

Market Size and Calc

Top Down

Neurotech Revenues

(2015, Worldwide)

Total Available Market

\$172 Billion+



Neurotech Revenues

Non-medical (2024, Worldwide)

Serviceable Available Market

\$15.1 Billion



Neurotech Revenues

Non-medical (2024, Worldwide)

30% Market Share for OS

\$4.53 Billion

Bottom Up

Market Entities	2021*	2022	2023	2024	2025	Single Deal Size (ARR \$M)	TAM (2024) (ARR \$M)
Enterprises (1,000+ users Potential per entity)	20	30	40	60	80	11.41	685
Hardware Companies (2,500+ users Potential per entity)	30	32	35	32	30	0.06	1.8
Established Companies (50,000+ users Potential per entity)	300	350	400	450	500	5.34	2,403
Startups (3,000+ users Potential per entity)	700	900	1100	1400	1800	0.83	1,162
Academic Institutes	300	320	340	360	400	0.015	5.4
Total clients potential	1350	1632	1915	2302	2810		
Total Development users**	4650	5460	6275	7310	8650		ToT: \$4.257B
Total End-Users	447,000	551,000	1,200,000	1,368,000	1,740,000		

Reference

<https://www.marketexpertz.com/industry-overview/2019-neurotechnology-market>
<http://analytics.dkv.global/data/pdf/NeuroTechIndustryReport2017.pdf>
<http://news.neurotech.com/reports/Neurotech-Landscape-Overview-Report.pdf>

<https://www.worldhealth.net/news/global-neurotech-industry-landscape-overview-2020/>
www.emotiv.com/emotivpro/#choose-a-plan

*Verified
**2 per startup, 5 all the rest
Enterprises - Facebook, Google, Apple, Netflix, Spotify, Disney, ABB, Honeywell, Flextronics, Foxconn/Hon Hai, Integer, Medtronic, Trimble...
Established – Muse, Emotive, BrainCo, Neurosky, Imotions, MindMaze, Mindlift...

Go-To-Market Strategy

We Grow With Our Clients

Academia & Community Network Effect

SaaS Business Model Pricing

Monthly developer user subscription cost = \$250

Monthly End-User subscription cost = \$5

Neural Data Enterprise analysis cost = \$0.05 per min

Neural Data Established analysis cost = \$0.01 per min

Detailed Strategy

Focus on EEG+HRV technologies
Main effort on Enterprise design partners
Free software for Academia and small startups
Generate traction and early revenues
Test the Business Model

Add Eye Tracking + EOG technologies
Increase Traction and revenues
Test Network Effect assumptions
Verify Business model and Product market fit
Medical market research and entry point planning

Growth

Road Map Objectives

