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REPORT

**ESPORTS:
CONQUERING
THE CONSUMERS
OF THE FUTURE**

Madrid, October 10, 2019

In Spain, while most citizens are sleeping in the early morning light, thousands of people have stayed up all night to watch video games. For example, during Fornite PRO-AM 2018, more than 350,000 Spaniards decided to stay awake to watch a tournament that hit several records.¹ During the last IEM Sydney, about 45,000 people logged in from Spain to follow the best CS:GO players.² While surprising for those looking in from the outside, the data reinforce an undeniable trend: The video game industry, especially that of esports (which are amateur or professional video game competitions, watched live), has enjoyed a near-exponential hike in recent years—and growth forecasts are even better in the immediate future.

In its last “White Book on Esports in Spain,”³ the Spanish Video Game Association found the total national viewership for this kind of event at 5.5 million, with estimates for an increase of up to 7.3 million over the next two years. For reference, this would entail reaching almost 20 percent of the Spanish online population. These overwhelming data have turned Spain into one of the European superpowers in the field, making esports an area of interest for dozens of brand sponsorships. Their contributions have definitely launched the industry into a new stage in its development.

A couple of years have gone by since the first brands— called “endemic brands” due to their natural connection to the digital and technological

¹ 350,705 single viewers tracked between 00:30 and 3:30 a.m. on June 13, 2018, as per data provided by the Professional Video Games League

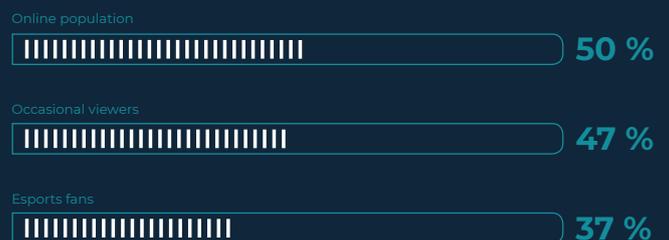
² <https://about.eslgaming.com/blog/2019/05/iem-sydney-sets-new-australian-viewership-record> (data on Spain provided by ESL Spain)

³ White Book on Esports in Spain (*Libro blanco de los esports en España*). Available at http://www.aevi.org.es/web/wp-content/uploads/2018/05/ES_libroblanco_online.pdf

SPAIN



HIGH HOUSEHOLD INCOME (GLOBAL)



Internationally speaking, typical esports fans are adult men between 21 and 35 years old who work full time, have a medium-high household income and consume much more content via online platforms than through any other communications channel. In Spain, enthusiastic esports fans have a wider age range, but their elusive profile and reluctance to use traditional media make them equally difficult for major brand sponsors to reach.

worlds—started earmarking part of their budgets for video game competitions. In recent times, increasing online viewership and younger generations' tendency to use nontraditional media—youth between 13 and 24 consume less TV in Spain and are watching it less and less as time goes by⁴—have generated a new wave of sponsors known as “non-endemic.” These come from sectors as varied as the food, finance and automotive industries.

“Esports is a young, digital, global and diverse area, making it very appealing to businesses”

**Néstor Santana,
MAPFRE**

The gradual arrival of non-endemic sponsors to Spain is marking the end of esports “teenage years” as an industry, while also posing a series of challenges that could hinder its development. This is especially true in areas such as regulation, the overestimation of future perspectives and measuring brand ROI. Similarly, challenges such as the generational gap between senior executives and most digital viewers, insufficient female involvement and the violence present in video games still create entry barriers that the sector must overcome in the future years, if it really intends to not only increase the number of big sponsors, but also be sustainable.

The current report stresses the weight brands should place on how they become involved in esports and how they can build a story that enables them to effectively fit into an environment

full of challenges to traditional marketing methods. We hope key Spanish sponsor and esports league perspectives on the current industrial scenario, as well as their uncertainties and predictions for the coming years, will help them find the Holy Grail all brands pursue: Conquering both present and, above all, future consumers.

