

# MEXICO ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, September  
2024



# Introduction

CGA by NIQ's focus is to **measure, understand and consult** on the On Premise channel in many countries around the world.

In these times of regular change in both consumer needs, and in the very infrastructure of the channel, **robust data-driven insights and consultation** has never been more important.

For over 3 years, we have been committed to providing monthly, custom research designed specifically to add value to the topic areas that you, our valued customers, have told us are important.

Based on the incredible value that clients have told us these reports have delivered, we are continuing these in 2024 in Mexico as a way of **tracking key metrics in the On Premise and exploring hot topics as they arise.**

This update covers new research into the Mexican On Premise looking into topics such as **past, current and projected future visitation, On Premise behavior, Independence Day, and Fall focus.**

During 14<sup>th</sup> – 16<sup>th</sup> August 2024, CGA by NIQ surveyed 1,197 respondents aged 18-54 predominantly from Mexican cities/urban locations on their expectations, desires and how they plan to behave in the next month.



# CGA BY NIQ CONSUMER TOOLS

*Additional Consumer Reporting where CGA by NIQ's expertise can be leveraged*



## CUSTOM RFP SUPPORT DECKS

*Take chain-specific sales stories to your national account customers to speak to their consumers and showcase how your portfolio aligns with their strategies*



## CONSUMER SEGMENTATION

*Strategically and effectively target specific On Premise drinkers to identify offerings and opportunities that relate to them, ensuring \$ are spent more effectively in On Premise brand building*



## OPTIMUM ASSORTMENT

*CGA's assortment tool allows you to enable your teams to showcase the optimal range for outlets and highlight where brands should be placed within a range to achieve highest sales and increase customer satisfaction*



## CUSTOM RESEARCH

*From online surveys to focus groups and in-outlet interceptions, CGA has access to millions of consumers across the world to answer your most important questions*



## PATH TO PURCHASE

*Understand the decision corridor consumers go through when purchasing products, and identify how these choices impact the decisions that result in final sales*



## BARTENDER RESEARCH

*Bartenders and servers are the final touch point of influence in the channel. With such change, understanding advocacy and bartender needs is extremely important in influencing the sales of your products*

# KEY METRICS/ON PREMISE VISITATION

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- In the past month, 7 in 10 consumers have visited the On Premise for food, while half have visited for a drink. Both food and drink visitation levels have risen since the previous wave.
- Looking ahead to next month, visitation levels are expected to remain consistent with this wave.
- For those who have visited the On Premise in the past month, footfall is primarily over the weekend, with Saturdays being the most popular followed by Fridays.
- Almost two thirds of On Premise monthly visitors have visited venues in the past week, with visitation levels being similar for both food and drink visits.
- Beer remains the most favored alcoholic beverage of choice, as 3 in 4 have consumed the category in the On Premise over the past month. Tequila and whiskey are notably popular spirits. Soft drinks are the top non-alcoholic option, with almost 4 in 5 consuming the category, this is followed by coffee.
- Over half of consumers have tried a new drink in the On Premise in the past month, with cocktails being the most popular choice for experimentation and non-alcoholic beer coming in second.
- Looking at satisfaction levels across consumers most recent visit, they express high satisfaction with the value for money, the excitement of the drink, and the overall quality of the service across all drink categories. Consumers are especially pleased with the excitement offered by BevAl categories, while hot tea is noted for its good value and quality of serve. Satisfaction levels are also consistently high across different factors for visiting the On Premise, with the majority being satisfied with the cleanliness/hygiene and quality of service.
- For future visitation, over a third plan to visit more frequently than they did in the past month, though 1 in 5 intend to reduce their On Premise visits.

# Key metrics & On Premise visitation



# LOOKING BACK



# 72%

of consumers have been out  
to eat in the past month

+5pp vs. August 2024

# 48%

of consumers have been out  
for a drink in the past month

+4pp vs. August 2024





71%

of consumers plan to go out  
to eat in the next month

+6pp vs. August 2024

49%

of consumers plan to go out  
for a drink in the next month

+4pp vs. August 2024





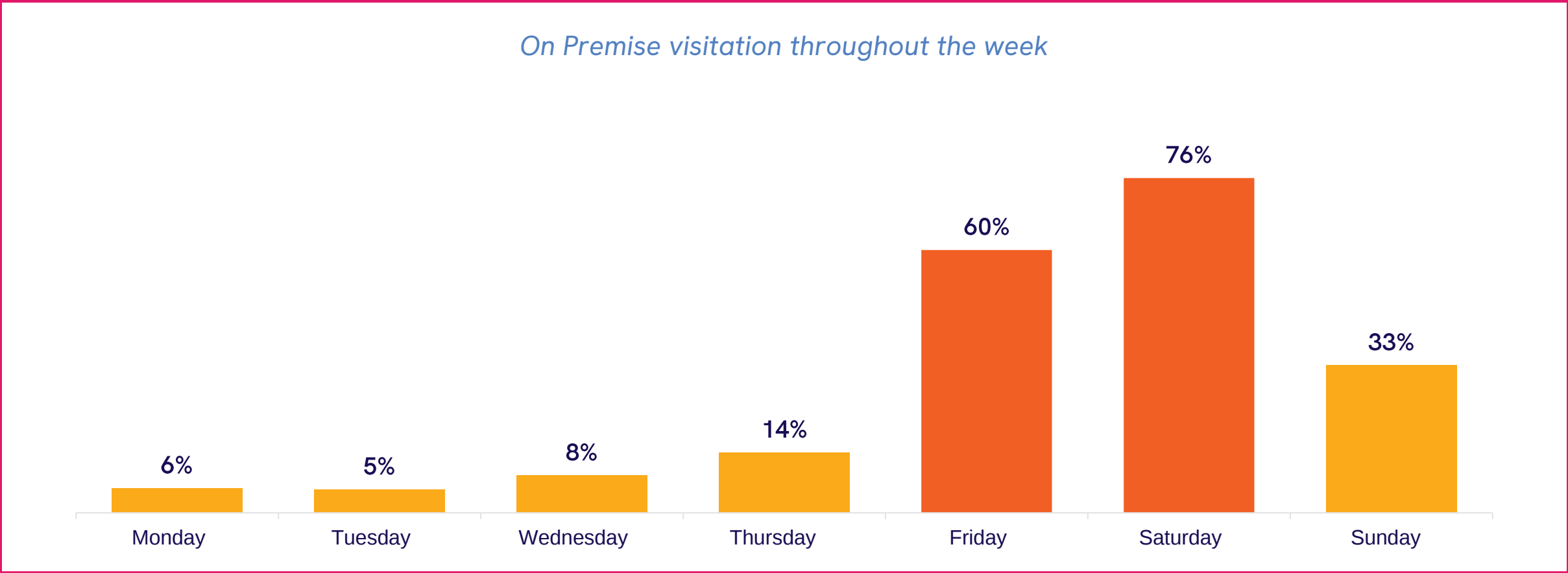
WHICH OF THE FOLLOWING BEST DESCRIBES  
THE LOCATIONS OF THE BARS, RESTAURANTS  
OR SIMILAR VENUES THAT YOU MOST  
TYPICALLY VISIT?

