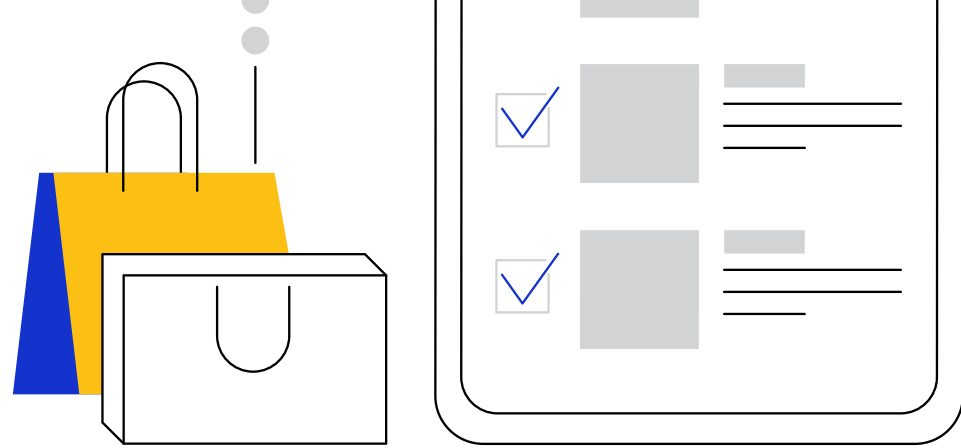


2024

Global Digital Shopping Index

Mexico Edition





2024

Global Digital Shopping Index

What is Click-and-Mortar™ shopping?

Click-and-Mortar™ shopping involves both digital tools and physical locations—when a consumer researches a product online, verifies it is available locally, and picks it up in-store that same day, for example. It is replacing the siloed world of online-only or in-store-only shopping.



2024 Global Digital Shopping Index: The rise of the Click-and-Mortar™ shopper and what it means for merchants

[Click here to download](#)

The 2024 Global Digital Shopping Index: Mexico Edition was commissioned by Visa Acceptance Solutions, and PYMNTS Intelligence conducted the research and produced the report. This report draws on insights from a survey of 13,904 consumers and 3,512 merchants across seven countries conducted from Sept. 27, 2023, to Dec. 1, 2023. To learn more about our data, reference the full methodology at the end of this report. PYMNTS retains full editorial control over the following content, findings, methodology, and data analysis. Click-and-Mortar™ is a registered trademark of What's Next Media and Analytics.



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What's at stake

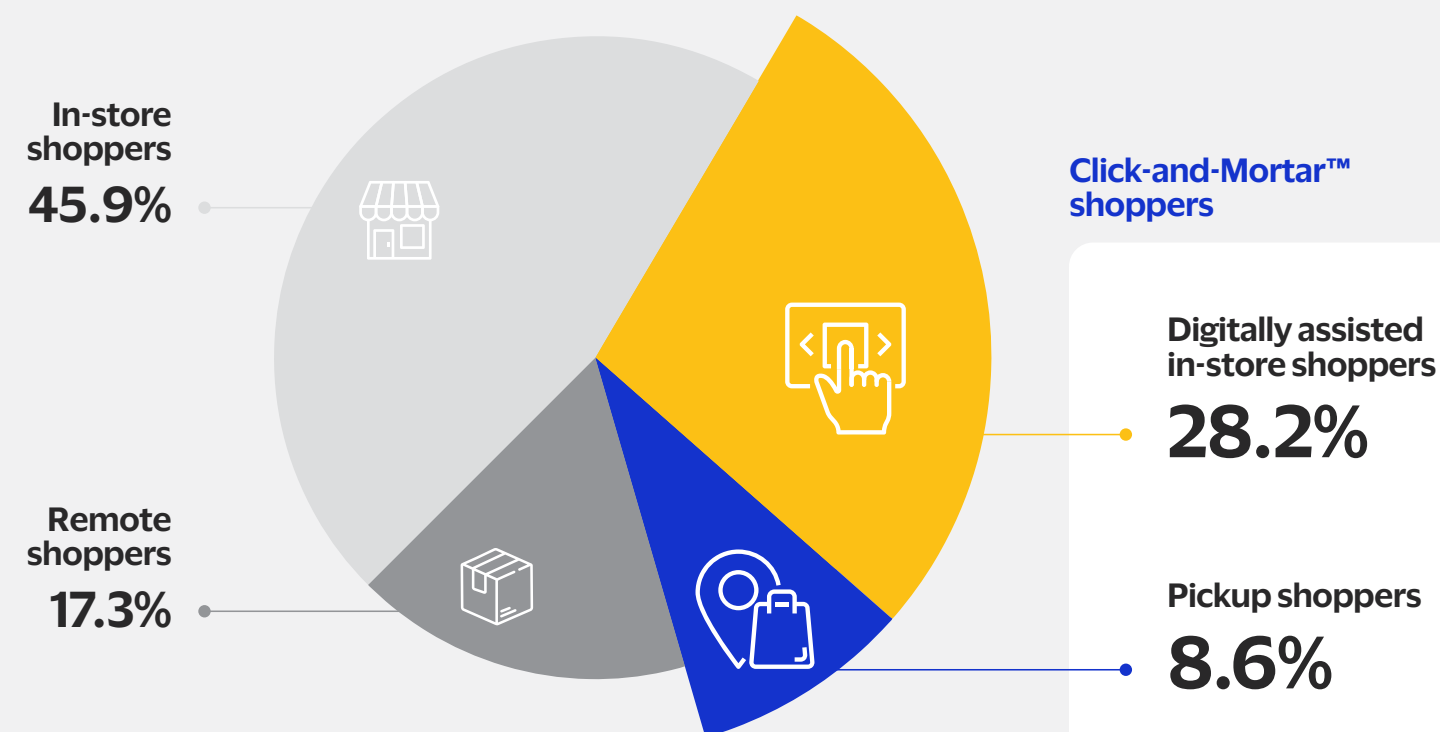
Across Mexico, consumers are turning in greater numbers to digital shopping features that offer savings and improve convenience while shopping in-store. Customers enjoy walking into brick-and-mortar locations but also want the ease that comes with using digital Click-and-Mortar™ features. Data from PYMNTS Intelligence shows that when stores offer such features, customers are happier about their experiences.

