



GfK

GfK GeoMarketing

News

03 | 2008



Check out our new website at
www.gfk-geomarketing.com!

Independent and reliable real estate and location consultancy

GfK GeoMarketing provides expert location and real estate consulting throughout Europe. We enjoy an excellent reputation thanks to our specialized knowledge and experience as well as the proven reliability of our experts' advice.

Other topics in this issue:

Micromarketing, new maps for Asia, sales territory planning, user reports...

Trade fairs

Meet us at the POST-EXPO in London from September 30 to October 2, 2008 at stand 1240.

Free poster inside!

This edition's poster features the sales potential for office-related supplies as well as Germany's top 10 retail locations.

Welcome to GfK GeoMarketing News!

Dear Readers,

Do you sometimes take your work with you when you go on holiday? We all know we should just focus on the holidays and leave the office behind, but this can sometimes be hard to do. Location and real estate consultants often find themselves assessing the infrastructure and transportation network of whatever town in which they are vacationing, estimating the amount of money the locals and tourists spend on retail-related purchases. Of course, when GfK GeoMarketing experts do this while on vacation, it's for pure pleasure – a means of keeping our minds in gear. But when it comes to executing a proper location appraisal, we proceed much more methodically and thoroughly, carrying out surveys and calculations according to numerous criteria and scenarios.



Europe-wide on-site evaluations comprise a fundamental element of GfK GeoMarketing's location and real estate consulting. We deliver an independent, unbiased perspective that draws on many years of experience with locations and real estate projects throughout Europe.

This edition highlights why our consultancy services are favored by so many clients, from retailers, banking institutions and investors, to public authorities and project developers. The real estate sector, while exciting, is not risk-free. This underscores the important role played by our thoroughly researched appraisals and consultancy services, giving you peace of mind and a legally sound basis for planning. With GfK GeoMarketing on your side, you can relax and enjoy your holidays – leave the number-crunching, risk evaluations and market assessments to us. Over the years, we've guided countless clients to sustainable success, and we'd love to do the same for you!

Enjoy this edition of GfK GeoMarketing News!

Sincerely,
Olaf Petersen
Management Board, GfK GeoMarketing

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New at GfK GeoMarketing

GfK Office Supplies Potential

GfK Office Supplies Potential 2008 is now available, giving you the latest figures on regional market potential for office-related supplies, including computers, software, telecommunications, mobile communications, printers, copiers and organizational aides.

This invaluable dataset provides companies who manufacture, service and/or deliver office-related products the ability to optimize their sales strategies, giving them a decisive competitive advantage.

The GfK Office Supplies Potential dataset contains information at the level of five-digit postcodes and municipalities for all of Germany in per mill values. These figures directly correspond to the number of workplaces within a given region. This allows companies to discover the areas of highest potential and evaluate and position their regional sales teams accordingly.

For more information, visit www.gfk-geomarketing.com/office_potential or call Alexandra Deutsch at +49 (0) 7251 9295170.

Purchasing Power Europe 2008/2009

There's a new top-ten line-up in this year's GfK GeoMarketing purchasing power rankings for Europe:

Country	Purchasing power per person in €	2008 ranking	2007 ranking
Liechtenstein	44,878	1	1
Luxembourg	28,192	2	2
Switzerland	26,842	3	3
Norway	25,165	4	5
Ireland	22,540	5	6
Denmark	21,673	6	7
Iceland	21,202	7	4
Austria	20,045	8	9
France	19,525	9	10
Germany	18,734	10	11

Iceland and Great Britain lost the most ground: Iceland fell from position 4 in 2007 to position 7 in this year's rankings, while Great Britain dropped from position 8 to position 11.

A detailed calculation of purchasing power, population and households for all of Europe's municipalities and postcodes is expected to be released by the end of November 2008. However, 2008 data for individual European countries will be available sooner.

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

Job vacancies at GfK GeoMarketing

GfK GeoMarketing is seeking qualified candidates for positions in real estate consulting, sales, market data & research and software development. Detailed job descriptions can be found at www.gfk-geomarketing.com/careers.

Consultancy for public authorities: Retail concepts for the city of Straubing

GfK GeoMarketing recently presented a city development and retail appraisal during a special session of the Straubing City Council. The message: Straubing's existing shopping centers should be strengthened and expanded.

Straubing's retail infrastructure boasts a sales area of 204,900 m². Despite this impressive figure, further growth and innovation are still possible. GfK GeoMarketing researched retail concepts for the city as well as the quality of the existing retail and convenience store network.

To learn more, contact Thomas Schwarzmann, the study's director, at +49 (0) 911 395 2509 or t.schwarzmann@gfk-geomarketing.com.

For more about GfK GeoMarketing's appraisal methodology, see page 15.

Order paper maps online at the GfK Map Web Shop

Paper maps featuring purchasing power, administrative boundaries and many other elements can now be ordered online from the GfK Map Web Shop, a joint venture between GfK GeoMarketing and the Bacher Verlag.

Browse through the shop's offerings at <http://gfk.en.mapshop.info>

For more information about the Web Shop or GfK GeoMarketing's supply of maps, please contact Alexandra Deutsch at +49 (0)7251 9295170 or a.deutsch@gfk-geomarketing.com.

Independent and reliable real estate and location consultancy

GfK GeoMarketing provides expert location and real estate consultancy services throughout Europe. Our appraisals and recommendations are highly regarded thanks to our specialized knowledge and experience as well as the proven reliability of our advice.



The customers' needs are always paramount. And precisely for that reason, sometimes we have to steer them away from projects that our research reveals would be unlikely to enjoy success. Occasionally this is because a given location isn't suitable for the intended use. Or sometimes a real estate object – although ideal for the present – does not promise to achieve sustainable profit or growth.

Only unbiased appraisals and consultancy services ensure sustainable success

As consultants, it is our duty to assess whether a project is likely to enjoy sustainable success. After all, what's the use of recommending a course of action that's simply not likely to win the acceptance of customers or pass the building approval process? In short, our clients have every right to expect our expert opinion on a legally sound course of action with the best chances for long-term success and profitability.

GfK GeoMarketing delivers this service based on its wide-ranging experience in successfully assisting clients from all branches of trade. Our client list is continually expanding and diversifying, giving us first-hand, on-the-ground knowledge of sites throughout Europe as well as of virtually any business sector. We have direct access to an extensive collection of the latest market data thanks to our parent company GfK, the world's fourth largest market research institute with a global network of more than 9,000 employees and 100 subsidiaries.

Legally sound recommendations

Public authorities frequently ask us to assess the feasibility of their land development and investment plans. We supply all of our clients – who range from project developers and investors to retailers and entrepreneurs – with precise information on the cost-effectiveness of their proposed projects, taking into account their entire branch network and scope of operations, their competitors and many other factors. For example, Europe-based projects are frequently required to prove that they will fit harmoniously into the existing environment. Our appraisals give extensive consideration to this issue.

Compatibility is a particular point of concern for public authorities, because they are charged with ensuring that new developments mesh well with existing public structures and spaces. We therefore assess how projects will affect inner-city commerce, ambience and convenience store networks as well as nearby municipalities and neighborhoods.