THE CHOICE OF ESPORTS AND SPONSOR CONTRIBUTIONS

The common denominator among brands now venturing into the world of esports is the personality of their viewers. The typical esports viewer can be profiled as male, between 21 and 35, with leisure habits that take him far from traditional media. He does not listen to the radio or watch TV, and he is prone to getting information through social media and online content. These traits make this audience hard to reach, which is where esports come into play.

Ander Perez and Guillermo Manas are responsible for esports sponsorship at Telefónica and Movistar, respectively. Perez explains why the combination of elements found in esports offers an absolute edge for Telefónica, saying, “Connectivity, entertainment, youth and technology are all elements that turn it into an ideal realm for Telefónica. In the field of esports, connectivity providers supply the gaming field. We hardly ever enjoy such relevance. If we add our mission, which is to make the world more human by connecting people’s lives, into the mix, it becomes a natural environment for brands like ours to develop our visions and improve our relationships with this unique audience.”

Nestor Santana, responsible for Big Cities Innovation at insurance company MAPFRE, is of the same opinion as Telefónica. He describes esports as a “young, digital, global and diverse” area, making it very appealing to businesses (like this insurance company), as it enables them to innovate and develop new products. However, MAPFRE does not see itself as a sponsor; rather, they feel they have approached the segment

⁴ TV SGAE 2018 Yearbook (*Anuario TV SGAE 2018*). Available at http://www.anuariosgae.com/anuario2018/anuariopdfs/07_TV.pdf



from a business perspective. “We first focused on understanding the challenges present in this ecosystem, identifying its needs and circumstances and determining how an insurance company could offer value or solutions,” said Santana. “We believe this is possible because insurance must be a part of every business model. You cannot develop any entrepreneurial activity past a certain level without an insurance company to cover your risks.”

Nonetheless, everyone in the field agrees there is a need to improve the professionalism of those involved, from players to executives—including sponsorship managers, press officers and institutional relations directors. To that end, the arrival of major brands is key, since their experience in other environments, such as sports or music, is slowly bringing security and improving communications with sponsors. It is worth recalling that, today, sponsorships and advertising account for the main income earned by esports clubs and competition organizers.

“In this field, people are very grateful if brands work respectfully and try to contribute to their growth”

**Ander Pérez,
Telefónica**

“This industry is getting started, and the involvement of sponsors such as Telefónica brings it to another level,” Perez reflects. “It reinforces and strengthens it. Before, esports was uncharted territory, but the entry of a

brand like ours encouraged others to explore it as well. However, it is essential companies enter this area respectfully, to earn legitimacy. That is to say, they must identify people's demands and work to satisfy them. If you work well, it is a field where people are very grateful, and their brand connections are unshakeable."

In the case of MAPFRE, from the very beginning they knew their role as a brand could help the industry "make the leap to a more professional level in every sense." In the words of Santana, "We realized it was essential to bring in knowledge from the insurance sector. We are eager to contribute our insurance expertise to help this ecosystem bloom. It's all about getting a win-win."

A UNIQUE SECTOR

Once a brand—endemic or not—decides to join forces with the esports sector by sponsoring its teams, leagues or players, it dives into an environment that is extremely novel for professionals seasoned in more traditional arenas. Unlike more mature spheres, the newborn esports area is still building its basic structures in Spain, including consistent regulation or an agreed-upon system for the oversight and accreditation of viewership figures.

Alejandro Sanchis, Esports digital expert for Mahou-San Miguel, describes it as "a teenage field, one still maturing and lacking a lot of experience and stability." According to Sanchis, this explains its short-term uncertainty; for instance, no one is certain how long a video game will remain on the market, or whether the next release will be successful enough to make players want to watch others in live games.

"It is also a field that, in many cases, is managed by very young people with extensive knowledge of the field, but who lack professional expertise," Sanchis expressed. "In turn, there are people with vast experience in other fields, but who lack knowledge of video games and esports. Sometimes, brands find themselves in a no man's land, because the industry has not yet reached enough a maturity for certain professions to become established and settled. Esports, as a sector, must develop a track record."

In addition to its huge difference from other arenas, such as sports, music or gastronomy, esports **has an owner**. The publishers—that is, the companies that develop and own each video game—hold the key to the entire ecosystem, since they enjoy total authority and all rights over their products. The publishers may freely change any aspect of their games, from internal rules to competition regulations.

