



Growth
from
Knowledge



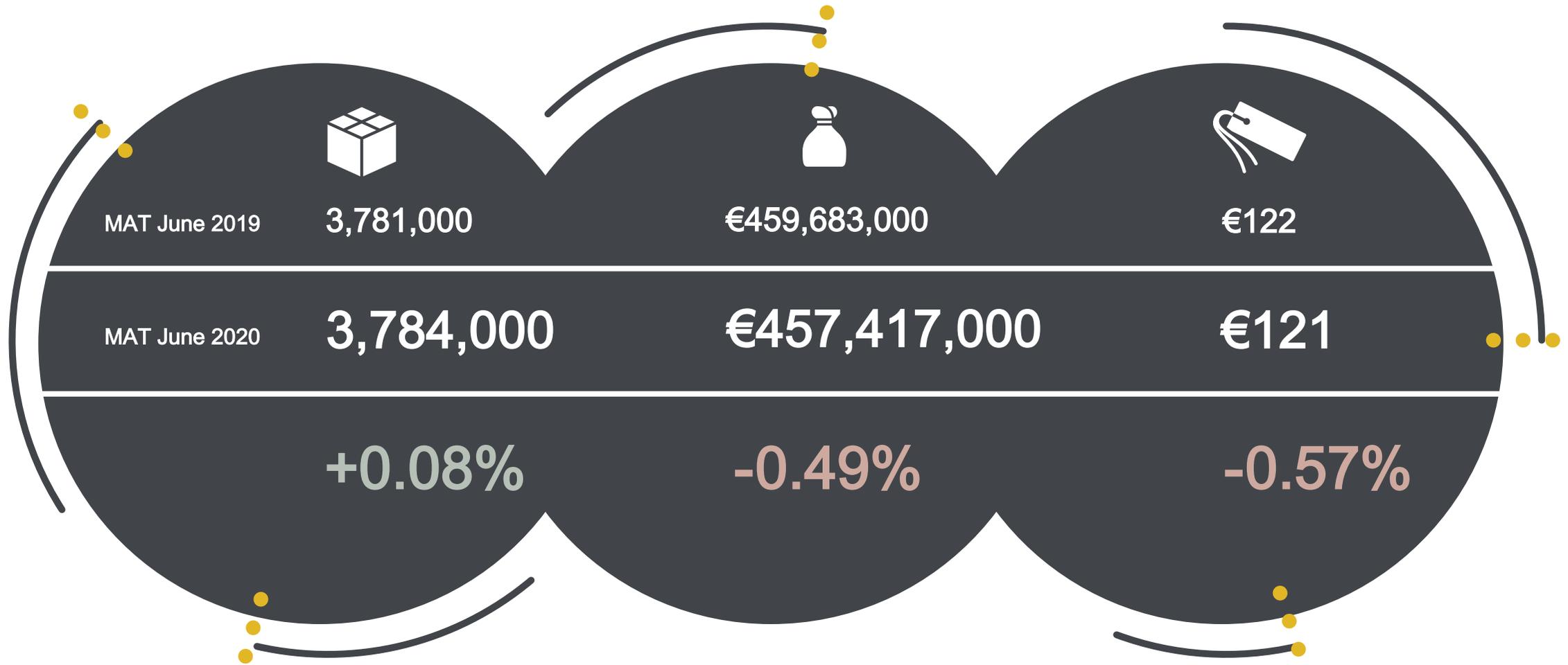
Virtual Conference 2020

Max Templeman

Insight Director, Consumer Electronics & Photo



Top-line digital radio figures for the latest year



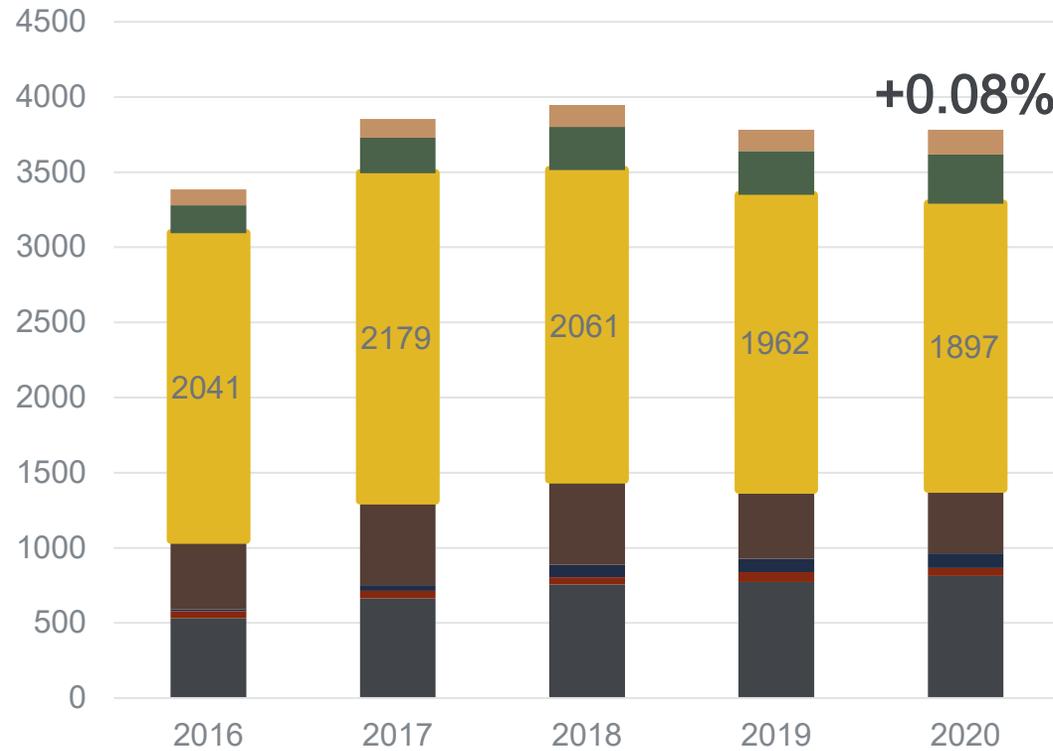
Source: GfKPanelmarket, EU12, Sales Volume, Value & Price, Digital Radios