GfK GeoMarketing is uniquely suited to this task, thanks to its immense knowledge of diverse retail structures, region-specific building regulations and compatibility issues.

Our appraisals and consultancy services consequently enjoy a superb international reputation and are even accepted as authoritative by courts of law.

Our name is synonymous with quality...Europe-wide

Most of our clients seek our help at the beginning stages of their planning. This has the obvious advantage of saving them a lot of money – and sometimes their reputations – should it turn out to be unadvisable to continue with a given project. If our appraisal gives a green light for proceeding, clients can begin the implementation process with peace of mind and the additional benefit of expert recommendations.

These recommendations are always based on extensive reviews of the latest data, on-the-ground site assessments, a wide range of analyses and a well proven methodology. We provide in-depth advice regarding a project's long-term compatibility and financial sustainability. We also frequently advise companies and public authorities regarding the development and implementation of new retail concepts.

Europe-wide, our name stands for high-quality location and real estate consultancy. Our clients come from diverse countries and business areas, and we're proud of the fact that they continually place their trust in GfK GeoMarketing's appraisals and recommendations. Our interdisciplinary experts and consultancy team have many years of experience and consistently deliver client-customized appraisals. Our proven objectivity attracts and benefits all our clients, providing a reliable basis for making important business decisions and maximizing chances of success.

For more information on our location appraisals and consultancy services, please visit www.gfk-geomarketing.com/consultancy.

If you'd like to talk about our options, Doris Steffen would be happy to advise you. She can be reached at +49 (0)7251 9295190 or d.steffen@gfk-geomarketing.com.



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Facts about GfK GeoMarketing's location and real estate consultancy services

- More than 50 years of experience in location and real estate research
- A 40-year history of providing compatibility studies for real estate projects
- More than 10,000 successful appraisals, amounting to more than 400 every year, with a third of these based outside of Germany!
- Interdisciplinary know-how thanks to a 40-person team consisting of economists, geographers, urban planners, sociologists and social economists
- Appraisals that draw on the latest market data, intensive on-site evaluations, a proven methodology and the worldwide GfK network
- Company representatives are recognized authorities in their field and members of various advisory boards of real estate institutions and media sources, such as the German real estate industry publication, Immobilienzeitung, the International Council of Shopping Centers as well as numerous chambers of commerce.

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's consulting services, please call: +49(0)7251 9295200.

Micromarketing: Street-level market data and analyses

“Birds of a feather flock together.” This is the principle of micromarketing. GfK GeoMarketing’s highly detailed street-level market data allow companies to achieve more targeted marketing campaigns, product positioning and new customer acquisition strategies.

What’s the use of determining your target group if you can’t actually locate its members? Today’s companies are under a lot of pressure to reach as many potential customers as possible while keeping costs down. A key factor in achieving this goal – particularly in the case of companies who sell directly to end consumers – is the ability to carry out highly targeted marketing and advertising campaigns. In short, “precision” is the watchword when it comes to reaching existing and potential customers.

With GfK GeoMarketing’s micro-geographic market data, companies can hone in on their target groups by searching small-area regions for the relevant profile (e.g. family type, accommodation type, lifestyle, consumer behavior, etc.). Simply put, this data makes it possible to pinpoint locations whose inhabitants fit the profile of your ideal customer.

of data sources – market data, information on the competition and a company’s own data – businesses can quickly arrive at valuable insights regarding their target groups and markets. Of course, the program’s analytic and search features are not limited to the level of street segments. You can easily view data at the level of municipalities and postcodes, or even for user-defined areas such as sales regions or catchment areas.

Applied micromarketing

Micromarketing is useful to any company that wants to evaluate the unique socio-demographic and neighborhood characteristics of consumers’ environment. In short, any business that sells directly to end consumers – from mail-order companies to financial service providers – can benefit tremendously from this approach.

Questions easily tackled with a micromarketing approach include:

- How large is my catchment area?
- How many people live in the immediate proximity of a business location and what is their purchasing power?
- What is the socio-demographic profile of the residents of a given area or neighborhood?
- Which competitors are located nearby and what is their local influence?
- What is the profile of a given location (urban, rural, etc.) and what is its drawing power?

Micromarketing also offers the ideal basis for planning more targeted marketing campaigns. Other key areas of application in marketing, sales and expansion divisions include calculating potential for various products and services as well as performing scoring analyses for the



Street-level market data for precision planning

Micromarketing takes advantage of the fact that people who live close together tend to have similar consumer behaviors. The goal of micromarketing is to use a combination of comprehensive data sources from different regional levels – from street segments and postcodes to municipalities, greater metropolitan areas and counties – to generate accurate and comparable data down to the smallest geographic level possible. This allows for more precise target group location, resulting in better response rates and the optimal use of available resources. Micromarketing fully respects individual privacy: Microgeographic data always refer to street segments (containing at least five households) rather than to the individuals living in these areas.

In a micromarketing approach, microgeographic market data on potential and/or information about the competition are calculated and associated with the appropriate digital maps, down to the smallest geographic level possible. To facilitate this, GfK GeoMarketing provides both the latest market data and high-quality digital maps. Clients can then import their own customer data in order to place it into relationship with this information. It is therefore possible to create a profile of each target group and assess each street segment according to factors such as purchasing power, accommodation and family type. All of this is visualized with the help of a special geomarketing software application. GfK GeoMarketing recommends the use of GfK MartViewer, a geomarketing software solution custom-tailored for working with immense amounts of data on detailed (micro)geographic levels. With just a few clicks of the mouse, you can access all of the data via an intuitive visual interface, complete with various analytic tools and report-generating functions. By bringing together such a wide variety

And where do you want to go?

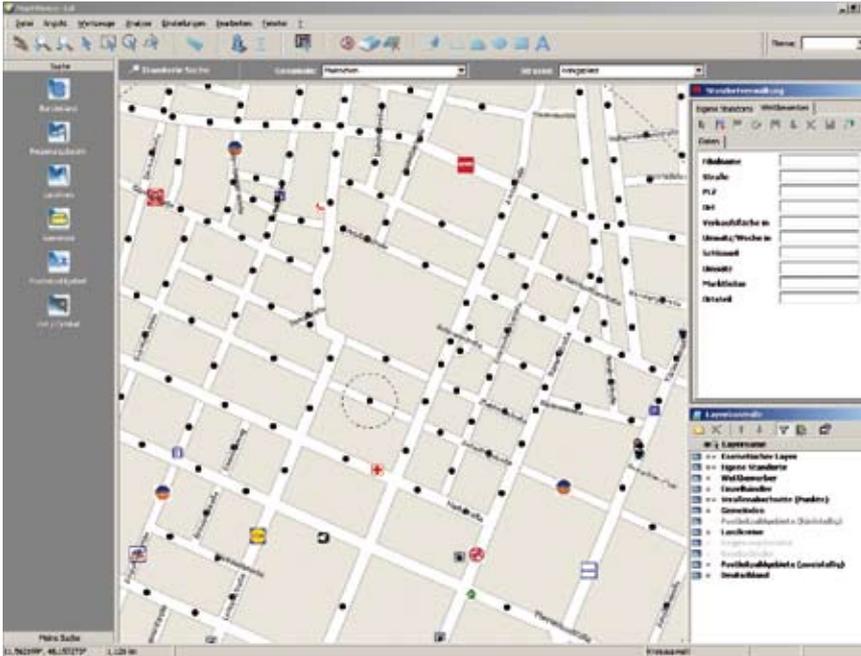


Worldwide maps and market data for your analyses:

- 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.



