

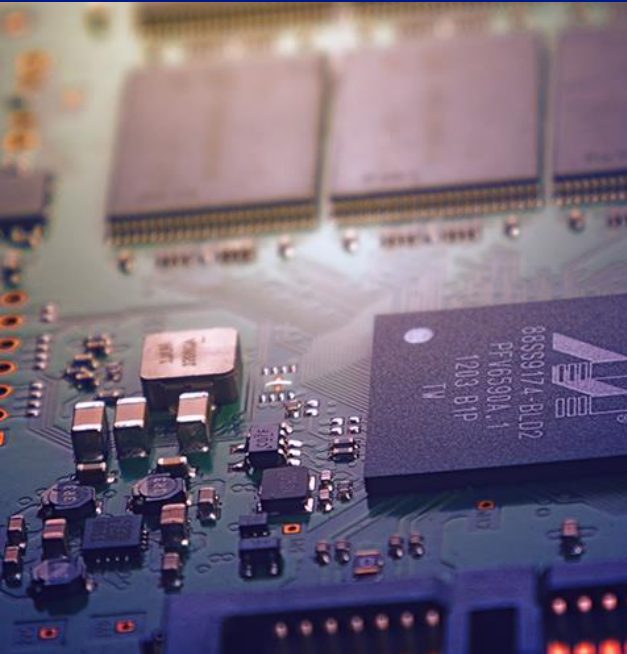
Value creation in a complex world
CES 2019, Las Vegas

Patrick Koller, Chief Executive Officer



Four megatrends disrupting the automotive industry

CONNECTED



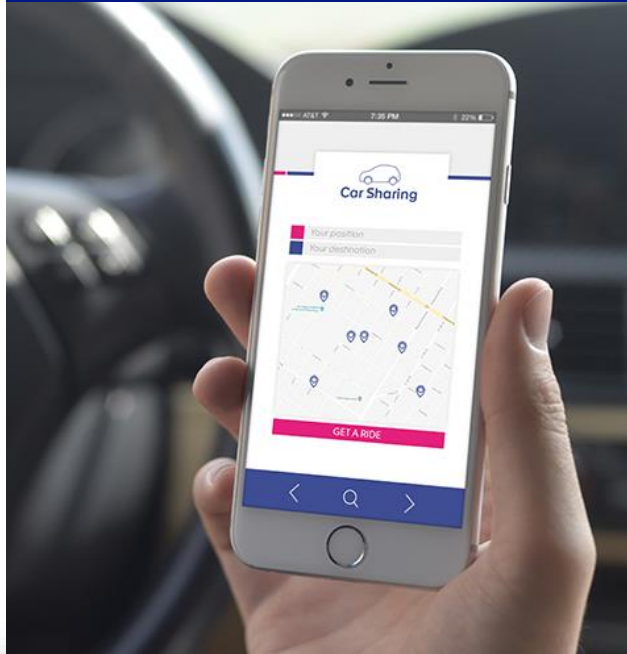
New electronic architecture and new technology players

AUTONOMOUS



Creating new user experiences

RIDE-SHARING



New business models and new actors

ELECTRIFIED



Powertrain mix moving rapidly towards increased electrification

Four societal trends creating new markets

MILLENIALS



From the focus to the car
to the focus on mobility

AGEING



Life expectancy
increase

URBANISATION



Rapidly rising urban
populations

Asia



Growth leadership

Four consumer priorities creating new mobility business models

FREEDOM



Mobility whenever
and wherever wanted

AFFORDABILITY



Affordable mobility
for all

SAFETY & SECURITY



No compromise: trust is key

TIME



Individualized and
effective time
management

Towards a complex world

FROM A COMPLICATED WORLD

- Independent actors
- Predictable consequence of action
- Simple governance



LINEAR DEPLOYMENT
of strategy towards vision



TO A COMPLEX WORLD

- Interdependence of actors
- Unpredictable consequences of action
- Ecosystem governance



