



**GfK Mail Panel for households
and GfK Retail Panel for
electrical durables use for
REMODECE and similar projects.**

GfK. Growth from Knowledge

Till Herzog, Marketing Manager Retail and Technology

GfK

- **Agenda**

1

- **GfK Group – At a Glance**

2

- **GfK Retail Panels – How does it work?**

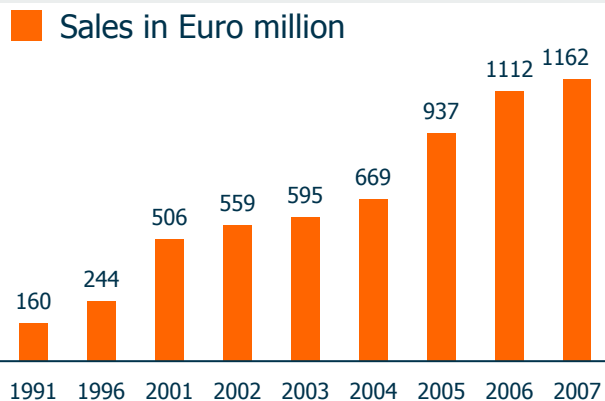
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- **GfK – Consumer Panels**

4

- **Conclusion**

GfK At a Glance



Established in 1934

1.2 bill EUR revenue, organic growth 5.8%

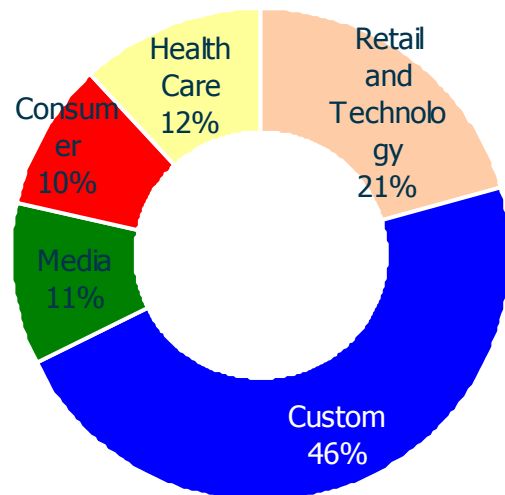
9,070 full-time employees

115 companies cover 100 countries

One-stop-shop for market research

5th largest MR company worldwide

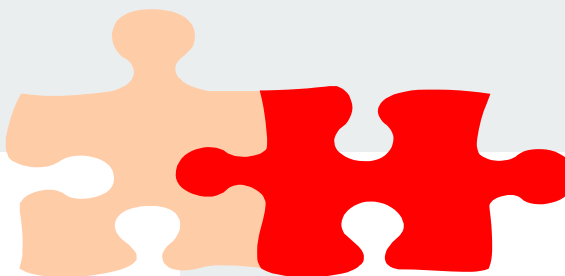
Pure Player in market research



Consumer and Retail Panels – complementary services

GfK

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- **Retail Panel**
- **POS data**
- **Weekly reports**
- **Volume, Value and Retail Price**
- **Granularity down to barcode level**
- **Price point analysis**
- **Total Store Analysis**

Tracking Fast Electrical Durables
through weekly EPOS sales and price
data

- **Consumer Panel**
- **Consumer segmentation**
- **Retailer share of trade, penetration, loyalty**
 - **Reason for purchase**
- **Satisfaction with retailers**
 - **Lost sales**
- **Ownership and spend**

Understanding consumer and the
individual retailer behaviour

Global Sales Research on Consumer Durable Markets

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Entertainment



Textiles



Luggage



Stationery



Watches



Home
textiles



Leather goods



Sport goods



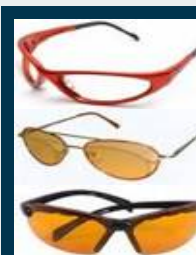
Furniture



Information
technology



Photo



Optics



Telecom
munication



Mobile Content



Consumer
electronics



DIY/Lamps



SDA/MDA/
Tableware



Gardening



Tourism



Automotive

250,000 shop worldwide deliver data every month/week to represent a universe of 1.2 million shops



