



Representative survey by the
Institut für Demoskopie Allensbach on behalf of eurocom e. V.
2023 survey results

Medical aids

**Effective and
established therapy
for a better quality of life
in everyday life**

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Introduction

ORTHOPAEDIC COMPLAINTS AND VENOUS DISORDERS AS WIDESPREAD DISEASES

A large proportion of the German population suffers from musculoskeletal disorders: 57 per cent of those who do not exercise or exercise for less than one hour per week complain of musculoskeletal problems, such as back pain. But even among those who are more physically active, the figure is very high at 44 per cent.¹

In addition to the high prevalence of orthopaedic complaints, a clear majority of around 90 per cent also experience changes in their venous system: among 40- to 80-year-olds in Germany, 36.5 per cent have mild venous changes (e.g. spider veins), 13.3 per cent have varicose veins and 40.8 per cent already have manifest chronic venous insufficiency.²

This means that these orthopaedic and vascular complaints are among the most common diseases, which can have an impact not only on the quality of life of those affected, but also on the economy as a whole through sick leave, absenteeism and early retirement. General practitioners, vascular specialists, orthopaedic surgeons and sports physicians rely on options including conservative therapy with medical aids to treat these conditions. They prescribe medical compression stockings, orthopaedic shoe insoles, support bandages and orthoses. These medical aids support those affected in their everyday lives by alleviating symptoms and improving their mobility.



Up to

57%

of Germans suffer from musculoskeletal disorders¹

REPRESENTATIVE SURVEY ON THE USE AND BENEFITS OF MEDICAL AIDS IN EVERYDAY LIFE

In 2014 and 2019, the association eurocom commissioned the Institut für Demoskopie Allensbach (Allensbach Institute for Public Opinion Research) to conduct a representative population survey to examine the use, benefits and product quality of medical aids. The results were clear and underlined the high value of these products in conservative therapy. In order to identify possible changes in usage – including those caused by the COVID-19 pandemic – and subjectively perceived benefits, eurocom commissioned the Institut für Demoskopie Allensbach to conduct another survey in early 2023. Around 1,300 users (aged 16 and above) of medically prescribed compression stockings, orthopaedic shoe insoles, support bandages and orthoses were included in the survey. The results of this latest representative survey confirm that medically prescribed medical aids play a crucial, indispensable role in patients' everyday lives and that users continue to rate the benefits of these aids highly. For the majority of the survey participants, medical aids were a good way to overcome the restrictions and shortages in medical care during the COVID-19 pandemic.

This publication is a summary of the extensive data from the latest survey conducted in January and February 2023. Questions were asked about product use, the participants' assessment of benefits, product quality, and the support and advice provided by doctors and specialist shops. The survey design and data collection method are explained on page 40. Further information on medical aids and their use for relevant indications and clinical pictures can be found at www.eurocom-info.de.

Medical aids as essential everyday tools

EXTENSIVE AND CONSISTENTLY HIGH USAGE

Medical aids can be used in a variety of ways, including to ensure the success of medical treatment, but also to prevent the onset of disability, avert illness or avoid existing symptoms growing worse.³ They therefore provide indispensable support and have become an integral part of patients' everyday lives. Medical compression stockings, orthopaedic shoe insoles, support bandages and orthoses are included in this category of medical aids.⁴

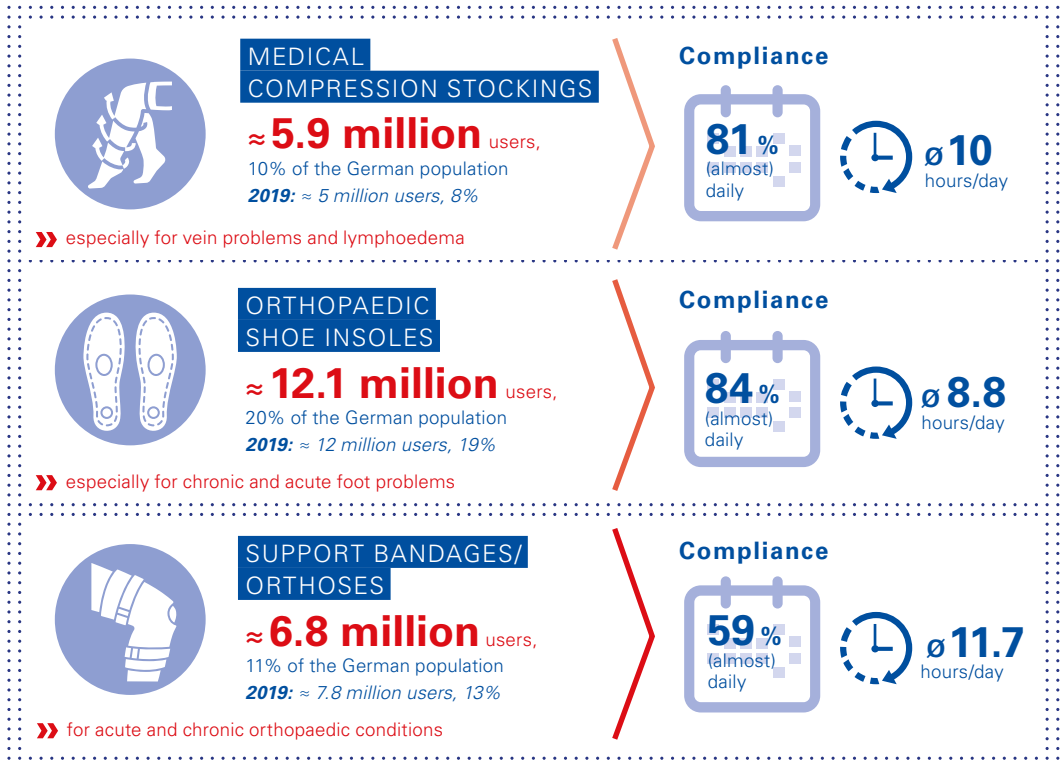
The latest representative survey shows that around 12.1 million (20 per cent of the total population) of people aged 16 and over in Germany wear orthopaedic shoe insoles – with a slight upward trend compared to the 2019 survey (2019: 19 per cent, 11.9 million people).

Around 5.9 million people over the age of 16, or 10 per cent of the total population, use medically prescribed compression stockings. This figure has also increased since the last survey (2019: 8 per cent, 5.0 million people).

During the period covered by the latest survey, 11 per cent of the German population wore support bandages or orthoses prescribed by a doctor. This corresponds to around 6.8 million people – 1 million fewer than in 2019 (7.8 million; 13 per cent in 2019). The impact of the COVID-19 pandemic may be a factor here. Since support bandages and orthoses are often used in acute settings after sports injuries and post-operatively, the limited opportunities for sporting activities and the postponement of elective surgeries during lockdown may be reasons for this decline in prescribed support bandages and orthoses. In fact, a survey published in February 2021 in the German-speaking region of Europe confirmed that the COVID-19 pandemic and the measures resulting from this led to a significant decline in sports participation across all genders and age groups. This was particularly pronounced among male respondents aged 16 to 26 and 27 to 39: 68 per cent and 53 per cent respectively reported that they had been exercising less than before the pandemic.⁵ In addition, orthopaedics/trauma surgery was extensively affected by changes in elective surgery (including significant reductions in knee replacement surgeries and arthroscopic surgery on joint cartilage and menisci).⁶

NUMBER OF USERS OF MEDICAL AIDS ON THE RISE

Question: Which medical or orthopaedic aids prescribed by your doctor do you currently use occasionally or permanently?



DAILY USE FOR MANY HOURS

The survey results on wearing intensity show that the products are actually being used as prescribed by doctors. For example, 81 per cent of users of medical compression stockings use their medical aid (almost) daily. The figure for orthopaedic shoe insoles is also very high at 84 per cent, highlighting the high level of patient compliance with treatment. Support bandages and orthoses are worn (almost) daily by 59 per cent of respondents. The lower value for these orthopaedic aids is due to the areas of application for support bandages and orthoses. They are often used for acute complaints and injuries or even post-operatively, i.e. for temporary conditions. However, when support bandages or orthoses are used, they are worn for an average of 11.7 hours per day. Similarly high values are reported by wearers of medical compression stockings (10.0 hours) and orthopaedic insoles (8.8 hours).

THERAPY BRIDGING DURING THE COVID-19 PANDEMIC

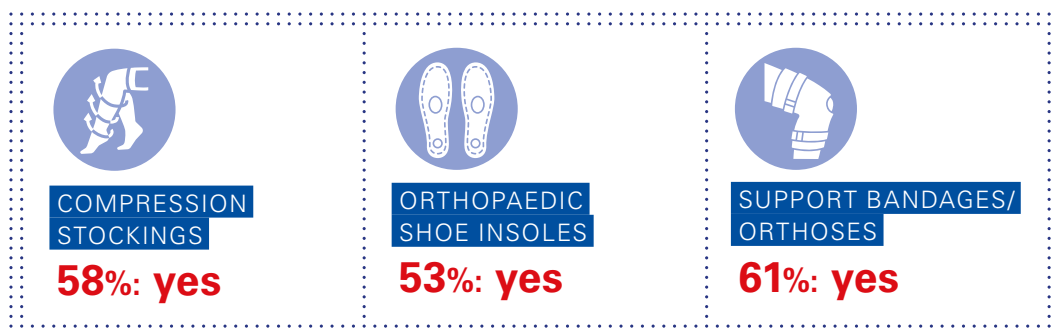
As the survey covers a large proportion of the COVID-19 pandemic, it provides interesting information on the use of medical aids during the challenging pandemic and any medical supply shortages, in addition to general usage and daily wearing time. The results of the survey highlight the crucial role played by medical aids in everyday life, as they were used by users during the COVID-19 pandemic to bridge the gap between treatments – for example, when it was not possible to attend an appointment with a doctor and/or physiotherapist, or when people decided to forego doctor’s appointments out of caution.

