



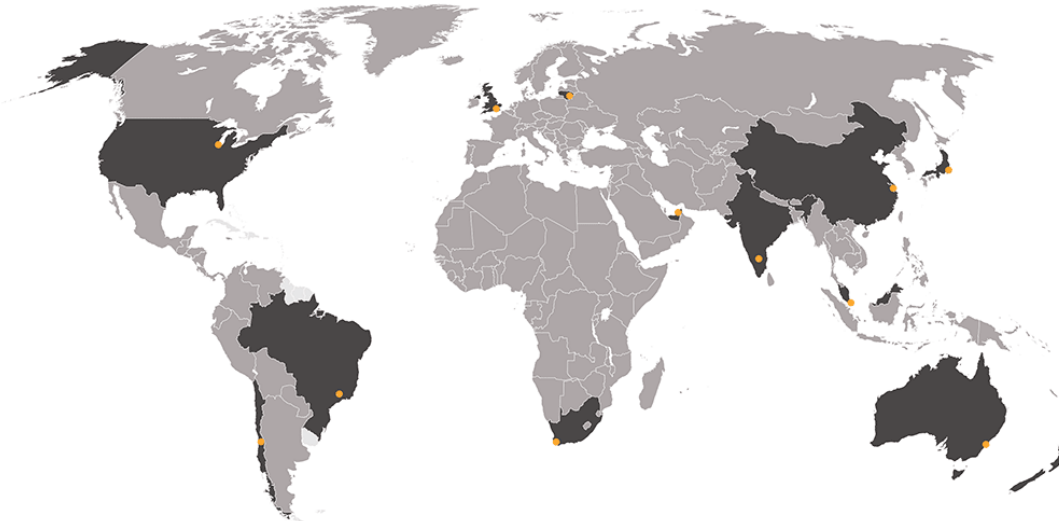
GLOBAL MARKET RESEARCH TOOLS FOR BUSINESS SOLUTIONS

12TH ANNUAL BMDA CONFERENCE "SUCCESSFUL 21ST CENTURY ORGANIZATION"

MAY 2014

Euromonitor International

- A global strategic market intelligence source for 40+ years
- Helping clients make informed strategic decisions
- Consumer-focused: **industries, countries, consumers**
- Annually-updated syndicated research in **80 countries**
- Customised ad-hoc projects conducted globally
- 1000 analysts in 80 countries
- Regional research hubs and industry specialist **support teams**



London



Chicago



Singapore



Shanghai



Dubai



Vilnius



Cape Town



Santiago



Tokyo



Sydney



Bangalore

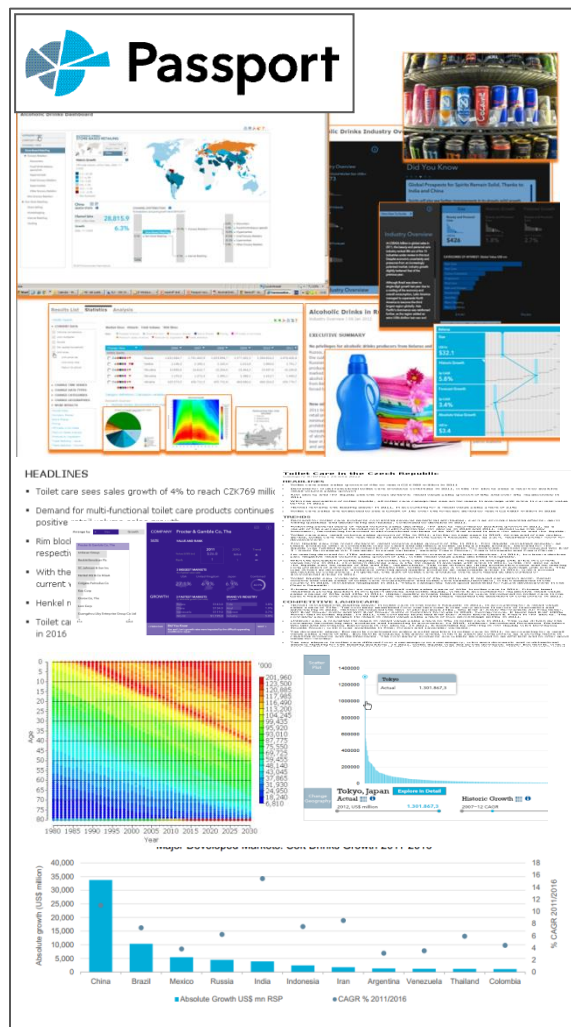


Sao Paulo



Research solutions

Syndicated solutions

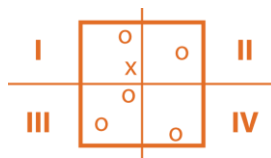


Custom research projects



Category evaluation

Sizes, shares, growth
Segmentation
Market entry strategy



Competitive intelligence

Profiling
Benchmarking
Partner evaluation



Innovation

NPD business case
Consumer insights
Product claims



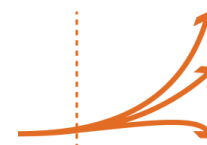
Route to market

Production, imports, exports
Supply and value chain
B2B and B2C channels



Macro

Opportunity frameworks
PEST
Quarterly tracking



Forecasting

Launch, sales, demand, lifecycle
Success / failure probabilities
Determine risk exposure



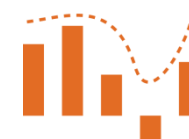
Scenario analysis

Market simulations
Portfolio analysis
Test business cases



Consumer analytics

Customer profiling
Income distribution models
Purchasing behaviour



Marketing analytics

Marketing effectiveness
Substitutes and complements
Price and channel strategy



Visualisation

Discovery, sharing, communication
Market attractiveness planners
Performance monitoring

INDUSTRIES

Market sizes, 1998-2018
Company and brand shares 2001-2012
Distribution, pricing data and more data sets

Monthly / quarterly analysis of key drivers influencing each industry

Strategic global profiles of key players by industry, evaluating position and prospects

Key facts and strategic direction of key local operators and subsides of global players.

Industry overview, analysing broad cross-category trends and operating environment.

Category level analysis with focus on current trends and future prospects.

Year round analysis of key industry "happenings" and important insights identified by our analysts.

Global Briefings

Global Profiles

Local Profiles

Market Insight

Sector Briefing

Statistics

Global Reports

Company Profiles

Country Reports

Comment

Country Pulse

COUNTRIES & CONSUMERS

Countries data, 1977-2030
Consumers data, 1990-2030

Strategy Briefings

Reveal major and emerging trends in consumer behaviour.

Technology, Communication & Media
Global Risk & Vulnerabilities
Income & Expenditure

Analysis of the TCM sector including home, public and mobile connectivity.

Analysis of the key factors affecting macro-economic stability.

Identify high income groups, spending patterns, and saving trends.
Highlights the advantages and disadvantages of doing business

Business Environment

Country Briefings

Country Profiles

Future Demographics

Analysis of current socio-political situation, economic performance and future outlook.

