

GfK

Growth from Knowledge

GfK

Growth from Knowledge



GfK RETAIL AND TECHNOLOGY

Market Intelligence on the Retail and Technology markets is available at www.gfkrt.com

Retail and Technology AT A GLANCE



Mission Statement

To be the preferred knowledge provider for sales information on technology consumer goods and entertainment media

As a global knowledge provider, our aim is to:

1. provide high quality sales information on consumer durables and entertainment media
2. using POS information from retailers, resellers and distributors
3. with global robust product feature information at SKU level
4. produced and delivered via StarTrack, GfK's web-based data platform

GfK Retail and Technology

offers modular, compatible information and market expertise, which enables clients to find the right solutions to a variety of business challenges.

Comprehensive and competent client service includes interpretation and evaluation of data findings by consultants with the relevant market expertise.

In an increasingly complex and competitive trading environment, complete understanding of the market creates a sound platform for decision-making.

GfK seeks to ensure client satisfaction with the quality of the information and service supplied.

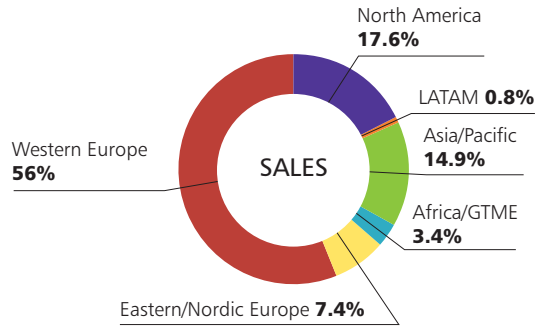


Dr Gérard Hermet
COO,
GfK Retail and Technology
Board Member GfK AG

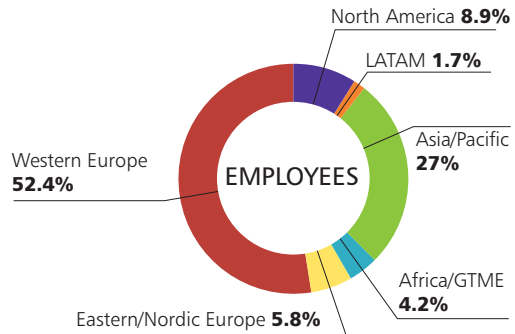
"Our focus is to provide the industry with robust sales-out information on all consumer technology markets. The information we deliver through StarTrack, our global online database, supported by a worldwide network of over 2000 permanent employees, helps retailers and manufacturers across the world optimize their business.

This strategy has proven to be extremely successful over the past years. We are delivering global research on the 'digital world' mixing the analysis of hardware and content."

