Winning @ Retail & Online

Logitech Analyst & Investor Day

Greg Rhine

11 March 2015

Forward Looking Statements

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Winning @ Retail & Online

great products

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global reach

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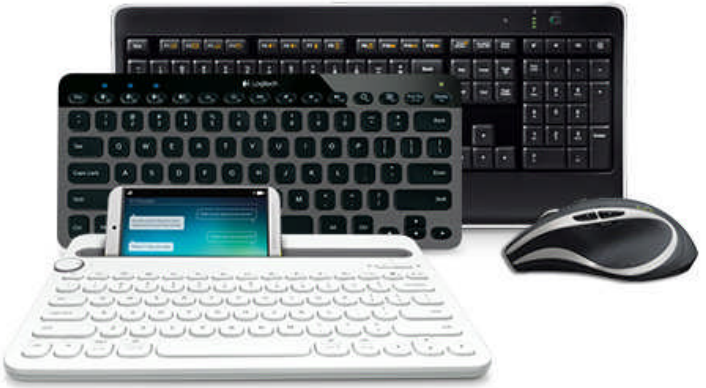
retail execution



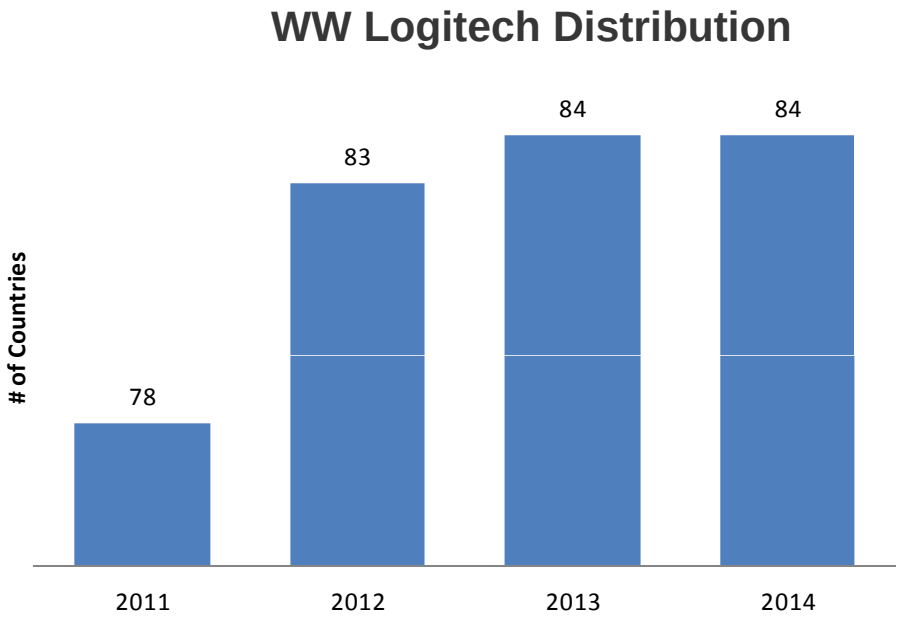
great products

☑ global reach

Global Retail Reach

Unparalleled global retail presence in virtually every major CE and online retailer around the world

