



tobii dynavox

Trends & Outlook -Assistive Technology for Communication

Fredrik Ruben, CEO

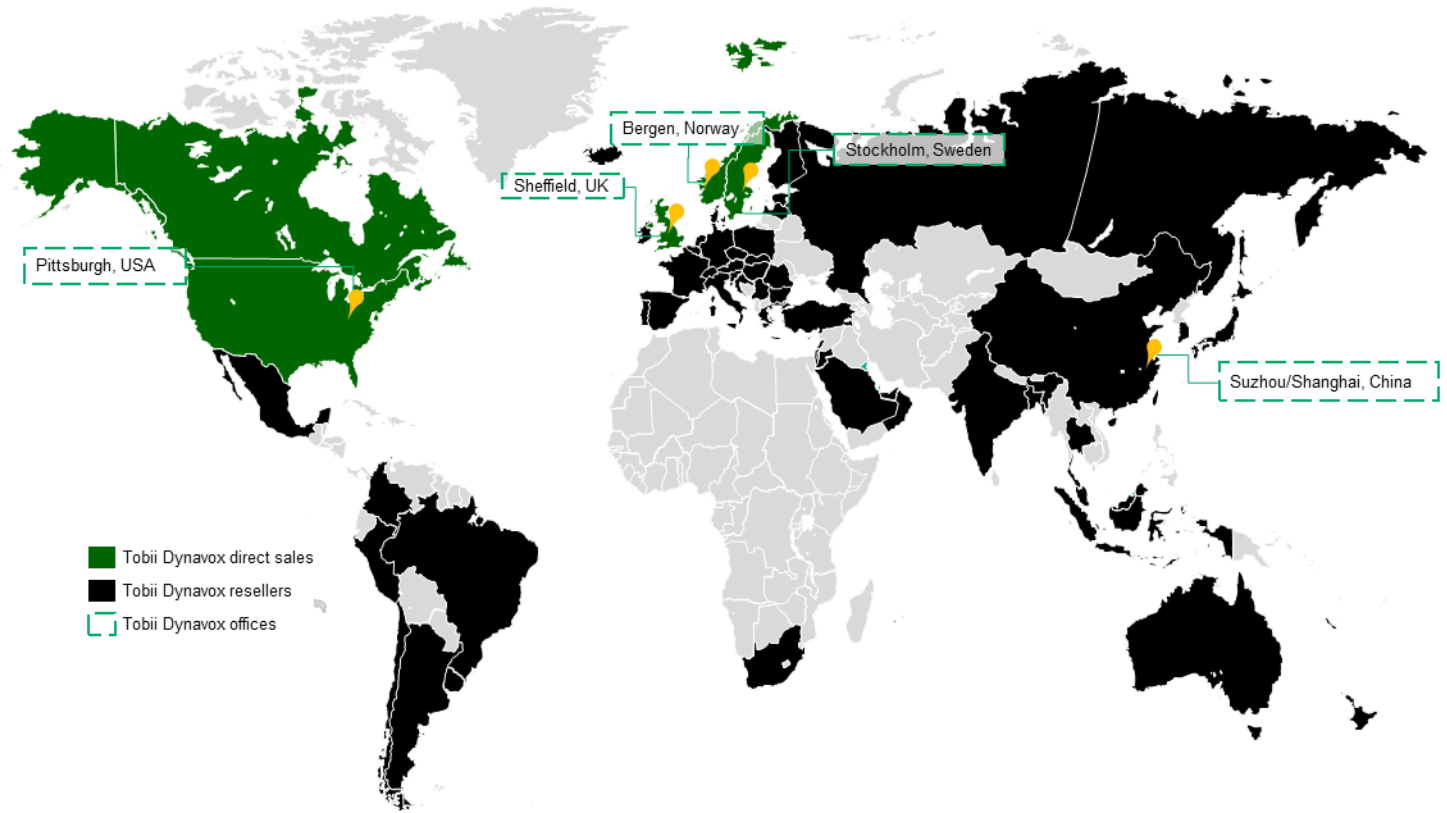


Power to be You

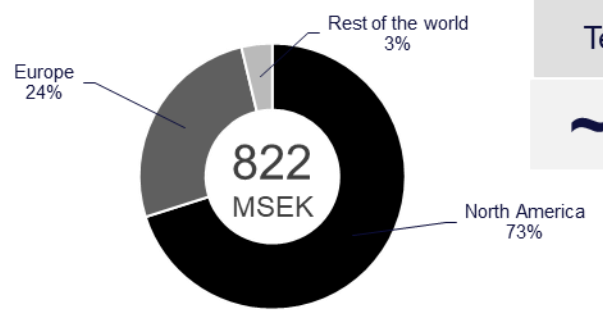
Tobii Dynavox's mission is to empower people with disabilities to do what they once did, or never thought possible.



This is us 2019



SALES BY REGION KEY FACTS



Team size	Market presence (# of countries)	Tobii Dynavox field representatives	Number of partners
~420	65	130	~120

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TOBII DYNAVOX'S ESTIMATES OF THE AAC MARKET

Disclaimer: Numbers are internal estimates for the purpose of discussion only. Not for research or commercial purposes



