




Growth  
from  
Knowledge

# Connecting the Dots: How to meet Smart Consumers evolving expectations?

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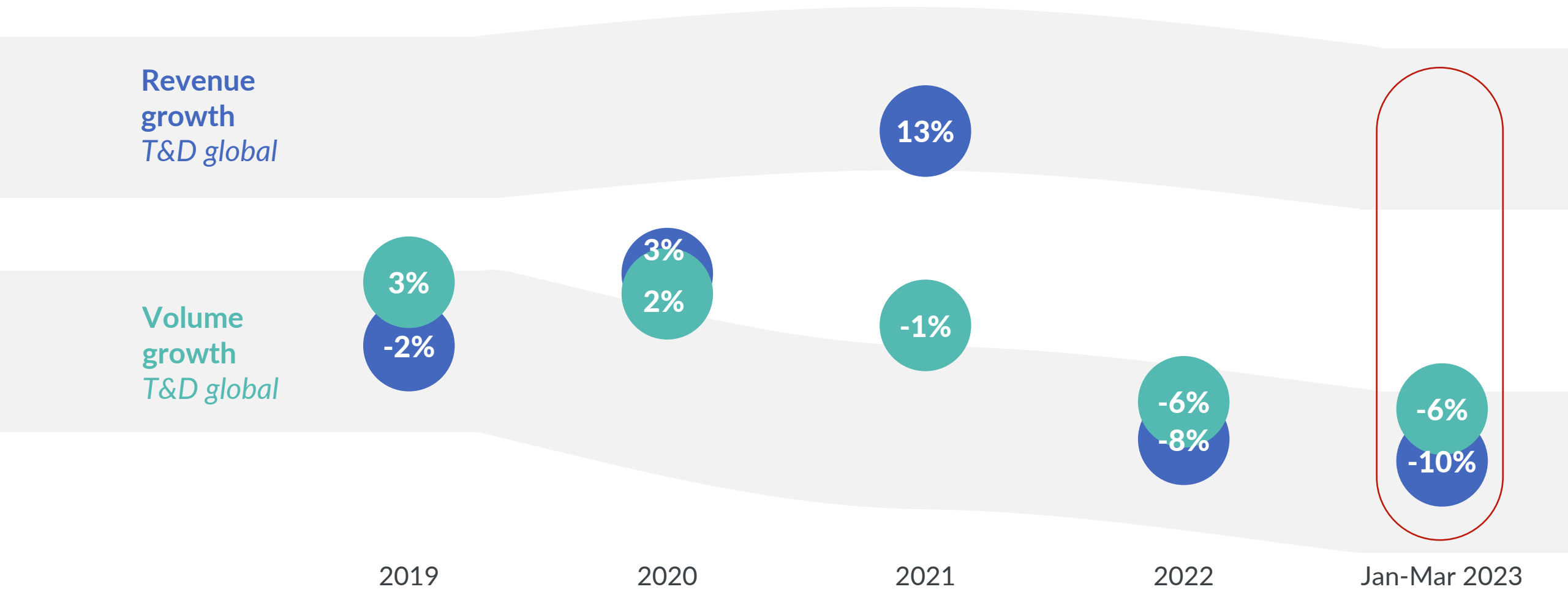




“It's in our best interest to **put some of the old rules aside and create new ones and follow the consumer** - what the consumer wants and where the consumer wants to go.”

