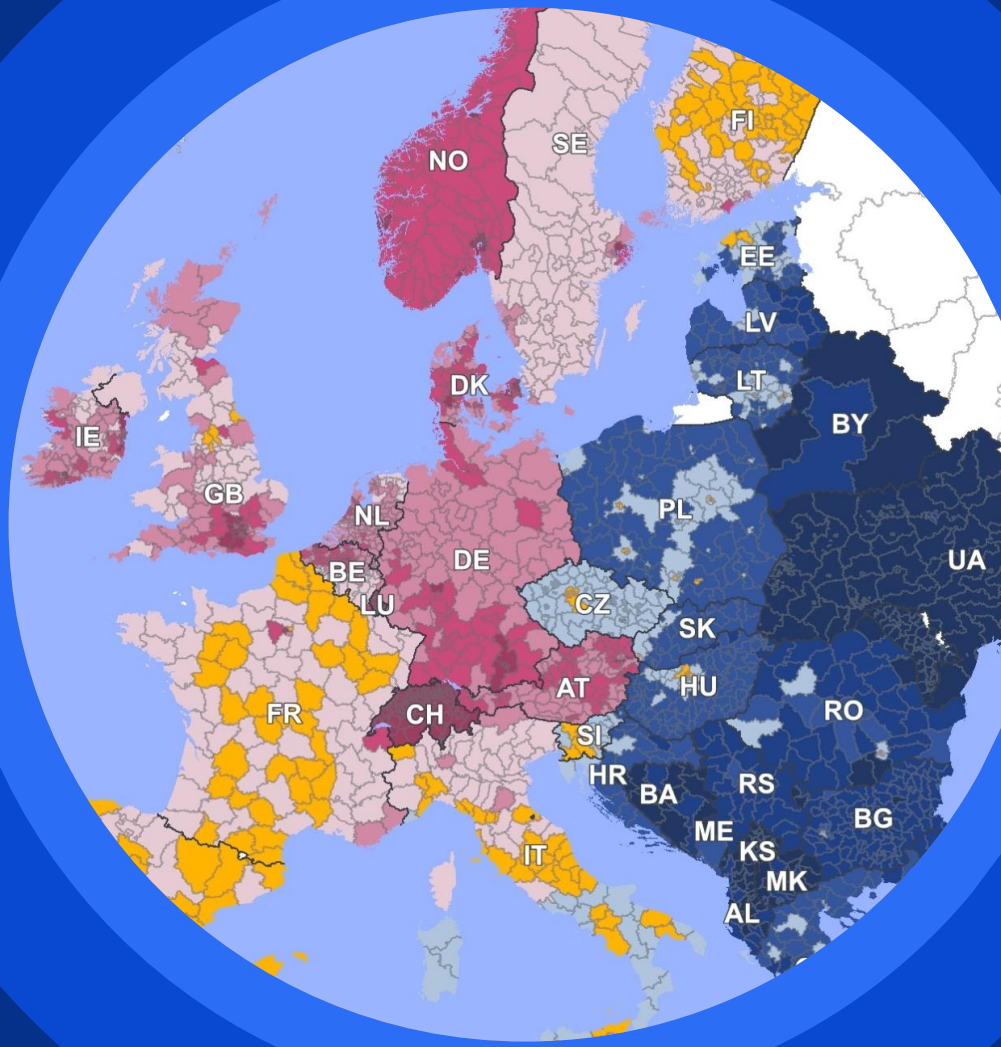
Europe Edition 2026/2027

Benefit from the power of location with up-to-date geodata for all Europe!

Carsten Buchart & Oliver Pape



NIQ Geomarketing

powered by GfK intelligence

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Agenda



Map Edition Europe 2026/2027



Purchasing power: benchmark for assessing consumer potential



Purchasing Power data in action



Questions & Answers

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Map Edition Europe 2026/2027

NIQ's Europe Edition 2026/2027 reflects the thousands of changes to postcode and administrative levels that occurred in almost all European countries.



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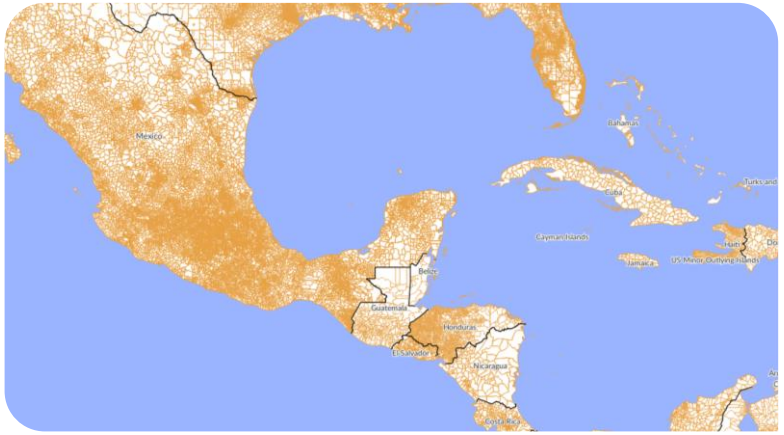
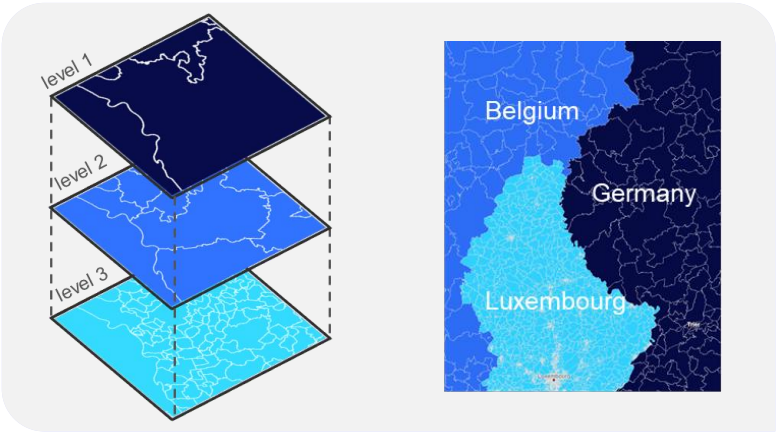
NIQ Geomarketing - Worldwide Digital Maps

What makes NIQ map products so special?



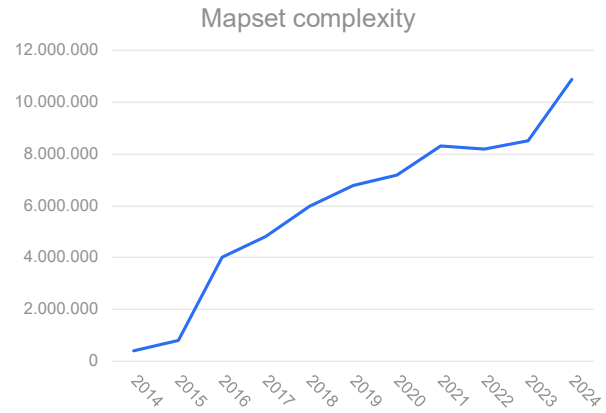
Global Coverage

- Worldwide digital maps from over 240 countries
- Postcode and administrative boundaries
- CRESTA Zones



Seamless in Every Aspect

- Vertically seamless - each area nests perfectly within its larger region
- Horizontally seamless - No gaps or overlaps between adjacent areas



Highly Detailed and Precise

- Inhouse production of NIQ boundary data to ensure data harmonization
- More than 280 postal boundaries layers
- More than 620 administrative boundaries layers

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Digital maps Europe 2026

New 2-Year Country Update Cycle

14 Countries

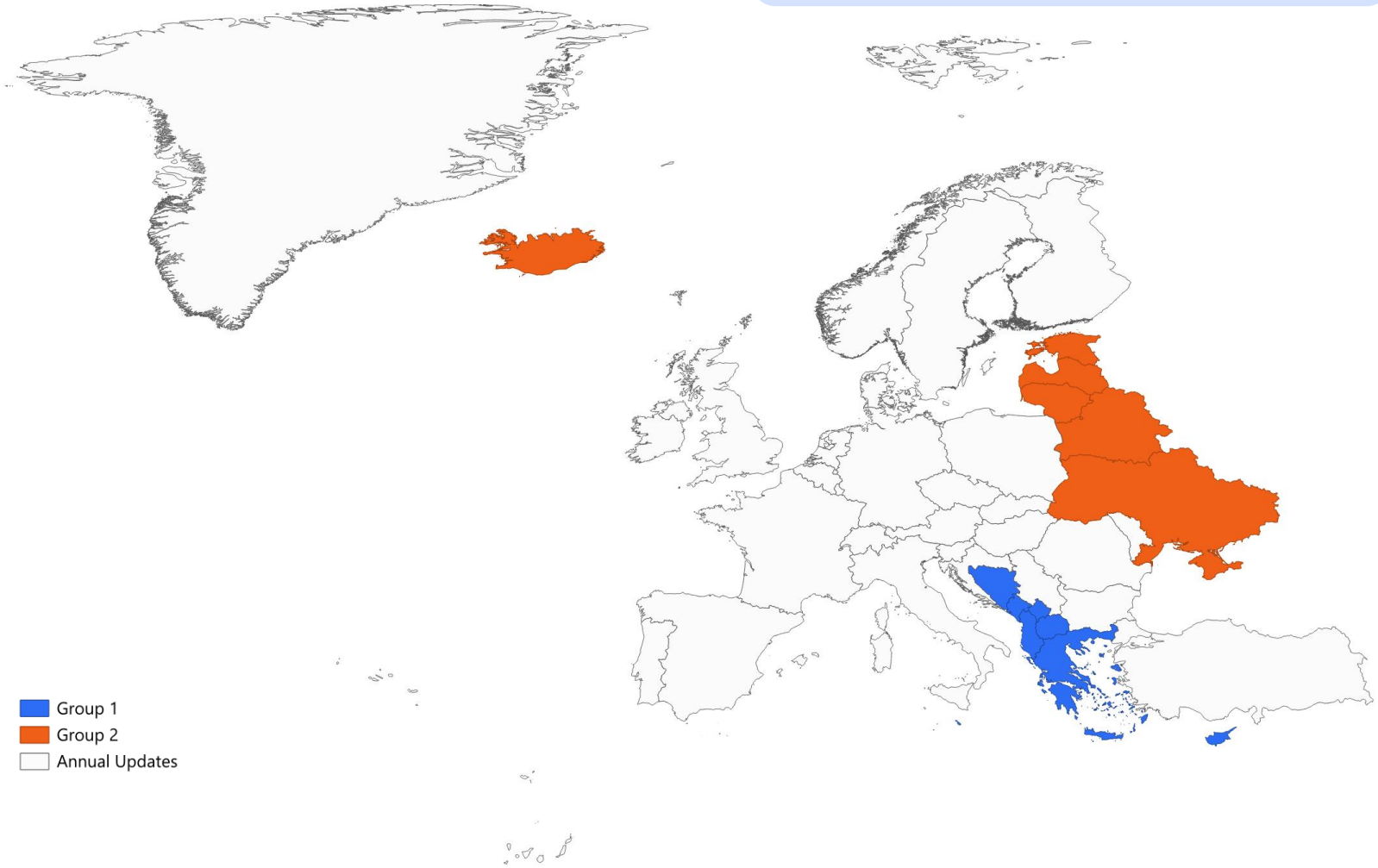
Updated on a new 2-year cycle

2026 Updated countries

- Albania
- Bosnia and Herzegovina
- Cyprus
- Greece
- North Macedonia
- Malta
- Montenegro
- Kosovo

2027 Updated countries

- Belarus
- Estonia
- Iceland
- Lithuania
- Latvia
- Ukraine



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Digital maps Europe 2026

New additions/changes per country



United Kingdom

- Guernsey
- Jersey and
- Isle of Man

are now split off into sub-countries and shipped with United Kingdom in separate sub-folders.



