



OIV-UNWTO Project on Wine Tourism Measurement

**7th UNWTO Global
Conference on Wine
Tourism**

La Rioja, Spain

24 November 2023



Giorgio Delgrosso
Head of Statistics &
Digital Transformation Department (OIV)





OIV-UNWTO Project on Wine Tourism Measurement

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



OIV-UNWTO Project on Wine Tourism Measurement

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



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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



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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**



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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



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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



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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



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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**?



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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



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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



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STEP 3. Recommendations to establish a data collection system (long-term)

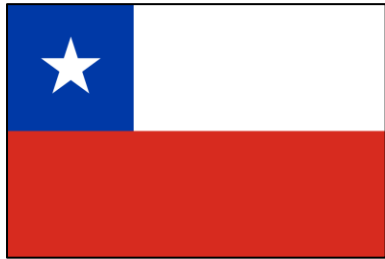
- Data collected should be included in the **official statistics** of the country
- Introduce a question on wine tourism in **border questionnaires** and/or in booking systems
- Using **new sources of information** on trends such as GPS data, social media, etc.

+ 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
(Observatorio 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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