Retail Panels, EPOS data translated into Total Market insight



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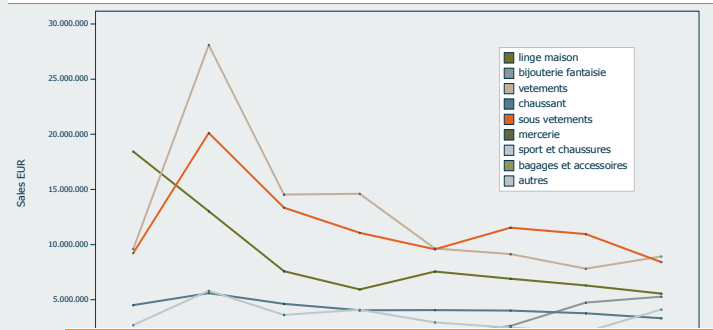
Data Providers (example)



Sales data feeds @ SKU level



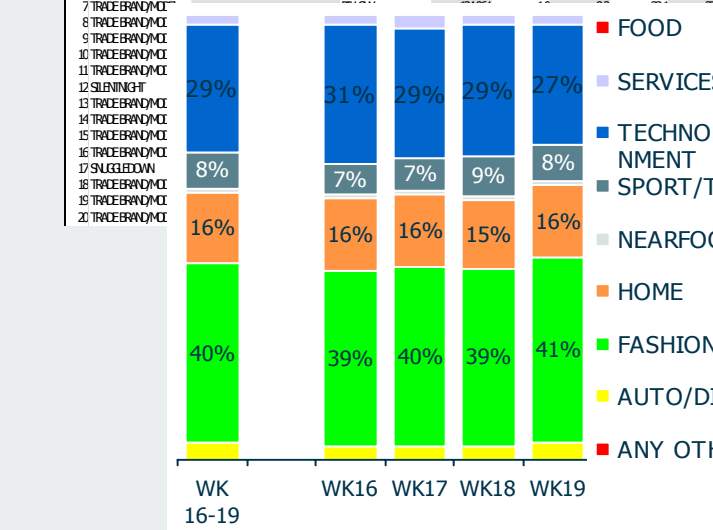
Clothing, Home Textiles, Personal Lifestyle, Shoes/Insoles, Sport, TS Fashion Life
Sales EUR
France Hypermarkets
W01 08 - W08 08



RETAIL AUDIT BEDDING GB MARCH 2008

HITLIST
BEDDING
TOTAL MARKET
SALES VALUE GBP, SALES VALUE %
MARCH 2008

NO	BRAND	MODEL	TYPE	TOTAL SALES VALUE GBP	TOTAL SALES VALUE %	TOTAL UNITS	TOTAL WEIGHT	TOTAL PRICE	TOTAL SALES PER SHOP
1	TRADE BRAND	MODEL	PILLOW	29,854	20	06	135	2051	2189
2	TRADE BRAND	MODEL	DUJET	199,851	15	31	12,7	6,44	97,3
3	TRADE BRAND	MODEL	PILLOW	189,792	14	30	125	795	788
4	TRADE BRAND	MODEL	DUJET	183,662	13	31	12,7	800	720
5	TRADE BRAND	MODEL	PILLOW	165,720	12	31	12,7	308	171,6
6	TRADE BRAND	MODEL	DUJET	145,420	11	24	11,1	998	600



Etc...

Energy consumption-related features coded by GfK (1)

GfK

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WASHINGMACHINES	ENERGY EFFICIENCY (EU) ENERGY CONSUMPTION (EU) WATER CONSUMPTION (EU) ENERGY STAR RATING (AUS) WATER RATING (AUS)
TUMBLEDRYERS	ENERGY EFFICIENCY (EU) ENERGY CONSUMPT/800RPM (EU) ENERGY CONSUMPT/1400RPM (EU)
DISHWASHERS	ENERGY EFFICIENCY (EU) ENERGY CONSUMPTION (EU) WATER CONSUMPTION (EU) ENERGY STAR RATING (AUS) WATER RATING (AUS)
COOLING	ENERGY EFFICIENCY (EU) ENERGY CONSUMPTION (EU) ENERGY STAR RATING (AUS)
FREEZERS	ENERGY EFFICIENCY (EU) ENERGY CONSUMPTION (EU) ENERGY STAR RATING (AUS)
WINE CABINETS	ENERGY CONSUMPTION (EU)
COOKERS/OVENS	ENERGY EFFICIENCY (EU)

Energy consumption-related features coded by GfK (2)

