

MEXICO ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ,
October 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, and premiumization.**

During 11th – 12th September 2024, CGA by NIQ surveyed 1,196 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

- In the past month, around 7 in 10 consumers have visited the On Premise for food, while 46% have visited for a drink.
- 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 most popular followed by 3 in 5 visiting on Fridays.
- Almost two thirds of On Premise monthly visitors have visited venues on at least a weekly basis. Those visiting for drink-led occasions are more likely to go out weekly, whereas those going on food-led trips are slightly more likely to visit monthly.
- Beer remains the most favored alcoholic beverage of choice, as over 3 in 4 have consumed the category in the On Premise over the past month. Tequila is the top spirit choice and has had an increase in consumption since last wave. Soft drinks are the top non-alcoholic option, with over 3 in 4 consuming the category, this is followed by coffee.
- Almost 3 in 5 consumers have tried a new drink in the On Premise in the past month, with beer being the most popular choice for experimentation and cocktails coming in second.
- Looking at satisfaction levels across a consumer's most recent visit, they express high satisfaction with the value for money, the excitement of the drink, and the overall quality of the serve across all drink categories they have had.
- Satisfaction levels are also consistently high across different elements of their last visit to venues, with the vast majority being satisfied with the quality of service received, in particular.
- For future visitation, over a third plan to visit more frequently than they did in the past month, and almost half plan to visit the same.



Hot topic – Premiumization

- When consumers are looking to purchase a premium drink for a treat, over half are most likely to purchase a drink in a different category than usual whereas around 2 in 5 would choose a more premium/expensive option in their usual drink category.
- Almost 2 in 3 consumers expect a drink to use high-quality ingredients to be considered premium, with over 2 in 5 believe it must be expertly made.
- Of those who would choose a premium drink in the On Premise, premium bars are the top venues consumers would do this in, followed by fine dining restaurants.
- Celebrations are the top occasion for those looking to purchase a premium drink in the On Premise, followed closely by a romantic occasion/date

Key metrics & On Premise visitation



LOOKING BACK



72%

of consumers have been out
to eat in the past month

0pp vs. September 2024

46%

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

-2pp vs. September 2024



SOURCE: CGA by NIQ MEXICO ON PREMISE PULSE REPORT - SEPTEMBER - OCTOBER 2024 - SAMPLE (1,196 - 1,197)

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71%

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

0pp vs. September 2024

47%

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

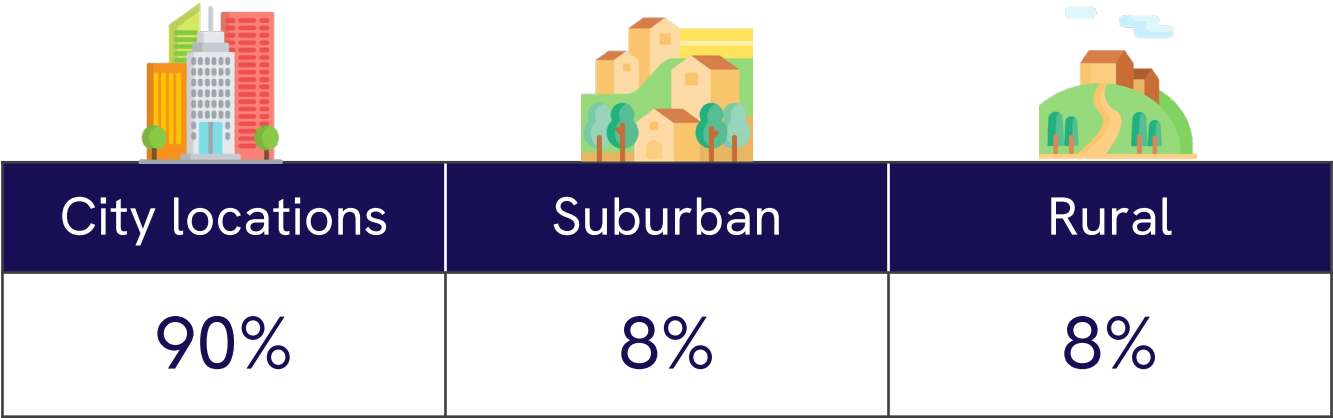
-2pp vs. September 2024



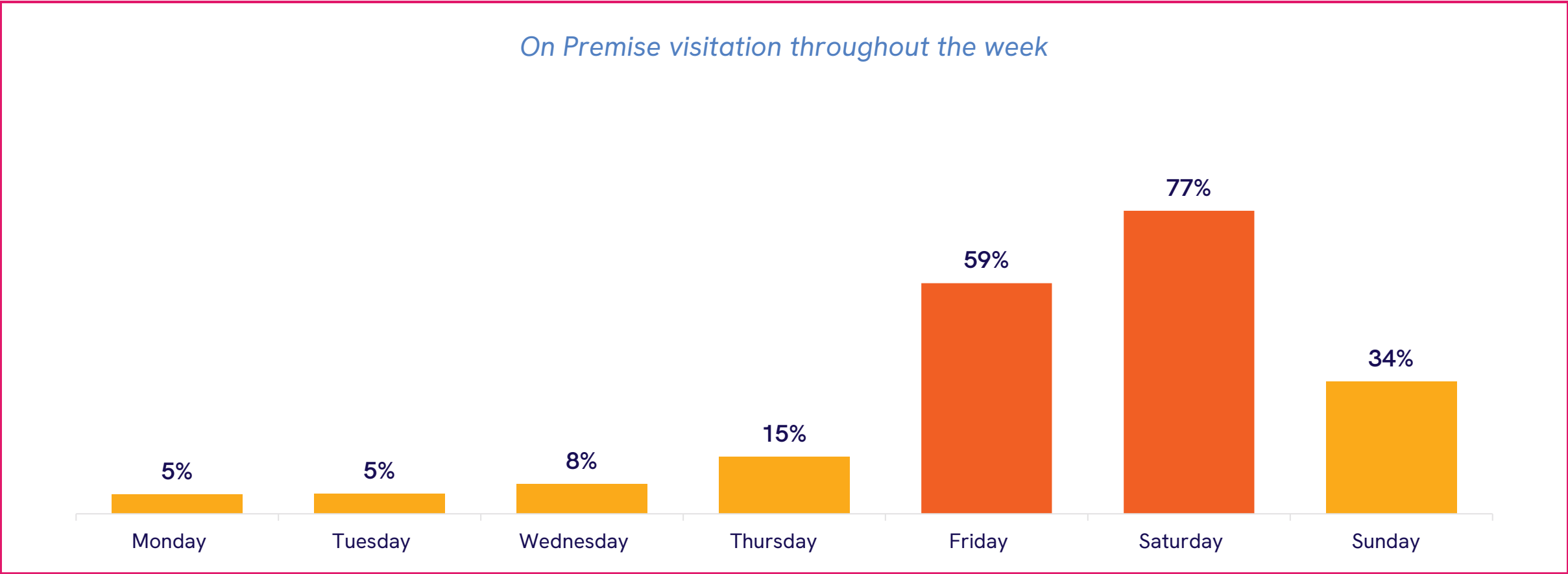


WHICH OF THE FOLLOWING BEST DESCRIBES
THE LOCATIONS OF THE BARS, RESTAURANTS
OR SIMILAR VENUES THAT YOU MOST
TYPICALLY VISIT?

