

# Winning @ Retail & Online

Logitech Analyst & Investor Day

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11 March 2015

# Forward Looking Statements

This presentation contains forward-looking statements within the meaning of the U.S. federal securities laws, including, without limitation statements regarding: market and sales opportunities, distribution channels, our ability to capture new customers, retail channel evolution, and barriers to entry. These statements are subject to risks and uncertainties that may cause actual results and events to differ materially, including without limitation: if our product offerings, marketing activities and investment prioritization decisions do not result in the sales, profitability or profitability growth we expect, or when we expect it; the demand of our customers and our consumers for our products and our ability to accurately forecast it; if we fail to innovate and develop new products in a timely and cost-effective manner for our new and existing product categories; if we do not successfully execute on our growth opportunities in our new product categories or our growth opportunities are more limited than we expect; the effect of pricing, product, marketing and other initiatives by our competitors; if our products and marketing strategies fail to separate our products from competitors' products; if there is a deterioration of business and economic conditions in one or more of our sales regions or operating segments, or significant fluctuations in exchange rates. A detailed discussion of these and other risks and uncertainties that could cause actual results and events to differ materially from such forward-looking statements is included in Logitech's periodic filings with the Securities and Exchange Commission, including our Quarterly Report on Form 10-Q for the fiscal quarter ended December 31, 2014 and our Annual Report on Form 10-K for the fiscal year ended March 31, 2014, available at [www.sec.gov](http://www.sec.gov), under the caption Risk Factors and elsewhere. Logitech does not undertake any obligation to update any forward-looking statements to reflect new information or events or circumstances occurring after the date of this presentation.

