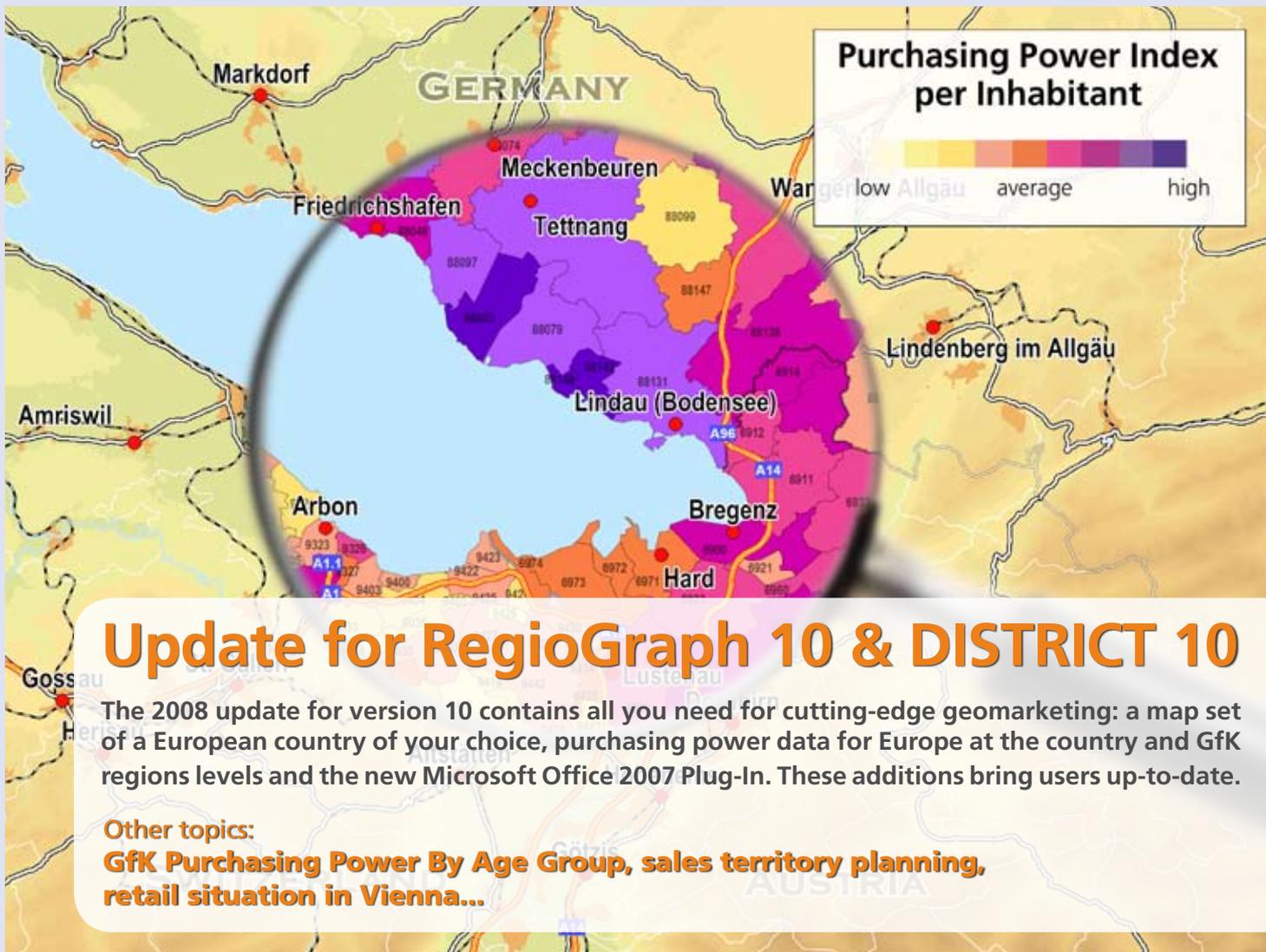


GfK

GfK GeoMarketing

News

02|2008



Trade Fairs

Visit us at the 2008 mailingtagen fair in Nuremberg from June 18-19 at stand no. 111 in hall 4A.

Free map inside

This issue includes a free poster illustrating purchasing power in Germany by age group as well as a match schedule for the 2008 UEFA European Football Championship.

Welcome to GfK GeoMarketing News!

Dear Readers,

Welcome to another information-packed issue of GfK GeoMarketing News!

There are some particularly exciting new developments to report. Chief among these is the recently released **2008 RegioGraph 10 and DISTRICT 10 update**. This new update further enhances the power and user-friendliness of GfK GeoMarketing's award-winning software applications.

One of update's key highlights is a **new plug-in** that allows you to access RegioGraph's and DISTRICT's functions from within the 2007 Microsoft Office applications, Word, Excel and PowerPoint. This makes it easier than ever to **integrate geomarketing into your daily work routine**. The new integrated interface boosts productivity and functionality.

Other important themes include the release of the **2008 GfK Purchasing Power By Age Group dataset for Germany**, as well as valuable tips for **successful sales territory planning** provided by our experienced geomarketing consultant, Michael Büttcher.

As always, we're proud to bring you news on the latest breaking trends and developments in the field of geomarketing.

Pleasant reading!

Wolfram Scholz,
Managing Director, GfK GeoMarketing



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New at GfK GeoMarketing

Distinction awarded to geomarketing solution

R RegioGraph 10

Our geomarketing software application RegioGraph 10 received a distinction in the Initiative Mittelstand prize category of "Knowledge Management" at the 2008 CeBIT. RegioGraph 10's extraordinary user-friendliness in addition to its superb maps and market data (e.g., GfK Purchasing Power) impressed both jury and users alike. The Microsoft Office Plug-In included with the 2008 update further distinguished RegioGraph 10 from its competitors. This new plug-in makes it possible to move fluidly between RegioGraph 10 and the Microsoft Office Suite applications, transferring data and map analyses without having to switch between programs. "The new Office Plug-In saves time and facilitates an even easier exchange of information," explains GfK GeoMarketing managing director Wolfram Scholz.



Read more about the new 2008 update for RegioGraph / DISTRICT and the included Office Plug-In in our lead article on pages 3 and 4.

i GfK Age Groups 2008 – the German population categorized into 17 age brackets

Interested in finding out exactly how many members of your target groups live in a particular area? GfK Age Groups 2008 gives you precise information on the distribution of Germany's population, divided into 17 age classifications. With this knowledge you can more accurately assess potential and turnover estimates on a region-by-region basis. The dataset includes information at the level of municipalities and five-digit postal districts Germany-wide.

If you have questions about GfK Age Groups (Germany), please contact Nicole Lahr at +49 (0)7251 9295160 or n.lahr@gfk-geomarketing.com.

i GfK Office Supplies Potential – 2008 dataset available soon

GfK Office Supplies Potential shows the turnover potential for office-related supplies in Germany, providing a solid foundation for optimizing your sales force and location planning. The dataset offers information on the outfitting of office work stations according to region. The study contains entries for computers (PCs), telecommunications (incl. mobile communications) products, printers, copiers, other data processing devices and office furniture. This year's study has been completely recalculated, providing information on the level of Germany's municipalities and postal code districts for the first time.

GfK GeoMarketing expects to release the GfK Office Supplies Potential 2008 dataset in early June. For more information, please contact Sonja Scharf at +49 (0)7251 9295110 or s.scharf@gfk-geomarketing.com.



i The latest retail data!

The 2008 version of **GfK Retail Purchasing Power Germany** will soon be available. This dataset reveals retail-related consumer potential. Companies can use this information to determine how much inhabitants of certain regions spend on retail or mail-order retail products. Also soon to be released are the **GfK POS Turnover** and **GfK Retail Central-ity** datasets. The former shows how much the population is spending at particular point-of-sale locations, while the latter is a measure of the economic attractiveness of a city with regard to its ability to draw consumers from surrounding regions. Updates for other European countries will follow.

For more information on GfK market data, please contact Oliver Giehsel at +49 (0)7251 9295165 or o.giehsel@gfk-geomarketing.com.

New: Geomarketing in Practice

GfK GeoMarketing will publish a 24-page booklet titled *Geomarketing in Practice*. This informative publication illuminates the various applications of geomarketing in sales, marketing, controlling and expansion planning via clearly explained examples.

