



# GfK Market-i

An Insight into January 2013 UK Retail Durable Sectors

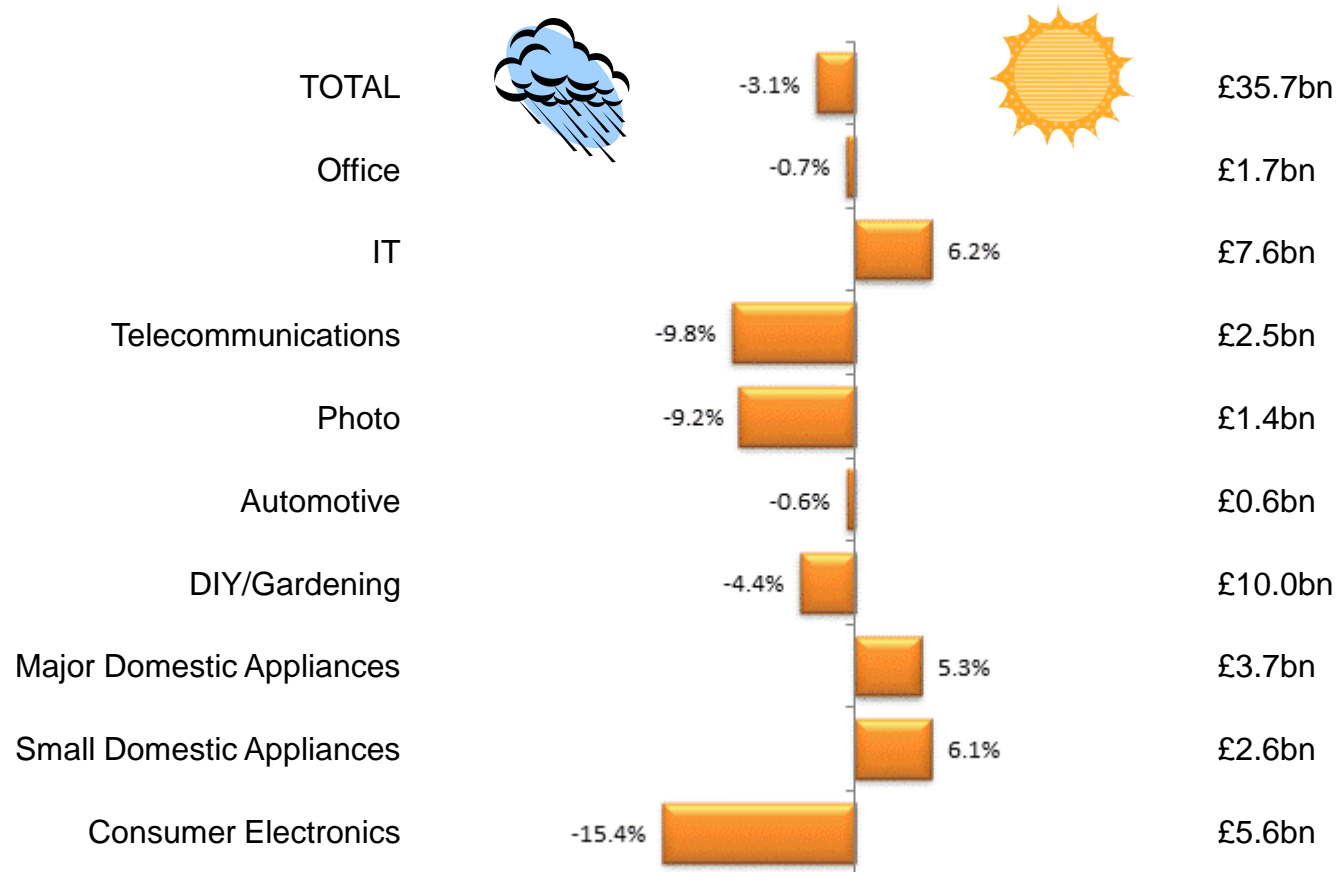
[www.gfk.com/uk](http://www.gfk.com/uk)

- January 2013 retail sales brought mixed results for the durables sectors with the total market declining 2.5% in January 2013 compared to the same month last year.
- In the technology areas, the IT sector experienced a growth of 4.9% month on month thanks to continuing strong sales of media tablets, whilst the consumer electronics sector declined 13.5%.
- The photo sector was hit the hardest in January, declining 20.7% month on month. The loss of a major retailer shows how much this sector is suffering – not helped by the fact that the key product category (digital cameras) remains under fierce cannibalisation from today's mobile and smart phones.
- Internet sales remained positive overall, up 13.5% on January last year as consumers browsed online to pick up early 2013 deals.

# Which Sectors Have Driven the Market Year on Year?

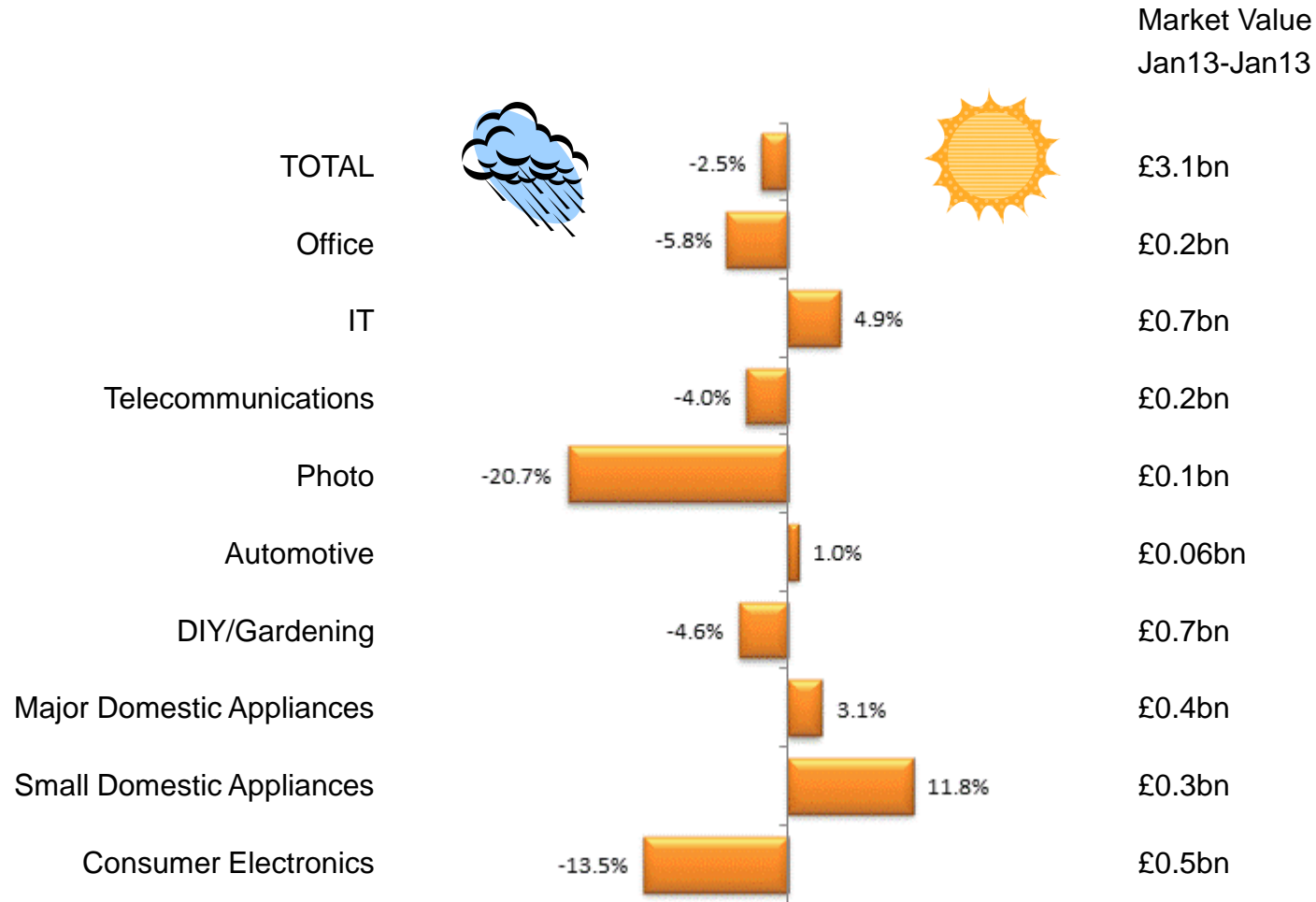
Year on Year % Growth in Value  
(the latest moving annual total versus the previous moving annual total)

