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Enlightening consumption behavior: The case of Italian wine in the Mexican market

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Abstract. In this project we will explore the consumption behavior of wine in Mexico, with focus in Italian Wine, as Italy is one of the top producers of wine worldwide. Wine is starting to consolidate in the consumer preferences in Mexico, however, there is much more to know and understand about the preference and cultural habits of wine consumption. Our aim is to enlighten and reveal the opportunities in this market where consumption is growing and information available is low, therefore we dig into history, cultural and social aspects of the country. This contribution for the industry also gathers different insights and recommendations carried out from a survey held during 2020 that can help to implement strategic decisions to reach the Mexican consumer.

1 Introduction

According to a Unicredit group report of 2018 [1], global consumption of wine has been increasing on average 6.6% yearly for the last 15 years, and what it is important to highlight is that the redistribution of the world consumption is moving with a continued increase of demand in emerging economies like in South America and Asia. Such growth is also reflected in Mexico.

The consumption of wine in México has duplicated in the past 10 years, which gives room to a continued growth and opportunities to further explore how to develop this market more. At the same time, the increase in consumption has positively impacted the import of wine to the country as result of it. Nevertheless, in México, Italian wine is the 3rd most imported wine.

The Mexican wine market remains small if it is compared with other regions around the world. However, México is a country of over 120 million inhabitants with an increasing interest in wine, on top, it is part of the G20 as emerging economy. The growing tend encyopens up the possibility to introduce the culture of wine and position some varieties of Italian grapes which can match the local taste. Therefore, this project gives us the tools to understand and explore what the consumption behavior of wine in Mexico is.

Most of the efforts and studies are conducted into other phases of the value chain like viticulture, viniculture and other key technical process to guaranty quality; in addition to all sustainable new trends and practices where researchers have a specific focus for environmental and healthy purposes.

Moreover, in the past centuries and decades consumption patterns and demand has been changing and adapting through the time. In some markets exist more information available than others that enables to have a broad panorama in the wine field. Thus, our focus to the Mexican market will be revealing and a turning point for wine industry opportunities.

2 General aspects

The consumption preferences of wine are changing and the demand for wine is increasingly international. Wine consumption is growing in countries that were not traditional consumers, while in Europe it has been decreasing (Corrado & Odorici, 2009) [2]. In first instance, European countries produced 81% of the world volume in the 1970, now Europe produce around the 60% of the global wine.

Globalization expanded opportunities for new world producers, as they have lower cost on production and they started disrupting the traditional industry with innovation in packaging, corks, distribution, grapevine growing technics and so on; these can direct impact on final prices. In addition, new world producers tend to leverage with branding and marketing strategies (Bartlett & McAra, 2017) [3] as some of them are big corporations with expertise in other fast moving consumer goods, therefore for them it is a common practice to pursue low-cost structures.

2.1 Italian wine exports and trends

According to OIV (International Organisation of Vine and Wine) [4] on the 23rd of April 2020 press release, the wine global production in 2019 is estimated at 260 mhl (million of hectolitres) (excluding juices and musts). Italy remains as the leader with a total production of 47.5 mhl, France with 42.1 mhl and Spain 33.5 mhl. Together these three countries account for 48% of world wine production. In an international comparison we can observe the great relevance and standpoint of Italy in the world wine industry, however in terms of leadership as an exporter, the global value of wine exports has been dominated by France over the years, then Italy and Spain.

In 2019 the world wine export is estimated at 105.8 mhl, with an increase in volume of +1.7% and value of +0.9%. The strongest increase in export is from Italy (+2.0 mhl) and Spain (1.3 mhl). The good performance of export growth from Italy in 2019 before the Covid situations is remarkable, the strategies put in place from the sector and producers are effective and with this trend Italy´s leadership position is expanding once again.

Each Italian regions produce different type of wines between them and some have higher reputation in red

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wines while others lean towards white wine. Italy´s competitive advantage where the industry can leverage is from its diversity, the large variety of types of wine and grape varieties offers the consumers options for every taste preference. Some regions are very well known in international markets, while some others can still increase their reputation and reach other markets where their wines are not known yet. The native grapevines should continue to be promoted because they offer particular attributes from the region they come from, which are unlikely to be found in the same way elsewhere.

