



# Passport

## Home Audio and Cinema in Australia

Euromonitor International

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# 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

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## 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...

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### Home cinema and speaker systems continues to grow

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

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### 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...

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## 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...

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

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

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Wireless speakers continues to take sales from bulky and outdated technology such as audio separates and hi-fi systems...

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## 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

**Data removed from sample**

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	<b>Data removed from sample</b>					
Digital Media Player						
Docks						
Hi-Fi Systems						
Home Cinema and Speaker						
Systems						
Speakers						
Other Home Audio and	<b>Data removed from sample</b>					
Cinema						
Home Audio and Cinema						

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	<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 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	<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 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
----------------------------	------	------	------	------	------

**Data removed from sample**

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
--------------------------------	---------------	------	------	------	------

**Data removed from sample**

Others  
Total

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

**Data removed from sample**

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

**Data removed from sample**

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

**Data removed from sample**

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...

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### COVID-19 country impact

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

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### Company response

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

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### Retailing shift

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

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## What next for consumer electronics?

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

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## 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	Data removed from sample		
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

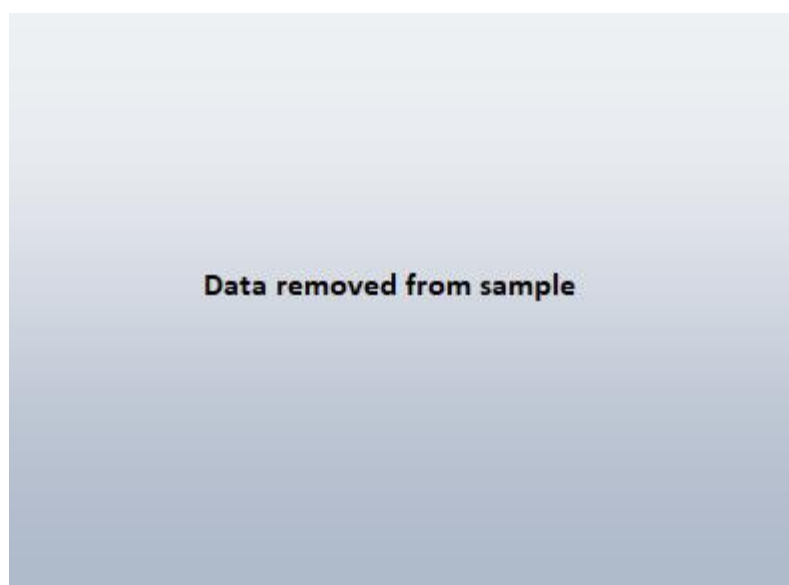
% retail volume	2016	2017	2018	2019	2020
Company	Data removed from sample				

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	Company (NBO)	2017	2018	2019	2020
Brand (GBO)					



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	Data removed from sample					
- 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	Data removed from sample					

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	Data removed from sample		

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	Data removed from sample		

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

## DISCLAIMER

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## GLOBAL MACROECONOMIC ENVIRONMENT

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

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## GLOBAL INDUSTRY ENVIRONMENT

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

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## SOURCES

Sources used during research include the following:

### Summary 1 Research Sources

#### Official Sources

#### Trade Associations

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Trade Press

Source: Euromonitor International