



world **dab**

# SUMMIT

2021

9 Nov

## Audio devices

### Retail sales update

Max Templeman

Insight Director, Consumer Electronics & Photo



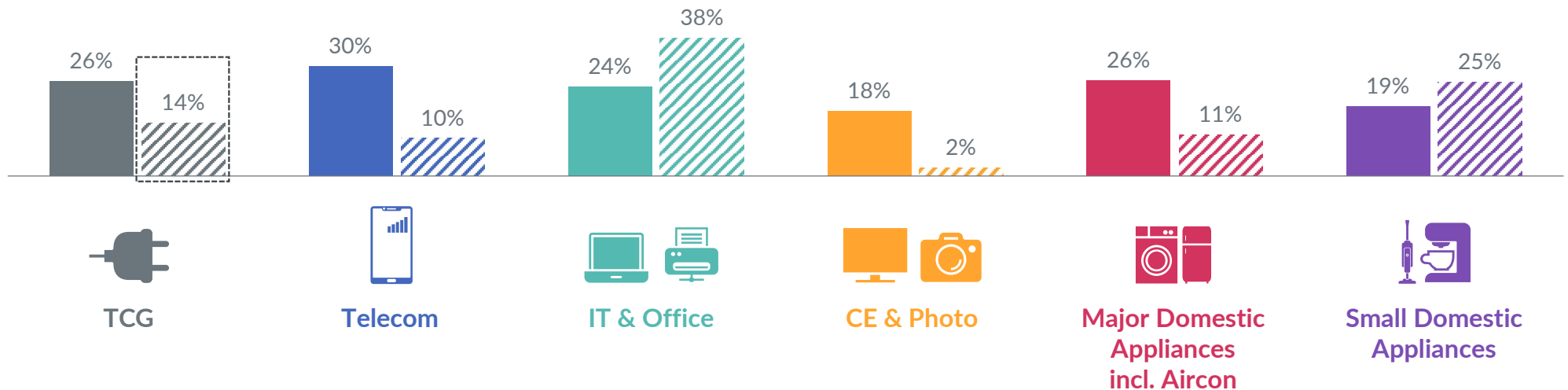
# All segments show growth vs 2019

## CE & Photo “disappoints” with only 2% growth



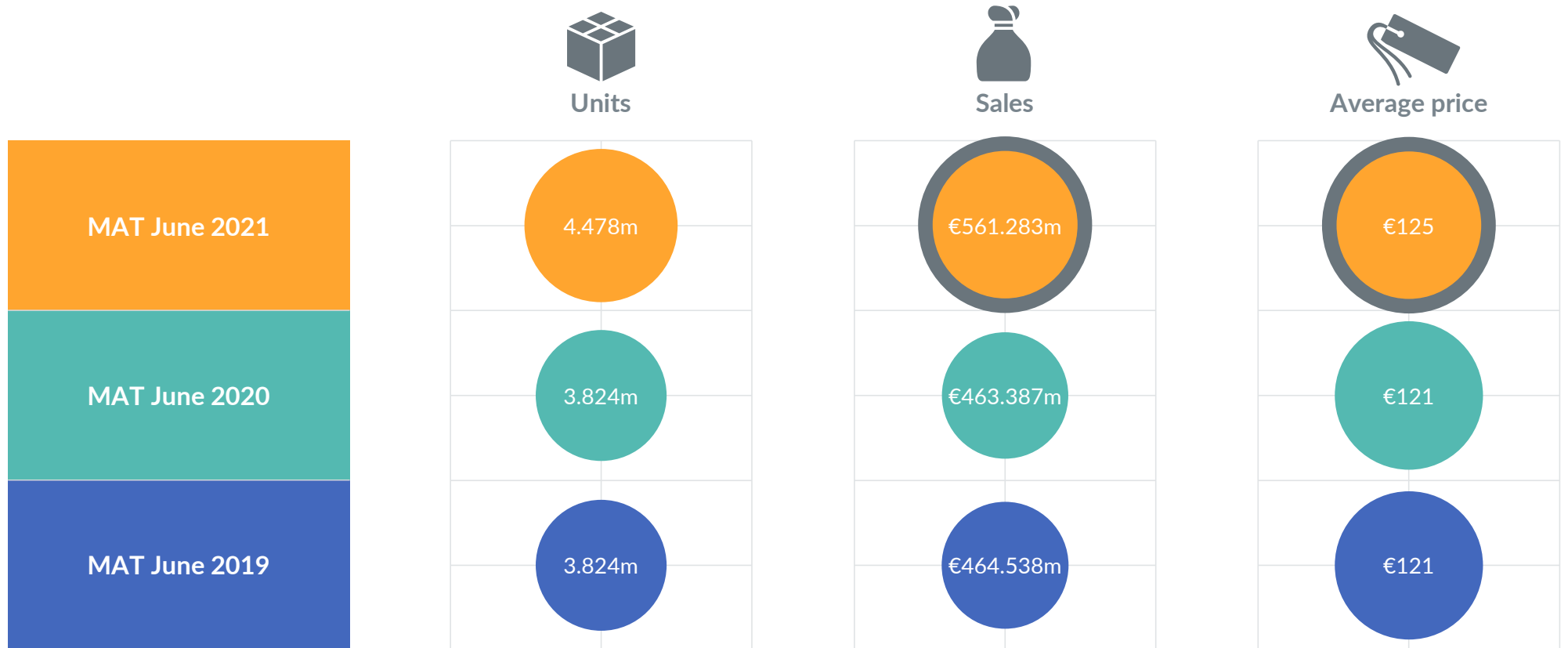
USD value growth | 2021 vs 2020 resp. 2021 vs. 2019

