

EUHA 2013 INVESTOR & ANALYST PRESENTATION

Nuremberg, Germany | 18 October 2013 | Lukas Braunschweiler, CEO



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VISION

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AT SONOVA, WE ENVISION ...

A WORLD WHERE
EVERYONE
ENJOYS THE DELIGHT OF
HEARING AND
THEREFORE LIVES A LIFE
WITHOUT LIMITATIONS

... “HEAR THE WORLD”



EUHA 2013 – HIGHLIGHTS

sonova

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HEAR THE WORLD

- Wireless communication

PHONAK

- Phonak communication portfolio
- Phonak pediatric solution
- Phonak cost conscious solutions

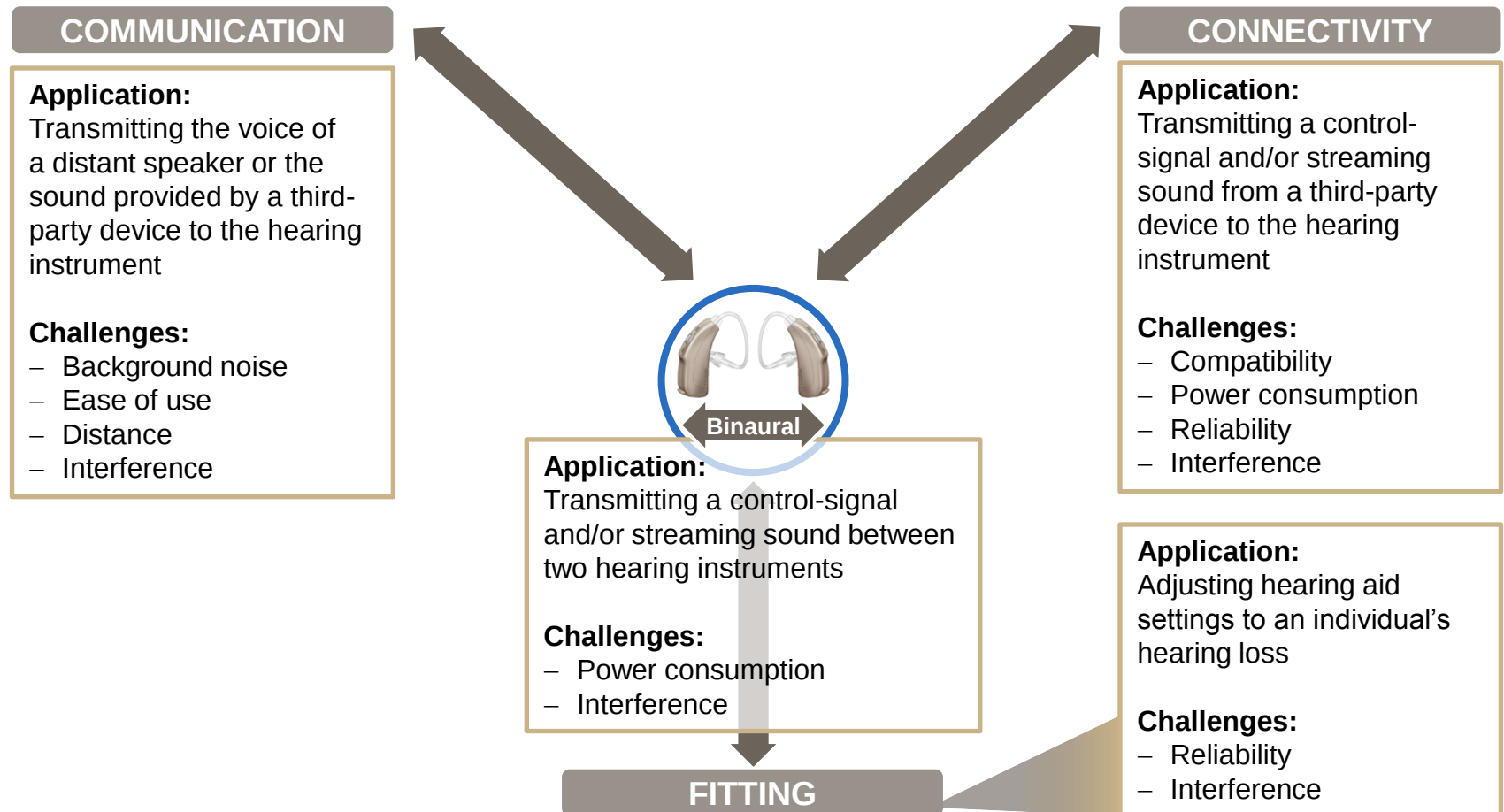
unitron

- Successful dual-brand strategy
- The new Unitron range



- New products Advanced Bionics
- Roger for CI

MAIN APPLICATIONS FOR HEARING AIDS – TREND TOWARDS WIRELESS LINK



WIRELESS COMMUNICATION

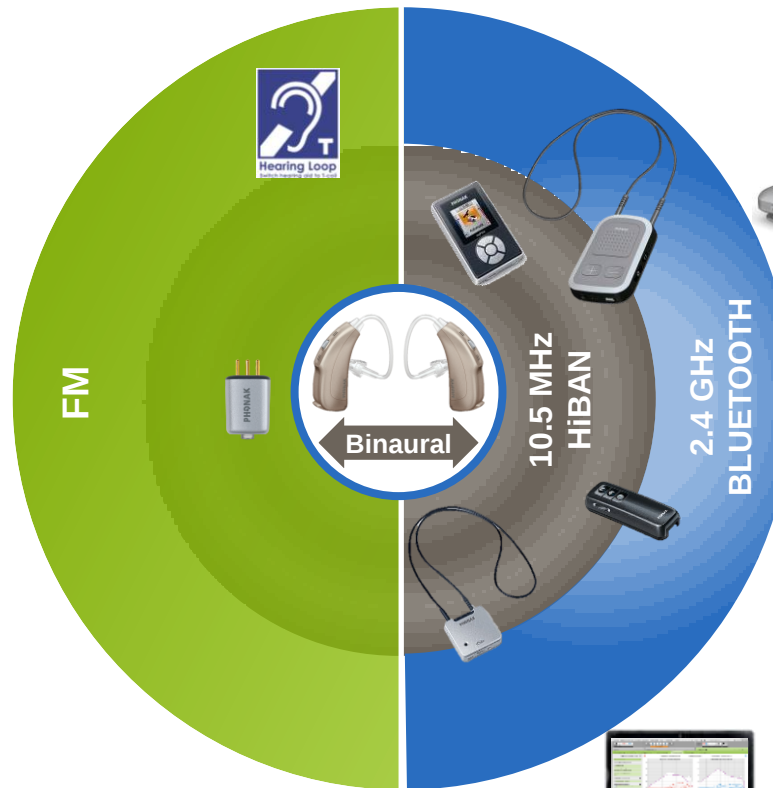
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TODAY – SPECIFIC SOLUTIONS FOR DIFFERENT USE-CASES