For example, 58 per cent of people who wear medical compression stockings report that these aids helped them get through the period when they were unable to see a doctor. When it comes to support bandages and orthoses, 61 per cent of respondents confirm that these medical aids provided them with crucial support. With regard to orthopaedic insoles, one in two people (53 per cent) see them as a good temporary solution during the COVID-19 pandemic.

These figures show that over half of users benefited from the use of medical compression stockings, orthopaedic shoe insoles and support bandages or orthoses during this challenging and difficult time of supply shortages, enabling them to cope better with everyday life. This underscores the high value of medical aids as important everyday tools – even in difficult times.

USE OF MEDICAL AIDS TO BRIDGE THE GAP IN THERAPY DURING THE COVID-19 PANDEMIC

Question: Did your aids help you to cope well during the period when you were unable or unwilling to go to the doctor or physiotherapist?



LONG-TERM USE WITH HIGH ACCEPTANCE

Medical aids are highly accepted by users, not only to bridge the gap in therapy during the temporary challenges of the COVID-19 pandemic, but also for long-term use as part of ongoing treatment. After the initial prescription, patients usually receive follow-up prescriptions for orthopaedic shoe insoles, medical compression stockings and support bandages or orthoses, especially for chronic conditions. And particularly in the case of chronic diseases, acceptance of the prescribed products is crucial for therapy adherence and thus for the success of the therapy. The latest survey confirms the high level of acceptance over a long period of time. The patients surveyed have been relying on orthopaedic shoe insoles, for example, for an average of 8.1 years. For medical compression stockings, the average is 6.9 years. Since support bandages and orthoses are often prescribed for acute complaints and injuries and for specific joints, the period of use for these prescribed aids is significantly shorter (2.4 years on average), with support bandages and orthoses being used for over 1.5 years on the upper extremities (hand and arm) and for over 4.4 years on the back, which is often chronically affected.

The overall results on the use of medical aids show that these are firmly established in the lives of users and have become an indispensable part of everyday life. On the one hand, convinced users were able to rely on medical aids as a stopgap measure until their next possible doctor's appointment during the challenging COVID-19 pandemic. On the other hand, they also trust the aids in the context of long-term or recurring therapy, which is reflected in their long-term and consistent daily use.

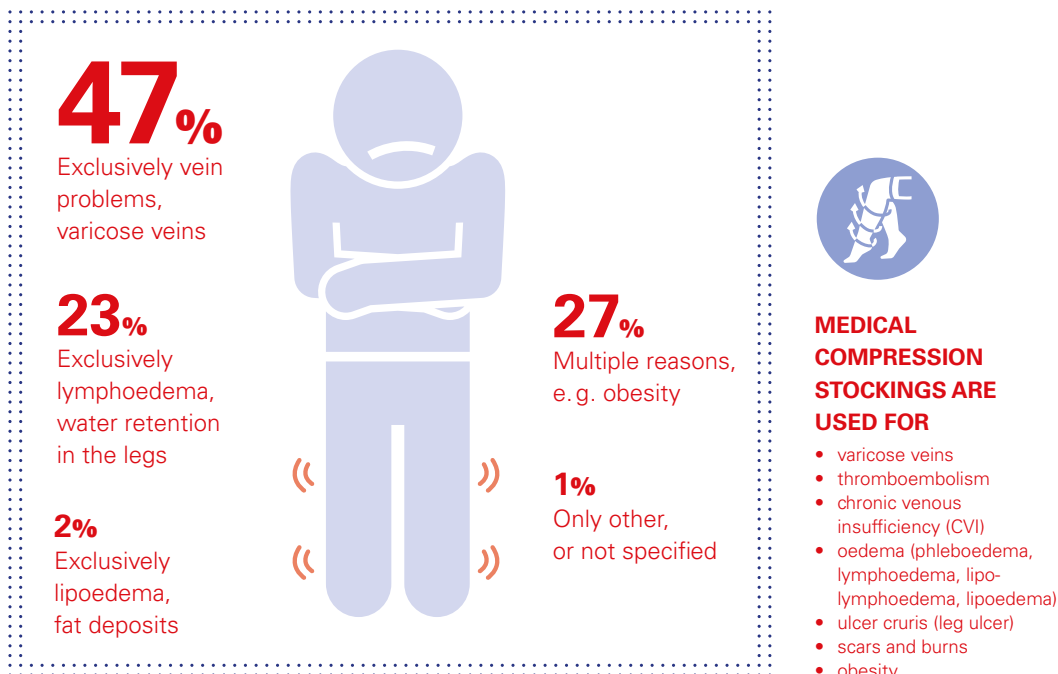
Medical aids as an important pillar of therapy

PRESCRIPTION OF MEDICAL COMPRESSION STOCKINGS, ESPECIALLY FOR VENOUS DISORDERS AND LYMPHOEDEMA

Medical compression stockings are part of guideline-based therapy for conditions such as venous and lymphatic disorders and lipoedema.⁷ Almost half of the survey participants (47 per cent) have been prescribed medical compression stockings by their doctor due to venous problems (e.g. varicose veins). In 23 per cent of cases, lymphoedema is the reason for the prescription. Medical compression stockings are used to treat lipoedema in 2 per cent of cases. More than one indication was the reason for a prescription in 27 per cent of cases. Older patients and people who are severely overweight, in particular, wear medical compression stockings for a number of reasons.

REASON FOR PRESCRIBING MEDICAL COMPRESSION STOCKINGS

Question: What was the specific reason why your doctor prescribed compression stockings for you?



These survey results confirm the high relevance of guideline-compliant, conservative therapy with medical compression stockings – especially in patients with diseases of the venous and lymphatic systems, but also in patients with comorbidities such as obesity.⁷

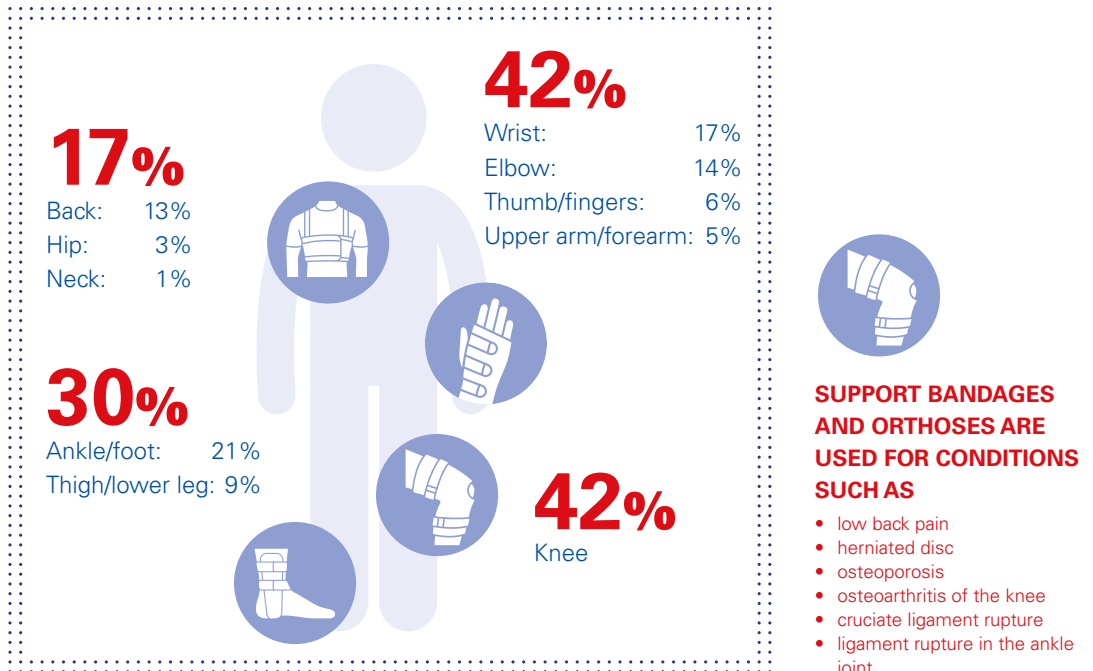
DIVERSE, JOINT-SPECIFIC APPLICATION OF SUPPORT BANDAGES AND ORTHOSES

Support bandages and orthoses have a function-securing effect.³ Their joint-specific use is therefore of great importance both in acute settings after a (sports) injury and in cases of chronic complaints or post-operatively. This is confirmed by the latest survey: 45 per cent of respondents were prescribed a support bandage or orthosis due to chronic complaints and 40 per cent due to acute pain. In addition, 36 per cent received orthopaedic aids after an injury and 21 per cent after an operation. Only 5 per cent were prescribed a support bandage or orthosis as part of a rehabilitation programme (multiple answers were possible). The information provided on the reasons for prescriptions shows a slight shift between the latest survey and the previous survey in 2019, with an increase of five percentage points for chronic conditions and a decrease of four percentage points for operations. The COVID-19 pandemic and the associated postponements of elective surgeries may be a decisive factor here.

