CREATIVITY & PRODUCTIVITY

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March 2020

logitech



FORWARD-LOOKING STATEMENTS, CONSTANT CURRENCY & SELL-THROUGH

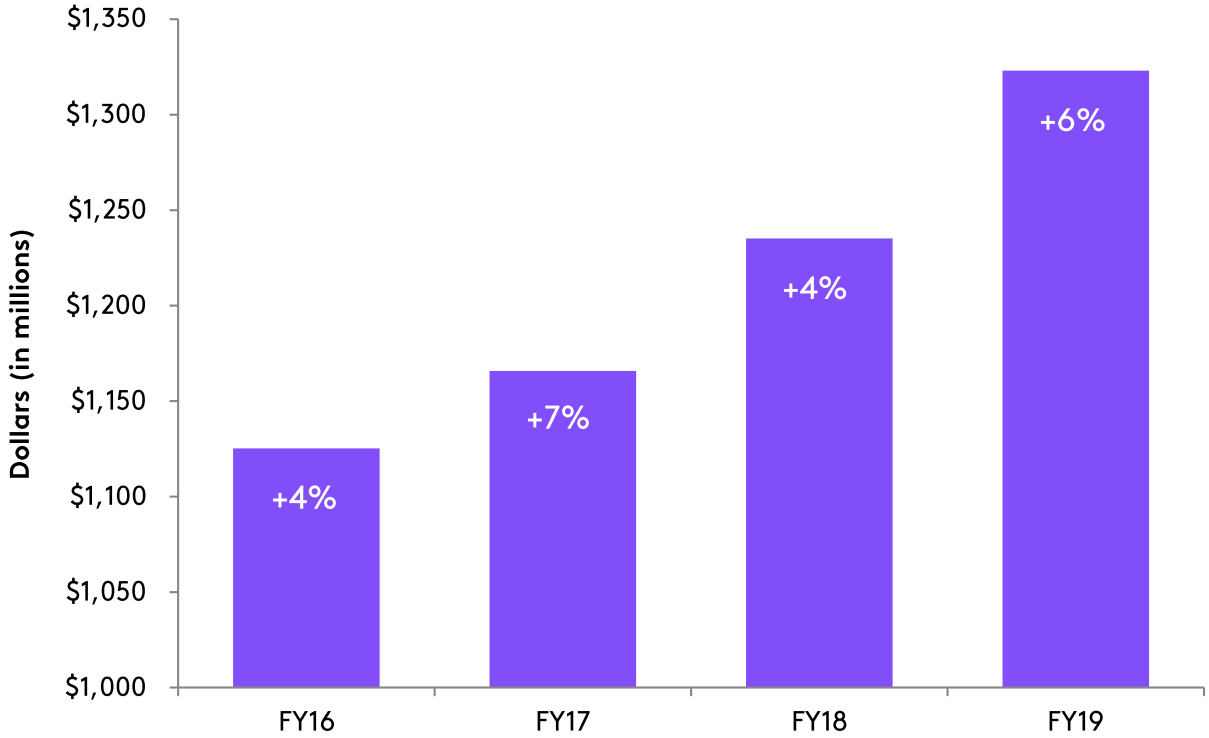
This presentation includes **forward-looking statements** within the meaning of the U.S. federal securities laws, including, without limitation, statements regarding: product category sales and sales growth, ways to grow, focus, category trends, digital content creation and its effect on our business, product portfolio, product features and capabilities, innovation, software and applications, marketing model, growth opportunities, growth acceleration, and target audience expansion. 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; 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 or our growth opportunities are more limited than we expect; the effect of pricing, product, marketing and other initiatives by our competitors, and our reaction to them, on our sales, gross margins and profitability; if our products and marketing strategies fail to separate our products from competitors' products; if we are not able to maintain and enhance our brands; if there is a deterioration of business and economic conditions in one or more of our sales regions or product categories, or significant fluctuations in exchange rates; changes in trade policies and agreements and the imposition of tariffs that affect our products or operations and our ability to mitigate; risks associated with acquisitions; risks associated with international operations; risks associated with manufacturing and doing business in China and Southeast Asia; risks associated with purchasing key components and products from a limited number of sources. These and other risks and uncertainties are detailed in Logitech's filings with the Securities and Exchange Commission, including our Annual Report on Form 10-K for the fiscal year ended March 31, 2019 and our Quarterly Report on Form 10-Q for the fiscal quarter ended December 31, 2019, available at 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.

To facilitate comparisons to Logitech's historical results, we present percentage sales growth in **constant currency** ("CC") to show performance unaffected by fluctuations in currency exchange rates. Percentage sales growth in constant currency is calculated by translating prior period sales in each local currency at the current period's average exchange rate for that currency and comparing that to current period sales. Logitech believes this information will help investors to evaluate its current period performance, outlook and trends in its business.

Logitech relies on reports from third-parties for data on its **product sell-through and inventory information**. While Logitech believes this information provides meaningful perspectives on sell-through and inventory trends over time, this information is not subject to Logitech's internal control systems and Logitech cannot assure investors of its accuracy.

C&P CAN KEEP GROWING

6%
CAGR
(FY16-FY19)



Note: Sales growth is in constant currency.

HERE'S HOW...