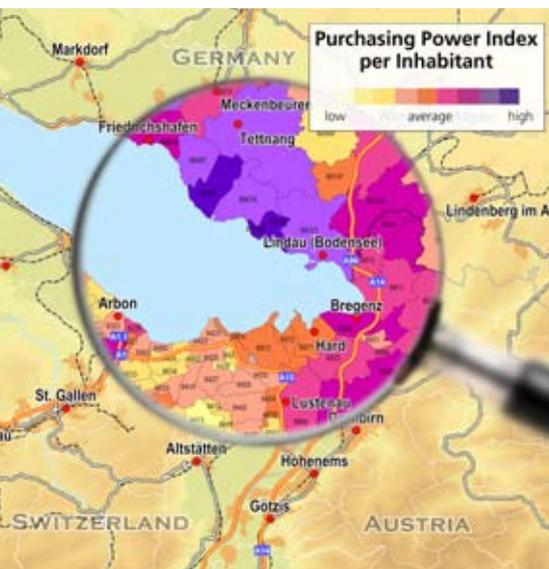
Request your free copy by e-mailing Alexandra Deutsch at a.deutsch@gfk-geomarketing.com. The booklet will be available as of July.

Job vacancies

GfK GeoMarketing continues to grow and is currently seeking to fill positions in sales, location research and software development. Prospective applicants can read job descriptions and obtain application information at www.gfk-geomarketing.com/career.

RegioGraph and DISTRICT 2008 update: Geomarketing from within Excel and Word

The 2008 update for version 10 contains all you need for cutting-edge geomarketing: a map set of a European country of your choice, purchasing power data for Europe at the country and GfK regions levels and the new Microsoft Office 2007 Plug-In. These additions bring users up-to-date.



Thanks to a new development by GfK GeoMarketing, users of the geomarketing solutions RegioGraph 10 and DISTRICT 10 can access geomarketing functionality from directly within the Microsoft Office 2007 applications, Word, Excel and PowerPoint. The 2008 update of RegioGraph and DISTRICT 10 includes this new plug-in along with a map set of a European country of your choice and purchasing power data for Europe at the country and GfK regions level.

The Office 2007 Plug-In enables users to access RegioGraph and DISTRICT functions via a menu bar in the MS Office Suite applications.

For example, after editing a sales structure in Excel, the file can be incorporated into the corresponding DISTRICT or RegioGraph project without switching applications or going through a laborious export procedure. By the same token, users can import layer tables from a particular geomarketing project and edit them within Excel. Changes can then be implemented into the corresponding geomarketing project and reflected on the associated maps. Maps created in RegioGraph/DISTRICT can be opened directly within Word, Excel or PowerPoint as bitmap or vector graphics. All of this is possible without lengthy export/import procedures.

With the new seamless integration of RegioGraph 10's and DISTRICT 10's functions into the well-known Microsoft Office applications, Word, Excel and PowerPoint, it's easier than ever for users to incorporate geomarketing into their daily work routines and quickly take advantage of the advantages this offers. RegioGraph 10 is provided as a stand-alone product or bundled with Microsoft Office 2007 Small Business Edition.

2008 update includes the latest map set for a European country of your choice

In addition to a comprehensive array of powerful tools for market analysis and sales territory planning, RegioGraph 10 and DISTRICT 10 include a map set for a European country of your choice as well as purchasing power data for Europe at the country and GfK regions level. The market data and maps fit together seamlessly and are ready for use immediately following installation.

GfK has been calculating purchasing power since 1937. Purchasing power is the acknowledged benchmark for assessing consumer potential based on

GfK GeoMarketing's RegioGraph and DISTRICT are Germany's leading geomarketing software applications (based on the number of users) for the visualization and analysis of company and market data on digital maps. Companies from all branches of trade use these applications for region-sensitive market analysis and optimization. The more than 100 analytical and visualization possibilities offered by RegioGraph and DISTRICT allow companies to carry out more efficient sales controlling, assessments of potential and evaluations of regional market share. The results of the analyses can be easily exported into presentations, company reports and intra- and internet websites.

 RegioGraph 10 –
The best GfK GeoMarketing solution ever!

 DISTRICT 10 –
No. 1 for sales territory planning!

consumers' places of residence. Up-to-date maps and market data on potential – such as GfK Purchasing Power – are essential building blocks for business success. Every year there are many administrative changes, such as the recent postcode reform in Italy. It's vital that companies have the latest information on their areas of operation in order to accurately evaluate performance and take appropriate action.

RegioGraph 10 and DISTRICT 10 now include the new Microsoft Office 2007 Plug-In.

Hubert Bacher, executive director of BACHER Publishers in Sulz-Kastell (Germany) and longtime user of RegioGraph, is enthusiastic about the new plug-in.

"My daily use of RegioGraph primarily involves the quick production of theme-based maps for my customers," Bacher explains. "This process is a lot easier and more time-efficient with the new RegioGraph 2008 update."

Bacher's company produces paper-based and digital maps (bitmap format) of every country in the world. He frequently receives specialized requests from his customers – for example, many wish to see their customers illustrated on a map. This is child's play with RegioGraph's new Microsoft Office Plug-In, which allows Bacher to import the company's data (in the form of an Excel spreadsheet) directly into RegioGraph. In the blink of an eye, the map in question is populated with points representing each of the company's customers. Using the plug-in, Bacher can then import the completed map as an image or vector graphic into PowerPoint or Word. The entire process can be carried out in just a few steps.

"Thanks to this plug-in, I save a lot of valuable working time," says Bacher.

Update now to RegioGraph 10 or DISTRICT 10 2008! Update prices start at from **€498**

Read more about RegioGraph and DISTRICT at www.gfk-geomarketing.com/software.

You can find a tutorial for the new plug-in on page 11. Read more about the latest available maps on page 10.

At a glance:

RegioGraph 10 and DISTRICT 10 offer companies of all sizes a highly powerful and user-friendly geomarketing solution at an unbeatable price. The 2008 update gives users not only an invaluable basis for planning, but also a powerful and elegant tool in the form of the Office 2007 Plug-In. This new integration of geomarketing functionality into Microsoft's products allows users to utilize the full scope and potential of RegioGraph 10 and DISTRICT 10.

If you have questions about the 2008 update of RegioGraph/DISTRICT, please contact Thorsten Lauszus at +49 (0)7251 9295145 or t.lauszus@gfk-geomarketing.com.

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

Balanced sales territories are an important prerequisite for your company's success!

GfK GeoMarketing has optimized the sales and service territories for over 2,000 companies, in Germany and internationally. Profit from the knowledge of GfK GeoMarketing's experienced consultants and achieve new levels of success with your sales territories

- We visualize and analyze your sales data.
- We develop alternative territorial structures and sales scenarios.
- We support you throughout the implementation of your new sales strategy.



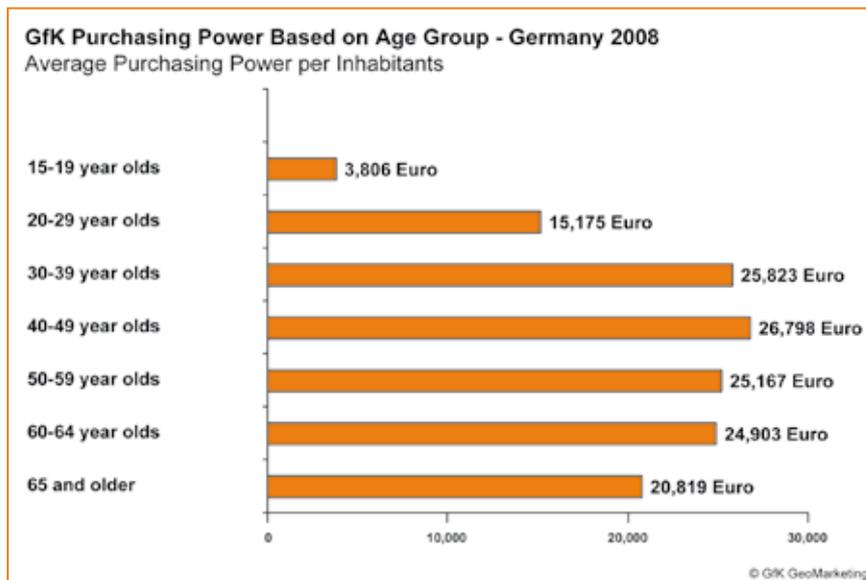
For more information on GfK GeoMarketing consulting services, please call: +49(0)7251 9295200.

GfK Purchasing Power By Age Group, 2008 – Identify your market potential

Which German age group has the most money available for consumer spending? What are the optimal sites for new branch locations? GfK Purchasing Power By Age Group 2008 answers these and many other questions related to marketing, sales and expansion planning.

Whether you're making decisions about how to obtain new customers, expand into a new region or implement a marketing campaign, one thing is for certain: success requires that you locate and hone in on your key target groups. This is precisely the task for which GfK Purchasing Power By Age Group provides an objective benchmark.