Consumer Lifestyles

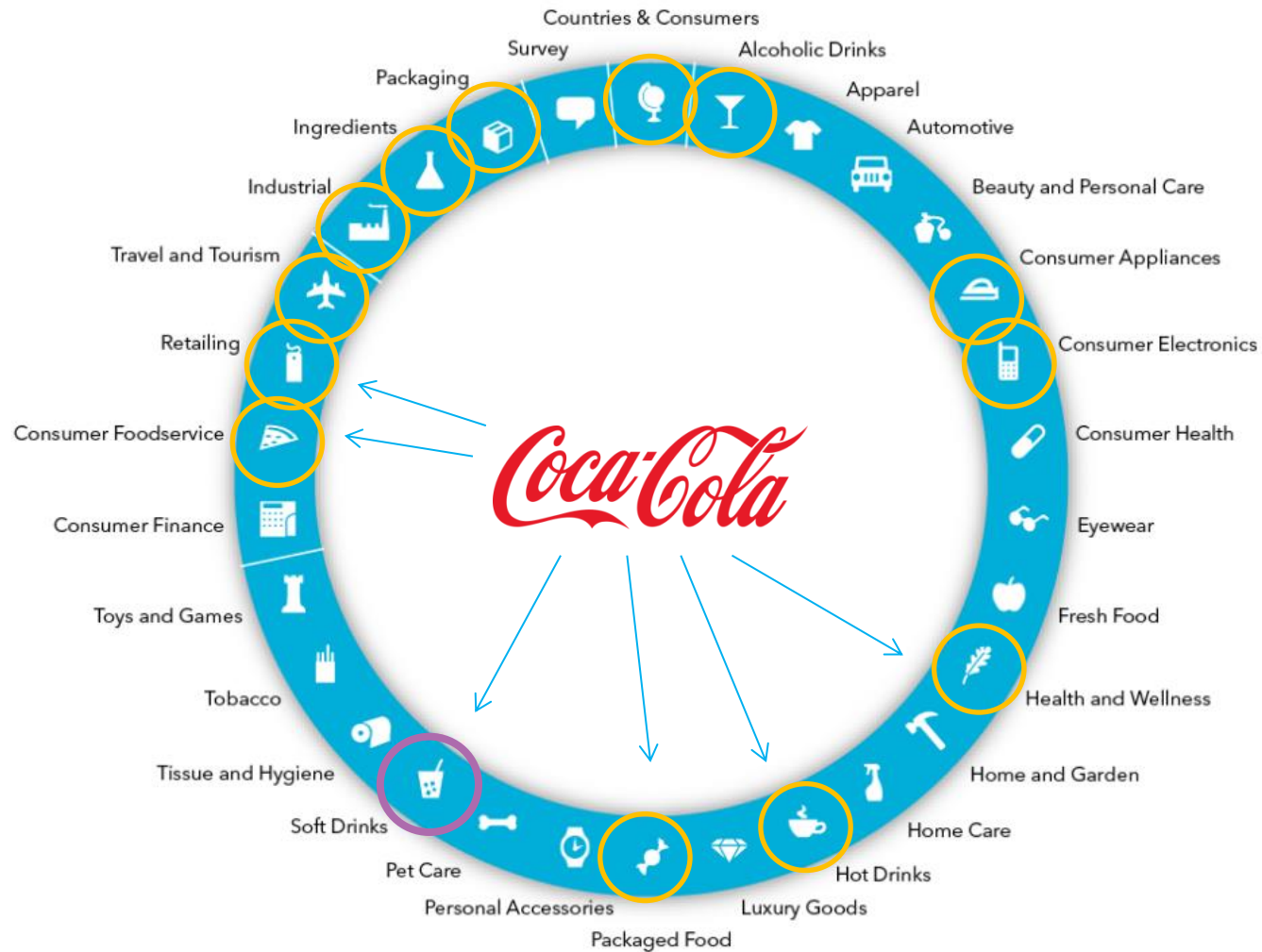
Identify consumer groups / population segments which will decline in importance, disappear or expand in the future.

Identify the factors influencing a nation's lifestyle choices and reveal who consumers are, what they do and where and how they do it.

Analysis of key socio-economic trends and trends shaping consumer attitudes, activities and spending habits.

Highlights country specific issues affecting local consumers

Analysis with cross – industry focus



CAMI: an overview

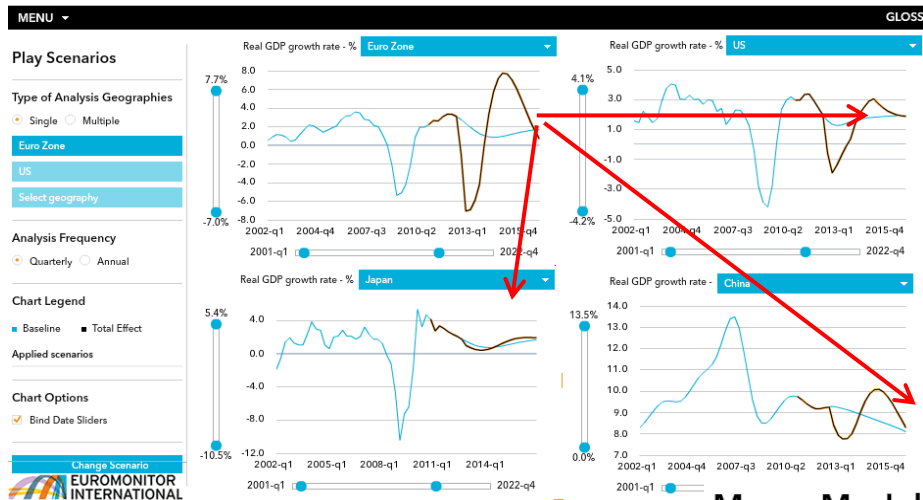
CAMI, is a modelling driven business intelligence centre, combining Euromonitor's extensive industry knowledge with innovative methods in statistics, economics, data science and data visualization.

- A cross industry resource developed by an in-house team of PhDs
- CAMI is unique amongst Euromonitor research offerings with an emphasis on the application of quantitative methods and scientific methods to data.
- CAMI will further client insight into the way they assess industry trends.



Macro-economic scenarios

Macro Model Dashboard



Play scenario:

Euro Zone recession returns – how this will affect GDP growth in the US, China and Japan?

Examine our baseline forecasts:

Euromonitor forecasts and probability ranges for unemployment, interest rate and inflation.

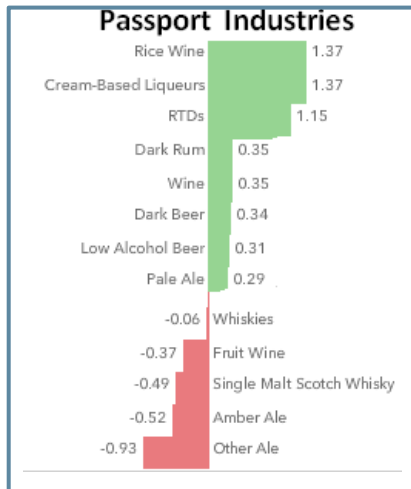
Macro Model Dashboard



How CAMI tools are related?