Croatia

One extensively reworked postcode layer available:

- **5-digit postcode areas** (902 features, added 597 features)



Belgium

Country re-built based on new ADM layer

- **statistical sectors** (20,781 features)

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Examples for single countries

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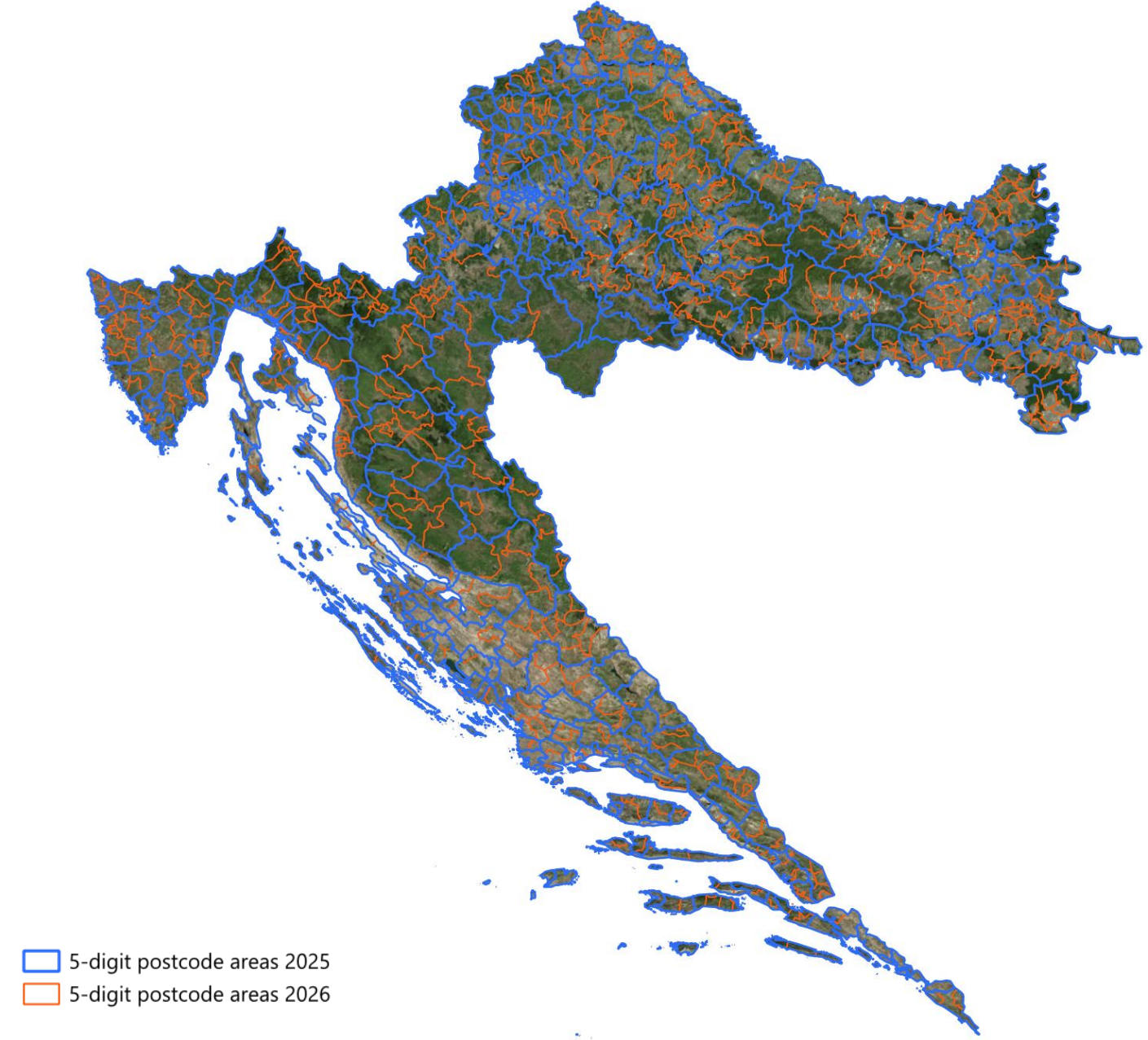
Croatia 2026

5-digit postcode areas



Sources: Esri, DigitalGlobe, GeoEye, i-cubed, USDA FSA, USGS, AEX, Getmapping, Aerogrid, IGN, IGP, swisstopo, and the GIS User Community

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United Kingdom

Highly detailed and precise

Avoid errors in planning and analyzing with precise and updated boundaries



Sources: Esri, DigitalGlobe, GeoEye, i-cubed, USDA FSA, USGS, AEX, Getmapping, Aerogrid, IGN, IGP, swisstopo, and the GIS User Community

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United Kingdom

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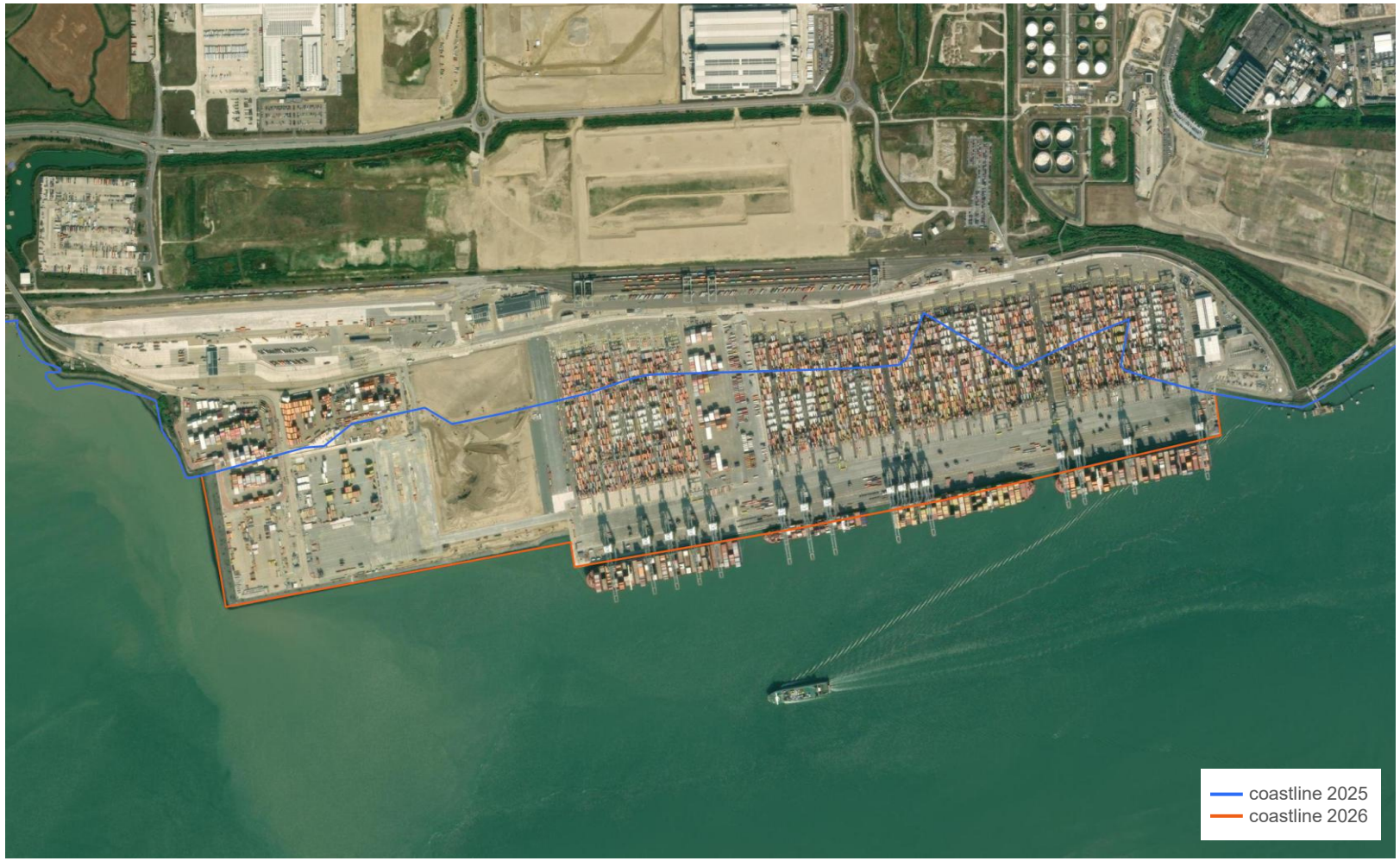

