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LLORENTE & CUENCA

# CONSUMER TRENDS 2019

Madrid, January 2019

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# Introduction

We live in a constant paradox: as technological disruption brings us closer to computer and machine evolution, our humanity clings ever so dearly to what is left of our relationship with the environment and society.

Through this report, we wish to further expand on what to expect from the trends that will emerge from this paradox in 2019.

Accelerated transformation has turned us into forever rookies: we are constantly adapting and learning new skills... just to forget them later. What a shame! This, on top of the daily back-and-forth with the endless information stream, has evolved us into “mestizo consumers” - constantly mixing-up our identities to become more relevant in today’s society. Something in us has changed; during the social media boom, we were eager to jump on the bandwagon and mindlessly create as many channels and profiles as possible. Said eagerness has now turned into caution. The abundance in streaming options has made consumers wearier of privacy and less dependent of joining a platform merely based on its hype.

Consumer voice will play a defining role in the following months, determining behavior and consumption patterns for the rest of the year. It will cause brands to rethink their strategies, making them focus more on creating rich experiences for their consumers and pushing them further towards activism activities.

Moreover, in 2019, we can expect eSports to continue its immense growth and seeing the meaning of “adulthood” drastically change into something new.

As the battle continues between technological advances and persistent human resistance, we’re in for a thrilling 2019.



# CUSTOMER EXPERIENCE



# Customer Experience

Premium brands often say that “luxury is in the details.” No matter how advanced our technology is, the basics of customer service are the keys to success: getting to know customers in order to anticipate their needs and know how to solve them immediately. If we mix this idea with responsible digital management... boom, we have hit gold.

A CISCO report on “Customer Experience in 2020<sup>1</sup>” reveals that 70% of purchasing decisions will be based on consumer experience, and according to VentureBeet<sup>2</sup>, in 2020 the average person will have more conversations with bots than with his or her partner.

The question of how to apply and capitalize technology and digital strategies to marketing is relatively simple. However, regardless of the complexities that a strategy may have, brands that wish to maintain healthy relationships with their customers must ensure a pleasant pre- and post-

buying experience. This includes attracting them digitally, the purchase process, delivery, packaging and hands-on product usage.

A good example of this is what Bacardi Limited’s Grey Goose vodka is doing in select markets around the world. The French brand has decided to think “out of the box” and offer more than a drink of supreme quality. It now gives its best customers the “Grey Goose Cocktail Concierge” service, taking the brand experience further through use of an expert mixologist that gives the consumer the opportunity to fully enjoy the product. These types of strategies foster word of mouth and encourage sharing of the event on social media, either via story or post. Nowadays, experiences are what determine the behavior of what is shared on, for example, Instagram or Facebook. The latter published in its latest 2018 report that out of 20,000 pages analyzed from its network, there were 12,819 million interactions. In other words, 1,528 interactions per publication.

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1 *Customer Experience in 2020- Seven Technology Trends Defining the Future of Customer Experience*. Recovered from <https://www.cisco.com/c/dam/en/us/solutions/collateral/digital-transformation/customer-experience/cx2020-whitepaper.pdf>

2 VentureBeet <https://venturebeat.com/2017/06/25/how-sound-plays-a-role-with-conversational-interfaces/>

*“Today, consumers are eager to share their experiences on social media. Only brands that are aggressive in their way of communication and know how to integrate different areas of knowledge to marketing strategies such as design, psychology, content production, sales and public relations, are the ones that will retain consumer preference”*

**Melissa Uribe**, Marketing Director of Bacardi Mexico.



**E-SPORTS  
EVERYWHERE**



## e-Sports Everywhere

The e-Sports “boom” gained prominence in 2018, and most likely will continue to do so in the upcoming years. Brands, companies and celebrities have become a part of the phenomenon that is the world of electronic sports; partnerships that were formerly considered trends have become necessities.

e-Sports have become an economic engine due to their massive, ever-growing audience. To give context, in 2017, 60 million people followed the finals of one of the e-Sports games championships. By 2020, more than 300 million people worldwide are expected to watch online electronic sports.