Market Value  
Feb12-Jan13



# Which Sectors Have Driven the Market Year to Date?

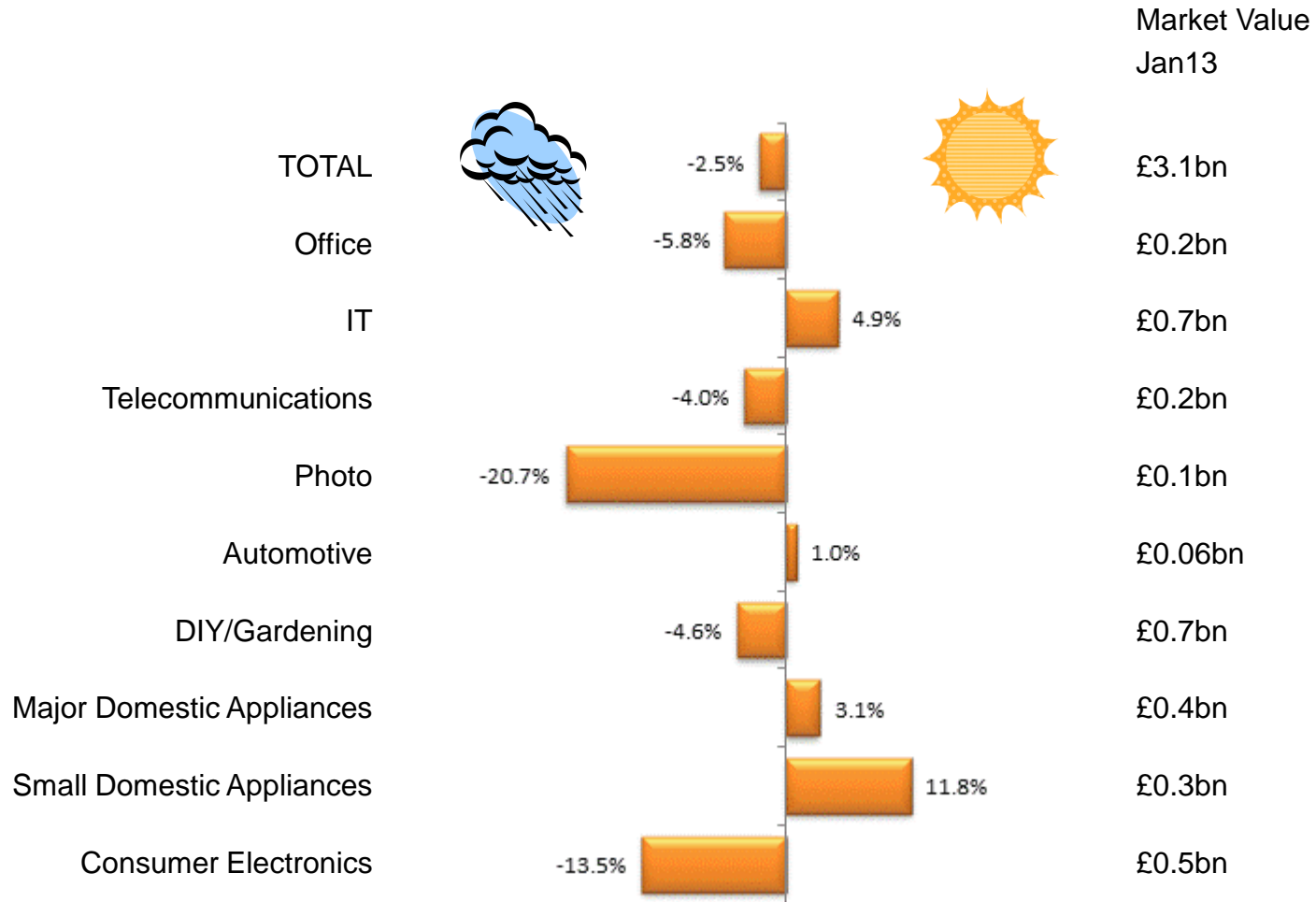
Year to Date % Growth in Value  
(value so far this year versus the same period last year)



# Which Sectors Have Driven the Market Month on Month?



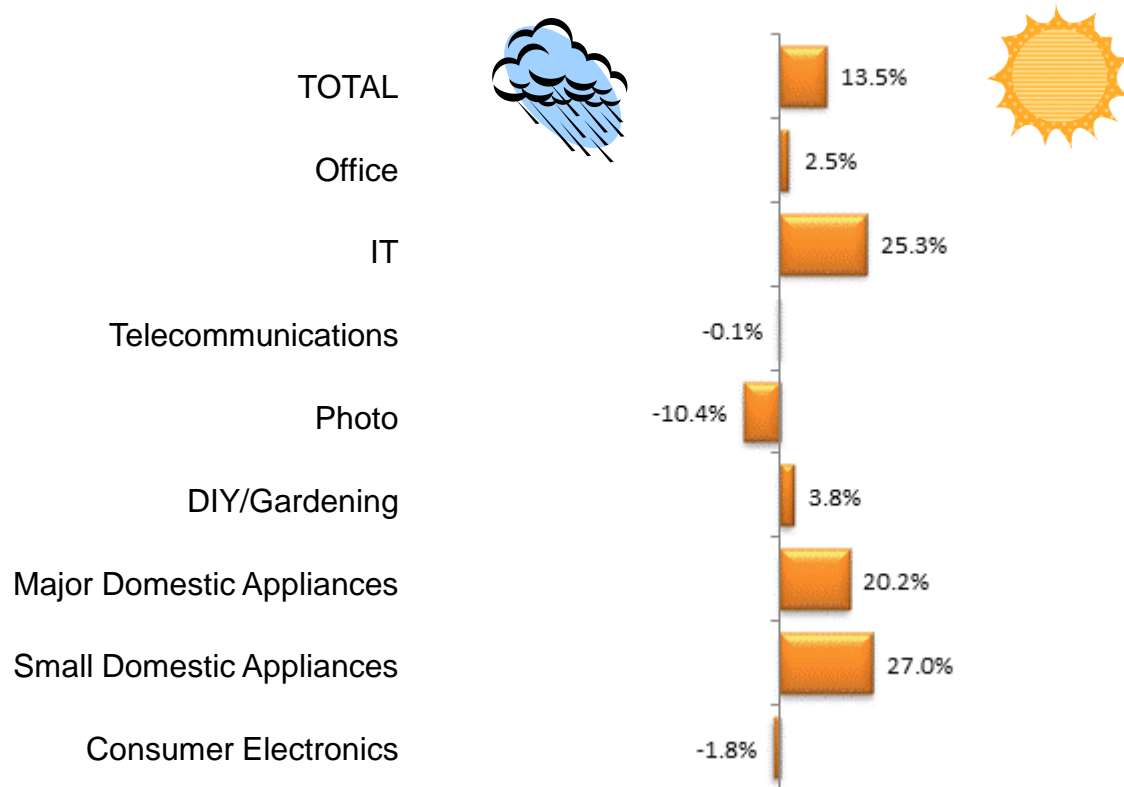
Month on Month % Growth in Value  
(this month versus the same month last year)