YOU LOVE US FOR THIS





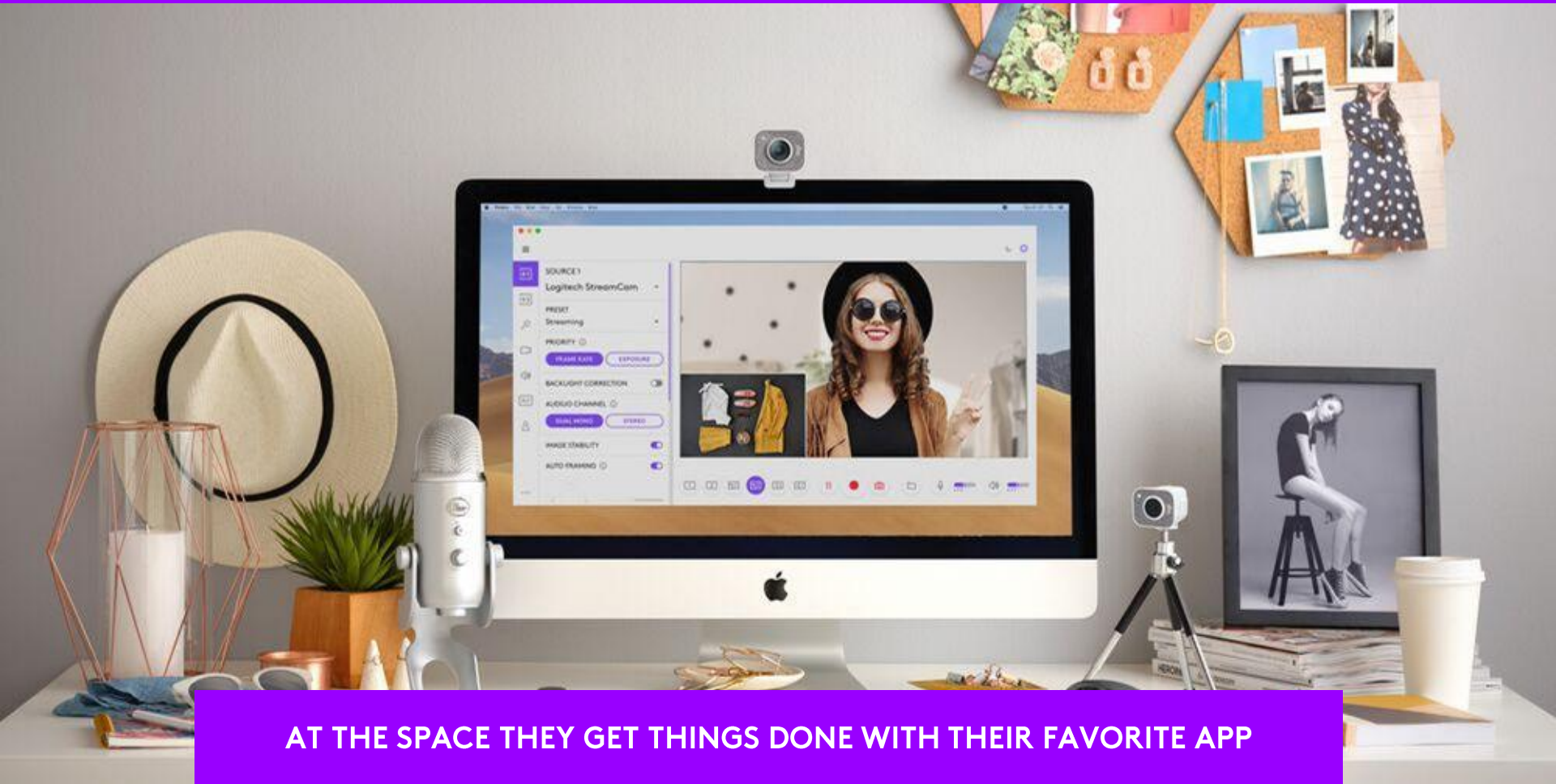




OUR FOCUS IS TO HELP PEOPLE CREATE & COMMUNICATE



OUR FOCUS IS TO HELP PEOPLE CREATE & COMMUNICATE



AT THE SPACE THEY GET THINGS DONE WITH THEIR FAVORITE APP

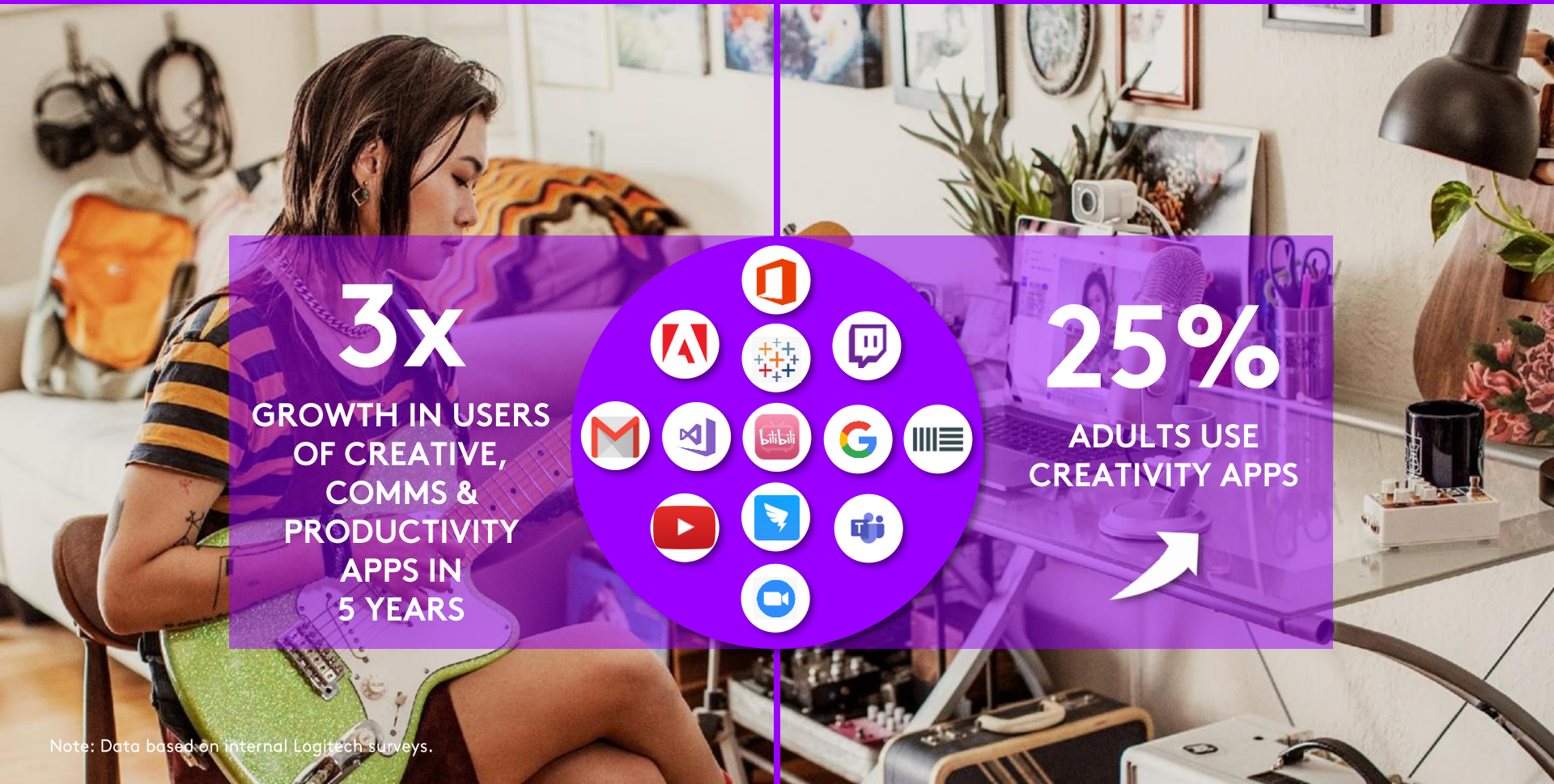
END-TO-END DIGITAL CONTENT CREATION EXPERIENCE





STRONG TREND IN DIGITAL CREATIVITY, PRODUCTIVITY & COMMUNICATION

MORE APPS & MORE PEOPLE CREATING CONTENT IN THE CLOUD



3x

GROWTH IN USERS OF CREATIVE, COMMS & PRODUCTIVITY APPS IN 5 YEARS

25%

ADULTS USE CREATIVITY APPS

Note: Data based on internal Logitech surveys.

MORE APPS & MORE PEOPLE CREATING CONTENT IN THE CLOUD



3x

GROWTH IN USERS OF CREATIVE, COMMS & PRODUCTIVITY APPS IN 5 YEARS

32%

MILLENNIALS USE CREATIVITY APPS

Note: Data based on internal Logitech surveys.

