

Press release

Date
November 24, 2011

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Locating clothing-related turnover in Germany

GfK GeoMarketing's study "GfK Retail Turnover for Clothing 2011" shows that the clothing-related turnover generated by some retail locations in Germany far exceeds local demand and purchasing power for this particular product line. The study also reveals regional variations in shopping preferences for women's, men's and children's clothing.

GfK GeoMarketing has released the study "GfK Retail Turnover for Clothing 2011", which shows the regional distribution of specialty-trade turnover for the retail clothing segment at the point of sale in Germany. GfK GeoMarketing calculates these clothing-specific regional turnover figures every two years for women's, men's and children's outerwear.

Unsurprisingly, highly populated regions generate a high level of clothing-related turnover: Germany's federal states of North Rhine-Westphalia, Bavaria and Baden-Württemberg together are responsible for 54 percent of Germany's stationary clothing retail trade and comprise around 50 percent of the nation's population.

However, the study also shows that some regions succeed in attracting shoppers from beyond the immediate vicinity: With around 1.8 mil. inhabitants, the city-state of Hamburg ranks 13 among Germany's 16 federal states in terms of population; however, it ranks 8 in terms of clothing-related turnover and enjoys just under a four percent share of the turnover for Germany's clothing sector.

While higher numbers of inhabitants generally equate to higher clothing-related turnover, this isn't always true: Some locations with lower numbers of inhabitants generate more turnover than others with far larger populations.

Top five districts with more than 500,000 inhabitants according to difference in inhabitants (INH) ranking and clothing turnover ranking

ranking difference INH ranking - turnover ranking	urban district	inhabitants	retail turnover for clothing in %*	ranking by turnover	ranking by inhabitants
11	Nuremberg	503,673	15.6	9	20
4	Bremen	547,685	12.2	10	14
2	Stuttgart	601,646	19.4	6	8
2	Düsseldorf	586,217	16.1	8	10
2	Leipzig	518,862	10.1	14	16

Source: GfK Retail Turnover for Clothing 2011, © GfK GeoMarketing

*(Germany = 1,000 %)

Top five districts with 300,000 - 500,000 inhabitants according to difference in inhabitants (INH) ranking and clothing turnover ranking

ranking difference INH ranking - turnover ranking	urban district	inhabitants	retail turnover for clothing in %*	ranking by turnover	ranking by inhabitants
42	Mannheim	311,969	11.5	12	54
29	Bonn	319,841	7.6	20	49
21	Saarbrücken	333,469	7.0	23	44
12	Bielefeld	323,084	5.3	36	48
9	Bochum	376,319	6.9	24	33

Source: GfK Retail Turnover for Clothing 2011, © GfK GeoMarketing

*(Germany = 1,000 %)

Top five districts with 100,000 - 300,000 inhabitants according to difference in inhabitants (INH) ranking and clothing turnover ranking

ranking difference INH ranking - turnover ranking	urban district	inhabitants	retail turnover for clothing in %*	ranking by turnover	ranking by inhabitants
254	Trier	104,587	4.4	50	304
253	Koblenz	106,445	5.0	43	296
233	Erlangen	105,554	3.6	68	301
223	Ulm	122,087	5.2	37	260
198	Ingolstadt	124,387	4.1	53	251

Source: GfK Retail Turnover for Clothing 2011, © GfK GeoMarketing

*(Germany = 1,000 %)

Top five districts with 50,000 - 100,000 inhabitants according to difference in inhabitants (INH) ranking and clothing turnover ranking

ranking difference INH ranking - turnover ranking	urban district	inhabitants	retail turnover for clothing in %*	ranking by turnover	ranking by inhabitants
311	Kempten (Allgäu)	62,007	3.5	71	382
304	Passau	50,627	2.8	90	394
285	Rosenheim	60,877	2.6	99	384
280	Aschaffenburg	68,722	2.7	93	373
276	Landshut	62,735	2.5	105	381

Source: GfK Retail Turnover for Clothing 2011, © GfK GeoMarketing

*(Germany = 1,000 %)

Turnover versus product-line purchasing power

Some interesting insights emerge not just from the study's comparison of clothing-related turnover with population numbers, but also from the comparison of regional turnover with local purchasing power for clothing. The turnover figures are calculated at the point of sale, while the purchasing power figures are calculated at the place of residence. "A comparison of our current clothing-related retail turnover study with our 2011 study on purchasing power for retail product lines shows that turnover distribution differs extensively from the distribution of potential at consumers' places of residence," explains GfK retail expert Oliver Giehsel. "Consumers prefer to shop in cities. By contrast, purchasing power is often higher in the more rural communities surrounding cities than in the cities themselves. Retailers thus need both market indices in order to optimally steer their marketing, sales and location planning."