Street segment Munich, Schellingstr. 72-93

House numbers	Type	first	last
left side of street	2	86	72
right side of street	5	01	01

GfK Population and Households			
	absolute	as a %	index
Population	262		
Households	158		
Average household size	1.7		
Immigrant households	26	16.35	232

GfK Socio-Economic Status			
Monthly net household income	absolute	as a %	index
up to €1,000	1	0.63	4
€1,000 up to €1,500	27	17.09	139
€1,500 up to €2,000	76	48.10	256
€2,000 up to €2,500	37	23.42	159
€2,500 up to €4,000	17	10.76	45
€4,000 and higher	0	0.00	0

GfK Accommodation Profile			
Building type	absolute	as a %	index
Mixed	-	-	-
Commercial	-	-	-
Residential	158		
- 1-2 family house	0	0.00	0
- 3-6 family house	1	7.58	20
- 7-9 family house	11	69.62	1,645
- 20+ family house	1	7.85	1,825

Illustration: MartViewer report:

The depicted street segment encompasses 158 households, around 20% of which belong to immigrants, a figure well above the national average.

The area in question consists primarily of large apartment blocks with mostly mid-level income households (a little more than 70% of the households have monthly net earnings between 1,500 - 2,600 euros). There are a variety of family types, with an above-average number of singles (index 137). More than half of the household heads are under 40 years old. On average, households in this area have 2,114 euros per year available for food and luxury-item expenditures; residents in this location spend an above-average amount on clothing, with more modest expenditures on furniture.

purpose of optimizing customer support and/or new customer acquisition. It's also widely used for analyzing catchment areas, planning locations and optimizing branch networks.

We pride ourselves on adapting our products and services to our clients' precise needs so that we can deliver the perfect solution.

Micromarketing – Do it yourself or take advantage of our expert knowledge

Thanks to our many years of experience and wide range of products and services, GfK GeoMarketing offers everything you need for professional micromarketing, including our microgeographic databank GfK POINTplus and GfK MartViewer, a powerful, customizable geomarketing software solution that is specifically designed for working with analyses on the level of street segments. We also offer numerous market data sets on the level of Germany's 2.5 million street segments.

Some of the market data sets we offer include:

- GfK Demographics – Indicates region-specific profiles of the population according to age, income level, family type and accommodation type
- GfK Purchasing Power – Reveals the disposable income of the population according to region
- GfK Retail Purchasing Power – Shows the region-specific potential for fixed-location and mail-order retail
- GfK Purchasing Power for Retail Product Lines – Provides purchasing power data for 61 different retail product lines
- GfK Financial Services Potential – Reveals the potential for financial services among German households, organized by region
- GfK Euro Socio Styles (Roper Consumer Styles) – Provides consumer behavior profiles for key target groups

Naturally, we're happy to calculate specific market data and indices based on your individual needs and wishes. Our market data experts would be happy to advise you!

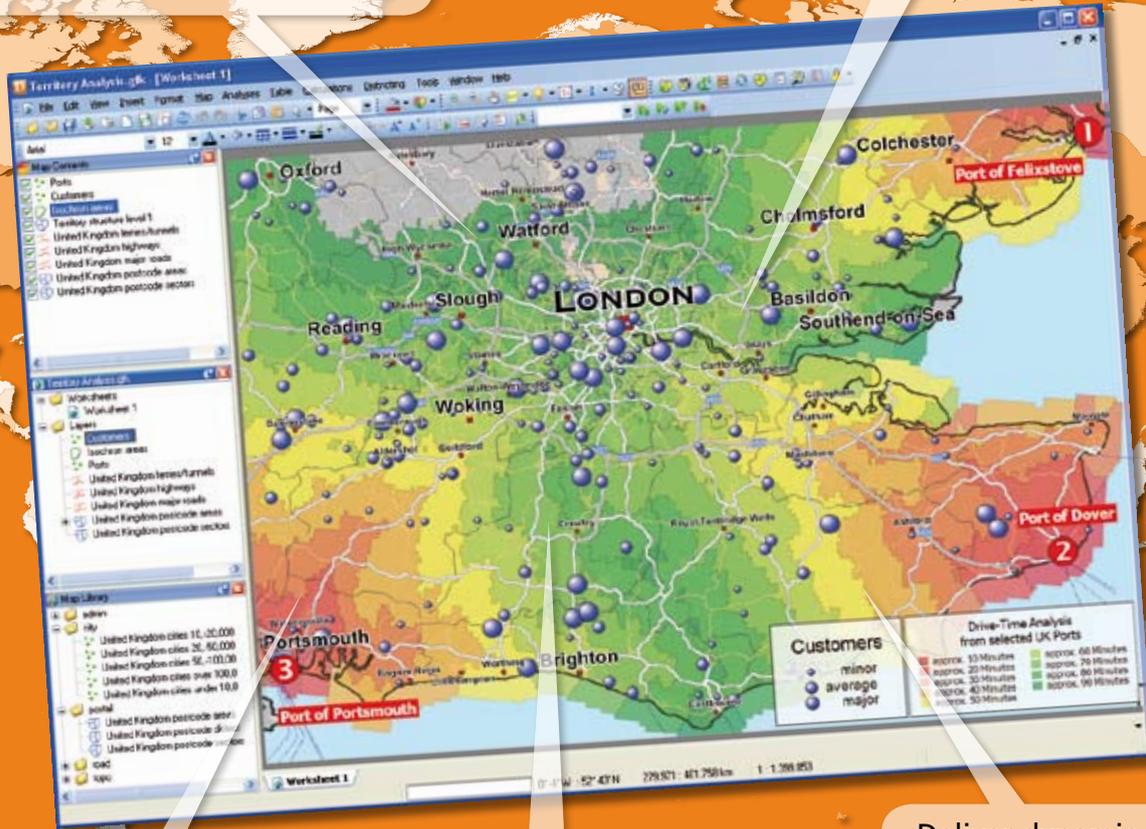
Any questions? Contact Moritz Boesken at +49 (0)7251 9295 370 or m.boesken@gfkgeomarketing.com.

R RegioGraph 10

The new update allows you to access RegioGraph from directly within Office 2007!

Visualize your customers' locations

Recognize market potential



Locate your target groups

Evaluate your sales territories

Deliver dynamic reports and presentations



2008 update for RegioGraph: Success through the latest technology and data

- A complete map set of a European country of your choice
- GfK Purchasing Power 2008 for Europe at the country and GfK regions levels
- Microsoft Office 2007 Plug-In for quicker and more efficient geomarketing

RegioGraph 10 is also available as part of a discounted bundle that includes Microsoft Office Small Business Edition 2007!

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

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GfK GeoMarketing

New digital maps of Asia – Quality down to the finest detail

GfK GeoMarketing is the largest producer of worldwide administrative and postcode digital maps. We are currently hard at work on updating our digital map set for all of Asia. Here's a behind-the-scenes look at the details of this exciting project.

