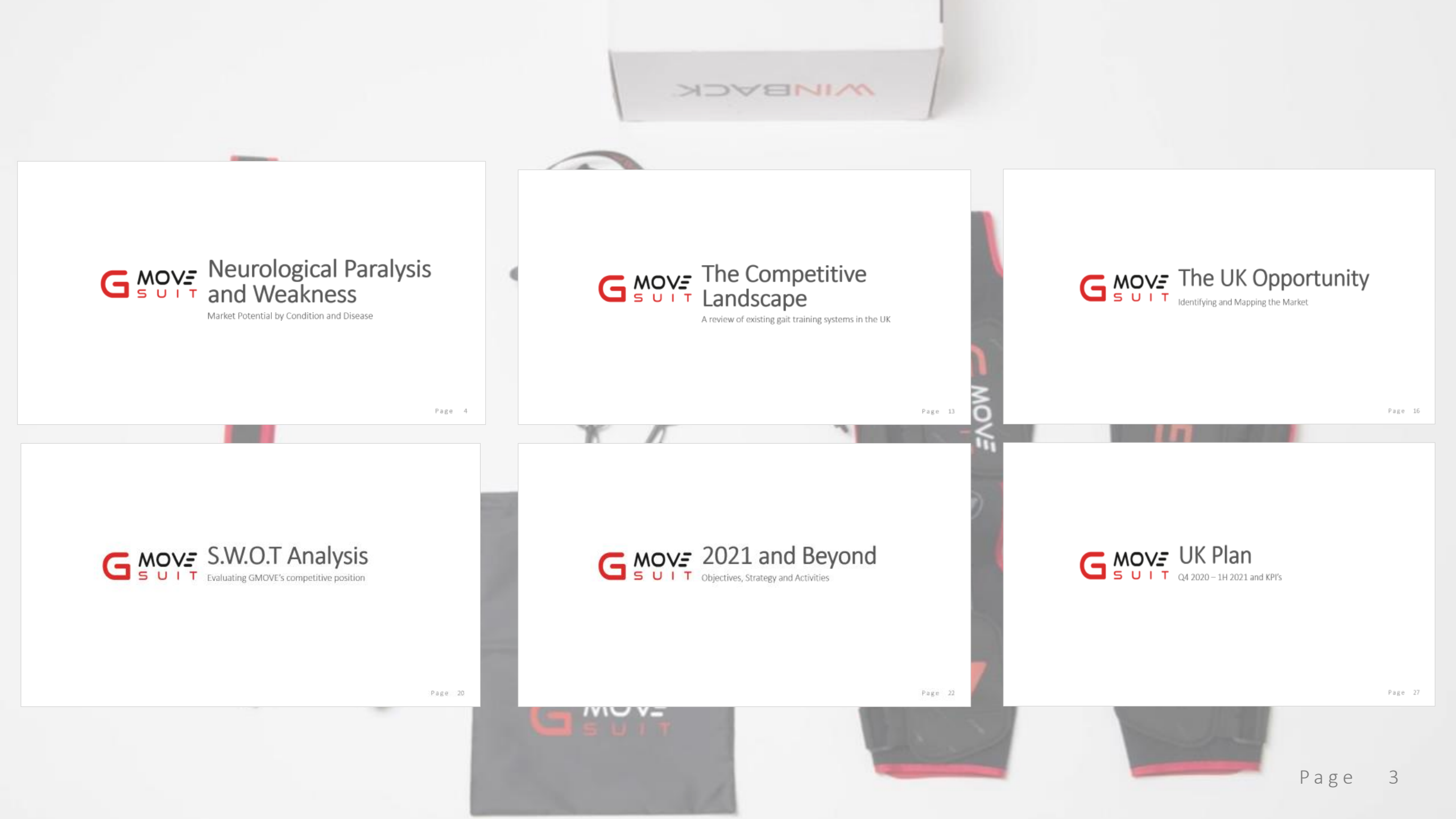
Neurorehabilitation Gait Training in the UK

Establishing the G-Move Suit as the Number One Choice for Clinical and Personal Use.