COMMUNICATION



CONNECTIVITY



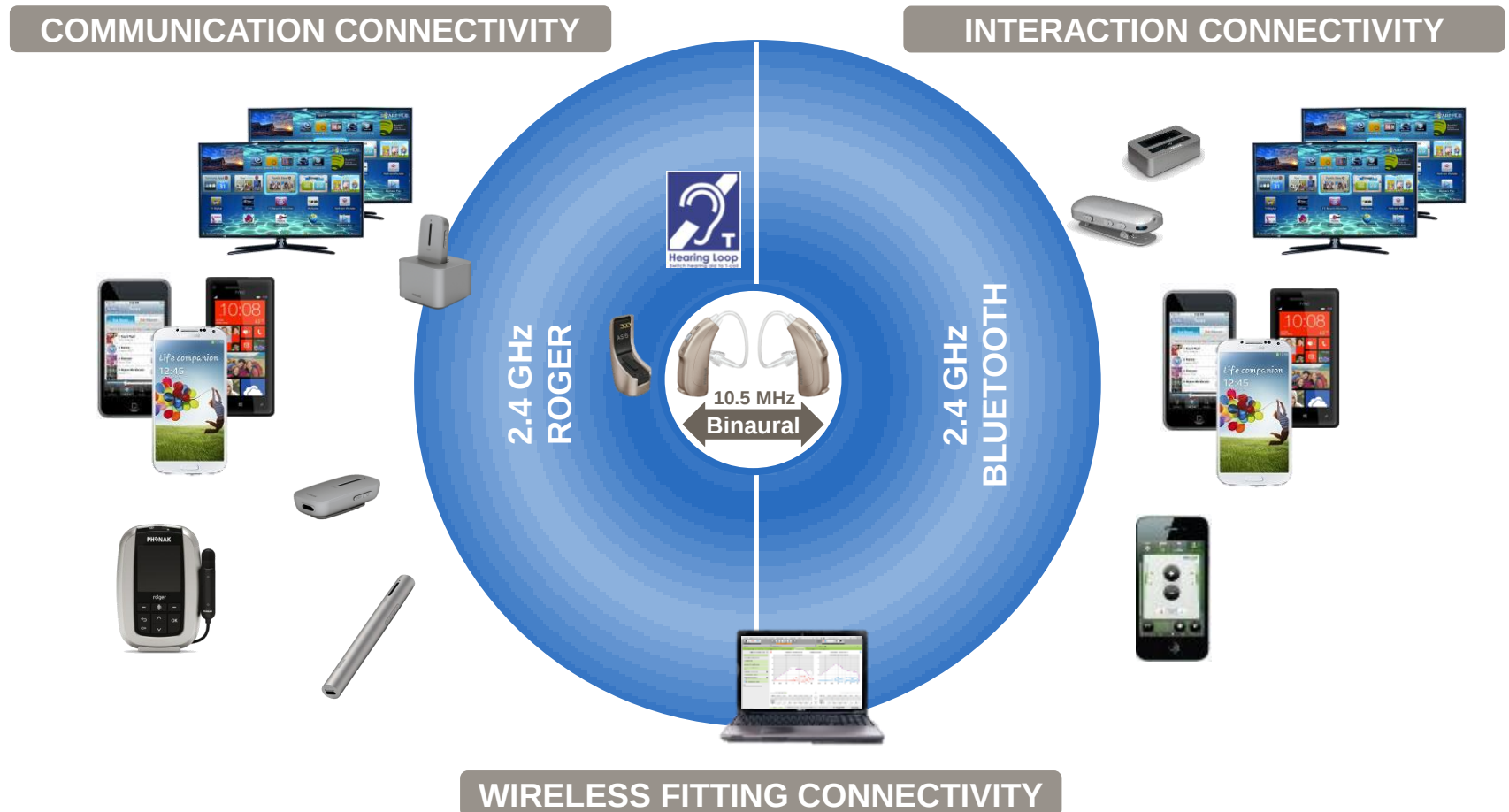
WIRELESS FITTING



WIRELESS COMMUNICATION

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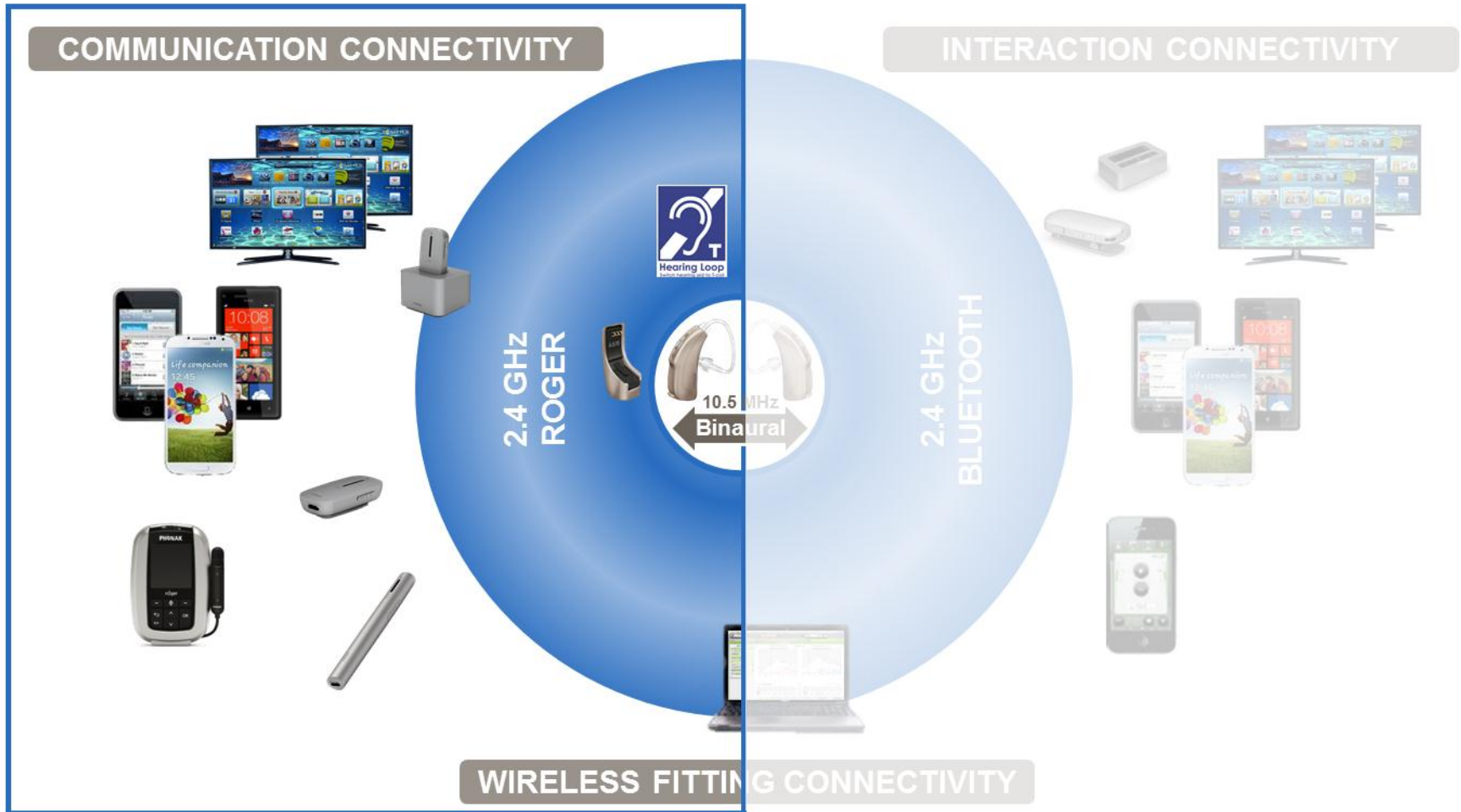
FUTURE – STANDARDIZED SOLUTIONS FOR MOST USE-CASES



WIRELESS COMMUNICATION

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STEP 1 – 2.4 GHZ / ROGER COMMUNICATION STANDARD AVAILABLE NOW



COMMUNICATION STANDARDS – 2.4 GHZ / ROGER AND 2.4 GHZ / BLUETOOTH

	2.4 GHz / ROGER	2.4 GHz / BLUETOOTH
Technology / carrier frequency	– Sonova 2.4 GHz ultra-low power chip	– Commercial 2.4 GHz low-energy chip
Communication protocol	– ROGER – Sonova proprietary	– BT Smart – <i>BT Classic & BT LE (*)</i> – <i>BT Foundation protocol (*)</i>
Purpose	– Spatial audio/data applications – Audiological signal processing	– General data/audio applications
Application scope	– Bi-directional & broadcasting – Long / medium / short distances – Audio & data (MATA) channel	– Point-to-point, <i>bi-directional (*)</i> – Medium / short distances – <i>Audio & data (MATA) channel (*)</i>
Performance	– Ultra-low power (designed for HI) – No signal delay / HiFi	– Medium / low energy – Signal delay
Compatibility	– Radio chip modules – HI / CI vendor compatible	– Built-in radio chips – HI / CI vendor specific
Availability	– Full – Introduced to HI/CI industry	– Specific solutions: today (BT Smart) – <i>Industry standard: 2-3 years (*)</i>
KEY CHALLENGES	NONE	BT PROTOCOL STANDARD (*)

(*) Long-term targets

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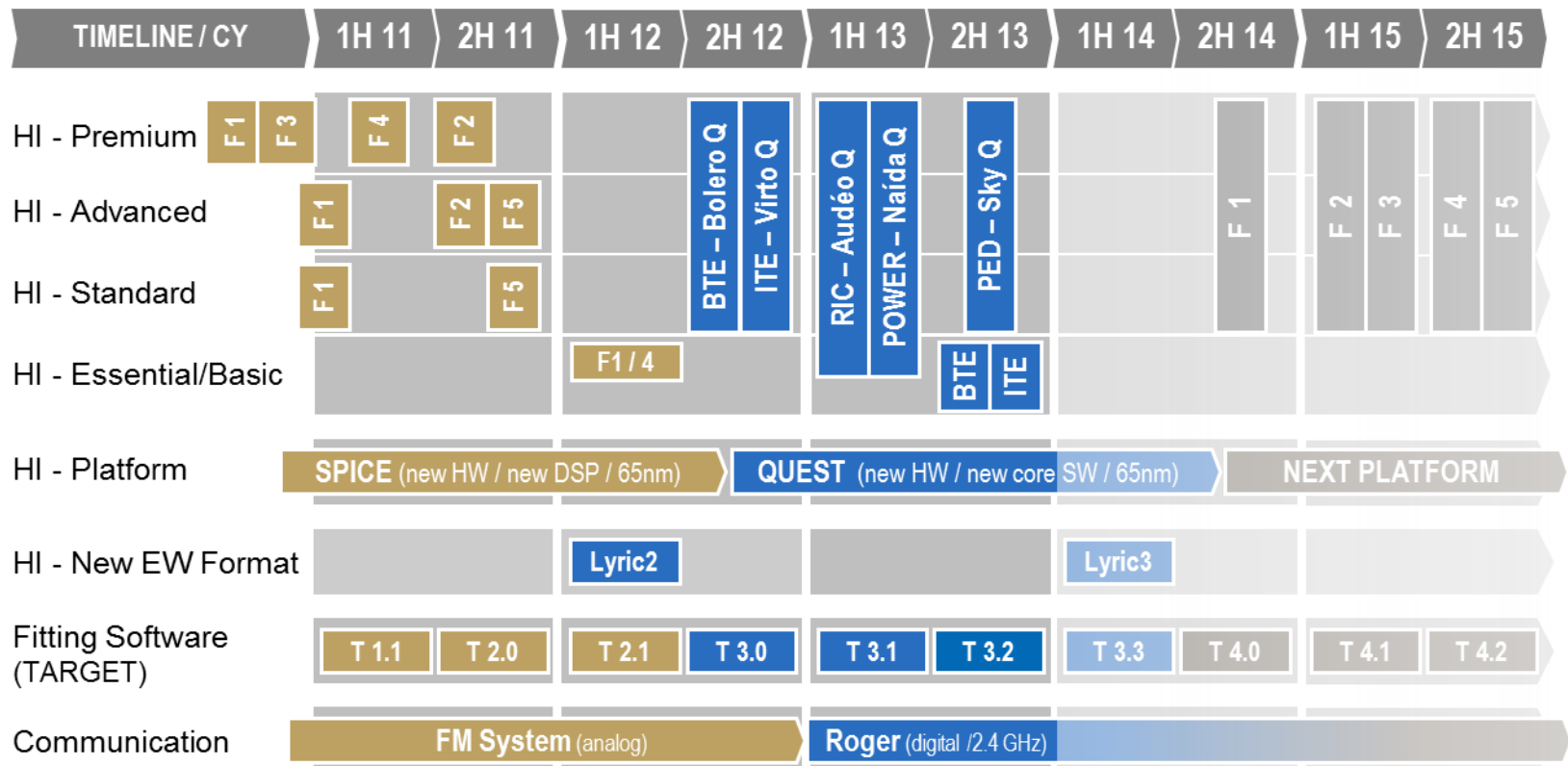
unitron

