

GfK

GfK GeoMarketing

News

03|2007

The background of the central section is a photograph of the European Union flag, featuring twelve yellow stars arranged in a circle on a blue field. The flag is slightly wrinkled and set against a clear blue sky.

European Retail Location Guide – An overview of 31 countries and 341 cities

GfK GeoMarketing's European Retail Location Guide offers unparalleled depth and scope in its inclusion of the most important market details for retail trade. In addition, the guide features, for the first time, detailed information on each included country's shopping centers.

Trade shows

Meet us at the Post-Expo in Barcelona from October 2-4, 2007, and at the EXPO REAL in Munich from October 8-10.

Welcome to GfK GeoMarketing News!

Dear Readers,

Do you enjoy performing your own detailed analysis, or would you rather make use of high-quality summaries that outline the most relevant points?

We offer geomarketing solutions catered to either preference. In addition to the GfK Purchasing Power data sets and our highly intuitive geomarketing software, RegioGraph and DISTRICT, we provide a comprehensive range of services and consulting. From customized coaching sessions to market research projects to highly refined location reports, GfK GeoMarketing prides itself on using its vast experience and specialized knowledge in geographical-related issues to deliver a quality service that will equip you with the knowledge needed to meet your business goals.

Our new European Retail Location Guide constitutes an invaluable tool for our clients who have, or plan to have, active business interests in Europe. The collection includes detailed information on key economic factors for more than 341 retail urban centers in 31 European countries. Read more about this product on page 4 of this edition of GfK GeoMarketing News.

I wish you a pleasant and stimulating read!

Dr. Eberhard Stegner
Managing Director, GfK GeoMarketing



Contents

News	New developments at GfK GeoMarketing	3
Location Research	European Retail Location Guide – an overview of 31 countries and 341 cities	4
RegioGraph & DISTRICT	RegioGraph in marketing: On the “tragic” role of the marketing director Tutorial: Give your maps a professional 3D layout	6 11
Digital maps	Branch-specific maps from GfK GeoMarketing	8
Market data	GfK Purchasing Power updates for 61 retail product lines	10
User report	Tailored for success: territory planning in the textile industry	12
Training & Consultancy	Software training – Planting the seeds of growth for your company Coaching: GfK expertise customized to your company	14 15
Webnews	What’s new at www.gfk-geomarketing.com	16
Trade shows	Meet GfK GeoMarketing	18
Masthead		16
Contest	Contest: RegioGraph 10	19

New developments at GfK GeoMarketing



Market data & research under new leadership

Simone Baecker-Neuchl has been heading the market data & research division in Nuremberg since mid-June. She brings more than 10 years of managerial experience in the field of geomarketing and related economic dialogue, with a particular expertise in regional market research and microgeography.



Partnership with Map Mechanics (UK)



Map Mechanics is a service provider for routing, digital maps, GIS software and external sales optimization in the United Kingdom. The company searches the world over for the optimal data, map and software solutions for their clients.

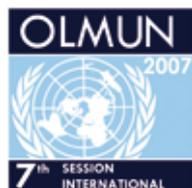
GfK GeoMarketing and Map Mechanics recently established a long-term joint venture in the field of digital maps.

"We're delighted with having established Map Mechanics as our sales partner for Great Britain," said Wolfram Scholz, Managing Director of GfK GeoMarketing. "As a result, we can provide our combined customers in this market the outstanding quality of our global digital maps."

Global CRESTA maps for the re-insurance industry

The Catastrophe Risk Evaluation and Standardizing Target Accumulations (CRESTA) Organization concentrates on insurance related to risk evaluation and coverage for losses resulting from natural disasters. It strives to compile standardized records of natural events such as floods, earthquakes and storms for the purpose of deriving damage probabilities. GfK GeoMarketing is CRESTA's official map supplier. Updates to the 2006 coverage areas are now available. The map package covers more than 5,300 zones and around 510 subzones, as well as national borders for countries worldwide.

For more information, please see page 8.



RegioGraph in use at OLMUN 2007

Students from numerous European countries congregate each year in Oldenburg, Germany to take part in the Model United Nations Conference Oldenburg (OLMUN) in order to learn the inner workings of this organization. Students assume the roles of UN delegates from more than 100 countries in an effort to gain appreciation for

these countries' perspectives on issues such as politics, the environment and human rights. GfK GeoMarketing donates its geomarketing software RegioGraph as well as digital maps in order to provide the conference with graphic illustrations related to the topics discussed.

GfK Purchasing Power for retail product lines

GfK Purchasing Power for 61 retail product lines in both the food and non-food sector has now been updated for 2007. It covers all administrative levels from federal states to counties, municipalities, postal codes and even individual neighborhoods. Companies can use this invaluable data to calculate their sales potential, plan sales territories and locations, and tailor their regional merchandise ranges accordingly.

For more information, please see page 10.

GfK GeoMarketing welcomed to new location

The opening ceremony for our new GfK GeoMarketing offices in Bruchsal, Germany was attended by the mayor, Ulli Hockenberger, and the president of the Business Promotion Association, Ralf Broß

From left to right: Dr. Eberhard Stegner, Ralf Broß, Olaf Petersen, Raimund Ellrott, Ulli Hockenberger, Wolfram Scholz and Christian Reppel.



Careers at GfK GeoMarketing

GfK GeoMarketing continues to solicit applications for positions in our Bruchsal-based sales department and in our Nuremberg-based market data & research department.

If interested, please see our job postings at:

www.gfk-geomarketing.com/career

European Retail Location Guide – An overview of 31 countries and 341 cities

GfK GeoMarketing's European Retail Location Guide offers unparalleled depth and scope in its inclusion of the most important market details for retail trade. In addition, the guide includes, for the first time, detailed information on each country's shopping centers.



"It's hard to believe, but the idea to create a retail location guide for the whole of Europe emerged very spontaneously," says Wilfried Reinhardt, project coordinator and the originating force behind the European Retail Location Guide. "We noticed that our location research projects generated an enormous amount of information on hundreds of European cities. It would have been a shame to hoard this knowledge and draw on it simply for custom studies. Many companies are overjoyed to get their hands on this kind of hard-to-come-by data such as population figures, purchasing power and age demographics."