This sudden growth is a golden opportunity for brands and companies looking to connect with an audience beyond their reach. In general, gamers and their audiences are young and unlikely to watch cable television; the vast majority show no interest in watching traditional sports. According to a study by Nielsen Media, 70% of users (active or not) are men between the ages of 13 and 40 – two thirds of respondents stated that they watch live e-Sports broadcasts, and 37% said that they had attended in-person events before.<sup>3</sup>

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<sup>3</sup> Nielsen, “*The esports playbook: Maximizing investment through understanding the fans*,” October 3, 2017.

It is important to note that this boom is a direct consequence of changes in consumer habits, specifically TV viewers. Consumers are increasingly choosing to move from traditional TV to streaming and social platforms. Brands that have noticed this trend and used it to their advantage, hit a gold mine: Facebook, for example, has bought exclusive rights to four popular tournaments, as has Amazon. By 2020, the global e-Sports market is expected to generate about \$1.5 trillion in annual revenue, mainly from advertising and sponsorships, with an estimated 600 million followers.<sup>4</sup>

Big and small brands, companies and the media wish to join the fast-moving world of eSports, but how can they do it? What is the correct way of providing something of value to the e-Sports universe and entering it credibly? The world of electronic sports has unlocked multiple opportunities for advertising and sponsorships: it has created a new means of entertainment consumption and granted access to a newly discovered global audience. To be part of it, brands must follow consumer habits and take the fundamental leap towards streaming platforms, social networks and live events – then, they must prepare for the fierce competition that exists in the digital world.

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<sup>4</sup> Statista, “*eSports market revenue worldwide from 2012 to 2021*,” 2018



Forever Rookies

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## Forever Rookies

How many times have changes and updates made you almost stop using an app completely?

According to an Ericsson<sup>5</sup> study, 30% of participants recognized that the speed at which technology is developing makes it impossible for them to keep up to date with its capabilities and abilities. Efforts to learn and relearn are increasingly becoming an endless race. According to a report by Statista, in 2018, around 6,140 apps were added daily to the Google Play Store, and almost a third of the 3.5 billion searches performed on Google every day are made via voice searches through personal assistance devices (TheeDesign, 2017).

New technologies come with an informational overload in which brands are increasingly involved with, making consumers feel challenged to keep up with the information. Consumers are struggling to accomplish simple day-to-day tasks associated with technology that on paper was created with the intention of making their lives easier.

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<sup>5</sup> Ericsson 10 hot consumer trends for 2018

We generally only learn new skills when we truly need them - *but because of recurrent technological advances, learning is becoming a necessity... that ironically, is made easier because of our access to technology.*

Brands must also adapt and prepare for this whirlwind of data to not lose opportunities with respect to consumer behavior. Many see it as a great opportunity that will further accelerate learning and thereby increase the new needs of the labor market. In the previously mentioned Ericsson report, 46% of respondents also said that the internet helped them learn and forget skills at ever-increasing speeds.

As Kevin Kelly points out in his book “The Inevitable,” one of the great trends which will guide us in the coming years has to do with “flowing:” letting ourselves be carried along by a stream of change in which our own capabilities will have to adapt to learning and forgetting at an ever-increasing speed in order to navigate in a constantly changing environment.



THE REIGN  
OF THE  
VOICE



## The Reign of the Voice

Voice recognition has started to modify the way in which the consumer relates to the environment in his/her day-to-day life to such an extent that it's been capturing the attention of different sectors and causing brands to incorporate this new method of interaction. Using the voice has become more than a product; it has become an experience.

Amazon announced that it intends to sell 113 million Echo devices in the coming years, and although they currently lead this sector, competition in the device market is expected to be fierce: Siri, Alexa and Google Assistant are just a few of its main competitors.

