



# Capital Market Days 2020

## Strategic Action Field: User Experience

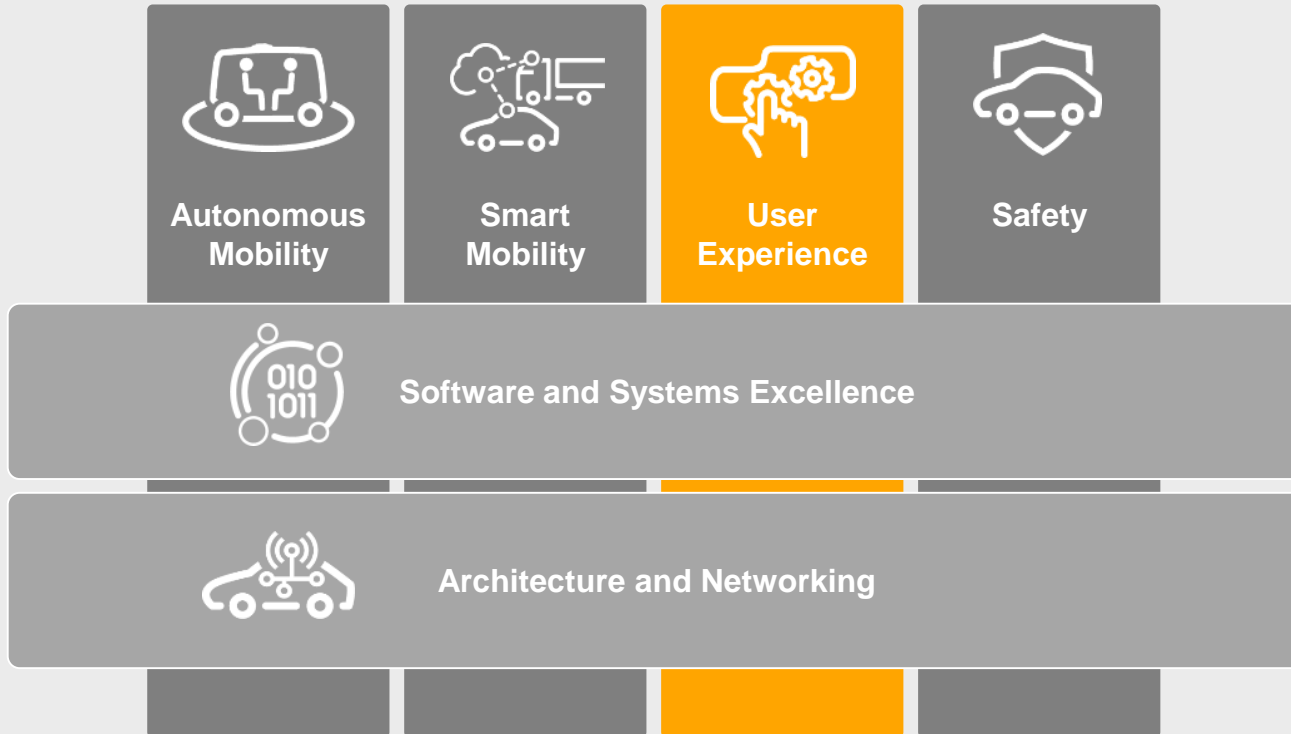
### Key Differentiator for Consumers and OEMs

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

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December 10, 2020

# User Experience

## Key Strategic Action Field



# 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

### Software & System

- › Augmented Reality
- › 3D Content
- › Monitoring algorithms

### Audial

- › Sound Solutions

### System Integration

- › Cockpit HPC<sup>1</sup>

### Tactile outside

- › Secure digital car, access via key or phone

### Tactile inside

- › Shytech
- › Haptic Controls

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

<sup>1</sup> 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



ANALOG

The image shows a traditional car interior with a steering wheel, analog gauges, a central infotainment screen, and a gear shift. The overall aesthetic is functional and physical.

MARKET  
DRIVERS

- › More functions
- › Legislation
- › Electric vehicles
- › Automated driving



DIGITAL

The image shows a futuristic car interior with a large, curved digital display. A hand is interacting with the screen, which displays a 3D avatar of a woman named Jessica Smith. The interface is sleek and high-tech.