*Locations of On Premise venues visited*



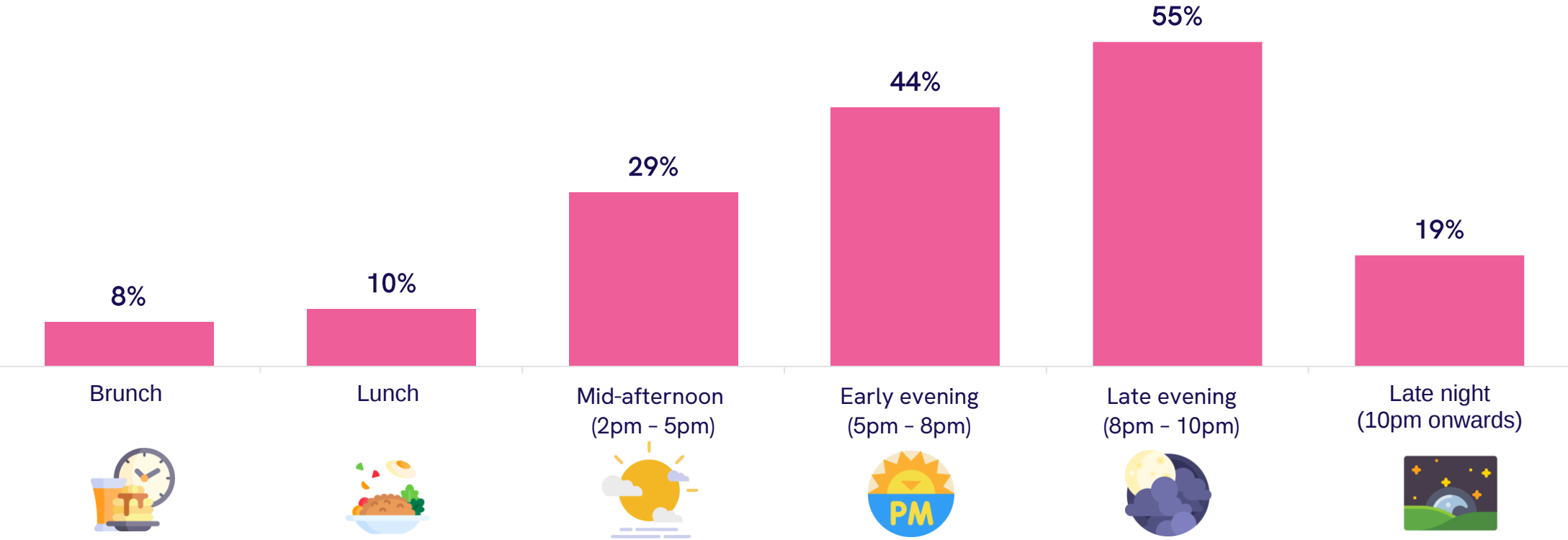
| City locations | Suburban | Rural |
|----------------|----------|-------|
| 91%            | 8%       | 7%    |

# ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE IN THE PAST MONTH?



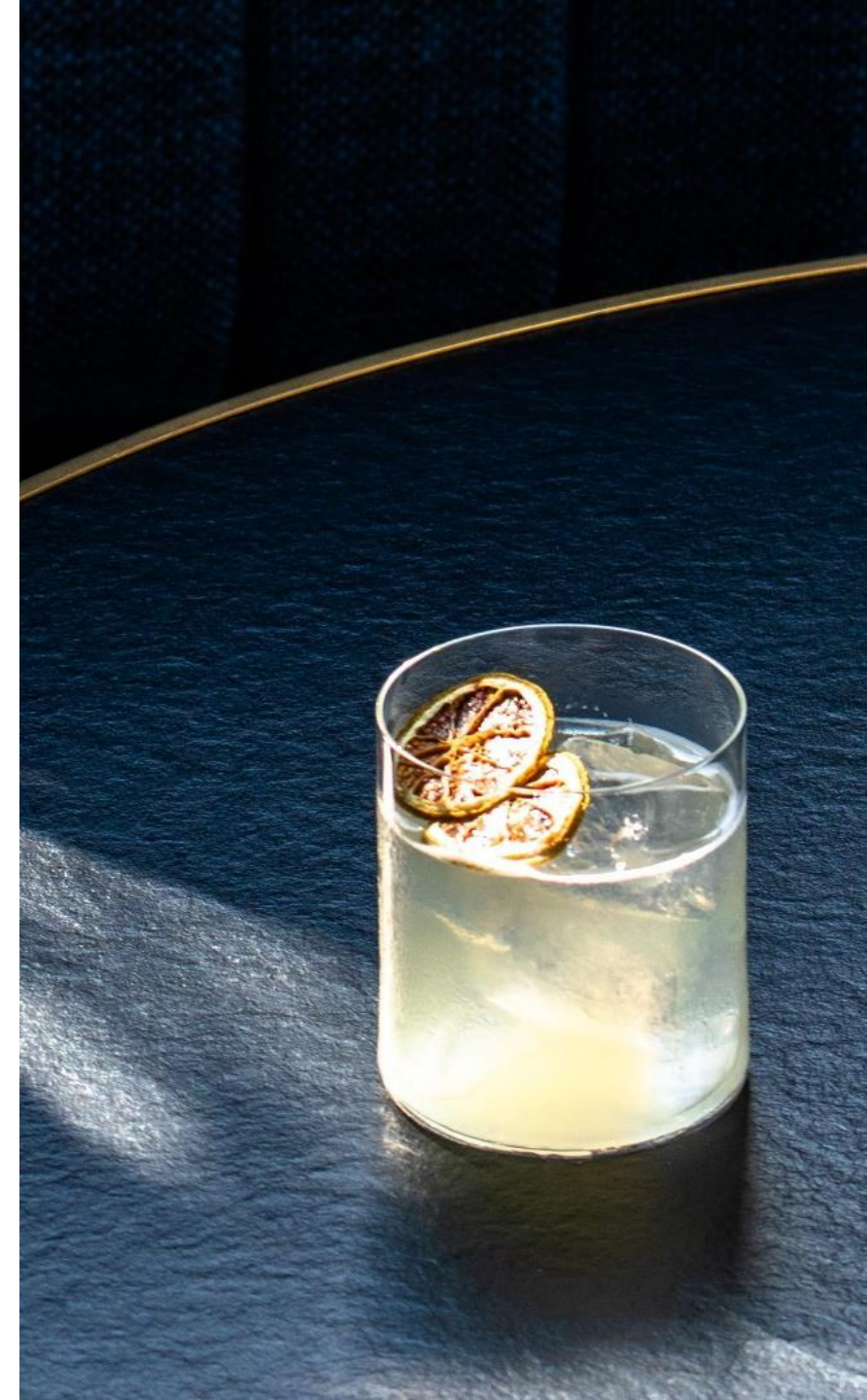
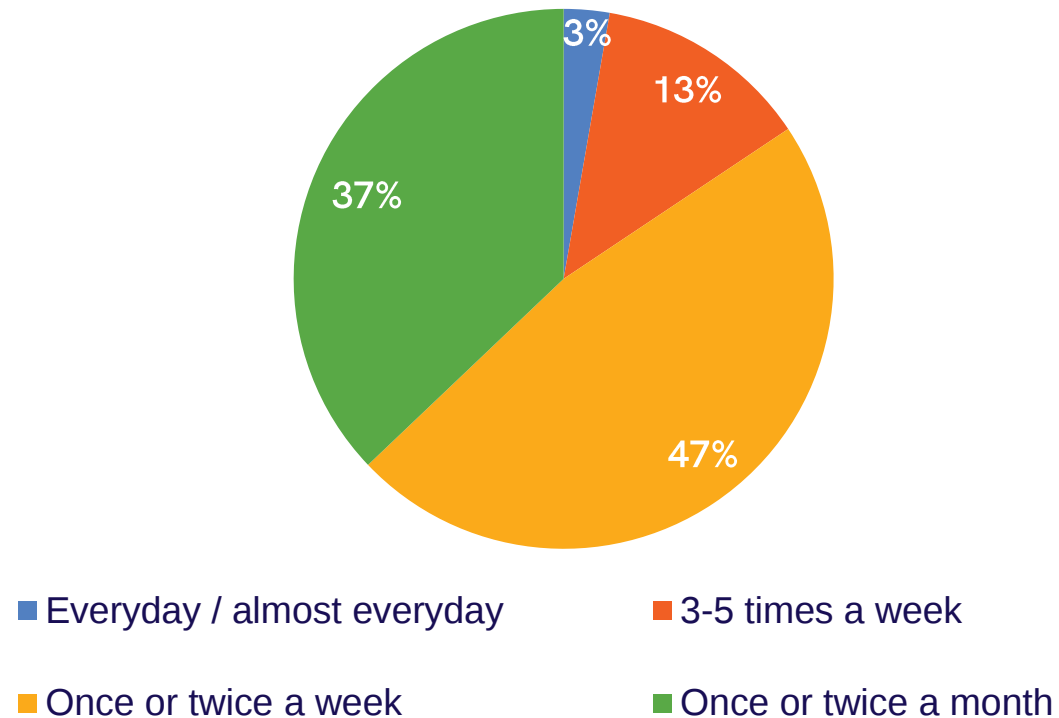
# WHAT TIMES OF DAY HAVE YOU BEEN VISITING BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