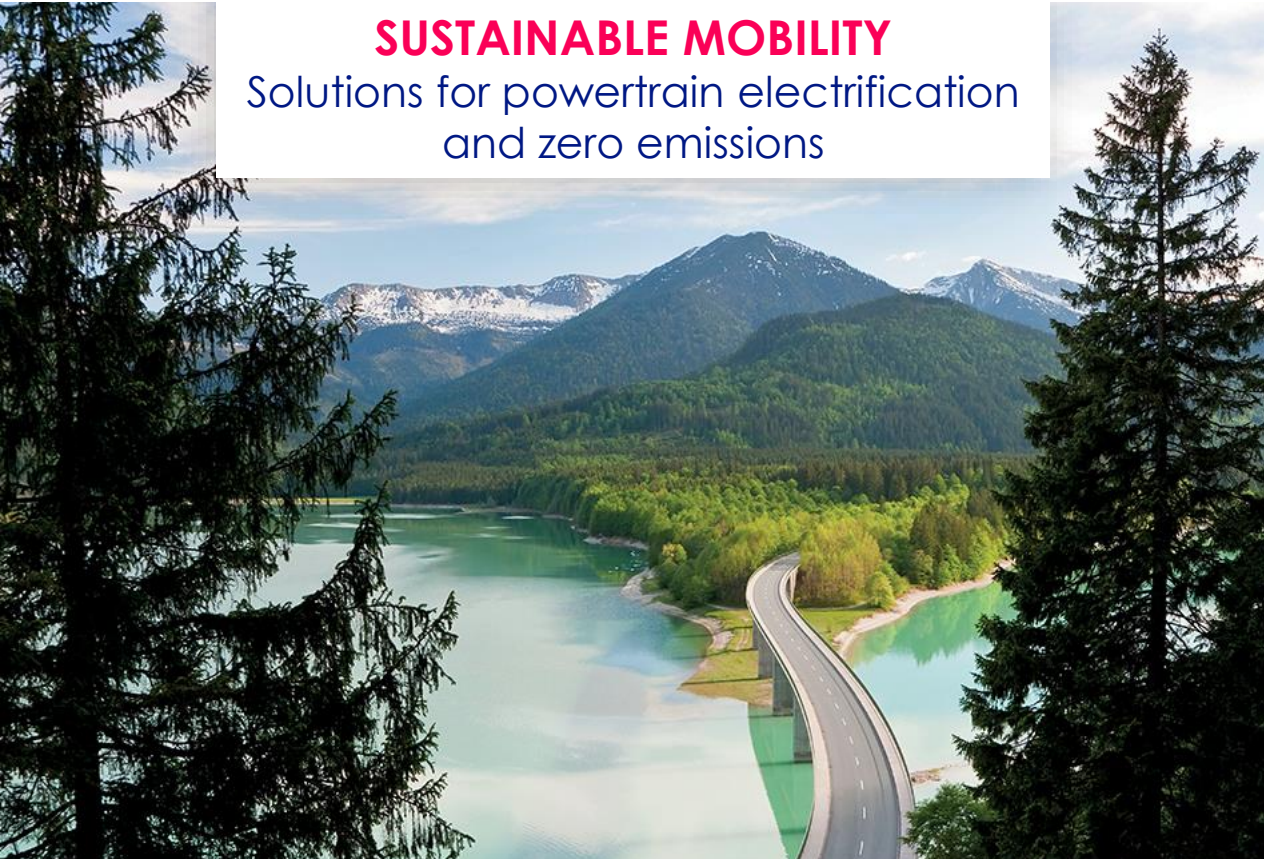
NON-LINEAR DEPLOYMENT
of strategy towards vision:
NEED FOR AGILITY

Strategy for a complex world

Alignment with megatrends

SUSTAINABLE MOBILITY

Solutions for powertrain electrification
and zero emissions



ADDRESSABLE MARKET

€51 bn in 2030

COCKPIT OF THE FUTURE

Solutions for a connected, versatile
and predictive cockpit



ADDRESSABLE MARKET

€81 bn in 2030

New consumer insight tools use artificial intelligence across the product life cycle