This voice trend is permeating and being implemented in other consumer moments, changing the ways of relating to products and brands in all sectors:

- **Automotive:** Lexus drivers can make phone calls, control music and activate temperature, audio and navigation functions through simple voice commands.
- **Healthcare:** WebMD recently added an option where Alexa can answer basic health questions by describing treatments for common illnesses and listing the side effects of medications.
- **Government institutions:** In the United States, the beta version of an Alexa tool provides information on public events and has plans to

connect 311 services to the tool in the future. Soon, tools for Windows Cortana and Google Assistant could be launched.

- **Hospitality:** The Wynn hotel in Las Vegas has installed Echo devices in each room, allowing hotel guests to use voice commands to turn on lights, adjust temperature and listen to music. Marriott and Four Seasons are also testing Alexa and Siri in their rooms. Eventually, hotels expect to use voice recognition to enhance personalized attention services, such as requesting additional towels or room service.
- **Finance:** Capital One has developed applications for Alexa and Cortana. Banco Santander allows its customers to make voice payments through its iPhone application. UBS clients in Europe can ask Alexa about their office investments and general questions about finance and economics.

Ultimately, it's not just about making existing content fit a device's considerations. The voice recognition trend suggests that brands and businesses need to reconsider their product design, their relationships with partners and consumers and even their organizational structure. The whole company must adapt from all points of view. If we play our cards right, the voice driven by artificial intelligence could help doctors diagnose diseases or HR managers find the right candidate in the future.

*Part of Toyota's core has always been to develop and implement innovations that increase the safety of its drivers. Voice command recognition in Lexus cars gives drivers the opportunity to focus more on driving, in addition to allowing access to music, temperature and navigation controls, among others, making the on-road experience, more pleasant*

**Adriana Paredes**, Marketing Manager of Ricardo Pérez, S. A. Distributor of Toyota and Lexus in Panama.



# THE STREAMING WAR



# The Streaming War

Consumers are becoming more and more demanding with the content they want to receive. They are even willing to make changes to obtain a more personalized service tailored to their tastes: they have replaced paid TV subscriptions with streaming platforms. This ensures an ad-free experience and access to content based on affinities. More than quantity, the new consumer is looking for quality.

The changes in content consumption in recent years are determined by the on-demand generation: Generation Z. Not only is it creating its own habits, but also influencing the viewing habits of several parents and millennial siblings. By 2019, 848.9 million global video streaming users are expected.

The streaming content revolution is impacting various business models in different sectors:

- **Telecommunications:** Demand for data services for the high consumption of digital content has risen, causing telecommunications companies to develop new products, package, and native video streaming platforms (Claro Video, AT&T).
- **Electronics:** Device manufacturers seek to be increasingly innovative with additional features and devices that allow access to different content platforms from wherever the consumer decides: Smart TV's, streaming players (FireTV, Roku, Apple TV ...), smart phones...

- **Social media:** Facebook Watch, Instagram TV (IGTV), YouTube TV have their share of the cake made up of established platforms such as Amazon Prime, Netflix, HBO Go, FoxNow and Hulu, among others.
- **Entertainment:** Film studios, directors, talents, etc. participate in the creation of original and entertaining content for important streaming platforms. Investment in large productions is migrating from movie theaters to home theaters. This shift is even reflected in nominations for entertainment industry awards. Other companies will join Disney and its Disney+ platform to introduce their own streaming services in 2019.

Traditional Hollywood talents are now seeking a greater streaming presence to reposition themselves as brands, as YouTube stars are outperforming them in terms of audience recognition.

To win the war for user's attention, platforms will have to gauge their efforts on price, attractive content and more innovative formats. The main winners in this war will be content producers, as licensing prices will skyrocket. The challenge for streaming platforms is to know the interests of consumers in more detail, to be more efficient in their differentiating proposals.

*The 2019 trend for content platforms is that they will continue to grow and at an accelerated rate. Large platforms such as Netflix, Hulu and Amazon Prime Video are investing more and more of their budgets in original content, forcing paid-TV to change and causing brands to seek more authentic and transparent ways of reaching consumers*

**Julio De Los Santos**, Digital Marketing and Trademarking Manager, Banco BHD León.



**CHANGEMAKERS BRANDS**



## Changemaker Brands

Although the concept of *love brands* is still valid for some companies that target consumers, the transition to *citizen and legislative brands* is imminent in 2019.