- Bob Iger -

# Deceleration will slow down in 2023 after the pandemic storm

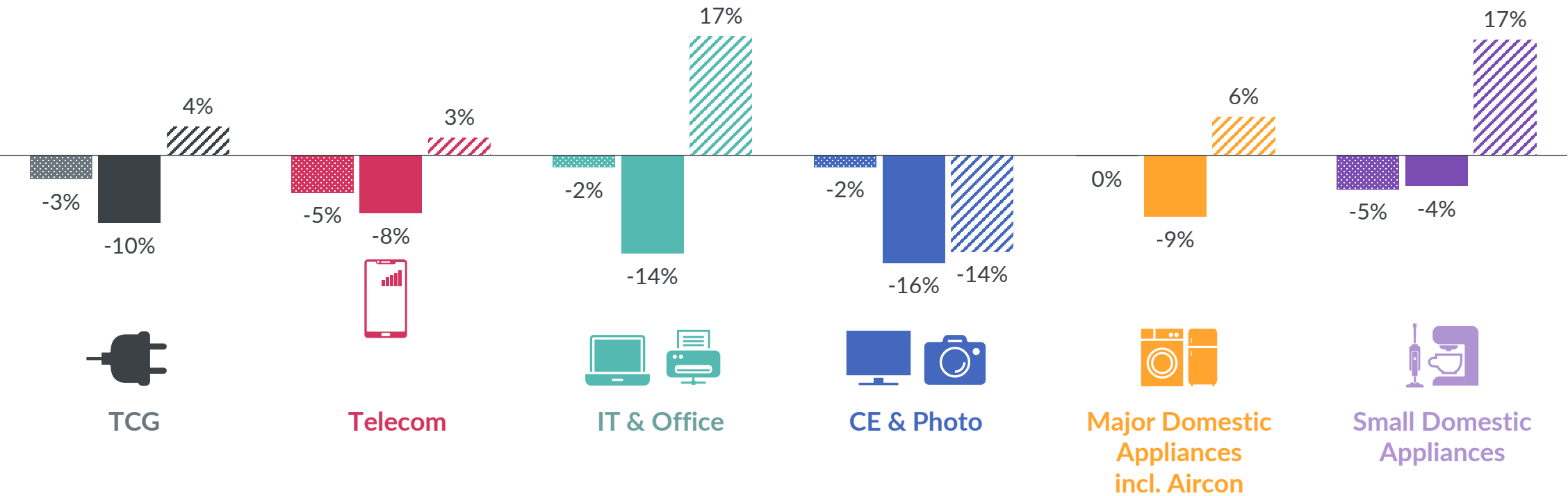


# TCG market is still above 2019 baselines, thanks to IT and SDA. CE/Photo remains relatively weak

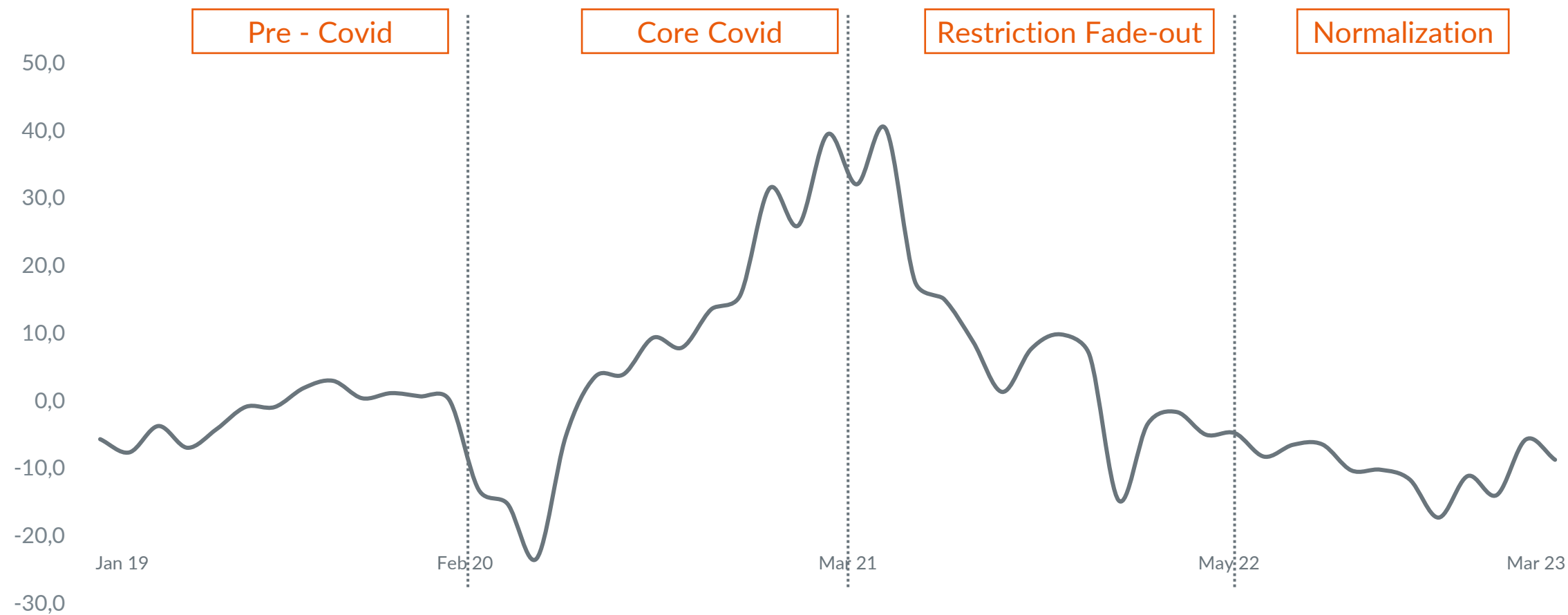


Sales value growth USD | Jan – March 2023

2022 vs. 2021    2023 vs. 2022    2023 vs. 2019

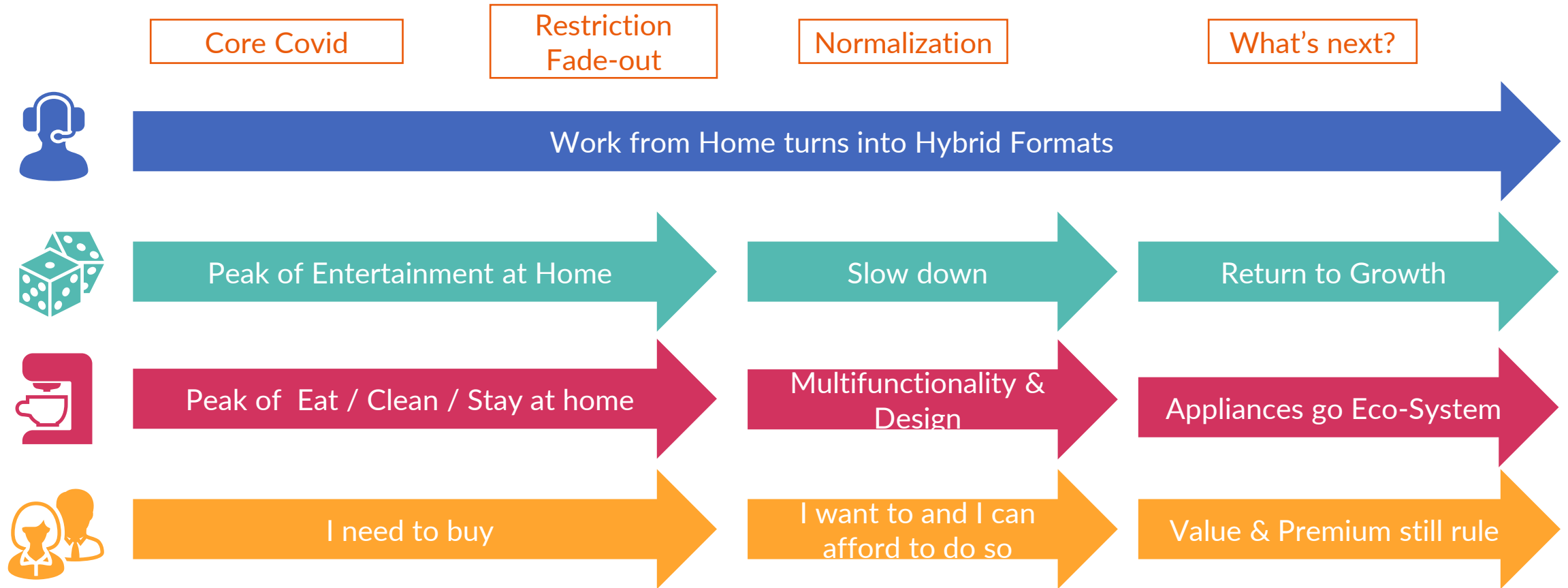


# Covid-19 tremendously impacted sales of Technical Consumer Goods



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What is coming next?



# Entertainment at Home

Gaming Markets reach the next level!