IDEATION &
STRATEGY

FEATURE
PRIORITIZATION

PRODUCT
DEVELOPMENT

SERIAL LIFE

Social Media Listening



- A.I.-Powered
- Natural Language Processing
- Image Analytics
- Neural Networks

Consumer Video Processing



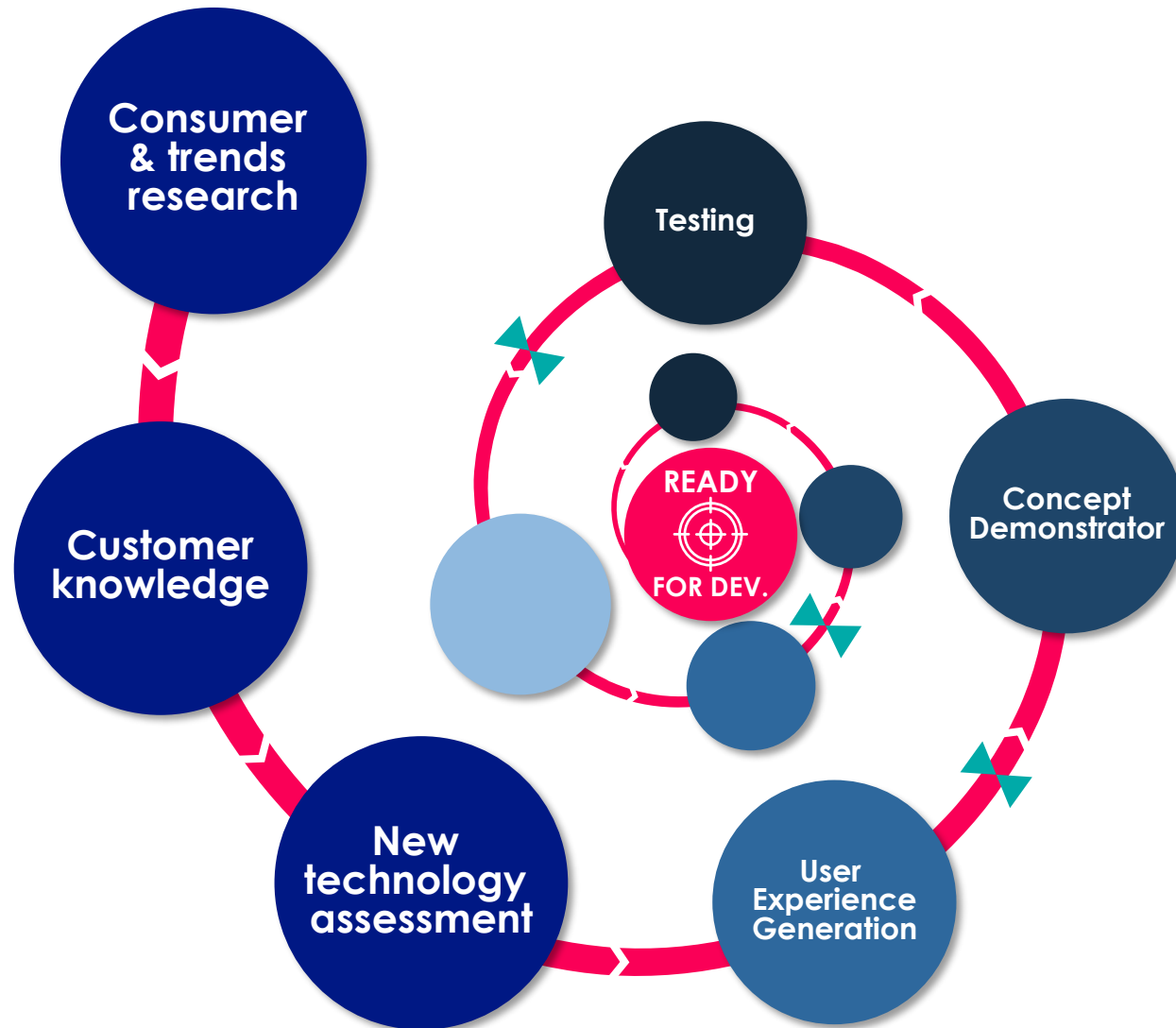
- Sentiment Analysis
- Video Analytics
- Time-Coded Transcription
- Keyword Mapping