Citizen brands are characterized by having a clear purpose of improving the world in a way that is relevant to their business. Many of these companies have active internal functioning policies and social responsibility activities with which they contribute to these purposes.

Columbia Sportswear, an outerwear brand, incorporates sustainability in all its processes. In addition, part of its Corporate Social Responsibility (CSR) actions consist of donations and collaborations with national parks and protected natural spaces in different countries. Cases such as Volvo working with WWF as a partner for the Climate Savers program, are already common. The company announced last year that, in 2019, it will only launch hybrid or 100% electric cars, completely discarding the exclusive motorization of fossil fuels in new models.

However, more and more companies are taking the step towards what we call *legislative brands*: they position themselves directly before government officials, asking for legislative changes or support for public policies that correspond to their values and purpose. This is how companies like Coca-Cola and Delta Airlines positioned themselves in favor of LGTBI rights, forcefully asking the Supreme Court of the United States to dictate sentence in favor of equal marriage. Recently, hundreds of companies

such as GE, Unilever and Novartis have asked the White House not to withdraw from the Paris Agreement on climate change.

In the December 2018 study “From Me to Us: The Emergence of Purpose-Based Brands,” involving more than 30,000 consumers worldwide, 62% of respondents wanted companies to have ties to social, cultural, environmental and political issues close to them. The study also mentioned that they materialized their purchase intentions based on the company’s values and authenticity. Approximately 63% of respondents preferred to buy products and services from companies whose purpose reflects their personal beliefs and values. It does not seem like a good time to “act neutral,” and in today’s world of hyper transparency, keeping a low profile is just as bad.

So, what should companies do to avoid losing competitiveness in this new scenario?

Put who they are into words, what their soul is, what they do and why they are here in a sense that transcends mere business activity. Companies must truly describe their purpose in the world.

Once this is achieved, companies must move from storytelling to story-doing, or taking action. When companies carry out actions that contribute to their purpose, they must proactively and effectively communicate them to different interest groups – always keeping a strategic approach in mind, with the sole objective of enhancing the brand’s reputation.

“Part of Volvo’s purpose is to contribute to a better society, protecting people and the planet. Therefore, by 2025 we expect 50% of our sales to be 100% electric cars”

**Leandro Teixeira**, Marketing Director of Volvo Cars Brazil.



**Mestizo**  
**Consumers**



## Mestizo Consumer

We are faced with consumers who strongly claim their individual identities through the consumption of products and services based on originality. The question here is: are the brands ready to satisfy the identity desires of these new consumers?

This trend stems from the loss of individuality generated by the rapid effects of globalization and by the rather slow emergence of the diversity concept.

According to a study carried out by Irregular Labs in 2018, the acceptance of individuality and of oneself are key concerns for Generation Z. Because of this, products fundamentally based on unique selling points are very attractive for young people wishing to express their own cultural experiences (Stylus Media Group, 2018).

Besides brands, there are other instances in which the “society versus individuality” duality can be seen. An example of this is Rosalía, a young artist who fuses different musical genres, instruments and voices, blurring the limits of purism and achieving an unusual result. Fashion is another example, with Gucci and Versace offering luxury to those who make the eccentricity of this duality an expression of their identity.

2019 will be the year of diversity and activism for design and photography. Expect to see more

photographs of women, races and ethnicities; and an increase in the use of portraits with docile postures. We will also see changes in gender treatment: it will be more relaxed, almost blurring the boundaries between the traditional archetypes of what is feminine and what is masculine.

### In short...

Mestizo consumers openly share their desire to exalt their own identity through consumer experimentation. Brands must face the challenge by satisfying their identity concerns.