This informative dataset reveals that Germany's stark regional variations in purchasing power levels are mirrored by significant differences in disposable income among the country's age groups. Germany's largest share of purchasing power lies in the hands of 30 to 60 year olds. With an average of €26,798 per person per year at their disposal, 40 to 49 year olds possess the country's highest purchasing power. The recent GfK purchasing power study for age groups demonstrates that those younger than 30 or older than 60 have distinctively lower purchasing power levels than members of the nation's other age ranges.



With a combined purchasing power of 368 billion euros, 40 to 49 year olds lead the pack, followed by those 65 and older who have 339 billion euros at their disposal. Thirty to thirty-nine year olds enjoy a purchasing power of 289 billion euros, while 50 to 59 year olds post a combined figure of 272 billion euros.

The west-east divide – largest among 50 to 59 year olds

A comparison between western and eastern Germany reveals that the difference in disposable income levels among young working professionals from 20 to 29 years old is smallest when compared to other age ranges. This age group enjoys an average purchasing power of €15,910 per person per year in

About GfK Purchasing Power By Age Group

In profiling existing and potential customers, there are two criteria whose importance ranks above all others: age and available purchasing power. GfK Purchasing Power By Age Group 2008 correlates precisely these two criteria, dividing the German population into seven age classifications. This dataset can therefore be used to pinpoint locations with high concentrations of those 50 and older, senior citizens as well as young age groups such as homeowners aged 30 to 40.

Companies use purchasing power data in addition to other region-specific market data as part of a geomarketing approach to enhanced target group identification, location planning and sales territory optimization.

western Germany, while its counterpart in eastern Germany has €12,573 available for spending.

Berlin forms an exception, however. Simone Baecker-Neuchl, GfK GeoMarketing director of Market Data & Research, explains: "Thanks to the large number of universities, academies and other educational institutions, an above-average number of individuals in the 20-29 year-old age group reside there. The working members of this group tend not to have a high level of income, though. As a result, the purchasing power of the "internship generation" in Berlin lies at €10,675, a figure significantly below the national average."

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)7251 9295230
or visit www.gfk-geomarketing.com/digitalmaps.

The greatest differences between eastern and western purchasing power levels exist among 50 to 59 year olds. Their average purchasing power (per person per year) in Germany's western states lies at €26,865 compared to only €19,121 in the eastern states. Berlin once again forms an exception to the rule. The German capital's 50 to 59 year olds have a purchasing power of €22,267, a figure well in excess of the eastern German average. This gap between Berlin and the rest of eastern Germany is even more apparent among those 60 and older.

Hamburg top of the list for senior citizens

Hamburg places first in the 60 and older generation, significantly outpacing this age group's purchasing power in the otherwise dominant Munich area. Although Bavaria boasts the country's highest purchasing power among 20 to 29 year olds, it only places fifth among 60 to 64 year olds, and eighth among those 65 and older.

A comparison of the country's largest metropolises of the North and South – Hamburg and Munich, respectively – reveals the extent of these regional monetary disparities between the age groups: Munich's approximately 200,000 citizens between 20 and 29 have 4.3 billion euros at their disposal, while the 250,000 Hamburg residents in the same age range have around one billion euros less.

It's only in the 65 and older category that Hamburg residents substantially outpace their Munich counterparts: Hamburg's 326,000 over 65s have 8.6 billion euros at their disposal, compared to only 5.5 billion euros among Munich's 226,000 members of this age group. Hamburg senior citizens thus have an average purchasing power level of €26,471 per person per year – €2,000 euros more per person than is available to similarly aged Munich residents.

Soaring purchasing power in the South

The 65 and older generation is the only age group for which Hamburg boasts a purchasing power level that exceeds that of the country's southern regions. The Bavarian counties and greater metropolitan areas of Starnberg, Munich and Ebersberg – as well as the Hessian counties of Main-Taunus and Hochtaunus – rank in the top 20 in every age group, while Hamburg can only claim this distinction for the 65 and older age group.

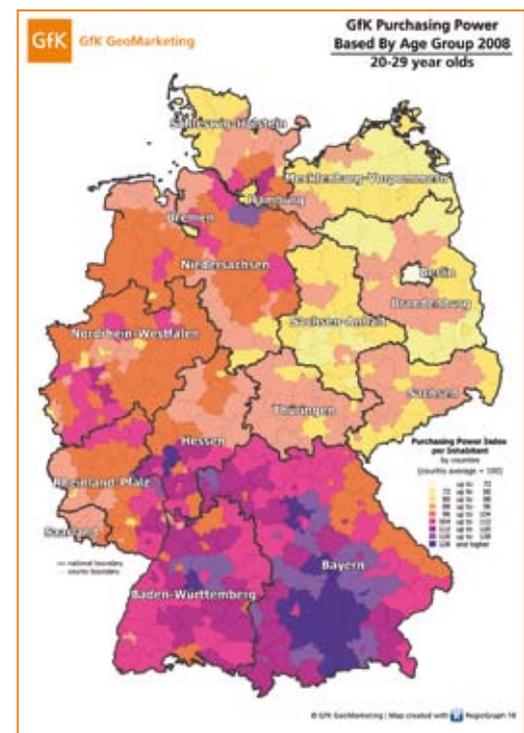
Locate target groups, plan marketing actions and expand into promising regions

GfK Purchasing Power By Age Group is particularly useful to companies who sell directly to end-consumers. The dataset allows such companies to determine the regions where the purchasing power level of their target groups is highest. By visualizing this information, businesses can identify the regions of greatest potential at a glance. Likewise, this information is invaluable for planning marketing campaigns and determining optimal sites for new branch

locations in one's existing area of operation or beyond. Sales managers can use the GfK Purchasing Power By Age Group dataset to ensure that sales territories are apportioned equally based on their purchasing power levels and to objectively evaluate the performance of sales force members.

GfK Purchasing Power By Age Group is calculated yearly at the level of municipalities and five-digit postal code districts Germany-wide. For more information, please contact Sonja Scharf at +49 (0)7251 9295110 or s.scharf@gfk-geomarketing.com.

Read more about purchasing power at www.gfk-geomarketing.com/purchasingpower.



GfK Purchasing Power Austria and Switzerland 2008 now available!

2008 purchasing power data for Germany, Austria and Switzerland has now been compiled. Purchasing power data for Austria and Switzerland is available down to the level of municipalities and postcodes. These datasets and seamlessly fitting maps are included as part of the 2008 update for the German version of RegioGraph 10 and DISTRICT 10. English version-holders can purchase these datasets (and corresponding map sets) separately.

Order this important update today and ensure that you have a solid and up-to-date foundation for your decisions!
Contact Alexandra Deutsch at +49 (0)7251 9295170 or a.deutsch@gfk-geomarketing.com.

GfK Retail Location Guide – Germany 2008



A collection of the most important information for retail- and location-related decisions!

- Data on inhabitants, households, automobile ownership and GfK Retail Purchasing Power for each included city
- Data on demand levels in both the food and non-food retail sectors
- Overview maps and graphics illustrating demographic data and catchment areas

*With coverage of 482
German cities, from
Aachen to Zwickau!*



More information at +49(0)40 22711234
or www.gfk-geomarketing.com/locationguide



GfK GeoMarketing

New 2008 map sets for Germany, Austria and Switzerland

The map sets for Germany, Austria and Switzerland have recently been updated, giving companies an ideal basis for planning in any – or all – of these three countries. Together the three map sets comprise more than 100 maps, all of which reflect this past year's regional and administrative changes.



These newly updated digital map sets from GfK GeoMarketing allow companies to more efficiently analyze markets and customers, structure sales territories and optimize branch networks. Up-to-date and accurate maps are essential components for successful geomarketing. Changes in postcode boundaries, regional borders and street networks occur every year. Without maps that reflect these changes, it is difficult to analyze and represent data accurately. One case-in-point would be the 2007 overhaul of county boundaries in the German federal state of Saxony-Anhalt. The result was dramatic: 24 counties were reduced to 14, requiring more than 1,000 municipalities to be assigned a new postcode. Without a map that reflects this change, it's clear that errors and inaccuracies would occur with regard to correlating company and market data.

Since 2007, there have been 1,300 such changes, all of which have been

taken into account in the preparation of the newly updated map sets. These map sets include comprehensive administrative and postal maps of each of

the three countries, in addition to numerous topographic maps, featuring characteristics such as city points, rivers, elevation levels and special themes such as Nielsen areas. Like all cartographic products provided by GfK GeoMarketing, these maps contain geographic coordinates. Using the included regional identifiers, information such as the postcodes in customer addresses can be used to illustrate this data on the maps. Also included in the maps are national and local topographic attributes such as regions, rivers and cities.

