

Welcome to OMD

MEDIA LANDSCAPE 2013





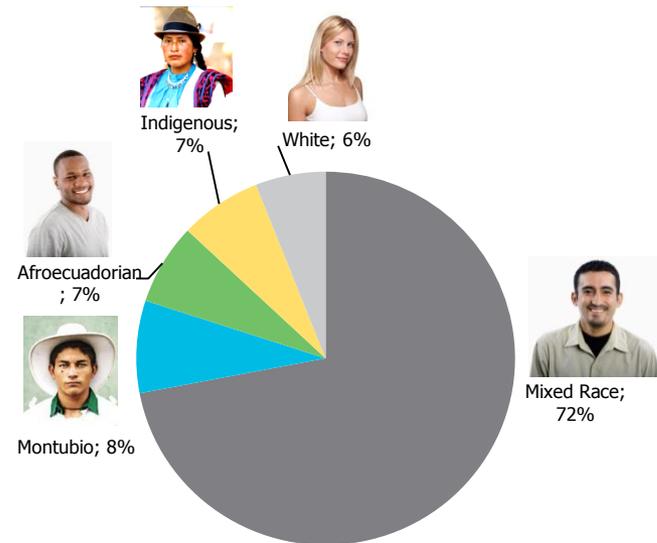
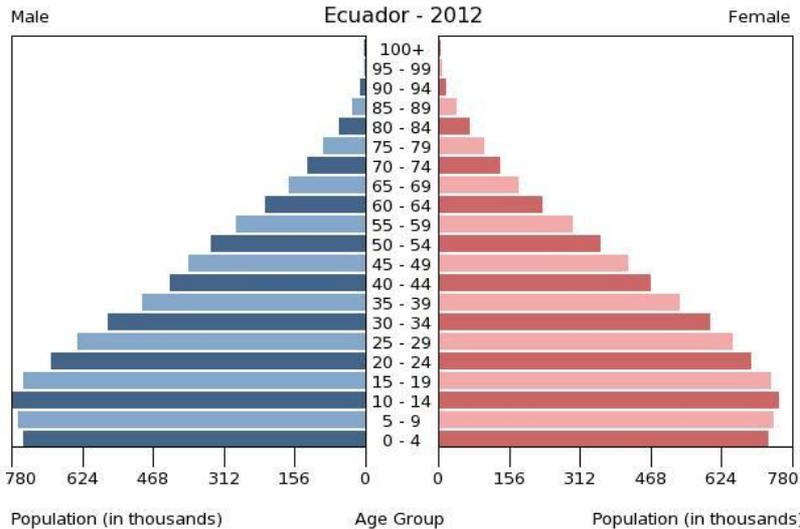
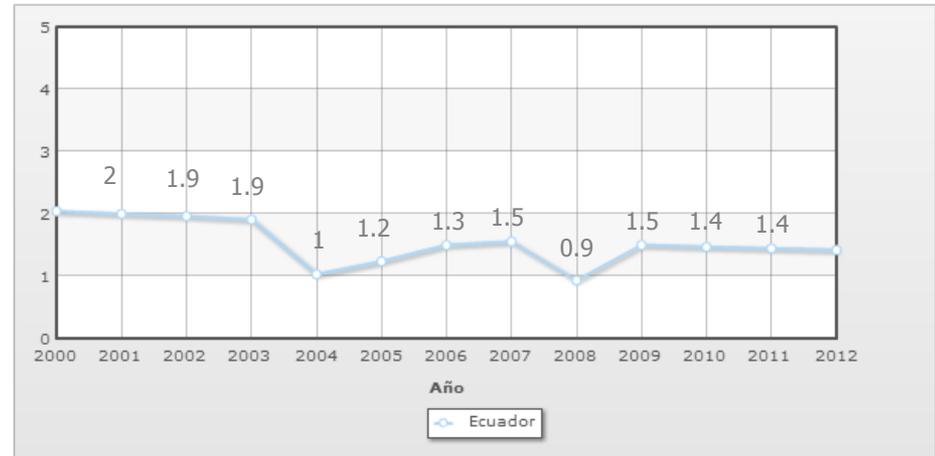
1 | Macroindicators

Demographics

15,414,599 hab. (2013)

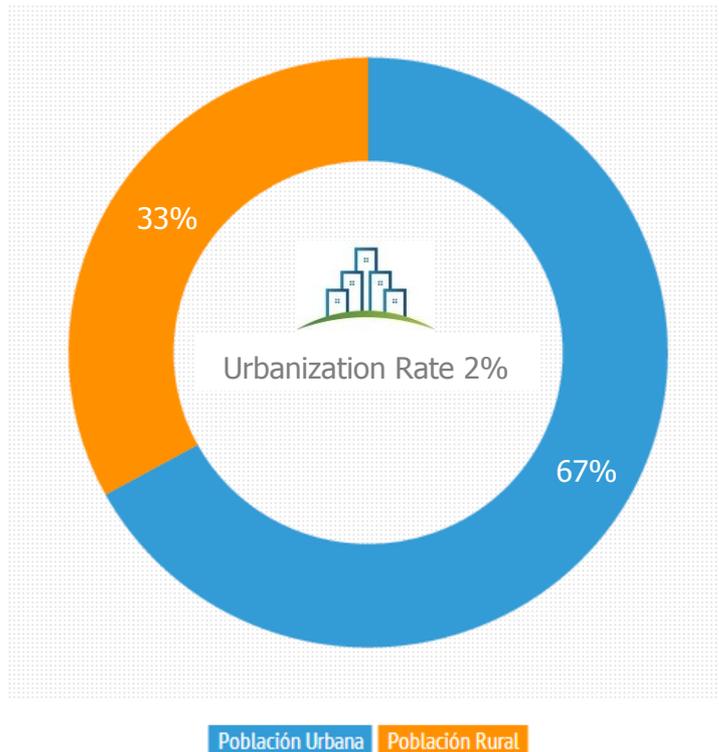


Population Growth Rate (%)



Demographics

Urbanization in Ecuador



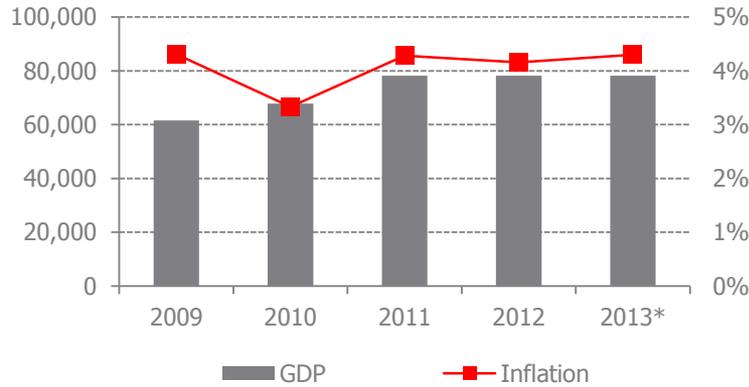
50% of Total Piopulation in Ecuador is located within the top 10 populated cities

Top 10 Populated Cities	Population according Census 2010
Guayaquil	2,978,691
Quito	2,607,704
Cuenca	529,928
Ambato	330,185
Santo Domingo	300,875
Machala	231,260
Duran	230,839
Manta	217,553
Portoviejo	206,682
Loja	170,280
TOTAL	7,803,997

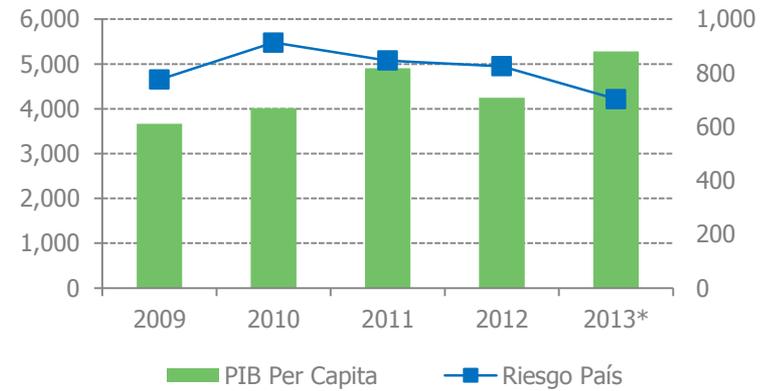
And 40% is in Top 3 cities: Guayaquil, Quito y Cuenca.

Economics

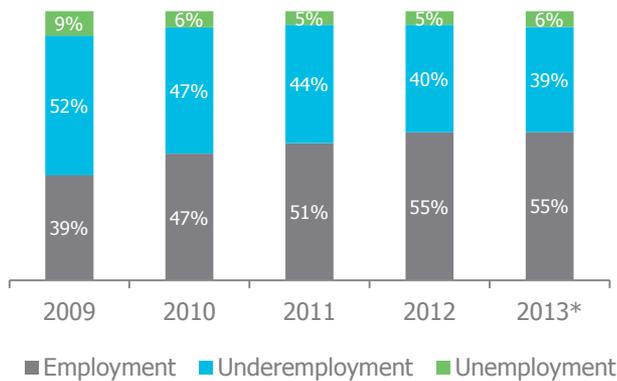
GDP (USD MM) vs. INFLATION (%)



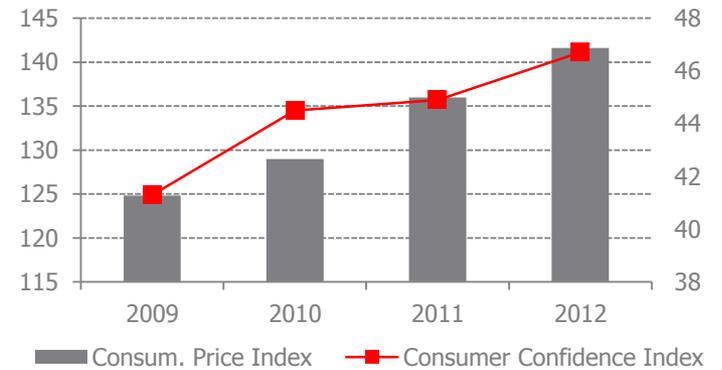
GDP PER CAPITA (USD) vs. COUNTRY RISK



LABOR MARKET INDICATORS

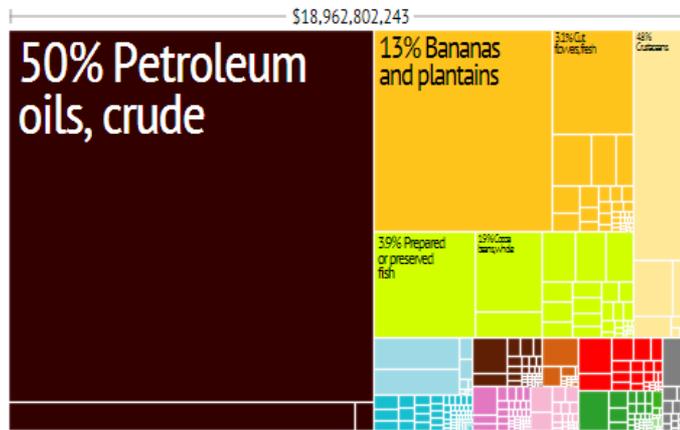


CPI vs. CCI

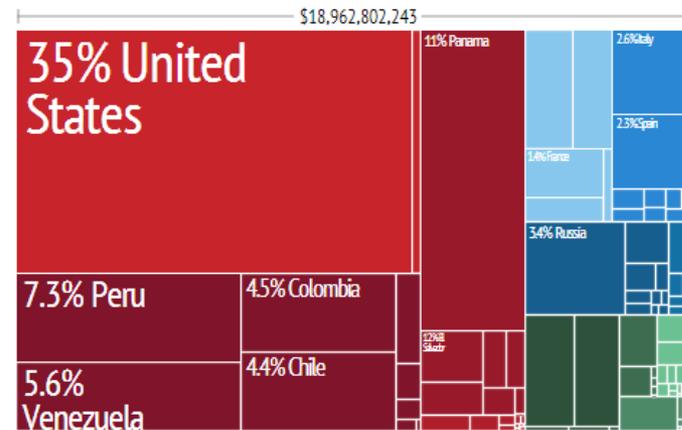


Import and Export

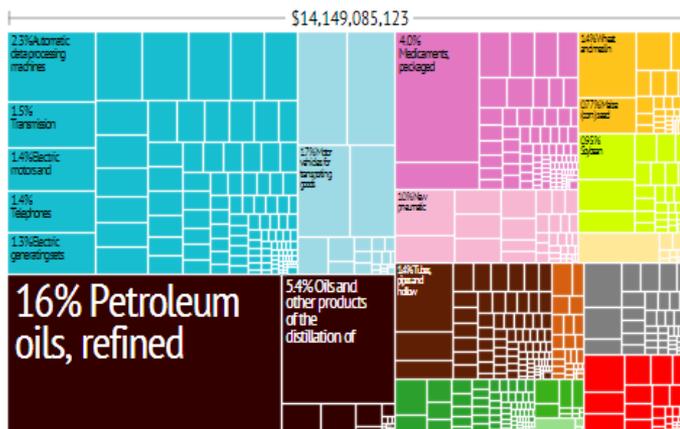
What do Ecuador exports?



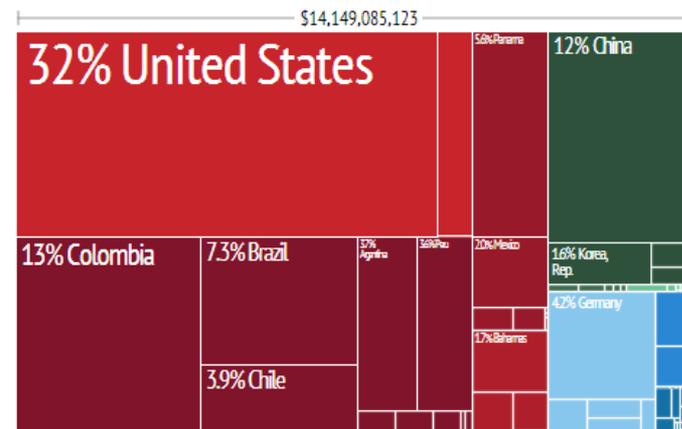
To?



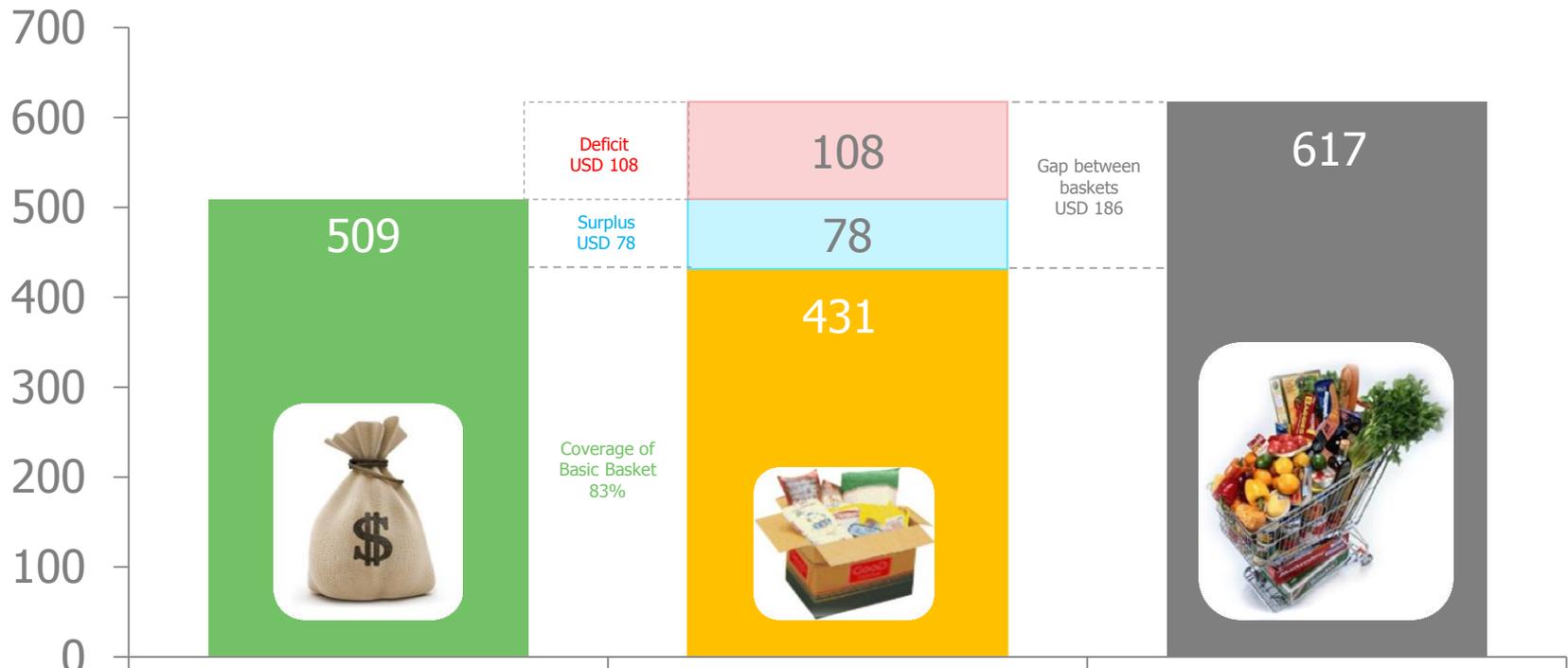
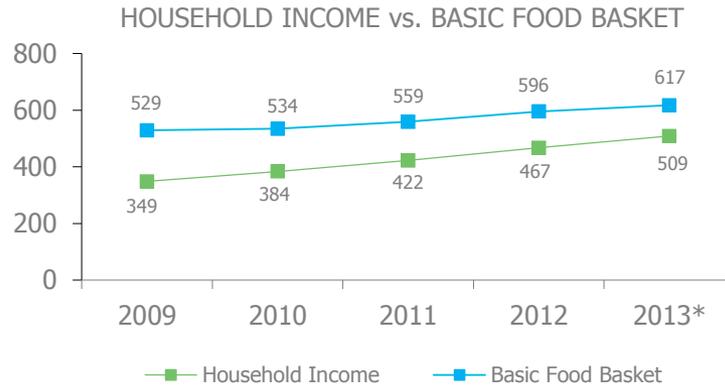
What do Ecuador imports?



From?