How can this be done? 3 key ways:

1. **Betting on personalization processes**, thus avoiding stereotyping. It will be necessary to investigate the individual, both in isolation and in their relationship with society.
2. **Insatiably explore creativity**. Experimenting with what exists and what is new, fusing concepts and transgressing conventions.
3. **Understand the implications of a plural society**, adopting an activist and empathic stance. One way to do this is through appealing alliances that represent traditionally neglected segments of the population.



\_Open Source  
Sustainability\_



## Open Source Sustainability

Consumers are increasingly inclined to prefer brands that can go beyond standard sustainability platforms to achieve relevant impact. Brands are transcending their own limits, adding value and freely sharing their knowledge and technologies to offer effective solutions to numerous problems in today's world.

Various studies and success stories presented throughout 2018 have shown how the average consumer tends to pay more attention to companies that make their initiatives cause a positive impact on the general aspects of human life. The concern for social, ecological and environmental impacts is a triad that allows companies to innovate their brand more and expand their reach.

The beer brand Corona, a brand of the Modelo group in Mexico, in alliance with world organization Parley, proposed the elimination of plastic in its six-pack containers among its global sustainability goals for 2025. This case shows Corona's interest in joining global efforts to reduce consumption of materials harmful to marine ecosystems—in this case, by implementing rings made of biodegradable fibers to help protect ocean species.

These solutions foster a greater connection between consumer and brand by solidifying relationships through a shared common goal. Companies can now differentiate themselves to obtain greater notoriety, especially ones that can extend their impacts to more global causes and create truly transformative initiatives. This is the mechanics of open source solutions, maximizing resources to promote novel ways of providing answers and reaching consumers' minds from a different angle.

Though it is true that the consumer values aspects such as price or offer. The true notoriety of a brand is achieved through the generation of emotional experiences, which contribute to the loyalty and purchase decisions

of consumers. It is here where one must think about products or services from a global perspective; making them transcend beyond the purchase of a good or the use of a service.

Examples:

- The aforementioned Modelo group project could join the Adidas<sup>6</sup> and Parley global initiative of producing shoes made from plastic bottles. Through this, they could achieve a consumer effect that correlates the purchase of sports footwear with an environmentalist behavior, such as promoting recycling and the use of reused materials.
- Dell Computer Aid and Robotix joined forces to create a Solar Lab in Mexico, seeking a different impact on daily life.
- The inter-institutional agreement between Nestlé and 41 other companies to generate youth employment.<sup>7</sup>
- Uber (as a solo project) decided to create "Uber Movement," a platform that collects and processes mobility data in six cities around the world to provide free and open information to all planners and generators of urban public policies.

This is how brands can provide innovative solutions to ethics and sustainability issues, share them to generate new and wider impacts in the world and collaborate with each other to bring about significant change.