Up-to-date digital maps are the most important basic component of every geomarketing software application. One of the chief difficulties for internationally active companies is gaining access to up-to-date, high-quality digital maps that fit together seamlessly and can be easily incorporated into a geomarketing software application. All of the maps offered by GfK GeoMarketing – with coverage of more than 240 countries worldwide – fit these criteria thanks to our highly experienced team of professional cartographers. At the moment, these cartographers are hard at work updating GfK GeoMarketing's Asia map set. Very few digital maps of Asia exist that are optimized for use by businesses. Consequently, the process of producing and updating these maps requires extensive research and cartographic know-how.

Comprehensively updating a map set involves thoroughly researching the official and actual postcode and municipal boundaries, compiling numerous maps, consulting satellite imagery and much more. As part of this process, GfK GeoMarketing consults with statistics agencies, post offices, governments, cartographic organizations and various international sources such as NGOs.

This intensive research poses significant challenges. In many Asian countries, these sources – if they exist at all – are only available in the indigenous language. Internet access to these sources is sketchy to non-existent, and most available maps are lacking in detail. GfK GeoMarketing contacts a large number of local agencies as part of its efforts to obtain the most up-to-date and detailed cartographic information possible. Our cartographers then piece together and refine this information with the help of knowledge obtained through our company's membership in the worldwide GfK network. The latter allows us to work directly with GfK employees from all over the world in order to obtain the latest, on-the-ground information to ensure the most accurate digital maps possible.



After acquiring this information, the next step is to digitally sample the topography of each country in question in various levels of detail. This is done by using satellite imagery as well as digital and paper maps obtained over the course of our research. Particular attention is paid to rendering coastlines as precisely as possible, as maps with this feature are an invaluable resource for many companies, such as insurance providers who want to assess the risk of flooding and other natural disasters for a given location. We also expend a lot of effort on representing rivers, cities, urban areas, streets and transportation networks as accurately as possible. Much time is also spent on translating names of various map ele-

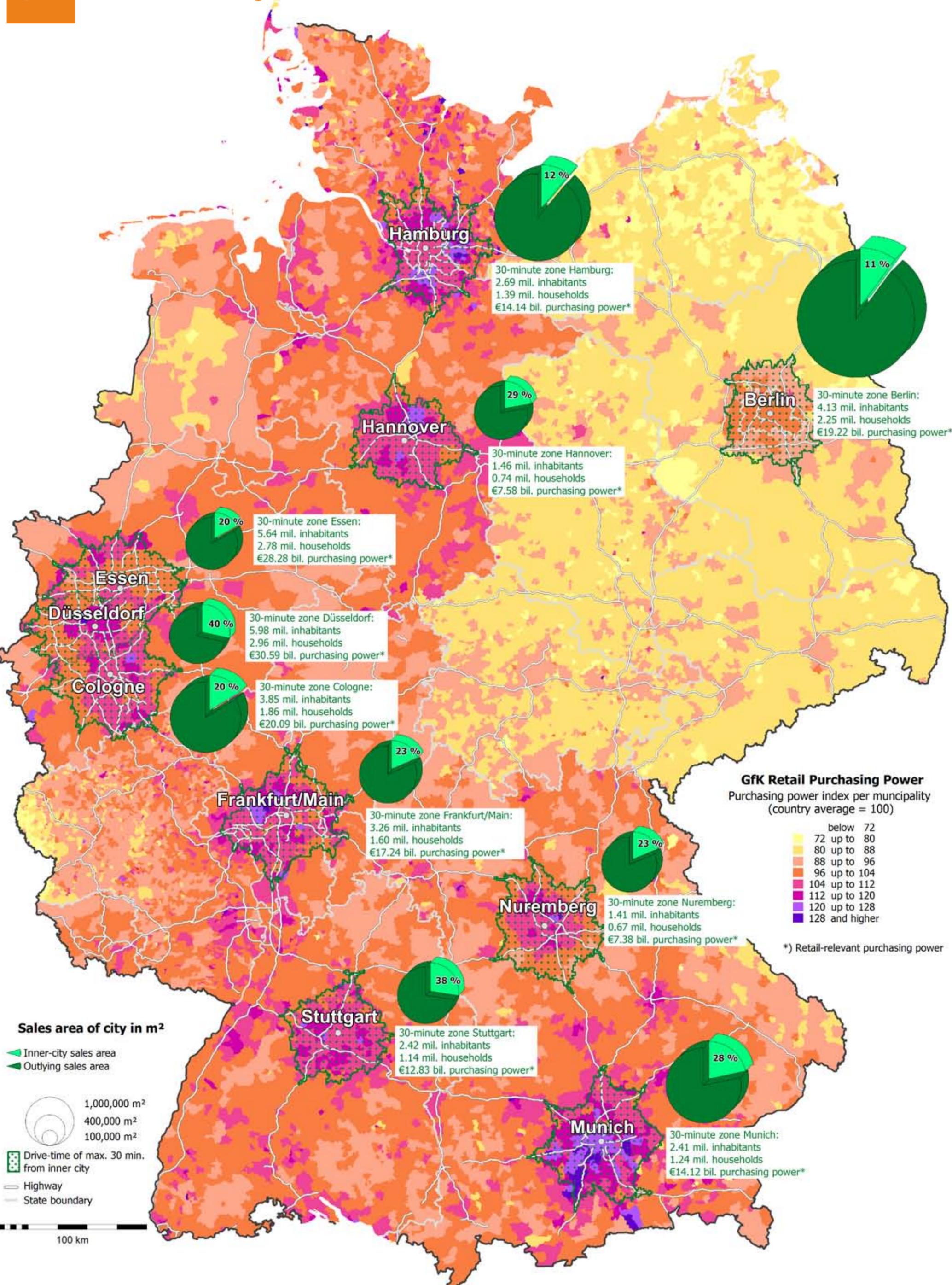
ments into the internationally recognized nomenclature. GfK GeoMarketing's Asian administrative maps contain both the native-language attributions as well as their Latin-alphabet transliterations.

