

## Press release

Date  
June 7, 2011

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# GfK Retail Purchasing Power Germany 2011: Average of €5,329 available per inhabitant

**GfK GeoMarketing's forecasted 2011 retail purchasing power levels for Germany vary dramatically according to region: The average disposable income available for retail purchases ranges from just under €6,900 in Hochtaunuskreis to around €4,240 in the district of Uecker-Randow.**

With a per capita retail purchasing power of €5,329, Germans devote around 27 percent of their total purchasing power to retail purchases. While this percentage is lower than those of most neighboring countries, Germany's retail sector is nonetheless predicted to generate a nominal total turnover of around €400 billion.

GfK Retail Purchasing Power reveals the consumption potential in the classic retail and mail-order retail sectors for all regions of Germany, from federal states and districts to municipalities and five-digit postcodes. Inhabitants with higher levels of income do not necessarily spend more on retail purchases than inhabitants with less purchasing power: An above-average income sometimes entails large expenditures on rent, real estate and luxury goods.

"GfK Retail Purchasing Power pinpoints the regions that drive the local retail sector," explains Simone Baecker-Neuchl, market data expert at GfK GeoMarketing. "For targeted marketing actions and the planning of retail locations, it's essential to be close to consumers and know how much of their disposable income is available for retail purchases. The spending potential at consumers' places of residence is, of course, even more decisive in the rapidly growing online retail trade than in conventional retail."

### Germany's retail purchasing power rankings

Top-ranked districts in terms of general purchasing power also make the list of Germany's 10 districts with the highest 2011 retail purchasing power according to inhabitants.

However, the sequence varies slightly: The urban district of Munich moves to second place (general purchasing power ranking: 5) and the urban district of Düsseldorf

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penetrates into the top 10 (general purchasing power ranking: 12); Baden-Baden just misses the top 10 and falls to position 11 (general purchasing power ranking: 18).

### GfK Retail Purchasing Power 2011: Top 10 districts according to inhabitants

Rank	Urban district / rural district	Inhabitants	Retail purchasing power per inhabitant in €	Retail purchasing power index
1	Hochtaunuskreis rural district	226,290	6,896	129.4
2	Munich urban district	1,330,440	6,805	127.7
3	Starnberg rural district	130,010	6,693	125.6
4	Main-Taunus-Kreis rural district	226,647	6,614	124.1
5	Munich rural district	319,573	6,564	123.2
6	Ebersberg rural district	127,907	6,354	119.2
7	Erlangen urban district	105,554	6,262	117.5
8	Fürstenfeldbruck rural district	203,129	6,252	117.3
9	Düsseldorf urban district	586,217	6,248	117.2
10	Stormarn rural district	228,327	6,241	117.1

### International comparison

The varying spending habits across Europe are closely tied to each country's price structures and propensity to consume: In countries with low per-capita incomes, people spend a proportionally higher amount of their purchasing power on retail purchases in order to cover their basic needs. By contrast, in countries with high income levels, the prices for accommodation and services are substantially higher, resulting in a lower share of retail purchasing power.

Country	Inhabitants	2011 per capita purchasing power in €	2011 per capita retail purchasing power in €	Retail purchasing power as a share of general purchasing power
Germany	81,802,257	19,684	5,329	27%
Spain	47,021,031	13,441	4,184	31%
Norway	4,920,305	29,028	9,017	31%
Poland	38,186,860	6,050	2,222	37%

Additional factors worth bearing in mind are the widely divergent shopping cultures, lifestyles and pricing levels. For example, Germans are notoriously frugal and devote only 27 percent of their total purchasing power to retail purchases.

Despite their high purchasing power, Norwegians devote the same share of their income to consumption-related expenditures as Spaniards, who have a middling level of purchasing power. However, in absolute terms, Norwegians spend more than twice as much (€9,017) on groceries and consumer items than Spaniards. The Scandinavian model of high taxation and social security contributions along with substantial public services and financial security results in a proportionally small share of income spent on retirement provisions. The breakdown of expenditures thus varies starkly between these

two countries: Inhabitants of Spain spend the majority of their retail purchasing power on groceries and luxury food items, while Norwegians have substantially more purchasing power available for things like DIY products.

### **About the study**

The data reveal the portion of general GfK Purchasing Power that is available for retail and mail-order retail expenditures. GfK Purchasing Power is the sum of the net income of the population according to place of residence. Consumers spend this disposable income in a variety of ways, including retail purchases, rent, mortgages, insurance, car-related expenditures, travel and services.

The calculation of GfK Retail Purchasing Power for Germany takes into account expenditures on groceries and luxury food items, clothing, shoes and household items (including furniture, flooring, household electrical appliances, textiles, gardening articles, cleaning supplies), health- and body care, educational items, entertainment (e.g., TVs, radios, books, photography supplies, magazines, toys, sporting goods) and luxury goods (watches, jewelry, etc.). Purchases related to cars, fuel, services and repairs are not taken into account. The regional retail purchasing power data for European countries is available down to the most detailed administrative and postal levels.

The income figures are calculated on the basis of income tax statistics and take into account government subsidies such as pension payouts, unemployment benefits, housing assistance, child support and educational grants.

### **Additional information**

on the GfK Retail Purchasing Power study can be found at [www.gfk-geomarketing.com/retail-purchasing-power](http://www.gfk-geomarketing.com/retail-purchasing-power).





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### **Print-quality illustrations**

can be found at [www.gfk-geomarketing.com/retail-pp-2011](http://www.gfk-geomarketing.com/retail-pp-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
-  Market data
-  Digital maps
-  Geomarketing software RegioGraph

GfK GeoMarketing is a subsidiary of the globally active GfK Group. Ranked fourth among the world's market research institutes, the GfK is represented by approximately 10,000 employees belonging to more than 115 subsidiaries located in 100 countries.