There are also significant differences in the areas of application according to age group. People under the age of 45 are often given a support bandage or orthosis after injuries (57 per cent). The figure is 30 per cent among users aged 45 to 64, while it is only 20 per cent among those over 65. The opposite picture emerges for chronic complaints: these are the main reason for a prescription among people aged 65 and over (56 per cent), followed by those over 45 (52 per cent). Among those under 45, only 26 per cent are prescribed a support bandage or orthosis due to chronic complaints.

USE OF SUPPORT BANDAGES OR ORTHOSES

The respondents wear a support bandage or orthosis for...



At 42 per cent each, the knee and upper extremities (wrist, elbow, thumb/fingers, upper arm/forearm) are the most common areas of application for support bandages and orthoses. Meanwhile, 30 per cent of respondents are prescribed these aids for the lower extremities (foot/ankle, thigh/lower leg, excluding the knee). Finally, 17 per cent of respondents have received a support bandage or orthosis for the back/neck/hip areas.

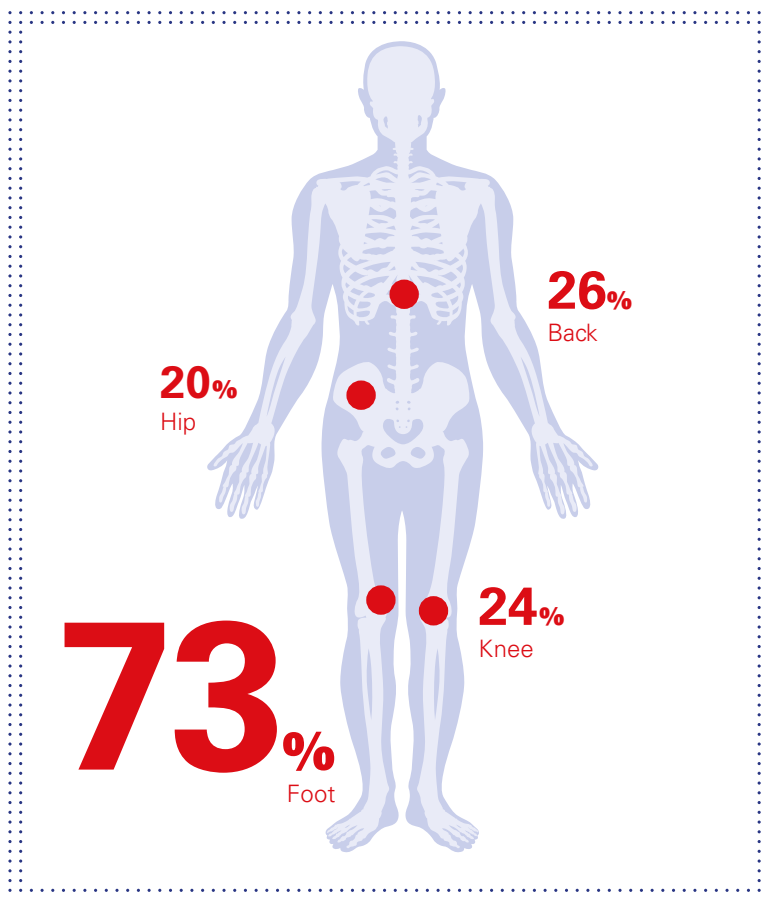
These results show that functional therapy with support bandages and orthoses is relevant for use in all age groups and that all joints and structures can be covered by this conservative therapeutic measure.

ORTHOPAEDIC SHOE INSOLES FOR FOOT, BACK AND KNEE PROBLEMS

Orthopaedic insoles are functional orthoses designed to support, cushion or correct foot deformities, specifically to relieve pressure or redistribute the load on the soft tissues of the foot.³ Chronic complaints (66 per cent) and acute pain (38 per cent) in the musculoskeletal system are the main reasons for seeking help from a doctor. Post-operative treatment (8 per cent), injuries (8 per cent) or rehabilitation measures (5 per cent) are significantly less common reasons for doctors to prescribe orthopaedic insoles.

COMPLAINTS THAT LED TO THE PRESCRIPTION OF ORTHOPAEDIC SHOE INSOLES

Multiple answers possible



Orthopaedic shoe insoles are primarily prescribed due to foot problems (73 per cent). Since insoles play an important role in supporting the entire musculoskeletal system and movement, 26 per cent of patients are prescribed orthopaedic insoles for back problems, 24 per cent for knee problems and 20 per cent for hip problems. These percentages underscore not only the relevance of orthopaedic shoe insoles for foot deformities, but also their use in providing relief in the event of misalignments of the knee, hip and spine.

PATIENT-SPECIFIC COMBINATION THERAPY WITH MEDICAL AIDS

The human body's supporting structure forms a functional unit with the musculoskeletal system. This holistic view is also reflected in the prescription of medical aids. For example, 16 per cent of users of support bandages and orthoses also received orthopaedic insoles, and 12 per cent of users of orthopaedic insoles also received a support bandage or orthosis. In addition, 8 per cent of users of insoles also received medical compression stockings. These prescriptions show that medical aids can be combined in a meaningful way to support users in their everyday lives with conservative therapeutic measures that are tailored to the individual patient and their specific condition.

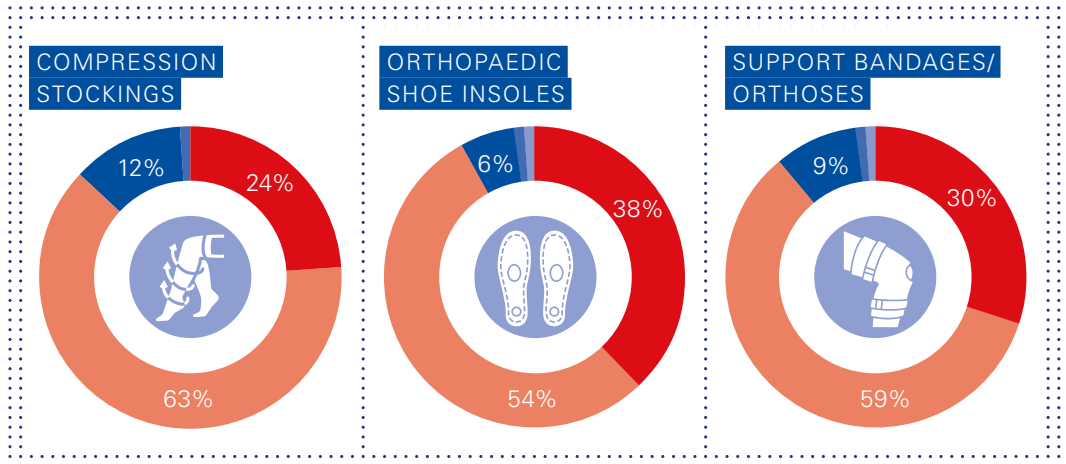
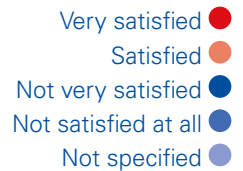
Product recommendations from satisfied users

AROUND 90 PER CENT OF USERS SATISFIED

An important aspect of therapy adherence is user satisfaction with the product concerned. The survey confirms a high level of user satisfaction: nine out of ten orthosis and support bandage wearers are satisfied or very satisfied with their medical aids (89 per cent). Satisfaction is also very high among wearers of medical compression stockings: 87 per cent are satisfied or very satisfied with their medical aids. Users who wear their stockings every day are above average in terms of satisfaction (90 per cent). The vast majority of users of orthopaedic shoe insoles also continue to rate their insoles positively: 92 per cent are (very) satisfied.

HIGH LEVEL OF SATISFACTION

Question: How satisfied are you with your medical aid?



HIGH RECOMMENDATION RATE

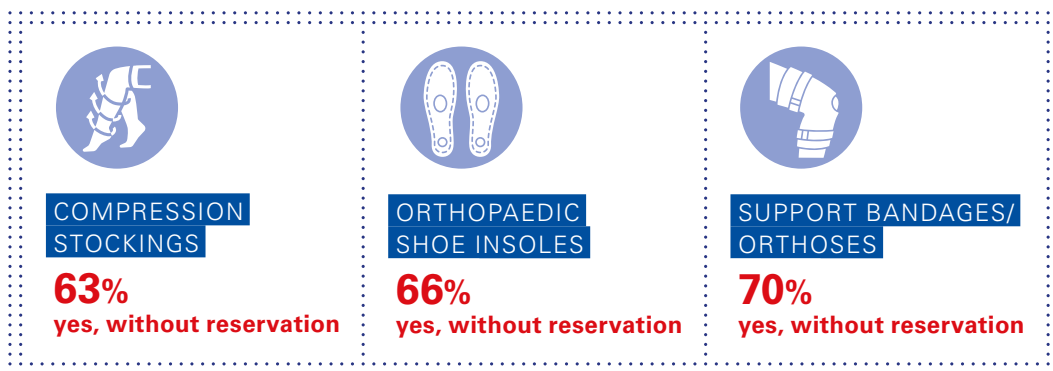
User satisfaction is also reflected in the high recommendation rate: 63 per cent of users of medical compression stockings would recommend them without reservation. That is four percentage points more than in the last survey in 2019 (59 per cent). The recommendation rate for support bandages and orthoses is as high as 70 per cent – an increase of six percentage points compared to 2019 (64 per cent). Finally, 66 per cent of users of orthopaedic shoe insoles would also recommend this aid to others without reservation (64 per cent in 2019).

These high figures, which have risen again since the 2019 survey, confirm that users are convinced of the benefits of the aids and would therefore recommend them to others without reservation.



HIGH RECOMMENDATION RATE

Question: Would you recommend your medical aid without reservation?