GfK GeoMarketing provides the updated map sets in the following GIS formats: .shape (ESRI), .tab (Map-Info) and .lay (GfK GeoMarketing). The .lay format includes GfK Purchasing Power data and Tele Atlas street maps.

If you have any questions about the map sets, please contact Alexandra Deutsch at +49 (0)7251 9295170 or a.deutsch@gfk-geomarketing.com.

Soon available: Newly digitized maps for Japan and Slovenia

GfK GeoMarketing's recently revised digital map set for Japan offers all companies interested in expanding their operations to East Asia a highly reliable foundation for planning. The maps included in the set are ready for use in any standard geomarketing software application. An exciting and unprecedented addition to this map set are the boundaries for Japan's approximately 950 three-digit postcode districts.

Japan's approximately 2,000 municipalities underwent a comprehensive reform that resulted in completely redrawn boundaries that almost halved the original number of municipalities. In addition to reflecting these changes, this map and the maps of the country's prefectures include Japanese language attributions. The Japan map set also includes numerous topographic maps, such as the newly created city point map with more than 10,000 localities, as well as maps featuring the transportation network, rivers and much more.

Is your company more interested in Eastern European markets? Our latest Slovenia map set provides a precise and up-to-date basis for planning in this area. The 2008 Slovenia map set features a newly digitized topography. The resulting digital maps are highly accurate, featuring precise administrative and postal boundaries, more detailed coastlines and more than 5,000 additional city points.

More information available at www.gfk-geomarketing.com/digital-maps.htm.

Match Schedule for the 2008 UEFA European Football Championship in Austria & Switzerland



Group A			Group B			Group C			Group D		
Switzerland	Portugal	Result	Austria	Germany	Result	Netherlands	Romania	Result	Greece	Spain	Result
Czech Republic	Turkey	Result	Croatia	Poland	Result	Italy	France	Result	Sweden	Russia	Result
Switzerland	Czech Republic	:	Austria	Croatia	:	Romania	France	:	Spain	Russia	:
07/06/08 - Basel - 18:00		_____	08/06/08 - Vienna - 18:00		_____	09/06/08 - Zurich - 18:00		_____	10/06/08 - Innsbruck - 18:00		_____
Portugal	Turkey	:	Germany	Poland	:	Netherlands	Italy	:	Greece	Sweden	:
07/06/08 - Geneva - 20:45		_____	08/06/08 - Klagenfurt - 20:45		_____	09/06/08 - Berne - 20:45		_____	10/06/08 - Salzburg - 20:45		_____
Czech Republic	Portugal	:	Croatia	Germany	:	Italy	Romania	:	Sweden	Spain	:
11/06/08 - Geneva - 18:00		_____	12/06/08 - Klagenfurt - 18:00		_____	13/06/08 - Zurich - 18:00		_____	14/06/08 - Innsbruck - 18:00		_____
Switzerland	Turkey	:	Austria	Poland	:	Netherlands	France	:	Greece	Russia	:
11/06/08 - Basel - 20:45		_____	12/06/08 - Vienna - 20:45		_____	13/06/08 - Berne - 20:45		_____	14/06/08 - Salzburg - 20:45		_____
Switzerland	Portugal	:	Austria	Germany	:	Netherlands	Romania	:	Greece	Spain	:
15/06/08 - Basel - 20:45		_____	16/06/08 - Vienna - 20:45		_____	17/06/08 - Berne - 20:45		_____	18/06/08 - Salzburg - 20:45		_____
Turkey	Czech Republic	:	Poland	Croatia	:	France	Italy	:	Russia	Sweden	:
15/06/08 - Geneva - 20:45		_____	16/06/08 - Klagenfurt - 20:45		_____	17/06/08 - Zurich - 20:45		_____	18/06/08 - Innsbruck - 20:45		_____

	Points	Goals									
1.			1.			1.			1.		
2.			2.			2.			2.		
3.			3.			3.			3.		
4.			4.			4.			4.		

Quarter-finals	Semi-finals	Final
-	:	
19/06/08 - Basel - 20:45 Winner Group A - Runner-up Group B		
-	:	
20/06/08 - Vienna - 20:45 Winner Group B - Runner-up Group A	25/06/08 - Basel - 20:45	
-	:	
21/06/08 - Basel - 20:45 Winner Group C - Runner-up Group D		29/06/08 - Vienna - 20:45
-	:	
22/06/08 - Vienna - 20:45 Winner Group D - Runner-up Group C	26/06/08 - Vienna - 20:45	

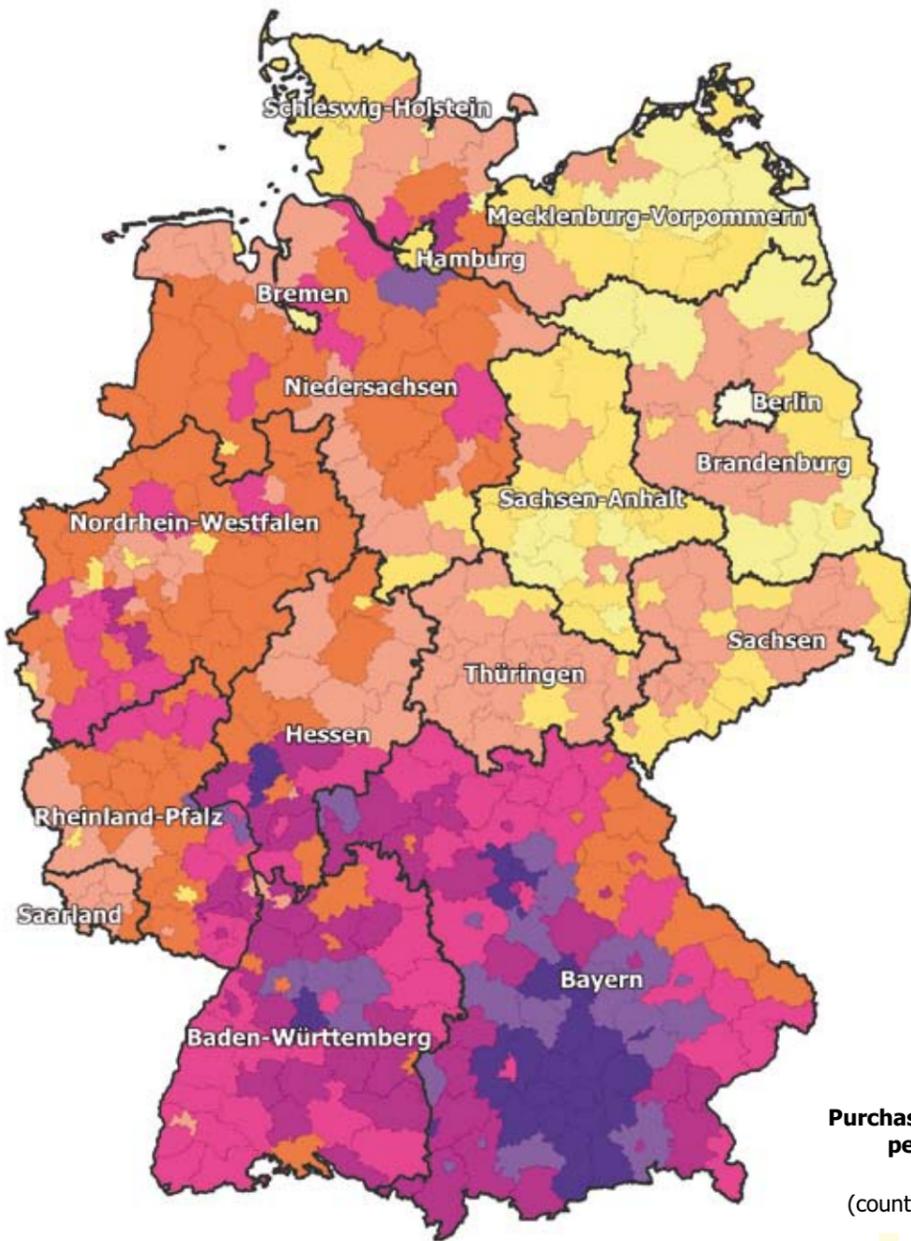


RegioGraph 10 –
The best GfK GeoMarketing solution ever!

