



SPECIAL REPORT

**The Latin American radio
panorama**
The future of radio in Latin America:
a new revival

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d+i LLORENTE & CUENCA

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1. INTRODUCTION

Radio in Latin America, as in other parts of the world, is about to have a second wind, thanks to the application of new technologies to the medium of radio. First heard in the 1920s, radio reigned unopposed until the 1950s and 1960s when television was introduced.

The audiovisual world dethroned radio but did not lead to its disappearance or extinction, as some predicted. It survived thanks to its greater closeness to the consumers (listeners) and its greater immediacy and flexibility, but it clearly lost prominence as a means of mass communication.

However, in this second decade of the 21st century, the Internet and the new "a la carte" communication methods may lead to a radio revival. In addition, the large number of stations has made radio in Latin America more heterogeneous and flexible, adapting to the political, social, religious and ethnic needs of the listeners.

In this report we will uncover the state of radio broadcasting in Latin America today (what is listened to and who listens to it) and look at the future prospects for this medium.

Specifically, we will look in more detail at the following aspects: the state of radio broadcasting in Latin America today, the fragmentation of audiences, the heterogeneity of supply, the consolidation of the large media groups and the outlook for this medium.

"Radio is, and will remain for a long time, the means of communication par excellence in Latin America"

2. THE RADIO SECTOR IN LATIN AMERICA

The radio sector in Latin America has two virtues that put it in a very good place to keep consolidating its position:

It enjoys prestige among the population as a whole and the listeners in particular.

Radio continues to be very important in Latin America. Reports by Latinobarómetro¹ normally suggest that it is the trusted medium for much of the population, with a 55% approval rating. Radio offers people company and entertainment, and for many it is currently the only medium for finding out what is happening in their country.

This prestige is even more pronounced for the stations broadcasting in FM than it is for those operating in AM, as highlighted by the radio specialist Tito Ballesteros who concluded that "AM is becoming less valued and FM more listened to. The findings of the study support this argument: there are 6,892 AM stations in Latin America and 13,394 FM stations".

An example of this prestige and trust can be seen in Peru, where it is worth discussing the case of Radio Programas del Perú (RPP), since it is not only the means of communication with the best reputation in the country, but also the only medium in the Top 10 of RepTrak Pulse Perú 2012, a

study carried out by Reputation Institute and Inmark Perú.

Great ability to adapt

One of the real historical virtues of this medium is its great ability to adapt to new times and to changes, thanks to being more flexible. It found an alternative role to television when television first appeared (appealing to its greater immediacy) and it has done so again with the arrival of the Internet (underlining its closeness to the listener).

As argued by Marta Garrido and Laura Pinto in an article in Radio Netherland "the new technologies, far from having supplanted radio, have made it more universal. Radio is merging with the Internet and is adapting to the social media. Despite there being an increasing number of people with access to the Internet, its use is still limited in Latin America since only 27% of people have Internet access. In any case, radio is, and will remain for a long time, the means of communication par excellence in Latin America. Although it has changed its format along the way to adapt to new times, its essence remains intact".

This ability to adapt has increased over recent times, with changes to the entire process involved in radio broadcasting: in the different areas of production, broadcasting, reception and interaction between the transmitter and the receiver.

¹ Latinobarómetro is an opinion poll that each year carries out around 20,000 interviews in 18 Latin American countries representing more than 600 million inhabitants.

"The structure of the radio sector is very similar in most countries in the region, characterised by being extremely fragmented"

From the point of view of production, the Internet is increasingly used for producing radio programmes and this encourages connectivity since it makes it possible to access a larger number of indirect sources and also to share productions in a way that is much more immediate than was possible with sending cassettes or CDs.

Thanks to the Internet, radio broadcasting has lost its ephemeral nature since the mass sharing of sound files is now possible after they have been broadcast, for example in podcast format. As a result, digital publishing and the possibility the Internet offers to store content online implies a great transformation for radio.

One example of this is the Colombian station Blu Radio, whose aim is to be a station that can be listened to on the radio, over the Internet and through mobile phones. The same is true in Peru with RPP, which in addition to being available through the television and the radio, shares information in real time on its website and adapts to the new digital platforms, such as Facebook and Twitter. It does so because of its policy of always being connected to its audience.