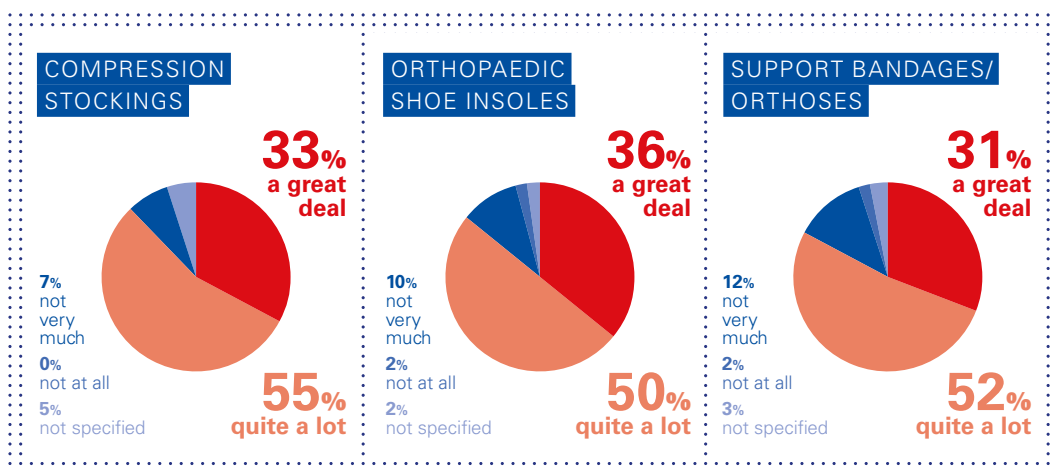
Effective aids for a better quality of life

PROVEN SUBJECTIVELY PERCEIVED BENEFIT

In addition to the high recommendation rate, user satisfaction also correlates strongly with the subjectively perceived benefits of the medical aids: 88 per cent of wearers say that medical compression stockings help them quite a lot or a great deal (2019: 85 per cent). The situation is similar for orthopaedic insoles: overall, 86 per cent of all insole users rate their aid as helpful or very helpful (2019: 84 per cent). When it comes to support bandages and orthoses, 83 per cent of users confirm that these products are helpful or very helpful (2019: 81 per cent). Compared to the 2019 survey, the subjectively perceived benefits of all three product groups have actually increased slightly, which once again highlights the supportive role played by medical aids as tools for everyday life.

HIGH PERCEIVED BENEFIT OF MEDICAL AIDS

Question: How much do your medical compression stockings, orthopaedic insoles or support bandages/orthoses help you?

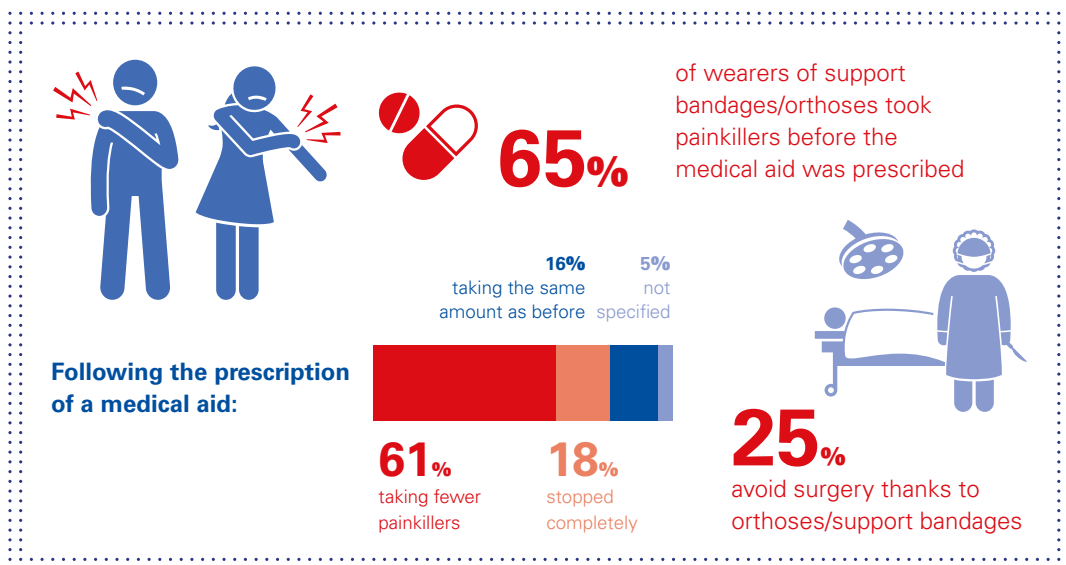


Furthermore, the latest survey reveals a correlation between the intensity of use – measured in terms of frequency of wear (days per week) and duration of wear (hours per day) – and the subjective effect of the aids as perceived by the user: users who wore their medical aid every day for up to 11 hours or more confirmed that the medical aid helped a great deal. This demonstrates that only those who wear their aid and have a positive experience wearing it will be rewarded with optimal therapeutic results.

REDUCTION OF PAIN, PAIN MEDICATION AND OPERATIONS

The majority of survey participants reported that the use of medical aids effectively alleviated their symptoms. In everyday life, pain is particularly stressful for patients and leads to the development of protective posture or limited mobility. The use of support bandages/orthoses can reduce pain according to 61 per cent of respondents, while the use of orthopaedic shoe insoles can reduce pain for as many as 75 per cent. Among users of medical compression stockings, 48 per cent report pain relief.

FEWER PAINKILLERS THANKS TO SUPPORT BANDAGES/ORTHOSES



These survey results emphasise the fact that medical aids help to reduce pain and thus also minimise users' need for painkillers. Before being prescribed their medical aid, 65 per cent of orthosis and support bandage wearers took painkillers. Thanks to functional therapy with support bandages or orthoses, 61 per cent are able to reduce their consumption of painkillers, while 18 per cent are even able to stop taking pain medication altogether.

In addition, 25 per cent of respondents report that surgery was not necessary due to the use of an orthosis or support bandage. A further 13 per cent believed that their operation could be postponed or delayed.

These results underscore the high value of conservative therapy with medical aids. The advantages of these medical aids are their local application and their physical effect compared to systemic, pharmacological therapy with painkillers or invasive procedures with possible side effects and complications.

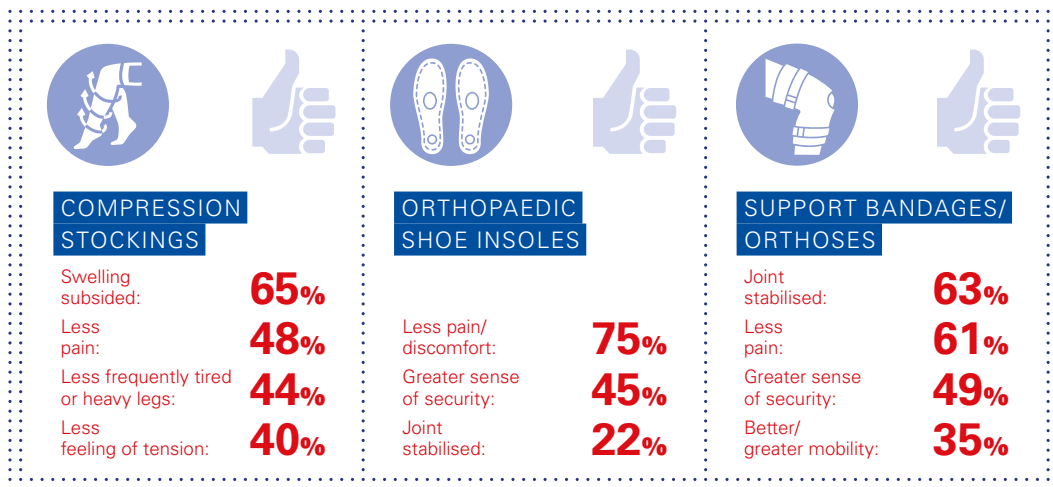
POSITIVE EFFECTS ON THE VENOUS SYSTEM AND THE MUSCULOSKELETAL SYSTEM

Medical compression stockings exert defined pressure on tissue and the underlying venous and lymphatic vessel system through their graduated pressure gradient. Thanks to this mechanism, 65 per cent of respondents report that the use of medical compression stockings has reduced swelling, while 44 per cent are experiencing less frequent tiredness or heaviness in their legs.

When it comes to support bandages and orthoses, joint stabilisation ranks first among the positive effects reported, at 63 per cent. Furthermore, 49 per cent of users of support bandages/orthoses and 45 per cent of users of orthopaedic shoe insoles confirm that the aid gives them a feeling of security.

This relief of symptoms demonstrates that conservative treatment with medical compression stockings and functional therapy with support bandages and orthoses are effective and can provide good support for those affected in their everyday activities.

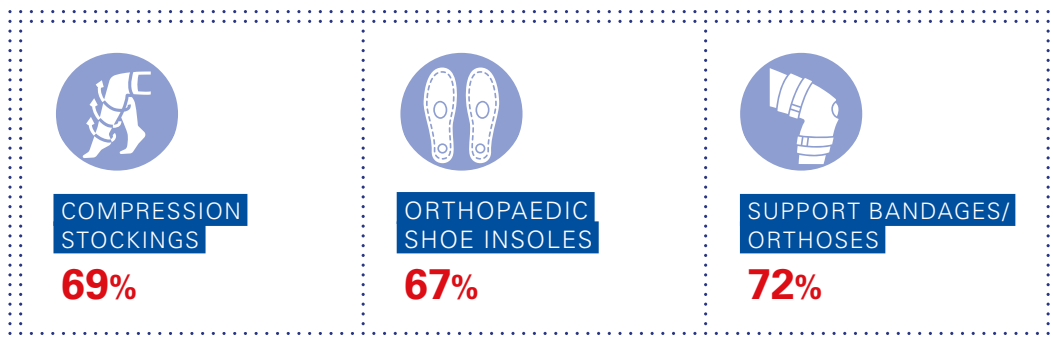
Question: Question for those who benefit from using medical compression stockings, orthopaedic insoles or support bandages/orthoses: In what way did the medical aid help?