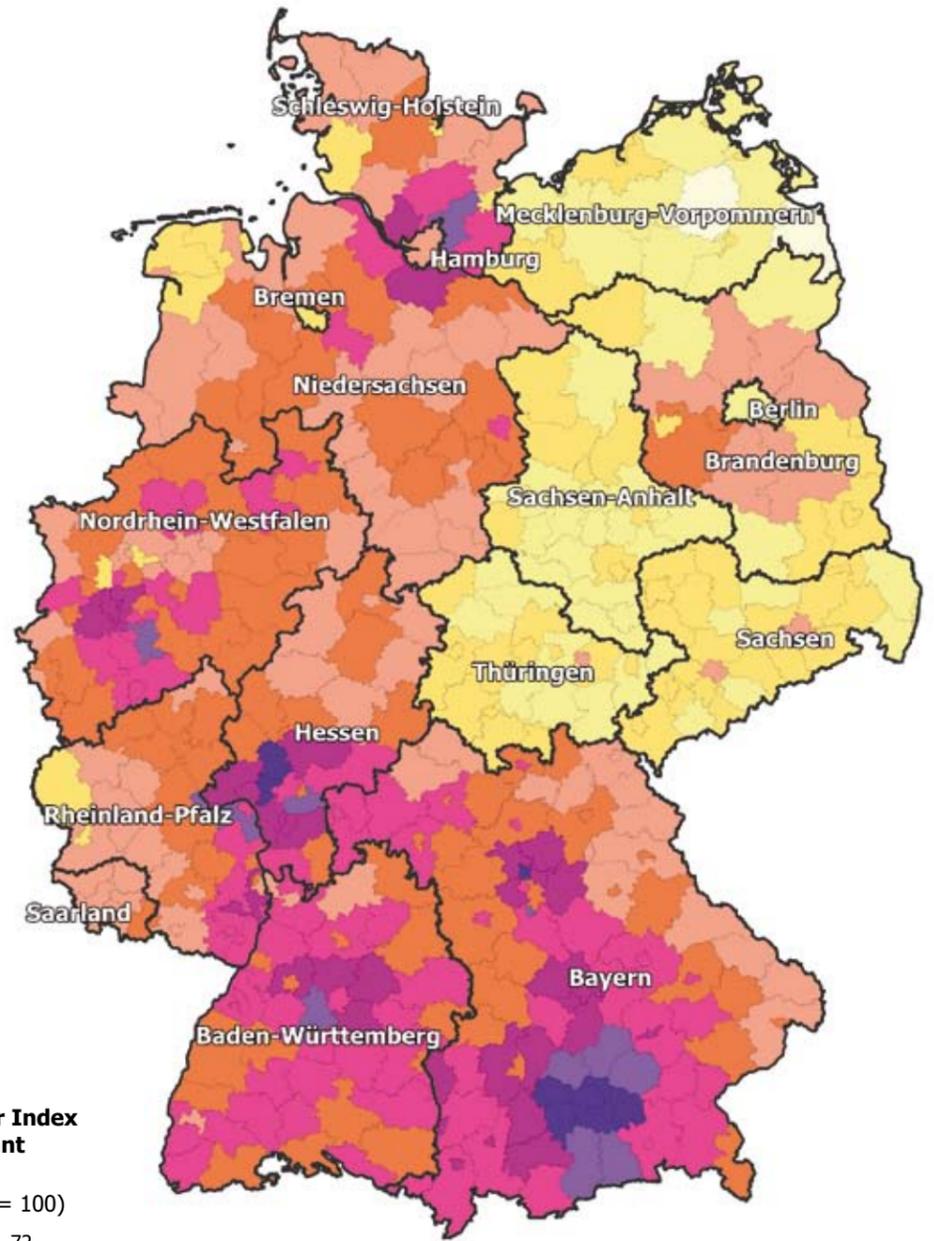


DISTRICT 10 –
No.1 for sales territory planning!

www.gfk-geomarketing.com

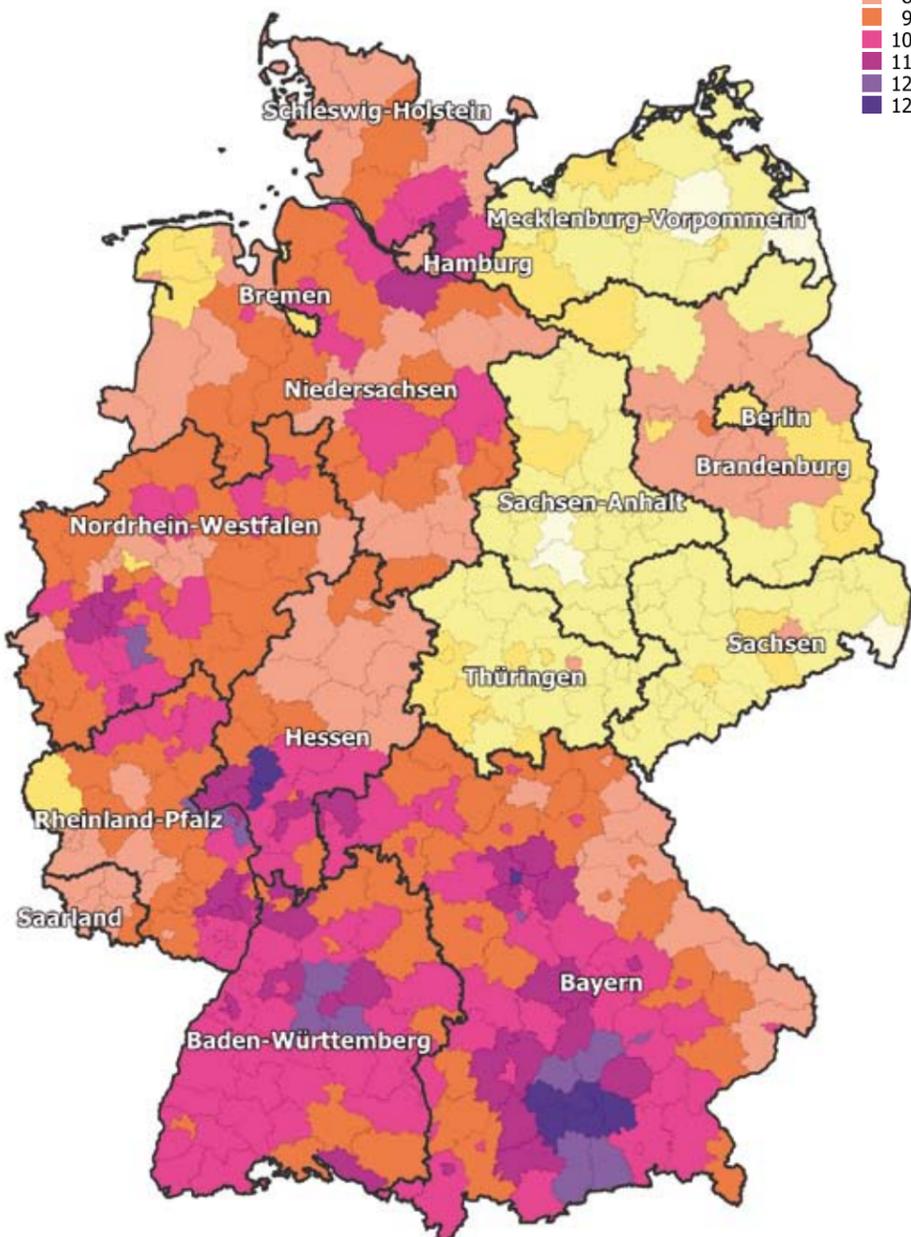
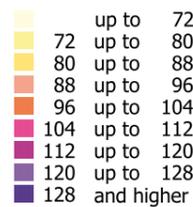