Gaming Markets declining after realizing tremendous growth in 2020 and 2021



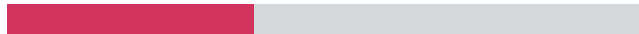
Gaming Markets with tremendous performance vs. 2019 across all PC Hardware and Accessories categories

# What has changed during Pandemic?

## Gaming has reached center of society



35%



**+0%** Female buyers for Gaming Mobile PCs  
(35% in 2021 compared to 35% in 2019)

58%



**+6%** of buyers for Gaming Consoles employed full-time  
(58% in 2021 compared to 52% in 2019)

54%



**+ 1%** of buyers for Gaming Mobile PCs employed full-time  
(54% in 2021 compared to 53% in 2019)

# What might be next? Gaming is expanding further with new solutions for everyone



# Work@Home

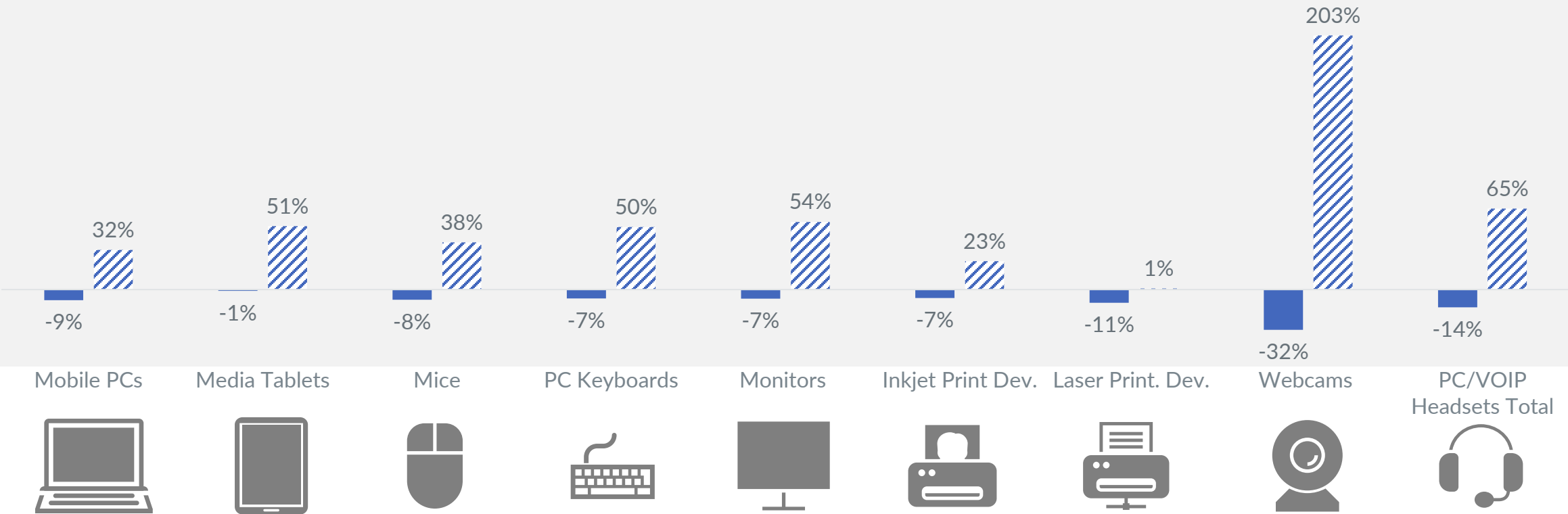
Hybrid Models are here to stay

# Home Office products stay on high level compared to 2019 and will provide future potential as soon as replacement cycle kicks in