1 | Macroindicators
Economics



Household Income

Defined as income of 1.6 percipients of Minimum Salary in a 4 members household, of which only 2 people work

Vital Basket

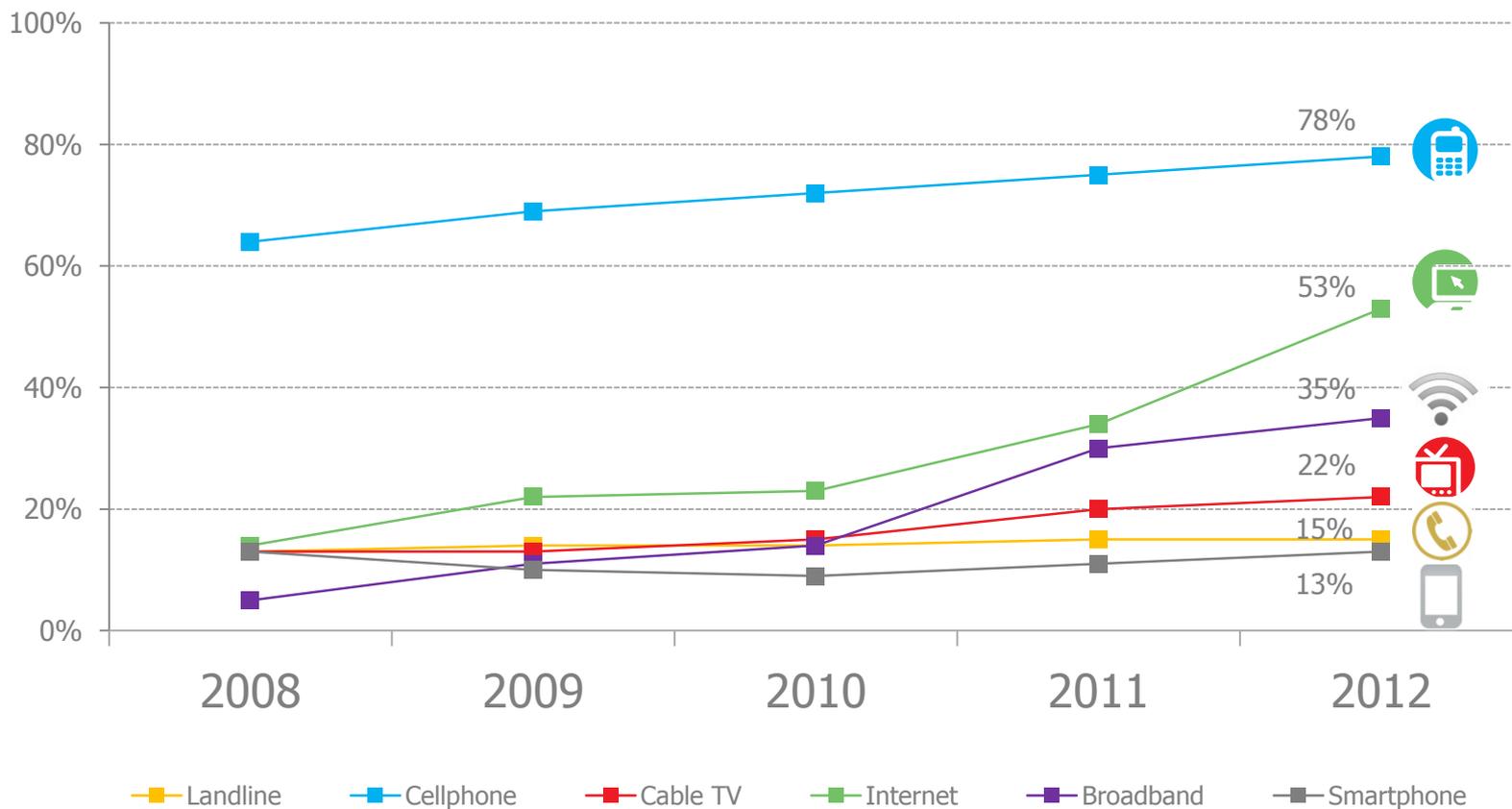
Group of 73 products, in less quantity and quality than basic basket, that marks the limit of survival of a family

Basic Food Basket

Established group of 75 products in order to monitor the raise of prices and their relationship with population income and its consumption capacity

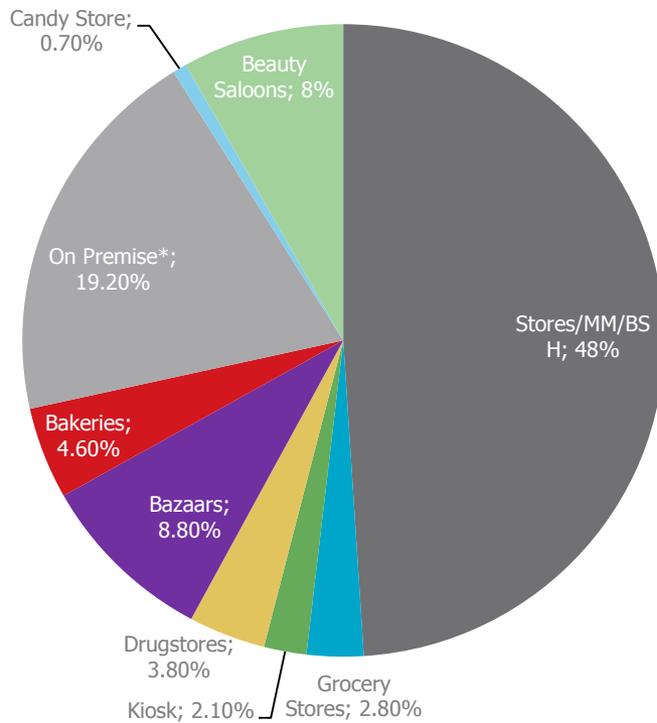
Telecommunications

ACCESS TO TICs IN ECUADOR

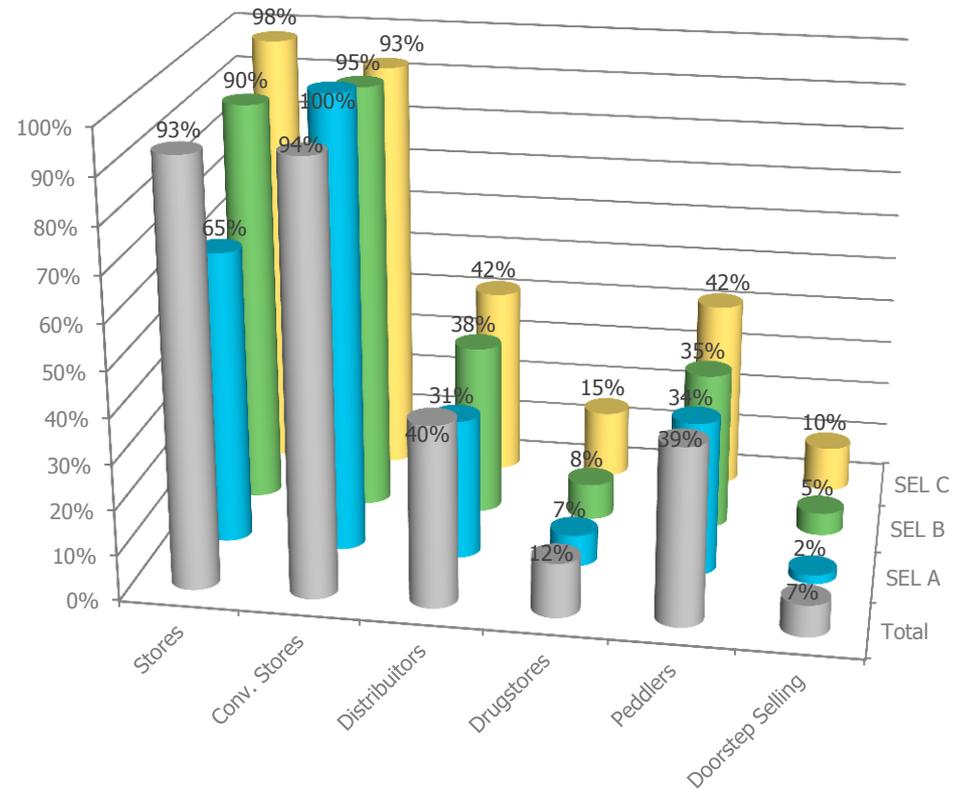


Distribution Channels

TRADITIONAL COMMERCE STRUCTURE IN ECUADOR



PURCHASE CHANNELS PENETRATION (GUAYAQUIL+ QUITO)



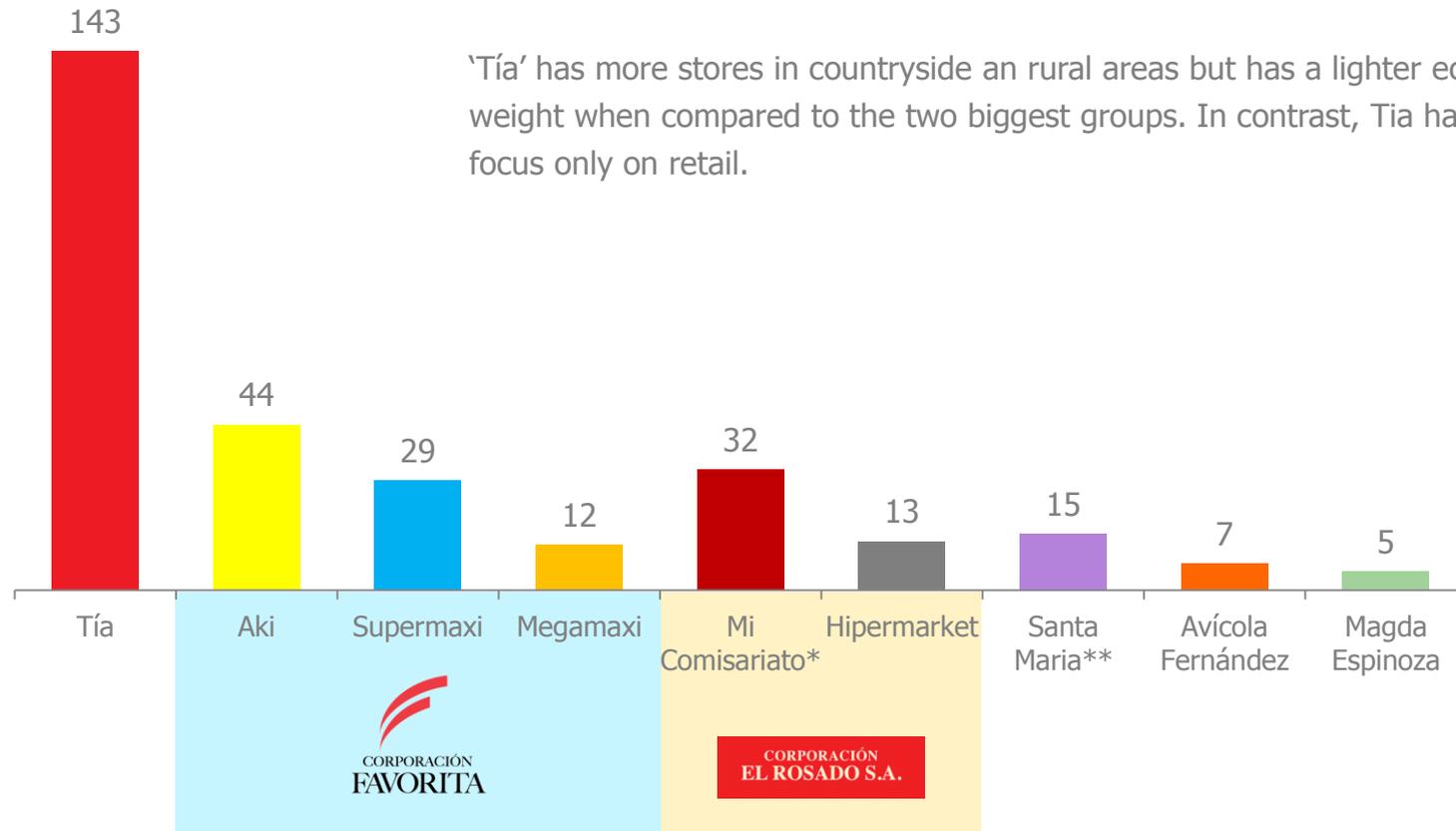
Source: Home Panel IPSA Group.

Source: Store Audit IPSA Group Ecuador 2012.
 MM / BSH: Minimarkets and Beverage Sales at Home.
 On Premise: Consumption in Restaurants, Bars and Clubs.

Stores by Supermarket Brand

'Favorita Corporation' and 'El Rosado' form a strong Oligopoly of Retail in both Guayaquil and Quito; with business branches that have extended to other economic sectors such as Shopping Malls, Cinemas and Media.

'Tía' has more stores in countryside and rural areas but has a lighter economic weight when compared to the two biggest groups. In contrast, Tia has its focus only on retail.



Source: Store Audit IPSA Group Ecuador 2012.

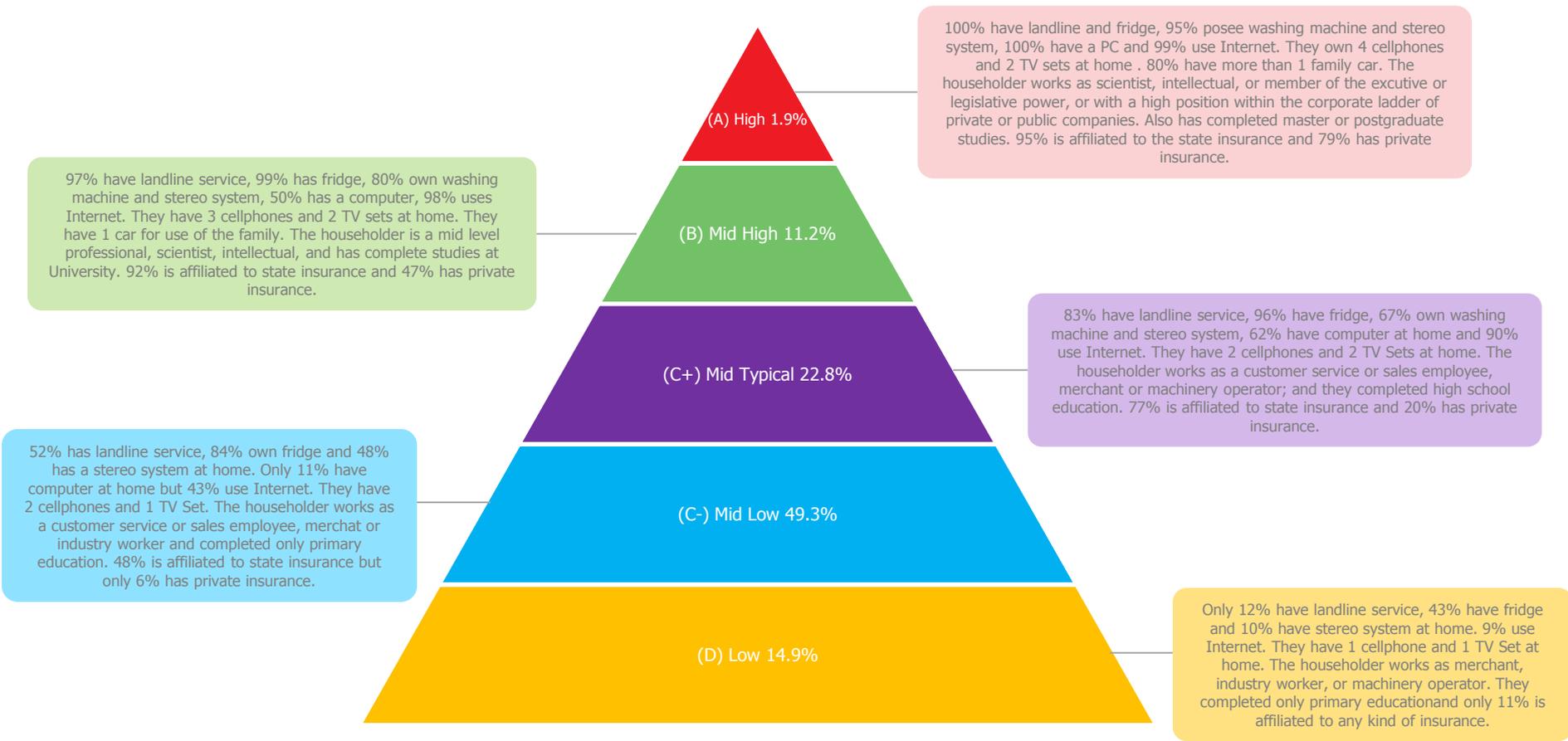
Mi Comisariato* includes: Mini, Mi Comisariato Junior and Mi Canasta.

Santa María** includes: Bodega Mayorista and Srta. María Regalos.

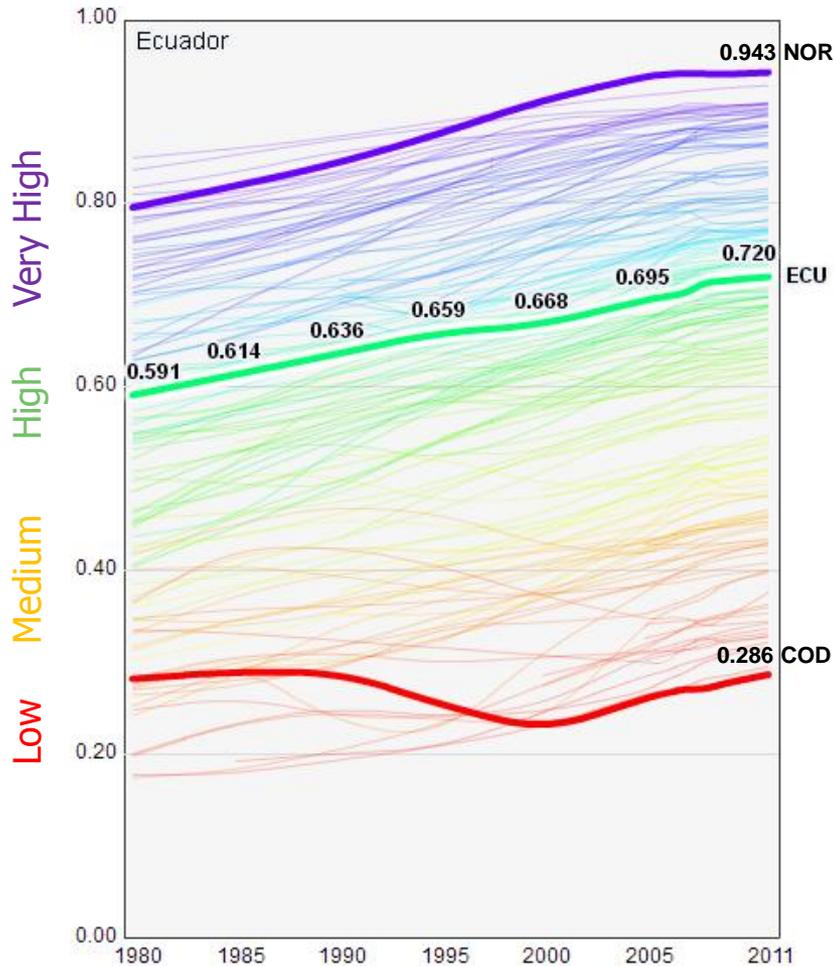


2 | Social Indicators

Household Description by SEL in Ecuador



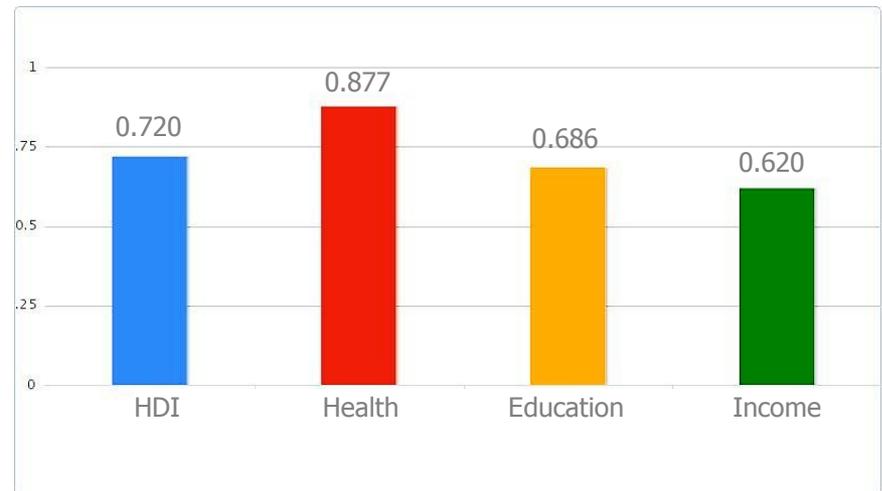
Humand Development Index



Source: Human Development Index Report, ONU 2011.
 NOR: Norway.
 COD: Democratic Republic of Congo

HUMAN DEVELOPMENT INDEX

Health, Education and Income



Despite criticism and opposition from social movements and medis, the government has achieved significant advances improving the quality of life of citizens.