Locations of On Premise venues visited

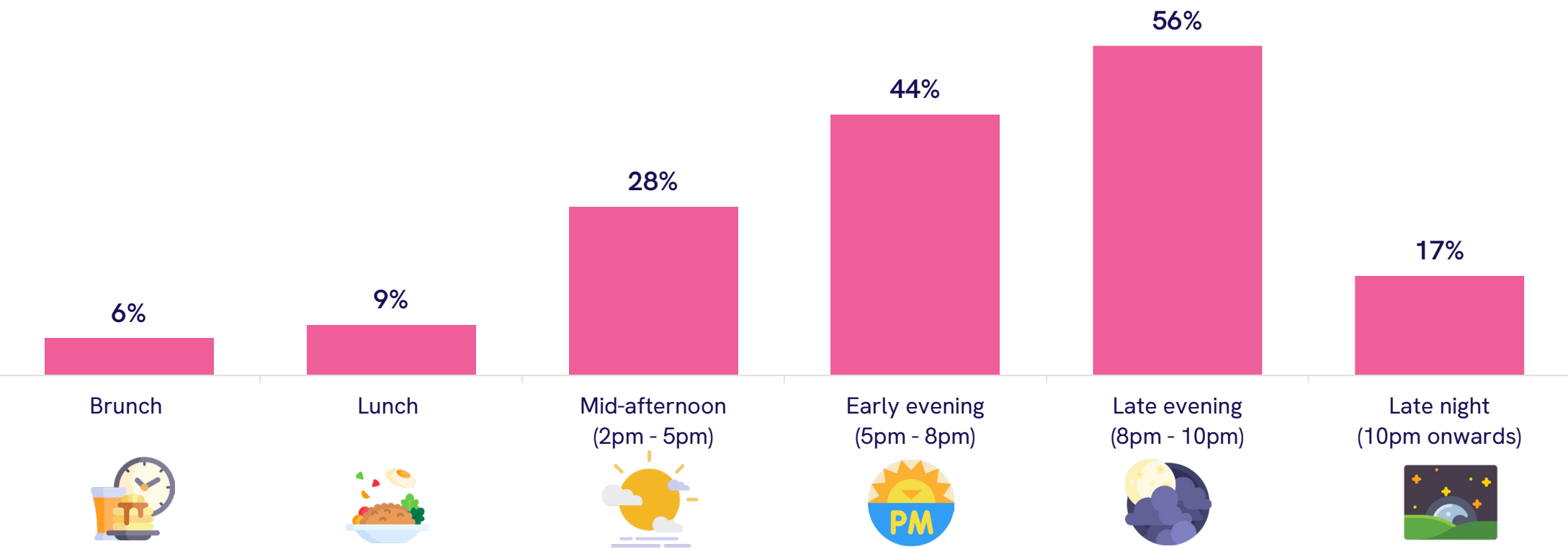


ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE IN THE PAST MONTH?



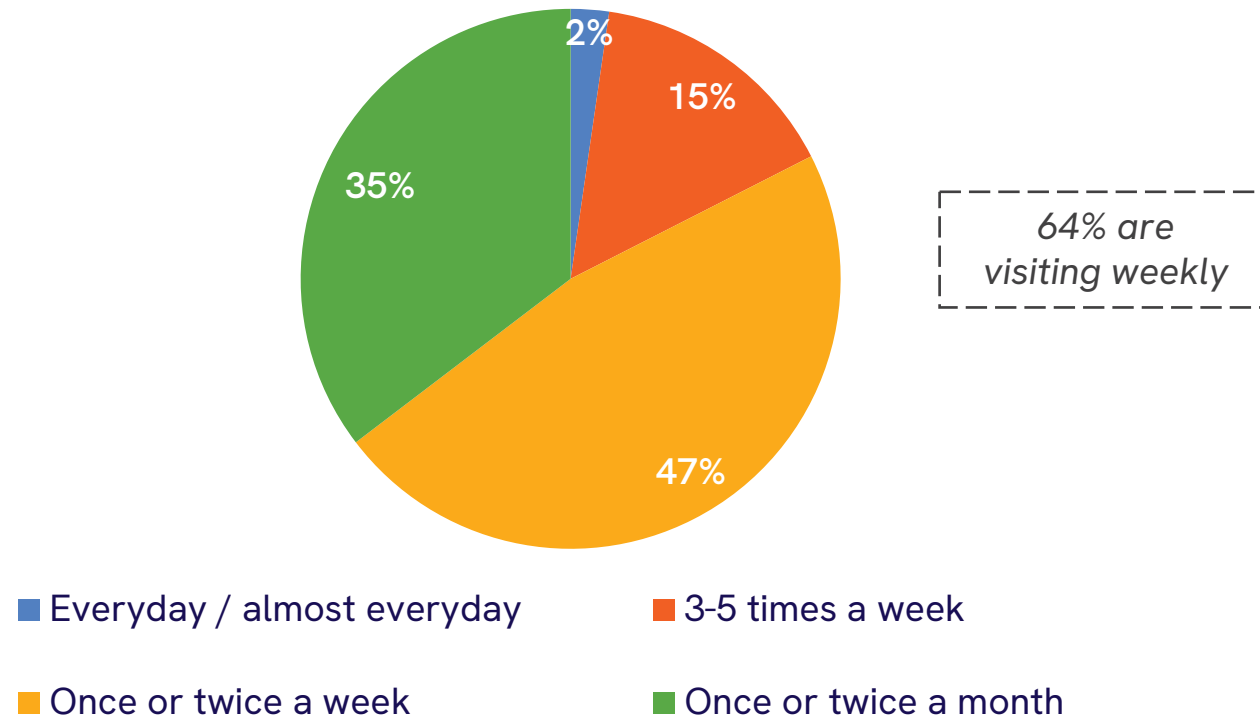
WHAT TIMES OF DAY HAVE YOU BEEN VISITING BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