Our Global Retail Footprint is a Powerful Asset

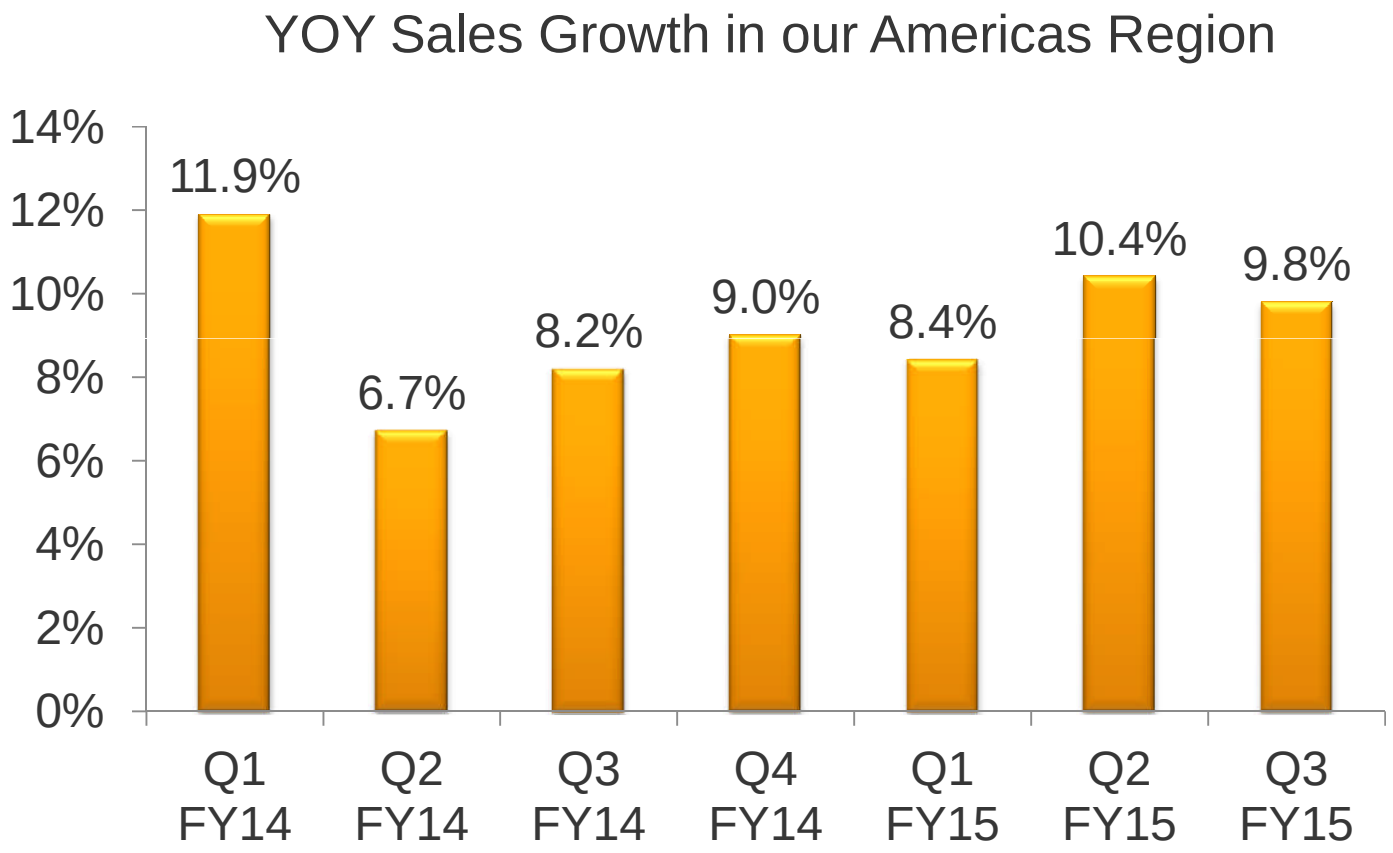


Top 10 Countries

1	United States
2	Germany
3	China
4	Canada
5	France
6	Australia
7	United Kingdom
8	Japan
9	Russian Federation
10	Switzerland