50_M

50 million people can't speak
(Prevalence)

High level AAC user segmentation

At birth
"Congenital"

Cerebral Palsy



Autism



Acquired
"Progressive"

ALS



Parkinson's disease



"Aphasia"

Aphasia & stroke



Internal estimates, for discussion purposes only

Total incidence

Reachable* incidence

Life expectancy after diagnosis

Total prevalence

Reachable* prevalence

Congenital



450k

80k

> 50 yrs

24M

4M

Progressive



800k

150k

~5 yrs

4M

700k

Aphasia



2M

350k

~12 yrs

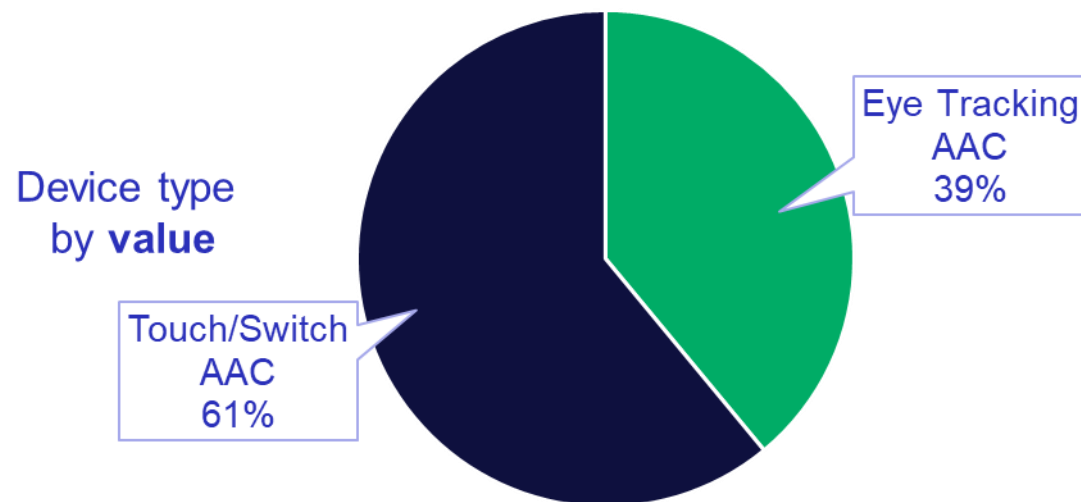
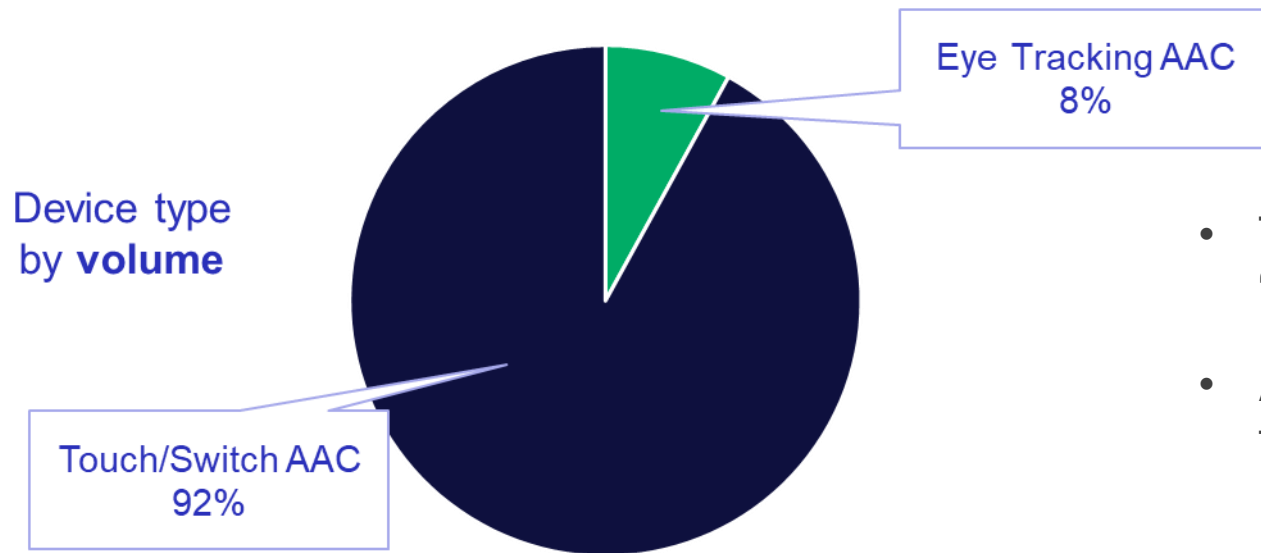
23M