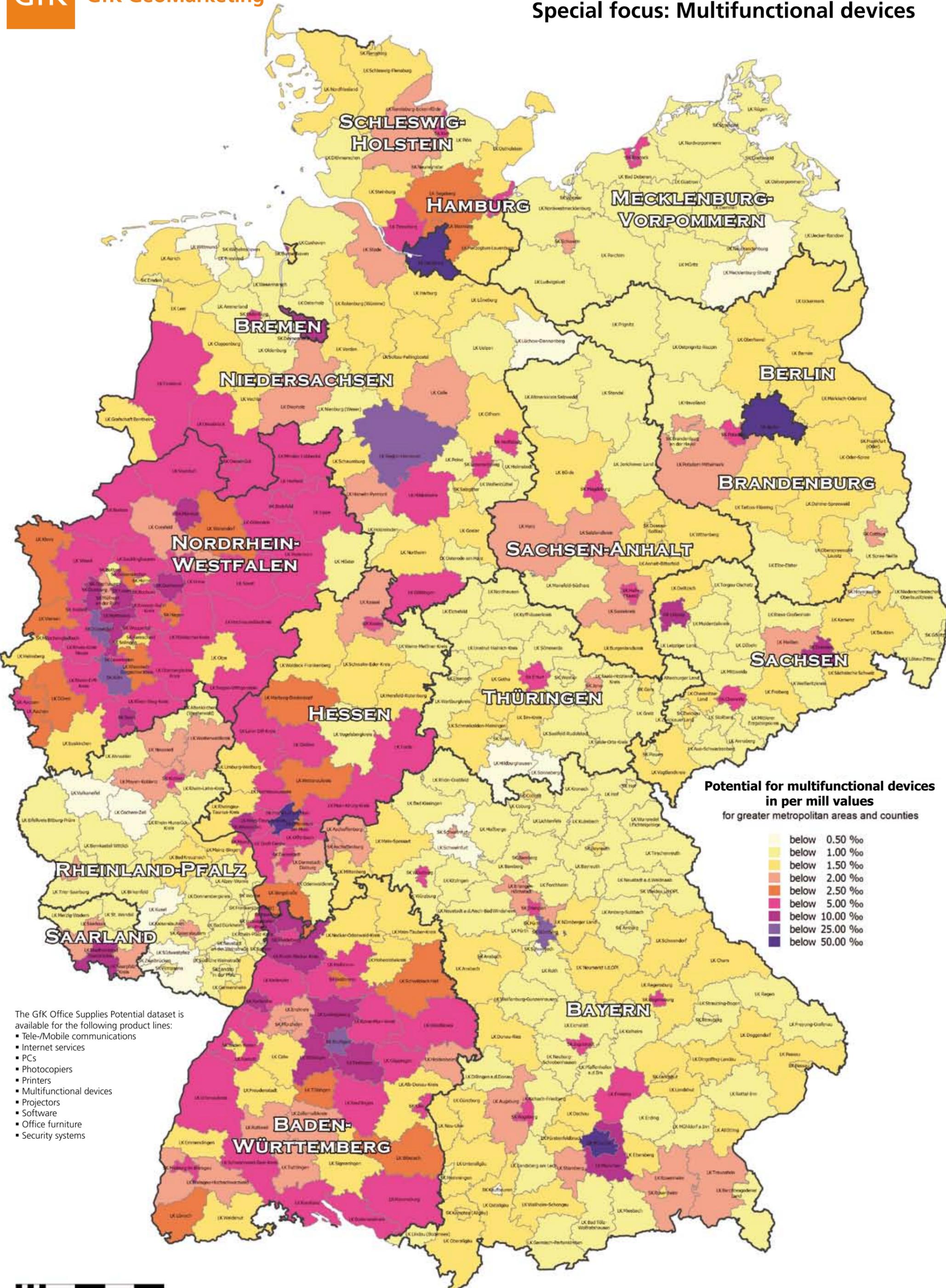
The next step is the preparation of the administrative and postcode maps. GfK GeoMarketing provides coverage of at least the two major administrative levels of every Asian country. For example, in the case of Indonesia, this corresponds to the propinsi (provinces) and kabupaten (districts). Postcode coverage is provided at the level of two to three digits for all countries with official postcode systems.

GfK GeoMarketing consults with numerous on-site sources to ensure that the administrative and postcode structures are correctly rendered, because only the most accurate digital maps are suitable for performing precise analyses or sales territory and expansion planning.

The Japan map set is already available, while maps for the other Asian countries are still in production. The complete Asia map set will be available from GfK GeoMarketing in early 2009.

Further information on GfK GeoMarketing's collection of digital maps can be found at www.gfk-geomarketing.com/maps.





The GfK Office Supplies Potential dataset is available for the following product lines:

- Tele-Mobile communications
- Internet services
- PCs
- Photocopiers
- Printers
- Multifunctional devices
- Projectors
- Software
- Office furniture
- Security systems

Tutorial: Calculate drive-time zones for your business locations

The calculation of drive-time zones – or as “isochrons” – makes it possible to organize your sales territories according to accessibility. Using this technique, you can easily produce tariff zones around your business sites or generate representations of turnover potential in your catchment areas.

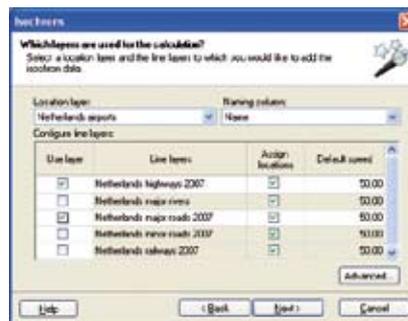
Preparation

In order to calculate drive-time zones, your project file should contain a **point layer** with one or more locations (e.g., of your offices). Also make sure to include street layers in your project, i.e. select at least the **highways** and **main roads** sub-layers. For more detailed representations, select the **minor roads** and **local roads** sub-layers as well.

Calculation

Select **Isochrons...** from the **Calculations** menu. An application wizard will guide you through the subsequent steps. Select **“Time to next location (min)”** and click **Next**.

Make the following selections in the second dialog window:
In the upper left-hand corner, select the **location layer** that contains your locations



Specify the **name** column under the **Naming column** heading. In the field directly below, select all of the line layers that should be taken into account for the purpose of the calculation. For a simple overview, it's sufficient to select just the **highways** and **main roads** line layers.

Tip: The TeleAtlas street layers integrated into the application contain average traveling speed entries for every street segment. The shaded “average speed of 50 km/hr” entry is only used when no data exists for the average travelling speed of a given street/roadway.

The third dialog window allows you to designate the information that should appear in new columns in the street layer table. For the purpose of getting to know this feature, place a **check-mark in every box** and click **Next**.

In the final dialog window, you can specify the number of zones to be created as well as the zone boundaries in minutes.

The **Create isochron areas** option allows you to create a new layer that illustrates drive-time accessibility (see illustration on far right). Go ahead and select this option.

When you've entered your desired settings, click **Calculate**. Depending on the complexity of the data involved, this may take a few moments.

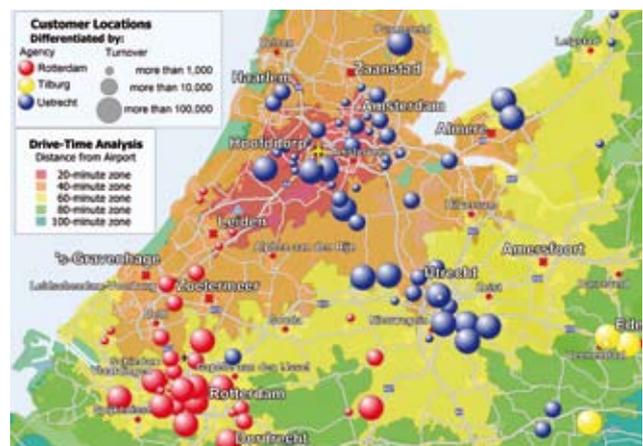
Result

The calculation will deliver two results:

In the layer tables of the streets you selected, you'll find three **additional columns** containing entries on the exact distance, drive-time zone and name of the associated business location for each of the street segments in question.