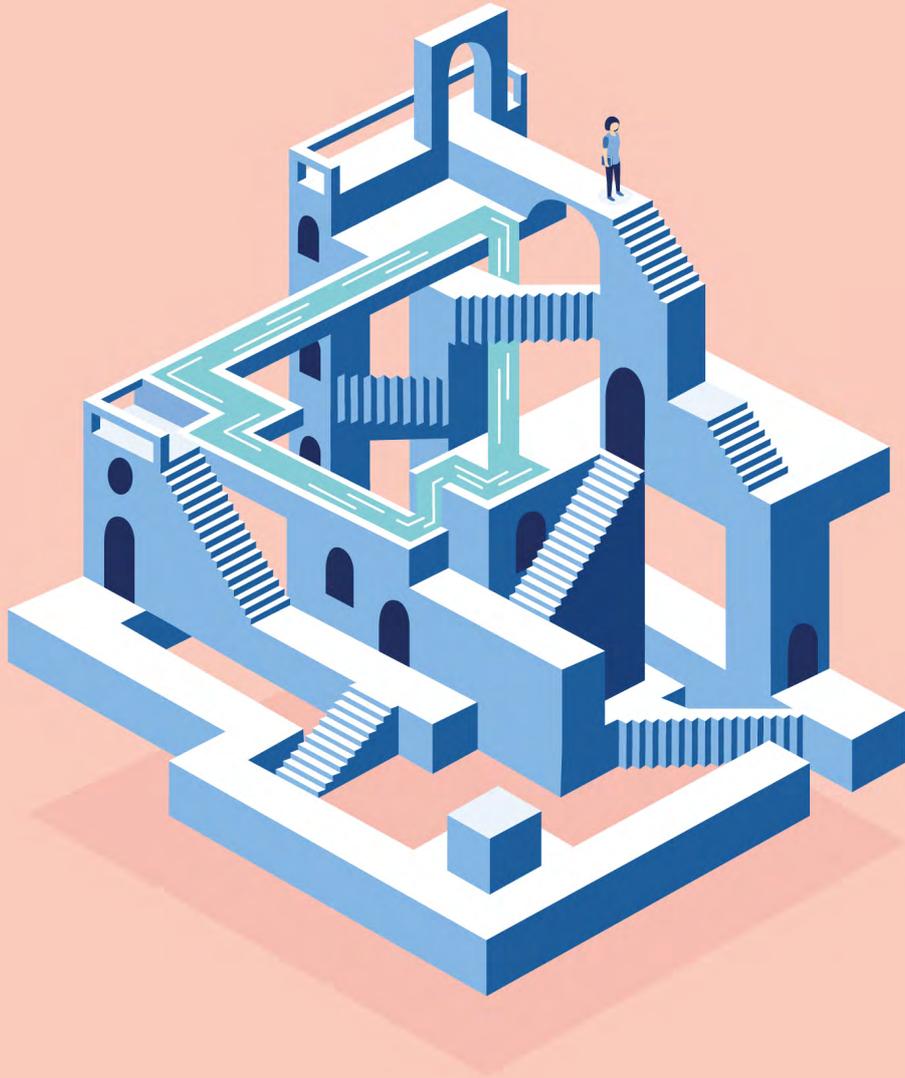
The challenge for brands now is to become **that new** social and environmental actor who has greater recognition and legitimacy among new consumers.

6 <https://www.adidas.co/parley>

7 Acuerdo por la Empleabilidad Juvenil. Nestlé. <https://bit.ly/2QJVCrt>

*The progress of initiatives that impact the future development of society, in relation to its needs and expectations, is vital to strengthen our role as an actor that leads the sustainable growth of our communities*

**Martha Arbelaez**, Marketing and Communications Director of Nestlé Colombia.



NEW  
ADULTS



## New Adults

The concept of adulting has changed in recent years. What our grandparents consider “an adult” is not the same for 30-year-olds, let alone 20-year-olds. We’re living in a post-demographic world full of more diverse and more complex lifestyles.

Changing social attitudes, converging economic pressures and several other factors have changed how people view, understand, and cope with adult life. Nowadays, post-demographic consumers are actively looking for brands that teach them life skills, allow them to outsource daily tasks and help them discover their personal goals. After all, being an adult in 2019 will not be an easy task.

People are adapting to a not-yet-defined lifestyle that does not follow traditional social norms. The ultra-observed millennials are the “new adults” of this generation and face challenges with very different perspectives from previous generations. These new adults are immersed in various consumption models that affect (and resolve) their daily lives, such as remote work, services that respond to the collaborative economy, the development of e-commerce and so on.

This is because these new consumers are constantly seeking to convert their pressures and responsibilities into something easier to manage as a means of achieving greater flexibility for their time. Brands and companies can serve as a resource to “facilitate” the day-to-day life of these generations through new tools, products, services, experiences and consumption models. It is brands that, in a way, can help them live without so much pressure.

An example of this type of flexibility can be seen in coworking spaces (a working model that has become popular in recent years), which allows professionals to share the same workspace with others. Another example is the business model offered by companies such as Cabify, the Spanish international transport networks company, which connects users with vehicles through a mobile application. Revolutionizing transport is one of the elements that contributes to the construction of this new adult age. New adults, when faced with the complexity of the environment, will seek the facilities of immediacy and disruption offered by technology.

