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A new report says Italy leads four European markets in wine tourism spending

Average bookings reach 107 euros, 26% above France, with direct wine purchases generating 60% of the total

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Italy generates the highest average spending per wine tourism booking among four major European markets, with travelers spending 107 euros per reservation, according to a new report discussed at an industry event in Peschiera del Garda. The study said

that figure is 26% higher than in France and places Italy ahead of Portugal and Spain.

The findings were presented during the Salotto Nadia Zenato discussions at Tenuta Sansonina, where producers, researchers and hospitality executives examined the prospects for Italian wine tourism and the opportunities in foreign markets. The report, Enotourism: the Markets of Germany, Austria, Switzerland and France, was prepared by Roberta Garibaldi in collaboration with Fine Italy and Sansonina.

The research combined more than 2,000 interviews, an analysis of online review sentiment and 15,000 actual wine tourism bookings. It focused in part on how travelers from German-speaking countries and France view Italy as a destination and what drives their choices.

One of the clearest results was the role food and wine play in Italy’s image abroad. The report found that 55% of travelers from Germany, Austria and Switzerland identified food and wine as the first element they associate with Italy, ahead of art and monuments. Among French travelers, that share was 34%.

The study said destination choice depends heavily on the wider experience around wine, not only on the fame of a label. Rural landscapes were considered important, with ratings from 7 to 10 out of 10, by 83% of respondents from German-speaking countries and 88% of French respondents. The presence of local restaurants seen as authentic was also a major factor, cited by 70% of travelers from the German-speaking area and 81% of French travelers.

The report said wine tourism is usually part of a broader vacation rather than a single-purpose trip. Among travelers from Germany, Austria and Switzerland, 59% visited one or two wineries. French travelers were more likely to build a more intensive itinerary, with 40% visiting three or more wineries. The research also found that French interest is spreading beyond traditional areas, with Mount Etna in Sicily now matching Chianti as a desired destination, at 40% and 39%, respectively.

The study highlighted another point that researchers described as counterintuitive. In Germany, one in three winery visitors did not travel to a region primarily for wine. Instead, wine became part of a trip shaped by scenery, food and nature. That finding

supports the argument made by several speakers that wine tourism works best when it is tied to a broader local identity.

The spending data also showed how much direct sales matter to wineries. According to the report, 60% of the average booking value in Italy comes from wine purchased directly at the winery. The profile of visitors is also changing. More than four in 10 wine tourists are under 35, suggesting that the sector is drawing a younger public than many operators may assume.

Italy’s reputation in the market appears strong in other measures as well. The report said Germany is the leading international market by number of reviews in Italy’s appellation areas, second only to Italy itself, and that satisfaction levels in all the markets analyzed were above 85 out of 100.

Garibaldi, a professor at the University of Bergamo and president of the Italian Food and Wine Tourism Association, said the main challenge for Italy is not only to attract more visitors to wineries but to make wine a structural part of destination competitiveness. She said international tourists are looking for landscapes, culture, gastronomy, authentic relationships and an overall experience that reflects the identity of a place, rather than simply a well-known wine name.

Garibaldi said that turning that potential into long-term value will require stronger coordination among destination management organizations, consortia, institutions, businesses and local communities. In her view, wine needs to be integrated into a shared destination strategy with clear responsibilities and common objectives.

Lamberto Frescobaldi, head of the Frescobaldi Group and president of the Italian wine trade association UIV, said wine tourism can provide needed support for wineries at a difficult time, especially for producers able to offer strong service and add value to their bottles. But he said winery visits should remain an addition to the core business, not a substitute for it, arguing that producers must continue to focus on bringing their wines to markets in Italy and abroad.

Frescobaldi said visitors should not feel as if they are entering a museum. He said the most effective experience is personal and authentic, giving guests a sense of the territory that restaurants cannot fully provide on their own.

Producer Nadia Zenato said the numbers show Italy is a highly desired destination, but she warned against complacency. She said authenticity cannot be declared in marketing language and must instead be shown through practical details, such as speaking to visitors in their own language, giving them time, taking them into the vineyard and explaining the work behind the land.

Chef Andrea De Lillo of the Michelin-starred restaurant Nin said recognition begins before guests arrive. He said many decisions are made online or over the phone, which makes it essential for wineries and destinations to present a clear identity from the start.