Time of day consumers have visited the On Premise in the past month



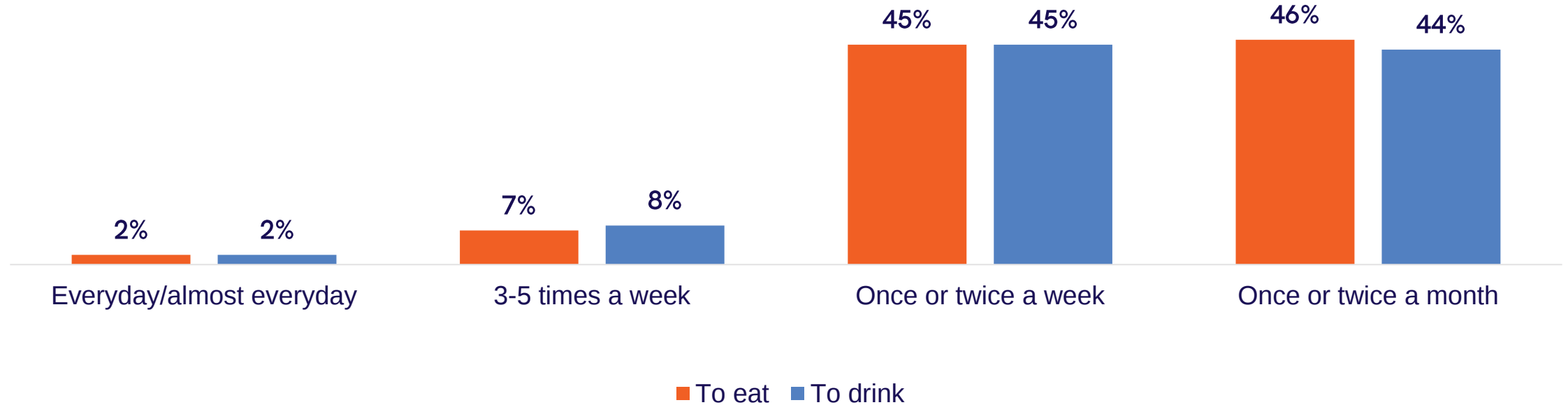
# HOW OFTEN HAVE YOU VISITED BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