2018 peak in sales sees two years of value decline

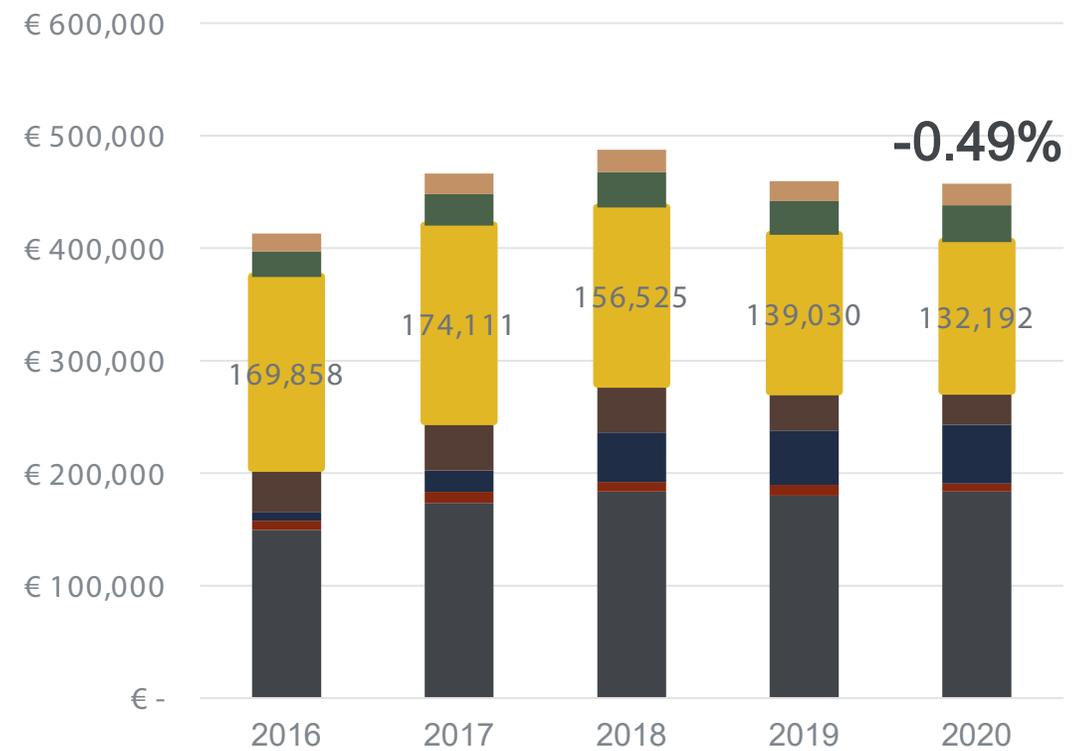


Portable Radios easily remain the largest volume segment

MAT June 2016-20



MAT June 2016-20



