

GfK

GfK GeoMarketing

News

01 | 2008



Purchasing power on the rise

This year Germans have, on average, 700 euros more at their disposal than in 2007. Wealth is growing faster than inflation, an optimal condition for retail success in 2008.

Other topics:

RegioGraph-Microsoft Office 2007 bundle, GfK Demographics data, integration of RegioGraph with Microsoft Dynamics™ CRM, GfK map webshop, European real estate market successes...

Trade Fair

Meet us at the CeBIT in Hannover from March 4-9, 2008! You'll find us at the Microsoft Partner Stand in Hall 4, Stand A26, P8.

Free poster

This issue's free map illustrates the distribution of senior citizens throughout Germany – an increasingly important target group in today's market.

Welcome to GfK GeoMarketing News!



Dear Reader,

An exciting and promising new year lies before us. We're committed to helping you achieve success in your European markets through our dynamic geomarketing products and services.

We're happy to share some good news: the purchasing power of the German population has risen significantly this year. Naturally, it remains to be seen how much price increases will impact on consumer confidence. But generally, conditions are favorable for growth in the retail sector, at least with regard to consumers' purchasing power.

I'm also pleased to announce two important developments. RegioGraph will be bundled with Microsoft Office 2007 beginning in April. We'd love to demonstrate the benefits to you personally at the upcoming CeBIT Trade Fair from March 4-9 in Hannover. In other news, our geomarketing solutions have been further enhanced through the addition of a Customer Relationship Management (CRM) add-on to RegioGraph and DISTRICT, thanks to the help of connectiv! eSolutions. This makes working with customer data from Microsoft's CRM application easier and quicker than ever!

In the field of digital cartography, we have, as ever, our finger on the pulse. For example, we already offer maps reflecting the new postal code boundaries in New Zealand (to be officially implemented in August 2008). We've also completely updated our map set for Australia, giving you the latest information you need to plan and optimize your markets in these regions.

I wish you a successful and prosperous 2008!

Sincerely,
Dr. Eberhard Stegner
Management Board, GfK GeoMarketing

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New at GfK GeoMarketing

R RegioGraph 10 now bundled with Office!

The new RegioGraph-Office bundle brings together all of the functions and capabilities of Microsoft Office and RegioGraph. RegioGraph can now be accessed within Word, Excel and PowerPoint, allowing users to easily and quickly integrate maps and RegioGraph spreadsheets into Office applications.

Read more about the new RegioGraph-Office bundle on page 6. We'd also be happy to show you personally at the CeBIT Trade Fair from March 4-9 in Hannover. To make an appointment, call Sonja Scharf at +49 (0)7251 9295110.

i Purchasing Power 2008: Good news for retail trade

The latest purchasing power study reveals that 2008 promises to be a fruitful year for retail trade. Germans have on average 700 euros more per person at their disposal than in 2007 – a level of growth that significantly outpaces the predicted rate of inflation. The study provides insight into the regional distribution of consumer potential for counties, municipalities and postal code districts throughout Germany. Southern Germany – in particular, Bavaria – weighs in well above the average. But there are also encouraging signs in Germany's eastern federal states.

See the lead article on pages 4 and 5 for more details.

New CRM tool for **R** RegioGraph and **D** DISTRICT

Importing large address files was already a cinch with RegioGraph 10 and DISTRICT 10. This task is now even easier for Microsoft's CRM application users, who can import and export data without having to switch between programs. The CRM2GfK add-on from connectiv! eSolutions provides an elegant and efficient solution to the importing of large address files into RegioGraph and DISTRICT maps. Address data can just as easily be exported to the CRM application and combined with existing contact information.

See page 14 for a description of the CRM add-on. We'll also be presenting this new feature at the CeBIT Trade Fair.

o Digital map partnership with MapInfo

GfK GeoMarketing recently established a partnership with MapInfo, one of the world's largest suppliers of geographic information systems (GIS). MapInfo customers and users now have direct access to GfK GeoMarketing's high-quality worldwide maps.

GfK GeoMarketing's worldwide digital maps are available in all standard data formats: RegioGraph/DISTRICT, MapInfo (.mid, .mif) and ESRI (.shp).

For more information, call Friedlind Dürr at +49 (0)7251 9295230 or visit www.gfk-geomarketing.com/digital_maps.htm.

GfK GeoMarketing welcomes its 100th employee

Our company reached the 100-employee milestone on January 10 when three new colleagues joined Marketing and Sales in Bruchsal and Market Data & Research in Nuremberg. We're now well on our way to the next landmark, with three additional employees expected to take up positions in the coming weeks. We'll be thrilled about this level of growth and delighted that this will enable us to continue offering the highest quality services and products to our customers around the globe.



Job opportunities

GfK GeoMarketing is currently seeking to fill positions in sales, location research and software development. Interested applicants can view job descriptions at www.gfk-geomarketing.com/unternehmen/karriere/career.htm.

Purchasing power on the rise

This year Germans have, on average, 700 euros more at their disposal than in 2007.

Wealth is growing faster than inflation – a promising outlook for the retail industry in 2008.

German consumers have a combined net income of 1,542 billion euros at their disposal for 2008, according to the results of our recently published study. This corresponds to an average income of 18,734 euros per person, per year (these figures take into account social welfare assistance such as unemployment benefits, child support and rent assistance).

Statistically, this amounts to almost 700 euros more per person than in the preceding year, comprising a growth rate of around 3.8%. The per person purchasing power is thus growing faster than the European Central Bank's maximum predicted inflation rate of 2% for 2008. This means that Germans have more money at their disposal for rent, savings, services and retail purchases in 2008 than in 2007.

"Germans' purchasing power has consistently been on the rise over the years," explains GfK GeoMarketing researcher Simone Baecker-Neuchl, an expert on purchasing power. "While growth rates have not been astronomical, the average level of prosperity has increased steadily. The chief economic challenge is to encourage spending amongst Germans, who tend to be avid savers. One way of doing this is for the retail and service industries to present them with interesting and varied options."

Bavaria leading the way

The study reveals that there are significant regional variations in purchasing power levels, a fact that can markedly influence the outcome of sales territory planning decisions. For example, with an average of 20,340 euros per person at their disposal, Bavarians are Germany's most affluent group. The average purchasing power in more than a quarter of all Bavarian cities and adminis-

trative districts is at least 10% higher than the nation-wide average.

The purchasing power of the administrative districts east of Munich is also well above average and will rise yet further in 2008. Seven of Germany's 10 most affluent counties are located in Bavaria (see spreadsheet), which also claims as its own 39 of the country's 100 most prosperous counties.

The inhabitants of the federal state of Baden-Württemberg also enjoy an above-average purchasing power, with an average of 20,026 euros per person per year at their disposal. Sixteen of Germany's 100 most affluent counties are located in this state, while Hesse claims 12, and North Rhein-Westfalia 15. The outlying areas of Hamburg are also notable for their above-average purchasing power. More broadly analyzed, the country's level of prosperity is notably higher along a north-to-south-running axis positioned west of Germany's geographic center.