4M

* Users living in a country / part of society where there is funding and societal infrastructure

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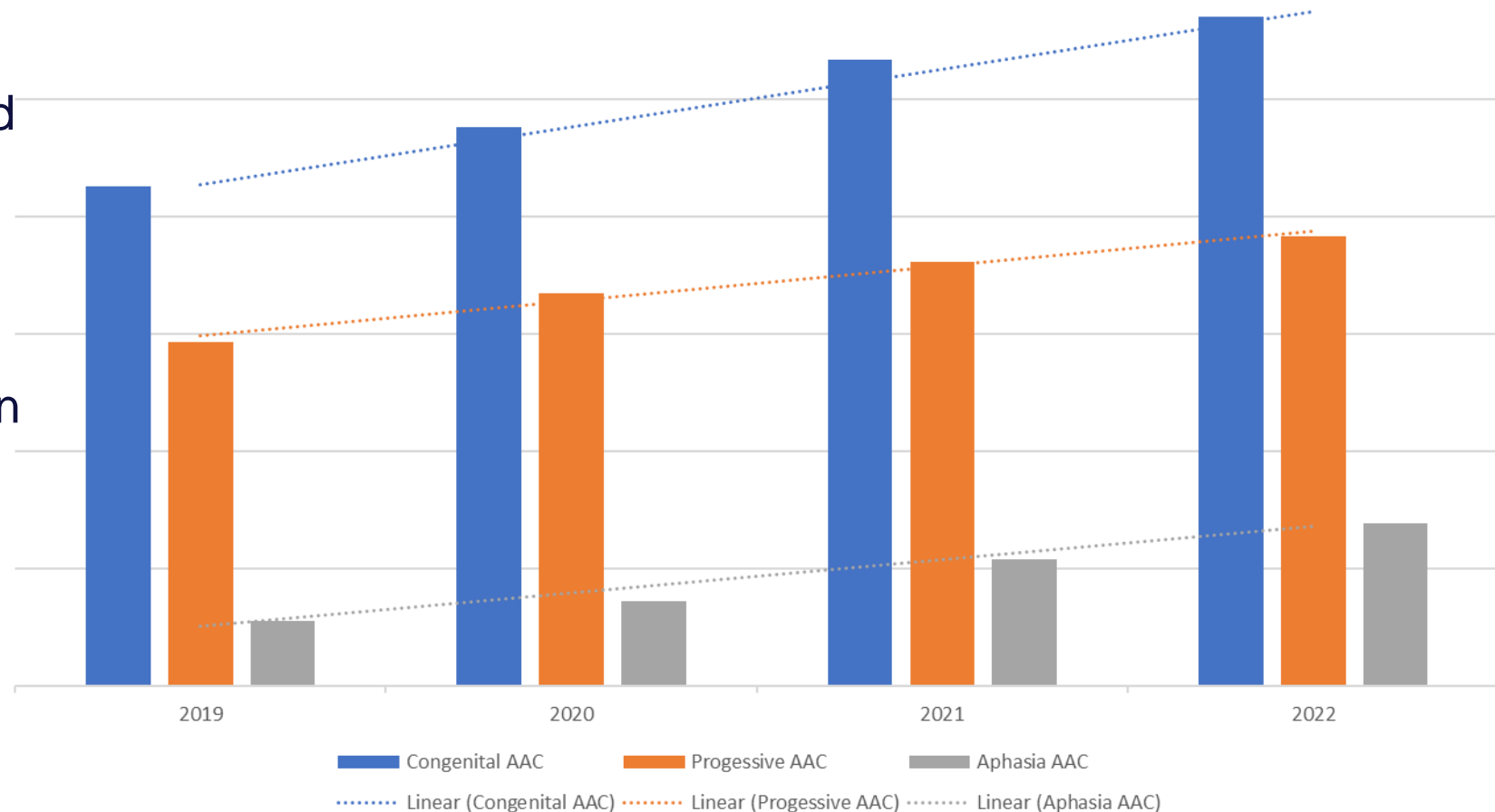
Market size per device type



