

FROST & SULLIVAN

XPERI INC.

2022
COMPETITIVE
STRATEGY
LEADER

*NORTH AMERICAN CONNECTED CAR
IN-CABIN MEDIA INDUSTRY*

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. Xperi excels in many of the criteria in the connected car in-cabin media space.

AWARD CRITERIA	
<i>Strategy Innovation</i>	<i>Customer Impact</i>
Strategy Effectiveness	Price/Performance Value
Strategy Execution	Customer Purchase Experience
Competitive Differentiation	Customer Ownership Experience
Executive Team Alignment	Customer Service Experience
Stakeholder Integration	Brand Equity

Competitive Edge through Unique Strategies

Headquartered in San Jose, California, Xperi and its brands and partnerships offer a diverse technology portfolio across consumer electronics, connected car, and entertainment product solutions. Their track record across industries includes more than 35 years of cumulative experience. In 2021, Frost & Sullivan

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**-John Sisemore,
Best Practices Research Analyst**

recognized Xperi for its uncompromising addressing of unmet customer needs in the evolving Internet of Things and artificial intelligence in-vehicle space, praising the company for its advances in its in-cabin monitoring solutions designed to recognize distracted or impaired driving and pets and children left behind in a hot car. Frost & Sullivan remains impressed with the company's continuing innovation and sustained leadership.

Xperi has expanded its product line and patent portfolio in recent years. Solutions for radio, audio, video, imaging, content, and metadata are part of the company's already extensive catalog.

Foresight with Insight: Knowledge Breadth, Strategic Depth

Xperi's Pay-TV solutions leverage an award-winning TiVo® service which allows for simple integration, flexible deployments, and scalability. The consumer electronics leg of the Xperi table flourishes across many company verticals, such as IMAX® Enhanced, DTS Play-Fi®, DTS:X®, DTS Clear Voice™, and DTS Headphone: X®. The company is also growing the IMAX® Enhanced product through enhanced

entertainment experiences. Xperi's connected car group delivers a fully immersive connected media platform and in-car safety provided through its in-cabin sensing solution portfolio. Moreover, from the automotive industry perspective, this gives Xperi a particular set of tools that put the company in a leadership position in interior experience innovation. Because of its foundation with decades of experience with in-vehicle infotainment, Xperi offers one of the most complete and immersive entertainment experiences in the automotive space. The DTS AutoStage™ solution is one-of-a-kind and draws on Xperi's product line's most cutting-edge technologies. This technology includes the company's worldwide radio and audio knowledge, its video proficiency (TiVo), DTS AutoSense™ in-cabin sensing, extensive portfolio of DTS® audio solutions and video/music metadata¹.

A Foot in the Present and an Eye on the Future

Xperi's mission is to deliver extraordinary experiences in the home and on the go. This mission encompasses offering a content-first experience with a streamlined interface for all media types identifying and fulfilling customers' needs. Continuous technology development and expansion efforts improve existing products and pave the company's infotainment roadmap. In 2022, the company further strengthened its value proposition and commitment to the entertainment space by pledging its dedication to creating the first independent media platform for home and car. Xperi is actively shaping the industry direction via contributions to the Experience per Mile Advisory Council, EuroNCAP, National Association of Broadcasters PILOT (technology program), and United States Department of Transportation, and is aligning products and quality to meet specific automotive requirements for a quality management system via its ISO9001 certification.

Positioned for Growth

Xperi taps into available growth opportunities by engaging its 2,000+ employees worldwide and leveraging more than 20 years of experience working in the automotive industry. The company has a reputable history with infotainment in HD Radio and has become the digital radio broadcast standard in North America. Xperi's radio broadcasting technology portfolio services more than 10,000 stations worldwide. The company bridges the gap between the broadcast and automotive industries by drawing on both and meeting their respective needs and requirements for product development. Xperi's music metadata solution is unmatched, with top tier media and streaming service companies licensing it. With more than 30 million households served and providing more than five billion hours of content a year, its competence in cross-media metadata, personalization, and recommendation is unparalleled.

Frost & Sullivan believes Xperi is uniquely prepared for today's demands and exceptionally positioned for tomorrow's needs. The company's clear strategic vision and execution underpin its partner of choice status and sustainable growth for years to come.

Continuous Enhancement

Xperi is unique in the entertainment delivery space and possesses many key differentiators from its competitors. In connected car entertainment, the company uniquely offers a combination of imaging, audio, and video solutions to create comprehensive products that original equipment manufacturers

¹ <https://investor.xperi.com/news/news-details/2021/DTS-AutoSense-Achieves-ISO9001-Certification/default.aspx>, accessed September 2022

(OEMs) can implement globally. Xperi also launched its independent media platform, TiVo® OS. Consumer electronics leader Vestel will ship the first Powered by TiVo™ smart TVs in Europe beginning in 2023. These Xperi solutions power over 100 billion devices worldwide and will power the next generation of smart TVs, devices, automobiles, and entertainment experiences. The company's products allow businesses to reach highly engaged consumers, uncover incredible new opportunities, and deliver post-sale revenue streams to OEMs.

A Promising Outlook for 2022 and Beyond

To ensure steady growth over the long run, Xperi strives to position its technology portfolio to remain best-in-class. In July 2022, the company announced the acquisition of Vewd Software Holdings Limited ("Vewd"), a leading global provider of over-the-top and hybrid TV solutions that ship in more than 30 million households. This acquisition positions Xperi to leverage Vewd's footprint in the European automotive markets. Vewd and TiVo, another Xperi brand, combined to catapult Xperi as a major video

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solutions provider for cars and homes. The DTS AutoStage™ and Vewd platforms are perfectly complementary. DTS AutoStage™ solutions integrate over the air broadcast with TiVo metadata and personalization to deliver market-leading media discovery experiences on a global scale. Vewd's product portfolio includes content distribution and client experience rendering technologies that deliver a market-

leading client experience. This strategy provides an end-to-end solution that rivals any media and application platform for any market. The result is world-class across the board.²

Conclusion

Frost & Sullivan believes that innovation and growth opportunities drive future success; many factors contribute, yet having a competitive strategy is critical. Xperi understands this core concept and is leading the connected car in-cabin media market due to its focused growth plan utilizing the unique capabilities added to the company through the Vewd acquisition. The combination of TiVo video service platform and Vewd's suite of streaming media solutions establishes Xperi as a leading independent media platform for Smart TVs, connected cars, and video-to-home broadband operators. These strategies help Xperi outpace competitors and provide end-to-end entertainment solutions. With the company offering a unique combination of imaging, audio, and video solutions, Xperi is the digital radio broadcast standard for North America and engages more than 2,000+ global employees to deliver to and meet the needs of customers. Xperi develops and implements its infotainment strategy with its customers in mind, securing its position as a trusted partner and market leader.

With its strong overall performance, Xperi earns Frost & Sullivan's 2022 North American Competitive Strategy Leadership Award in the connected car in-cabin media industry.

² <https://investor.xperi.com/search-results/default.aspx?SearchTerm=vewd>, accessed September 2022

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Award recognizes the company with a stand-out approach to achieving top-line growth and a superior customer experience.

Best Practices Award Analysis

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

Strategy Innovation

Strategy Effectiveness: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

Strategy Execution: Company strategy utilizes Best Practices to support consistent and efficient processes

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Executive Team Alignment: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

Stakeholder Integration: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

Customer Impact

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 proudly 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 high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Engine™

Frost & Sullivan’s proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

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Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