■ 2021 vs. 2020    ▨ 2021 vs. 2019



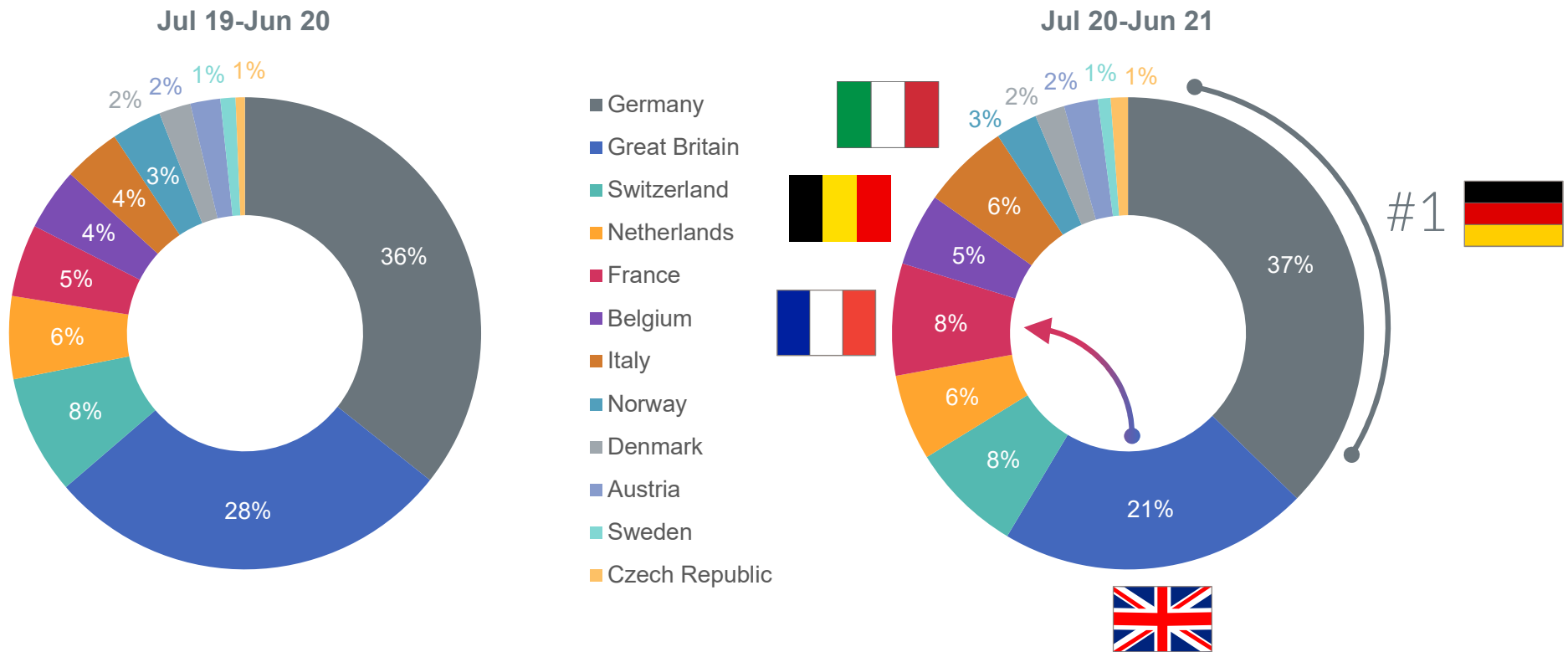
Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America), USD (NSP) revenue growth 2021 vs 2020 resp. 2021 vs. 2019.  
 CE includes Multifunctional Technical Devices and SDA includes Personal Diagnostics

