

MEXICO MARKET STATS



8 out of 10 Mexican are exposed every day to TV and the Internet



BROADCAST TV

93%

of households own a TV



PAY TV

58%

of households have access to Pay TV services



RADIO

56%

penetration



INTERNET USAGE

70%

Of total population are users 80.6M people
55% of households have internet access



MOBILE

66%

Of total population own a mobile device

MEDIA PENETRATION IN MEXICO

DIGITAL MEDIA ADOPTERS

MEXICO'S MOMENT IS NOW



80% of the population connect to the internet

66% of the population own a smart device

Mexicans are ultra-connected to social networks.

98% are on Facebook

The largest country with the most e-commerce activity

85% of people buying at least one product or service on the internet

Amazon is the biggest online retailer, ahead of Mercado Libre and Wal-Mart of Mexico.

TV HOUSEHOLD

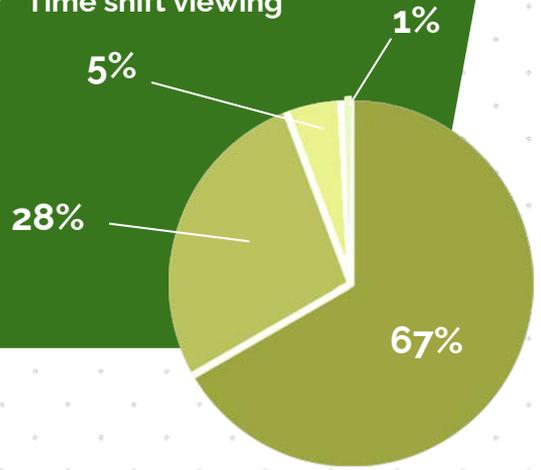
AVERAGE AUDIENCE

19%
of Mexico's population
consumes Television
on a daily basis



SHARE OF AUDIENCE

- TV
- Pay TV
- Dispositivos
- Time shift viewing



Fuente: Nielsen Ibope México. Promedio del 1 de enero al 15 de abril 2020

MEXICO CONSUMER MARKET PROFILE

POPULATION OF MAIN METROPOLITAN AREAS

Mexico City	19,802,161
Guadalajara	4,630,757
Monterrey	19,802,161
Puebla	2,235,730
Toluca	2,048,009
León	1,690,587
Tijuana	1,672,401
Juárez	1,374,292
Mérida	1,367,952
Torreón	1,297,189
San Luis Potosí	1,235,937
Querétaro	1,193,636
Aguascalientes	1,001,824

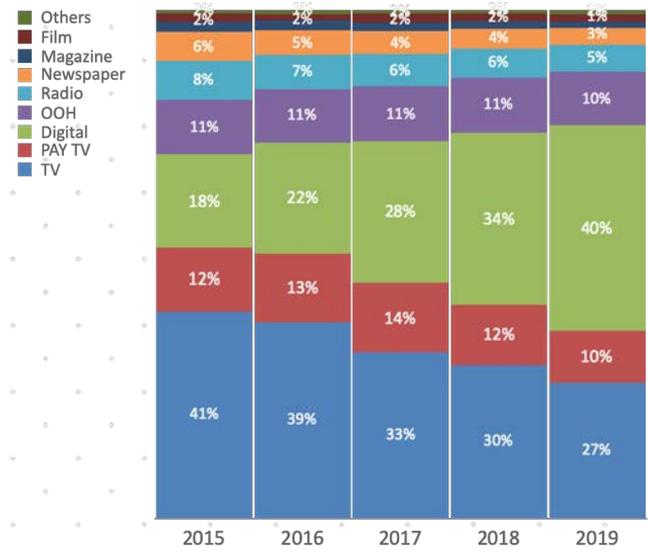
MEDIA SPEND IN MEXICO

Traditional media tops in Ad spend

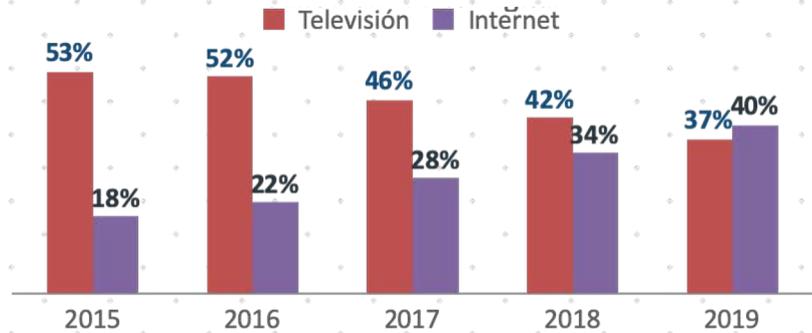
Digital investment has shown accelerated growth in recent years

As of 2019 Digital exceed television spend

SPEND BY MEDIA TYPE



SHIFT FROM TV TO DIGITAL



Source: Televisa Gross media spend intelligence

\$822.56B

Consumer Spending
in 2019

(+4.04% from 2018)