Eastern promise

In contrast to the situation in the west, the purchasing power of all counties in the eastern federal states lies, without exception, below the national average. Still, on a more positive note, the dip in prosperity as one goes from west to east varies, at most, up to 25% compared to the national average – a marked improvement over previous years. This is also true for the long-suffering counties in Mecklenburg-Vorpommern. In short, prosperity levels in the east continue to climb, even if a notable gap still exists between west and east.

Top 10 Districts with the highest purchasing power per capita

Ranking	District	Purchasing power 2008 per capita and year in euros	Purchasing power index per capita (German average =100)
1	Starnberg / Bavaria	27,283	145.6
2	Hochtaunuskreis / Hesse	27,192	145.1
3	Main-Taunus-Kreis / Hesse	25,939	138.5
4	Greater Munich area / Bavaria	25,931	138.4
5	City of Munich / Bavaria	25,696	137.2
6	Ebersberg / Bavaria	25,163	134.3
7	Fürstenfeldbruck / Bavaria	24,223	129.3
8	Erlangen / Bavaria	23,646	126.2
9	Stormarn / Schleswig-Holstein	23,316	124.5
10	Dachau / Bavaria	23,128	123.5

Even so, there are some regions in the east that are growing more quickly than certain western regions. With an average yearly income of 17,183 euros, Dresdeners have about 1,000 euros more in their pockets than inhabitants of the Bavarian town, Regen.

“Dresden and the other growing economic centers in Saxony and Thuringia – Chemnitz, Gera, Jena and Erfurt – offer the other eastern counties a model for economic prosperity,” comments Dr. Eberhard Stegner, a member of GfK GeoMarketing’s Management Board.

Suburbs more affluent than city centers

The purchasing power study measures disposable income based on consumers’ residence rather than the point-of-sale. GfK Purchasing Power consequently gives companies an ideal tool for assessing regional consumer potential and planning catchment areas accordingly.

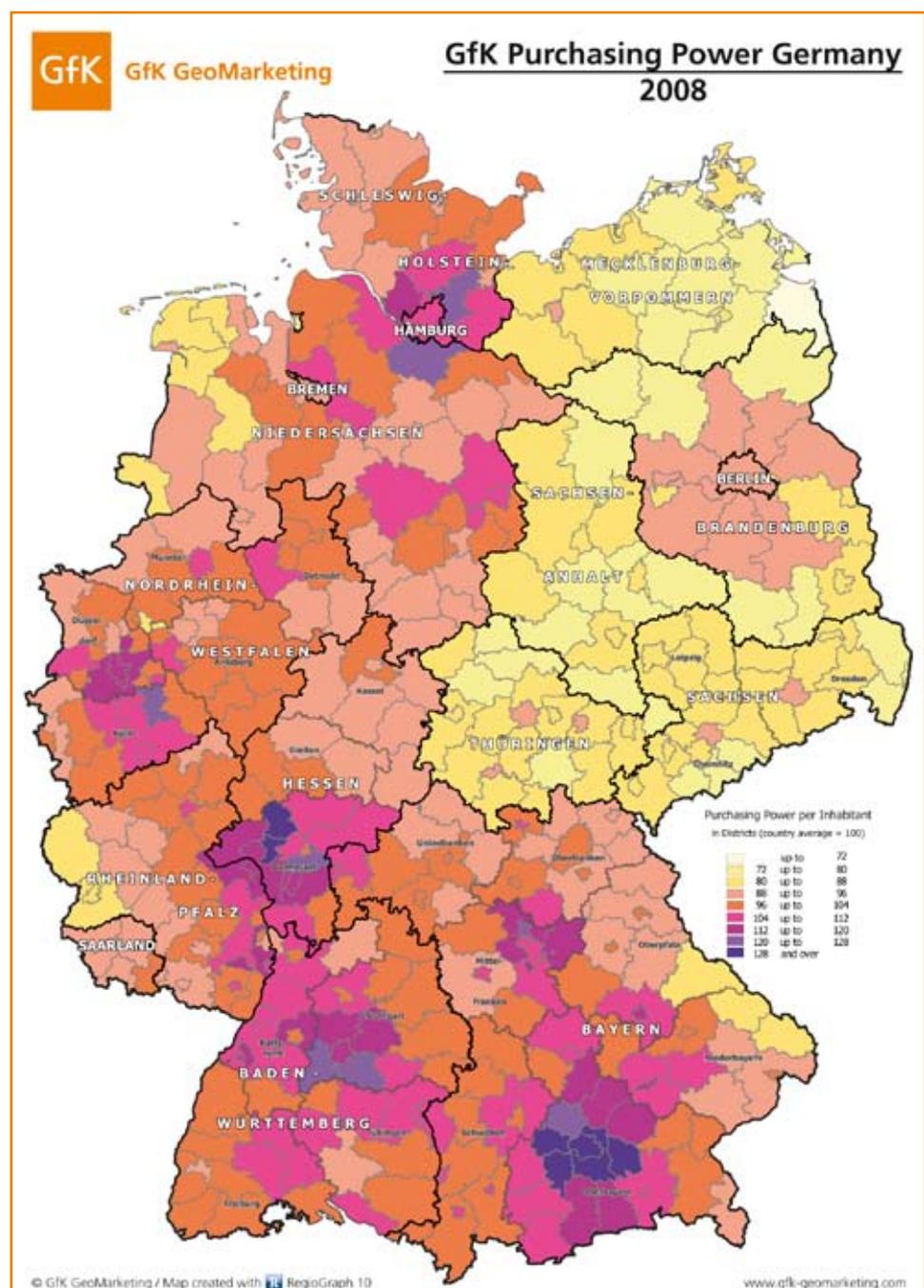
The established trend for the affluent to migrate toward suburban areas continues to hold. As the only city in the country’s top 10 list, Munich constitutes the exception that proves the rule. Much more common is the situation in Karlsruhe, where the suburban areas have a purchasing power around 9% (rank 61) above the national average, while the city itself is only 4.5% (rank 110) above the average. This – and other such examples – can be explained by the fact that many inner-cities have a shortage of residential areas; and those they have possess a markedly lower purchasing power than the outlying suburbs. Studies have shown that inner-city residential areas – particularly in large metropolitan centers – are populated by a high percentage of typically low-income groups, such as students, recent graduates and immigrants.

Study details

GfK has produced yearly purchasing power figures since 1937. The data reveal disposal income levels after the deduction of income tax and state taxes, as well as social security contributions. The resulting figures are given in per head yearly values (in euros) and in the form of an index (German average = 100). Calculations are carried out on the basis of reported income and earnings, as well as economic forecasts provided by the leading economic institutes. GfK Purchasing Power figures are compiled for all German counties, municipalities and postal code regions, as well as for 2.5 million street segments.