20-29 year olds

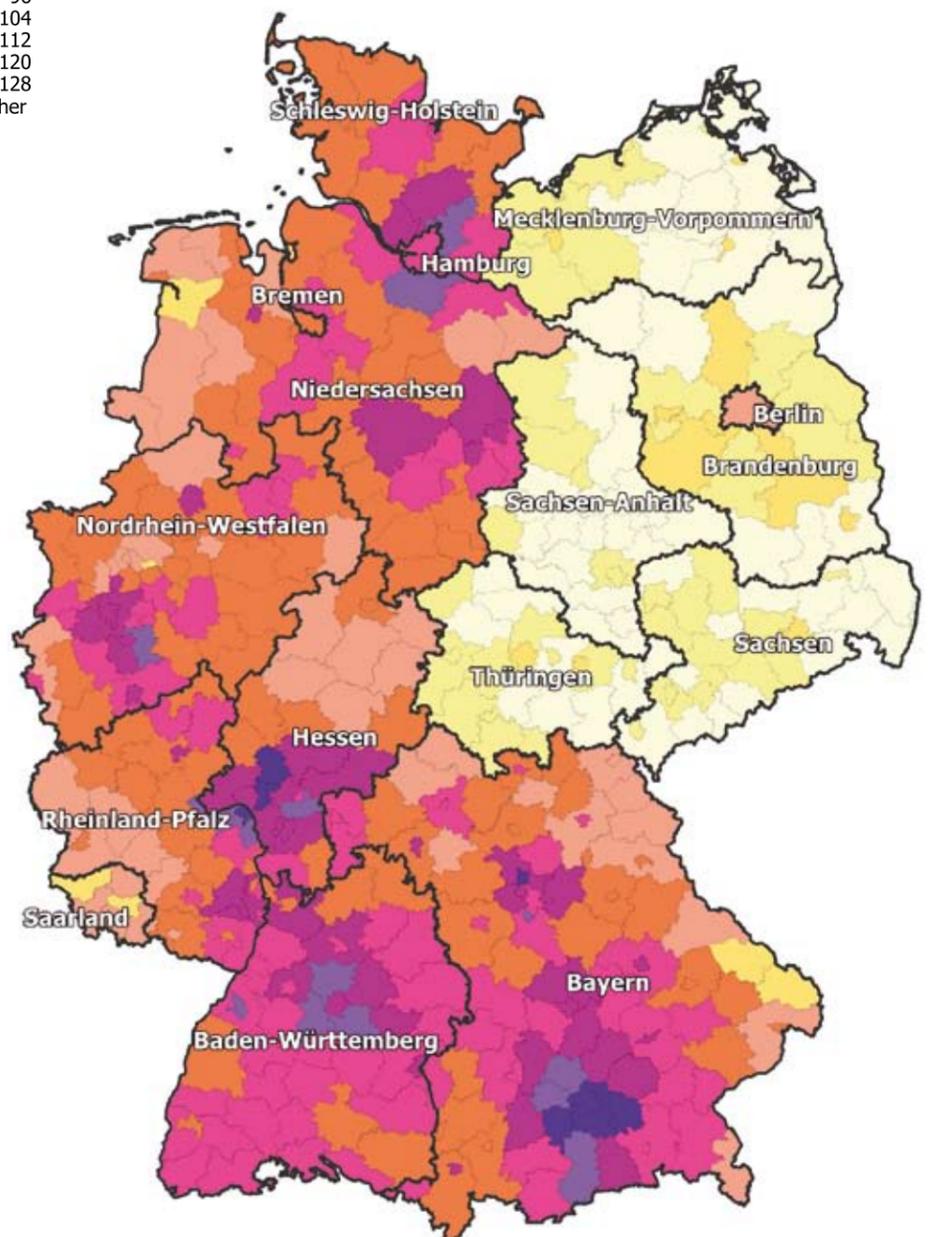


30-39 year olds

**Purchasing Power Index
per Inhabitant
by counties**
(country average = 100)



40-49 year olds

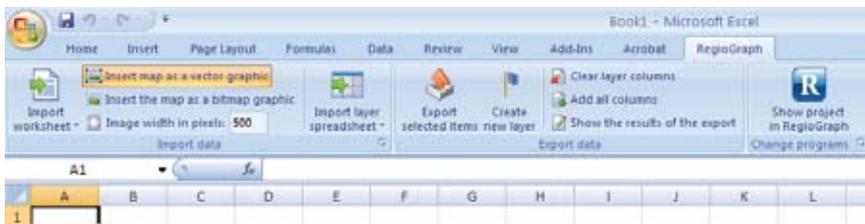


50-59 year olds

Tutorial: Import your data directly from Microsoft Office 2007

The new RegioGraph / DISTRICT 2008 update enables users to import their project worksheets, create presentations and edit regional sales and service networks from directly within the MS Office Suite applications via an integrated menu.

In order to make use of the new plug-in, you'll need the 2008 update for RegioGraph or DISTRICT 10 as well as the new MS Office 2007. The plug-in is automatically installed and can be accessed via a RegioGraph or DISTRICT ribbon in the MS Office 2007 application menu bar.



The new DISTRICT menu is visible to the far right of Excel's menu list.

This new feature has numerous applications. For example, you can very easily integrate layer tables into a Word document in the form of a spreadsheet or as text. Just click **Import layer table** and then select the desired layer table. In the blink of an eye, the information is inserted into the Word document.

Show customer locations on a map – directly from within Excel

It's also possible to work in the other direction. For example, you can export market data from Excel directly to a RegioGraph layer or display your customer locations on a map with a mere click of the mouse. Simply highlight the Excel spreadsheet columns that you'd like to insert into a RegioGraph / DISTRICT table layer. You can choose whether to add the selected data as new columns or use them to overwrite existing columns in a table layer. In the case of the latter, the layer table columns in question should be cleared if you do not wish for the new values to reflect the sum of the original and exported values. Carry out the export by clicking on **Export selected items**.

The **Create new layer option** allows you to create a new point layer from within Excel for the purpose of illustrating your customer locations in RegioGraph/DISTRICT: Simply select a matching layer and column (e.g. five-digit postcode districts), and a new layer will be created in your RegioGraph/DISTRICT project.

Planning sales territories in Excel

You can also work with your DISTRICT sales territory projects from directly within Excel. First import the region layer (i.e., the layer that contains your sales territory network) by clicking on **Import layer table**. From within Excel, you can then make any required changes in your sales territory allocations by editing the "Belongs to" column accordingly. By clicking on **Export selected items**, your changes will appear in the corresponding RegioGraph/DISTRICT project.

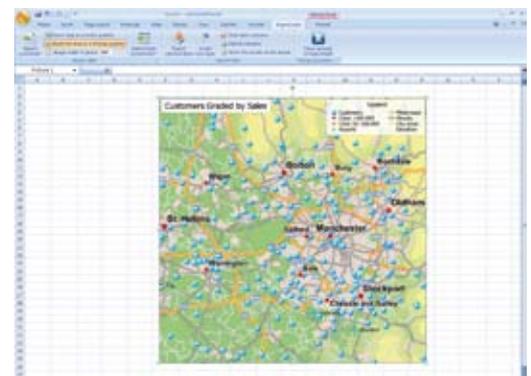
Easily enhance your presentations and documents with map analyses!

Interested in incorporating your maps into a presentation? This can be done from directly within PowerPoint without having to open RegioGraph 10 or DISTRICT 10.

First click on **Import worksheet** to select the GfK project in which your maps are located. You can then choose whether to import the map in question as a vector graphic or a bitmap. Next, simply click **Import worksheet** again and select the worksheet that you'd like to import. An additional feature: You can import close-up map views that you've bookmarked in RegioGraph 10 or DISTRICT 10.

It's also possible to import completed RegioGraph or DISTRICT maps from directly within Excel.

Additional tutorials can be found at



www.gfk-geomarketing.com/tutorials.

Sales territory planning at Vichy: Vitamin-boost with D-10!

We spoke with Stefan Mohrlang, sales controller at Vichy, about how his company uses the sales territory planning software DISTRICT as a rejuvenating force for sales territory planning in the cosmetics sector.



Mr. Mohrlang, what are your company's and division's goals for this business year?

"Our goals are the classic sales goals: increase turnover, improve customer service and, as a means of achieving these ends, optimize the use of our resources with regard to the external sales force."

Describe the characteristics of your product line with regard to sales territory planning and the external sales force?

"In contrast to other sales lines that utilize the pharmacy network but are concentrated primarily in urban areas, we strive for a nationwide presence for Vichy products. Louis Vuitton bags can only be purchased in Berlin or Munich. By contrast, Vichy cosmetics are not targeted to a niche market, but rather a large body of distinguishing consumers. In order to achieve this nationwide presence, we have to steer clear of focusing solely on urban areas, particularly in eastern Germany, where our customers are distributed more evenly throughout the region. This must be taken into account in our sales territory planning."

as possible to align the new sales territories with our existing structure. But even when the boundaries of certain regions remained relatively the same, there was a need to optimize them. Here we had to take numerous factors into account: the location of customers, employees' places of residence, the customer-sales force network as a whole, the division of various sales territories into overarching sales regions, etc."

What approach was taken to achieve these goals – what were the most important phases? Were there regional differences that had to be taken into account?

"First we used DISTRICT to visualize the existing sales structure. We then defined relevant factors for the planned restructuring and used the software to automatically generate a restructuring suggestion. Next we discussed the restructuring model with our sales force, taking their expertise and experience into account. Then Mr. Büttcher used DISTRICT to manually adapt the proposed restructuring to our company's precise specifications. The results were then distributed to all employees in the form of maps and reports."

Please tell us a bit about the implementation of the restructuring – is it already completed?

"Yes, the new structure was implemented very quickly and was entirely successful. Things have continued to develop in a positive direction ever since."