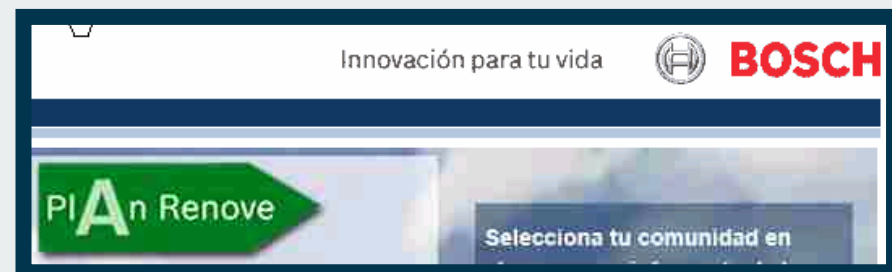
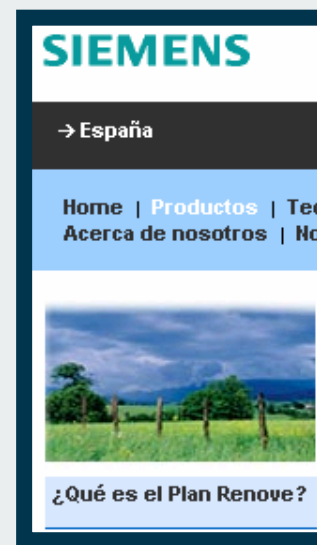
AIR CONDITIONER	ENERGY EFFICIENCY (EU) PERFORMANCE COEFFICIENT/COP (ASIA)
COMPACT FLUOR. LAMP	ENERGY EFFICIENCY TYPE (EU)
AUDIO HOME SYSTEMS	CONSUMPTION W/H
TUNER	CONSUMPTION W/H
AMPLIFIER	CONSUMPTION W/H
CRT-TV	CONSUMPTION W/H
VIDEORECORDER	CONSUMPTION W/H
TV-RECORDER	CONSUMPTION W/H
PTV/FLAT	CONSUMPTION W/H
DVD-PLAYER/RECORDER	CONSUMPTION W/H

Energy labels and subsidies: Case Study Spain

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- Explaining the effect of the introduction of the Spanish subsidy program ,Plan Renove'
- Consumers get minimum 50 € subsidy, if they buy a major domestic appliance rated ,A' or better.