- Successful dual-brand strategy
- The new Unitron range



- New products Advanced Bionics
- Roger for CI

PRODUCT PIPELINE: DRIVE HIGH INNOVATION & PRODUCT LAUNCH RATE



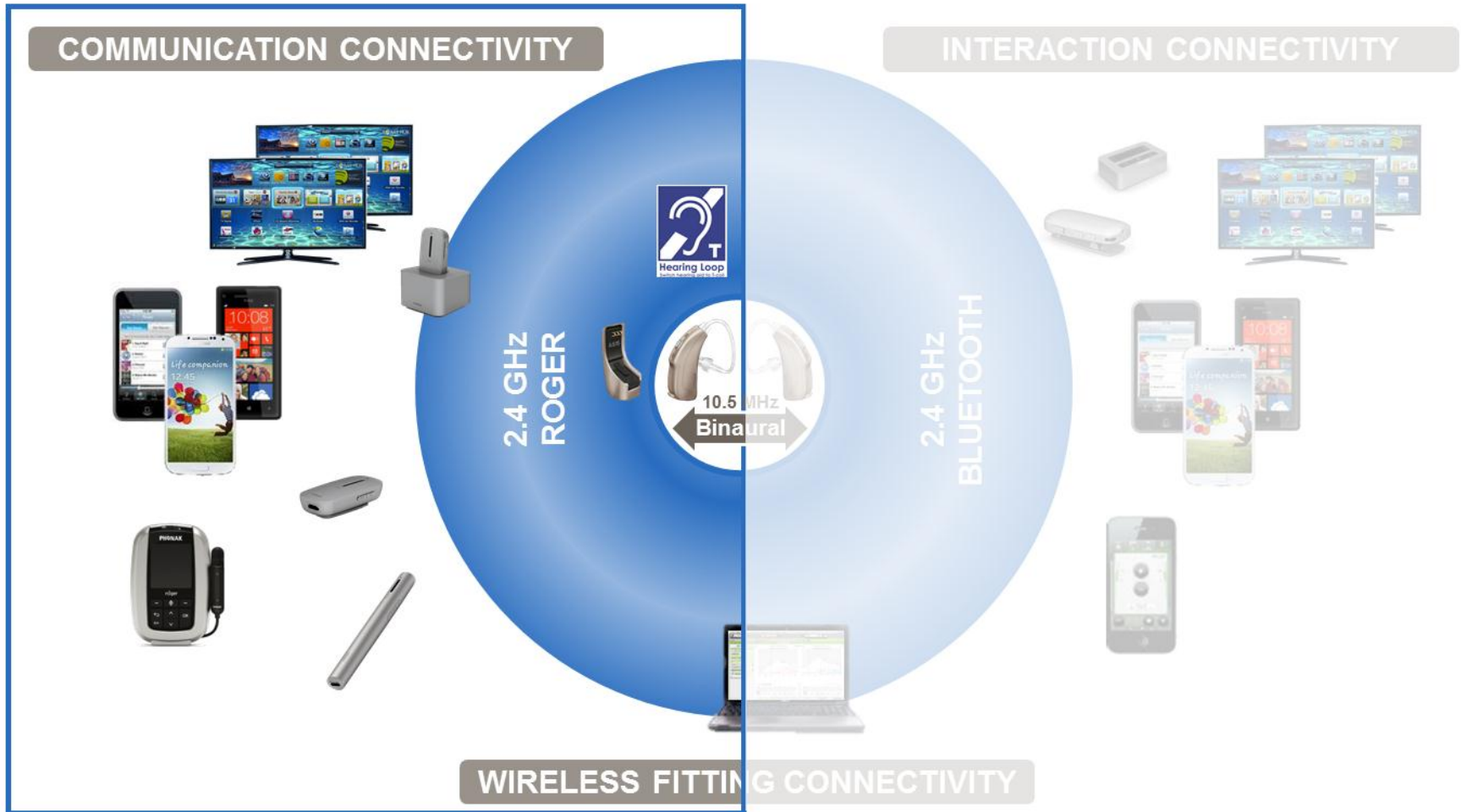
Note: Subject to change

COMPLETE RANGE ACROSS ALL FORMATS AND PERFORMANCE LEVELS

PHONAK COMMUNICATION PORTFOLIO

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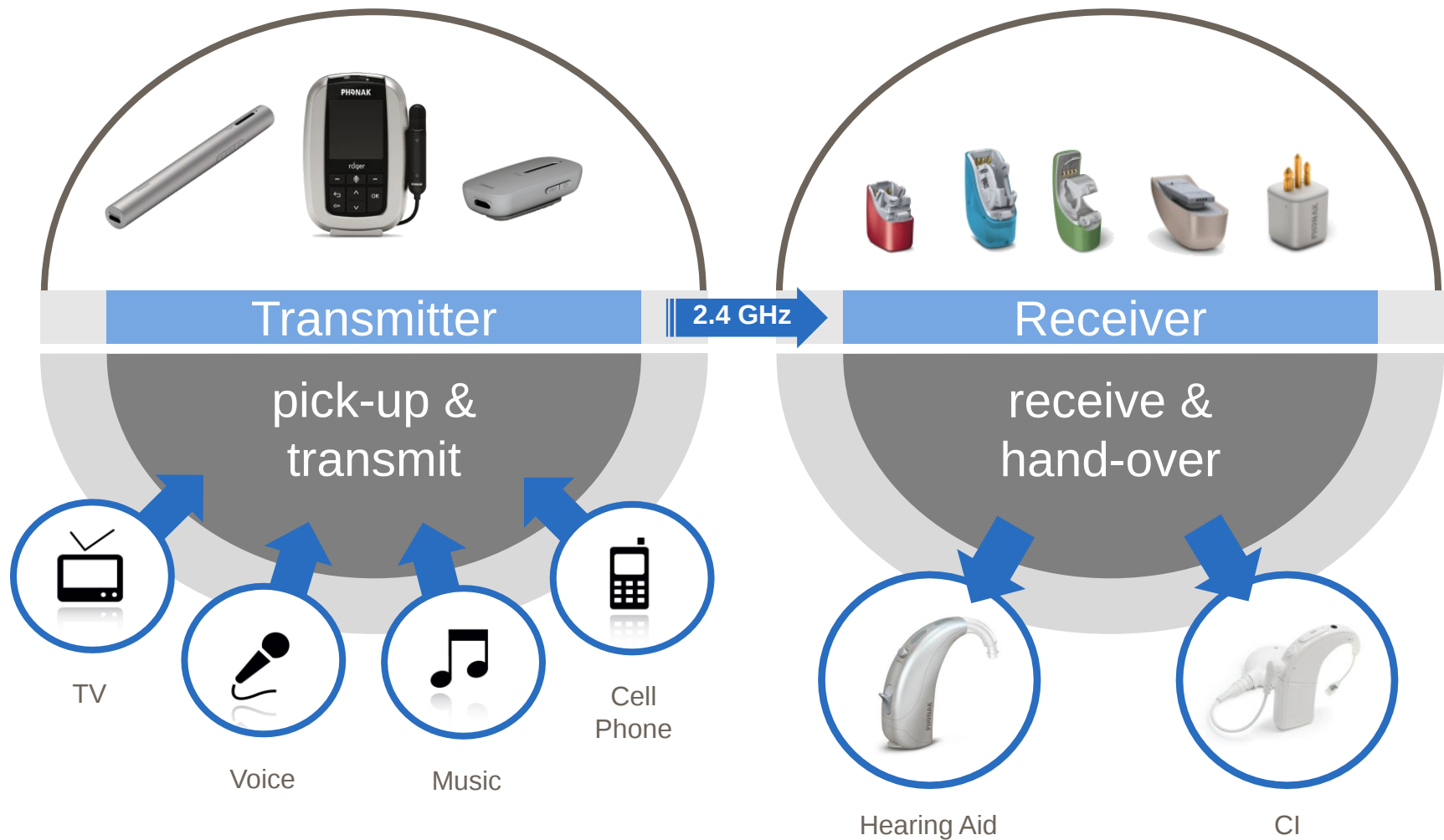
ROGER – FIRST TO USE DIGITAL ADAPTIVE WIRELESS TECHNOLOGY AT 2.4 GHZ