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NIQ Geomarketing

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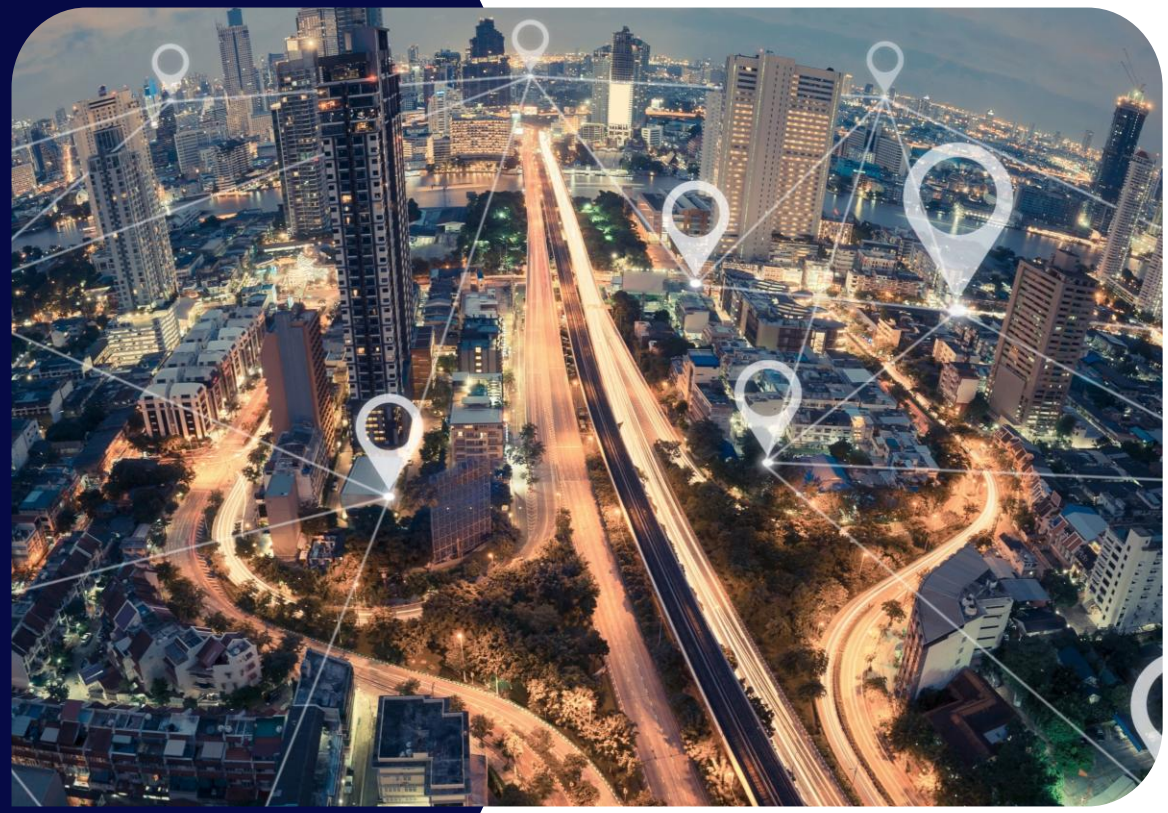
NIQ Purchasing Power Europe 2026

The study is available for 42 European countries at detailed regional levels such as municipalities and postcodes, along with seamlessly fitting data on inhabitants and households as well as digital maps.



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The baker’s dilemma

A baker wants to open a second shop. Same number of people, same rent. Two towns are on his list.



Town A

vs.



Town B

Which town does he choose?

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It depends.

On how much money people there can actually spend.



One thing is certain:
“They look hungry”
is not a method.

Reveal what is behind the towns →

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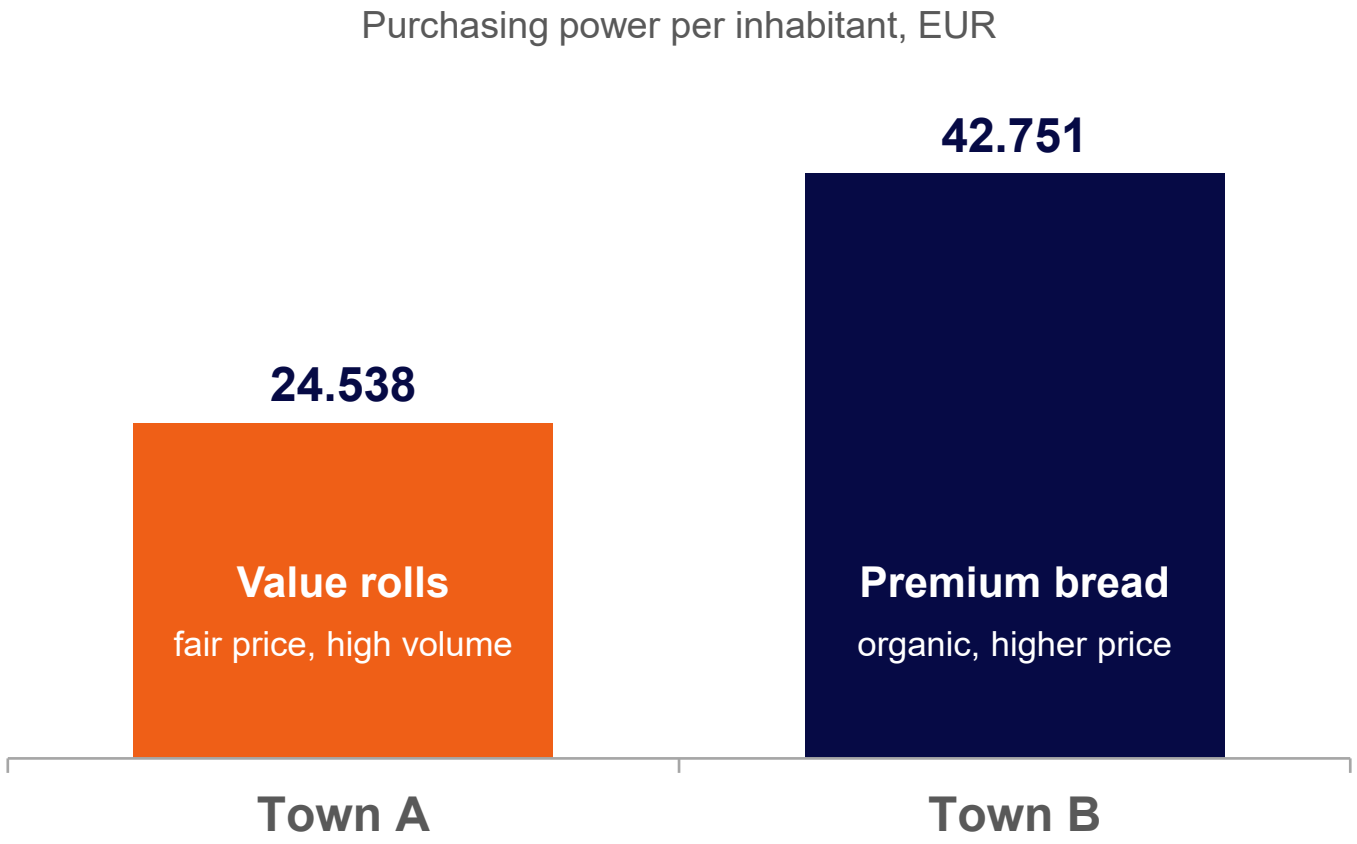
Same people. Same rent. Different budgets.

And so a different shop in each town.



1.7×

the spending budget per person in Town B

High purchasing power is not “good”. Low is not “bad”.

It tells the baker what to sell and what to charge.

Let's reveal the towns

Next: What is purchasing power? →

Thought experiment: equal population and rent assumed. Values: real German districts, NIQ Purchasing Power Europe 2026.

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Two real German districts

Purchasing power per inhabitant, NIQ Purchasing Power Europe 2026

Town A

Gelsenkirchen

24,538 EUR

Index 79

Shop: value rolls

Germany

31,193 EUR

Index 100

Town B

Starnberg

42,751 EUR

Index 137

Shop: premium bread

Same country, different budget, different shop.

← Back to the numbers

Next: What is purchasing power? →

1 Dilemma | 2 It depends | 3 Reveal | 4 Districts | 5 Definition | 6 Wrap-up

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What is purchasing power?

The budget people can spend in your shop. An indicator, not a judgment.

Gross income → **– Taxes and social security + Social benefits** → **= Net income of private households**

= Purchasing power

- ✗ **Not wealth**
- ✗ **Not the sports car in the garage**
- ✓ **Just the budget people can spend**

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Purchasing Power Europe 2026

42 countries. One average. A huge spread.

21,153 EUR

average purchasing power per person and year



Averages are polite liars.

How do we get these numbers? In two steps.

1

Total net income per country

All net income of private households, based on the latest data plus forecasts for the current year.

2

Spread it over the map

Official statistics and census data, measured where people live. A family suburb and a student quarter do not earn the same.

Sources: NIQ Purchasing Power Europe 2026, based on official statistics from Destatis, Eurostat and national statistical offices, plus census data. Ukraine is not part of the country comparison because of the war, but it is included in the European average.

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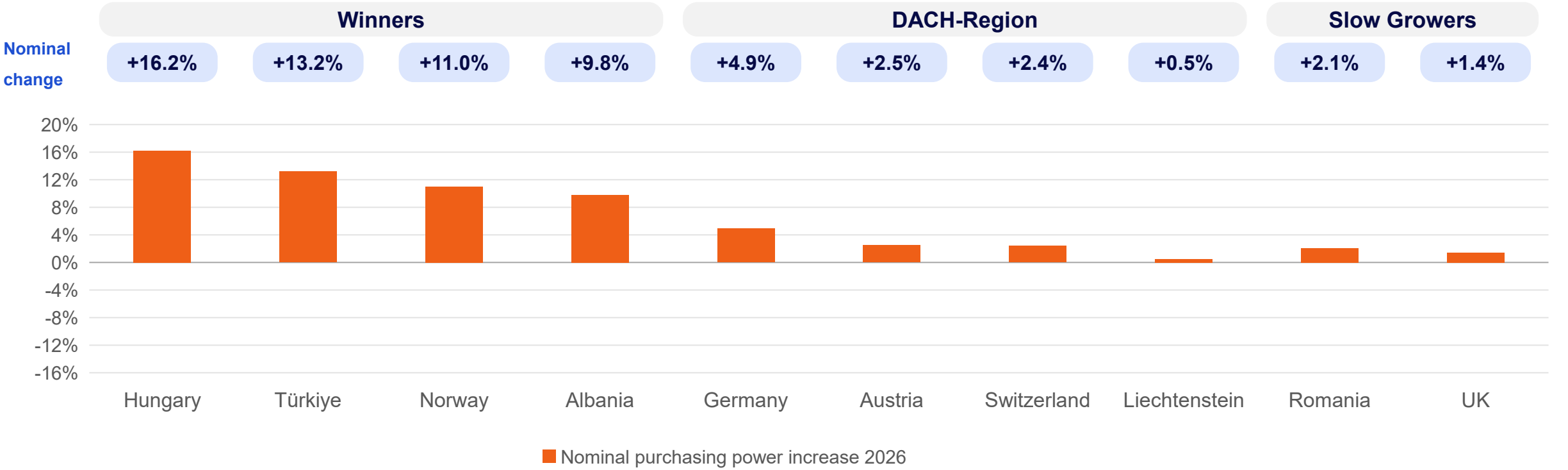
Purchasing Power Europe

Nominal purchasing power growth 2026, ranked



Hungary: +16.2%

Ahead of Türkiye (+13.2%) and Norway (+11.0%)

DACH: up to +4.9%

Germany leads, Liechtenstein trails

Germany vs. Austria

Austria's lead shrinks from EUR 960 to 260

Romania and UK

+2.1% and +1.4%, both below Germany (+4.9%)

Source: NIQ Purchasing Power Europe 2026
Purchasing power per capita in EUR, 2025 revised vs. 2026 (nominal change; exchange-rate effects are not isolated). Countries ranked by nominal change, DACH shown in the centre.