That means there's a big chance for stores to step up their game by both adding digital features and making those already available in the market more visible. This is good news for Mexico's merchants—by embracing the digital features that create Click-and-Mortar™ retail experiences, they can better satisfy their customers, tailor solutions to specific demographics, and grow their businesses.

Figure 1:

The types of modern shoppers

Share of Mexican consumers who shop in select ways



Source: PYMNTS Intelligence

2024 Global Digital Shopping Index, May 2024

N = 2,133: Complete Mexico consumer responses, fielded Sept. 27, 2023–Dec. 1, 2023

Several demographic groups are driving the adoption of digital features across Mexico's retail landscape. For example, 42% of parents juggling the demands of childcare are turning to this hybrid approach for its savings and convenience. Furthermore, the elevated adoption rates of millennials and Generation Z shoppers highlight the generational change underway in Mexico as younger consumers integrate technology into more parts of their daily lives.

Figure 2:**Shopping experience across demographics**

Share of consumers in Mexico with select shopping habits, by demographic

	In-store shoppers	Click-and-Mortar™ shoppers		Remote shoppers
		Digitally assisted in-store shoppers	Pickup shoppers	
Gender				
• Male	41%	29%	11%	19%
• Female	50%	27%	6%	16%
Generation				
• Generation Z	39%	33%	8%	19%
• Millennials	43%	31%	10%	16%
• Bridge millennials	43%	33%	9%	15%
• Generation X	50%	25%	8%	18%
• Baby boomers and seniors	62%	13%	5%	20%
Living with children under the age of 18				
• Yes	40%	32%	10%	18%
• No	58%	21%	5%	16%
Income				
• High (>\$250K)	40%	28%	10%	22%
• Middle (\$50K-\$250K)	49%	25%	7%	19%
• Low (<\$50K)	46%	32%	10%	12%

Local consumers in the lowest income bracket are actually the most likely to engage with digital features, at 42%, suggesting that access to technology isn't impeding greater adoption of digital features in Mexico. Rather, merchants should expand the user base for digital shopping tools by targeting higher income brackets, as only 33% of middle-income and 39% of upper-income consumers in Mexico currently use Click-and-Mortar™ strategies.

These are just some of the findings detailed in the 2024 Global Digital Shopping Index: Mexico Edition. This study was commissioned by Visa Acceptance Solutions, and PYMNTS Intelligence conducted the research and produced the report. For this edition, we surveyed 2,133 consumers and 563 merchants in Mexico to capture recent trends in consumer behavior and document the rise of Click-and-Mortar™ shopping experiences. We also draw comparative insights from a larger survey of 13,904 consumers and 3,512 merchants across seven countries conducted from Sept. 27, 2023, to Dec. 1, 2023.

This is what we learned.

Source: PYMNTS Intelligence
2024 Global Digital Shopping Index, May 2024
 N = 2,133: Complete Mexico consumer responses, fielded Sept. 27, 2023–Dec. 1, 2023
 Due to rounding, not all rows sum to 100.

Key findings

01 Favoring physical

Shoppers in Mexico are far more likely to visit a traditional brick-and-mortar retailer, but those who do find that digital features make their shopping experiences much better.



83%

Share of consumers who used a **physical store** the last time they shopped, underscoring traditional retail's dominance

02 Infrequent features

Consumers desire digital features, but merchants in Mexico have, until recently, often failed to provide them.



62%

Share of features consumers **want but cannot use** in Mexico

03 Meeting demand

Merchants in Mexico are beginning to respond to consumer demand for more digital shopping features.



8-10

Number of digital features, on average, that merchants report **planning to add**—more than any other market

04 Table stakes

Essential shopping features in Mexico focus on preferred payment methods and product information.



75%

Share of consumers citing the importance of using their **preferred payment methods** when shopping