PHONAK COMMUNICATION PORTFOLIO

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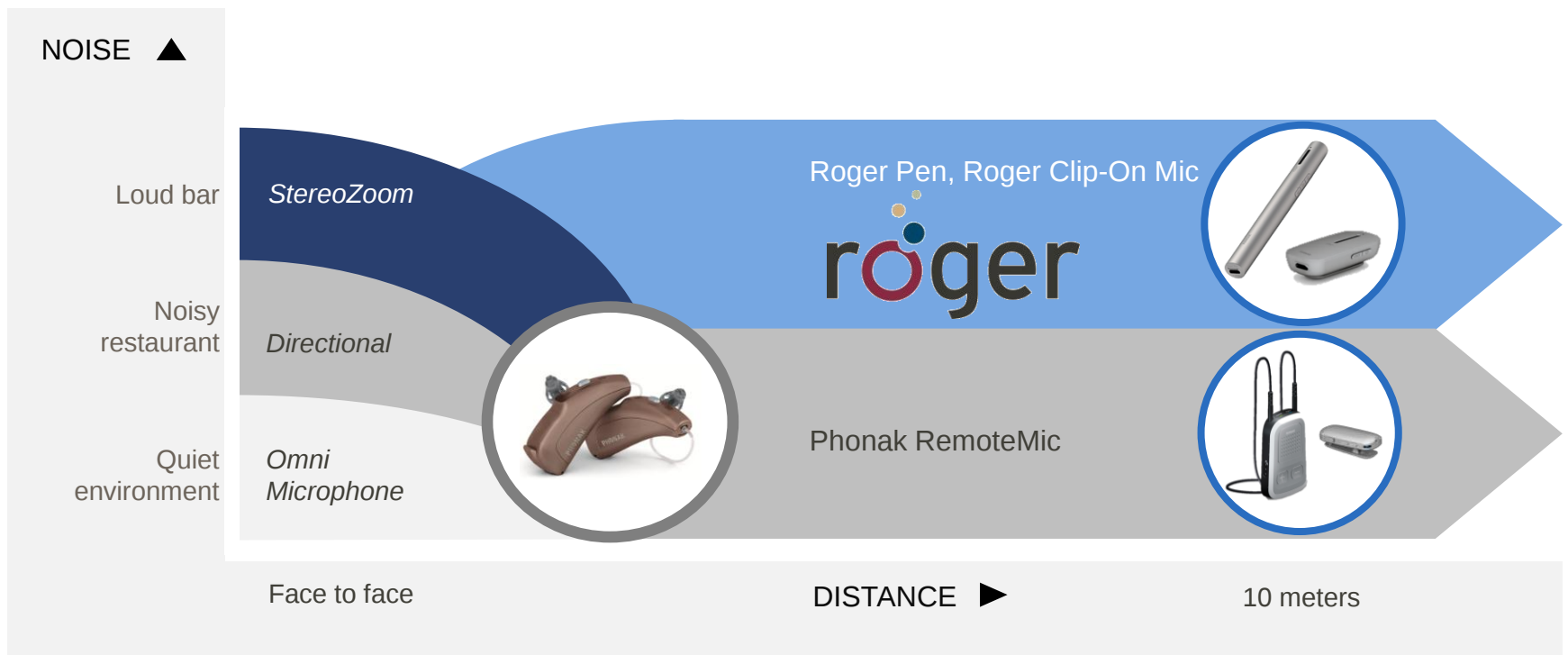
THE ROGER PRINCIPLE – COMPATIBILITY, FLEXIBILITY & STANDARDIZATION



PHONAK COMMUNICATION PORTFOLIO

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OVERCOMING THE CHALLENGES OF NOISE AND DISTANCE



COMPLETE RANGE OF SOLUTIONS

PHONAK COMMUNICATION PORTFOLIO

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BOOSTING PERFORMANCE, ENRICHING LIVES

Landline phone

Conversation in
loud noise or
over distance

TV and music

Cell phone

NEW!



NEW!



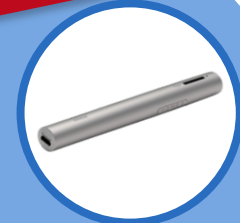
röger

NEW!



röger

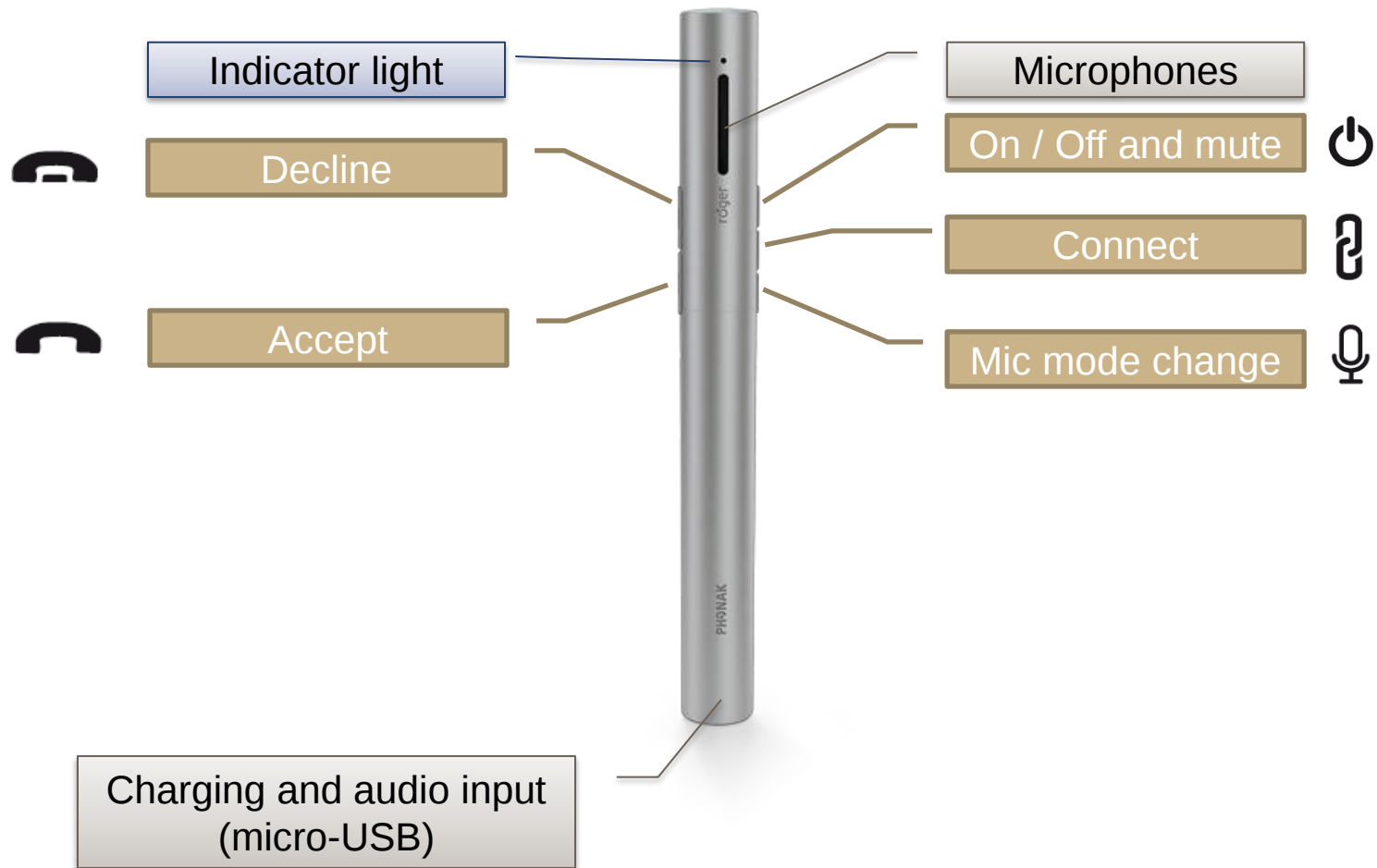
NEW!



röger



ROGER PEN – CUTTING-EDGE WIRELESS MICROPHONE, INCONSPICUOUS DESIGN



PHONAK COMMUNICATION PORTFOLIO

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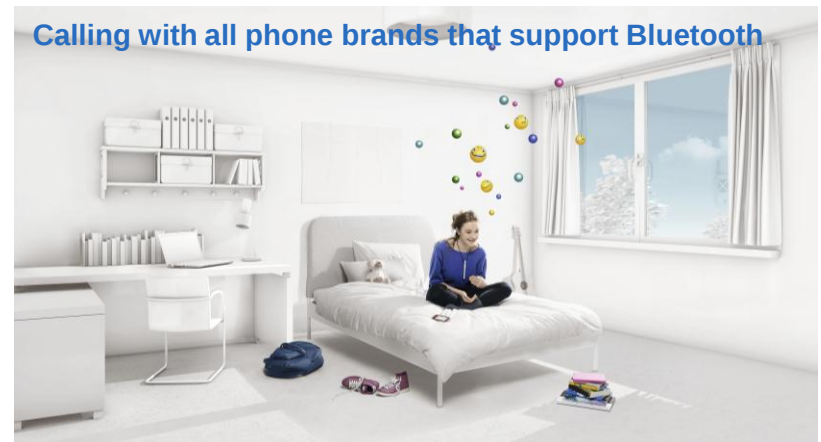
ROGER PEN – AUTOMATIC MICROPHONE MODES, BUILT-IN ACCELEROMETER