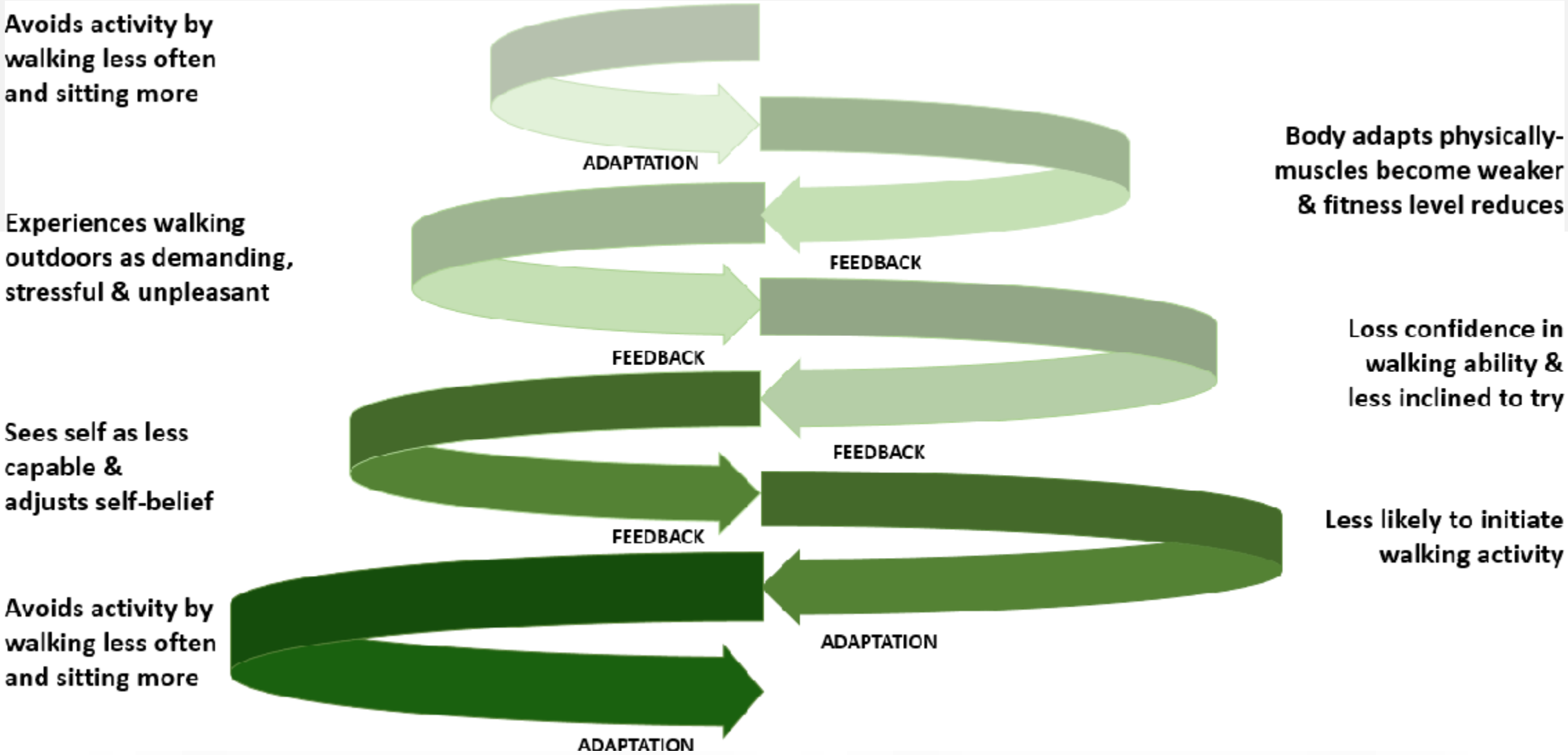
Our **mission** is to re-enable mobility and independence for those suffering from lower limb paralysis and neurological weakness by enhancing strength, endurance, and function through the development of soft exoskeleton technologies.