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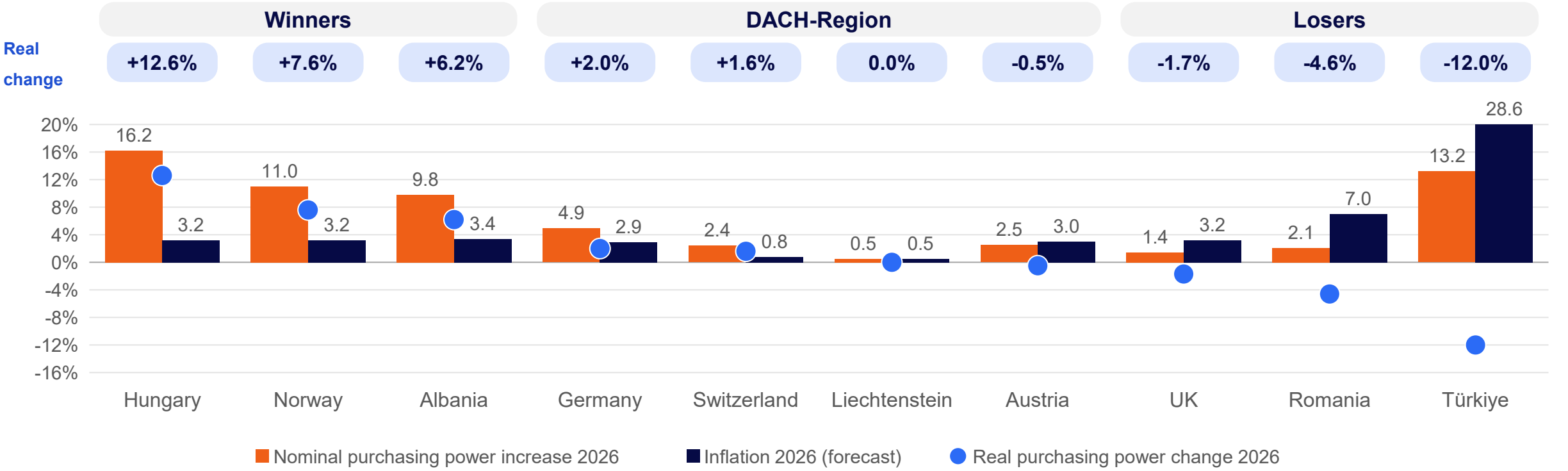
Purchasing Power Europe

Nominal growth, inflation and real change 2026



Hungary: +12.6% real

Tops the ranking, ahead of Norway (+7.6%)

DACH: two in the plus

Germany +2.0%, Switzerland +1.6%; Austria -0.5%

Germany vs. Austria

Real +2.0% vs. -0.5%, a gap of 2.5 points

Türkiye: #2 → #10

Real purchasing power falls by 12.0%

Source: NIQ Purchasing Power Europe 2026 | AMECO (May 2026), IMF
Purchasing power per capita in EUR, 2025 revised vs. 2026. Real change = (1 + nominal change) / (1 + inflation 2026) – 1; exchange-rate effects are not isolated. Inflation: AMECO forecast; IMF for Albania, Liechtenstein, Türkiye and UK. Türkiye inflation bar cut off at axis maximum. Ranks (#) refer to the ten countries shown, nominal vs. real.

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Back to our baker

Before he opens shop number two, he needs an answer to the following question:



How much can people spend?

Purchasing power

What to bake, what to charge

Otherwise, he ends up with a beautiful shop - in the wrong town.

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Purchasing Power Europe

Europe Purchasing Power per Capita by Postcode 2 Areas

€ 21,153
(+ 4.4 % PY)
Avg. Purchasing Power per Capita Europe (2026)

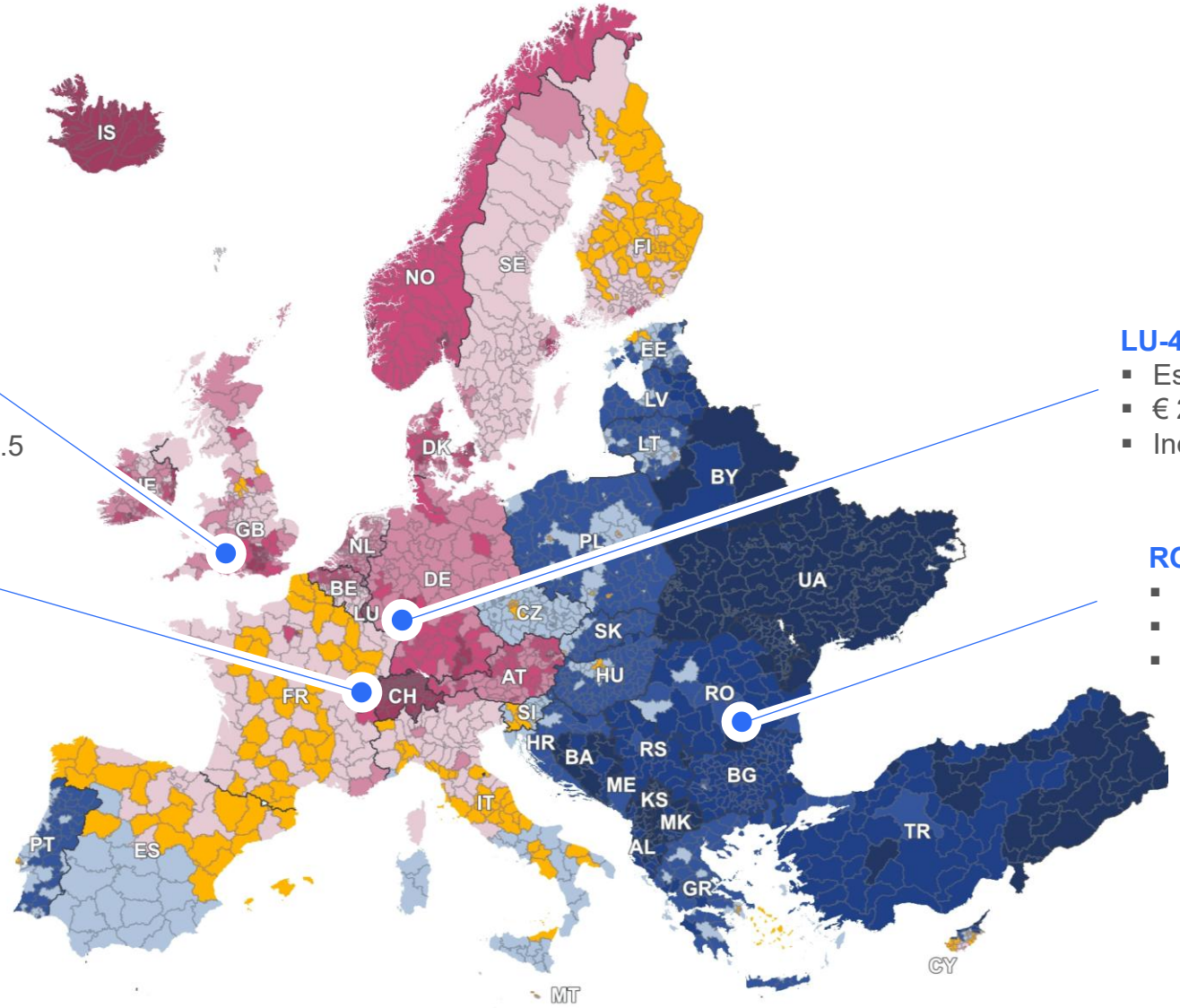
1 | CH-63
- Lake Lucerne
- € 85,610
- Index: 404.7

2 | GB-EC
- London
- € 77,517
- Index: 366.5

3 | CH-88
- Lake Zurich
- € 77,697
- Index: 367.3

LU-41
- Esch-sur-Alzette
- € 28,205
- Index: 133.3

RO-01
- Bucuresti
- € 29,928
- Index: 141.5



Purchasing Power per Capita by Postcode 2

low — avg. — high

no value available

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Purchasing Power Europe

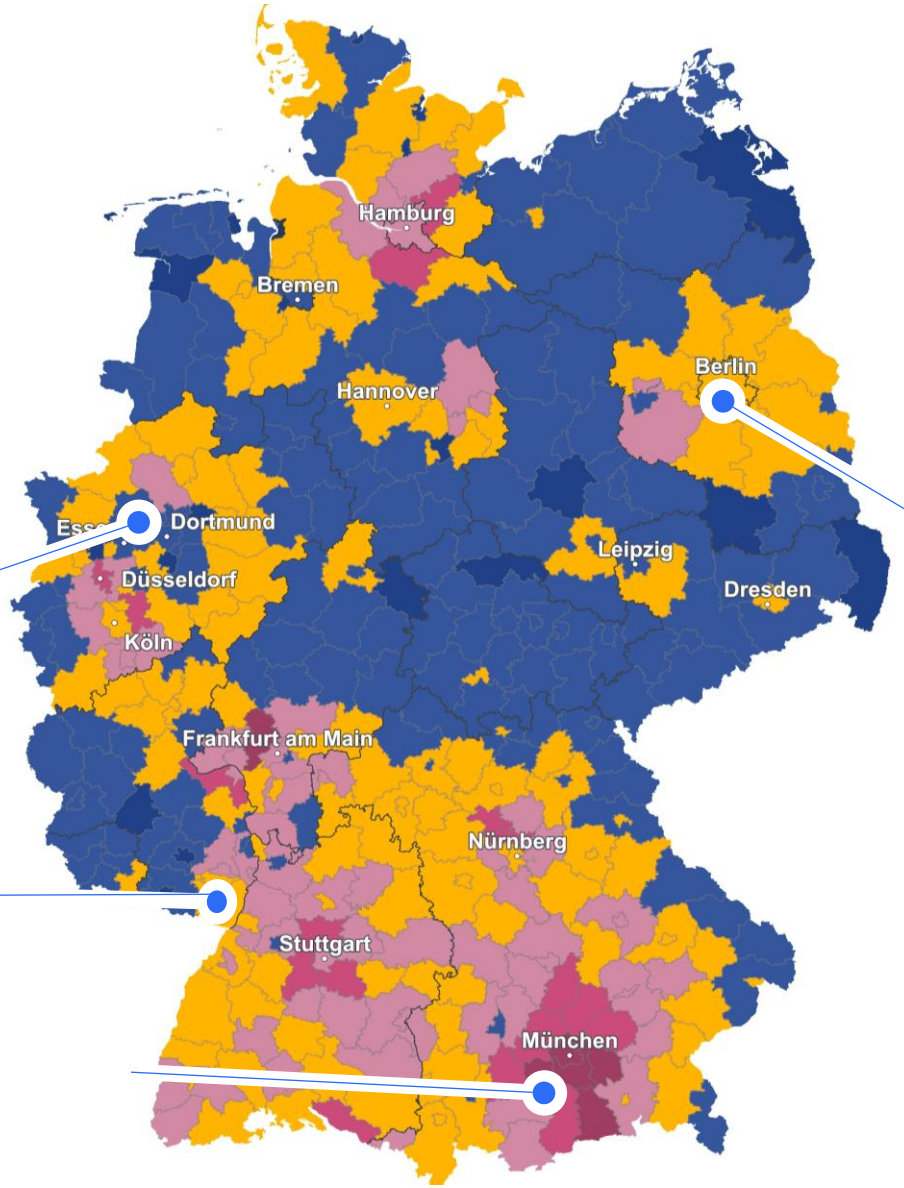
Germany – Purchasing Power per Capita by Districts