2.2 Wine industry in Mexico

There is a point in the history when wine consumption spread in the new world. The next major expansion of worldwide viticulture begins more than 1,000 years after the fall of Rome when Vine cutting and seeds accompany the Spanish Conquistadores to central and South America (Estreicher, 2006) [5]. Most of wine drinkers won´t associate Mexico with wine production, but as a matter of fact the journey of Vitis vinifera from Europe to North America begins in Mexico with the arrival of Hernan Cortez in 1520s and from there, it will expand to the rest of the continent.

The arriving immigrants brought with them the drinking customs and wine was the favorite alcoholic beverage for many Spanish settling in the new land. They also needed sacramental wine for Mass with the main objective the evangelization. Consequently, as it was part of the daily diet for the Spanish, it was needed in large amounts to fulfill both necessities.

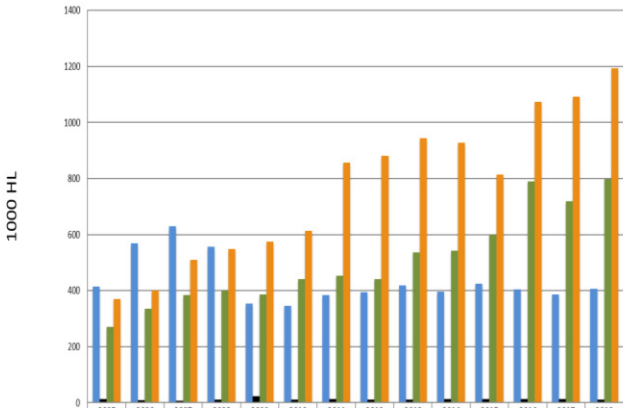
In the ensuing decades wine production was so successful that king Phillip II of Spain ordered the destruction of the industry, New Spain’s wine was a commercial threat, thus all the wine production for commercial reason disappeared, with exemption of wine for religious purpose. From this moment the Mexican wine industry entered a dark age for nearly four centuries (Crowley, 1989) [6].

The circumstances never allow this market to build and gain reputation nor presence at international levelsas a wine producer country like other new world producers did. The lack of infrastructure and scarce focus in this industry kept Mexico away from the panorama. However according to Crowley (1989) was brandy, not wine, that led to a revival of vineyard planting to increase distillate of wine in the 1930s, thus European brandy producers saw an opportunity and they built distilleries in Mexico in the 1950s.

2.3 General trade of wine in Mexico

Though traditionally a beer and tequila drinking country with a total population of 120 million habitants, Euromonitor (2014) reports that wine consumption is on the increase in Mexico, especially amongst the new wealthier middle class and young people, moreover, middle class is creating demand for premium wines allowing producers to focus on this segment.

The Mexican market for wine is fragmented with numerous local and international players. The Consejo Mexicano Viti Vinicola (2014) [7] states that wine category has been growing at 12% over the past decade, with Mexicans purchasing 26% of national wine and 74% imports (Covarrubias & Thach, 2015) [8]. An important fact is that wine ´s import is growing exponentially to cover the increasing demand, the volume already duplicated in the past 10 years as we can see in Figure 1 from 400,000 hl in 2008 to 797,000 hl in 2018. In 2018 the imports for over 800,000 hl had a value of 231,3 million Euro with a 49% increase from the previous year 2017 (Pantini, 2020) [9].



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Wine production	415	568	630	557	353	346	385	394	418	397	425	404	387	406
Wine exports	13	9	7	10	24	11	12	11	11	12	13	12	12	10
Wine imports	271	336	384	400	386	440	454	440	537	543	599	789	719	797
Wine consumption	369	401	509	548	575	614	857	882	944	928	815	1074	1093	1193

Figure 1. Yearly wine trade from 2005 to 2018 – Mexico (Adapted from OIV).

According to MarketLine (2017) [10] in 2021, the Mexican wine market is forecast to have a value of €2,029 million, a 49.5% increase from 2016 value. With a total consumption of 1 mhl in 2016. Mexico is positioned in the 6th position on total consumption from the continent after USA, Argentina, Canada, Brazil, and Chile. Still wine is the largest category segment accounting the 60.7% of the market´s total value, then sparkling wine accounts 30% of the market and fortified wine the 9.3% in 2016.The preferred type of wine has been changing in the last decade, opening opportunity to sparkling wines with a share increase from a 14% in 2006 to 30% in 2016.