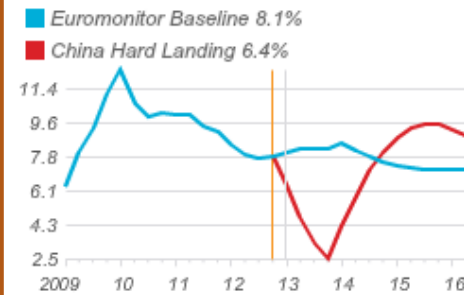
Effects of China hard landing

Sales of Alcoholic drinks in US is affected



© Euromonitor International

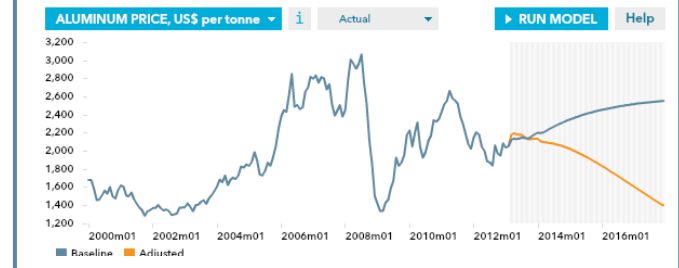
Macro Model



Aluminium price is down



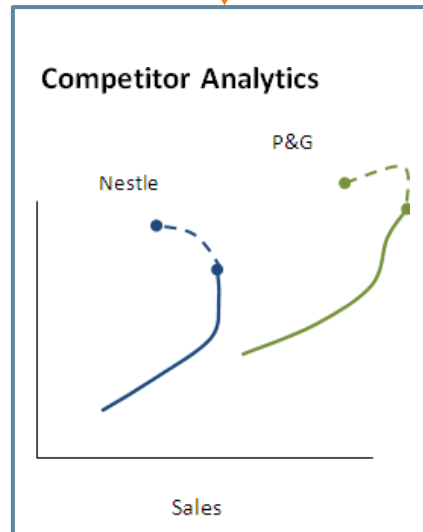
Commodity Price Model



Global sales of multinationals is slowing

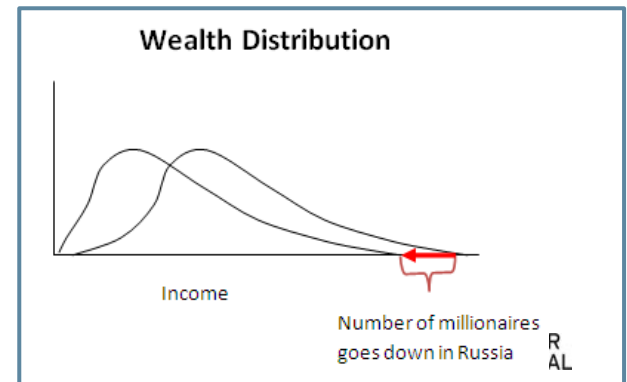


Competitor Analytics



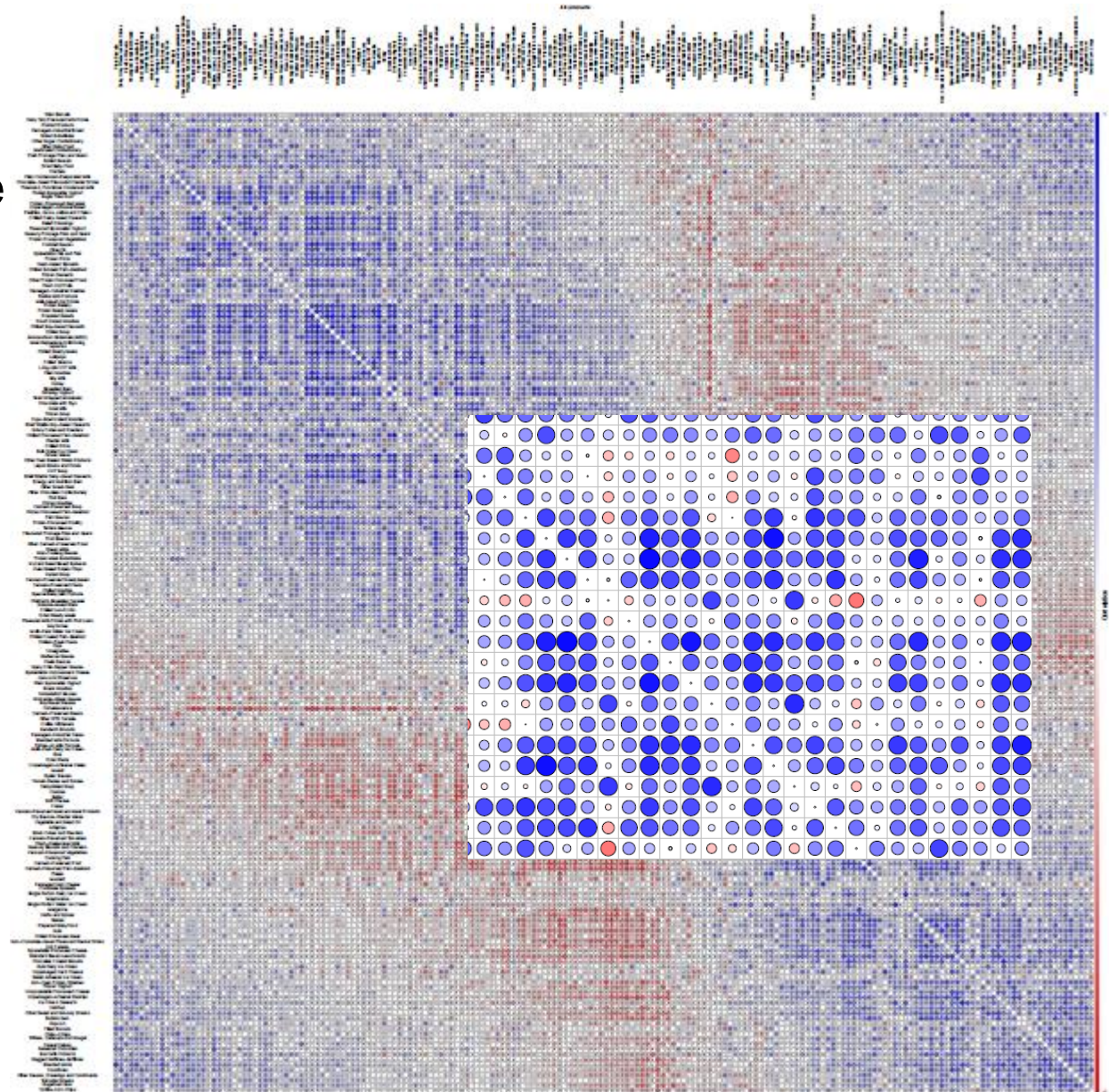
Number of rich Russians decreases

Wealth Distribution



CAMI will be strongly focused on data intensive visuals

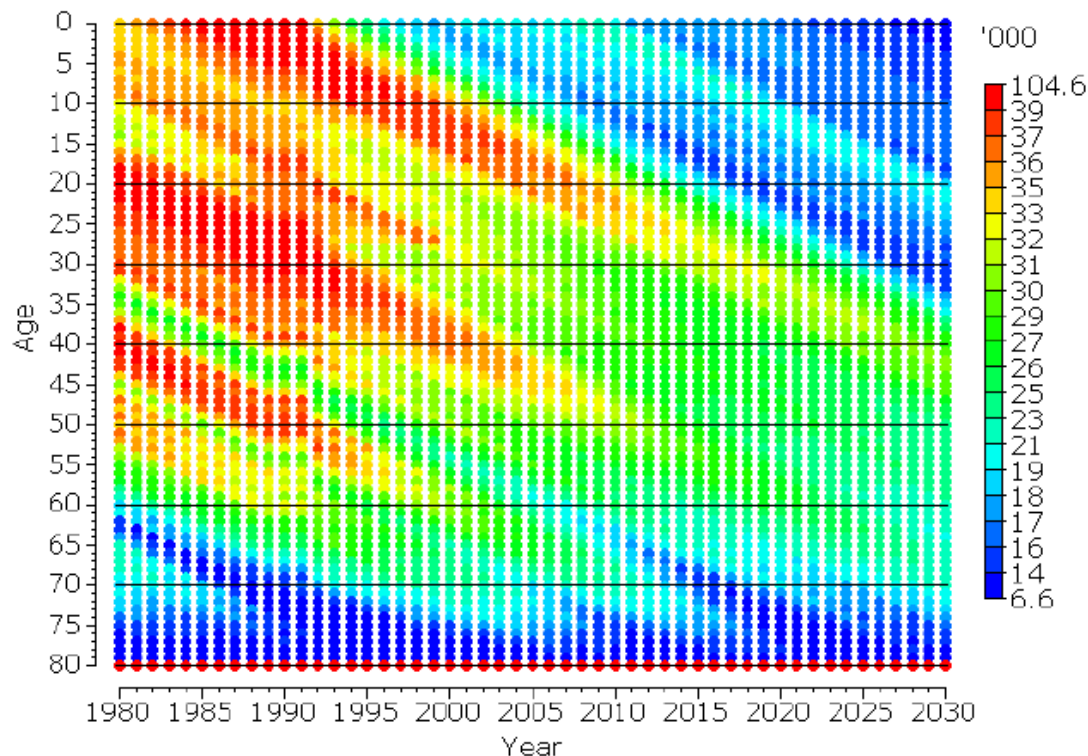
- Packaged Foods Inter-Correlation Matrix →
- Blue circles indicate positive correlation
- Red circles indicate negative correlation
- Small circles indicate absence of correlation



Latvia in 2030

Age Structure of the Population at a Glance: 1980-2030

(Each dot represents a single-year age group)