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



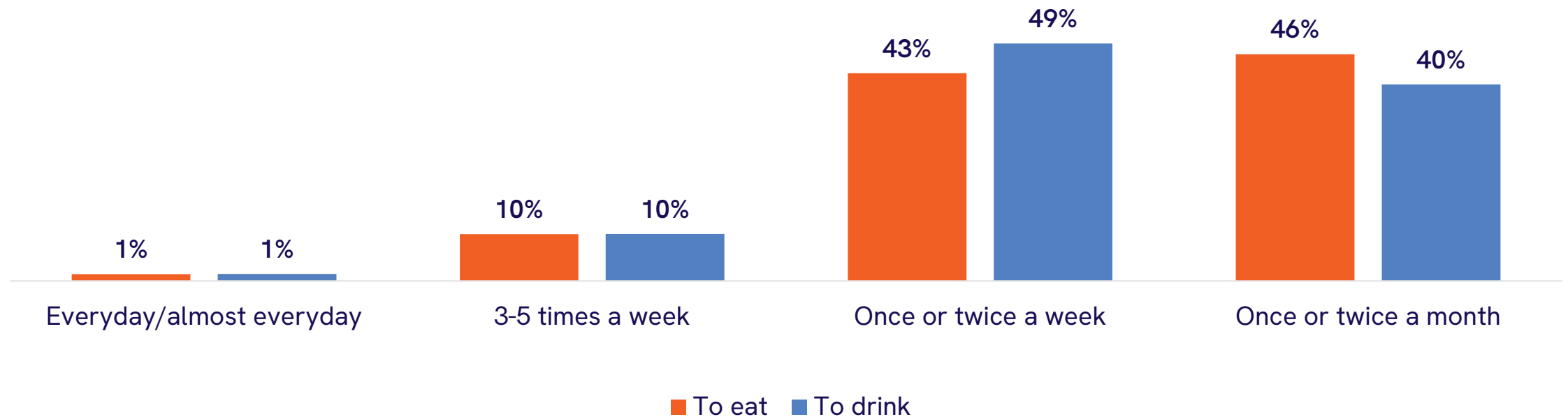
HOW OFTEN HAVE YOU VISITED BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

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



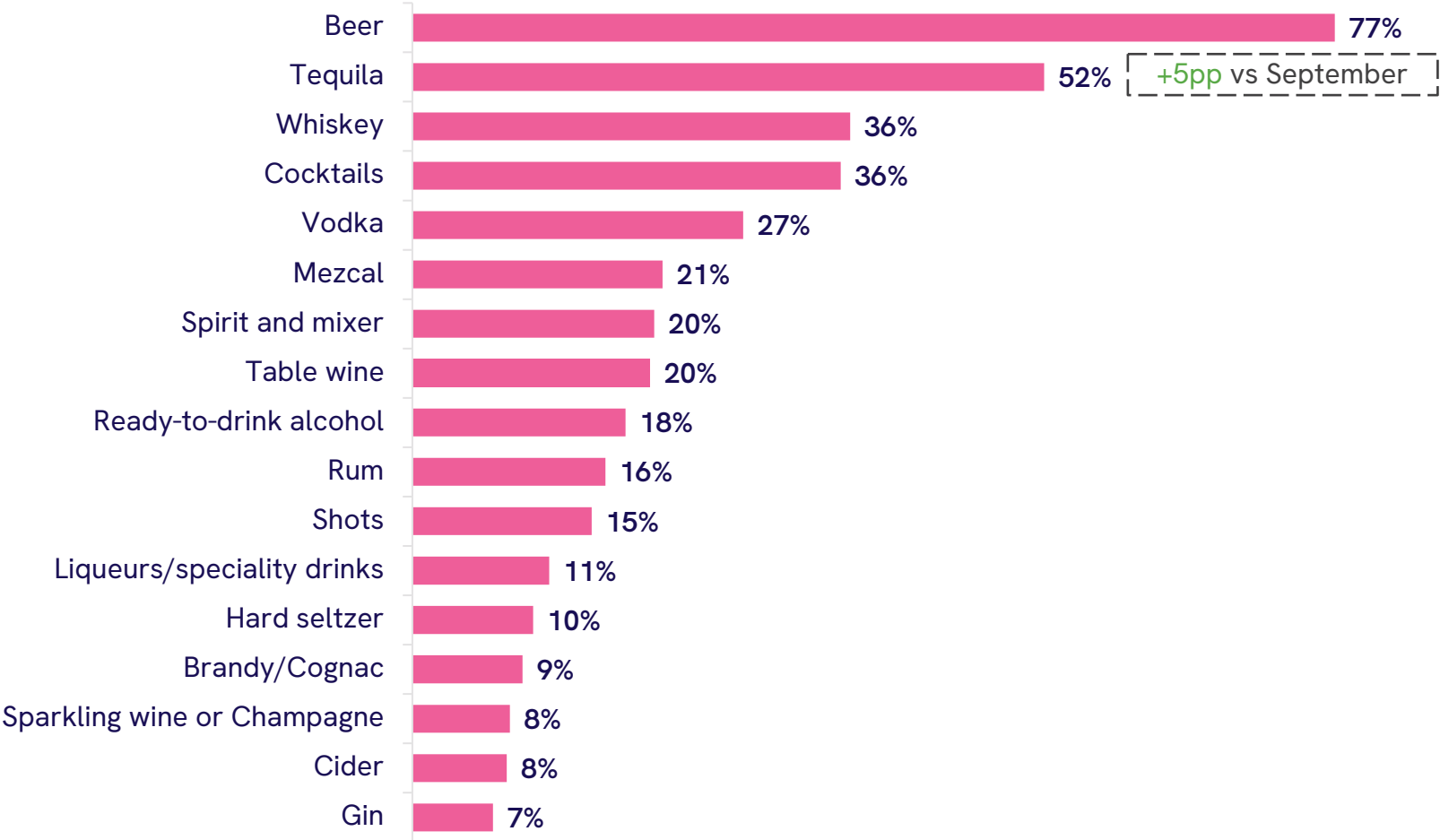


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Is the average amount
consumers have spent on
eating and drinking out in
the past month