The national production of wine in Mexico covers approximately the 30% of the total demand of wine consumption. Wine was ignored in the past, nonetheless today it looks that the path is in the right direction. The consumption is becoming a regular behavior in certain cities, the tendency is that more restaurants are including wine in their beverage menu, something that was exclusive for certain type of high-end restaurants in the past.

Local production is not sufficient to fulfil the current consumption demand, thus the rest of the demand is cover with imported wines. This situation presents an opportunity for Italian and foreign wines to enter the country, to be tasted and remain in the mind of the consumer.

2.4 Current situation of Italian wine in Mexico

The bilateral economic and commercial relation between Italy and Mexico are solid with an exchange of 5,202 billion Euro in 2017. According to ISTAT [11] Italian´s exports grew +15.1% during 2017. Nevertheless, an update in the Free Trade Agreement EU-Mexico was made in April 2018 with the intention to make easier commercial activities. As reported by SACE SIMEST (2020) [12] Mexico ranks as the 2nd most relevant country in America for Italian export destinations, and 24º in general, this considering all type of exports.

Manenti from Ice Agenzia mentioned that in 2008 Italian wine exports to Mexico where around 11 million Euro, from this point, nobody expected that in 2017 will account 35 million Euro, an exponential increase in one decade of +208% (Rainoldi, 2018) [13]. He also explains that the preferred type of wine that is most consumed is Lambrusco followed by Prosecco and Asti, however there is an evolution in the taste preferences. Nowadays there is a starting demand of native varieties as well.

Moreover,in an interview to Marina Nedic for Wine Meridian (2019) [14] she stated that Italy is between the 5 principal commercial partners for the emerging market of Mexico, and it registers a double digits growth (+10.3% in value and 15% in quantity), this results are over the average behavior from other imports market (+2.9% in value and +5.6% in quantity) (Wine Monitor Nomisma data) a trend that does not show that will decrease in the following years. She also said that wine in Mexico is considered as a symbol of status, and that the interest in the younger generations is growing.

The consumption in young adults and medium-high income population is very marked; afterward, wine culture continues opening into other typologies. Moreover, she concludes that some elements like the low regional production of wine, opens the doors to big opportunities for Italian producers, as they can outlook to cover that necessity that cannot be fully do by local producers.

3 Consumption behavior

The change in consumption behavior in the population brings at the same time changes in the industry. In old world or traditional wine producing countries, quality is becoming a central element of the decision-making, with an evolved market where the consumer knows about regions, designation of origin, type of grapes and so on, making this a more sophisticated market where premium wines are highly appreciated. However even though in these old-world countries the consumers have an evolved knowledge, the per capita consumption in some of the regions is decreasing, on the contrary new world countries consumption is increasing.

Certainly, we have to consider that there is a big gap of time difference between when wine first appeared in the society of these countries and when they made it part of their culture. Furthermore, the different social, economic, and political situations have been influencing the lifestyle and preferences of the population, giving raise to periods with different consumption habits and necessities.

In the case of wine, for some people in emerging countries exists a misconception that it is an expensive product. Nowadays it is easier to find more varieties of wine from different countries with affordable prices, but decades ago wine consumption was more exclusive for high-income people. This perception must change as with the globalization there is shift of mindset and it became easier to import goods at better cost.

3.1 Social and cultural influence

Wine choices are influenced by a large number of factors, including social and cultural factors.Culture is one of the driving forces of consumption behavior; it can affect the way consumers perceive a product, service, or situation.

According to Sethna & Blythe (2019) [15], consumption habits are learned, and the consumer behavior is based on the learning process. This suggests that wine choices are dynamic and evolve over time as the experiences are enriched and the stimulus are developed.

To understand wine consumption in Mexico it is important to understand the food cultural influence in this region and some part of the country´s history as well. The nobility of wine is that it can always be the perfect companion to stand out what we have on our plate. Mexican cuisine attained the status by UNESCO as an Intangible Cultural Heritage of Humanity; the variety, diversity of ingredients, textures, flavors, and scents, makes it already an outstanding complex cuisine with character and presence.

Mexican food is built around corn, beans, chili pepper, tomato, lemon, and chocolate. Corn or Maize principally takes form of tortillas which are consumed along with any type of other local dishes.

