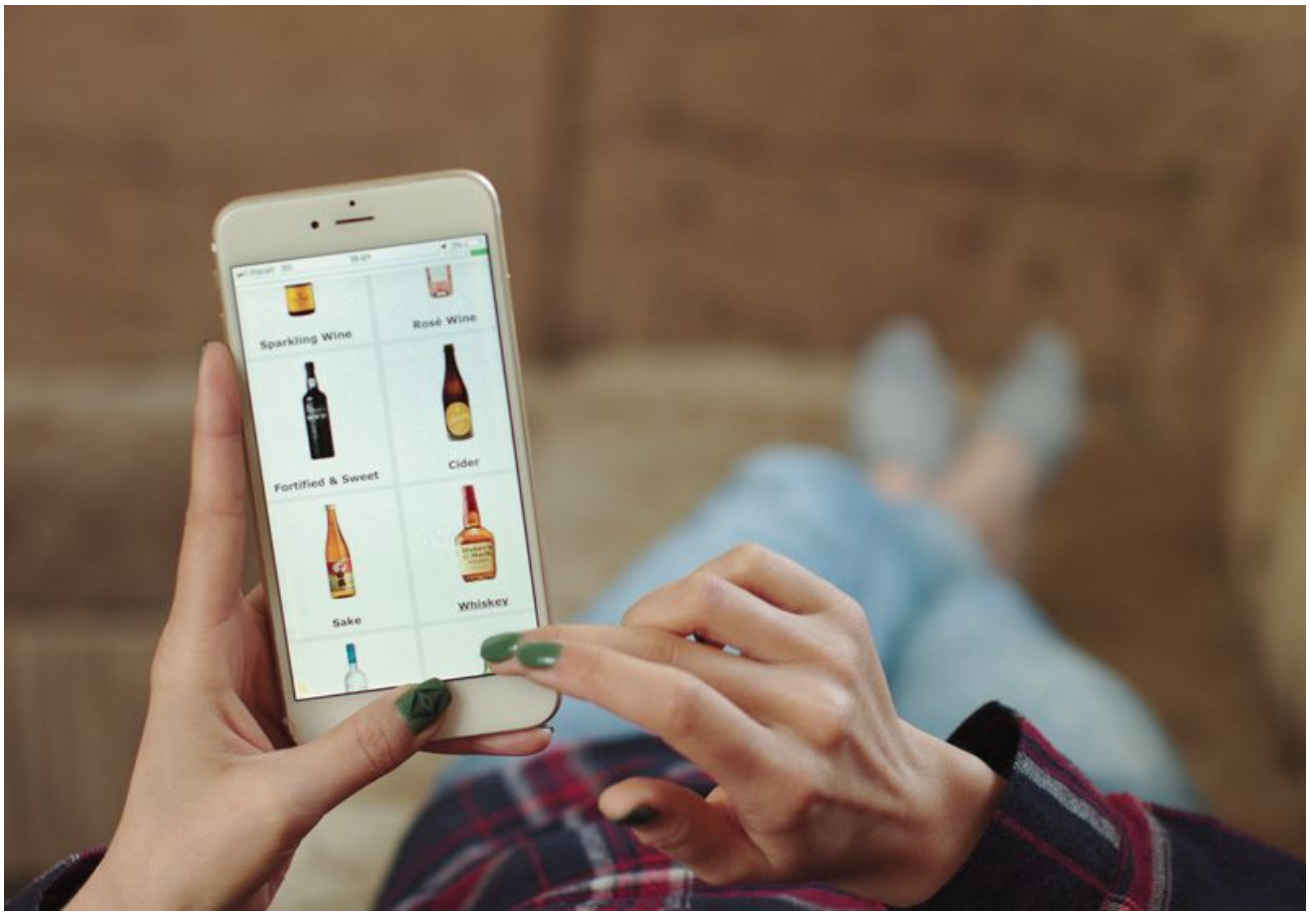
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Italian wineries struggle to turn digital reach into measurable sales, Quodigi study finds

The survey of 33 producers found digital competitiveness outpaced analytics, with average scores of 56.3 and 40.6

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Italian wineries have built a broad digital presence, but many still struggle to show how online activity turns into bottle sales, winery visits or other commercial results, according to Quodigi’s Wine Observatory, which examined a sample of 33 wineries in

September.

The study found a clear gap between visibility and measurement. Quodigi's Digital Competitiveness Index gave the group an average score of 56.3 out of 100, with Donnafugata leading at 74, followed by Banfi at 70. Ca' del Bosco, Cusumano and Antinori each scored 69, and Frescobaldi reached 67. Twelve wineries scored above 63. But the average score for analytics was much lower, at 40.6, compared with 59.6 for performance in digital media experience. Cà Maiol posted the strongest analytics score, at 61.

That gap points to a broader problem for producers that manage websites, social media, digital ads and online sales channels at the same time. A winery can be active across several platforms and still lack a clear view of what users do, which campaigns lead to purchases and which markets respond best. For wine producers and other beverage companies, that matters because direct-to-consumer sales and international customer acquisition depend increasingly on digital spending that can be measured, adjusted and tied to revenue.