The guide's second edition has now been published - a sizeable lexicon of around 1,700 pages. Coverage is now available for the countries of Greece, Norway, Finland, Turkey and Cyprus, and the number of cities has expanded from 180 to 341. A further highlight is the inclusion of detailed information on the shopping center scene. Shopping centers are a significant generator of retail trade: retail companies place great stock in the location of shopping centers when expanding into new markets due to the infrastructure, central management, and increased profit potential they provide.

The collection is the product of an enormous amount of research, countless trips and the expertise and years of experience possessed by GfK GeoMarketing's location and real estate researchers. Although the idea of preparing the data for publication came about spontaneously, its realization is the result of methods and statistics that required years to compile, analyze and refine. For each country contained in the guide, you can access information on population figures, number of households, purchasing power, age demographics, retail sales figures, growth rates, shopping center trading areas, and addresses for all large – and most mid-sized – urban centers. These figures are complemented by graphics that illustrate three- and four-year trends while also providing comparisons with the European and country average.

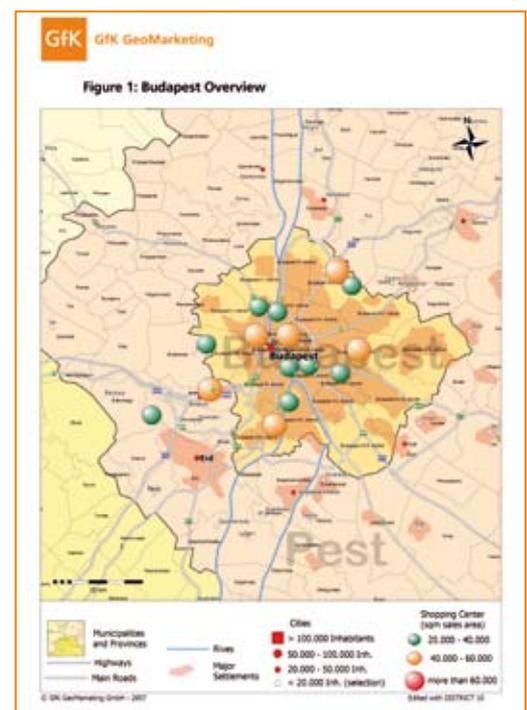
For example, a company wishing to expand its operations to Hungary can learn that:

- ... Hungary's official population for 2006 was 10,076,581.
- ... an average of 2.5 individuals live in each household.
- ... 15.6% of the population is older than 65, while the same percentage is younger than 15.
- ... there was an average of 8,920 EUR gross domestic product per individual in 2006.
- ... the country's economic power is less than half that of the EU average.
- ... just under 45% of consumer spending is in retail – e.g., 12% on clothes and shoes.

... shopping center area corresponds to 87 m2 per 1,000 inhabitants, with a strong tendency upwards.
... the inflation rate is around 4% and the unemployment rate is 7.5%.

The same data is also available for all cities contained in the guide, supplemented by GfK Purchasing Power for various product lines, the GfK centrality index and gross retail sales figures. Also, retail product lines for urban areas are further broken down into the categories of food and luxury articles, clothing and durable consumer goods (technology, household, DIY/garden and furniture). For each city, the purchasing power for these product lines is calculated for 20-, 40- and 60-kilometer catchment zones.

The retail location guide also contains country- and region-specific overview



maps in which the shopping center locations are highlighted. The information related to a given country's cities is supplemented by figures on the most important regional shopping centers. This data includes postal addresses and websites, year of establishment, total area, number of parking spots, number of shops, names of anchor tenants and special features such as movie theaters or available office space.

This valuable information gives companies a tremendous competitive advantage when planning to expand their operations or monitor the status of their existing locations. Market data of this nature – such as the purchasing power figures for retail, centrality and actual retail sales – is not available anywhere else, let alone in such a compact and accessible format.

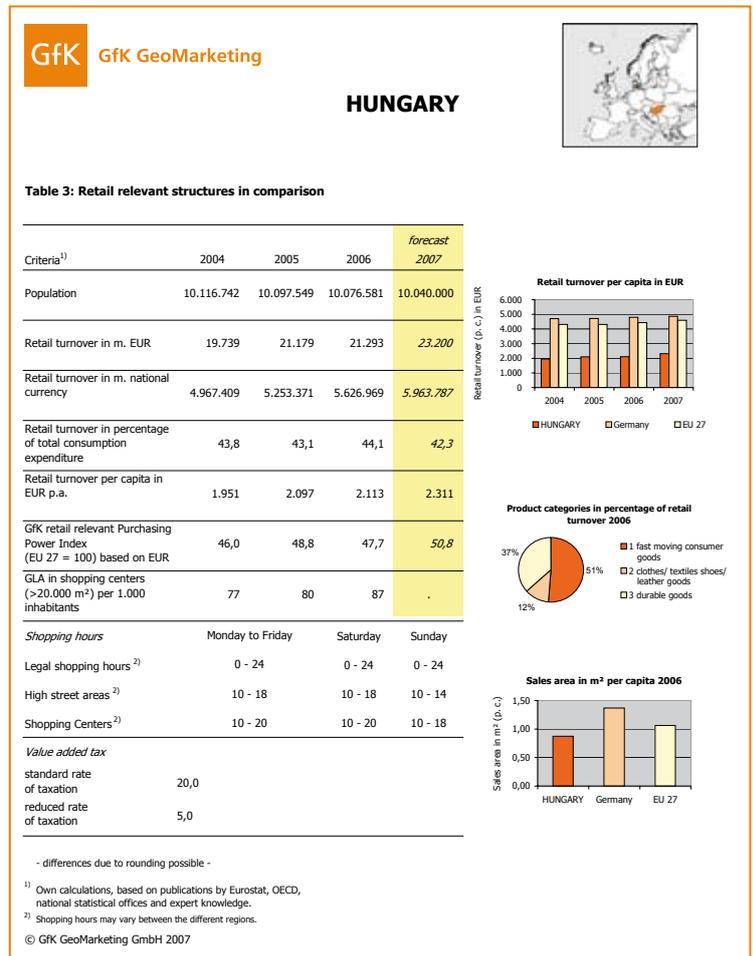
“As part of a trial, we provided country and city location information to customers for whom we were performing targeted location studies,” explains Wilfried Reinhardt. “The customers were so taken by this that they immediately asked for information about other countries as a kind of preliminary step to assist in planning further location studies, and, in one case, to assess the status of an existing location abroad. This result motivated us to make the European Retail Location Guide available to all our customers.”