Neurological Paralysis and Weakness

Market Potential by Condition and Disease

A ‘Vicious Cycle’ of Walking Inactivity



MOVE SUIT

STROKE

First-time strokes among people aged 45 and over in the UK will rise from **117,600** in 2015 to **148,700** in 2025 and **187,000** in 2035, an increase of **59%** over 20 years.

The number of stroke survivors among people aged 45 and over in the UK will rise from **950,000** in 2015 to **1,425,000** in 2025 and **2,120,000** in 2035, an increase of **123%** over 20 years.

Stroke association

MULTIPLE SCLEROSIS

It is estimated that there are over **130,000** people with MS in the UK, and that each year nearly **7,000** people are newly diagnosed.

Therefore **1 in every 500** people in the UK lives with MS, and each week over **130** people are diagnosed with MS.

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PARKINSON DISEASE

In 2018 **145,000** people in the UK were diagnosed with the condition (around **1 in 350** adults in the UK). Diagnoses are set to rise by nearly a **fifth** by 2025.

Most symptoms develop at **50** years of age, although around **1 in 20** people with the condition first experience symptoms when they're under **40**.

PARKINSON'S UK

CHANGE ATTITUDES. FIND A CURE. JOIN US.

MOVE SUIT

SPINAL CORD INJURY

There are an estimated **50,000** people in the UK living with a spinal cord injury and each year approximately **2,500** people are newly injured.

back up
transforming lives after spinal cord injury

sia
spinal injuries association

MOTOR NEURONE DISEASE

MND affects up to **5,000** adults in the UK at any one time.

There is a **1 in 300 risk** of getting MND across a lifetime. It can affect adults of any age but is more likely to affect people over **50**.

TRAUMATIC BRAIN INJURY

It is estimated that **900,000** head injury occur each year, including around **100,000** classified as severe.

Inpatient admissions in the UK are approximately **160,000** a year, with males accounting for the majority (**62%**) and **140,000** require treatment.

Rates of admission are highest among people aged **75+.**

It is estimated that there are up to **1.3 million** people in the UK living with a TBI-related disability.

Headway
the brain injury association

GUILLAIN-BARRE SYNDROME

Approximately **1,500** people are diagnosed each year with GBS.

Around **20%** of people are left with long-term problems.

The Competitive Landscape

A review of existing gait training systems in the UK

Mapping Clinical Installations

Number of Installations in Neurorehabilitation settings – Private and NHS

3

8

7

10

14

1

50+

The UK competitive market review. The result of which will be used to identify threats and weaknesses in a SWOT analysis.

ekso BIONICS

Main Indications:
SCI, MS, Stroke, GB (Clinical Use)

Power Requirements:
X2 batteries – change between use.

Weight:
23kg

User:
Up to 100kg in weight and between 5'2" and 6'4" in height

Features:
Pre-ambulatory tools, Smart Assist

Cost: ~£125,000 (6.0)

ReWalk™ More Than Walking.

Main Indications:
SCI (Personal 6,0)
Stroke (Restore)

Power Requirements:
X2 batteries – change between use.

Weight:
23kg

User:
Up to 100kg in weight and between 5'2" and 6'4" in height

Features:
Pre-ambulatory tools, Variable Assist

Cost: ~£80,000 (6.0)
Cost: ~£23,000 (Restore)

indego

Main Indications:
SCI (T3-L5)

Power Requirements:
X2 batteries – change between use.

Weight:
13kg

User:
Up to 113kg in weight and between 5'2" and 6'4" in height

Features:
Pre-ambulatory tools, Variable Assist

Cost: ~£62,000

ottobock.

Main Indications:
Rehabilitation

Power Requirements:
Battery power charged daily

Weight:
12.6kg

User:
Up to 125kg in weight and between 4'8" and 6'2" in height

Features:
Bionic Knee Foot and Ankle Orthosis

Cost: ~£60,000 (max)

G®

Main Indications:
Rehabilitation
Sport Rehabilitation

Power Requirements:
Mains power supply required.