Digital Consumer Surveying

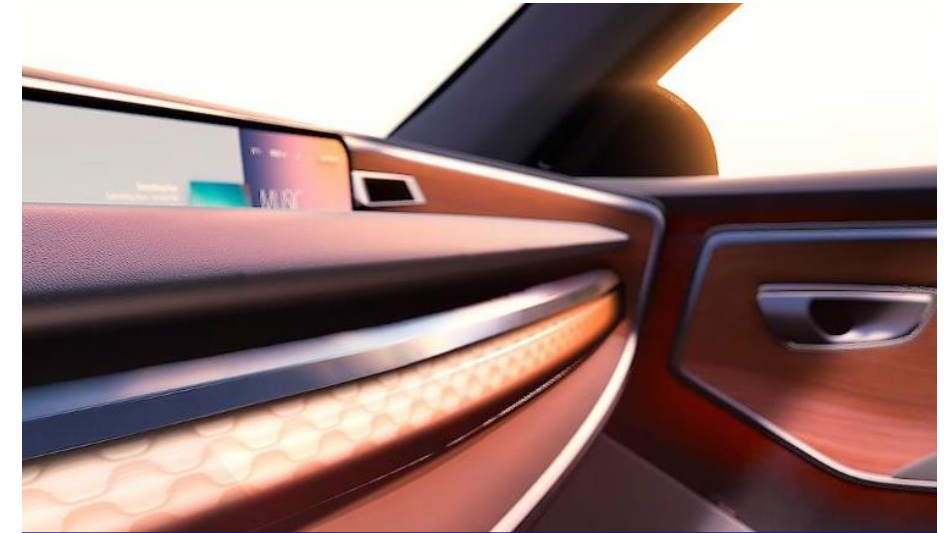


- Measure Experiences
- Track Behavior
- Machine learning
- Pattern Recognition

Consumer & customer & technology understanding drive development process



Faurecia UX process success factors

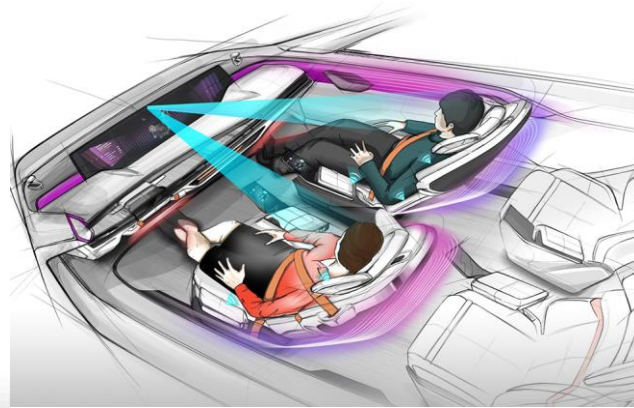


- Agile and Iterative
- Collaborative
- User-Centric
- Business Driven

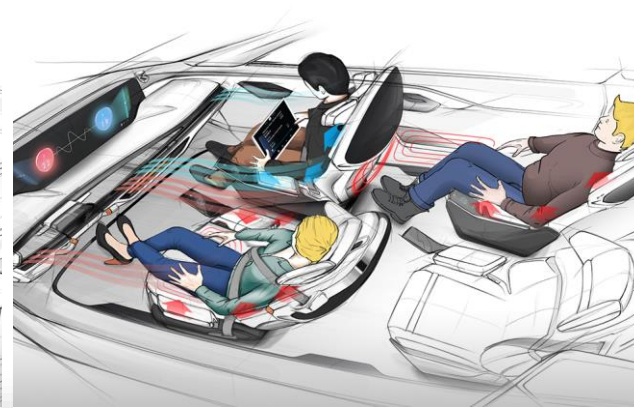
User experiences aligned with consumer trends



