

**LLYC IDEAS**

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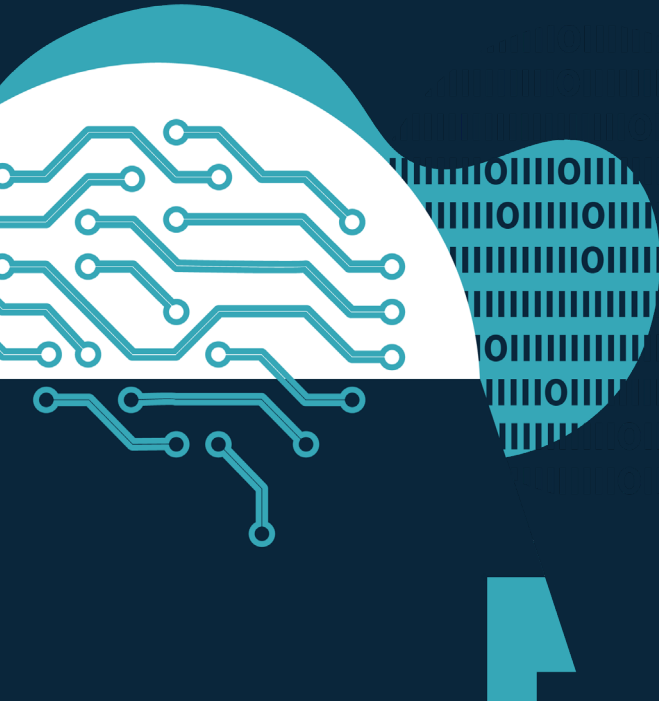
**TIME FOR AI**  
MARKETING AND CONSUMER  
TRENDS IN 2023



# TIME FOR AI

MARKETING AND CONSUMER  
TRENDS IN 2023

January 2023



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## INTRODUCTION

What are the marketing and consumer trends that will shape 2023? This paper examines two different perspectives: The exogenous perspective that focuses on the changes in consumer habits, while the endogenous perspective covers the technological evolution of the tools and workflow of Chief Marketing Officers. However, aside from being either exogenous or endogenous factors, all of these factors shared technological influences, with Artificial Intelligence in particular, as their driving force.

In times of increased uncertainty and unfavorable macroeconomic prospects, companies tend to decrease their investments in marketing and communication (despite data showing there is a greater probability of success - in terms of growth - when companies keep betting on the market). Similarly, we are witnessing a surge in the use of artificial intelligence, with the emergence of generative models and, most notably, ChatGPT, which

has become the fastest growing technology to reach 1 million users in 5 days, surpassing the 2.5 months it took Instagram to reach this milestone. For this reason, we believe that in this context, it is particularly important to analyze how the crossovers between the exponential development of these technologies and their popularization together with the tensions between consumers and brands determine where to focus our attention in order to continue adding value, both for companies and consumers.

On one hand, these trends represent technological innovations, and they measure and analyze data with topics like generative AI, CX orchestration (zero party data, customization, and the implementation of Journeys), attribution models, and data analysis at every stage of the strategy. On the other hand, there are trends closely linked to changes in consumer habits, such as expense management and use of monetized content. At the same time, we wanted to explore buzzwords like the metaverse, super apps, behavioral economics and decentralized commerce, to

understand where we stand today and the impact they may have on our businesses, our clients and our everyday work.

We started with 23 trends, which were then picked by a multidisciplinary team of 10 senior experts from LLYC's Consumer Engagement and Deep Digital Business areas that selected the top 10 most relevant trends according to these 4 criteria. This included: the impact on the business, its impact on the CMO's role, how different it is, as well as its novelty as a trend.

## METHODOLOGY

As a first step, we used our Trendspotting methodology to identify 23 macro trends that were considered to be the major trends of 2023, according to various sources.

Then, we selected 10 trends with the highest ratings based on the three criteria - the impact, novelty and differentiation of each trend - according to 10 multidisciplinary experts from LLYC.

Lastly, we wanted to highlight the importance of developing more people-centered strategies, by using tools and techniques designed to capture and analyze data and obtain better insights. Therefore, we tried to identify which of the 10 selected trends are causing the greatest activation (volume of searches) by brands and people. .

This helped identify the trends that had achieved significant mass relevance over a given period of time.

- **Trend growth rate- How fast are the trends growing?**

We sought to identify whether these trends had a strong momentum in their acceleration or growth dynamics.

To do this, we identified the growth level and analyzed the type of curve (exponential, linear, logarithmic) of each trend.

- **Degree of trend differentiation - Can these trends generate a sustainable competitive advantage?**

In addition, we calculated the degree of differentiation for each trend to be able to establish its ability to generate a sustainable competitive advantage. .

We also complemented the search with ChatGPT, using the following approaches:

- Using a scale of 1 to 10 (1 representing the lowest rate and 10 indicating the highest rate of adoption) in order to evaluate the adoption of these trends among the 1,000

leading companies in the world (including the sources used for the analysis).

- Which of the previous trends have the most differentiating impact? In other words, which of these trends have the capacity to generate a sustainable competitive advantage over other companies? Rating them on a scale of 1 to 100.

It is worth noting that ChatGPT<sup>1</sup> itself cautions us about how this rating reflects their own interpretation, which may be subjective and varies from person to person.

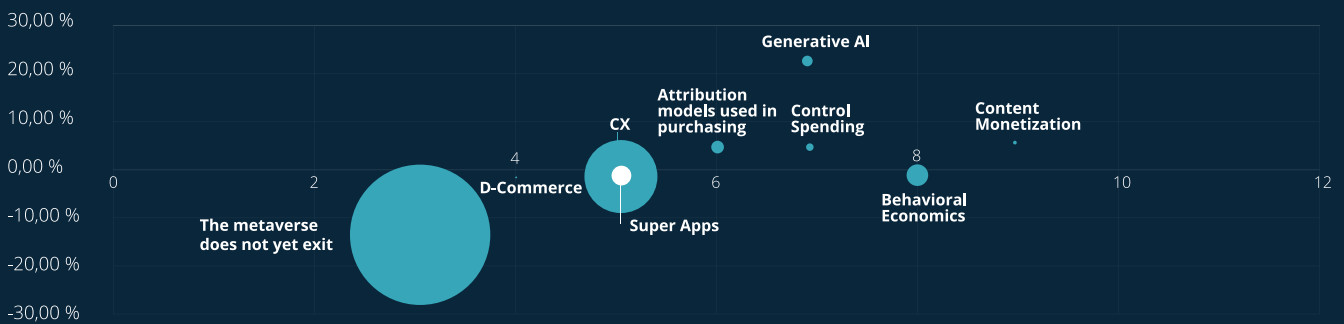
<sup>1</sup> Searches made between January 1, 2022 and December 29, 2022. Sources: Googletrends, ChatGPT

# LLYC TREND SPOTTING INDEX:

## PRIORITY OF TRENDS, BASED ON THEIR VOLUME, ACCELERATION AND DEGREE OF DIFFERENTIATION

The LLYC Trendspotting Index assisted in organizing 10 trends that we believe will be the most relevant throughout 2023 and that each present a significant opportunity for brands to develop a point of uniqueness and differentiation with their consumers. This index combines the following parameters in a single KPI: volume, acceleration and differentiation.