# Winning @ Retail & Online

great products

+

global reach

+

retail execution



 global reach

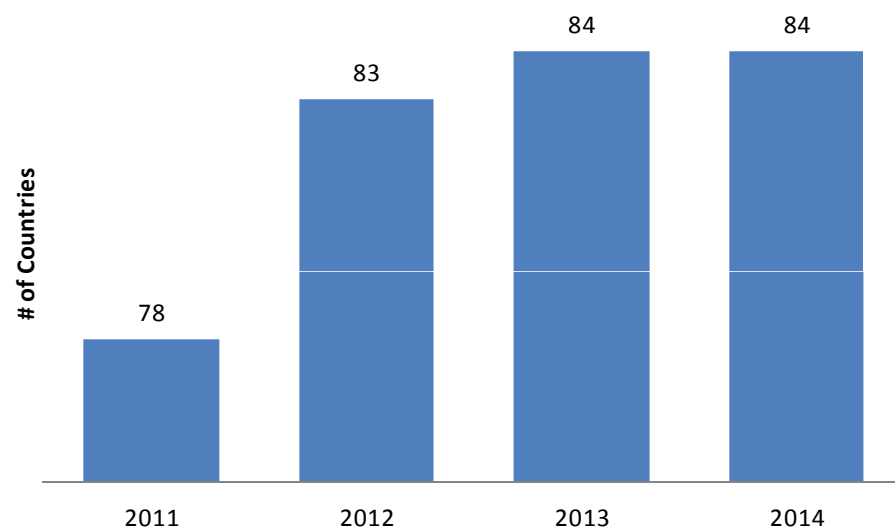
## Global Retail Reach

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



# Our Global Retail Footprint is a Powerful Asset

**WW Logitech Distribution**

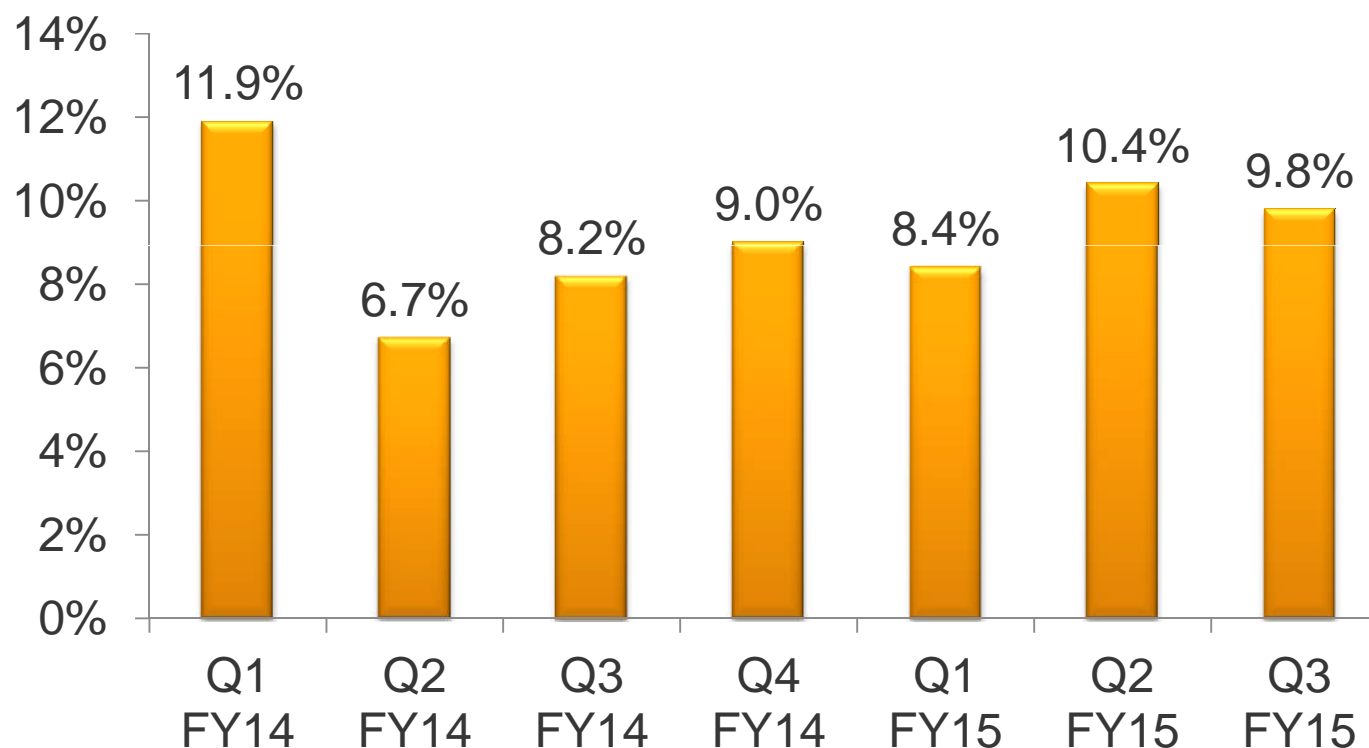