Specially there are notable achievements regarding Health, the reduction of unemployment and the percentage of population below the poverty line.

Also there are initiatives such as assistance to disabled in countryside and rural areas (which has been copied in other countries) and subsidies to the population within the lower stratum, such as: 'The Human Development Bonus'.

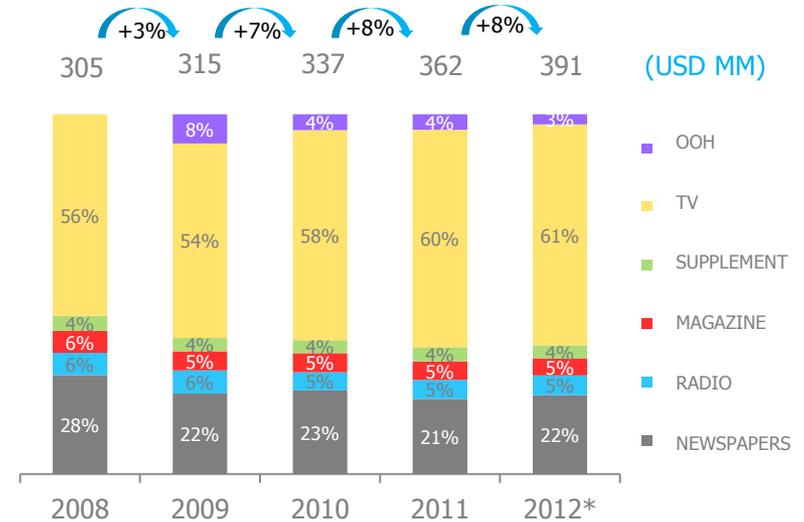
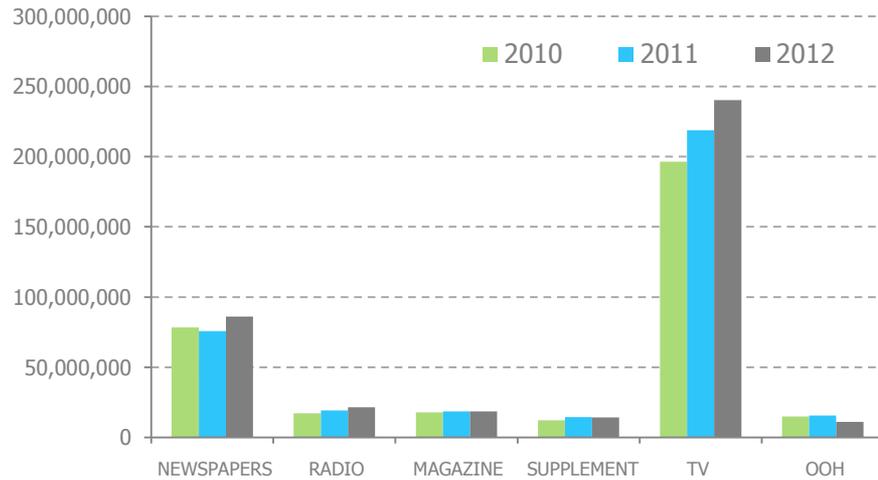


3 | Advertising Industry



3 | Advertising Industry

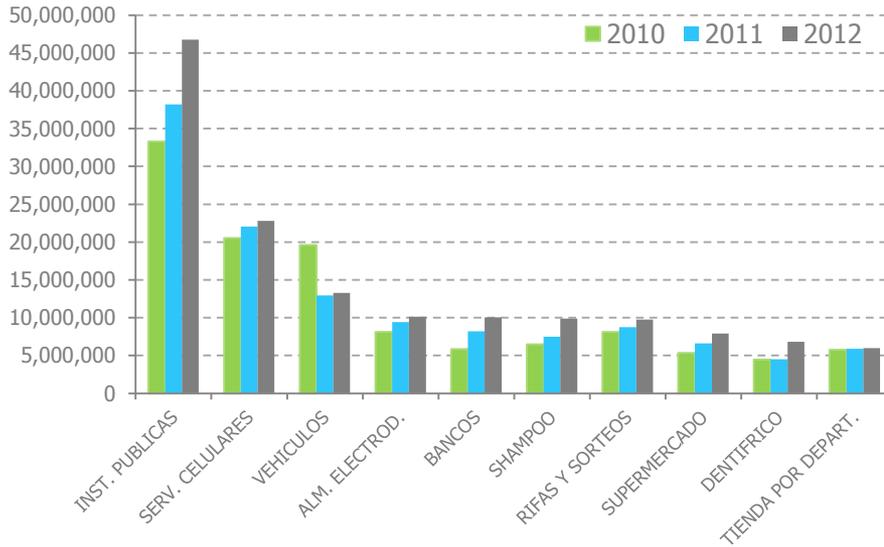
Media Split



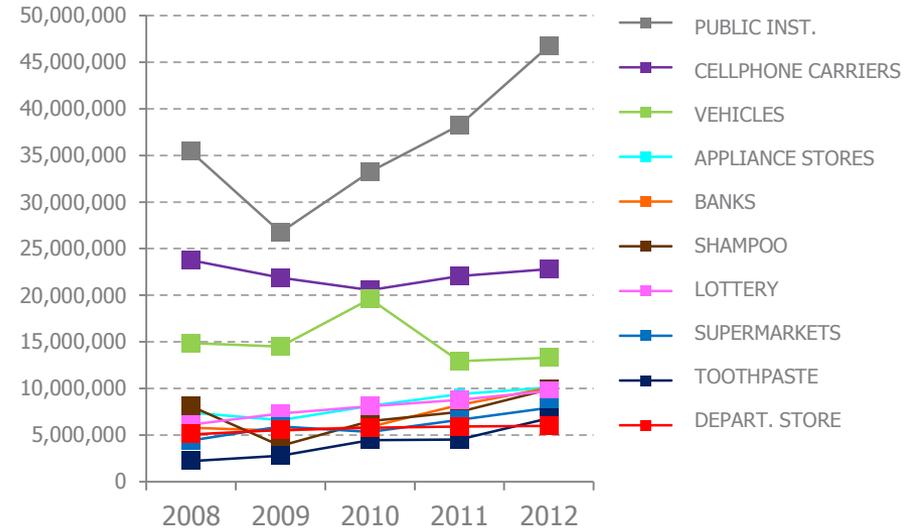
Advertising investment in Outdoor decreased to benefit TV, Radio and Newspapers.

MEDIOS	2008	VAR%	2009	VAR%	2010	VAR%	2011	VAR%	2012
NEWSPAPERS	84,050,587	-16%	70,705,923	11%	78,471,612	-3%	75,780,706	14%	86,227,119
RADIO	19,028,264	6%	20,260,059	-16%	17,053,113	13%	19,253,467	11%	21,381,875
MAGAZINE	18,362,929	-10%	16,590,055	7%	17,780,287	4%	18,451,066	0%	18,401,537
SUPPLEMENT	13,081,265	-12%	11,575,587	6%	12,259,476	18%	14,447,331	-2%	14,171,168
TV	170,926,276	0%	170,344,113	15%	196,479,613	11%	218,908,101	10%	240,237,192
OOH	-	100%	25,436,600	-42%	14,818,176	5%	15,526,528	-29%	11,026,484
TOTAL	305,449,321	3%	314,912,338	7%	336,862,276	8%	362,367,199	8%	391,445,375

Top 10 Categories

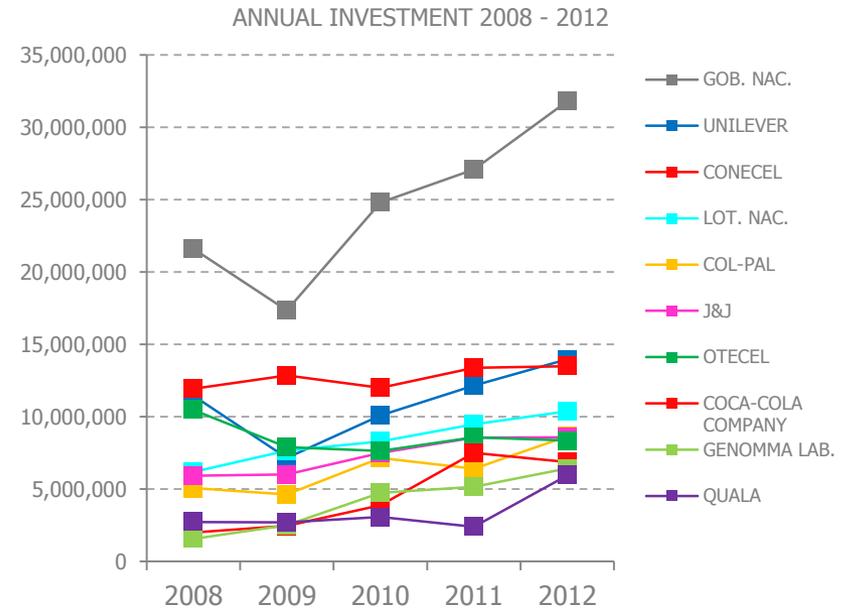
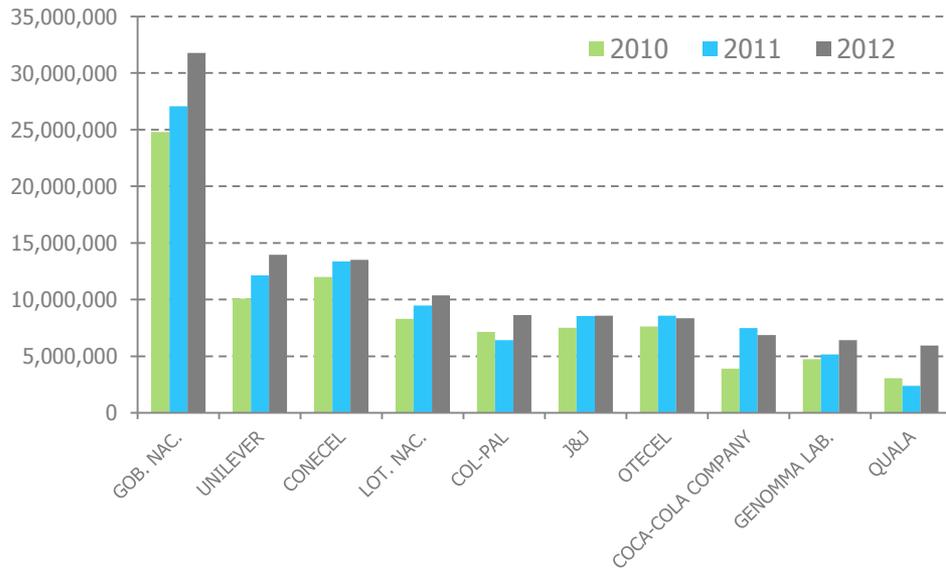


ANNUAL INVESTMENT 2008 - 2012



No.	CATEGORÍA	2008	VAR%	2009	VAR%	2010	VAR%	2011	VAR%	2012
1	PUBLIC INST.	35,399,986	-24%	26,758,876	24%	33,269,035	15%	38,215,130	22%	46,737,261
2	CELLPHONE CARRIERS	23,746,860	-8%	21,869,833	-6%	20,555,688	7%	22,042,070	3%	22,788,905
3	VEHICLES	14,862,074	-2%	14,492,170	35%	19,606,829	-34%	12,940,804	3%	13,288,466
4	APPLIANCE STORES	7,408,416	-11%	6,610,705	23%	8,125,414	16%	9,399,902	8%	10,113,043
5	BANKS	5,783,052	-6%	5,462,167	7%	5,868,434	40%	8,216,451	23%	10,069,160
6	SHAMPOO	8,108,415	-53%	3,833,059	69%	6,476,710	16%	7,495,857	32%	9,900,700
7	LOTTERY	6,123,646	19%	7,297,416	11%	8,102,502	8%	8,760,079	11%	9,743,551
8	SUPERMARKETS	4,409,737	34%	5,900,189	-9%	5,348,682	24%	6,628,630	20%	7,925,601
9	TOOTHPASTE	2,217,480	25%	2,776,492	61%	4,467,013	1%	4,517,582	51%	6,802,386
10	DEPART. STORE	5,072,898	9%	5,543,157	4%	5,791,433	2%	5,906,305	1%	5,978,481

Top 10 Marketers



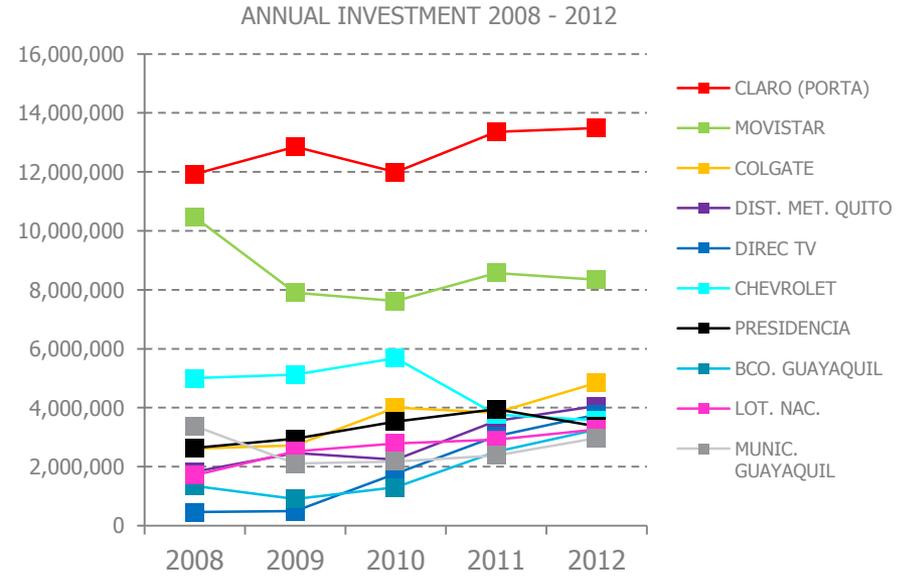
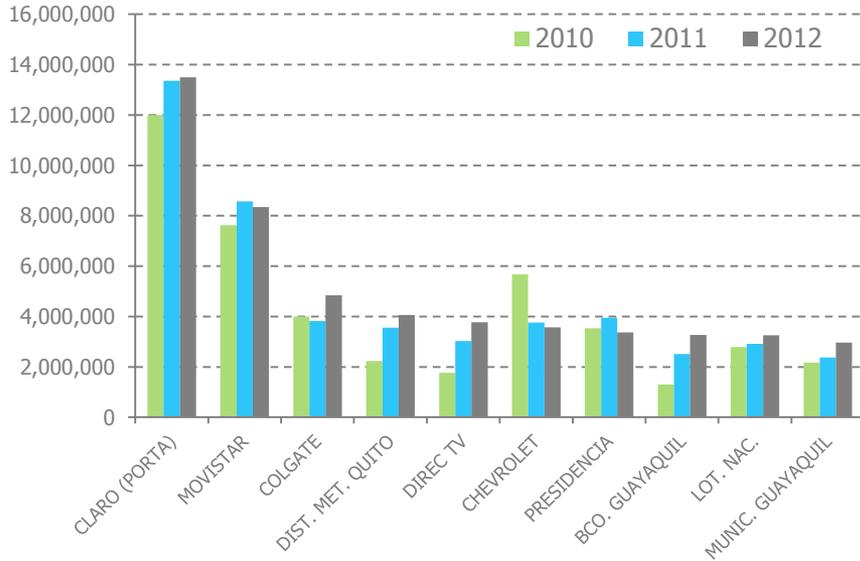
No.	ANUNCIANTE	2008	VAR%	2009	VAR%	2010	VAR%	2011	VAR%	2012
1	GOB. NAC.	21,606,296	-20%	17,350,048	43%	24,812,131	9%	27,078,213	17%	31,788,365
2	UNILEVER	11,440,689	-37%	7,153,442	41%	10,088,762	20%	12,140,314	15%	13,967,633
3	CONECEL	11,922,353	8%	12,854,571	-7%	12,003,052	11%	13,370,911	1%	13,497,134
4	LOT. NAC.	6,192,326	23%	7,643,884	9%	8,295,479	14%	9,468,103	10%	10,375,745
5	COL-PAL	5,063,429	-8%	4,638,059	54%	7,149,486	-10%	6,407,976	35%	8,645,228
7	J&J	5,912,949	2%	6,001,887	25%	7,510,109	14%	8,546,752	0%	8,584,745
6	OTECEL	10,471,724	-25%	7,900,344	-3%	7,624,961	12%	8,577,582	-3%	8,353,241
8	COCA-COLA COMPANY	1,987,866	23%	2,451,119	59%	3,892,305	92%	7,491,435	-8%	6,871,108
9	GENOMMA LAB.	1,562,830	60%	2,505,686	90%	4,748,386	9%	5,158,565	24%	6,417,658
10	QUALA	2,727,166	-1%	2,708,339	13%	3,064,607	-22%	2,392,504	149%	5,953,800

Source: Ibope Time Ecuador (Next). Published Rate, Discounted.