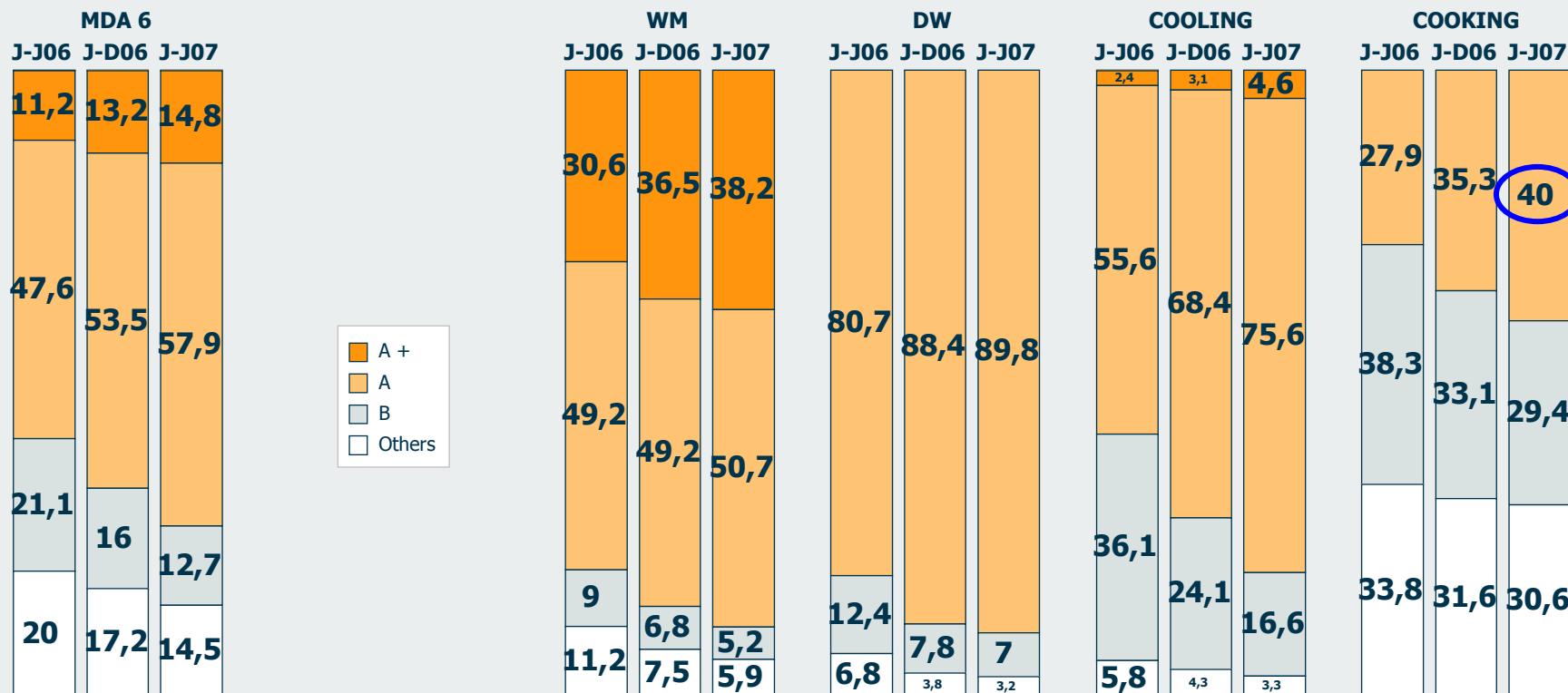
Sales Units %

Jan-Jun06/Jul-Dec06/Jan-Jun07

GfK Panelmarket Spain

MDA 6

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262	353	359	Sales Ths. Units A +	240	317	318	16	26	31
1.120	1.427	1.402	Sales Ths. Units A	385	426	423	262	303	306
497	427	308	Sales Ths. Units B	71	59	43	40	27	24

485	493	503	Price EUR A +	469	477	479	645	644	720
477	482	468	Price EUR A	376	371	356	474	469	470
353	363	368	Price EUR B	325	331	366	354	347	340

Highest potential for 'A' appliances in Cooking, where the labelling only started in 2000