**Chart 1. Acceleration and differentiation of 10 macro trends**



**TREND 1. THE REVOLUTION OF CONTENT: GENERATIVE AI**

**LLYC TREND SPOTTING INDEX: 73%**

Acceleration: 22,9%  
Differentiation: 70%  
Volume (searches): 11 points

**TREND 2. BEHAVIORAL ECONOMICS. INTENTION VS BEHAVIOR?**

**LLYC TREND SPOTTING INDEX: 70%**

Acceleration: -0,4%  
Differentiation: 80%  
Volume (searches): 27 points

**TREND 3. THE FIGHT FOR CONTENT MONETIZATION**

**LLYC TREND SPOTTING INDEX: 70%**

Acceleration: 6,6%  
Differentiation: 90%  
Volume (searches): 4 points

**TREND 4. DOES EVERY PENNY COUNT? ATTRIBUTION MODELS USED IN PURCHASING DECISIONS**

**LLYC TREND SPOTTING INDEX: 67%**

Acceleration: 4,3%  
Differentiation: 60%  
Volume (searches): 4 points

**TREND 5. CX FROM ZERO PARTY DATA TO PERSONALIZATION**

**LLYC TREND SPOTTING INDEX: 60%**

Acceleration: -0,6%  
Differentiation: 50%  
Volume (searches): 304 points

**TREND 6. HIGH PRICES, LOW EXPENSES**

**LLYC TREND SPOTTING INDEX: 60%**

Acceleration: 4,1%  
Differentiation: 70%  
Volume (searches): 9 points

**TREND 7. GOODBYE BIG DATA, HELLO HUGE DATA**

**LLYC TREND SPOTTING INDEX: 55%**

Acceleration: 1,1%  
Differentiation: 90%  
Volume (searches): 2 points

**TREND 8. SUPER APPS, SUPER EXPECTATIONS**

**LLYC TREND SPOTTING INDEX: 50%**

Acceleration: -1,3%  
Differentiation: 50%  
Volume (searches): 25 points

**TREND 9. THE METAVERSE DOES NOT YET EXIT**

**LLYC TREND SPOTTING INDEX: 47%**

Acceleration: -12,5%  
Differentiation: 30%  
Volume (searches): 866 points

**TREND 10. D-COMMERCE. DECENTRALIZED, DIRECT AND DEMOCRATIC**

**LLYC TREND SPOTTING INDEX: 23%**

Acceleration: -1,5%  
Differentiation: 40%  
Volume (searches): 0 points

# THE REVOLUTION OF CONTENT: GENERATIVE AI

In 1950, Alan Turing, mathematician and forerunner of modern computers, asked himself the following question: "Can machines think?". This issue has been at the center of the Artificial Intelligence discussion for many years.

The current discussion centers on scientists who support "the science of AI," which aims to develop an artificial intelligence that can virtually comprehend and reason at levels comparable to those of humans. **(Artificial General Intelligence - AGI)**; versus scientists in favor of "AI technology," the so-called "Industrial AI," which is **generating more expectation and has a greater sex-appeal because it focuses on the practical applications of these technologies with short and medium-term results.**

Consequently, Industrial AI has altered the technology landscape during the past year, nearly

on a weekly basis. Such is the degree of disruption that we are now familiar with terms such as **Dall-E (v2), Stable diffusion 2.0 or Midjourney**, which all create images, or ChatGPT, the most powerful chatbot created ever. **All of them are tools that use AI to generate content.**

According to **Gartner** by 2025, **generative AI will constitute 10% of all data produced globally. These tools are in the early stages of development, but they will have the potential to revolutionize the way content is created and distributed.**

How? By **creating original text, images, voice or music with AI and using a simple text description** (prompt),

which will generate new content based on deep learning, and which will use common linguistic algorithms and processing techniques to create coherent content with millions of preset automated learning data and parameters.

As a result, we will be able to produce visuals, music, voice or original texts, in a certain tone and style, from stories to entertainment. Having a blank page won't stop us from drafting scripts, reports or presentations thanks to this. Translating them into multiple languages and subtitling them. Creating personalized ads and multiplying them to perform A/B tests. Generating human-like conversations. Or creating **generative design** to develop prototypes and products that

increase our competitiveness in the market.

With the help of generative AI, **companies and professionals can quickly and credibly automate tasks and kick off creative processes to produce novel advancements and content that is tailored to their brands. All of this will be accomplished with significant time and financial savings.**

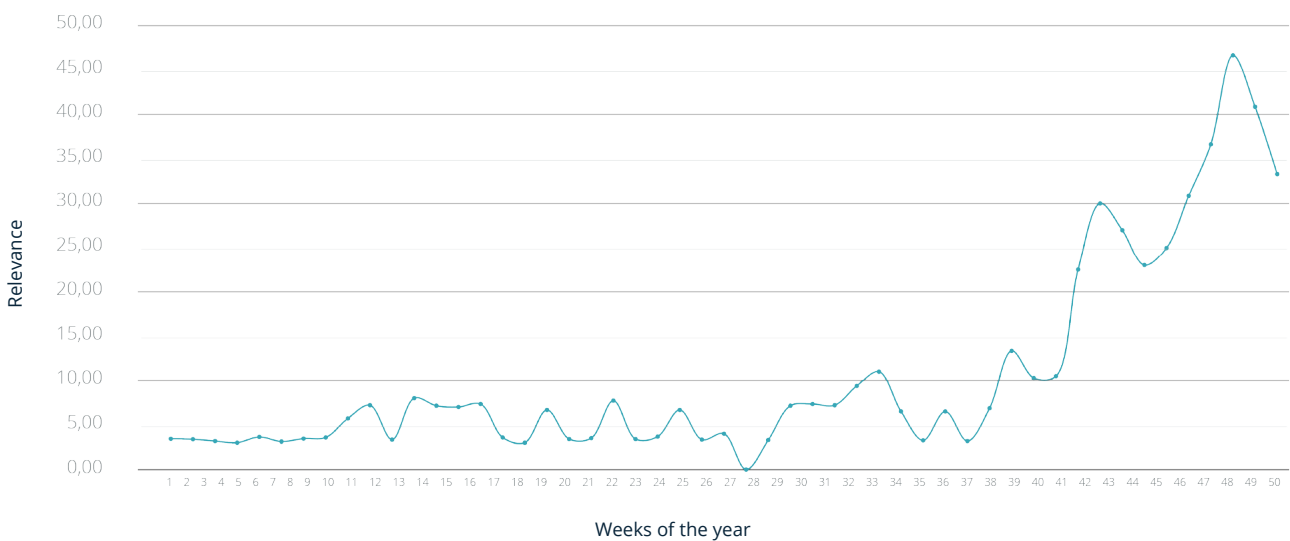
**By combining Generative AI, it will be easier to go from product to service directly, achieving a multiplier effect.** Linking ChatGPT with a chatbot will allow us to automate commercial tasks, such as the processing of customer service responses, with a deeper and more natural level of learning. The interaction capacities and

question-answer conversation model will make it difficult for a user to tell whether they're having a conversation with a human or a machine.

As of right now ChatGPT is not tied to the Internet, its search engines or voice assistants (such as Alexa, Siri, etc.) However, **Microsoft** plans to partner with the chatbot and revolutionize its own search engine, Bing, in March to compete with Google. Moreover, **Sundar Pichai**, CEO of Google sees ChatGPT as a "code red" for its query business, which might have to be reinvented or replaced.

**Including ChatGPT's services in web browsers will surely change users' habits with regard to how they consume information on the Internet and perform**

**Chart 2. Generative AI**



**content queries, product/ service reviews, and/or search engine positioning task.** This will no doubt affect the online advertising world, which has heavily relied on search engine's manipulation of the algorithm, particularly within Google and Meta.

Consequently, **the marketing world will have to adapt by having more players and finding ways to take advantage of them.**

Editing tools, such as Adobe Photoshop and Wordpress, are starting to feature artificial image and text technologies, such as Midjourney using GPT-3. Image banks, such as Gettyimages or Shutterstock, are now offering generative art (with some limitations, due to the copyright debate) as new features, products or services.

**Therefore, brand content is and will become increasingly democratic and decentralized.** Generative AI grants autonomy to the consumer to generate unique and individual content (UGC - User-Generated Content) that can be tokenized (through NFT and blockchain), and be even marketed to generate revenues. **In this regard, users will become content owners.**

The result of the aforementioned will mean **new business models, ways of communicating and interacting for users,**

**the creation of modern communities, joint development and contribution formats for consumers.**

**There are limitations, however.** Some technologies are trained with limited knowledge datasets (ChatGPT incorporates data up to 2021)so some of **its responses may be inaccurate, inconsistent and even robotic** We run the **risk of consuming fake content or feeding new generations with misinformation** if the systems are trained with information that is not up-to-date.

Like HAL 9000 in 2001 Space Odyssey, AI has a dangerous side if given excessive power. We will need **hybrid systems with a human side overseeing to make AI systems more robust. Instead of replacing us, AI complements us and gives us a generative capacity that invites us to innovate, test and learn.** Try it for yourself!

- LLYC Trend Spotting Index: **73%**
- Acceleration: **22,9%**
- Differentiation: **70%**
- Volume (searches): **11 points**



**“We will need hybrid systems with a human side overseeing to make AI systems more robust”**



## **BEHAVIORAL ECONOMICS. INTENTION VS BEHAVIOR?**

**CAN WE UNDERSTAND AND EXPLAIN PEOPLE'S DECISION-MAKING PROCESSES: CUSTOMERS, CONSUMERS, USERS, CITIZENS, EMPLOYEES, SUPPLIERS, SHAREHOLDERS...?**

The art of trying to understand and explain how the brain works during decision-making processes can be traced a long way back. From Plato and Descartes' defense of human "rationality", to Aristotle and Spinoza's more integrated vision, the desire to understand people continues to be one of our biggest challenges. As stated by J. A. Marina: "**the human brain is a huge continent and it has the greatest complexity in the universe**".