# How are Online Sales Performing Month on Month?

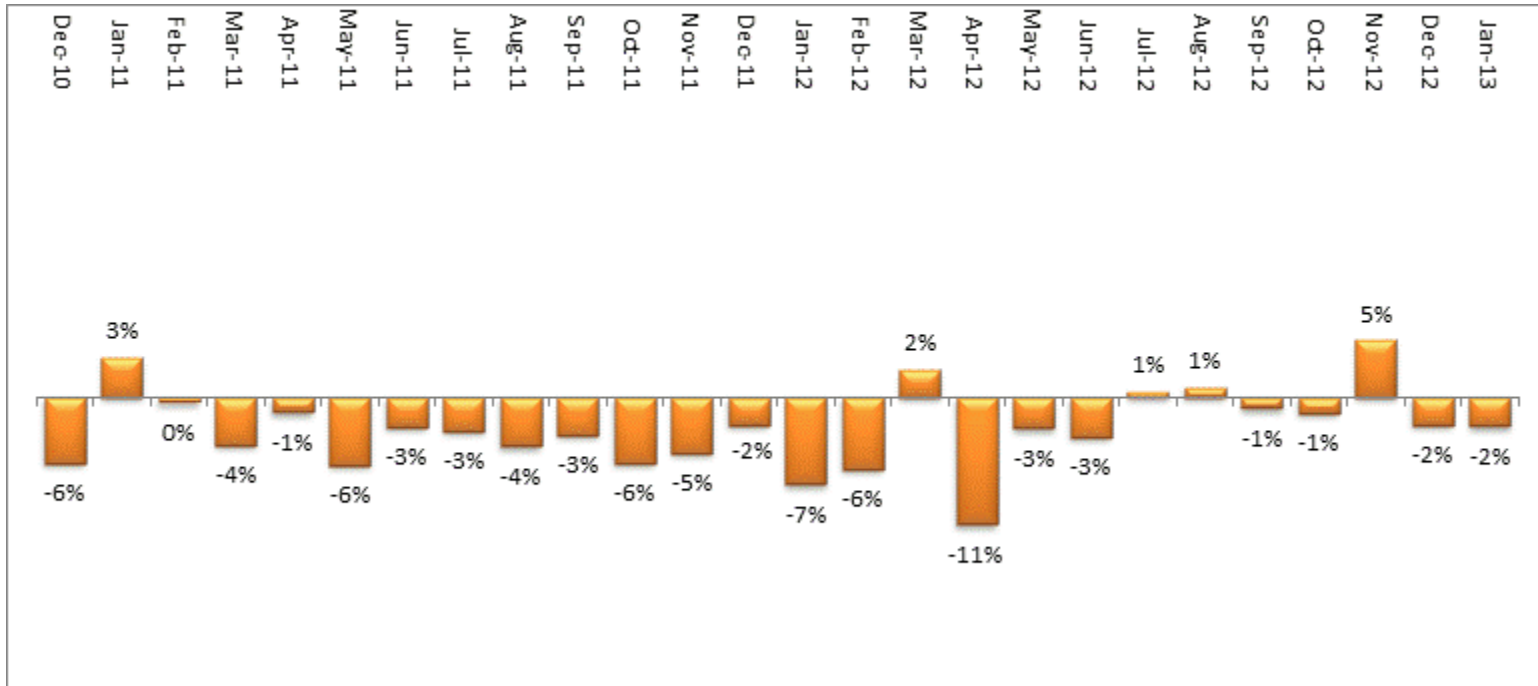


Month on Month % Growth in Online Sales  
(this month versus the same month last year)



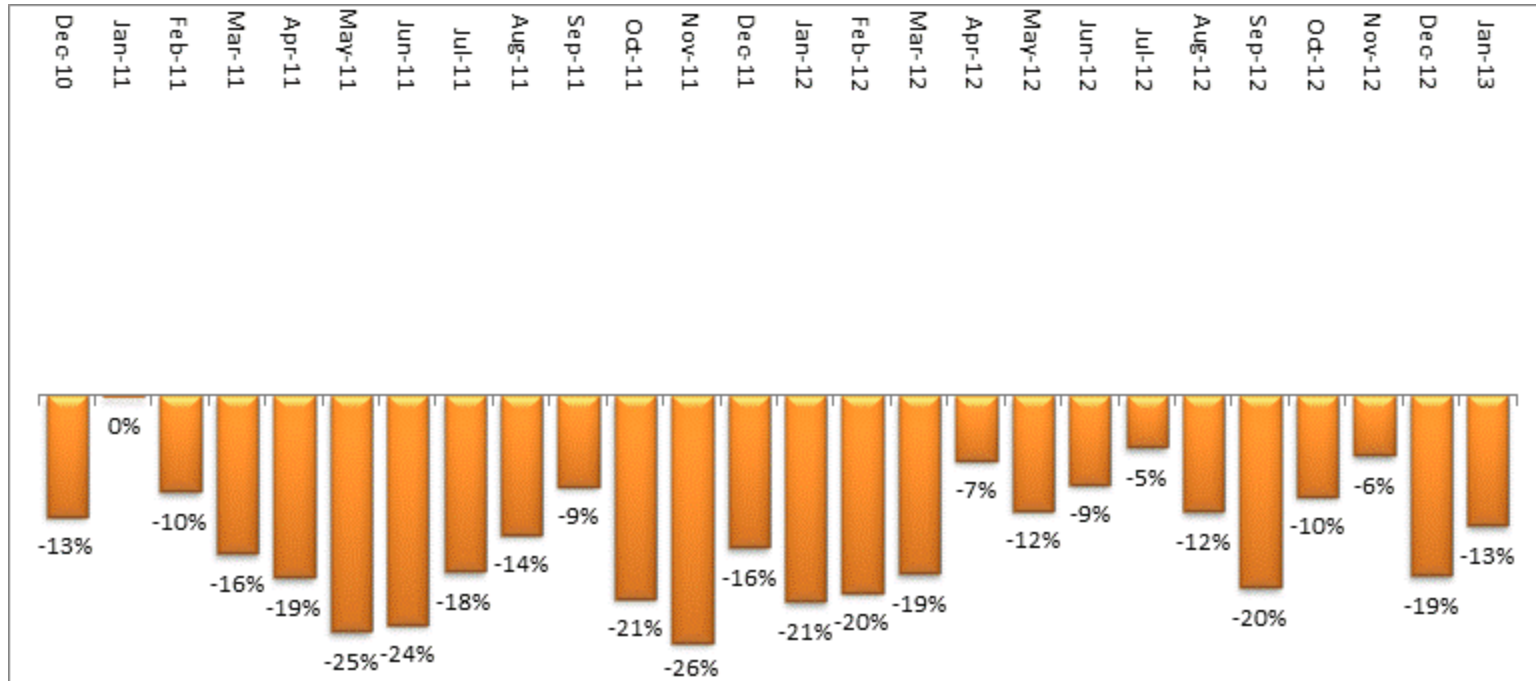
# How Has the Total Durables Market Performed?