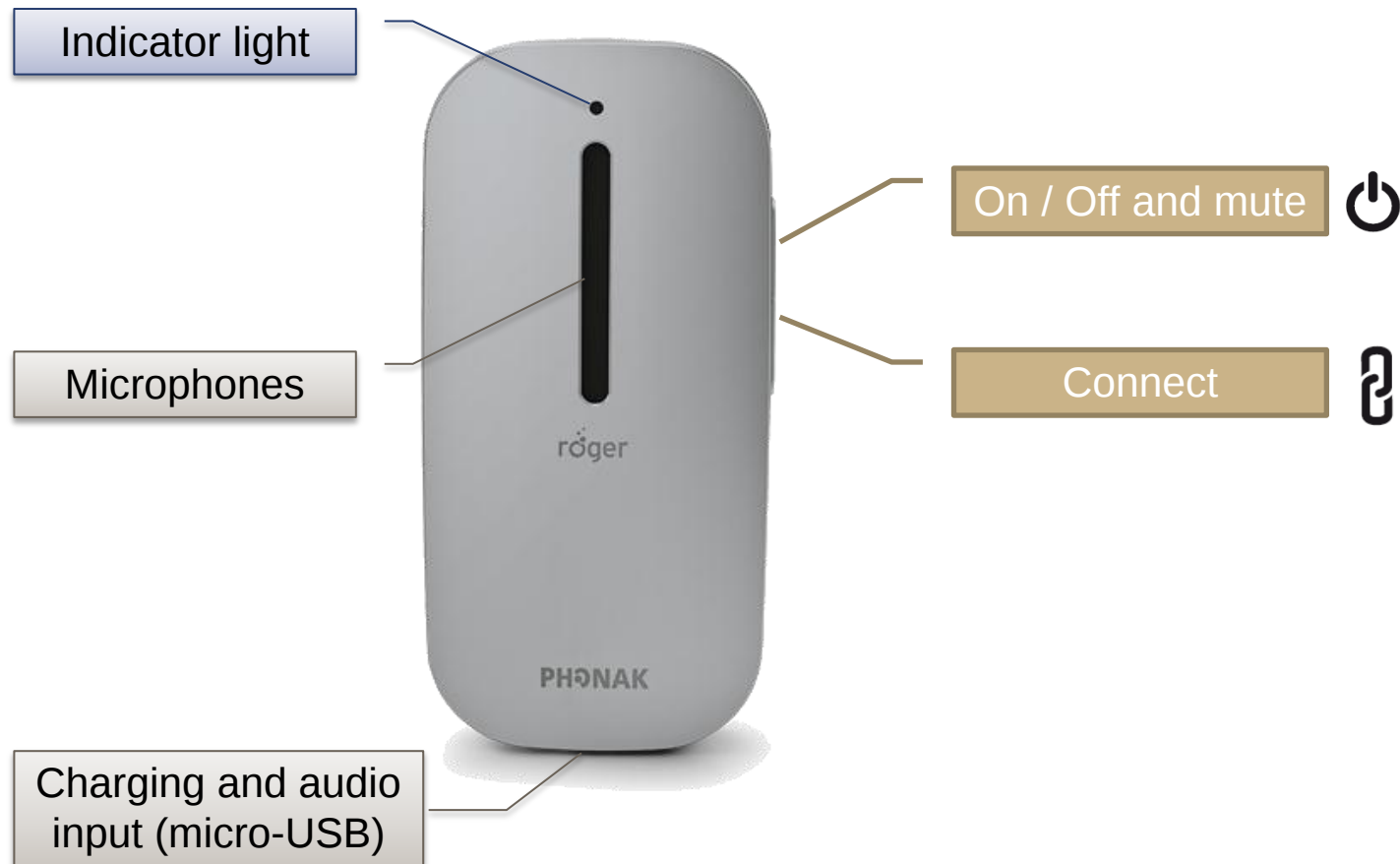
ROGER PEN – EASE OF USE AND BROAD RANGE OF APPLICATIONS

Feature highlights:

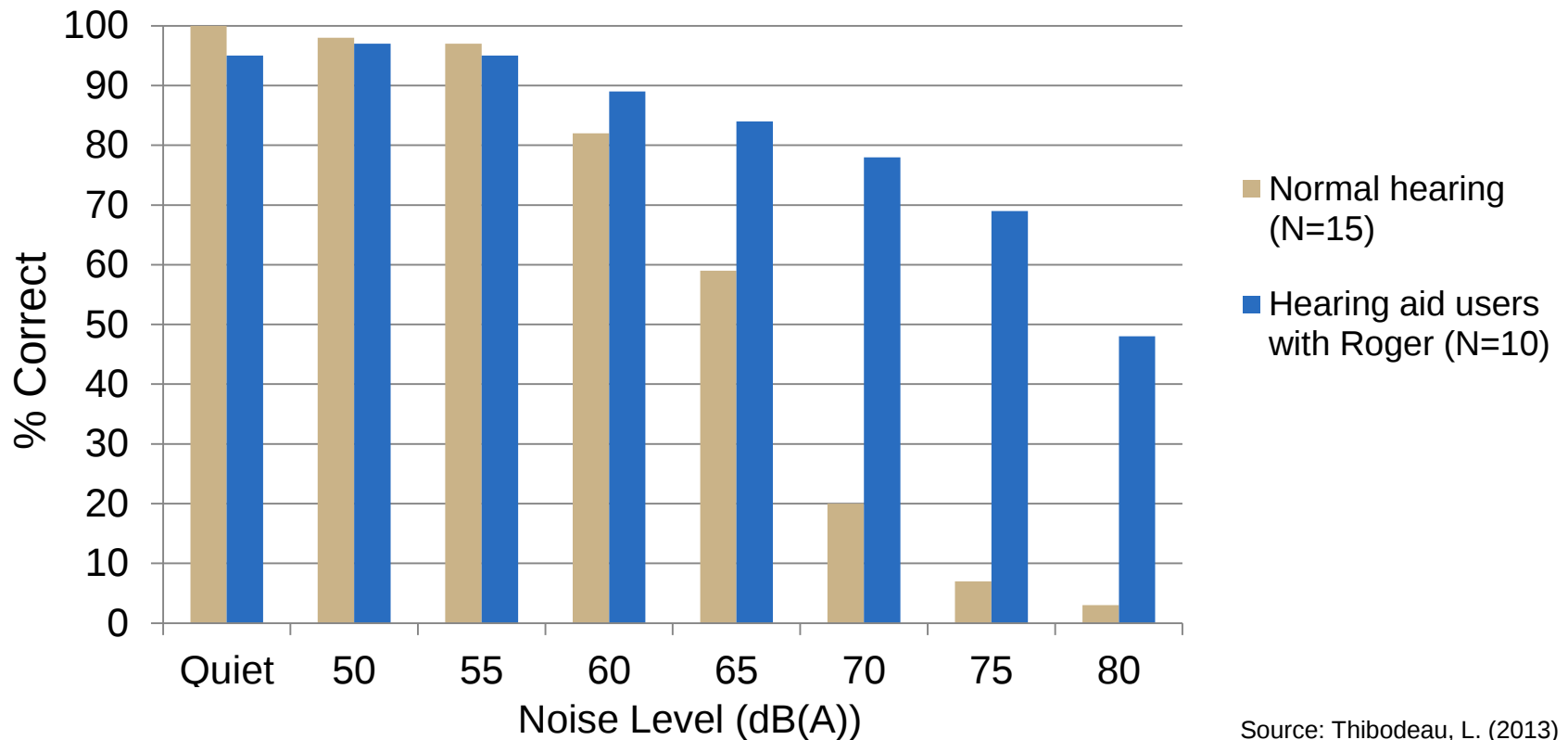
- Discreet design
- Automatic microphone mode selection
- Advanced beam forming
- Automatic gain adjustment
- Multimedia connection
- BT handsfree and headset profile
- Wideband Bluetooth (HD voice ready)
- Multi-talker network
- Silent landing
- etc.



ROGER CLIP-ON MIC – HIGH PERFORMANCE, EASE OF USE



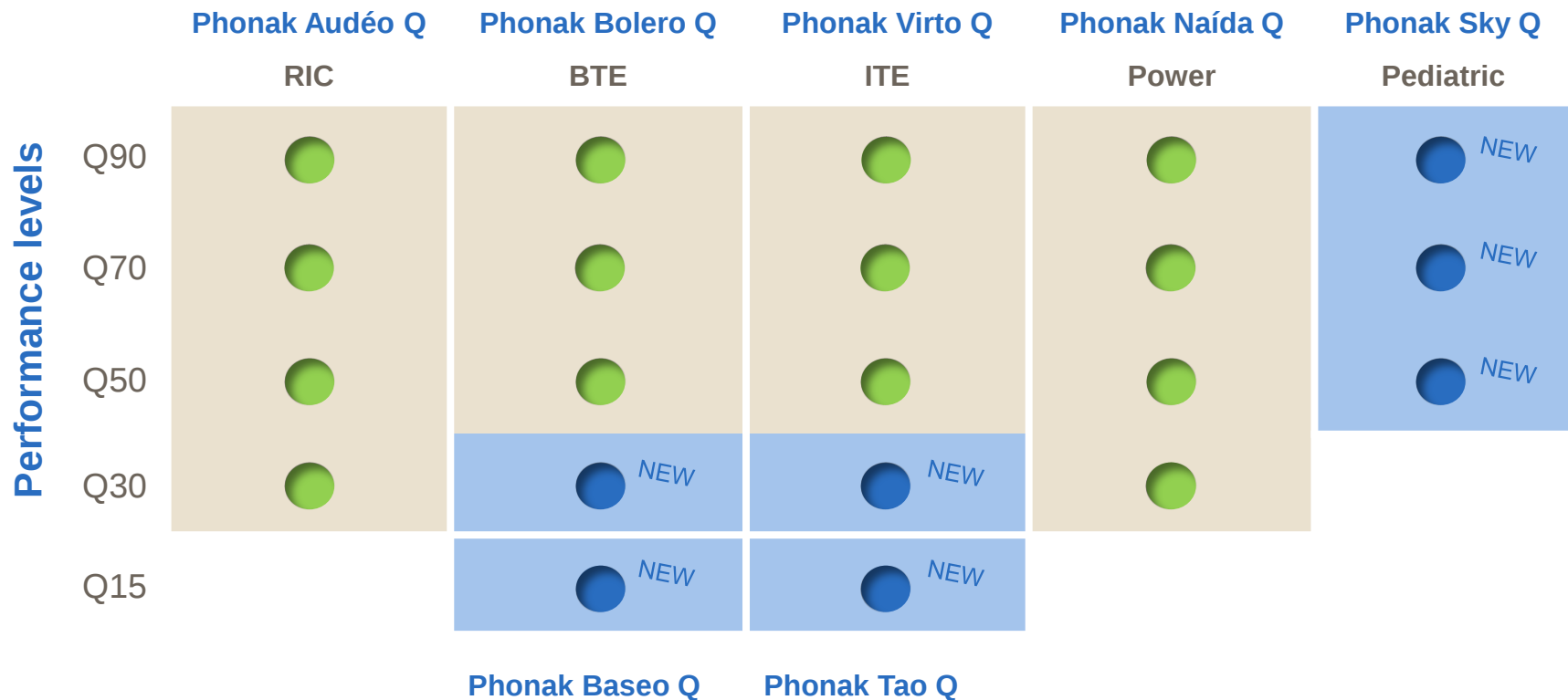
SPEECH UNDERSTANDING AT 5.5M WITH VARIOUS NOISE LEVELS



