

GfK

GfK GeoMarketing

# News

01 | 2009

## RegioGraph 2009

New release just around the corner!



### Additional topics:

GfK Purchasing Power Germany 2009, GfK Demographics, user reports...

### Trade fairs

Meet us from March 3-8 at the CeBIT 2009 trade fair in Hannover. You'll find us at the Microsoft Partner Stand. Additional trade fairs listed on page 18.

### Free map inside

This issue's free map illustrates the 2009 distribution of purchasing power in Germany (GfK Purchasing Power Germany 2009).

# Welcome to GfK GeoMarketing News!



**Dear Readers,**

"May you live in interesting times" reads a well-known Chinese curse. Many of us no doubt long for the less eventful times of yesterday, in which our businesses ran according to plan, budgets were stable and annual targets could actually be realized. This past-oriented mindset is not very productive, though.

In the coming months, many companies will make decisions that will tremendously impact their future success and that of the economy more broadly. Questions abound, such as: Do we expand further? Are planned business locations financially feasible or is it necessary to close some existing branches? Do we need to adjust the size of our external sales force in order to cut costs? Or is it possible, through better planning, to increase the number of customer visits we can afford? Given a reduced marketing budget, how can we more efficiently manage our advertising distribution and increase responses?

An equally often-quoted saying is that "every crisis offers an opportunity." Crises create possibilities to discover more robust models, more efficient ways of working. Geomarketing is key to taking full advantage of the opportunities presented by these troubled times. GfK GeoMarketing provides products and services that help you reach solid answers to the many questions posed above. Our new flagship geomarketing software RegioGraph 2009 is particularly indispensable when it comes to making well-informed, low-risk business decisions.

Enjoy this edition of GfK GeoMarketing News, which is packed with inspiration and advice for embracing the coming challenges!

Wolfram Scholz  
Management Board member, GfK GeoMarketing

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# New at GfK GeoMarketing

## GfK GeoMarketing becomes a "Microsoft Gold Certified Partner"



ISV/Software Solutions

GfK GeoMarketing further distinguished itself recently by becoming a "Microsoft Gold Certified Partner". Thanks to our award-winning geomarketing solution RegioGraph, we are now among Germany's approximately 900 Gold Certified Partners. Microsoft has strict requirements for certification. The Gold Certification status is awarded only to partners whose IT products are efficient, high-quality, comprehensive and integrated solutions accompanied by long-term investment protection.

"GfK GeoMarketing's geomarketing software RegioGraph has been one of the industry leaders for years thanks to its innovative features and fluid compatibility with Microsoft's Office suite," explains Wolfram Scholz, management board member at GfK GeoMarketing. "As a result of these achievements, GfK GeoMarketing is again one of the few Microsoft partners with the honor of presenting its products and services at the official Microsoft partner stand in hall 4."

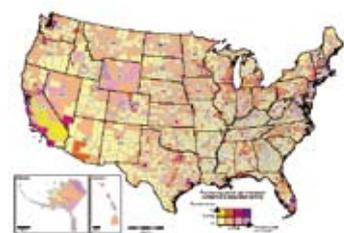
Visit GfK GeoMarketing at the Hanover-based CeBIT 2009 from March 3-8 at the Microsoft Partner Stand A26 in hall 4. Book an appointment at [www.gfk-geomarketing.com/cebit](http://www.gfk-geomarketing.com/cebit).

## New maps for Russia and numerous Asian countries

GfK GeoMarketing is currently updating its collection of digital maps for Asian countries. Many of these updates are now complete, including the maps sets for Singapore, Japan, Afghanistan, Malaysia and Indonesia. The Russia Map Edition has also been completely updated and digitized, containing, for the first time, a map of the country's two-digit postcode areas. The complete Asia Map Edition will be available in summer 2009.

More information on the Russia Map Edition can be found on page 16 or at [www.gfk-geomarketing.com/russia](http://www.gfk-geomarketing.com/russia).

## GfK Purchasing Power available for the first time for the USA and Canada



GfK GeoMarketing has released its first-ever comprehensive purchasing power data for the USA and Canada. Purchasing power data is provided in per inhabitant and per household values as well as in per mill and index values for US states, counties and 5-digit postcodes (ZIP codes) and for Canada's provinces and 3-digit postcodes.

GfK Purchasing Power 2009 for the US and Canada is available immediately. For more information, visit [www.gfk-geomarketing.com/purchasing\\_power](http://www.gfk-geomarketing.com/purchasing_power) or contact Alexandra Deutsch at +49 (0)7251 9295170 or [a.deutsch@gfk-geomarketing.com](mailto:a.deutsch@gfk-geomarketing.com).

### Job vacancies

GfK GeoMarketing continues to grow and is currently seeking to fill positions in sales, marketing and software development. Interested applicants can access job descriptions at [www.gfk-geomarketing.com/careers](http://www.gfk-geomarketing.com/careers).

## GfK POS Turnover for the Retail Trade 2009

The GfK POS Turnover for the Retail Trade dataset shows the regional distribution of retail turnover at the place of purchase, or point-of-sale (POS). GfK GeoMarketing published the new 2009 POS turnover figures for all regional administrative and postcode levels in Germany as part of the GfK POS Turnover for the Retail Trade 2009 dataset. This valuable dataset offers all companies active in the retail sector an objective benchmark for the evaluation of external sales team performance and assessment of turnover potential. The data also provide an excellent basis for location evaluation and expansion planning.

For more information, visit [www.gfk-geomarketing.com/pos\\_en](http://www.gfk-geomarketing.com/pos_en) or contact Sonja Scharf at +49 (0)7251 9295110 or [s.scharf@gfk-geomarketing.com](mailto:s.scharf@gfk-geomarketing.com).

## GfK Company Distributions and GfK Company Profiles 2008

The B2B GfK Company Profiles dataset provides valuable information on the regional distribution of businesses throughout Germany. Information on the regional distribution of companies in Germany's postcodes and municipalities is broken down into 14 business branches, 5 employee number categories and 5 turnover volume categories.

The microgeographic B2B GfK Company Distributions dataset goes one step further and organizes the data on Germany-based companies according to 14 business branches and 3 size categories down to the level of 3.6 million street segments. Both datasets give users the ability to determine areas of untapped potential, plan regional turnover goals, carry out more efficient direct marketing actions and objectively evaluate the performance of external sales teams.

For more information, visit [www.gfk-geomarketing.com/companies](http://www.gfk-geomarketing.com/companies) or contact Thorsten Lauszus at +49 (0)7251 9295145 or [t.lauszus@gfk-geomarketing.com](mailto:t.lauszus@gfk-geomarketing.com).

# RegioGraph 2009 – New release just around the corner!

We'll be presenting our brand-new geomarketing solution RegioGraph Planning at the CeBIT 2009 trade fair in Hannover, Germany. This product will replace the sales territory planning software DISTRICT. RegioGraph Analysis will replace the product previously referred to as RegioGraph.



We're delighted to unveil the new features of these soon-to-be-released software applications in this edition of GfK GeoMarketing News. The new version of RegioGraph will hit the market in March 2009 (The English version is scheduled for release in October 2009.). RegioGraph 2009 will offer users a wide array of new features such as a geocoder that associates data with maps, down to the street level!

But let's pause to commemorate the many positive associations conjured up by DISTRICT, the product that has brought our company and its users so much success since its initial release in 1991. DISTRICT has certainly served its purpose, but we now feel that the product name "RegioGraph Planning" better reflects the software's key purpose and the trajectory of its ongoing evolution.

"We are incredibly enthusiastic about the new RegioGraph Planning 2009!" says Doris Hardt-Beischl, head of sales at GfK GeoMarketing. "We're convinced that users will be very impressed."

Hardt-Beischl is eagerly awaiting the opportunity to present the new version of the award-winning geomarketing software to existing and potential customers at the upcoming CeBIT trade fair in Hannover. Until then, we are putting the finishing touches on the software and taking account of feedback by our beta testers, which has been very positive (see, for example, the interview with Hubert Bacher on page 6).