Month on Month % Growth in Total Market Value  
(this month versus the same month last year)



# How Has the Consumer Electronics Sector Performed?

Month on Month % Growth in Sector Value  
(this month versus the same month last year)

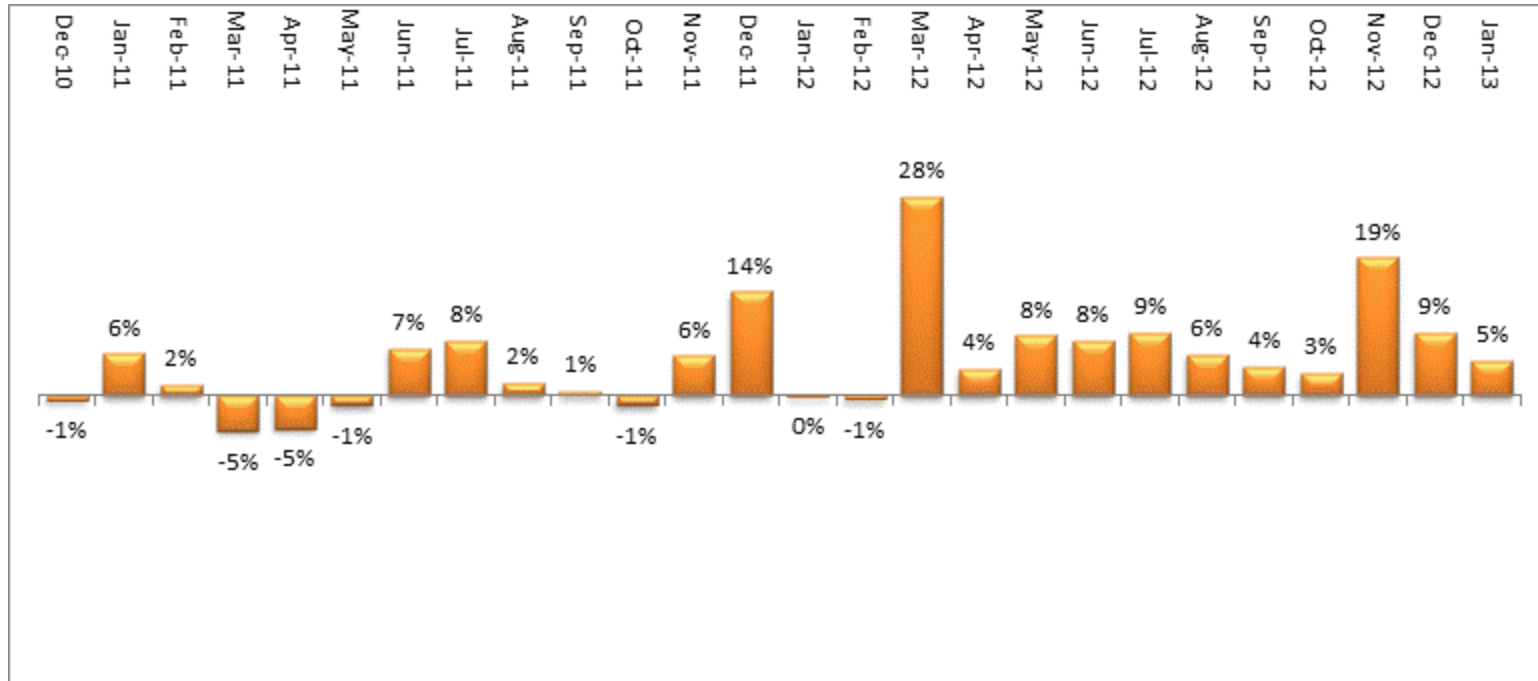


January shows a slight lessening of the decline, however January 2012 is a weak comparison point. There are few areas of growth in the audio video product categories – these tend to be subsets of bigger declining categories such as jumbo televisions, connected audio, digital portable radios and headphones with microphones.



# How Has the IT Sector Performed?

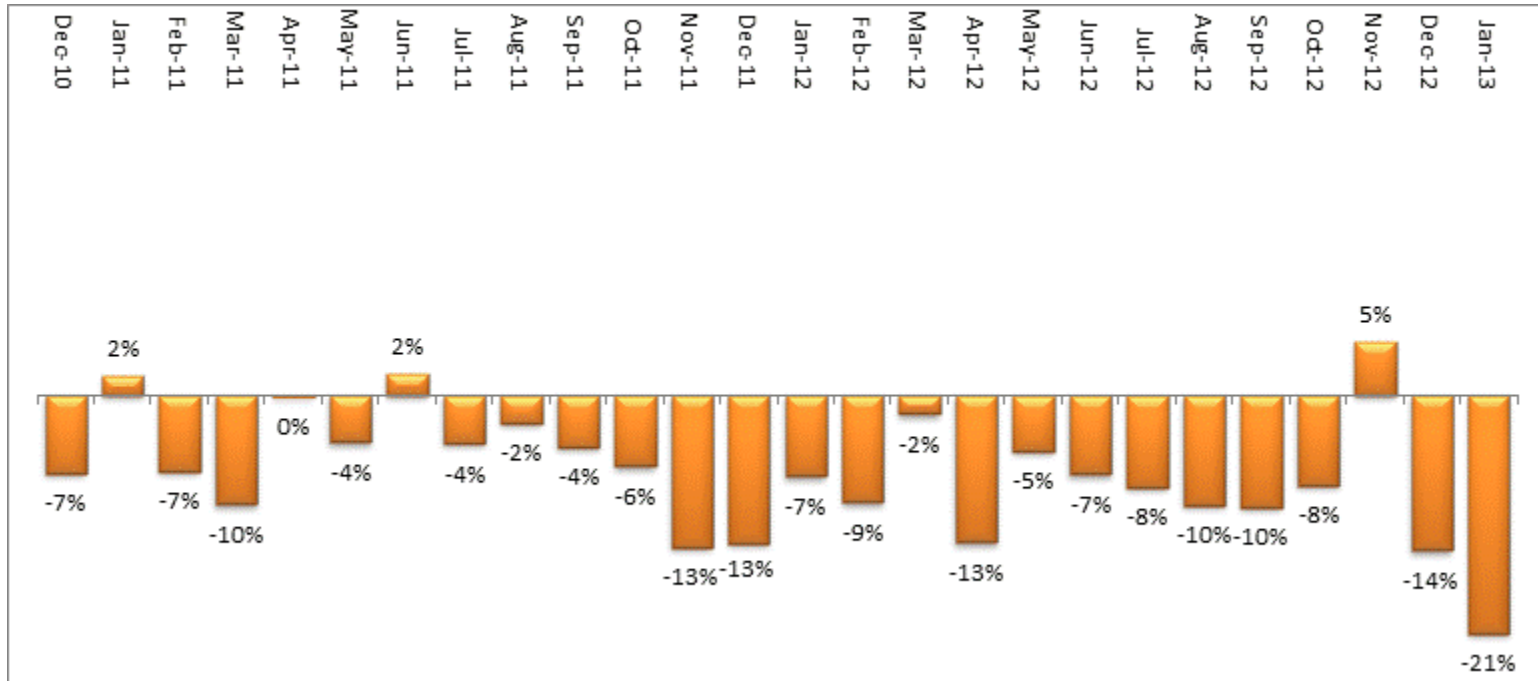
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



After a spike in December, media tablets continued to perform well, with the value attributable in January 2013 more than doubling on the same month last year.