# MAT 2021 sees a significant rise in purchases



Source: GfK Panelmarket, Data to June 2021, EU12, Sales Volume, Value & Price, Digital Radios

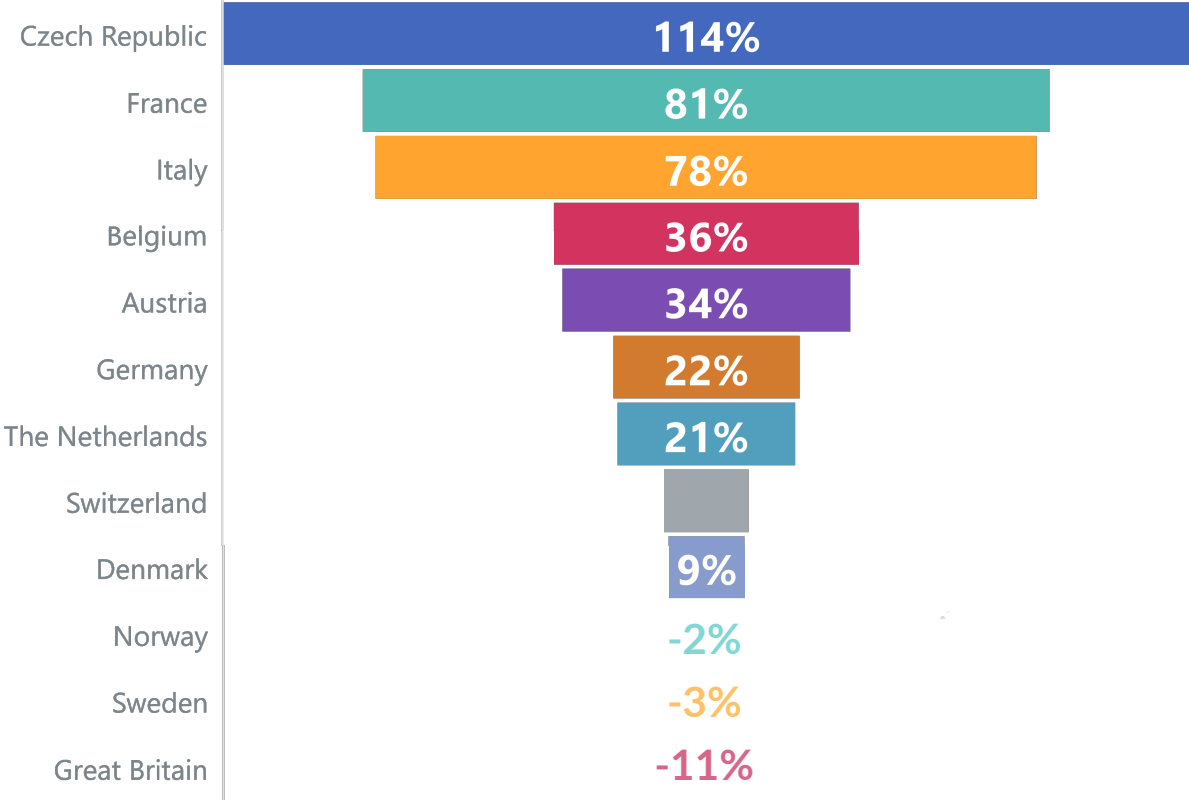
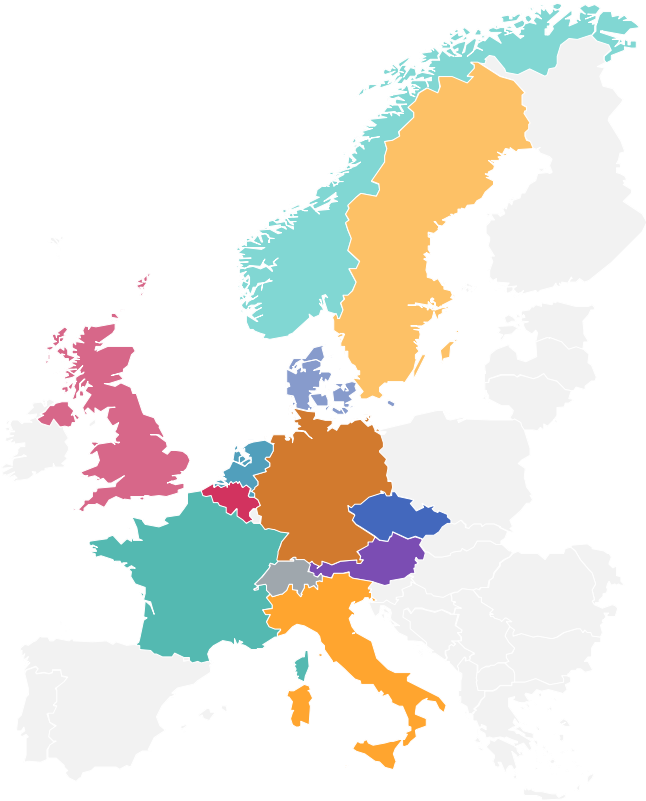
# Germany remains on top, France gains from GB