*Frequency consumers have visited On Premise in the past month*



# FREQUENCY VISITING BARS/RESTAURANTS IN THE PAST MONTH, SPLIT BY 'TO EAT' AND 'TO DRINK'

*Asked to those who visited to eat and/or drink within the past month*



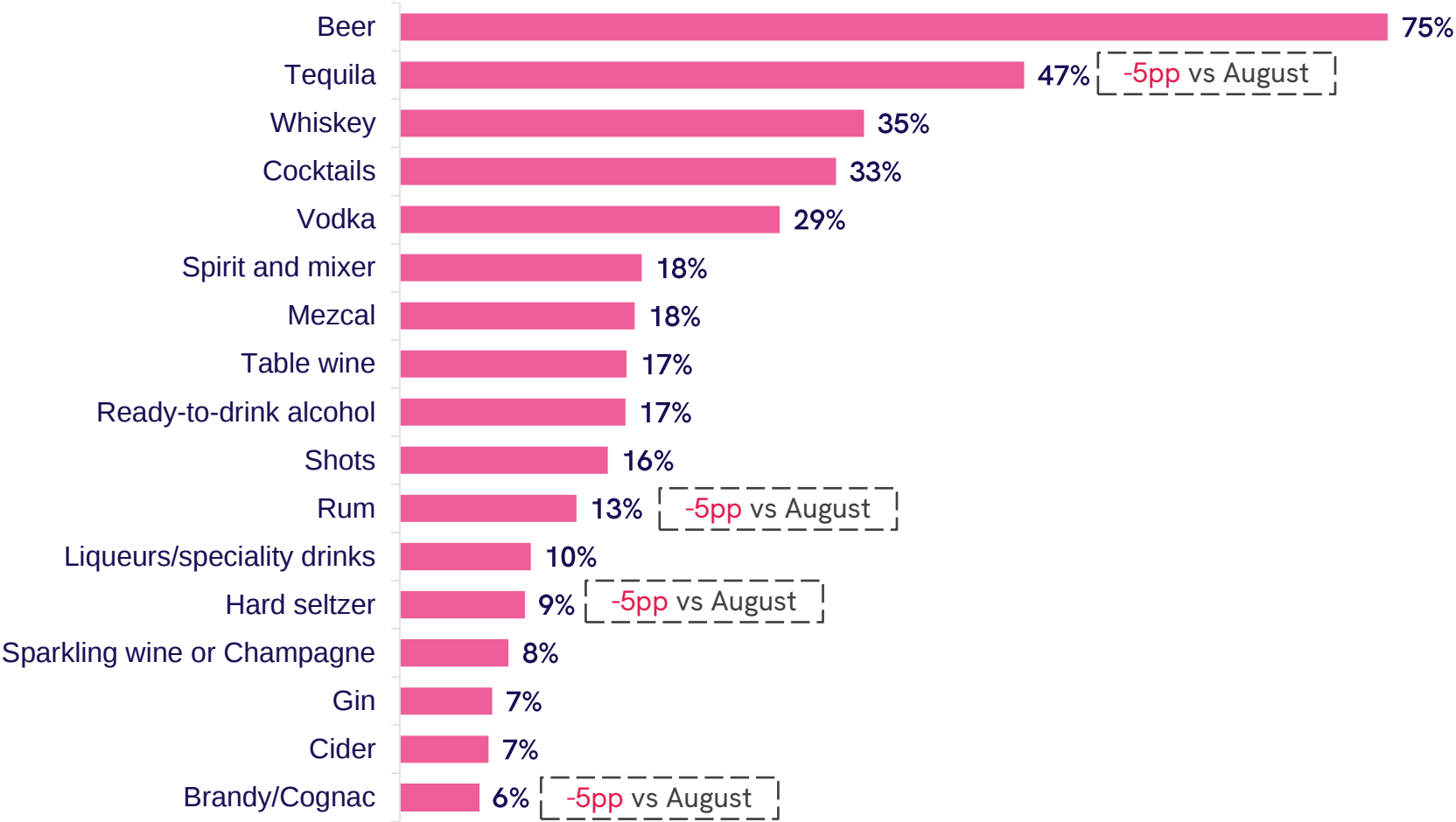


# 2496 MXN

Is the average amount  
consumers have spent on  
eating and drinking out in  
the past month

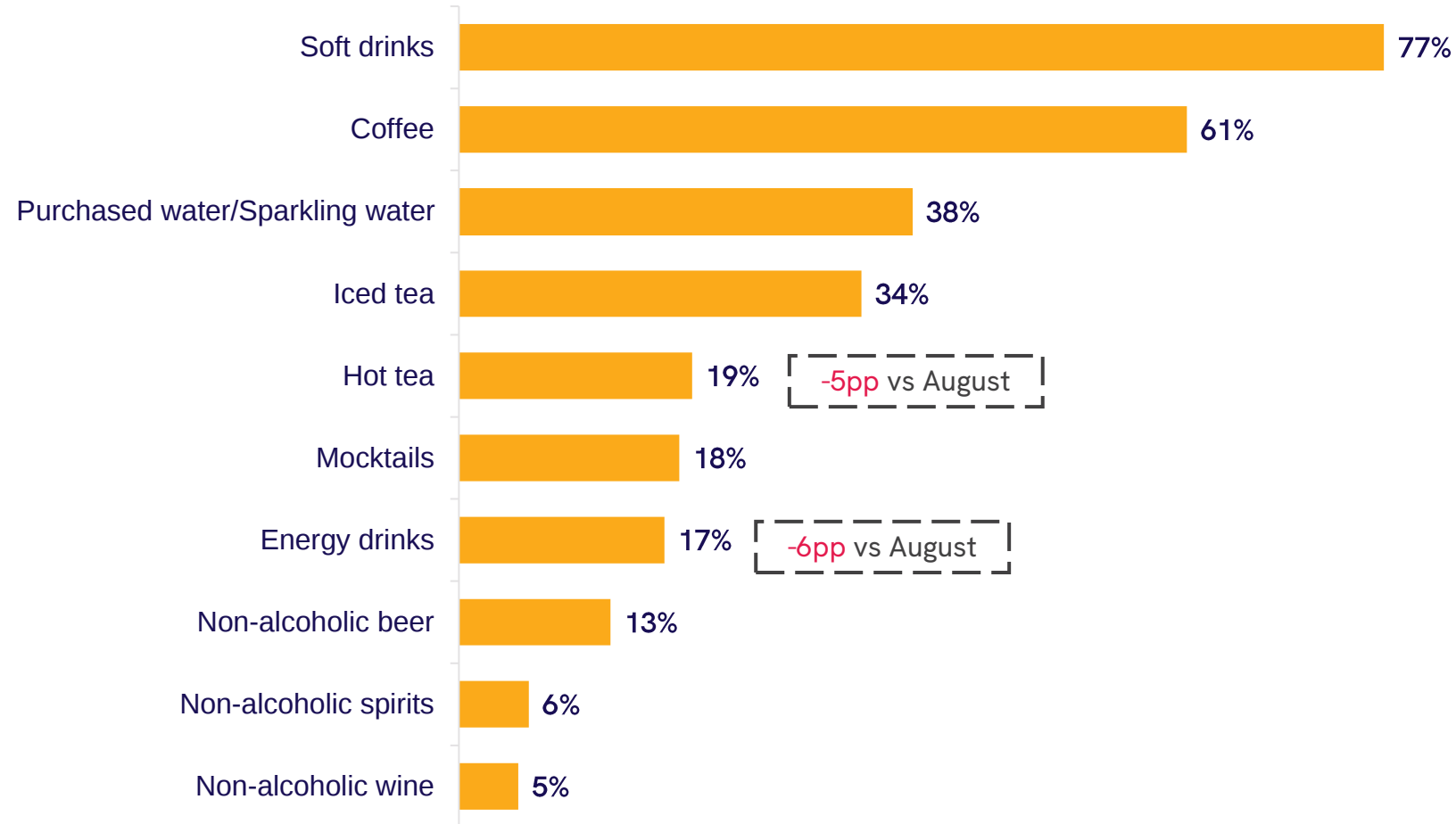
# WHICH OF THE FOLLOWING **ALCOHOLIC DRINKS** HAVE YOU HAD IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?

