



*Logitech Recognized for*

**2021**

**Market Leadership**

Global Video Conferencing

Devices Industry

*Excellence in Best Practices*

## Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Logitech excels in many of the criteria in the video conferencing space.

AWARD CRITERIA	
Growth Strategy Excellence	Technology Leverage
Implementation Excellence	Price/Performance Value
Brand Strength	Customer Purchase Experience
Product Quality	Customer Ownership Experience
Product Differentiation	Customer Service Experience

### *Staying a Step Ahead in a Fast Changing Environment*

Businesses of all sizes are embracing hybrid work that allows employees the choice and flexibility to work from any location. The resulting mass adoption of modern communications and collaboration tools has redefined the future of work. Video conferencing and cloud services are among the top technologies that have accelerated these transformative trends allowing users to stay connected, while enabling business continuity for new, agile ways of work.

Frost & Sullivan research estimates that the post-pandemic number of remote workers will be 6-7 times greater. This is supported by key findings from a global survey conducted by Frost & Sullivan of more than 3200 IT decision makers:

- 93% expect a quarter or more of their employees to work from home
- 31% will move to a more distributed and dispersed organization
- 36% will invest in building more meeting spaces
- 88% will deploy video conferencing across their organization to support new work style

As technology continues to reshape work, Logitech—one of the world’s largest hardware companies—is uniquely positioned to benefit from emerging hybrid work trends. Logitech’s vast and continually expanding portfolio of high quality audio, video and content sharing devices are allowing users to

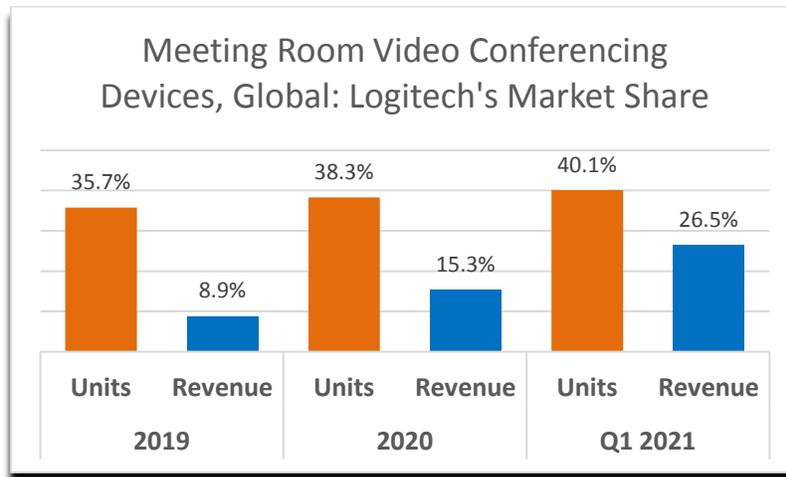
*“In Q1 2021, Logitech surpassed its closest competitors to become the number one vendor in revenue market share in the business-use video conferencing devices market. This was the communication giant’s first time reaching that milestone. Logitech has long dominated the video conferencing devices market in unit shipments. Its recently earned revenue leadership position is a further testament to its unique design-led approach that focuses on creating meaningful products with a clarity of purpose and clear benefits to the users in delivering simple, effortless communication experiences.”*

**- Roopam Jain, Senior Industry Director, Connected Work**

communicate and collaborate better from anywhere - home, office, or remote location.

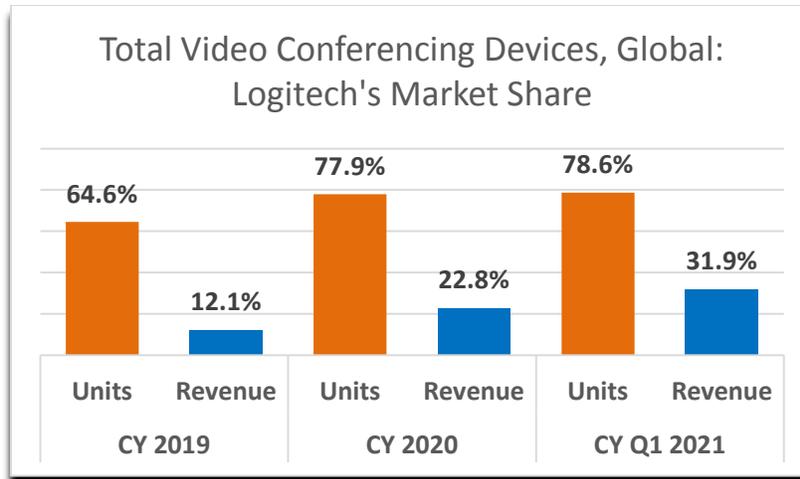
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Today, video collaboration has become a runaway success story and a big growth opportunity for Logitech. In calendar year 2020, Logitech delivered the best year in its history of selling video conferencing devices.



Source: Frost & Sullivan

Note: Excludes Logitech’s consumer webcams. Webcams for business use such as Logitech Brio, C930e, and C925e are also excluded.