Let me simplify the human brain's evolution before I can build the thesis on how it works. First up is the **reptilian** complex, which is responsible for the most basic survival functions, next is the **limbic or emotional** complex (mammalian) and finally, we have **the human or rational brain**. Like any other organism, the brain is programmed to optimize energy consumption. In any decision-making process, the fast brain (system 1) activates faster than the slow one (the rational one), as Kahneman (Nobel Economics 2002) defends in "Thinking fast and slow".

In **Kahneman and Tversky's prospect theory**, the theory of economic rationality is challenged. They argue that **in uncertain environments, humans take shortcuts (heuristics) to respond quickly. These cognitive shortcuts sometimes lead us to make decisions based on biases, which defy rationality.**

**SO, HOW DOES THIS AFFECT CONSUMERS?**

The belief that customers and companies maximize profits under any circumstance is not quite accurate since the time horizon and frame distort our decisions. **"Without emotion, there is no memory and memory drives action"**, stated Antonio Damásio. The obsession to create memorable (positive) experiences to be remembered ("to remember" in Latin "recordari", re (again) and cordis (heart) - going through the heart again) is the key to being chosen among the unlimited range of products and services from several brands that want to be differentiated.

**WHY SHOULD THE CMO BE INTERESTED IN THIS?**

Using this exploration method improves the effectiveness of commercial activities and helps us understand the decisions people make every day. Why do we pay for the gym every year and never go? Why we prefer not to lose than to win?. **We are irrational, but predictably irrational, as Dan Ariely explains.** Understanding and employing these patterns is essential to reduce the gap between **intention and behavior.**

**Obtaining deep insights from customers** and understanding what they say, do, think, and feel requires a method. Whether it's psychometric, neurometric, or biometric measurements, with different degrees of development and effectiveness **we can make the most of our discoveries. This is how we understand the main journeys (experiences) of a customer's life cycle** and are able to improve relationships and design products and services based on real needs. **A good diagnosis with excellent execution is what makes the difference.**

Companies that use these practices in a structured way achieve higher conversions in the sales funnel, higher efficiency levels, higher campaign redemptions, improve customer loyalty rates, and lower shopping cart abandonment rates. Creating specialized areas can be **implemented ethically and effectively across the value chain, leading to improved business results and more impactful institutional campaigns.**

**“Creating memorable (positive) experiences to be remembered is the key to being chosen among the unlimited range of products and services from several brands that want to be differentiated”**

**HOW DOES THIS IMPACT BUSINESSES?**

Nobel Prize winner **Richard Thaler and Cass Sunstein** introduced **“the nudge”** and the concept of libertarian paternalism to, as a way to promote the behaviors that the leaders consider to be "good for the citizen." This concept can also be applied in various business areas, such as **pricing strategies, how options are presented, online shopping experience design, communication, and managing employee motivation and incentives.**

How should prices be presented and established? How many options should be presented? How should selling points be designed? How should the

onboarding process be designed to maximize conversion? How should companies communicate with customers? What is the minimum amount after which no shipping costs are charged? How should the omnichannel experience be designed to reduce friction? How should social norms be used? These are some of the many questions that **can be optimized through nudging to improve sales.**

Some of the most popular examples of this are: the Barnum effect, when Coca-Cola or Nutella customize the bottles or jars with names; the Inertia effect, when opt-out is necessary in default options(widely used in subscription-based businesses) ; the magical effect of "free stuff", also known as loss aversion;entry

product prices on Amazon;the Anchor effect on Starbucks to differentiate yourself from your competitors;or the "fly" in Amsterdam's urinals, to reduce cleaning costs by more than 50%.

**Corporate marketing strategies use them, politicians promote them.**

**When properly managed, the economic return is huge.**

However, there is a surprising imbalance between the large investments in data analytics, algorithms, and mathematical models and the focus on practical aspects of emotional management and behavioral sciences.

Life is a competitive battle.. Just like species in the wild,

companies and organizations that best adapt to their environment survive and continue to exist. Those that do not are not chosen by customers, consumers, patients, citizens, users and shareholders.Thus, **It is people who decide who survives, who leads and who disappears.**

- LLYC Trend Spotting Index: **70%**
- Aceleración: **-0,4%**
- Diferenciación: **80%**
- Volumen (búsquedas): **27 points**



**Chart 3. Behavioral economics**



## THE FIGHT FOR CONTENT MONETIZATION

In recent years, large technological platforms and content creators have formed a mutually beneficial relationship. However, the significant increase in investment in digital advertising has destabilized this partnership, making it necessary to **reevaluate the monetization and business model of social media.**

A study by **Adobe** in 2022 found that the number of people creating and sharing content on digital platforms has grown by 165 million in the past two years, reaching a total of 303 million creators. Countries such as Brazil and Spain have particularly high

numbers of content generators, with 106 million and 17 million respectively. It's worth noting that social networks are also evolving; **Insider Intelligence**, predicts that nearly 70% of internet users from Generation Z will use TikTok in 2023. This growth in creators and platforms highlights the need to re-evaluate the distribution of revenue within the **Creator Economy** as social media platforms may not necessarily be the biggest beneficiaries of this trend.

**The creator economy is defined as the economic and social infrastructure that allows the work of content generators.** It encompasses the digital and economic ecosystem in which creators produce their work, build their audience and distribute their content. This ecosystem includes digital platforms such as Facebook,

YouTube, Twitch, Instagram, TikTok, Twitter, LinkedIn, Substack, Discord and Patreon, as well as the digital tools that creators use, startups, and the broader network of individuals and businesses that support creators' efforts to **make a living** through their work.

Until now, **the primary sources of income for platforms and creators came from the advertising on the platforms, brand partnerships and sponsorships and, to a lesser extent, subscription models and direct donations from followers.** The major platforms seemed relatively content with this revenue model, but content creators felt that they were not receiving a fair share of the profits despite investing their creativity and energy to generate millions of views and visits.



**“The greatest challenge is to know how many users are willing to pay for content that they used to receive for free and to design a business model that meets the needs of all the stakeholders in the digital content ecosystem”**

**Creators are becoming increasingly interested in protecting their autonomy from technological platforms** and are aware that changes to their algorithms can negatively impact the reach and revenue generated from their content.. This is why more and more creators are choosing direct subscription models, bypassing middlemen. Platforms such as WhatsApp, **Telegram** and increasingly **Discord** are being used as direct distribution channels for "premium" content that they monetize through other platforms like Patreon or Ko-fi. However, **these platforms are also aware that they do not have the same reach** as the big platforms.

Sometimes platforms are unsure of their business model, as we have seen recently with the commotion caused by Elon Musk after the acquisition of Twitter and

the reinstatement of the social network's business model, which veers towards a subscription model, far from the cost-free scheme to which most users are accustomed.

Others, like **Meta**, Youtube, **Twitch** or **TikTok** are trying to find new formulas for creators to monetize their content with direct payments, subscriptions, premium content, micro-patronage formulas, or the remuneration of the platforms with exclusivity contracts for the streamers with the most followers.