### Locate customers at the street level using the geocoder

Do you want to locate your customers living in city centers more precisely than was previously possible using postcodes? RegioGraph 2009 gives you the ability to locate and visualize your customers, sales representatives and branch locations down to street segments. An integrated import wizard even allows you to correct misspelled or falsely transcribed addresses in just a few simple steps. The import assistant also guides users through the process of importing street addresses, which appear on the map after completing some simple steps. And you can immediately find any address via the "Go to" option accessible on the menu bar, similar to the Google Maps interface.



### Simpler & faster operation, better results

The new "background maps" guarantee insightful and attention-getting results. These maps offer a standardized map view, whose formatting and attributions are always optimally adjusted for all zoom levels. As in the case of the layers that you can edit to suit your purposes, elements on these maps such as streets, cities, points of interest and topographic characteristics can be displayed and hidden. In short, you can now create better maps in a shorter amount of time. The overall operation and interface are also simpler and faster to use. The new getting started dialogue allows you to carry out a map analysis using your own company data in just four steps after launching the software.

"Our goal was to eliminate any anxiety among new users and show them how user-friendly and straightforward geomarketing can be with RegioGraph 2009," explains Hardt-Beischl. "Every single user of RegioGraph can produce insightful



analyses in just a few minutes. This is vital, since many business decisions must be made quickly. Users – from sales heads, who work with the software daily, to marketing heads, controlling staff and managers, who use the program to make important strategic decisions – should be able to navigate RegioGraph's environment with the same ease and confidence that characterize their use of the Microsoft Office applications. I am very confident that we have achieved this goal with RegioGraph 2009."

And this is only one of the various improvements that characterize the new version of RegioGraph. For example, thanks to a new data management and processing technique, the size of individual projects has been more than halved, reducing already rapid calculation times by an additional 20 percent.

### Enhanced sales territory planning with RegioGraph 2009

Use RegioGraph 2009 to create sales territories based on their accessibility from your business locations. While the ability to plan territories based on accessibility was already a highlight of the previous version, this feature has now evolved further. The new version of RegioGraph allows you to create a comprehensive sales network based on its accessibility (via existing transportation links) to your business locations. You can perform these same calculations for your external sales force regions at the mere click of a button in RegioGraph 2009. If one of your sales representatives leaves the team, RegioGraph 2009 can recommend how best to assign this representative's sales area to the team members responsible for adjacent regions. Also, when optimizing territories, the new RegioGraph 2009 allows you to take into account existing customer relationships. This means that when optimizing sales areas according to accessibility, key customer accounts will not be transferred to another sales representative. This keeps your sales force members happy and content, which, in turn, enhances your productivity. Of course, frequent pats on the shoulder are also helpful, but thankfully RegioGraph 2009 takes care of everything else!

### Plan catchment areas and estimate potential

Using RegioGraph 2009, you can create distance and time zones around your locations and integrate data on potential, such as number of inhabitants and purchasing power. This makes it easy to determine the potential in specific locations and identify any possible cannibalization effects. The new RegioGraph 2009 allows you to create your own user-defined territories from these calculated time and distance zones, further enhanc-

### Highlights of RegioGraph 2009

- Precise street-level localization of customers
- Expanded features for performing analyses, calculations and planning – down to the micro-level
- Calculate catchment areas
- Superb look thanks to automated map formatting
- Easier operation and faster results
- Unbeatable value for money with comprehensive user support

ing your expansion and branch network planning. For example, you can designate whether the zones should overlap and how they can best be adapted to your network of business locations. It's easy to then determine if you're losing customers, missing out on opportunities, competing against yourself in certain areas or losing ground to a competitor. The distance and time zone calculation feature of the new RegioGraph thus has many advantages, including a simplified and enhanced isochrone calculation option. The arrival of the new and improved RegioGraph is timely: These difficult economic times require adjustments, which the software's expanded features can help you implement quickly and efficiently, strategically positioning your company to maximize profits and minimize expenditures.



## Your partner for territory planning

*"Sales territory planning ensures the optimal supply of your market with sales and services."*

Michael Büttcher, Senior Consultant at GfK GeoMarketing

**Make your territory planning a huge success with the expertise of our consultants!**

- Analyze and visualize your sales data
- Develop and compare alternative sales territory planning scenarios
- Get advice on how best to implement your new sales strategy

For more information on GfK GeoMarketing's consulting services, please call: +49(0)7251 9295 200.





## The editor: Customize maps and anchor images with precision

Many companies have operations that extend across multiple national boundaries. Using the new map editor, you can quickly and easily create a single map of your boundary-crossing sales areas that includes all of the associated data. The editor lets you edit and customize all map objects, even allowing you to combine and split elements. Use this powerful and flexible feature to create maps tailored to your individual needs. Become a modern-day cartographer by using the editor to digitize satellite imagery. Simply incorporate the desired image as an object and anchor it to your digital map using the editor's alignment feature. You can also georeference any point(s) on your map.

Thanks to RegioGraph's increased speed, you'll have more time to add eye-catching touches to your maps. For example, make a great impression at your next presentation by incorporating a georeferenced aerial photo of the company headquarters into your map.

## Includes all street maps and 2009 maps for Germany, Austria and Switzerland as well as selected GfK purchasing power data\*

RegioGraph 2009 includes all Tele Atlas street maps for Germany, Austria and Switzerland as well as all administrative, postcode and topographic maps. These maps allow you to orient yourself more precisely and provide an even better cartographic basis for accessibility calculations. Also included is 2009 data on inhabitants and households as well as GfK purchasing power data.

RegioGraph 2009 provides the most up-to-date cartographic basis and gives you everything you need for the precise analysis and illustration of your customers, target groups and potential. This would be reason enough to upgrade to the new version, but remember that there are many other advantages: precise street-level visualizations, expanded territory planning features – including time- and distance-zone calculations, increased speed, and an easier-to-use interface. Other great new features include the ability to export PDF-format reports, create a slideshow from bookmarked map extracts and the option to save spatial and table queries.

RegioGraph 2009 gives you everything you need to weather these difficult economic times by making the best possible sales, marketing, controlling and expansion decisions. The software delivers the trademark GfK quality that so many users worldwide have come to trust at an unbeatable value for money!

The eagerly-awaited RegioGraph 2009 will be available at the beginning of March! We're excited about presenting the software's new features live at this year's CeBIT trade fair in early March!

Book an appointment for a presentation at [www.gfk-geomarketing.com/cebit/](http://www.gfk-geomarketing.com/cebit/)! For additional information on the new RegioGraph, visit [www.gfk-regiograph.com](http://www.gfk-regiograph.com). To pre-order a copy of the new RegioGraph, call +49 (0)7251 9295200.

*\*The English version of RegioGraph will be released in October 2009 and will also include complimentary maps and data – more details to follow later.*

## Interview with Hubert Bacher, head of Bacher Verlag and a beta tester for RegioGraph 2009

### Mr. Bacher, what do you think of the new version of RegioGraph?

*I'm thrilled! Version 10 was already a quantum leap forward, but RegioGraph 2009 is truly amazing, especially thanks to its ability to carry out street-specific searches and localizations. Also, the smaller projects sizes make things a lot easier for us!*

### How did you find the transition from version 10 to the new RegioGraph?

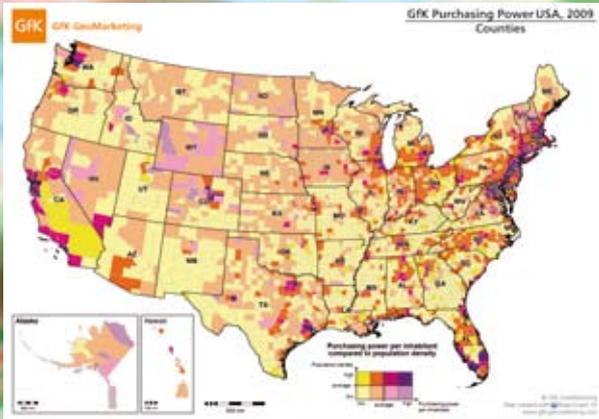
*Despite its many new additions, we didn't have any problems adjusting to the new software. The user interface continues to be very intuitive and straightforward. The new functions are very easy to find and use despite their complexity. Incidentally, this was also the impression of a new colleague who had no previous experience with RegioGraph.*

