



# Passport

## Home Audio and Cinema in Australia

Euromonitor International

October 2020

# LIST OF CONTENTS AND TABLES

Home Audio and Cinema in Australia - Category Analysis.....	1
KEY DATA FINDINGS.....	1
2020 IMPACT.....	1
COVID-19 impact on home audio and cinema .....	1
Home cinema and speaker systems continues to grow.....	1
Leader Sony losing share as Yamaha and JBL gain share .....	1
RECOVERY AND OPPORTUNITIES .....	2
E-commerce continues taking share from physical stores in 2020 .....	2
Home audio and cinema is becoming smarter than ever .....	2
Wireless speakers continues to take sales from audio separates and hi-fi systems.....	2
CATEGORY DATA.....	2
Table 1 Sales of Home Audio and Cinema by Category: Volume 2015-2020.....	2
Table 2 Sales of Home Audio and Cinema by Category: Value 2015-2020.....	3
Table 3 Sales of Home Audio and Cinema by Category: % Volume Growth 2015-2020 .....	3
Table 4 Sales of Home Audio and Cinema by Category: % Value Growth 2015-2020 .....	3
Table 5 NBO Company Shares of Home Audio and Cinema: % Volume 2016- 2020 .....	4
Table 6 LBN Brand Shares of Home Audio and Cinema: % Volume 2017- 2020 .....	4
Table 7 Distribution of Home Audio and Cinema by Channel: % Volume 2015- 2020 .....	5
Table 8 Forecast Sales of Home Audio and Cinema by Category: Volume 2020-2025.....	5
Table 9 Forecast Sales of Home Audio and Cinema by Category: Value 2020- 2025 .....	5
Table 10 Forecast Sales of Home Audio and Cinema by Category: % Volume Growth 2020-2025 .....	6
Table 11 Forecast Sales of Home Audio and Cinema by Category: % Value Growth 2020-2025 .....	6
Consumer Electronics in Australia - Industry Overview .....	7
EXECUTIVE SUMMARY .....	7
COVID-19 impact on consumer electronics .....	7
COVID-19 country impact.....	7
Company response.....	7
Retailing shift .....	7
What next for consumer electronics?.....	8
MARKET DATA.....	8
Table 12 Sales of Consumer Electronics by Category: Volume 2015-2020.....	8
Table 13 Sales of Consumer Electronics by Category: Value 2015-2020.....	8
Table 14 Sales of Consumer Electronics by Category: % Volume Growth 2015- 2020 .....	8
Table 15 Sales of Consumer Electronics by Category: % Value Growth 2015- 2020 .....	9

Table 16	NBO Company Shares of Consumer Electronics: % Volume 2016-2020 .....	9
Table 17	LBN Brand Shares of Consumer Electronics: % Volume 2017-2020 .....	9
Table 18	Distribution of Consumer Electronics by Channel: % Volume 2015-2020 .....	10
Table 19	Forecast Sales of Consumer Electronics by Category: Volume 2020-2025 .....	10
Table 20	Forecast Sales of Consumer Electronics by Category: Value 2020-2025 .....	11
Table 21	Forecast Sales of Consumer Electronics by Category: % Volume Growth 2020-2025 .....	11
Table 22	Forecast Sales of Consumer Electronics by Category: % Value Growth 2020-2025 .....	11
DISCLAIMER .....		12
GLOBAL MACROECONOMIC ENVIRONMENT .....		12
GLOBAL INDUSTRY ENVIRONMENT .....		12
SOURCES.....		12
Summary 1	Research Sources.....	12

# HOME AUDIO AND CINEMA IN AUSTRALIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

- COVID-19 not having a major impact on home audio and cinema sales in 2020

Content removed from sample

## 2020 IMPACT

### COVID-19 impact on home audio and cinema

Despite the three-month COVID-19 national lockdown in Australia, this had a marginal impact...

Content removed from sample

### Home cinema and speaker systems continues to grow

Improved product quality is associated with the increasing popularity of home cinema and speaker...

Content removed from sample

### Leader Sony losing share as Yamaha and JBL gain share

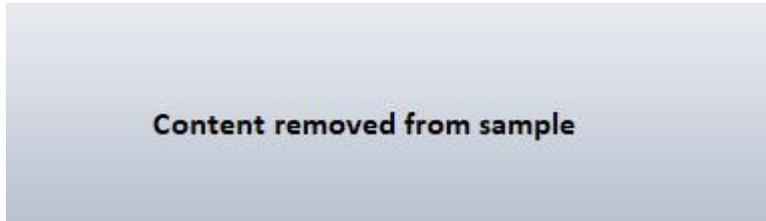
Sony Australia continues to lead home audio and cinema in 2020, although it also continues to lose volume...

Content removed from sample

## RECOVERY AND OPPORTUNITIES

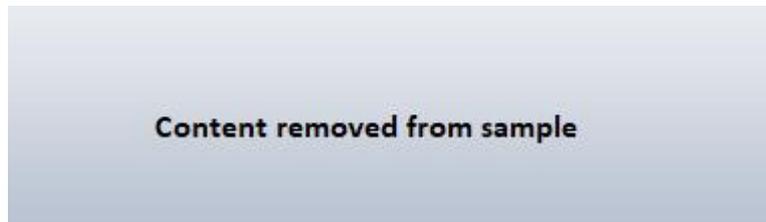
### E-commerce continues taking share from physical stores in 2020

Bricks-and-mortar stores such as JB Hi-Fi and Bing Lee still account for the majority of volume...



