EUROMONITOR INTERNATIONAL

PASSPORT GMID

GLOBALŪS STRATEGINIAI TYRIMAI

NATALJA STRELKOVA IR ROBERTAS LAPUSINSKIS, EUROMONITOR INTERNATIONAL

21.10.2011

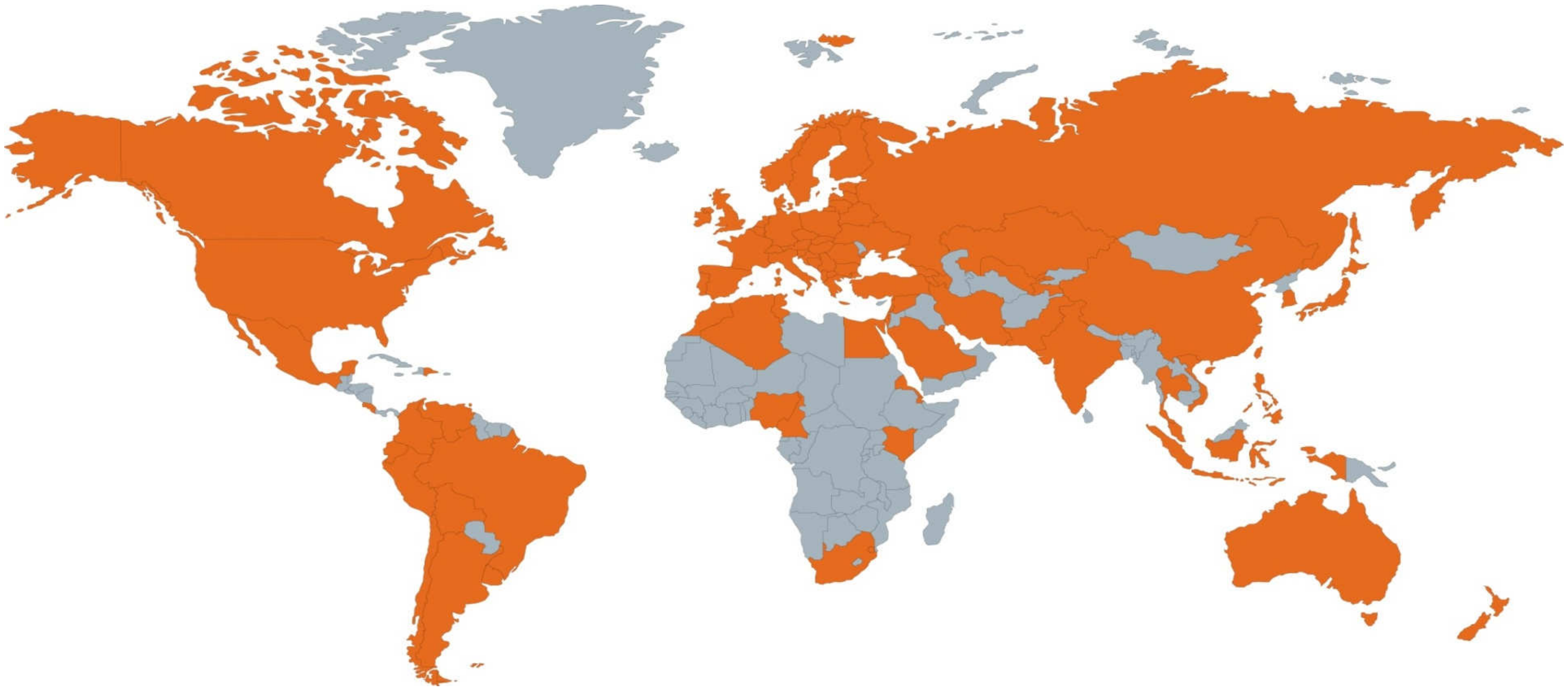
EUROMONITOR INTERNATIONAL

- Globalūs tyrimai
- 40 metų patirtis dirbant su viešuoju sektoriumi

- Tyrimų objektai: industrijos, šalys, vartotojai
- Knygos, ataskaitos, sindikuota duomenų bazė, ad-hoc projektai