### What's your favorite new addition to RegioGraph?

*We produce a tremendous number of customized maps for our customers, often under great time pressure. Every map has to be perfect. RegioGraph 2009's inclusion of pre-formatted background maps with optimized layouts has helped us tremendously in this regard. Thanks to this addition, we've been able to reduce the time required to produce each map by almost 20%!*

### Many thanks for sharing your impressions and we wish you continued success!

# Plan and carry out your expansion with confidence



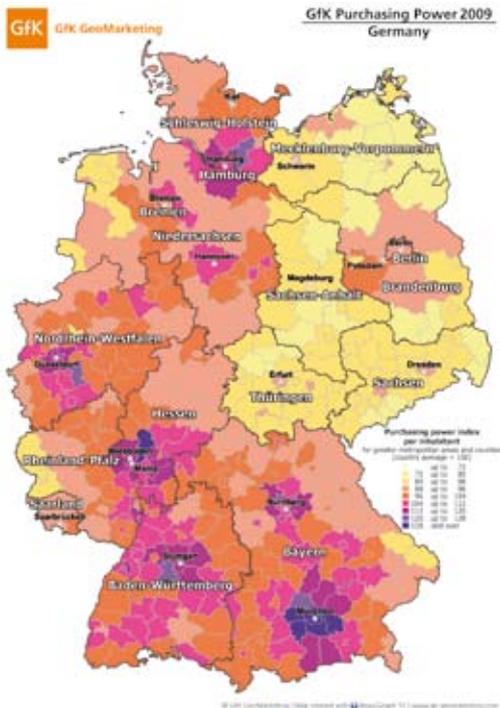
Worldwide  market data and  digital maps for your expansion analysis and planning!

- Worldwide vector-based maps of municipalities, postcodes and other locations
- Europe-wide data on potential and GfK purchasing power data for North America
- Regular updates and perfectly fitting maps and data

Free map and purchasing power data samples at [www.gfk-geomarketing.com](http://www.gfk-geomarketing.com)  
For more information, call +49 (0)7251 9295200.

# More success for B2C companies: GfK Purchasing Power reveals turnover potential

After years of steady increases, purchasing power growth will stagnate amidst the economically turbulent climate of 2009. GfK purchasing power data is therefore more valuable than ever, allowing companies in the B2C sector to discover and actualize potential.



Companies who sell to end consumers face some major challenges: a massive global economic downturn, rises in unemployment and looming recessions, to name but a few. employment and an economic recovery plan recently passed by the German government to ward off recession, companies who sell to end consumers face some daunting challenges. Given these developments, how can you ensure that you achieve your 2009 turnover goals? Are there regions in which you haven't fully exploited your potential? Which areas are not being adequately covered by marketing and sales activities? What are realistic turnover targets for external sales team members? Now is the time to make the necessary adjustments to ensure that all of your 2009 turnover goals for the B2C market are met. A geomarketing approach provides confidence and security amidst uncertain times, allowing companies to meet these challenges successfully. Why

does this approach succeed when so many others fail? Because it provides concrete answers to the many "where" questions intrinsic to sales and marketing endeavors. GfK Purchasing Power 2009 is a powerful and objective planning tool for marketing, sales and controlling divisions as well as management.

## Market overview: Purchasing power as an indicator of consumer potential

A given region's purchasing power, or consumer potential, is the most important factor for companies who sell to end consumers. The purchasing power dataset reveals how much disposable income the inhabitants of municipalities, counties, greater metropolitan areas and postcode regions have available for consumer-related purchases. As such, the GfK Purchasing Power dataset is one of the most important indicators of the economic might of a given region and its potential lucrativeness. By knowing the precise purchasing power of a given area, companies can make better strategic and operational decisions when it comes to sales territory planning, location analysis, sales controlling and advertising initiatives. By using these figures in conjunction with their own turnover data, companies can determine where they are not taking advantage of their full potential and adjust their marketing and sales activities accordingly. Purchasing power data also provide an objective and precise basis for evaluating the performance of external sales teams and setting realistic turnover goals. The purchasing power data also support your microgeographic marketing, sales and location activities, with information on 2.5 million street segments in Germany.

## Challenges ahead: Purchasing power growth expected to stagnate in 2009

The GfK has been calculating purchasing power since 1937, making GfK Purchasing Power the company's oldest and best-known market dataset. GfK Purchasing Power provides a beginning-of-the-year prognosis of the expected regional consumer potential for the coming year. GfK GeoMarketing's market data experts predict that German consumers will have around 1,558 billion euros at their disposal in 2009. This figure corresponds to the available net income of the population in that region and also takes into account income earned from capital gains and state subsidies such as unemployment assistance, child benefit and pension contributions. According to these calculations, the average per person purchasing power in Germany equates to 18,946 euros in 2009. This amounts to around 210 euros more per person

Ranking 2009	Urban /rural district	Purchasing power per inhabitant in 2009
1	Hochtaunus	€ 27,590
2	Starnberg	€ 27,413
3	Munich (rural district)	€ 26,232
4	Main-Taunus	€ 26,230
5	City of Munich	€ 25,921
6	Ebersberg	€ 25,359
7	Fürstenfeldbruck	€ 24,342
8	City of Erlangen	€ 23,820
9	Stormarn	€ 23,525
10	Dachau	€ 23,451
11	Rheinisch-Bergisch	€ 23,208
12	Böblingen	€ 23,058
13	Harburg	€ 22,722
14	City of Düsseldorf	€ 22,697
15	Esslingen	€ 22,697

Table 1: The 15 urban/rural districts with the highest purchasing power in Germany

# GfK Retail & Real Estate Conference '09

Retail and consumption: A perspective in uncertain times



## GfK GeoMarketing's networking and conference event Take part in a discussion of the future of retail in Europe.

- When and where? May 15, 2009, Hotel Hafen Hamburg
- Who? Key players from the retail, public authority, real estate development and investment sectors
- What? Wide-ranging presentations and panel discussions on retail and consumption in Europe

For additional information and to register, call +49 (0)40 2271120 or visit [www.gfk-geomarketing.com/conference](http://www.gfk-geomarketing.com/conference).

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compared to last year's average, an increase of approximately 1.1 percent. However, this growth in private income is predicted to be offset by inflation.

"As a result of the rising costs of living, average inflation-adjusted purchasing power levels are expected to stagnate in the coming year," explains Simone Baecker-Neuchl, head of GfK GeoMarketing's Market Data & Research division and project leader of the purchasing power study. "Much hinges on how the employment market and the current financial crisis play out over the coming year. At the end of the day, how individuals manage in this period will depend upon whether they work in sectors with rising wages or, conversely, must cope with the challenges of temporary work or even unemployment."

## Seize opportunities by better exploiting existing purchasing power

It's not possible to predict how the German population will spend its purchasing power in 2009. Traditionally, around a third of the population's available income goes toward retail purchases, which include everything from essential items for daily use (e.g., groceries) to home improvement items and toys for children. The remaining two-thirds of disposable income go toward monthly fixed costs such as rent, energy/heating costs, retirement funds, insurance policies, vacations and transportation.

To succeed in today's challenging economic climate, companies must take advantage of every opportunity to capitalize on the existing purchasing power in their target markets. For example, this can be done by concentrating direct marketing actions in particularly promising areas and optimizing sales territories based on the regional distribution of purchasing power. Frequently, it pays to seek the advice and support of a geomarketing consultants. Thanks to their specialty knowledge and many years of experience with geomarketing, they can give companies customized advice that takes into account their unique goals and situation. GfK GeoMarketing offers a comprehensive range of consultancy services for all areas of geomarketing, such as sales territory planning, location assessment and market analysis.

