Capital Market Days 2020
Strategic Action Field: User Experience
Key Differentiator for Consumers and OEMs

Ticker: CON
ADR-Ticker: CTTAY
http://www.continental-ir.com

Ralf Lenninger, Head of Strategy and Future Solutions, VNI
December 10, 2020
User Experience
Key Strategic Action Field

- Autonomous Mobility
- Smart Mobility
- User Experience
- Safety

Software and Systems Excellence

Architecture and Networking
User Experience
UX Matters: Joy of Use, Ease of Use and Safe Driving
User Experience
UX Matters: Joy of Use, Ease of Use and Safe Driving

Visual
› Display Solutions
› Head Up Displays
› Cabin Sensing

Tactile outside
› Secure digital car, access via key or phone

Audial
› Sound Solutions

Tactile inside
› Shytech
› Haptic Controls

Software & System
› Augmented Reality
› 3D Content
› Monitoring algorithms

System Integration
› Cockpit HPC¹

We deliver > 120 mn UX products per year to more than 25 OEMs!

¹ HPC: High-Performance Computer
User Experience
UX Matters: Driving Consumer`s Car-Buying Decision

EXPERIENCE
EASE OF USE

Consumer – need for emotion
› Ease and joy of use leads to customer satisfaction
› Willingness to pay

CREATE
UNIQUENESS

OEM – need for differentiation
› Traditional differentiators are losing significance
› High-value interior as new key brand identifier
User Experience
UX Matters: More Content per Vehicle is Driving Value

MARKET DRIVERS
› More functions
› Legislation
› Electric vehicles
› Automated driving

RESULT
› Consumer: Ease of use
› OEM: Add-on revenue
› Supplier: Value increase

DIGITAL

ANALOG
User Experience
Driving Our Digital Transformation: We Outperform the Market

Sales in Action Field¹ (€)

<table>
<thead>
<tr>
<th>Expected Outperformance²</th>
<th>2020E</th>
<th>Mid-term</th>
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<tbody>
<tr>
<td>~ -15%-pts</td>
<td></td>
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<td>~ +5%-pts</td>
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<td>&gt; +30%-pts</td>
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Further growth in system integration

- Related HPCs
  - Cockpit HPC
- Related Cabin Sensing
  - Camera and Sensors

Further growth in software and systems

- Software and Systems
  - UX content
  - UX services

Display Solutions
- Design, extended features, joy of use and legal requirements

Full Digital Clusters
- Design, joy of use and legal requirements

Head Up Display
- Less driver distraction and augmented reality

Access
- Comfortable and secure digital car access

Legacy Business
- Instrument clusters, haptic controls, car radios

¹ Based on mid-term IHS light vehicle production (LVP) forecast from November 2020
² Mid-term organic sales growth above IHS LVP

Based on mid-term IHS light vehicle production (LVP) forecast from November 2020

Mid-term organic sales growth above IHS LVP
## User Experience
What Makes Us Successful: Leading in All Four Core Competences

<table>
<thead>
<tr>
<th>TODAY</th>
<th>DESIGN</th>
<th>TECHNOLOGY</th>
<th>INTERACTION</th>
<th>INTEGRATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Flat 2D displays</td>
<td>Separated devices</td>
<td>One-way communication</td>
<td>Stand-alone HMI¹ controllers</td>
</tr>
</tbody>
</table>

| TOMORROW | › Large displays, 3D | › Integration of features into display solutions | › Perfect networking of all UX components | › High-performance computers connect domains and enable holistic UX |

¹ Human Machine Interface
User Experience
Creating Uniqueness Through Design

Launched

VW TOUAREG
Curved Center Stack
1ST to market

MB E-/S-Class
Side by Side
1ST to market

Upcoming

C-Shape
SOP 2022

L-Shape
SOP 2021

Future

Interactive Shytech Surfaces

Kinematic Pillar-to-Pillar & Cabin Solutions

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User Experience
We Integrate Innovative Features Increasing Our Value

Own hardware value creation and refinement by Continental

Purchased parts
- Front glass
- Display panel

High quality surfaces:
- Daylight readability
- Optical bonding for crystal clear image
- Narrow border design

Next level interaction design:
- Haptic feedback
- Touch, proximity and gesture detection
- Pre-shaped designs with finger guidance

Technology (r)evolution:
- Camera + infrared (IR) illumination
- Camera eyeball tracking
- New backlight technology
- Enabling natural 3D experience

Software IP:
- 3D display content
- UX software

Integration expertise:
- Infrared camera integrated behind cover lens

Electronic PCBs
- Backlight LED PCB
- Backlight mech. components
- Die cast housings

Electronic elements
- PCBs
- Display panel
- Backlight
- Mech. components

PCB: Printed Circuit Board

1
User Experience
We Orchestrate the "One" Holistic Experience
User Experience
Simply Scalable

Simple  Fully integrated

UX SW  +  UX SW  +  UX SW  +

Product  Product  Product  Product

+UX  +OEM  +3D

3D CONTENT LeiaLoft™

OEM SW  +  OEM SW  +  OEM SW  +

MB S-Class  Hyundai Genesis  VW ID.3  Citroen C4

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Integration
User Experience
Horizontal Knowledge Drives Our Innovations

All UX domains
- Display Solutions
- Interior Camera
- Head Up Display

High Performance Computers

Cockpit → Body → Safety and Motion → ADAS

Integration

- Cabin Sensing, Health, Wellbeing
- Augmented Reality
- Driver Monitoring
- 3D Transparent Hood
User Experience
Augmented Reality Head Up Display

Synergy Example
UX, Architecture, Safety, SW Excellence and Autonomous Driving
User Experience
We Drive the Trends, Growth, at Scale

We bring home the awards.

We lead the technology.

We orchestrate the "One" holistic experience.

We make the innovations happen.
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