- 800 analitikų 80-yje šalių
- Regioniniai tyrimų koordinavimo centrai

GEOGRAFINĖ APIMTIS



80 šalių
85% pasaulio gyventojų
98% globalių vartotojų išlaidų

PASSPORT GMID STRUKTŪRA

Consumer Products

- Alcoholic Drinks
- Beauty & Personal Care
- Clothing & Footwear
- Consumer Appliances
- Consumer Electronics
- Consumer Health
- DIY & Gardening
- Eyewear
- Fresh Food
- Health & Wellness
- Home Care
- Hot Drinks
- Housewares
- Luxury Goods
- Packaged Food
- Pet Care
- Personal Goods
- Soft Drinks
- Tissue & Hygiene
- Tobacco
- Toys & Games

Services

- Consumer Finance
- Consumer Foodservice
- Retailing
- Travel & Tourism

Suppliers

- Industrial
- Ingredients
- Packaging

Countries and Consumers

- Countries and Consumers
- Consumer Trends & Lifestyles
- Economy, Finance & Trade
- Government, Labour & Education
- Income & Expenditure
- Industry, Infrastructure & Environment
- Population & Homes
- Technology, Communications & Media

DUOMENŲ FORMATAI

Statistics

Market Sizes | Historic | Number of Trips | '000 trips

Key: Related Analysis | Chart this Row | Analysis by country

Change View		2005	2006
United Kingdom			
	Arrivals from Australia	910,6	94
	Arrivals from Austria	271,3	28
	Arrivals from Belgium	670,1	61
	Arrivals from Canada	790,8	86
	Arrivals from Denmark	507,0	49
	Arrivals from France	2.826,0	3.13
	Arrivals from Germany	3.024,9	3.14
	Arrivals from Ireland	2.782,2	2.79
	Arrivals from Italy	1.159,2	1.42
	Arrivals from Japan	321,8	33

Company Profiles

Category and Geographic Opportunities | Travel & Tourism: Accor Group | © Euromonitor International

Accor Invests Heavily in Asia Pacific

- With over 400 hotels in Asia Pacific, or the equivalent of 10% of its global portfolio, Accor has allocated 37% of its pipeline development to the region to gain increased penetration, mostly in China and India.
- Despite the growing hotel supply throughout the region, meaning strong competition and low margins in the short term, Accor is confident once travel and tourism activity picks up in 2012, hotels that have managed to achieve strong penetration will enjoy profitable returns.
- Aside from investing in economy brands like Ibis and All Seasons, Accor has plans to extend its Pullman network in Asia Pacific to 100 by 2015. Such decision seems contradictory as business travel demand continues to decline. Nevertheless, the new style 5-star hotel capitalises on an emerging niche of business travellers that are switching traditional luxury accommodation for more functional but stylish hotels.

Ibis to dominate openings in Asia Pacific

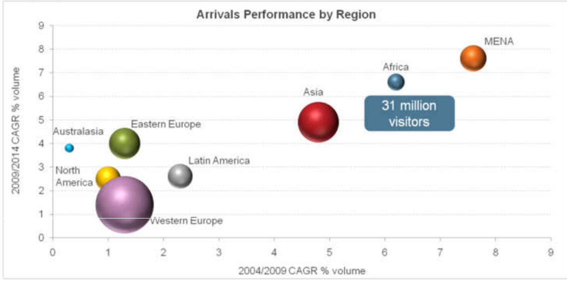
- Since its launch in 2004, Ibis, the budget brand, has achieved notable expansion in China and, in the upcoming years, it will be no different.
- As of 2010, the brand has 38 hotels or 7,224 rooms in the country.
- In an attempt to further support growth of its Ibis brand in China, Accor introduced the franchising model in 2010. Previously, Accor used an ownership and lease model for Ibis in China.
- Accor expects to open 9,500 rooms by the end of 2010, and plans to have 17,500 rooms in 2013/2014.
- Ibis is set to account for around 34% of new outlet openings in Asia Pacific.
- In 2009, Ibis announced plans to open its largest hotel in Asia Pacific by 2012 – a 550-room hotel located in downtown Hong Kong.