SIGNIFICANT IMPROVEMENT IN MOBILITY – INCLUDING AT WORK

Exercise is a crucial part of treatment for many orthopaedic conditions and also for venous disorders. However, musculoskeletal complaints, pain and swelling often lead to limited mobility – a vicious circle. The survey shows that medical aids also enable their users to become more mobile again by alleviating their symptoms. Almost three quarters (72 per cent) of support bandage and orthosis wearers, 69 per cent of compression stocking wearers and 67 per cent of orthopaedic insole wearers confirm improved mobility.

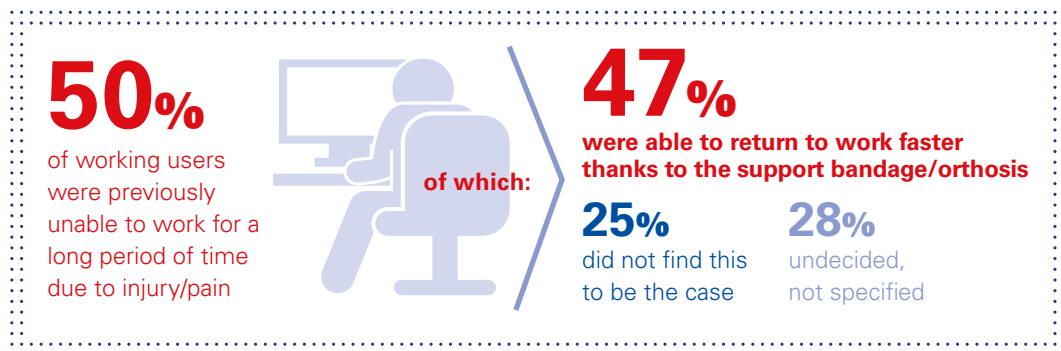
GREATER MOBILITY THANKS TO...



This increased mobility can also speed up their return to work: almost half of those who were unable to work for a long period of time following an injury or illness were able to return to work earlier than expected thanks to a prescribed support bandage or orthosis (47 per cent).

FASTER RETURN TO WORK

Question for working people: Did you feel that the orthosis/support bandage enabled you to return to work sooner than would otherwise have been possible?



NOTICEABLE IMPROVEMENT IN QUALITY OF LIFE

Quality of life (QoL) encompasses physical, psychological and social aspects and is therefore essential to people's health and general well-being. However, symptoms and limitations in everyday activities can severely impair the quality of life of those affected. In addition to user satisfaction and perceived benefits, the patient's perceived quality of life is also crucial for good adherence. The survey confirms that medical aids help users to regain some quality of life. This is confirmed by 80 per cent (2019: 79 per cent) of users of support bandages and orthoses. Eighty per cent (2019: 74 per cent) of people who wear medical compression stockings also report improved quality of life – especially those who wear their stockings every day (84 per cent). Among those who have been prescribed medical compression stockings for over eight years, as many as 90 per cent report a positive impact on their quality of life. Seventy-eight per cent (2019: 74 per cent) of insole wearers also confirm a noticeable improvement in their quality of life.

The higher proportion of respondents reporting a noticeable improvement in their quality of life in the latest survey compared to the 2019 survey shows that users remain convinced of the benefits of the products and that their confidence in medical aids has grown even further – possibly partly due to the challenges and supply bottlenecks during the COVID-19 pandemic, when medical aids played an important role in bridging gaps in therapy and certainly also helped to improve people’s quality of life.

NOTICEABLE IMPROVEMENT IN QUALITY OF LIFE

The majority confirm that the medical aid has helped them regain some quality of life.



COMPRESSION STOCKINGS

80%

2019 survey: 74%



ORTHOPAEDIC SHOE INSOLES

78%

2019 survey: 74%



SUPPORT BANDAGES/ ORTHOSES

80%

2019 survey: 79%

Convincing and comprehensive product quality

HIGH EXPECTATIONS IN TERMS OF COMFORT AND QUALITY

In addition to usage and subjective perceptions of effectiveness, the survey also examined users' expectations regarding the product characteristics and quality of medical aids.

Users want all aids to be very comfortable to wear: 84 per cent of support bandage and orthosis users consider this to be particularly important. Respondents expect medical compression stockings not to cause skin problems (84 per cent) and not to make them sweat (68 per cent), while 96 per cent of users of orthopaedic insoles also rate comfort as particularly important.

In addition, users attach great importance to being able to put on and take off their aid quickly and easily. This is the preference of 84 per cent of those who wear support bandages or orthoses and 83 per cent of those who wear medical compression stockings.

The high-quality workmanship of the support bandage or orthosis is particularly important for 64 per cent. This view is shared by 76 per cent of those who wear medical compression stockings and 80 per cent of those who wear insoles.

USER-FRIENDLY PRODUCT CHARACTERISTICS OF MEDICAL COMPRESSION STOCKINGS

The survey compared users' expectations with their actual ratings. When these two aspects are compared, the results show that expectations of medical aids are also being met across various product characteristics.

Wearers of medical compression stockings particularly appreciate their high-quality workmanship (69 per cent “agree completely”; 25 per cent “agree somewhat”) and skin-friendliness (59 per cent “agree completely”; 33 per cent “agree somewhat”). In addition, over 84 per cent (49 per cent “agree completely”; 35 per cent “agree somewhat”) confirm that their medical compression stockings are easy to put on and take off. For the majority of the product characteristics surveyed, user expectations are actually exceeded – including good workmanship, the appearance of the stockings (e.g. thin material, neutral appearance without any association with illness) and the available colour options.

These aspects indicate that users are very satisfied with the product quality and product portfolio, enabling patient-specific care that supports the best possible treatment outcome thanks to high adherence.

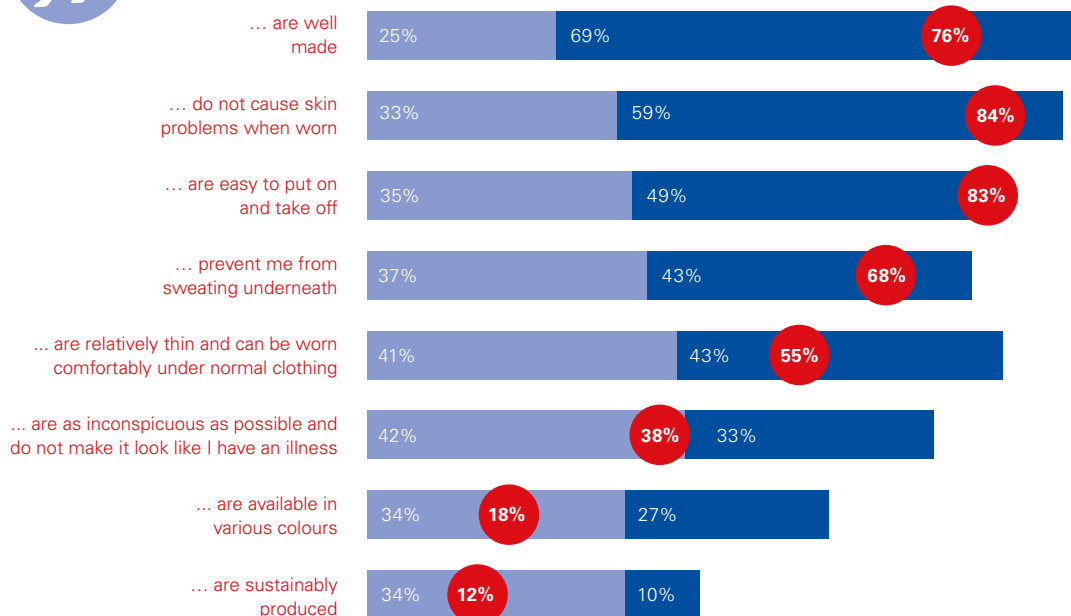
This is particularly important to me ●
 Agree completely ●
 Agree somewhat ●

PRODUCT CHARACTERISTICS



COMPRESSION STOCKINGS

My compression stockings...



HIGH LEVEL OF COMFORT WITH ORTHOPAEDIC INSOLES

Users of orthopaedic insoles particularly appreciate the comfort they provide (76 per cent “agree completely”; 21 per cent “agree somewhat”). Almost all users confirm that their orthopaedic insoles are very well made (75 per cent “agree completely”; 23 per cent “agree somewhat”) and 55 per cent attest to their long durability (39 per cent “agree somewhat”). Even though the use of orthopaedic insoles in different shoes is not always possible for technical reasons, 51 per cent still “agree completely” that this characteristic is fulfilled and 32 per cent “agree somewhat”. Users give a similar rating for good fit: 86 per cent of users (48 per cent “agree completely”; 38 per cent “agree somewhat”) confirm that the insoles are thin and fit well in shoes.

These responses from survey participants confirm user satisfaction and indicate that the product quality meets expectations, thereby enabling a high level of compliance.