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Note: Excludes Logitech’s consumer webcams. Webcams for business use, such as Logitech Brio, C930e, C925e, and Logitech’s conference cam line are included.

Logitech’s meteoric rise in videoconferencing devices has put it at the top in terms of market shares. The company has reported that its video collaboration segment revenue almost tripled in fiscal year 2021 to over \$1 billion for the first time. In fiscal Q4 2021 alone, video collaboration sales were more than what the company did in all of fiscal year 2020. Logitech has emerged as a clear front runner in a market that has tremendous growth potential and represents a secular growth opportunity driven by the long term, sustainable demand for video meetings to connect remote workers and dispersed teams.

- In Q1 2021, Logitech is the number one market share leader in revenue and unit shipments in the meeting room as well as business-use personal video collaboration devices market.
- In unit terms, the company sells twice as many meeting room devices and 15 times as many business-grade personal collaboration video conferencing devices as its nearest competitor.
- Revenue from meeting room video conferencing devices almost doubled in calendar year 2020 to reach \$407.10 million while units grew at an impressive 67.4%.
- Sales of total videoconferencing devices (business webcams plus conference room cams) were up a whopping 151.2% in units and 128.9% in revenue.

### ***Superior Technology Leverage and Competitive Differentiation***

Logitech’s mission of putting video in every space and within every user’s reach has guided its approach to product development and its price/performance leadership. Today, Logitech holds a unique position in the market offering a comprehensive portfolio of devices that fully capture the exponential growth opportunities for meeting room collaboration as well as personal communications.

Since its early days, Logitech has been focused on changing the status quo in video conferencing. Video conferencing usage in the past was dependent on hardware-intensive, expensive, and complex endpoints and infrastructure solutions. As a result, adoption was limited to a select number of board rooms and meeting spaces. Logitech’s lightweight, high-quality devices and an extensive line of conference cams and collaboration bars that run over connected cloud services opened up video

communications to the masses. Logitech products have become a hallmark for frictionless user experiences while being affordable to deploy in every meeting space – meeting pods, huddle spaces, small rooms, and mid to large conference rooms.

Logitech video devices work with virtually any UC or video collaboration cloud service offering a plug and play functionality. While much of Logitech’s competition has been focused on dedicated room videoconferencing endpoints, Logitech’s approach is based on allowing businesses to choose from a wide, curated portfolio of solutions certified for leading cloud services that fit every user and situation, whether employees are working at home, in the office, or at a hot desk:

- Robust Personal Collaboration – Logitech’s fast growing suite of personal workspace solutions enables seamless remote work. A wide choice of headsets and business webcams ensure that employees can work flexibly anywhere in the world without compromising on their communications experience.
- BYOD Rooms– Logitech’s comprehensive line of standalone conference cams allows users to initiate a video meeting over their laptop/mobile device using a soft client of their choice. This option is aligned with the growing consumerization of IT.
- PC-based Rooms Optimized for Group Meetings – Logitech recognizes that while the BYOD approach is effective in many cases, there are several technology elements that need to be carefully considered including dedicated in-room compute, cabling, room logistics and design. Logitech has recognized this challenge and has collaborated with several technology partners to create the optimal conference room bundles for meetings rooms of different sizes.
- All-in-one Appliances – Logitech’s video bars are dedicated video conferencing devices with built-in compute and a robust feature set and capabilities for all in one simplicity and manageability.

### *Innovation that Keeps Pace with Changing User Needs*

Over the past few years as Logitech’s video collaboration business has gone from strength to strength, it has not rested on its laurels. The company continues to solidify its product portfolio and has invested across many areas of hardware and software innovation. Moreover, its decades-long expertise in key engineering disciplines such as sensors, acoustics, optics, wireless, and power management is a core competitive advantage. In recent years, Logitech has extended its engineering capabilities into more advanced technologies such as software, apps, cloud, data analytics, AI and machine learning.

Among its most recent market-changing product introductions are:

- Rally Bar and Rally Bar Mini– A new portfolio of solutions that marks Logitech’s entry into the appliance space. Natively integrated with today’s leading video conferencing services, such as Microsoft Teams and Zoom, these all-in-one video bars offer a streamlined experience for procurement, manageability and ease of use. By consolidating all components into a single device, this turnkey approach brings a new elegance and power into meeting rooms to enable greater intelligence, analytics, and admin controls while eliminating additional costs associated with complex installation and support for multiple components leading to a significantly

improved ROI. The new Logitech Rally Bar is purpose-built for mid-sized rooms while Logitech Rally Bar Mini is ideal for small rooms.

- Logitech RoomMate – Designed for large meeting rooms, RoomMate is a computing appliance that allows customers to run video conferencing services on Logitech conference cams like Rally Plus or MeetUp without a PC or Mac.
- Logitech Scribe - An AI-powered whiteboard camera, Scribe addresses the growing need for more equitable meeting experiences for remote participants that want a crisp and clear view of whiteboard content during brainstorming, teaching, and team meetings. With its simple design and enhanced integrations with Microsoft Teams Rooms and Zoom Rooms, Scribe levels the playing field for distributed teams giving everyone— in-room or remote—a perfect view of the board.