Global Briefings

Tourism Overview | Travel and Tourism: Africa | © Euromonitor International

Africa vs Global Tourism Performance

- Although numbers of visitors are smaller than for most other regions, Africa's growth between 2004 and 2009 was outpaced only by the Middle East and North Africa region.
- Growth of 9.3% is expected for 2010, and visitor numbers are expected to reach 39 million by 2014.
- South Africa, Madagascar, Kenya and Zambia are all predicted to show growth of over 10% in 2010.
- Of the world's Top 50 tourism destinations according to the number of arrivals, as defined by UNTWO, only South Africa (25th) makes it onto the list.



City Briefings

Inbound Tourism | Travel & Tourism: Lisbon | © Euromonitor International

Inbound Arrivals by Source Country

Crisis leads to tourism decline

- According to the National Statistics Institute (INE) and Turismo de Lisboa, the various types of accommodation throughout Lisbon city registered an estimated total of 1.9 million international arrivals in 2009, representing a decrease of 4.3% over the previous year.
- A sharp decline in major inbound markets as a direct result of the global economic crisis was the major reason behind the negative performance over the year.
- In Europe, the number of tourists coming to the city from the UK dropped by 21%, while Italy and Germany also experienced significant declines of 13% and 7%, respectively.
- On the other hand Spanish and French visitor numbers grew by 3.5% and 2%, respectively, but not enough to offset the losses by their European counterparts.
- Declines by other major markets outside Europe included Brazil and Japan, which fell by 15% and 5%, respectively, while US visitor numbers grew by 3.3%.
- Over the forecast period arrivals to Lisbon hotel establishments are forecast to grow by almost 15% as a result of gaining back international demand with the recovery of its major feeder markets and the popularity of Lisbon as an affordable, culture-laden city break destination.

International Hotel Establishment Arrivals to Lisbon City by Country 2009/2014

'000 people	2009	2014	% growth
Spain	353.8	407.3	15.1
France	171.0	183.3	9.3
Germany	159.7	182.0	14.0
Italy	140.1	158.9	13.4
UK	121.2	134.7	11.1
Brazil	156.1	195.7	25.4
US	125.5	133.5	6.5
Canada	23.0	24.9	8.3
Japan	29.3	33.0	12.6
Other	600.6	711.0	18.4
TOTAL	1,881.3	2,172.9	15.5

Source: INE/Turismo de Lisboa/Euromonitor International estimates

Country Reports

- Despite the global economic downturn and the Chinese government's financial stimulus to boost domestic tourism, outbound departures still increased by 3% in 2009, to reach 35 million. During the forecast period, outbound departures are expected to increase by a 7% CAGR, to 49 million visitors.
- China is touted as the next big economy, and the country was not badly affected by the economic downturn in 2009. Outbound expenditure injected a much-needed RMB268 billion into the economies of destination countries in 2009. As the global economy recovers and consumer confidence is regained, outbound tourist expenditure is expected to enjoy a 6% CAGR to reach RMB353 billion at the end of the forecast period.
- Hong Kong and Macau will remain China's favourite destinations going into the forecast period. However, as Chinese tourists become more adventurous, the Philippines will enjoy an extraordinary 29% volume CAGR. The lower cost of living in the Philippines and diversified tourist attractions, ranging from diving spots to historical sites, will attract 547,000 visitors by 2014. More affluent Chinese tourists will want to travel beyond East Asia, and countries such as the US and Australia will enjoy strong volume CAGRs of 10% and 9% respectively in the forecast period.
- The rise of Chinese tourists has not gone unnoticed by NTOs in many countries. As traditional high spenders from the US and Europe cut down on long haul travel, Chinese tourists have been identified as replacements. Countries such as Thailand, Singapore, Malaysia and Australia are busy trying to attract Chinese tourists by setting up tourism offices in China, offering the Chinese language on their tourism websites. Chinese and regional low cost carriers will also drive outbound tourism.