More importantly, you'll find a newly created area layer called **isochron areas**. This allows you not only to display drive-time zones on your maps, but also to carry out additional steps (e.g. **layer data transfers**) and analyses, such as displaying the number of customers located in each distance zone.

Additional tutorials can be found at www.gfk-geomarketing.com/tutorials.



Boost profit through intelligent sales territory planning

Companies with a thorough knowledge of their sales structures are already ahead of the game. GfK GeoMarketing's consultants have planned and optimized hundreds of sales structures. Read on to find out more about the most important criteria for your 2009 sales territory planning.

"My colleagues are responsible for generating a yearly turnover of between 4 and 5 million euros per person, providing our customers with expert consultancy services for 24 product lines and closing an average of 1.8 business deals each workday," details Jenny Sandro, director of sales for a metal pipe and components manufacturer. Most sales directors are able to quote by heart similar up-to-date figures on the sales frequency, product margins and turnover volume generated by their external sales team members.

Sales structure often a blind spot

Unfortunately, this detailed knowledge often doesn't extend to questions about the sales potential of a particular sales territory or the turnover draw of a given business location. Other questions for which it is often difficult to get precise answers include: Can all sales territories be efficiently accessed? What is the regional market share? Which tools are used for territory optimizations? Unfortunately, many sales managers launch into vague generalities when confronted with these kinds of queries.

Sales territory planning demands attention

Many companies do not seriously address sales territory planning issues until confronted with a significant sales problem, such as the departure of an important member of the external sales team or the rise of a competitor in an area of operation. When something like this occurs, everyone begins asking the "where" questions: Where are the exact locations of our customers? Where is our external sales team active? Where is the greatest potential for new customer acquisition? Where are our competitors located?

Luckily, DISTRICT, GfK GeoMarketing's sales territory planning software solution, is specially designed to generate precise answers to these and many other questions.

Step 1: Achieving insights through cartographic illustrations

The first and perhaps most important step is to objectively display the existing state of your company. The geomarketing software solution DISTRICT makes this very easy, allowing you to visualize your sales structure on high-quality digital maps. This straightforward step usually reveals significant insights regarding areas of strength and weakness – e.g., areas in which customers are underserved by external sales staff. The results of this preliminary assessment can easily be distributed to all those concerned – an important step in ensuring that any changes implemented later will be understood and accepted.

Step 2: Making objective comparisons using external market data

The second step involves importing external market data such as competitor locations or relevant business sites into DISTRICT. GfK GeoMarketing's consultants can advise you as to what kind of data should be imported based on your situation. An important aspect of this step is to carry out an objective comparison of your company turnover with the actual market potential. Whether a given sales area is actually underperforming or already achieving the local market potential is something that you can definitively establish during this step.

Step 3: Quickly achieve your optimal sales territory structure

DISTRICT provides numerous easy-to-use tools for realigning and optimizing your external sales structure, allowing you to apportion your active sales territories objectively, efficiently and fairly.



The software lets you specify which factors should be weighted mostly heavily in your restructuring – for example, potential, new customer acquisition, accessibility, natural barriers, sales staff's places of residence, etc. If desired, you can give equal weight to all criteria. DISTRICT offers tremendous flexibility and customization, allowing you to produce various restructuring scenarios so that you can select the variant that precisely corresponds to your goals.

Fully exploit your market potential

The company for which Sandro works used DISTRICT to carry out a systematic analysis of its external sales territories for the first time last fall. This analysis revealed, among other things, that a significant number of metal processing subcontractors had established themselves in the areas around the city of Leipzig in Eastern Germany over the course of the past decade. Although offering many potential customers, these businesses had been ignored in the company's sales plans. Thanks to the analysis, Sandro's company stationed an additional sales team member in this area to develop the region's potential. This is but one example of how a GfK GeoMarketing sales territory optimization can boost a company's performance. In the case of Jenny Sandro's company, greater transparency and market exploitation was achieved, as well as the introduction of an employee bonus scheme, which significantly increased motivation.

Sales territory revision in just one afternoon!

Sandro is planning on carrying out a new sales structure optimization this fall. This isn't because the previous revision was incorrect, but rather simply because the external factors affecting a business are constantly changing. For example, the additional sales force member added after the previous revision has now found his footing

and is ready to expand the geographic area for which he is responsible. Thanks to DISTRICT's user-friendliness, this adjustment could be carried out over the course of a single afternoon. Moreover, maps of each stage of the process were produced in order to facilitate greater transparency and ease of negotiations among employees and business partners. The entire restructuring – from planning phase to implementation – was carried out very speedily. This saves Jenny Sandro precious time so that she can concentrate on her core duties: the successful sale of metal components.

For additional information on how GfK GeoMarketing can help you with your sale territory planning needs, please visit www.gfk-geomarketing.com/sales_territory_planning.

Need a boost?



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Tufts University develops a hunger relief program using map analyses

A study carried out by Boston-based Tufts University delivers new information on under-nourished children in Panama, Ecuador and the Dominican Republic. GfK GeoMarketing donated digital maps for the cartographic analyses underpinning the project.



Reducing poverty and hunger is one of the United Nation's most important humanitarian goals. Sadly, children are the most common sufferers of malnourishment. This lack of nutrition is a key factor in numerous illnesses, retarded cognitive development and child mortality rates.

One of the preliminary steps in eliminating hunger is to identify the precise locations where the problem is most pervasive.

The Gerald J. and Dorothy R. Friedman School of Nutrition Science and Policy at Tufts University in Boston, USA is a leading force in the research of malnourishment as well as the development of innovative approaches to combating the problem.

In association with the United Nations' World Food Programme and the governments of Panama, Ecuador and the Dominican Republic, the Tufts hunger-mapping team developed a groundbreaking method for measuring the scale of the hunger problem by identifying the number of affected children at the microgeographic level. The aim of this initiative was to give governments in these areas the ability to channel and distribute their resources as efficiently as possible. The project identified the characteristics of the most affected areas (e.g. urban vs. rural, mountainous vs. coastal, etc.), allowing speculations regarding the region-specific causes of the malady.

The cartographic representation of these areas contributed toward a better understanding of the exact parameters of the problem. Thanks to the intuitive and impact-generating nature of the maps produced by the project, greater awareness was raised among researchers, policy-makers and the general public, inciting renewed efforts to alleviate the situation.

GfK GeoMarketing provided the research team with its digital maps of Panama, which contained boundaries of the country's administrative units as well as its larger cities. Among other things, these maps helped the team determine the distances between metropolitan areas and the various villages and communities where the problem was most acute.