Weight:
N/A

User:
Up to 180kg in weight and between 4'8" and 6'4" in height

Features:
100% bodyweight to 20% bodyweight

Cost: ~£60,000 (max)

tyromotion

Main Indications:
Neurological Rehab

Power Requirements:
Mains power supply required.

Weight:
N/A

User:
Up to 180kg in weight and between 4'4" and 6'2" in height

Features:
End effector gait trainer

Cost: TBC (not published)

L300

Main Indications:
Neurological Rehab

Power Requirements:
Each battery charge will last for 3 hours.

Weight:
L300 Go 45g / Plus 150g

User:
Height and weight are N/A for the L300 Go and Plus

Features:
Functional Electrical Stimulation.

Cost: ~£4,800 (each)

The UK Opportunity

Identifying and Mapping the Market

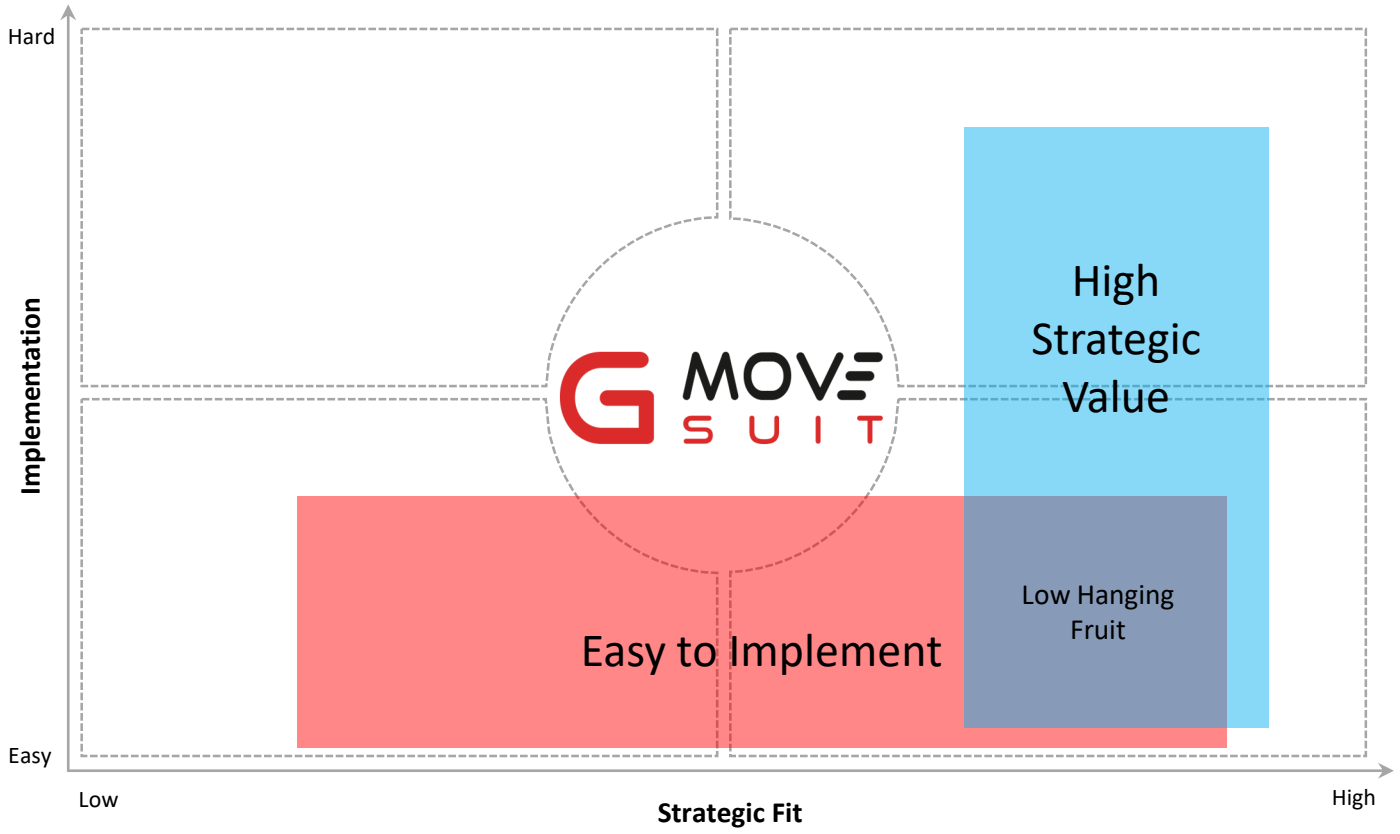
Evaluating the strategic position of the GMove suit across the UK **private sector**. It classifies **early** business opportunity into four categories based on market research, existing knowledge and relationships.