*Coworking spaces give you the possibility of connecting with other professionals and entrepreneurs. This model seeks to create a sense of ‘community’ and foster constant exchange between professionals, enriching work, performance, and work wellbeing*

**Pablo Cardozo**, Community Manager and Ally of AreaTres Work Place.



RETHINK 'SOCIAL'



## Rethink “Social”

It's hard to imagine what our lives would be like nowadays without tech devices...

Whether it is to interact on social media, shop, cook, order food, check our account balance or even acquire a public service - new generations are constantly surrounded by screens that intuitively provide them with information in different formats. Saturation levels have reached a point in which our own iPhones and social media are telling us weekly screen-time rates and offering us a means to decrease their usage.

Our dependence on technology is becoming alarming—the question is: should we be blaming brands for it? Brands provide us with unparalleled convenience and comfort when paired with on-demand technology, such as the [Amazon Echo](#). Because of this, we have become an indoor generation, [spending over 90% of our lives indoors](#), preferring to socialize and mingle with our friends through technology.

To keep up with generational trends, brands are integrating technology in their buying and selling processes, as well as using it as a mediator to reach consumers and create a “WOW effect.” Virtual reality is one of the trends that brands have been exploring in recent years, using it to achieve more immersive experiences and enhance their storytelling.

Whether it is for entertainment purposes such as MEO's [360 television experience](#), or [PlayStation's](#)

[ultra-realistic VR](#), such a high degree of engagement with brands can cause consumers [to adopt antisocial behaviors](#). The latter applies to augmented reality and artificial intelligence devices: Tesco allows consumers in Europe [to order products on the subway through a QR code](#), L'Oréal lets consumers test [products without going to a physical store](#) and TAP answers questions through [virtual assistants](#). *The “new face of technology” can be synonymous with the fact that we will not need to physically interact with humans in the future.*

Lo mismo ocurre con la realidad aumentada y con los dispositivos dotados de inteligencia artificial. Mientras Tesco nos permite [encargar productos en el metro a través de un QR code](#), L'Oréal nos ofrece la posibilidad de probar [productos sin ir a los hipermercados](#) y TAP responde a nuestras preguntas a través de [asistentes virtuales](#). Las nuevas caras de la tecnología pueden ser sinónimo de que en el futuro no tendremos la necesidad de interactuar con colaboradores o solicitar servicios personalizados en una tienda física.

Brands provide consumers with infinite options to experience technology, but such experiences must be used responsibly to guarantee the psychological well-being of generations to come. In 2030, it is estimated that [80% of all customer contact will be made through artificial intelligence](#). That is too much. Fortunately, we still have time to think of new reforms and initiatives alongside brands to help consumers invest in the troublesome area of social (dis)connection.

*“The issue of social isolation, or mass consumption of technology instead of personal contact, is of particular importance in the relationship between brands and their customers. There is no doubt that contact through digital platforms is very effective from a coverage point of view but it's also ultimately up to brands to distance their target audiences from technological isolation, and provide them with emotional experiences only available through human contact”*

**Ricardo Tomaz**, Strategic Marketing and External Relations for SIVA.

# Reputation Management, Communication and Public Affairs

## Leader in Spain, Portugal and Latin America

LLORENTE & CUENCA is the **leading public relations, communications and reputation management consulting firm in Latin America, Spain and Portugal**. It gathers **20 partners** and **more than 600 professionals** who provide strategic consultancy services to companies from all sectors with operations in Spanish- and Portuguese-speaking countries.

With offices in **Argentina, Brazil** (Sao Paulo and Rio de Janeiro), **Colombia, Chile**, the **Dominican Republic, Ecuador, Mexico, Panama, Peru, Portugal, Spain** (Madrid and Barcelona), and **the United States** (Miami, New York and Washington, DC). It also operates in Cuba and offers services through partner agencies in Bolivia, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Paraguay, Uruguay and Venezuela.

LLORENTE & CUENCA has won several awards for its client reputation and business results, including **Communication Consultancy of the Year in Latin America** in the 2018 International Business Awards and in the 2018 Latin American Excellence Awards.

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