*GfK Purchasing Power Germany 2009 is calculated for all German counties, greater metropolitan areas, municipalities, postcodes and 2.5 million street segments.*

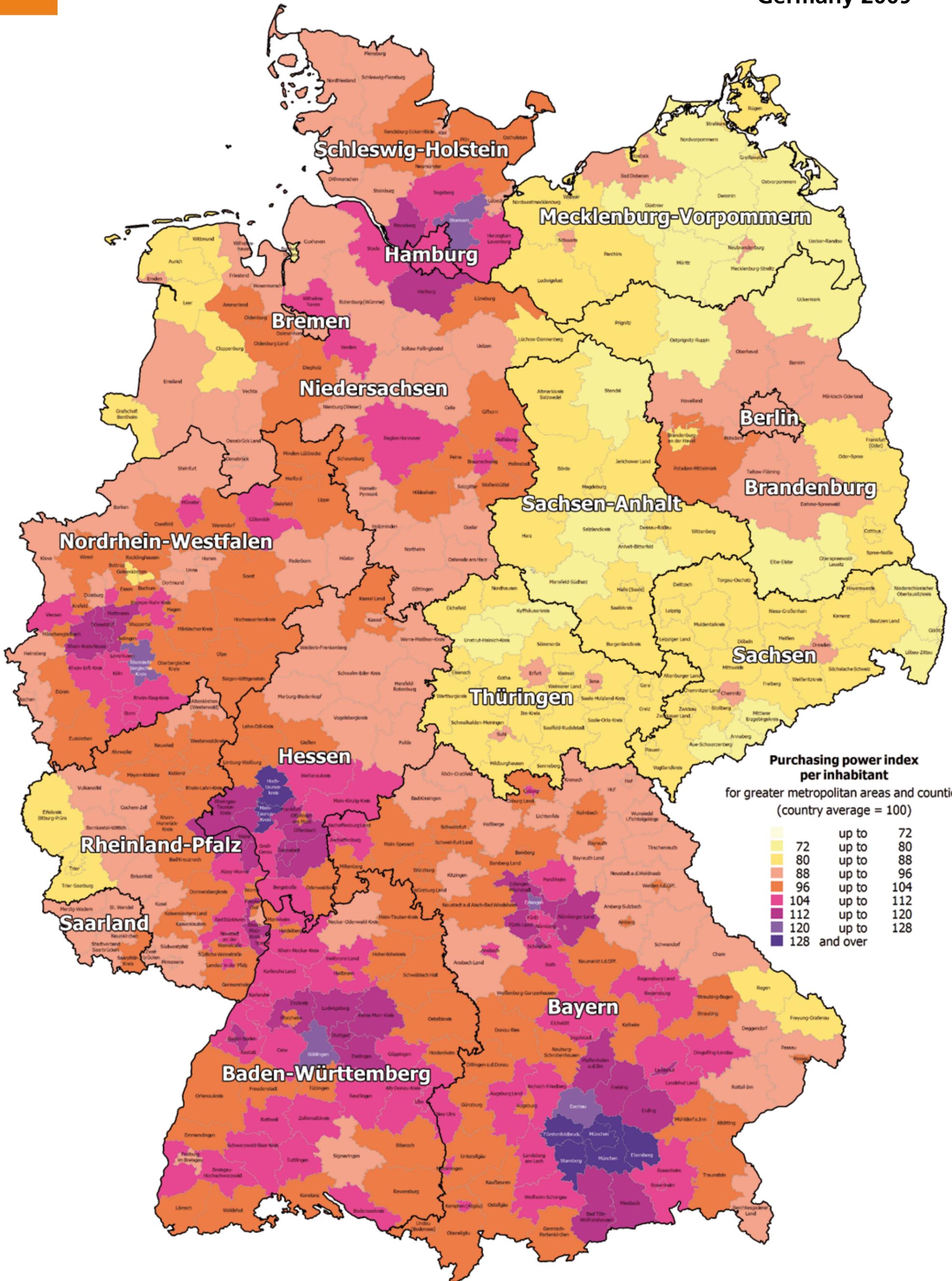
*If you have any questions, please contact Alexandra Deutsch at +49 (0)7251 9295170 or [a.deutsch@gfk-geomarketing.com](mailto:a.deutsch@gfk-geomarketing.com).*

## What is GfK Purchasing Power?

GfK Purchasing Power reveals the net income of the population by region – not the rate of inflation or cost of living. GfK Purchasing Power is defined as the sum of the net income of the population according to place of residence. These purchasing power figures take into account income related to self- and non-self employment as well as capital gains and government subsidies, such as unemployment assistance, child benefit and pension payments. Not included in these calculations are expenditures related to living expenses, insurance, rent and associated costs for electricity and/or gas, clothing and savings plans. Consequently, a nominal increase in purchasing power levels does not necessarily equate to an increase in actual funds available, should, for example, increases in the above-listed expenditures exceed the additional disposable income. Also important to remember is that the purchasing power level of a given region represents an average value for the population. As such, these figures indicate neither the relative wealth of individual citizens or households nor the extent of the divide between "rich" and "poor" within the given region.

Ranking 2009	Federal state	Purchasing power per inhabitant in 2009	Purchasing power index per inhabitant (Federal average = 100)
1	Bavaria	€ 20,571	108.6
2	Hesse	€ 20,424	107.8
3	Baden-Württemberg	€ 20,283	107.1
4	Hamburg	€ 20,139	106.3
5	North Rhine Westphalia	€ 19,234	101.5
6	Schleswig-Holstein	€ 19,214	101.4
7	Rhineland Palatinate	€ 18,956	100.1
8	Lower Saxony	€ 18,537	97.8
9	Saarland	€ 17,729	93.6
10	Bremen	€ 17,408	91.9
11	Berlin	€ 16,977	89.6
12	Brandenburg	€ 16,645	87.9
13	Saxony	€ 15,952	84.2
14	Thuringia	€ 15,826	83.5
15	Mecklenburg-Western Pomerania	€ 15,552	82.1
16	Saxony-Anhalt	€ 15,548	82.1

Table 2: Federal states' ranking



**Purchasing power index per inhabitant**  
for greater metropolitan areas and counties  
(country average = 100)

Lightest yellow	up to 72
Light yellow	up to 80
Yellow	up to 88
Light orange	up to 96
Orange	up to 104
Dark orange	up to 112
Red-orange	up to 120
Red	up to 128
Dark red	and over

# Bookmark map sections

RegioGraph's bookmark feature can increase the speed and efficiency with which you use the software. In addition to various zoom and display options, the new RegioGraph allows you to bookmark map sections for quick access later.

## Place a bookmark

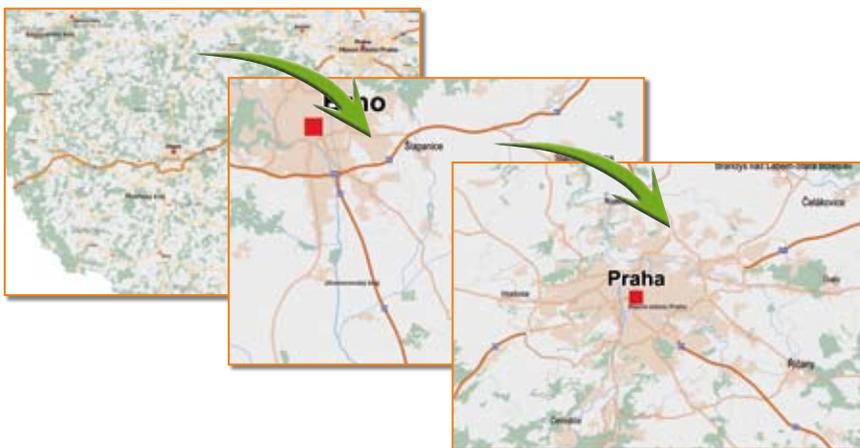


To bookmark the visible map extract on your worksheet, click on **Map** and then **Bookmarks** in the menu bar, followed by **Add bookmark** from the submenu. Give the bookmark a name and then click **OK**.