3 | Advertising Industry

Top 10 Brands



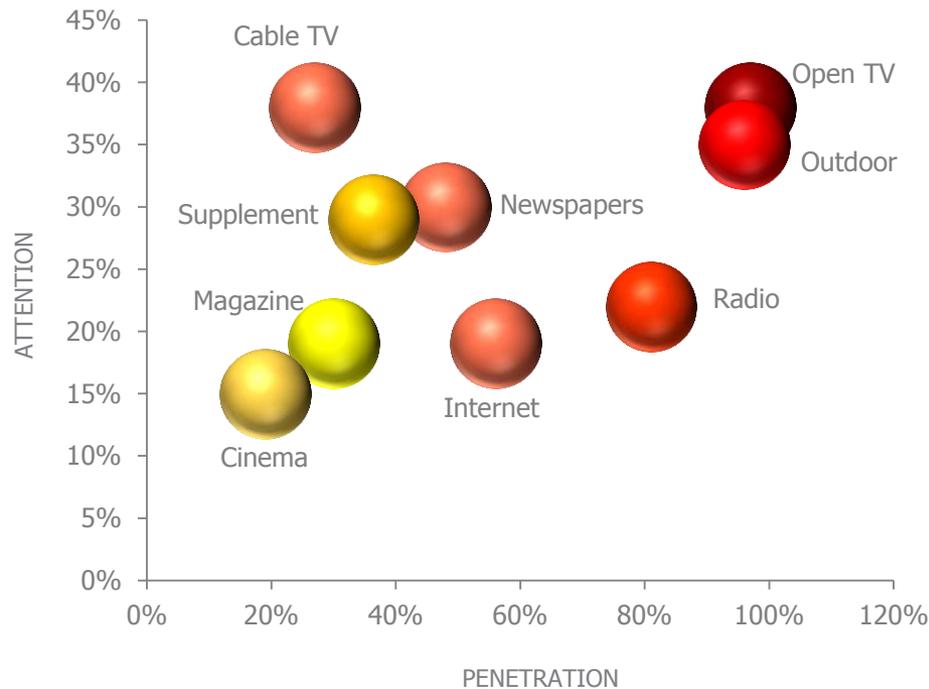
No.	MARCAS	2008	VAR%	2009	VAR%	2010	VAR%	2011	VAR%	YTD 2012
1	CLARO (PORTA)	11,924,446	8%	12,848,083	-7%	11,990,299	11%	13,353,290	1%	13,492,760
2	MOVISTAR	10,466,543	-25%	7,896,508	-4%	7,619,930	12%	8,571,390	-3%	8,343,134
3	COLGATE	2,615,253	4%	2,726,185	47%	4,002,785	-4%	3,827,378	26%	4,840,556
4	DIST. MET. QUITO	1,833,395	34%	2,461,672	-9%	2,233,467	59%	3,555,153	14%	4,055,283
5	DIREC TV	458,078	7%	492,036	258%	1,763,861	72%	3,031,429	24%	3,768,833
6	CHEVROLET	5,003,273	2%	5,128,333	11%	5,678,761	-34%	3,764,327	-5%	3,574,699
7	PRESIDENCIA	2,640,476	12%	2,945,453	20%	3,533,107	12%	3,946,126	-15%	3,367,620
8	BCO. GUAYAQUIL	1,349,468	-33%	905,722	43%	1,299,200	93%	2,509,997	30%	3,262,985
9	LOT. NAC.	1,709,664	48%	2,522,963	11%	2,788,541	4%	2,911,670	12%	3,259,374
10	MUNIC. GUAYAQUIL	3,378,736	-38%	2,108,195	3%	2,175,393	9%	2,378,434	25%	2,969,492

Source: Ibope Time Ecuador (Next). Published Rate, Discounted.



4 | General Media Consumption

Penetration vs. Attention to Media



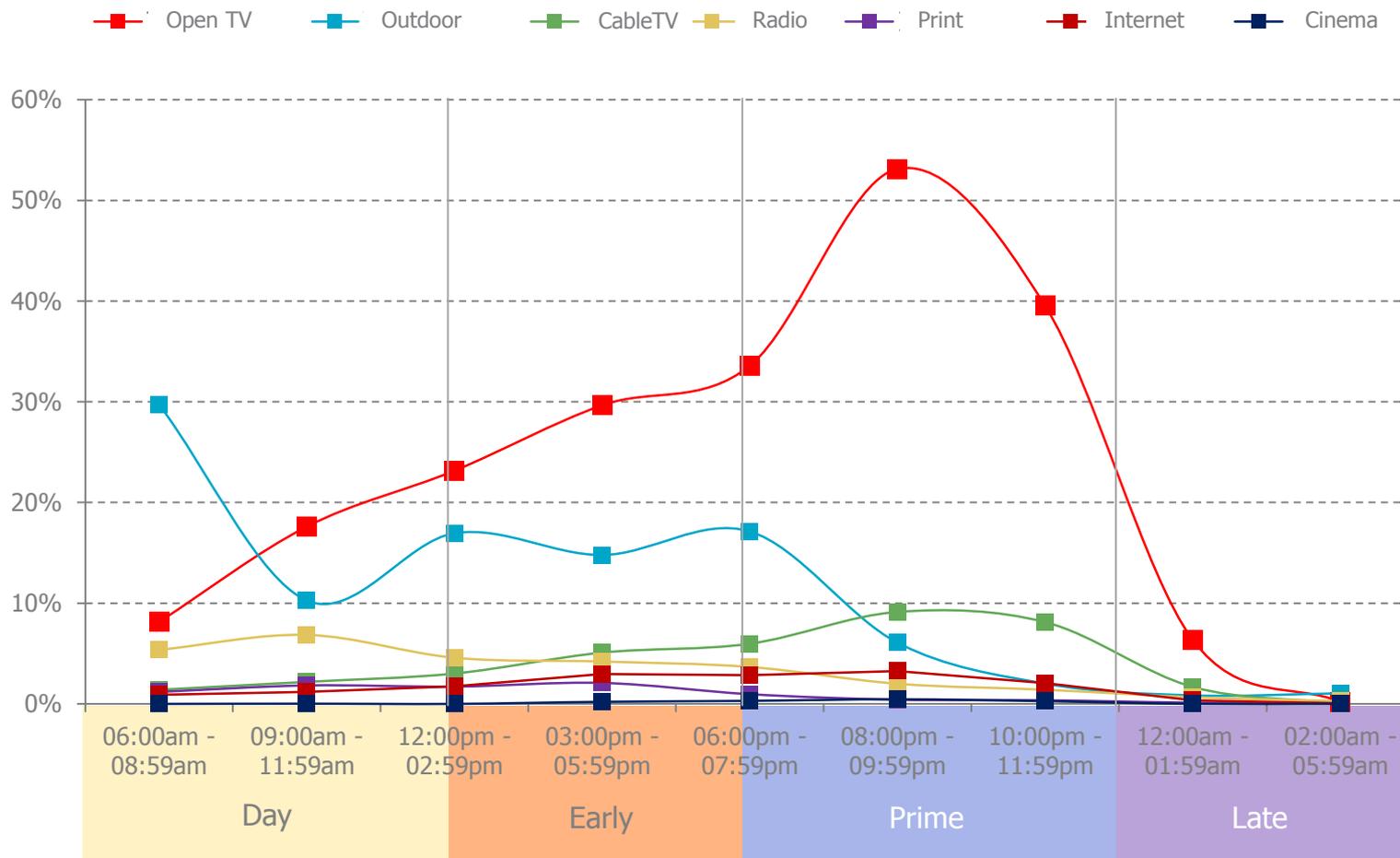
MEDIA	PENET.	AFF.	ATT.
NEWSPAPERS	48%	100	30%
MAGAZINE	30%	100	19%
OPEN TV	97%	100	38%
CABLE TV	27%	100	38%
RADIO	81%	100	22%
CINEMA	19%	100	15%
OUTDOOR	96%	100	35%
INTERNET	56%	100	19%
SUPPLEMENT	36%	100	29%

Outdoor and Open TV are the media with most Penetration and Attention within the country.

Magazines and Cinema remains as niche media.

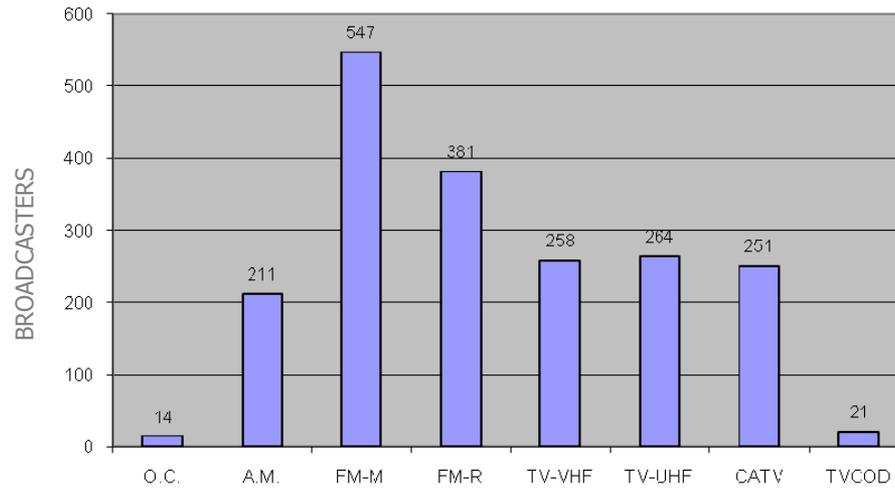
In general terms, all media the usage depends on its characteristics and the target, and campaign objectives as well.

Media Audience By Daypart

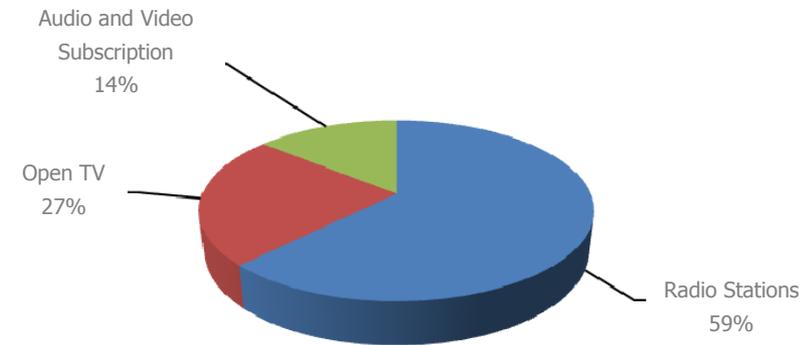


TV Channels and Radio Stations in Ecuador

NUMBER OF RADIO STATIONS AND TV CHANNELS
WITHIN THE NATIONAL TERRITORY (DIC 2012)



RADIO STATIONS, TV CHANNELS, AND
AUDIO OR VIDEO SUBSCRIPTION SYSTEMS



SERVICE	No. STATIONS	%
Radio Stations	1,153	59%
Open TV	522	27%
Audio and Video Subscription**	274	14%
TOTAL	1,949	100%

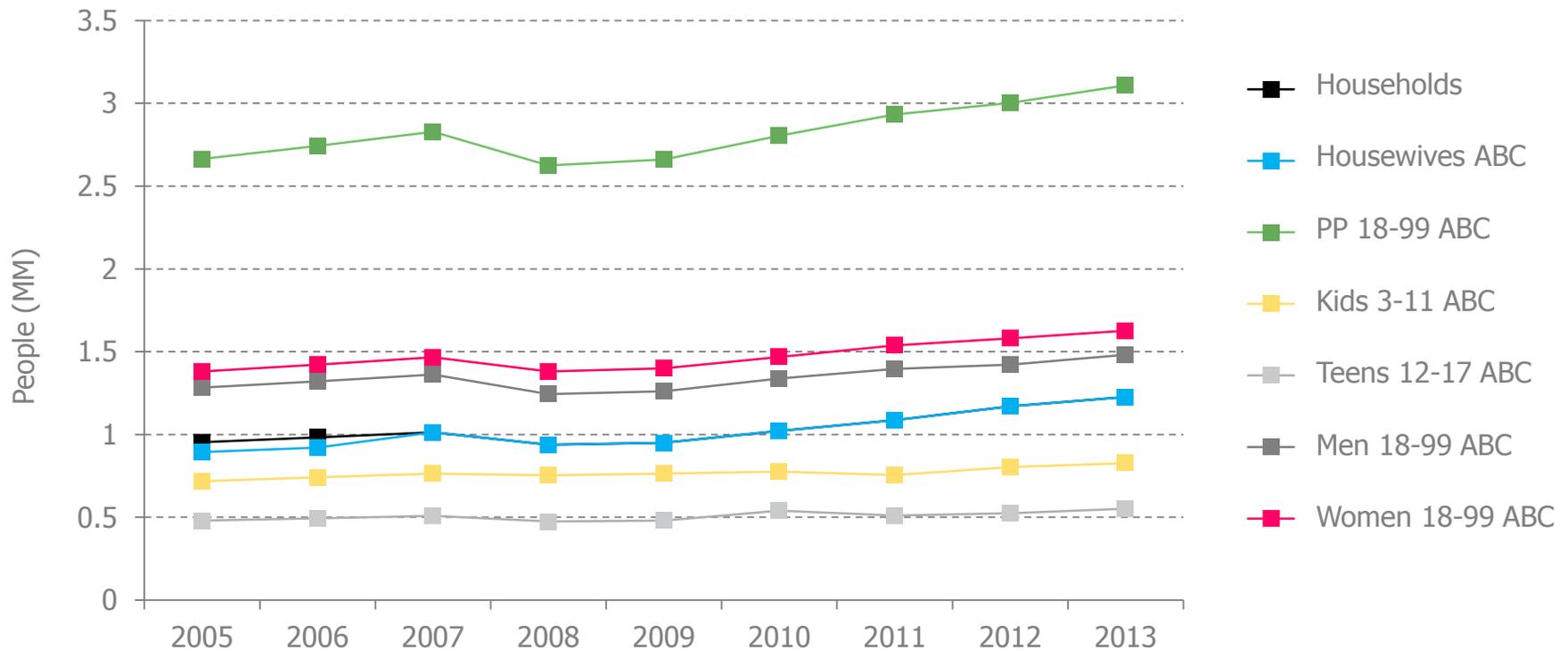
* Includes main stations and relay. ** Includes 2 systems of coded satellite A/V



5 | Open TV



Evolution of TV Universes in Ecuador



Source: IBOPE Ecuador, TV Data 4.0

Nota: Since 2007 the universes of Housewives and Households were unified cause the industry set the correspondence of a single Housewife per Household.

Highlights



Leader TV Channel in Highlands

- This TV Channel experienced a lower share of audience but remains among the top 3.
- They respect the commercial spaces, but tend to work with Discounts per volume instead of CPR. They also keep higher costs within their commercial structure.
- They have a significative local production, including news programs, of a good quality with a heavier weight in comedies.
- Its performance can be measured national but they keep signals apart for Guayaquil and Quito.
- In their Programming it's reflected their contracts with Telemundo and the brazilian Globo.

Soap Operas and TV News Leadership





Strong Competitor in Guayaquil

- This TV Channel is property of mexican Ángel Gonzáles.
- It grew in national share thanks to the Reality Show "Combate", within the Prime Time.
- They have successfully implemented a sensationalist and informal tone among all their news programs, achieving high rating levels for these tv programs.
- They have kept during several years the talk show "Vamos Con Todo" with acceptable rating levels within the EARLY, and the Sports News Program "Copa" that has editions in DAY and PRIME.
- They manage a very flexible commercial platform that moves among: CPR, Discounts per Volume, and Sponsorships.

Reality Shows & Sensationalism



Highlights



Strong TV Channel in Highlands

- It's the 2nd TV Channel in Highlands and 4th in the national ranking.
- This channels puts an important weight of national production in their programming, specially comedies, TV magazines and Investigation Journalism.
- The News Program "24 Horas" is not the one with most audience in the nights but it's the most expensive.
- It divides its programming among Televisa and TV Azteca from Mexico.
- The entire national production is sold as sponsorship (Spots + Mention + TV Billboards).
- A drawback is that despite having national marketing this channel has divided signals for Guayaquil and Quito, Hence, sometimes, the buy implies one tv program in Guayaquil and another completely different in Quito.

Kids Programming, Soap Operas and Investigation



Highlights



Targeted to housewives in the highlands

- TV Channel seized by the Government.
- The strength of this TV Channel resides in Soap Operas from Televisa Mexico, or RCN and Caracol from Colombia.
- The prior fact, besides of an strong position in the highlands audience makes it a key channel to reach hosewives in this region of the country.
- As TC, Canal Uno and EcuadorTV, it also has the rights to broadcast the Ecuadorian Soccer Championship.

Soap Operas and dramatic Reality Shows



Highlights



Strong Performance in Guayaquil and Coast

- TV Channel seized by the Government
- It has its strenght in Guayaquil and the Coast, region whose demographic weight puts this channel in direct competition with RTS and Ecuavisa to achieve the national leadership.
- TC has franchises to produce local versions of successful Contest Shows from Venezuela and this has brung a noticeable raise to the ratings. They also broadcast colombian soap operas and venezuelan old ones (from 80s) which achieve PRIME TIME Ratings during EARLY fringe, sometimes with 45% of share.
- This TV Channel is wide open to negotiations.
- Currently they have the 2nd best Contest TV Program called 'Calle 7', in the EARLY fringe which competes in the same genre than 'Combate' from RTS, but this one is broadcasted in PRIME TIME.