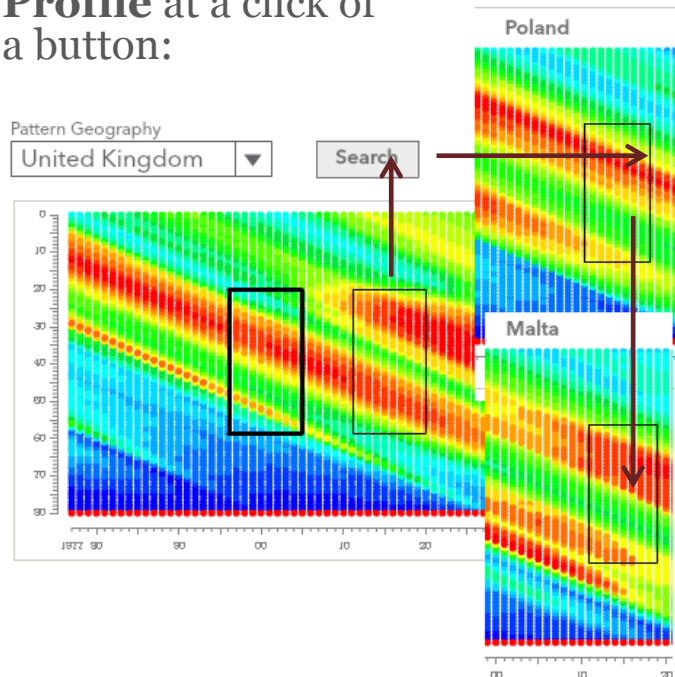


Source: Euromonitor International from national statistics/UN

Reading the chart: This "heat chart" depicts changes in the age structure of the population over time. Each dot represents the number of people in a specific (single year) age group in a given year. Accordingly, a dark red dot shows the largest concentration of people, by age, in a particular year while deep blue dots refer to the lowest concentrations. The areas of red therefore represent a large potential market in demographic terms.

Smaller applets and tools (in development)

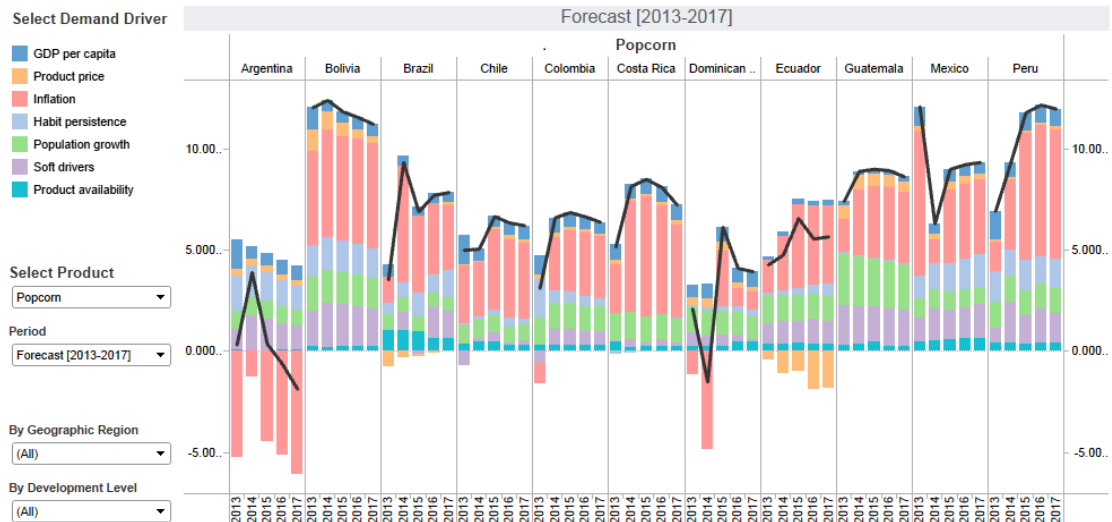
Match
**Demographic
Profile** at a click of
a button:



Industry Demand Models

Industry Demand Model

Growth Decomposition across Countries



Competitor analytics board

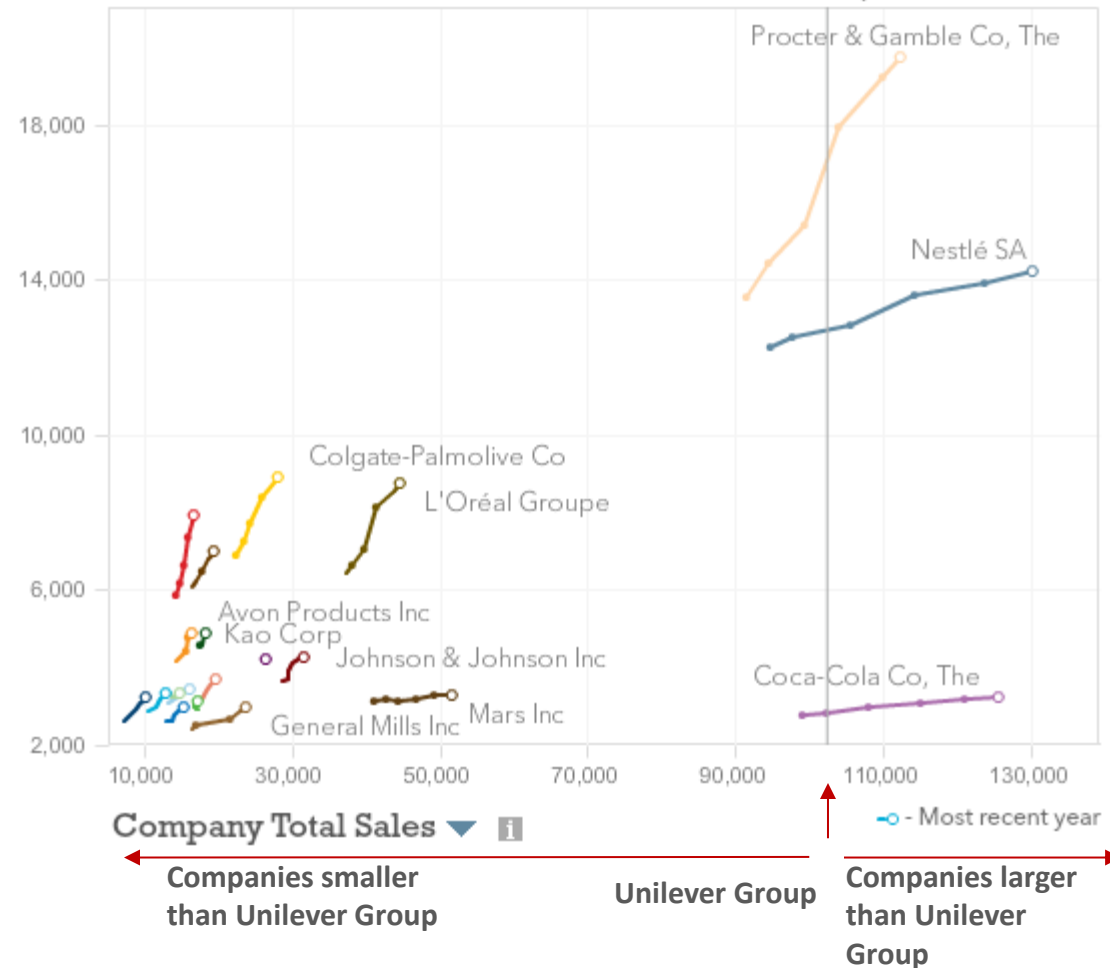
Competitor Analytics is the first tool to quantitatively map the competitive landscape and its dynamics.

Product range is becoming more similar to Unilever Group

Unilever Group and its Competition

Market overlap
US\$ mn

Unilever Group, 2013



Mapping global company footprint

Carlsberg A/S vs.