The way in which radio broadcasts are received has also undergone significant changes with the appearance of mobile phones that offer many more features than simple telephone communication and that have FM receivers. Similarly, mp3 players facilitate the production of content to download and share. The use of online radio

through computers, mobile phones and tablets is increasing.

3. WHAT DO PEOPLE IN LATIN AMERICAN COUNTRIES LISTEN TO?

The structure of the radio sector is very similar in most countries in the region, characterised by being extremely fragmented. There are two or three national channels, controlled by large communications companies, that are focused on audience numbers, and a large number of other broadcasters more focused on certain social niches, such as music stations for the young, evangelical stations for the religious groups and community stations for the indigenous sectors. It is clearly a case of having a fragmented audience and the radio stations responding to this by diversifying their service and content.

Taking as our base a study by Tito Ballesteros López in 2012 "La radio en América Latina y el Caribe, Mapa Interactivo" (Radio in Latin America and the Caribbean, Interactive Map), we can see that "the country with the fewest number of radio stations in AM and FM is Cuba (62) and the one with the most is Brazil (3,788). The Central American countries have a total of 3,649 stations while the South American countries have a total of 21,039. Brazil is the country with the most stations, followed in order by Peru and Chile".

Looking at the figures country by country, and taking into account

the lack of reliable audience figures in most of these, we can paint the following picture of the current situation:

- In **Argentina** the two generalist stations with the highest audience figures are Radio Mitre (owned by the Clarín group) and Radio 10 (belonging to the H Group until 2012 and now in the hands of the entrepreneur Cristóbal López) which have been fighting over the top spot in terms of audience figures for

over a decade. After 13 years of leadership by Radio 10, Mitre has fought back in 2013 in relation to mornings on AM.

According to Ibope figures, in June 2013, in the generalist area, Mitre had 41.6 points, compared to 19 for Radio 10. In third place was La Red, with 12.2 points, followed by Continental with 9.1. The table of the six most listened to was completed with Radio Nacional, with 5.7, and Del Plata, with an average of 4.6 points.

DISTRIBUTION OF AM AND FM FREQUENCIES IN LATIN AMERICA AND THE CARIBBEAN			
Country	Stations AM	Stations FM	Total stations by country
Mexico	675	388	1,452
Guatemala	288	52	280
El Salvador	100	148	248
Honduras	277	626	903
Costa Rica	56	69	125
Nicaragua	52	228	365
Panama	99	177	276
Colombia	850	1,124	1,974
Venezuela	680	563	1,243
Ecuador	233	926	1,173
Peru	466	2,192	2,732
Bolivia	850	262	1,112
Brazil	1,583	2,205	7,763
Chile	174	1,410	1,994
Uruguay	89	283	372
Paraguay	72	637	752
Argentina	177	1,839	1,924
Cuba	28	34	62
Dominican Republic	143	231	394
Total stations	6,892	13,394	25,144

Source: Tito Ballesteros, "La radio en América Latina y el Caribe, Mapa interactivo" (Radio in Latin America and the Caribbean, Interactive Map)

- In **Chile**, the stations with the highest audience figures, according to the international consultancy firm Ipsos, are Corazón with 8.5 %, followed in second place by Bío Bío with 7.7%. After these comes FM Dos and Cooperativa, both with an audience share of 5.3%, ADN (3.3%) and Agricultura (1.9%). These are stations with very different profiles and they are a good example of the fragmentation seen in these media and in radio in general. The audience for Bío Bío is the over 25s, while Corazón has a different target audience, the young listener.
- The pattern is the same in **Colombia**. There are two large generalist stations (Caracol and RCN) backed by powerful consortia fighting for the top spot in terms of audience figures.

Caracol Radio is the station with the largest audience, with 1,874,000 people tuning

“Radio in Brazil has experienced an enormous boom since there are a large number of stations”

in each day. Caracol has 39.31% of the speech radio market, while RCN has 26.20% and Olímpica 13.81%. In terms of listeners per network, these are 9,538,000, 6,357,000 and 3,352,000 respectively.

