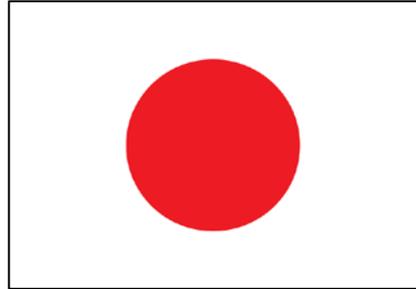


Hearing Aid Market in Japan

Masaki Ikeda
Training Manager
Starkey Japan
Yokohama, Japan



Hearing Aid Market in Japan

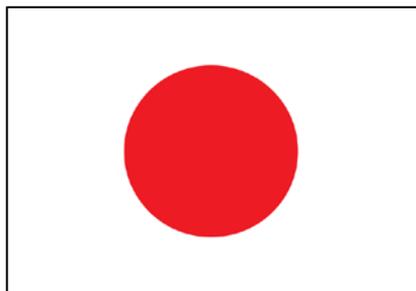
Japanese Hearing Loss Population

14 million people

127 million total population

11% Hearing Loss Rate

Very Limited Coverage



Hearing Aid Market in Japan

OTC Hearing Aids Sold in 7,651 Shops

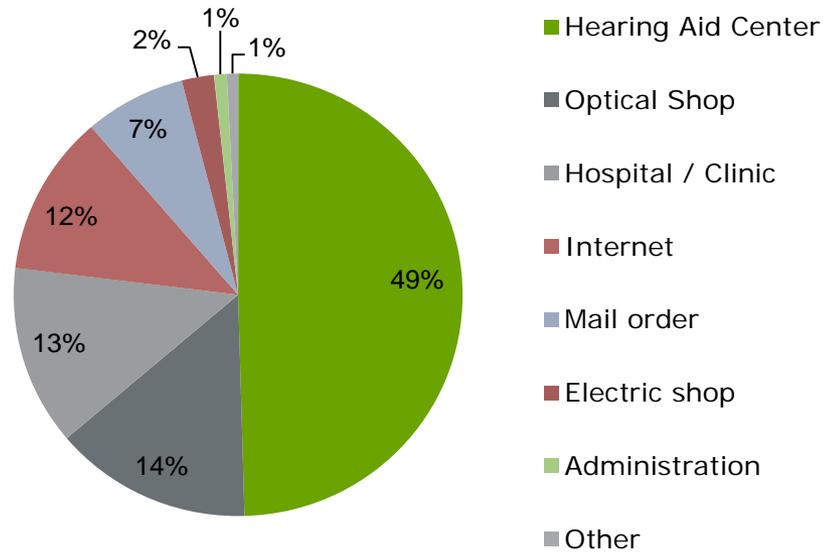
14 million people with Hearing Loss

1,830 Hearing Impaired/OTC Shop

Internet and Mail-Order Sales Also Available



Hearing Aid Distribution Channel



(JapanTrak 2015)



Overall satisfaction

	France	UK	Germany	US	Japan
Overall satisfaction 2012	80%	72%	77%	74% (2008)	36%
Overall satisfaction 2015	84%	70%	77%	81% (2014)	39%

