

Press release

Date
January 17, 2012

Press contact:
Cornelia Lichtner

Contact info.
Tel.: +49 (0)7251 9295270
Fax: +49 (0)7251 9295290

E-mail
c.lichtner@gfk-geomarketing.com

New GfK study reveals socio-demographic structures in Germany

GfK GeoMarketing annually releases the "GfK Demographics" study, which calculates the regional distribution of household types, income brackets and accommodation types in Germany. According to the 2011 data, Berlin has the largest share of young people among Germany's federal states, while Baden-Württemberg has the most families with children. One- to two-family houses are most common in Saarland.

Family types

The percentage of Germany's single-person households in 2011 was 39.6 percent - about the same as the preceding year. With a share of this group amounting to 57 percent, the urban district of Regensburg once again places first among Germany's districts. This percentage is significantly greater than the second-ranked district of Berlin at 53.7 percent. However, Berlin continues to lead the pack among Germany's federal states, outpacing the city states of Hamburg and Bremen with 50.3 and 48.6 percent respectively. With 35.4 percent, Rhineland-Palatinate is the federal state with the lowest share of single-person households.

While single-person households tend to be concentrated in large cities or cities with universities, family households with children are often particularly numerous in rural areas. With 42.3 percent, the rural district of Landshut in Bavaria has the highest share of children. In 2011, the share of Germany's multiple-person households without children was 31.2 percent, which, as in the previous year, exceeded the amount of households with children (29.2 percent). With 32.2 percent, Baden-Württemberg leads the way among Germany's federal states with the highest share of households with children, with Berlin in last place at 21 percent.

"Our study confirms that the socio-demographic profile of the German population is changing," explains Simone Baecker-Neuchl, head of GfK GeoMarketing's market data & research division. "The share of families with children is declining, while the average age of the population is increasing. Because our study focuses on *regional* variations in socio-demographic characteristics, the results also reveal several redistribution trends: The share of older citizens in rural regions is increasing, but the share of family households in urban areas is also on the rise."

GfK GeoMarketing GmbH

www.gfk-geomarketing.com
info@gfk-geomarketing.com

Bruchsal headquarters:
Werner-von-Siemens-Str. 9
Building 6508
76646 Bruchsal
Tel.: +49 (0)7251 9295100
Fax: +49 (0)7251 9295290

Hamburg office:
Herrengaben 3-5
20459 Hamburg
Tel.: +49 (0)40 570132520
Fax: +49 (0)40 570132599

Nuremberg office:
Nordwestring 101
90419 Nuremberg
Tel.: +49 (0)911 3952509
Fax: +49 (0)911 3954054

Managing directors:
Wolfram Scholz
Dr. Eberhard Stegner

Mannheim County Court
HRB 250872
Ust-ID: DE 143585033

Age distribution

At 34.9 percent, senior households (60 and older) comprise Germany's best represented group, followed by 40-49 year-olds at 21.2 percent, 50-59 year-olds at 17.4 percent and 30-39 year-olds at 15 percent. Young households under 30 are the nation's least numerous group at 11.5 percent.

As in previous years, the highest share of young households can be found in the city-state of Berlin: 15.7 percent of all households here belong to this category - almost 36 percent more than the national average. The federal state of Berlin also has the lowest average age of household heads at 47.8 years. By contrast, household heads in the federal state of Saarland have an average age of 50.2 years. Saarland correspondingly has the highest share of senior households (39 percent) in the nation, followed by Saxony-Anhalt at 37.6 percent and Saxony at 37.2 percent.

Income levels

The GfK Demographics study also reveals the socio-economic levels of all households of a given region. These are grouped into seven brackets depending on the amount of available monthly income.

Germany's income distribution:

Monthly net household income	Share as a %
up to under €1,100	14.1
€1,100 to under €1,500	11.8
€1,500 to under €2,000	14.4
€2,000 to under €2,600	14.5
€2,600 to under €4,000	23.2
€4,000 to under €7,500	18.7
€7,500 and higher	3.4