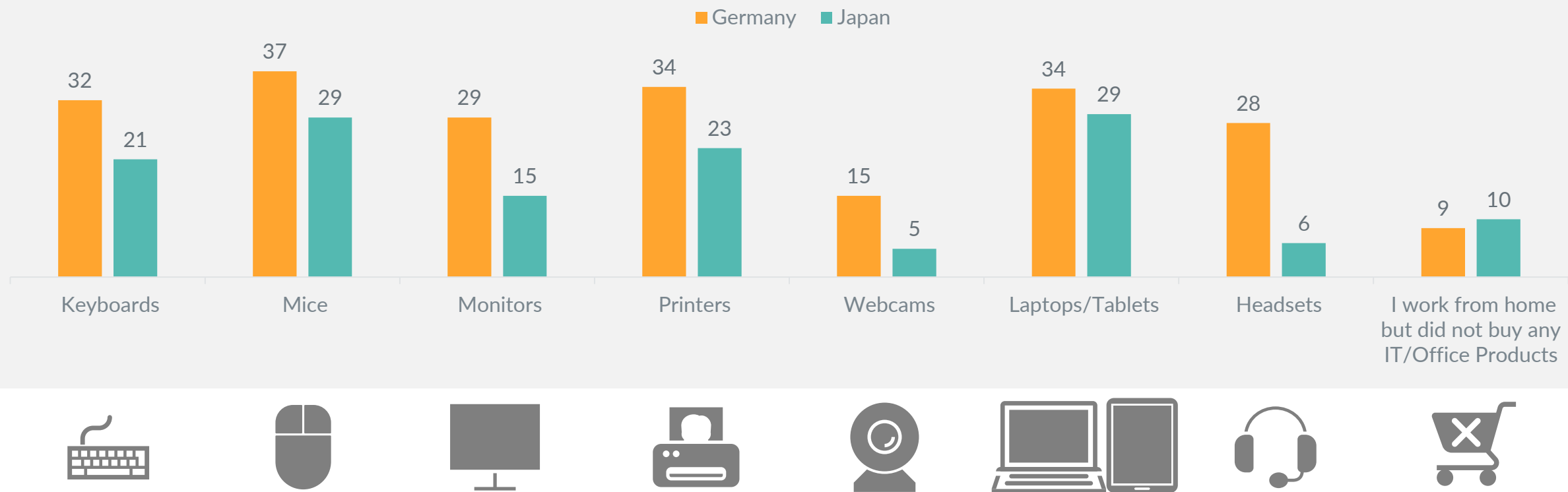


USD value growth % | 2022 vs 2021 resp. 2022 vs. 2019 | Jan - Dec

2022 vs. 2021    2022 vs. 2019



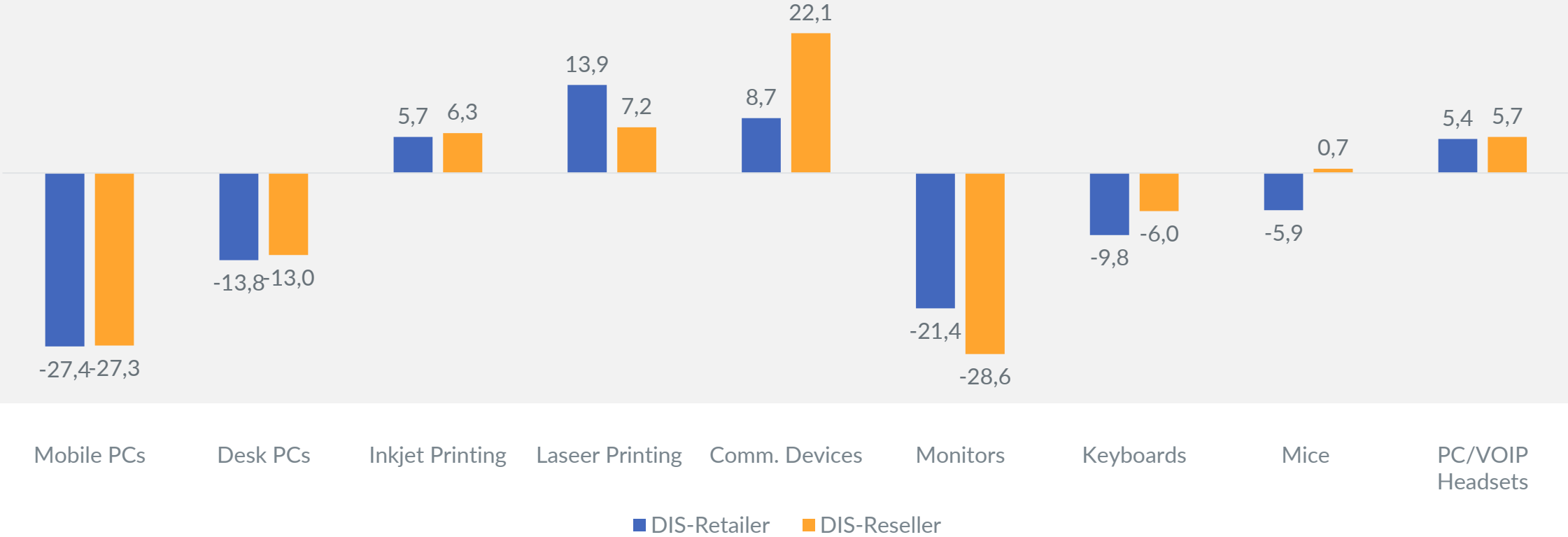
# Majority of employees working from Home was investing in IT infrastructure – which is a good sign for upcoming replacement cycles



# B2B vs. B2C Distribution Sales start with a mixed picture into 2023



EUR value growth % | Week 1 – Week 23 | 2023 vs. 2022



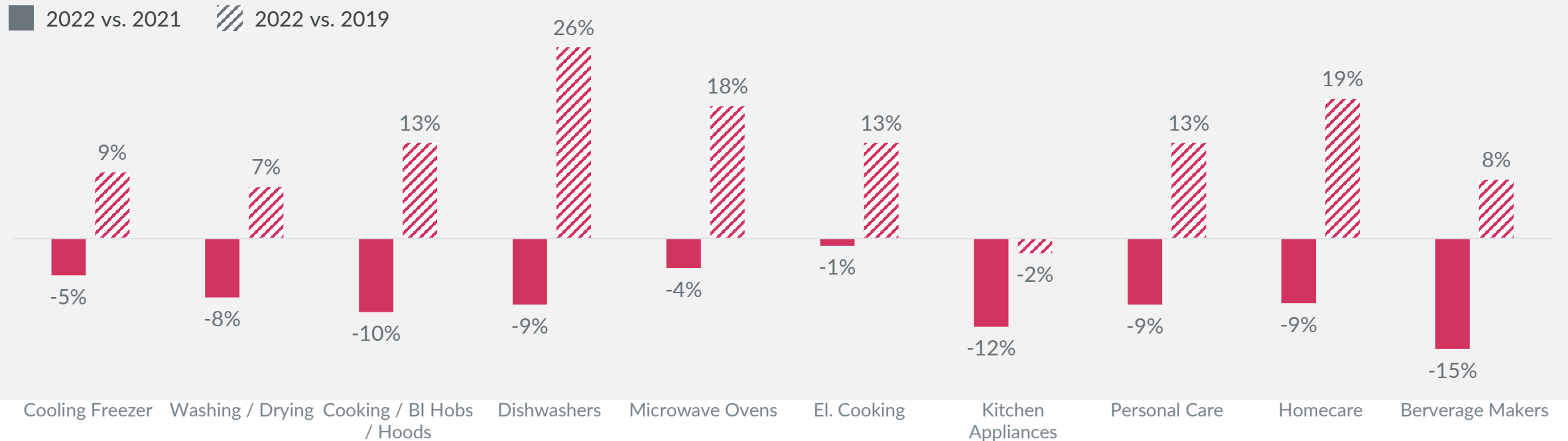
# Stay@Home

Appliances go Ecosystem

# Appliances show deceleration as Stay@Home Trends also face saturation



USD value growth % | 2022 vs 2021 resp. 2022 vs. 2019 | Jan - Dec



# Simplification and Sustainability features accelerate Appliances Markets



## Health & Hygiene

## Hot Air Fryers



**+75%**

## Sustainability

## Washing Machines (A)

## Cooling (C)



**+61%**

**+45%**

## Connectivity

## Smart / Voice Control (MDA)

## Smart Cooling (BIBU)



**+14%**

**+6%**

**“Household appliances:  
connectivity is essential to  
optimize energy savings”**

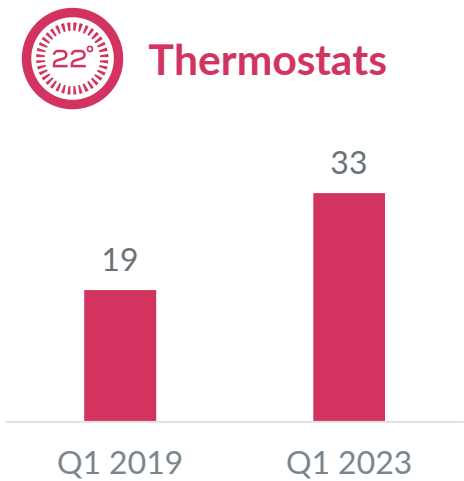
# Smart devices cater to basic practical and safety needs.