Very Low Satisfaction Rates



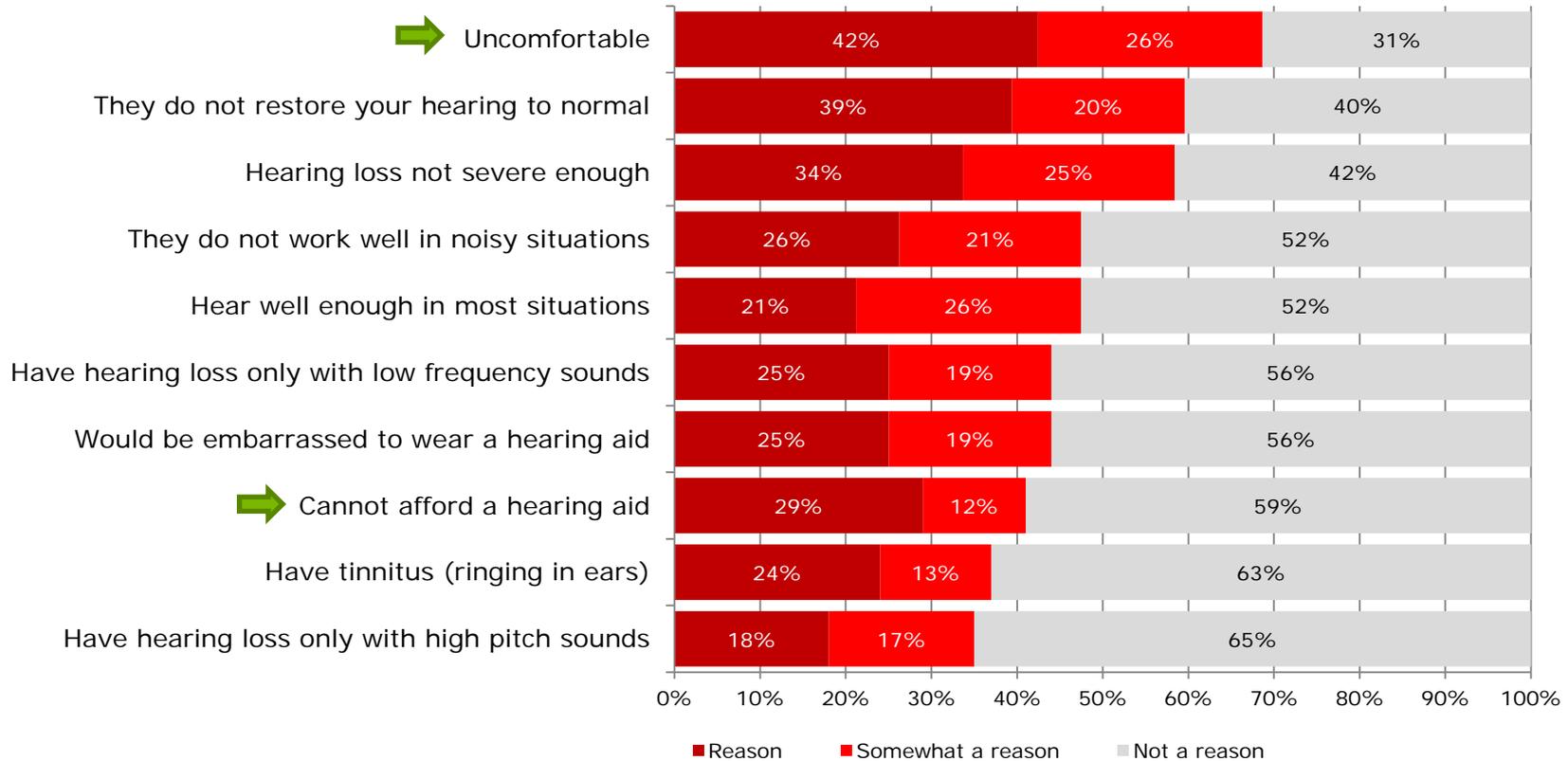
Hearing Aid adoption rates

Country	France	Germany	UK	USA	Japan
Adoption rates %	30.4	34.0	41.1	30.2	13.5

Adoption rate = Percent of people with self-reported hearing loss who use HA's