As we mentioned before, culture is learned and with the repressive situation when vineyards and production was destroyed, it is very likely that anything associated with wine became negative for many years and generations. From my point of view, this period in the Mexican history directly affected the wine consumption culture. The perception towards all references about wine, producing and consuming shift into sign of troubles. But two centuries already passed and the situation is different now. The culture about wine is starting to change with a complete turnaround. Hence a lot of research must be made to understand the consumers' perspective to be able to accompany the change of mindset and find the opportunities in the wine industry in this region.

3.2 Current consumption in Mexico

Per capita consumption is reported to be 1.2 lt. in 2016 as we can see in Figure 2, low estimation far from countries like France (49.5 lt.), Italy (43 lt.) or USA (12.3 lt.). However, several studies and experts estimate that the growing trend will continue with that favorable tendency for the following years. Other Latin countries like Argentina have a per capita consumption of 25.2 lt., Chile 15.7 lt. and Brazil 2 lt.Mexico´s consumption is on the way to reach the levels of Brazil, which now is considered a relevant country in the wine industry and different organizations give a closer focus in its development like the Italian Association Wine Monitor – Nomisima and OIV.

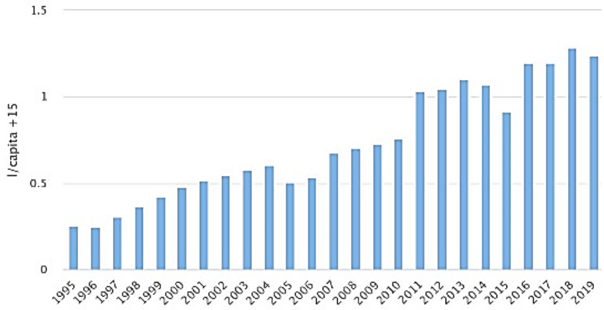


Figure 2. Per capita consumption in Mexico (Source OIV).

Although the 1.2 lt. per capita is a national level, in the metropolitan area it is estimated to be 8 lt. per capita. As a reference to the most consume beverage, which is beer, the per capita consumption of beer is over 60 lt.

According to Viticulture Mexican Council the distribution of the type of wine consumed is 59% red wine, 14% white wine, 12% sparkling wine and the rest varieties accounts 15%. The estimated average price per bottle in 2017 was $3,47 dollars. Regarding the main cities for consumption, the principal is Mexico City, followed by Queretaro; other relevant cities are Puebla, Guadalajara, Monterrey and touristic destinations like Cancun.

4 Survey analysis

To gather information and insights a 21 questions survey was developed and conducted in Spanish only to Mexican´s consumers residing in the country (México). Respondents answered a series of questions to enable us to get a general overview on their wine consumption habits and other beverage preferences, and then other questions to determine their attitude toward Italian wine such as moments of consumption, purchase stores, attitude related to wine styles, involvement, and other key areas that we will discuss further on.

Table 1. Sample characteristics and respondents.

Variable	N	Percentage
Gender		
Female	60	52.63%
Male	54	47.37%
Age (Generation)		
Generation Z (18-25)	12	10.53%
Millenniar (26-35)	44	38.60%
Generation X (35-45)	14	12.28%
Baby Boomer (46+)	44	38.60%
Region in México		
South	44	38.60%
Center	58	50.88%
North	12	10.53%
Studies		
Postgraduate	34	29.82%
University	64	56.14%
High School	11	9.65%
Incomplete	5	4.39%

4.1 Results

The most relevant results are going to be addressed here.

Our first question was about what type of alcoholic beverage is the most preferred, in the top 3, the 43% stated that their preferred alcoholic beverage is wine, followed by Tequila with the 17.5% and beer with 14%.

In terms of frequency the groups with more age consume wine with more frequency per weekthan the youngest segment.

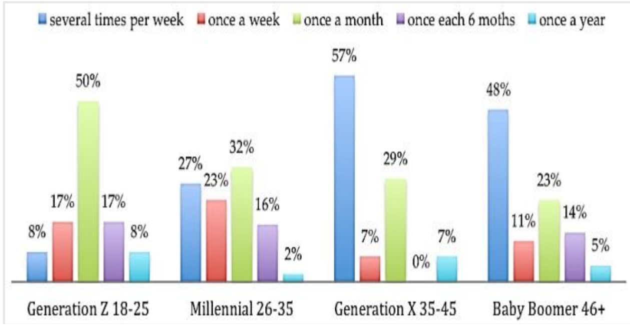


Figure 3. Frequency of wine consumption.