Private clinics or hospital groups with existing gait rehabilitation technology.

23

Private clinics or hospital groups that would benefit from G-Move in addition to existing.

19



Private clinics or hospital groups identified as being high strategic value.

24

Clinics or hospital groups identified as "low hanging fruit".

29

The NHS Landscape

HOSPITAL DISTRIBUTION	POPULATION DISTRIBUTION
England 68%	84% England
Scotland 22%	8% Scotland
Wales 7%	5% Wales
Northern Ireland 3%	3% Northern Ireland

KEY METRICS

12	Spinal Injury Units
200	Neurological Rehabilitation Units
183	Stroke Units

REGIONAL REHABILITATION UNIT – AN EXAMPLE

St George's University Hospitals NHS Foundation Trust

The trust provides specialist neurorehabilitation to patients who require intensive therapy following acquired neurological conditions resulting in physical or psychological disabilities. This includes patients who have had strokes, traumatic injuries to the brain or spine, anoxic brain damage, diseases or infections of the nervous system, and long-term conditions like multiple sclerosis. Services are provided on an inpatient or day patient basis.

The **Wolfson Neurorehabilitation Centre -** The Wolfson has 27 beds for adults (16+) who have a range of neurological difficulties.

The **Atkinson Morley Regional Neurosciences Centre** at St George's Hospital is an internationally renowned unit for neurology, neurosurgery, neurorehabilitation and stroke services. The hospital offers comprehensive services for the diagnosis, treatment and care of all conditions that affect the brain, spinal cord and the peripheral nervous system and muscles.

Re-Defining Gait Training

GMOVE is a portable, adjustable and soft exoskeleton designed to help patients with lower-extremity paralysis or weakness stand up and walk

S.W.O.T Analysis

Evaluating GMOVE's competitive position


S
Strength
Cost
Don / Doff time
Clinical and home use
Broad utility
Weight
Battery life
Market readiness
Private and NHS potential customer base
One high profile ambassador
W
Weakness
Lack of branding differentiation
Lack of clinical evidence
Lack of sales and marketing tools collateral
Social media presence
Lack of clinical advocates / KOL networks
Lack of product ambassadors
O
Opportunity
Leverage existing relationships for early wins and suit placement
Capitalize on competitor barriers to adoption (cost, battery life, clinical and home use, utility and market readiness)
Own the neurorehabilitation exoskeleton space and become number one in the UK market based on installs, repeat sales, adoption and utilization
T
Threats
Resources and headcount
Customer perceptions
Emerging competitors

2021 and Beyond

Objectives, Strategy and Activities

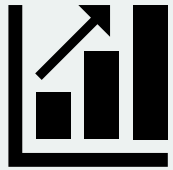
UK Strategy

WIN

- **Competitive**, **profitable** accounts by leveraging existing longstanding professional relationships.
- New accounts leveraging the **GMOVE Academy**.
- Targeted, non-GMOVE private practice **customers through indication-based selling**.

CREATE

- A GMOVE footprint in **NHS Hospitals** providing neurological rehabilitation services**.**
- Brand awareness through social media awareness and product ambassadors.