"The balance between teams, leagues, publishers and brands... is complex"

**Alejandro Sanchís,
Mahou-San Miguel**

Some publishers do not allow any kind of advertisement within or around their games," explains David Peinado, Business Development executive for the Professional Video Game League (*Liga de Videojuegos Profesional, LVP*). "It is important to remember that in esports, someone 'owns the ball,' so as to speak. Each video game is a work of intellectual property whose owner's authorization is key to everything. That said, most publishers do not ban, for example, brand mentions by casters (who narrate the games) or the actual windows for each competition."

The authority publishers enjoy grants them certain privileges that must be respected. There are copyrights in music, but no one owns opera or rock, just as no one owns soccer, classical theater or traditional cooking. This means esports are continuously changing, and this does not always benefit brands. "When the LVP organizes a video game competition, we need to have the publisher on board," Peinado tells us. "Sometimes we set up the competition and get the sponsors, then, for some reason, the publisher changes their strategy out of the blue and decides we cannot go on, canceling the competition even though brands have already been engaged."

“In esports, someone ‘owns the ball.’ Each video game is a work of intellectual property whose owner’s authorization is the key to everything”

**David Peinado,
LVP**

Sanchis expands on the explanation. “Publishers can do whatever they want with their product, so there is no clear legal framework to turn to,” he says. “This has pros and cons: there is more flexibility, but also less certainty. You need to continuously adjust. I can plan to close on certain big events because I know they will happen, but I cannot generate a concrete activation concept in this arena because, in just a couple months, a video game may change or people may stop liking it, for example.”

How, then, can brands manage this scenario? According to Sanchis, “the balance between teams, leagues, publishers and brands... is complex, because each one may be interested in something different. It is a peculiar ecosystem that

I have never seen anywhere else. For instance, some publishers charge teams a percentage of the sponsorships related to their game. Others prevent certain brands from getting involved with their game, or manage team image rights. The opposite also occurs, with some allowing full freedom so anyone can use their license. The more successful the game, the more controlling the publisher—which is normal, as they have to protect their product and growth. So, brands have to approach each publisher differently and try to find a common vision so they can collaborate.”

GOALS REACHED

The phrase “what cannot be measured cannot be managed” has become an aphorism in the marketing world. The inherently digital nature of esports means measurement is at your fingertips, which makes it easier for most brands present in the industry to be satisfied with their results. However, there are also examples of companies that have given up, unable to understand and tap into this changing and unstable world.

The types of basic goals set by sponsors—brand visibility, positioning and/or increased business—are closely linked to the fields where they belong. Such is the case of food delivery companies, which find fertile land for direct sales among video game viewers; telecommunications, peripheral and IT equipment companies, which seek to ensure users witness or even experience the quality of their products; and, with its recent arrival, finance corporations, which typically look to build their brand among new audiences, attempting to attract new customers with specific products targeting them.

PRESS START

ESPORTS INDUSTRY ACTORS



PUBLISHERS

Hold the IP and industrial property rights for video games and franchises.



ORGANIZERS

Design and organize video game competitions.



CASTERS

Broadcast games live or as-live.



PLAYERS

Participate in the competitions.



TEAMS

Made up of groups of players, often hired by companies, who participate in competitions.



SPONSORS

Provide advertising and sponsorships during the competitions. Profits in video games competitions come mostly from these sources.



BROADCASTERS

Have platforms to distribute AV content live, on-demand and online.



OTHER STAKEHOLDERS

Consultancy companies, agencies, Universities/education centers and Tech companies.



However, although the main goals are being reached, there is a certain consensus among sponsors on which direction to take. Big data applied to digital marketing or for precision is far from being embedded into esports, despite the existing opportunities. To date, basic indicators—such as content visualization, pages seen or brand recognition surveys—remain the hallmarks on which result evaluations are based.

Alberto Martín, Sales and Sponsorships director for the Electronic Sports League (ESL), discourages brands from using esports like they do traditional media, because “our viewers are very demanding in terms of what they consume. They are not used to advertising and have the ability to respond negatively in real time. They usually employ ad blocks, and hence do not like being ‘forced’ to watch ads on other channels either. In esports, you need to be creative to win over the users.”