We can also make out the new paths that radio is taking, since we can clearly see a new development, for example with Blu Radio (96.9 FM) which saw an overall growth in its audience figures of 154%, according to the Estudio Continuo de Audiencia de Radio (ECAR, Continuous Study of Radio Audiences). This station, which began broadcasting in September 2012, saw an increase from 151,500 listeners per day to 384,400.

- In **Mexico**, in Frequency Modulation, Alfa 91.3 remains the leader, followed by La Z and La Kebuena, from Grupo Televisa; in fourth place is another from the GRC stable: Universal Estéreo, from Adolfo Fernández Zepeda, and in fifth place is Los 40 Principales, also belonging to Televisa Radio.

In AM, in terms of news channels, Carmen Aristegui, from Noticias MVS, remains at the top, followed by La Red from Radio Red, Joaquín López Doriga and Pepe Cárdenas.

- The radio in **Brazil** has experienced an enormous boom since there are a large number of stations: close to

3,700 if we add up the almost 1,700 on AM and 2,000 on FM. For a while, the habit of listening to the radio grew very rapidly but since the 1990s the penetration has been slower and always below that of television. As an advertising medium, the share of radio has remained stable and at a low level.

- In each of the two Andean countries **Bolivia** and **Peru** we see the dominance of one radio broadcasting group: FIDES in Bolivia and RPP in Peru.
- In **Bolivia**, the main national stations are Radio Fides, which has the highest audience figures, Radio Metropolitana, RED Erbol, clearly positioned on the left, Radio Panamericana, Radio Illimani, Radio La Cruz del Sur and Radio Nueva América. With broadcasting in the Aymara language: Radio Cóndor and Radio Emisoras Unidas.
- In **Peru**, according to a survey by Ipsos Apoyo, the news station RPP Noticias is the most listened to and recorded from among the list of radio stations in Metropolitan Lima, leaving the music stations in second place. This radio station is followed by Moda and Ritmo Romántica, both part of the Corporación Radial Group in Peru.

RPP Noticias also occupies the top spot in terms of audience

“The fragmentation of audiences, the heterogeneity of supply and the consolidation of the large media groups are three of the characteristics of radio broadcasting in Latin America”

figures from Monday to Friday, with 54% of responses, clearly ahead of its news and music station rivals, while at the weekend it is also the leader with 19 % of the audience.

In general, 64% of those surveyed said that RPP is the station they listen to most frequently.

- In **Venezuela**, the station that stands out is Rumbera, in Puerto La Cruz, which has the largest average audience (325,000 listeners). Another three stations in Puerto La Cruz exceed 200,000 listeners on average. In Valencia, the station Bonchona attracts 310,000 listeners. In Maracaibo, four stations, headed up by Mega, from Zulia, exceed 200,000 listeners. In Barquisimeto, the leader is Rumbera, the only one with more than 200,000 listeners. In the federal capital, the audience is divided among a large number of companies. Only three stations have more than 100,000 listeners: La Mega de Caracas, Onda Caracas and X Caracas.
- In **Ecuador**, radio is the most important and least concentrated means of communication, compared to the press and television. However, more than a third of all radio stations are located in Quito and Guayaquil, which reflects the high degree of geographical concentration of this means of communication in the two centres of economic and political activity in the country.

4. BUSINESS GROUPS

The fragmentation of audiences, the heterogeneity of supply and the consolidation of the large media groups are three of the characteristics of radio broadcasting in Latin America.

For these media groups, some are multinationals like the Spanish Telefónica and Grupo PRISA. The CEO of the Spanish communications group PRISA, Juan Luis Cebrián, announced in 2013 its plan to expand in Latin America given that PRISA's Latin American radio stations now account for more than sixty percent of the division's turnover and Radio Caracol (Colombia) is, in absolute terms, “more profitable” than the cadena SER channel in Spain.

- In **Argentina**, the two main groups are the Clarín group and Telefónica, multinational companies that control two of the radio stations with the highest audience figures (Radio Mitre and FM 100). In addition, we have the H group, owned by Daniel Hadad, whose main stations were purchased in 2012 by Cristóbal López, a businessman closely linked to Kirchnerism, from the Indalo group (Radio 10, with the highest audience figures, and the FM stations Mega and Pop).