Top 10 reasons for not having a hearing aid



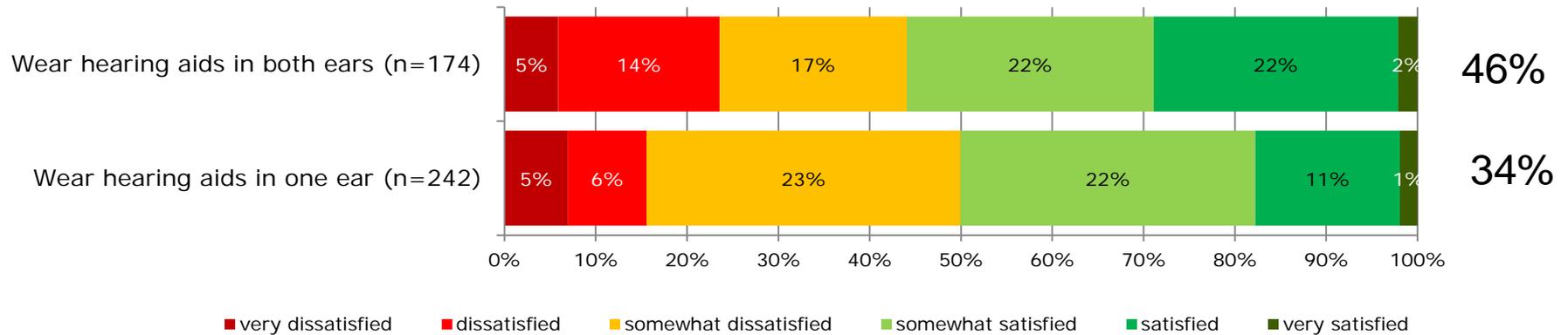
Base: non owners Top 50% HL: n=208



Binaural fitting rates

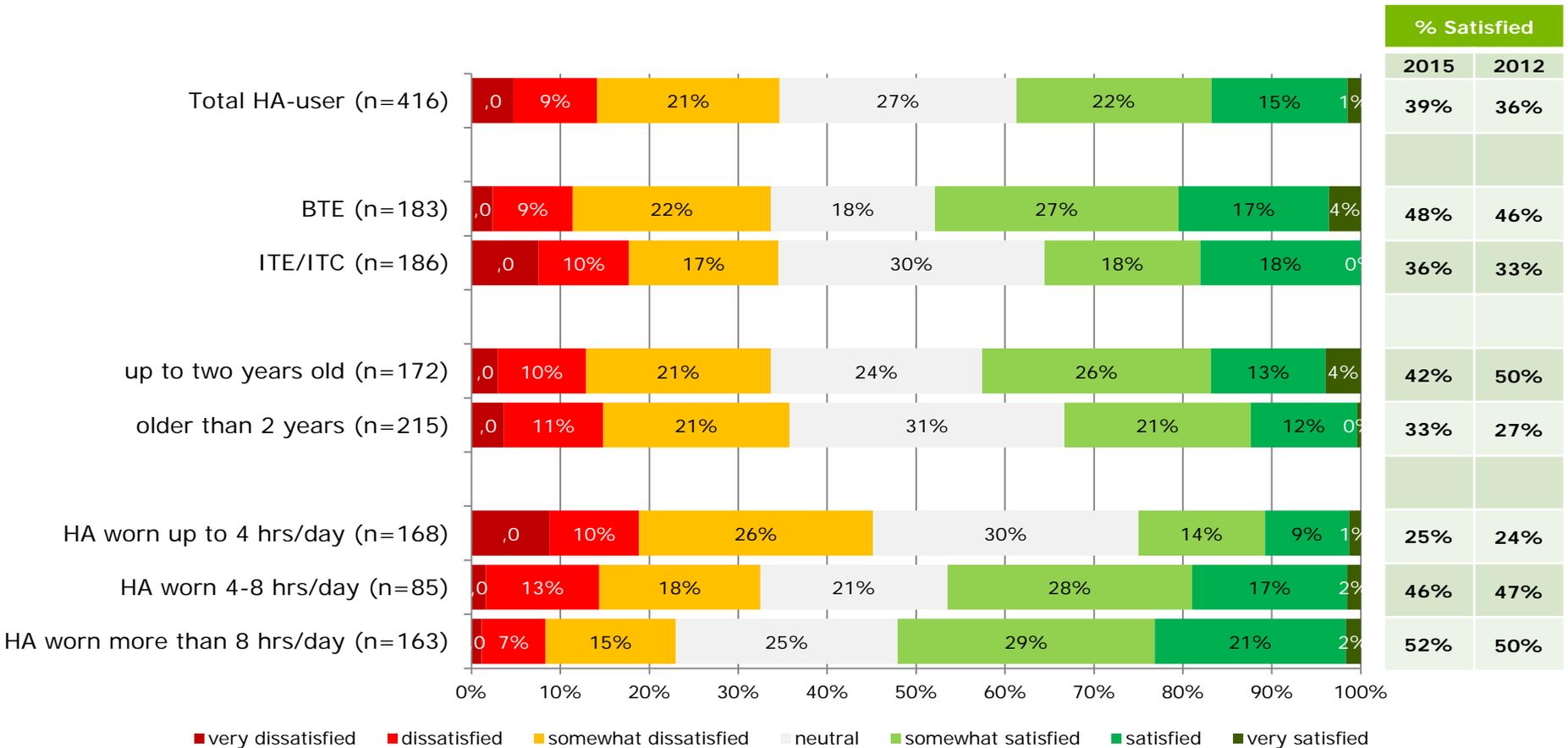
Country	France	Germany	UK	USA	Japan
Binaural rate %	70	75	61	72	46