**Top 10 Countries**

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

# Consistent Sales Growth in Americas

YOY Sales Growth in our Americas Region

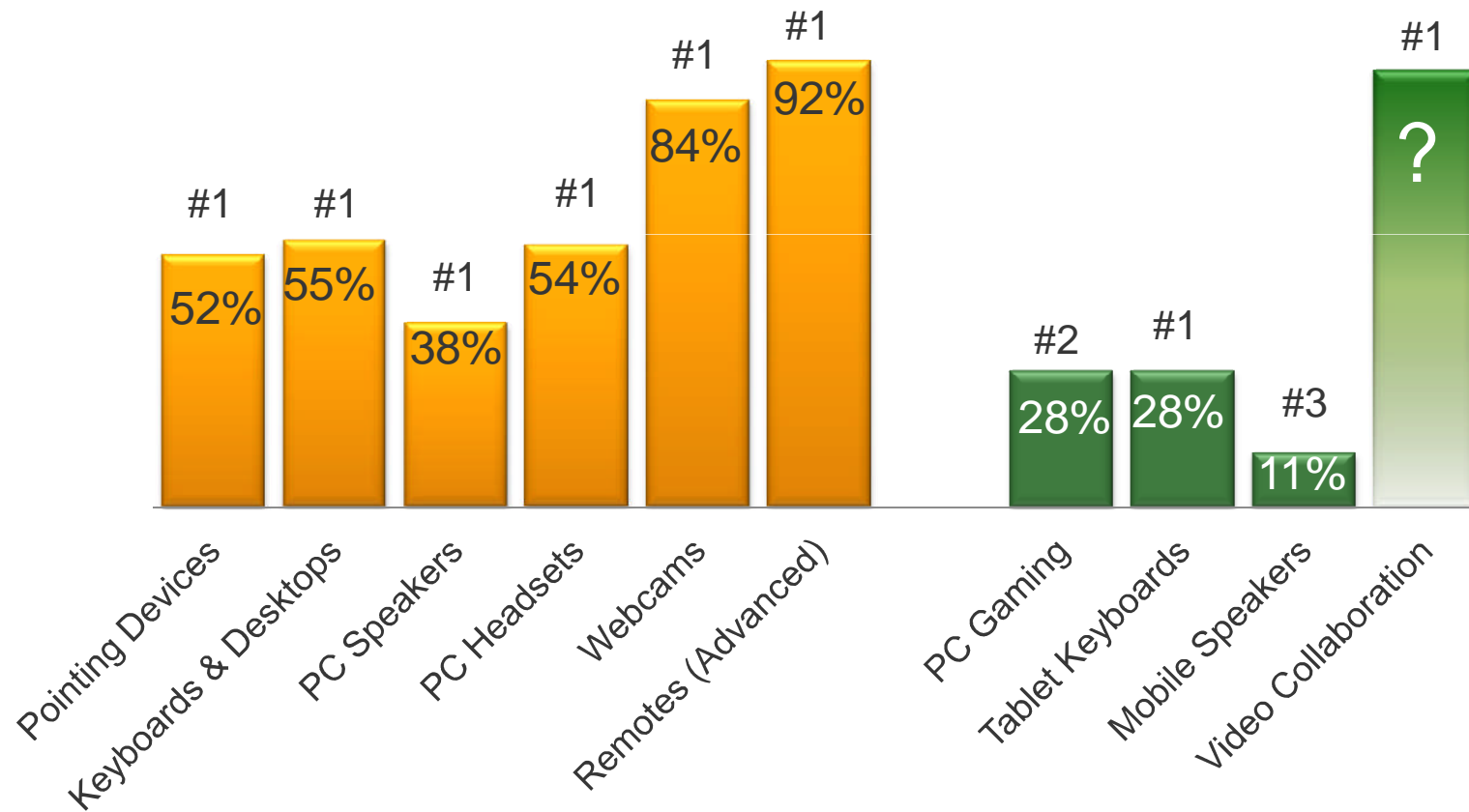




# Leading Market Share in Most Categories in the U.S



**Logitech Americas Value Share vs. Other Brands**  
(As of December 2014)