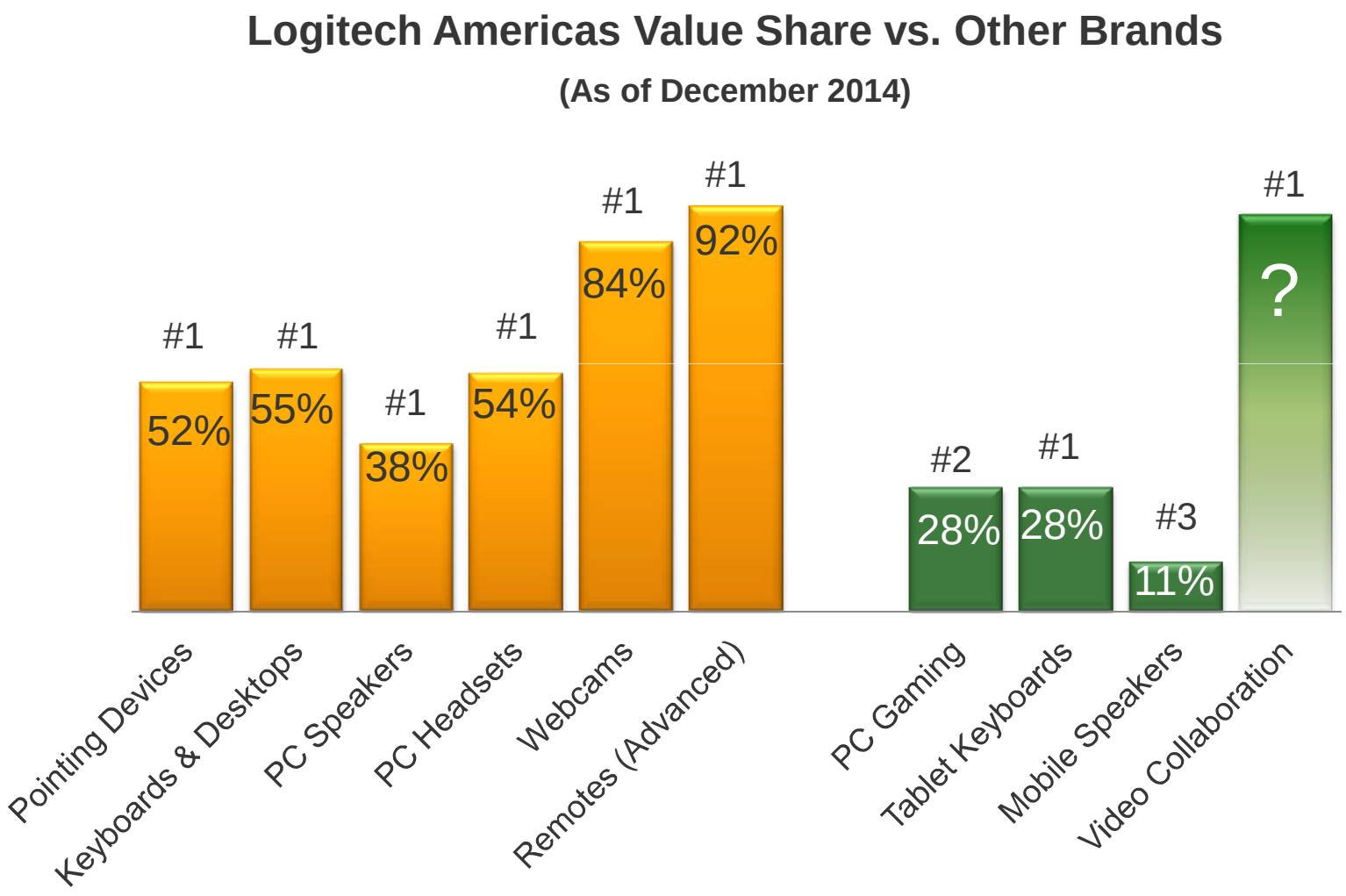
Source Logitech

Consistent Sales Growth in Americas



Source: Logitech Net Sales

Leading Market Share in Most Categories in the U.S



Source: NPD Retail December 2014, excluding Video Collaboration

retail execution

Data Driven Category Leadership

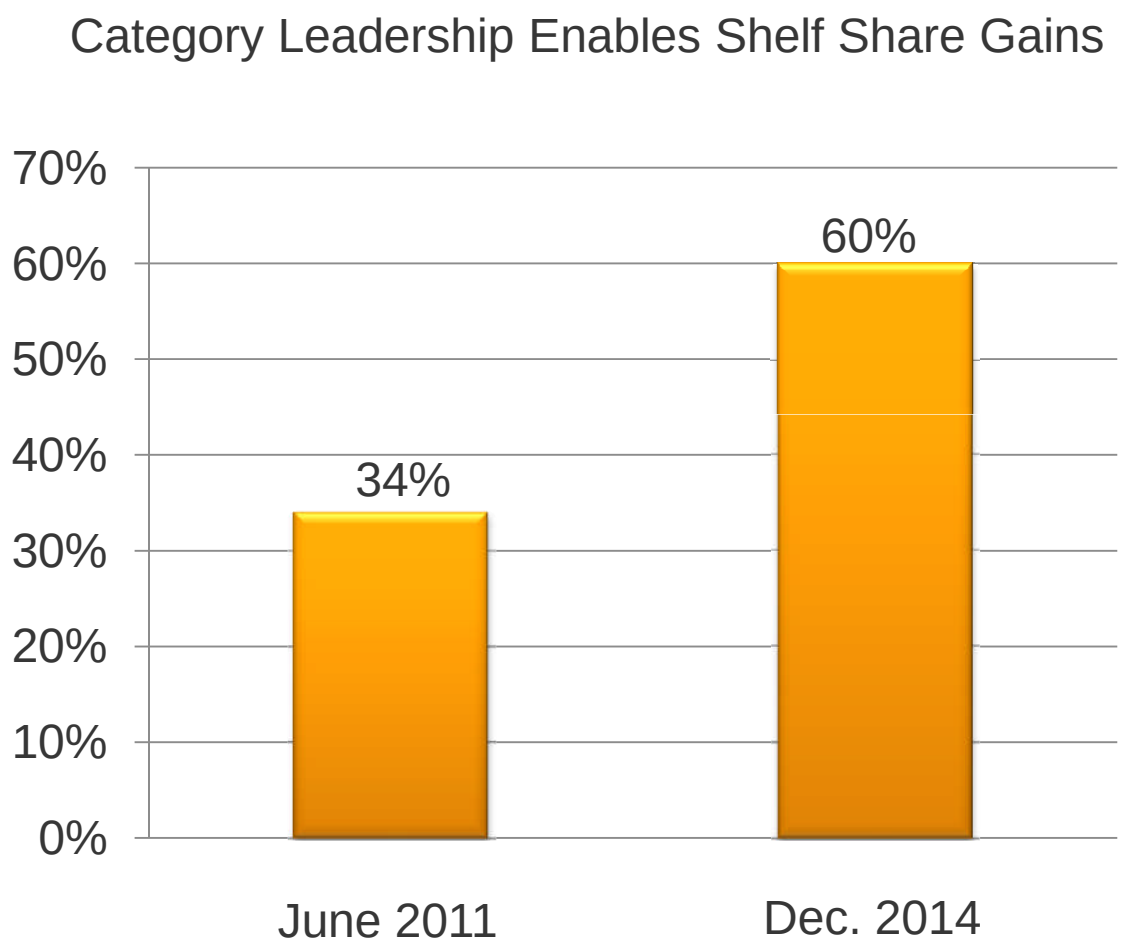
- Using research and data to advise retail and on-line partners to maximize effectiveness through:

- Shelf assortment
- Merchandising
- Promotional strategy
- Online strategy
- Marketing vehicles
- Return on investment

Disciplined Focus on Retail Success

- Obtain key **placement** in key retail stores
- Develop in-store **merchandising** and product launch displays to engage and educate the consumer that are as impressive as our products
- Expand and grow **shelf space**
- Work with retailers to develop the proper platform **adjacency** for our categories
- Cultivate valuable **strategic relationships** with our retail partners and jointly plan and category manage
- Create and launch rich and useful online content and **web assets** that inform, sell, and support

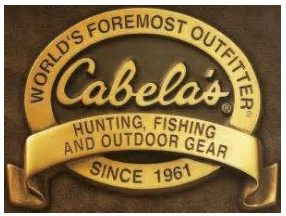
Significant Growth in US Shelf Share



Logitech Data: Combined Best Buy, Staples, Walmart, and Office Depot & Max and includes all major product categories

Great Products Open Doors to New Distribution Partners

Telco, Airport, Outdoor, Sporting and Department Stores

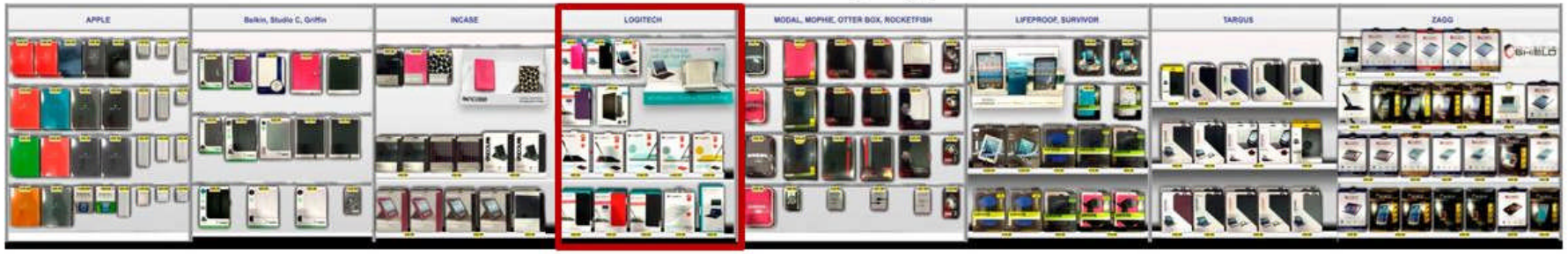


Develop, Test and Validate In-Store Layouts

Through shopper research, we are a leader in understanding how accessories are shopped by consumers.

Ongoing research identifies optimal aisle arrangements and product layouts.