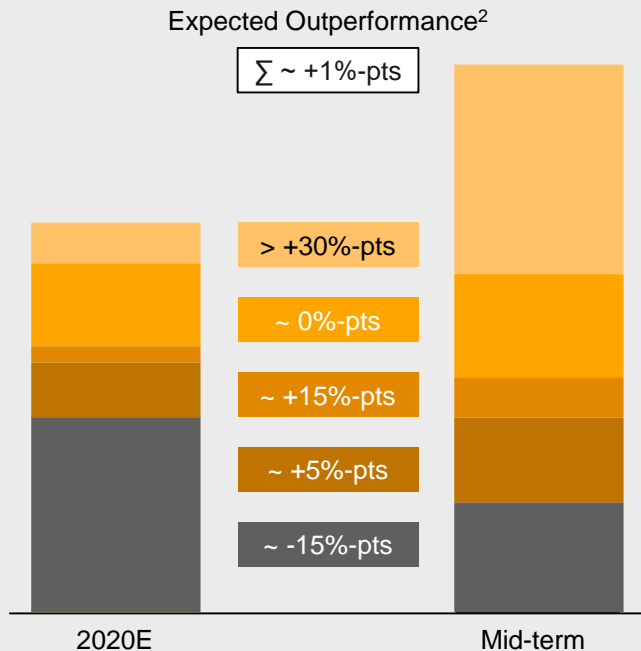
RESULT

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

# User Experience

## Driving Our Digital Transformation: We Outperform the Market

### Sales in Action Field<sup>1</sup> (€)



<sup>1</sup> Based on mid-term IHS light vehicle production (LVP) forecast from November 2020