Potential for women's, men's and children's clothing unequally distributed

Women also purchase clothing for their partners and children, so the "GfK Retail Turnover for Clothing" study doesn't reveal whether specific retail locations are more favored by women or men. Even so, the study makes it clear that there are substantial shopping preferences among the women's, men's and children's outerwear segments, apparent in the widely varying distribution of both purchasing power and retail turnover.

The urban district of Munich leads the way when it comes to purchasing power for women's outerwear (index: 137), outpacing the Hochtaunuskreis district (index: 135.1) and Main-Taunus-Kreis district (index: 129.8). However, Munich only ranks fourth with regard to purchasing power for men's outerwear (134), placing behind Hochtaunuskreis district (147.1), Main-Taunus-Kreis district (141.2) and the rural district of Starnberg (139). By Munich standards, the Bavarian capital falls far behind in terms of the children's outerwear segment, ranking 137 (index: 111.5). The top place in this segment is held by the rural district of Starnberg (153.4), followed by the rural district of Munich (148.8) and the rural district of Ebersberg (147).

Top 10 districts for turnover for women's outerwear (WO)

district	inhabitants 15 years and older, female	retail turnover for WO in mil. €	retail turnover for WO in %*	purchasing power for WO in mil. €
Berlin	1,553,118	861.0	58.7	766.8
Munich	605,426	619.4	42.2	441.5
Hamburg	797,006	566.5	38.6	492.5
Cologne	451,538	394.4	26.9	282.5
Frankfurt a.M.	300,012	321.1	21.9	194.7
Stuttgart	267,469	283.5	19.3	170.1
region Hannover	508,322	243.3	16.6	300.6
Düsseldorf	271,086	232.2	15.8	177.2
Nuremberg	230,325	223.7	15.3	134.9
Mannheim	138,128	175.2	12.0	78.5

Source: GfK Retail Turnover for Clothing 2011, © GfK GeoMarketing

*(Germany = 1,000 %)

The urban district of Mannheim ranks tenth in turnover generated by women's outerwear, but only 50 in purchasing power for women's outerwear. With a per-capita index of 103.9, Mannheim's purchasing power for this segment is only slightly above average. The city has a slightly below-average purchasing power for men's outerwear (index: 97.8) and significantly below-average purchasing power for children's outerwear (87).

The urban district of Mannheim only ranks 13 in turnover share generated by men's outerwear, which is three places below its ranking for the women's outerwear segment.

Top 10 districts for turnover for men's outerwear (MO)

district	inhabitants 15 years and older, male	retail turnover for MO in mil. €	retail turnover for MO in %*	purchasing power for MO in mil. €
Berlin	1,472,134	421.9	61.7	336.5
Munich	557,554	333.0	48.7	208.9
Hamburg	750,062	290.4	42.5	223.1
Cologne	415,816	169.0	24.7	130.0
Frankfurt a.M.	283,870	165.0	24.1	87.0
Stuttgart	259,763	135.4	19.8	77.7
region Hannover	470,685	118.7	17.4	143.4
Düsseldorf	241,769	117.6	17.2	82.6
Nuremberg	211,812	114.5	16.7	60.5
Bremen	230,627	89.0	13.0	60.8

Source: GfK Retail Turnover for Clothing 2011, © GfK GeoMarketing

*(Germany = 1,000 %)

About the study

The "GfK Retail Turnover for Clothing" study reveals the regional distribution of specialty-trade clothing turnover generated at the point of sale. The study differentiates

between turnover generated by women's, men's and children's outerwear. Not taken into account are direct sales from manufacturers to consumers and turnover related to wholesale, groceries, convenience stores and mail-order retail.

The study includes data on all of Germany's municipalities with more than 40,000 inhabitants, rural and urban districts, postal directing areas and federal states. The turnover figures are evaluated based on end-consumer prices and reflect 2010 demand levels. In order to produce as accurate an assessment of demand as possible, turnover generated by chains and corporations is considered part of the overall turnover generated by the region in question.





The "GfK Retail Turnover for Clothing" study is an important indicator of the economic drawing power of a given location. As such, it is an indispensable resource for planning new locations and managing external sales forces. Companies can also use the dataset to pinpoint the most promising point-of-sale locations around which to concentrate their marketing and sales efforts.

Additional information on GfK Retail Turnover for Clothing can be found at www.gfk-geomarketing.com/clothing.

Print-quality illustrations can be found at www.gfk-geomarketing.com/turnover-clothing-2011.

About GfK GeoMarketing

GfK GeoMarketing is one of the largest providers of geomarketing services in Europe for customers and users from all branches of trade. Key business areas include:

-  Consultancy and reports
-  Market data
-  Digital maps
-  Geomarketing software RegioGraph

GfK GeoMarketing is a subsidiary of the globally active GfK Group. Ranked fifth among the world's market research institutes, the GfK is represented in more than 100 countries by over 11,000 employees.