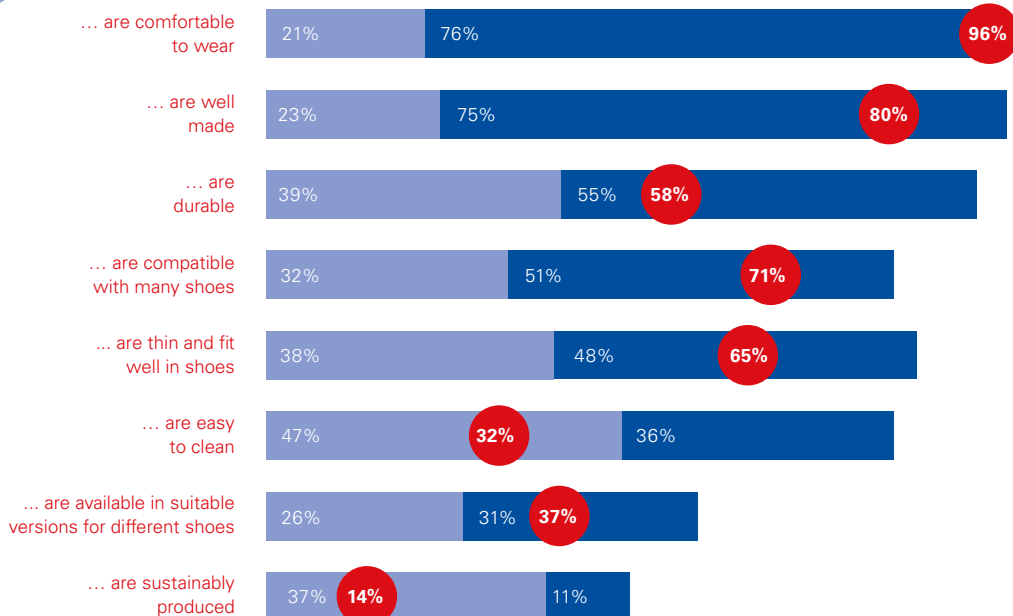
This is particularly important to me ●
 Agree completely ●
 Agree somewhat ●

PRODUCT CHARACTERISTICS



ORTHOPAEDIC SHOE INSOLES

My orthopaedic insoles...



SUPPORT BANDAGES AND ORTHOSES AS “SAFETY BELTS”

A comparison of the assessment of the support bandages and orthoses used with users’ wishes and requirements shows that these orthopaedic aids also meet expectations. Ninety-six per cent of support bandage and orthosis wearers confirm that their support bandage or orthosis gives them a feeling of security (79 per cent “agree completely”; 17 per cent “agree somewhat”). At 97 per cent, almost all users praise how easy they are to put on and take off (75 per cent “agree completely”; another 22 per cent “agree somewhat”). In addition, 61 per cent confirm without reservation that the workmanship is good, and a further 35 per cent “agree somewhat” that it is good. Sixty-one per cent confirm without reservation that the workmanship is good, and a further 35 per cent “agree somewhat” that it is good. Sixty-one per cent of respondents “agree completely” that the support bandage or orthosis is comfortable to wear, while a further 32 per cent “agree somewhat”.

These survey results confirm the high value of functional therapy with support bandages and orthoses as a conservative treatment measure. Above all, its function as a “safety belt” after an acute injury, in cases of chronic complaints or even post-operatively is of great importance to users. Users also appreciate the handling, workmanship and comfort.

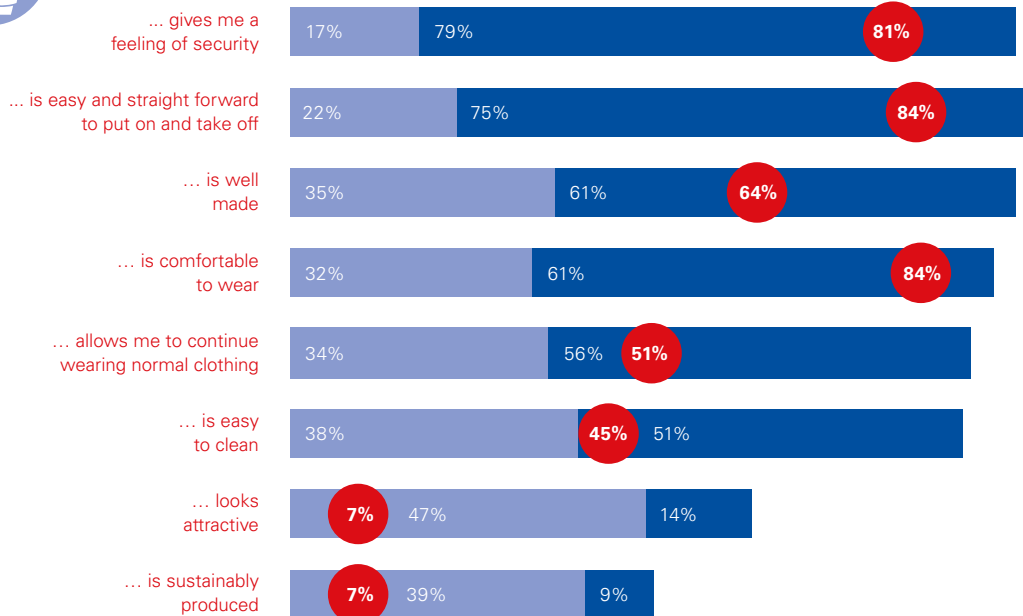
This is particularly important to me ●
 Agree completely ●
 Agree somewhat ●

PRODUCT CHARACTERISTICS



SUPPORT BANDAGES/ ORTHOSES

My orthosis or support bandage...



INDEPENDENT INVESTMENT FOR THE BEST POSSIBLE CARE

The results of the product characteristics assessment show that product quality is a top priority for users of medical compression stockings, orthopaedic insoles and support bandages/orthoses. Only good workmanship and a high level of comfort, combined with quick and easy application in everyday life, will convince users of the value of these medical aids, encouraging them to wear them regularly. Ultimately, high adherence is crucial for therapy to be successful. To achieve this therapeutic success, users also take personal responsibility and, due to the high product quality, are willing to bear additional costs that exceed the statutory co-payment.

Of those respondents who opted for medical compression stockings at an additional cost on top of the prescription fee, seven out of ten (67 per cent) consider the price-performance ratio to be reasonable, while 74 per cent of users of support bandages and orthoses who paid a surcharge of more than €10 also state that the higher price is justified. The picture is almost identical for users of orthopaedic insoles: 71 per cent with a product above the basic care level find the price-performance ratio reasonable.

These results show that users are also investing in their own health in order to obtain the best possible products tailored to their individual needs.

Patient education and follow-up examinations as crucial medical services

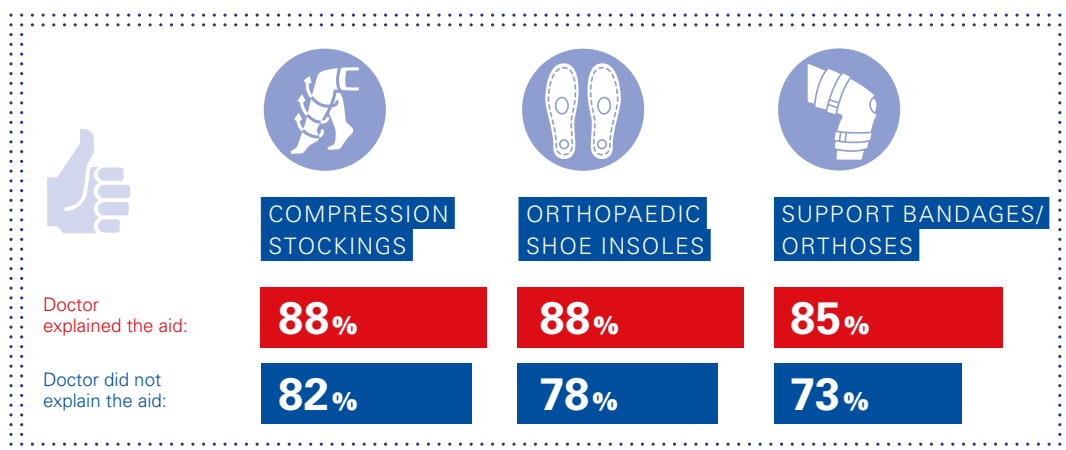
BETTER RESULTS WITH INFORMED PATIENTS

The survey shows how important patient education is for successful treatment. Most doctors inform their patients about how the medical aid works during a consultation: this is reported by 84 per cent of wearers of medical compression stockings (2019: 82 per cent), 77 per cent of insole users (2019: 73 per cent) and 83 per cent of respondents who were prescribed a support bandage or orthosis (2019: 79 per cent). It is encouraging to see that the proportion of users who had a consultation with their doctor has increased in all three groups since the last survey.

When distinguishing between users who have had a consultation and those who have not, 88 per cent of patients whose doctor has explained how to use medical compression stockings and what benefits they offer say that the stockings help them quite a lot or a great deal. Only 82 per cent of patients who were not informed in advance by their doctor state this. There is also a difference among insole wearers: 88 per cent of users who have had a consultation with their doctor attest to the effectiveness of the aid. Only 78 per cent of uninformed users say this. The difference is particularly apparent among support bandage and orthosis wearers, at 12 percentage points: 85 per cent of medically informed patients say that their medical aids help them quite a lot or a great deal, compared with only 73 per cent of uninformed patients.

EDUCATION HAS A POSITIVE EFFECT

From the patients' point of view, aids help quite a lot or a great deal.



