Passport GMID
Award winning business database for libraries

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International Sales Executive
Presentation outline

- Euromonitor International
  Making sense of global markets

- Passport GMID
  Award-winning business database for libraries

- Industries, countries, consumers
  A complete intelligence service

- Our research approach
  Depth, consistency, insight

- Questions & Answers
Euromonitor International

- A trusted global intelligence source
- Helping clients make informed decisions
- Research focus: industries, countries, consumers
- Subscription services, books and custom research
- 600 analysts in 80 countries
- Regional research hubs and industry specialist client support teams
Overview of Passport GMID

What is it?

- Gateway to a vast research resource
- Global perspective, internationally comparable data
- Same high value research used by business

What is it for?

- A complete picture of the commercial environment
- Monitor markets, operating conditions, consumer trends
- Ideal for all types of research project work

What’s in it?

- Industries
- Countries
- Consumers

- Statistics, reports, comment
- 4,000 products and services
- 115 million data points
- 15,000 full text reports: global, regional, country, company
- 205 countries
Industries

Market performance trends and drivers

Observe

- Consumer markets
- Service markets
- Industrial markets

Apply

- Review market trends
- Benchmark company performance
- Evaluate distribution channels
- Identify future outlook

“....the premier source of international marketing data”
Professor of Marketing, Graduate School of Management in Australia

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Countries

Factors influencing the business environment

Observe
- Economic indicators
- Energy and environment
- Population trends
- Production and trade

Apply
- Track economic situations and outlook
- Monitor changing demographics
- Assess a country’s attractiveness for investment

“With students and staff from all over the world, we find the international coverage of the GMID database invaluable”
Judge Business School Library, University of Cambridge
Consumers

Consumer attitudes, opinions and behaviour

Observe

- Household profiles
- Income distribution
- Lifestyle analysis
- Social trends

Apply

- Profile your customers
- Understand cultural differences
- Define new consumer segments
- Spot emerging trends

“One of our highest used databases. We wouldn’t want to be without GMID”

IMD, Switzerland
Create research projects relevant to the corporate world

- Corporate strategy planning
- Country profiling
- Channel and customer management
- Product and brand management
- Consumer insights
- Competition strategies
Supports teaching and research across disciplines

- International business & marketing
- Economics
- Social sciences
- Humanities
- Geography
- Travel and tourism
- International hospitality management
- Food marketing
- International relations
- Environmental health

“GMID is a very heavily used product, not just by the business school”  
Business Electronic Services Librarian, Colombia University Library
Our research approach

Consistent methodology for all countries

Comparable definitions and coverage

Multiple sourcing for accuracy, perspective and insight

Rigorous data validation and cross country checks

In-depth research in each country: published data, opinion, analysis

Benefits from close client relationships

Concurrent international level research

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Methodology

Countries & Consumers

Sources
- National Statistics
- Central Banks
- Government Ministries
- International Organizations
  - IMF
  - OECD
  - World Bank
  - Eurostat
  - ILO
  - UNCTAD
  - COMTRADE
  - UNESCO

Industries

Sources
- Store Checks
- Production/Trade Statistics
- Trade Associations
- Trade Press
- Company Reports
- Broker Reports
- Trade Surveys
  - Suppliers
  - Brand owners
  - Distributors
  - Retailers
  - Industry

Quality Control

Research
- Harmonise
- Definitions
- Coverage

Analyse

Cross Check

Validate

Estimate

Model

Forecast

Client

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

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Why Passport GMID?

- Must have resource for universities and business schools
  - 6 million page views annually
  - 98% clients renew their subscriptions
- Real world relevance
  - Industry-standard
  - Global perspective
- Credible research
  - 35 years’ of experience
  - Robust proven methodologies
- Quality delivery system
  - Powerful analysis functions support interactive learning
  - Intuitive online navigation
- Promotional support
- On and off campus access
Category Watch: Premium RTD coffee offers potential in South Korea
The premium segment is showing the way forward for manufacturers by adding further value to the Korean market...

Trend Watch: Eco-nutrition
It is slowly dawnning on consumers that, in the face of global warming and food shortages, eating within environmental limits is the only way forward. Gradually, they are turning away...

Comment
Earth Day special: Solar-powered products - sunny consumer verdict?
With Earth Day (April 22nd) upon us, environmental themes remain high on the consumer agendas. Rising energy bills and concern about climate change are leading to increased consumer interest in... from Global Consumer Trend Monitoring

Growth forecasts slashed for Italy
In its April 2008 forecasts, the International Monetary Fund (IMF) cut its growth estimate for Italy for 2008 dramatically from 3.3% to 0.3%. Although others believe the forecasts are too low from Country Insight

West African tourism sees growth
Tourism in West Africa has significant potential, particularly in countries with a stable political outlook such as Ghana and Senegal. White arrivals and receipts have increased substantially...
Industries we research
Table of Country Statistics

### Market Sizes • Historic • Value at Current Prices

#### Total GDP

<table>
<thead>
<tr>
<th>Country</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>2,165,180.0</td>
<td>2,163,000.0</td>
<td>2,211,200.0</td>
<td>2,244,000.0</td>
<td>2,322,200.0</td>
<td>2,424,595.0</td>
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<tr>
<td>Greece</td>
<td>1,775,050.0</td>
<td>1,712,500.0</td>
<td>1,825,200.0</td>
<td>1,895,000.0</td>
<td>2,123,900.0</td>
<td>2,209,840.0</td>
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<tr>
<td>Turkey</td>
<td>2,674,000.0</td>
<td>2,609,200.0</td>
<td>2,630,500.0</td>
<td>2,687,000.0</td>
<td>2,802,000.0</td>
<td>2,872,000.0</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1,655,700.0</td>
<td>1,184,300.0</td>
<td>1,184,300.0</td>
<td>1,335,300.0</td>
<td>1,363,570.0</td>
<td>1,384,650.0</td>
</tr>
</tbody>
</table>