The blueprint for merchants



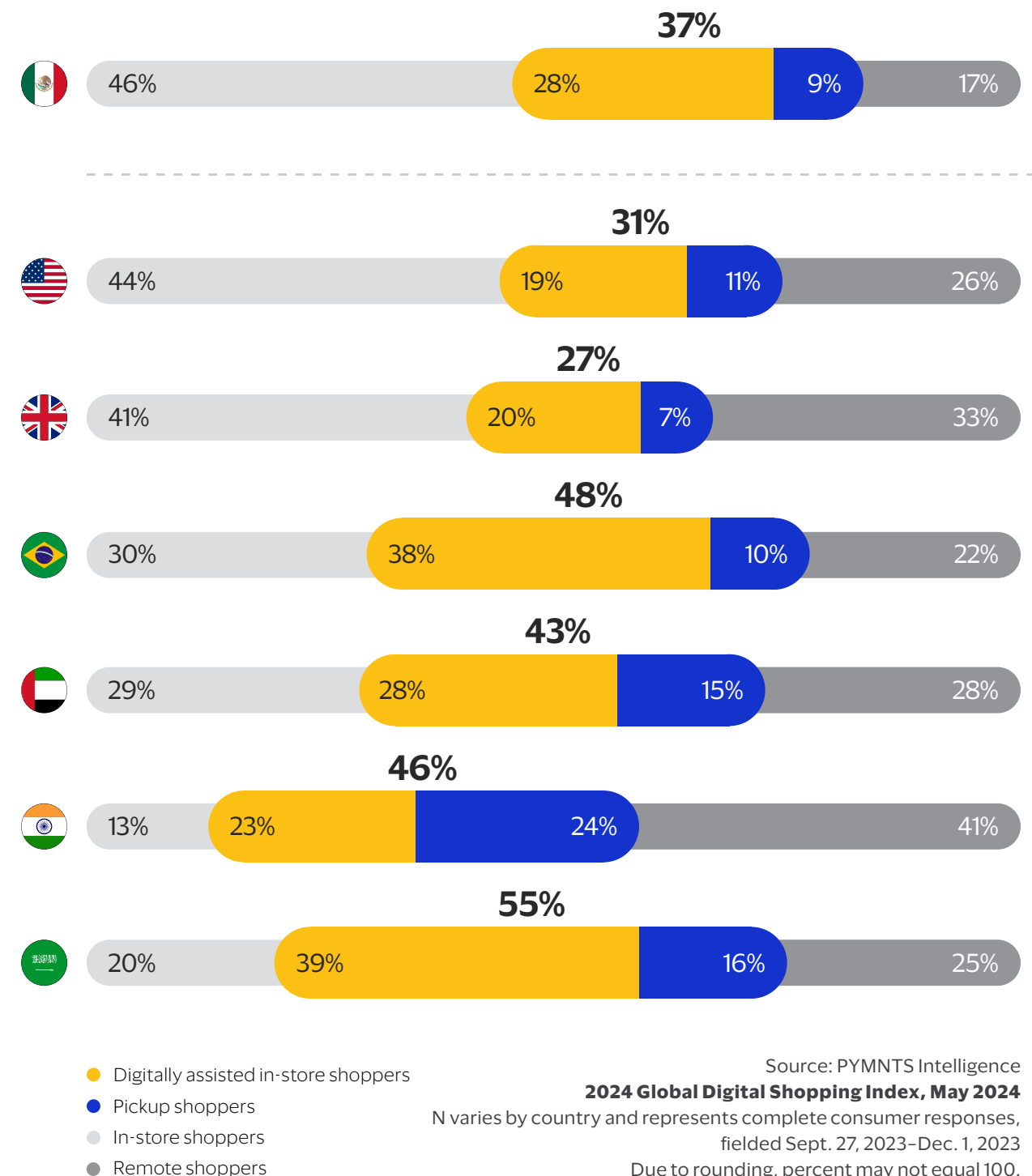
In-store shopping remains the norm for consumers in Mexico, so supplementing the brick-and-mortar experience with digital features represents the best way for merchants to leverage the shopping journey to improve revenue prospects.

In Mexico, 83% of consumers prefer in-store shopping, with 37% enhancing these experiences with assistive digital features or pickup options.

A significant segment of the market in Mexico clearly values the integration of digital features into traditional in-store shopping, as nearly 2 in 5 consumers use the Click-and-Mortar™ resources merchants already have available. This hybrid shopping model combines the tangible benefits of in-store experiences with the savings and convenience of digital aids, such as mobile apps for price comparison or product information. While 28% of consumers enhance their analog shopping with digital in-store assistance, an additional 9% initiate their shopping process online and conclude it in-store.

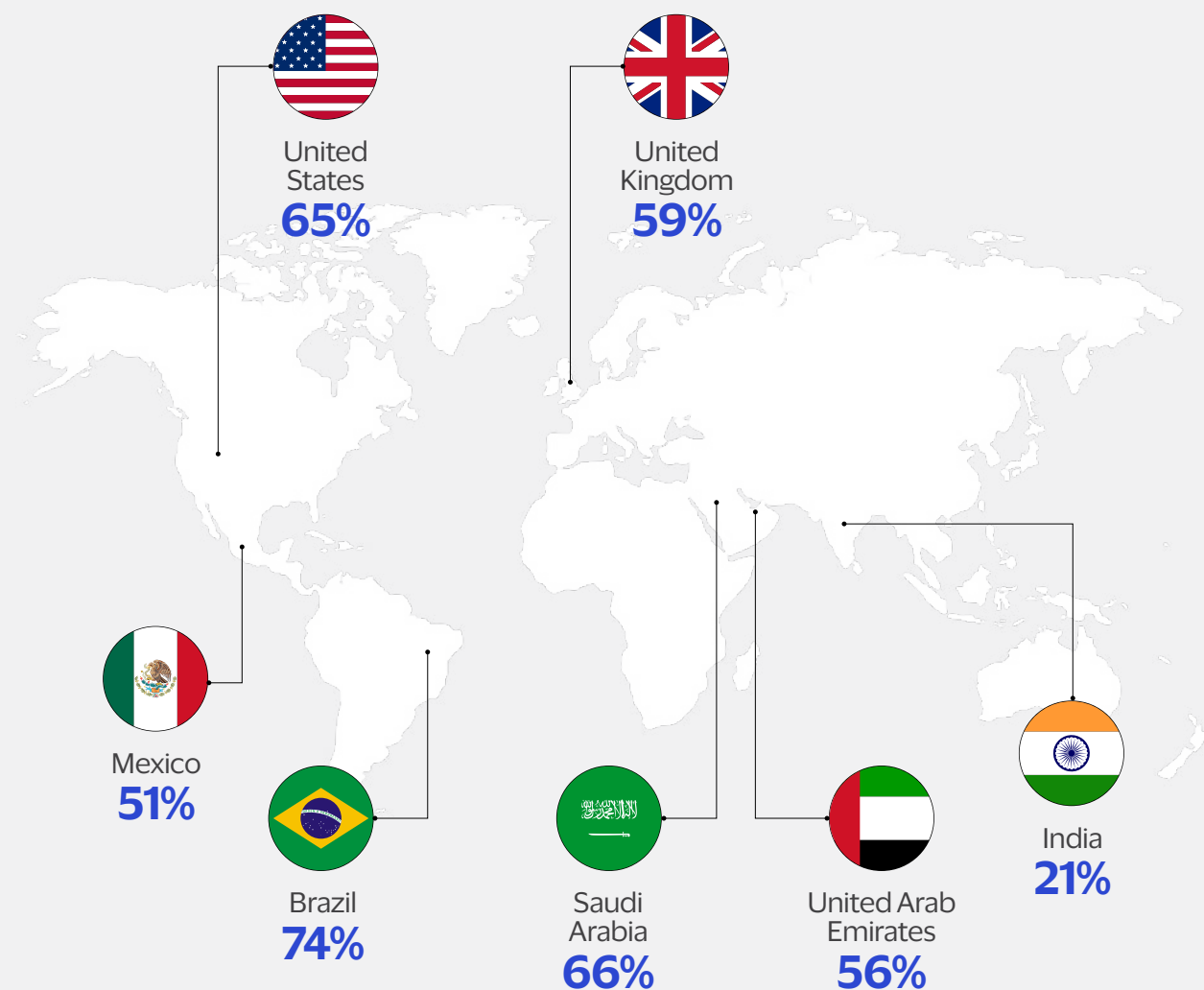
Despite this integration, Mexico trails other countries with a 37% Click-and-Mortar™ adoption rate overall, indicating that it still has much untapped potential for digital shopping solutions. As 46% of consumers in Mexico shop in-store without digital features, retailers have a significant opportunity to expand these offerings and potentially win over consumers. Likewise, retailers in Mexico should capitalize on the growing demand for Click-and-Mortar™ shopping by also better integrating digital features in physical stores. Doing so is likely to boost customer engagement and satisfaction.