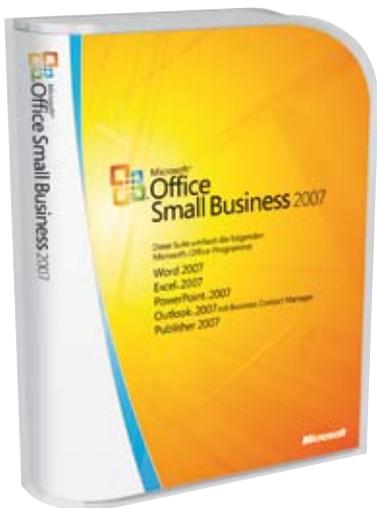
For further information, contact Alexandra Deutsch at +49 (0)7251 9295170 or a.deutsch@gfk-geomarketing.com.

Additional details on the significance, calculation methods and availability of purchasing power data can be found at www.gfk-geomarketing.com/purchasingpower



RegioGraph and Microsoft Office: A dynamic duo

Our customers have long celebrated our software's compatibility with Microsoft Office. We've now achieved an even more seamless integration of these applications through the RegioGraph-Office 2007 bundle.



RegioGraph is available as a bundle with Microsoft Office beginning in April 2008. Users of the product will benefit from the newest generation of RegioGraph 10 – the favored geomarketing solution for marketing and sales divisions in German companies – as well as the full version of Microsoft Office Small Business 2007.



This isn't just a coupling of names: RegioGraph's functions are accessible via a menu in Word, Excel and

PowerPoint, making the importing of data and maps in Office documents, reports and presentations easier and quicker than ever. There's no longer a need to switch back and forth between applications. Naturally, both applications remain fully autonomous, allowing you to work purely within the selected environment.

But there are some attractive advantages to utilizing the integration of RegioGraph with the MS Suite applications. For example, you can export an Excel spreadsheet detailing your sales territory structure directly into RegioGraph without having to exit or switch applications. Likewise, you can quickly "grab" a spreadsheet column from within RegioGraph and pull it into Excel for the purpose of performing calculations. When you're finished, the edited spreadsheet can then be sent back into RegioGraph without having to export the data! The same functionality applies to the importing of maps. When bringing a RegioGraph map into an MS Office application, users also have the option of specifying the file format – e.g., bitmap, or vector graphic.

"As most of our software users work quite a bit with the MS Office applications, we've taken pains to design our programs such that they facilitate a smooth transition from the well-known Microsoft environment," says Alexander Pachwald, project leader of the RegioGraph-Microsoft Office bundle initiative and software developer at GfK GeoMarketing. "Today there is the expectation that mapping and spatial analysis software should be straightforward and intuitive. Not only does our software fulfill these criteria, but it's also as easy to use as Excel or Word, and now it's seamlessly integrated into these applications."

This new integration of RegioGraph with the MS Office Suite enables users to easily and efficiently incorporate geomarketing analyses and solutions into their daily usage of Microsoft Office applications. This exciting new develop-

ment is ample reason to upgrade to Office 2007 and RegioGraph 10.

If you have any questions about the Office-RegioGraph 10 bundle, please contact Thorsten Lauszus at +49 (0)7251 9295145 or t.lauszus@gfk-geomarketing.com.

The Office-RegioGraph 10 bundle is available beginning in April 2008.

The Office-RegioGraph 10 bundle is only available in a German Version.

We'd be happy to personally show you the features of the new RegioGraph-Office bundle at the CeBIT Trade Fair in Hannover from March 4-9.

You can find more information about RegioGraph 10 at www.gfk-geomarketing.com/regiograph

Included with purchase is a full license for the installation and use of both RegioGraph and Microsoft Office Small Business 2007. Both applications include a trouble-free installation wizard.

View the system requirements at www.gfk-geomarketing.com/system_requirement

And where do you want to go?



Worldwide maps and market data for your analyses:

- Vector maps of municipal areas, postal code areas and city points
- Covering more than 240 countries, without gaps or overlaps
- Seamlessly fitting Maps and market data
- Updated regularly
- Ready to use in all standard GIS and CRM systems

GfK GeoMarketing provides the world's largest digital collection of administrative and postal code maps. Our GfK Purchasing Power and other GfK market data are a perfect supplement to the maps. Discover the high quality for yourself by downloading free maps and purchasing power samples.

For more information, please call +49(0)72 51 9295230
or visit www.gfk-geomarketing.com/digitalmaps.

GfK Demographics data – Precision marketing for enhanced profitability

What is the geographic distribution of one-person households, retirees, families with children, or big earners? The new GfK Demographics data answer all of these questions and more, providing comprehensive socio-demographic information for all of Germany.

An attractive brochure about gardening languishes in a trash can. A closer look reveals that dozens of copies of this same brochure have suffered the same fate, all of them quickly discarded by potential readers. Do inhabitants of this particular neighborhood simply have no interest in gardening? They probably do, but it's a mute issue, because most of them live in high-rise apartments, with little or no access to green spaces.

Too often marketing campaigns are not adequately targeted, resulting in missed opportunities and wasted resources. In today's highly competitive and quickly growing markets, companies can no longer afford marketing efforts that simply miss their mark.

Luckily, GfK GeoMarketing offers a solution in the form of GfK's yearly updated socio-demographic data, allowing sales and marketing divisions to pinpoint the location of their target groups and carry out more precise and response-generating advertising campaigns. The data include information on the distribution of specific groups and their living environments, such as the age of the inhabitants or the architectural profile of their neighborhoods. This valuable information is available not only for individual federal states, but also for counties, municipalities, five-digit postal code districts and even individual street segments! This level of detail and comprehensiveness facilitates precise calculations and marketing campaign-planning. For example, you can easily discover which five-digit postal areas have a particularly high percentage of multiple-person households with children, a combined monthly income over 4,000 euros, or residents between the ages of 50 and 60. Such information could be used to distribute the aforementioned gardening brochures to areas with a higher concentration of 1-2 family houses, a targeted approach that would generate more results.

The GfK Demographics data constitute a powerful tool for geographically identifying your target groups. The data on German residents can be organized according to age, income level, family structure and the type of environments. Because data are provided for individual municipalities and postal code districts, it can be easily formatted to correspond to the structure of branch

locations and/or sales force service regions.

The comprehensive and flexible nature of GfK's Demographics data thus lends itself to many applications. Target groups and market potential can be quickly and efficiently identified by selecting for certain relevant criteria. Particularly useful is the ability to see the precise distribution of your target groups within a specified region, thereby allowing you to capitalize on those areas of your markets where you stand to gain the most. The data thus serve as an indispensable tool for well-planned marketing campaigns. Also, the areas you identify as fruitful for your marketing campaigns are often precisely the areas best suited for a new branch or supply point.

To return once more to the gardening brochure: it's clear that a fine-tuned marketing campaign that strategically canvases those areas mostly likely to take an interest in the product will enjoy a much higher rate of success. By intelligently positioning your advertising, mailings and signage, you can expect rather than the disappointment of seeing your hard-earned time and money go to waste.

Grow your business today with the help of this valuable data set from GfK.

GfK's new demographics data are available now. For more information, please contact Moritz Boesken at +49 (0)7251 9295370 or m.boesken@gfk-geomarketing.com.



Need a boost?