THE PHONAK QUEST PORTFOLIO

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COMPLETING THE RANGE OF SOLUTIONS ON QUEST

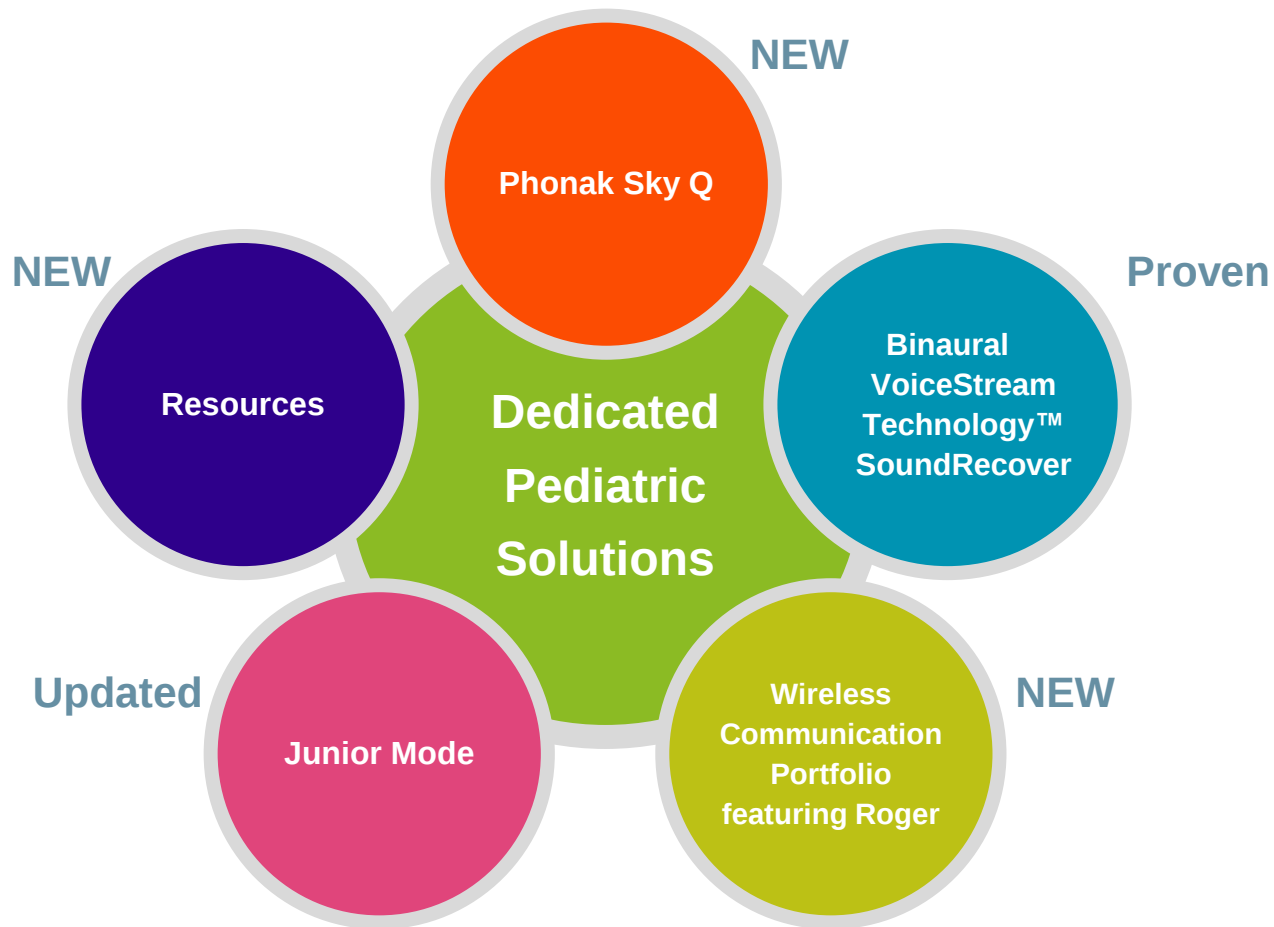


BUILDING ON THE SUCCESS OF THE PLATFORM

PHONAK PEDIATRIC SOLUTION

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DEDICATED SOLUTIONS – BECAUSE A CHILD IS NOT A SMALL ADULT



PHONAK PEDIATRIC SOLUTION

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SKY Q – CONTINUING OUR DEDICATION TO PEDIATRICS

4 models

3 performance levels

Mix & match colors

Tamperproof solutions

Reliability

Phonak Sky Q



HELPS TO FOSTER BRAND LOYALTY FOR LIFE

PHONAK PEDIATRIC SOLUTION

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FOUR MODELS



Phonak Sky Q-RIC



Phonak Sky Q-SP



Phonak Sky Q-M13



Phonak Sky Q-UP

PHONAK PEDIATRIC SOLUTION

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WIDEST COLOR RANGE

Signature



Hair & Skin



Traditional



Fun



Fashion



PHONAK COST CONSCIOUS SOLUTIONS

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DESIGNED FOR A BASIC PURPOSE

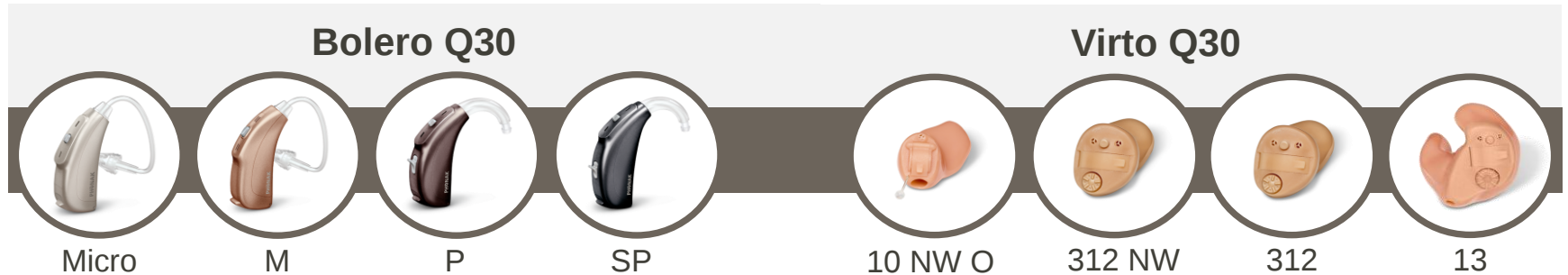


ALL PROGRAMMABLE WITH PHONAK TARGET FITTING SOFTWARE

PHONAK COST CONSCIOUS SOLUTIONS

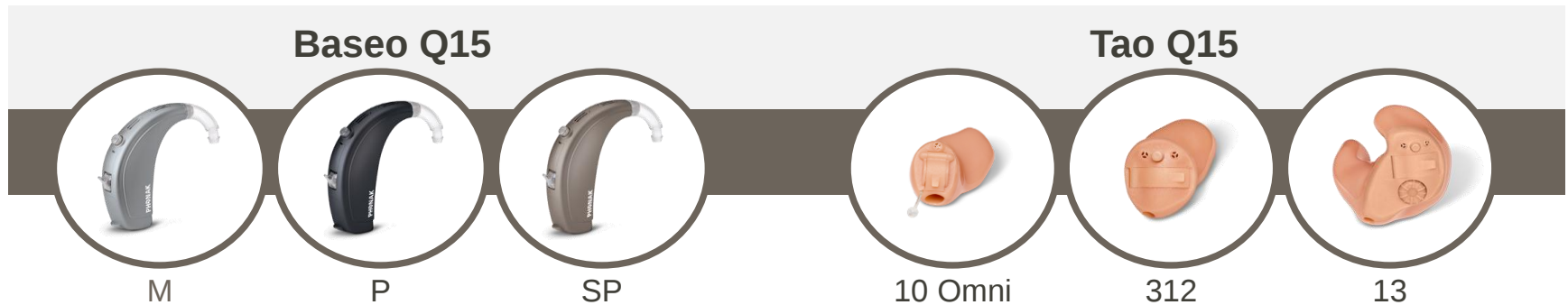
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BOLERO Q30 AND VIRTO Q30 – COMPLETING THE BTE AND ITE RANGE



- Wireless accessories
- Wireless fitting
- SoundRecover
- Everyday Automatic
- 8 channels

PHONAK BASEO Q15 AND TAO Q15 – RELIABILITY AND PERFORMANCE



- Based on Quest platform
- Target fitting software
- Fixed directional microphones
- 4 channels
- WhistleBlock
- NoiseBlock Basic
- Basic-optimized housing