Figure 3:
Where Click-and-Mortar™ shoppers are located
Share of consumers who shop in select ways, by country



Source: PYMNTS Intelligence
2024 Global Digital Shopping Index, May 2024
 N varies by country and represents complete consumer responses, fielded Sept. 27, 2023–Dec. 1, 2023
 Due to rounding, percent may not equal 100.

Figure 4:
Digital features improve the shopping experience
 Percent increase in shopping satisfaction index with digital assistance, relative to in-store only shopping



Source: PYMNTS Intelligence

2024 Global Digital Shopping Index, May 2024

N varies by country and represents complete consumer responses, fielded Sept. 27, 2023–Dec. 1, 2023

In-store shopping lays a strong foundation for leveraging digital features to make shopping better. Mexico boasts a 51% uptick in satisfaction scores when Click-and-Mortar™ strategies are employed. With these already robust in-store-only satisfaction rates, merchants in Mexico can turn the population’s penchant for traditional retail into a competitive edge by outclassing competitors with better digital offerings. In this way, Mexican retailers are actually well-positioned to not just meet but exceed global standards in customer satisfaction, thereby bolstering their revenue potential through greater customer satisfaction and retention in the process.

After all, catering to Click-and-Mortar™ strategies has been pivotal in enhancing customer satisfaction across other markets. Brazil leads in this regard with a 74% increase in customer satisfaction when employing this strategy over purely in-store shopping, closely followed by Saudi Arabia, at 66%. Although Mexico shows a 51% increase, the lowest among the listed countries, this still represents a substantial improvement that retailers can capitalize on. By further integrating digital features with their in-store experiences, retailers in Mexico have the potential to improve customer satisfaction even more. Considering the strong gains observed in other markets, it’s reasonable to expect that Mexico can match or surpass these improvements to set a new benchmark for customer experience.

Mexico's consumers show a clear preference for digital shopping features and report greater satisfaction when using them, yet merchants can do more to improve access to these tools.

A gap has opened between merchants' supply of digital features and consumers' demand. Across Mexico, shoppers exhibit a strong desire to integrate digital features into their shopping experiences—a sentiment captured by the 17% rise in the share of consumers heavily relying on such features over the last year. In fact, that represents the highest increase among surveyed markets. Merchants are not yet keeping pace with this growing demand.

In particular, the features that small to mid-sized businesses (SMBs) currently offer are twice as difficult to find as larger merchants' offerings.¹ But Mexico's feature gap also exposes an opportunity for improvement: There's substantial room for merchants to improve the alignment of their offerings with consumer expectations and, in doing so, optimize the Click-and-Mortar™ shopping experiences they provide.

¹ We defined SMBs based on their annual revenues, with firms generating less than MX\$20 million in Mexico considered SMBs.

Heavy reliance on digital features **surged by 17%** in Mexico last year—the largest increase observed across the seven markets surveyed.

Mexico's retail and grocery landscape is dominated by SMBs, which represent 46% of our sample in the country. For comparison, SMBs represent just 24% of the U.S. retail and grocery landscape, while this figure stands at 34% in the U.K. These SMBs face considerable challenges in delivering the digital features that consumers seek. They offer an average of five fewer features than their larger counterparts.

The accessibility of these features is also a primary issue for these merchants, as consumers find it twice as hard to discover digital shopping tools and use them in SMB settings. This difficulty contributes to a low rate of feature usage, with shoppers only using 56% of available features.

