SONOS PRODUCT PERFORMANCE DATA

Period: January - October 2024

UNIT SALES BY PRODUCT

SOUNDBARS

Sonos Arc: 24,580 units (+18% YoY)

- Avg selling price: $849 (discounts during promo periods)

- Attach rate with Sub: 35%

- Attach rate with Era 300 surrounds: 22%

- Return rate: 2.1%

- NPS: 74

Sonos Beam (Gen 2): 32,145 units (+12% YoY)

- Avg selling price: $479

- Attach rate with Sub Mini: 28%

- Attach rate with One surrounds: 18%

- Return rate: 2.8%

- NPS: 71

Sonos Ray: 18,920 units (+8% YoY)

- Avg selling price: $269

- Multi-room add-on rate: 12%

- Return rate: 3.5%

- NPS: 68

SMART SPEAKERS

Sonos Era 100: 38,670 units (NEW 2024)

- Avg selling price: $239

- Stereo pair rate: 42%

- Multi-room expansion: 58%

- Return rate: 2.2%

- NPS: 73

Sonos Era 300: 12,480 units (NEW 2024)

- Avg selling price: $439

- Stereo pair rate: 18%

- Attach with Sub: 12%

- Return rate: 3.1%

- NPS: 76

Sonos One (Gen 2): 21,350 units (-15% YoY, cannibalized by Era 100)

- Avg selling price: $209

- Stereo pair rate: 48%

- Return rate: 2.5%

- NPS: 70

PORTABLE SPEAKERS

Sonos Move 2: 15,840 units (NEW 2024, launched June)

- Avg selling price: $439

- Additional Roam purchase: 15%

- Return rate: 3.8%

- NPS: 72

Sonos Roam: 29,560 units (+25% YoY)

- Avg selling price: $169

- Wireless charger attach: 35%

- Return rate: 4.2%

- NPS: 69

BASS & AMPS

Sonos Sub (Gen 3): 9,240 units (+14% YoY)

- Avg selling price: $779

- 85% attach to Arc/Beam

- Return rate: 1.8%

- NPS: 77

Sonos Sub Mini: 7,680 units (+22% YoY)

- Avg selling price: $419

- 75% attach to Ray/Beam

- Return rate: 2.4%

- NPS: 73

Sonos Amp: 4,120 units (+5% YoY)

- Avg selling price: $689

- Custom install: 62%

- Return rate: 2.1%

- NPS: 75

Sonos Port: 1,890 units (-8% YoY)

- Avg selling price: $439

- Audiophile market: 78%

- Return rate: 1.9%

- NPS: 72

ACCESSORIES

Wall Mount for Arc: 6,140 units

Wall Mount for One: 4,280 units

Roam Wireless Charger: 10,350 units

REGIONAL PERFORMANCE

North America: 125,480 units (58%)

- Strong Arc and Beam sales

- Era 100 exceeding expectations

- Roam popular gift item

Europe: 65,240 units (30%)

- Era 300 over-indexing (spatial audio adoption)

- Strong portable speaker sales

- Premium products performing well

APAC: 20,850 units (10%)

- Compact speakers preferred (Era 100, Beam)

- Growing market, high growth potential

- Price sensitivity higher

Latin America: 4,095 units (2%)

- Emerging market

- Entry products performing best

CHANNEL PERFORMANCE

Direct (Sonos.com): 32% of revenue

- Highest AOV: $687

- Bundle penetration: 28%

- Email marketing driving 42%

Retail Partners: 45% of revenue

- Best Buy: 18% of total revenue

- Target: 12%

- Apple Stores: 9%

- Other: 6%

E-commerce (Amazon, etc.): 23% of revenue

- Amazon: 15% of total revenue

- Strong Prime Day performance

- Review ratings driving sales

SEASONAL TRENDS

Q1 (Jan-Mar): 48,250 units

- New Year upgrades

- Tax refund season

- Era 100 launch impact

Q2 (Apr-Jun): 52,680 units

- Mother's/Father's Day

- Move 2 launch (June)

- Spring home refresh

Q3 (Jul-Sep): 58,920 units

- Prime Day spike

- Back to school

- Arc Upgrade Promo (2025)

Q4 (Oct-Dec): Projected 71,500 units

- Black Friday/Cyber Monday

- Holiday gifting

- Roam expected to lead

PRODUCT INSIGHTS

Top Performers:

1. Era 100 - Exceeded forecast by 22%

2. Roam - Gift giving and portability resonating

3. Arc - Premium segment growing

Opportunities:

1. Sub Mini - Under-penetrated, increase bundling

2. Era 300 - Educate on spatial audio benefits

3. Move 2 - Seasonal marketing (summer 2025)

Challenges:

1. Ray - Competing with Beam value perception

2. Port - Niche product, limited growth

3. One - Being phased out by Era 100

COMPETITIVE LANDSCAPE

Market Share (Premium Audio):

Sonos: 24% (+2 pts YoY)

Bose: 22% (-1 pt)

Apple: 18% (+1 pt)

Samsung: 15% (+1 pt)

Others: 21% (-3 pts)

Win Rates vs. Competitors:

vs. Bose: 58% (sound quality, ecosystem)

vs. Apple: 52% (platform flexibility)

vs. Samsung: 67% (music listening experience)

vs. Amazon/Google: 73% (audio quality)

CUSTOMER SATISFACTION

Overall NPS: 72 (industry leading)

Repeat purchase rate: 47%

Referral rate: 31%

Average products per household: 3.2

Customer lifetime value: $1,847

Top Satisfaction Drivers:

1. Sound quality

2. Ease of use

3. Ecosystem flexibility

4. App experience

5. Multi-room capability

Top Dissatisfaction Drivers:

1. Price (premium positioning)

2. Limited voice assistant (no Siri)

3. Bluetooth latency (specific use cases)

4. Occasional software bugs

FORECAST

Q4 2024 Projected: 71,500 units

Full Year 2024: 231,000 units (+15% YoY)

2025 Target: 275,000 units (+19% YoY)

Growth Drivers:

- Era lineup maturation

- Spatial audio adoption

- International expansion

- Ecosystem expansion per household

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