# 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

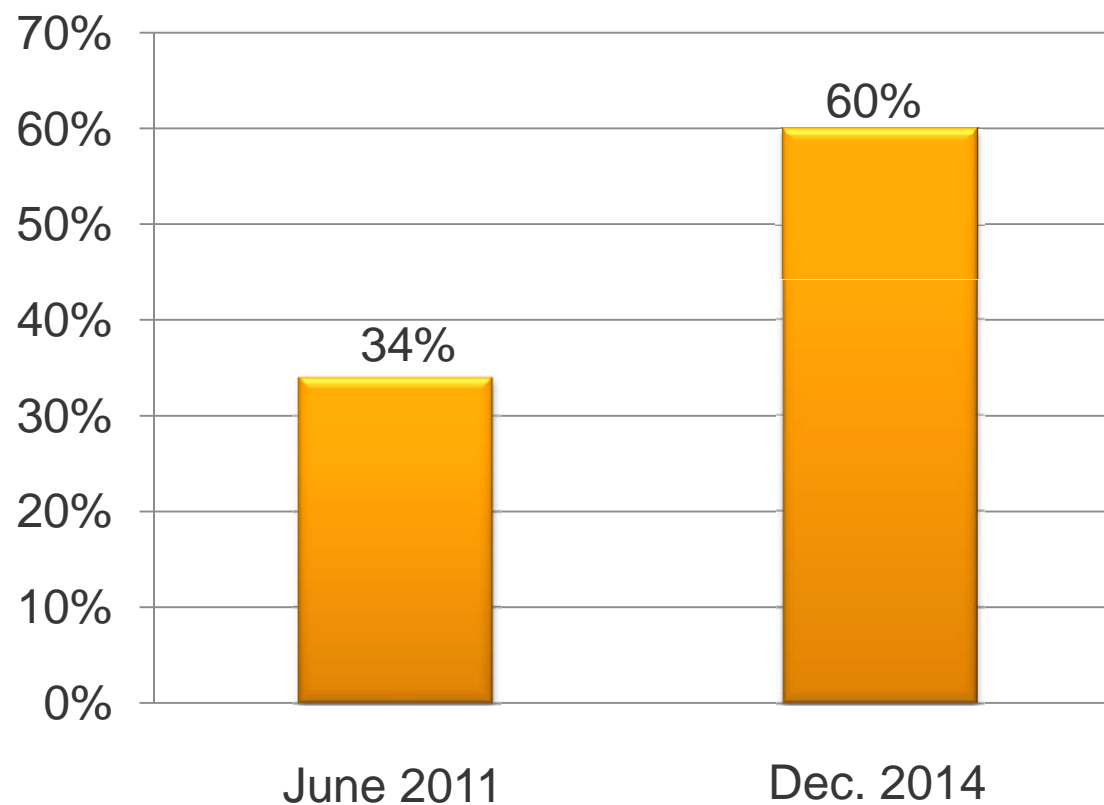


## Disciplined Focus on Retail Success

- 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

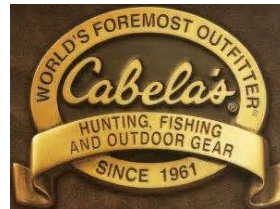
# Significant Growth in US Shelf Share

Category Leadership Enables Shelf Share Gains