Our guide provides the ideal orientation for planning business strategies that will yield results in the growing competition for market dominance in European retail locations, providing companies with an unparalleled reference work informed by GfK GeoMarketing's proven expertise. Expansion planners, companies involved in retail trade as well as project developers and investors can use the collection as a reliable tool for making an initial assessment of a possible business location.

Project manager Wilfried Reinhardt offers a humorous commentary on the immense amount of data and work efforts that went into the collection: “Location researchers like to travel – thankfully. If you think that you'd also enjoy visiting the 341 urban centers covered in the collection, then, by all means, go ahead. Europe is certainly worth seeing. Do bear in mind, though, that in view of the over 140 shopping centers in Spain alone, you'll certainly be on the road a while!”

For more information on the European Retail Location Guide, please contact Wilfried Reinhardt at +49(0)40/227112-27, w.reinhardt@gfk-geomarketing.com, or Antje Hille at +49(0)40/227112-34, a.hille@gfk-geomarketing.com.

The European Retail Location Guide is available as of September 2007, and can be ordered as a complete set, or for individual countries.



On the “tragic” role of the marketing director

Hardly any other company operation is more difficult to measure than the success and effect of resources used for marketing purposes. RegioGraph 10 helps to optimize your marketing budget and bring increased visibility to the successes resulting from these investments.

A company’s marketing staff might be said to have it good! While the sales department must generate new sales every day and are evaluated based on these results, marketing, at first glance, appears to have just one task: allocating earned capital to advertising, flyer material, trade shows and mailouts. These kinds of activities are costly, so a marketing director enjoys a significant share of a company’s financial resources. Such a position would seem quite enviable, so wherein lies the “tragedy”?

Precisely because it is so notoriously difficult to measure the success of marketing endeavors, a marketing director is under constant pressure to justify expenditures.

Could more customers have been reached with the same budget?

Of course, as a rule, a newspaper ad or a mailout results in a measurable increase in customer response. Yet the question remains whether this response justified the expenditure, or whether even more customers could have been reached with the same financial resources. Marketing staff often refer to the oft-cited truism that 50% of all marketing efforts are always in vain, but no one can predict which half it is. It is precisely this uncertainty and lack of precise targets that lead many companies to conduct half-hearted and unsystematic marketing initiatives. This particularly applies to many mid-sized businesses in Germany.

Of course, marketing will always be characterized by an element of uncertainty, but we can dramatically improve the precision of your marketing campaigns.

RegioGraph is a highly efficient tool for optimizing the precision of marketing endeavors. This software enhances marketing activities at all levels – from the strategic preparation of a campaign to the measuring of responses. In addition, RegioGraph functions as an ideal medium of communication between a company’s executive, sales and marketing divisions.

A deceptively simple question: How big is the population mean for all potential customers?

The following example provides a case-in-point. A large furniture store in the German state of Westphalia wishes to increase its regional profile through the use of newspaper advertising or direct mass mailouts. Polls have thoroughly established that customers are only willing to travel up to an hour for their shopping needs. From this arises the straightforward



Fig. 1: Pure estimates alone cannot accurately reveal the number and location of potential customers in a given area.

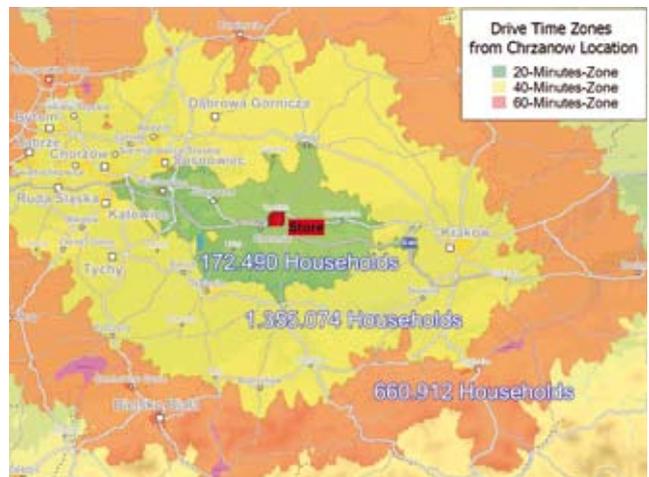


Fig. 2: Only geomarketing software reveals what otherwise remains hidden: the number and exact locations of households and their relative distance from a given point.

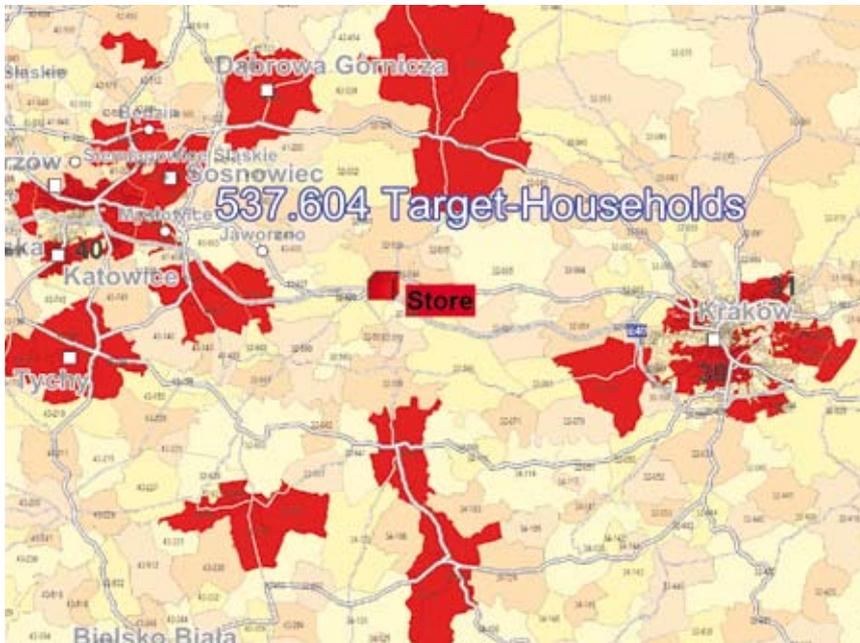


Fig. 3: All maps can be exported with the click of a mouse to PowerPoint, Excel, Word or to the Web, making them easily accessible for meetings, presentations and regional advertisements. Slide shows are also a cinch with RegioGraph 10.

question of how many households exist within a 60-minute travel radius - in other words, how large is the potential customer base? Without a geomarketing system, this question is unanswerable – but, with RegioGraph, it's a breeze.