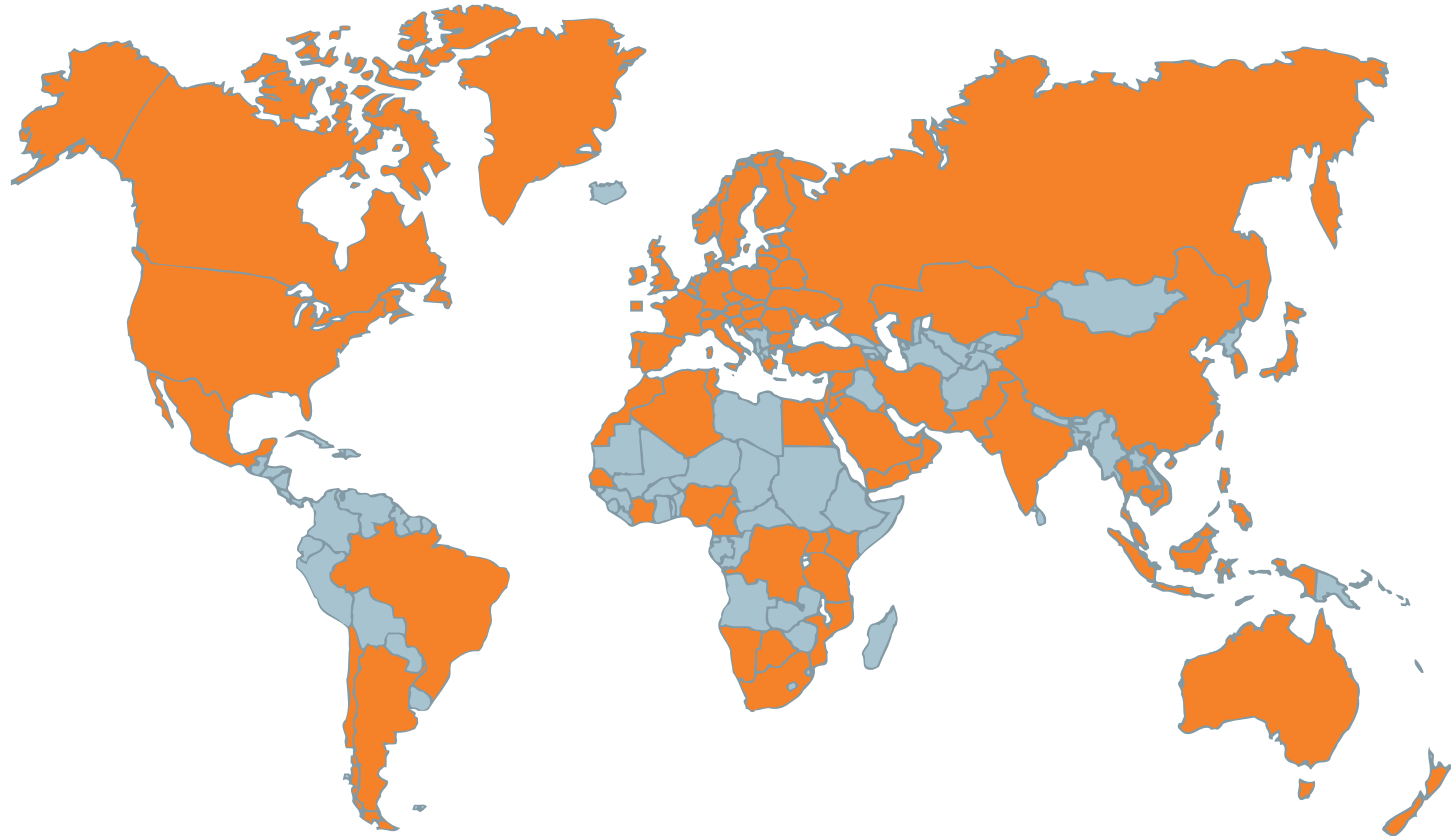




Figures include NPD America



Rounding differences may occur



Algeria	Botswana	Chile	Egypt	Hong Kong	Israel	Kenya	Malaysia	New Zealand	Portugal	Singapore	Switzerland	Turkey	Vietnam	* Democratic Republic of Congo
Argentina	Brazil	China	Estonia	Hungary	Italy	Korea	Mexico	Nigeria	Qatar	Slovakia	Syria	UAE	Yemen	
Australia	Bulgaria	DRC*	Finland	India	Ivory Coast	Kuwait	Morocco	Oman	Romania	Slovenia	Taiwan	Uganda		
Austria	Cambodia	Croatia	France	Indonesia	Japan	Latvia	Mozambique	Pakistan	Russia	South Africa	Tanzania	Ukraine		
Bahrain	Cameroon	Czech Republic	Germany	Iran	Jordan	Lebanon	Namibia	Philippines	Saudi Arabia	Spain	Thailand	United Kingdom		
Belgium	Canada	Denmark	Greece	Ireland	Kazakhstan	Lithuania	Netherlands	Poland	Senegal	Sweden	Tunisia	USA		

GfK BUSINESS SECTORS AUDITED

We are the world's leading POS information provider for the following industries:

TECHNOLOGY PRODUCTS

- Car audio and navigation
- Consumer Electronics
- Imaging Photo
- Information Technology
- Office Equipment
- Software
- Stationery
- Telecommunication

ENTERTAINMENT MEDIA media control GfK INTERNATIONAL

- Books
- Broadband and Mobile Content
- DVD Home Entertainment / VOD
- Games Software
- Music
- Video Game Consoles

GfK Retail and Technology division has a worldwide reputation as a specialist in consumer durables and entertainment media.