Satisfaction Rates





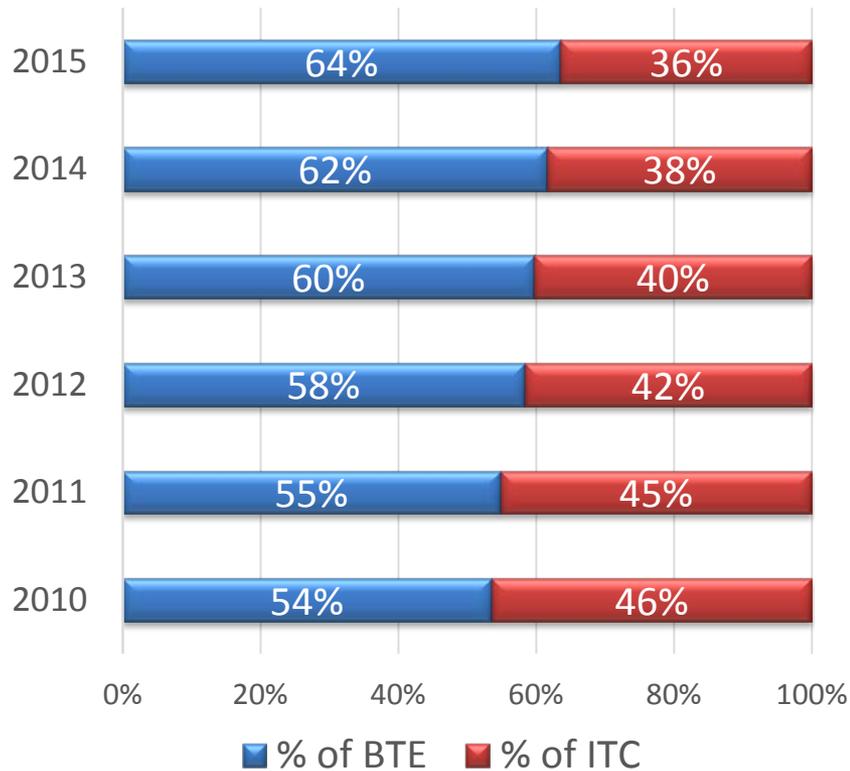
Overall satisfaction with HA increased from 36% to 39%. JapanTrak 2012 caused alarm and new focus on professionalism





Same technology trend as US/Europe

BTE V.S. ITE in Japan: by JHIMA



- ITE rate decreasing every year.
- BTE trend up every year



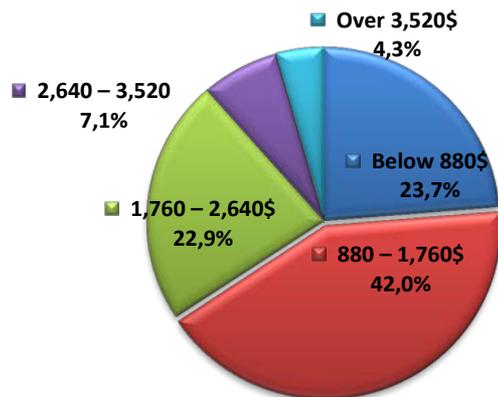
Hearing Aids and PSAPs

- We can't be sure all respondents actually have hearing aids – some may have PSAPs
- People are confused: consider PSAPs and OTC hearing aids "the same thing" = giving hearing aids a bad name.



Retail price trend: Low

Suggested retail price by Units:
Total 534,670
Surveillance period: 2015/Jan. to Dec. by JHIMA



- 23.7% less than 880\$
- 42.0% between 880-1,760\$
- 22.9% between 1,760 – 2,640\$.



Three models

Europe	Japan	USA
<ul style="list-style-type: none">• High level of coverage• High level of professional involvement• No OTC/PSAPs for hearing loss <p>Result:</p> <ul style="list-style-type: none">• Best adoption rates• Good satisfaction rates	<ul style="list-style-type: none">• Low level of coverage• Less professional involvement• Unregulated: allows OTC HA's and PSAP hearing loss claims <p>Result:</p> <ul style="list-style-type: none">• Worst adoption rates• Worst satisfaction rates	<ul style="list-style-type: none">• Low level of coverage• High level of professional involvement• No OTCs/PSAPs not for hearing loss <p>Result:</p> <ul style="list-style-type: none">• Middling adoption rates• Good satisfaction rates



Summary

- Hearing aids are readily accessible in Japan
- Do-it-yourself OTC and PSAPs sold for hearing loss
- Therefore, essential professional service is often skipped

CONCLUSION: Access does not equal adoption or good public health outcomes