In terms of the local multimedia groups, it is worth mentioning the aforementioned Uno group (Santa Fe, Mendoza, Entre Ríos), as well as others such as the El Chubut group (Chubut), the Segovia group (Santa

“Over the last few years there has been a rash of purchases of stations by larger groups”

Cruz), the Julio Shroeder group (Neuquén), the García Hamilton group (Tucumán), the Río Negro group (Río Negro), the San Luis group (San Luis), the Cadena 3 group (Córdoba), the Ancasti group (Catamarca), the Horizonte group (Salta), the ICK group (Santiago del Estero), the Montes Group (San Juan) and the Almada group (Misiones).

- In **Chile** the two largest groups merged in 2006. The Spanish company Unión Radio, from the PRISA group, which at that time controlled the Consorcio Radial de Chile (Chile Radio Consortium) with four national stations (40 Principales, Bésame, Radioactiva and W Radio), took over the largest radio group in the country, at that time owned by the Venezuelan group Cisneros. The resulting consortium, Iberoamerican Radio Chile, has eight national stations, several of them leaders: Pudahuel, Rock and Pop, Corazón, FM Dos, Concierto, Futuro, FM Hit and Imagina.
- In **Mexico**, public radio plays an important role and the state-owned Instituto Mexicano de la Radio (Imer) is involved in commercial broadcasting through 11 stations. Worth mentioning among the private companies is the Acir group, the largest group owning and operating radio stations. The consortium has more than 180 stations and is controlled by the Ibarra López family.
- In **Brazil** the Globo group stands out and includes the radio stations Globo and El Dorado, in Río de Janeiro; Nacional and Excelsior, in São Paulo; Continental, in Río Grande do Sul; Tiradentes, in Minas Gerais, and Reporter, in Pernambuco. Also worth mentioning are the Abril group, Folha group, the RBS group and the Estado group run by the Mesquita family.

Radio Fórmula, an organisation controlled by the Azcárraga Madero family, has also developed its own network of 83 stations in Mexico and the United States. It has a very strong presence in the Mexico City market.

Over the last few years there has been a rash of purchases of stations by larger groups, which has led to the consolidation of channels such as Imagen, owned by the Olegario Vázquez Raña family; ABC Radio, controlled by Mario Vázquez Raña; Radio Centro, with the Aguirre Gómez family as the majority shareholder; Radiorama, headed by the Pérez de Anda family.

A special case is the Multimédios group, the only regional group (it operates in the north of Mexico) that combines the publication of newspapers and magazines with television stations, Internet access and the running of a radio business (jointly with the Spanish PRISA group).

“The fragmentation of the audience has come hand in hand with a heterogeneous supply in terms of the content and types of stations that seek out specific target audiences rather than generalist ones”

- In **Colombia** behind the media we can see the hallmarks of large conglomerates: RCN Televisión and Radio belong to Organización Ardilla Lülle and Caracol Radio to the Spanish PRISA group.
- In **Peru**, the RPP group is the radio channel with the greatest coverage and one of the most important and most listened to in the country. It has 7 national radio stations offering daily programming for different types of audience: Radio Felicidad, Studio 92, Radio Corazón, Oxígeno, Radio La Zona, Radio Capital and RPP Noticias. Corporación Radial del Perú (CRP), is also a large conglomerate that has segmented music stations that connect with different target audiences. Its stations are Ritmo Romántica, La Inolvidable, Moda, Oasis, Radiomar, Nueva Q FM, Planeta, Inca and Mágica. The Panamericana group has radio Panamericana and radio Onda Cero and Corporación Universal has the stations La Karibeña, La Exitosa and La Calle.

5. DIVERSIFICATION OF SUPPLY

The fragmentation of the audience has come hand in hand with a heterogeneous supply in terms of the content and type of stations that seek out specific target audiences rather than generalist ones.