Source: GfK Panelmarket, Data to June 2021, EU12, Sales Volume, Digital Radios

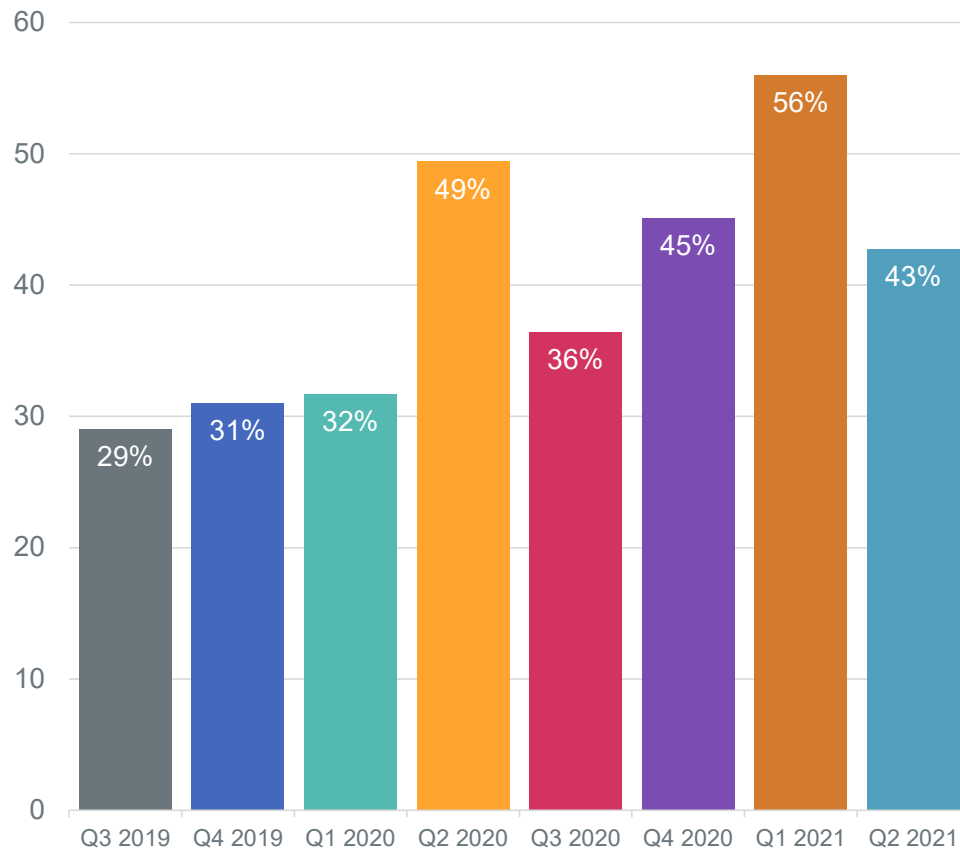
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# Czech Republic sees Digital Radio sales double



Source: GfK Panelmarket, Data to June 2021, EU12, Sales Volume Growth, Digital Radios

# Online sales of Digital Radios peaks at 56%



Source: GfK Panelmarket, Data to June 2021, EU12, Online Share/Sales Volume, Digital Radios