GROW

- **Existing Winback accounts** by cross selling between GMOVE and product portfolio.

Be the **#1** Exoskeleton Company in the UK by **2023**

The Academy

The GMove Training Academy is an online learning platform designed for clinicians looking to advance their knowledge on GMOVE. A comprehensive library of resources, including:
Clinical studies
Interactive learning tools
Video training guides
On-line community

Peer to Peer

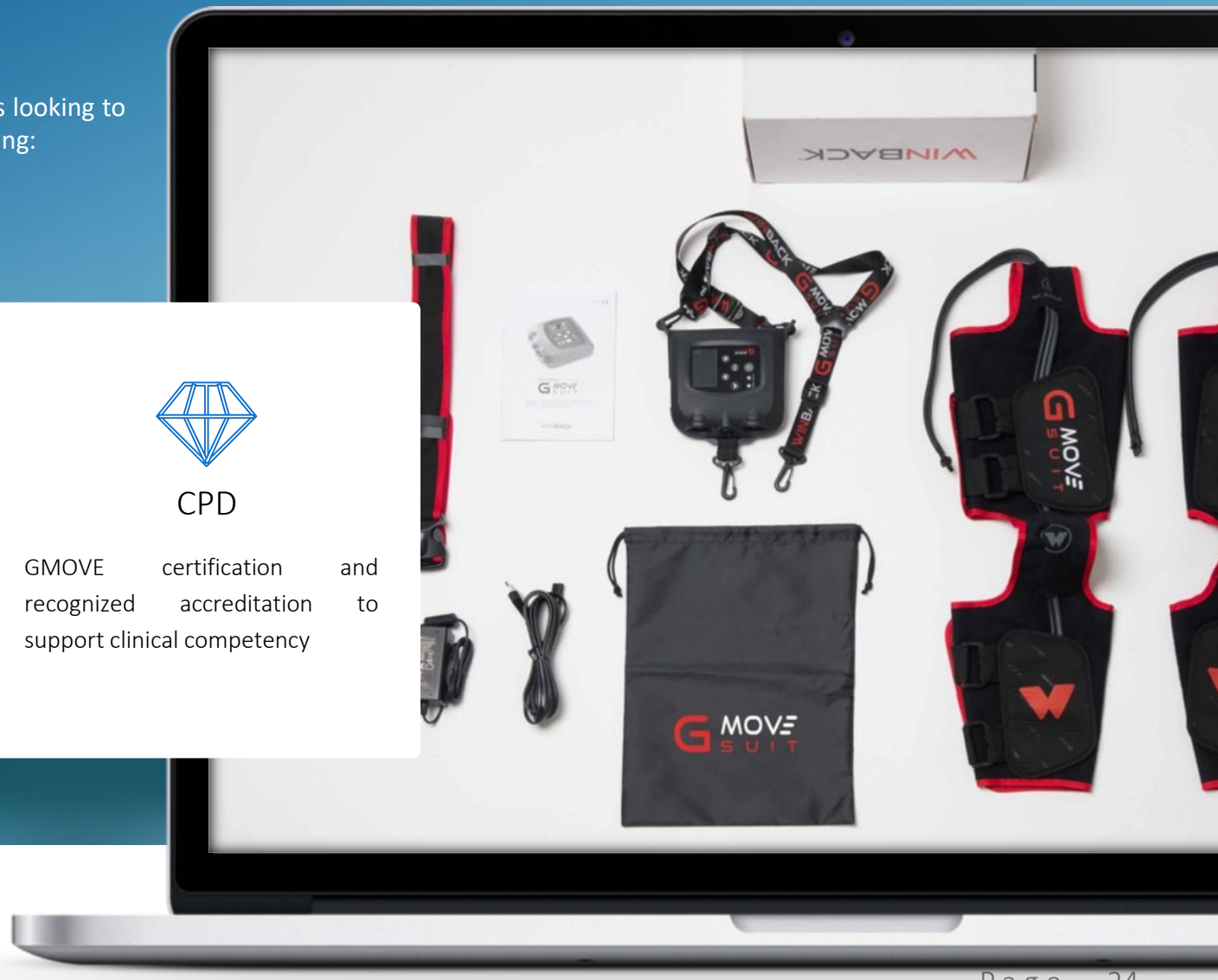
Online community to foster discussions and shared experiences and best practices