TARGET MARKET – REIMBURSED SEGMENT IN GERMANY AND ASIA

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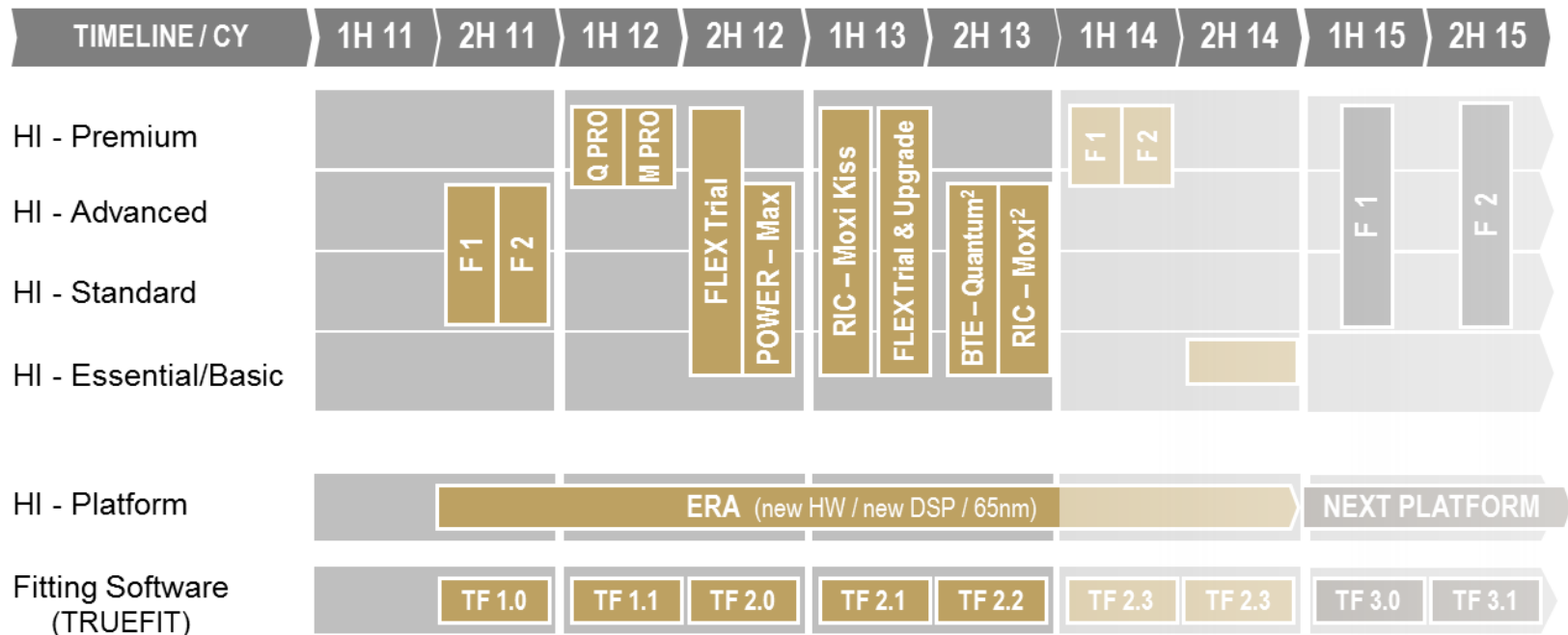
unitron

- Successful dual-brand strategy
- The new Unitron range



- New products Advanced Bionics
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PRODUCT PIPELINE: DRIVE FOCUSED PRODUCT INNOVATION



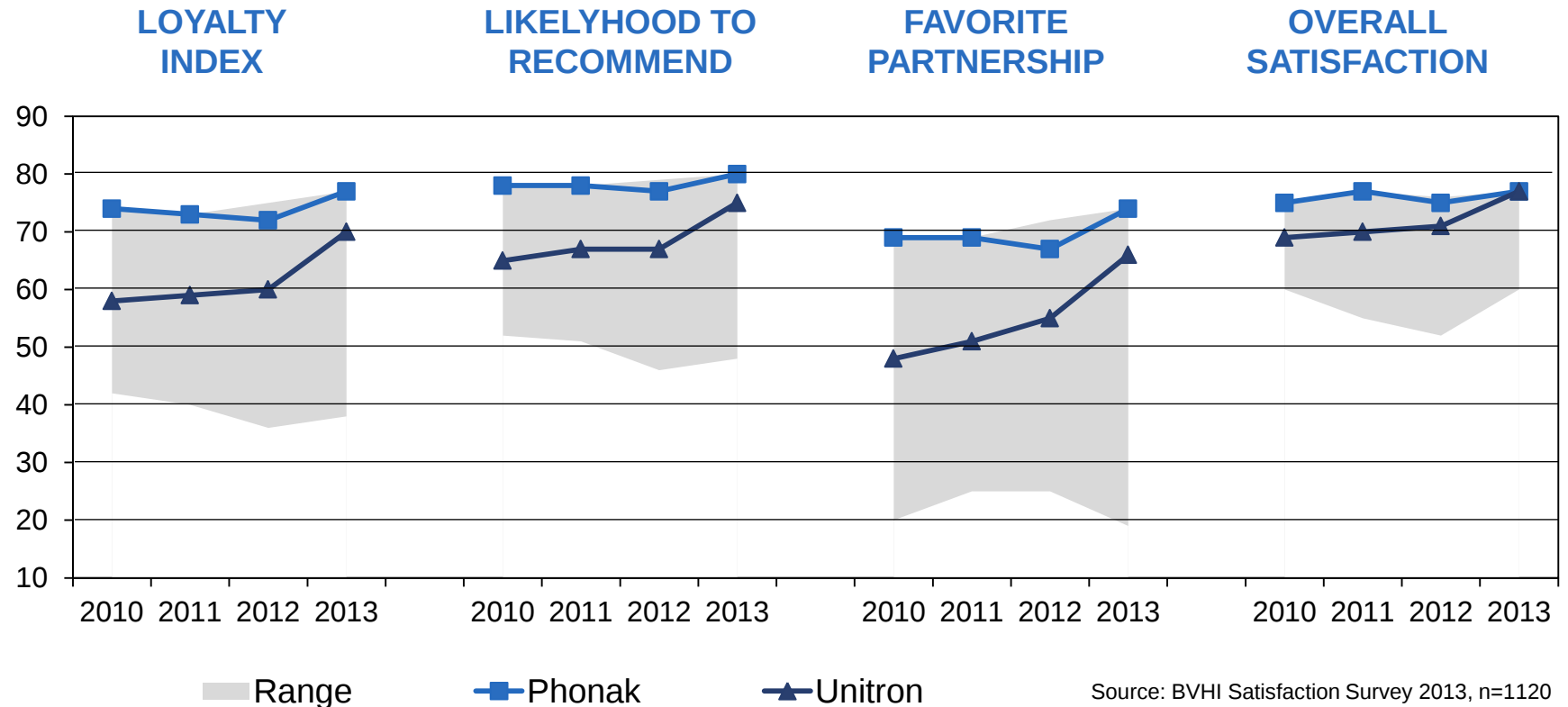
Note: Subject to change

FLEXIBLE RANGE ACROSS 3 FORMATS AND ALL PERFORMANCE LEVELS

SUCCESSFUL DUAL-BRAND STRATEGY

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GERMANY – STRONG GAINS IN CUSTOMER SATISFACTION



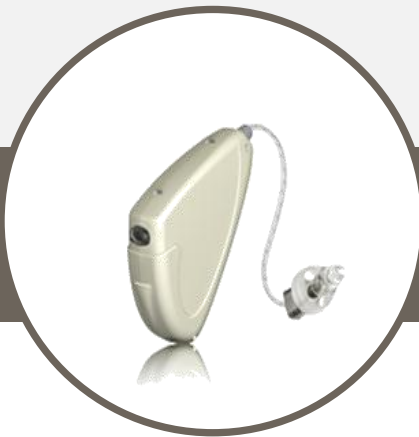
PHONAK STRENGTHENS LEADING POSITION – UNITRON IMPROVES STRONGLY

THE NEW UNITRON RANGE

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MOXI² – A CHOICE OF THREE RICs

Moxi²



Tried and true

Moxi² Kiss



Enticing and fluid

Moxi² Dura



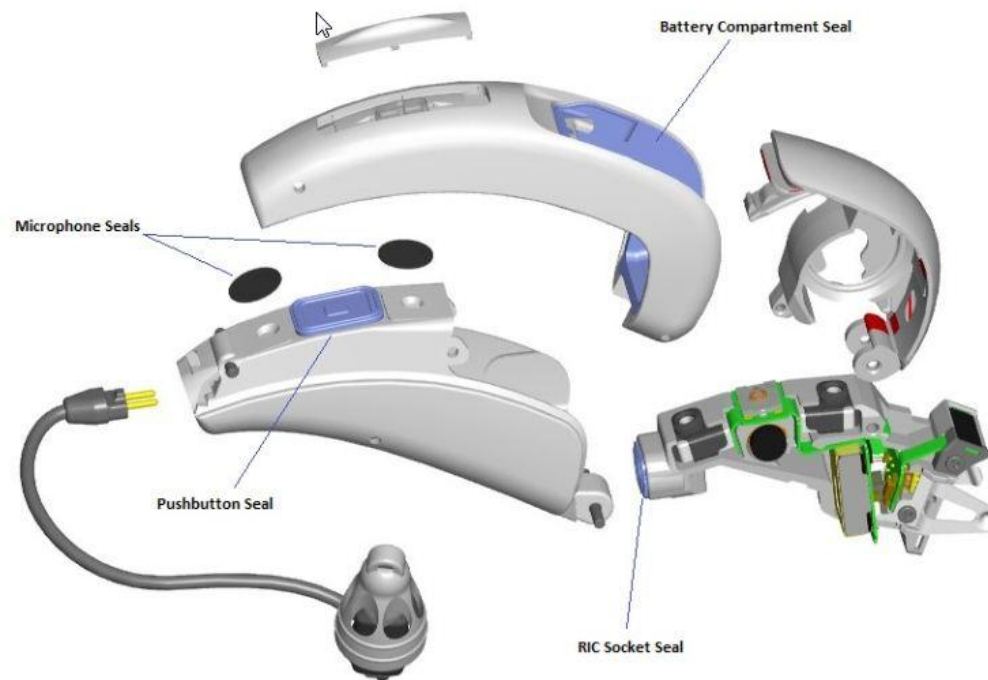
Robust and resilient

WITH A RANGE OF 11 COLORS

THE NEW UNITRON RANGE

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MOXI² DURA – DESIGNED TO BE HIGHLY ROBUST AND RESILIENT



MULTIPLE LAYERS OF PROTECTION – IP67 RATING

THE NEW UNITRON RANGE

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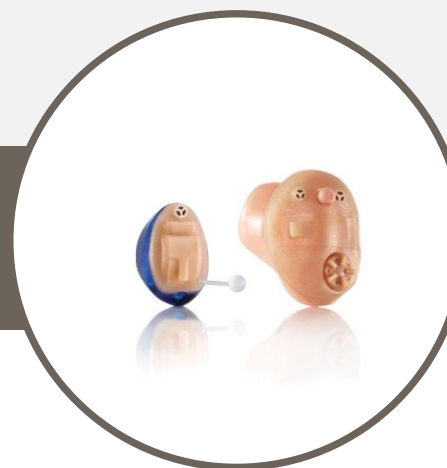
QUANTUM² – A FULL LINE-UP OF ITE AND BTE DEVICES