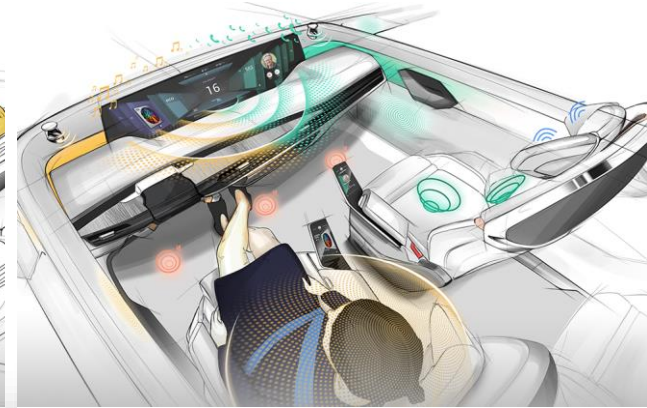
Advanced safety



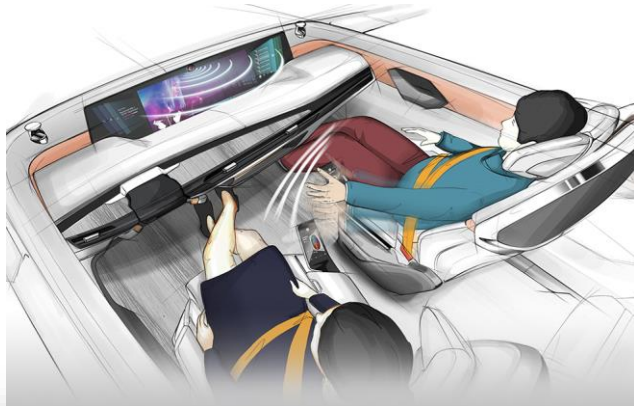
Enhanced comfort and wellness



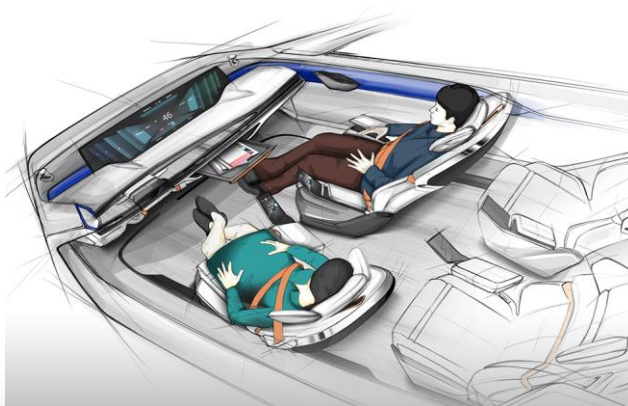
Personalized climate comfort & air quality