Markets differ from region to region. Each area has its own strengths and weaknesses that affect growth. Focusing your efforts where they matter most helps save resources and makes marketing more effective.

Purchasing power is a key measure of consumer potential. For example, it ranges from € 24,538 in Gelsenkirchen to € 42,751 in Starnberg.

The district of Landau represents almost exactly the German average in terms of purchasing power per capita

€ 31,193
(+ 4.9 % PY)
Avg. Purchasing Power per Capita Germany (2026)



GELSENKIRCHEN
- € 24,538
- Index: 78.7

LANDAU IN DER PFALZ
- € 31,207
- Index: 100.0

STARNBERG
- € 42,751
- Index: 137.1

BERLIN
- € 30,178
- Index: 96.7

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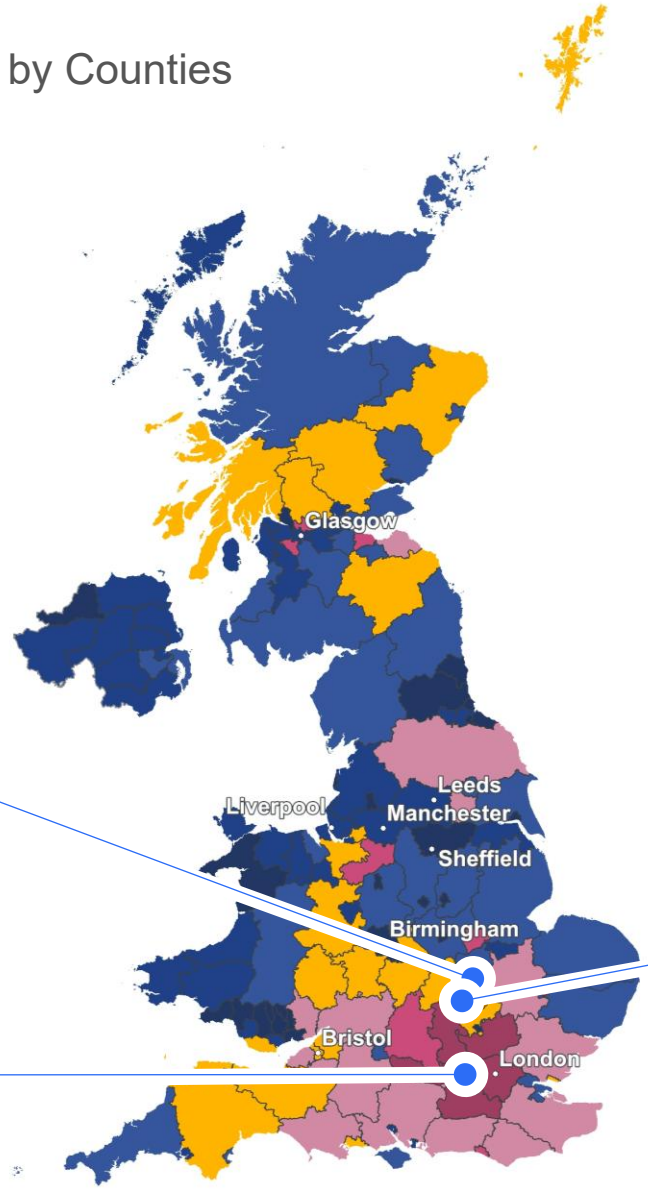
Purchasing Power Europe

United Kingdom – Purchasing Power per Capita by Counties

€ 29,921
(+ 1.4 % PY)
Avg. Purchasing Power per Capita
UK (2026)

LEICESTER
- € 19,449
- Index: 65.0

WINDSOR AND MAIDENHEAD
- € 44,224
- Index: 147.8



WEST NORTHAMPTONSHIRE
- € 29,675
- Index: 99.2

Purchasing Power per Capita by Counties
low avg. high

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NIQ Purchasing Power in action

Showcasing the capabilities of Purchasing Power data



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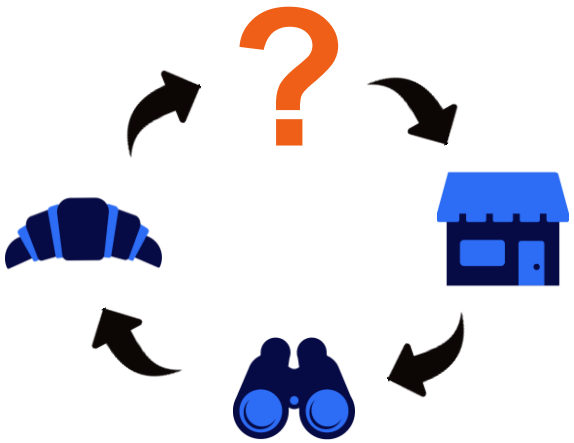
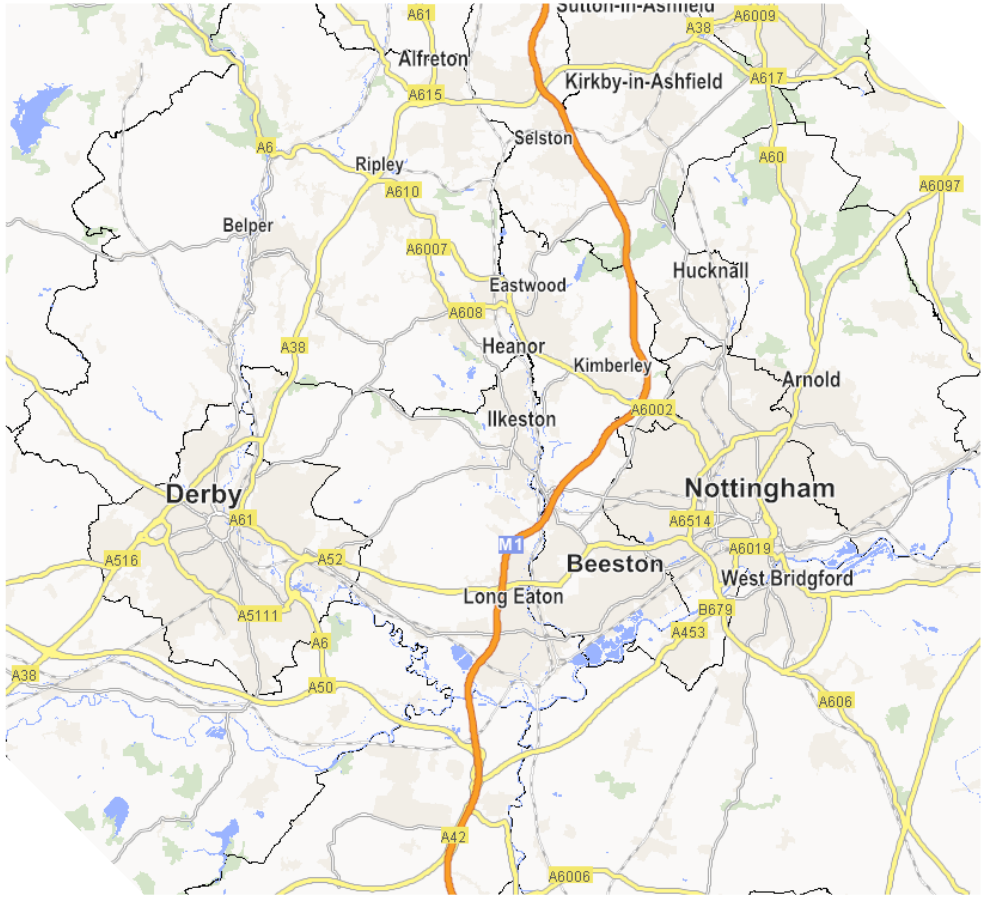
NIQ Purchasing Power data in action

Use case for site planning | decision making with high granularity data

Opening of a new bakery shop in Greater Nottingham





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NIQ Purchasing Power data in action