FASHION PRODUCTS

- Accessories
- Home Textiles
- Jewellery
- Luggage
- Textiles
- Watches

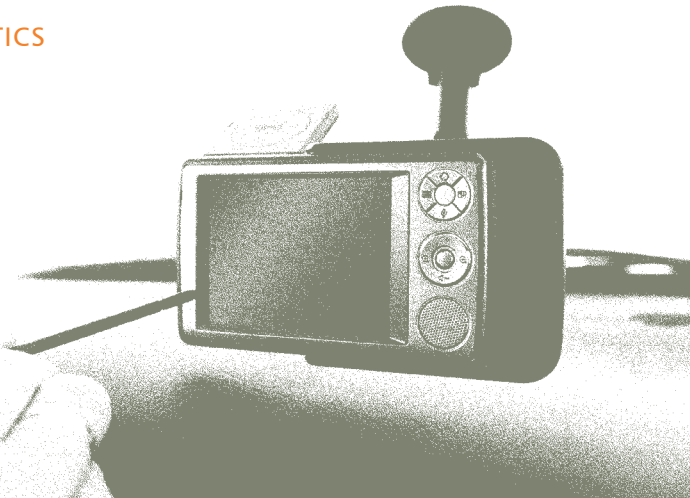
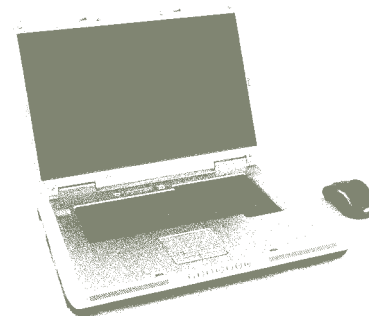
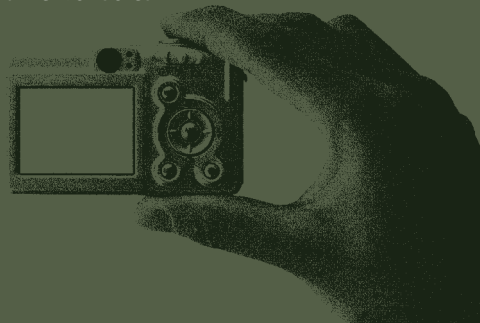
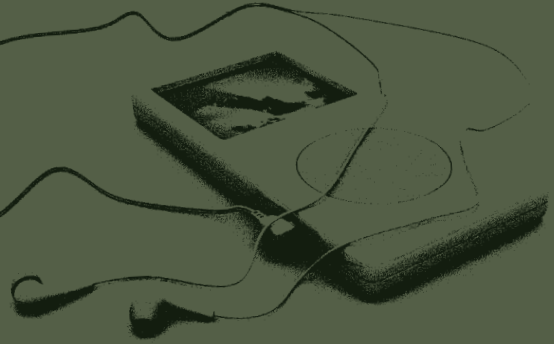
HOME PRODUCTS

- Automotive
- Energy
- Furniture
- Gardening
- Home Improvement
- Major Domestic Appliances
- Small Domestic Appliances

TOURISM

OPTICS

SECTORS

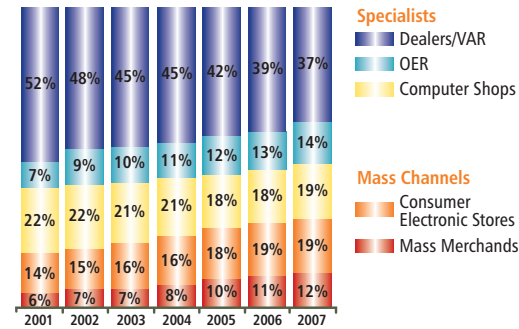


GfK Retail and Technology division's long standing cooperation with leading retailers, resellers and distributors ensures access to essential market information.