Heineken NV

- ☐ Overlap
☒ Carlsberg A/S
☐ Heineken NV

- SHOW: **i**
☐ Categories
☒ Countries
☐ Markets

- AREA SHOWS: **i**
☒ Actuals
☐ Growth / Decline

100% **i**

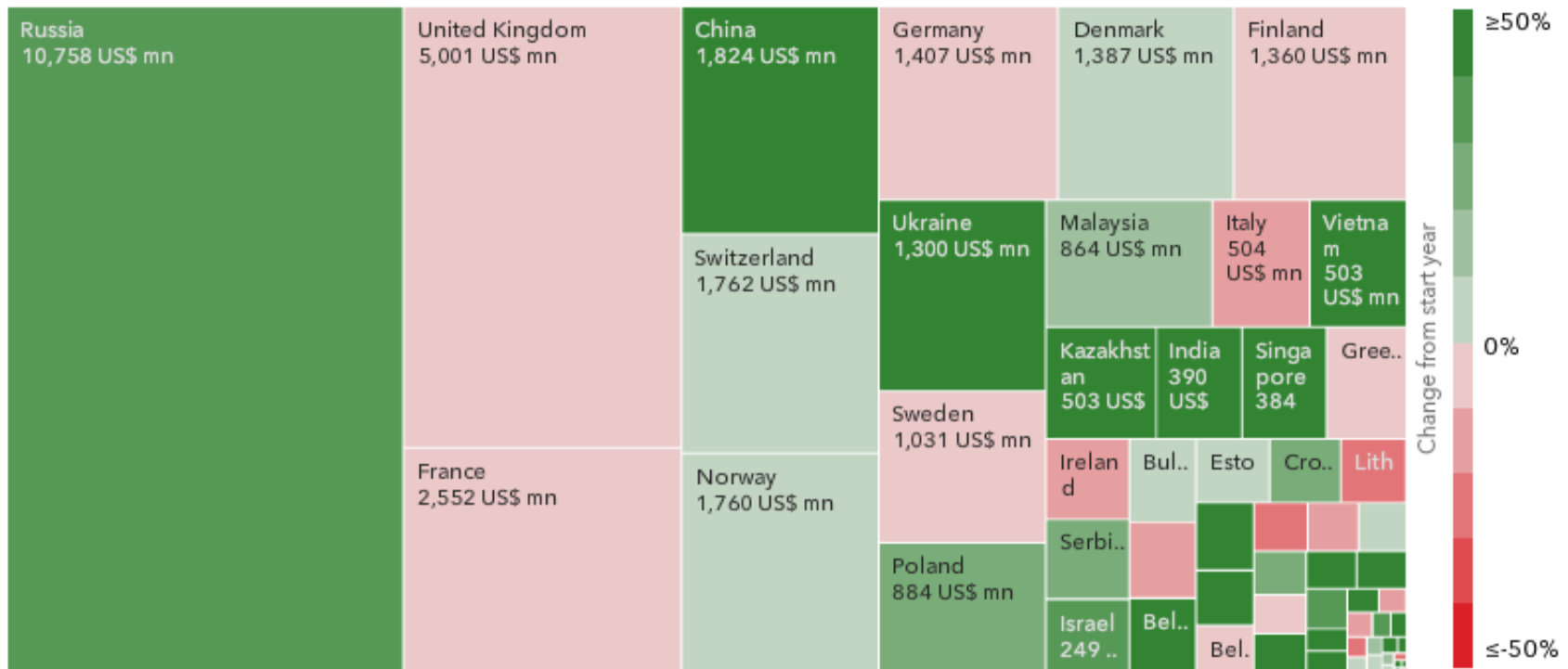
Heineken NV



Carlsberg A/S

Sales 2013: 37,977 US\$ mn (37,977 displayed)

☐ Nest treemap



Forecasts listed by consensus economics

- CAMI builds the bridge between macro and micro economics
- CAMI explains and illustrates cross-industry relationships
- CAMI combines a vast number of demographic/industry datasets
- **And, we are already an internationally recognized economic forecaster!**



CRUDE OIL

Survey Date Spot Price (Feb. 18): US\$117.4	Brent Crude Oil				
	Mar '13	Jun '13	Sep '13	Dec '13	% change from spot
Barclays Capital	119.00	130.00	126.00	125.00	6.5%
HWI	118.00	122.00	125.00	125.00	6.5%
GKI Research	117.00	117.00	120.00	120.00	2.2%
ANZ	114.50	118.50	119.50	119.00	1.4%
Scotiabank	117.00	117.00	115.00	118.00	0.5%
Euromonitor International	111.10	116.70	117.20	117.20	-0.2%
BNP Paribas	115.00	114.00	114.00	115.00	-2.0%
CIMB Group	110.00	115.00	120.00	115.00	-2.0%
Credit Suisse	110.00	115.00	120.00	115.00	-2.0%
Deutsche Bank	108.00	112.00	115.00	115.00	-2.0%
Deloitte Access Economics	113.37	112.29	113.49	113.97	-2.9%
China Int'l Capital Corp	112.00	105.00	113.00	113.00	-3.7%
Societe Generale	109.70	104.70	113.00	112.30	-4.3%
BoA Merrill Lynch	108.00	110.00	110.00	112.00	-4.6%
Commonwealth Bank	116.00	117.00	114.00	110.00	-6.3%
Macquarie Bank	105.00	103.00	107.00	110.00	-6.3%
Center for Global Energy Str	115.69	115.18	112.89	108.06	-8.0%
CIBC	115.00	107.00	107.00	105.00	-10.6%
Econ Intelligence Unit	110.50	99.00	103.50	105.00	-10.6%
Investec	105.00	105.00	105.00	105.00	-10.6%
Standard Bank	109.00	106.00	104.00	105.00	-10.6%

Business Awards

Euromonitor Awarded the Queen's Award for Enterprise: International Trade



We are pleased to announce we have been awarded the Queen's Award for Enterprise, the UK's most prestigious business award. Euromonitor received The Queen's Award for Enterprise: International Trade due to its substantial international sales growth of 155% over the past 6 years.

"This success is attributed to our high quality research from our 1,000 analysts around the globe, strong relationships with existing customers and committed staff in our 12 offices," said Euromonitor Founder Robert Senior.

The Queen's Awards provide an opportunity to celebrate outstanding business throughout the United Kingdom. The awards are made annually by Her Majesty Queen Elizabeth, and are only given for the highest levels of business excellence.

"In 2013, we expanded our sales into 106 countries worldwide, opened our twelfth office in Brazil, and won the HSBC/PWC's Private Business of the Year Award," said Senior. "I am tremendously proud of our employees and their efforts in making the company such a success."

Euromonitor has won the Private Business Award 2013.



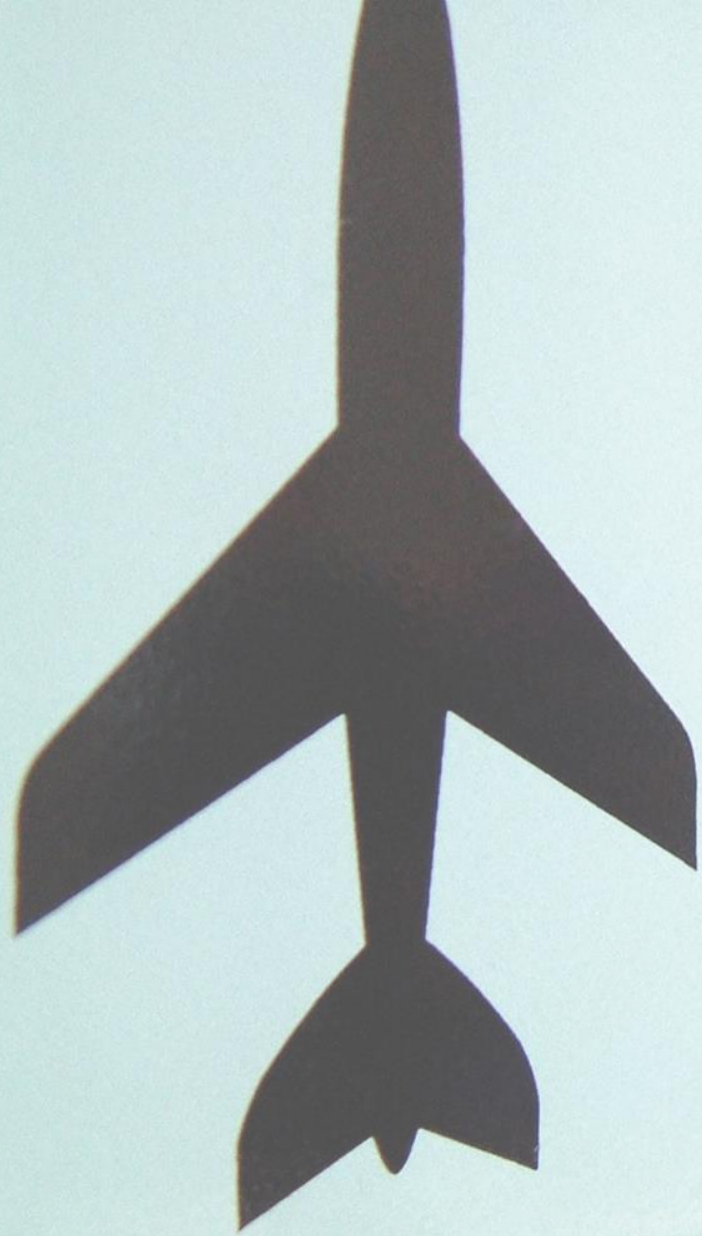
At the awards ceremony at London's Guildhall, Robert Senior and Trevor Fenwick received the main award of the evening; **The Private Business of the Year**.