# 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

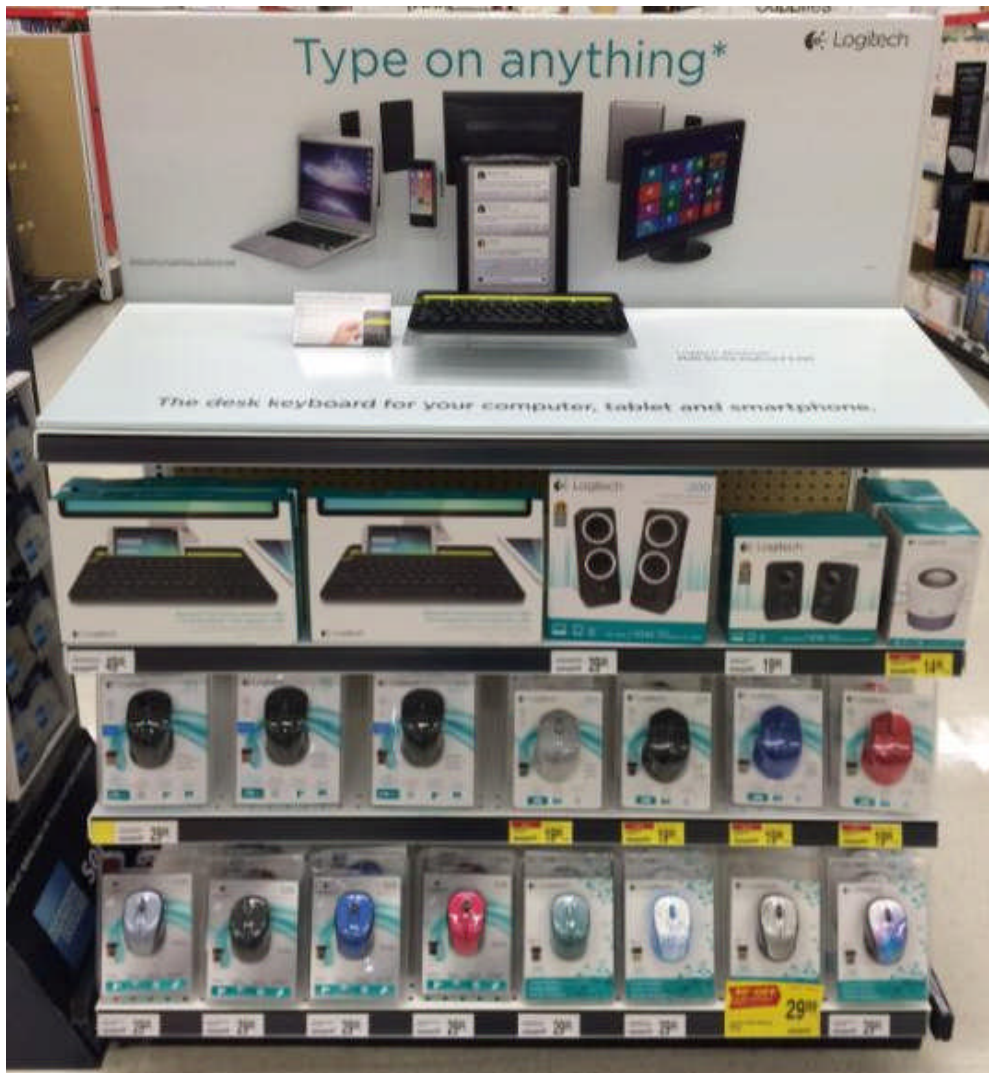




# Merchandising Tablet Keyboards & Covers



# 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

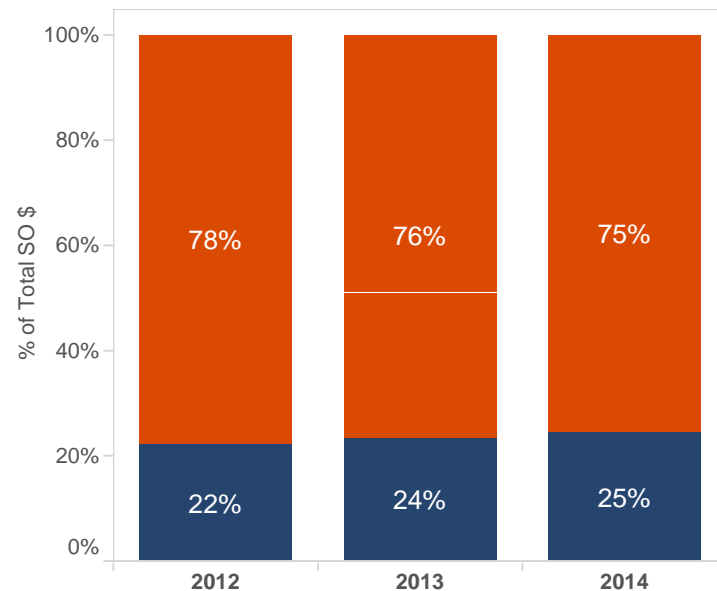
We create additional support through sales associate trainings.