There are already **4.7 billion active users on social media across the world** i.e., 59% of the world's population, so the volume of the market is immense. **The greatest challenge is to know how many of them are willing to pay for content that they used to receive for free** and to design a business model that meets the

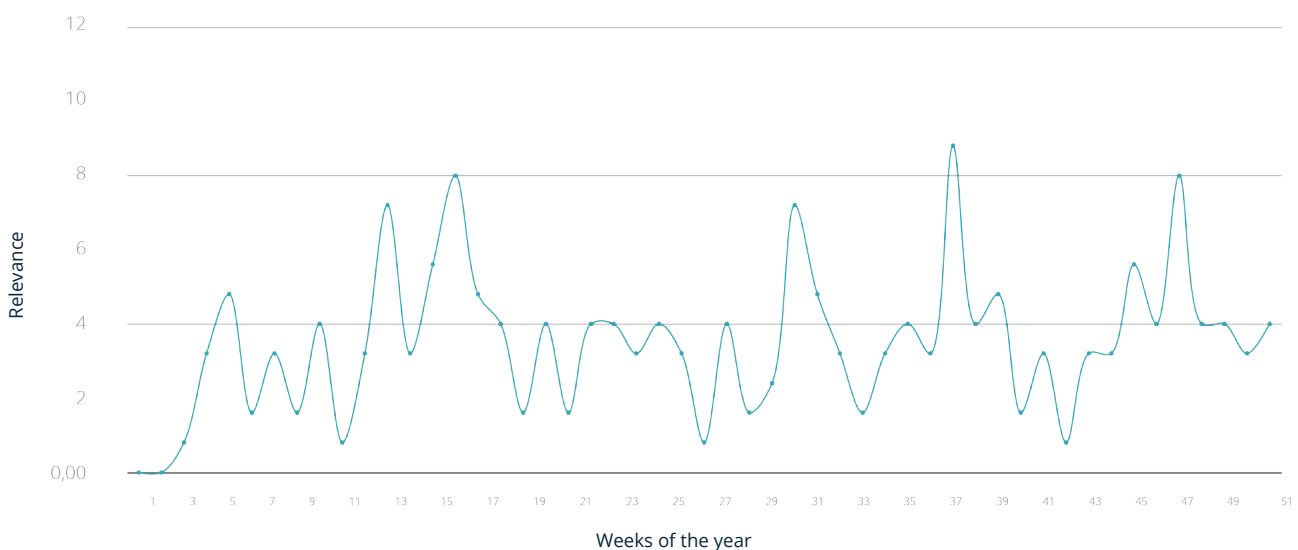
needs of all the stakeholders in the digital content ecosystem.

Content creators and platforms need each other for this model to be sustainable and bring value to media consumers and to the brands that invest in this fragile ecosystem, which has not yet established its balance.

- LLYC Trend Spotting Index: **70%**
- Acceleration: **6,6%**
- Differentiation: **90%**
- Volume (searches): **4 points**



**Chart 4. Content Monetization**



## **DOES EVERY PENNY COUNT? ATTRIBUTION MODELS USED IN PURCHASING DECISIONS**

Talking about trends means thinking about the present (and future) rather than the past, but we must never forget that marketing is a discipline that has been practiced since the 19th century, when humanity began to develop economically and companies began to invent and discover ways to sell their products.

As early as 1874, John Wanamaker, Chairman of a North-American company, published the first copyrighted advertisement and was beginning to wonder if his investment in advertising would have the effect he was looking for. **John left us the following**

**quote, which is still very significant in the world of marketing: "half the money I spend on advertising is wasted; the trouble is, I don't know which half," John posed a challenge that, today, 150 years later, is still unresolved.**



And this is because, at present, most companies are still unable to determine the extent to which marketing influences consumers' purchasing decisions. Many focus on tracking their campaign interactions, on metrics, rather than gaining a deep understanding of which levers have a real impact on their customers' decision-making processes.

**According to a recent estudy conducted by LLYC and the ROI Marketing Institute, 70% of companies in Latin America and 50% in Spain and Portugal do not use attribution models to monitor their marketing and communication campaigns.** And needless to say, the lack of robust attribution models in companies makes it impossible to define which factors have a real impact on purchasing decisions.

However, what are we trying to address when we talk about

"attribution models"? What are the most common models used? How are they chosen?

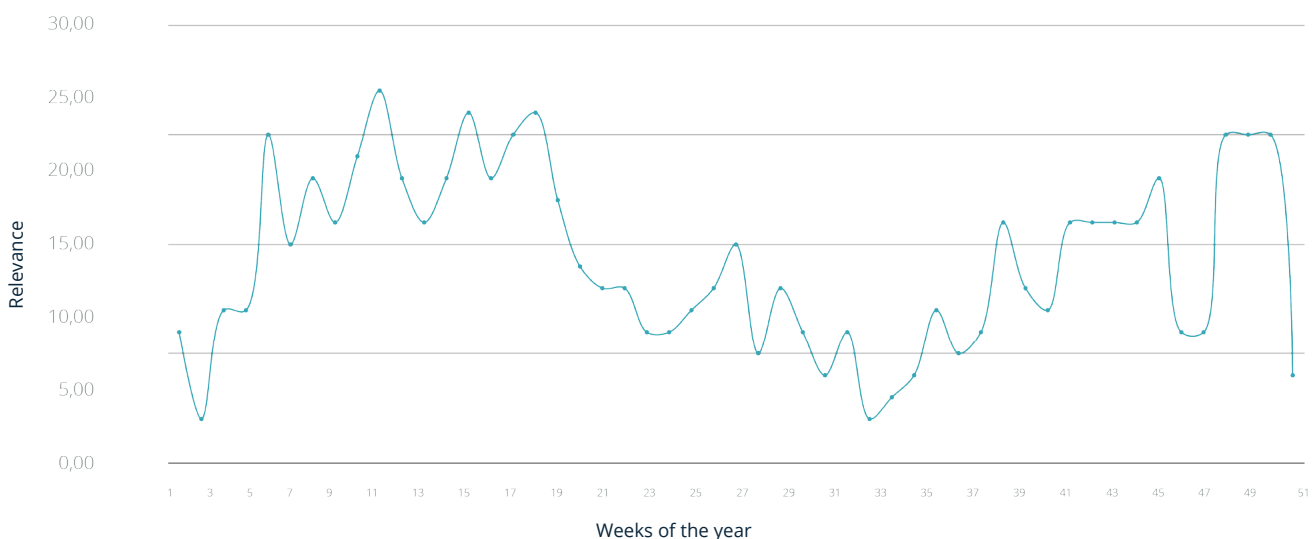
Attribution models are created to give value to the different factors that have an impact on purchasing decisions, such as price, reputation, recommendation, proximity, availability of the product or service, brand recognition, presence in digital media, etc.

To achieve this, it is necessary to investigate and find out the percentage of influence of each factor on the purchase decision. Once the factors and their respective percentages of influence have been defined, it is necessary to identify a second factor: the number of purchases influenced by each factor. Traceability through technology is key, because it not only makes processes more efficient, but also makes them more robust due to the greater capacity to

gather, analyze and manage data in a hyper-segmented way at a massive level. **This second process of factor isolation, also known as a "contribution model," refers to the definition of the contribution of communication and marketing initiatives to business results.** It is the link between the usual performance indicators of audience, conversion and impact volume, and their effect on the bottom line.

First interaction, last click, last indirect click, linear attribution, time reduction, position, time deterioration, etc. are the different attribution models used in recent years in the marketing world that can help us answer, through tools such as Google Analytics, which of the marketing channels used for the execution of campaigns has worked best to attract that traffic. **However, these models are not yet able to respond to the need to**

**Chart 5. Attribution Model**



measure the real economic return of each interaction or factor in the purchase decision.

The most advanced models are based on the interactions between the different channels and devices and, above all, on customization and data (other key trends of this report). These are based on **mathematical algorithms that separately analyze each business and existing customer data to determine which channels had the greatest impact.** In this way, it studies the complete journey and what matters most to us: the final conversion.

**However, the most important thing when choosing the right attribution models for each campaign or business is knowledge.** Knowing the different customer touch points (online and offline), the synergy between all channels, the different devices used, being clear about the campaign objective, and knowing the buyer persona. **To master all this information (without being redundant), data and AI are the key.**

**“At present, most companies are still unable to determine the extent to which marketing influences consumers' purchasing decisions”**

- LLYC Trend Spotting Index: **67%**
- Acceleration: **4,3%**
- Differentiation: **60%**
- Volume (searches): **4 points**





## CX FROM ZERO PARTY DATA TO PERSONALIZATION

Brands are starting to understand the value of customer experience (CX) to building long-lasting, meaningful relationships. In fact, according to data from the latest Qualtrics Global Consumer Trends Study, **CX will continue to be the number one priority for businesses in 2023.**

Last year was another disruptive one for CX. Emerging trends included new, more immersive experiences, hyper-personalization, and, most recently, the open AI tool ChatGPT.

**“Customer experience has become the next battleground for companies seeking a competitive edge”.**

This year, companies will face major challenges, changes, and uncertainty from fluctuating economic conditions, unprecedented technological advances, and increased customer

expectations, making customer experience management and listening more important than ever.