Software-Training

Discover the new Features of RegioGraph 10 and DISTRICT 10

Are you a user of an older RegioGraph or DISTRICT version? Do you feel you could do with some brushing up? Get to know the new functions of RegioGraph 10 and DISTRICT 10 in one of our one-day training-courses for advanced user's!

Our software training gives you

- practice in carrying out a wide range of geomarketing tasks
- complementary handouts including a CD-ROM containing all exercises
- a good learning environment in small groups (max. 7 participants)

The new GfK map webshop – Order paper maps online

Beginning in late February, GfK GeoMarketing will begin offering many of its maps in paper form, in association with Bacher Verlag. Ideal for hanging on the wall, these high-quality maps can be ordered from the new GfK map webshop.

A purchasing power map of Germany or Europe, a two-digit postal code map of Turkey, an overview map profiling French households. Beginning in late February, these and many other top-quality paper maps can be ordered online at GfK's map webshop at www.gfk.mapshop.info. Initially we'll be offering maps for eight European countries, available in various formats ranging from a laminated edition to a mounted collection containing all maps.

the maps, drawing on its many years of experience and acknowledged expertise in this area.

The webshop will open in late February and is accessible at www.gfk.mapshop.info. Happy browsing!

For more information on the webshop or GfK GeoMarketing's maps, contact Alexandra Deutsch at +49 (0)7251 9295170 or a.deutsch@gfk-geomarketing.com.

GfK GeoMarketing's paper maps give companies an ideal way of visualizing their markets in the form of attractive wall maps. Colleagues can use the maps as a frequent source of reference regarding the location of the cities, regions and/or purchasing power distributions most relevant for their company's operations. These wall maps thus serve as an ideal complement to GfK GeoMarketing's digital and software-based solutions.

While wall maps undoubtedly have a supplementary role to play, a comprehensive and professional market analysis is best carried out with the help of detailed, digital maps and the latest market data in combination with a geo-marketing software application, such as RegioGraph 10 or DISTRICT 10.

Wall maps are, however, a good first step for establishing an overview of your markets and brightening up your office place. We ensure the highest quality and precision in the printed maps, paying particular attention to the preservation of scale. Bacher Verlag oversees the printing process and distribution of



Newly digitized maps for Australia and New Zealand

Do you have existing or potential markets in Australia or New Zealand? GfK GeoMarketing now offers newly digitized maps for both countries, with comprehensively updated postal code, administrative and topographical maps. These updates include the upcoming postal code reform in New Zealand, scheduled to take effect on July 1, 2008. Further highlights include more detailed and finely rendered coastlines and new maps of city areas and the rail network.

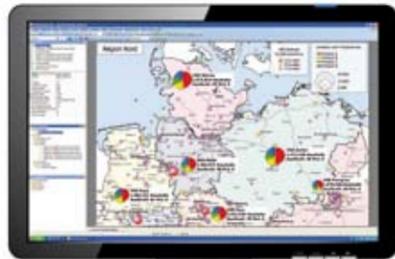
GfK GeoMarketing offers the newly digitized Australia and New Zealand map sets in the standard GIS data formats. Further information can be obtained from Alexandra Deutsch at +49 (0)7251 9295170 or a.deutsch@gfk-geomarketing.com.



Unbounded GeoMarketing with **R** RegioGraph 10 / **D** DISTRICT 10:

Convincing presentation of results:

Presentations

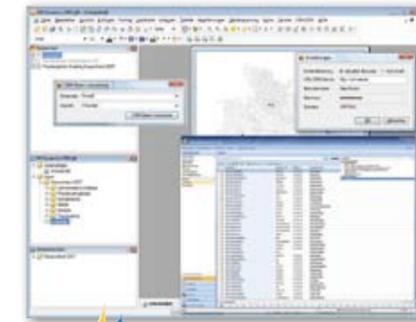


www.gfk-geomarketing.com/show

Market optimization through:
Customer analysis
Market analysis
Sales controlling
Location appraisal
Sales territory planning

Multiple add-on possibilities:

CRM-link up



Microsoft Dynamics

www.gfk-geomarketing.com/crm

Seamlessly integrated enhancement options:

Market Data



www.gfk-geomarketing.com/marketdata

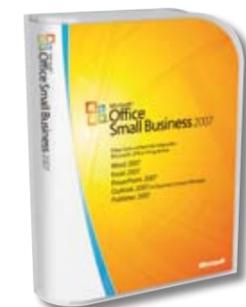
Digital Maps



www.gfk-geomarketing.com/digitalmaps



RegioGraph/ Office-Bundle



www.gfk-geomarketing.com/office

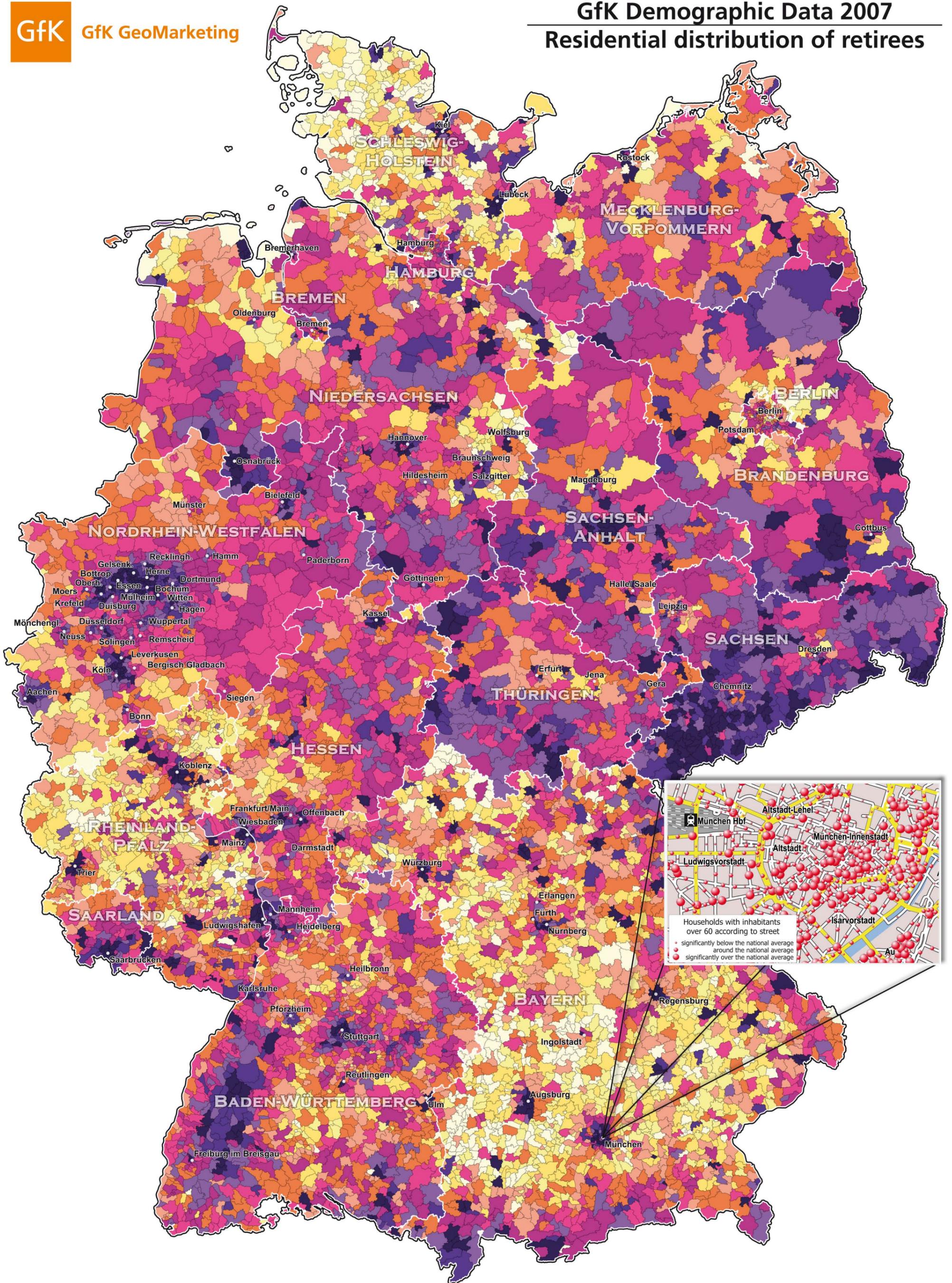
Interface for program- ming add-ons



www.gfk-geomarketing.com/addons

GfK GfK GeoMarketing

www.gfk-geomarketing.com/software



Percentage of households whose inhabitants are 60 and over (according to postal districts)

under 20.0%	20.0% - 22.5%	22.5% - 25.0%	25.0% - 27.5%	27.5% - 30.0%	30.0% - 32.5%	32.5% - 35.0%	35.0% - 37.5%	37.5% - 40.0%	over 40.0%
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Tutorial:

Print your maps in the desired format

RegioGraph and DISTRICT offer more than 30 different printing formats, including a user-defined setting in which you can select the precise dimensions that correspond to your needs. Here's how to adjust the settings.

In RegioGraph 10 and DISTRICT 10, you can always print the map currently showing in your work space by selecting **Print** from the **File** menu. The printed map will look exactly like the map you see on your screen. The default printing format is DIN A4 (210 mm x 297 mm).

It's very simple to select a different format – e.g., DIN A3 (297 mm x 420 mm). To do so, follow these three easy steps:

Step 1

From the **File** menu, select **Page Setup**, and choose the DIN A3 format.

Should you wish to change the page orientation (from portrait to landscape, or vice versa), place a checkmark next to the desired option.

Step 2

Select the corresponding format in your printer options by clicking on **Printer Setup** in the **File** menu.

Step 3

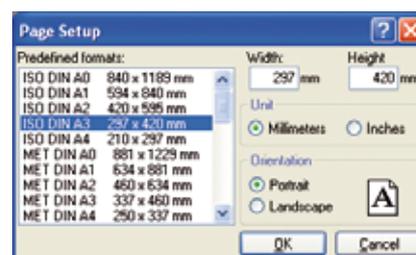
Check the results of your selection by going to the **File** menu and selecting **Print Preview**.

If you've successfully synchronized the page setup and printing format options, your entire map should appear on one page.

If you'd like to print two DIN A4 sheets and assemble them together – e.g., if your printer isn't capable of printing the DIN A3 format – then leave your printer setting on DIN A4. As the DIN A3 format is twice as large as the DIN A4 format, change your work space format to landscape orientation via the **File > Page Setup** menu option. Your map will then span two pages when you go to print preview.

Via this same method, you can use a DIN A4 printer to produce large posters up to DIN A0 (841 mm x 1,189 mm) dimensions.

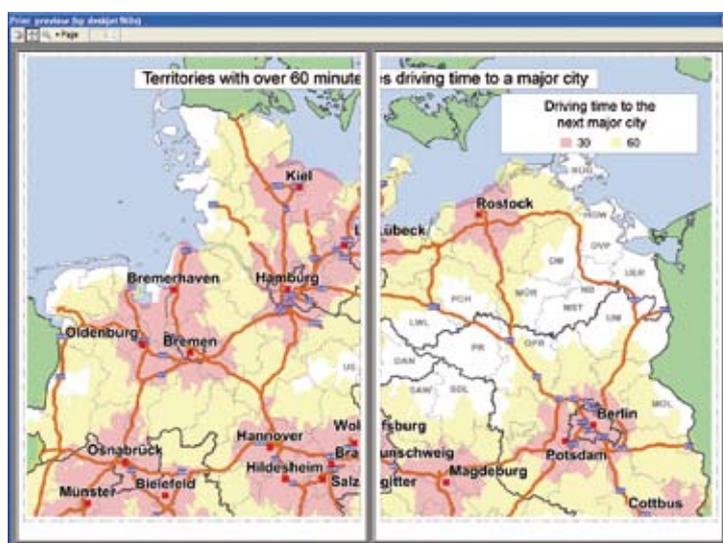
More tutorials are available at www.gfk-geomarketing.com/tutorial.



Step 1: Page orientation



Step 2: Printer options



Step 3: Print Preview

Automated map creation

Via a special “AutoMap” tool, the company TENTE-ROLLEN uses DISTRICT to automatically generate 85 different weekly updated HTML-maps with the mere click of a button.

Since 1923, the company TENTE-ROLLEN has been working hard at its headquarters in Bergischen Land (a region of the German federal state of North Rhein-Westfalia) to perfect an invention that has been in existence for millennia: the wheel. What began as a small business producing ball bearings and furniture rollers is now a global enterprise with more than 10,000 product types for sale in over 100 countries. The company’s continually growing network of suppliers, subsidiaries and business partners in all major markets requires an ever-increasing amount of maintenance in order to ensure a continued stream of production.

In order to simplify and optimize its sales operations, the company implemented usage of both the sales territory planning geomarketing solution, DISTRICT, and a customer relationship management (CRM) system. The data contained in the CRM (e.g., potential, visits to customers, turnover, etc.) were then visualized via DISTRICT and transmitted to the sales team in the form of weekly updated HTML maps. This approach had numerous advantages, one of which was to quickly reveal any gaps in the customer zones serviced by individual members of the sales force.

The challenge of this approach was the weekly production of 85 different HTML maps, each structured according to a unique combination of data, geographic region and sales force assignments. Naturally, the manual production of these many maps is very time-consuming.