All of Logitech’s video collaboration devices are enhanced by its Ultra HD 4K cameras that deliver premium video quality, Ultra low distortion speakers for rich, natural audio, and its intelligent software suite of Logitech RightSense™ technologies. This suite of technologies leverages the latest developments in AI to automate light, color, sound, and camera control to deliver a more natural and engaging video conferencing experience. Logitech also offers cloud-based real time monitoring and management via Logitech Sync, including people count functionality and insights about each meeting room. In addition, open APIs for Sync allow customers to have centralized, cross-platform solution monitoring, management and analytics of devices from a growing partner ecosystem.

### **Industry Leading Design Focused on Simplicity and Usability**

*“Logitech’s design-led approach and culture has become a strategic and cultural differentiator for the company. A keen eye on the subtlest of details makes Logitech’s products likeable, personal and easy to use.”*

**- Roopam Jain, Senior Industry Director, Connected Work**

According to Logitech, “Every new Logitech product is about building, not just a product, but an experience, in which the designers and marketers think about the approach together.” This design-led approach and culture has become a strategic and cultural differentiator for the company. A keen eye on the subtlest of details makes Logitech’s products likeable, personal and easy to use. Logitech owns a diversified patent portfolio. Its products have won 127 design awards during the past three fiscal years for well-designed ergonomic products. During fiscal year 2021, the company won 23 design awards.

Logitech has been focused on finding better ways to do business that are sustainable for the planet and society. In 2019, the company joined the Paris accord and in 2020 it announced a big move to recycled plastics. In Q1 2021, Logitech announced the availability of carbon label products. Logitech believes that just as calorie labels have impacted the food industry, carbon labeling is a step forward to reduce global carbon output. In the process, Logitech has developed a life cycle analysis methodology to measure a product's carbon impact from its raw materials to its manufacturing and transportation to use by the customer and then finally to the end of life. Logitech is sharing its learnings and third-party certified methodology for carbon labeling with any company and competitor at no charge.

### ***Rapid Go-to-market Expansion***

Logitech has built a strong brand in the communications industry. Today Logitech's distribution network is growing beyond its massive online and offline retail and distribution channels. As it increases investments in video collaboration, Logitech is expanding its enterprise sales coverage through its own sales force as well as various new and emerging channel partners. Unlike many of its competitors, Logitech has established itself as a neutral technology supplier that can work with a variety of technology vendors and platforms as well as provide connections among their products and ecosystems.

The company's success is in large part due to its well differentiated go-to-market strategy of partnering with the best distribution and technology partners in the industry. The Logitech Collaboration Program (LCP) is a fast growing ecosystem of leading technology providers, including Microsoft, Google, Zoom, Ringcentral, Pexip, LogMeIn, Blue Jeans, and Fuze among others. This growing ecosystem of UC partners ensures that customers get access to open communication solutions that work with leading cloud providers and third party software. With 40 plus partners that provide complete solutions, LCP features two tracks—one for cloud video conferencing providers and one for complementary solutions. The members include a broad ecosystem third-party companies that optimize product functionality with Logitech devices to enhance the user experience and technology deployment while allowing for integration with business workflows and processes.

### **Conclusion**

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In an increasingly competitive market, Logitech has earned the leadership position through its focus on simple, high-quality design principles that are aligned with the changing needs of today's workforce. Its market leading innovation combined with user-friendly and easy to procure high-quality video communication devices are successfully enabling video communications for all in the hybrid workplace. For these reasons, Frost & Sullivan is proud to present the 2021 Market Leadership Award to Logitech for its efforts in the global video conferencing devices market.

## What You Need to Know about the Market Leadership Recognition

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Frost & Sullivan's Market Leadership Award recognizes the company that achieved the greatest market share resulting from outstanding performance, products, and services.

### Best Practices Award Analysis

For the Market Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

**Growth Strategy Excellence:** Company demonstrates an ability to consistently identify, prioritize, and pursue emerging growth opportunities

**Implementation Excellence:** Company processes support efficient and consistent implementation of tactics designed to support the strategy

**Brand Strength:** Company is respected, recognized, and remembered

**Product Quality:** Products or services receive high marks for performance, functionality, and reliability at every stage of the life cycle

**Product Differentiation:** Products or services carve out a market niche based on price, quality, or uniqueness (or some combination of the three) that other companies cannot easily replicate

**Technology Leverage:** Company is committed to incorporating leading-edge technologies into product offerings to enhance product performance and value

**Price/Performance Value:** Products or services provide the best value for the price compared to similar market offerings

**Customer Purchase Experience:** Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

**Customer Ownership Experience:** Customers are proud to own the company's product or service, and have a positive experience throughout the life of the product or service

**Customer Service Experience:** Customer service is accessible, fast, stress-free, and of high quality