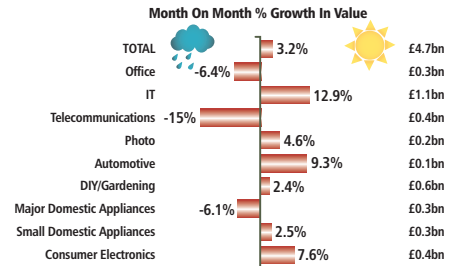
Through our monthly POS panels, decision-makers in all sectors of trade and industry use our data and services for:

- Category management
- Product development
- Channel strategy management
- Pricing strategy
- Optimizing marketing investment
- Maximizing stock efficiency

EMEA IT HARDWARE & CONSUMABLES *in value*



WHICH SECTORS HAVE DRIVEN THE MARKET?



"GfK Retail and Technology provides us with the right navigation system for our international activities."

Werner Winkelmann, President
Euronics International Ltd.

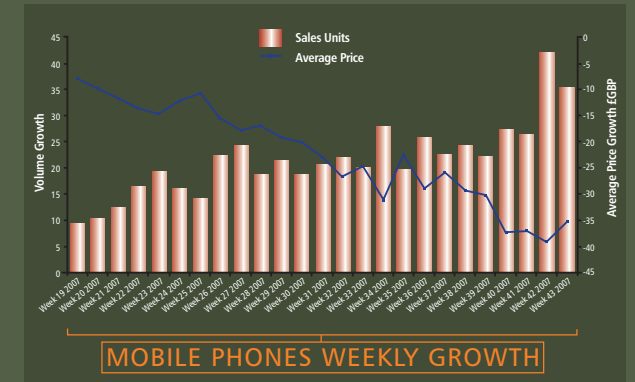
The GfK Weekly Monitor is a quick consumer demand report based on POS Data.

In an industry where a week is a store cycle, the Weekly Monitor is a tool which allows you to:

- Track the effectiveness of Promotions and Advertising (including those of your competitors)
- Identify the real trends behind seasonal shifts
- Launch strategies for new products
- Maximize supply chain management by optimizing stock availability

"Today's mobile phone market is a very fast moving one. Without reliable and fast market data it is not possible to plan marketing campaigns and create a product portfolio which reflects the market needs. GfK has been and still is the most important supplier of the data needed."

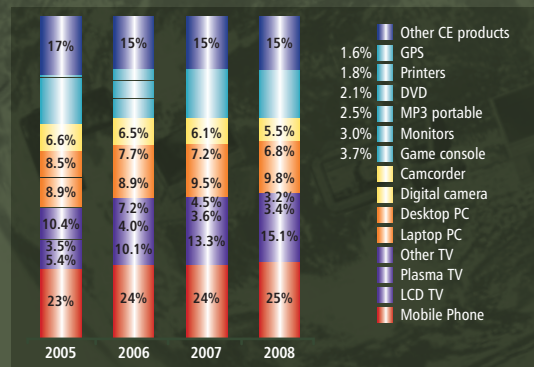
Kalevi Kaartinen, Vice President
Samsung Telecom Europe



The expansion of digital technologies has broken the walls existing in the past between the CE, IT, Telco & Photo sectors. It is now important to view the market as a whole.