The awards ceremony was opened by a speech from the UK Chancellor of the Exchequer, George Osborne, who praised the endeavour and contribution of private business to the UK economy.

The award is sponsored by PWC and HSBC, is open only to privately owned businesses, who demonstrate a progressive track record, inspirational management drive, international success, long-term strategy and progressive sustainability policies.

The award has been won previously by other British global businesses such as Dyson and JCB.

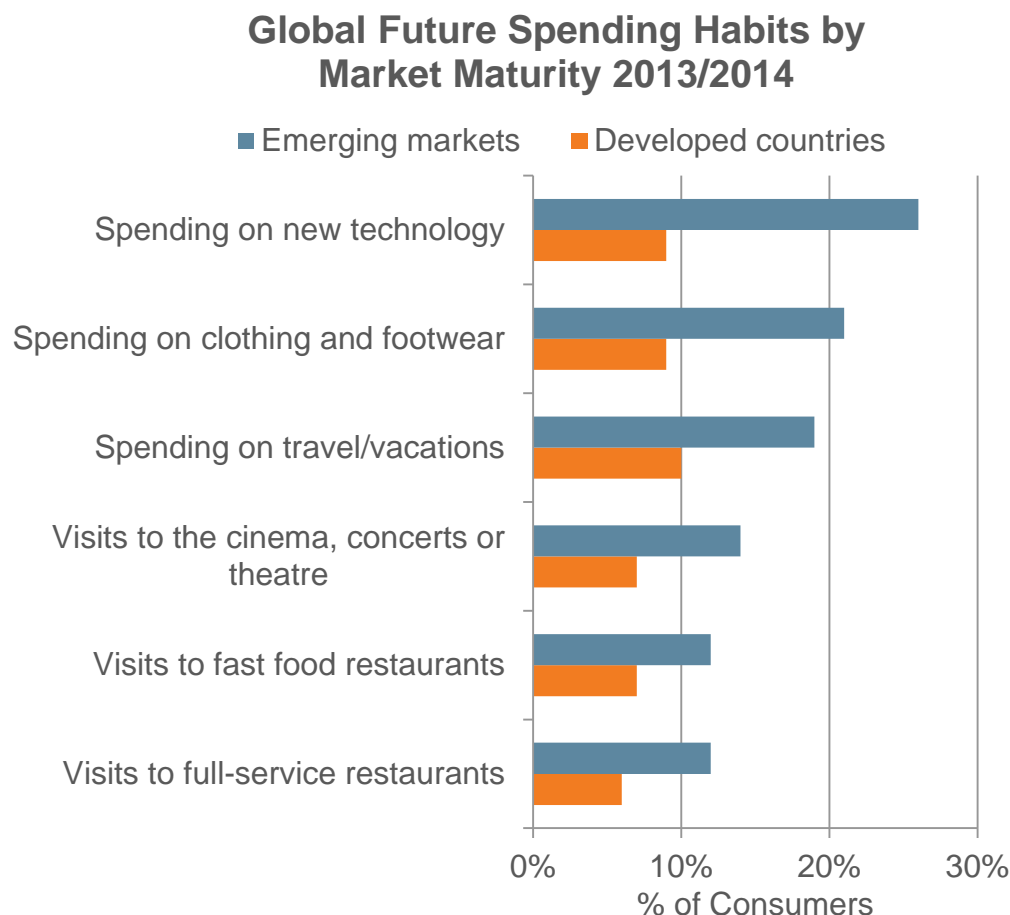
This award is testimony to our strength innovation and export success as a company and to the hard work and excellence shown by all of our staff.



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CASE STUDIES: TRAVEL & TOURISM

Spending on travel is a top three priority



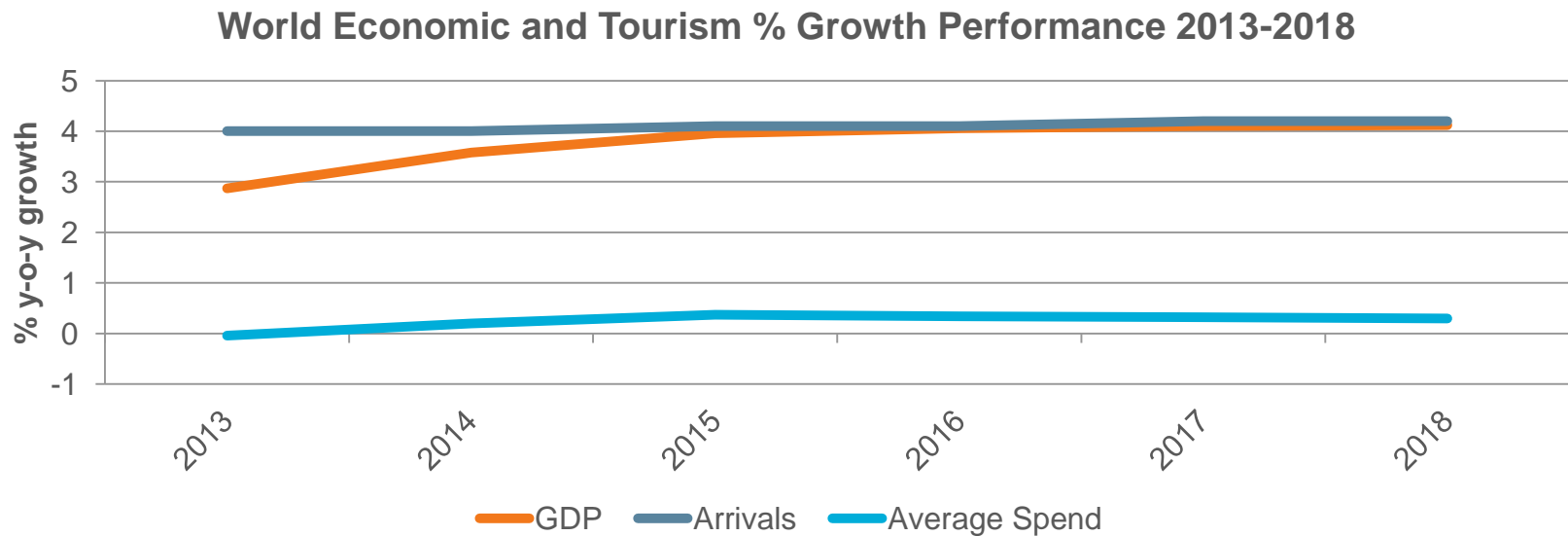
- Emerging market consumers more likely to say that they had increased spending over the past year
- Emerging markets more likely to increase their spending over the next year in technology and travel

Source: Euromonitor International Global Consumer Trends, 2013

Note: Shows percentage of consumers in each market who said they intend to increase spending for the given categories in the next 12 months (mid-2013 to mid-2014)