AHS



Tuners



Receivers



Clock Radios



Portable Radios



Radio Boombox



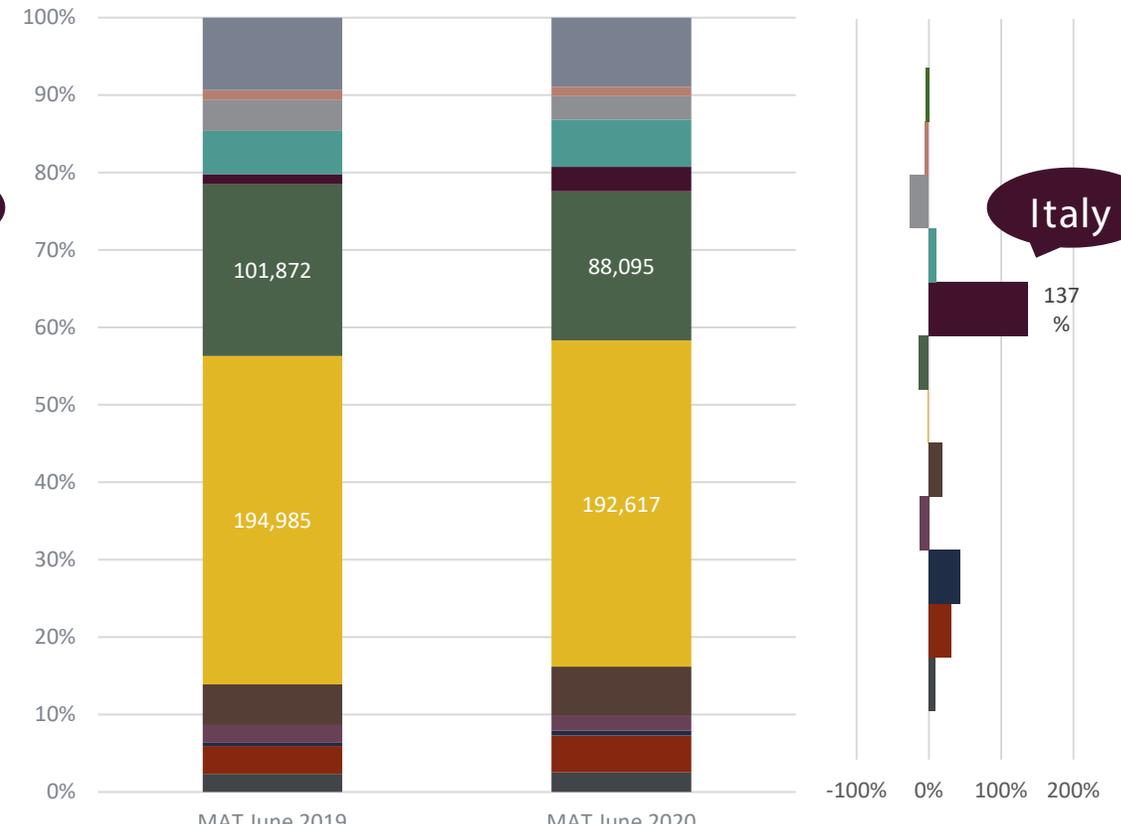
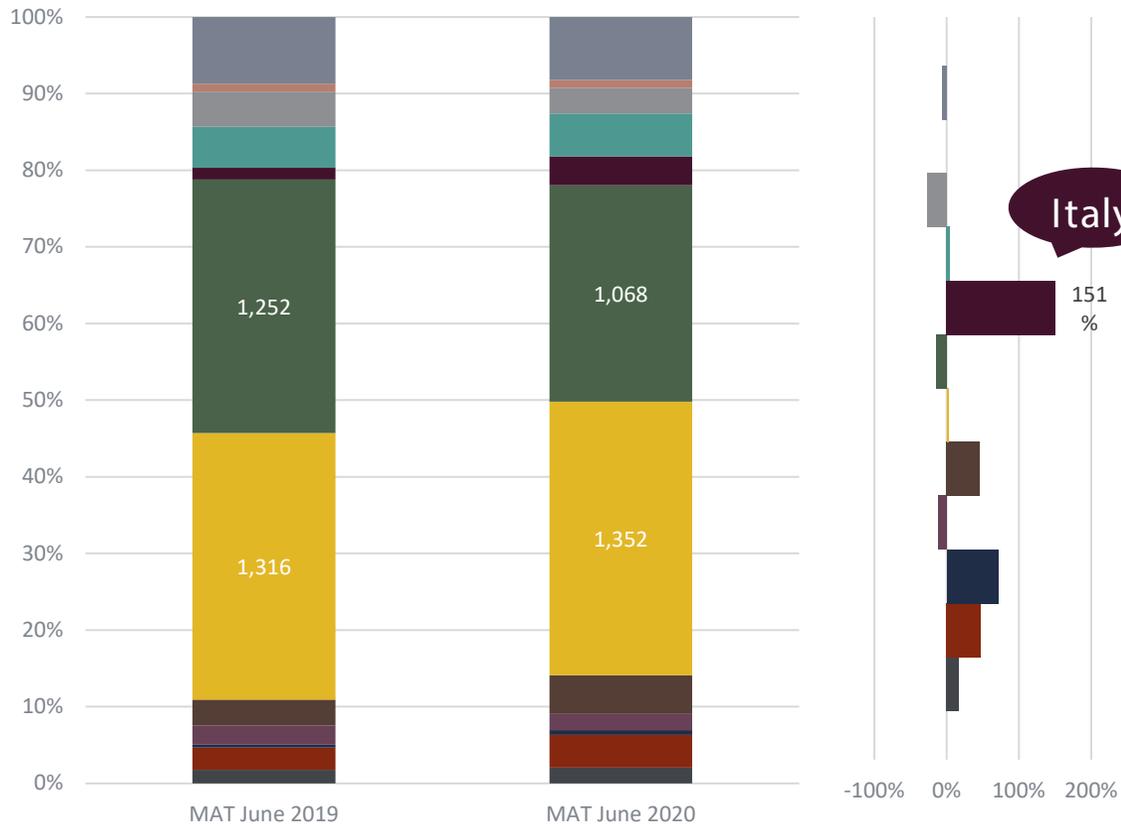
In Car Audio