Sales Units %

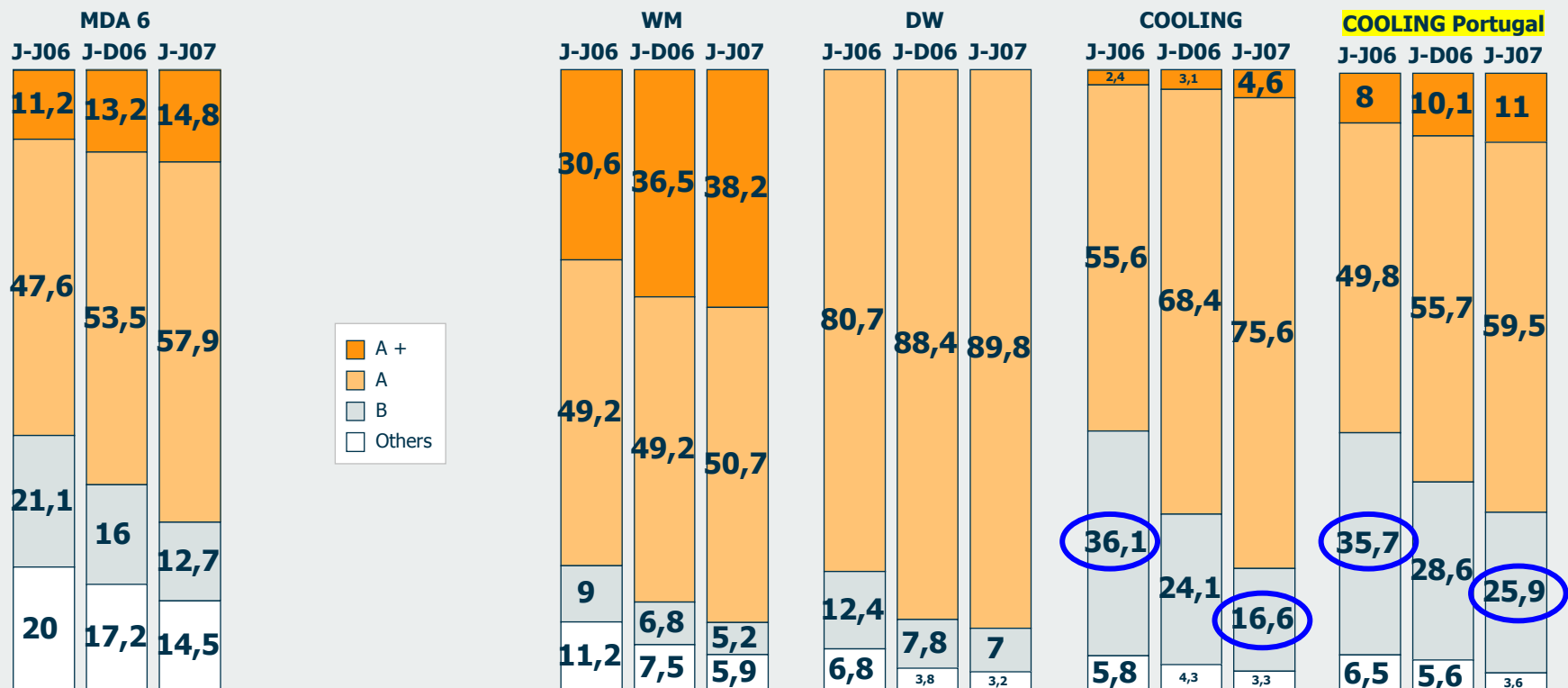
Jan-Jun06/Jul-Dec06/Jan-Jun07

GfK Panelmarket Spain

MDA 6

GfK

12



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485	493	503	Price EUR A +	469	477	479				645	644	720	560	521	525
477	482	468	Price EUR A	376	371	356	474	469	470	597	587	575	495	477	463
353	363	368	Price EUR B	325	331	366	354	347	340	408	409	409	294	293	277

Since the start of 'Plan Renove' (June 2006) the sales structure in ES improved significantly against PT.

Consumer Tracking: Key Services

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Share of sales: 9.6%



Focus

Information services on markets and marketing in relation to consumer habits and attitudes in **24 countries throughout Europe**

The advantage for clients

Clients can select standardized and customized key indicators and analyses to support, monitor and manage medium and long-term decisions on product and pricing policy, distribution and logistics, advertising and promotional activities