- Total current market penetration about 8% in the “reachable” geographies
- An estimated 8% of the addressable user need eye tracking as access method
 - 92% can control their limbs well-enough for touch/switch control
- Currently, Eye tracking AAC has a higher ASP, representing almost 40% of market value

Penetration and growth expected in all segments

- Slowly increased awareness, among both professionals and general public
- Slowly improved funding and clinical support
- Mainstream technology becomes “good enough”
- New products and innovation
- ...but still slow, overall market growth only some 10% per year



Having a voice
– a fundamental right, right?



Vs.



It's not just communication...



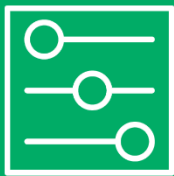
Communicate



Learn



Read & Write



Control things around me

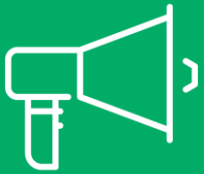


Handle emotions



Interact socially

Five main challenges



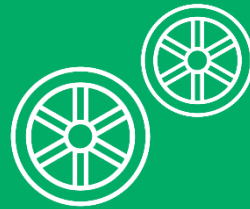
Awareness

- Professionals
- Caregivers & users
- Schools & institutions



Funding

- Complicated
- High cost products
- Value & quality of life



Old school thinking

- "I have done this for years"
- "Computers are bad"
- "Stops natural development"



Tech issues

- Complicated & complex products
- Bugs & poor quality
- Difficult to get help



Abandonment

- Lack of therapy
- Lack of strategy & support
- Wrong expectations

Five industry strategies for success

Share **knowledge** and enable **team-work**. Train everyone around the user for right expectations and sustainable success – not specific products & devices

Mainstream technology used for AAC will become better and cheaper. But will never fully capture specific needs. Must embrace both!

Always strive for literacy. A person that can read and write can conquer the world – on their own. No dead-end roads

“One size fits all” does not work. Specific tools and strategy for each user segment
|Congenital | Progressive | Aphasia

There is an **enormous amount of unmet need**, yet the replacement market for some user segments is already today bigger than the new user market. Ensuring user success is super important!



“Swiss Army” multi tool



Swiss made professional surgical instruments

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THANK YOU