## Access a bookmark

You can instantly return to the bookmarked map section at any later point. To do this, select **Map** and then **Bookmarks**. Next, select your saved bookmark from the drop-down menu adjacent to the **Go to** field.

Use this technique to create additional bookmarks and quickly access them at any time. Just one example of how you can use this feature: Bookmark close-up map sections of your company locations.



## Browse existing bookmarks

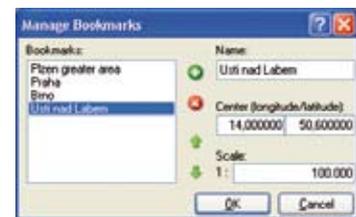


It's easy to browse through your saved bookmarks. Simply select **Previous / Next Bookmark** from the **Map-> Bookmarks** sub-menu. An even easier option is to click on the corresponding icons in the **toolbar** across the top of your screen. The toolbar gives you one-click access to all bookmark commands.

Additional RegioGraph tutorials (some of which are available in video format) can be found at [www.gfk-geomarketing.com/tutorials\\_en](http://www.gfk-geomarketing.com/tutorials_en).

## Additional bookmark options

The **Manage Bookmarks** feature gives you additional options. From this menu you can erase existing bookmarks or organize them in a particular sequence.



Sometimes it's useful or even necessary to produce a map section by providing the precise coordinates for the desired center point and dimensions for the scale. To do this, select **Manage Bookmarks** and then enter values for the following fields:

- Name**
- Center (longitude/latitude) and Scale**

When finished, click **OK**. Bookmarks created in this way can be accessed later in the manner already outlined.

## Creating a slideshow from bookmarks

RegioGraph has a **full-screen slideshow** option that allows you to browse any bookmarked map extracts.

From the **Slide Shows** option in the **File** menu, create a presentation that includes the worksheet containing the saved bookmarks. Start the slideshow.

When the worksheet with which the bookmarks are associated appears, access the bookmarks by right clicking.

# Top earners, singles, parents: Locate your key German target groups

Where in Germany are local marketing campaigns likely to produce the greatest response?

The new GfK Demographics 2008 facilitates target group-oriented marketing.

The demands on marketing divisions are particularly high in times of reduced marketing budgets and economic instability. Whether mailings, billboards or radio spots, all marketing actions have to generate the maximum possible response with the least possible expenditure in order to support sales efforts. Which regions in Germany should be targeted with these limited means and where can the desired target groups be reached most effectively? What is the total potential profit obtainable from a particular target group and where is this potential not being fully exploited?

Answers to these kinds of place-related questions are offered by region-specific market data such as the new GfK Demographics dataset. This dataset provides statistics on a given region's population, including information on age, income, housing and household profiles. For example, the detailed market information contained in this dataset allows you to identify regions with an above average number of households with net incomes greater than 2,000 euros or pinpoint areas with high concentrations of 1-2 family houses. GfK Demographics provides optimal support for targeted marketing actions, giving users access to detailed market information on Germany's municipalities, postcodes and 2.5 million street segments. Only this level of detail allows marketing divisions to concretely determine the exact locations in which the desired target groups reside. As a result, market operations can be carried out more precisely and efficiently, which saves time and money. Here's an overview of some insights that can be drawn from the GfK Demographics 2008 dataset.

### Household profiles: Berlin is number 1 for singles

Berlin's population is characterized by an above average number of single-person households. While only 38 percent of Germany's households are classified as single-person, 52.4 percent of Berlin's inhabitants live in single-person households. Hamburg and Bremen closely follow Berlin, with almost 50 percent and 48 percent respectively. More rural areas tend to have significantly fewer single-person households. For example, the share of single-person households in the county of Borken is 23 percent below the national average. One among many marketing-related insights that can be drawn from this demographic information is the fact that advertising for dating websites or grocery items sold in individual-portion packages is more likely to be effective in urban rather than rural areas.

### Population age profile: Percentage of senior citizens on the rise

The GfK Demographics dataset also reveals that the average age of household heads in Germany continues to rise and currently stands at 48.4 years.

"The rise in the average age of household heads reflects a nationwide demographic trend in Germany," explains Simone Baecker-Neuchl, head of the Market Data & Research division at GfK GeoMarketing. "The percentage of retirement-age citizens has been slowly but continually increasing for years. This trend affects the nation's average household profile."

All signs suggest that this trend will continue. Households with children already constitute a mere 31.2 percent of German households. By way of comparison,

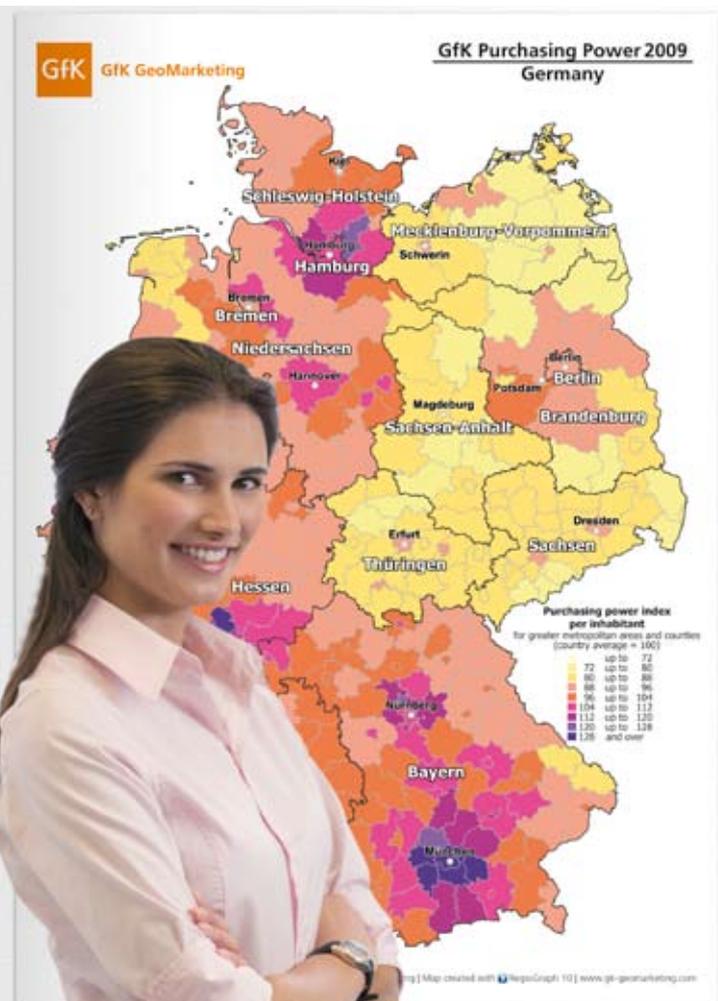
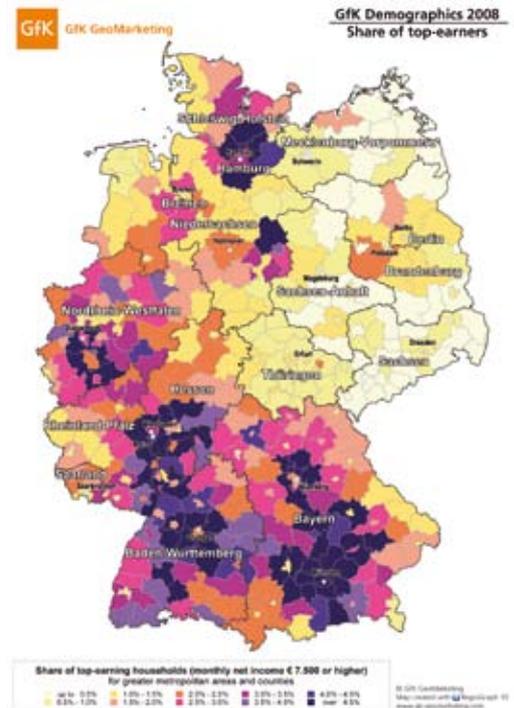


multiple-person households without children amount to 30.6 percent. The GfK dataset divides the ages of household heads into 5 categories and provides an overview of the type of accommodation prevalent in a given region. The latter information is also very useful. For example, companies who sell garden products can target their advertising in regions with an above-average number of 1-2 family houses. Residents of these types of accommodation are far more likely to have gardens, and therefore a greater interest in garden products than would be the case among residents of high-rise apartments. With this knowledge, companies offering these products can target their mailing and brochure distributions accordingly.