### Home audio and cinema is becoming smarter than ever

With modern TVs often now incorporating voice control, an increasing number of home cinema...



### Wireless speakers continues to take sales from audio separates and hi-fi systems

Wireless speakers continues to take sales from bulky and outdated technology such as audio separates and hi-fi systems...



## CATEGORY DATA

Table 1 Sales of Home Audio and Cinema by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Audio Separates	<b>Data removed from sample</b>					
Digital Media Player						
Docks						
Hi-Fi Systems						
Home Cinema and Speaker						

Systems Speakers Other Home Audio and Cinema Home Audio and Cinema	<b>Data removed from sample</b>
---	---------------------------------

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 2 Sales of Home Audio and Cinema by Category: Value 2015-2020**

AUD million	2015	2016	2017	2018	2019	2020
Audio Separates Digital Media Player Docks Hi-Fi Systems Home Cinema and Speaker Systems Speakers Other Home Audio and Cinema Home Audio and Cinema	<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 Sales of Home Audio and Cinema by Category: % Volume Growth 2015-2020**

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Audio Separates Digital Media Player Docks Hi-Fi Systems Home Cinema and Speaker Systems Speakers Other Home Audio and Cinema Home Audio and Cinema	<b>Data removed from sample</b>		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Sales of Home Audio and Cinema by Category: % Value Growth 2015-2020**

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Audio Separates Digital Media Player Docks Hi-Fi Systems Home Cinema and Speaker Systems Speakers Other Home Audio and Cinema Home Audio and Cinema	<b>Data removed from sample</b>		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 NBO Company Shares of Home Audio and Cinema: % Volume 2016-2020**

% retail volume Company	2016	2017	2018	2019	2020
----------------------------	------	------	------	------	------



Others  
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 LBN Brand Shares of Home Audio and Cinema: % Volume 2017-2020**

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------	---------------	------	------	------	------



Others  
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 7** Distribution of Home Audio and Cinema by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Discounters						
-- Hypermarkets						
-- Supermarkets						
-- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Electronics and Appliance Specialist Retailers						
-- Other Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- E-Commerce						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8** Forecast Sales of Home Audio and Cinema by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025
Audio Separates	<b>Data removed from sample</b>					
Digital Media Player						
Docks						
Hi-Fi Systems						
Home Cinema and Speaker Systems						
Speakers						
Other Home Audio and Cinema						
Home Audio and Cinema						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 9** Forecast Sales of Home Audio and Cinema by Category: Value 2020-2025

AUD million	2020	2021	2022	2023	2024	2025
-------------	------	------	------	------	------	------

Audio Separates  
 Digital Media Player  
 Docks  
 Hi-Fi Systems  
 Home Cinema and Speaker  
 Systems  
 Speakers  
 Other Home Audio and  
 Cinema  
 Home Audio and Cinema



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 10 Forecast Sales of Home Audio and Cinema by Category: % Volume Growth 2020-2025**

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Audio Separates	<b>Data removed from sample</b>		
Digital Media Player Docks			
Hi-Fi Systems			
Home Cinema and Speaker Systems			
Speakers			
Other Home Audio and Cinema			
Home Audio and Cinema			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 11 Forecast Sales of Home Audio and Cinema by Category: % Value Growth 2020-2025**

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Audio Separates	<b>Data removed from sample</b>		
Digital Media Player Docks			
Hi-Fi Systems			
Home Cinema and Speaker Systems			
Speakers			
Other Home Audio and Cinema			
Home Audio and Cinema			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# CONSUMER ELECTRONICS IN AUSTRALIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### COVID-19 impact on consumer electronics

Australia went into lockdown in March 2020, with consumer electronics being among the first industries...

**Content removed from sample**

### COVID-19 country impact

Full lockdown commenced on 25 March in Australia, while, from 23 March, pubs, clubs, cafés and restaurants closed....

**Content removed from sample**

### Company response

The COVID-19 outbreak has not changed the fact that sales of consumer electronics continue to be dominated...

**Content removed from sample**

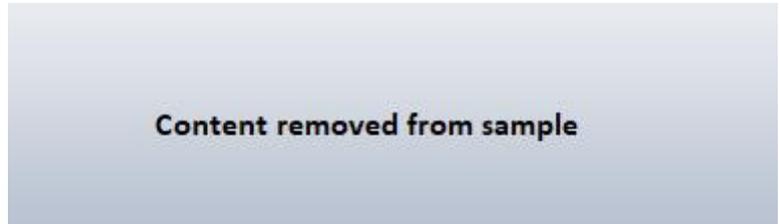
### Retailing shift

The COVID-19 outbreak has permanently shaped retailing of consumer electronics. Consumer behaviour...

**Content removed from sample**

### What next for consumer electronics?

Lowered consumer confidence in combination with a further drop in disposable income will continue to...