These survey results indicate that patient education is a basic prerequisite for subjectively perceived benefits and thus for successful treatment. Patients need to understand how to use the products, how they work and what their benefits are to be able to use them correctly and consistently.

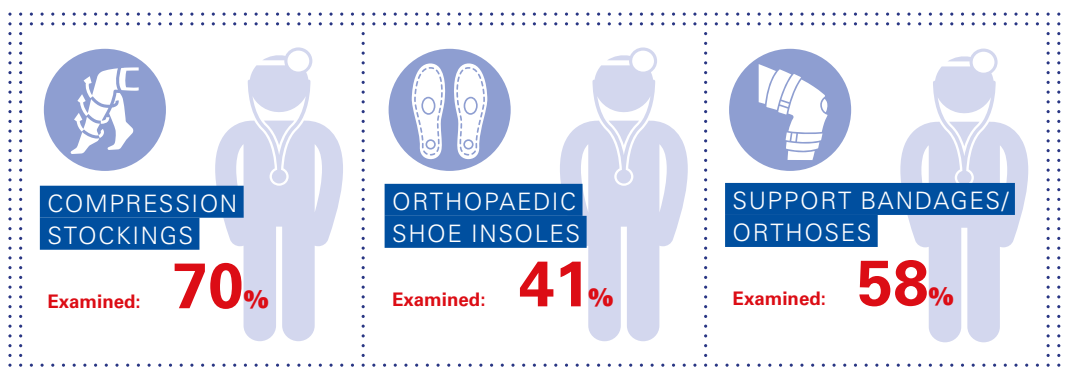
INCREASE IN FOLLOW-UP EXAMINATIONS AFTER PRESCRIPTION OF MEDICAL COMPRESSION STOCKINGS

Not only is it crucial to inform the patient before prescribing, but it is also advisable to carry out a check-up during a follow-up appointment after prescribing the aid to ensure that the patient has received the right product and that it fits correctly. This check was carried out on 70 per cent of wearers of medical compression stockings. This represents an increase of nine percentage points compared to 2019 (61 per cent). Fifty-eight per cent of users of orthoses or support bandages report having a second appointment (2019: 56 per cent). When it comes to orthopaedic insoles, only four out of ten users (41 per cent) say that their doctor examined their orthopaedic insoles again (2019: 40 per cent).

The low figures for orthopaedic insoles and support bandages/orthoses, in particular, indicate that an increase in doctors assessing the provided medical aids at a follow-up appointment would be desirable, especially as a detailed analysis of the survey shows that a subsequent medical check-up can have a positive influence on the patient's subjective perception of the benefits of the aids and on their mobility.

FOLLOW-UP APPOINTMENT

Question: Did the doctor examine your medical aid at a follow-up appointment?



SPARE AIDS AND FOLLOW-UP PRESCRIPTIONS CRUCIAL FOR HIGH ADHERENCE

Medical compression stockings enjoy a high level of popularity and acceptance among respondents, with 59 per cent stating that they wear the stockings every day. A further 22 per cent use them five or six days a week. The average daily wearing time is ten hours. For many patients, having a second pair of compression stockings is therefore important so they can alternate them for regular use: 70 per cent consider this to be “particularly important”, while 22 per cent consider it to be “quite important”. Those who wear their medical compression stockings every day understandably place particular importance on having a second pair of stockings: of these patients who comply with their treatment, 82 per cent consider a second pair of compression stockings to be particularly important for changing them; but even among those who do not wear their stockings every day, 55 per cent agree with this statement.

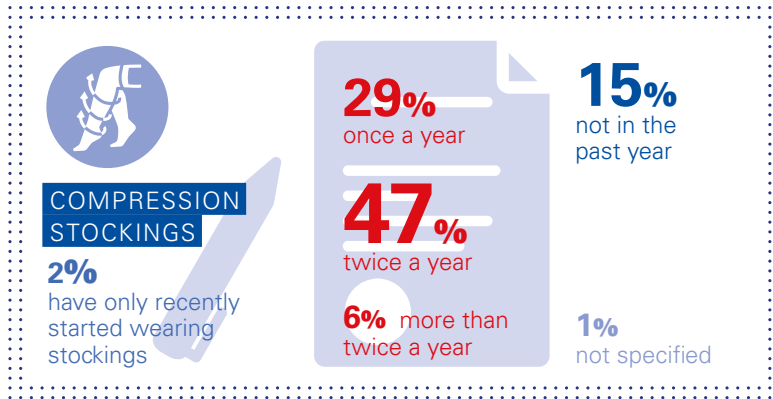
The vast majority of patients with orthopaedic shoe insoles also wear them almost every day. Currently, 84 per cent of all users report that they use their insoles daily or almost daily. A second pair of insoles is of particular value to users who wear their insoles for eleven hours or more every day: 64 per cent state that having a second pair is particularly important to them.

In addition to alternating use, a regular supply via follow-up prescriptions is also important for ensuring the medical effectiveness of the aids and for adherence – especially in the case of chronic conditions requiring long-term therapy. To ensure consistent, daily use, it is crucial that patients have more than one pair of medical compression stockings – among other things, because medical compression stockings must be washed daily for optimal effectiveness. The frequency of prescription is therefore important. Twenty-nine per cent of respondents say that they have been prescribed new medical compression stockings once in the past twelve months, 47 per cent twice and 6 per cent more than twice. Only 15 per cent have not been prescribed any further stockings in the past twelve months.

Orthopaedic shoe insoles are also prescribed regularly: 36 per cent of respondents report that they are usually prescribed new orthopaedic insoles by their doctor once a year, while 21 per cent are prescribed them more than once a year. Sixteen per cent say they only get a new prescription every two years, while 17 per cent get one every three years or less frequently.

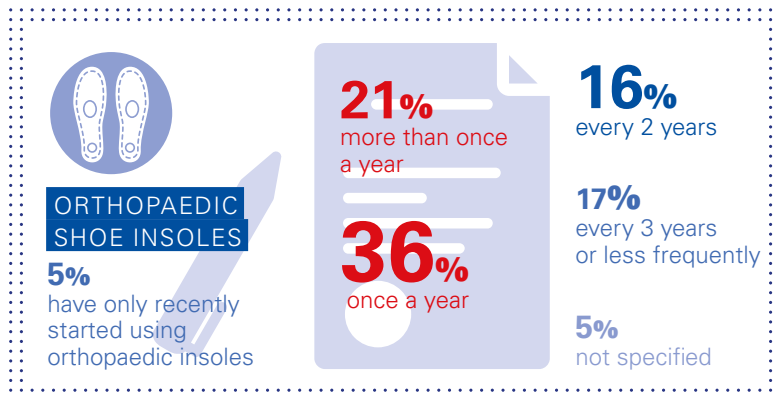
FREQUENCY OF PRESCRIPTION FOR MEDICAL COMPRESSION STOCKINGS

Question: How often do you usually get new stockings on prescription?



FREQUENCY OF PRESCRIPTION FOR ORTHOPAEDIC INSOLES

Question: How often do you usually get new insoles on prescription?



These results confirm that, for both medical and hygienic reasons and in cases where aids are subject to particularly heavy use, having a second aid is advisable and is also considered important by users for ensuring maximum adherence. The same applies to receiving a consistent follow-up prescription after the initial prescription if long-term or maintenance therapy is indicated for medical reasons, for example in the case of chronic venous insufficiency and lymphoedema or chronic orthopaedic complaints due to degenerative processes or misalignments.

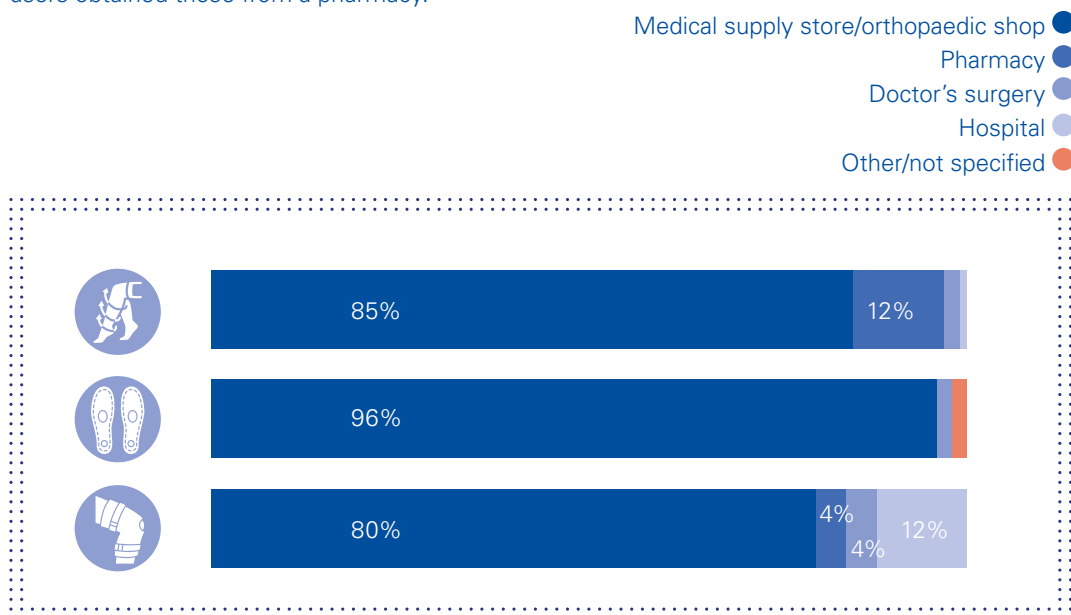
Advice and follow-up appointments as the cornerstone of care in specialist shops

MEDICAL SUPPLY STORES AND SPECIALIST SHOPS AS THE MOST IMPORTANT SOURCES OF SUPPLY

The first port of call for purchasing medical aids remains medical supply stores or specialist orthopaedic or orthopaedic footwear shops. This is confirmed by 85 per cent of wearers of medical compression stockings, 96 per cent of insole users and 80 per cent of support bandage and orthosis wearers.