Digital Convergence is a specialized service from GfK aimed at providing top management clients (key manufacturers, major retailers, financial community etc):

- Quarterly strategic insights into electronic goods consumption worldwide
- Assessment of products / brands that dominate the market
- Current and future distribution channels
- Key market updates on high definition technologies, eco-systems, display and mobility trends etc.
- Building Year+1 forecasts

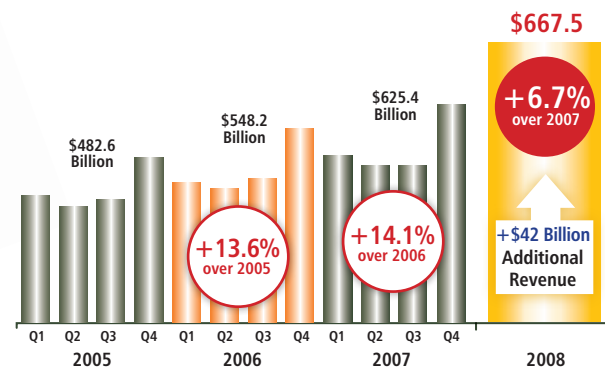


In collaboration with CEA, the industry Consumer Electronics Association, GfK produces data and forecasts on a global level.

Global technology forecasting provides answers to crucial questions:

- What business opportunities are arising from consumer expenditure and needs?
- In which country/region does the market potential lie?
- What does the future hold for the electronic goods market across the globe?

...and many more.



Global TCE Expenditures Top \$600 Billion

SALES THROUGH CONSUMER RETAIL CHANNELS

Retail Dollars | USD \$

Source: GfK/CEA
*TCE = Technical Consumer Equipment (CE+IT+Photo+Telco)

Retail Analytics offers the ability to 'drill down' to the POS data, catered to your specific business need.

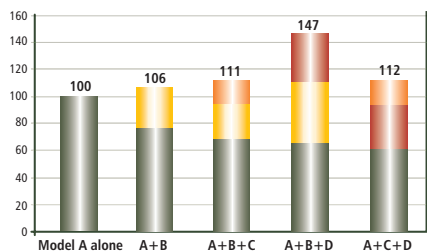
Retail Analytics allows the user, through store group analysis and modelling, to optimize their marketing actions by understanding the effects of price, price gap, assortment and promotions.

Whereby monthly panel information provides you with a strategic tool to understand the market, Retail Analytics, through store-group analysis and econometric modeling, enables you to answer various additional questions:

- How to better adjust my price in a competitive environment?
- What is the effect and ROI from my promotions?
- What is the effect on sales due to my advertising campaign?
- What is the best range of products in a store?
- What are the key levers driving my market share growth?

RETAIL ANALYTICS

Understand & Optimize Actions



- What should the optimal assortment be in a given store?
- Which product within my portfolio should I push?

Example:

OPTIMAL ASSORTMENT

The best performance is reached by adding models B and D, to the leading model A,

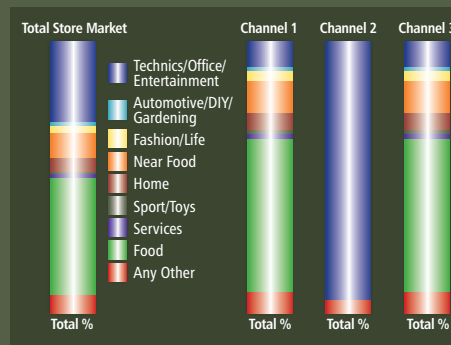
The Sales index is then 147!

RETAIL ANALYTICS

translating business questions into actionable solutions



Total Store Report (TSR) is a unique new tool from GfK designed to provide retailers and manufacturers with a comprehensive sales monitor covering their total portfolio of products and services, benchmarked against the retail market as a whole.



at a Topline level which can then be analyzed in detail by product group. TSR fully complements GfK standard reporting.

By using TSR you will be able to:

- Benchmark over and under performance of all your products and services versus the market
- Adapt product ranges according to market trends
- Gain more insight into sales channel dynamics
- Monitor consumer purchasing trends
- Improve product pricing strategy
- Plan and monitor promotion activity
- Better manage stock and space allocation

No longer category exclusive, GfK TSR aggregates sales of every product, into a standardized global reporting structure, enabling you to measure your performance against the market across all areas of your business.