Virtual

Online educational support courses and resources

CPD

GMOVE certification and recognized accreditation to support clinical competency



Social Media

89% of businesses are using social media
70% are using social media daily.
15% claiming they "depend on it"
68% claiming it "benefits their business significantly".

The top four reasons for using social media:
1. "providing customer service" (46%)
2. "finding new customers" (39%)
3. "maintaining relationships with existing customers" (37%)
4. "publicising events and promotions" (36%)

Social media plays an essential role in how consumers discover, research, and share information about brands and products. In fact, around **60%** of consumers who researched products online learned about a specific retailer or brand through social networking sites. Active social media users are more likely to read product reviews online.

2021 UK Strategy and Beyond

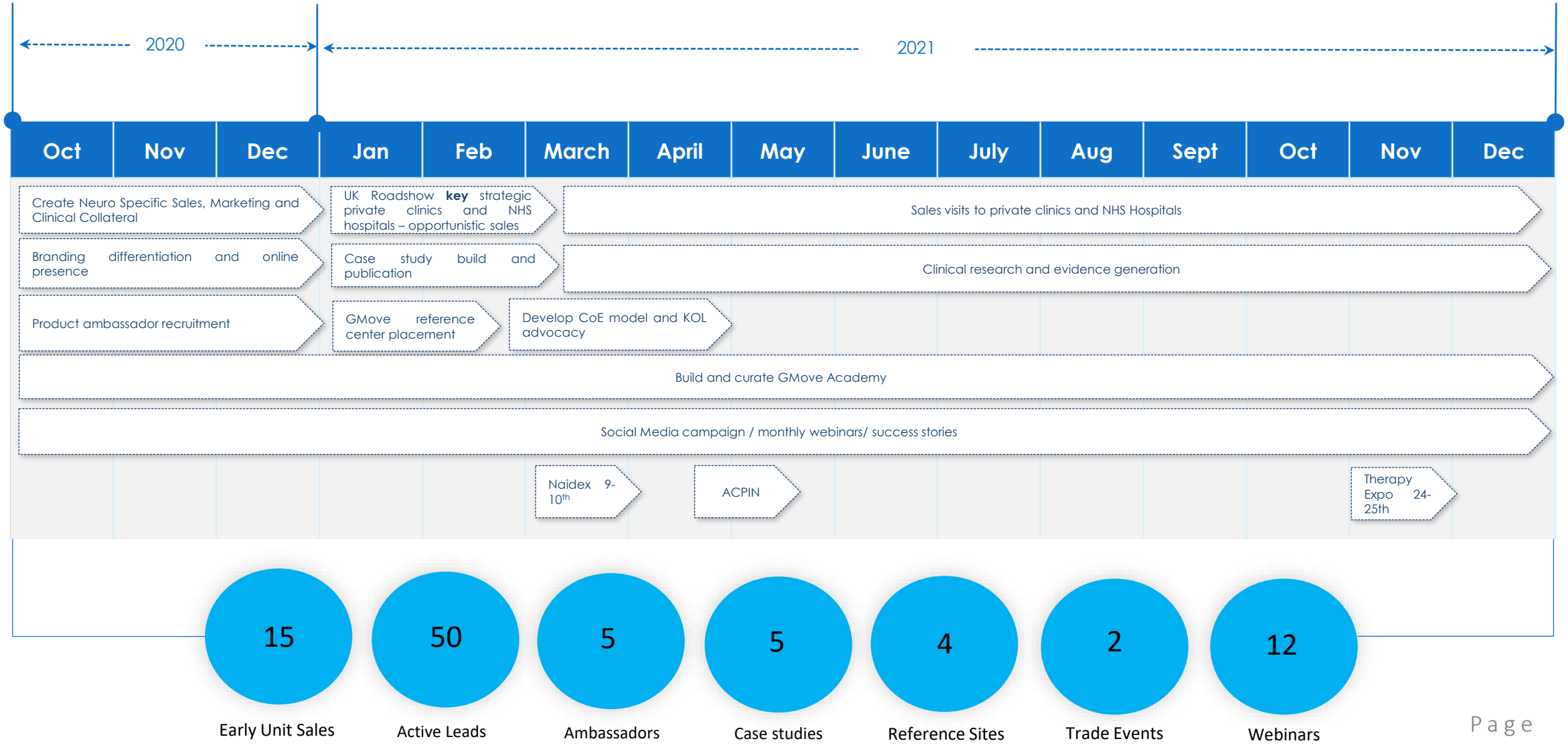
Business Objectives	Market Objectives	Strategy	Activities/Decisions/Recommendations
a) Set-up foundation for long-term business in UK. b) Short term vs long term balance. c) Establish the GMOVE Suit as market leader in the UK. d) Provide route to market for new product development and introduction. e) Increase installed units across the UK in both private and NHS settings. f) Promote personal use sales through development of clinical re-selling or referral program. g) In absence of direct sales force develop defined UK distributor route(s) to market h) Promote cross selling of the Winback portfolio.	a) Broaden / deepen GMOVE suit footprint in UK targeted rollouts both within private and NHS settings. a) Drive and implement clinical research and market education. b) Solidify presence in key strategic rehabilitation clinical settings c) Winback and the GMOVE suit to become the recognized brand in the neurorehabilitation assistive device market both in clinical and home environments	a) Build UK centric business (organization, processes, decisions/communication). b) Proof of concept as our best ally leveraging clinical and economic evidence. c) Build business in key strategic UK accounts utilizing existing network (starter units, demonstration machines) already accepting robotic technology. d) Short term targeted focus on early adoption (Spinal Cord market well defined and competitor