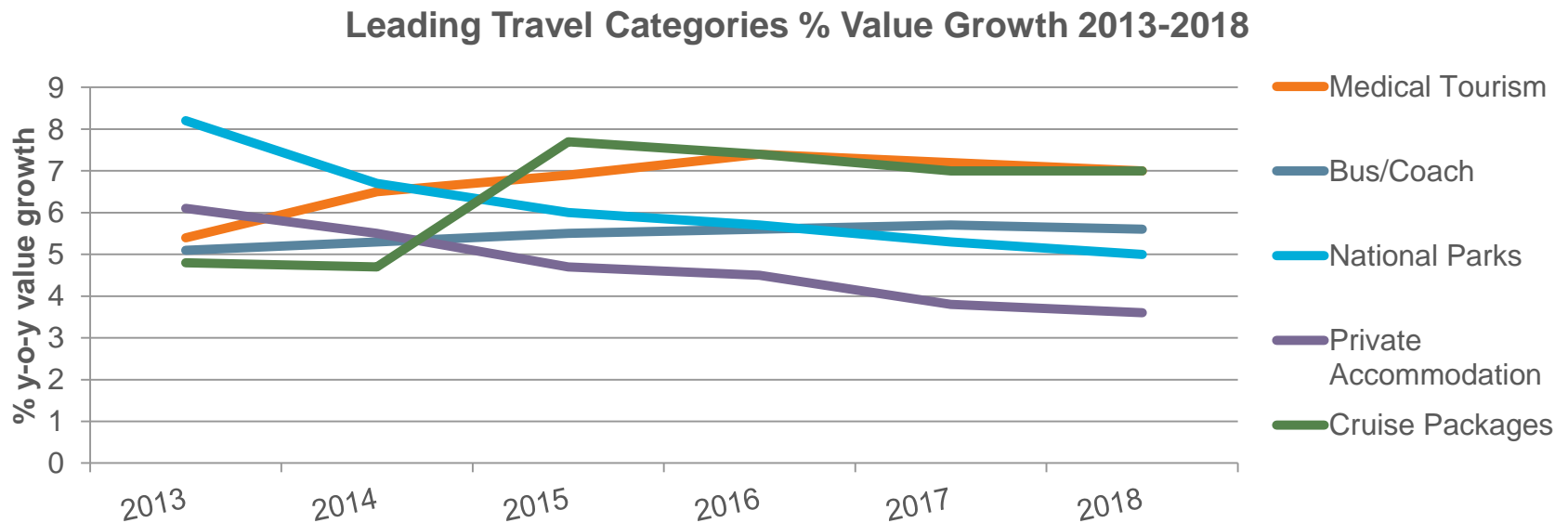
Global tourism demand hits record levels

- Increases in arrivals proved stronger than the growth in global GDP for 2013
- Average spend by arrivals continues to show minimal growth to 2018
- Consumers heading online to find deals and value for money when spending on travel



Desire for health and relaxation behind dynamic growth

- Medical tourism is a leading growth category
- Cruise packages boost from new emerging markets visitors
- Natural parks popular as consumers seek nature-based activities
- Private accommodation benefits from the peer-to-peer trend



CASE STUDIES: CITIES

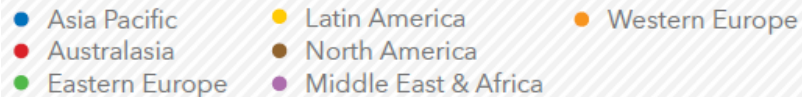


Top City Destinations Ranking

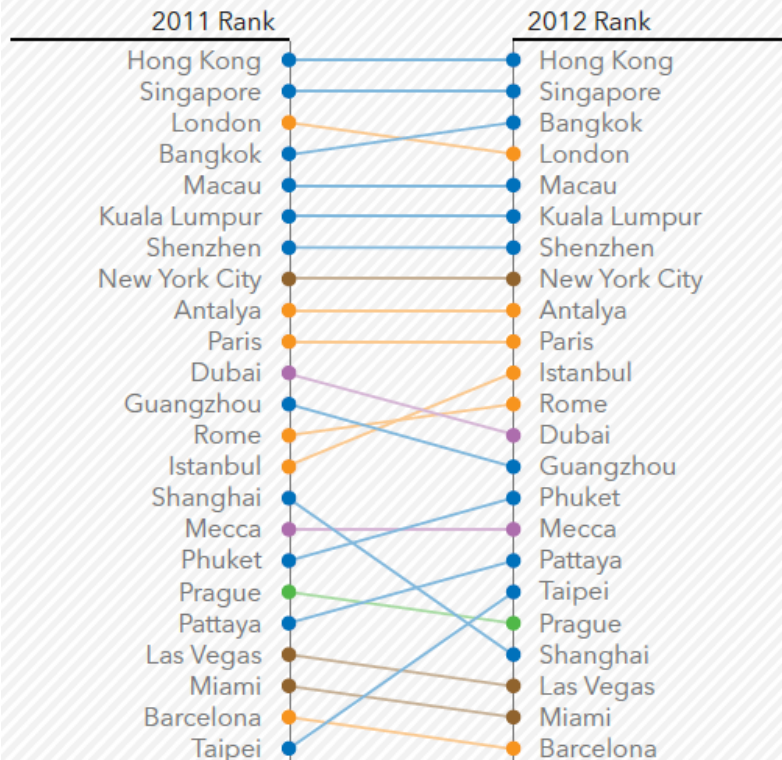
- Top 100 cities together experiencing a healthy 7% growth in international arrivals

Top 100 Cities in 2011 and 2012

Change in Rank



** New because of expanded research



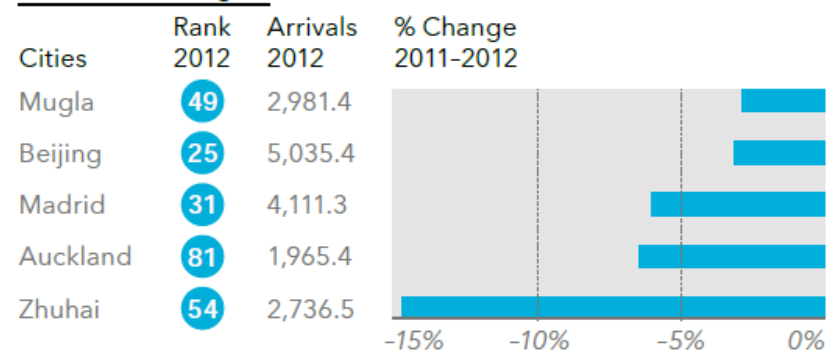
Best and Worst Performing Cities

arrivals '000 trips, 2012; % change 2011-2012

Best Performing



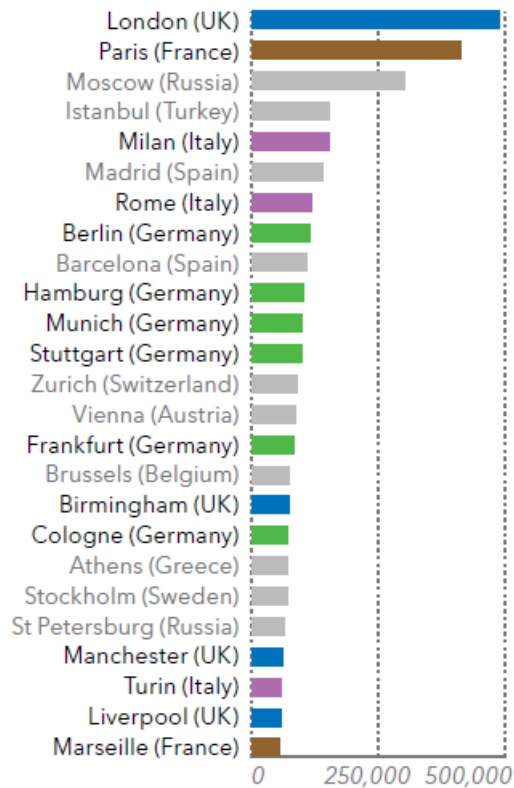
Worst Performing



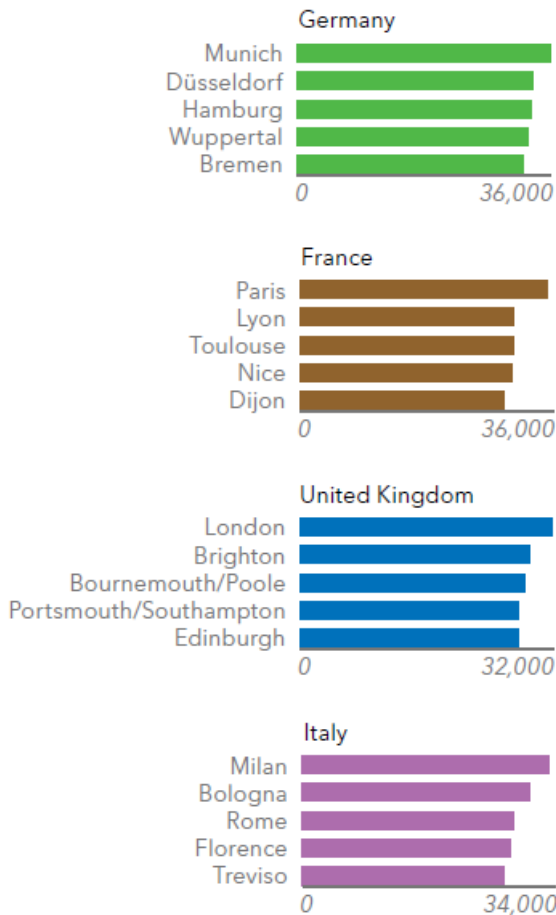
Are Second-Tier Cities Visible in Europe?