MORE APPS & MORE PEOPLE CREATING CONTENT IN THE CLOUD



3x

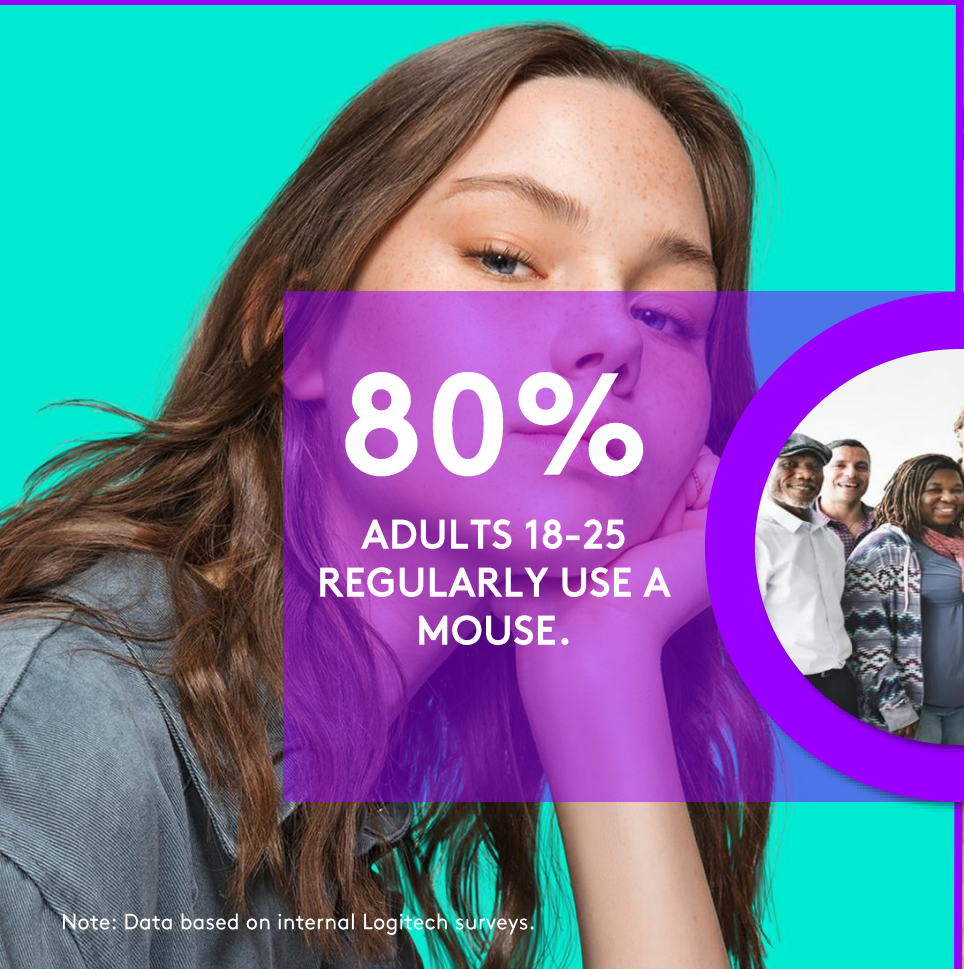
GROWTH IN USERS OF CREATIVE, COMMS & PRODUCTIVITY APPS IN 5 YEARS

43%

GEN Z USE CREATIVITY APPS

Note: Data based on internal Logitech surveys.

PEOPLE NEED A SPACE TO GET THINGS DONE…WITH OUR PRODUCTS



80%

ADULTS 18-25 REGULARLY USE A MOUSE.



PEOPLE NEED A SPACE DAILY TO GET THINGS DONE

Note: Data based on internal Logitech surveys.

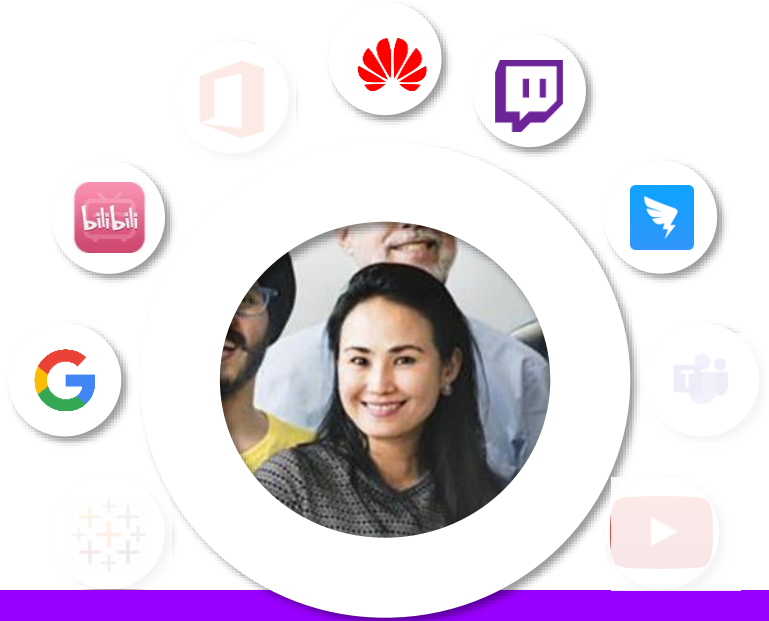


WE HAVE MORE PEOPLE TO REACH THAN EVER BEFORE

A BIG OPPORTUNITY

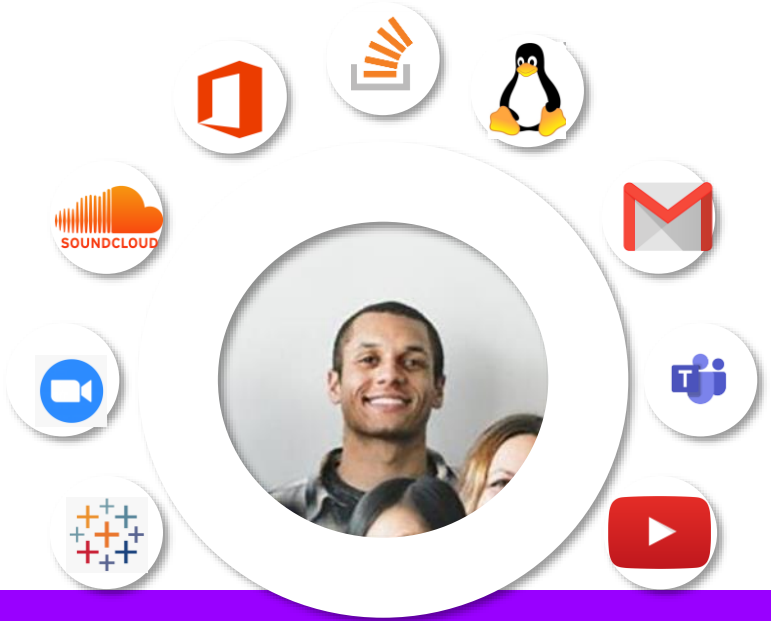


OUR DESIGN STRATEGY PUTS PEOPLE FIRST



WE FOCUS ON THE CONSUMER: ONE SIZE DOES NOT FIT ALL

Precise targeting → Deep insights → Design for…
Market to…



WE FOCUS ON THE CONSUMER: ONE SIZE DOES NOT FIT ALL

Precise targeting → Deep insights → Design for…
Market to…



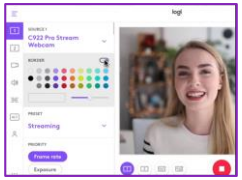
VIDEO CONTENT CREATOR

Create
Connect
Share their passion

Simply
Beautiful
At the right price







VB “Capture software is simple and powerful.”