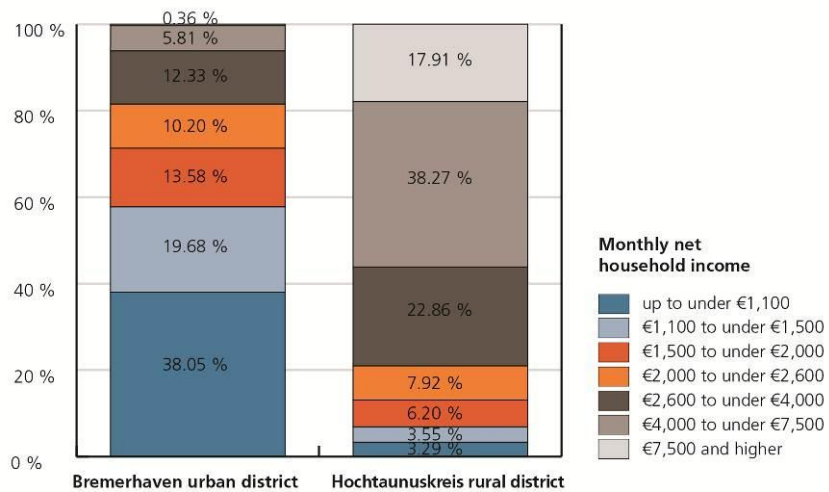
Source: GfK Demographics 2011, © GfK GeoMarketing

Among Germany's federal states, Berlin has the highest share of households with a monthly net income of under €1,100: 24.7 percent of all households there fall into this income bracket, which is almost 75 percent more than the national average. The federal state of Baden-Württemberg has the lowest share of low-income earners at 9.8 percent. At 4.5 percent, Baden-Württemberg ranks third in terms of top-income earners with a monthly net income of more than €7,500. The top spot in this regard goes to Hesse at 5.3 percent, followed by Bavaria at 4.7 percent.

The spread of statistical values increases as one compares the data at an ever more detailed regional level. Clear forerunners in terms of top-income earners among Germany's urban and rural districts are Hochtaunuskreis, Main-Taunus-Kreis and Starnberg, with shares ranging from 16.2 to 17.9 percent. The district with the greatest share of low-earning households is Bremerhaven at 38.1 percent, followed by Demmin rural district at 33.1 percent and Trier urban district at 30.5 percent.

The data reveals significant differences in income levels:

Germany's income distribution



Source: GfK Demographics 2011, © GfK GeoMarketing

Accommodation types

Significant regional differences are also discernible in terms of accommodation types: The share of 1-2 family houses is only 55.2 percent in Berlin, which is around 33 percent less than the national average. By contrast, the share of 1-2 family houses in Saarland is almost nine percent more than the average and constitutes 90.3 percent of all accommodation types in this federal state. A detailed comparison of the regional data again reveals even greater extremes: The share of 1-2 family houses in the rural district of Dingolfing-Landau is 96.7 percent, but only 47 percent in the urban district of Gelsenkirchen.

Among Germany's federal states, Berlin once again has a six percent share of 20-and-more family houses, which corresponds to an astronomical index of 1,289.2 (an index of 100 is the national average). At 1.5 percent, Hamburg is a distant second, while the

other federal states have shares ranging only from 0.2 to 0.6 percent. A similar spread characterizes the share of 7-19 family houses: Berlin is again the clear leader with a share of 23.9 percent; Hamburg is in second place with a share of 17.2 percent, while Saarland is in last place with less than two percent of all accommodation types falling into this category. In terms of 3-6 family houses, Saxony takes the top spot with 16.6 percent, beating out Bremen at 15.7 percent. Last place in this regard is Schleswig-Holstein at 7.6 percent.

The GfK study also yields insight into the distribution of commercial buildings in Germany: Saarland only has around 7,488 dedicated commercial buildings, while Bremen has 5,193. North Rhine-Westphalia has just under 124,000, which is almost 24 as many as Bremen. A comparison of the number of inhabitants with the number of commercial buildings is even more insightful. Berlin is once again first in this regard with 2.78 dedicated commercial buildings per 100 inhabitants, followed by Hamburg with 1.64 and North Rhine-Westphalia with 1.44. Saarland ranks fifth out of Germany's 16 federal states with 1.37, while Bremen is in the middle of the field with 1.27. Last place goes to Mecklenburg-Western Pomerania, which has precisely one dedicated commercial building per 100 inhabitants.

About the study

The "GfK Demographics" study examines socio-demographic factors and is calculated for a range of regional administrative levels. It provides information on Germany's population and households according to household type (e.g., single- and multiple-person with or without children, immigrant households, etc.), household age (i.e., age of household head), income level (divided into seven brackets), as well as accommodation type (e.g., 1-2-family houses, etc.).

The GfK Demographics data is used by marketing and sales divisions for locating target groups. The data reveals the best areas in which to concentrate marketing and sales campaigns.





The GfK Demographics 2011 study is available from GfK GeoMarketing for all of Germany's urban and rural districts, municipalities, postcodes, streets and 2.6 million street segments.

Print-quality illustrations can be found at:
www.gfk-geomarketing.com/demographics_2011

For additional information, visit:
www.gfk-geomarketing.com/demographics

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. One of the world's leading market research institutes, the GfK is represented in more than 100 countries by over 11,000 employees.