- Non-capital cities are expected to play an important role in achieving balanced territorial development at the EU level

Top 25 European Cities
Total Disposable Income
US\$ million, 2013

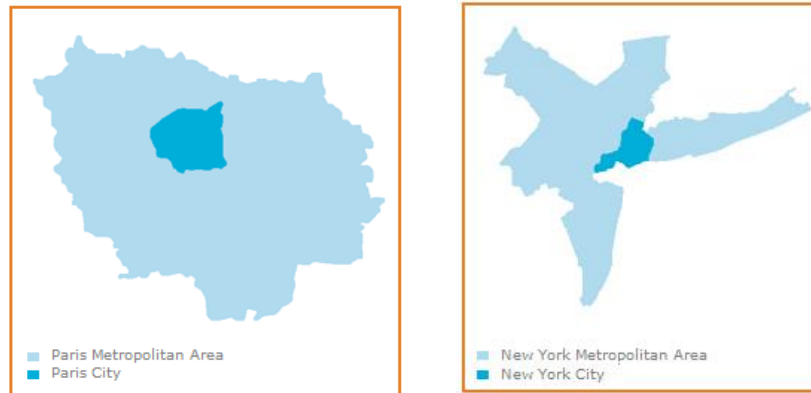


Wealthiest Cities by Country
Per Capita Income
US\$, 2013



Definitions and data sources

Passport Cities provides the data for **metropolitan areas** (different than core cities!), because they can be considered as single labour and consumer pool and can be used as a proxy to estimate market potential.



Data sources

- regional statistical offices
- city development agencies
- central and regional governments
- central banks
- national and regional transport departments
- tourism departments
- airports
- public transport providers
- vehicles registers, municipalities
- air pollution measuring stations
- NGOs
- hotels associations
- NSOs
- international organisations

126 City reviews for each of Tier 1 cities

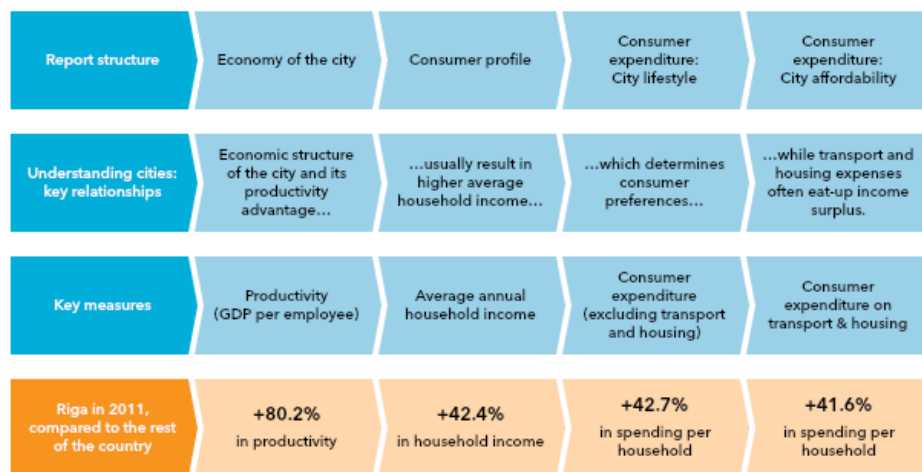
Riga City Review

Cities | 05 Feb 2013

Riga Review At A Glance

Understanding Riga Review Structure

Chart 1 Overview



Source: Euromonitor International

Key Facts On Riga

Summary 1 Key Facts On Riga 2006, 2011, 2020

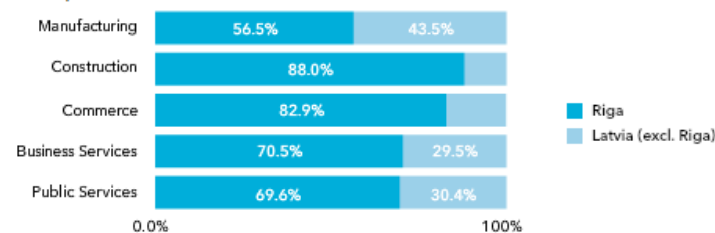
Indicator	2006	2011	2020
Share of Services (% of total GDP)	68.9	68.6	-
Total GDP (LVL million, current prices)	7,642	9,497	18,794
Real GDP Growth (%)	10.8	6.2	3.8
Unemployment Rate (%)	5.5	15.9	-
Population: January 1st ('000)	1,097	1,090	1,084

Source: Euromonitor International

Industrial Make-up

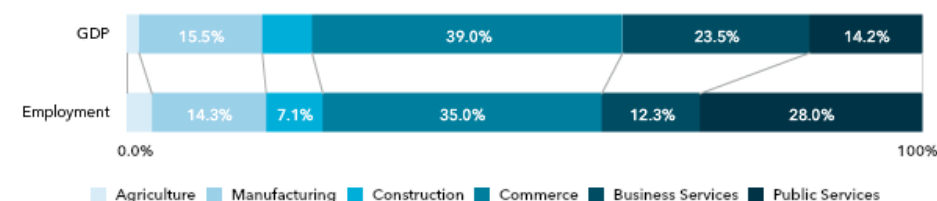
Chart 3 GDP By Economic Sector 2011

As % of country total



Source: Euromonitor International

Chart 4 Industrial Composition Of Riga 2011



Source: Euromonitor International

Riga is the largest Latvian city and undoubtedly the core centre of the country's economy. More than half of the national population (53%) resides in Riga, contributing 67% of the country's GDP.

Almost two thirds of the economy in the metropolitan area is based on commerce and business services. As in most Eastern European metropolitan regions, commerce contributes the largest share of the regional GDP (39%). Commerce in Riga is also supported by the activities of its seaport: in 2011, exports accounted for 42% of Latvian GDP and most of them were transferred through the Port of Riga.

Business services account for almost a quarter (24%) of metropolitan GDP, a relatively small share for a capital city. Manufacturing creates 16% of the regional economy; in contrast to the trend in many Western European cities, it is up from 12% in 2006.

Webinar: Uncovering Business Opportunities in Second-Tier Cities

<http://go.euromonitor.com/webinar-uncovering-business-opportunities-second-tier-cities.html>



Uncovering Business Opportunities in Second-Tier Cities

Thursday, May 15, 2014
9 a.m. CST/3 p.m. BST

Capitalise on rising middle classes, government incentive programs and competitive production costs to grow your business

International companies often target the largest metropolises when establishing themselves in external markets. However, doing business in these first-tier cities can prevent growth due to intense competition and diverse populations.

Second-tier cities can provide unexploited opportunities for generating extra revenue. In fact, many smaller cities are growing more quickly than first-tier cities, both in production and consumption.

In this webinar, you will learn:

- Which second-tier cities hold the most opportunities for your business
- Consumer trends developing in first-tier cities vs. second-tier cities
- How wealth is distributed



Yes, I want to attend!

First Name: *

Last Name: *

Email Address: *

Job Title: *

Company Name: *

Company Type: * Select... ▼

Country: * Select... ▼

Phone Number: *

Register



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