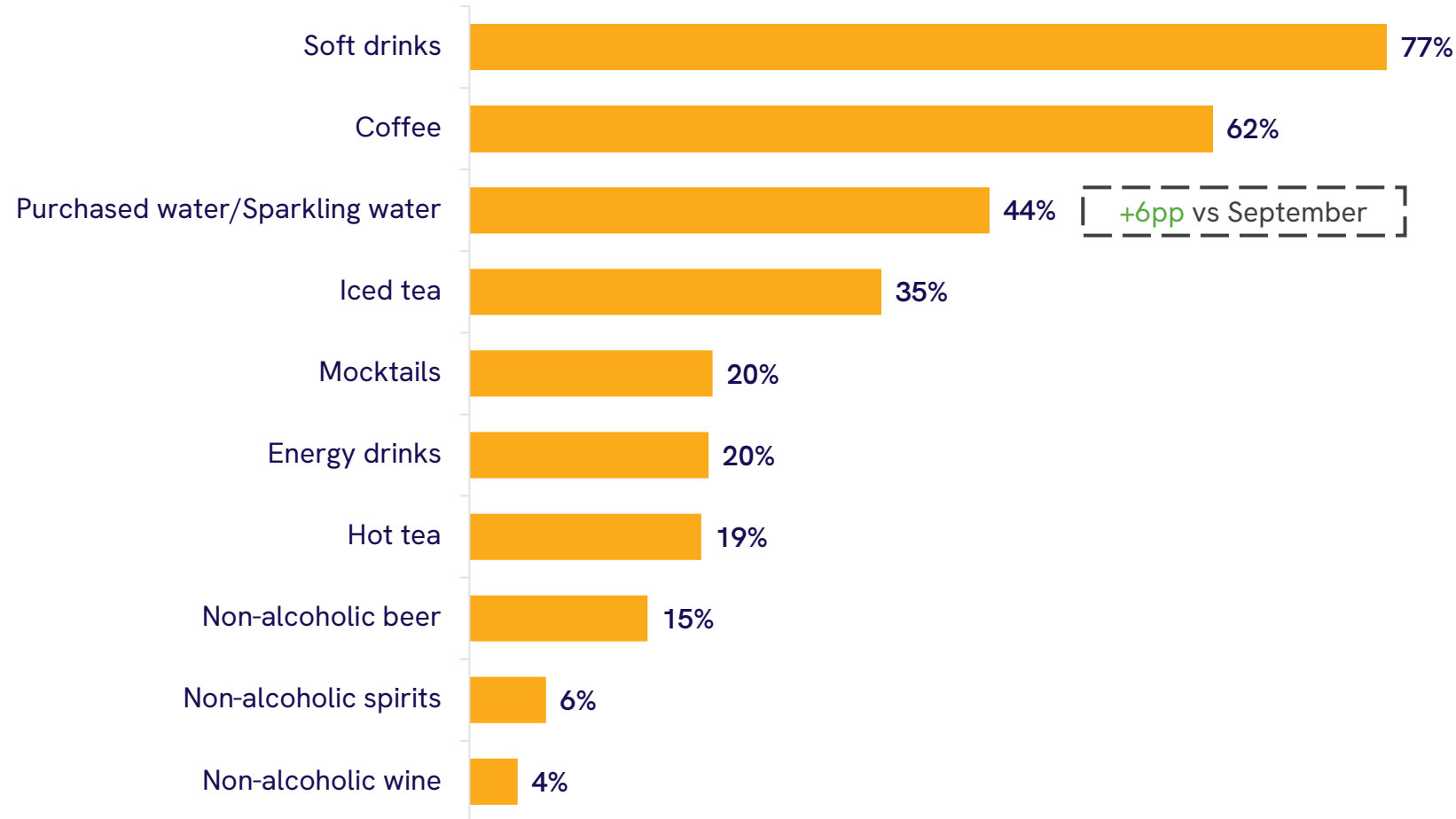
WHICH OF THE FOLLOWING **ALCOHOLIC DRINKS** HAVE YOU HAD IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?

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





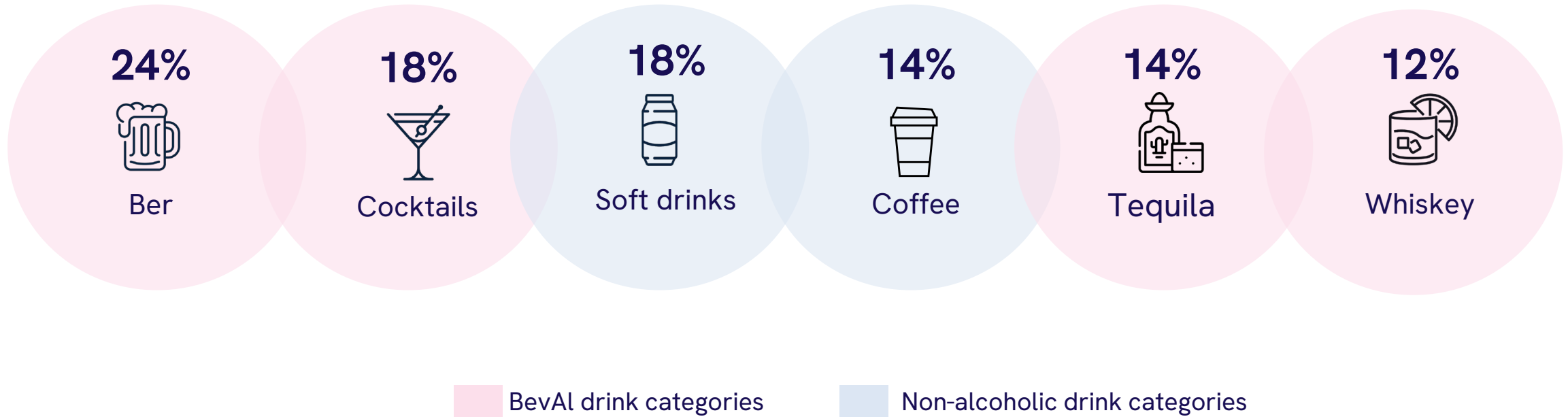
58%

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?