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



# WW Logitech Sell-Through

## Online vs. In-Store



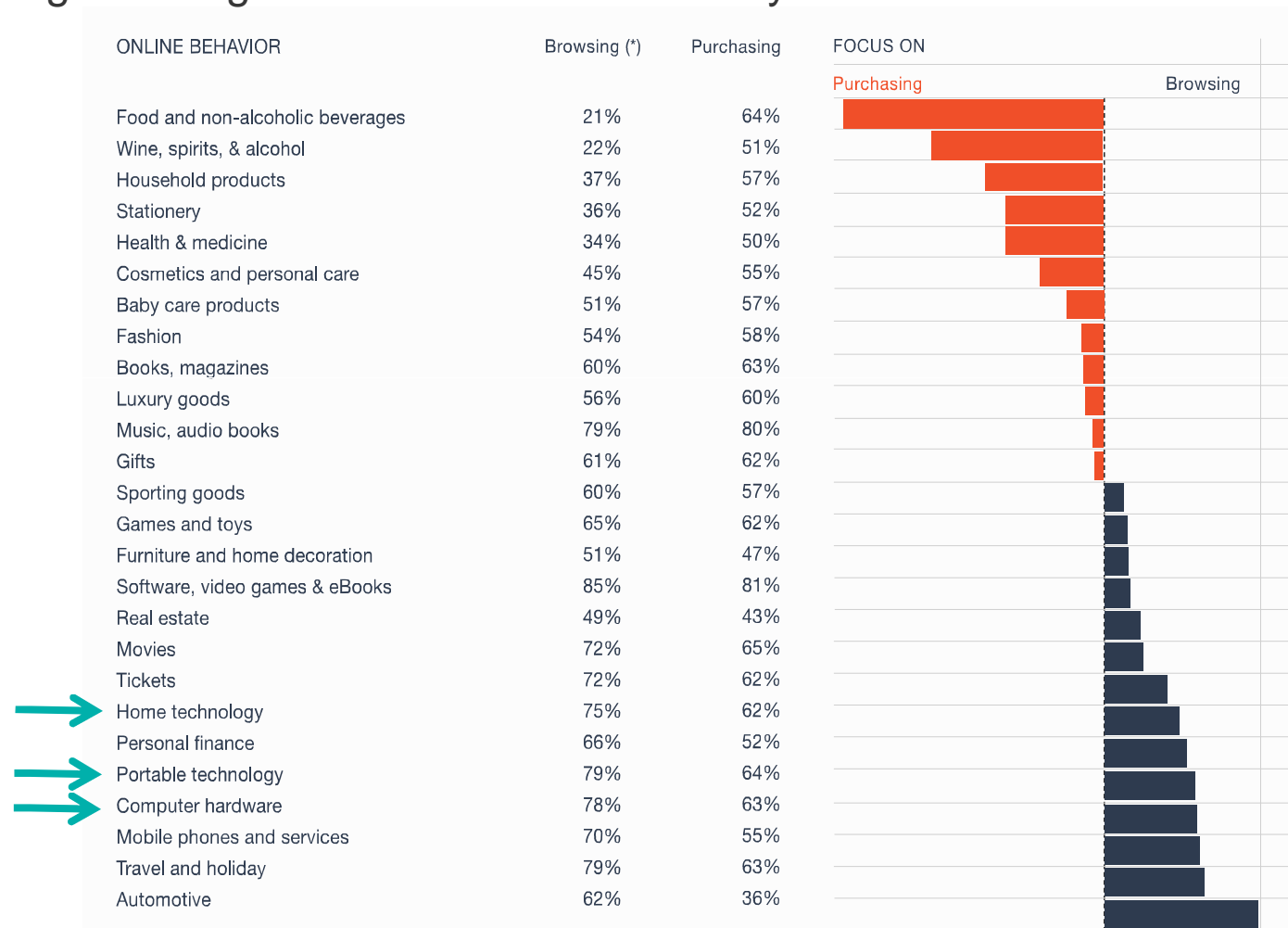
 In Store  
 Online

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

# Most Consumers Browse and Research Our Categories Online



Ensuring a Strong Online Presence & Identity Are Critical



\*Perform 50% or more of browsing online



# Using Research to Develop Content for Strategic Retail Partners



Heat maps assist with targeting and prioritizing content



# Our Rich Online Content Supports Product Selection and Sales



CLOSE
Provided by Logitech

Products
Solutions & Services
Account Center
All Product Catalog
Search for...

Hardware
Software
Cloud
Product Finders
Brands
Best Deals

All Categories > Collaboration & IP Telephony > Video Conferencing > Logitech ConferenceCam Connect - videoconferencing camera

### Logitech ConferenceCam Connect - videoconferencing camera

Logitech Mfg. Part: 960-001013 | CDW Part: 3599791 | UNSPSC: 45121520

★★★★★ Write the first review

**Availability:** Call  
Call for availability

- Videoconferencing camera
- color
- 1920 x 1080
- 1080p
- audio
- wireless
- USB 2.0

**Recommended Warranty**  
3 Year Consumer Electronic Coverage (\$500-749.99)

Qty **\$42.99**  
Advertised Price

**Add All Items To Cart**

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**PRODUCT OVERVIEW**

**Main Features**

- Videoconferencing camera
- color
- 1920 x 1080
- 1080p
- audio
- wireless
- USB 2.0
- H.264

**Features**

**Logitech® ConferenceCam Connect**  
**Uniquely Portable and Versatile All-in-One Video Collaboration for Small Groups**  
HD 1080p video and 360-degree sound meet portability and affordability with the all-in-one Logitech ConferenceCam Connect. Optimized for small workgroups of 1-6, this videoconference solution offers multi-device connectivity and sets up in a snap. Now enterprise-quality video, a USB and Bluetooth® speakerphone, and wireless screen-mirror projection are available in virtually any workspace.

### Bluetooth® Multi-Device Keyboard K480 (Black) 920-006342

Images Features Compare Document

#### Bluetooth Multi-Device K480

Switch easily between devices

Just turn the Easy-Switch dial to switch between typing on three connect Bluetooth wireless devices.

Windows and Mac. Android and iOS.

- Familiar keyboard layout with all the shortcut keys you use the most
- Type on a Windows, Mac or Chrome computer plus Android or iOS tablet or smartphone

### Switch easily between devices

Just turn the Easy-Switch dial to switch between typing on three connect Bluetooth wireless devices.

### Windows and Mac. Android and iOS.

- Familiar keyboard layout with all the shortcut keys you use the most
- Type on a Windows, Mac or Chrome computer plus Android or iOS tablet or smartphone

## Select the mouse or keyboard That's right for you

### Mouse

#### Wireless vs. Wired

First consider whether you want a wireless or wired mouse. A wireless mouse offers greater freedom of movement, while a wired mouse means you won't ever need to replace batteries or recharge your mouse.

When selecting a wireless mouse, consider your wireless connectivity and the type of receiver it uses.

Wireless Connection	Wireless Receiver
2.4 GHz	Uniboard® 2.4 GHz USB plug
Bluetooth	Bluetooth® receiver
Bluetooth	Bluetooth® receiver
Bluetooth	Bluetooth® receiver
Bluetooth	Bluetooth® receiver

#### Optical vs. Laser

Most mice operate by tracking "dots per inch" (dpi). If you want higher performance and smoother tracking (especially for gaming or graphic design programs), you'll want a mouse with more precise tracking. New mouse models with advanced laser technology (such as Logitech® Darkfield Laser Tracking™) work even on glass surfaces, something that an optical or traditional laser mouse can't do.

Tracking	Tracking
Optical	Optical (4000 DPI)
Optical	Optical (4000 DPI)
Optical	Optical (4000 DPI)
Optical	Optical (4000 DPI)

#### Programmable Buttons & Scrolling

Most mice come with standard left and right click buttons and a scroll wheel, but some mice include additional buttons that can be programmed for specific functions that save you time (such as when surfing the web) or improve your performance (especially when gaming). Even scrolling has become more sophisticated, including side-to-side and hyper-fast scrolling.