# How Has the Photo Sector Performed?

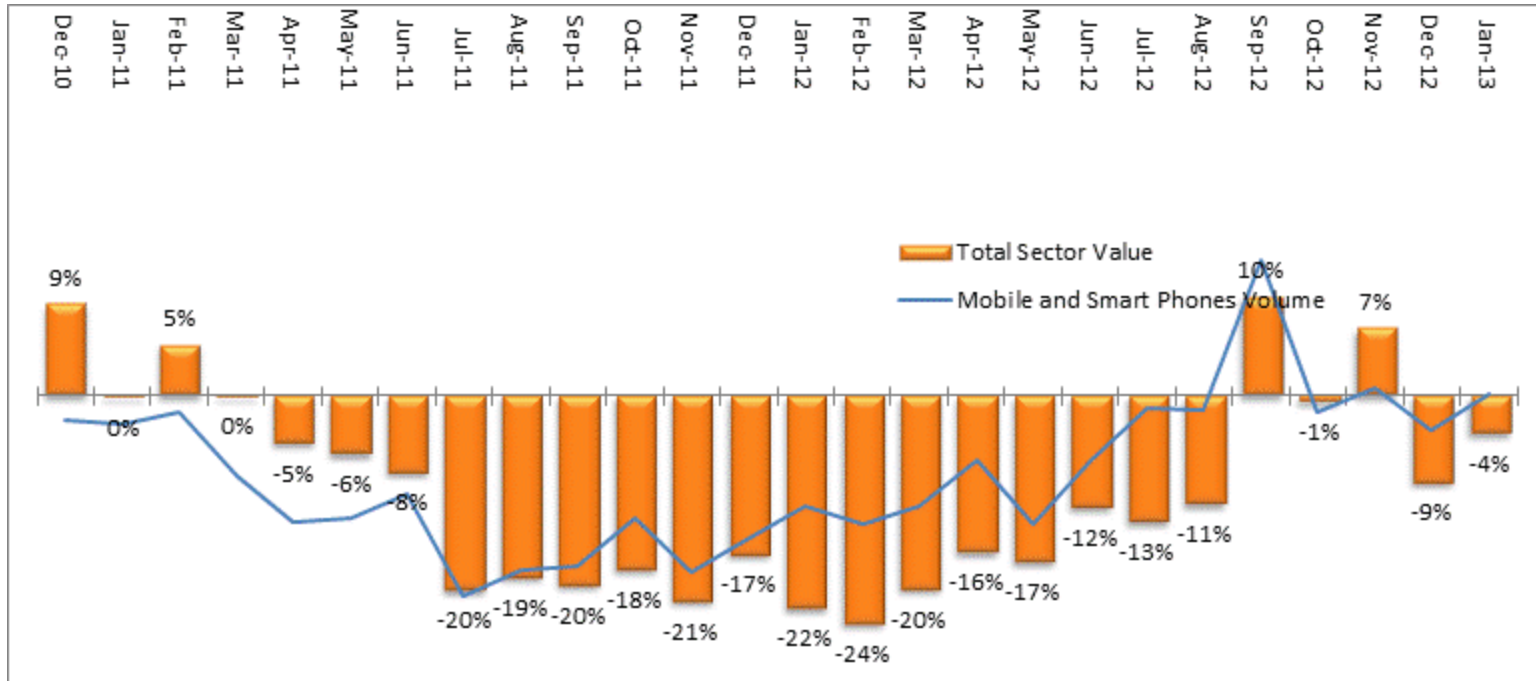
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



January saw sales of digital cameras slump. This was largely driven by the basic “point and shoot” segment declining 46% in volume compared to January last year. This area is under continued competition from cameras built into smart phones.

# How Has the Telecommunications Sector Performed?

Month on Month % Growth in Sector Value  
(this month versus the same month last year)

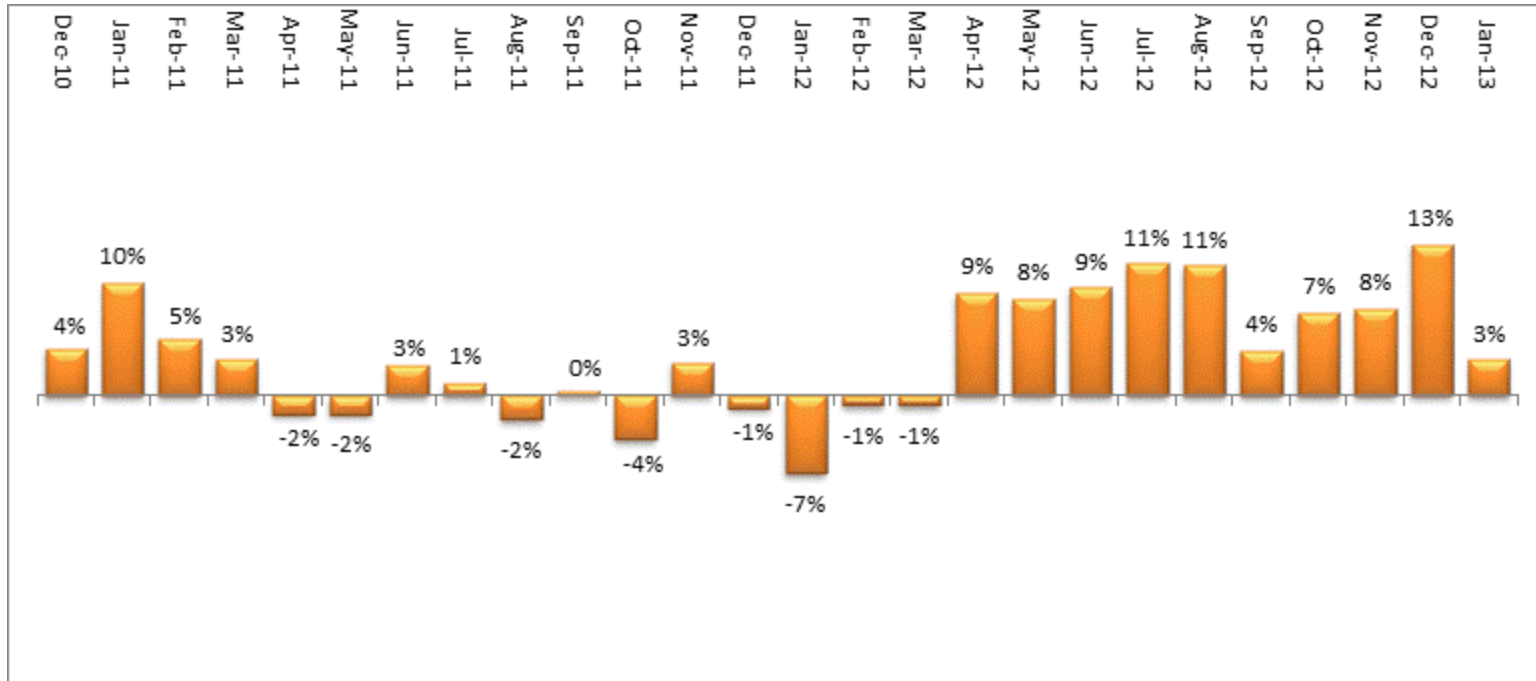


In January 2013, over 30% of all volume sales in the UK prepay market were smart phones. This is the lowest share since September 2012, where volume sales sat at just below 40%.