62%

Share of features consumers want but cannot use at SMBs in Mexico

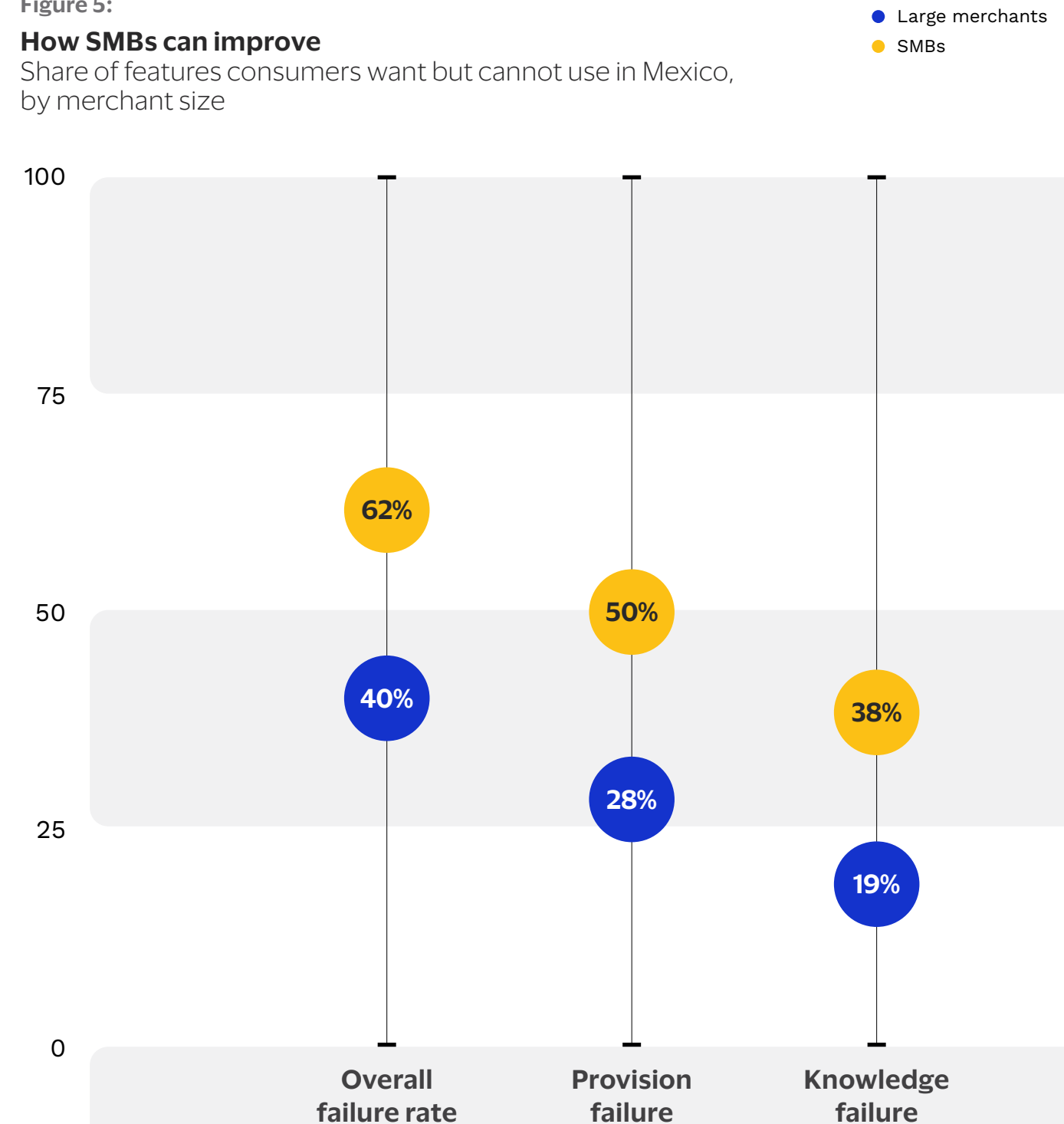
Another key metric is what this report series calls feature failure. Shoppers want to use features, and we consider it “feature failure” when a consumer wants to use a specific feature but cannot. This kind of failure can happen two ways: either merchants do not provide the feature (provisional failure), or the provided feature is too difficult for customers to locate or use (knowledge failure). SMBs in Mexico have a much higher rate of feature failure than larger merchants, with knowledge failure being twice as likely.

The data suggests that local SMBs’ current digital offerings may not be as user-friendly or well-aligned with consumer expectations as the features available from larger merchants, impacting overall satisfaction and indicating a significant opportunity for SMBs to enhance their digital engagement to meet the demands of their otherwise robust customer base.

Figure 5:

How SMBs can improve

Share of features consumers want but cannot use in Mexico, by merchant size



Source: PYMNTS Intelligence
 2024 Global Digital Shopping Index, May 2024
 N = 2,133: Complete Mexico consumer responses, fielded Sept. 27, 2023–Dec. 1, 2023

Mexico’s digital shopping trends may have reached a turning point, as merchants are rising to meet feature demands for the first time in years.

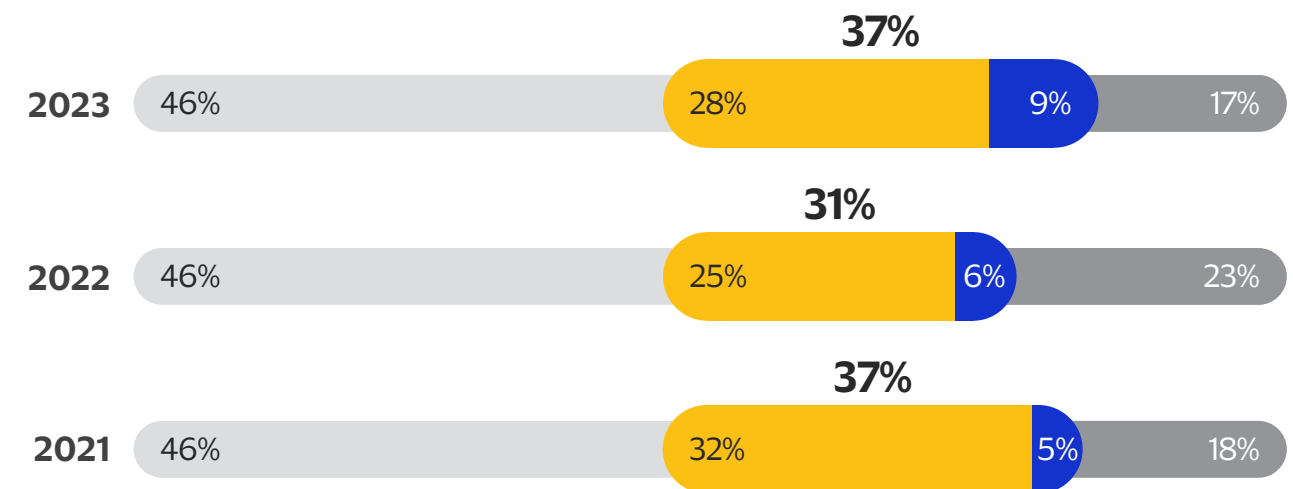
Click-and-Mortar™ shopping rates have hovered between 32% and 37% over the last three years, with shoppers in Mexico not following the global trend of increased digital feature adoption. Moreover, the number of features consumers want but cannot find has remained at 10 since 2022, suggesting that merchants in Mexico have not been as proactive as they could be about supporting feature use. During this time, the rate of purely in-store shopping has held steady, at 46%.