This diversification of supply translates into examples such as those in Argentina where,

according to the Asociación de Radiodifusoras Privadas Argentinas (ARPA, the Association of Private Radio Stations), the country has a total of 10,671 stations, of which only 4,145, or in other words only 38%, have documents authorising them to broadcast. This situation is even more pronounced in FM and in the metropolitan area of Buenos Aires, where there are 251 registered stations and 550 unlicensed ones. Here there are up to 20 stations broadcasting on the same frequency and, as a result, interfering with each other.

However, beyond this fragmentation of supply one can currently make out the consolidation of three types of radio station:

Generalist vs Specialist radio stations

Generalist stations are those with the most impact and political influence, especially in urban areas, but they are clearly in stagnation or decline since they take longer to modernise and adopt new techniques. This is because of their more traditional format and general content (mainly news and magazine programmes) that try to appeal to the largest number of listeners.

In contrast to this generalist radio, the specialised stations that dominate FM are having striking success as they target more specific listeners with more defined interests.

Community radio stations

These are stations designed to support the organisation of social

“It is the community stations that now stand out, especially those for indigenous and ethnic groups. They have a philosophy of public participation and preventing exclusion from society”

groups, such as those created in the past by the mining communities in Bolivia. It is the community stations that now stand out, especially those for indigenous and ethnic groups. They have a philosophy of public participation and seek to prevent the exclusion of the social and ethnic groups most neglected by the country's economy.

This type of station has been very successful in some countries like Bolivia, Ecuador, southern Peru and Guatemala, especially in terms of their establishment. This is the case with Onda Local, a network of Bolivian municipal stations from the Federación de Asociaciones Municipales (Federation of Municipal Associations) created with the support of institutions such as AECID and other cooperation agencies, and the Red de Radios de los Pueblos Originarios (Radio Network of Indigenous Peoples) and the Red Patria Nueva (New Nation Network), designed to support indigenous communities and unions.

Community radio stations are characterised by UNESCO for their high level of public participation, in both management and the production of content, and their decision making structure.

The survival of popular radio stations

They were a development that took place in the 1960s and 1970s and they are still going strong today in certain places. They have the profile of rural stations with alternative ideas, associated with the trade union left or religious

groups, some connected to Liberation Theology.

The development of popular radio stations initially had a double connection; first connected to the catholic sectors as a result of experiences in educational radio, and second connected to the unions which, for example in Bolivia, have their roots in the mining stations from the 1950s and 1960s.

One example of this is in Ecuador, where since 1988 the Coordinadora de Radios Populares y Educativas de Ecuador (Corape, Coordinator of Popular and Educational Radio Stations of Ecuador) has focused on supporting educational, popular and community radio services. Its objective is to encourage “the participation of the public in the process of recognising the culture of its people, as well as achieving the democratisation of communication as the central focus of its activities”. It involves 35 affiliated stations distributed over four regional networks, Amazónica, Quichua, Binacional and del Sur, that feed the Red Nacional de Corape (Corape National Network) with information.

6. CONCLUSION: THE FUTURE OF RADIO BROADCASTING

Not only has radio in Latin America not died, but everything points to it proving itself capable of adapting very well to new times and these are giving it a new opportunity, the chance to reinvent itself. Above all this is because radio continues to occupy a space that other media

“The advances in communication have not supplanted radio, but instead have complemented it”

cannot fill: the audience continues to prefer (or need) radio, although now it is not just in the home but rather at specific times of the day, in the work environment and increasingly over the Internet.

The advances in communication have not supplanted radio, but instead have complemented it, as noted by Juan Carlos Gómez, director of Observatorio de Medios de la Universidad de la Sabana (the University of La Sabana’s Media Observatory, Colombia), given that the arrival of new formats has encouraged the media and the professionals working in the media to make changes, required as they are to “come up with strategies and alternatives to prevent a loss of audience and this results in a benefit for the audiences who are looking for the best. Quality is always going to be popular with audiences, it is always going to help audience figures”.

What are going to be the key features of the Latin America radio panorama in the short and medium term?

- Firstly, the new paths being taken by radio are designed to strengthen the connection between the media and the listener. How?
 - » On the one hand, the future of radio will follow the route of diversified supply to adapt it to the different niches in the population.