Strong Position in the Coast



Highlights



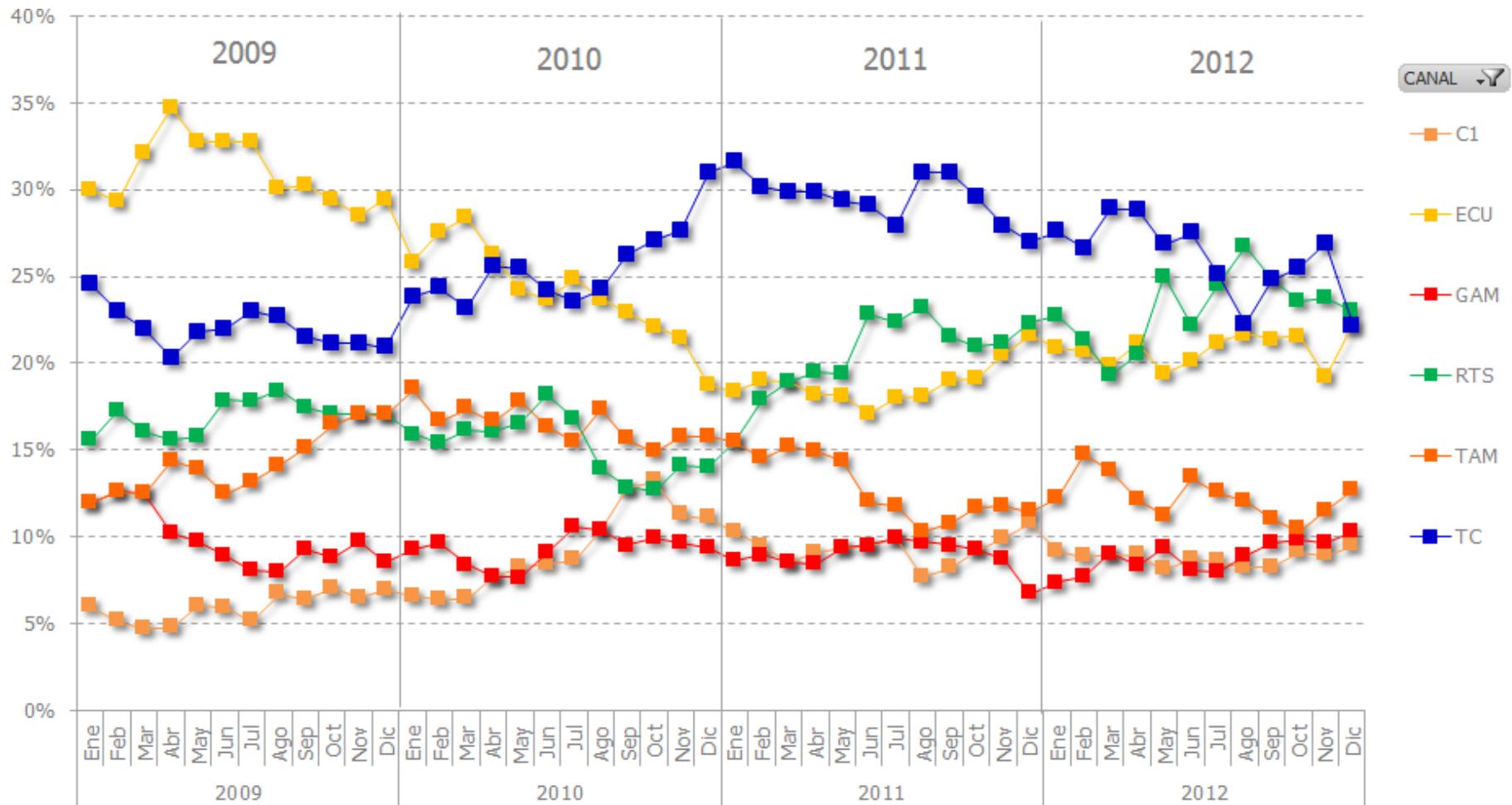
Focus on Low SEL

- This channel is the lowest ranked in the national ranking, and also by city.
- Canal Uno abandoned its sports profile to open its programming to mainstream content, but giving it a 'ghetto' touch.
- They implemented sensationalist tv programs such as: "En Carne Propia" and "En La Polémica".
- They also bought the rights to broadcast the Contest Show of Argentina "Show Match" with a relative success.
- Usually they negotiate under CPR figures and due to their low share they are open to several formats of advertising activity that other channels don't allow.
- Hence, they give the opportunity to marketers that wouldn't normally air their brands, to do so.

New changes in the Programming

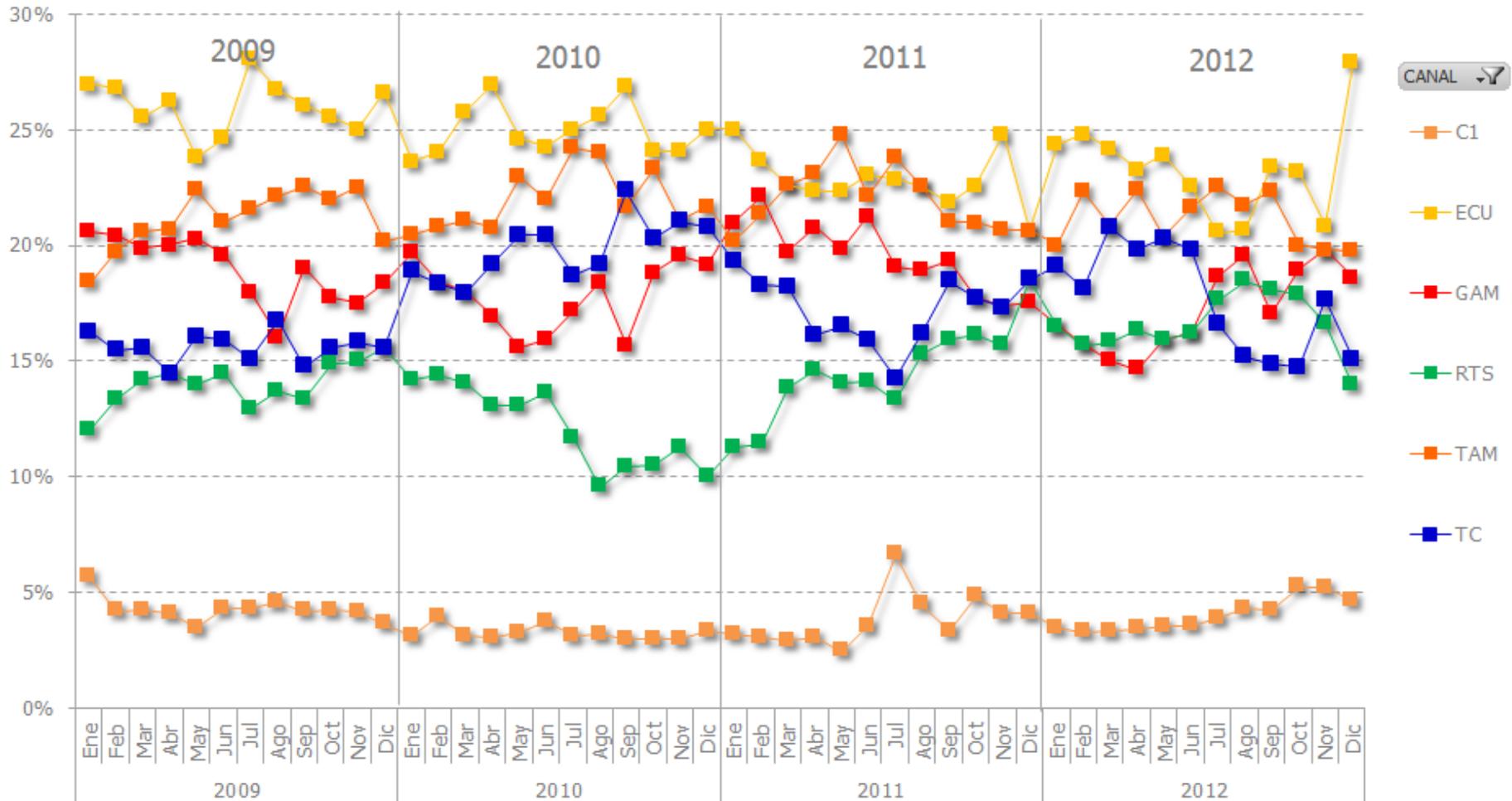


Audience Share **Guayaquil**



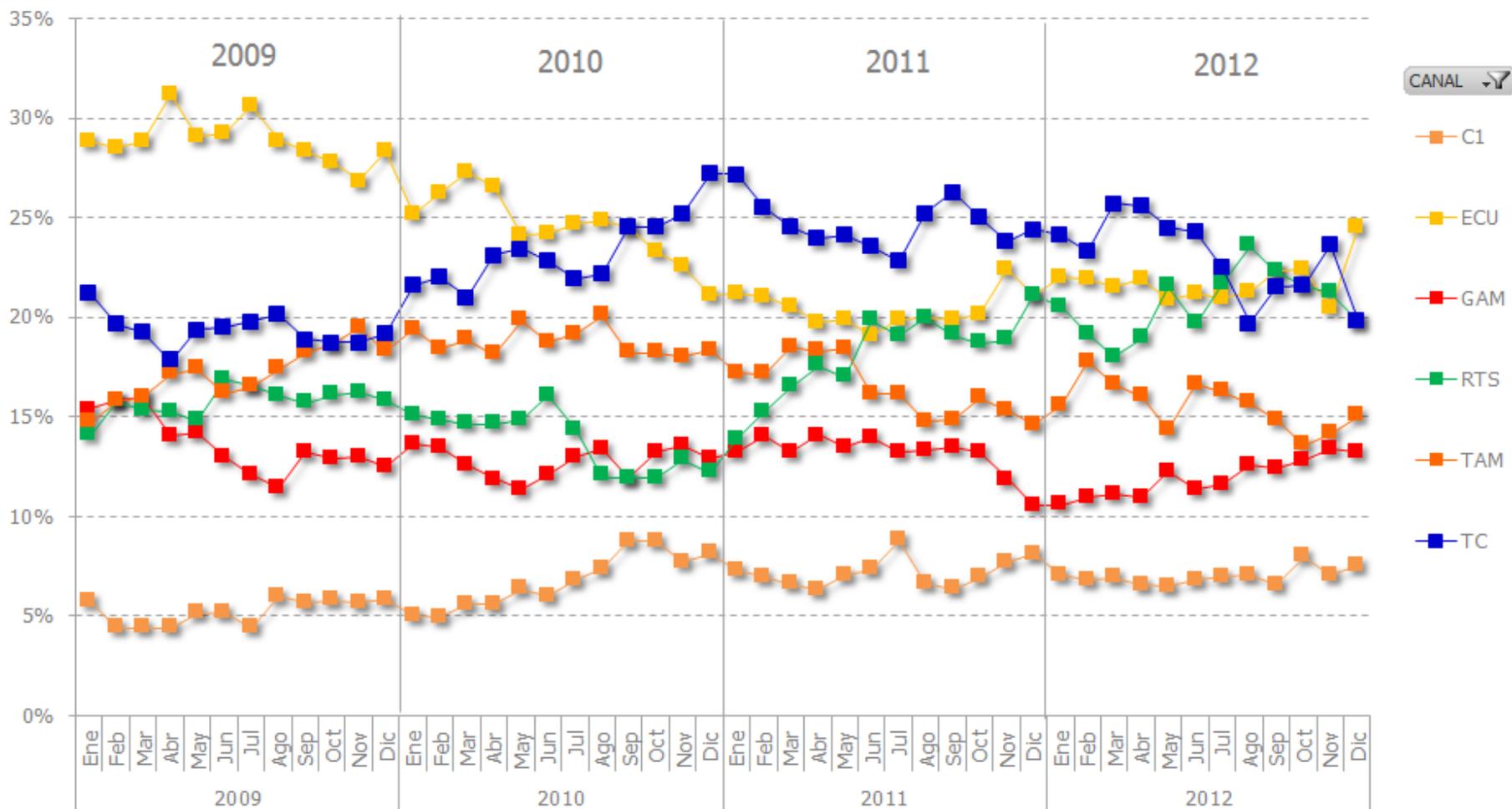
Source: IBOPE Time, TV Data. Target: Total Housewives, All Day.

Audience Share Quito



Source: IBOPE Time, TV Data. Target: Total Housewives, All Day.

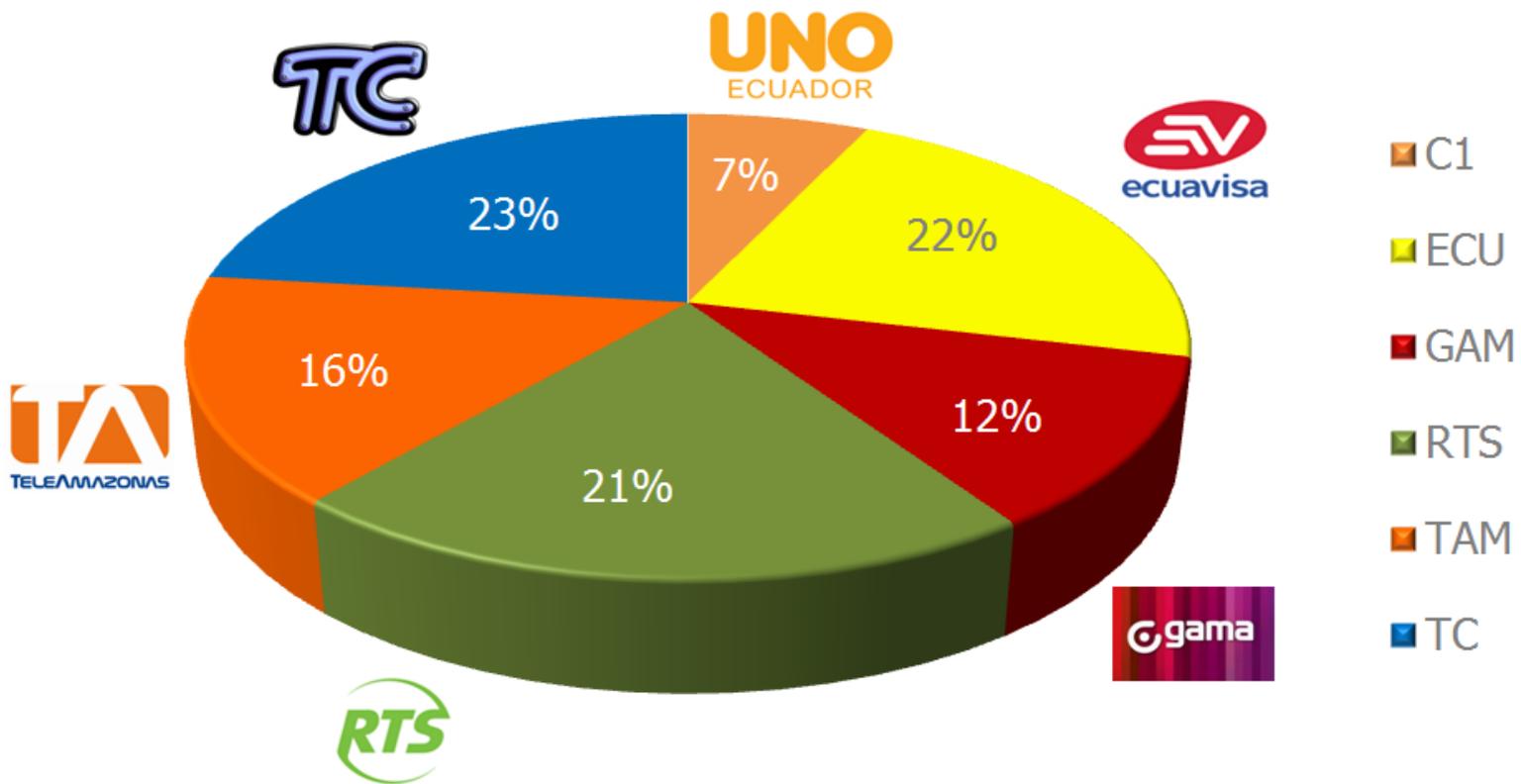
Tendencia Share Consolidated



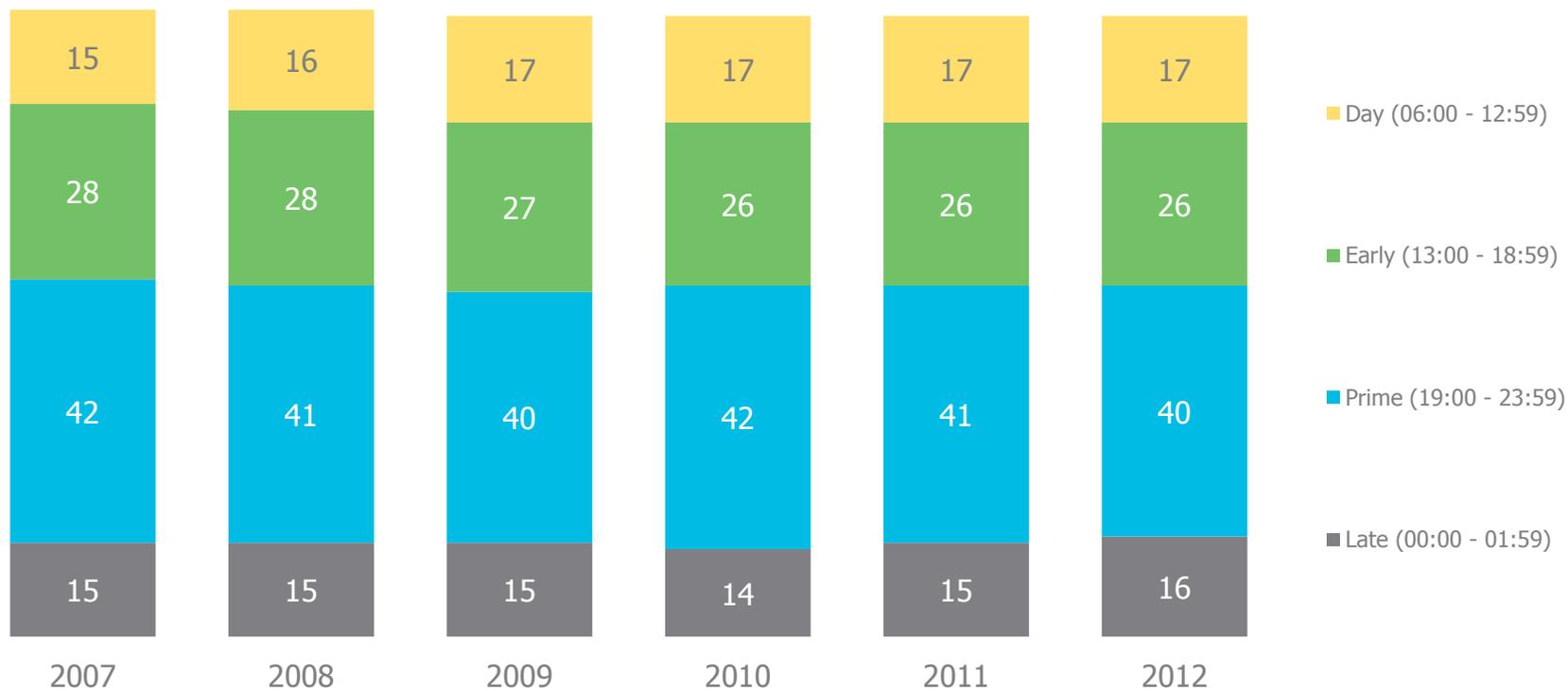
Source: IBOPE Time, TV Data. Target: Total Housewives, All Day.