MEXICO CONSUMER MARKET PROFILE

CONSUMERS OF INTERNATIONAL BRANDS & SUPPORT INTERNATIONAL COMPANIES

2016

Food and non-alcoholic beverages	23.0%
Transport	18.0%
Housing, water, electricity, gas and other fuels	17.0%
Miscellaneous goods and services	10.0%
Furnishings, household equipment and routine maintenance of the house	5.0%
Recreation and culture	5.0%
Restaurants and hotels	4.0%
Health	3.0%
Clothing and footwear	3.0%
Alcoholic beverages, tobacco and narcotics	2.0%
Communication	2.0%
Education	1.0%

MEXICO CONSUMER MARKET PROFILE

POPULATION

128,000,000

Female 49% \ Male 51%
80% Urban \ 20% Rural

The majority of Mexicans live in the middle of the country between the states of Jalisco and Veracruz.

About a quarter of the population lives around and in main cities:

Mexico City Guadalajara Monterrey Puebla Puebla de Lerge Tijuana



MEXICO CONSUMER MARKET PROFILE

HOUSEHOLD COMPOSITION

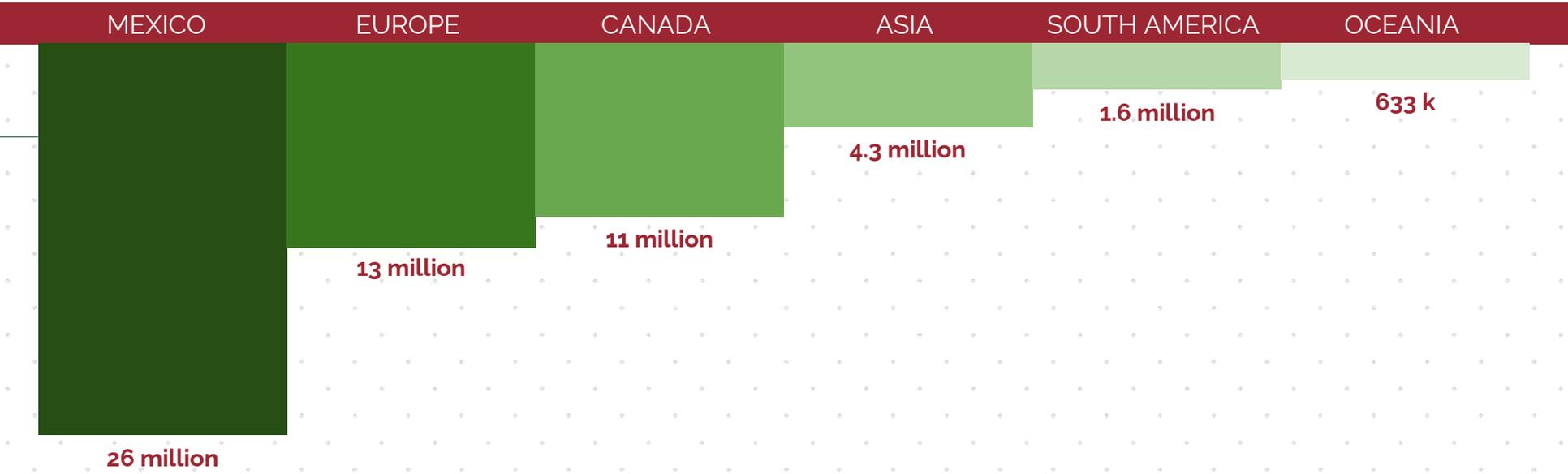
Average Age of the Head of the Household	39.5 Years
Total Number of Households (in million)	28.2
Average Size of the Households	4.2 Persons
Percent of Households of 1 Person	8.8%
Percent of Households of 2 Persons	15.6%
Percent of Households of 3 or 4 Persons	42.2%
Percent of Households of 5 Persons and More	33.4%