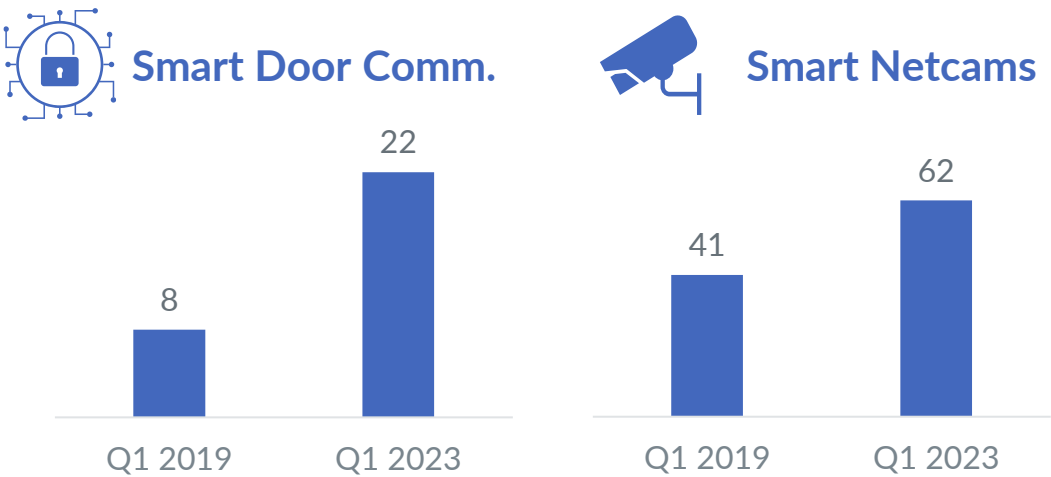
## Most important smart home use cases for consumers



## Energy optimization



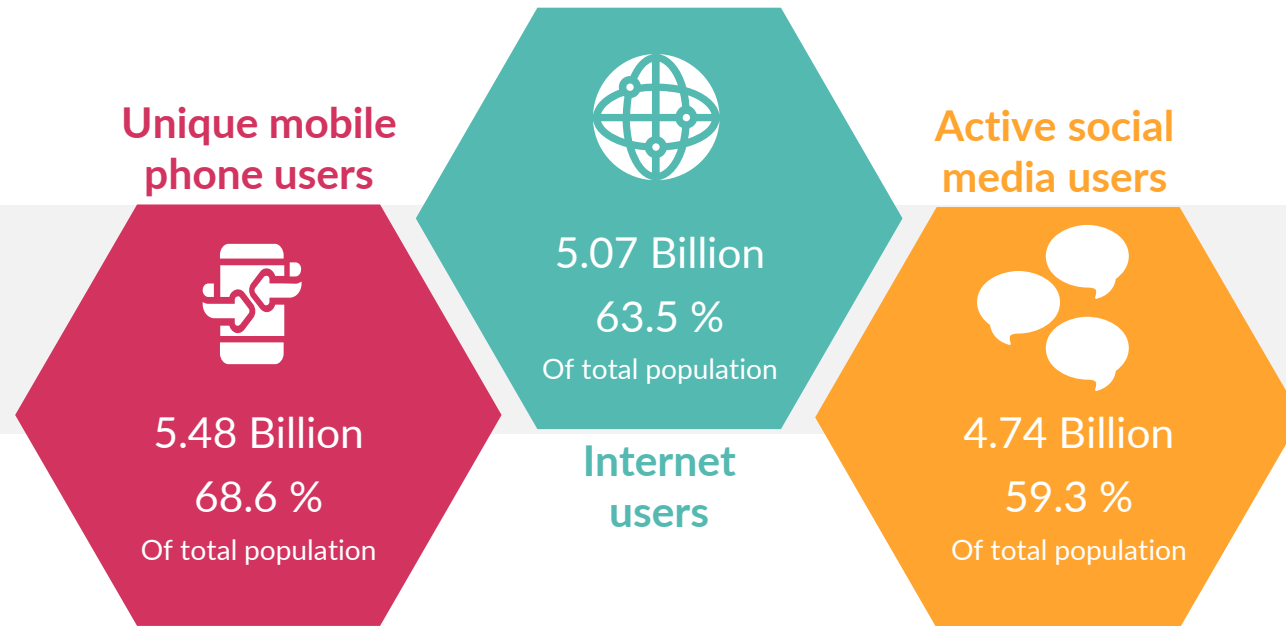
## Home monitoring



## Transformation of Behavior:

Consumers are smarter than ever

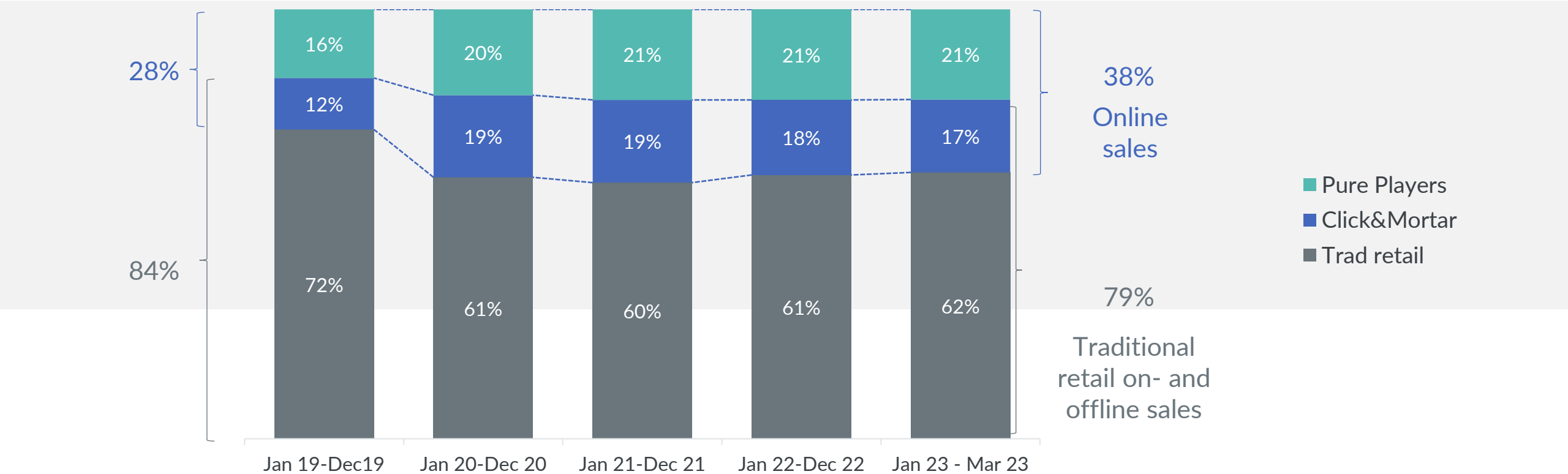
# Covid 19 led dramatic changes impacting digital behaviors too...