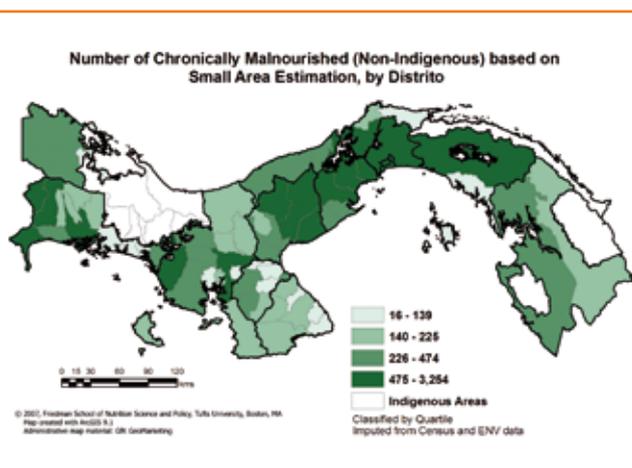
Most governments collect information on the nutritional situation in their countries by carrying out nationwide studies that evaluate a wide range of factors, including geographic, socio-demographic, socio-economic and cultural conditions. By associating this data with detailed geographic information, it's possible to make much more accurate predictions regarding the likelihood of malnutrition in certain areas. The Tufts approach cast a broad net by taking additional key factors into consideration, including the degree of agricultural land usage, climate, access to medical care and education as well as the accessibility of economic centers.

The governments who participated in the project are now using Tufts University's hunger-distribution maps and assessment methodology as a means of optimizing their national nutritional programs.

Author: James Wirth, Tufts University

For more information on the study and Tufts University's hunger-mapping team, please contact James Wirth at ipwirth@gmail.com. Results of the study can be viewed at www.nutrition.tufts.edu.

The so-called "hunger maps" of Panama, Ecuador and the Dominican Republic were created using ESRI's ArcGIS along with a special analytic approach known as "small area estimations". This made it possible to take data from a representative study covering a broad region and combine it with the team's own research data as well as socio-demographic information in order to create regional profiles and prognoses.



Sustainable urban development concepts for public authorities

With significant competition for funding and changing retail conditions, today's public authorities and city councils don't have it easy. GfK GeoMarketing provides an array of support to public bodies so that they can meet these challenges and prosper.

GfK GeoMarketing has decades of experience in developing innovative urban development concepts for public bodies that promote sustainable inner-city growth, retail centers and convenience store networks.

We provide comprehensive assistance for retail projects of all sizes, carrying out extensive research and impact studies to ensure sustainable growth, compatibility and adherence to all local building codes and regulations.

Thanks to its many years of experience and interdisciplinary team of experts, GfK GeoMarketing regularly provides cities and municipalities with comprehensive support for urban development, delivering intelligent and sustainable concepts that stabilize and strengthen urban communities.

Urban development with finesse

City development demands an holistic approach that takes into account spatial, historical and structural factors. Depending on the needs of our clients, this might entail the planning and development of an entire city area, or, in other cases, the revitalization of an individual district or economic center.

Actualizing potential through concrete measures

Simply put, GfK GeoMarketing helps you determine and actualize your city's potential.

We provide advice on developing your city's potential across a wide range of areas, including the retail, gastronomy, business, industry, accommodation, tourism and recreation sectors.

GfK GeoMarketing involves both experts and the general public in this process. Our many years of experience and trademark objectivity have made us trusted authorities among public bodies.

Case-in-point: Sustainable convenience store concepts

In many places, retail developments in commercial and/or residential areas create significant structural disruptions to a city's constituent districts. If, as a result, convenience stores go out of business, large numbers of residents will no longer be able to reach any consumer venues by foot. This occasions a lowering in the quality of life of the affected areas as well as an increase in car traffic. Our GfK convenience store concepts take not only socio-demographic factors into account, but also examine the services and products that are particularly lacking in a given area. For example, we can identify segments of the population with limited mobility and take these findings into account when researching and composing our proposals.

GfK GeoMarketing – Expert solutions for urban development

We employ an interdisciplinary team of experts, including economists, geographers, city planners, sociologists and social economists. This wide-ranging expertise allows us to perform comprehensive evaluations and deliver balanced, well-grounded

Wilfried Weisenberger – Director of Real Estate Consultancy for Retail and Public Bodies



Wilfried Weisenberger, born 1957, has been part of the GfK team since 1991. He is an expert in location and real estate consulting, especially for questions related to retail and municipal planning.

Weisenberger also holds a teaching position at the University of Stuttgart and the IREBS Real Estate Academy in the area of location and real estate research. Additionally, he is a member of the advisory panel of the "Into the Center of Hesse" urban development initiative.

Wilfried Weisenberger can be reached at +49 (0)911 395 2754 or w.weisenberger@gfk-geomarketing.com.

proposals. We understand that many criteria contribute to a municipality's quality of life, from cohesive, well-planned residential areas and conveniently located neighborhood stores to a lively retail trade, cultural opportunities and pleasing aesthetics. Thanks to decades of experience offering advice and support to communities, GfK GeoMarketing is ideally placed to help you realize your vision for sustainable urban growth and development.

For more information on our consultancy services, please visit www.gfk-geomarketing.com/consulting.

540,000 km² sales area managed with DISTRICT

Atlas Copco Tools Central Europe uses DISTRICT to perform regular sales territory optimizations for its massive 540,000 km² sales area that spans five countries. The result: A marked increase in productivity!



Atlas Copco

Atlas Copco is a leading international provider of industrial productivity enhancement solutions. Its many products include air compressors, generators, construction and mining equipment, industrial tools and assembly robotics.

Atlas Copco's sales area for industrial and assembly robotic tools encompasses Germany, Austria, Switzerland, the Netherlands and Belgium.

In short, our company's areas of operation extend across multiple national boundaries, requiring us to keep careful track of our activities to ensure the cohesive management of sales territories.

Since 2000, DISTRICT has served as the instrument with which we have been successfully coordinating operations in our wide-ranging sales territories and performing numerous optimizations.

We have special analytic tools that allow us to calculate all the relevant basic sales data for the smallest regional units. We then import this data into DISTRICT and use it for further calculations and analyses. Numerous factors come into play each time we prepare to optimize our sales territories. These include not only demand levels, but also, crucially, the locations of our many customers, sales and service staff as well as street networks. DISTRICT 10's inclusion of comprehensive Tele Atlas street maps as well as distance-calculating tools such as the isochron analysis help us bring our diverse markets into sharp focus. Thanks to DISTRICT, we're easily able to determine and display the optimal customer assignment configurations for our staff members.



Additional criteria that affect our sales territory structures are the locations of natural barriers (particularly with regard to the mountainous terrain in Switzerland and Austria) as well as the provision of customer service through our regional resellers.

Thanks to DISTRICT's many included maps and extreme user-friendliness, we are able to create optimized territory structures for our 540,000 km² within a couple of weeks, achieving a high level of transparency at every stage of the process.

The DISTRICT feature with which we are most impressed is the ability to aggregate any territory structure – such as postcode areas – into a new regional configuration at a mere click of the mouse. These kinds of aggregations – e.g. sales territories or sales regions – can be then be manually – and almost effortlessly – adapted and fine-tuned, while all of the associated data is automatically recalculated at each change. This means that after the official optimization phase, urgent changes to our operations or structures can be implemented and updated within minutes.

Because DISTRICT is also used by our sales directors, it's possible for them to try out and prepare their own ideas for possible improvements in their area at any time by modifying an existing DISTRICT map or project. Later, when it's time for the planning talks between all teams, it's then a simple matter of comparing and evaluating these proposals. This, of course, accelerates and simplifies the process of coming up with and agreeing on better structures for our many sales territories.

In summary, DISTRICT has significantly simplified our planning process. Thanks to the increased transparency, we have also achieved a pronounced boost in productivity.