Test 1 – Accessory Type

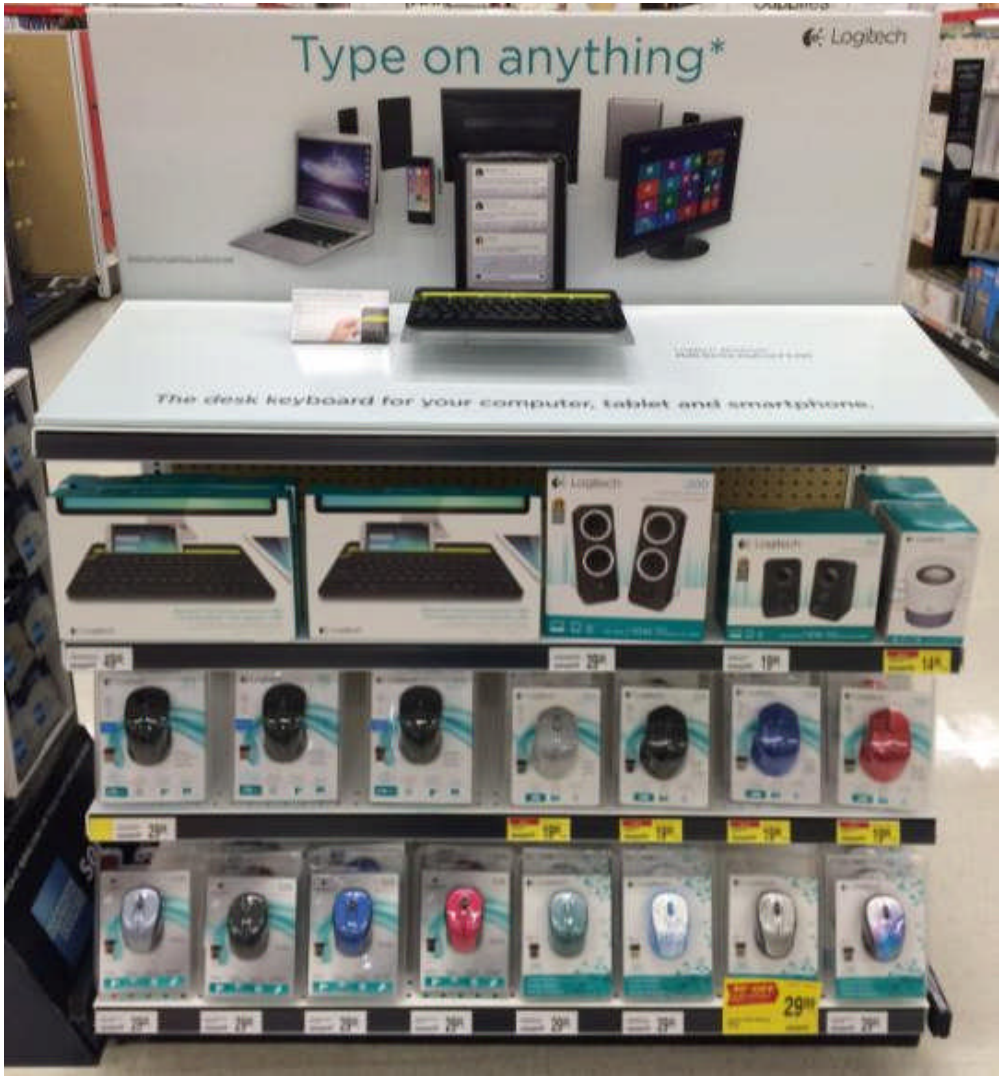


Test 2 – Accessory Brand

Our Research Enables Category Leading Merchandising

Merchandising Tablet Keyboards & Covers

Product Launch and Seasonal Merchandising



Store-in-Store Merchandising
UE Boom

In-Store Theatre Concept
UE Boom

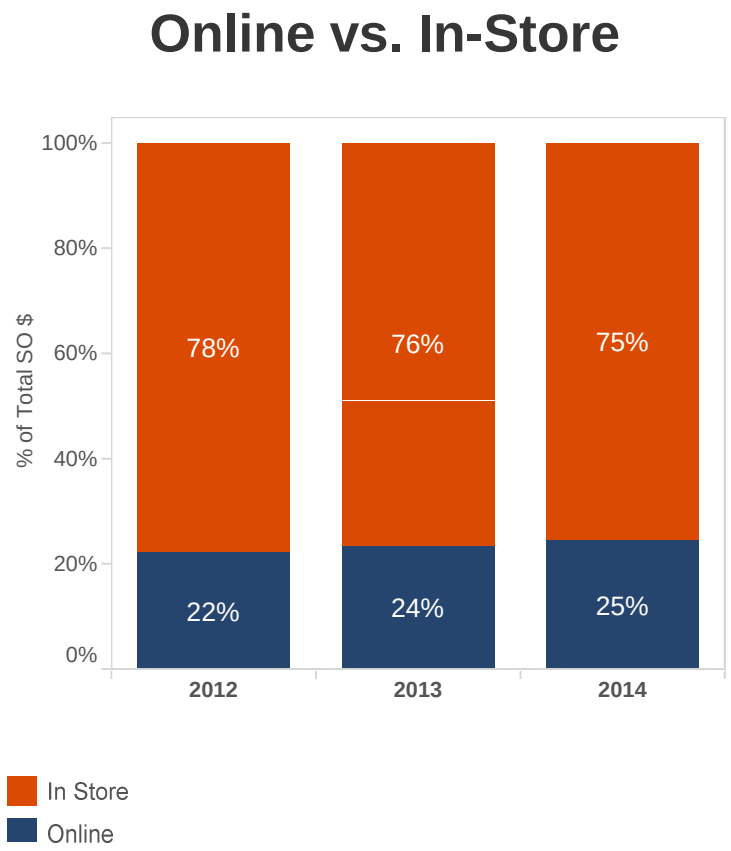
Leveraging Partnerships to Create Adjacency to TVs with Our Living Room Keyboard

Strategic Relationships Help Drive Sales

We create additional support through sales associate trainings.

In US alone, we trained over 34,000 associates last year.

WW Logitech Sell-Through



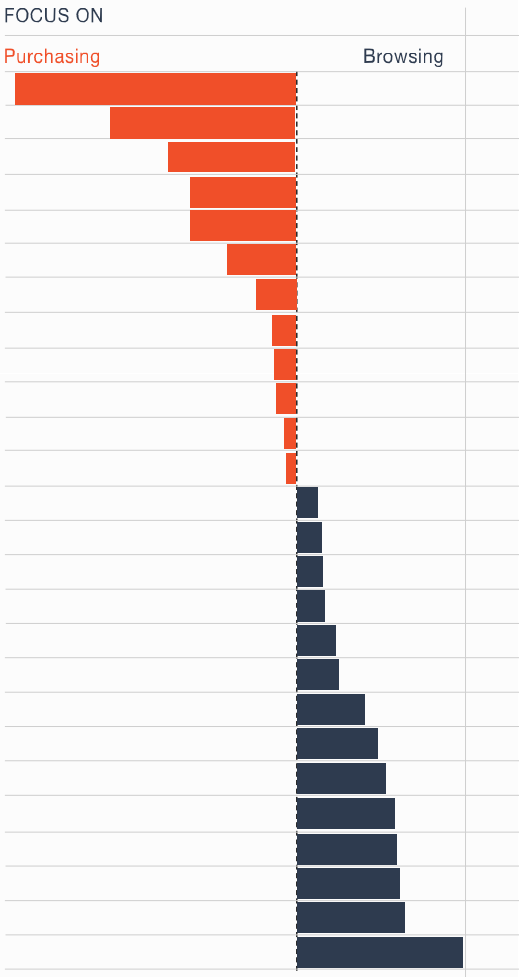
- Focused operationally on supporting both in-store and online sales
  - Separate, specialized teams
  - Apply research, testing and validation

Source Logitech Internal POS

Most Consumers Browse and Research Our Categories Online

Ensuring a Strong Online Presence & Identity Are Critical

ONLINE BEHAVIOR	Browsing (*)	Purchasing
Food and non-alcoholic beverages	21%	64%
Wine, spirits, & alcohol	22%	51%
Household products	37%	57%
Stationery	36%	52%
Health & medicine	34%	50%
Cosmetics and personal care	45%	55%
Baby care products	51%	57%
Fashion	54%	58%
Books, magazines	60%	63%
Luxury goods	56%	60%
Music, audio books	79%	80%
Gifts	61%	62%
Sporting goods	60%	57%
Games and toys	65%	62%
Furniture and home decoration	51%	47%
Software, video games & eBooks	85%	81%
Real estate	49%	43%
Movies	72%	65%
Tickets	72%	62%
Home technology	75%	62%
Personal finance	66%	52%
Portable technology	79%	64%
Computer hardware	78%	63%
Mobile phones and services	70%	55%
Travel and holiday	79%	63%
Automotive	62%	36%



*Perform 50% or more of browsing online

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Using Research to Develop Content for Strategic Retail Partners