“In esports, you need to be creative to win over the users”

**Alberto Martín,
ESL**

The LVP’s Peinado acknowledges that, quantitatively, esports currently ‘sells’ viewership and brand impressions, which entails a certain risk; their followers are expert online users, and thus, professional banners. This means they will discard intrusive advertising and use ad blockers to avoid it.

“The key,” Peinado states, “is qualitative. There is room for improvement, but the level of engagement you get with esports is very high. If a brand has clear goals and KPIs, we have the ability to make it successful using many formulas, or even create specific products for each brand. However, sometimes sponsors are not that clear on these elements or have not invested in activating their sponsorship, thus entrusting the teams or leagues with their success.”

“We are incredibly fortunate to be witnessing the birth of an entirely new entertainment industry”

**Néstor Santana,
MAPFRE**

What seems clear is that most brands are no longer content with just seeing their logo connected to video games. Santana, from MAPFRE, is one step ahead in satisfying present and future sponsors in the field of esports. “We must understand that media value alone is not enough,” he states. “But we are not looking for a traditional sponsorship model either. We need more tools and new outlooks to help brands better fit into and bring more value to esports. The companies that make up esports should be as ambitious and disruptive as the brands themselves. We are incredibly fortunate to be witnessing the birth of an entirely new entertainment industry, and the companies willing to be part of this ecosystem have much more to contribute than just their sponsorships.”

Of course, technologies such as big data and blockchain are part of the conversation, as they offer endless possibilities ranging from payment cybersecurity to the fight against piracy and black market purchases. Peinado has no doubt that “all of this will eventually be developed, although it is still not being worked on at a high level. This is reasonable, since thus far we have focused on the product—on improving it, caring for our viewership and improving their experiences. At the LVP, we have a platform with half a million people registered, including their full names, data, preferences, etc. We manage more than 1,500 games a day. It is a very specific and varied target audience, but one for which we have a colossal amount of clean, usable information, with very accurate and high-quality data. This is utterly invaluable for brands, and we are already working on how to tap it.”

WOMEN, VIOLENCE AND MINORS... THE BIG CHALLENGES

From the outset, the esports industry has had to deal with certain accusations that, little by little, are being put aside as clichés. Criticisms regarding violence in some video games or the sedentary and unhealthy lifestyle that they purportedly cause have now been left behind, though every now and then they come back as one of the fears that haunt brand executives.

The mass presence of minors is not considered a risk in and of itself, since there is another multitude of entertainment options that target teenagers and children. However, brands with alcoholic products must naturally tread lightly in this arena, just as in many others. According to Sanchis, this is no reason for alarm. "San Miguel sponsored Team Heretics, whose viewership is 15 percent underage," he noted. "This is very similar to Atlético de Madrid or Real Madrid, so this is not uncharted territory for us. We are very controlled in this regard, and we are not worried because our internal rules are more stringent than the law itself."

Nowadays, macho-culture and lack of female viewers are probably two of the main battles to fight. Based on a study of its own viewership, conducted March 2019,⁵ the ESL estimated that women only accounted for 9 percent of those watching their games. As explained by the company, though the percentage is meager, it represents an almost 300 percent increase over the past year, and it was accompanied by another hopeful figure for gender equality: More than 80 percent of fans prefer mixed leagues over those differentiated by gender.

Martin, from ESL, believes the esports sector as a whole should work to appeal to women before it is too late. "There are environments related to esports, such as gaming or influencers, where women are much more relevant," he shared. "We must try to use these tools to interest women in esports, thus generating wider attraction for our shows and encouraging them to become loyal followers of our competitions."

There have been several recent efforts to set up female teams—such as the Movistar Riders Blue team—and there is frequent news coming out on possible female-only competitions. Martin highlights that neither ESL nor any other major league imposes any restrictions based on gender to compete. "Female teams or leagues may serve to create new opportunities for the competitive female population, and thus may increase the number of female players," he stated. "Nevertheless, esports enable men and women to play on equal footing, and I believe we should continue to enhance that." aconseja Alberto.