GREAT PRODUCT DESIGN & EXPERIENCES

“OMG where do I begin. [This] is the best mouse you can buy right now... this mouse is perfect.”

"...I love this keyboard and wish I could give it more stars."

Note: Ratings and quotes are from Amazon.

MX Master Series: Think It. Master It.



amazon

★★★★★

"The mouse… is wonderful, but the Flow software is amazing. I can even copy and paste text from one computer to the other."

Flow software: All Systems Flow.



CUSTOMIZATION

Note: Ratings and quotes are from Amazon.

StreamCam: Share Your Passion.

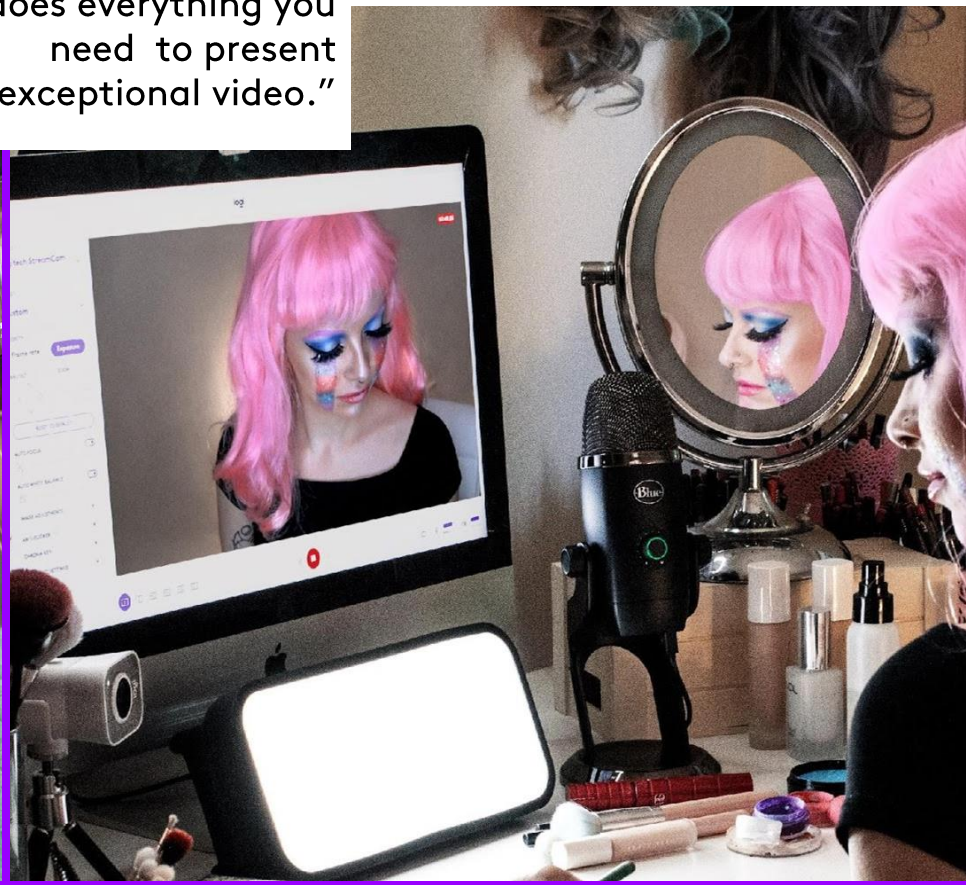
Capture: Lights, Camera, Capture



BEST BUY

★★★★★

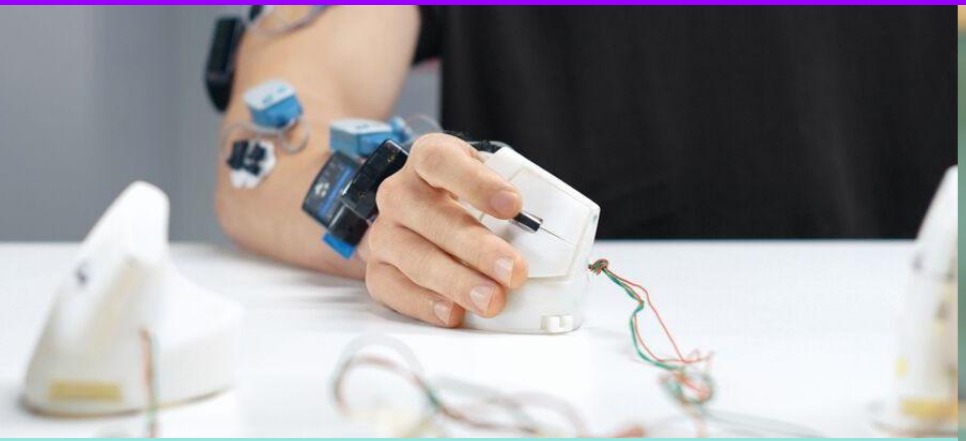
"The software…is great and does everything you need to present exceptional video."