The new report, which comes with drill-down functionality, provides information

TSR revolutionizing retail sales knowledge by giving you the full picture

GfK StarTrack (System To Analyze and Report on TRACKing data) is a state-of-the-art reporting platform developed with one goal in mind: to provide clients with a user-friendly IT system for analyzing data in-depth.

The easy to use web-based system provides access to key global market information 24 hours a day, 7 days a week.

The benefits of StarTrack at a glance:

- Global reporting platform - single source for all your reporting needs
- Secure, web-based, 24/7 access
- Flexible and fast
- Global consolidated product codes and model definitions
- One-click drill down to model level from every reporting cell

- Hierarchical reports, interactive navigation
- Global and selective report and chart distribution within your organization
- Early reports continuously updated through direct link with GfK database



STARTRACK
always in touch with your global markets



EncodeX is an online international product catalogue providing users with a standardized, detailed and independent platform for product information, available in over 25 countries and languages.

EncodeX contains all market active products with their technical features, detailed descriptions and images.

Benefits of using EncodeX are:

- Increased efficiency and improved cost effectiveness in using product information
- Immediate availability of over 3.4 million SKUs from more than 150 technical consumer product groups
- Complete market overview with continuous daily updates
- Easy and quick integration into your internal systems through the provision of standardized and structured information

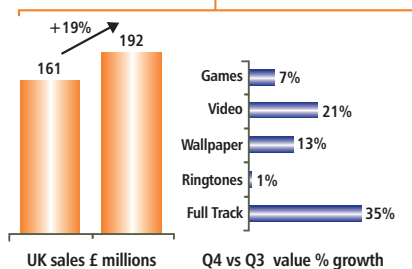
- Product range optimization with up-to-date prices and sales performance indicators
- Convincing design of product data sheets, price tags and product comparisons



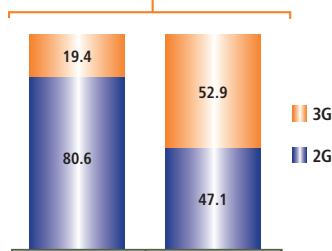
GfK track the sales of downloads and mobile content through a new company GfK m2, a joint venture between GfK and Media Control.

By receiving the data direct from both 'on' and 'off deck' portals GfK m2 are able to track the sales and values of mobile content markets down to title level. GfK m2 also analyze the device to which the content is downloaded to.

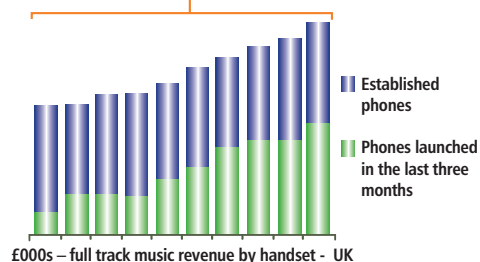
SURGING SALES OF MOBILE ENTERTAINMENT IN UK



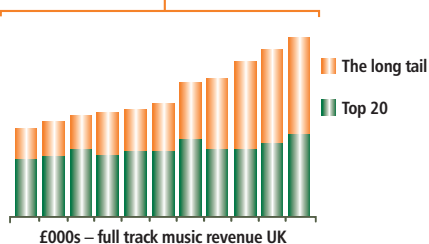
3G HANDSETS DOMINATE SPEND



NEW HANDSETS CHANGE BEHAVIOR



GROWTH THROUGH EXTENDING CATALOGUE

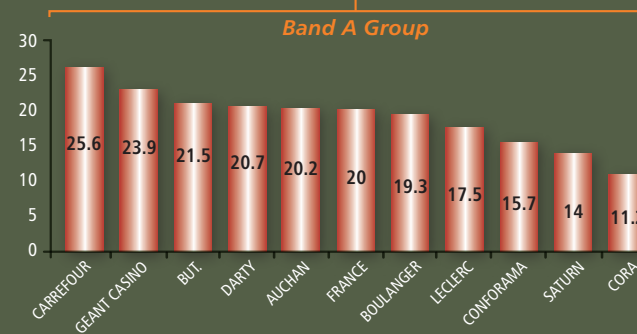


IFR Monitoring and Analysis provides reliable and up-to-date market information used by multi-national companies in strategic marketing planning and product development.