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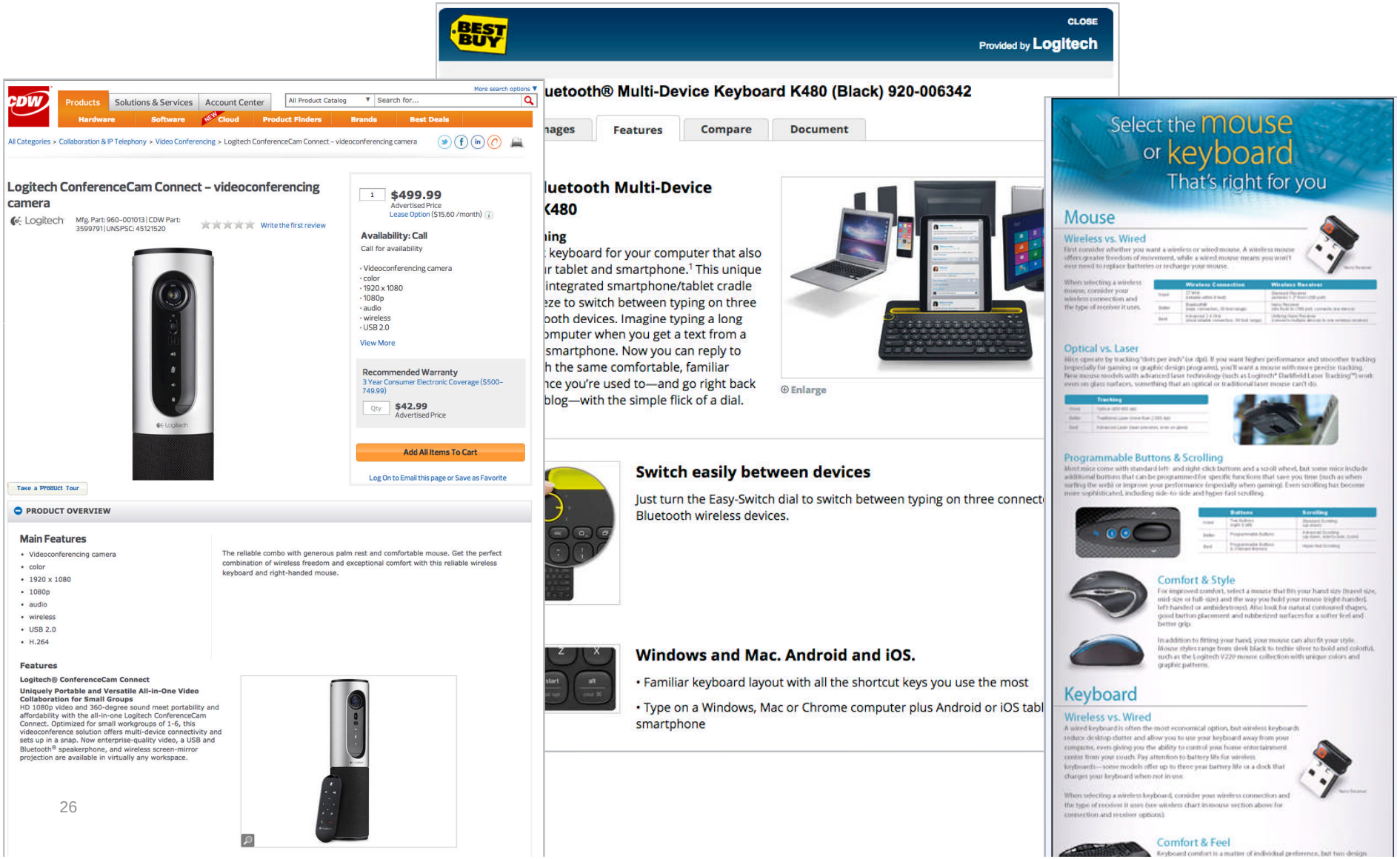
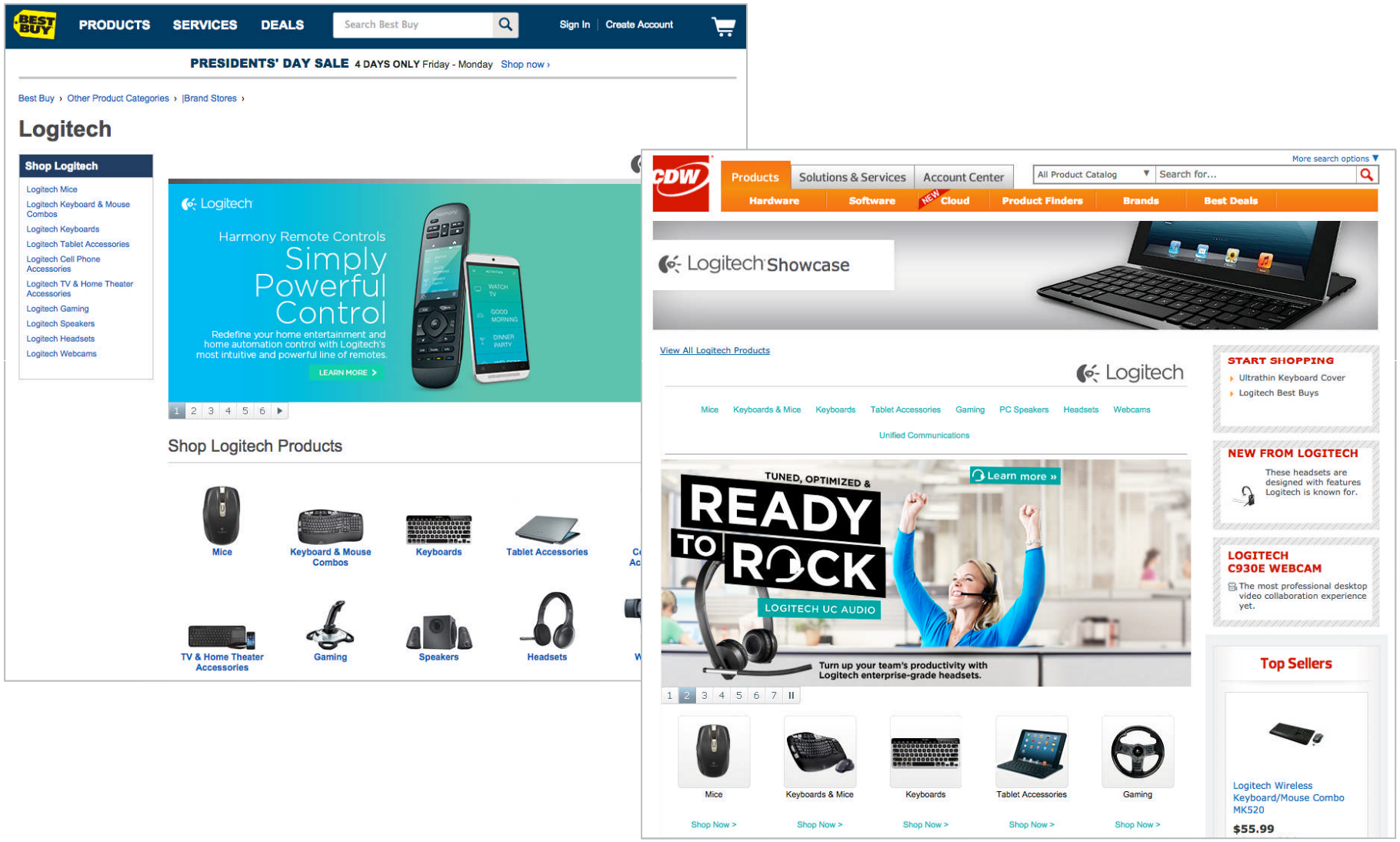
Heat maps assist with targeting and prioritizing content

Our Rich Online Content Supports Product Selection and Sales



We Create and Build Dedicated Online Brand Stores



Next Evolution in Retail…Multi-Channel

66% of consumers research online but validate their purchases in-store.
Multi-channel combines best of retailers' online and in-store assets.

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Multi-Channel is Emerging as the Best In-Store & Online Shopping Experiences Combined

- Historically, in-store and online experiences were separate
  - Online provides: depth, details, product research, rich content, and reviews
  - In store provides: tangible experience, impulse, and assisted sales
- Multi-channel is emerging as retailers develop their online capabilities and muscle… the best of both worlds
- Logitech is uniquely positioned to expand into all channels, and to help our partners optimize shopping experiences

Summary

- Built a strong brand and consumer following through great products and broad global retail assets
- Proven category leadership based on strategic retail partnerships enable us to reach our target customers and grow market share
- Strong and growing global retail presence in-store and online
- Will continue evolving with needs and preferences of the retail market and consumers, enabling us to enter and launch new categories

products

+

reach

+

execution

=

barriers to entry

Thank You

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