With just a few mouse clicks, RegioGraph 10 allows you to view the driving times for selected regions. Other data – e.g., population and household figures – are also viewable with a similar level of ease. Only with the help of this data is it possible to derive an accurate “population mean” informed by realistic assumptions about your target groups, growth potential and budget for planned campaigns. Importantly, the user is not bogged down by pure numbers here. The findings can be presented clearly in digital map form, resulting in illuminating insights not otherwise apparent from scrutinizing the raw data alone. For example, presentation of the data in digital map form makes it easy for the company management and others concerned to identify especially suitable regions that have an above-average target group share.

Maps as a medium of understanding between management, sales and marketing

As is often the case, the operative word here is “transparency”. With the above-described approach, a marketing department is not forced to gauge the success or failure of a campaign with hazy estimates. Geographic illustrations of data make it immediately clear which regions delivered the highest response rate – for example, those where mid-level income groups dominate. Assume, by way of example, that in a catchment area with a total of 2.5 million households, you plan a direct mass mailout of 500,000 units. RegioGraph-generated maps make it easy to determine which districts most closely correspond to this pro-

file. Also, the graphic interface and resulting visualizations make it easy to coordinate any planned endeavors with the company management.

The “aha effect” instead of gut instinct

For the marketing director of the furniture store referred to previously, this improved marketing approach has the following advantages:

- Estimation of a concrete sales figure generates confidence, draws attention to untapped potential and corrects unrealistic expectations.
- Risks and opportunities can be visualized together, revealing, for example, the locations of competitors. This can illuminate why various areas produce fewer or more customers.
- Finally, this approach enables him or her to develop measurable action plans. As every marketing budget is limited, it makes sense to concentrate resources on specific regions. If these more targeted efforts result in a response increase from 1 percent to 1.5 percent, then this could correspond to 75 instead of 50 new customers!

In short, the same marketing budget can generate more customers through a more precise market development strategy. As a result, marketing directors shed the status of “tragic figures,” becoming acknowledged key players in a company’s collective attempts to advance its development through innovative direct marketing, transparent media planning and the monitoring of success.

Branch-specific maps from GfK GeoMarketing

Made by experts, for experts – from AVON to Xponent – GfK GeoMarketing offers specialized digital maps for many branches of industry. The pharmaceutical and re-insurance industries also rely on the world's largest producer of digital administrative maps.

Worldwide CRESTA maps for the re-insurance industry

The Catastrophe Risk Evaluation and Standardizing Target Accumulations (CRESTA) Organization concentrates on insurance related to risk evaluation and coverage for losses resulting from natural disasters. It strives to compile standardized records of natural events such as floods, earthquakes and storms for the purpose of deriving damage probabilities. Provided CRESTA with maps since 2002 – broken down into zones and subzones – GfK GeoMarketing is CRESTA's official map supplier. Updates to the 2006 coverage areas are now available. The map package covers 5,316 zones and 510 subzones, as well as national borders for countries worldwide.



A universal standard is required for the purpose of natural catastrophe

damage control; risk models are needed in order to calculate the intensity, range and probability of occurrence of such events. Country-specific zones are identified in CRESTA maps to facilitate standardized and detailed risk assessments for natural catastrophes. Today's international insurance companies regard these maps as the industry standard.

More information available at www.gfk-geomarketing.com/cresta and www.cresta.org

Xponent Structures 2007 for the pharmaceutical market

GfK GeoMarketing has produced maps for the current IMS Xponent Structures 2007. Maps are divided into so-called bricks, each of which corresponds to an area in which a minimum of six physicians from the same medical specialty have their practice. This division into bricks is not always carried out according to the geographical distribution of medical practices, but rather at times is structured on the basis of alphabetically-ordered street names.

GfK GeoMarketing offers the new Xponent maps and numerous other branch-specific maps in the common data formats. For questions, please contact Friedlind Dürr at +49 (0) 72 51 / 92 95 - 230 or f.duerr@gfk-geomarketing.com

Xponent maps are available for the following medical specialties:

- Ophthalmologists
- Surgeons
- Gynecologists
- Ear, Nose and Throat Specialists
- Dermatologists
- Internists
- Pediatricians
- Neurologists
- Neurosurgeons
- Orthopedists
- Radiologists
- Urologists
- Nuclear Medicine Specialists
- Physiotherapists
- Rehabilitation Specialists
- General Practitioners



Xponent-Structure for general practitioners in Berlin

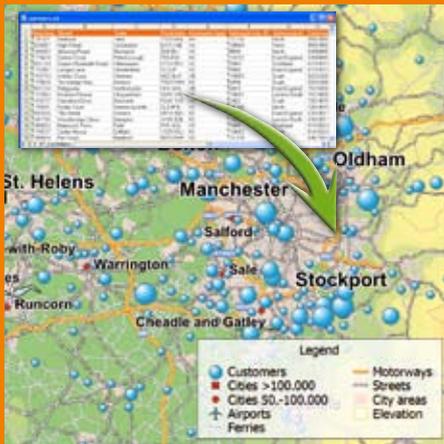
R RegioGraph 10 –

New software version!
for all Microsoft operating
systems later than 2000,
incl. Windows Vista

Better business decisions through geographical analysis

R RegioGraph 10 makes regional market analyses a cinch. Marketing campaigns, sales support or controlling – RegioGraph shows you WHERE your potential lies.