This trend suggests that consumers in Mexico are open to heavy feature use, but a legacy of underprovision and poor feature quality is likely contributing to stagnation. For merchants, this trend also signifies an urgent need to bridge the digital divide and refine the user experience to reverse the recent increase in feature failure and capitalize on the continually large population of local customers—and their growing appetite for digital assistance.

Figure 6:

How shopping styles have changed—or not changed

Share of consumers in Mexico who most recently shopped in select ways, time comparison



- Digitally assisted in-store shoppers
- Pickup shoppers
- In-store shoppers
- Remote shoppers

Source: PYMNTS Intelligence
2024 Global Digital Shopping Index, May 2024
 N = 2,133: Complete Mexico consumer responses, fielded Sept. 27, 2023–Dec. 1, 2023
 Due to rounding, percent may not equal 100.

46%
 Share of consumers in Mexico
 who most recently
shopped exclusively in-store

Merchants expecting increased revenue in the next year offer, on average,

6 more digital features

than those that expect no change in revenue.



In Mexico, merchants poised for revenue growth are expanding their digital offerings. Those that expect higher revenue in the next year offer, on average, six more features than those that expect no revenue change, illustrating a link between digital innovation and financial performance. Perhaps acknowledging this connection, even merchants previously lagging in digital adoption are now planning significant enhancements.

In 2023, merchants in Mexico reported that they planned to add more new features than merchants in any other market surveyed, with large merchants planning to introduce eight new features, on average, and small merchants planning to add 10. This shift indicates that merchants across Mexico's retail sector that prioritize digital feature enhancements will be best equipped to thrive in an evolving market. With many merchants having plans to implement new features, feature improvement may become mandatory to stay competitive.

The ability to use a preferred payment method tops the list of five essential features that shape Click-and-Mortar™ shopping preferences.

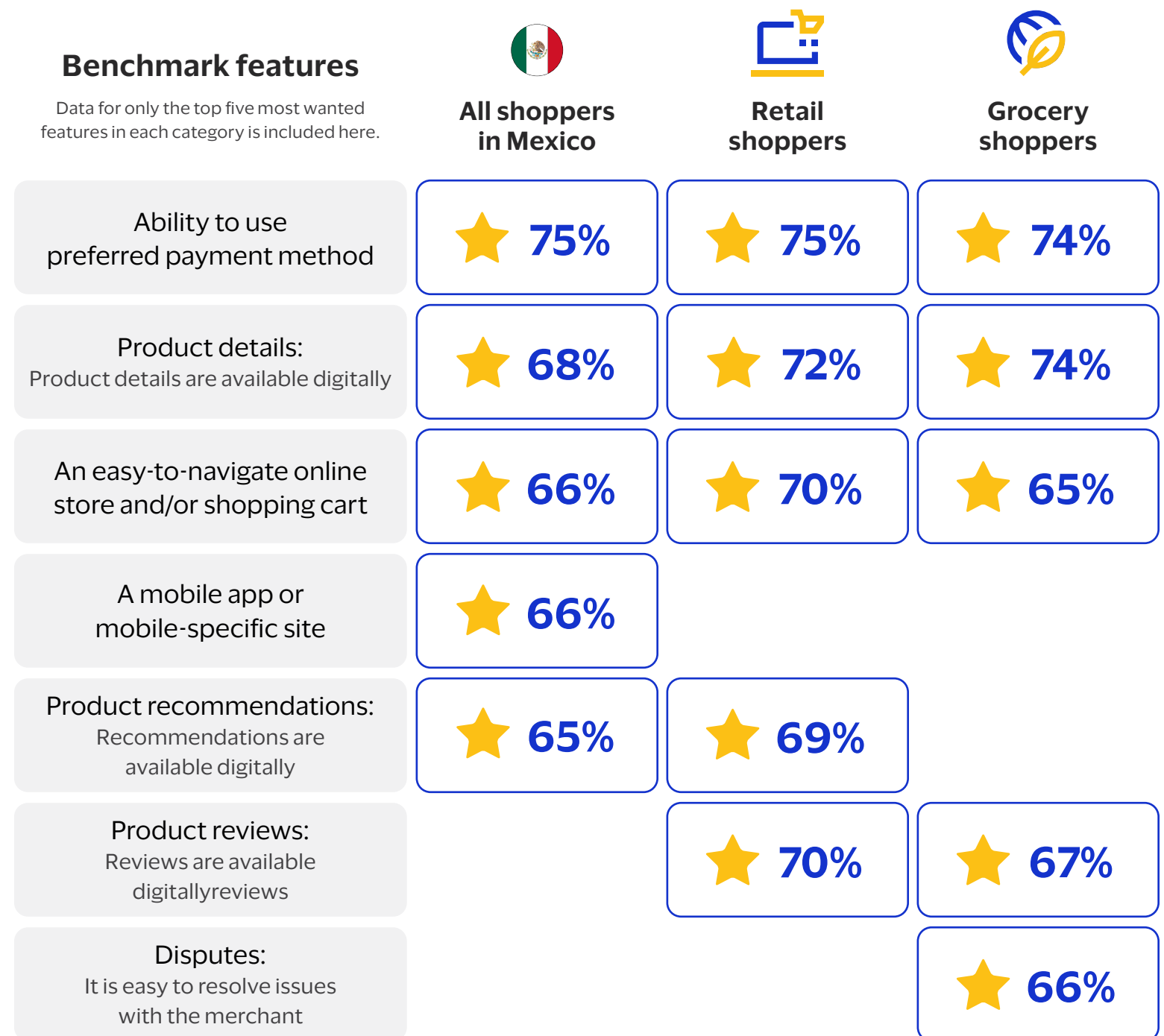
Depending on where they shop, consumers around the world rely on different features. Across the board in Mexico—from eCommerce sites to brick-and-mortar locations—consumers consistently value flexible payment options and user-friendly digital navigation. Retail shoppers lean toward digital product recommendations, while those frequenting grocery stores prioritize the efficient resolution of disputes with merchants.