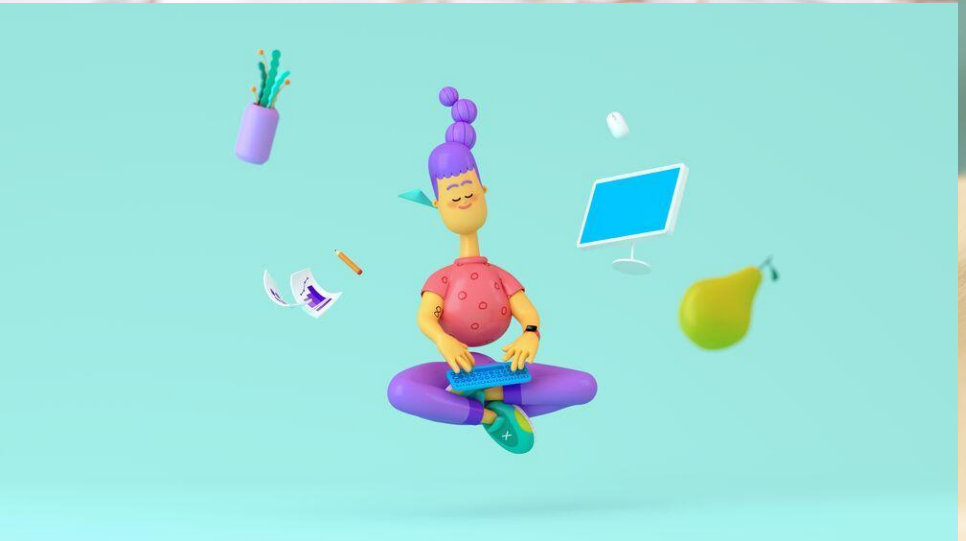


SIMPLICITY

Note: Ratings and quotes are from Best Buy.

EXPERTISE, SCIENCE, DESIGN & PERFORMANCE WIN HEARTS





"... this [product] changed my life...

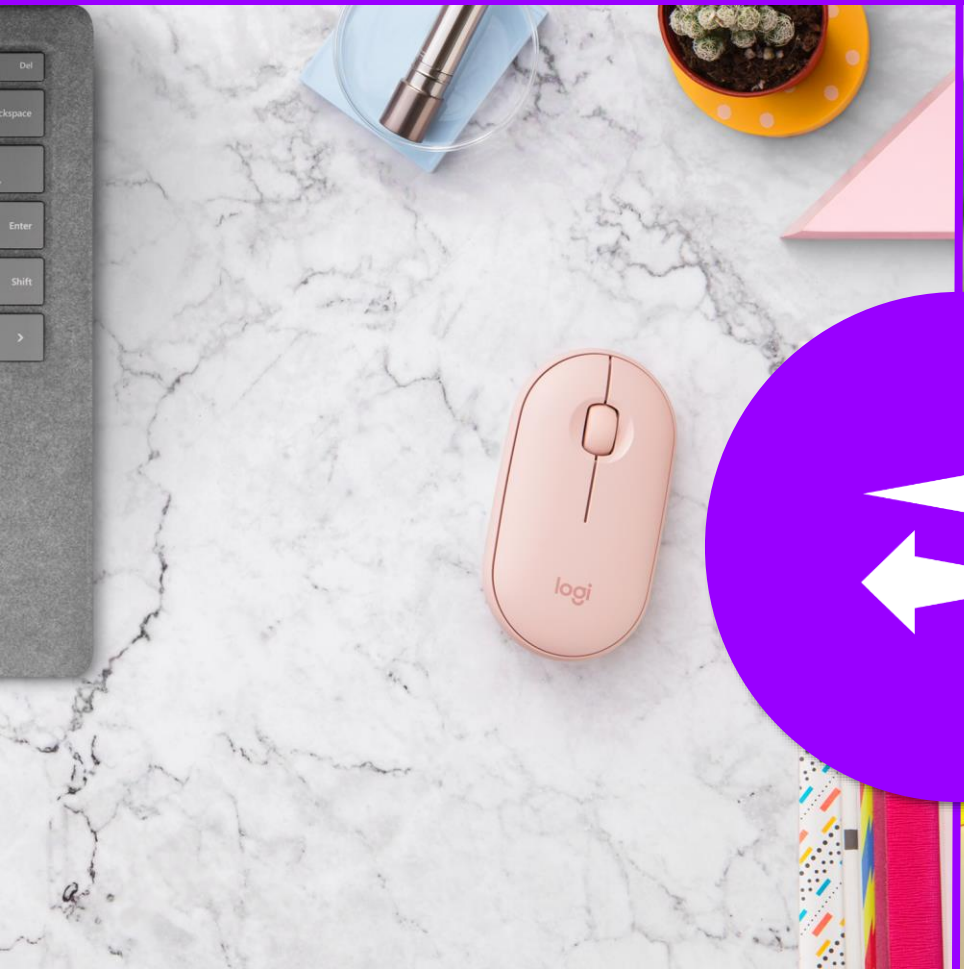
"Finally an amazing ergonomic keyboard."