Buttons	Scrolling
Buttons	Buttons
Buttons	Buttons
Buttons	Buttons
Buttons	Buttons

#### Comfort & Style

For improved comfort, select a mouse that fits your hand size (travel size, mid-size or full-size) and the way you hold your mouse (right-handed, left-handed or ambidextrous). Also look for natural contoured shapes, good button placement and rubberized surfaces for a softer feel and better grip.

In addition to fitting your hand, your mouse can also fit your style. Mouse styles range from sleek black to technicolor to bold and colorful, such as the Logitech® V200 mouse collection with unique colors and graphic patterns.

### Keyboard

#### Wireless vs. Wired

A wired keyboard is often the most economical option, but wireless keyboards reduce desktop clutter and allow you to use your keyboard away from your computer, even giving you the ability to control your home entertainment center from your couch. Pay attention to battery life for wireless keyboards—some models offer up to three year battery life or a dock that charges your keyboard when not in use.

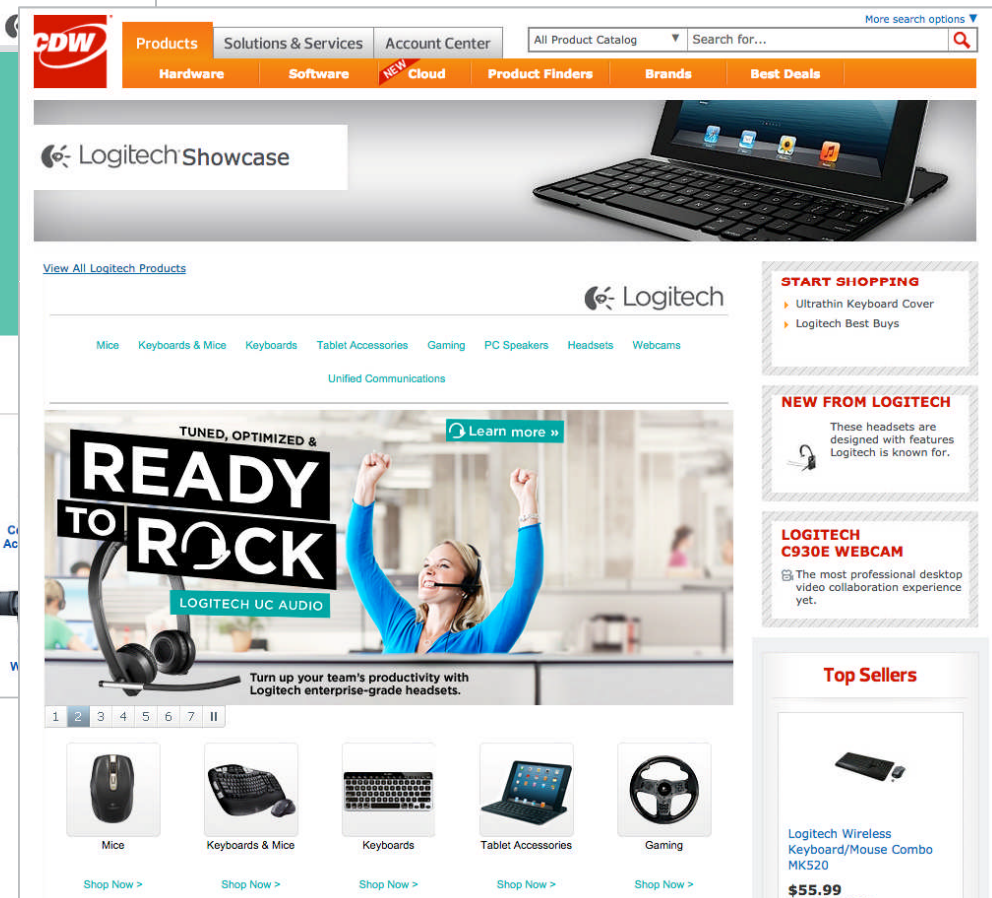
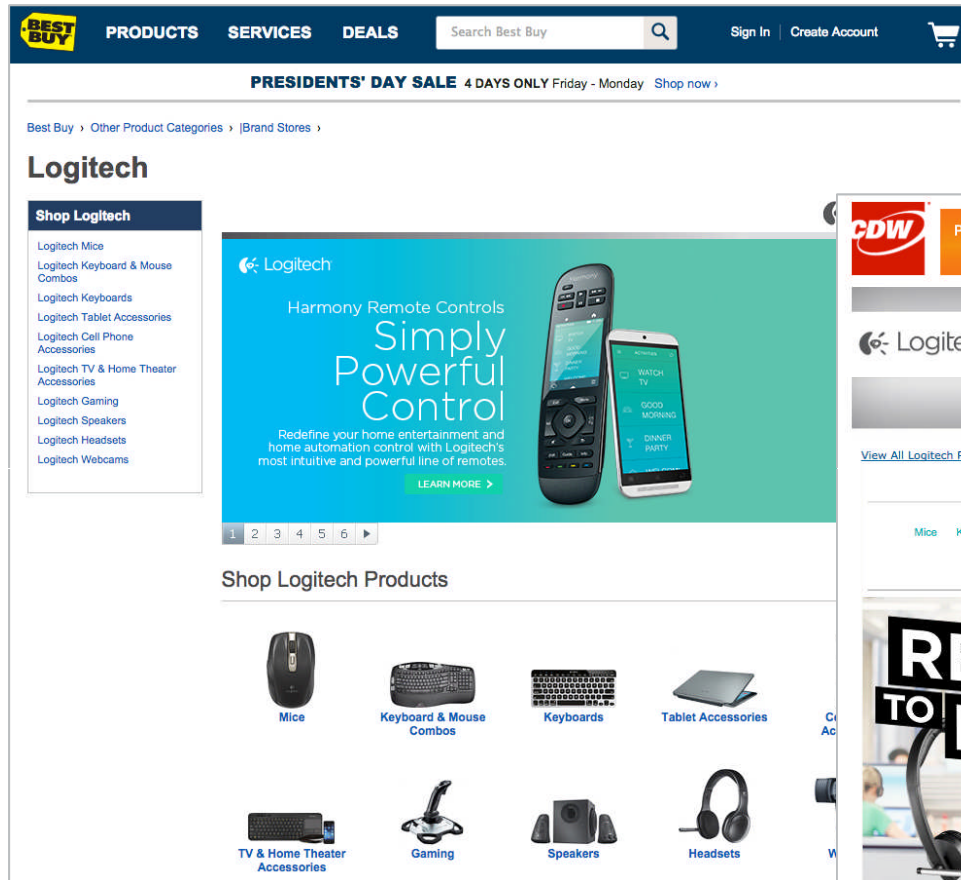
When selecting a wireless keyboard, consider your wireless connection and the type of receiver it uses (see wireless chart in mouse section above for connection and receiver options).