## Income distribution: Large concentration of high earners in southern Germany

A particularly attractive target group are the nation's top earners with net monthly household incomes greater than €7,500. Statistics on this income group are included for the first time in this year's dataset. GfK Demographics dataset. Members of this affluent group are mostly concentrated in the southern federal states of Bavaria and Baden-Württemberg, as well as in the urban communities clustered around large cities such as Bonn, Cologne, Düsseldorf and Hamburg. The largest share of top earners is located in the high purchasing power regions around Munich (Starnberg and Munich counties) and Frankfurt (Hochtaunuskreis, Main-Taunus-Kreis). Up to 15 percent of all households in these areas fall into the top-earning category, compared to only 2.6 percent nationwide. As a supplement to GfK Purchasing Power, which shows the average per-person disposable income according to region, the seven income brackets included as part of the GfK Demographics 2008 dataset reveals the distribution of income by region, allowing companies to identify the number of poor and wealthy households in a given area.

*GfK Demographics 2008 is ideal for target group-oriented marketing. The included data provide up-to-date information on the demographic characteristics of Germany's administrative regions, postcode areas and street segments. Questions? Feel free to contact Sonja Scharf at +49 (0)7251 9295110 or [s.scharf@gfk-geomarketing.com](mailto:s.scharf@gfk-geomarketing.com).*



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# RegioGraph for transportation logistics

RegioGraph is successfully used as a visualization instrument for the optimization and simulation of transport networks. A user report from V-Research and the Austria-based logistics company Gebrüder Weiss shows how.



Gebrüder Weiss is Austria's largest privately owned shipping and logistics company. The services offered by this international transport and logistics company encompass logistics solutions, warehousing, consultancy, IT solutions as well as land, sea and air cargo.

The planning and optimization of transport networks constitute quite a challenge given the global reach of Gebrüder Weiss' services. The checking of transport structures and processes is a daily aspect of the company's operations. Reasons for new evaluations of the existing transport network include, among others:

- a new development in the transport network,
- a modification in the structure of the transport network to be analyzed,
- the take-over of an existing network and its integration into the company's broader structures.

Gebrüder Weiss developed a software platform in collaboration with V-Research, a Vorarlberg-based independent center for industrial research and development. The software allowed the company to evaluate and simulate various strategic questions and scenarios as a means of simplifying decision-making processes.

A key aspect of the software is the visualization of data with the help of RegioGraph. RegioGraph runs in the background of the main application and delivers fully automated maps that illustrate the relevant data. The basis for the association of the company data with the maps is GfK GeoMarketing's postcode data. With the click of a button, data is imported into RegioGraph and then associated with the relevant postcodes so that additional calculations and analyses can be carried out within RegioGraph. The resulting maps are then created, formatted and exported back into the main application. Naturally, all of the RegioGraph map projects can be accessed later for further editing.

In this manner, information on existing locations, main avenues of transport and expected shipping volumes can be made transparent by visualizing it on high-quality digital maps. Any actual or anticipated changes to the structure of the existing transport network can be simulated, compared and illustrated on maps.

The high quality of the data included in GfK GeoMarketing's software solution RegioGraph plays a decisive role in ensuring that all such analyses and simulations are accurately associated with and visualized on the maps. RegioGraph's programming interface for Microsoft's .NET technology ensures a fluid interaction between the simulation software and RegioGraph.

V-Research is currently developing software functions that allow users to visualize logistics networks that span multiple national boundaries as well as maps in the area of delivery service logistics.

Author: Rainer Frick, V-Research, in collaboration with Gebrüder Weiss



V-Research specializes in new technologies, creative ideas and technical innovations. V-Research promotes the success of its clients by offering innovative products and processes.

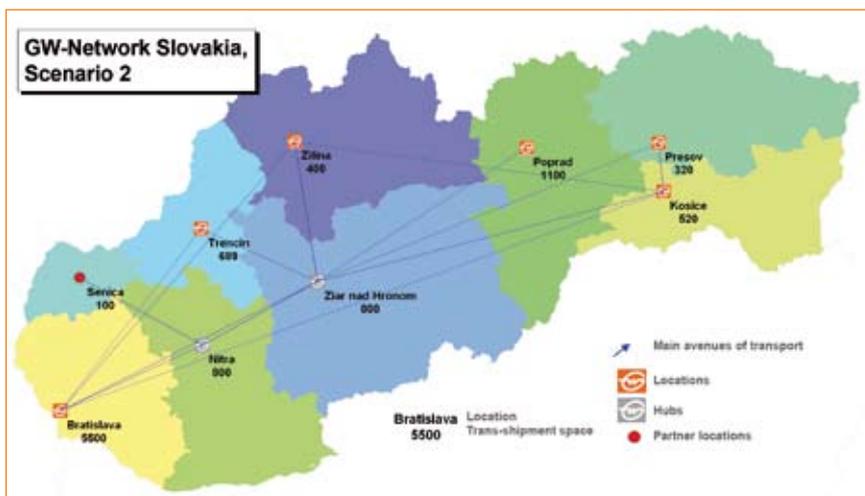


Illustration: An example of a RegioGraph map generated as part of a simulated study on Slovakia.

# Flexible in a dynamic market: Festo uses RegioGraph to optimize external sales force

**Festo, a supplier of pneumatic and electrical automation technology, uses RegioGraph to evaluate numerous external sales force variables: The company uses the RegioGraph add-on "VarioPlan" to create and optimize sales areas while preserving existing relationships with key customers.**

As one of world's leading suppliers of pneumatic and electrical automation technologies, Festo AG offers more than 28,000 products as well as customer-tailored solutions and ready-for-installation automated systems. These many offerings along with its reputed customer service make Festo very popular. Festo's head office is located in the town of Esslingen-Berkheim in southern Germany. From this location, the activities of more than 140 external sales force members in 13 sales areas across Germany are evaluated and optimized.

Excellent customer service is a top priority for the company. This entails offering customers long-term, reliable contact with a trusted sales representative, while, at the same time, ensuring that the company remains flexible amidst the many changes of a dynamic market. Festo uses the RegioGraph add-on VarioPlan in order to adhere to both of these company principles. VarioPlan makes it possible to differentiate between "standard" and "special" customers in order to ensure that the latter are not affected by sales territory restructurings. The affects of any planned changes can be illustrated on the maps in real time. This is true not just for the experienced RegioGraph user, but also for regional sales heads who, during a visit to the head office, wish to have a quick glimpse at the current sales territory planning activities.

VarioPlan was developed by Zim-Tec, a long-standing business partner of GfK GeoMarketing that specializes in providing client-centered programming solutions for RegioGraph. Zim-Tec developed the add-on based on its recognition of the fact that many companies – such as Festo – have unique needs and goals concerning the organization and optimization of customer-sales representative assignments. There's the typical case of a sales representative being assigned to a specific region. Another possibility is for a sales force member to be assigned key account customers who are spread out over various sales territories. Finally, some combination of these two

types is sometimes necessary. In these cases, a sales representative has an assigned territory, but also specific key customers located in other areas (who remain assigned to the representative in question for the purpose of maintaining continuity or due to the representative's specialty knowledge of a certain product area). VarioPlan makes it possible to balance these sometimes competing aims in the area of customer-sales representative assignments and optimizations.