“We must use gaming and influencers to interest more women in esports”

**Alberto Martín,
ESL**

"This is a key area," agrees Santana. "In MAPFRE's leadership program, we wanted to include esports as a lever to raise awareness of new digital careers among girls between 10 and 14. Since it is a totally digital and different industry, we thought it would be very interesting for girls to meet women working in various departments within esports. It was an amazing experience for them, and it was very well received."

Like Santana, Sanchis (from Mahou-San Miguel) believes a lot is being done to ensure female players are respected and women are incorporated at every level. "You do find some macho behaviors in gaming, and although there are very few cases, they generate a very negative general image. In professional esports, lack of respect and 'trolling' are really infrequent. What we do notice is that the

⁵ III ESL viewership study. Available at https://esports.as.com/industria/III-Estudio-audiencia-esl-movistar-esports_0_1225977391.html

role of women is growing, especially thanks to games such as Fortnite, which has largely democratized the scene.”

Concerning violence in games, Sanchis states that “this matter has been left well behind,” something Perez, from Telefónica, supports. “Violence is present in the news, in movies, etc.,” he states. “When a brand approaches esports, violence often generates some reluctance. It even happened to us at the beginning! But then you realize that what players execute is a strategy. There is one team playing against another to win, and that is what attracts viewers—not the fact that the game is about shooting.”

“In professional esports, lack of respect and ‘trolling’ are really infrequent”

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Mahou-San Miguel**

Player health habits are more controversial. The World Health Organization (WHO) included video games on its list of addictions,⁵ and the significant presence of fast food brands among sponsors can unleash some strong opinions. However, Sanchis believes “it has also been overcome... This is a generation that may consume unhealthy products, but they are very aware of what is healthy, and playing esports does not mean that they do not play physical sports or eat other foods.”

Conversely, Santana believes there is still a lot of work to be done, and that the input of MAPFRE, including its health insurance, may help the industry. “We want to foster healthy habits in esports, with specific actions and awareness-raising efforts, because we see a lot of talk about it, but no concrete action,” he stated. “We want to lead that field.”

THE FUTURE: BROADCASTING RIGHTS

So, where is the esports industry going? There are two key ideas—probably intertwined—that will shape its fate in the years to come: Sustainability and broadcasting rights. Today, video game tournaments are open and free, so the teams’ and leagues’ economic backbones chiefly rely on sponsorships. Even the monetary awards given in the best competitions are usually supplied by sponsors.

Currently, other sources of income, such as merchandising or tickets, cannot reach the same level as brand contributions. This dependency has forged a changing backdrop, with teams rapidly coming up and leaving the scene, some players participating for just a few months and viewership figures that do not always match reality.

Does this mean esports are unsustainable? Manas, from Telefónica, says “in a very short time, endless participants, teams, leagues, etc. have appeared, because it’s a very attractive arena. Thousands of people attend some of these events in person—so many that any brand would say ‘I want that audience too.’ But then you need to understand the county where you are located, the actual possibilities and the true viewership for each game. Many people will likely leave the sector and, little by little, a rational order will be established. The industry will self-correct.”

“It is also necessary to rationally analyze what is going on, because esports are not a monolith; one game is not the same than another,” he added. “Thus, we can discuss it as a bubble in the sense that it is a unique field. It is currently booming and attracting a lot of attention, with vertiginous international figures, but that does not mean that it will stop growing. There is still a lot to do, especially in Spain.”

According to Martin, “It’s undeniable that some teams are economically limited, because their investments have been too ambitious. The goal of getting to the national or international elite in the short-term is certainly a big and complex

⁵ <https://www.europapress.es/portaltic/videojuegos/noticia-oms-incluye-oficialmente-trastorno-adiccion-videojuegos-20190527141344.html>

challenge. I don't think it is a bubble; it is part of a sector that is growing exponentially and requires continuous adjustments."

"Our figures refute the existence of a bubble," states Peinado from LVP, "although it is true that there has been reckless growth in recent times. Such rapid acceleration may give the impression of a bubble, but it is not something that will disappear tomorrow. This is the future, not because those working in the industry say so, but because it is what new generations want—and what they show us with their consumption habits. The 'bubble' idea is one of the biases against esports, and we need to work to eliminate it."

