

Market Map of Immersive Healthcare

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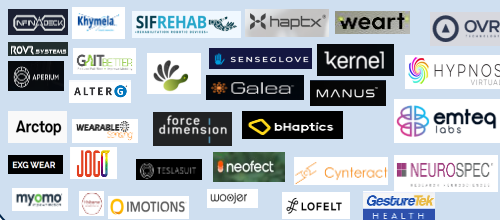
Commentary

- 2022 saw greater acceptance of immersive technologies in healthcare
 - FDA received an additional 8 submissions for clearance – down from 12 in '21
 - CPT Code 0770T went into effect in Jan 1, 2023 a step to making economics work
 - The VA continued to expand its internal offering especially in pain management and employee support
 - Funding of XR healthcare companies was about flat versus '21 at roughly \$250mm
 - As with other nascent businesses, valuations fell throughout 2022
- Outlook for 2023
 - Expect further consolidation – BehaVR & OxfordVR are merely the beginning
 - Too many small companies are competing for the same business
 - Companies seem to be growing, but none seem to be beyond breakeven in profitability
 - Expect to see many more bankruptcies as the market discerns which are viable businesses
 - VC has good dry powder, but are unsure of valuations, so funding will be harder
 - Valuations are likely to fall offset by growing revenue bases
 - More health insurers will have to pay for XR treatments to have the industry truly accelerate
 - Value based care or pay-for-performance to share risk and reward between payers, providers and companies should accelerate industry growth

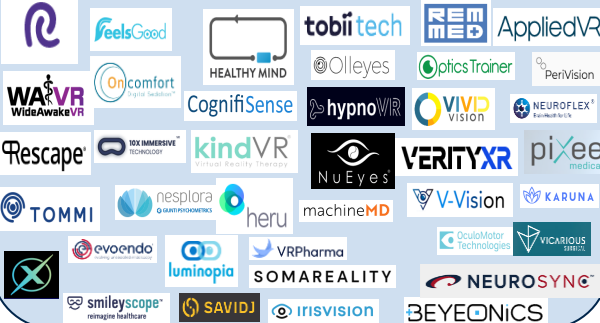
Current landscape in immersive healthcare

(See appendix for details)

Hardware



Clinical



Rehab



Training



Mental Health & Wellness



Support & Services



Hardware -

Equipment used in conjunction with AR/VR in healthcare applications

Treadmills



Bio-Feedback



Exo-Skeleton



Haptics

Gloves



Interfaces



Other



Olfactory



Training

Applications for use by healthcare providers utilizing AR/VR

In Vivo Training

Surgical Training



Peer-to-Peer



VR & Haptic Training



Anatomy



3-D Imaging



Ex Vivo Training

General W/ Healthcare



Healthcare Specific



Patient Training



Clinical

Used directly with patients for treatment or diagnosis of specific ailment

Pain Management



AppliedVR



KARUNA



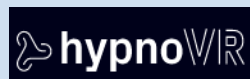
FeelsGood

CognifiSense



Rescape

VERITYXR



Pediatrics Focused



kindVR
Virtual Reality Therapy



Vision and Eyecare

tobii tech



Amblyopia



OpticsTrainer



Ocular Diagnostics



Diagnostics



machineMD

altoida



SOMAREALITY

VR/AR Assisted Surgery



BEYEONICS



Rehab

Used for consistent longitudinal treatment

Neuro Rehab



Other



Physical Rehab



Therapist to Patient



Other



Senior Care



Peer2Peer



Journeys



Mental Health & Wellness

Therapies to elevate Mood and Well-being

Mental Health

BEHAVR **IDEGO** **Flintworks** **VitalStart**
The Vital Sign for Well-Being™

Virtual Rehab **newpath** **NORDIC**
NEUROTECH

HealthVR **Wake Up and Smile** **Rocket**
VR HEALTH

VRDreams **Greener Games** **HEKA VR** **NEUROTOPS**

Sympatient **even health** **nevaro** **neurofit**

Phobia Treatment

C2 CARE **Virtual Reality Medical Center** **VR-Nature™** **XR Therapeutics**

PSYC REALITY **curabit** **oVRcome** **Dental Phobia Treatment**

PsyTech

EMDR

Psylaris **moovd**

Pediatric Mental Health

Take-Pause **Calma** **LittleSeed**
Anxiety Reduction in Virtual Reality Under Water VR Therapy