TENTE therefore sought out a way to automate this process. They turned to Zim-Tec, a longstanding business partner of GfK GeoMarketing that specializes in providing client-centered solutions for the optimization of business practices through the use of RegioGraph and DISTRICT. Zim-Tec had the ideal

solution for TENTE’s problem in the form of an “AutoMap” add-on for RegioGraph and DISTRICT that automated the map-production process. The solution was realized in three steps:

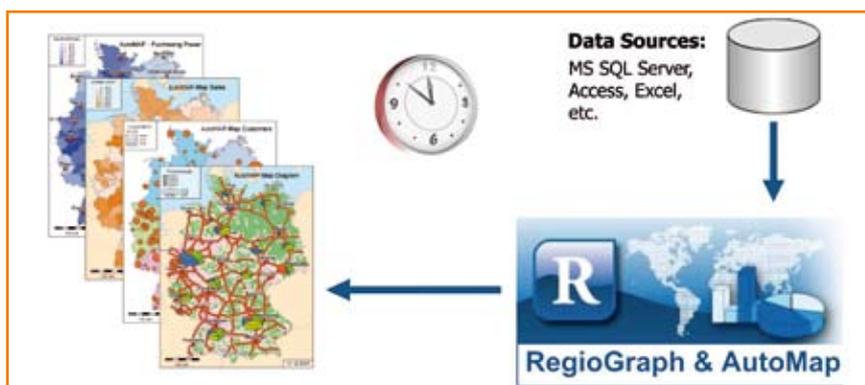
- The required parameters (such as size, resolution, theme, layout and legend) for each of the 85 maps were noted.
- A DISTRICT project containing the required data and maps was created.
- The AutoMap add-on was implemented in order to automate the data updating procedure and the production of the HTML maps.

Because TENTE had already been using DISTRICT for its sales territory planning, its staff were easily able to carry out the first two steps. After the introduction of the AutoMap feature, TENTE was able to assume full control of the automatization process with the help of this efficient, easy-to-use and elegant solution.

The AutoMap add-on offers the following features:

- Automatic updating of data from standard data sources (SQL, Access, Excel, etc.)
- User-defined variables for each individual worksheet, ranging from the map dimensions to the Tooltip labels
- Ability to selectively display or hide layers within each individual worksheet
- Automatic production of user-defined labels, such as the date on which the file in question was saved, or company-relevant statistics





Automated map creation

- Output of maps in HTML, PDF or graphic formats
- User-definable time settings for generating automated calculations and maps

Bela Wantschura, director of customer services in TENTE's international sales division, is enthusiastic about the results of the implemented DISTRICT/AutoMap solution.

"The creation of maps using AutoMap is very easy and straightforward. We're currently generating 85 different maps, each of which is updated every Friday.

We are already planning to expand our usage of this tool," he explains. "Prior to the introduction of the AutoMap feature, we had to create each of these maps manually. We're now saving a tremendous amount of time."

What if you'd like for new worksheets to automatically be saved as HTML maps? This and other user-defined preferences can easily be accommodated using the dialog windows integrated into AutoMap.

The AutoMap add-on is available for all interested DISTRICT and RegioGraph users. More information can be found at www.gfk-geomarketing.com/automap.

GfK GeoMarketing - The Institute for Location and Real Estate Research in Europe

Internationally recognized GfK PRISMA Expert Reports

- Market and Location Analyses
- Real estate Advice
- Due diligence & portfolio-analyses
- Store network planning and optimization
- Feasibility Studies
- Municipal consulting

Better customer management through CRM integration in RegioGraph/DISTRICT

A new RegioGraph and DISTRICT add-on developed by connectiv! eSolutions allows for quicker and more flexible importing of addresses from Microsoft Dynamics™ CRM.

CRM systems assist companies in the optimization of their customer-related business processes. Marketing, sales and customer service divisions require an easy-to-use and efficient data management solution in order to work together fluidly. The integration of Microsoft Dynamics™ CRM with the well-known Office applications is a definite step in the right direction. GfK GeoMarketing now also offers a solution to its users that will further enhance their data management.

The CRM2GfK add-on will be presented at the CeBIT in Hannover from March 4-9. If you have questions or would like to make an appointment, please contact Nicole Lahr at +49 (0)7251 9295160 or n.lahr@gfk-geomarketing.com.



Connectiv! eSolutions, one of the leading Microsoft Gold Certified Partners with regard to Dynamics™ CRM, has developed a software solution that integrates the CRM application with the geomarketing functions of RegioGraph and DISTRICT. Appropriately named "CRM2GfK," this new add-on directly links data from Microsoft Dynamics™ CRM with GfK GeoMarketing's software applications, RegioGraph 10 and DISTRICT 10.

Features of CRM2GfK

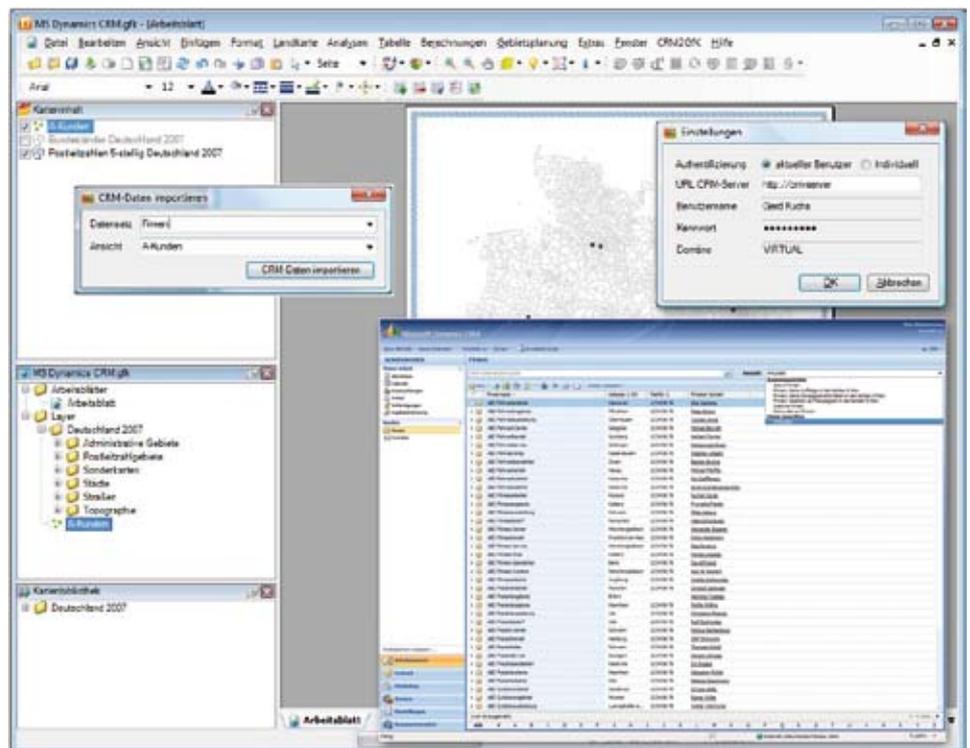
- Easily configurable
- Simple-to-use
- Compatible with Microsoft Dynamics CRM 3.0 and 4.0
- Available for RegioGraph 10 and DISTRICT 10

All information at a glance

Users of CRM2GfK can import data from Dynamics CRM directly into DISTRICT or RegioGraph for further analysis and visual representation.

The connection to the CRM server is accomplished through a simple configuration procedure. Once established, it's incredibly easy to import data, and you'll be amazed at how much time you'll save by not having to switch back and forth between applications.

RegioGraph and/or DISTRICT users who also work with Microsoft's CRM application can enhance their productivity through this dynamic new tool.



Record growth in Europe's real estate markets

Overview of 2007 – Experts at GfK GeoMarketing's PRISMA Institute assess the performance of the 2007 European real estate markets and offer a forecast for 2008 based on existing trends.