The IFR service presents a reflection of the market shelf offer as seen in the eyes of the consumer. The aim is to give an immediate report reflecting the changes in the market as they take place, highlighting trend shifts and abnormalities. Information is available by key account.

IFR is well established in operating an 'instant-data' service, presenting shelf monitoring and analysis of all prices and products present in over 2600 outlets in European countries, as well as Brazil, China and USA.

GLOBAL SHELF SHARE BY KEY ACCOUNT



GfK GROUP KEY FIGURES 2007



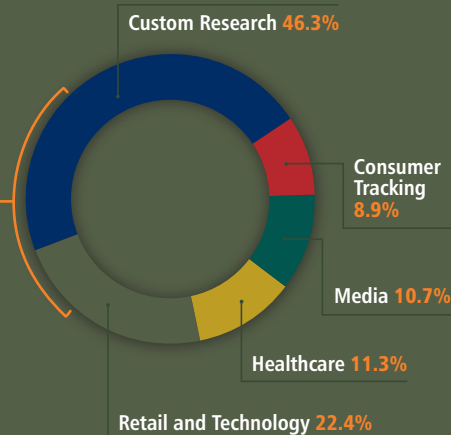
SALES

1.16 Billion Euros.

Which is a 5.8% rise on 2006 sales

SERVICES

- Comprehensive information services on consumer goods and services markets
- Research know-how
- Fact based Consultancy



Rounding differences may occur.
'Other' not taken into account on this chart.

EMPLOYEES

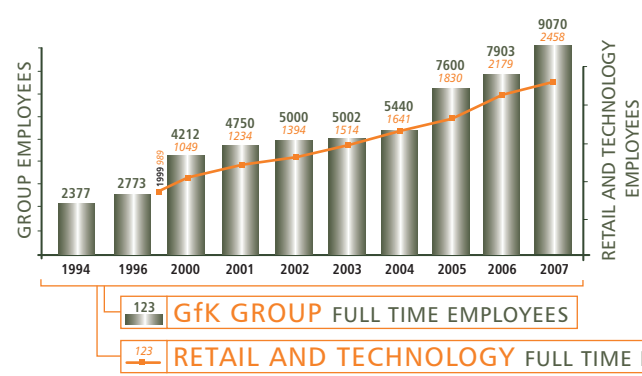
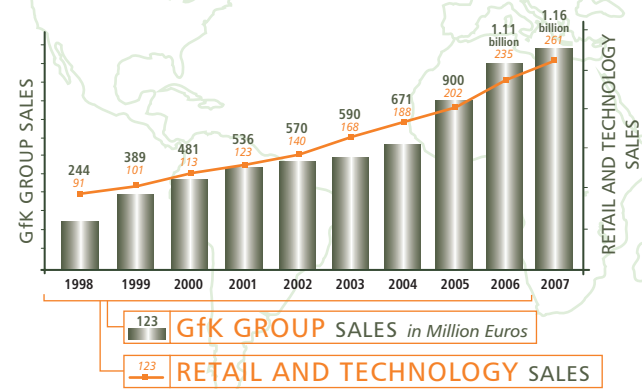
The GfK Group has more than 9,070 employees

NETWORK

115 companies in more than 100 countries

MARKET POSITION

5th largest market research company in the world



GLOBAL PLAYERS

- The Nielsen Company, USA
- IMS Health Inc., USA
- TNS Plc, UK
- The Kantar Group, UK
- GfK AG, Germany
- IPSOS Group SA, France

(Source: Honomichl Global)