Source: GfK Panelmarket, EU12, Sales 000s Volume & Value, Digital Radios

Country share and performance for DAB



Germany, the largest country for DAB, shows 3% volume growth, but 1% value decline



- Austria
- Belgium
- Czech Republic
- Denmark
- France
- Germany
- Great Britain
- Italy
- Netherlands
- Norway
- Sweden
- Switzerland

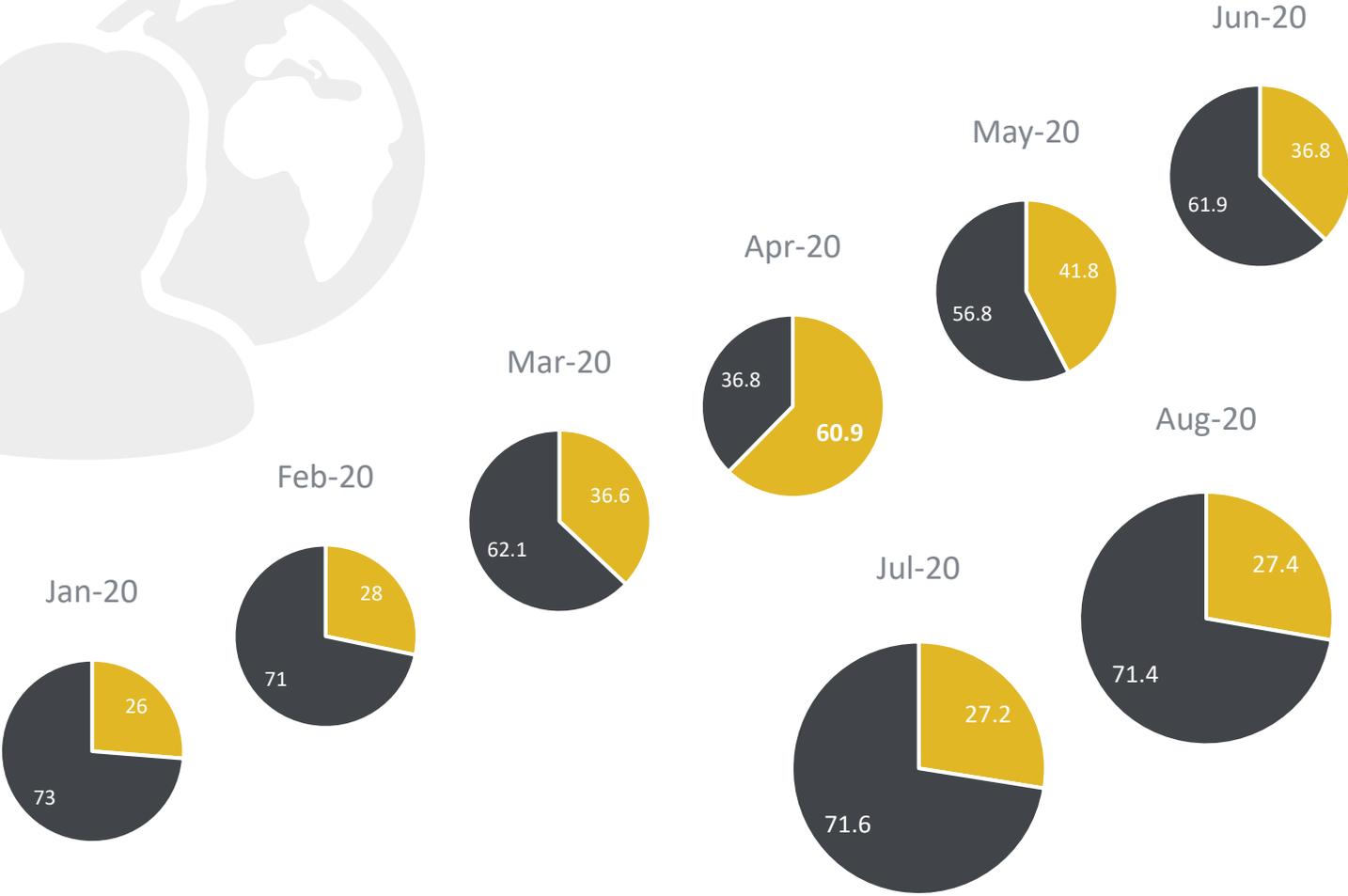
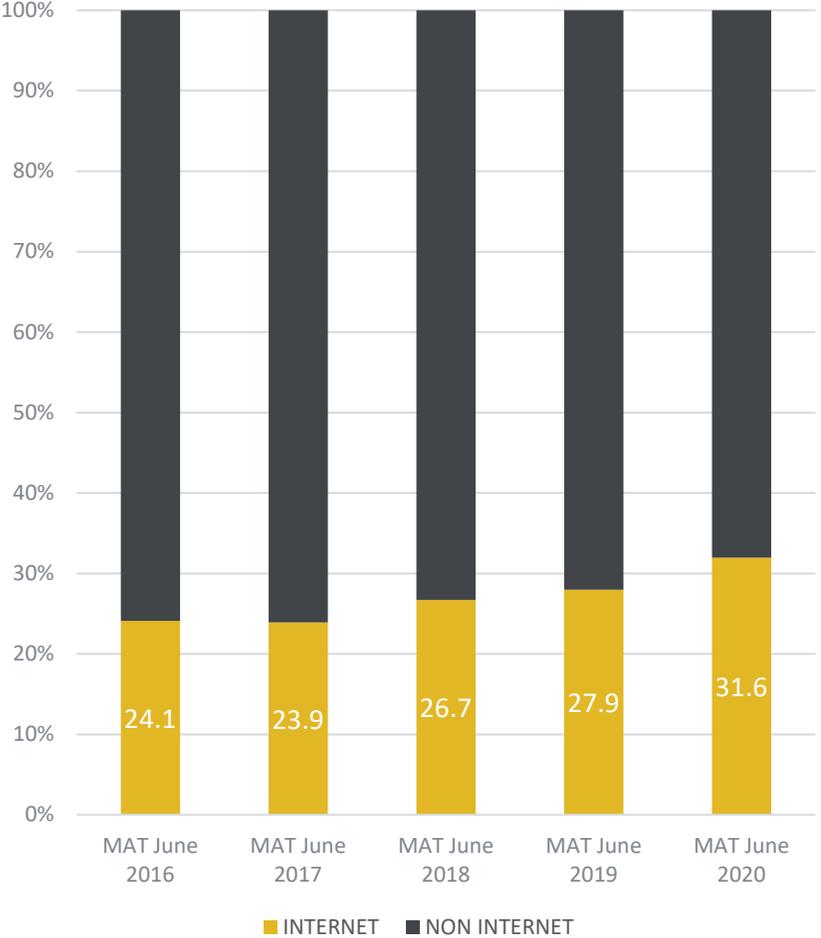
- Austria
- Belgium
- Czech Republic
- Denmark
- France
- Germany
- Great Britain
- Italy
- Netherlands
- Norway
- Sweden
- Switzerland