# How Has the Major Domestic Appliances Sector Performed?



Month on Month % Growth in Sector Value  
(this month versus the same month last year)

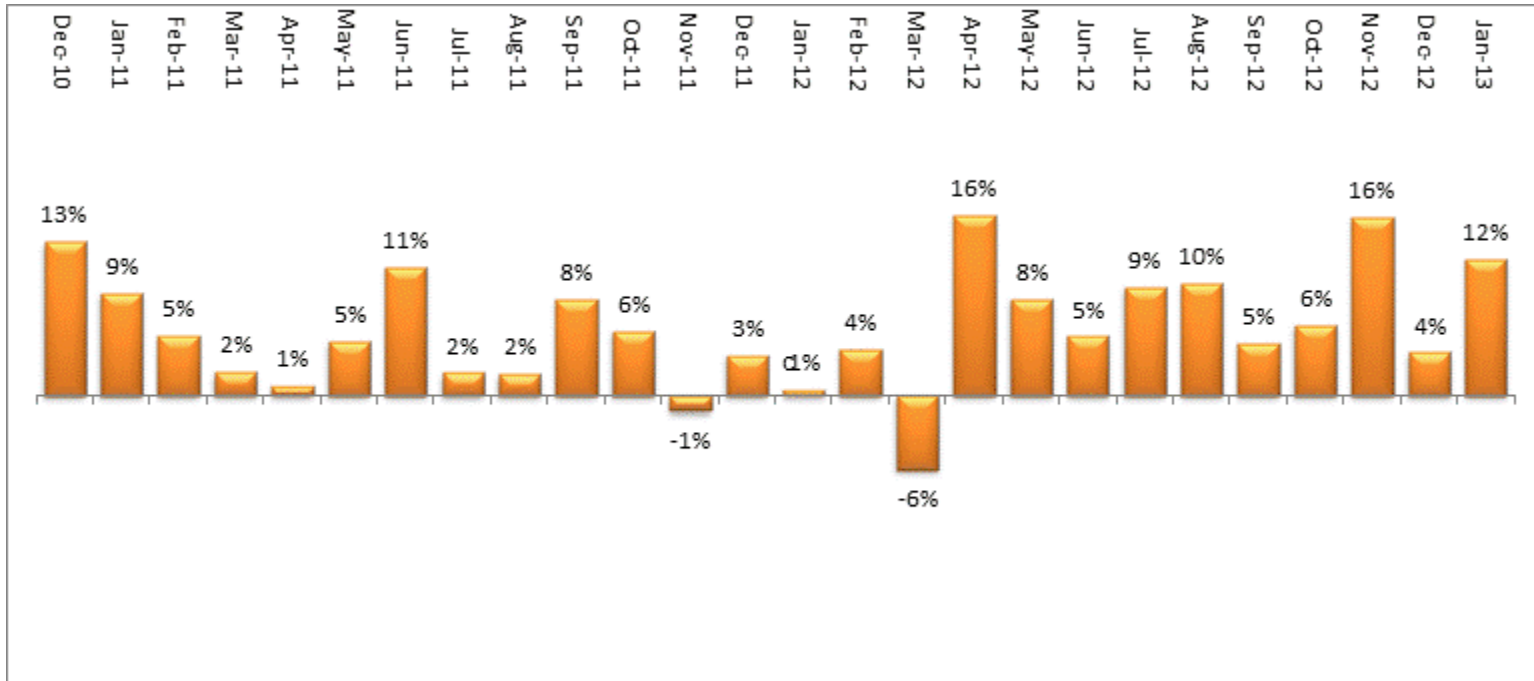


Most value growth came from the cooking product category which grew 4% compared to the same month last year. There was modest growth from cooling and dishwashers, both of which grew 1% month on month.

# How Has the Small Domestic Appliances Sector Performed?



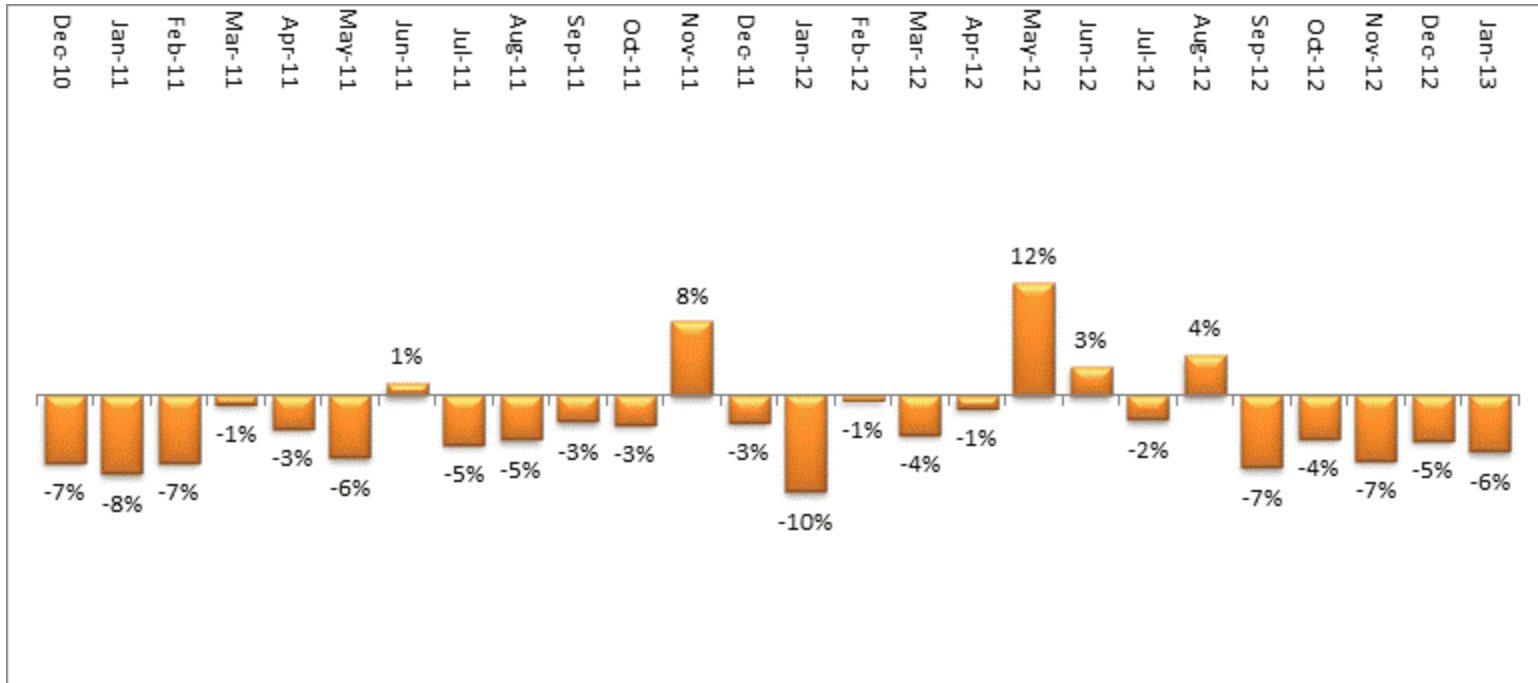
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



January 2013 saw consumers splash out on vacuum cleaners – value grew 11% compared to the same month last year. In the kitchen, deep fryers grew 19% month on month whilst hot beverage makers grew 9%.