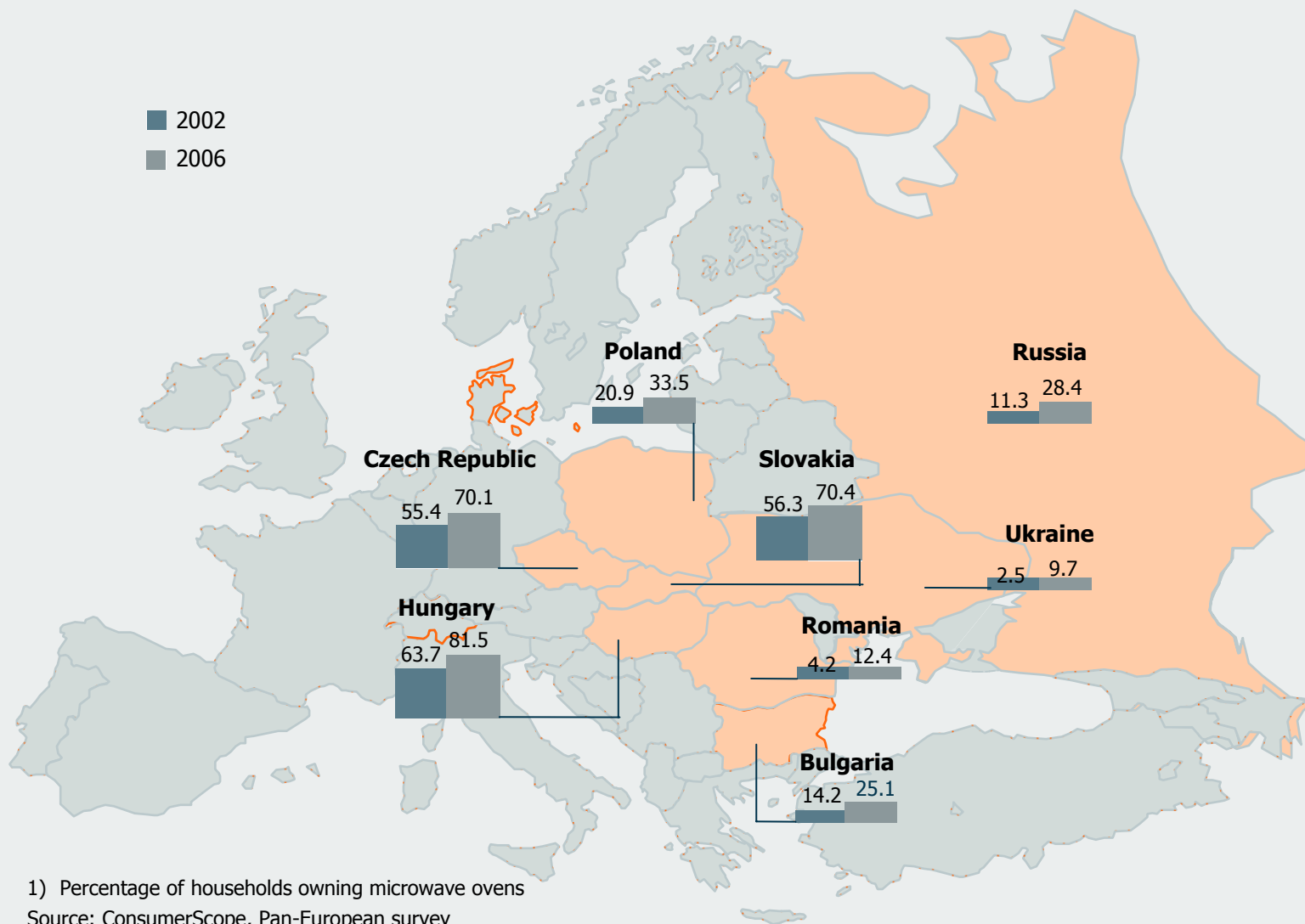
Market position

European No.2 in **continuous consumer research**; market leader in Benelux, Germany, Italy, Austria, Switzerland, Scandinavia and in Central and Eastern Europe

Microwaves in Europe¹⁾: household saturation 2002 vs. 2006

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■ 2002
■ 2006



1) Percentage of households owning microwave ovens

Source: ConsumerScope, Pan-European survey

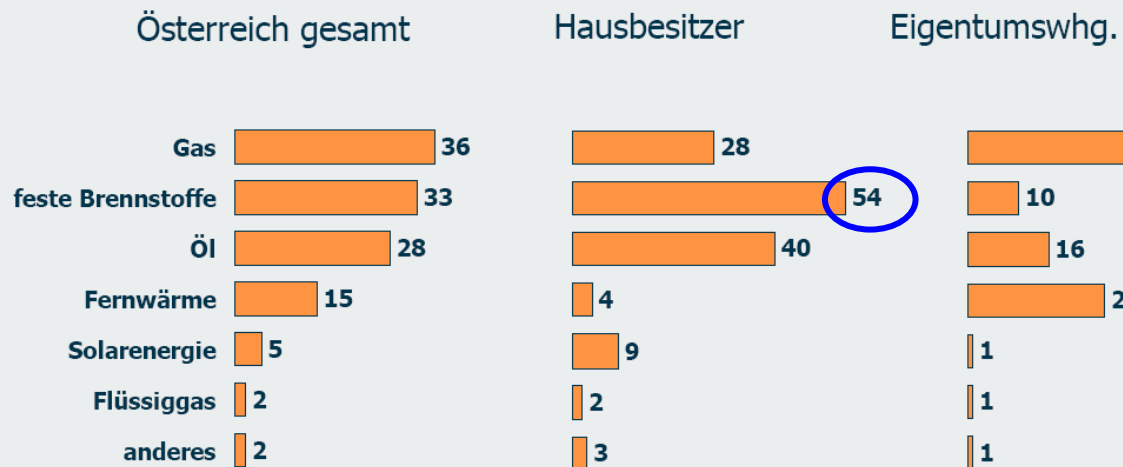
Research example: Fuel type and house vs. flat ownership

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- **Sample: 8.100 households representative for Austria**
- **Data collection: GfK**
- **Reporting: GfK**

GfK Gruppe Ad Hoc Forschung Energie

Genutzte Energieformen in österreichischen Haushalten



Majority of house owners use wood/coal for heating, whereas owners of flats prefer gas.

