **75%** of respondents said that supply-side information on wine tourism is available, but the real struggle comes from demand-side data.
- **66%** of countries do **not** systematically collect data on wine tourism.
- **50%** of countries do **not** have national programmes aimed at improving data collection on wine tourism.
- **45%** of the respondents indicated **no** research or studies on wine tourism have been carried out in the last two years.
- **78%** of countries do **not** have indicators to measure the impact of wine tourism on SDGs.
STEP 1. Survey on the state of the art of wine tourism measurement

Main findings

85% of the respondents reported one or more of the following obstacles to collecting data on wine tourism:

• Lack of technical, financial and human resources
• Lack of motivation for wineries to provide data
• Wineries collecting data not in a homogenous way
• Highly diversified offer makes data collection even more difficult
• Lack of representative samples, with data often collected only in a few wine regions or from a few large wineries
• « Definition » issue: difficult to distinguish wine tourists from other types of tourists
• Lack of cooperation and coordination among different national and subnational institutions
• Lack of a consistent, uniform and systematic approach at the national level
• Lack of digital means that would facilitate the task
STEP 2. Towards the definition of a set of Key Performance Indicators

Criteria

1. The main **objective is to measure how many wine tourists there are in the world**, ideally with a breakdown by nationality, and **have a clear picture of the supply side as well as its evolution**

2. The set of **indicators will be exclusively focused on volume**; the measurement of the economic, social or environmental impact of wine tourism is very important and should be considered in the future

3. The set of volume **indicators** for wine tourism will be proposed **based on the following parameters**:
   a. It should measure the **factors that public policy can influence**
   b. It should **measure the observed behaviours** or preferences, as opposed to subjective opinions
   c. It should offer **analytical connections to linked industries**
   d. It must be **practicable** to implement
   e. The **source of information** must be easily accessible
   f. Indicators must be **easy to interpret**
STEP 2. Towards the definition of a set of Key Performance Indicators

Supply-side indicators

▪ Number of wineries with wine tourism activities
▪ Number of wine museums
▪ Number of wine-related events (B2C)
▪ Specific information on the wineries:
  • Location
  • Type of wine production
  • Number of employees
  • Touristic activities offered
  • Average prices of touristic activities
STEP 2. Towards the definition of a set of Key Performance Indicators

Demand-side indicators

- Number of visits to:
  - Wineries
  - Wine museums
  - Wine-related events (B2C)

- For each visitor, the following information should be collected:
  - Nationality/country of residence
  - Age
  - Gender
STEP 2. Towards the definition of a set of Key Performance Indicators

Demand-side indicators

Ideally, the information on each visitor should also include:

- Education profile
- Profession
- Income profile
- Involvement in wine (knowledge, interest, etc)
- Wine consumption frequency
- Wine taste preferences
- Wine purchase and consumption preferences
- Length of stay in wine regions
- Number of wineries visited during the trip
- Travel party
- Organization of the trip
- Transportation mode
- Overall travel satisfaction
- Number of bottles purchased during the trip
- Value of bottles purchased during the trip
- Source of information about the destination (web, social media, friends, ...)
- Interests about the destination besides wine
STEP 2. Towards the definition of a set of Key Performance Indicators

Methodological Challenges

a) How to define a wine tourist for statistical purposes?

b) How to estimate the total number of wine tourists from a partial number of visits?

c) How to define a wine region and how to interpret data on daily visitors and overnight stays?
STEP 2. Towards the definition of a set of Key Performance Indicators

The use of new data sources: a valid alternative to traditional data collection methods for wine tourism?

Digital technologies are significantly impacting the tourism as well as wine sector, thus offering great opportunities for data collection.

The use of big data coming from alternative data sources can be a possible solution to many issues and challenges related to data collection on wine tourism.

The UNECE classification of big data identifies three major categories:

- Mobile Positioning Data (MPD) for tracking purposes
- Payment card data
- Web activity, including search engines, online travel agencies, or social media
STEP 3. Recommendations to establish a data collection system (short-term)

- Establish a common framework of concepts, definitions, and methods;
- Agreement with all parties involved on a common template with a clear set of data;
- Data should be limited to relevant information only;
- Collaboration and cooperation is key (public/private, tourism/wine, academia);
- The creation of an observatory dedicated to wine tourism proved to be an effective strategy in many countries;
- It is important to provide the right incentives to all parties involved;
- Consider the existing statistical projects, as a starting point;
- A recurring protocol should be established for the centralized compilation of information on wine tourism;
- There should also be a procedure for the processing and use of the information stored and the dissemination of knowledge.
STEP 3. Recommendations to establish a data collection system (long-term)

- Data collected should be included in the official statistics of the country
- Introduce a question on wine tourism in border questionnaires and/or in booking systems
- Using new sources of information on trends such as GPS data, social media, etc.

+ list of good practices taken from “Principles governing international statistical activities” by the UN Committee for the Coordination of Statistical Activities (CCSA)
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STEP 4. Case Studies

Chile
(Enoturismo Chile)

Spain
(Acevin)

Argentina
(Observerio Economico de Turismo del Vino - OETV)
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NEXT STEPS

- **Q1 2024**: presentation of the Scoping Paper at a webinar

- **2024/2025**: pilot tests in countries willing to start measuring wine tourism at the national level with the proposed set of indicators

- **2024/2025**: presentation of the Scoping Paper to UNWTO and OIV Statutory Organs and identification of new axes of work (definitions, etc)
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