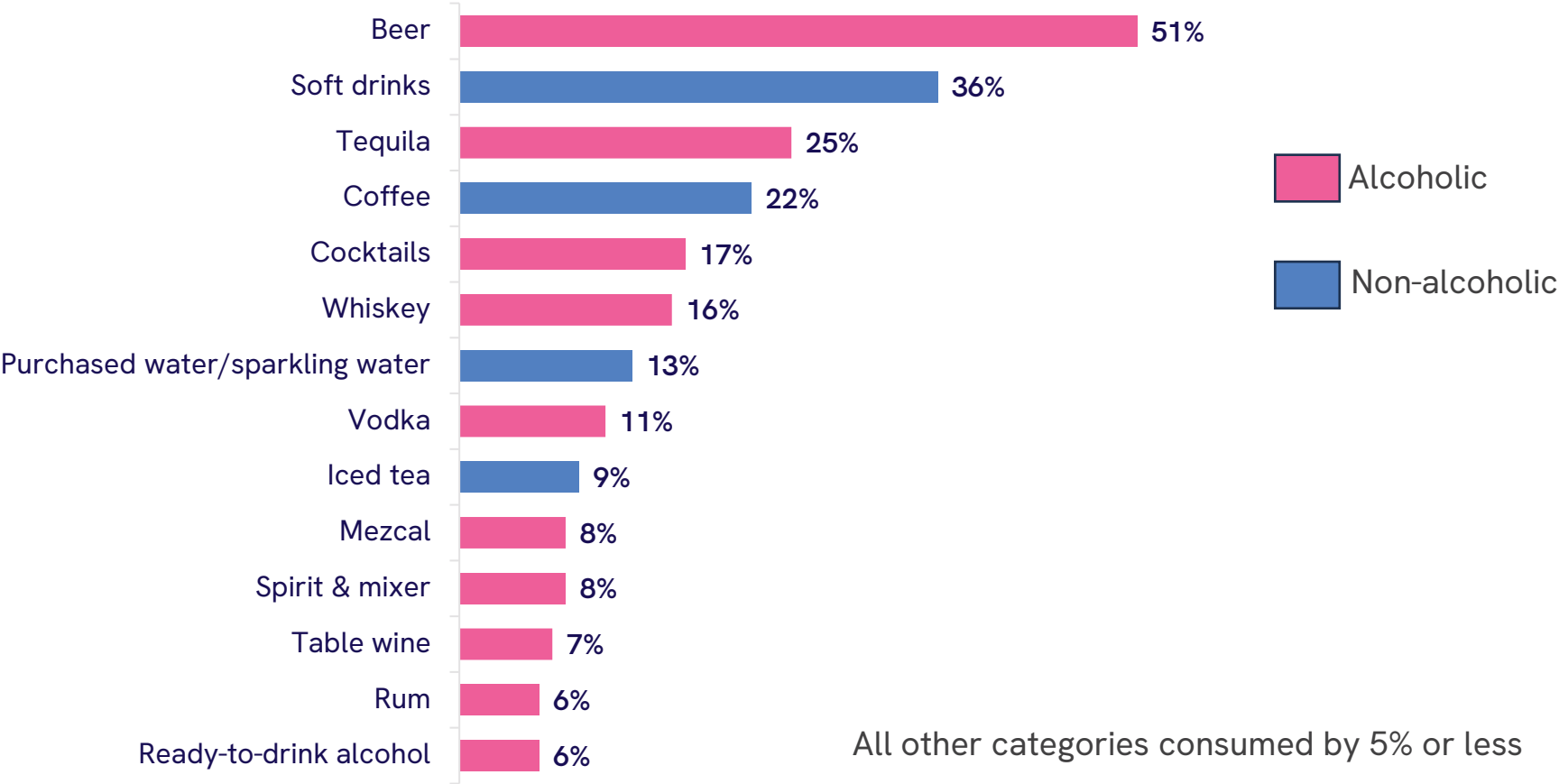
Top new drink categories consumers have tried in the past month

Shown to those who have had a new drink in venues



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

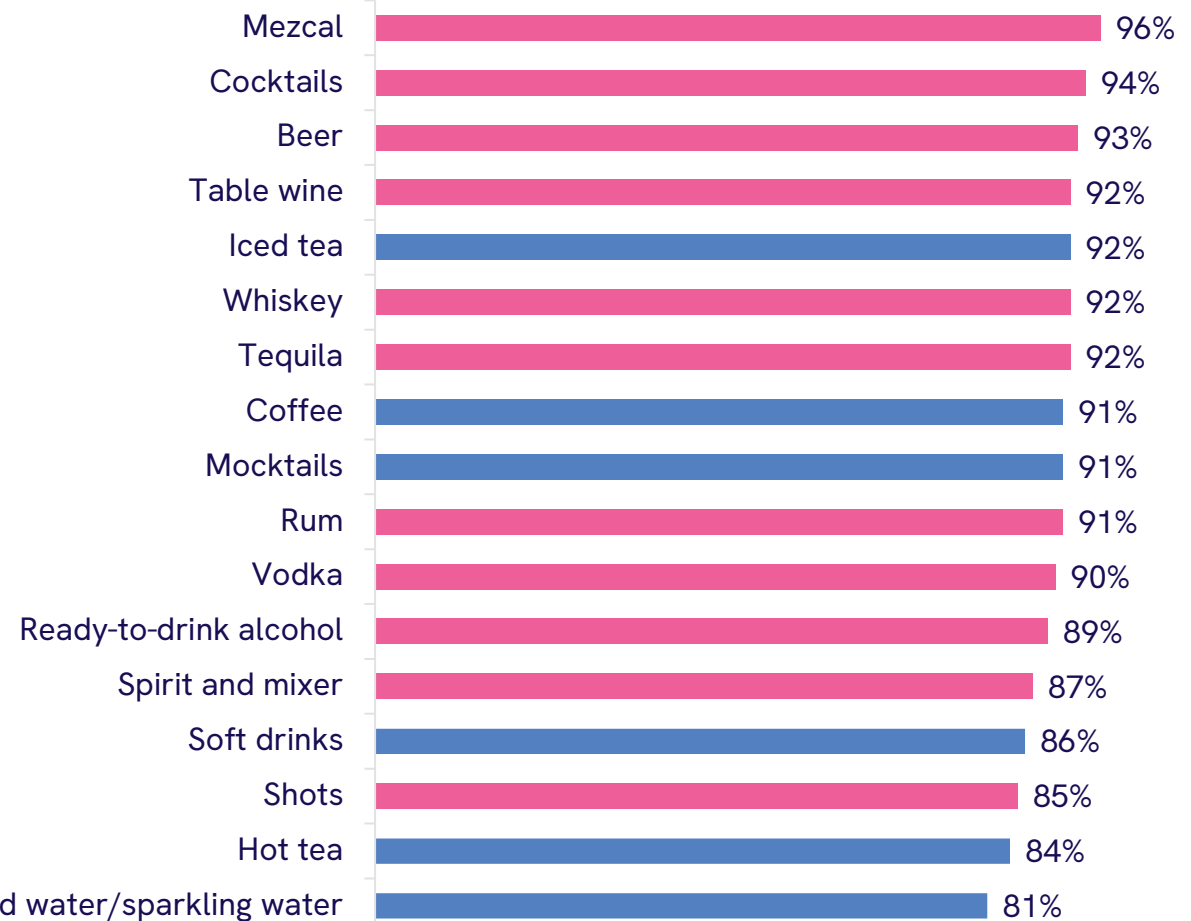
Drink categories consumed on most recent visit