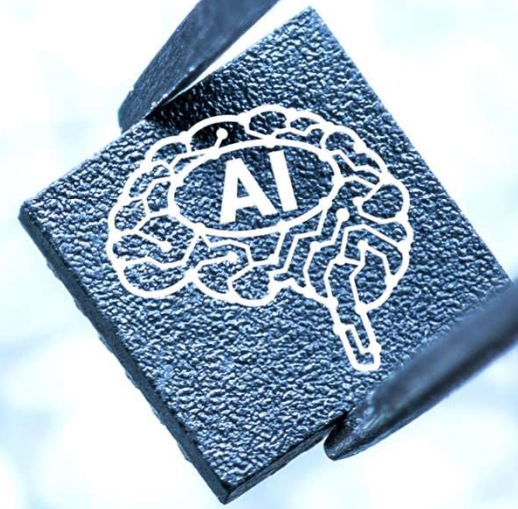
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# More sophisticated devices shine through



	With AI	Without AI
Growth	227%	16%
Share	1%	99%
Price	€225	€124



	With BT	Without BT
Growth	37%	-2%
Share	58%	42%
Price	€170	€64

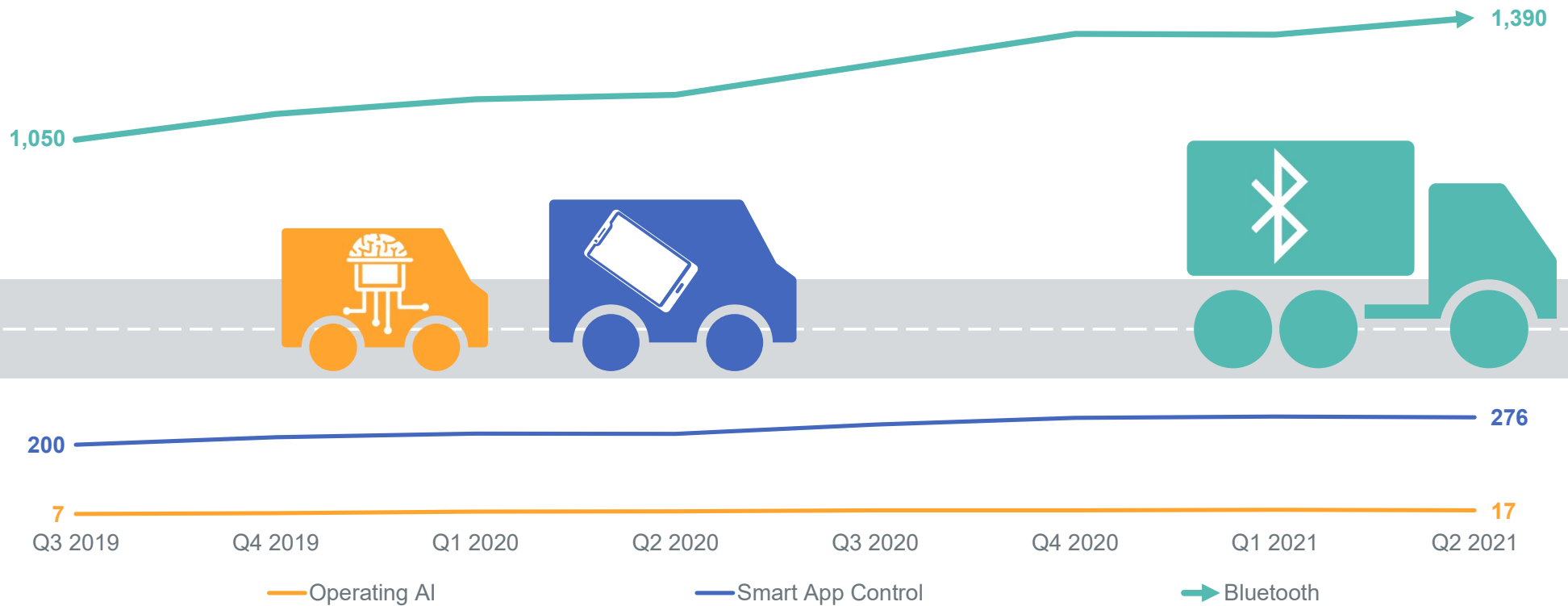


Source: GfK Panelmarket, Data to June 2021, EU12, Operating AI/Bluetooth Share/Growth Volume, Digital Radios