CATEGORY DATA

Table 10 Departures by Destination: 2004-2009

'000 people

	2004	2005	2006	2007	2008	2009
Australia	251.3	285.0	308.5	357.5	356.4	342.1
Austria	205.0	223.0	256.4	282.2	273.3	238.5
Cambodia	102.6	123.5	130.5	140.6	147.6	153.2
France	437.8	601.0	673.9	716.7	379.8	330.2
Germany	210.9	234.9	251.7	271.6	252.5	230.5
Hong Kong, China	7,788.4	8,026.5	8,440.2	9,090.2	9,380.0	9,411.3
India	34.1	44.9	62.3	88.1	53.3	41.0

PASSPORT GMID PASAULYJE

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PRIVATUS SEKTORIUS

Johnson & Johnson Inc.
Pfizer
L'ORÉAL
Heinz
ABN·AMRO
Boots
JPMorgan
MARS incorporated
Henkel
A Brand like a Friend
P&G
i'm lovin' it
Cadbury Schweppes
Nestlé
AVON
the company for women
ESTĒE LAUDER
HERBALIFE.
DANONE
gsk GlaxoSmithKline
Fonterra
CREDIT SUISSE | FIRST BOSTON
Kimberly-Clark
Merrill Lynch
oriflame
Google
Ford Motor Company
BRITISH LIBRARY
Firmenich
REXAM
Carrefour
ALCATEL
bp
METRO Group
The Spirit of Commerce
THE BODY SHOP
ELOPAK
Tetra Pak

METODOLOGIJA

What it *makes*

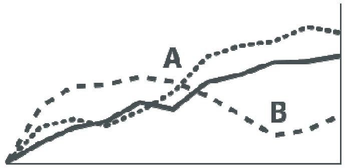
Uniquely detailed, cross comparable, global data built with robust methodology, audited by clients

What it *means*

Trustworthy, independent and transparent source to analyse commercial opportunities and threats

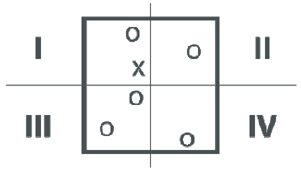
„AD-HOC“ PROJEKTŲ RŪŠYS

Prekių kategorijos analizė



Šalių ir prekių ženklų analizė
Produktų įvedimo į rinką vertinimas
Šalies patrauklumo įvertinimas
Pradinė galimybių analizė
Strateginės prezentacijos

Žinios apie konkurentų veiklą

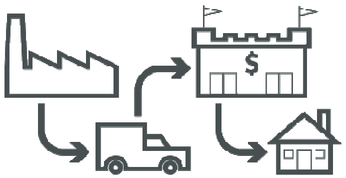


Konkurentų analizė ir charakteristikos
Prekių kategorijų ir konkurentų įvertinimas, jų veiksmų stebėjimas
Įmonių ir ūkio šakų palyginamoji analizė
Ūkio šakos stebėjimas

Makro tendencijų analizė

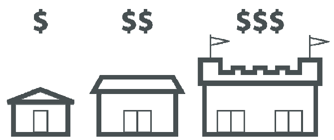
Vartotojų apklausos
Mega tendencijų analizė
Ekspertų nuomonių įvertinimas
Tendencijų kitimo įvertinimas

Tiekimo ir vertės grandinės analizė



Pakuotės ir prekės sudėties analizė
Atliekamų funkcijų analizė
Platintojų ir didmenininkų charakteristikos
Vertės grandinės analizė
Vartotojų nuomonės tyrimai

Pardavimo taškų analizė



Mažmeninės prekybos kainų analizė
Mažmeninės prekybos taškų išsidėstymas
Mažmeninės prekybos tinklo išvystymas
Mažmeninės prekybos įmonių firminių prekių ženklų nagrinėjimas

EUROMONITOR INTERNATIONAL

THANK YOU!

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