vinetur

Italian Wine Tourism Grows Despite Business Gaps

Survey Finds Wineries Struggling With Marketing, Booking Systems and Local Support

Monday, May 4, 2026



Italy’s wine tourism sector is growing, but a new industry survey suggests that many wineries are still struggling with basic business problems that limit how much of that growth they can capture.

The 2026 study by Wine Tourism Hub, presented at Vinitaly Tourism and based on responses from 176 hospitality managers and numerous international tour operators, shows a market with strong demand, especially from the United States, but also one marked by weak coordination, limited digital tools and uneven support from local

institutions. The findings point to an industry that is becoming more valuable and more competitive, yet remains fragmented in ways that make it harder for many wineries to turn visitors into steady revenue.

The survey was introduced by Lavinia Furlani, president of Wine Meridian, and Stefano Tulli, co-founder of Winedering. Together, they outlined a picture of Italian wine tourism that is expanding in scale but still lacks the systems needed to support that growth. The report says the global wine tourism market is worth $46 billion and is growing at an annual rate of 13%. In Italy, ISMEA data for 2024 show 15 million visitors and €3 billion in spending tied to wine tourism.

For hospitality managers, the biggest challenge is not simply improving the visitor experience once people arrive. The most common concern, cited by 36.8% of respondents, is how to bring the right tourists to the winery in the first place. Another 19.7% said the main issue is making sales after the visit sustainable. More than half of those surveyed, 51.3%, said direct sales after a visit account for between 20% and 50% of their hospitality revenue, which shows how important the tasting room has become as a commercial channel.

Even so, many managers said they do not feel adequately supported by local institutions or wine consortia. Most rated those entities poorly when asked about their effectiveness in promotion. The main obstacles they identified were a lack of financial resources, cited by 31.6%, and difficulty building partnerships with local organizations, cited by 27.6%. Fragmentation was also named as a major barrier by 36.8% of respondents, along with weak infrastructure, also cited by 36.8%.

The report suggests that wineries with stronger organization are outperforming others regardless of budget size. Structured wineries recorded annual visitor growth of 16.8%, a sign that management practices may matter more than spending alone. The average amount spent per visitor in Italian wineries has also risen sharply, from €140 to €178 in two years, an increase of 28%.

American travelers remain especially important to the sector. The survey describes U.S. visitors as the most profitable customer group, with average spending of about €400 per person. Tour operators in the United States also see Italy as their top destination for

2026, and 88% expect sales to grow this year. At the same time, 63% said booking windows are getting shorter, with decisions now often made only 20 to 45 days before departure.

That shift is putting pressure on wineries to respond faster and sell more clearly online. Tour operators said their biggest frustrations are slow replies, unclear pricing and the absence of online booking systems. Without online availability, wineries become harder to find in searches made through artificial intelligence tools and other digital platforms that increasingly shape travel planning.

The operators also said they want basic standards before they can sell winery visits more effectively: fluent English-speaking guides, transparent net rates and flexible hours that include weekends. Those expectations are becoming more important as travelers book later and expect immediate confirmation.

Technology adoption remains limited across much of the sector. According to the survey, only 1% of Italian wineries have adopted artificial intelligence solutions so far. That gap could leave many businesses outside the most qualified tourist flows if they do not modernize their booking and communication systems.

The report argues that wine hospitality in Italy needs to move from being treated as an add-on service to being managed as a business unit with clear performance indicators and profitability goals. If given an extra €50,000 to invest tomorrow, 44.8% of hospitality managers said they would spend it on marketing and social media, while 36.8% would put it into renovating spaces for visitors.

The broader message from the survey is that Italian wine tourism has strong international appeal and real economic potential, but its future will depend on whether wineries can work together more effectively and adopt professional standards that make their experiences easier to buy, easier to find and easier to scale.