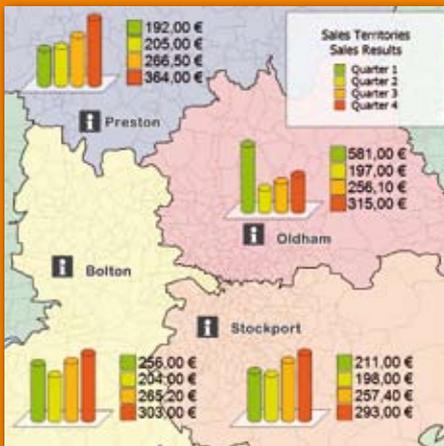
1



IMPORT DATA

Display your branches and customers on digital maps. Discover clusters or gaps!

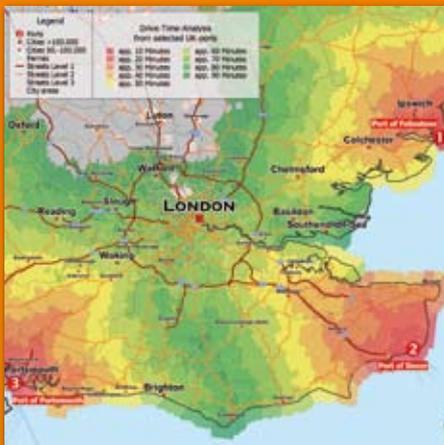
2



ANALYZE

Visualize your sales results! Or plan mailouts to where your target group is located. Discover new market potential!

3



EXPORT & PRESENT

Share your insights with colleagues or management and convince and impress. Just don't tell them how easy it is!

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GfK GfK GeoMarketing

GfK Purchasing Power® updated for 61 retail product lines

Are you aware of where in Germany the spending potential for automobiles or tea is highest? Knowing the purchasing power for individual merchandise groups in specific locations can win you a decisive competitive edge.

Germany's population has a total of 1,488 billion euros available for consumer spending in 2007. Around 30% of this amount – 451 billion euros – will be spent on domestic retail purchases.

It is common knowledge that a higher than average amount of beer is consumed in Bavaria and a similarly higher than average amount of wine in Hesse. Yet, the significant variations in consumption levels within these regions is not as apparent at first glance. Consequently, it is important that product line marketing and distribution strategies take these regional differences into account.

In order to do this, you need not only experience, but also objective market data. GfK GeoMarketing provides this with its updated 2007 edition of GfK Purchasing Power® for retail product lines, which includes specific purchasing power figures for 61 product lines representing the key sectors of the retail market. This data package enables you to target your sales and marketing strategy according to regional spending habits, thus giving your company a decisive competitive advantage.

Direct marketing

By knowing the location of regions with the strongest purchasing power for a specific range of merchandise, you can tailor your marketing endeavors accordingly, resulting in savings in both time and money.

Product line management

You can analyze the extent to which your company is tapping into a region's market potential for a certain product line by comparing your sales figures with the corresponding GfK purchasing power figures. As a result, you can better assess, plan and optimize your product line and sales space positioning for specific regions.

External sales control

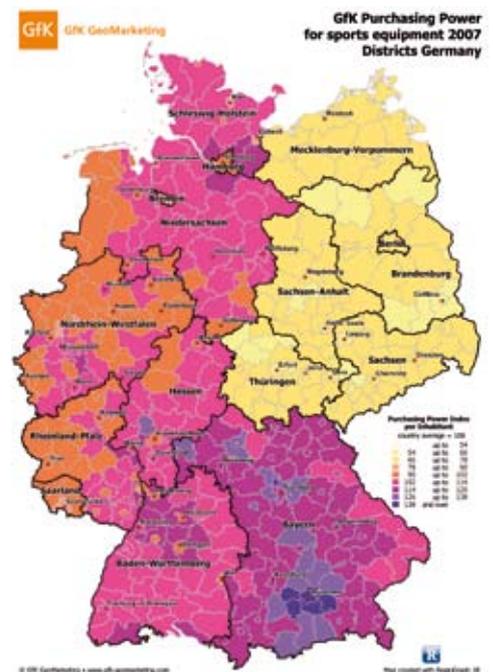
With the help of regional purchasing power figures, it's quick and easy to identify new sales territories that offer comparable levels of success to your existing territories.

Sales planning and control

Comparing GfK Purchasing Power® figures for your product lines with your company's actual sales figures for a specific region provides a basis for analyzing your company's strengths and weaknesses, allowing you, for example, to concentrate your sales activities where they are most likely to bear fruit.

Evaluating sales team performance

Comparing GfK Purchasing Power® for retail product lines with your sales team results is a useful basis for evaluating performance.



Location planning and evaluation

By using GfK Purchasing Power® to assess potential demand for a specific product or range of merchandise according to region, you can identify locations across Germany where it is most worthwhile to open a new store.

GfK Purchasing Power® for retail product lines is available for all regional levels, from municipalities to 5-digit postal code areas and even down to the level of street segments.

For further information, please contact Doris Hardt-Beischl at +49 (0) 72 51 192 95-140 or d.hardt-beischl@gfk-geomarketing.com.

Tutorial: Give your maps a professional 3D layout

With its newly published 3D relief map, GfK GeoMarketing offers RegioGraph 10 and DISTRICT 10 users yet another attractive design option. Here we'll show you how to make the most of these powerful maps.

What is a 3D relief map?

Cartographers use various techniques to produce the illusion of three dimensions in two-dimensional media such as paper maps or computer screens. RegioGraph and DISTRICT users have long been familiar with one of these techniques – namely, the color-coded elevation layer (see fig. 1). This approach designates variation in elevation by assigning colors to the displayed surfaces according to their relative heights..

A second, more sophisticated, approach is that which employs so-called "shading" effects through the use of light and shadow. Utilizing a digital elevation model, the angle and degree of inclination for a given topography are calculated. By assuming the presence of a light source above the map, the individual map areas are assigned shades ranging from white to dark gray depending on the inclination and orientation. This creates the impression, for example, that one side of a mountain is illuminated, while the other side lies in shadow (see fig. 2).