Quantum² BTE



- Two BTE form factors
- New S (standard) 13 BTE
- HP (high power) BTE

Quantum² ITE



- Full range of ITE form factors from ITE to IIC

INCLUDING A NEWLY STYLED 13 BTE

THE NEW UNITRON RANGE

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NEW FEATURES – UPDATED CHANNEL RESOLUTION

Performance profile		20	16	10	E
	Channels / bands	20	16	10	6
	Processing type	WDRC & linear	WDRC & linear	WDRC & linear	WDRC & linear
	Adaptive directional microphones	Multiband	Multiband	Multiband	●
Signature features					
	Automatic Program	Automatic 4	Automatic 3	Automatic 2	Manual
	SmartFocus 2	●	●		
	SmartFocus			●	●
	Binaural Phone	●	●	●	
	Tinnitus masker	●	●	●	●
	Automatic Adaptation Manager	●	●	●	●
	LearnNow	●			
	Self learning	●	●		

ALL MODELS ARE FLEX ENABLED

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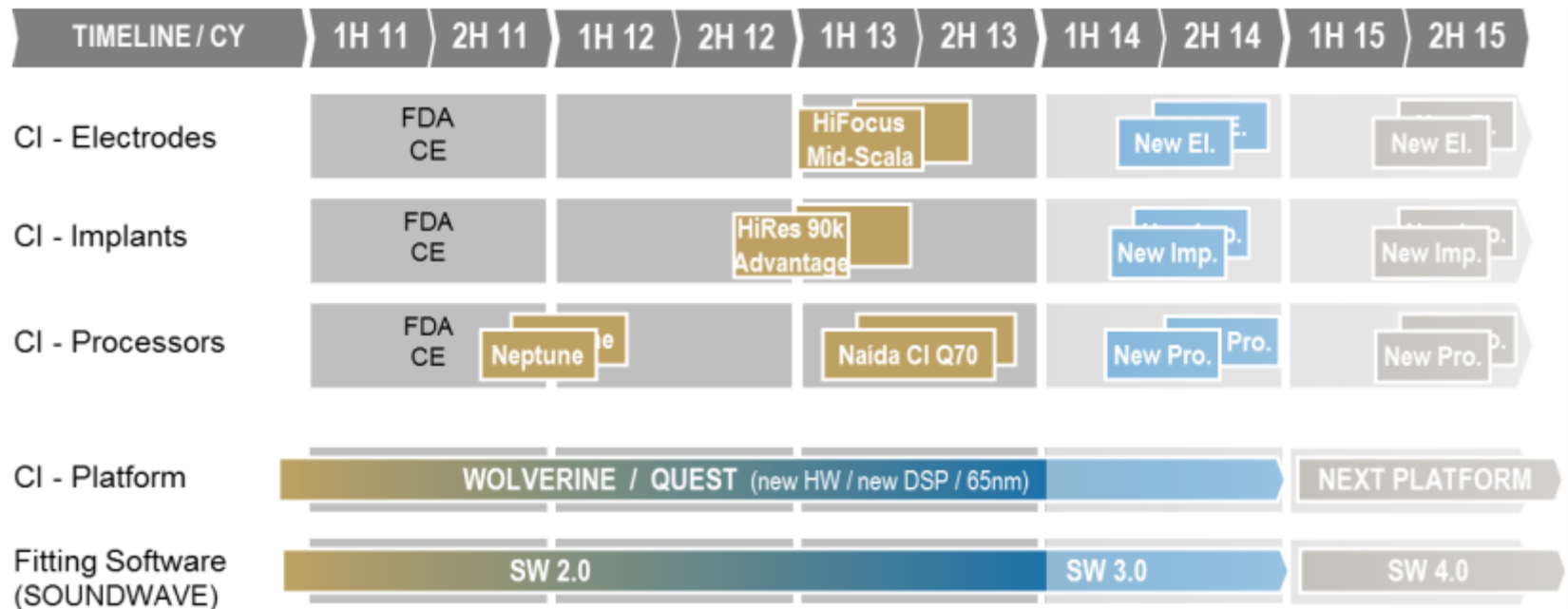
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PRODUCT PIPELINE: ACCELERATE INNOVATION RATE – LEVERAGE PH



Note: Subject to change, timing dependent upon regulatory approvals

EXPAND RANGE OF INNOVATIVE PROCESSORS, IMPLANTS, ELECTRODES

NEW PRODUCTS ADVANCED BIONICS

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UNPRECEDENTED NUMBER OF NEW PRODUCTS IN THE LAST 12 MONTHS

CI PRODUCT		TÜV – EU	FDA – US	OTHER
Naída CI Q70	Sound Processor	✓	✓	✓
HiRes™ Optima	Sound Processing	✓	✓	✓
HiFocus™ Mid-Scala	Electrode	✓	✓	✓
HiRes 90K™ Advantage	Implant	✓	✓	✓

DESIGN-INTEGRATED RECEIVER FOR ADVANCED BIONICS NAÍDA CI Q70



ROGER 17

ROGER FOR CI

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BROAD COLOR RANGE



Sand Beige (P1)



Chestnut (P4)



Silver Gray (P6)



Velvet Black (P8)



Ruby (P9)



Petrol (Q1)



Alpine White (XN)



Princess Pink (XP)



Electric Green (Q2)



Caribbean Pirate (Q3)



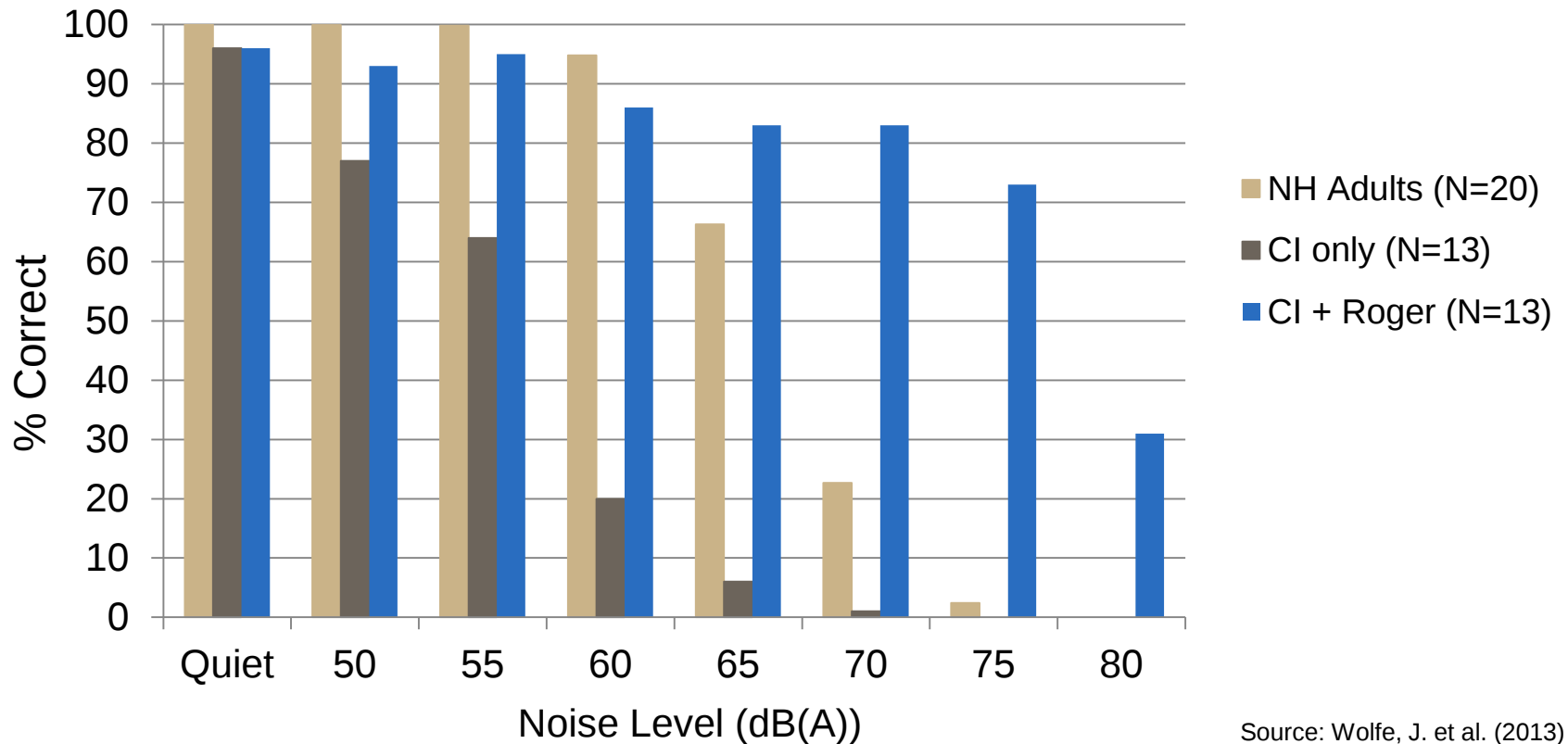
Dragon Orange (Q4)



Vanity Pink (Q5)

ROGER 17 FOR NAÍDA CI Q70

SPEECH UNDERSTANDING AT 5.2M WITH VARIOUS NOISE LEVELS



UNMATCHED SPEECH UNDERSTANDING IN NOISY SITUATIONS

THANK YOU VERY MUCH