floreo **COGNITIVE LEAP** **M I K O**

POT-MATH

Therapist to Patient

Camelia **THERA INC.** **neomento**

Wellness

Calming Software

relax vr **flowly**

Happinss **REULAY**

magic horizons **esqapes**
my better life immersive relaxation

Meditation

HEALIUM **Visutate** **AT ONE**
MIND MASTERY

Meditainment **Flow**

Cyberdelics

FireflyVR **TRIPP**

Entheo Digital

Addiction

MIND COTINE

LobVR

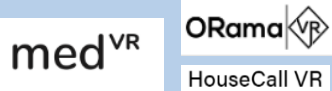
Support and Services

Providing resources for companies providing healthcare

Studios focused on Healthcare



Education in Medical VR



Rapid content creation



Medical 3D Asset Creation



Support

Hardware



Software

Platforms



IP Licensing



Volumetric Image Capture

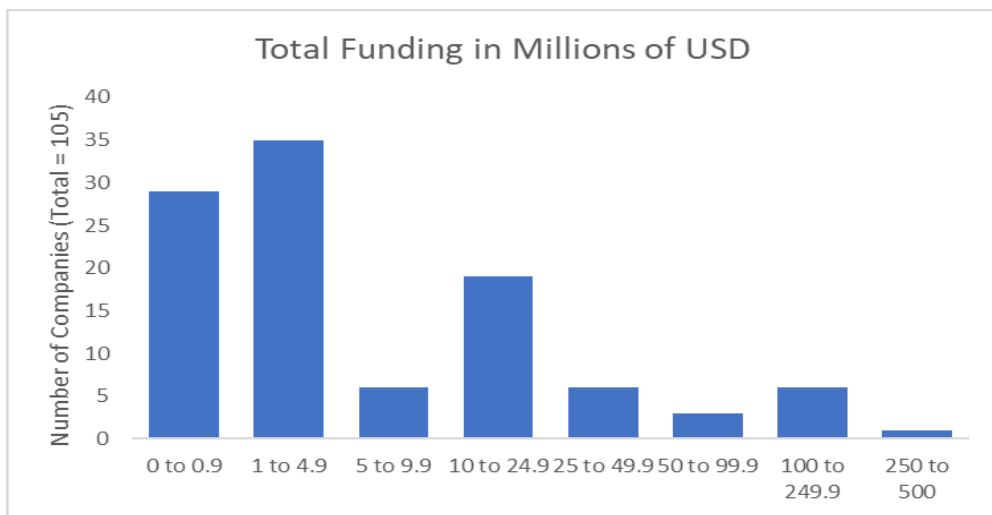
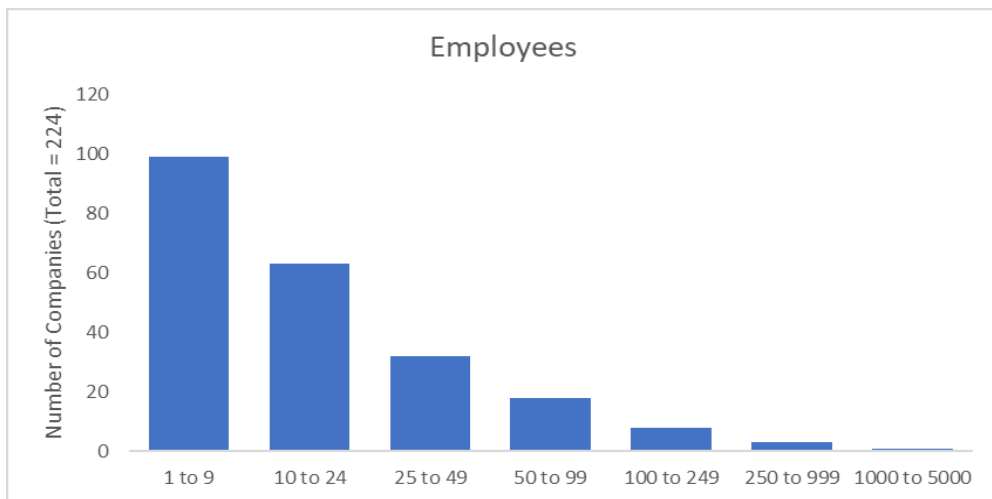


Large Life Science Companies with Immersive Efforts



Basic Statistics

(Excludes Large Companies)



Fundings of at Least \$1mm in '22:

Company	Amount (\$ mm)	Date
MindMaze	105.0	2/17/22
XRHealth	10.0	2/28/22
Entheo Digital	1.0	3/1/22
OssoVR	66.0	3/24/22
Tripp	11.2	6/4/22
Neo Auvra	1.5	6/20/22
Amelia Virtual Care	7.4	6/28/22
Living Brain	1.7	7/11/22
Fundimental VR	20.0	8/11/22
MachineMD	3.2	9/6/22
HaptX	23.0	9/15/22
ORamaVR	2.1	10/12/22
SimileyScope	4.2	10/13/22
Oxford Medical Simulation	2.5	10/27/22
Florio	10.0	10/28/22
Neo Auvra	1.0	11/1/22
BehaVR	13.0	12/13/22