Fig. 1: Conventional elevation map



Fig. 2: 3D relief map

How to locate the 3D relief map feature in RegioGraph 10 and DISTRICT 10

GfK GeoMarketing's cartography experts have created 3D relief maps for Germany, Austria and Switzerland in the form of a ready-to-use layer. You can download these layers free of charge from the **customer section** of **GfK GeoMarketing's website**, or by entering the following web address into your browser:

www.gfk-geomarketing.de/schummerung

Using the 3D relief map layer

The 3D relief map layer provides a shaded impression of a region's topographic features. The layer is intended to play a complimentary role. Ideally, the layer should be used in conjunction with a semi-transparent application of the conventional color-coded elevation layer for a specific geographic region – for example, your sales territories (see fig 3). To do this, follow these steps:

1. After installation, locate the 3D relief map function as a layer in your **Map Library**. Drag it to a new or existing project. The layer will automatically be applied to the map with the correct color values.
2. You can also drag **additional territory layers** onto the workspace – e.g., your sales territories, federal states or administrative districts.
3. Go to the **Format** menu and select the option **Color Distribution**.
4. Choose three to four different **semi-transparent colors** by double-clicking on the corresponding areas of the color palette (i.e., the three lowermost rows of the palette).
5. When finished, click **OK**.

The geographical regions on your workspace should now display variations in both colors and relief shading (see fig. 3).

Additional tutorials can be found online at:

www.gfk-geomarketing.com/tutorials



Fig. 3: Combined sales territory and 3D relief map

Tailored for success: Territory planning in the textile industry

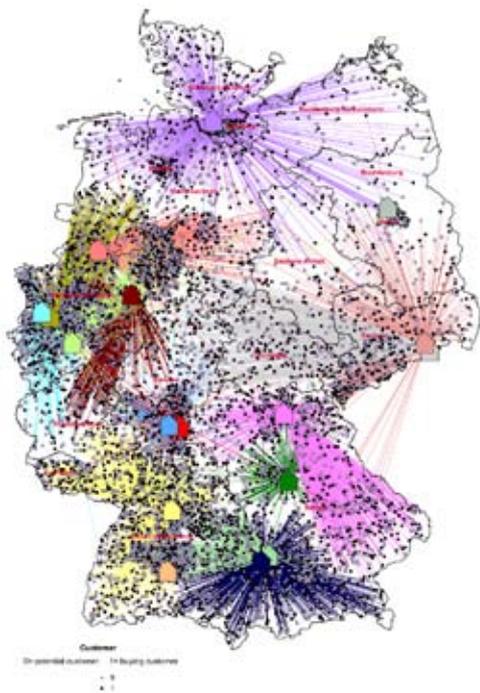
While some criteria for optimizing territory structure can vary from branch to branch, certain fundamental principles hold across the board. DISTRICT provides comprehensive support in this regard, as Anne Schroeder shows in her university dissertation

The motivating reason behind she examined textile company's need for territory optimization was the retirement of several sales representatives. Anne Schroeder, a business student at the University of Cooperative Education in Stuttgart, chose to focus on this restructuring in her dissertation, for which she found GfK GeoMarketing's territory planning software, DISTRICT, invaluable.

"As part of my thesis, it was necessary to shed more light on the concept of sales territory planning," says Anne Schroeder. "With reference to the existing sales territory structure, my goal was to devise a restructuring plan that took into the account the various needs and characteristics of the company. Working together with the textile company provided me with a practical starting point and a specific aim to explore. DISTRICT's practice-oriented design was instrumental to the successful completion of the project."

The initial focus of the thesis was an analysis of the existing sales territory structure.

"Theoretically, an optimized analysis of a company's sales, territory and market data plays a decisive role in its chances of success. My research confirmed that this holds true for the textile company, demonstrating as well that much of the aforementioned data varies significantly according to location. Territory planning software such as DISTRICT is indispensable in preparing a region-specific marketing analysis, particularly in the case of a company with a sales department."



Before optimization: DISTRICT reveals many overlaps in customer representation.

The task was clear: optimize the sales territories by adapting them to the parameters of the regions in question, such as the number of actual customers and potential customers, past sales figures, concentration of customers, sales and marketing potential and the location of sales teams and customers.

Implementing the project with DISTRICT, Part One – The Analysis:

With the help of GfK GeoMarketing's 5-digit postal code map, the company's customer data could be visualized and analyzed. This made

it possible to identify where the sales representatives lived and operated, in addition to the routes they traveled to and from customer locations.

The distribution of current and potential customers within the German sales regions also became clear, as did the distribution of customers according to size-based categories. This visualization facilitated the identification of especially strong sales territories, as well as several aspects of company operations that could be improved, including, most critically, overlaps in the driving routes of the sales representatives.

Implementing the project with DISTRICT, Part Two – New Planning:

The defined goal for the subsequent restructuring was as follows: A clear structure should be created allowing the best customer service possible for the lowest possible cost.

The 5-digit postal code areas of Germany were used as a starting point for optimizing the service areas. The demarcation of postal code areas was departed from only in those instances in which not doing seemed disadvantageous to the business. It was important to guarantee that existing customer relations would not suffer from any effects of the restructuring. The aim was to ensure that the new structure resulted in medium- to long-term continuity with regard to customer contact partners.

Care was also taken to create sales territories whose size and structure permitted the full utilization of the company's existing sales staff. Regi-

onal cultural and linguistic variations were also taken into account. Additionally, the drafting of sales territory boundaries considered the locations of the sales staff's homes in order to avoid long drives and overnight stays. Finally, attention was given to the relative skills and abilities of the sales staff.

"Only by using the territory planning software DISTRICT was it possible for me to perform this kind of analysis and territory planning," Schroeder explained. "The geographic relationships connecting addresses, cities and sales territories were illuminated through the visualization of the data. As a result, strengths and weaknesses could be identified more easily, enabling the creation of a more streamlined business structure."

"The software also allowed me to present my project results to my thesis supervisor at my university in Stuttgart in a very convincing fashion. DISTRICT was thus a key factor in the success of the territory optimization and my academic endeavors."

The textile industry has been in continual flux for more than 30 years. The textile industry is a "nomad" in the processing and production sector. Due to the high intensity of labor resources in the sewing sector, processing and production sites are frequently chosen according to the level of wages offered in the respective regions. Many companies have outsourced much of their labor from Western Europe to Eastern Europe, as well as to Asia in a persistent effort to lower wage costs and raise profit margins. Developing new markets in these regions is regarded as equal in importance to the establishing of sales staff closer to home. In many cases, the executive and administrative headquarters for these companies remain in industrialized countries such as Germany.