<sup>2</sup> Mid-term organic sales growth above IHS LVP

#### Further growth in system integration

##### Related HPCs

- › Cockpit HPC



##### Related Cabin Sensing

- › Camera and Sensors



#### Further growth in software and systems

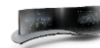
##### Software and Systems

- › 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



# User Experience

## What Makes Us Successful: Leading in All Four Core Competences

TODAY

### DESIGN



Flat 2D displays

### TECHNOLOGY



Separated devices

### INTERACTION



One-way communication

### INTEGRATION



Stand-alone HMI<sup>1</sup> controllers

TOMORROW

- › Large displays, 3D
- › Interactive “Shytch” surfaces

Integration of features into display solutions

Perfect networking of all UX components

High-performance computers connect domains and enable holistic UX

<sup>1</sup> Human Machine Interface



# User Experience

## Creating Uniqueness Through Design

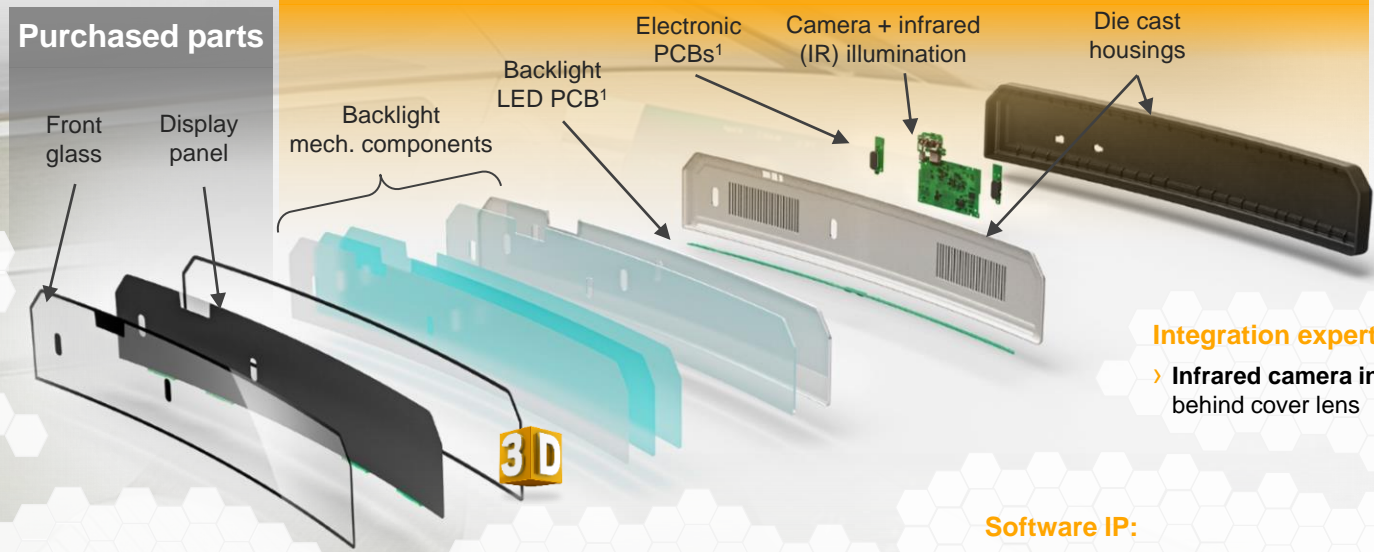


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# User Experience

We Integrate Innovative Features Increasing Our Value

## Own hardware value creation and refinement by Continental



### 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:

- › New **backlight technology**
- › Enabling **natural 3D** experience

### Integration expertise:

- › **Infrared camera** integrated behind cover lens

### Software IP:

- › **Camera eyeball tracking**
- › **3D display content**
- › **UX software**

¹ PCB: Printed Circuit Board

# User Experience

We Orchestrate the "One" Holistic Experience



Interaction



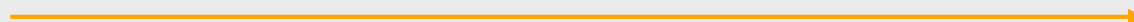


Integration

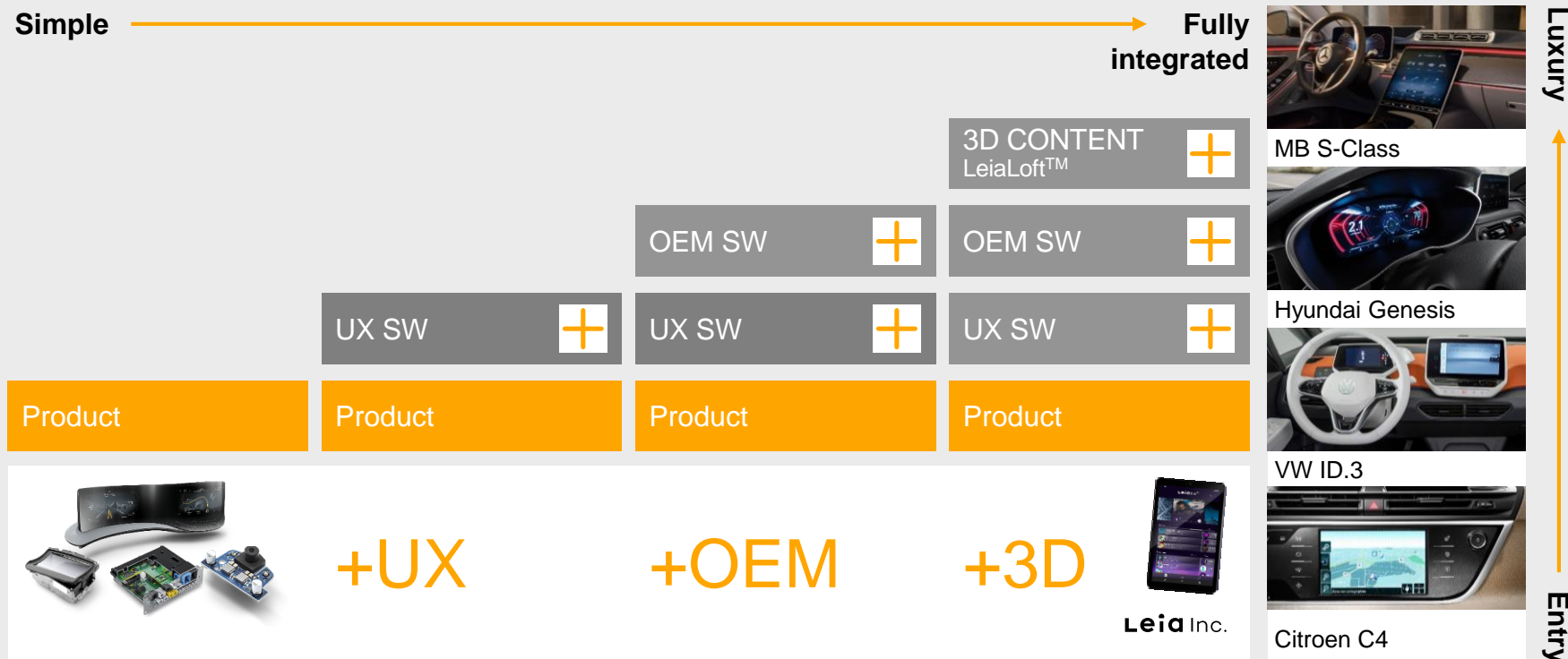
# User Experience

## Simply Scalable

Simple



Fully integrated



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# 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



Cabin Sensing, Health, Wellbeing



Augmented Reality



Driver Monitoring



3D Transparent Hood

# User Experience

## Augmented Reality Head Up Display



Integration

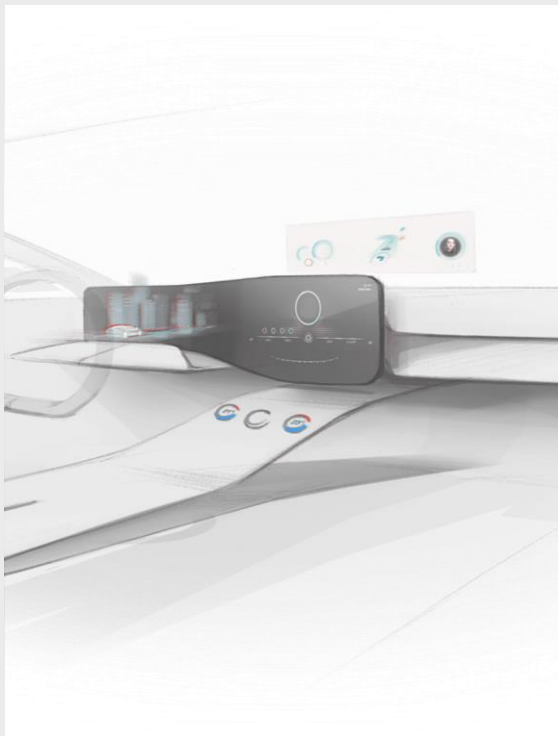


### Synergy Example

UX, Architecture, Safety,  
SW Excellence and  
Autonomous Driving

# User Experience

We Drive the Trends, Growth, at Scale



DESIGN



**We bring home the awards.**

TECHNOLOGY



**We lead the technology.**

INTERACTION



**We orchestrate the "One" holistic experience.**

INTEGRATION



**We make the innovations happen.**

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The Future in Motion