MEXICO

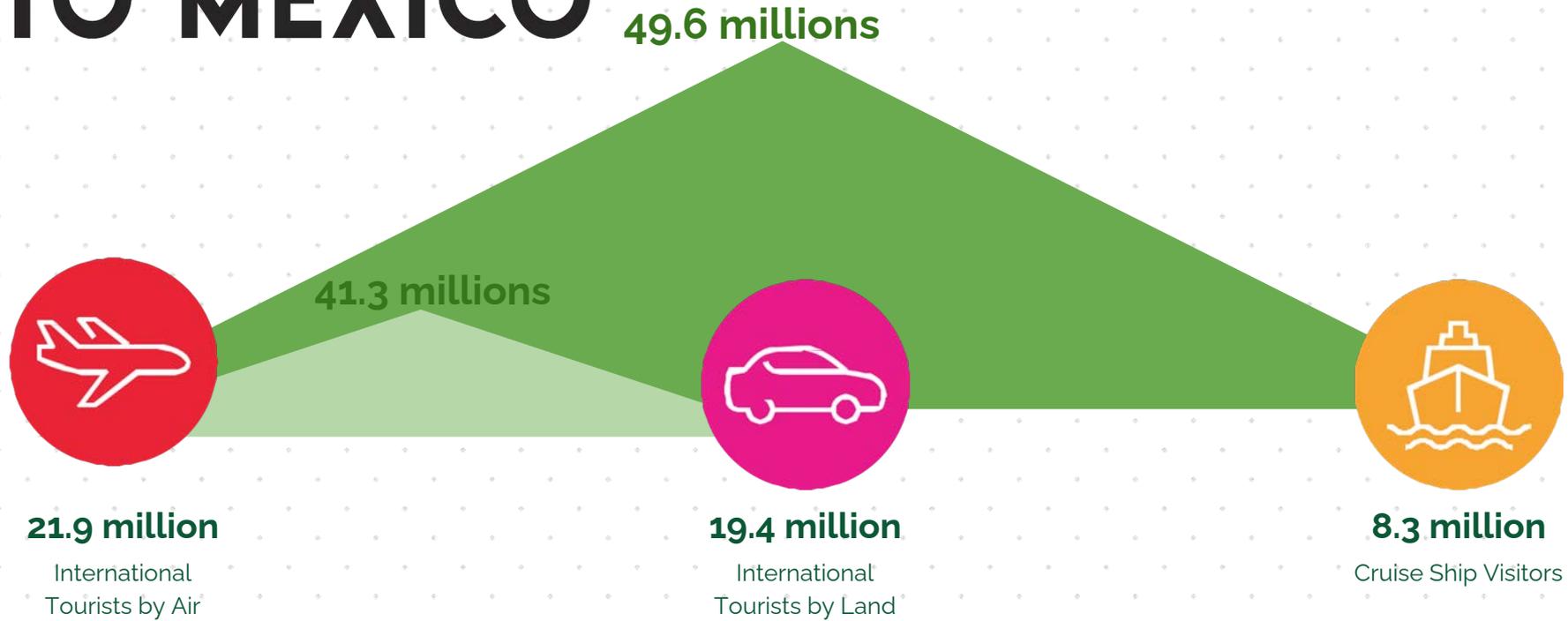
IS THE 7th MOST VISITED COUNTRY IN THE WORLD BY TOURISTS

U.S. CITIZENS

have traveled to Mexico more than to Europe and Canada combined



FOREIGNERS THAT TRAVEL TO MEXICO



In 2018, 49.6 million tourists visited Mexico. The 83.3% of the tourists arrived by plane or car (21.9 million and 19.4 million, respectively). The remaining 16.7% arrived by cruise.

MEXICO CITY AND CANCUN AIRPORT

receive 68% of international visitors

INTERNATIONAL VISITORS ARRIVING BY AIR 2019

Country / Region	Mexico City	Cancun	Total Mexico
United States	1,802,605	3,875,361	10,511,433
Canada	265,773	1,186,480	2,309,528
Europe	808,949	1,390,792	2,363,035
LATAM	1,748,076	1,153,896	3,012,961
Other	363,798	283,117	842,480
	4,989,201	7,889,646	19,039,437

Source: DATATUR - Secretariat of Tourism, 2020.

TOP DESTINATIONS VISITED IN MEXICO

U.S. represents 55% of Mexico's Tourism

MEXICO CITY



+52,000,000 International

CANCÚN



+25,400,000 International

COZUMEL



+540,000 International



MÉRIDA

+2,700,000 International



OAXACA

+1,100,000 International



VERACRUZ

+1,400,000 International

HUATULCO



+800,000 International



MINATITLÁN

+140,000 National



TAPACHULA

+380,000 National



VILLAHERMOSA

+1,200,000 National

TOURISM FROM MEXICO TO U.S.

Mexico is the second largest U.S. inbound market (after Canada) with 23% of all international visitations

21% of Mexican air travelers visited California and 18% visited Texas and Florida

Mexico accounts for 8.2% of total U.S. travel exports to all countries and ranks third, behind only China and Canada

The average Mexican air traveler spends six nights visiting the U.S.

TO U.S. CITIES VISITED BY MEXICANS		MAIN PURPOSE FOR VISITING U.S.		TOP ACTIVITIES
LOS ANGELES	13%	VACATION	53%	SHOPPING
NEW YORK	12%	VISITING FRIENDS / RELATIVES	21%	SIGHTSEEING
HOUSTON	11%	BUSINESS	17%	AMUSEMENT / THEME PARKS
LAS VEGAS	10%	CONVENTION / TRADE SHOWS	5%	ART GALLERY / MUSEUM
		EDUCATION	3%	FINE DINING

Source: 2018 Expansion study

**AIM YOUR
BRAND
TO THE
MEXICAN
TARGET**



**LET'S TALK
RFP**

THANK YOU