2007 was a dynamic and exciting time for Europe. The continent's political and economic clout palpably increased with the entry of 30 million Romanians and Bulgarians into the EU on January 1, 2007 and the introduction of the euro in Slovenia. This growth was reflected in the pinnacle exchange rate achieved by the euro against the dollar in the fourth quarter.

2.9% economic growth in the EU

Approximately 500 million citizens/consumers are living peacefully under the banner of the European Union – an event unprecedented in the history of our continent. Europe's leading role on the worldwide stage was also apparent with regard to the discussions of environmental issues spearheaded by European leaders, lending an added weight to the issue amongst the US administration. Europe's growing economy was apparent, above all, in the 2.9% growth rate in the 2007 gross domestic product, the marked decrease in unemployment numbers and the positive developments in consumer spending. Central Europe, in particular, can look forward to continued growth, as recently affirmed by numerous research institutes and think tanks.

Real estate as coveted currency on the international markets

The real estate industry has been particularly vibrant over the course of 2007, with an ever-increasing amount of cross-border investments. Real estate has become a very coveted commodity on the international exchanges and financial markets. While the "subprime" mortgage crisis caused by US banks has generated some global repercussions, the dominant role of the real estate market in international commerce shows no signs of changing.

500 GfK GeoMarketing location studies carried out in 2007

Amidst this context of growth, GfK GeoMarketing has rapidly expanded its European operations. Our home markets now extend to Poland, the Czech Republic, Hungary and Spain, among others. As a result of numerous completed location studies, GfK GeoMarketing has also garnered significant expertise in Portugal, Romania, Bulgaria, Turkey and Russia. Our three bases of operation – Hamburg, Nuremberg and Bruchsal – reported just under 500 location studies for 2007, a new company record!



Transactions amounting to 800 billion dollars

2007 saw record activity in the industrial and private real estate markets. Experts estimate that transactions on the worldwide real estate markets in 2007 amounted to a staggering 800 billion dollars. With 50 billion euros worth of investments in real estate, Germany places second in this market, coming in just behind the United Kingdom, but well in front of France and Spain.

GfK GeoMarketing is excited that, according to the latest forecasts and investors' reports, private real estate transactions are expected to bring in, Europe-wide, around 25 billion euros by the end of the year.

Find out more details at www.gfk-geomarketing.com/review.

Software training for RegioGraph and DISTRICT, Europe-wide

Two months after the release of the English-language versions of RegioGraph 10 and DISTRICT 10, GfK GeoMarketing's software support staff are implementing a new concept for their English-language courses.

In response to increasing demand from abroad generated by the recent release of English-language software versions, GfK GeoMarketing has developed a software training course that is tailored to the needs of an English-speaking audience. English-language courses are now available for interested users in all European countries. The first course organized according to this new concept took place in Great Britain in early January, and proved a resounding success.

The challenge in offering this new English-language course consists in tailoring each session to the unique needs and concerns of the participants, who come from a diverse range of countries, including Italy, the Netherlands, Belgium, France and Poland, in addition to Germany, of course.

Course registrants select the particular country-specific edition of RegioGraph or DISTRICT on which they'd like for the training course to be based. This allows the instructors to customize the course so that participants work with the very maps that they'll later use in their home companies. Instructors also

discuss the chosen country's unique postal code system and administrative districts.

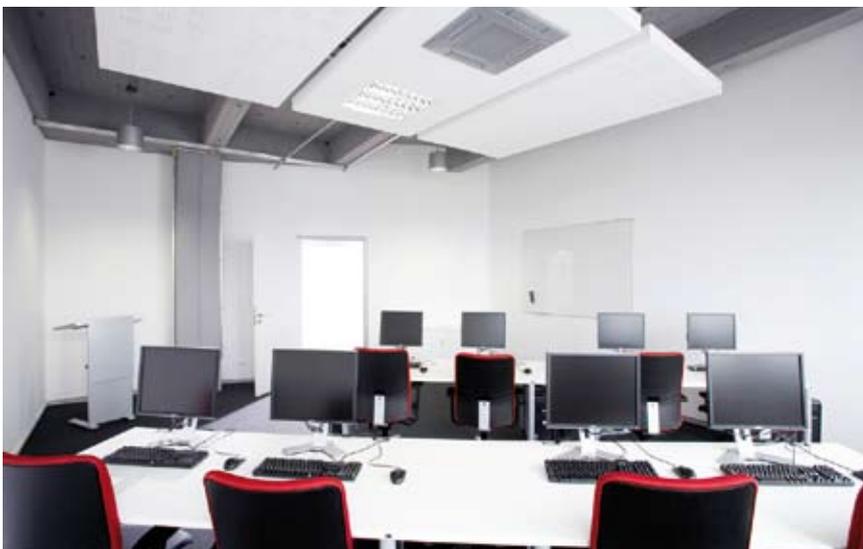
Here are the current course offerings for the new version 10:

- RegioGraph 10, beginners' course, 2 days, German
- RegioGraph 10 beginners' course, 2 days, English *New!*
- DISTRICT 10 beginners' course, 2 days, German
- DISTRICT 10 beginners' course, 2 days, English *New!*
- RegioGraph 10 advanced course, 1 day, German *New!*
- DISTRICT 10 advanced course, 1 day, German *New!*

Individual training/coaching sessions, English or German (by appointment)

Courses are delivered at the Bruchsal GfK GeoMarketing location, or, by arrangement, directly on-site at your company.

Questions about the training courses? Contact Doris Steffen at +49 (0)7251 9295180 or d.steffen@gfk-geomarketing.com.



Training dates:			
RegioGraph	February 28.-29.	March 10.-11.	March 17.-18.
DISTRICT	February 25.-26.	March 13.-14.	March 25.-26.
RegioGraph / DISTRICT Advance training	March 19.	April 23.	May 14.



GfK Purchasing Power Europe 2007/2008

- 40 countries (incl. Turkey)
- Data for all European postal code and administrative districts
- Rigorously researched and validated

Now with newly
compiled data!

**The ideal basis for making Europe-wide
strategic decisions!**

- Location and regional planning
- Expansion planning
- Controlling



For more information, call +49 (0) 72 51 92 95200 or
visit www.gfk-geomarketing.de/purchasing_power_europe.

GfK

GfK GeoMarketing

GfK GeoMarketing at trade fairs

You can visit GfK GeoMarketing this year at numerous trade fairs across Europe and take advantage of live presentations of our geomarketing solutions.



We recently presented our geomarketing products and services at the ITnT in Vienna in early February. The ITnT is a leading trade fair for the information technology and telecommunications sectors and draws professionals from across central, eastern and south-eastern Europe.



The GSMA Mobile World Congress in Barcelona from February 11-14, 2008 is the largest and most important trade fair for the mobile telecommunications industry. We'll be in Hall 7 together with GfK Marketing Services at Stand no. 7E58.



