Digital transformation in hearing healthcare

Francois Julita, Director Digital Experience, Sonova
A story about ...

Change
Audiology and Digital Transformation

Francois Julita, Director Digital Experience
Francois Julita 100%

European 99.8%
- French & German 45.4%
  Switzerland
- Italian 5.9%
- British & Irish 5.8%
- Balkan 3.4%
- Iberian 1.5%
- Eastern European 0.3%
- Broadly Northwestern European 26.0%
- Broadly Southern European 6.7%
- Broadly European 4.8%

Sub-Saharan African 0.1%
- West African 0.1%

Unassigned 0.1%

See all tested populations
A day in the life of... Ben
Ben
Taxi driver
in London
Pauline
Hotel Manager
in Paris
Jorge
FedEx Driver
in Mexico City
### UberCARGO

**UberBLACK**

<table>
<thead>
<tr>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Fare</td>
<td>$20</td>
</tr>
<tr>
<td>$1.60 per minute</td>
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</tbody>
</table>

**uberTAXI**

<table>
<thead>
<tr>
<th>Description</th>
<th>Cost</th>
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</thead>
<tbody>
<tr>
<td>Base Fare</td>
<td>$4.50</td>
</tr>
<tr>
<td>$4.50 per kilometer</td>
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</tbody>
</table>

**Minimum Fare**

- UberBLACK: $40
- UberTAXI: $20

**Sample Vehicles:** Toyota Hiace, Hyundai H1, Nissan Urban
Bruno
Bus driver in Switzerland
Simon
General Practitioner in Atlanta
Ask a Doctor on your Android Phone
Anytime, anywhere
Hearing aids and expert service online

Blamey Saunders hears are pioneers in the science of hearing. We invented an effective low-priced, self fit hearing aid system. Test your hearing, buy it online, adjust it yourself, and our expert team support you along the way.

Professor Peter Blamey and Doctor Elaine Saunders
OMG!
DIGITAL TRANSFORMATION IN ALL INDUSTRIES
Drivers

- Consumer behaviour, convenience
- Web, apps, cloud
- Cost pressure, automation
ACTIVE
SCEPTICAL
DEMANDING
AUTONOMOUS
ACTIVE
SCEPTICAL
DEMANDING
AUTONOMOUS
"I want to be empowered"
Modern consumers

2016: 25%

2020: 40%
Medical devices or consumer goods?
Surgeons call on HoloLens during reconstructive surgery.

mHealthNews 30.01.2018
Now, Bose want to help you hear every word of your conversations.

hearingphones.bose.com
What business are we in?
The BIG picture
Evolution of smart, connected systems

HBR Nov 2014, How Smart, Connected Products Are Transforming Competition. Michael Porter
4 dominant patterns

M  Monitor
O  Optimize
C  Control
A  Autonomy
Evolution of smart, connected systems

HBR Nov 2014, How Smart, Connected Products Are Transforming Competition. Michael Porter
What business are we in?
It’s here
Assistive hearing is the next big thing for wireless earbuds.

Bragi’s and Mimi Project Ears is fusing wireless audio with hearing aids.

Both companies are working on a Personal Sound Amplification Product (PSAP) - backed with FDA approval.
Let’s put it in perspective
2014, Phonak Remote Support

Phonak Remote Support 2014 for Veterans Affairs (VA), USA
What did we learn?

50 user
100+ sessions

65 y
average age

35 min
Average travel time

Phonak Remote Support 2014, University of Vanderbilt study
Users reported…

- **88%** Prefer tele sessions under difficult conditions
- **92%** Would recommend tele sessions to other users
- **64%** Would prefer tele sessions if offered a choice

*Phonak Remote Support 2014, University of Vanderbilt study*
Tele sessions had **stable connection**

- 86%

Tele sessions as **efficient as face-to-face**

- 80%

Tele sessions **satisfied with outcome**

- 82%

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Phonak Remote Support 2014, University of Vanderbilt study
Asynchronous settings exchange

Synchronous real-time tele-session

Up/Download

Self-Adjust App

No Real-time

Limited fitting capability
Additional tool for HCP
No user feedback

Real-time

User App

100% of fitting capability
Audéo B-Direct  
VA User App  
Phonak Target Regular Fitting Software

Real-time  
User App  
Real-time tele-session

Synchronous real-time tele-session  
100% of fitting capability

Phonak Remote Support 2017 for Veterans Affairs (VA), USA
Let’s have a look...
OMG?

Yes, the role will (have to) change, but it won’t disappear
Assumption

Hearing aids

Commercial, PSAP, OTC

HA, Medical, CI, Pediatric, Complex
Adoption

Hearing Aid Market Penetration Estimates (United States)

Year of Report

Percent

Opportunities

Hearing aids

No Stigma

More customers
How smart, connected products are transforming competition
Michael E. Porter
Harvard Business Review

The patient will see you now
Eric Topol,
Bestselling medical book of 2015
Let’s embrace the change and let’s offer great hearing experience to our future, modern customers.

Thank You!