# E-commerce (in particular Click & Mortar) growth slows down compared to the high levels in previous years



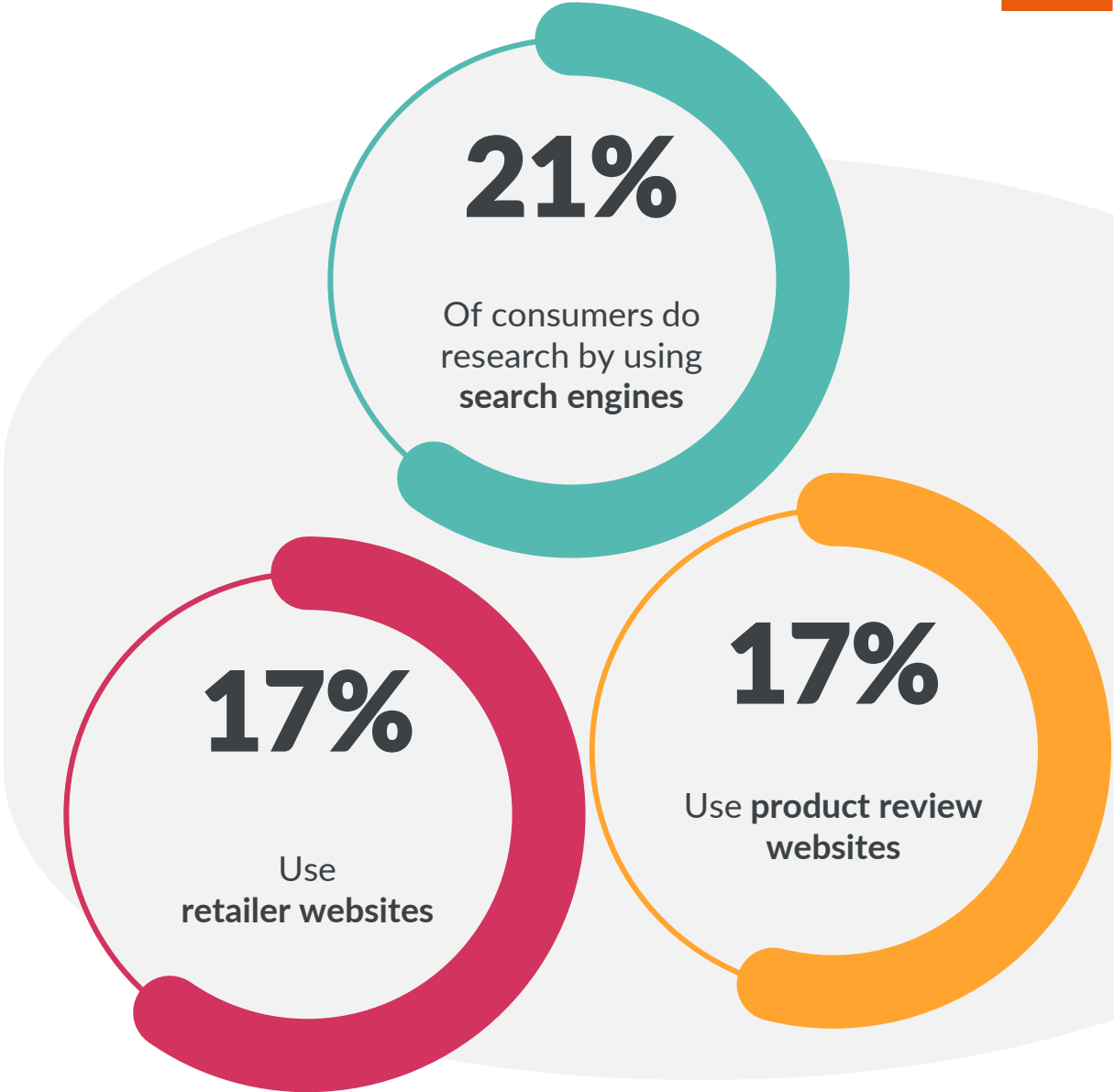
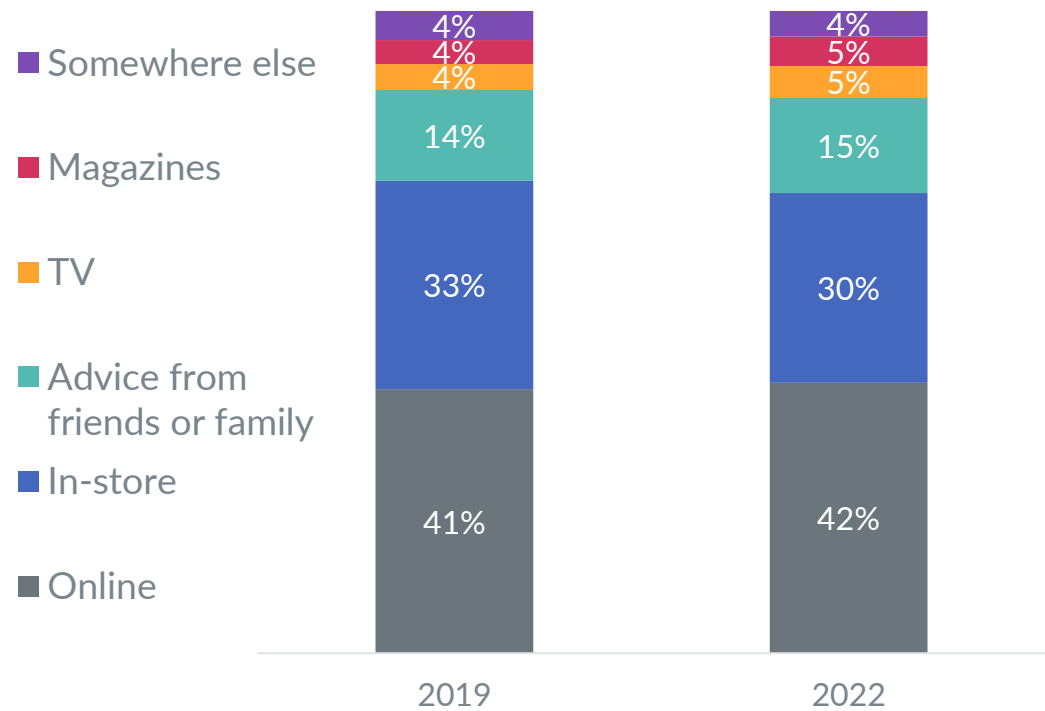
 Europe | Sales EUR%