Regarding the level of wine knowledge, most of the respondents defined themselves having a basic knowledge (58%) or even any knowledge (12%) about wine (Fig. 4); age or gender did not imply influence in the behavior from this variable.

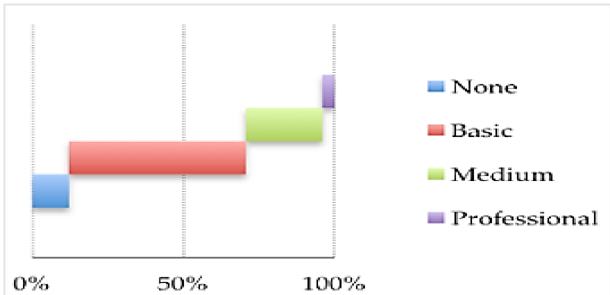


Figure 4. Wine knowledge.

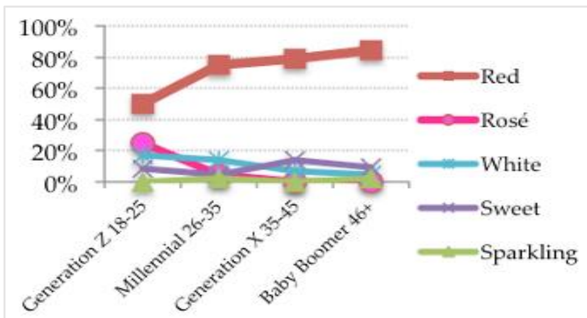


Figure 5. Wine preference.

A question related to the preferred type of wine, interestingly, there was no significant difference between the four generations in the most preferred wine (Fig. 5). The 76% of the respondents chose red wine as their preferred option. However, the youngest generation showed more interest in rosé style and white wine. It is pertinent to say that this generation is more open to try other styles of wine than oldest generation.

A different question was made to understand the average knowledge into Italian wines and to know which type of wines from Italy they have tried before.

The most recognized type of Italian wine for this market is Lambrusco; 46% of the survey respondents mention it as one of the Italian´s wine they know, the second type they know or have tried is red style of wine with 38%, the 33% had tried white. Sparkling wine or Prosecco was mentioned by the 24% of the respondents, finally Rosé was mention for the 24% of the respondents and only 3% acknowledge to not know or tried any Italian wine at the moment.

When asking about their perception of the quality of wines coming from Italy, it is remarkable the good perception and recognition about this region, the 60% perceive Italian wine to have high quality and 39% with medium quality.

In terms of shopping channels, most of the respondents were most likely to purchase their wine from specialized stores like Enoteca or liquor´s stores as you can see in Figure 6, followed by Supermarkets as the most preferred channel to do their wine purchase.

What is interesting about this finding is that the only group who mention price clubs' stores as an alternative of their wine purchase is the oldest generation (Baby Boomer).

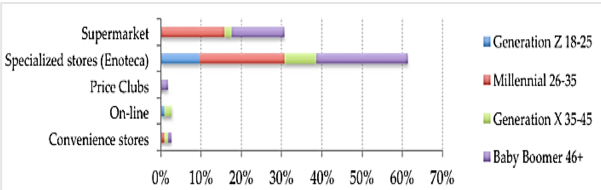


Figure 6. Where do you prefer to buy Italian wine?

When asking about what triggers their decision in selecting a wine. The 27% stated that for them is relevant that they had try the wine before, especially for female respondents, they want to know what to expect.

In Figure 7 you can observe other two important variables that equally influence their decision, one is friends' recommendation, and the other is their own search. In this case is more likely that males are more willing to conduct a search by their own before buying a wine. In the case of females, before they purchase, they have the tendency to follow or accept recommendations mainly coming from friends or experts. Advertisements do not show to be relevant neither the aspect nor the design of the bottle or the general presentation of the wine.

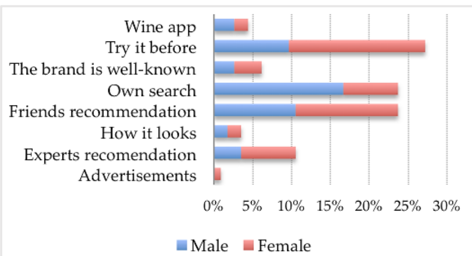


Figure 7. On what do you base your decision when you select a wine?