*Alcoholic drink choice of those who have visited the On Premise in the past month*



# WHICH OF THE FOLLOWING **NON-ALCOHOLIC DRINKS** HAVE YOU HAD IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?

*Non-alcoholic drink choice of those who have visited the On Premise in the past month*



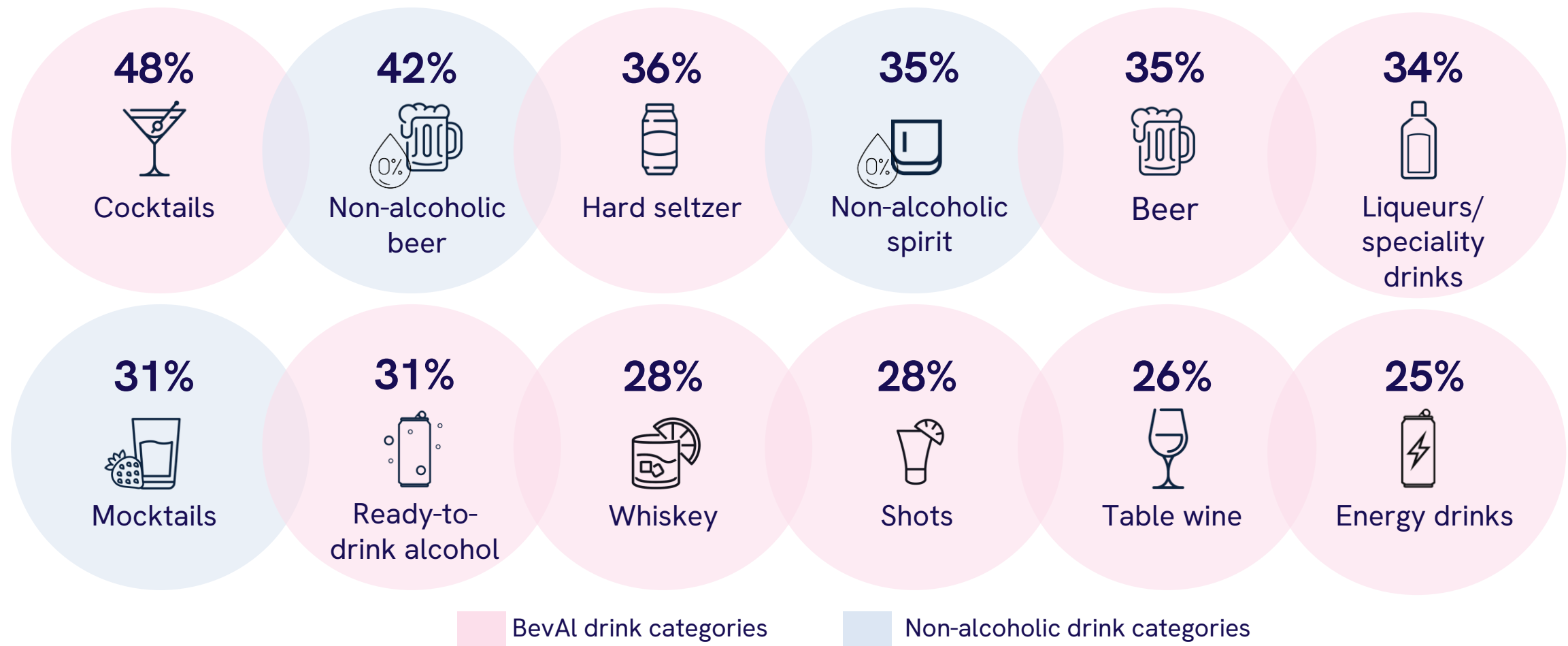
A glass of cocktail with ice, orange, and blueberries on a wooden table.

# 56%

of consumers have tried a new  
drink when eating or drinking out  
over the past month

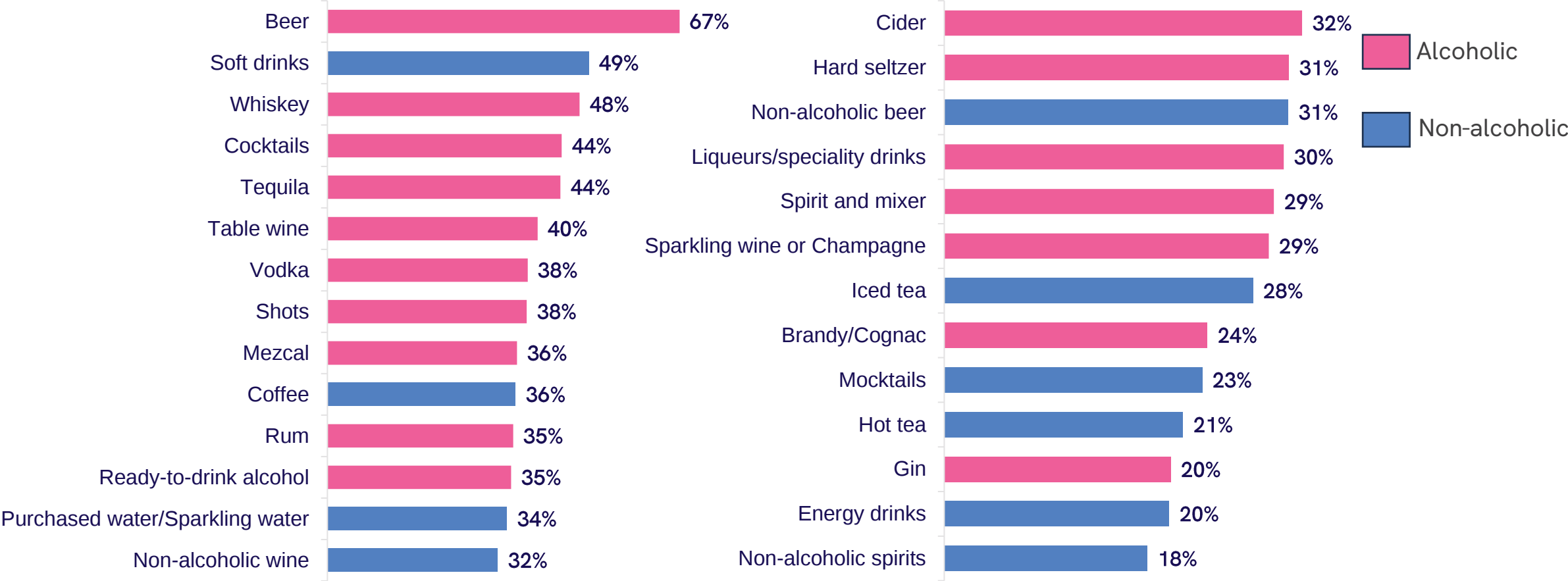
# WHICH OF THE FOLLOWING CATEGORIES WAS THE NEW DRINK THAT YOU TRIED?

Top new drink categories consumers have tried in the past month  
Shown to individual drink category consumed in the past month



THINKING ABOUT YOUR MOST RECENT VISIT TO A BAR, RESTAURANT OR SIMILAR VENUE, WHICH OF THE FOLLOWING CATEGORIES DID YOU DRINK?