# Know where smart consumers look for information



Research Channels



## Transformation of Behavior:

Consumers adapt their purchase behavior



# Most consumers are doing something to save money



85%

Of global consumers have attempted at least one money-saving initiative in the past year

48%

Of consumers postponed a purchase until the product was on sale/special offer

35%

Of consumers switched from named brands to less expensive brands

# Consumers adapt their behavior: Novelty is out...



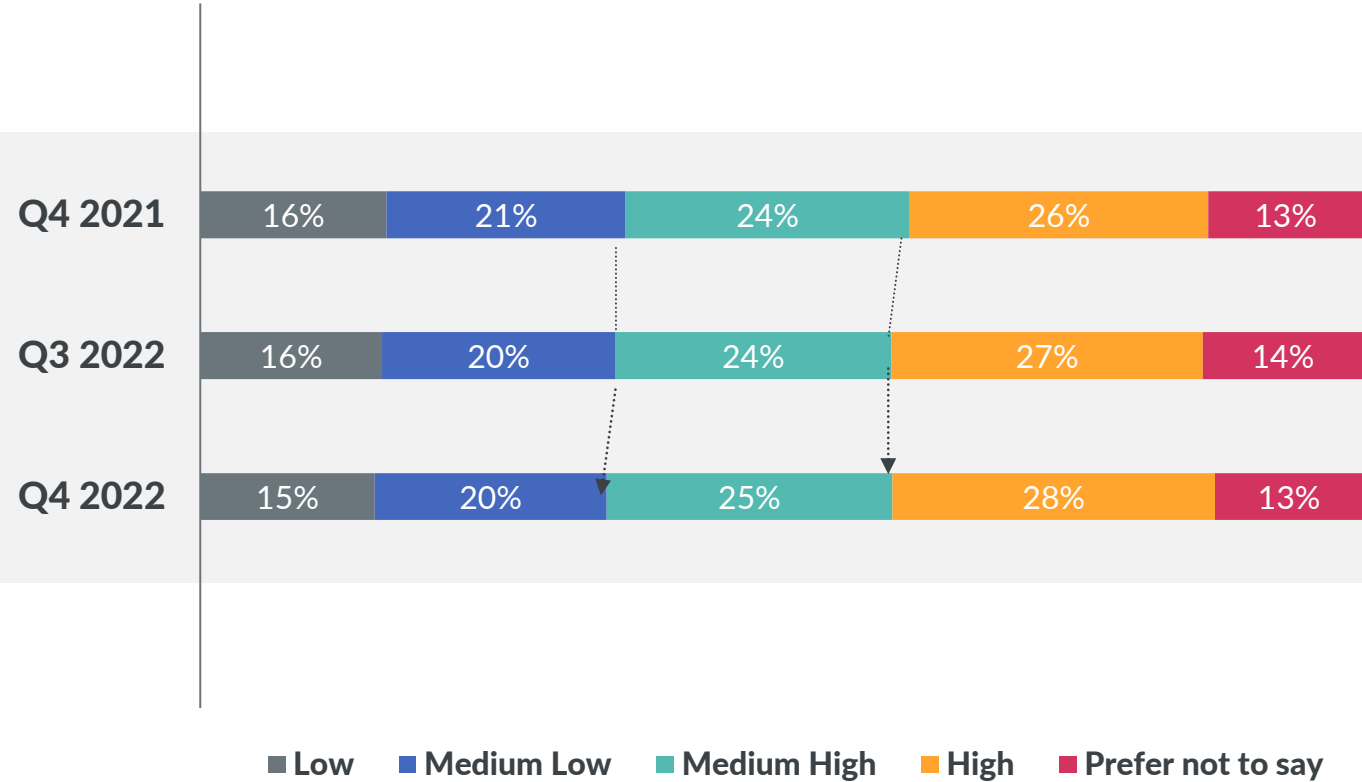
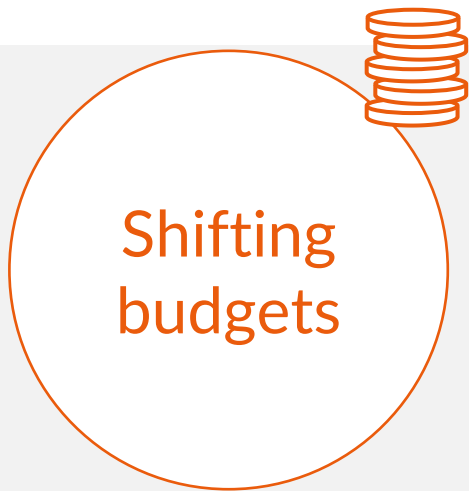
“I'm always on the **lookout**  
**for new products** and services”