Source: GfKPanelmarket, EU12, Sales Volume & Value, Digital Radios

Online reached 32% of annual revenue



April saw over 60% of sales online, with recovery now back to pre-virus levels



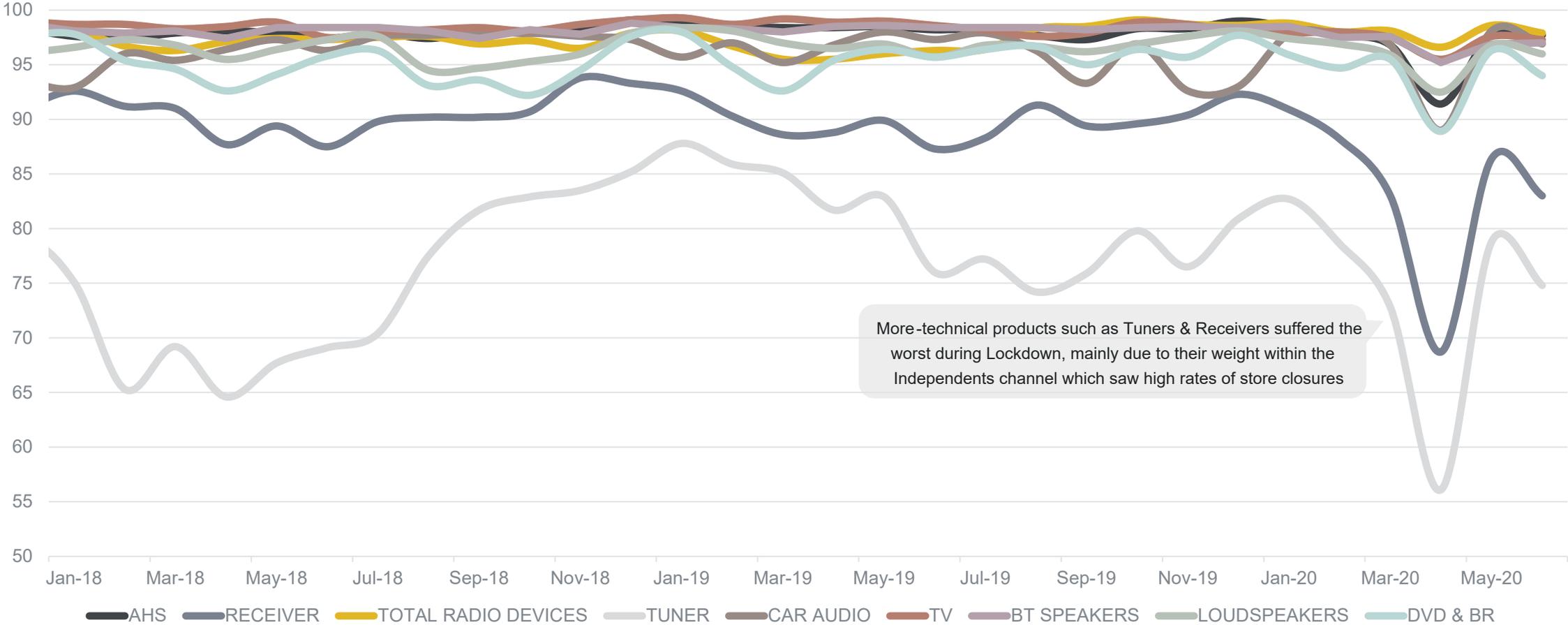
Source: GfKPanelmarket, EU12, Sales Value Share, Digital Radios