These preferences point to the need for merchants in Mexico to adapt and tailor their digital offerings to align with the specific shopping contexts of their customers. Merchants in Mexico should implement a unified payment system that supports a variety of flexible payment options, including contactless and mobile payments, to accommodate the clear preference for payment flexibility across all shopping platforms.

Figure 7:

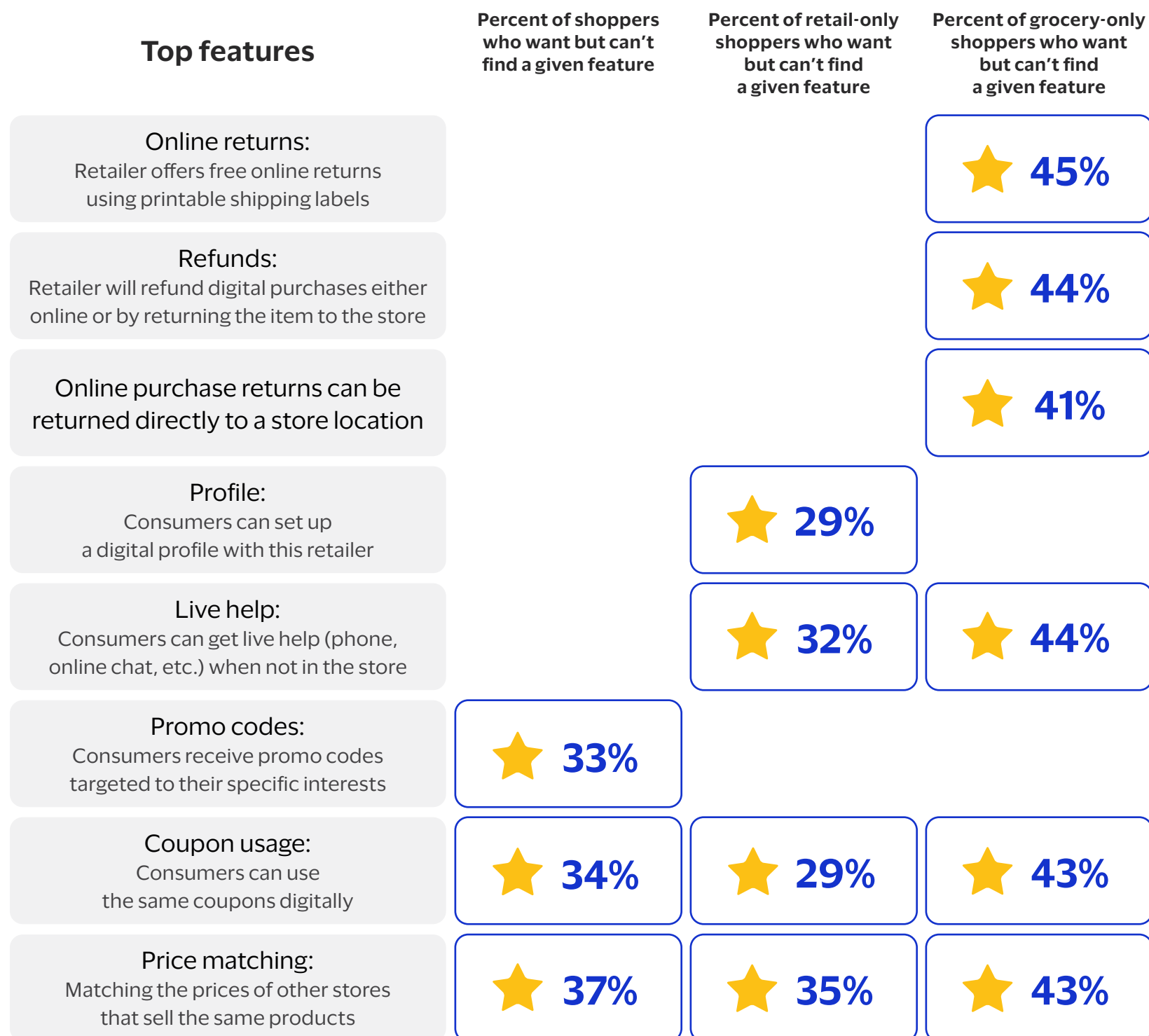
What consumers in Mexico prize

Share of shoppers in Mexico who used or would use benchmark features if available



Source: PYMNTS Intelligence
 2024 Global Digital Shopping Index, May 2024
 N = 2,133: Complete Mexico consumer responses, fielded Sept. 27, 2023–Dec. 1, 2023

Figure 8:
Features that can help merchants in Mexico stand out
 Share of shoppers in Mexico who want but can't find select top features, by product purchase type



In Mexico, merchants have the chance to stand out from their competitors by offering features that are currently underprovided yet highly desired, such as personalized promo codes and price matching. Shoppers are looking for promotions that cater directly to their interests, seamless coupon use across all channels, and assurance that they are receiving the best value.