For further information on the thesis, please contact:

Anne Schroeder, schroederanne@gmx.de

You can find more information on DISTRICT at:

www.gfk-geomarketing.com/district

Need a boost?

Software-Training New Features of RegioGraph and DISTRICT

Are you a user of an older RegioGraph or DISTRICT version? Do you feel you could do with some brushing up? Get to know the new functions of RegioGraph and DISTRICT in only one day in one of our trainings for advanced users!

Our software training gives you

- many exercises from practice for all kinds of geomarketing sales tasks
- complementary hand-outs including a CD-ROM with all exercises
- good learning environment in small groups (max. 7 participants)

Online booking at www.gfk-geomarketing.com/training
or call +49 (0) 72 51 / 92 95-140

Software training – Planting the seeds of growth for your company

Employee training is not a luxury, but rather a vital investment that yields dividends in regard to company productivity. Guided by a proven training concept, GfK GeoMarketing's RegioGraph and DISTRICT seminars deliver knowledge drawn from real-life practice.

"If I had only known sooner how easy it was, I would have saved myself a lot of work!" As a seminar leader, I regularly hear this statement from our participants. When a software application is well designed, you can quickly find important functions through trial-and-error, but only a formal training session can systematically unlock the full potential of a program. Even more important is that a training course teaches you how to work productively with a new technology.

GfK GeoMarketing's seminar team trains you with precisely this aim in mind. Within small learning groups, we start right where most of our users find themselves: adrift amidst a mountain of data comprised of customer addresses, sales information or reports. We show you how you can bring this information to life in just few steps, assembling it in such a way that hitherto unseen relationships become apparent. After just a few hours, you will have a good idea of where your company's gaps lie – whether in specific regions, Germany or all of Europe – and thus an insight into where resources can best be allocated in order to provide an increase in sales. Many participants later tell me that this is what created a huge "aha" effect for them during training.

GfK GeoMarketing's software seminars avoid unnecessary technical terminology or jargon. Instead, we place great importance on teaching you the basic features and concepts of our geomarketing software applications, RegioGraph and DISTRICT. Questions we'll help you answer include: What is a layer? What is the relationship between map contents and data tables? How can the

information that's generated be implemented concretely into company activities?

Based on my experience, participants return to work highly motivated. Previously laborious tasks suddenly become a cinch. And much more importantly, the new ideas generated by the training often lead to innovations in customer service, sales controlling and internal company reporting.

We'd be happy to invite you to our training center in Bruchsal. Located between Heidelberg and Karlsruhe, the "wine and technology region" is easily accessed. Bear in mind, that company management is normally very interested in advancing the qualifications of their employees. A RegioGraph or DISTRICT training session is an investment in your company, your employees and your own employability that pays quick dividends.

Author:
Patrick de la Chau, Seminar Leader
www.gfk-geomarketing.com/training



Seminar leader Patrick de la Chau during a software training session

Comments of our training participants:

"In a two-day session, we were trained in DISTRICT's most important functions in a very efficient, intensive and professional manner. The well-chosen examples taken from actual practice served to drive home the key points very quickly."

Thomas Fischbeck,
HERMES Pharmaceuticals

Coaching: GfK expertise customized to your company

The consultants at GfK GeoMarketing directly pass on their expertise to you during coaching sessions. The goal is to come up with concrete solutions for specific issues related to territory planning or geomarketing in the space of one to two days.

“Business consulting” – this term conjures up an image of a comprehensive company analysis lasting weeks on end and coming with a six-figure price tag. While GfK GeoMarketing does indeed provide comprehensive project studies for well-known companies, this is but one among the many consulting services we offer.

Usually, geomarketing consulting deals with an analysis and implementation of a specific company process. GfK GeoMarketing specializes in precisely this area and offers consulting plans tailored to this particular need. In a one- to two-day consulting, or coaching session, we show you how to find solutions through the use of geomarketing software and the resulting data.

“What our customers often need is help in quickly implementing a sales territory analysis”, says Andreas Elble, a GfK GeoMarketing consultant. “This often involves questions such as, “How do I objectively compare my sales figures with market data?”, or “How can I automate the compilation of monthly sales territory reports?” These are examples of typical issues that Andreas Elble solves through direct dialogue with the user within the course of a single day.

The goal of a coaching session is to provide a user with a geomarketing specialist who advises him or her on the methods and concepts of geomarketing with reference to the company’s own data, and who then offers help in the implementation of these methods with the assistance of the software. Coaching sessions pick up where the services of a group training session end by applying general geomarketing skills and techniques to your company’s unique needs and goals.

The attractiveness of this kind of consulting is that it occurs within a very short, pre-specified timeframe, produces measurable results and can be provided at a reasonable cost. This is a service that should also greatly appeal to small- and medium-sized companies looking for quality geomarketing solutions that can be implemented quickly and cost-effectively.

If your company uses business-GIS such as RegioGraph or DISTRICT, a coaching session can illuminate the software features that are especially relevant to your specific business needs and company structure. These sessions will make use of your own company’s data so that you’ll be better able to deal independently with any future geomarketing issues that arise. Whatever your concern – customer analysis, market analysis or sales potential analysis – we’ll give you the competency to get where you want to go.

www.gfk-geomarketing.com/coaching

Your partner for territory planning



“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 of your company’s success!

GfK GeoMarketing has optimized the sales and service territories for over 2,000 companies, in Germany and internationally. Use the knowledge of GfK GeoMarketing’s experienced consultants to make your sales territories a complete success!

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

For more information on GfK GeoMarketing consulting services please call +49 (0) 72 51 / 92 95 - 140

What's new at www.gfk-geomarketing.com



Light and shadow effects using 3D relief

You can now download the 3D relief map layer for Germany, Austria and Switzerland for your RegioGraph 10 or DISTRICT 10 software. These maps enhance existing maps by applying light and shade effects based on topographic elevation. Give your maps a more contoured, three-dimensional look!

Download available at www.gfk-geomarketing.de/schummerung. You can also access a tutorial on the optimal color settings for the 3D relief map layer at www.gfk-geomarketing.com/tutorials or on page 11.