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**



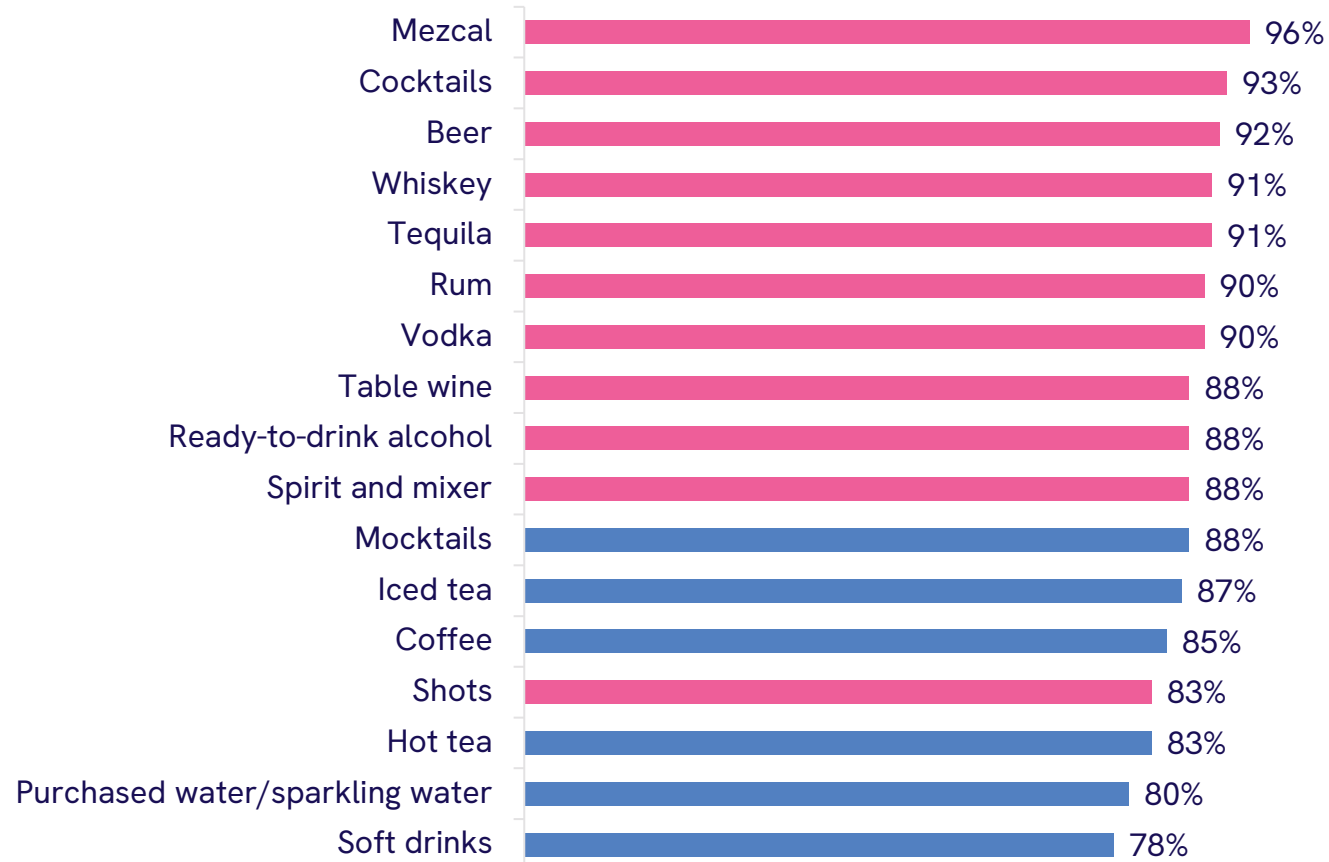
*BevAl drink categories

*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 consumer on latest visit

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



*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 consumer on latest visit

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

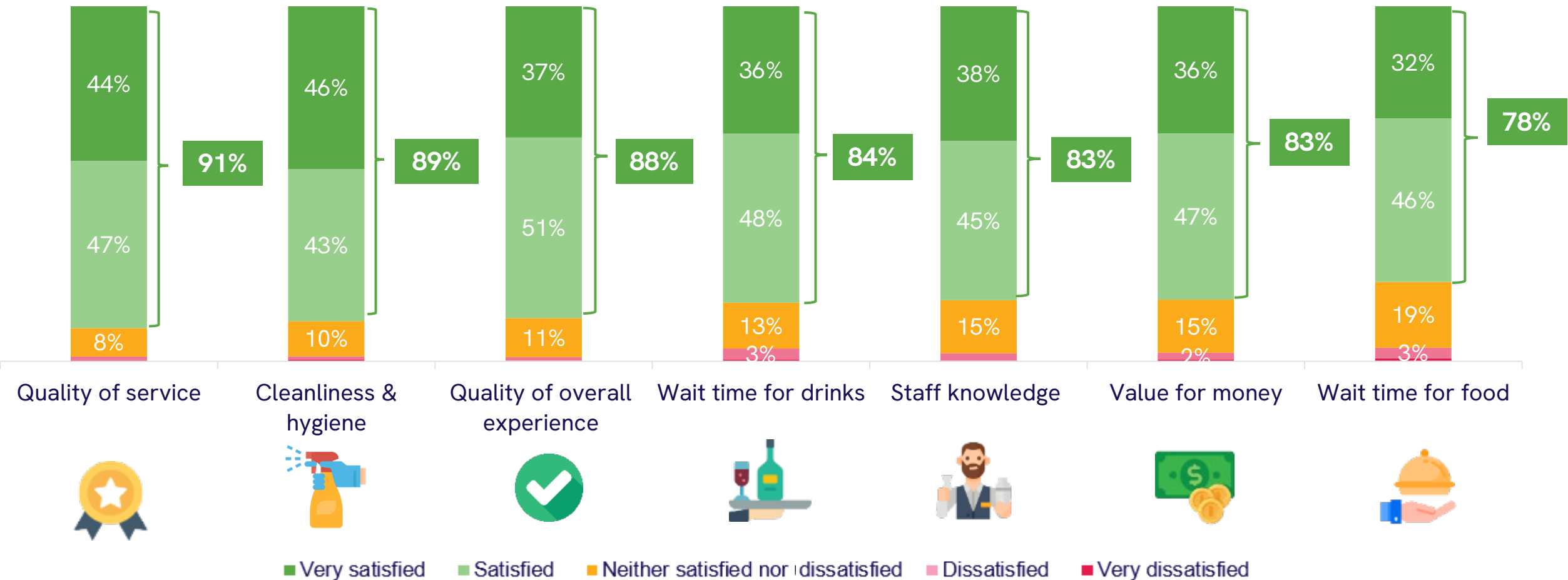


*BevAl drink categories

*Non-alcoholic drink categories

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...





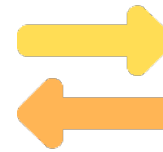
HOW OFTEN DO YOU PLAN TO VISIT BARS, RESTAURANTS OR SIMILAR VENUES IN THE NEXT MONTH?

Planned On Premise visitation over the next month



Much more frequently/more frequently than this month

36%



As frequently as this month

47%



Much less/less frequently than this month

17%

Hot topic – premiumisation



IF YOU ARE LOOKING TO TREAT YOURSELF WITH A PREMIUM DRINK AS OPPOSED TO A VALUE/CHEAP DRINK IN A BAR, RESTAURANT OR SIMILAR VENUE, WHICH OF THE FOLLOWING WOULD YOU TYPICALLY BE MOST LIKELY TO DO?