Figure wars are another symptom that reflects the sector's instability, since unchecked numbers are sometimes announced solely to highlight a perhaps wishfully high increase in viewers. According to the AEVI 2018 Yearbook, Spain's

video game industry invoices twice as much as music and cinema together,⁷ so sometimes the reach of video games and professional competitions' viewership are mixed. "There's talk about very high figures, which sometimes are not actually that high," says Sanchis, from Mahou-San Miguel. "This means there is, indeed, a considerable bubble in terms of investment, and it does not benefit the industry, because some participants make unreasonable proposals. And, of course, some investors believe it is a good opportunity, then later realize their expected returns were not right. That might be one of the main issues—very few agents in this field have healthy accounts."

To become a financially sustainable industry, esports participants are looking to other similar areas in terms of their structures, but that have ten-year track records. Everyone has thought of a solution, but not so much of how to achieve

⁷ "The Spanish Video Game Industry. 2018 AEVI Yearbook. (*La industria del videojuego en España. Anuario AEVI 2018*". Available at http://www.aevi.org.es/web/wp-content/uploads/2019/05/AEVI_Anuario_2018.pdf



it: Going from “totally free” to “pay per view” attendance. That is, for the purchase and sale of broadcasting rights to become a reality as soon as possible. In fact, there are some youtubers who already charge small amounts of money to access special content and some publishers have ongoing OTT (Over The Top) projects to broadcast their international competitions online.

However, Spanish esports companies—whether teams, leagues or publishers—do not have enough viewers to charge users for their content and streaming. In ESL, according to Martin, they have been analyzing this type of option for some time, but the time for it has not yet come. “In Spain, the volume is still not that big,” he said. “This means broadcasting rights for competitions still do not have a defined value, so they are unpaid. When we evolve toward payment models, the teams and the industry as a whole will see very considerable gains in profit, and then we will be able to discuss it as a mature sector.”

“Pay per view would be the solution for esports to become truly sustainable, but the structure is still lacking”

**David Peinado,
LVP**

Peinado, from LVP, believes “pay per view would be the solution to ensure esports became truly sustainable, but an organic structure for payment is still lacking. What is clear is that the ecosystem is not sustainable with brands alone, but it is not possible to go straight from 100 percent free to everything costing money. We should start by working on ‘micro-payments’ in exchange for premium content, just like in video games. Once

that idea is embedded, we could start thinking of paying for broadcasting.”

Although esports have been basically free from the outset, their fans are used to paying small amounts in exchange for skins or improvements on video game characters. Nonetheless, the model is not simple, as other sports’ models (such as soccer’s) are not applicable. Esports includes many different games, each with different audiences and uncertain lifespans. Furthermore, they are always subject to the final authority of publishers, who, in many cases, do not wish to charge for watching games so as not to restrict the visibility of their products. “There is no solution,” fears Perez, from Telefónica. “If a publisher sells the rights, but, for instance, reserves an open window to retain visibility, it would be harder for operators to capitalize on it... In that sense, it will be difficult to move esports from where it is currently standing.”

CONCLUSIONS

All in all, today’s esports arena is an undeniable marketing option for most companies, although how they handle the sector’s unique characteristics will determine their degree of success and return on their efforts and investments. Telling a relevant story in line with the viewership’s expectations—and innovating with flagship projects and actions that tap into the digital world’s idiosyncrasies—is certainly the best recipes to creating the kind of effective, efficient discourse that can permeate a reluctant audience.

However, there are still concrete steps that must be taken to ensure the sector’s soundness. Viewer profiles and consumption habits make esports a channel that is difficult to match for the purpose of approaching an audience that despises the kinds of advertisements and media their parents like. However, over the coming years, esports’ spectacular and continuous growth must be reinforced with a drive toward organization and professionalization in the industry, which still needs to find a way to become economically sustainable. Future broadcasting rights, still far in the distance in Spain and for which an adequate model remains to be found, are perceived as the most suitable approach—with games remaining under the umbrella and authority of publishers.