"Best Keyboard of All Time."

"...I love this keyboard and wish I could give it more stars."

Note: Quotes are from Amazon.

IDEAL TO DUPLICATE THE EXPERIENCE AT HOME & WORK







WE EMBED OUR PRODUCTS, BRAND & MARKETING WITH CONSUMER PASSIONS

WE'RE SHIFTING TO A PULL MARKETING MODEL, GENERATING DEMAND



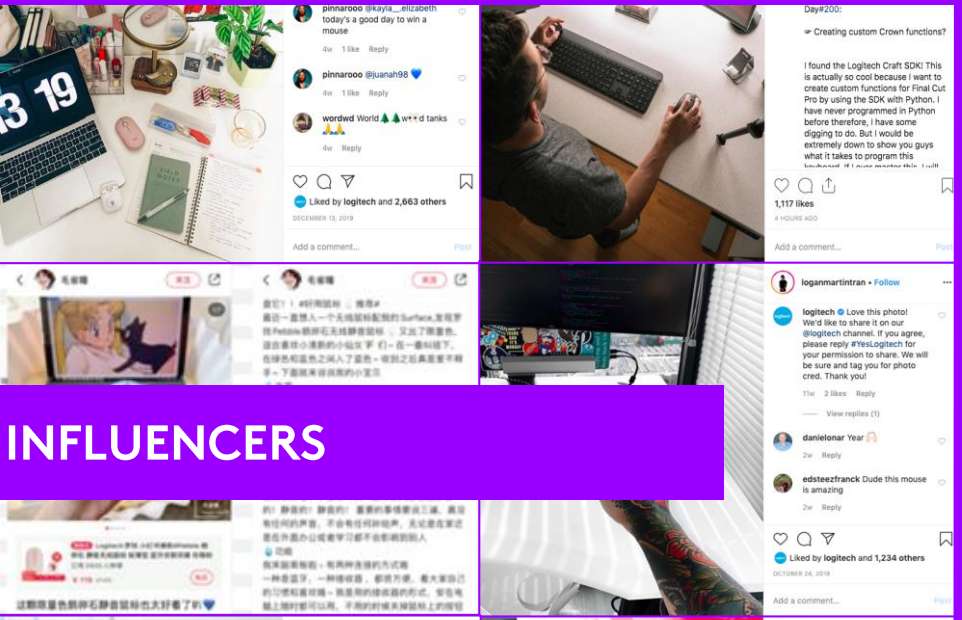
From this in Nov 2018...

300% growth in engagement

..to this in Jan 2020

Logitech-Sprinklr data

WE COMMUNICATE THROUGH AUTHENTIC THIRD-PARTY VOICES



INFLUENCERS

TRADITIONAL MEDIA

100+ Cool and Trendy Gifts For Teens That'll Make You Say "One For You, One For Me"



BUSINESS INSIDER

YouTuber Marques Brownlee unveiled his top picks for gadget gifts this holiday season — here's what made his list

Antonio Villas-Boas Dec 12, 2019, 12:33 PM



YouTuber Marques Brownlee. MKBHD/YouTube





WE COMMUNICATE THROUGH DIVERSE CHANNELS



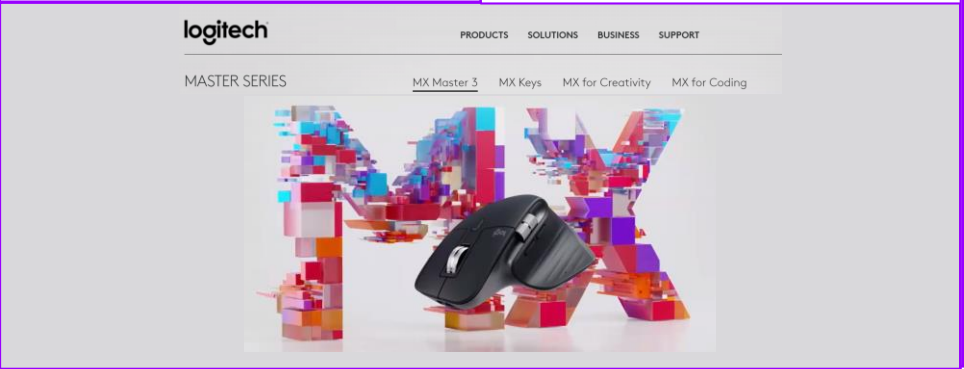


OWNED

Liked by **hannah_clark_** and **21,704 others**

logitech Already thinking of your next vacation? 🌴 Unleash the magic of 2020 with MX Keys and MX Master 3. ✨
📸: @nicolay.t

logitech There may or may not be a 'Naughty or Nice' list hiding in this notebook. 📓 Own your ~holiday~ space with Logitech Pebble and do us a favor, stay on the Nice list. 😉
📸: @wooden_blush_co