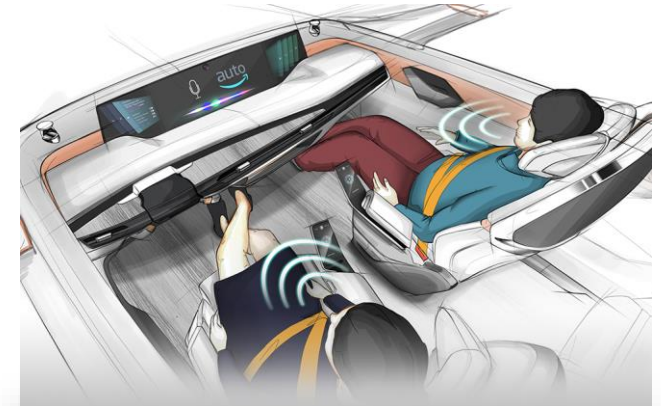
Immersive sound experience



Intuitive HMI solutions

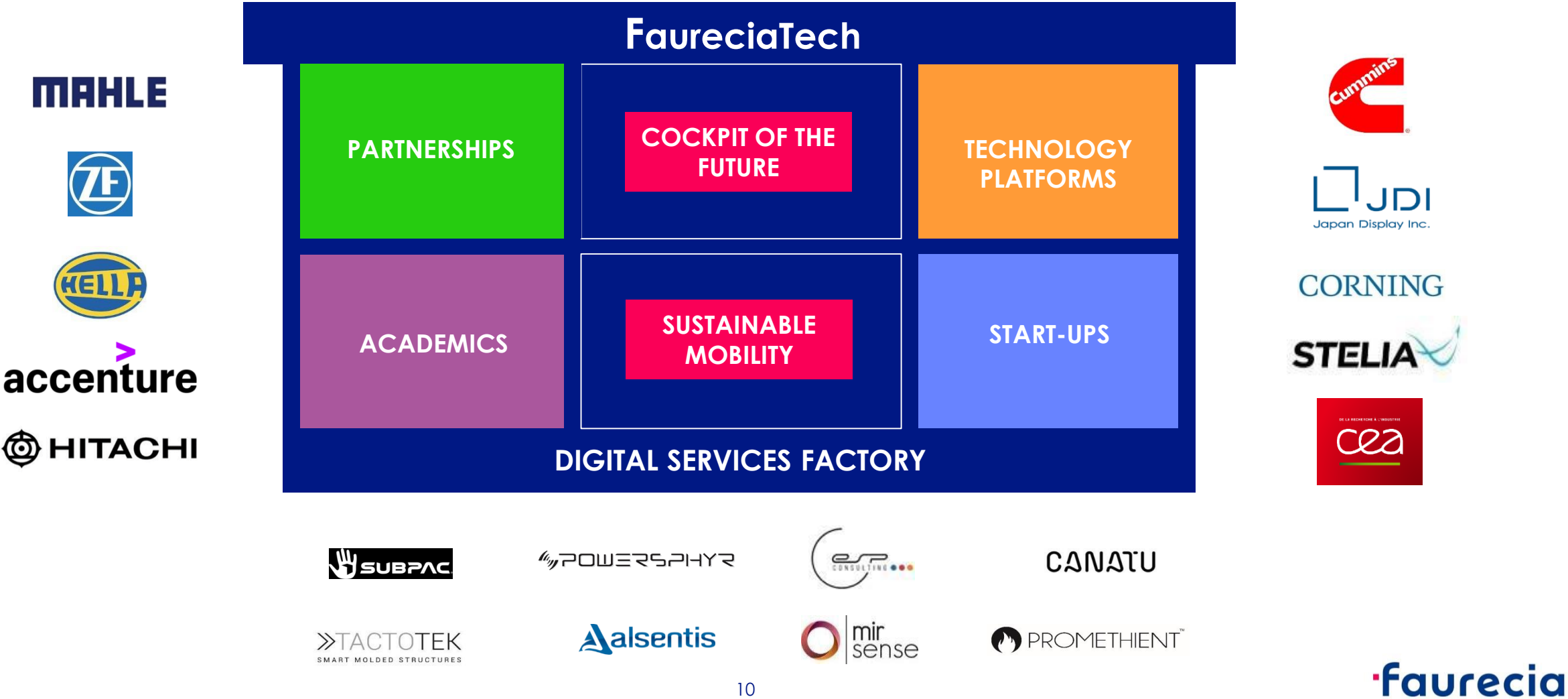


Adaptive cabin



Cloud-based services

Organization and ecosystem for agility and time to market



Towards the vision though short-term solutions

Consumer



Customer



Technology



“Triple win” systems for new user experiences



Smart hardware ready for sale today



Seat structures



Smart Surfaces



Occupant Monitoring



DecoVent



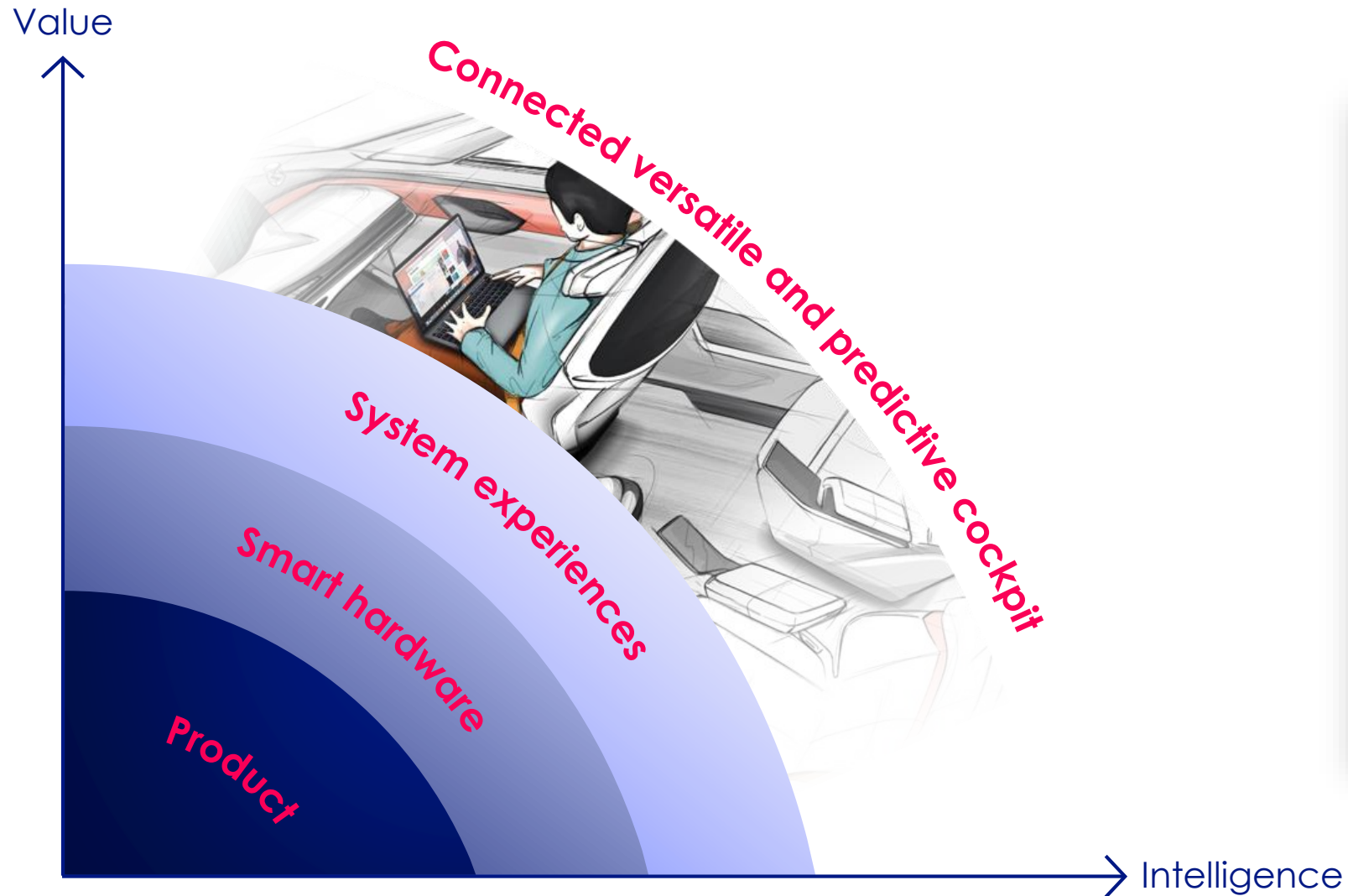
XL displays



...

- New **EV customers** early adopters of technology
- **17** development contracts
- **20** business awards
- With **22** customers
- Target **€4.2** billion in 2025

From smart hardware to system experiences leveraging AI



- Increase of content per vehicle by over 50%
- New market segments and new customers
- Towards a B2C business model

Sustainable value creation in a complex world

- Consumer, customer & technology centric to drive user experiences
- Work with broad ecosystem
- Towards the vision through short-term solutions
- Affordable technology: triple win strategy
- From product to experience for increased content per vehicle

TECHNOLOGY WITH A PURPOSE