Use case for site planning | decision making with high granularity data

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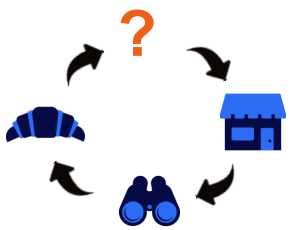
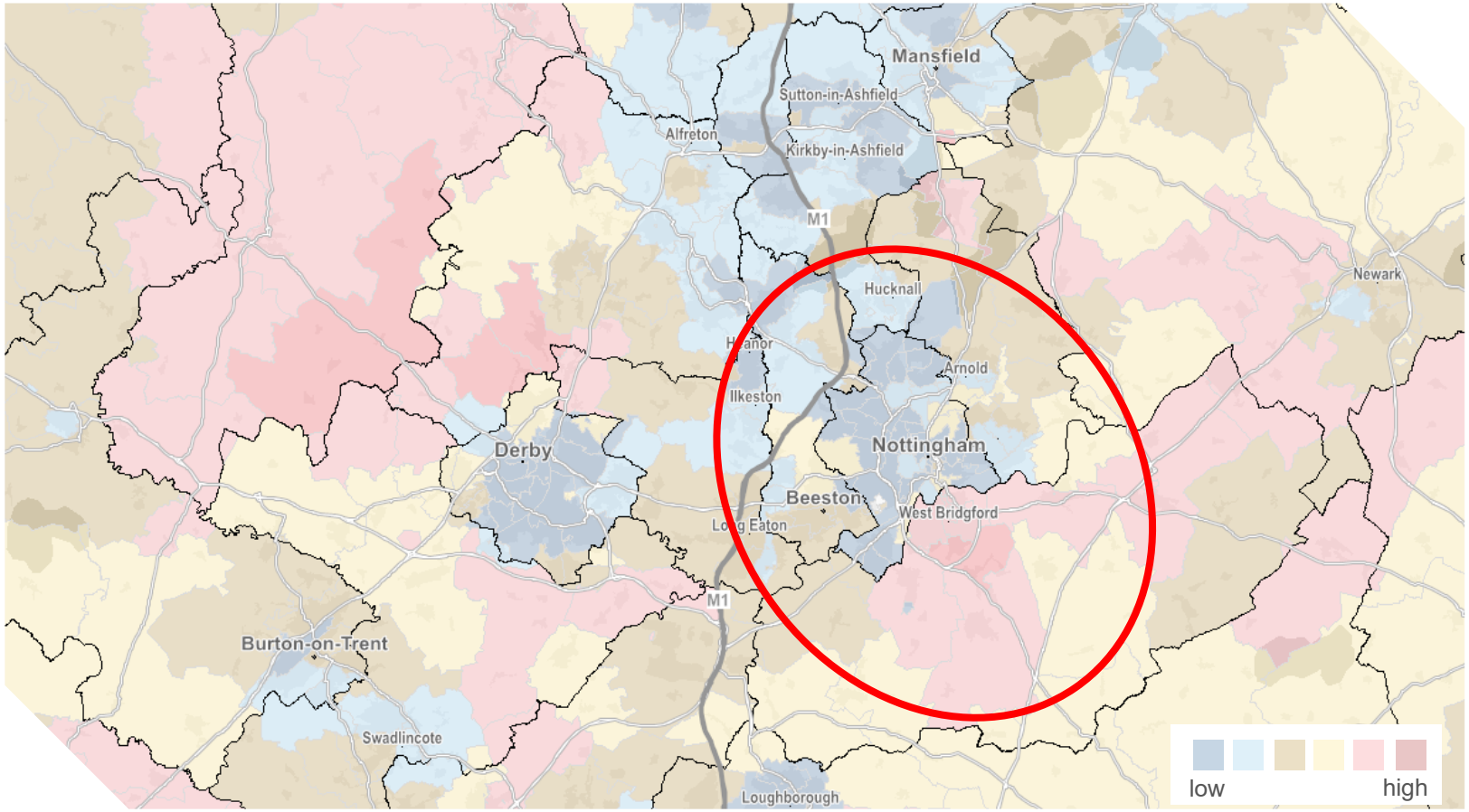
Opening of a new bakery shop in Greater Nottingham



Purchasing Power per capita at postcode sector



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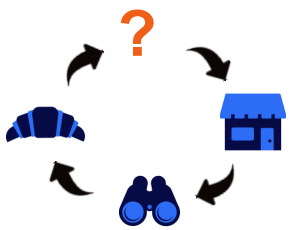
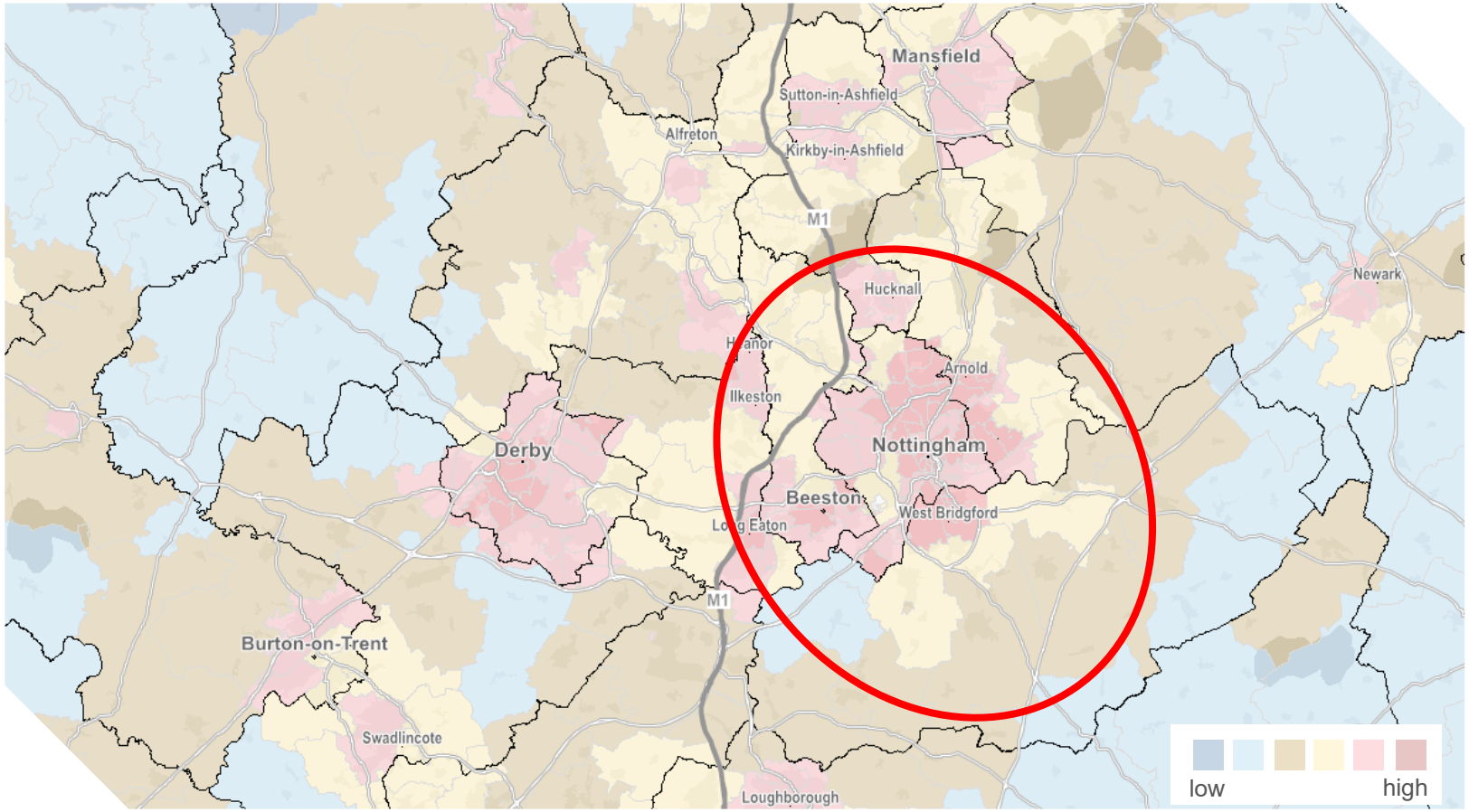


Purchasing Power per km² at postcode sector



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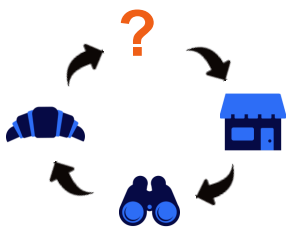
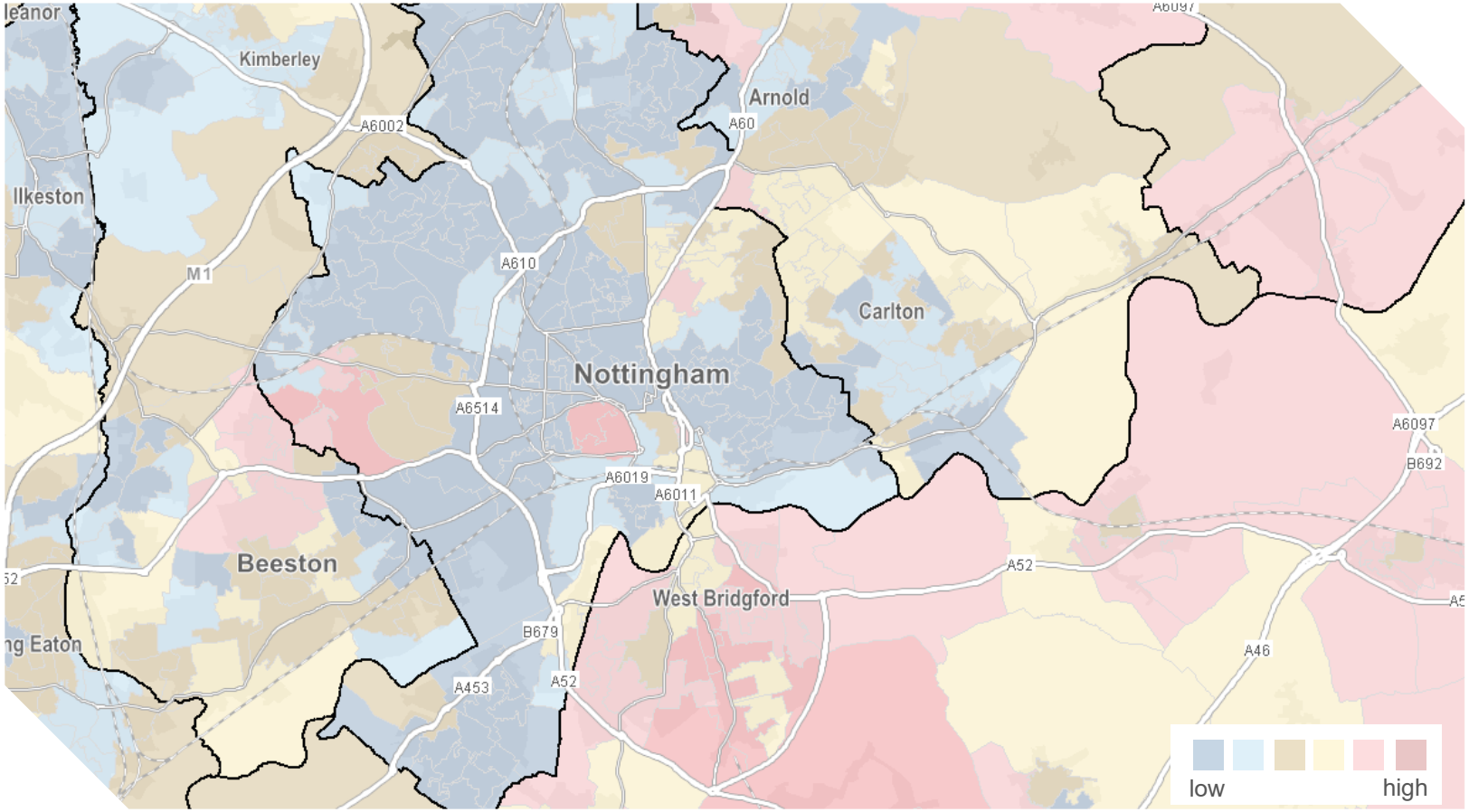