“If a publisher reserves an open window to retain visibility, it would be harder for operators to capitalize on it”

**Ander Pérez,
Telefónica**

Although esports still suffer from few girls and women, old concerns around violence and healthy habits seem to have become, little by little, a matter of the past. Nonetheless, regulation, data clarity and innovative proposals to benefit from an environment that combines the physical and digital worlds are still challenges on the short-term agenda.

Esports also faces the problem of showcasing its industry characteristics while explaining the distinctive traits of its various games and, thus, the consequences they pose for sponsors. Esports is not a homogeneous or uniform arena, but rather an ecosystem that, like others, such as music or sports, is built from many similar (but still quite distinct) parts. As a whole, however, esports offer brands the most innovative and promising opportunity in today's digital world, in addition to a magnificent chance to conquer the next generation of consumers.

AUTHORS



David González Natal. Senior Director of the Consumer Engagement área at LLYC in Madrid. David earned a bachelor’s degree in journalism from the Complutense University of Madrid and Global CCO from ESADE. He has worked for media such as El Mundo and Cadena Ser, and in the press department of the cultural organization Círculo de Bellas Artes in Madrid. Before heading the Consumer Engagement area in LLYC, he directed national communication campaigns for brands such as Heineken, Red Bull, Movistar and Ron Barceló for seven years as Senior Coordinator at the Actúa Comunicación agency. As global manager of the area, he coordinates eight markets in LLYC and has directed emblematic projects for Campofrío, Coca-Cola, Telefónica, Gonvarri, Bezoya and Sacyr. He has received more than 50 awards for his projects, including a Cannes Lions award and numerous Gold Stevie Awards. Natal is a storytelling lecturer for many national master’s programs.



Nacho Tena. Communication Consultant. A communications and sponsorship management specialist with extensive international experience, he served as the director of Sponsorship and Content Communication for BBVA Group between 2009 and 2018. During this time, he supported major global projects such as the Liga BBVA, NBA and restaurant El Celler de Can Roca. Previously, he was the Brand, Marketing and Communications director for Deloitte in Latin America and the Caribbean, a role he earned after working in the media in Spain, the United States and Colombia for almost a decade. In addition, he spoken about sponsorship management, corporate communications and brand management for numerous postgraduate courses, conferences and institutions.

MANAGEMENT TEAM

José Antonio Llorente
Founding Partner and Chairman
jalloriente@llorenteycuenca.com

Alejandro Romero
Partner and CEO Americas
aromero@llorenteycuenca.com

Enrique González
Partner and CFO
egonzalez@llorenteycuenca.com

Adolfo Corujo
Partner and Chief Strategy and
Innovation Officer
acorujo@llorenteycuenca.com

Nazaret Izquierdo
Chief Talent Officer
nizquierdo@llorenteycuenca.com

Juan Pablo Ocaña
Director, Legal & Compliance
jpocana@llorenteycuenca.com

Daniel Fernández Trejo
Director, Technology
dfernandez@llorenteycuenca.com

José Luis Di Girolamo
Partner and Global Controller
jldigirolamo@llorenteycuenca.com

Antonieta Mendoza de López
Vice President, Advocacy LatAm
amendozalopez@llorenteycuenca.com

SPAIN AND PORTUGAL

Arturo Pinedo
Partner and Managing Director
apinedo@llorenteycuenca.com

Luisa García
Partner and Managing Director
lgarcia@llorenteycuenca.com

Barcelona

María Curya
Partner and Managing Director
mcurya@llorenteycuenca.com

Óscar Iniesta
Partner and Senior Director
oiniesta@llorenteycuenca.com

Muntaner, 240-242, 1º-1ª
08021 Barcelona
Tel. +34 93 217 22 17

Madrid

Joan Navarro
Partner and Vicepresident,
Public Affairs
jnavarro@llorenteycuenca.com

Amalio Moratalla
Partner and Senior Director,
Sport and Business Strategy
amoratalla@llorenteycuenca.com

Iván Pino
Partner and Senior Director,
Digital
ipino@llorenteycuenca.com

David G. Natal
Senior Director,
Consumer Engagement
dgonzaleznl@llorenteycuenca.com