From March 4-9, 2008, we'll be at CeBIT, the world's largest trade fair for the information technology and telecommunications sectors. We'll be located at two stands – at the Microsoft Partner Stand in Hall 4, A26, P8, and in the Public Sector Park in Hall 9, C50.

Make an appointment for a presentation at www.gfk-geomarketing.com/fairs.

If have any questions, don't hesitate to ask!

Contact Nicole Lahr at +49 (0)7251 9295160 or n.lahr@gfk-geomarketing.com.

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New at www.gfk-geomarketing.com

The new GfK map webshop – order paper maps online

A variety of maps can now be purchased from GfK GeoMarketing in paper format, ideally suited for hanging on the wall in your office place. In partnership with Bacher Verlag, we've established a webshop where you can order these maps.

The webshop will open in late February at www.gfk.mapshop.info.

Would you like more information about the webshop and/or our selection of paper maps? If so, contact Alexandra Deutsch at +49 (0)7251 9295170 or a.deutsch@gfk-geomarketing.com.

New map samples from the 2007/2008 Europe Edition now available

Take a look at the high quality and fine craftsmanship of GfK GeoMarketing's worldwide digital maps. You can now download some free samples of maps from various countries. The samples are extracts from our most recent administrative and postal code map sets, and are available in .shp (ESRI), .tab (MapInfo) und PDF formats.

www.gfk-geomarketing.com/samples

GeoMarketing news and knowledge via e-mail: GfK GeoMarketing e-News

With GfK GeoMarketing e-News, you'll always know about the latest developments. Subscribe online to receive monthly updates via e-mail on the latest developments regarding maps, market data, location research and RegioGraph and DISTRICT. Subscribers receive a free map download each month as an added bonus!

To subscribe, visit

www.gfk-geomarketing.com/newsletter.

Prize drawing! RegioGraph 10

Correctly identify all of the tasks that RegioGraph 10 can perform, and, with a little luck, you could win a full-version of the new software program!

Place a checkmark in the boxes corresponding to the areas in which RegioGraph 10 can be used:

Sales	Marketing	Controlling
<input type="checkbox"/> Territory planning	<input type="checkbox"/> Media planning	<input type="checkbox"/> Company reports
<input type="checkbox"/> Employee briefing	<input type="checkbox"/> Company websites	<input type="checkbox"/> Portfolio analysis
<input type="checkbox"/> Expansion planning	<input type="checkbox"/> Defining distribution territories	<input type="checkbox"/> Defining benchmarks
<input type="checkbox"/> Location planning	<input type="checkbox"/> Presentations	<input type="checkbox"/> Monitoring success
<input type="checkbox"/> Monitoring the competition	<input type="checkbox"/> Reports / brochures	<input type="checkbox"/> Evaluating external sales staff
<input type="checkbox"/> Store-network optimization	<input type="checkbox"/> Target group localization	
<input type="checkbox"/> Determining realistic sales targets	<input type="checkbox"/> Direct marketing	

Photocopy this page, complete the address fields below and fax it to us at +49 (0) 72 51 92 95 290 by March 7, 2008. A small suggestion: Make a few extra copies for your colleagues to increase your company's chances of winning.

You can also take part in the contest via our online form at www.gfk-geomarketing.com/quiz.

The winning name will be drawn from all correct entries. Only one submission per person. All decisions are final.

Shared GeoMarketing Knowledge is Doubled GeoMarketing Knowledge!

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If so, why not send him a copy of his own!

Simply photocopy this page and fax the completed form to

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or complete the form online at www.gfk-geomarketing.com/form.



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First name

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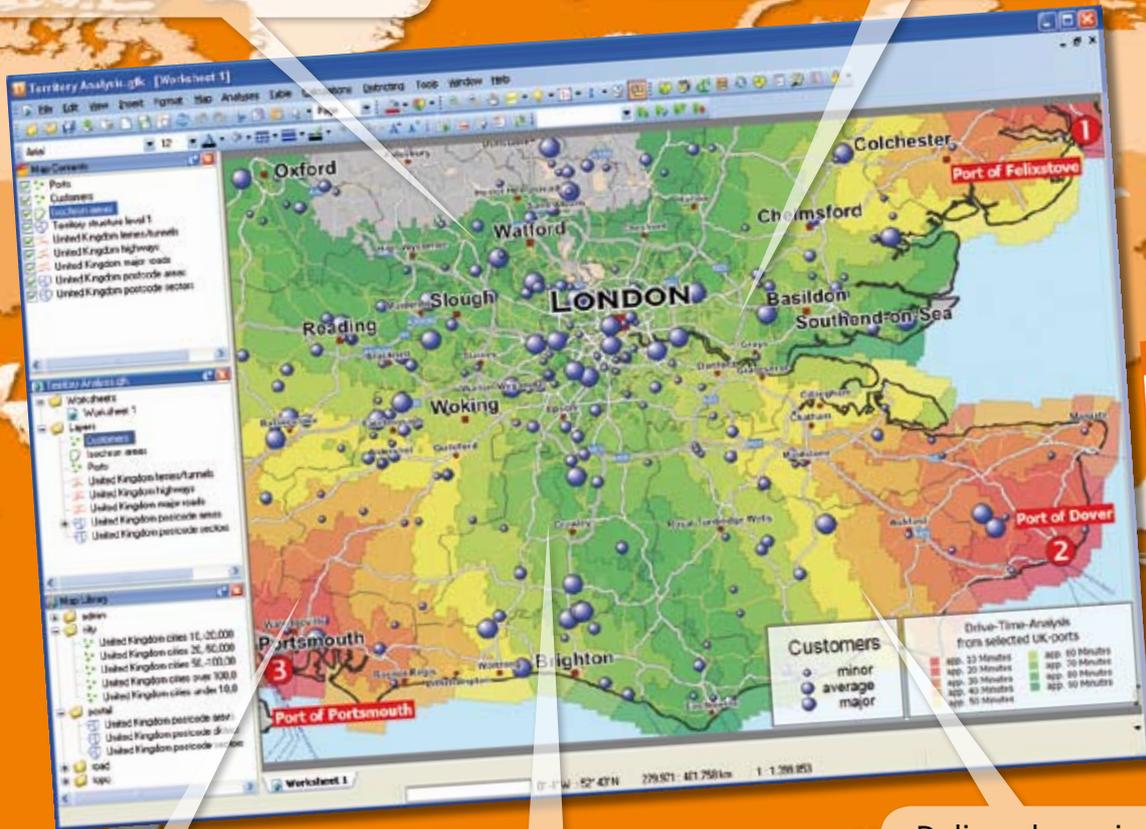
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D DISTRICT 10

Unbounded Possibilities

Visualize your customers' locations

Recognize market potential



Locate your target groups

Evaluate your sales territories

Deliver dynamic reports and presentations

D DISTRICT 10 – No.1 for sales territory planning!

- Software for regional market analyses and sales territory planning
- World-wide maps available
- Newly updated European purchasing power figures now available

English-language version now available!

DISTRICT 10 is available in both German- and English-language versions. It includes all postal code and administrative maps for a European country of your choosing. Maps of Germany, Austria and Switzerland include GfK purchasing power data for all postal code and administrative districts.