How long has your company been using DISTRICT?

"Vichy has been using DISTRICT since 2003. We take care of the preliminary steps in-house, such as the preparation of the company data. We then use the services of a GfK GeoMarketing consultant to carry out the planning and evaluation steps with DISTRICT here on-site. We have an enormous amount of respect for the experience and expertise offered by your consultants – such as Mr. Michael Büttcher – who are highly skilled at planning and restructuring sales territory networks."

What was the specific task that had to be accomplished? What were the details and conditions concerning the sales territory restructuring?

"From both the standpoint of the market and the company, the time was right for a restructuring. This restructuring needed to take into account both personnel- and region-specific challenges and characteristics. We tried as much



To what extent has geomarketing contributed to L'Oréal/Vichy's success? What is your evaluation of DISTRICT?

"DISTRICT is an immensely helpful tool for sales territory planning due to, among other things, its speed and flexibility. DISTRICT allows us to specify our company-specific criteria and use these as guiding parameters for any restructurings. Using this information, DISTRICT can then generate the optimal solution. We also really value the feature that allows us to manually make changes and immediately have them taken into account and visualized. I'm also very enthusiastic about how attractive and easy-to-understand the generated results are, despite the complexity of the theme."

Many thanks for the interview and best wishes for continued success!



Visit www.vichy.com.

For more information on DISTRICT 10 and sales territory planning, visit www.gfk-geomarketing.com/territoryplanning.

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Streamlining a physicians' insurance consulting network with DISTRICT

The Association of Financial Consultants for German Physicians (*Deutsche Ärzte Finanz*) has been using RegioGraph since 2002 and DISTRICT since 2005 for the visualization of company data, in addition to the planning and further development of service structures.



The Association of Financial Consultants for German Physicians (AFCGP) is one of the leading financial consultancies in the area of established medical professions and providers. The association's specialty is offering advice and delivering insurance packages that protect physicians (including dentists) from personal and work-related risks. The AFCGP is part of the AXA Group, one of the largest insurance and financial services bodies in Germany, with approximately 340 agencies as of the end of 2007. In 2003, we developed a so-called "scoring model" in order to measure and bring clarity to the level of potential in a given region. The scoring model takes into account not only data such as the number of target group members (employed and resident doctors, dentists and graduates in the fields of human medicine and dentistry), but also inventory data (e.g., number of customers per health care provider). A notable advantage of employing this benchmark is that it allows us to assign new health insurance agents a larger number of new customers than to existing agents, who already have their hands full with a significant number of clients.

For the further development and planning of the agents' organizations, we formulated scenarios aligned with the longstanding business plans of the sales division – e.g., "500 agents by 2015". We use DISTRICT in conjunction with this scoring model to plan new agency locations nationwide and provide goals for the further development of existing agents. Our ongoing aim is to secure the sustained and balanced growth of our agents' organizations in their target group market.

For the fine-tuning of specific regions, we use DISTRICT to visualize the locations of consultants – e.g., with symbols scaled according to turnover. Unlike in the case of organizations with permanently employed agents, our freelance agents will not accept rigid sales territory boundaries. This is because potential customer agglomerations tend to overlap, something that is particularly the case in urban areas (see illustration).

Service territories are very important to the AFCGP: these areas are the basis of allocating customer queries within a given region to the local agents. Also, our headquarters plan regular customer visits based on these defined service territories. And finally, internet-based searches for consultants also draw on the existing service territory structure.

Our assessment of five years of potential-oriented location-planning with DISTRICT

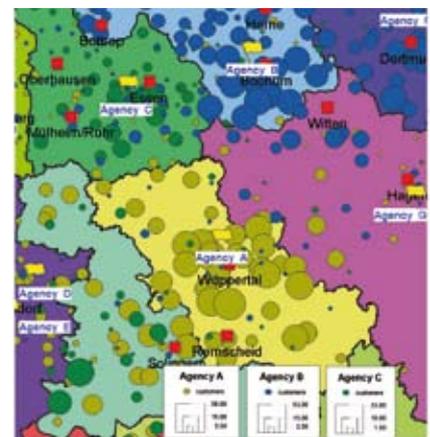
The visualization of locations and service areas with DISTRICT has contributed significantly to achieving objectivity and acceptance in the location assessment and development process. Equally important in terms of transparency and acceptance has been the option to plan and harmonize the scoring models and planning principles with the expressed aims of executive sales managers. Ser-

vice territory planning is not a one-time affair, but rather an ongoing process. The procuring of up-to-date market and company data as well as the ongoing planning and development phases require significant time and effort.

The best results are achieved when service territories and locations can be visualized directly on the computer screen and then fine-tuned in dialogue with the responsible sales managers on an ad-hoc basis.

In addition to its invaluable role in the above described processes, DISTRICT has also proven indispensable in the planning of overarching service structures for the company leadership and specialized consultants.

In short, service territory planning would be unimaginable these days without DISTRICT.



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Retail location Vienna: Ready for EURO 2008 and much more

Nina Zimmermann, GfK GeoMarketing location expert in the Real Estate Consulting division, assesses Vienna as a retail location.

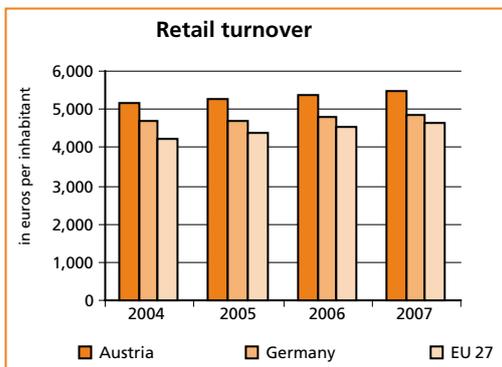
Her message: Internal development versus decentralization.

At 1.7 million inhabitants, Vienna is the economic, political and cultural heart of Austria. Thanks to its favorable location, Vienna is well poised to profit from the opening of southeastern Europe's markets. In fact, Vienna has already emerged as a gateway for economic commerce between middle and eastern European countries.

The Austrian economy is prospering and the population's retail expenditures are well above the EU average. At €5,500 per person and growing, the per capita level of retail spending in Austria exceeds that of Germany. One look at Vienna's above-average purchasing power level affirms this fact.

Conditions are ripe for retail ventures in this area, particularly those located in the promising and attractive inner city. Traditionally, such retail establishments cluster around two main areas: the central Mariahilfer Street with its high concentration of national and international chains as well as local/regional merchants and the traditional department store, Gerngross, that,

due to its renting of building space to other retailers such as Saturn, Butlers and Görtz, can be considered a shopping center; the other main area is the pedestrian zone of Kärntner Street, which enjoys a particularly high level of traffic and an increasingly attractive array of outlets.



These inner-city retail offerings are supplemented by an array of integrated business streets; also an important factor for the city's retail trade is Vienna's collection of shopping centers.

Vienna currently has 16 shopping centers with a combined gross leasable area (GLA) of 10,000 m² and a total physical area of around 478,000 m². This corresponds to around 0.3 m² per person – a figure that hovers around the European average.

It's important to note that the above figures do not include the shopping outlets located just outside the gates of the city in the town of Vösendorf. This is the location of the extremely impressive "Shopping City South," which, along with the neighboring retail outlets, may well comprise Europe's largest retail agglomeration.

In Vienna, the mid-sized retail establishments are the dominant outlet profile, ranging from 20,000-40,000 m².

The influence of the Shopping City South is apparent in the fact that Vienna's



larger shopping centers are concentrated in the northern and eastern areas of the city, with a notable lack of such outlets in the southern and western areas.

For example, the "Danube Center" – which opened in 1975 and expanded multiple times thereafter to its current size of around 98,000 m² GLA, making it Vienna's largest shopping center – is located northeast of the Danube in a central location in the densely populated 22nd city region of Donaustadt. This successful and well-received shopping center is attractive both in terms of its quality and quantity, and there are plans for yet another expansion.

Read more at www.gfk-geomarketing.com/vienna about the distribution of shopping centers in Vienna as well as their planned development.

More information available at www.gfk-geomarketing.com/research.

For more information, contact Nina Zimmermann at +49 (0)40 22711220 or n.zimmermann@gfk-geomarketing.com.

Sales territory planning: Theory and practice

The realities of the marketplace frequently demand that certain limiting factors be taken into account when planning sales territories. Companies ignore these issues at their peril. Michael Büttcher, location planning expert at GfK GeoMarketing, outlines the most important of these points.