The question to analyze is the type of preferred flavor or taste they like the most in a wine (Fig. 8). The 54% respondents lean towards the fruity flavors. Fruit taste is by far the most important characteristic among all the participants. The aromatic profile that comes from the fruit components makes this style of wine to be appreciated the most.

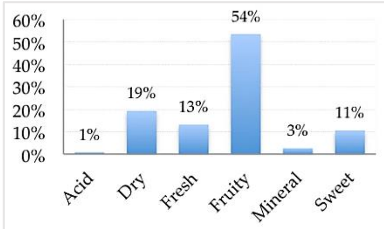


Figure 8. Which type of taste do you prefer in wine.

When asking about the moment of consumption in general terms the preferred moment to consume wine by 48% of the respondents is during dinner for both females and males consumers.

Figure 9 measures the attitude of Mexican people who are Spanish speakers towards the language of the wine label, it was important to understand if they find confusing when they choose an Italian wine, because the label and information from the bottle comes in Italian.

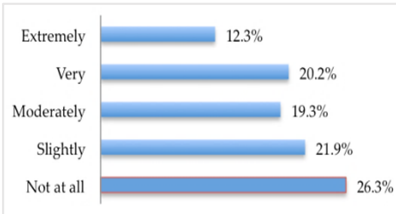


Figure 9. A label in a different language give you conflicts in the selection of the wine?

When assessing price and quality (Fig. 10). The respondents' attitude, show from a moderate to an important relation towards price/quality relation. Around the 65% pointed out that the price they pay for a quality wine could become an important matter in their choices.

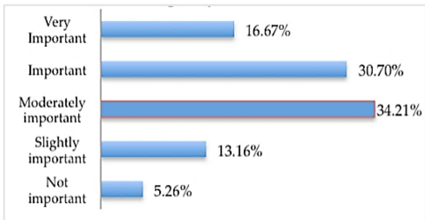


Figure 10. How important is the price you pay for a quality wine?

On the other hand, when asking about how interested the consumers are into trying new grapes and brands, it is notable a huge interest and curiosity into discover new different brands and grapes. Figure 11 shows that the 30.7% of respondents find themselves very interested to try different brands and types of grapes but even more respondents find it extremely interesting. The 47.4% of the respondents remark this interest.

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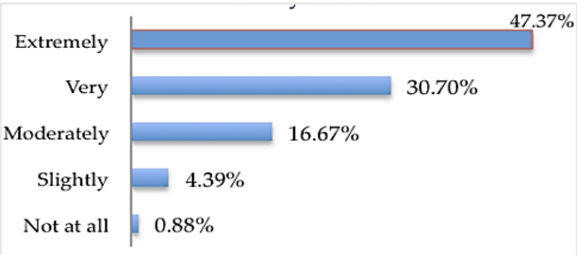

Figure 11. How interested are you to try new brands or different type of grapes you have not try before?

Furthermore, the territory of México can be different in terms of weather and seasons when compared with Europe and other countries where wine is more frequently consume. The average temperature is higher and constant during the year. Most of the restaurants and shops are enable with air conditioning to give a pleasant experience in their facilities. That is why it was important to measure their attitude towards the ambient temperature influence on the beverage type they choose.

At Figure 12 we can see that the attitude is disperse among the different preferential categories, however for the 28.9% of respondents it is very likely that the temperature of the environment influences their choice. What can be said from this is that when respondents go to a place, they don´t go with a predisposed beverage in their mine to order, it could depend on the moment before they make a decision about what to consume.

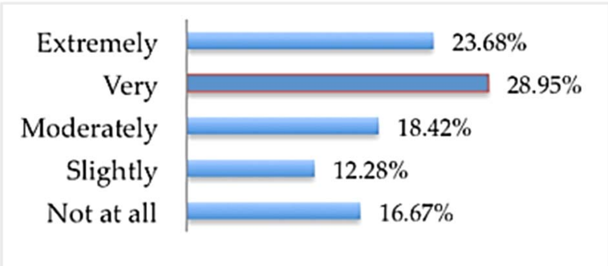

Figure 12. The temperature if the environment influences your choice about what type of beverage you will have?

One of our last questions was about food pairing, and if they base their beverage selection according with the food choice from that specific moment.