## ... but Value still rules

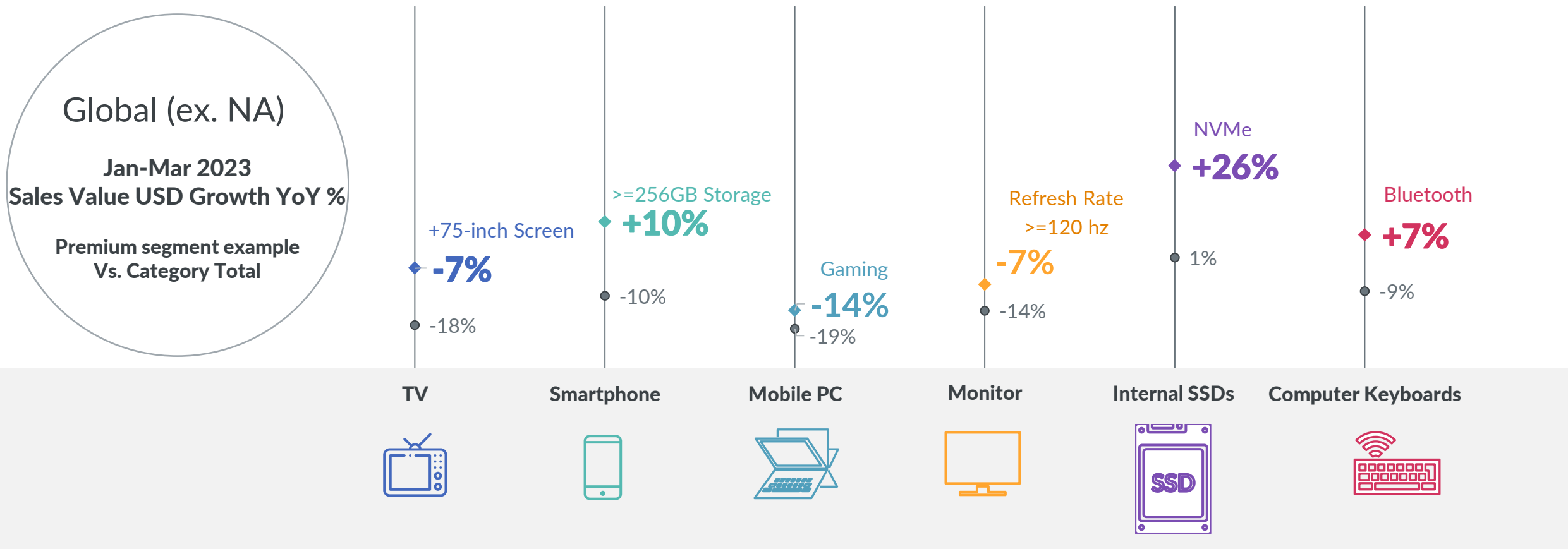


“I prefer to **own fewer but higher quality items** (clothes, technology products, etc.)”

# The share of tech and durables purchases in high income buyers has increased – supporting premium markets

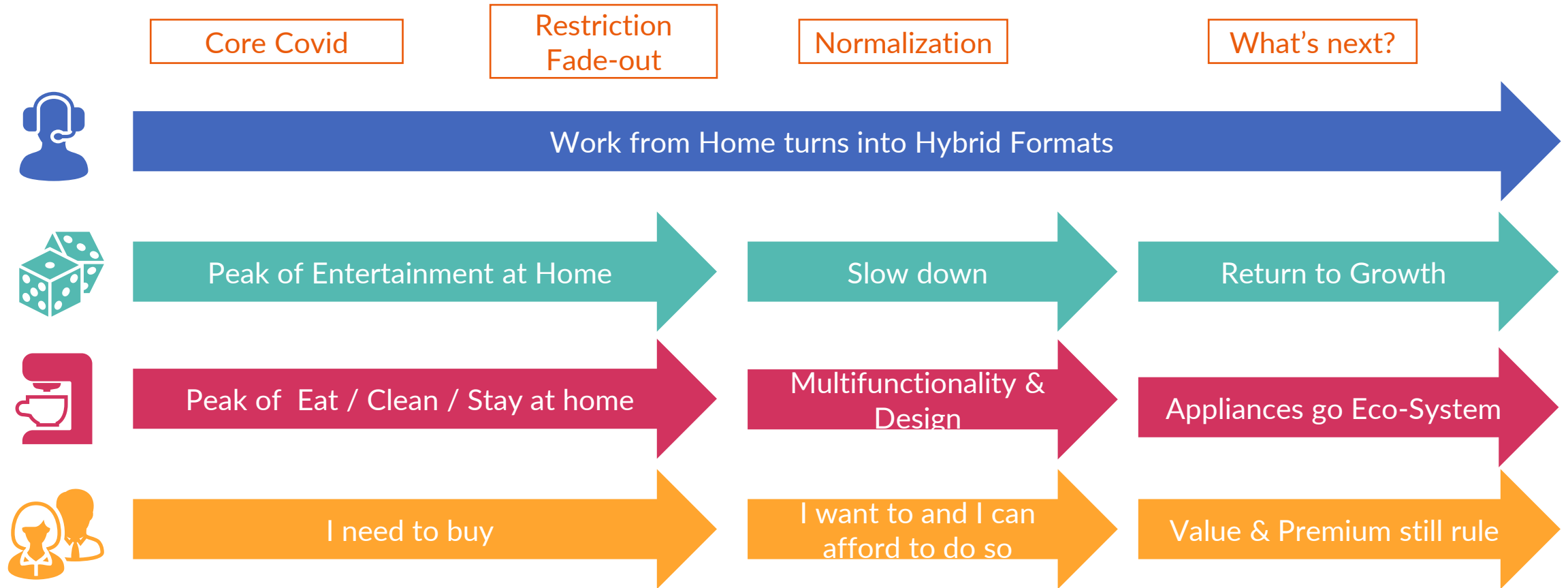


# Select premium feature sales increased more than category average



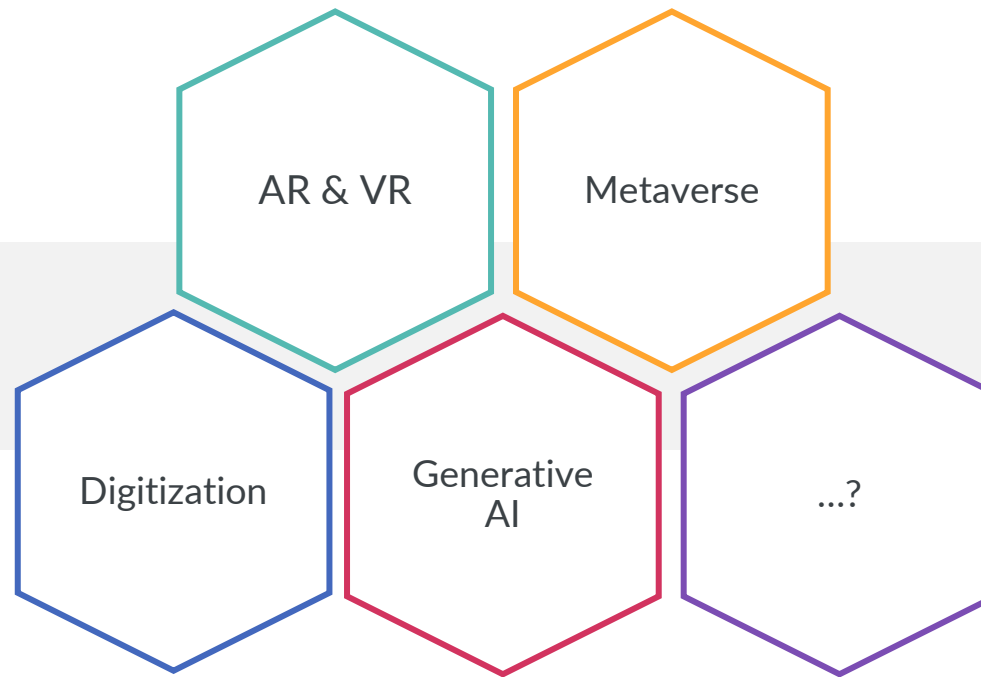
# Covid-19 tremendously impacted sales of Technical Consumer Goods

What is coming next?



**What might be next?**

# Of course, the transformation does not stop here...



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# Thank you

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