Open TV Channels

AUDIENCE SHARE HOUSEWIVES ABC
JAN – DEC 2012



HUT Evolution by Daypart



Changes in the TV Landscape

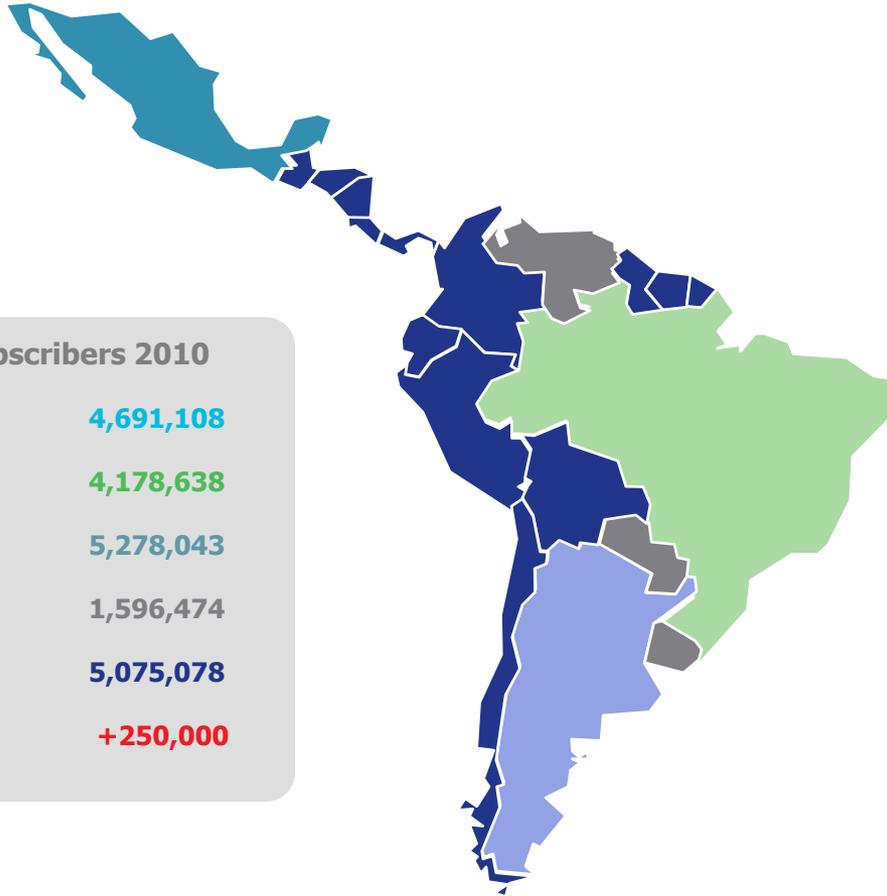
- The business model has its focus on the CPR, except Ecuavisa that keeps managing discounts levels that may vary according to investment.
- The clients are generally looking for efficiency at any cost, sacrificing innovation and creativity.
- Por el incremento en la competitividad y los costos en TV, los grandes anunciantes están optando por la reducción de secundajes para optimizar costos y TRPs.
- A new state regulation will reduce the commercial airtime, within a TV Program, from 18 to 12 minutes. This fact, along with the political campaigns early in 2013 will cause an important raise of rates. Hence, this year is expected a 60% of media inflation.





6 | Cable TV

Cable TV Coverage



Subscribers 2010	
MEX	4,691,108
BRA	4,178,638
ARG	5,278,043
VEN	1,596,474
LTA	5,075,078
ECU	+250,000

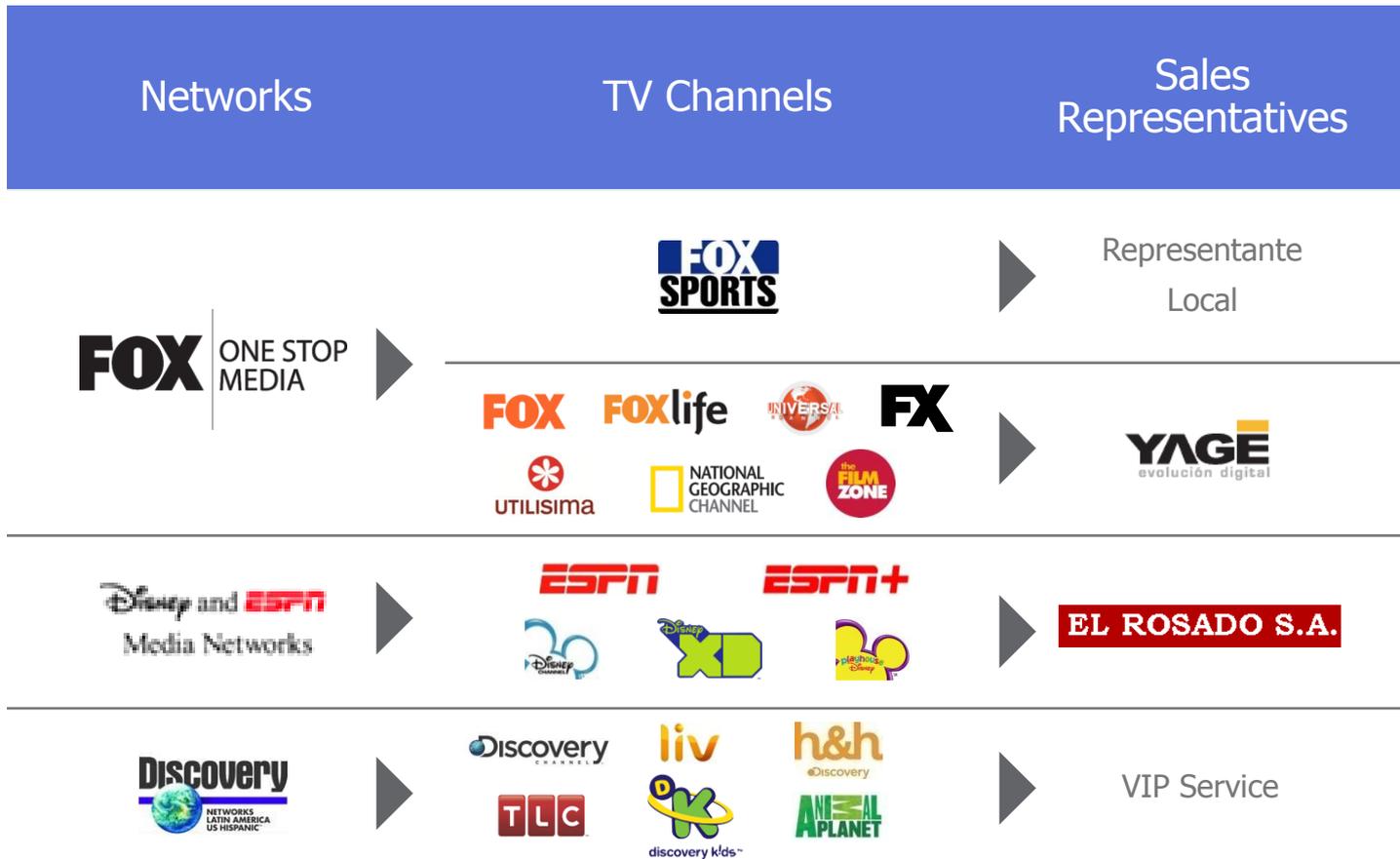
Andean Feed / Latam

- Ecuador is located within the Andes (or Latinamerican) Feed.
- In most part of networks, Ecuador shares signal coverage with Central America and the countries along de Andean Region from Venezuela to Chile.
- Major part of Cable vendors have local representative offices here, which makes easier to buy commercial spaces in Regional Cable TV from Ecuador, when it comes to products or promotion that are marketed only in Ecuadorian territory.
- It's also possible to buy commercial spaces to specific cable operators but the audience reduces -30% since it's not bought to networks. Doing it this way the message will arrive only to specific subscribers and will not consider other cable operators and FTA users.

Viewable Networks in Ecuador

 <small>A Time Warner Company</small>			 <small>NETWORKS LATIN AMERICA US HISPANIC</small>		
        	       	       	     	    	  

Networks With Local Representatives



Note: Turner it's bought from Miami and Sony Pictures in Panama City.



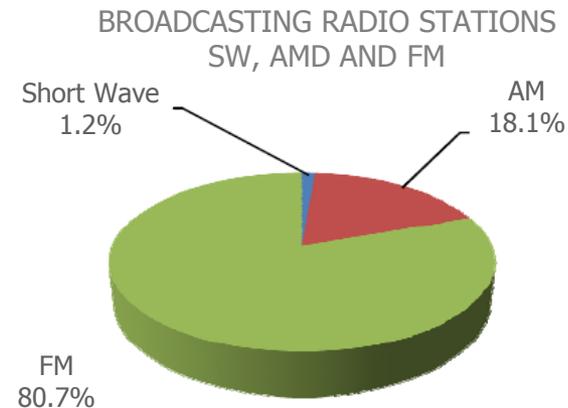
7 | Radio

Ecuadorian Radios

A Mixed Picture

- The Radio is one of media with most penetration in Ecuador (81%).
- There are several radio stations (AM and FM) and genres as well. Most part of stations are considered music radio stations but they use to have news programs and variety talk shows within their programming.
- News programs and sports programs are the ones with more audience.
- The mainstream music genres in Ecuador are: **Tropical Music, Music from 60s and 70s, and World Music in Spanish.**
- The audience survey in Ecuador is provided by 'Tendencias', a Local Research company, which is associated to Infomedia, the company that monitors the local Advertising Investment.

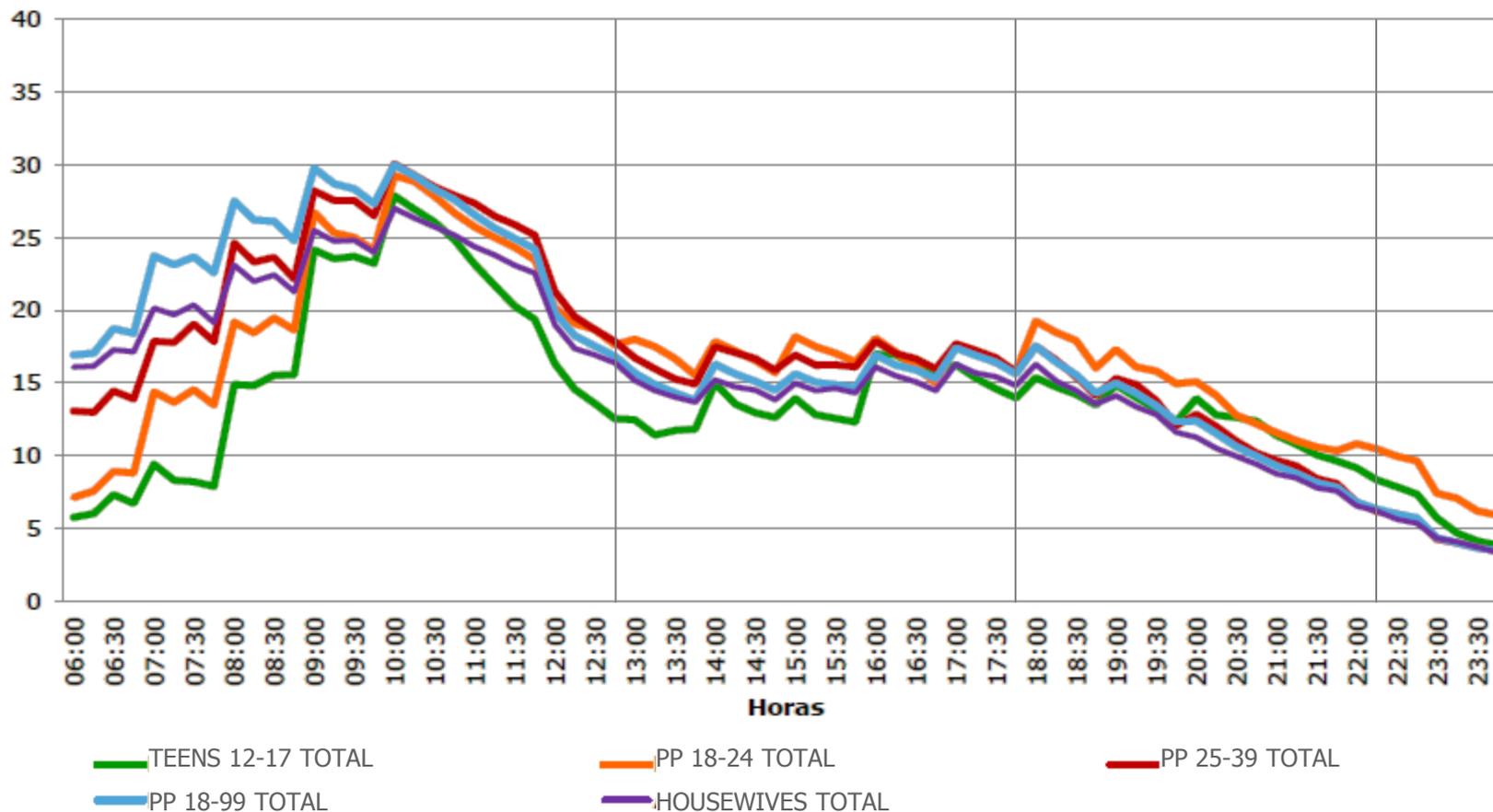
Thanks to their broad coverage and low costs, the Radio in Ecuador is a traditional support media for FMCG campaigns in Ecuador.



FM	No. Stations	%
Matrix	541	59%
Repeaters	381	41%
Total FM	922	100%

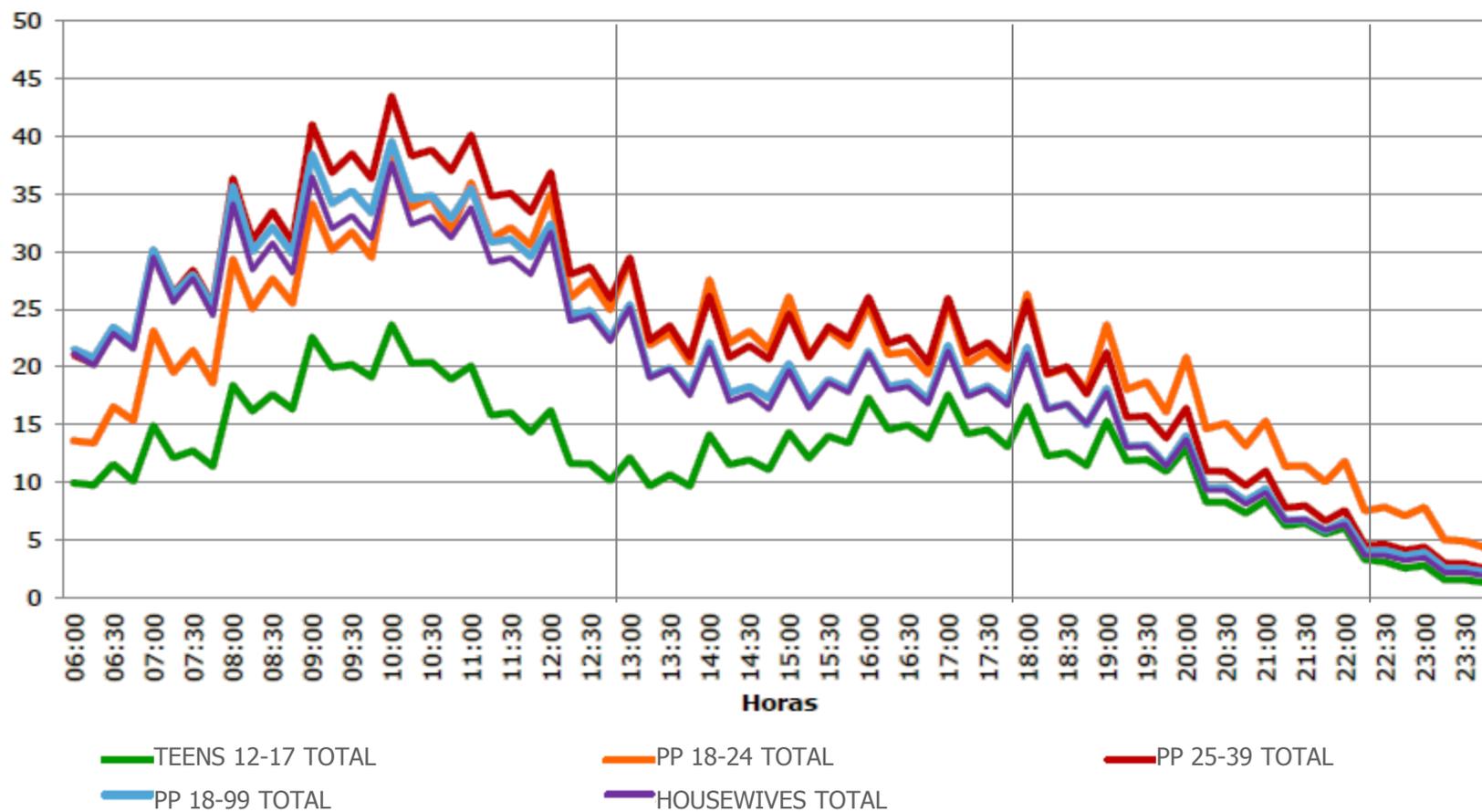
Source: Supertel, TGI Ecuador.

Audience Mon-Fri Guayaquil



Source: 'Tendencias' Research Company, Oct 2012.

Audience Mon-Fri Quito



Source: 'Tendencias' Research Company, Oct 2012.