Retail customers are seeking deeper connections with brands through digital profiles and readily available live assistance outside the store, while grocery customers emphasize the need for flexible return policies and support, highlighting a demand for robust customer service both online and offline. By focusing on these areas, merchants in Mexico can better position themselves for growth by directly addressing the specific service enhancements their customers are seeking.

Source: PYMNTS Intelligence
2024 Global Digital Shopping Index, May 2024
 N = 2,133; Complete Mexico consumer responses, fielded Sept. 27, 2023–Dec. 1, 2023

Actionable insights



01

More than 4 in 5 consumers in Mexico used a physical store the last time they shopped, revealing their fondness for in-store experiences. However, the data also shows that integrating highly prized digital features like preferred payment methods, which are important to 3 in 4 consumers, can significantly enhance this experience. Merchants should introduce features that are in demand but not widely available, such as promo codes and price matching. Merchants could also gain an edge on competitors by providing Click-and-Mortar™ features that align with customers' dual preferences for physical stores and digital enhancements.



02

Merchants planning to increase their digital offerings anticipate greater revenue growth than others, with those offering a higher feature count expecting a bigger revenue boost. This strategy not only boosts revenue but also significantly enhances the in-store experience. By integrating digital tools, these merchants directly link improved customer satisfaction with the convenience of seamless, integrated shopping solutions.



03

For SMBs, the lack of digital feature offerings is a significant barrier. The data reveals that consumers find SMBs' offerings to be twice as hard to locate or use as those at larger merchants. This challenge is reflected in the 62% of features consumers want but cannot find at SMBs. Bridge this gap by making existing digital features more visible and usable. In turn, this will improve customer engagement and satisfaction for many consumers in Mexico.

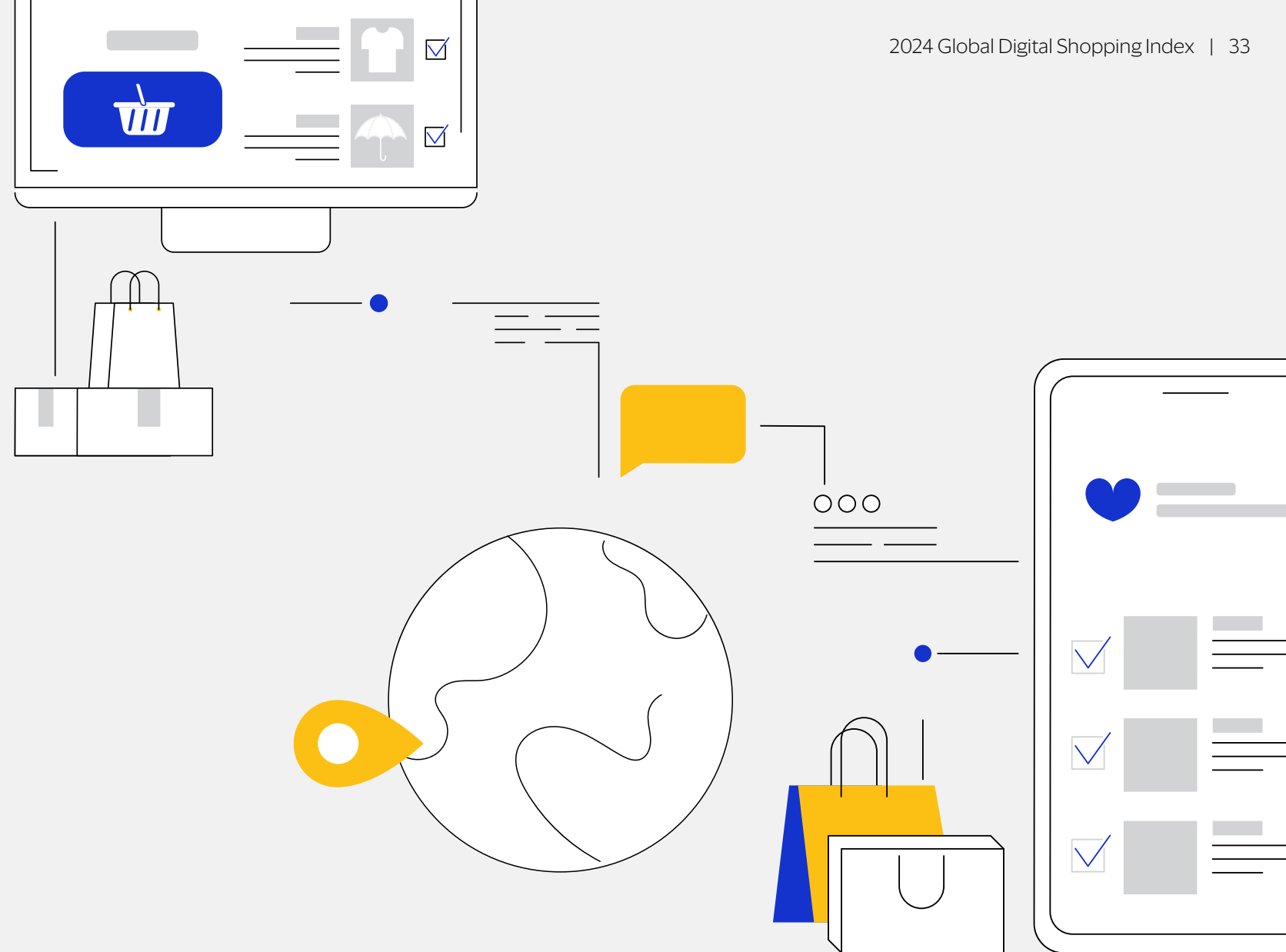


04

With so many merchants planning an expansion of digital features, staying competitive requires a proactive approach to innovation. The data shows that merchants in Mexico, both large and small, plan to add more features than those in other markets, with small merchants planning to add up to 10 new features. Continuously improve your digital capabilities, as this strategic foresight will likely remain essential as the retail landscape evolves and consumer demand for a seamless Click-and-Mortar™ shopping experience continues to grow.

Methodology

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