Paco Hevia
Senior Director,
Corporate Communication
phevia@llorenteycuenca.com

Jorge López Zafra
Senior Director,
Financial Communication
jlopez@llorenteycuenca.com

Lagasca, 88 - planta 3
28001 Madrid
Tel. +34 91 563 77 22

Lisbon

Tiago Vidal
Partner and Managing Director
tvidal@llorenteycuenca.com

Avenida da Liberdade nº225, 5º Esq.
1250-142 Lisboa
Tel. +351 21 923 97 00

UNITED STATES

Erich de la Fuente
Partner and Chairman
edela Fuente@llorenteycuenca.com

Mike Fernandez
CEO
mikefernandez@llorenteycuenca.com

Miami

Claudia Gioia
SVP Americas,
Business Development
cgioia@llorenteycuenca.com

600 Brickell Avenue
Suite 2020
Miami, FL 33131
Tel. +1 786 590 1000

New York City

Gerard Guiu
Director, International Business
Development
gguiu@llorenteycuenca.com

3 Columbus Circle
9th Floor
New York, NY 10019
United States
Tel. +1 646 805 2000

NORTH REGION

Javier Rosado
Partner and Regional Managing
Director
jrosado@llorenteycuenca.com

Mexico City

Juan Arteaga
Managing Director
jartega@llorenteycuenca.com

Rogelio Blanco
Managing Director
rblanco@llorenteycuenca.com

Av. Paseo de la Reforma 412
Piso 14, Colonia Juárez
Alcaldía Cuauhtémoc
CP 06600, Ciudad de México
Tel. +52 55 5257 1084

Panama City

Manuel Domínguez
Managing Director
mdominguez@llorenteycuenca.com

Sortis Business Tower
Piso 9, Calle 57
Obarrio - Panamá
Tel. +507 206 5200

Santo Domingo

Iban Campo
Managing Director
icampo@llorenteycuenca.com

Av. Abraham Lincoln 1069
Torre Ejecutiva Sonora, planta 7
Suite 702
Tel. +1 809 6161975

San Jose

Pablo Duncan - Lynch
Partner and Director
CLC Comunicación | Afiliada LLYC
pduncan@clcglobal.cr

Del Banco General 350 metros oeste
Trijos Montealegre, Escazú
San José
Tel. +506 228 93240

ANDEAN REGION

Luis Miguel Peña
Partner and Regional Managing
Director
lmpena@llorenteycuenca.com

Bogota

María Esteve
Partner and Managing Director
mesteve@llorenteycuenca.com

Av. Calle 82 # 9-65 Piso 4
Bogotá D.C. - Colombia
Tel. +57 1 7438000

Lima

Luis Miguel Peña
Impena@llorenteycuenca.com

Av. Andrés Reyes 420, piso 7
San Isidro
Tel. +51 1 2229491

Quito

Carlos Llanos
Managing Director
cllanos@llorenteycuenca.com

Avda. 12 de Octubre N24-528 y
Cordero - Edificio World Trade
Center - Torre B - piso 11
Tel. +593 2 2565820

SOUTH REGION

Juan Carlos Gozzer
Partner and Regional Managing
Director
jcgozzer@llorenteycuenca.com

Sao Paulo

Cleber Martins
Partner and Managing Director
clebermartins@llorenteycuenca.com

Rua Oscar Freire, 379, Cj 111
Cerqueira César SP - 01426-001
Tel. +55 11 3060 3390

Rio de Janeiro

Daniele Lua
Executive Director
dlua@llorenteycuenca.com

Ladeira da Glória, 26
Estúdios 244 e 246 - Glória
Rio de Janeiro - RJ
Tel. +55 21 3797 6400

Buenos Aires

Mariano Vila
Managing Director
mvila@llorenteycuenca.com

Av. Corrientes 222, piso 8
C1043AAP
Tel. +54 11 5556 0700

Santiago de Chile

Francisco Aylwin
Chairman
faylwin@llorenteycuenca.com

Magdalena 140, Oficina 1801
Las Condes
Tel. +56 22 207 32 00



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