# Bluetooth still out in front of Smart Radios



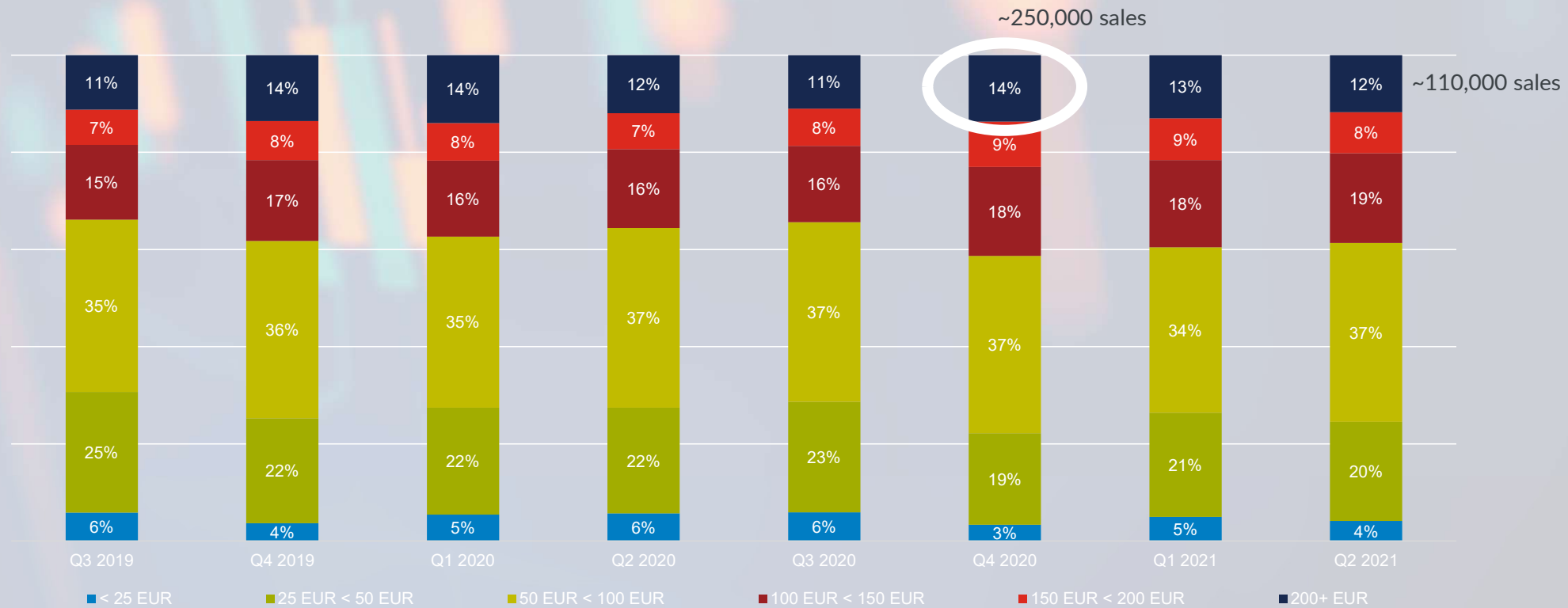
Number of different selling items



Source: GfK Panelmarket, Data to June 2021, EU12, Number of Selling Items, Digital Radios