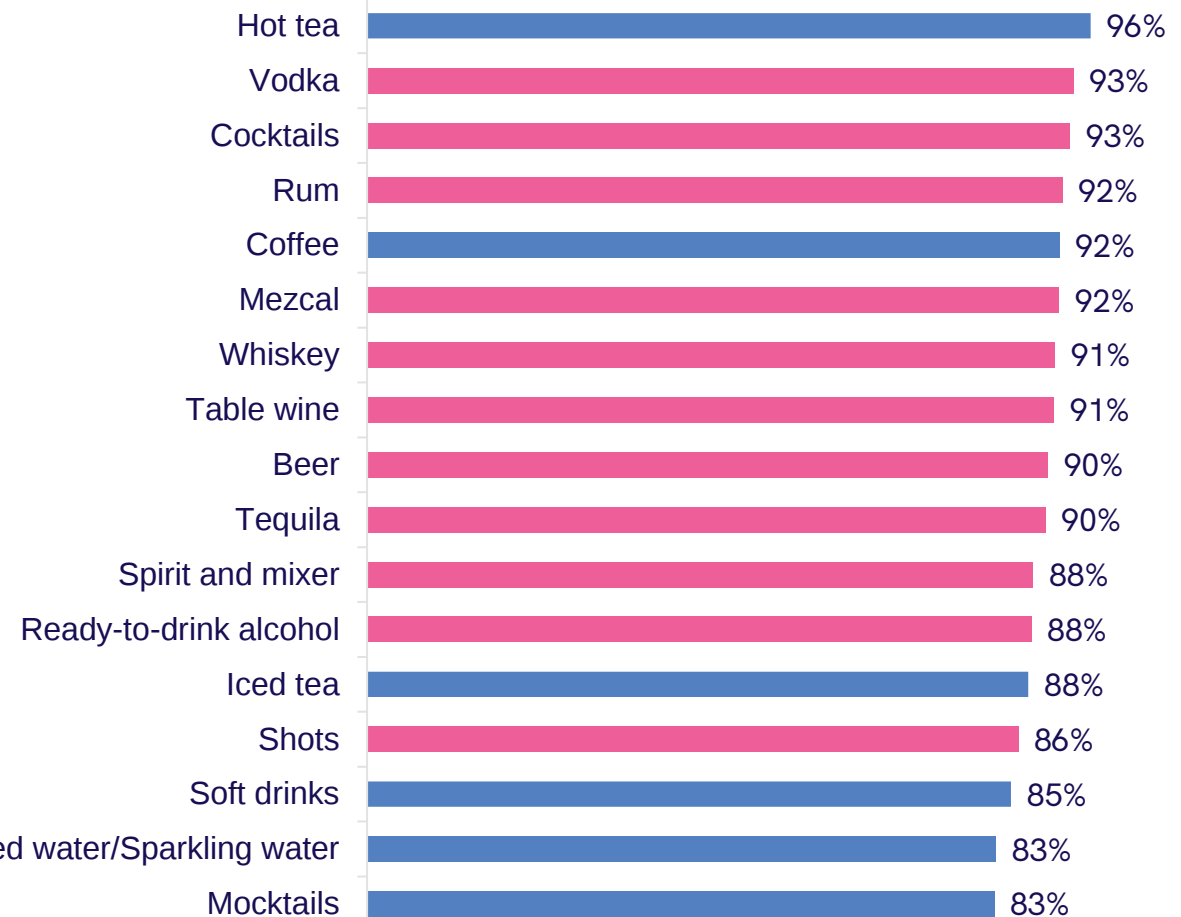
Drink categories consumed on most recent visit  
Shown to individual drink category consumed in the past month



# HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING ITS VALUE FOR MONEY?

Shown to individual drink category consumer on latest visit

% very satisfied / satisfied with **value for money**



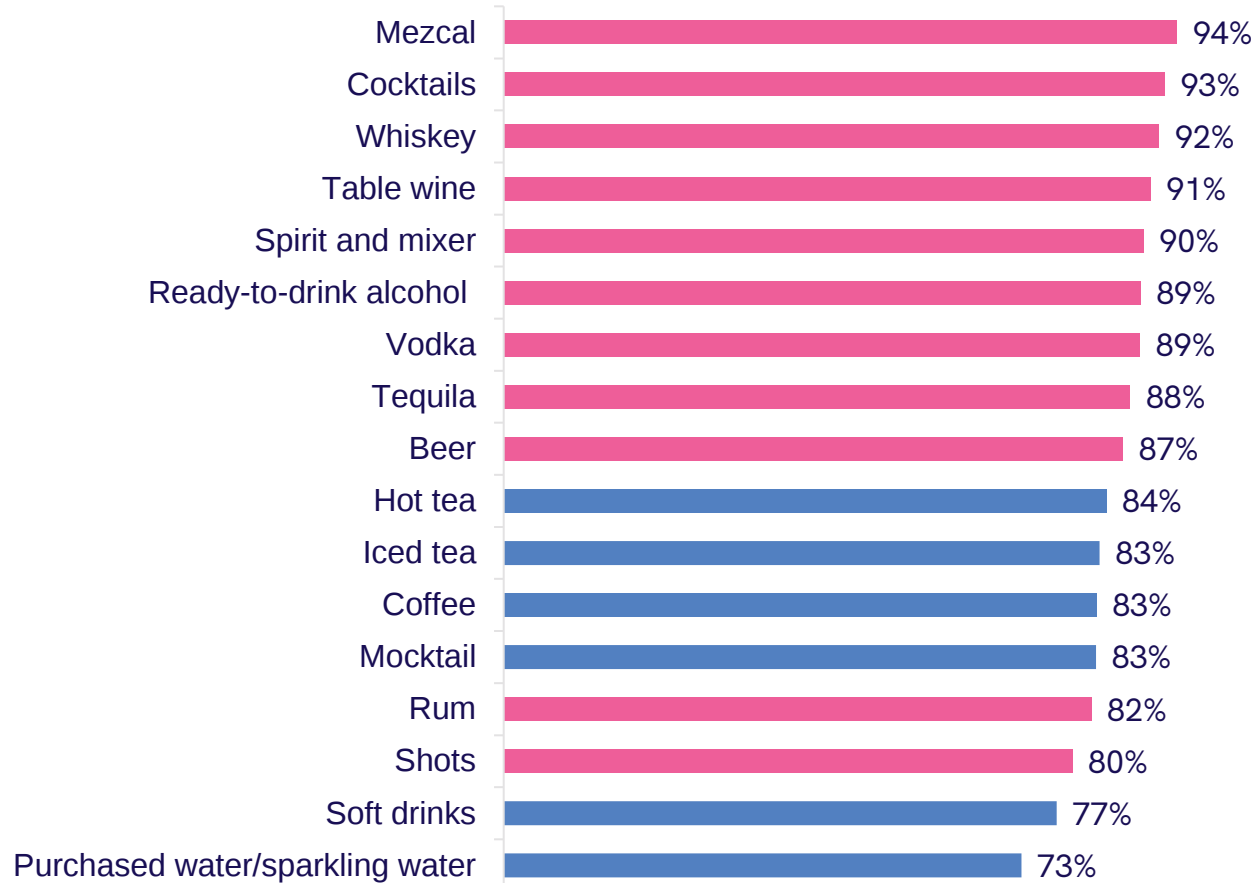
\*BevAl drink categories

\*Non-alcoholic drink categories

# HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING HOW EXCITING IT WAS?

Shown to individual drink category consumed on latest visit

% very satisfied / satisfied with **how exciting the drink was**



\*BevAl drink categories

\*Non-alcoholic drink categories

SOURCE: CGA by NIQ MEXICO ON PREMISE PULSE REPORT - SEPTEMBER 2024 - SAMPLE (50 - 566)