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As always, we'd love to hear your feedback. Let us know what you think about the new website by writing to pr@gfk-geomarketing.de.



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Get the most up-to-date information on GfK GeoMarketing products and services, from maps, market data and location research to RegioGraph and DISTRICT, our award-winning geomarketing software solutions.

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Meet GfK GeoMarketing!

Would you like to personally get to know our geomarketing software solutions RegioGraph and DISTRICT as well as our Europe-wide market data, worldwide maps and consultancy services? We'd be delighted to introduce you to our products and services at any of the following upcoming trade fairs:



From **September 30 - October 2**, we'll be at the 2008 **POST-EXPO** in **London**. You can find us in the ExCel London section at **stand no. 1240**.



From **October 1-2**, we'll also have a contingency in **Wiesbaden**, Germany at the **Mail Order World**, a trade fair associated with the German Mail Order Convention. You can find us in hall 9 at **stand no. 903**.



From **October 6-8**, our location research experts will be at the **Munich**-based **EXPO REAL**, one of the most important trade fairs for the real estate sector.



If you're active in the pharmaceutical industry, you'll want to be sure not to miss your chance to meet with us at the annual **Pharma Sales Force** trade fair in **Berlin** from **October 20-23**.

Book a personal appointment today at 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.

Experts talks with Presentations

IIR Pharma-Gipfel / Sales and Marketing 2008, August 26-28, Hamburg

Andreas Elble, GfK GeoMarketing consultant: "Professional sales territory planning with geomarketing"

POST-EXPO 2008, September 30 – October 2, London

Gerrit Schreiber, GfK GeoMarketing consultant: "Digital postcode maps as a basis for integrated logistics, sales and marketing operations"

Pharma Sales Force, October 20-23, Berlin

Andreas Elble, GfK GeoMarketing consultant: "Professional sales territory planning with geomarketing"

CRM-expo, November 5-6, Nuremberg

Simone Baecker-Neuchl, Director of GfK GeoMarketing Market Data & Research: "Locate and acquire customers – A case study of the growing senior citizen market"

Geomarketing coaching and software training at your company

GfK GeoMarketing offers RegioGraph and DISTRICT software training directly at your place of business. In a geomarketing coaching, we even work with your own company data and on your individual geomarketing tasks.

GfK GeoMarketing's experts regularly visit clients' companies to provide in-house geomarketing software instruction. This is an attractive and convenient solution that significantly enhances efficiency when working with RegioGraph or DISTRICT and reduces travel costs. In the case of a coaching, it allows participants to learn how to tackle their daily tasks using the geomarketing software and their own company data. Every participant receives a comprehensive English-language exercise booklet and learning materials.

An in-house software training course is the perfect way to sustainably boost your geomarketing expertise with just a minimal time investment!

If interested, contact Doris Steffen for a quote at +49 (0)7251 9295180 or d.steffen@gfk-geomarketing.com.

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Published by:

GfK GeoMarketing GmbH
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Public Relations:
Cornelia Lichtner
Graphics & Layout:
Saskia Speer
Editor:
Cornelia Lichtner
Tatjana Guentner
Gerrit Schreiber
Translator:
Christopher C. Guider
Printer:
Printpark Widmann GmbH

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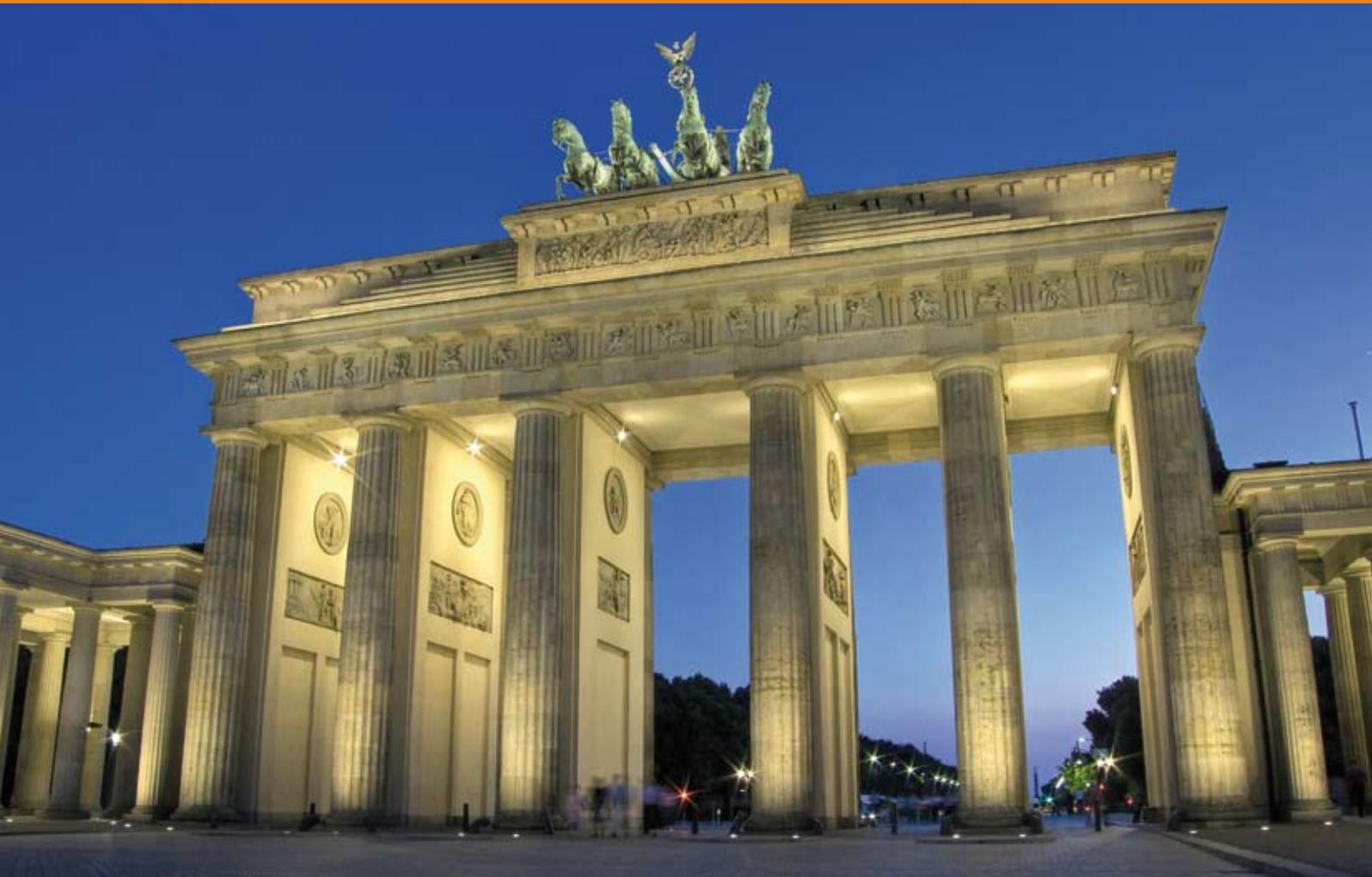
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- Data on demand levels in both the food and non-food retail sectors
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