Long term distribution: Availability of product categories



TV replaced by Radio in 2020

Whilst all categories suffered declines earlier in the year, most have recovered to nearly the same as before Lockdown, but Radio remained the most 'available' product with over 96% Unweighted Distribution in April



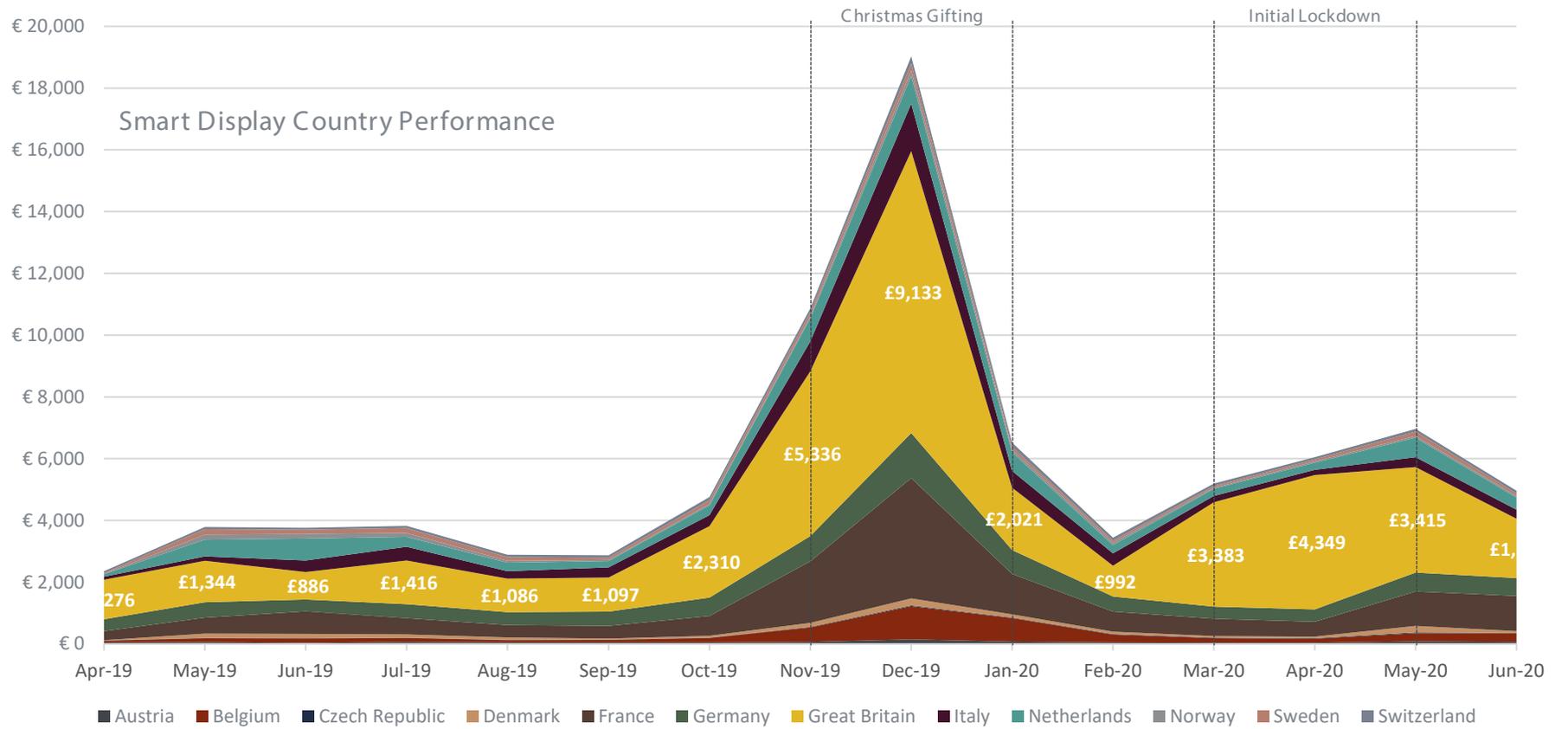
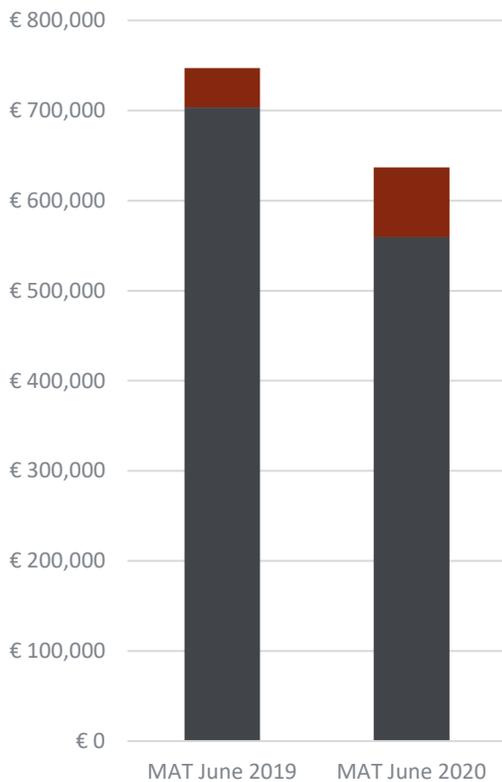
More-technical products such as Tuners & Receivers suffered the worst during Lockdown, mainly due to their weight within the Independents channel which saw high rates of store closures