Existing customer relationships

It's often an unquestioned premise that existing customer-employee relationships should be preserved at all costs in order not to jeopardize customer loyalty. This may well be important in the case of products that require a high level of support and service, but in many cases the risk of changing customer-employee assignments is no greater than that which companies stand to gain from such a restructuring.

Sales members' residences and assigned locations

In planning sales territory structures, it's vital to take the locations of company and supplier sites into account, as well as the residences of sales force members. Regarding the latter, it is rare that employee contracts allow for reassignments that necessitate a change of private residence.

Sales members' capabilities

Theoretically, all sales force members should carry out the same number of customer visits each day. In practice, though, there are frequently significant variations. Moreover, some employees only work part-time or devote some of their working hours to internal duties. In planning sales territory networks, it's therefore crucial to consider these variables.

Basis of planning

Restrictions on planning already occur at the point of selecting which map is to be used. For example, if a company chooses a map with detail down to the level of municipalities, then, in the case of Berlin, it is not possible to plan on more detailed levels. By contrast, should a company opt for a map with detail at the level of five-digit postal code districts, then Berlin will appear as 190 districts. Naturally, the company in question will very likely only visit customers in a limited number of these districts. All of this is to say that it's very important to give careful thought as to which type of map is best suited to a given company's needs.

Seasonality

In many branches, demand varies significantly according to season. A typical example is chocolate, demand for which rises steadily throughout the fall, reaches a peak at Christmas and then decreases thereafter with a second spike around the Easter period. Any sales/service territory planning must take these fluctuations into account. Another example: schools are closed for more than ten weeks each year, during which there is almost no demand for education-related products such as books. Employees at school book publishing houses typically schedule their vacation for these periods.

Natural barriers

Natural barriers such as mountains, lakes and rivers in areas with limited transportation networks increase the required travel time and place restrictions on the time available for employees to spend with customers. When planning

sales/service territories, these barriers should be taken into account and responded to creatively. For example, the Rhein forms a natural border between Koblenz and Bonn that should ideally be used as part of a sales territory boundary for this region. Of course, the extent to which natural barriers can be adopted as part of a given company's sales territory structure depends upon the number of employees available and the size of the areas to be assigned.

Regional size

Travel time requirements inevitably increase as sales territory sizes grow. Beyond a certain point, overnight travel or accommodation is necessary. A general rule of thumb is that beyond a distance of 80-100 km from the sales member's place of residence, the quality of the customer service s/he is able to provide within the context of a day trip decreases dramatically.



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Michael Büttcher assists companies from all branches of trade in the planning and implementation of sales territory restructurings.

For more information, visit www.gfk-geomarketing.com/territoryplanning.

GfK Purchasing Power By Age Group 2008



The perfect basis for your target group segmentation!

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- 20 to 29 year olds in Berlin have a below average level of purchasing power, which nonetheless amounts to a total of 5.2 billion euros.
- Hamburg only surpasses Munich's purchasing power levels in the senior citizen age group, for whom €2,000 more per person per year is available.

GfK Purchasing Power By Age Group gives you insight into the location of your target groups by providing detailed information at the level of municipalities and postcodes with regard to the distribution of Germany's population according to seven age groups. This offers an excellent foundation for planning and assessing sales territories, catchment areas and turnover potential!



More information at +49(0)7251 9295200
or www.gfk-geomarketing.com/purchasingpower.



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Meet us at SPSS Directions in Athens from May 12-15. The venue is the Athenaeum Intercontinental Hotel.



We will be at MapWorld 2008 in Las Vegas on May 22. This international conference for users of Pitney Bowes MapInfo will take place in Las Vegas' "The Rio" Hotel.



From June 18-19, we'll be at the mailingtagen 2008, the specialty trade fair for direct and dialogue marketing. You can find us in hall 4A at stand no. 111.

Make an appointment by visiting www.gfk-geomarketing.com/fairs !

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

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GfK Data Shop puts German market data at your fingertips

GfK Data Shop (www.gfk-datenshop.de) is the one-stop shop for GfK GeoMarketing's complete range of market data for Germany. There you can browse through our comprehensive consumer and retail market data. It's possible to order market data for individual German municipalities and postcode districts, or for all of Germany.

The following datasets are newly available: GfK Purchasing Power 2008 (Germany), GfK Demographics and GfK Inhabitants and Households.

For any questions related to the GfK Data Shop, please contact Corinna Fleckenstein at +49 (0)7251 9295155 or c.fleckenstein@gfk-geomarketing.com.

Training course dates for RegioGraph and DISTRICT

You can find upcoming training course dates and information on course contents at www.gfk-geomarketing.com/training.

RegioGraph	May 29-30	June 5-6	June 16-17
DISTRICT	May 26-27	June 2-3.	June 12-13
RegioGraph / DISTRICT Advanced-Training	May 14.	June 25	July 23

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Results of the RegioGraph 10 Competition

Do you know the capabilities of the new RegioGraph 10? If you do, with a little luck you could have won a free copy of the software by participating in the contest advertized in our last issue!

The winner is Nicole Buchholz from ING DiBa. Many congratulations!
RegioGraph 10 allows you to easily solve all of the checked tasks indicated below!

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<input checked="" type="checkbox"/> Expansion planning	<input checked="" type="checkbox"/> Defining distribution territories	<input checked="" type="checkbox"/> Defining benchmarks
<input checked="" type="checkbox"/> Location planning	<input checked="" type="checkbox"/> Presentations	<input checked="" type="checkbox"/> Monitoring success
<input checked="" type="checkbox"/> Monitoring the competition	<input checked="" type="checkbox"/> Reports / brochures	<input checked="" type="checkbox"/> Evaluating external sales staff
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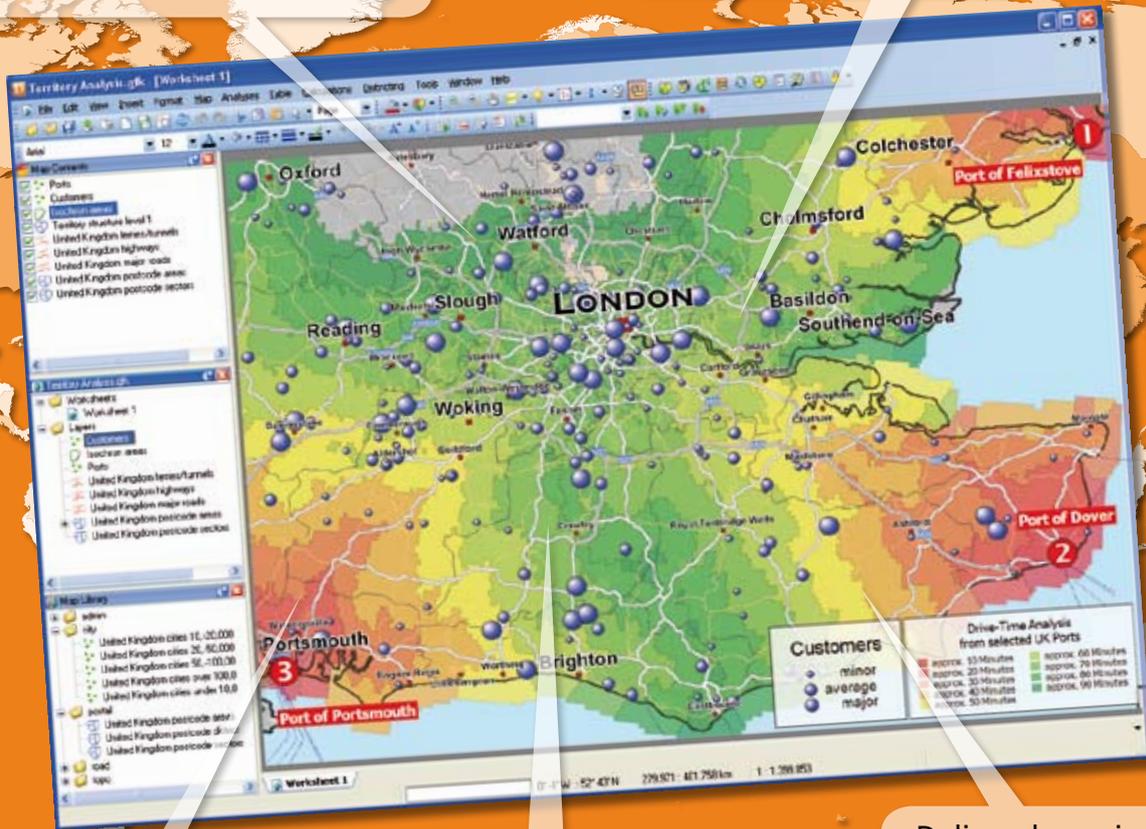
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R RegioGraph 10

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