Ranking Guayaquil

Total Audience

Total PP 18-99

RANKING DE EMISORAS GUAYAQUIL				HOM-MUJ 12-99 TOTAL					
MEDIO	GENERO	DIAL	FRE	LunesAViernes			SabadosYDomingos		
				Rating	Share	Oyentes	Rating	Share	Oyentes
LA OTRA (GYE)	TROPICAL	94.9	FM	3.30	19.19	60,102	2.96	18.91	53,953
CANELA (GYE)	TROPICAL	90.5	FM	1.89	11.02	34,528	1.55	9.90	28,240
CRISTAL (GYE)	NOTICIAS	870	AM	1.33	7.76	24,295	1.15	7.35	20,968
DISNEY (GYE)	POP/JUVENIL	93.7	FM	1.15	6.72	21,060	1.01	6.46	18,431
AMERICA (GYE)	TROPICAL	93.3	FM	0.79	4.60	14,400	0.68	4.35	12,421
MAS CANDELA (GYE)	TROPICAL	96.9	FM	0.62	3.61	11,319	0.57	3.62	10,328
ONDA POSITIVA	TROPICAL	94.1	FM	0.58	3.37	10,546	0.51	3.23	9,219
CARAVANA (GYE)	DEPORTES	750	AM	0.47	2.75	8,609	0.46	2.96	8,454
DI BLU	DEPORTES	88.9	FM	0.45	2.62	8,202	0.50	3.20	9,120
FABU STEREO	ROMANTICA	105.7	FM	0.43	2.48	7,777	0.37	2.37	6,748
RUMBA (GYE)	TROPICAL	107.3	FM	0.42	2.47	7,724	0.46	2.92	8,328
ANTENA 3	TROPICAL	91.7	FM	0.41	2.41	7,546	0.39	2.46	7,030
AGUILA	ROMANTICA	1050	AM	0.35	2.03	6,352	0.33	2.08	5,939
ROMANCE	ROMANTICA	90.1	FM	0.26	1.53	4,805	0.24	1.52	4,334
GALAXIA STEREO (GYE)	TROPICAL	88.5	FM	0.25	1.44	4,526	0.22	1.42	4,061
SUCRE (GYE)	NOTICIAS	700	AM	0.25	1.43	4,489	0.19	1.23	3,522
ESTRELLA	TROPICAL	92.1	FM	0.24	1.39	4,344	0.29	1.85	5,280
ONDA CERO (GYE)	POP/JUVENIL	96.1	FM	0.24	1.38	4,313	0.27	1.73	4,924
MORENA FM (GYE)	TROPICAL	98.1	FM	0.23	1.32	4,126	0.21	1.31	3,743
MORENA AM (GYE)	NOTICIAS	640	AM	0.20	1.19	3,735	0.18	1.18	3,371
PUNTO ROJO	POP/JUVENIL	89.7	FM	0.20	1.17	3,659	0.18	1.15	3,287
TROPICALIDA STEREO (GYE)	TROPICAL	91.3	FM	0.20	1.15	3,594	0.21	1.33	3,788
CUPIDO	ROMANTICA	95.3	FM	0.19	1.11	3,467	0.14	0.90	2,580
ONCE Q	MUSICA EN	104.9	FM	0.15	0.87	2,727	0.13	0.83	2,361
CORAZON	ROMANTICA	104.5	FM	0.15	0.86	2,697	0.13	0.83	2,379
SISTEMA DOS	NOTICIAS	1080	AM	0.14	0.81	2,527	0.18	1.16	3,300
CENTRO (GYE)	ROMANTICA	97.7	FM	0.13	0.74	2,332	0.12	0.75	2,140
FUEGO	ROMANTICA	106.5	FM	0.12	0.72	2,247	0.10	0.65	1,852
ELITE	MUSICA EN	99.7	FM	0.12	0.72	2,246	0.11	0.71	2,017
METRO STEREO (GYE)	POP/JUVENIL	95.7	FM	0.12	0.70	2,188	0.13	0.82	2,353

RANKING DE EMISORAS GUAYAQUIL				HOM-MUJ 18-99 TOTAL					
MEDIO	GENERO	DIAL	FRE	LunesAViernes			SabadosYDomingos		
				Rating	Share	Oyentes	Rating	Share	Oyentes
LA OTRA (GYE)	TROPICAL	94.9	FM	3.35	19.03	52,250	3.01	18.92	46,967
CANELA (GYE)	TROPICAL	90.5	FM	1.99	11.32	31,063	1.59	10.02	24,887
CRISTAL (GYE)	NOTICIAS	870	AM	1.50	8.55	23,481	1.28	8.07	20,044
DISNEY (GYE)	POP/JUVENIL	93.7	FM	0.87	4.95	13,587	0.75	4.71	11,703
AMERICA (GYE)	TROPICAL	93.3	FM	0.83	4.73	12,992	0.72	4.51	11,190
ONDA POSITIVA	TROPICAL	94.1	FM	0.60	3.40	9,339	0.51	3.18	7,905
CARAVANA (GYE)	DEPORTES	750	AM	0.54	3.05	8,384	0.52	3.29	8,162
DI BLU	DEPORTES	88.9	FM	0.50	2.82	7,743	0.54	3.39	8,420
RUMBA (GYE)	TROPICAL	107.3	FM	0.47	2.65	7,269	0.51	3.24	8,038
ANTENA 3	TROPICAL	91.7	FM	0.45	2.54	6,975	0.41	2.59	6,435
FABU STEREO	ROMANTICA	105.7	FM	0.42	2.36	6,479	0.34	2.16	5,374
MAS CANDELA (GYE)	TROPICAL	96.9	FM	0.41	2.34	6,435	0.33	2.10	5,202
AGUILA	ROMANTICA	1050	AM	0.39	2.24	6,143	0.35	2.17	5,388
SUCRE (GYE)	NOTICIAS	700	AM	0.29	1.62	4,461	0.22	1.41	3,505
GALAXIA STEREO (GYE)	TROPICAL	88.5	FM	0.27	1.56	4,285	0.25	1.55	3,857
ROMANCE	ROMANTICA	90.1	FM	0.26	1.49	4,080	0.23	1.46	3,637
ESTRELLA	TROPICAL	92.1	FM	0.26	1.46	4,007	0.31	1.96	4,873
MORENA FM (GYE)	TROPICAL	98.1	FM	0.25	1.43	3,933	0.23	1.46	3,623
MORENA AM (GYE)	NOTICIAS	640	AM	0.24	1.35	3,714	0.22	1.35	3,357
ONDA CERO (GYE)	POP/JUVENIL	96.1	FM	0.22	1.28	3,512	0.27	1.67	4,148
TROPICALIDA STEREO (GYE)	TROPICAL	91.3	FM	0.20	1.12	3,074	0.22	1.36	3,387
PUNTO ROJO	POP/JUVENIL	89.7	FM	0.19	1.06	2,909	0.16	1.00	2,489
CUPIDO	ROMANTICA	95.3	FM	0.18	1.00	2,733	0.13	0.83	2,057
ONCE Q	MUSICA EN	104.9	FM	0.17	0.96	2,636	0.14	0.89	2,206
SISTEMA DOS	NOTICIAS	1080	AM	0.16	0.92	2,520	0.21	1.33	3,297
CENTRO (GYE)	ROMANTICA	97.7	FM	0.14	0.82	2,246	0.13	0.84	2,091
ELITE	MUSICA EN	99.7	FM	0.13	0.74	2,020	0.12	0.75	1,870
FUEGO	ROMANTICA	106.5	FM	0.13	0.72	1,969	0.11	0.67	1,660
ATALAYA	NOTICIAS	680	AM	0.12	0.71	1,942	0.11	0.72	1,786
METRO STEREO (GYE)	POP/JUVENIL	95.7	FM	0.12	0.70	1,931	0.14	0.86	2,143

Source: 'Tendencias' Research Company, Oct 2012.

Ranking Quito

Total Audience

Total PP 18-99

RANKING DE EMISORAS QUITO				HOM-MUJ 12-99 TOTAL						RANKING DE EMISORAS QUITO				HOM-MUJ 18-99 TOTAL					
				LunesAViernes			SabadosYDomingos							LunesAViernes			SabadosYDomingos		
MEDIO	GENERO	DIAL	FRE	Rating	Share	Oyentes	Rating	Share	Oyentes	MEDIO	GENERO	DIAL	FRE	Rating	Share	Oyentes	Rating	Share	Oyentes
LA OTRA (UIO)	TROPICAL	91.3	FM	2.40	11.63	36,543	1.90	10.64	28,831	LA OTRA (UIO)	TROPICAL	91.3	FM	2.05	11.13	26,982	1.46	9.60	19,135
AMERICA (UIO)	TROPICAL	104.5	FM	1.95	9.46	29,734	1.72	9.65	26,147	CANELA (UIO)	TROPICAL	106.5	FM	1.78	9.64	23,366	1.28	8.41	16,762
CANELA (UIO)	TROPICAL	106.5	FM	1.78	8.60	27,015	1.51	8.46	22,911	AMERICA (UIO)	TROPICAL	104.5	FM	1.66	9.00	21,811	1.21	7.97	15,894
DISNEY (UIO)	POP/JUVENIL	90.5	FM	1.51	7.31	22,962	1.29	7.26	19,677	DISNEY (UIO)	POP/JUVENIL	90.5	FM	0.87	4.73	11,459	0.70	4.64	9,246
MAS CANDELA (UIO)	TROPICAL	107.7	FM	0.81	3.92	12,310	0.79	4.42	11,985	ECUASHYRI	ROMANTICA	104.9	FM	0.74	4.02	9,741	0.55	3.64	7,262
ARMONICA	ROMANTICA	96.9	FM	0.75	3.62	11,388	0.62	3.48	9,417	ZARACAY QUITO	TROPICAL	100.5	FM	0.62	3.35	8,120	0.55	3.65	7,267
GALAXIA STEREO (UIO)	TROPICAL	93.7	FM	0.65	3.13	9,847	0.60	3.39	9,187	ARMONICA	ROMANTICA	96.9	FM	0.61	3.32	8,057	0.50	3.26	6,509
ECUASHYRI	ROMANTICA	104.9	FM	0.63	3.05	9,589	0.49	2.77	7,503	GALAXIA STEREO (UIO)	TROPICAL	93.7	FM	0.54	2.95	7,146	0.46	3.06	6,105
ZARACAY QUITO	TROPICAL	100.5	FM	0.59	2.87	9,022	0.61	3.42	9,276	MAS CANDELA (UIO)	TROPICAL	107.7	FM	0.46	2.47	5,985	0.48	3.14	6,269
TROPICALIDA STEREO (UIO)	TROPICAL	90.1	FM	0.51	2.47	7,775	0.46	2.56	6,940	AÑORANZA LA RUMBERA	TROPICAL	99.7	FM	0.43	2.33	5,635	0.37	2.46	4,905
JOYA STEREO (UIO)	POP/JUVENIL	96.1	FM	0.49	2.35	7,391	0.37	2.07	5,393	TROPICALIDA STEREO (UIO)	TROPICAL	90.1	FM	0.42	2.29	5,399	0.35	2.33	4,843
MONUMENTAL	TROPICAL	1510	AM	0.45	2.17	6,812	0.41	2.30	6,241	ERES	ROMANTICA	93.3	FM	0.38	2.07	5,024	0.31	2.02	4,037
ONDA CERO (UIO)	POP/JUVENIL	103.3	FM	0.43	2.08	6,546	0.35	1.97	5,339	FRANCISCO STEREO (UIO)	TROPICAL	102.5	FM	0.38	2.07	5,021	0.32	2.12	4,229
J.C. RADIO (UIO)	POP/JUVENIL	107.3	FM	0.42	2.05	6,432	0.33	1.85	5,000	MONUMENTAL	TROPICAL	1510	AM	0.38	2.05	4,978	0.32	2.08	4,144
AÑORANZA LA RUMBERA	TROPICAL	99.7	FM	0.42	2.02	6,345	0.42	2.34	6,344	JOYA STEREO (UIO)	POP/JUVENIL	96.1	FM	0.35	1.92	4,643	0.27	1.77	3,536
ERES	ROMANTICA	93.3	FM	0.39	1.88	5,922	0.29	1.63	4,415	J.C. RADIO (UIO)	POP/JUVENIL	107.3	FM	0.32	1.75	4,233	0.28	1.84	3,673
FRANCISCO STEREO (UIO)	TROPICAL	102.5	FM	0.37	1.78	5,598	0.34	1.89	5,120	RUMBA (UIO)	DEPORTES	94.5	FM	0.32	1.75	4,231	0.37	2.43	4,850
LA DEPORTIVA	DEPORTES	99.3	FM	0.36	1.75	5,507	0.31	1.73	4,695	ONDA CERO (UIO)	POP/JUVENIL	103.3	FM	0.31	1.67	4,051	0.26	1.68	3,355
LA RED	DEPORTES	102.1	FM	0.35	1.69	5,299	0.35	1.96	5,322	LA GITANA	ROMANTICA	94.9	FM	0.30	1.63	3,958	0.22	1.47	2,922
METRO STEREO (UIO)	POP/JUVENIL	88.5	FM	0.35	1.68	5,275	0.31	1.72	4,661	LA RED	DEPORTES	102.1	FM	0.30	1.62	3,938	0.34	2.22	4,419
RUMBA (UIO)	DEPORTES	94.5	FM	0.31	1.50	4,721	0.32	1.78	4,812	METRO STEREO (UIO)	POP/JUVENIL	88.5	FM	0.30	1.61	3,892	0.24	1.60	3,198
GENIAL EXA FM	POP/JUVENIL	92.5	FM	0.29	1.40	4,415	0.25	1.38	3,727	LA DEPORTIVA	DEPORTES	99.3	FM	0.29	1.58	3,826	0.30	1.96	3,904
ALFA STEREO (UIO)	POP/JUVENIL	98.5	FM	0.28	1.35	4,230	0.23	1.28	3,466	GENIAL EXA FM	POP/JUVENIL	92.5	FM	0.27	1.47	3,556	0.22	1.42	2,838
TARQUI	NOTICIAS	990	AM	0.27	1.28	4,033	0.26	1.45	3,923	TARQUI	NOTICIAS	990	AM	0.27	1.45	3,513	0.23	1.48	2,957
LA GITANA	ROMANTICA	94.9	FM	0.25	1.23	3,862	0.20	1.10	2,967	SUCESOS	NOTICIAS	101.7	FM	0.26	1.43	3,475	0.24	1.61	3,214
RADIO MIX (UIO)	TROPICAL	105.3	FM	0.25	1.23	3,855	0.20	1.10	2,991	ALFA STEREO (UIO)	POP/JUVENIL	98.5	FM	0.24	1.28	3,100	0.21	1.37	2,726
SUCESOS	NOTICIAS	101.7	FM	0.23	1.12	3,524	0.19	1.04	2,824	LA PODEROSA	DEPORTES	92.9	FM	0.24	1.28	3,093	0.20	1.35	2,692
LA PODEROSA	DEPORTES	92.9	FM	0.21	1.01	3,165	0.17	0.93	2,532	RADIO MIX (UIO)	TROPICAL	105.3	FM	0.21	1.16	2,807	0.17	1.12	2,240
VISION (UIO)	NOTICIAS	91.7	FM	0.21	1.00	3,141	0.14	0.79	2,139	ONDA AZUL	ROMANTICA	101.3	FM	0.21	1.15	2,795	0.21	1.36	2,712
ONDA AZUL	ROMANTICA	101.3	FM	0.19	0.93	2,924	0.20	1.10	2,988	COLON FM (UIO)	ROMANTICA	98.9	FM	0.20	1.08	2,607	0.15	1.00	1,998



8 | Newspapers & Supplements

Newspapers

2nd Media in Investment.

- The main national newspapers are: Universo, Comercio, Extra, Expreso, Hoy, and Ultimas Noticias.
- Regional Newspapers: La Hora, El Mercurio (Azuay), El Diario (Manabi), El Correo (El Oro).
- Local Newspapers in Guayaquil y Quito: Albonoticias, MetroHoy, MetroQuil, El Quiteño, La Voz del Sur.
- In Ecuador, this is the principal media for some categories, such as: airlines, vehicles and real state companies.
- There are approximately 23 newspapers, and 18 of them are tracked by Infomedia Ecuador.

There are around 23 Newspapers in Ecuador



There are national, regional and local newspapers.

Newspapers Supplements

Newspapers Supplements help to segment the audience

- As they have become an excellent media, these publications have grown from 22 titles in 2011 to 62 in 2013.
- They are internal (but separate) sections within the newspapers, working as weekly magazines.
- They are ranked by IBOPE along with the mainstream magazines in couché paper.
- The titles with major readership circulate on Sunday along with major national newspapers: EL UNIVERSO and EL COMERCIO.
- Additionally there are specific themes, such as: Kids, Automotive, Economics and Teens.

There are 60 Newspapers Supplements approx.



The multiplicity of supplements allow to increase frequency of the message for advertising campaigns.



9 | Magazines

Magazines in Ecuador

A Media with High Segmentation

- The Magazines Market is in recovery of a recent saturation of titles that surpassed the demand.
- From 46 titles in 2011, there are only 30 in the present.
- There was a natural selection with the closure of publications that failed in the market.
- Grupo Vistazo made little steps broadening its portfolio with: AMERICA ECONOMIA, HOLA and THE ECONOMIST.
- The major readership levels are from: General Interest and Women's Magazines.

Around 30 Magazines are Tracked in Ecuador



Magazines Ranking



Source: Tendencias Research Company.



10 | Outdoor

Outdoor in Ecuador

A diverse Landscape

Among Quito and Guayaquil there are.:

- +11 Providers of Giant LED Screens.
- 5 Providers of Small Billboards
- 9 Providers of Bus Stops, and more than 257 stops.
- 1 Provider of Public Clocks with +80 venues.
- +20 Proveedores de Vallas de Gran Formato.
- The Big Billboards have a gross average cost of 18,000 USD in Guayaquil (10x4m) and 15,000 USD in Quito (8x4m all formats).
- There are restrictions against Alcohol Consumption (only bottle and brand can be showcased), and visual pollution. Then marketers compete for locations and have already used mobile billboards and other alternatives as well.

There are several formats



Creativity is a key factor to achieve awareness impact.

Outdoor Formats



Billboards



LED Screens

Outdoor Formats



Public Transportation



Mobile Billboards and Ad Trucks

Outdoor Formats



Countryside
Public
Transportation



Bus Station
Automatic
Doors



11 | Cinema

Movie Theaters in Ecuador

Market dominated by Supercines, Multicines and Cinemark

+220 cinema theaters in Ecuador

- Supercines and Cinemark are the main movie theater franchises in Ecuador. Capacity for each theater is around 140 people for each.

Supercines	151 theaters
Cinemark	32 theaters
Multicines	37 theaters
Imax	1 theater
Ochoymedio	3 theaters
Casa Cultura UIO	1 theater
Casa Cultura GYE	1 theater



Cinemas offer several formats besides of spots, being the 'static billboards' and 'brand activations' the most popular among all.