Purchasing Power per capita at super output area



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NIQ Purchasing Power data in action

Use case for site planning | decision making with high granularity data

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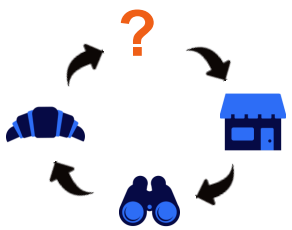
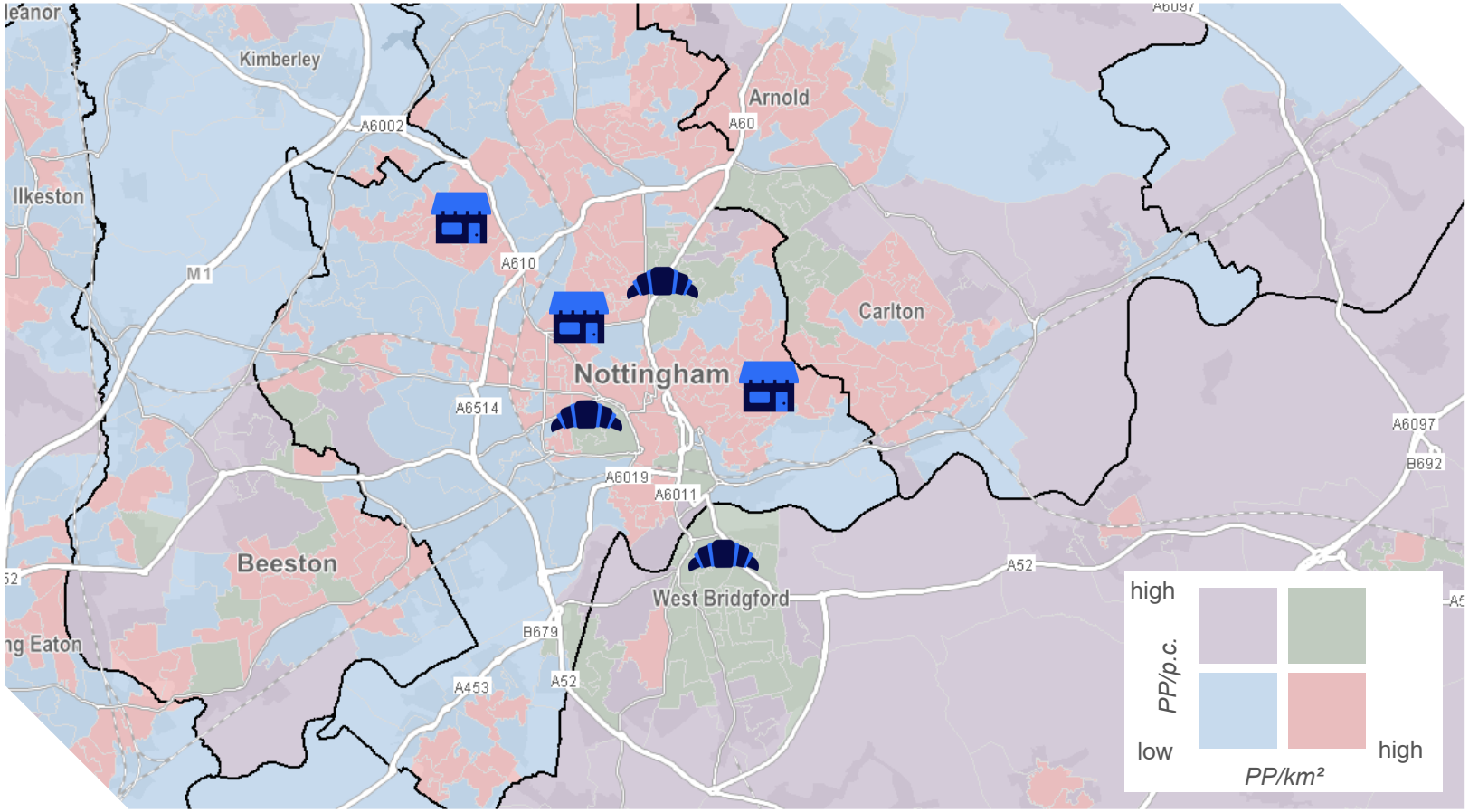
Opening of a new bakery shop in Greater Nottingham



Purchasing Power per capita vs Purchasing power per km² at super output area



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NIQ Purchasing Power data in action

Use case for site planning | decision making with high granularity data

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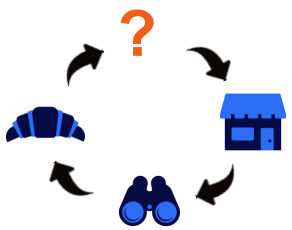
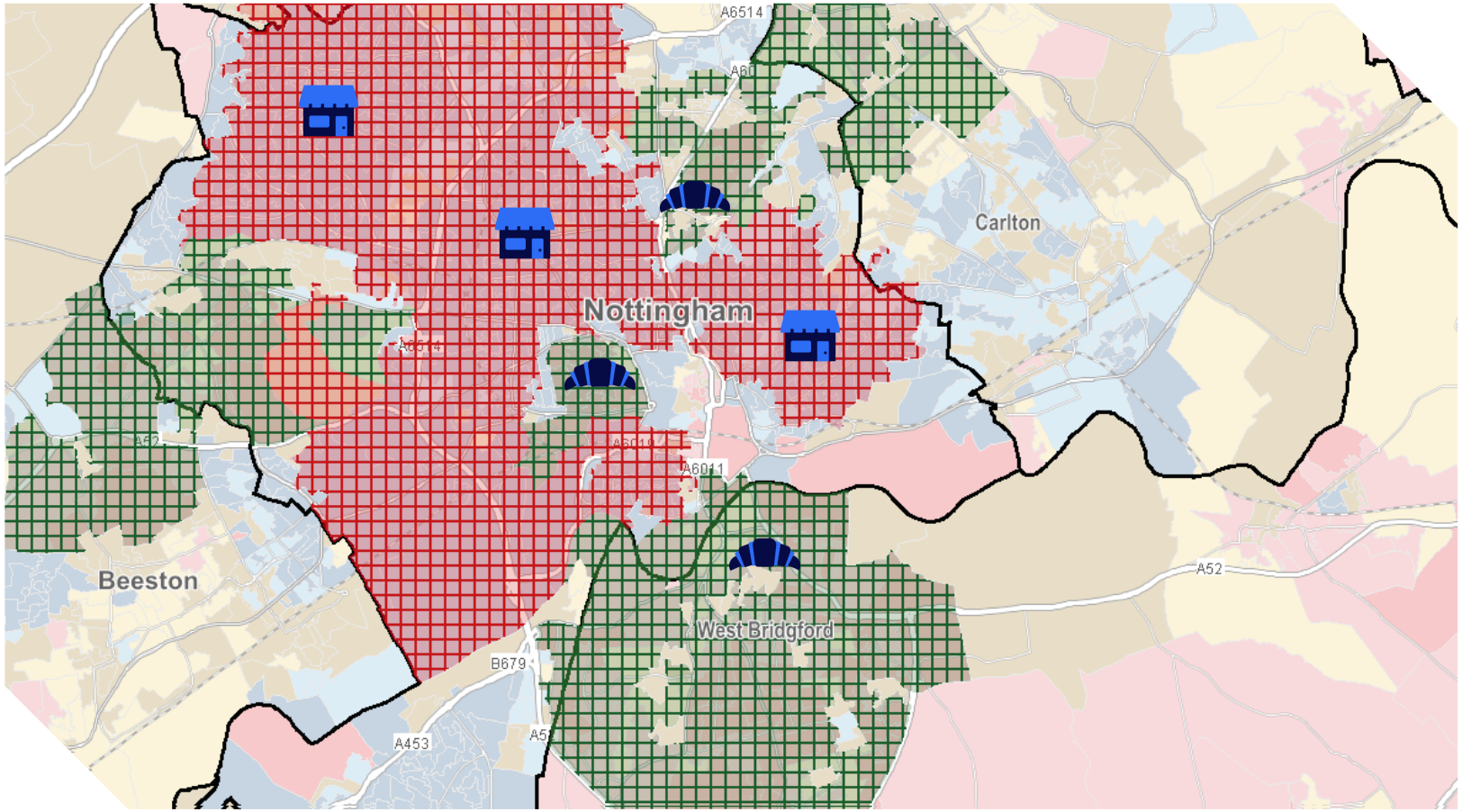