As you can observe in Figure. 13 is that the majority´s attitude shows that food it is an important factor that influences their beverage selection. The 69.2% of the respondents indicate that they perceive an extremely influence at the moment of choosing a beverage depending on what they are having for food.

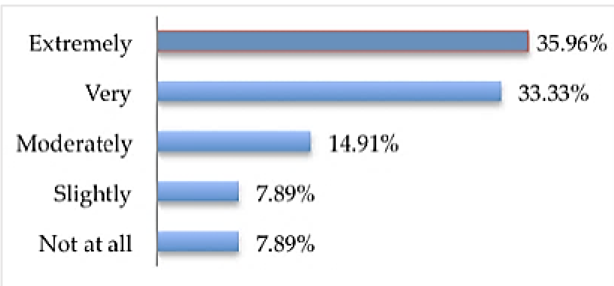

Figure 13. The type of meal you are having influence your choice about the type of beverage to consume?

4.2 Leveraging the consumption of Italian wine

Fruit aromas and taste were most preferred by the majority. To offer more if this style of wine could be a strategy to follow, in a way to create awareness and acceptance from Italian wines from this particular taste, instead of using other style for this young market that is starting to discover the wine world. For instance, grapes that could match this profile and taking into consideration the versatility to pair it with some of the most popular ingredients in the Mexican cuisine could be in the case of white: Malvasia, Vermentino. For red wines some of the options could be Primitivo, Negroamaro, Valpolicella, Dolcetto and Cesanese. Sangiovese and Nebbiolo grapes don't need introduction as they are well recognized and easily to find also in Mexican market. What we should take into consideration is the great advantage of grape diversity that exists in Italy and leverages them to compete over other international varieties that can be found in the Mexican market easily from foreign countries and internal production.

Nevertheless, it is true that consumers in Mexico are eager to know different Italian grapes and flavors, however it is the result of the current limited diversity of Italian wines in this market The initiatives of Made in Italy should be reinforced in this category. For the younger generations it is a good moment to introduce and create experiences with other styles like sparkling wine with Prosecco and the rosé style. They are open and willing to experience new styles.

5 Discussion and Conclusion

This study highlights new information about the consumption behavior of Italian Wine in México. Not only in this country exist a lack of understanding about the consumption behavior. For instance, coming from a general perspective about the wine industry, Mabray (2020) [16] mention that it exists a lack of consumer understanding and accurate insights about the real market. Instead, the focus is for aspirational target, which at the end, it is not the reality and what the market craves. Thus, the necessity of current consumer is not cover or is misunderstood hence, some opportunities are missed in the market to add value into their experience.

It is important to underline that Mexico is developing more wine consumers and increasing per capita consumption year after year. The importance that consumers have on relying in previous experiences will be a factor to gain and keep new costumers. Income is lower than for example the USA even that these two countries are next to each other, however Italian producers and distributors should not underestimate the potential and opportunity that they could have if they implement a different strategy and focus in this market like Chilean and Spanish´s wine producers do.

Most of the population in México has a basic knowledge about wine. This implies that in order to establish Italian wine under their preferences, some efforts have to be made in terms of educating and informing the consumers. Promotion must be made to gain position in strategic places like specialize stores and restaurants.

Different approaches can be taken to share and differentiate the attributes of Italian wine from other international type of grapes. However, it should be made step-by-step positioning a certain type of variety to let the consumers know it, remembered, and embrace it. The goal should be to create a familiarity attitude towards taste to influence their purchase decision in the future. A crucial factor would be to be persistent and constant in building recognition from a single region or variety, instead of overwhelming and trying to position to many different varieties, which at the end will create confusion.

We also learnt that recommendations are important. In this sense some training for people who are the face at specialize shops should be consider by giving them the tools to command the information about Italian´s wine.

Food also plays a role that influences the beverage selection, in this case producers can include pairing suggestion that match with some dishes. The use of information in the backside of labels can be a good strategy to approach this necessity for this market and to make easier for them to find something according to their need.

I would like to conclude saying that it does not exist only one correct wine for every single occasion. For some, this is the biggest quest when it comes to find a specific wine for a specific food or occasion, however there is a wine style that suits anyone and any occasion. The complexity and the constant evolution are what make this product coming from the nature beautiful, it gives us no limitations and infinite new combination of taste and flavors to discover. Nevertheless, all initiatives and strategies should always consider and be done with a reminder to drink with moderation.

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