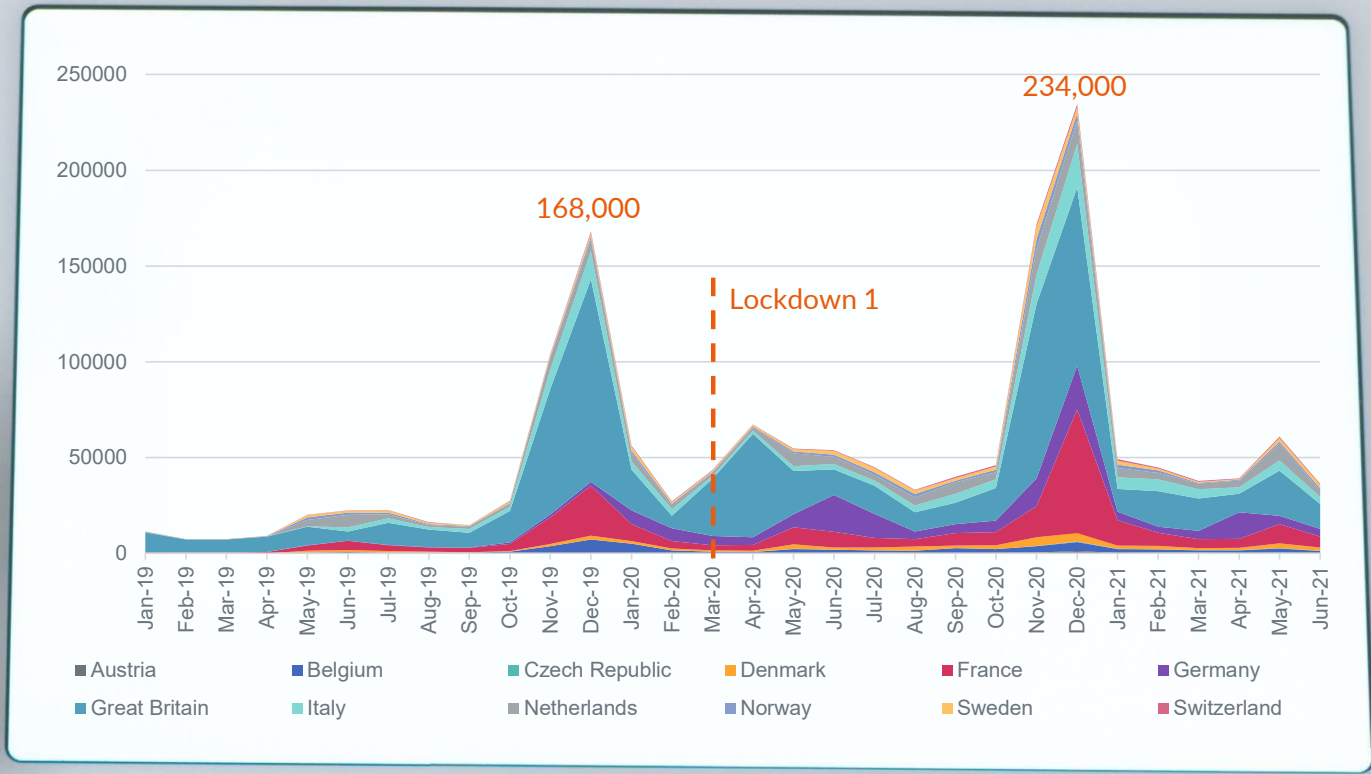
# Price-bands stay relatively consistent