#### Comfort & Feel

Keyboard comfort is a matter of individual preference, but two designs...

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# We Create and Build Dedicated Online Brand Stores

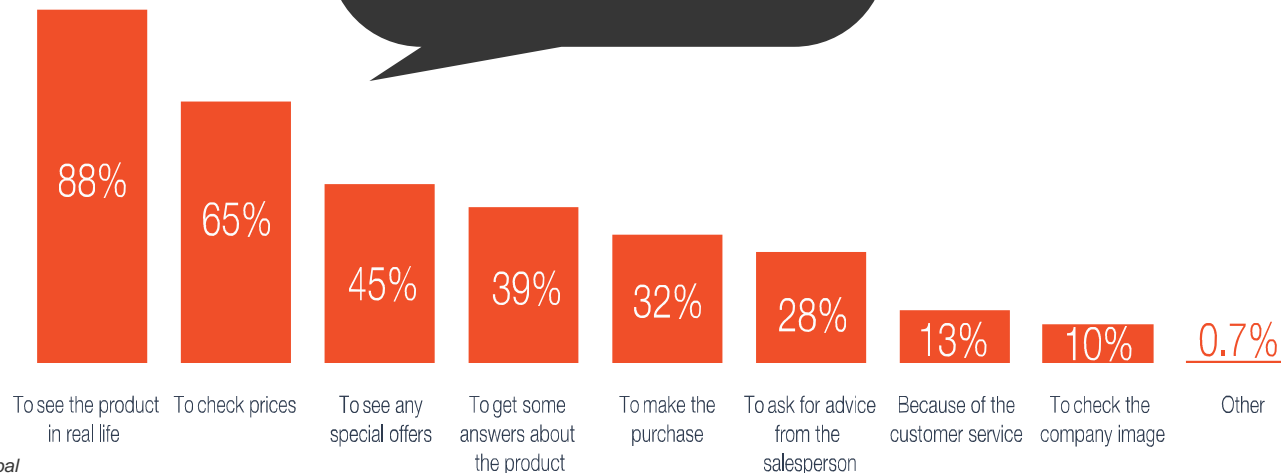




# Next Evolution in Retail...Multi-Channel

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

Why consumers visit retail stores to validate purchases they have already researched online



## 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