# How Has the Office Sector Performed?

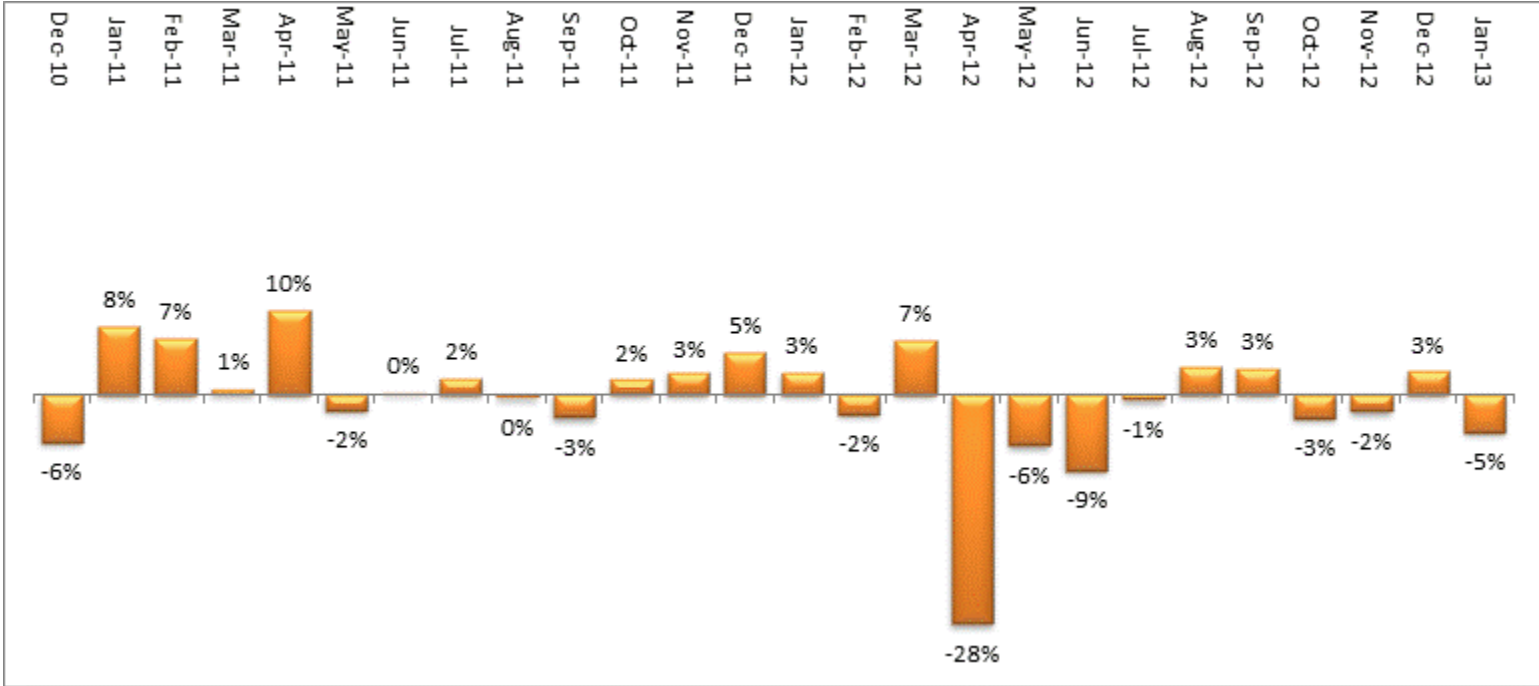
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



The continued decline of printer consumables results, once again, in an overall decline for the sector in spite of good growth for ballpoint pens and office adhesives.

# How Has the DIY/Gardening Sector Performed?

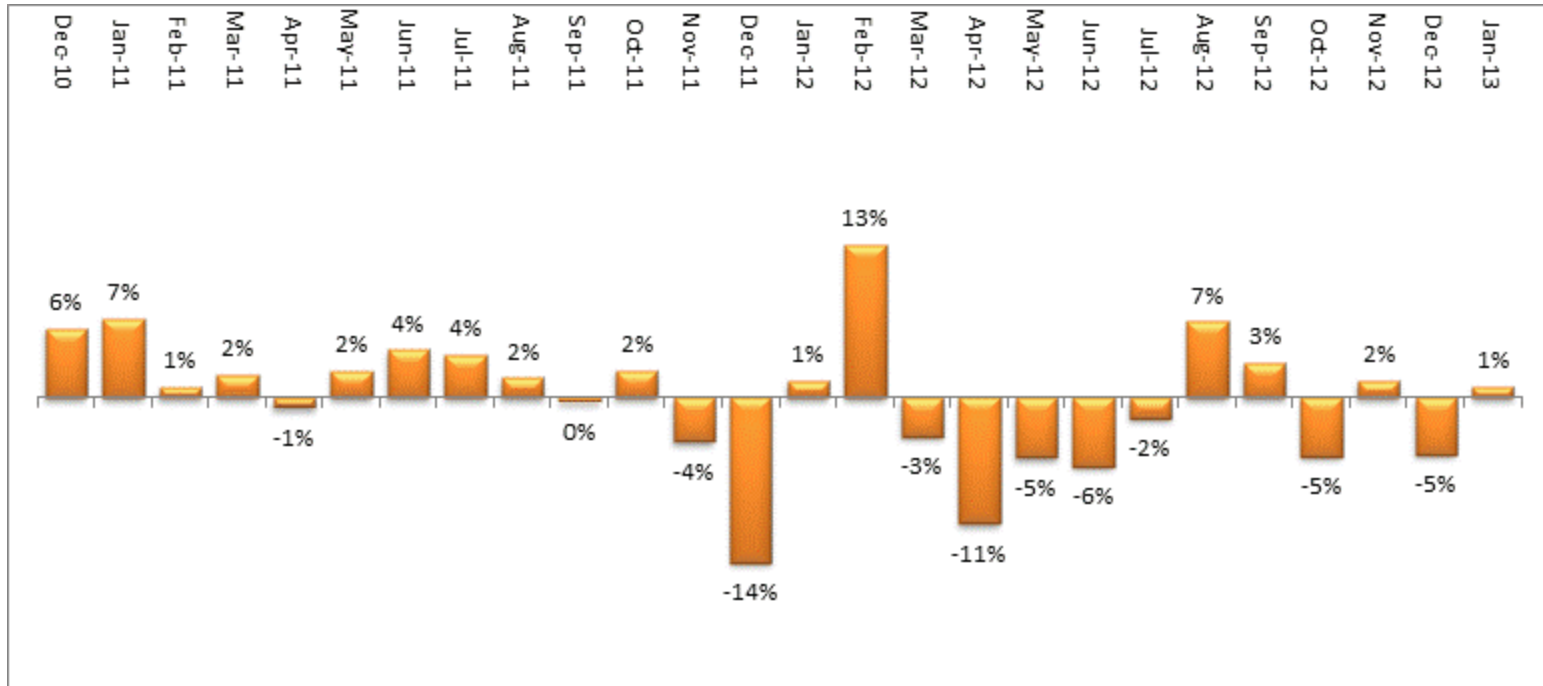
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



The decorating segment drives the decline in the DIY/gardening sector as emulsion paint and wall coverings fall 8% and 10% respectively.

# How Has the Automotive Sector Performed?

Month on Month % Growth in Sector Value  
(this month versus the same month last year)



The total automotive sector was in growth compared to the same month last year, helped by strong sales of winter chemicals (screen wash, anti-freeze and de-icer) due to the colder weather conditions.



# For Further Insight and Enquiries:

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© GfK 2013 | Market-I (Tracks performance at sector level for total retail market – see pages 29-30 for sector definition)

# Useful Information

Distribution Channels Tracked

Product Categories Tracked

# Distribution Channels Tracked in the UK

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Accurately tracking a universe of 67,000 shops via live electronic point of sale data delivered by the retailer on a weekly or monthly basis.