Purchasing Power per capita at output area



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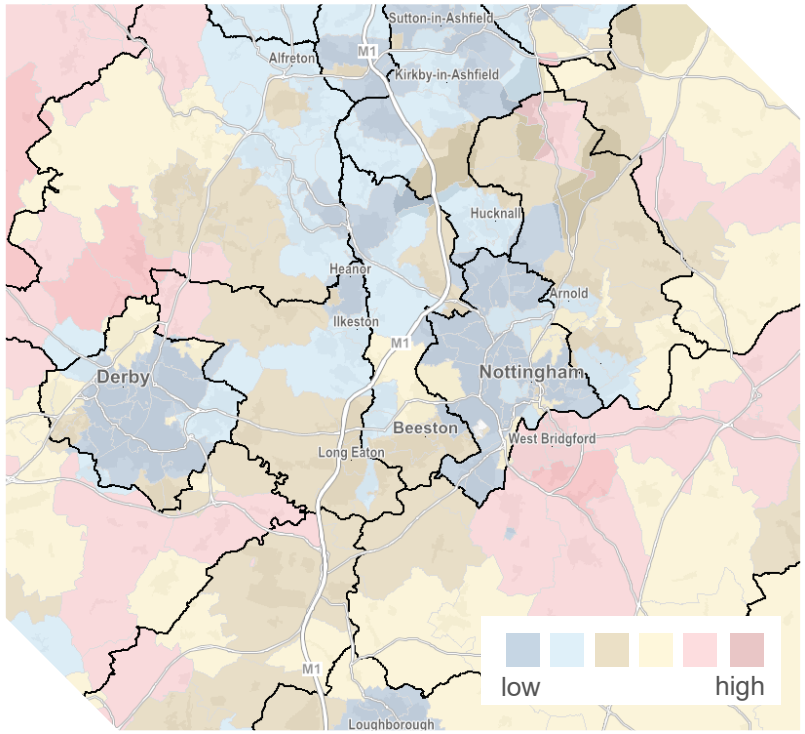
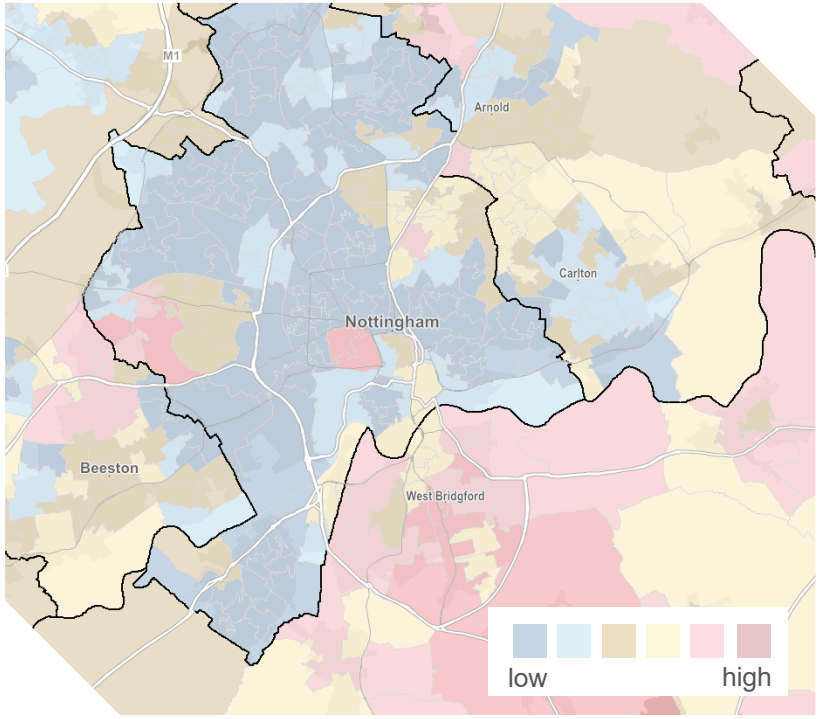
NIQ Purchasing Power data in action

Use case for site planning | decision making with high granularity data

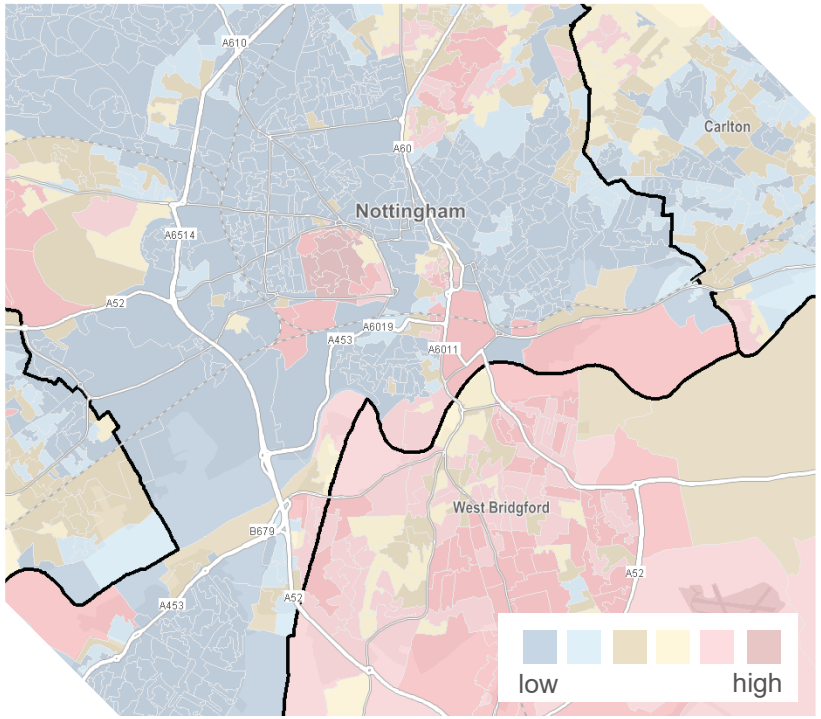
postcode sector



super output areas



output areas



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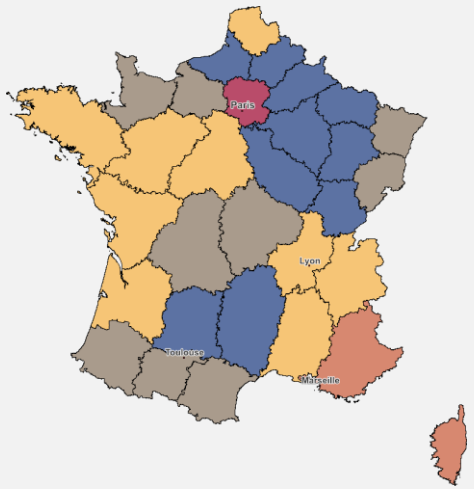
NIQ Purchasing Power data in action

Use case for territory planning | First attempt: equal purchasing power per territory

A first attempt cuts each territory to a similar purchasing power, so each starts with a similar revenue potential.

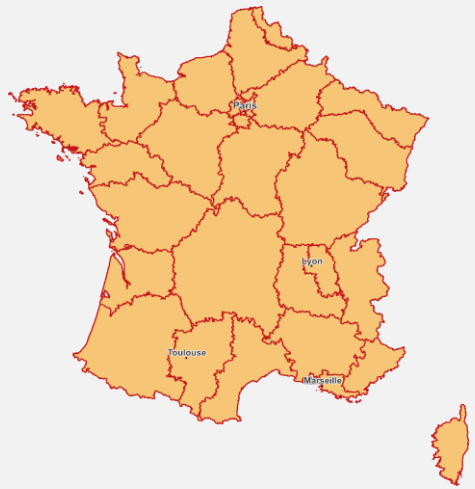
Grown over time

Reflects the past, not the market



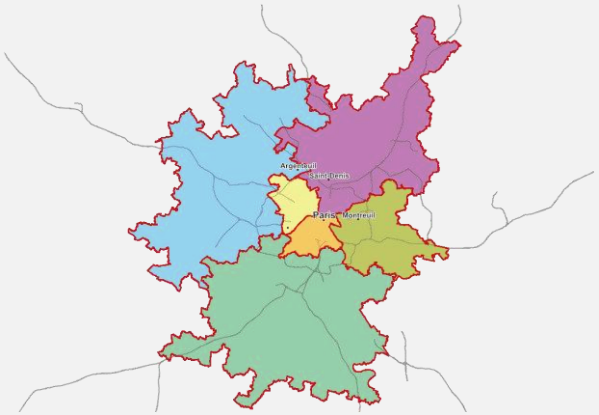
Equal in potential

Similar chances, very different sizes



Zoom into Paris

Many small territories in the city



Purchasing power gives a first, data-based split.

Drive times and existing customers still have to be factored in.

Illustrative example: nationwide sales territories of a frozen convenience food provider, France.

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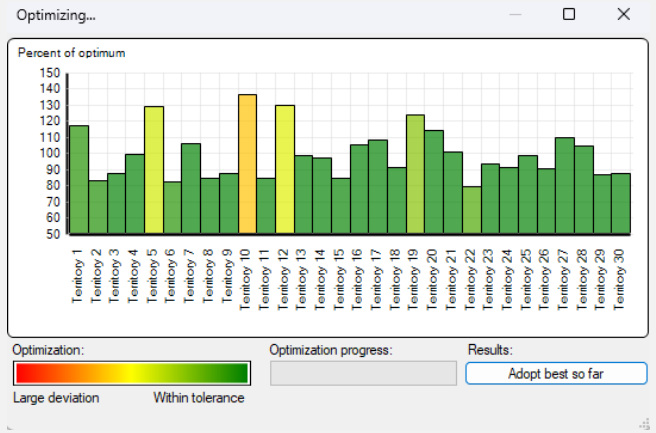
Fair is not equal size. Fair is equal opportunity per working hour

NIQ Purchasing Power data in action | Use case for territory planning

Equal purchasing power per territory is a good start, but not automatically fair.

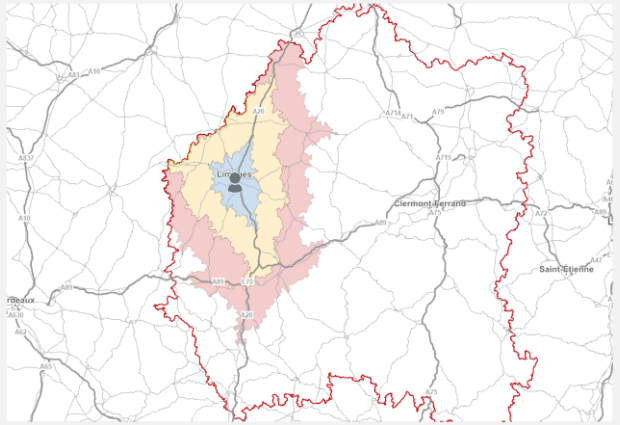
1 Balance potential

Similar purchasing power per territory, within a tolerance band



2 Cap the driving

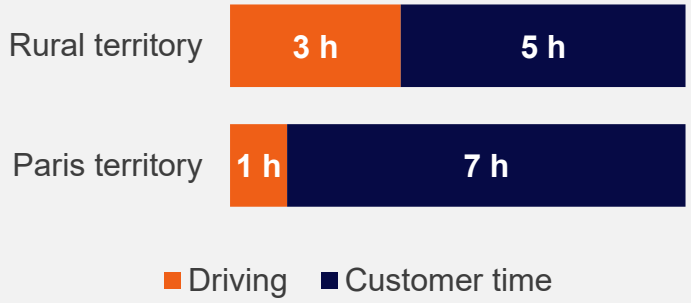
A maximum drive time keeps the workday realistic



3 Compensate the rest

Rural areas get lower targets to offset the longer drives

Example: one 8-hour working day



Purchasing power is the starting point, not the finish line.

A pilot territory shows you the rest.

Graphic (point 1) and map (point 2) from RegioGraph.

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Same baker. Same rent.
Now with a method.

Where to open, what to bake, what to charge.

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Do you have any questions?



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