How consumers would treat themselves in the On Premise



Choose a different drink category to normal

52%



Choose a more expensive/premium brand in the same category

43%

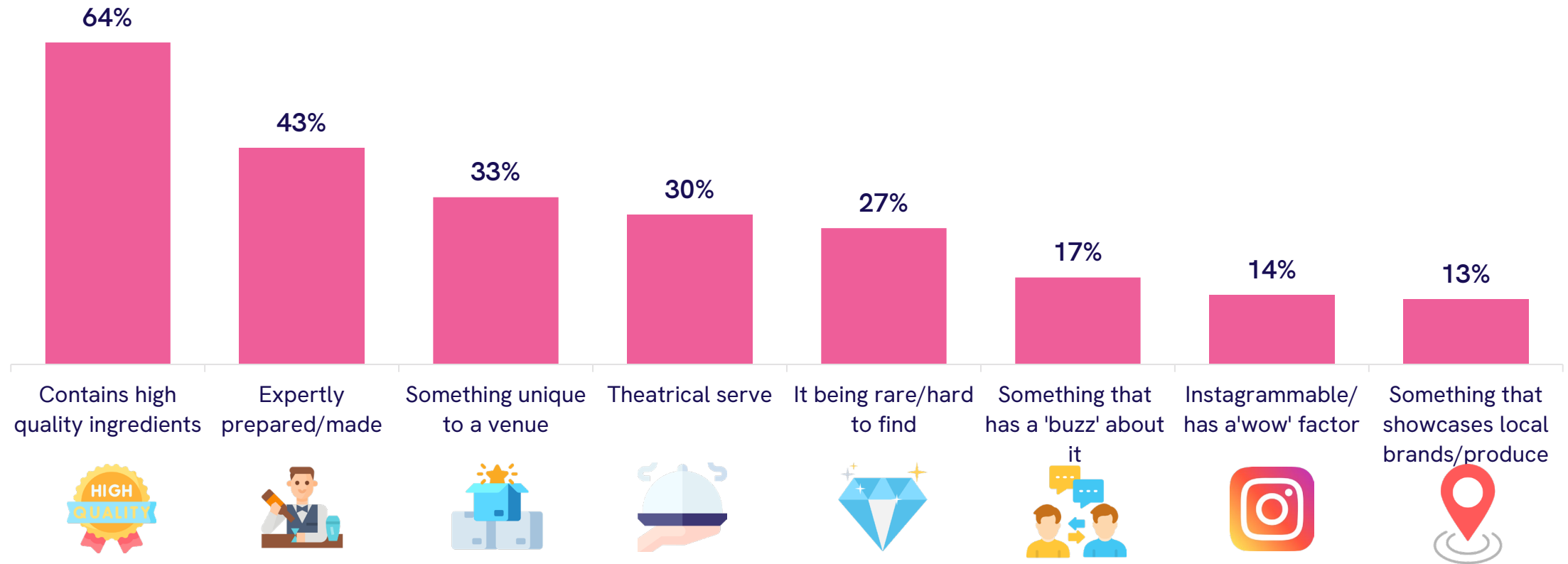


I would never treat myself to a more premium drink

5%

WHICH OF THE FOLLOWING DO YOU EXPECT FOR A DRINK TO BE CONSIDERED “PREMIUM”?

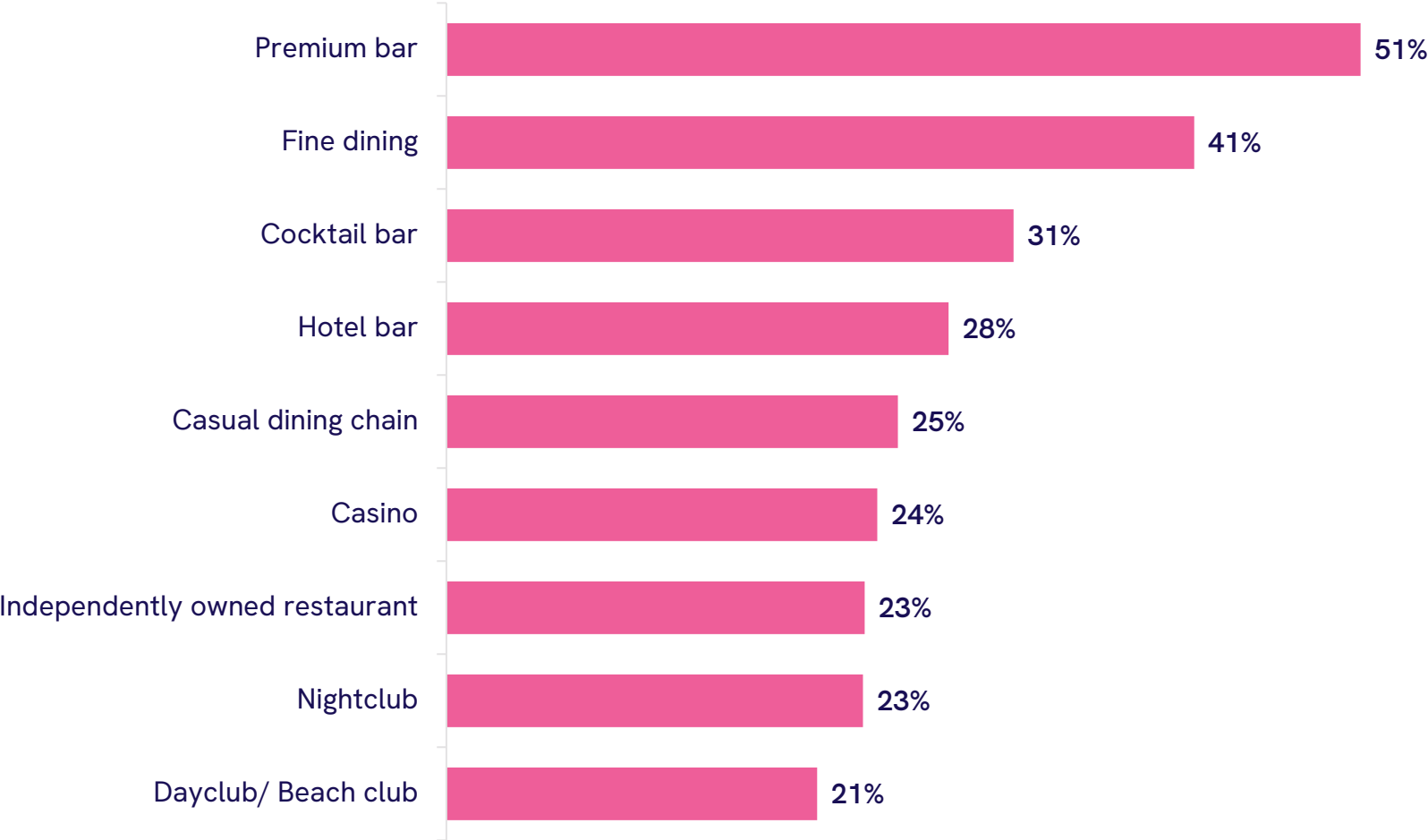
Consumer expectations for premium drinks



IN WHICH OF THE FOLLOWING TYPES OF VENUE WOULD YOU BE MOST LIKELY TO CHOOSE PREMIUM DRINKS?