Source: GfKPanelmarket, EU12, Unweighted Distribution in Total Product Category

Smart Audio drops into decline, whilst Smart Displays benefit from Lockdown

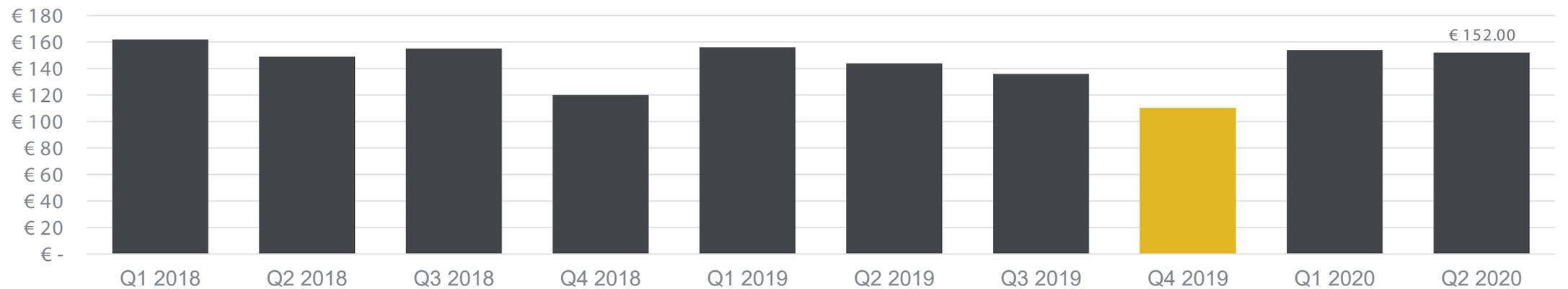
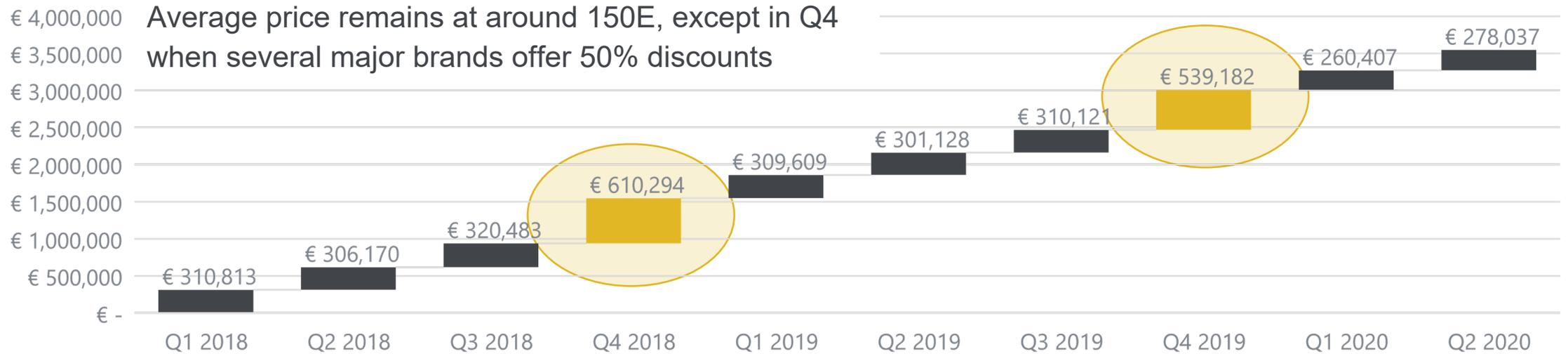