PAID





ALL THE WAY TO THE SHELF



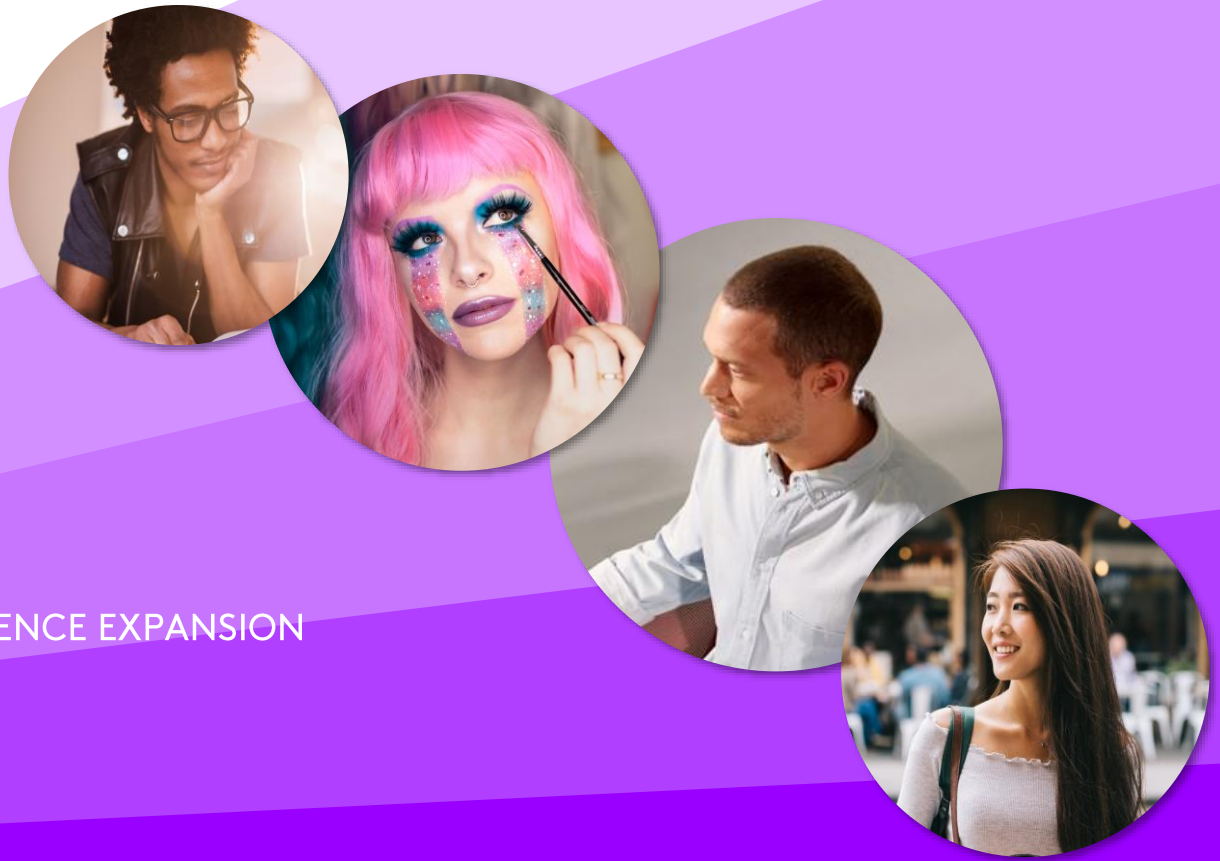
FNAC STORE SALES OUT
ERGO & MX +100%



MEDIAMARKT STORE SALES OUT
ERGO & MX +20%

Note: Comparisons are year-over-year for Q3'20.

WE CAN DO IT OVER & OVER AGAIN



ACCELERATE GROWTH
THROUGH SPECIFIC TARGET AUDIENCE EXPANSION
+ CONSTANT INNOVATION
+ REACH

ROBUST CORE BUSINESS

WE ARE UNIQUELY POSITIONED TO GROW STEADILY



Deep
consumer insights



Continuous
innovation



Diverse portfolio
Global & local



Operational
excellence

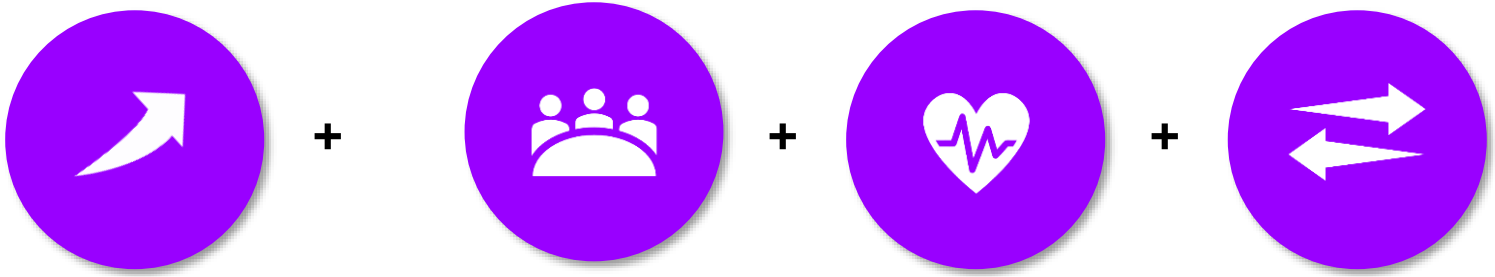


Cross-OS
compatibility



Technology
leadership

A WINNING FORMULA



Increase in content creation + People first, more content creators + Pull marketing + B2B & Consumer

CONSISTENT GROWTH OPPORTUNITIES FOR YEARS TO COME

THANK YOU