Asked to those who would choose a premium drink in the On premise

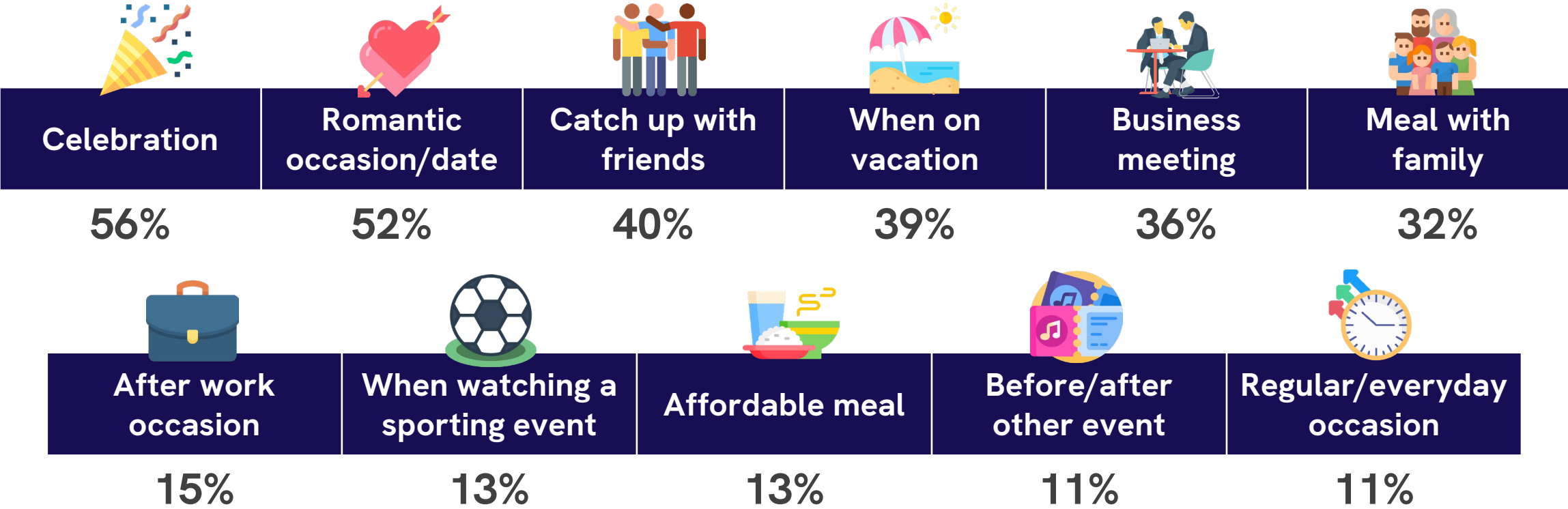
Venues consumers would be most likely to choose a premium drink



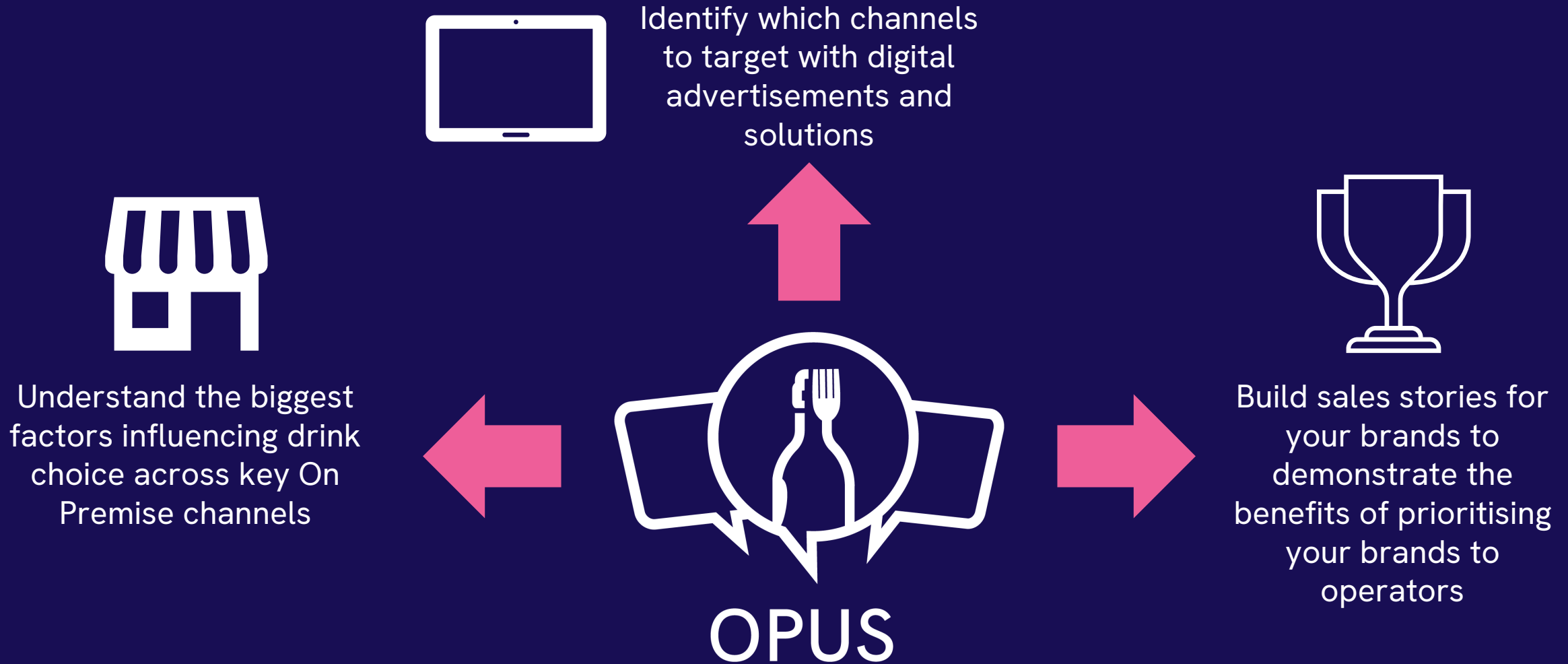
ON WHICH OF THE FOLLOWING TYPES OF OCCASION WOULD YOU BE MOST LIKELY TO CHOOSE PREMIUM DRINKS WHEN VISITING BARS, RESTAURANTS OR OTHER SIMILAR VENUES?

Asked to those who would choose a premium drink in the On premise

Occasions consumers would be most likely to choose a premium drink



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

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