All major distribution channels are covered:

- Computer Shops
- Pure Players
- Telecommunications Specialists
- Supermarket and Cash & Carry Stores
- Variety Chains
- Mail Order Houses
- Department Stores
- Book Stores
- Stationers and Consumable Specialists
- DIY Superstores, DIY Specialists and Garden Centres
- Kitchen Specialists
- Car Accessories Retailers, Car Dealers and Car Audio Specialists
- Electrical Specialists
- Photo Specialists
- Chemists
- Jewellers
- Tyre Specialists

# Product Categories Tracked



## **AUTOMOTIVE**

ANTI FREEZE  
BRAKE CLEANERS  
DE-ICER  
CARBURETTOR CLEANERS  
CHROME/ALUMINIUM CLEANERS  
CONTACT SPRAY/RUST RELEASERS  
ENGINE CLEANERS/DEGREASERS  
ENGINE OILS  
ENGINE AND PETROL ADDITIVES  
EXHAUST REPAIR/MAINTENANCE  
GENERAL CLEANER  
GLASS CLEANER/RAIN REPELLANTS  
OTHER LUBRICANTS  
PAINT CARE PRODUCTS  
PLASTIC/SYNTHETIC CLEANERS  
SCREENWASH  
TEMPORARY TYRE REPAIR  
TROLLEY/CAR SEAT  
TYRE CLEANERS  
UPHOLSTERY CLEANER  
WHEEL CLEANER

## **Major Domestic Appliances**

Cookers and Ovens  
Fridges/Fridge Freezers  
Dishwashers  
Freezers  
Hobs  
Hoods  
Microwave Ovens  
Spin Dryers  
Tumble Dryers  
Washing Machines

## **DIY / Gardening**

ALERT DETECTORS  
AXES AND ACCESSORIES  
BENCHTOP MINI TOOLS  
BENCHTOP TOOLS  
BOLT CUTTERS  
CHISELS/BOLSTERS  
COMPACT FLUORESCENT LAMPS  
DECORATIVE GARDEN PRESERVES  
DECORATIVE EQUIPMENT  
DECORATIVE PLASTER  
DIY ADHESIVE TAPES  
DIY ADHESIVES  
DRILLS AND BRACES  
ELECTRIC CROW BARS  
ELECTRIC DRILLS  
ELECTRIC GLUE GUNS  
ELECTRIC HEAT GUNS  
ELECTRIC POWER FILES  
ELECTRIC SCRAPERS  
ELECTRIC LASER LEVELS  
ELECTRIC ANGLE GRINDERS  
ELECTRIC PLANERS  
ELECTRIC ROUTERS  
ELECTRIC SANDERS  
ELECTRIC SAWS  
ELECTRIC TACKERS  
ELECTRIC PAINT ROLLERS  
ELECTRIC ROTARY HAMMERS  
DIY RULERS  
SCREW DRIVERS  
SEALANTS  
SEALERS AND WATERPROOFERS  
SHOWERS  
SOCKETS AND RATCHETS  
SOIL CONDITIONER  
SPECIAL HAND TOOLS  
SPECIAL PAINTS  
ELECTRIC SCREW DRIVERS  
ELECTRIC SPRAY GUNS  
ELECTRIC WALLPAPER STRIPPERS  
EMULSION PAINT  
FERTILIZERS  
FILLERS  
FLUORESCENT LAMPS  
GARDEN HAND TOOLS  
GARDEN HAND SHEARS  
GRIPPING TOOLS  
GROWING MEDIA  
HALOGEN LAMPS  
HAMMERS  
HAND LAWNMOWERS  
HAND FILES  
HAND PLANERS  
HAND SAWS  
HOUSEHOLD INSECTICIDES  
HIGH PRESSURE CLEANERS  
HOSE END ATTACHMENTS  
HOSES AND STORAGE  
INCANDESCENT LAMPS  
INTRUDER SECURITY  
KNIVES AND BLADES  
LAWN SEED  
LAWN SPREADER  
LED LAMPS  
LEVELS  
STAPLE GUNS  
TILE ADHESIVES  
TILE GROUT  
TILES  
TOOLSETS AND STORAGE  
TRIM PAINT  
TRIMMERS/BRUSHCUTTERS  
VARNISH  
WALL COVERINGS

MARKING OUT TOOLS  
MEASURING TAPES  
METAL PAINTS  
MINI TOOLS  
MOULDINGS AND COVINGS  
MULTI TOOLS  
WOOD FINISH  
OUTDOOR BARBEQUES  
PAINT BRUSHES  
PAINTING AIDS  
PAINT AND VARNISH REMOVER  
PLANT AUXILIARY PRODUCTS  
PLANT PROTECTION  
PLIERS  
POWERED CHAIN SAWS  
POWERED LAWNMOWERS  
POWERED SCARIFIERS  
POWERED BLOW VACS  
POWER TOOL ACCESSORIES  
POWERED GRASS SHEARS  
POWERED HEDGE TRIMMERS  
POWERED SHREDDERS  
PRIMERS/UNDERCOATS  
PRUNING SAWS  
PU FOAM  
PUMPS  
RENOVATION CLEANERS  
RIVETERS  
WALL DECORATIONS  
WATER TIMERS  
WILD BIRD CARE  
WOOD FILLERS  
WOOD STAIN  
WOOD TREATMENT  
WORKBENCHES  
WRENCHES

# Product Categories Tracked



## Office

Ballpoint Pens	Mechanical Pencils
Binding Systems	Office Adhesive Tapes
Calculators	Office Adhesives
Coated Paper	Office Non-tracked Products
Colour Feltpens	Office Paper
Colouring Pencils	OHP Pens
Compasses	Pencil Cases
Correction Products	Perforators
Crayons	Print Cartridges
Fountain Pens	Repositionable Notes
Graphite Pencils	Rollerballs
Highlighters	Scissors
Laminating Accessories	Shredders
Laminating Systems	Staplers
Lettering Machinery	Stationery Accessories
Lever Arch Files	Suspension Filing Systems
Markers	Writing Feltpens

## Small Domestic Appliances

Blood Pressure Monitors	Electric Beauty
Bread Makers	Food Preparation
Digital Thermometers	Hair Dryers
Food Steamers	Hair Styling
Fun Cooking	Hair Clippers
Mini Ovens	Ice Cream Makers
Air Conditioners	Irons
Air Treatment	Kettles
Bakeware	Pans
Can Openers	Personal Scales
Juice Extractors	Pots
Coffee Grinders	Pressure Cookers
Hot Beverage Makers	Rice Cookers
Deep Fryers	Sandwich Toasters
Dental Care Products	Shavers
Electric Blankets	Toasters
Electric Heating	Steam Cleaners
Electric Knives	Vacuum Cleaners

## IT

- Static Computers
- Portable Computers
- Monitors
- Printers
- Multifunctional Devices
- Data/Video Projectors
- Facsimiles
- Scanners
- Web Cameras
- Communication Cards
- CD/DVD Writers
- Keying Devices
- PC/Mini Speakers
- Pointing Devices
- TV Cards/Tuners
- Storage Devices
- Communication Devices
- Power Management
- Software
- Small Organising Solutions
- Gaming Devices

## Telecommunications

- Fixed Line Telephones
- Headsets
- Mobile Phone Accessories
- Mobile Phone Handsets
- Mobile Phone Tariffs
- Smart Phones

## Consumer Electronics

CD Recording Media	Amplifiers
Video Tapes	Receivers
DVD Recording Media	Tuners
CRT Televisions	Radio Recorders
TV Recorders	Portable Radios
Video Recorders	Clock Radios
Portable Televisions	Dictation Systems
Panel Televisions	Headphones
Set Top Boxes	Headphone Stereos
DVD Players/Recorders	Universal Remote Controls
Digital TV Accessories	Digital Portable Audio Players
Battery Chargers	Digital Portable Video Players
Dry Batteries	Car Audio
USB Memory	Car Speakers
Camcorders	Car Navigation
MD Players/Recorders	Car Vision
Turntables	Videogames Consoles
Loudspeakers	Camcorder Powerpacks
CD Players/Recorders	Torches
Audio Home Systems	MP3 Accessories

## Photo

- Imaging Accessories
- Binoculars
- Non-Digital Cameras
- Interchangeable Lenses
- Digital Cameras
- Films
- Memory Cards
- Image Displays