Source: GfK Panelmarket, Data to June 2021, EU12, Sales Volume, Digital Radios

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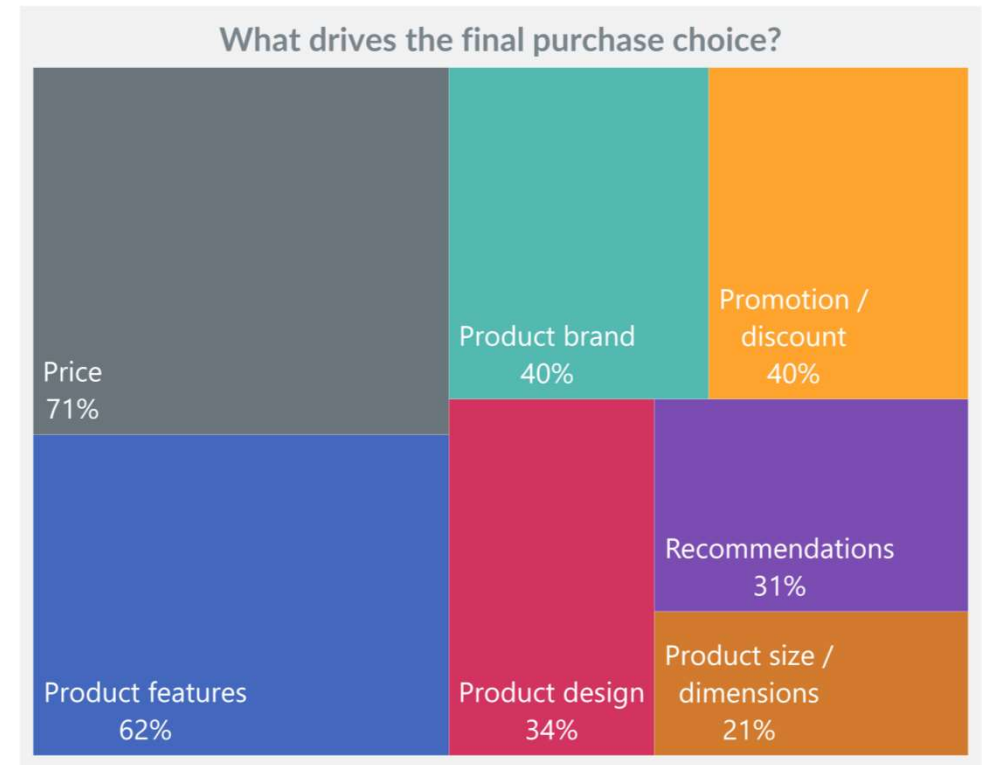
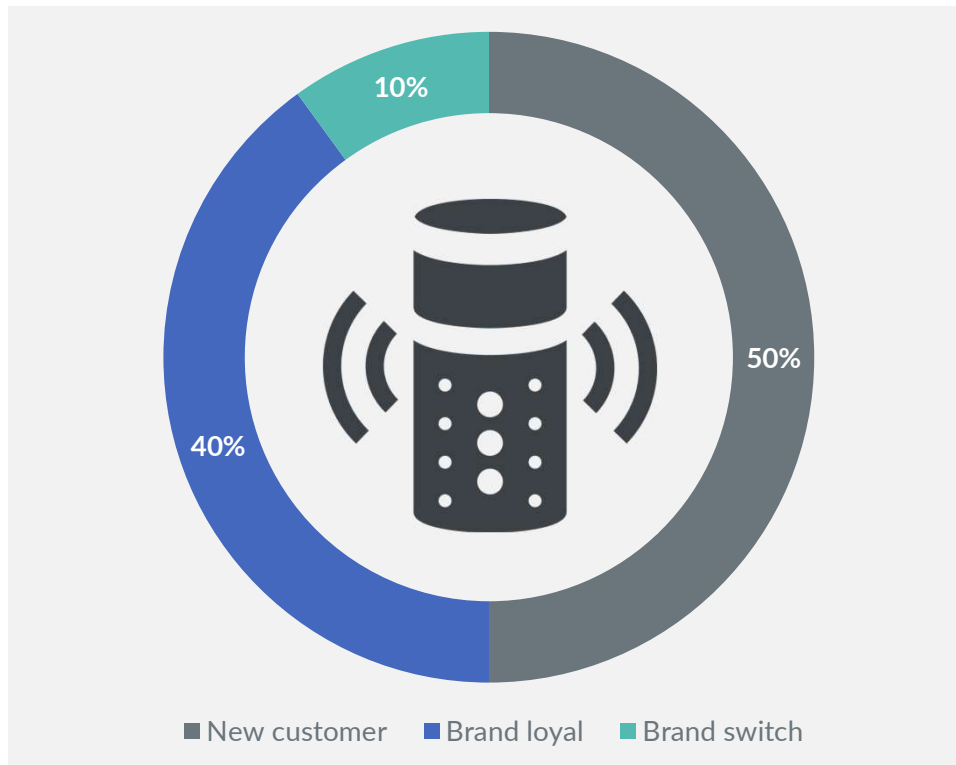
# Smart Displays continue to rise



Source: GfK Panelmarket, Data to June 2021, EU12, Sales Volume, Smart Displays

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# Smart Speakers drive consumer loyalty



Source: GfK Consumer Insight Engine, April 2020 to March 2021, Germany & GB, Smart Speakers

# TAKE-OUTS



TOTAL 2021 SPENDING UP VERSUS 2020, BUT CONSUMER ELECTRONICS ONLY SHOWS A SMALL VALUE INCREASE

AVERAGE PRICE OF DIGITAL RADIOS RISES BY 4 EUROS, BRINGING THE MARKET VALUE TO 561 MILLION EUROS IN THE LAST 12 MONTHS

GERMANY, FRANCE, ITALY & BELGIUM INCREASE SHARE OF TOTAL EUROPE DAB SALES - BUT CZECH REPUBLIC SEES HIGHEST GROWTH

OVER HALF OF ALL DAB SALES OCCURED ONLINE IN Q1 2021 - RETAILERS MUST ENSURE THEY ARE READY FOR LONG TERM INCREASED DEMAND

CONSUMERS NOW HAVE AN ENORMOUS CHOICE OF DAB PRODUCTS, WITH THE 'BLUETOOTH ENABLED' RANGE OVER 4-FIGURES

DAB RADIOS OVER 200 EUROS STILL PROVIDE A HEALTHY MARKET SHARE AND GAIN IMPORTANCE IN Q4



# Thank you!



Max.Templeman@Gfk.com