accounts) to promote quick sales. e) Develop and run separate sales and marketing campaigns for the private and NHS markets. f) Establish re-imbursement in key strategic markets. g) Define and differentiate product identity from sport	**a) Establish successful private neurological clinical network** • Focus on early adoption and quick sales in large private practices and strategic locations. • Leverage existing relationship networks in private clinics for quick sales to establish early market adoption and utilization. • Develop clinical and technical training competencies (train the trainer clinical pathway) **b) Direct sales models** • Outright purchase discounts for multiple units - Clinical • Re-seller and commission payment – Private Clinical Partners • Become established on NHS supply chain through procurement partnerships **c) Establish / Enhance increased visibility** • Develop KOL / patient advocates / advisory research council • Develop “Center of Excellence Model” to acts as a reference center for sales, marketing , research protocol and product development – discounted or free units required. • Utilize existing relationships (user groups/prestige rehabilitation centers/medical legal/high profile foundations) for quick sales and clinical evidence generation • Develop “Product Ambassador(s)”/high profile users with and leverage across media platforms • Be present at key events in UK • Strategically support and sponsor individuals and or organizations to drive awareness and visibility of the GMOVE suit **d) Clinical and economical efficacy** • Focus on case studies series with a small number of participants (concentrating on specific disease/injury /conditions) underpinned by larger trials / white paper(s) • Develop multi-centered trials (quality of life, functional outcomes, health economics) • Develop specific clinical protocols for application across all disease/injury /conditions **e) Invest in product differentiation** • Differentiate how the product looks from sport • Dedicated own website • Create specific sales, marketing and clinical material and engagement tool for the GMOVE suit **f) Invest in social media** • Dedicate resource and or finance across all social media platforms

UK Plan

Q4 2020 – 1H 2021 and KPI’s

UK GMove Plan Q4 2020-2021

1H 2021 KPI



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