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Italian Diners Still Put Wine at the Center of the Restaurant Experience

A new survey found 88% link wine choice to meal quality even as younger adults shift toward ordering by the glass

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Wine remains a central part of the restaurant experience in Italy, even as consumers become more price-conscious and younger diners shift toward ordering by the glass, according to new findings presented by Federvini and research firm TradeLab in Rome.

The survey found that 88% of consumers consider the choice of a good wine or sparkling wine fairly or very important to the overall quality of a restaurant meal. The data comes from TradeLab research based on a sample of 1,000 consumers, weighted to reflect Italy’s population by age and gender, and was presented during Federvini’s general assembly in recent days.

The results arrive at a time when Italy’s broader out-of-home market remains large but wine consumption in restaurants is changing. Federvini’s observatory said total out-of-home consumption in Italy closed 2025 at €102 billion, with 9.6 billion visits. Independent restaurants led the sector with about €55 billion in value, slightly above the previous year.

Within that market, wine and sparkling wine still carry strong symbolic and practical weight for diners. Beyond the 88% who linked wine choice to the quality of the experience, 54% said they were fairly in agreement and 27% said they were very much in agreement that wine is indispensable when celebrating a special event or occasion. Consumers also associated wine with improving food, making the atmosphere more convivial, turning dinner into more than simple accompaniment, serving as a reward after work or study, and helping people connect with the identity of a place.

Among wine drinkers, who made up 84% of the sample and who eat at restaurants, 41% said they drink wine often and 24% said they always do so when dining out. For sparkling wines, those figures fell to 30% and 8%. Overall, 65% said they drink wine always or often when having dinner at a restaurant, but that rate varied sharply by venue type. It reached 88% in high-end restaurants, where 47% said they always order wine. In mid-range restaurants it was 69%, with 21% saying always. In lower-priced restaurants it dropped to 39%, with only 8% saying always.

Sparkling wine showed a similar pattern. TradeLab found that 73% consume it always or often in high-end restaurants, compared with 37% in mid-range venues and 18% in lower-tier ones.

Age and income also shaped behavior. The highest frequency of wine orders was among consumers ages 45 to 54, at 69%. Sparkling wines were strongest among those ages 25 to 34. Income gaps were also clear: among respondents earning more than

€80,000 a year, 85% said they always or often drink wine at restaurants and 71% said the same for sparkling wines. Among those earning less than €20,000, those shares fell to 56% for wine and 27% for sparkling wines.

Food pairing was the leading factor in choosing a wine at a restaurant, cited by 59% of respondents. Price followed at 48%, then grape variety or type at 30%, geographic origin at 19%, producer or brand at 17%, alcohol level at 17%, restaurant type at 15%, waiter recommendation at 15%, curiosity about trying something new at 13%, and denomination at 11%.

The strongest increases in importance over time were price, food ordered and wine type. That shift reflects broader pressure on spending. According to the survey, 32% of respondents believe restaurant wine prices have risen more than other product categories over the past two years, while 19% said they rose less and 49% said they rose by about the same amount.

Consumers are responding in different ways. Some 37% said they keep their budget unchanged but may switch styles or categories. Another 33% said they do not pay attention to price and continue choosing the wines they prefer. But 30% said they save money by selecting wines in a lower price range.

Most spending remains concentrated below €35 a bottle. The survey found that 56% spend less than €25 on a bottle of still wine and 36% spend between €25 and €35. Only 7% spend €35 to €50, and just 1% go above €50. For sparkling wines, 47% spend less than €25, 39% spend €25 to €35, 12% spend €35 to €50 and 2% exceed €50.

The preference for lower price points was strongest among consumers ages 65 to 74, with 68% usually spending under €25 on a bottle. Consumers ages 25 to 34 were most likely to buy bottles priced between €25 and €35, at 50%. Those ages 35 to 44 were the most loyal to bottles priced between €35 and €50, though that group still represented only 10%.

The report also showed that not all categories performed equally well in restaurants during 2025. More than half of white wine drinkers, or 51%, said their consumption had not changed over the year. But 35% reduced it while only14% increased it, producing a

negative balance of20%. Similar declines appeared across red wines at -20%, Prosecco at -16%, sparkling wines at -22%, rosé at -28% and Champagne at -31%.

Those declines were concentrated mainly in mid-range and lower-priced restaurants. In high-end dining, white wines posted a balance of -8%, compared with -31% in lower-tier venues. Red wines were nearly stable in high-end restaurants at -0.3%, versus -28% in lower-priced ones. Prosecco even showed growth of +2% in high-end venues while falling -31% in lower-tier restaurants.

That split matters for beverage producers and restaurant operators because it suggests premium on-premise accounts remain more resilient even as broader demand softens. It also points to growing pressure on pricing strategy, glass-pour programs and portfolio mix as consumers trade down or change formats rather than leave the category entirely.

One of the clearest shifts involves how younger adults order wine. While bottle sharing remains the preferred format overall for53% of respondents, compared with24% who prefer a glass and22% who say it depends on the occasion, younger consumers are moving toward single-glass service. Over the past year, preference for ordering by the glass rose25% among those ages18 to24 and24% among those ages25 to34.

Among younger respondents who choose wine by the glass,43% said it helps them limit or better control consumption. Another37% cited avoiding waste,27% pointed to saving money or spending less, and20% mentioned staying within legal driving limits.

Bottle service still carries social advantages for many diners. Some60% said sharing a bottle makes dinner more convivial, while48% said it is more economical overall. By contrast, glasses were favored mainly for convenience and speed, cited by34%, and because they allow diners to vary wines during the meal, cited by30%.

The findings also suggest room for restaurants to improve communication around beverages without starting from zero. Some65% of respondents said they were fairly satisfied with how dining room staff tell the story of wine, while14% said they were very satisfied. At the same time,60% said they are fairly or very interested in seeing a restaurant’s wine list published online before choosing where to dine.

Interest is also expanding into newer segments, though traditional categories remain dominant. Some62% said they are fairly or very interested in finding organic or natural wines on restaurant lists. Interest was lower for nonalcoholic or low-alcohol wines at44%, suggesting an emerging but still selective market.

Preferences by style remained broad but familiar. Across total mentions, white wine ranked first at73%, followed by red wine at64%, Prosecco at55%, sparkling wine at36%, rosé at34% and Champagne at7%. But when respondents were asked for their first choice only, red wine led at41%, ahead of white wine at31%, Prosecco at13%, sparkling wine at7%, rosé at7% and Champagne at1%.

Among consumers ages18 to24, white wine was especially strong:80% said they prefer it when dining out, compared with57% for red wines and44% for Prosecco. White wine led across all age groups included in the study.

Not everyone drinks wine in restaurants. The survey found that16% of respondents do not consume it when dining out. Their reasons included not liking wine, preferring beer, attention to wellness, rising prices, concern about driving penalties and dissatisfaction with available offerings. Among those who do not drink sparkling wines in restaurants, who accounted for21%, the main reasons were preference for beer and higher prices.

Those responses suggest competition inside beverage menus is becoming sharper as consumers weigh cost, moderation and occasion more carefully than before. For restaurants and drinks suppliers alike, beer’s role as an alternative choice and consumer sensitivity to pricing could shape future menu design and sales strategies across wine, sparkling categories and other alcoholic beverages.