It's very easy to make adjustments to the status of existing customer assignments by using VarioPlan in conjunction with RegioGraph. A status window provides an overview of the currently highlighted objects on the map. The sums of the numerical columns in the associated RegioGraph table are listed next to the number of highlighted objects. This makes it possible to immediately identify the impact of any changes on key statistics, such as turnover or the frequency with which a sales force member can visit a given customer.

Harald Glaser, head of Festo's external sales force management for Germany, regards VarioPlan and RegioGraph as an indispensable combination: "The overview visualization feature and immediate representation of the effect of any changes on things like turnover and visitation frequency make VarioPlan an incredibly powerful planning tool. Thanks to VarioPlan and RegioGraph, we can carry out detailed analyses of our sales structures, react quickly to any changes and maintain our high customer service standards."

*For more information on VarioPlan and Zim-Tec's programming services, visit [www.gfk-geomarketing.com/varioplan](http://www.gfk-geomarketing.com/varioplan).*



Flexible Gebietsplanung mit RegioGraph VarioPlan.

## New maps of Russia: An ideal basis for expansion planning

Russia's numerous opportunities for growth make it an attractive option for companies looking to expand. GfK GeoMarketing's newly updated maps of this vast country provide a valuable basis for planning.

How many 2-digit postcodes are there in Russia and where are their boundaries? Where is the city of Kazan located and what are some good catchment area possibilities for this area? What is the distribution of cities with good expansion opportunities and how should sales territories best be structured? Finding answers to these kinds of place-related questions is the first and most crucial factor behind a successful expansion into a new market.

GfK GeoMarketing's new Russia Map Edition offers a reliable planning foundation for expanding into this dynamic and vast market. These newly digitized maps illustrate the country's administrative levels (federal districts, districts and federation provinces), postcodes, cities, streets, rivers and topographic features. The maps are ready for incorporation into a geomarketing software application such as RegioGraph or the GIS applications of ESRI and MapInfo. In conjunction with RegioGraph, users can import and visualize customer locations based on postcode data, calculate catchment areas according to potential, plan sales territories and create eye-catching maps for presentations. In just seconds, companies can install the maps on their systems and start their expansion planning and analysis.

The new maps for Russia have been completely re-digitized and updated to reflect the 2008 status by GfK GeoMarketing's in-house team of cartographers. The map edition includes a map of Russia's 2-digit postcodes for the first time. The available administrative maps are subdivided into maps of Russia's seven federal districts, 80 regions and 2,532 districts. Russia is characterized by numerous unique cartographic features. Along with China, Russia boasts the most number of neighboring countries (14). The Volga River – Europe's longest – courses through the country along with numerous major mountain ranges such as the Caucasus and Ural Mountains. The highlight of the topographic maps is the depiction of more than 108,000 cit-

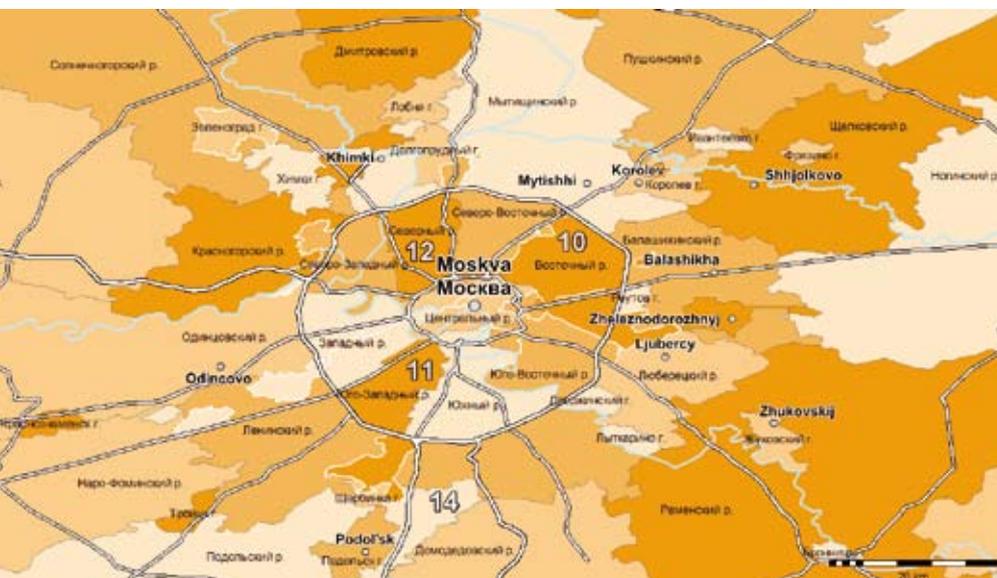
ies, giving users a detailed overview of their geographic distribution. The cities have been subdivided into six categories according to number of inhabitants. The layers illustrating the country's administrative regions and cities include both Cyrillic and international place-name attributions.

GfK GeoMarketing's in-house \*.lay format of the Russia Map Edition includes additional integrated Tele Atlas streets along with the associated infrastructure data. This additional data means that natural boundaries such as rivers and mountains can be taken into account when planning sales or service territories with RegioGraph. The data also make it possible to calculate drive-time zones around company locations.

The Russia Map Edition is one among a series of GfK GeoMarketing's comprehensive and newly updated map editions for Asian countries. In summer 2009, GfK GeoMarketing will release updated postcode, administrative and topographic maps for all Asian countries. Many of the updated map editions for Asian countries are already available, including those for Singapore, Indonesia, Malaysia and Taiwan. GfK GeoMarketing's map experts are happy to assist you with any questions.

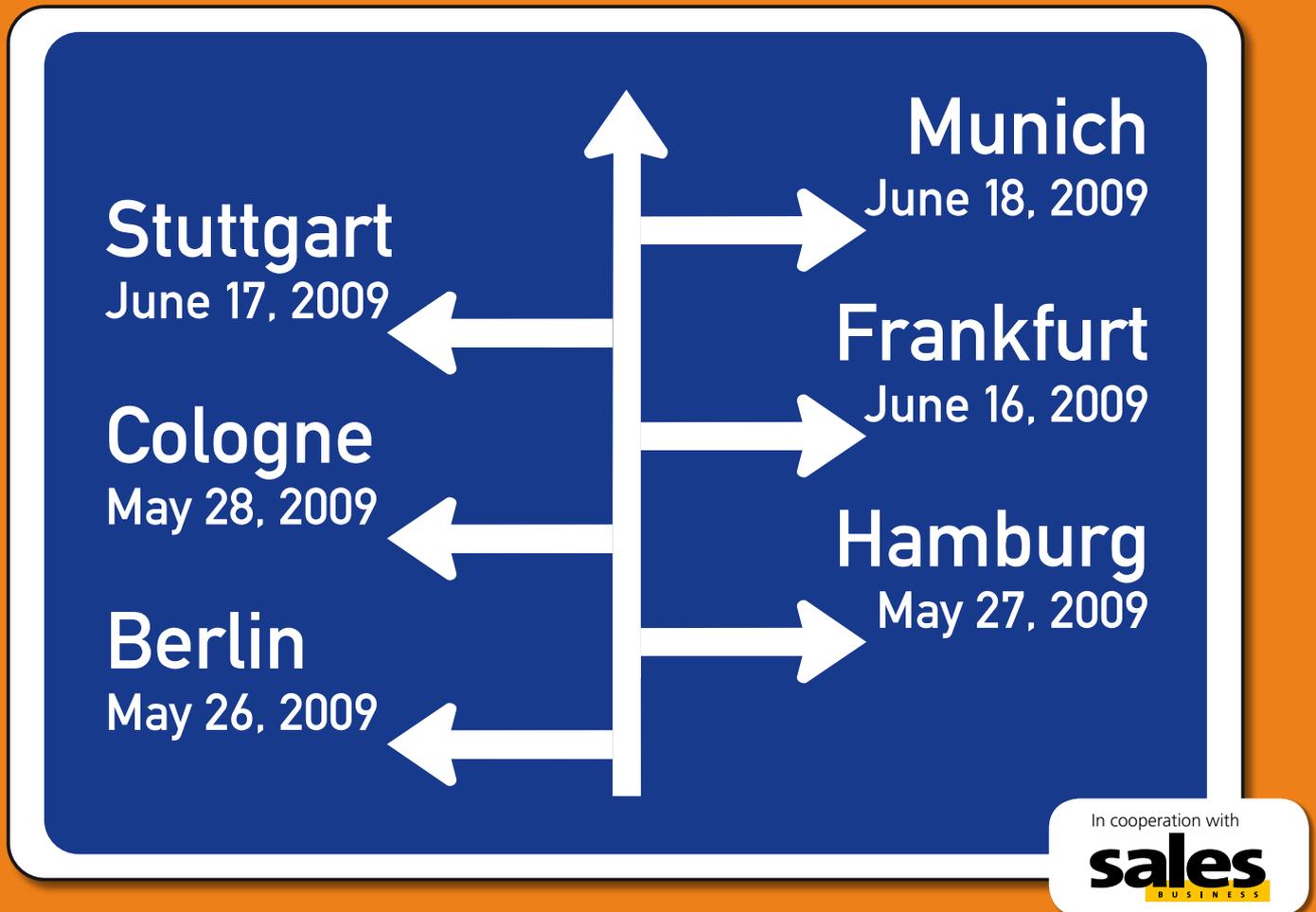
Additional information on the new GfK Russia Map Edition can be found at [www.gfk-geomarketing.com/russia](http://www.gfk-geomarketing.com/russia).