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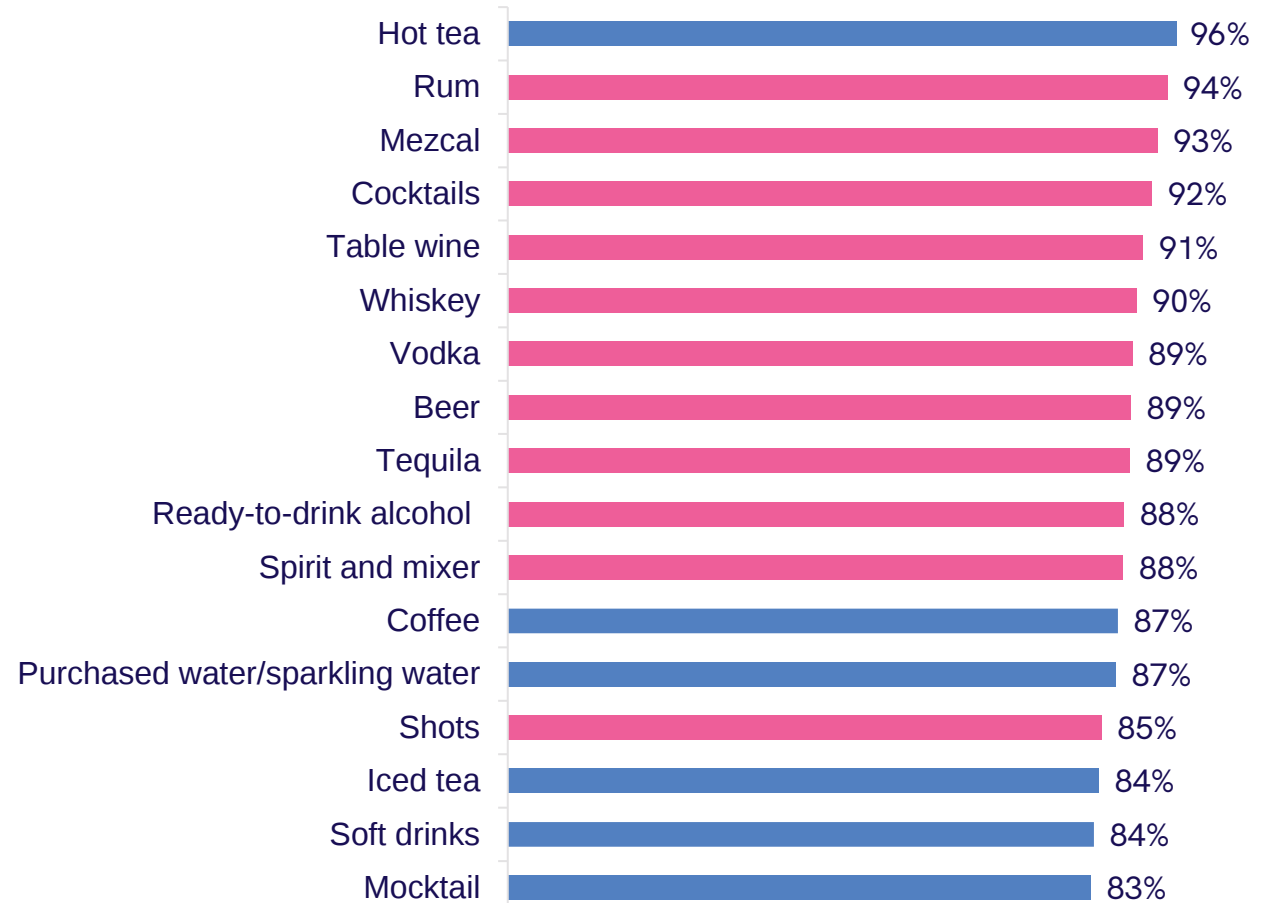


\*BevAl drink categories  
\*Non-alcoholic drink categories

# HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING ITS QUALITY OF SERVE?

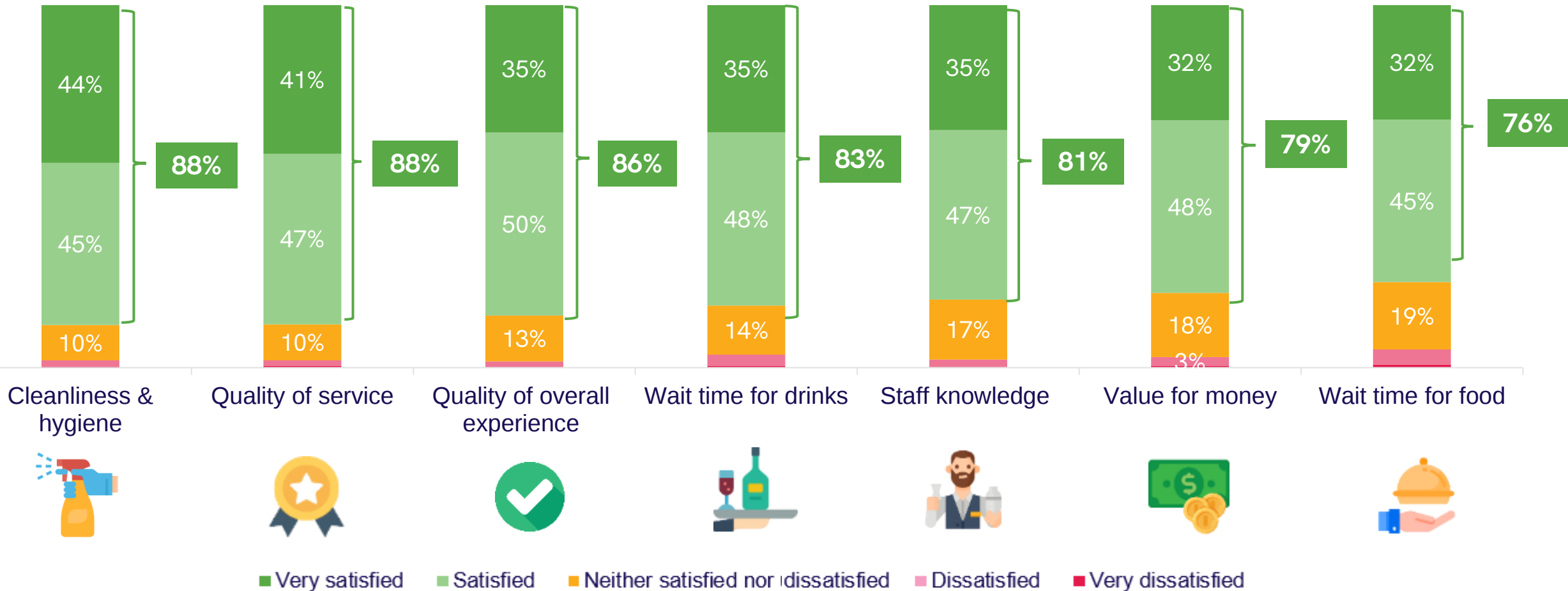
Shown to individual drink category consumed on latest visit