GB saw significant increases to Smart Displays during the 'initial' Lockdown months



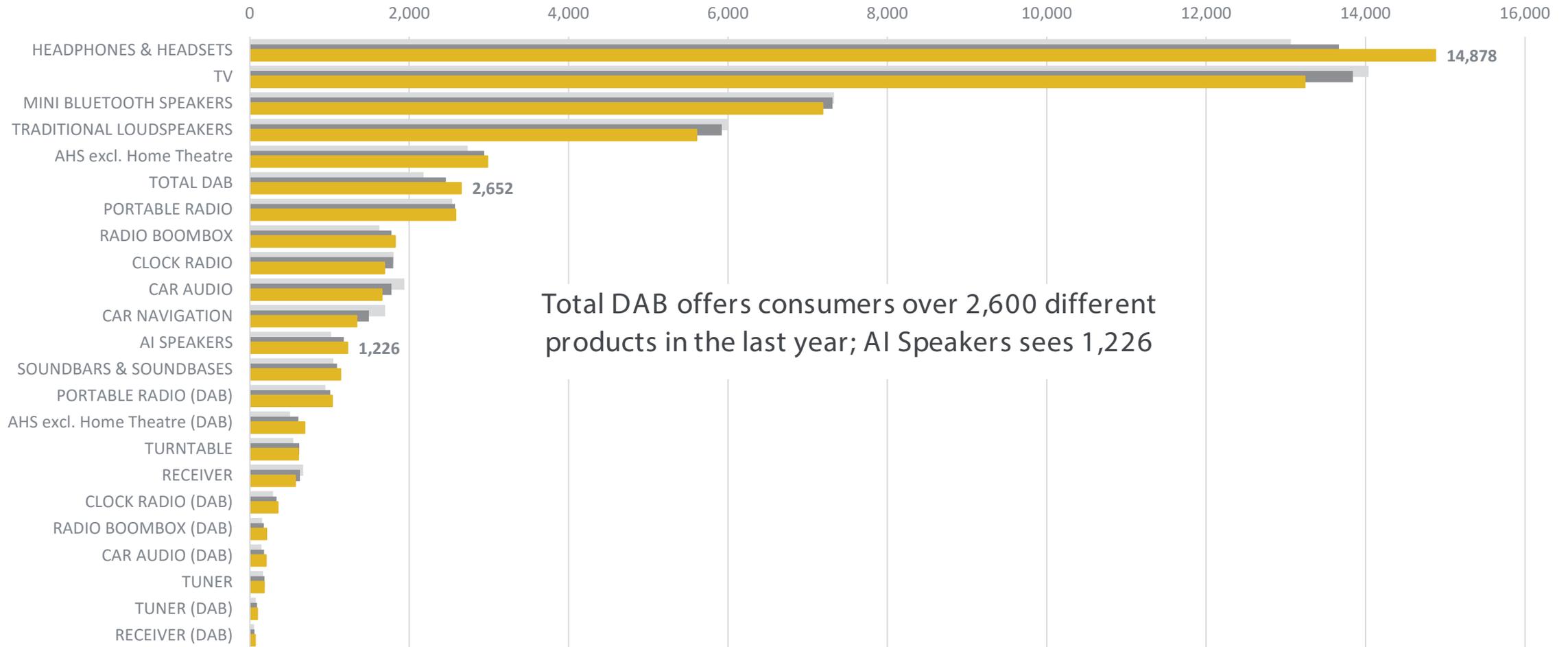
Source: GfKPanelmarket, EU12, Sales Value, Smart Audio & Smart Displays (multiroom audio products, part of AHS)

AI Speakers remain popular, albeit focused around Q4 and Gifting



Source: GfKPanelmarket, EU12, Sales Value & Price, AI Speakers (Smart App or Voice Control products, part of AHS and Bluetooth Speakers)

Consumer choice within Home Electronics remains very strong



Total DAB offers consumers over 2,600 different products in the last year; AI Speakers sees 1,226

Source: GfK Panelmarket, EU12, Number of Selling Models

■ MAT June 2018 ■ MAT June 2019 ■ MAT June 2020

Thank you!