Some developments in Latin America are following this pattern and trying to

respond to this change. In Argentina we have Vorterix, the latest project from Mario Pergolini, which combines radio, television and live events; and there is also Cienradios.com, from the Clarín group, which offers more than 400 links for online music content grouped into genre, decade and artist, among other combinations.

- » Radio in Latin America is also adapting to new times by increasingly involving listeners in programmes, therefore bringing the medium closer to the consumer.

For Juan Carlos Gómez, the aforementioned director of the Observatorio de Medios de la Universidad de la Sabana, the new proposals for morning radio are founded on the evolution of the medium, generated by the emergence of the social networks and the new electronic media.

The best way to work out what the listeners want is, according to Gustavo Gómez, from Caracol Radio, “To do what they do: listen to them. Taking the temperature on the street, in taxis, from emails and on-air calls, from Twitter... you have to listen to the listener!

In Peru, this is the format used by Radio Capital,

“Although the traditional way of listening to the radio still exists, the consumption centre for radio has moved from the home, a fixed and stable point, to tablets, computers and mobile phones”

belonging to the RPP conglomerate. The approach adopted by Capital has been clear and direct from the start: Giving the public a voice through telephone calls so that they can express their opinions during the programmes. “Your opinion is important” is the slogan used to promote this activity and that has been retained to date.

- Secondly, the scope and platform for the relationship between the medium and the listener are going to change, as in reality they have already done.

Not only is the relationship between the medium of radio and the listener changing, but so is the platform that supports this relationship. As was very rightly argued in the newspaper La Nación de Argentina “the dial has moved from the radio spectrum to the Internet, where there is no AM or FM. There the old formulas compete with new proposals, stations that reproduce the programming that they broadcast over the “ether” and new alternatives that are only found online”.

This has already become a very clear trend in some countries and in other countries it will arrive sooner rather than later (as the emerging middle

classes gain purchasing power and can access the new technologies). According to the audience measurement company ComScore, in December 2012 more than 3.6 million Argentinians aged over 15 listened to the radio through the Internet (20% more than in 2011) and they listened to an average of 3.16 hours. This figure only includes those doing so through their computers and does not take into account the many listeners accessing the services through specific applications on their mobile phones, either through 3G networks or Wi-Fi connections.

“Although the traditional way of listening to the radio still exists, the consumption centre for radio has moved from the home, a fixed and stable point, to tablets, computers and mobile phones, mobile devices that allow us to inform and entertain ourselves on the go”, argues Pablo Salvatori, Director of Marketing at Batanga Media, whose platform has 1.4 million registered users.

- On changing the relationship between the listener and the radio, and the platform where this relationship exists, there is also going to be a change in what is consumed, since online radio is very segmented and not very generalist.

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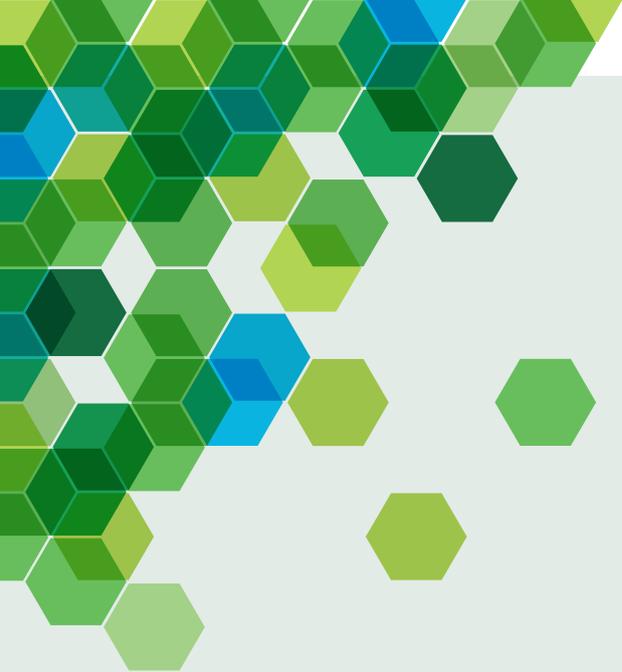
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