**Brands will have to deal with more connected, digital, informed, and demanding consumers, so companies must know where and how to focus their efforts.**

**If CX is key, customizing it is the most powerful tool for improving it.** Companies must treat each customer as unique, catering to their individualized needs and interests. This helps create an emotional link between the customer and the brand, which builds long-lasting relationships - but consumer privacy demands and protection measures are increasing. So, in a world where users demand both privacy and personalization,

how can companies meet those expectations? The answer is **zero-party data.**

This type of personal data, which customers provide intentionally and voluntarily, will allow companies to offer truly significant customization features throughout the customer journey. It will not only be based on each person's browsing data, but also address their preferences and opinions.

**“Consumers are demanding more privacy, but when they feel connected to a brand, they are willing to share their data proactively.”**



05

First-party data uses technology to supply useful data based on consumer behavior and habits, while zero-party data tells us about specific preferences. **The combination of first- and zero-party data will be powerful, allowing high degrees of customization**, without compromising privacy.

**ORCHESTRATING THE CUSTOMER JOURNEY**

Assuming the essential levers to build a good customer experience are available, **designing a customer journey (CJ) based on data users provide will help us go from a “meh” experience to a “wow!” experience.**

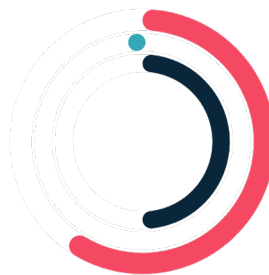
Understanding our customers and identifying the exact moments when they interact with the brand will help us anticipate their needs for our products or services, even before they are aware of them.

The reality is simple: In 2023, consumers will want their

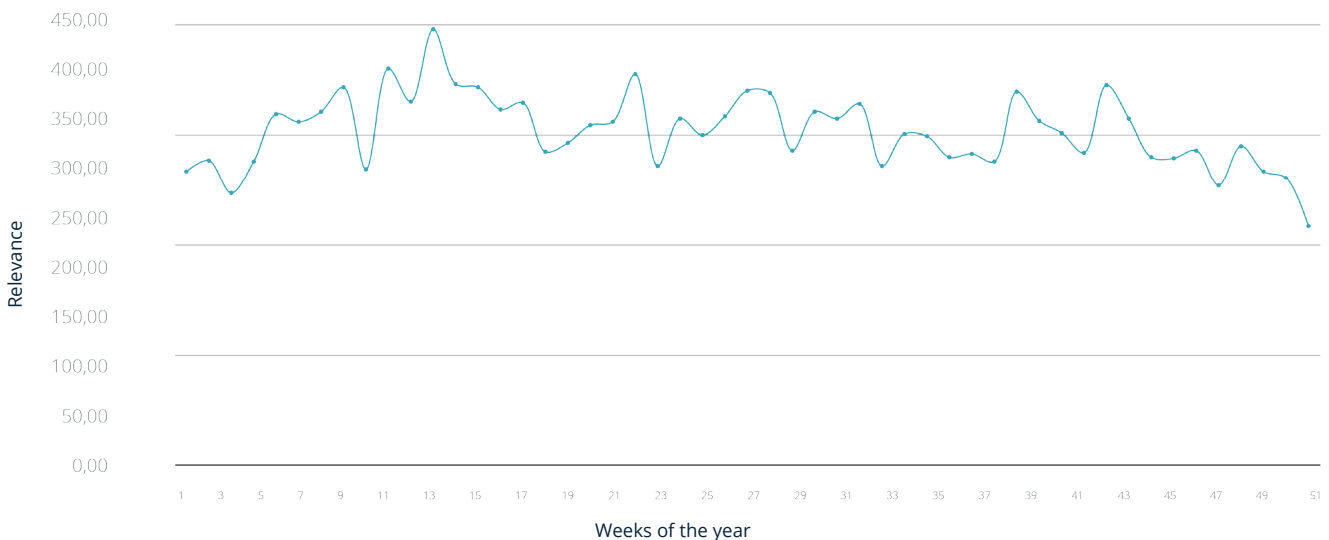
relationships and interactions with brands to be memorable and experiential, so brands that want to stay relevant must create places where they can directly interact with customers and give them those experiences. This will require them to roll out a **transformation strategy with a holistic, comprehensive solution to managing an omnichannel customer experience..**

- LLYC Trend Spotting Index: **60%**
- Acceleration: **-0,6%**
- Differentiation: **50%**
- Volume (searches): **304 points**

**“If Customer Experience (CX) is key, customizing it is the most powerful asset when it comes to improving it”**



**Chart 6. Customer Experience (CX)**



## **HIGH PRICES, LOW EXPENSES**

The 2022 predictions of a global economic slowdown appear to be coming true as 2023 begins underscoring how spending will shrink in 2023 and will create a significant challenge for different industries around the world.

According to various global experts, this year's economic dynamics may have the weakest growth rate in almost three decades, which can only be compared to the 2008 financial crisis and the effect that the pandemic had on the global economies. Developing countries will be facing a slower growth scenario in which the lack of investment and outstanding debt are beginning to weigh much more heavily on local economies..

Companies across the world are already starting to experience this. According to a **recent survey conducted by the firm OhLa**, in Latin America, which is one of the regions most affected by the economic recession and where 56% of the executives that were interviewed predicted that the economic situation in their country will worsen over the next 6 months. In Fact, managers across Colombia, Chile and Argentina have the most negative views in relation to the performance of their economies.

This effect is already impacting the budget projections and investment spending of advertisers. According to **Nielsen**, the 7% reduction in advertising market share in the U.S. during the second quarter indicates projected budget cuts for 2023, as a result of global economic dynamics.

Similarly, consumers are preparing for a significant reduction in spending. Based on our research, the percentage of acceleration of this trend is 4.1%, which is well above others, and it demonstrates the growing level of interest for individuals in the digital conversation. This is not surprising, with such a challenging inflationary environment for the end of 2022, in which the outlook for consumption dynamics is increasingly conservative, paving the way for the return of "bargain hunters," as a means to mitigate the impact in home economies.

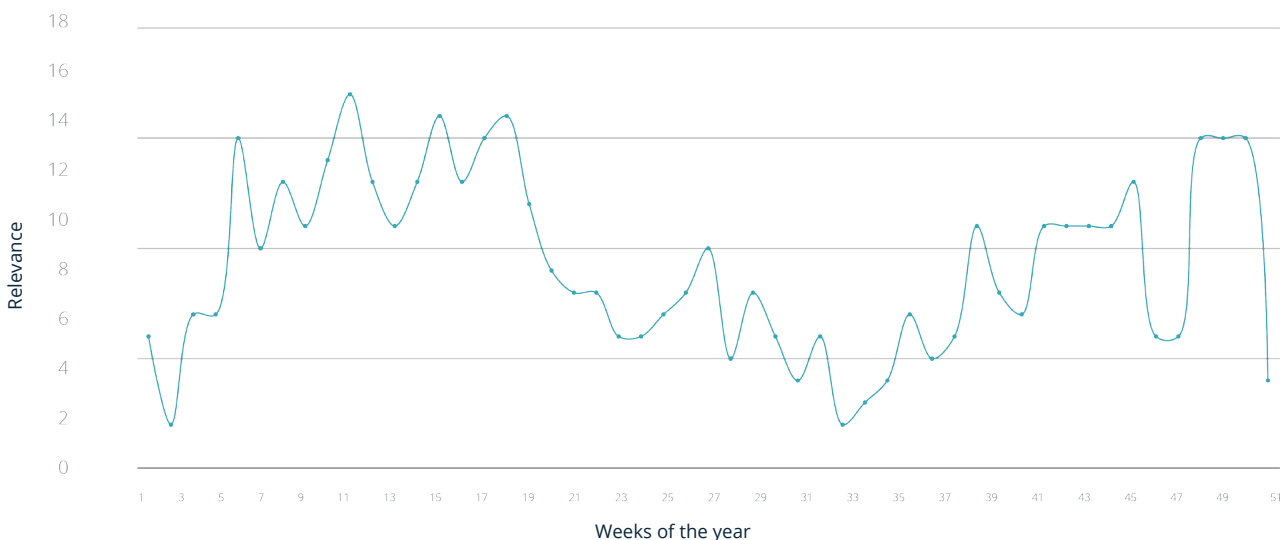
In this regard, we expect brands to focus their efforts on differentiation, both in relation to products/services and in price, with the aim of becoming more and more competitive in the face of a more cautious consumer, one who has full control over their finances.