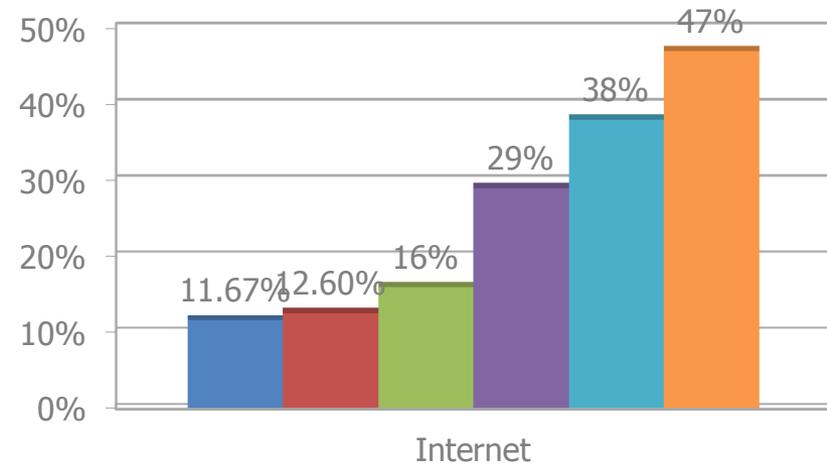


12 | Internet

Internet Penetration in Ecuador

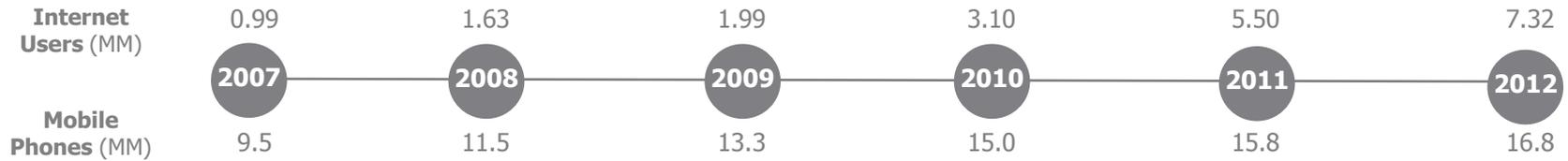
Internet

- There are more than 7,320,206 people with access to Internet in Ecuador.
- 2,364,105 people connect to Internet using a mobile device.

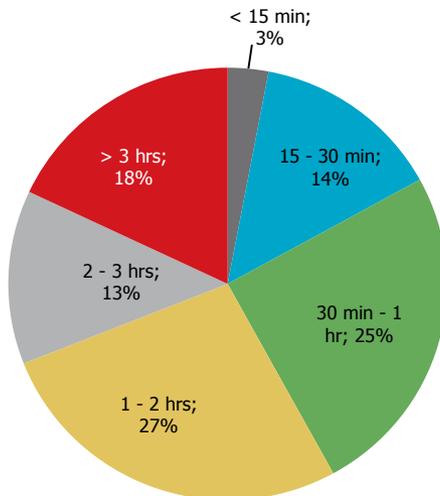


Source: Supertel, General Data OMD Digital.

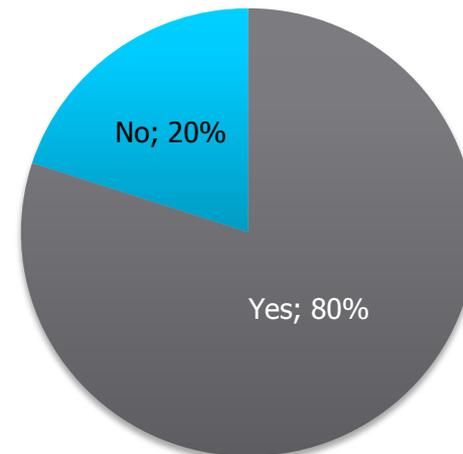
Internet Consumption & Mobile Phones



Time Consuming Online Content
(% of respondents)



Click on Online Ads to know more
(% of respondents)



Social Networks

Facebook and Twitter boosted the Internet Consumption in Ecuador

- +50% of users access to Social Networks.
- Youtube is the 2nd most visited Social Networks behind Facebook.
- Blogger remains in the Top 10 ranking and puts itself in 7th place before Twitter (9th).

Main Players

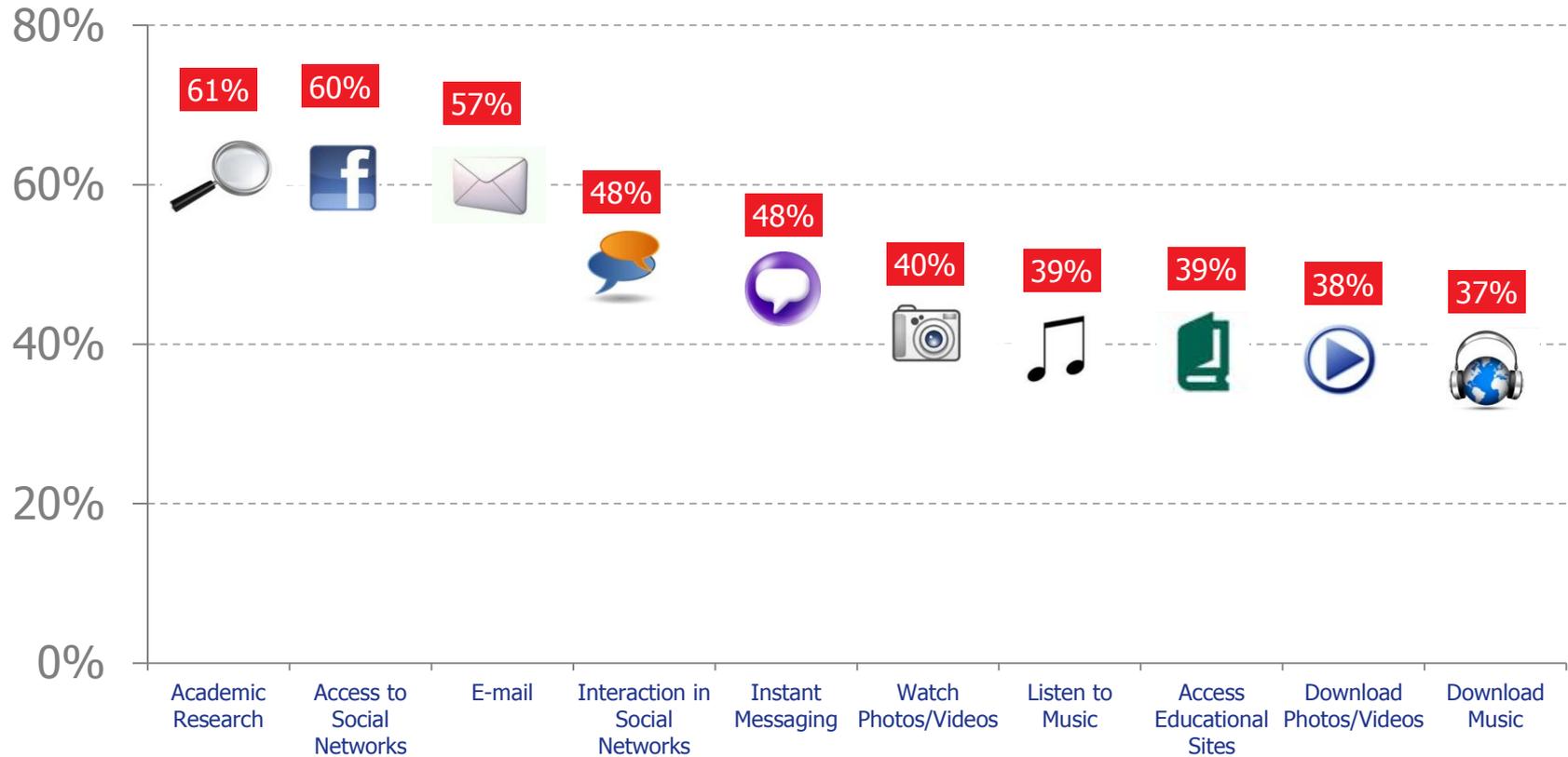


Source: General Data OMD Digital.

Websites Ranking in Ecuador

Top Sites in Ecuador 🇪🇨	
The top 500 sites in Ecuador. 📊	
1	<p>Facebook facebook.com A social utility that connects people, to keep up with friends, upload photos, share links and ... More ★★★★☆ Search Analytics ▶ Audience ▶</p>
2	<p>Google Ecuador google.com.ec Buscador que enfoca sus resultados para este país y a nivel internacional tanto en español como... More ★★★★★ Search Analytics ▶ Audience ▶</p>
3	<p>YouTube youtube.com YouTube is a way to get your videos to the people who matter to you. Upload, tag and share your... More ★★★★☆ Search Analytics ▶ Audience ▶</p>
4	<p>Windows Live live.com Search engine from Microsoft. ★★★★☆ Search Analytics ▶ Audience ▶</p>
5	<p>Google google.com Enables users to search the world's information, including webpages, images, and videos. Offers... More ★★★★☆ Search Analytics ▶ Audience ▶</p>
6	<p>Yahoo! yahoo.com A major internet portal and service provider offering search results, customizable content, cha... More ★★★★☆ Search Analytics ▶ Audience ▶</p>
7	<p>Blogger blogspot.com ★★★★☆ Search Analytics ▶ Audience ▶</p>
8	<p>WIKIPEDIA wikipedia.org The Free Encyclopedia A free encyclopedia built collaboratively using wiki software. (Creative Commons Attribution-Sh... More ★★★★☆ Search Analytics ▶ Audience ▶</p>
9	<p>twitter twitter.com Social networking and microblogging service utilising instant messaging, SMS or a web interface. ★★★★☆ Search Analytics ▶ Audience ▶</p>
10	<p>MSN msn.com Portal for shopping, news and money, e-mail, search, and chat. ★★★★☆ Search Analytics ▶ Audience ▶</p>

Top 10 Online Activities of Ecuadorians



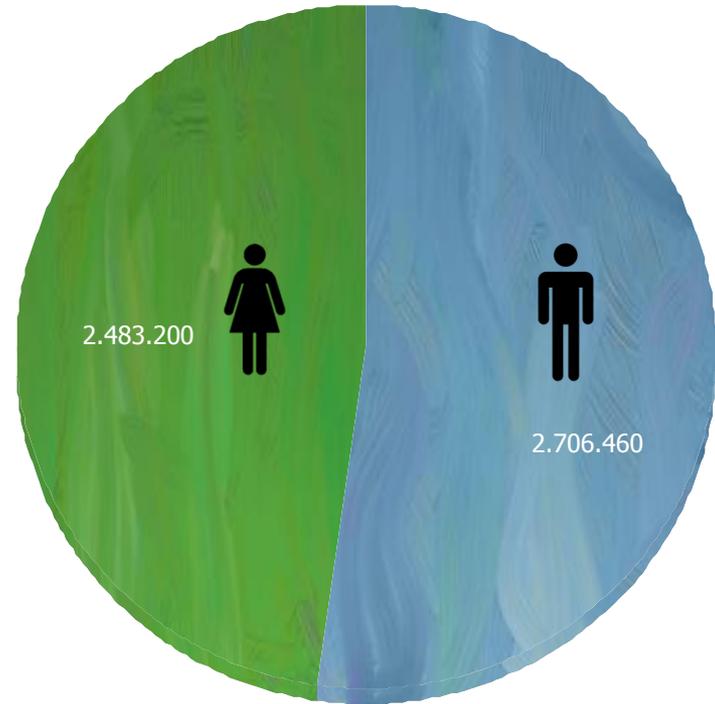
Note: Target PP 12+ABC. More frequent activities of internet users on last 30 days prior to survey.
 Source: TGI Ecuador 2012.

Facebook Users in Ecuador



Total: 5,199,180 people

Women: 48%
Men: 52%



■ Men ■ Women

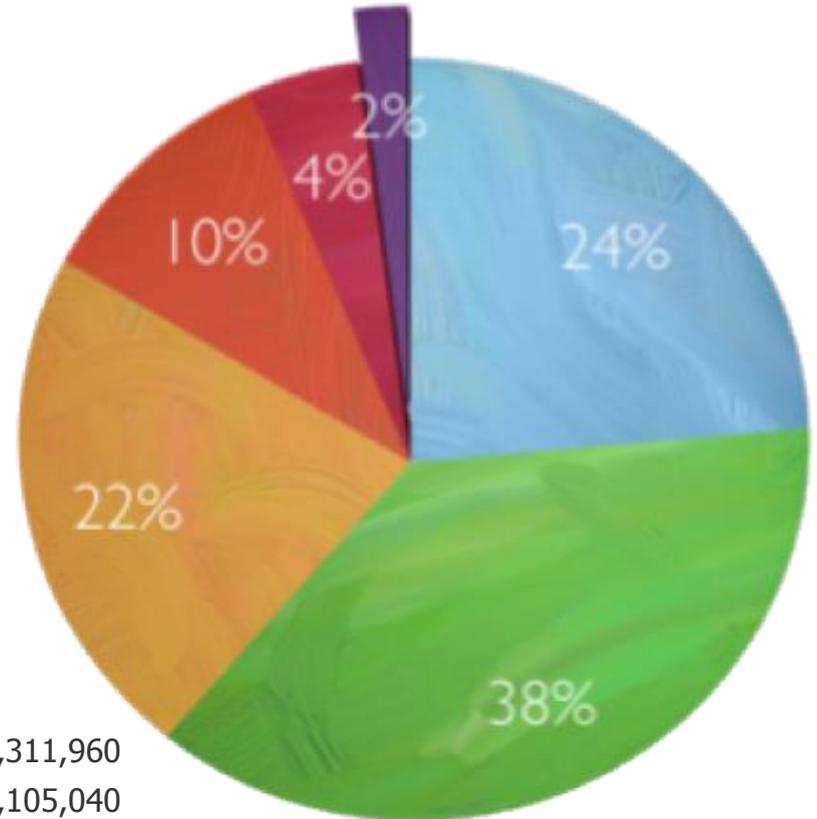
Source: OMD Digital Ecuador.

Facebook Users in Ecuador



Total: 5,199,180 people

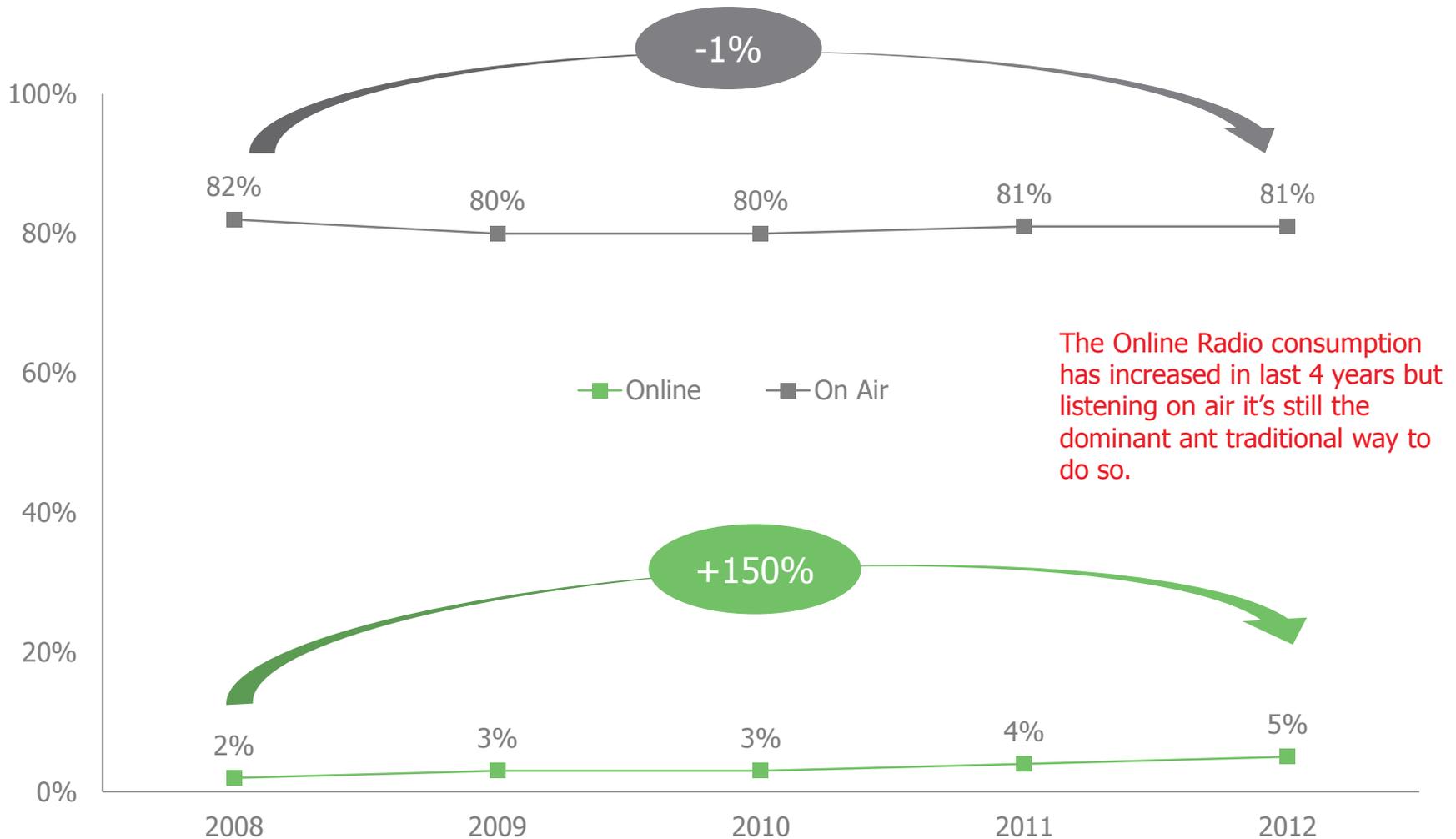
13-17 yo: 1,311,960
 18-24 yo: 2,105,040
 25-34 yo: 1,248,380
 35-44 yo: 563,260
 45-54 yo: 239,240
 55+ yo: 113,540



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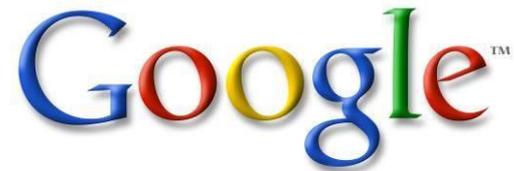
Source: OMD Digital Ecuador.

Online Radio Consumption



Note: Target PP 12+ ABC
 Source: TGI Ecuador 2012.

Main Providers in Ecuador

The Google logo, featuring the word 'Google' in its signature multi-colored font (blue, red, yellow, blue, green, red) with a trademark symbol.The i-network logo, featuring the text 'i-network' in a blue, lowercase, sans-serif font, with an orange circular icon containing a white stylized human figure to the right.The virtual ad logo, featuring the text 'virtual ad' in a yellow, lowercase, sans-serif font, with 'e-marketing specialists.' in a smaller, white, lowercase, sans-serif font below it, all on a blue background.The Facebook logo, featuring the word 'facebook' in a white, lowercase, sans-serif font on a solid blue rectangular background.

Thank You

Media Landscape 2013