GeoMarketing news and expertise by email: GfK GeoMarketing e-News

Stay updated with GfK GeoMarketing e-News. After a one-time online registration, you will receive current information and exclusive tips by email each month.

You'll receive the latest news about current maps, market data, location research and RegioGraph and DISTRICT. Also, each month we offer our subscribers a free map for download, which displays current European market data. Register today at www.gfk-geomarketing.com/newsletter.

Training course dates for RegioGraph and DISTRICT

In just 2 days, you can learn all about RegioGraph and DISTRICT functions quickly and efficiently. Using numerous practical exercises, our experienced instructors will show you the basics as well as some professional tricks for generating geomarketing solutions. Exploit the full potential of your company's data and save valuable time!

Current dates:

Available course dates and information regarding course content can be found at www.gfk-geomarketing.com/training.

Do you have any questions about our training sessions? Doris Steffen would be happy to help you! Call +49(0)7251/9295-180 or email d.steffen@gfk-geomarketing.com.

Tel. +49(0)7251/9295-180 oder E-Mail: d.steffen@gfk-geomarketing.com



Sneak Preview: Aerial view plug-in for RegioGraph 10 / DISTRICT 10

A soon to be released plug-in will offer a bird's eye perspective feature that will allow you to create your own route fly-overs in RegioGraph and DISTRICT! This new, dynamic presentation feature is bound to impress your audience!

You can now view samples of the new flight plug-in at

www.gfk-geomarketing.com/flyover. Version 10 users will shortly be receiving additional information on downloading and installing the plug-in.

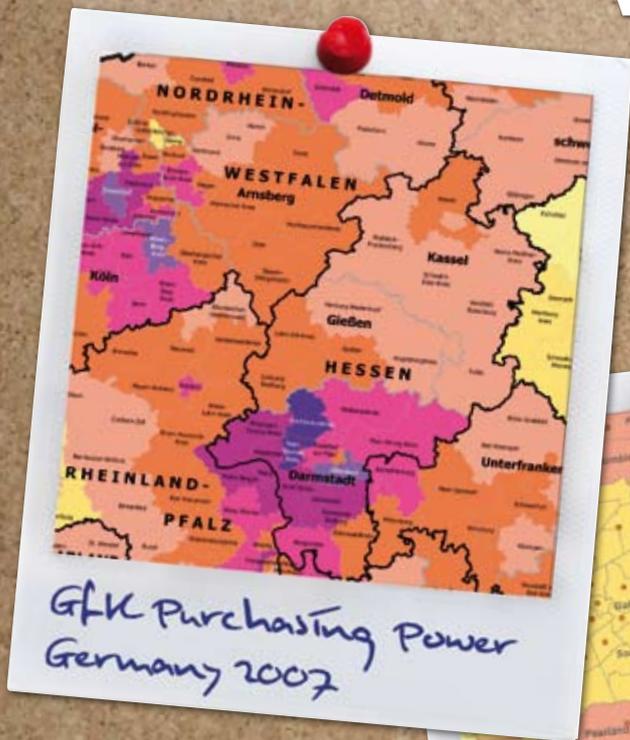
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GfK GfK GeoMarketing

Trade show dates

Learn about our geomarketing solutions and GfK GeoMarketing's services in person by visiting us at an event near you!

We'll be presenting our products and services live, providing answers to your questions about how to use geomarketing at your company.

- Get to know the new geomarketing software RegioGraph 10 and DISTRICT 10.
- Discover the many uses of the GfK Purchasing Power
- Take a look at our global maps and current market data.
- Learn more about our consulting services for location and sales territory planning.

Book your appointment today! Register online at www.gfk-geomarketing.com/fairs or call Doris Hardt-Beischl at +49 (0) 72 51 / 92 95 -140.

Post-Expo, Barcelona, October 2-4

Post-Expo is the meeting place for all companies worldwide involved in postal services, shipping logistics and courier services. The three-day trade show attracts around 4,000 top decision-makers from around 100 countries each year.

You'll find us at booth 1114.

EXPO REAL, Munich, October 8-10

EXPO REAL is the trade show for location and real estate issues. Book an appointment to discuss your particular issue or your real estate or expansion project directly with us at the trade show: Call +49 (0) 40 / 227 112 - 100 or email nuernberg@gfk-geomarketing.com.

Pharma Sales Force, Berlin, October 22-25

This year's convention addresses structural changes in the German health care system. In particular, marketing and sales structures must be adapted to the new conditions. GfK GeoMarketing can show you how our RegioGraph 10 and DISTRICT 10 software can help you do this. The convention takes place at Berlin's Grand Hotel Esplanade.



Stand von GfK GeoMarketing auf der Sales Prof 2007

CRM-expo, Nuremberg, November 7-8

The CRM-expo presents solutions to finding and keeping customers. Over two days, visitors will be presented with comprehensive information on strategies, concepts and trends in the field of customer relations management. GeoMarketing aspects of this issue can contribute decisively to your company's success.

GeoMarketing Benchmark, St. Augustin near Bonn, November 27-28

At this event, leading companies in the geomarketing sector will be showing off the ability of their software applications to come up with solutions to scenarios developed by Fraunhofer IAIS. The scenarios involve typical geomarketing issues such as market analysis, location planning, buyer analysis, sales controlling and district planning.

Last year, GfK GeoMarketing (with its DISTRICT software) was the only company to solve all the assignments. This event also gives you an opportunity to discover in detail the solutions, methods and software tools employed by

GfK GeoMarketing and other providers through interactive workshops.

If interested in participating, please contact Doris Hardt-Beischl at d.hardt-beischl@gfk-geomarketing.com or by phone at +49(0) 72 51 / 92 95 - 140.

A videocast of the 2006 event can be found at:

www.gfk-geomarketing.de/benchmark

Contest: RegioGraph 10

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

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

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

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The winning name will be drawn from all correct entries. Only one submission per person. The judge's decision is final.

Shared GeoMarketing Knowledge is Doubled GeoMarketing Knowledge!

If your colleague is always borrowing your edition of GfK GeoMarketing News, then why not send him a copy of his own!

Simply photocopy this page and fax the completed form to

+49 (0) 72 51 / 92 95-290

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



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GfK European Retail Location Guide 2007

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Lions
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