— LLYC Trend Spotting Index: **60%**  
— Acceleration: **4,1%**  
— Differentiation: **70%**  
Volume (searches): **9 points**



**“We expect brands to focus their efforts on differentiation, both in relation to products/ services and in price, with the aim of becoming more and more competitive in the face of a more cautious consumer, one who has full control over his/her finances”**

**Chart 7. Cost Control**



## GOODBYE BIG DATA, HELLO HUGE DATA

The evolution and advances of some technologies, such as: the IoT (Internet of Things), GIS (Geographic Information Systems), 5G Internet (fifth-generation mobile networks), ERP (Enterprise Resource Planning), Apps (mobile applications), among others, have allowed us to generate and store data at any time throughout the day, from the moment we register a request, send a message, watch a video, walk, sleep, even when we breathe (depending on the devices we are using).

Thanks to this transformation, we are experiencing an exponential growth of data on a worldwide scale, managing to double the amount of information we're generating every 3 years. **By the year 2025, It is expected that we will generate 163 Zettabytes , thus shifting the era of Big Data to welcome the era of Huge Data.**

In this new era, there will be so much data available that the problem will not be how to gather

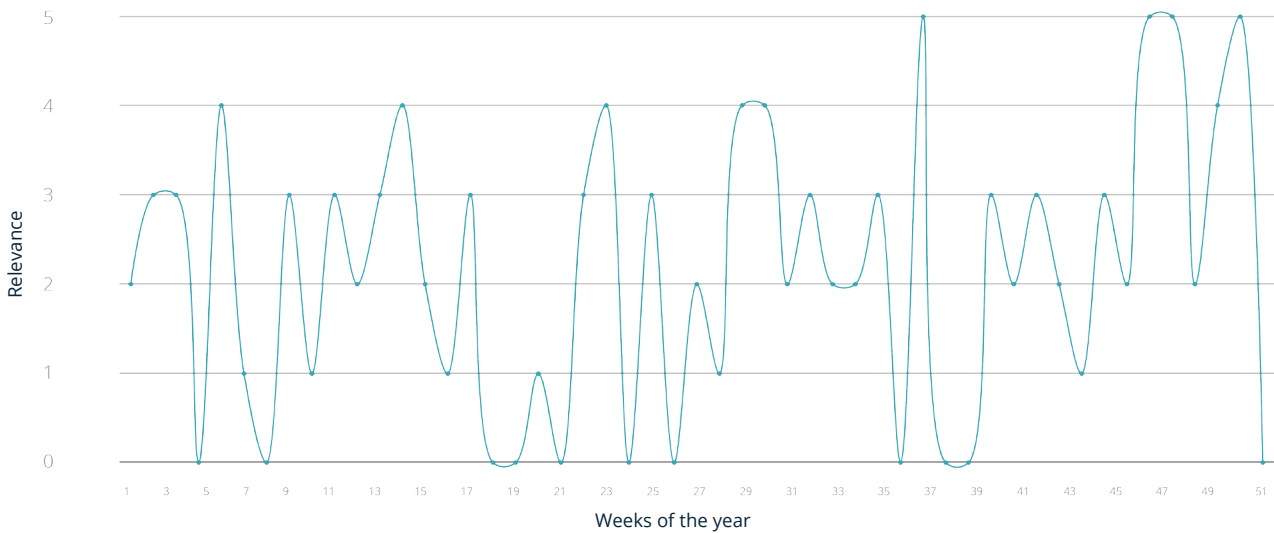
it, but how we use it to improve our products/services and experiences, while maintaining a customer-centric approach throughout the process.

This presents a great opportunity for companies, since they can use this information, both internal (generated from their own transactions) and external (available public data) to develop the best business and communication strategies from the company's different areas of interest. **Currently, only 20% of the existing information is used for decision-making processes.**

However, it is not enough to extract and analyze all of this information from different sources without a clear focal point. To solve problems and/or take advantage of opportunities, we must have a solid business strategy that seeks to solve business hypotheses, since **"data is only as good as the questions you are making"**. If we know how to ask good questions from a business point of view and with access to reliable sources of information, we will have a great competitive advantage in the sector.



**Chart 8. Huge Data**



From a CMO's point of view, **having a 360° view of the customer** allows us to create the best strategy and marketing campaign, in which we can micro-segment consumers according to their weaknesses as well as their interests and motivations, at the right time and through the right channel, to provide a better focus on the company's value proposition to organically attract new customers and retain current ones.

There are different techniques and methodologies that can be rolled out to achieve this. One of them involves consolidating internal data from our customers and external data from social media (and other sources) to have a single reading of our customers and the sector so we can formulate the best strategy: **Where to play? How to win?**

Being one step ahead is key, that is why we must take the next step and avoid being left with just a forensic analysis of what is happening (traditional analysis),

but rather search for **behavioral patterns that help us "predict" the next steps and consumer trends** through different technologies, such as Artificial Intelligence (advanced analytics).

Keep in mind that data is and will continue to be an organizations' main asset for its digital transformation, **so we must use data effectively and use it to pose the right questions.**

**“Currently, only 20% of the existing information is used for decision-making processes”**

- LLYC Trend Spotting Index: **55%**
- Acceleration: **1,1%**
- Differentiation: **90%**
- Volume (searches): **2 points**



## **SUPER APPS, SUPER EXPECTATIONS**

Elon Musk is an expert trendsetter or, rather, in giving people something to talk about. For this reason, the alarms of programmers and technology lovers around the globe were triggered when Musk stated that he wanted to turn Twitter into a "Super App." "Buying Twitter is an accelerant to creating X, the everything app," said Musk. And, without a doubt, there is a clear future and we cannot lose sight of it during 2023: Super apps are here to stay. However, should we all try to create one? What should we learn from them? How do we include them in our strategic plan? These are just a few questions we have been asking ourselves this year.

If you have certain doubts about what a super app is, this is normal. The term "Super App" is attributed to Mike Lazaridis, founder of Blackberry, who already saw super apps as a marketplace with different services in 2010, combining proprietary technology with third-party integrations, turning this platform model into the definitive solution. Meanwhile, Gastón Gil, Chief Business Developer of the development firm Acción Point, explains how "these are multipurpose mobile apps, i.e., they fulfill many purposes, and this has several advantages for users, such as reducing time to perform actions with your device, need to use fewer usernames and passwords, a single interface, and no need to download multiple apps." To sum up: A single app for everything. Something similar to a shopping mall, where you go and you can

buy everything, following the example of WeChat, which many consider is the original super app. For this reason, the founder of Blackberry identified 5 structural elements in this type of platform: They must be contextual, integrated, efficient, frictionless (usability) and applicable for daily use.

These digital products were born in Asia and in the African fintech sector, where they have been a gateway to financial inclusion, but are starting to grow now in Europe and America. For example, U.S. retailer, Walmart, is building its own version of a super app right now. But, what makes them interesting? Well, these apps allow us to accumulate a large amount of customer data and this enables brands to both anticipate their needs and better direct product proposals to them. "For example, banks can create value proposals that focus on the actual needs of people, which include different features, such as money transfers, loan granting, financial advice, payment of public services and other obligations, among others," stated Gil. And we think he is right.

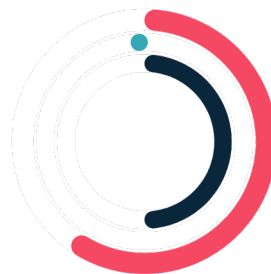
Therefore, should every marketing strategist or leader aim to create one? Not necessarily, but all subject matter specialists can learn about how super apps are disrupting the status quo of

cell phones and mobile devices, **setting higher expectations for mobile apps and user experiences in general.** Finally, this is proof that people are looking for comfort. Super apps take up less storage space on devices and users don't need to switch between apps.