% very satisfied / satisfied with **the overall quality of serve**



# HOW SATISFIED WERE YOU WITH EACH OF THE FOLLOWING AREAS ON YOUR MOST RECENT VISIT TO A BAR, RESTAURANT OR SIMILAR VENUE?

*Proportion of consumers very satisfied/satisfied with...*





# HOW OFTEN DO YOU PLAN TO VISIT BARS, RESTAURANTS OR SIMILAR VENUES IN THE NEXT MONTH?

*Planned On Premise visitation over the next month*



Much more frequently/more frequently than this month

35%



As frequently as this month

45%

+5pp vs August

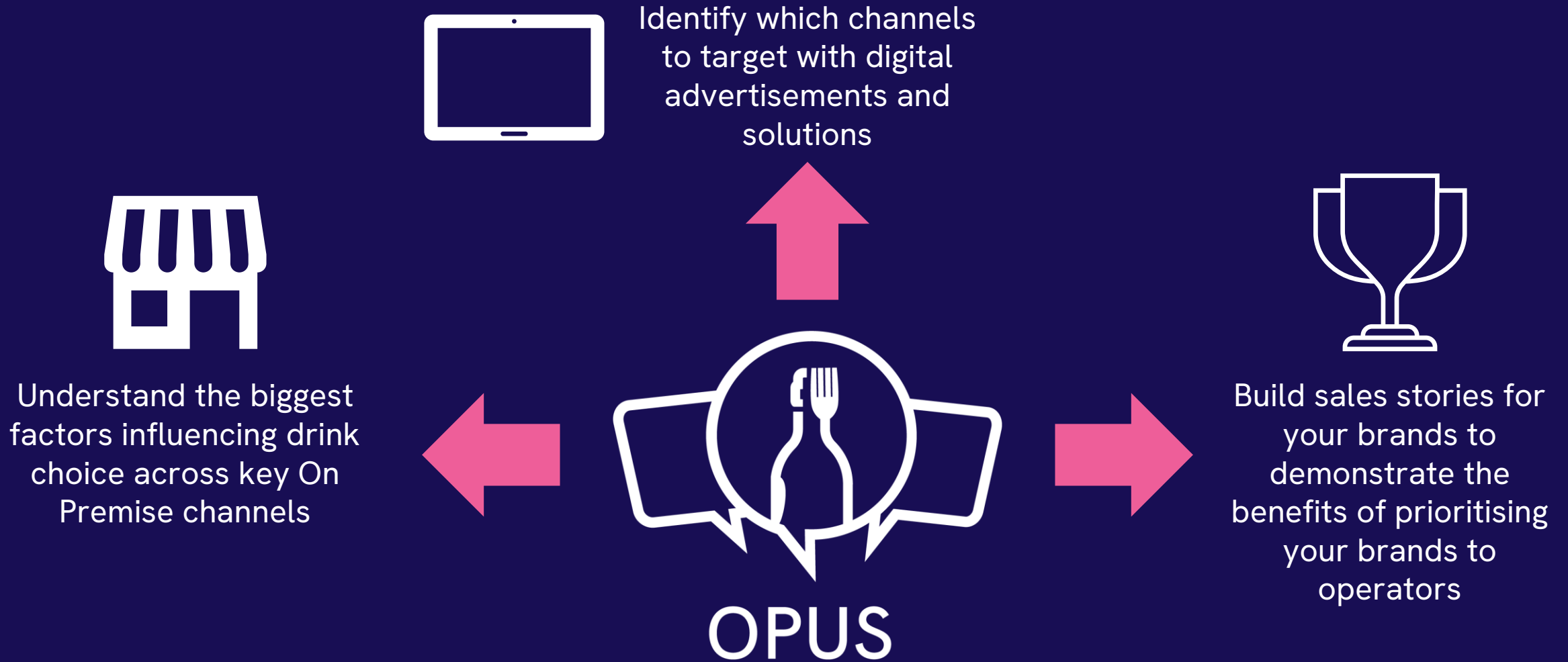


Much less/less frequently than this month

21%

-6pp vs August

# Optimise your On Premise channel strategy with CGA's On Premise User Survey



# Global Bartender Reports

*Market-specific insights based on a robust sample of 150 bartenders per country*

- Understand the market nuances and the needs of hospitality professionals at a market level by purchasing country-specific Bartender Report
- Market-level reports are available for all countries included in the study and provide a rich insight into how to win with hospitality professionals, how to drive advocacy and the trends impacting specific countries

## What you will receive

- *An in-depth report providing market level findings and recommendations allowing you to build relationships with this crucial audience, delivered in local language*
- *A virtual presentation of findings, delivered by CGA experts*

## Investment

|                                                                                                            |                                                                                                          |                                                                                                         |
|------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
|  UK - \$17,748          |  USA - \$22,185       |  France - \$16,417 |
|  South Korea - \$17,526 |  Italy - \$16,417     |  Mexico - \$19,523 |
|  Germany - \$19,967     |  Australia - \$17,525 |  Canada - \$17,748 |
|  Spain - \$16,417       |                                                                                                          |                                                                                                         |



# Want to know more about how global trends are currently impacting the Mexican On Premise?



## Global REACH Presentations

At CGA, May marks the release of our annual Global On Premise insights report – REACH.

Alongside the usual look at On Premise visitation, trending categories and venue choice factors, this year's report looks the topical issues affecting the industry such as sustainability, the cost of living crisis, social media and advocacy, education and others.

If you'd like to enquire about a presentation for you and your team, please get in touch via the contact information on the next slide.



## Regional REACH reports

Following on from our annual Global REACH report will be our regional REACH reports aiming to explore more closely the nuances by market dependent on global location.

For the French On Premise this will be in the form of a dedicated European report.

Get in touch to discuss the available options.



## OPUS Core

OPUS Core subscription allows you to delve into the details of consumer behaviour in the On Premise, from granular detail about each channel, occasion and drink category, as well as identifying how key trends are impacting the industry.

Get in touch to find out more.



# Contact Us

To learn more or to speak to a member of the team, please feel free to get in touch:



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