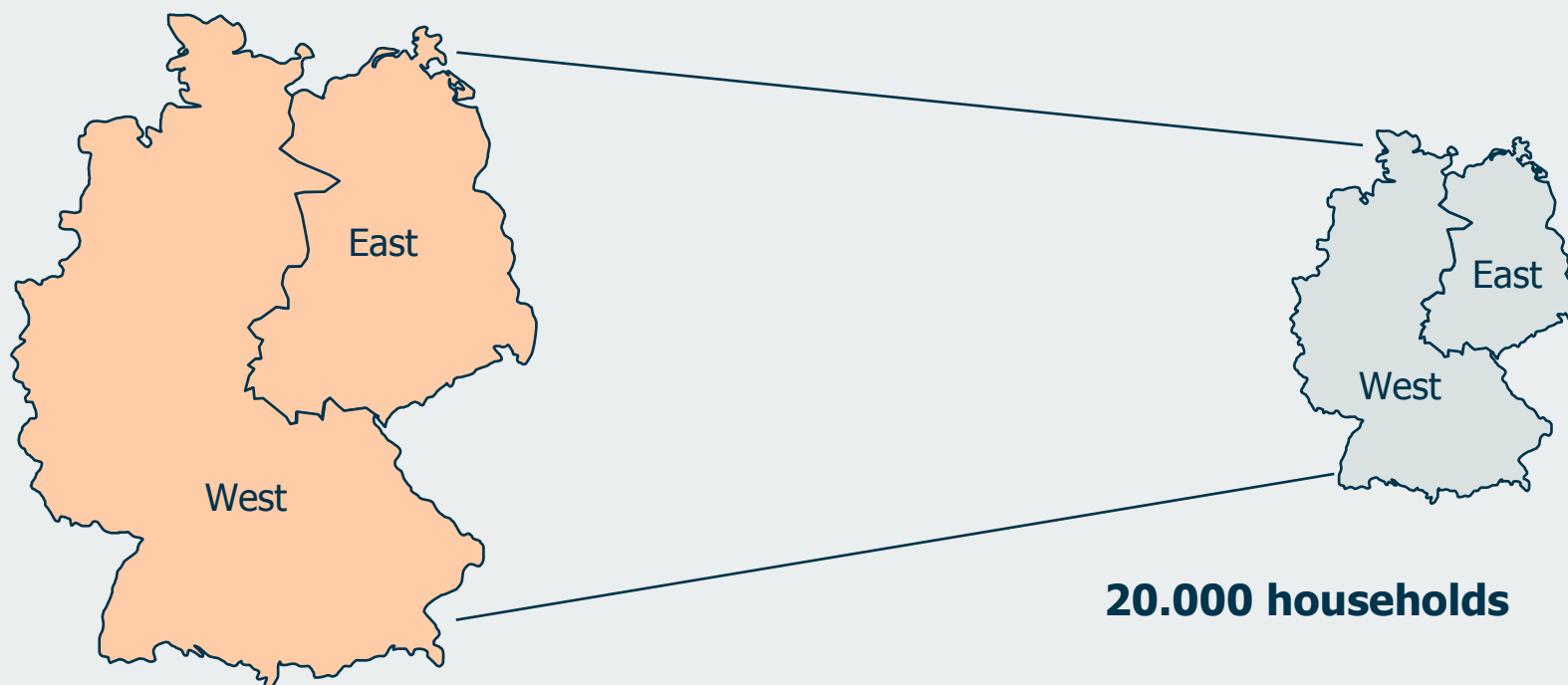
Quelle: Energiesensor, n=8100, Jänner 2002, Bevölkerung ab 15 Jahren

GfK Mailpanel - UNIVERSE

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The GfK Mailpanel comprises 20.000 Households.
Which represent the 36,2 Mio. private households in Germany



36,2 Million private german households

20.000 households

GfK Mailpanel at a glance

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The GfK Mailpanel...

- ... comprises 20.000 households
- ... 8.000 households reporting online
- ... 12.000 households reporting offline
- ... representative for 36,2 Million German households

The GfK Mailpanel can be used ...

- ... to conduct mailings with individual content
- ... to interview representatively single consumer or households
- ... to interview defined target groups e.g. age groups, education, income...
- ... to conduct monthly multi content interviews
- ... To conduct international comparable surveys



Nicht abgedeckt sind:

- ca. 2,8 Mio. ausländische Haushalte
- ca. 4,0 Mio. deutsche Personen, die nicht in privaten Haushalten leben z.B. in Seniorenwohnheimen, Kasernen, Gefängnissen, Klöstern, usw.)

- **Conclusion**

- 1 ▪ **Consumer and Retail data from one source**
- 2 ▪ **Worldwide comparable figures**
- 3 ▪ **Analysis down to article level**
- 4 ▪ **Harmonized methodology =>comparable data**



THANK YOU