#### Annual disposable income

<table>
<thead>
<tr>
<th>Country</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>1,447,340.0</td>
<td>1,475,160.0</td>
<td>1,552,830.0</td>
<td>1,528,690.0</td>
<td>1,562,436.0</td>
<td>1,600,423.0</td>
</tr>
<tr>
<td>Greece</td>
<td>1,039,900.0</td>
<td>1,125,500.0</td>
<td>1,214,340.0</td>
<td>1,300,160.0</td>
<td>1,359,520.0</td>
<td>1,505,390.0</td>
</tr>
<tr>
<td>Turkey</td>
<td>1,827,200.0</td>
<td>2,198,600.0</td>
<td>2,809,200.0</td>
<td>3,137,310.0</td>
<td>3,673,180.0</td>
<td>4,13,158.0</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>697,460.0</td>
<td>729,360.0</td>
<td>757,930.0</td>
<td>792,232.0</td>
<td>833,371.0</td>
<td>879,302.0</td>
</tr>
</tbody>
</table>

#### Possession of cable TV

<table>
<thead>
<tr>
<th>Country</th>
<th>% of households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>57.2</td>
</tr>
<tr>
<td>Greece</td>
<td>0.0</td>
</tr>
<tr>
<td>Turkey</td>
<td>15.0</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>15.0</td>
</tr>
</tbody>
</table>

#### Possession of mobile telephone

<table>
<thead>
<tr>
<th>Country</th>
<th>% of households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>68.0</td>
</tr>
<tr>
<td>Greece</td>
<td>68.0</td>
</tr>
<tr>
<td>Turkey</td>
<td>67.1</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>76.8</td>
</tr>
</tbody>
</table>

#### Population aged 15: January 1st

<table>
<thead>
<tr>
<th>Country</th>
<th>% of households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>65.0</td>
</tr>
<tr>
<td>Greece</td>
<td>65.0</td>
</tr>
<tr>
<td>Turkey</td>
<td>67.1</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>76.8</td>
</tr>
</tbody>
</table>

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Ready Meals - Bulgaria
30 Apr 2006

HEADLINES
- Ready meals achieve impressive growth, over 11% in volume in 2007
- Companies stress marketing activities in addition to the manufacturing process
- Chilled ready meals hit record growth of over 68% in value in 2007
- Average unit prices increase slightly over the review period
- Niklas SA enters ready meals and grabs almost 4% of the value share in 2006
- CAGR growth of 6%-7% expected in constant value and volume over the forecast period

TRENDS
- In the last few years of the review period, ready meals companies were mainly focused on improving the quality of their products in order to attract consumers and comply with the strict standards imposed by the EU. Throughout the review period, however, companies invested significant amounts of money on different marketing activities for popularizing their brands and attracting the attention of consumers. Niklas SA, for example, launched a notable marketing campaign. Other leading companies like Miss Kapris OD and Kesar-Zare ET, on the other hand, invested in updating their websites, making them more accessible and user-friendly. Kesar-Zare ET even won a prize in the prestigious contest, Website of the Year, held during the review period.
- Chilled ready meals was undoubtedly the most successful type of ready meals in 2007. Its impressive growth was due to the relatively low base to some extent - chilled ready meals accounted for less than 7% of ready meals total value sales in 2007. In addition to the low base, the fact that chilled ready meals is new to the country further raised consumers' interest. Last but not least, the increasingly busy and hectic lifestyle of Bulgarian market in the demand for convenient and healthy types of ready meals...
Timely comment on events making the news

Growth forecasts slashed for Italy
21 Apr 2008

In its April 2008 forecasts, the International Monetary Fund (IMF) cut its growth estimate for Italy for 2008 dramatically: from 1.8% to 0.3%. Although others believe the forecasts are too negative, the report will affect consumer and business confidence. Despite the electoral victory of the former Prime Minister Silvio Berlusconi in April 2008, confidence is likely to remain subdued until domestic politics settle down.

Issue

The IMF slashed its growth estimate for Italy by one percentage point to 0.3% for 2008 amid continued sluggish performance, an uncompetitive economy and the global slowdown:

- Among the advanced economies, Italy’s growth is forecast to be the slowest in 2008 and 2009.

Real GDP growth of selected advanced economies: 2007-2009

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced economies</td>
<td>2.7</td>
<td>1.3</td>
<td>1.3</td>
</tr>
<tr>
<td>USA</td>
<td>2.2</td>
<td>0.5</td>
<td>0.6</td>
</tr>
<tr>
<td>Germany</td>
<td>2.5</td>
<td>1.4</td>
<td>1.3</td>
</tr>
<tr>
<td>France</td>
<td>1.9</td>
<td>1.4</td>
<td>1.2</td>
</tr>
<tr>
<td>Italy</td>
<td>1.5</td>
<td>0.3</td>
<td>0.3</td>
</tr>
<tr>
<td>Spain</td>
<td>3.8</td>
<td>1.8</td>
<td>1.7</td>
</tr>
<tr>
<td>Japan</td>
<td>2.1</td>
<td>1.4</td>
<td>1.5</td>
</tr>
<tr>
<td>UK</td>
<td>3.1</td>
<td>1.6</td>
<td>1.6</td>
</tr>
<tr>
<td>Canada</td>
<td>2.7</td>
<td>1.3</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Source: IMF

- Government officials claim the IMF forecast is too negative - the Italian government forecast for 2008 is
Thank you!

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