To this end, throughout 2023, we should analyze user experiences ensuring that apps are as user-friendly as possible, leading developers to think about and avoid creating single-purpose apps that require users to login and then log off. Instead, experts from Google and other technology players recommend building a holistic, customer-centric app that consolidates features and forces users to integrate it into their

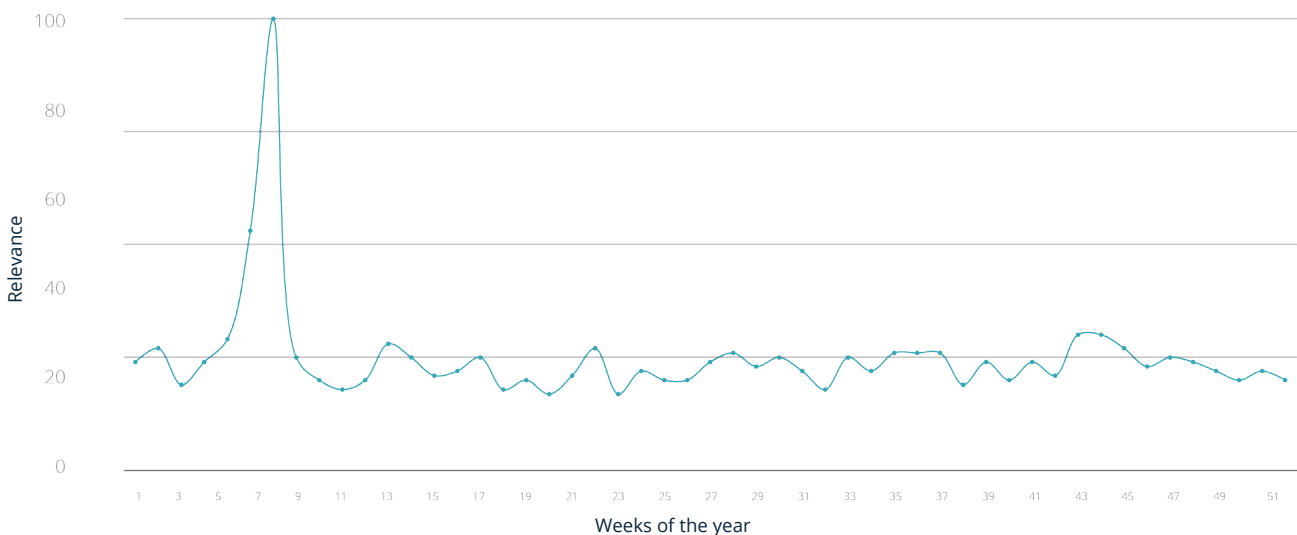
daily lives. We should focus on the customer and remember that super apps are becoming more dynamic, which will help us make our solutions much more practical and integrative. **Do we live up to those expectations, then?**

- LLYC Trend Spotting Index: **50%**
- Acceleration: **-1,3%**
- Differentiation: **50%**
- Volume (searches): **25 points**



**“Super apps allow us to accumulate a large amount of customer data and this enables brands to both anticipate their needs and better direct product proposals to them”**

**Chart 9. Super Apps**







## THE METaverse STILL DOESN'T EXIST

The term "metaverse" has become so popular over the last two years that it's not surprising it was nearly chosen "word of the year 2022" by Oxford Languages (it came second, after "goblin mode"). We mention it frequently, but it isn't as prevalent in our lives as the metaverse is because: we got fed up with the concept too soon and ran into the reality of **how complex it is to construct and how there is still a long way to go before it is fully implemented.**

Has a bubble burst? This can't be confirmed yet, since **the promise of the metaverse being the next great Internet revolution is still very much alive.** When Zuckerberg

announced his plans with META, he predicted that we would stop browsing the Internet in the future and would rather live "immersed" in it. He mentioned that this "future" would be here in the next 5-10 years.

Nowadays, the browsing process through the internet isn't in real-time. The metaverse will be, as well as being interactive, social, 3D and persistent (i.e., objects will stay in the same virtual place, which does not currently occur), and all of this will require the **development of specific technologies, such as Virtual Reality, Augmented Reality, 5G, blockchain or AI**, all of which are currently in different stages of development (for example, it is estimated that the definition of VR will not become indistinguishable from reality until the end of the decade).

### DESPITE THE FACT THAT IT IS STILL IN ITS EARLY STAGES, SHOULD CMOs BE INTERESTED IN IT?

Besides all of these challenges, big brands remain very interested in the metaverse, and this **continues to be a front-line item on the agenda for many CMOs, CIOs and CTOs**, as evidenced by a recent study conducted by **PwC** about its importance

to businesses. According to **McKinsey**, **\$120 billion were invested last year to build the pillars, connections and infrastructure of the metaverse.** In addition, it is becoming increasingly common to see how large corporations invest in management positions associated with the metaverse, such as "Chief Metaverse Officer".

While we cannot yet speak of a single metaverse, there are a number of virtual worlds where many businesses from many industries are already interacting with their customers, such as Fortnite, Decentraland, Roblox and Sandbox. It's time to experiment and find new ways to use virtual 3D environments as the entire metaverse continues to unfold over the years. It doesn't simply involve a tactical approach of a specific action that can now be carried out in a virtual world, but is associated with the lessons that this can imply for **drawing a marketing strategy that allows us to make the most out of the metaverse as soon as it reaches full capacity**".

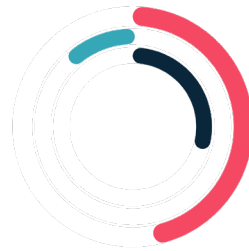
Additionally, we must keep in mind that innovation is exponential, and therefore platform changes of this size are unpredictable: brilliant technology is created that

inspires further innovation, leading to new behaviors and unlocks new use cases. We have seen this in 2022 with Artificial Intelligence and Natural Language Processing, where we have experienced advances at a speed that the greatest experts couldn't foresee, while also reaching the general public.

We must all be ready for this because the same thing could occur in the metaverse (where AI will also play an important role). If this is a place where people (consumers) will spend more time in the future, it is imperative for brands to understand how they should engage, connect

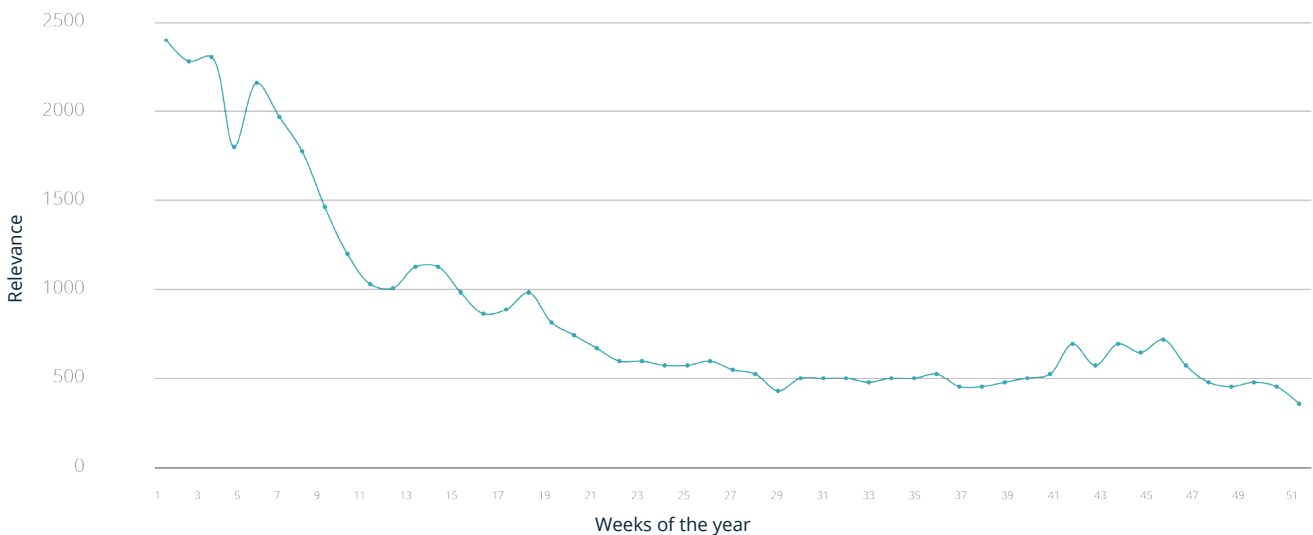
and develop their businesses.. Some people may believe that the metaverse is still unreal after the past year. But it will happen shortly!

— LLYC Trend Spotting Index: **47%**  
— Acceleration: **-12,5%**  
— Differentiation: **30%**  
Volume (searches): **866 points**



**“The promise of the metaverse to be the next great Internet revolution is still very much alive”**

**Chart 10. Metaverse**



## D-COMMERCE. DECENTRALI- ZED, DIRECT AND DEMOCRATIC

COVID-19 has significantly accelerated e-commerce, among other ways in which we have grown more swiftly. During the lockdown, millions of people throughout the world were unable to go shopping, but the Internet gave them access to non-essential items.