If you have any questions, please contact Nicole Lahr at +49 (0)7251 9295160 or [n.lahr@gfk-geomarketing.com](mailto:n.lahr@gfk-geomarketing.com).



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- How can an analysis of customer responses lead to greater marketing success?

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# Meet GfK GeoMarketing!

## Come to the CeBIT trade fair and get to know RegioGraph 2009 firsthand!



We'll be unveiling RegioGraph 2009 at the upcoming CeBIT 2009 trade fair on March 3, 2009 in Hannover. We'd be delighted to present this new product to you at our trade fair stand. You'll find us from March 3-8 at the Microsoft Partner Stand A26 in hall 4 at the CeBIT trade fair.

Book an appointment for a live presentation of the new RegioGraph 2009 at [www.gfk-geomarketing.com/cebit](http://www.gfk-geomarketing.com/cebit).  
Questions? Contact Nicole Lahr at +49 (0)7251 9295160 or [n.lahr@gfk-geomarketing.com](mailto:n.lahr@gfk-geomarketing.com).

## Presentations by GfK GeoMarketing experts "Customer 2009" Handelsblatt magazine (trade journal) convention

Düsseldorf, March 25, 2009, 3:45pm  
Gerrit Schreiber, GeoMarketing consultant: "Achieving success through a geomarketing approach to direct marketing"

## Real estate forum: "Dresden as an emergent metropolis"

Dresden, March 26, 2009, 3pm  
Udo Radtke, head of project development consulting, "Retail demand and Dresden's emergence as a shopping hub"

## GfK GeoMarketing on tour

In 2009, GfK GeoMarketing's experts will be coming somewhere near you!

"Achieving greater efficiency and success through a geomarketing approach to sales and marketing". This is the theme that will be explored during our 2009 six-stop road show, which we'll be doing in collaboration with SalesBUSINESS Magazine. The presentations address the various tasks faced by sales and marketing heads. Numerous practice-oriented examples, solutions and tips for successfully implementing a geomarketing approach guarantee that these presentations will be interesting, informative and stimulating.

For details on the dates of these presentations and to register, visit [www.gfk-geomarketing.com/roadshow](http://www.gfk-geomarketing.com/roadshow). We're looking forward to meeting you!

# Results of the RegioGraph competition

Many thanks for taking part in the RegioGraph competition contained in the previous edition of GeoMarketing News. We've awarded a full version of RegioGraph to the lucky winner!

Below are the correct answers to the GfK Purchasing Power 2008/2009 competition:

In which city do the wealthiest Hungarians live?

Answer: **Budapest**

What is the name of the Swedish municipality with the highest purchasing power?

Answer: **Danderyd**

In which Polish city has the purchasing power grown most since 2007?

Answer: **Warsaw**

Which group of Ukrainian inhabitants has more disposable income – the inhabitants of Kiev or Ugledar?

Answer: **Ugledar**

Do Icelanders have more or less purchasing power than the European average?

Answer: **more**

The winner is **Gerhard Hinz** from the company **Südpack** in Ochsenhausen. Many congratulations and much success and pleasure with RegioGraph!

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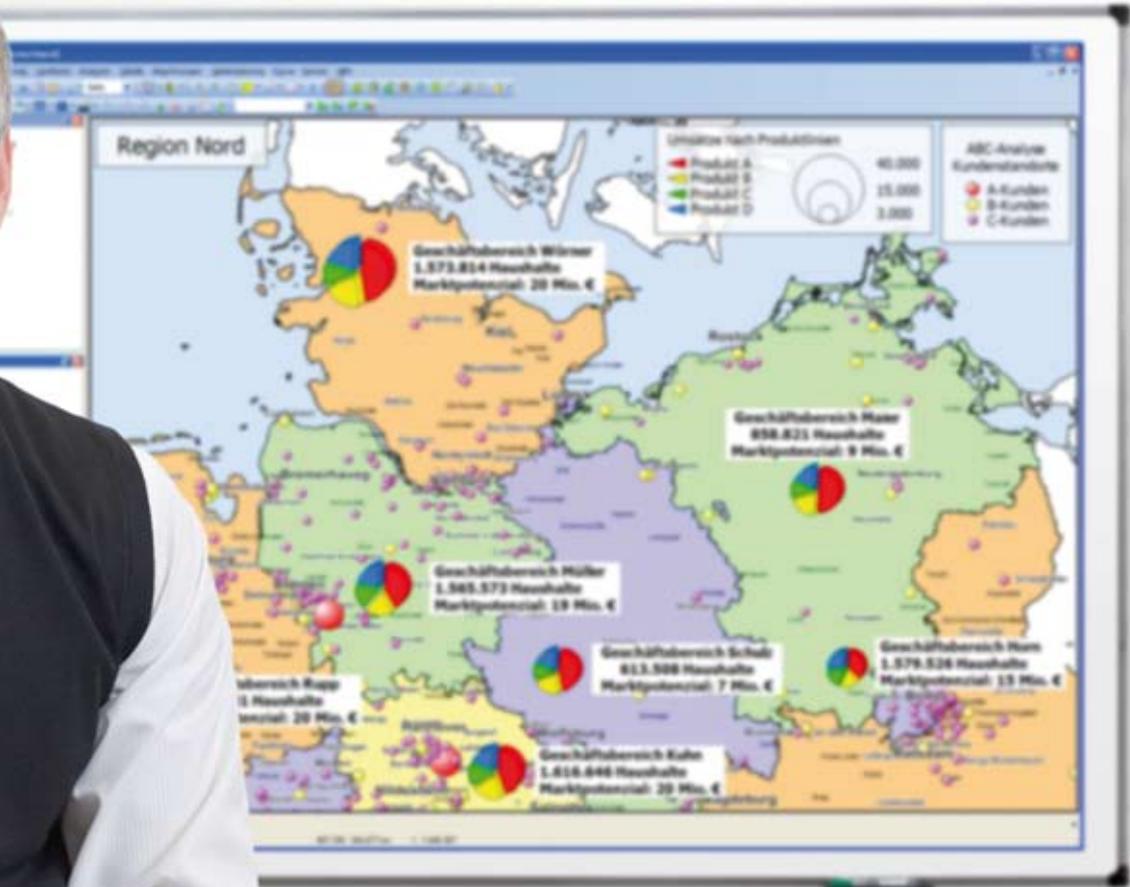
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