### MARKET DATA

Table 12 Sales of Consumer Electronics by Category: Volume 2015-2020

'000 units	2015	2016	2017	2018	2019	2020
Computers and Peripherals	<b>Data removed from sample</b>					
In-Car Entertainment						
In-Home Consumer Electronics						
Portable Consumer Electronics						
Consumer Electronics						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Consumer Electronics by Category: Value 2015-2020

AUD million	2015	2016	2017	2018	2019	2020
Computers and Peripherals	<b>Data removed from sample</b>					
In-Car Entertainment						
In-Home Consumer Electronics						
Portable Consumer Electronics						
Consumer Electronics						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Consumer Electronics by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Computers and Peripherals	<b>Data removed from sample</b>		
In-Car Entertainment			
In-Home Consumer Electronics			
Portable Consumer Electronics			

Consumer Electronics

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Consumer Electronics by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Computers and Peripherals	<b>Data removed from sample</b>		
In-Car Entertainment			
In-Home Consumer Electronics			
Portable Consumer Electronics			
Consumer Electronics			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 NBO Company Shares of Consumer Electronics: % Volume 2016-2020

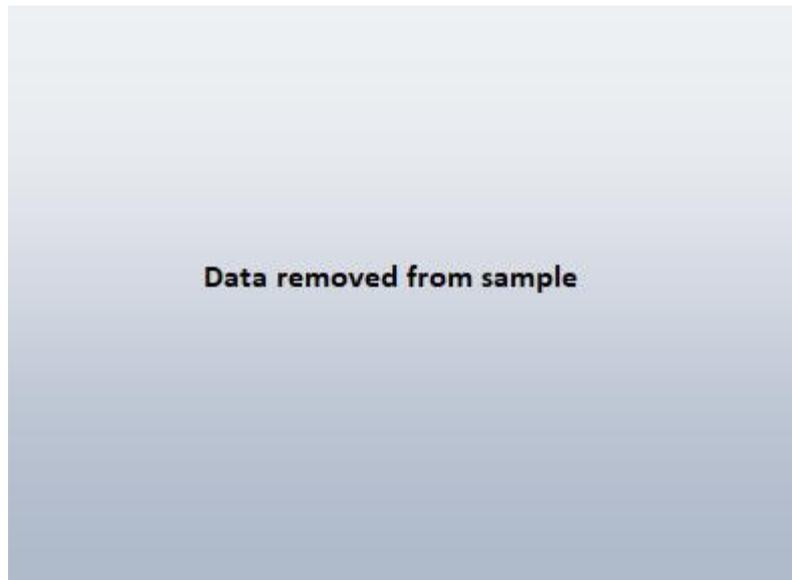
% retail volume Company	2016	2017	2018	2019	2020
<b>Data removed from sample</b>					

Others  
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 LBN Brand Shares of Consumer Electronics: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------	---------------	------	------	------	------



Others  
Total

Others  
Total

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 18** Distribution of Consumer Electronics by Channel: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Discounters						
-- Hypermarkets						
-- Supermarkets						
-- Other Grocery Retailers						
- Non-Grocery Specialists						
-- Electronics and Appliance Specialist Retailers						
-- Other Non-Grocery Specialists						
- Mixed Retailers						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- E-Commerce						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 19** Forecast Sales of Consumer Electronics by Category: Volume 2020-2025

'000 units	2020	2021	2022	2023	2024	2025

Computers and Peripherals  
 In-Car Entertainment  
 In-Home Consumer  
 Electronics  
 Portable Consumer  
 Electronics  
 Consumer Electronics

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 20 Forecast Sales of Consumer Electronics by Category: Value 2020-2025**

AUD million

	2020	2021	2022	2023	2024	2025
Computers and Peripherals In-Car Entertainment In-Home Consumer Electronics Portable Consumer Electronics Consumer Electronics	<b>Data removed from sample</b>					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 21 Forecast Sales of Consumer Electronics by Category: % Volume Growth 2020-2025**

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Computers and Peripherals In-Car Entertainment In-Home Consumer Electronics Portable Consumer Electronics Consumer Electronics	<b>Data removed from sample</b>		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 22 Forecast Sales of Consumer Electronics by Category: % Value Growth 2020-2025**

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Computers and Peripherals In-Car Entertainment In-Home Consumer Electronics Portable Consumer Electronics Consumer Electronics	<b>Data removed from sample</b>		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## DISCLAIMER

**Content removed from sample**

## GLOBAL MACROECONOMIC ENVIRONMENT

- The COVID-19 pandemic has forced governments to quarantine entire countries, disrupted global supply chains...

**Content removed from sample**

## GLOBAL INDUSTRY ENVIRONMENT

- The Coronavirus (COVID-19) pandemic has had an immediate and wide-ranging impact on sales of...

**Content removed from sample**

## SOURCES

Sources used during research include the following:

### Summary 1 Research Sources

Official Sources

[Redacted]

Trade Associations

[Redacted]

[Redacted]

**Content removed from sample**

[Redacted]

[Redacted]

Trade Press

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

Source: Euromonitor International