For this reason, in 2020, **90% of the world's population** admitted to having bought something on the Internet, i.e., purchases worth **\$4.2 million** were made during this period, a figure that increased in subsequent years due to a change in shopping habits, which will undoubtedly marks the future of e-commerce.

We can add to this context **the evolution of Web 3.0 and blockchain technology**, which is expected to create a fully decentralized network **and in which the need for middlemen for any transaction will be eliminated**, all through cryptocurrencies or NFTs.

This brings us to what appears to be the beginning of one of the biggest Internet revolutions, comparable to what happened when search engines, e-commerce, or social media first arrived. This is the ideal storm that will cause the e-commerce laws of the past to alter. Six huge companies, including Amazon, eBay, Taobao, TMall, JD.com, Pinduoduo, Rakuten, Zalando, and Shopify, currently control 60% of all worldwide e-commerce. They are the dominant players in the online sales industry.

We are about to experience the decentralization of e-commerce.



**“The evolution of Web 3.0 and blockchain technology is expected to generate a fully decentralized network in which the need for an intermediary for any transaction will be eliminated, thanks to cryptocurrencies or NFTs”**

**WHAT IS DECENTRALIZED COMMERCE?**

Decentralized e-commerce allows companies **to sell their products directly to users**. This means that it is no longer necessary for such companies to be part of a marketplace, where sellers must follow the platform's rules during their transactions.

**WHAT OPPORTUNITIES DOES IT PRESENT FOR THE BUSINESS?**

The huge advantage of decentralized e-commerce for companies will be that it will allow **direct and personalized contact** between the seller and the buyer, in addition to communication and

fluid service, something that is not possible in large marketplaces right now.

Finally, less reliance on large marketplaces, which have previously led global e-commerce.

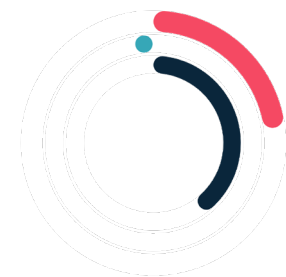
**WHAT ARE THE ADVANTAGES OF THIS FOR USERS?**

Without a doubt, in an era in which **security** is one of the greatest concerns for users, decentralized e-commerce will help create direct relationships in which the data will be owned by companies and not by large platforms that use such data for their own business purposes.

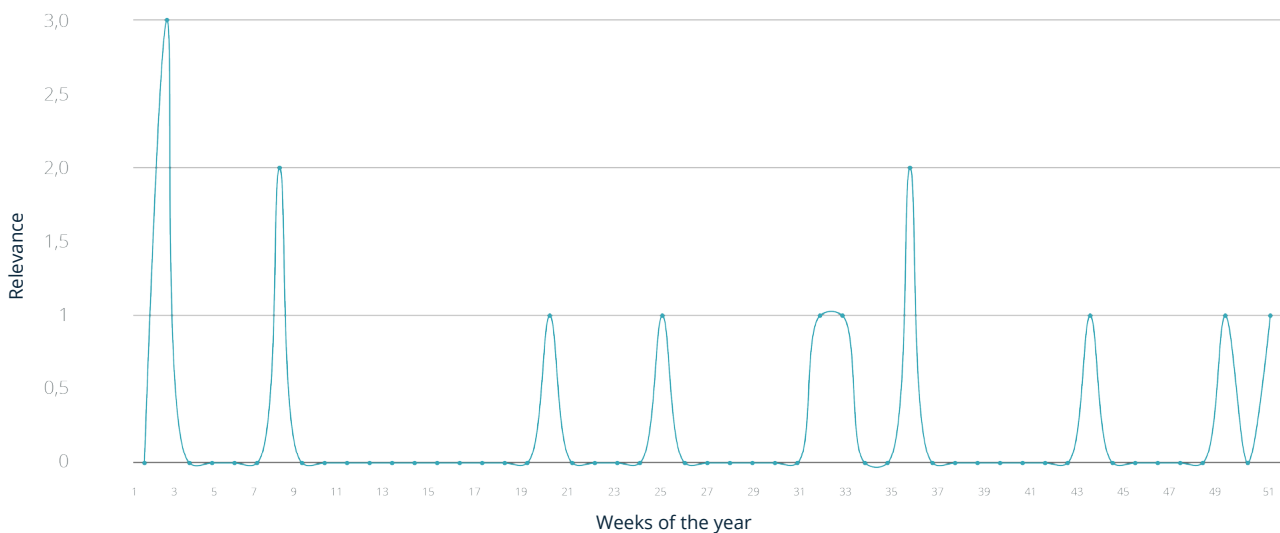
One of this year's greatest

challenges will be **access to e-commerce for any seller**, in which we will see how the main marketplaces will lose their hegemony towards a **more transparent, horizontal and democratic e-commerce environment, based on peer-to-peer relationships**.

- LLYC Trend Spotting Index: **23%**
- Acceleration: **-1,5%**
- Differentiation: **40%**
- Volume (searches): **0 points**



**Chart 11. Decentralized Commerce**



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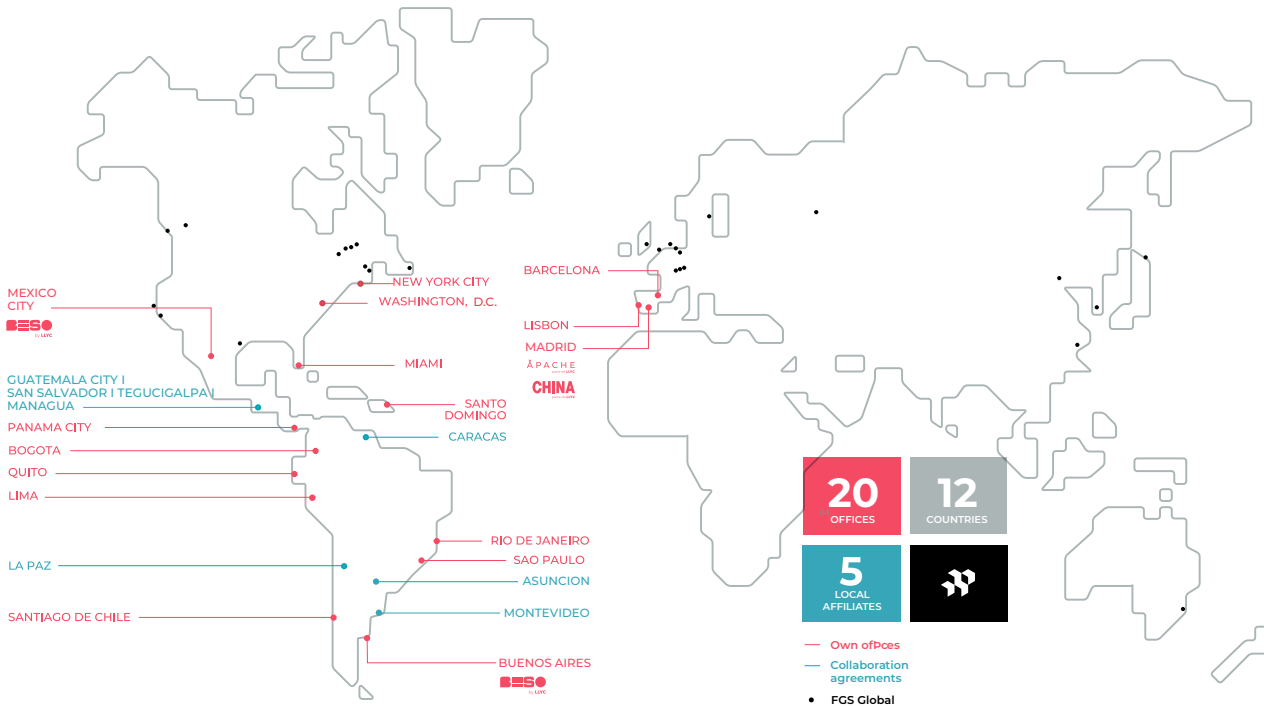
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# LLYC IDEAS

EXPLORE. INSPIRE.

IDEAS by LLYC is a hub for ideas, analysis and trends. It is a product of the changing macroeconomic and social environment we live in, in which communication keeps moving forward at a fast pace.

LLYC IDEAS is a combination of global partnerships and knowledge exchange that identifies, defines and communicates new information paradigms from an independent perspective. Developing Ideas is a constant flow of ideas, foreseeing new times for information and management.

Because reality is neither black nor white, LLYC IDEAS exists.

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