Website traffic in the study showed how international the market has become for many Italian wine brands. In July, the 31 websites analyzed recorded a combined 442,058 visits, with a median of 4,897 visits per winery. The median share of traffic from Italy was 75%, but several wineries drew a majority of their audience from abroad. Mionetto stood out most sharply, with Italy accounting for just 10% of visits. Banfi followed at 26%, Masi at 28.7%, Frescobaldi at 31.6% and Proseccov8 at 32.5%. Overall, 11 wineries had less than 50% of their traffic coming from Italy.

The foreign mix also varied by brand. For Antinori, the United States represented 20% of visits. For Banfi, the U.S. share was 27%. For Valdo, Germany accounted for 16.8%. In absolute terms, Antinori had the most visited website, with 113,418 visits in July, followed by Banfi with 74,561 and Donnafugata with 46,253. The data suggests that strong international interest does not automatically translate into sales unless producers match those audiences with language, content and buying paths suited to each market.

Search demand also moved unevenly across brands. Looking at Google searches from August 2025 through August, Quodigi found that overall interest peaked in the week of Dec. 21, 2025, with an index of 200, and bottomed on March 1 at 74.3. Comparing the first and last 13 weeks of the period, Jermann rose 39.3%, Mionetto gained 11% and Donnafugata increased 7.1%, while Cavit fell 17.8%, Antinori dropped 9.7% and Feudi di San Gregorio declined 9.1%. Quodigi said the analysis was possible for only eight wineries because search data for the other 25 was not distinctive enough.

Advertising data showed that wineries often use digital channels more to tell a brand story than to push immediate sales. Between September 2025 and August, Quodigi detected 2,305 Meta ads tied to 19 wineries. The report also identified nine wineries with no detectable ads during that period, including Donnafugata, Masi and Ca’ del Bosco, while it did not clarify the status of the remaining five wineries in the sample. The most common theme was territory, vineyards and landscape, which appeared in 627 ads, or 27.2% of the total. Winery experiences were featured in 314 ads, and food and pairing content in 281.

Ads aimed more directly at transactions were less common. The study counted 247 ads focused on shop links or purchases, 178 tied to holidays and gifts, and 101 promoting discounts or promo codes, equal to 4.4% of the total. The strategies differed widely by producer. More than half of Cusumano’s and Cavit’s detected ads centered on territory, while about two out of three ads from Villa Nichesola promoted winery visits. Antinori included a shop link in 72% of its detected ads. Ad volumes rose in the fall, peaked in November 2025 and increased again between June and July. During Black Friday 2025, Costa Arènte, Proseccov8, Bricco dei Guazzi and Torre Rosazza used the shared code LEONEBLACK30.

Social media numbers told a similar story: reach did not necessarily mean engagement. Instagram was the most widely used platform, adopted by 32 of the 33 wineries, with a median of 15,580 followers. Antinori had more than 251,000 followers but an engagement rate of 0.53%. Valdo, with 19,700 followers, posted the strongest engagement among profiles with more than 5,000 followers, at 5.70%. The median engagement rate on Instagram was 0.60%.

On LinkedIn, used by 10 wineries, the median account had 10,102 followers and a median engagement rate of 0.75%. Antinori again had the largest audience, with 48,600 followers and a 0.96% engagement rate. Facebook data was available for six wineries and showed a median engagement rate of 0.28%, with Villa Russiz leading at 0.34% on 7,800 followers. Sixteen wineries had a YouTube presence, but communities were generally small, with a median of 417 subscribers. Only two wineries were active on TikTok.

E-commerce presence was broad but fragmented. Twenty-seven of the 33 wineries appeared on at least one online retailer, spread across more than 140 platforms and 501 offers. Tannico carried wines from 13 wineries, Bottle of Italy from 12 and Vino.com from 11. But broad placement did not mean deep product assortment. Bottle of Italy listed 49 offers, or roughly four wines per winery on average, while Tannico carried fewer than two labels per winery on average.

Discounting was relatively limited. The study found 33 discounted offers, equal to 6.6% of the total, involving 17 wineries. The median discount was 13.1%, with a range from 5% to 40%. Only five promotions reached or exceeded 20%. Torre Rosazza had the highest number of wines on promotion, at seven. Among the steepest discounts recorded were Mionetto Sergio White Edition on Spesup at 40% off and Valdo Blanc de Blancs Aquarius Extra Dry on Vino.com at 25.5% off.

Amazon played a smaller role, with only nine of the 33 wineries present on the platform. Quodigi noted that the monthly sales indications visible there were estimates based on the sales bands shown by Amazon and did not represent actual winery revenue data. On proprietary online stores, the report identified WooCommerce for Donnafugata, Banfi and Bottega Vini, and Shopify for Valdo and Omina Romana. Villa Russiz and Mionetto were also found to have active shopping carts on their own sites.

Taken together, the findings show an Italian wine sector that is active online but uneven in how it connects traffic, advertising, social attention and e-commerce to business targets. For beverage producers trying to improve direct sales or justify marketing budgets, the benchmark is not simply how many followers, visits or listings they have. It is whether those channels can be linked to measurable outcomes across different markets, and Quodigi’s data suggests that many wineries still have work to do

on that front.