Support bandages or orthoses were received from a hospital in 12 per cent of cases, while this figure is 1 per cent for medical compression stockings. It should be noted that the survey did not include stockings worn by patients during an inpatient hospital stay (e.g. medical anti-embolism compression stockings).

Doctors' surgeries and pharmacies play a minor role as sources of orthopaedic insoles, support bandages and orthoses. Only medical compression stockings present a slightly different picture: 12 per cent of users obtained these from a pharmacy.



DESIRE FOR PERSONAL ON-SITE ADVICE REGARDING THE PROVISION OF MEDICAL AIDS

In addition to comprehensive patient education provided by their doctor, patients also have a strong desire for advice from the medical supply store or specialist shop before purchasing medical aids. For example, 85 per cent of users of medical compression stockings say that this aspect is “very important” (48 per cent) or “important” (37 per cent) to them. Similar information is provided by wearers of orthopaedic insoles: for 34 per cent, advice is “very important”, while for a further 43 per cent it is still “important”. Users of support bandages and orthoses show the greatest desire for advice. Here, the figure is as high as 88 per cent (“very important” for 42 per cent and “important” for 46 per cent).

Patients provide interesting information about the nature of the advice they want: the vast majority would prefer a personal consultation on site. This is confirmed by 89 per cent of medical compression stocking users, 85 per cent of insole users and 81 per cent of support bandage and orthosis wearers. Only 7 to 12 per cent could also envisage having an online consultation.

These clear results show that users of medical aids see medical supply stores or specialist shops as playing a crucial advisory role. Important aspects of customer advice before purchasing a product include how to handle it and information on its effectiveness and appearance. Since these are primarily practical aspects, the vast majority of patients would prefer a personal consultation on site, which, compared to an online consultation, also guarantees the opportunity to make a tactile and visual assessment of product quality and provides scope for more open communication. This personalised advice may also help to reinforce customer loyalty and maintain it over a longer term.



DESIRE FOR PERSONAL CONSULTATION ON SITE

Question: Is it important to you that the consultation takes place in person on site?



COMPRESSION STOCKINGS

89% yes



ORTHOPAEDIC SHOE INSOLES

85% yes



SUPPORT BANDAGES/ ORTHOSES

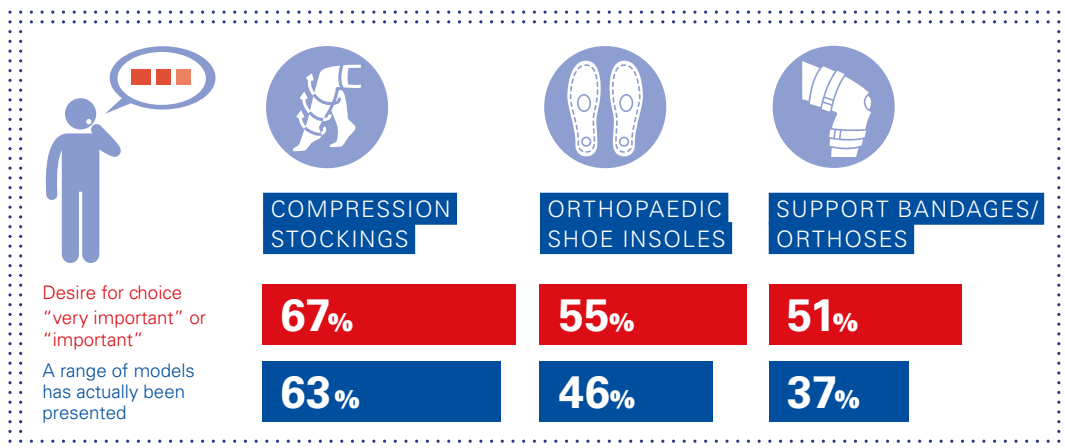
81% yes

PRODUCT SELECTION OPTIONS CONSIDERED VERY IMPORTANT

In addition to general on-site advice prior to purchasing medical aids, respondents consider it particularly important that they are presented with a range of models to choose from: 67 per cent of users of medical compression stockings consider this to be “very important” or “important”. In the case of orthopaedic insoles, 55 per cent of respondents agree. Among those who wear support bandages and orthoses, one in two (51 per cent) still consider freedom of choice in products to be “very important” or “important”. A discrepancy becomes apparent when this patient preference is compared with the situation in reality. For example, 63 per cent of medical compression stocking users, 46 per cent of insole users and only 37 per cent of support bandage and orthosis wearers report that they were shown different models to choose from.

DISCREPANCY BETWEEN PREFERENCE AND REALITY IN TERMS OF FREEDOM OF CHOICE

The majority of respondents would like to see a selection of different models on display. This has not always been the case in reality.



This discrepancy between preference and reality shows that the presentation of different models in specialist shops should be further expanded to meet the demand from customers and patients for freedom of choice and thus ensure maximum adherence and therapeutic success – especially since the majority of respondents are also willing to invest in a higher-quality model with additional costs beyond the statutory co-payment or in the best possible model with even higher additional costs. Forty-three per cent of medical compression stocking users, 34 per cent of support bandage and orthosis users and 40 per cent of insole users prefer a higher-quality model at an additional cost. An additional 23 per cent of users of medical compression stockings, 30 per cent of support bandage and orthosis users and 27 per cent of insole users would invest in the best possible model with even higher additional costs.

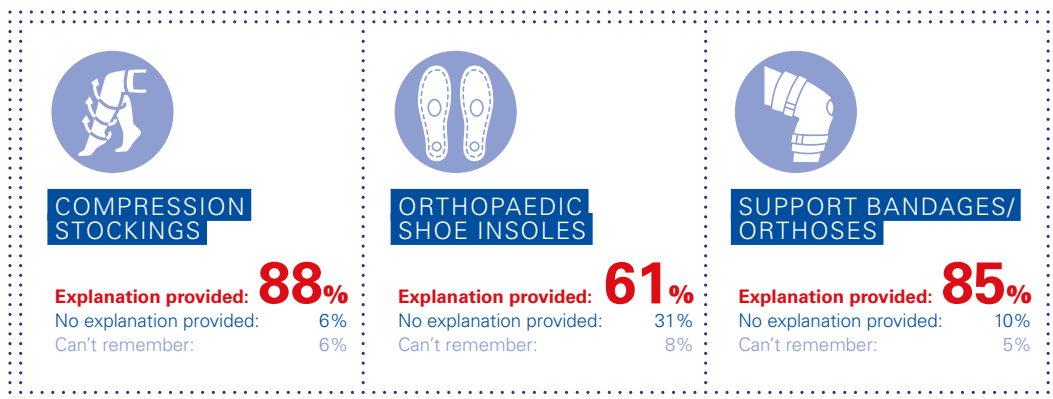
PRODUCT ADVICE AS A STANDARD SERVICE

Advice and instruction on how to use the product are crucial factors for good adherence, both before and while purchasing medical aids. Users can only wear a product correctly and regularly if they know how to use it, how to clean it and how it works.

As in the 2019 survey, most users of medical compression stockings report that practical aspects – such as putting on, wearing or cleaning their medical aid – were explained to them. The proportion of informed patients is 88 per cent. Only 6 per cent say they did not receive any information or explanation (2019: 11 per cent). This shows a positive trend in the provision of advice over recent years (2014: 80 per cent, 2019: 85 per cent, 2023: 88 per cent).



EXPLANATION OF HANDLING



Of those receiving support bandages or orthoses, 85 per cent received detailed instructions on how to properly use, put on and clean the product. Only 10 per cent did not receive this advice. When it comes to the provision of support bandages and orthoses, it is therefore also clear that the proportion of patients given information has seen an encouraging rise since the last survey (2019: 81 per cent).

Compared to other medical aids, users of orthopaedic shoe insoles are given instructions on how to use their aid much less frequently. Only 61 per cent say that they were informed about wearing or cleaning orthopaedic insoles. However, 31 per cent did not receive any advice. Nevertheless, the trend here is also positive compared to the last survey, as only 55 per cent were instructed on how to handle the product in the 2019 survey.

These survey results confirm that the majority of patients are instructed on how to use the products. Specialist shops thus play a significant part in ensuring patients' compliance by providing comprehensive advice.

INCREASINGLY DIGITAL MEASUREMENTS

Before selecting and providing a product, measurements usually need to be taken so that the final product is individually tailored to the patient and their requirements and needs. Accurate measurement is the key to ensuring a good fit and thus a high degree of user acceptance. The survey results confirm that the majority of specialist shops offer customers measurements in addition to explaining how to use and handle the medical aid.

Before selecting and receiving the final product, 91 per cent of medical compression stocking wearers were measured – 72 per cent with a tape measure and 19 per cent with an electronic or digital system. Only 5 per cent say they were not measured last time. A trend can be observed, particularly in digital measurements: compared to the previous surveys in 2014 and 2019, the proportion of digital measurements has risen steadily (2014: 11 per cent, 2019: 14 per cent, 2023: 19 per cent). The further increase in the latest survey may also have been influenced by the COVID-19 pandemic, as patients and staff in specialist shops may have preferred virtually contactless measuring techniques during this period.

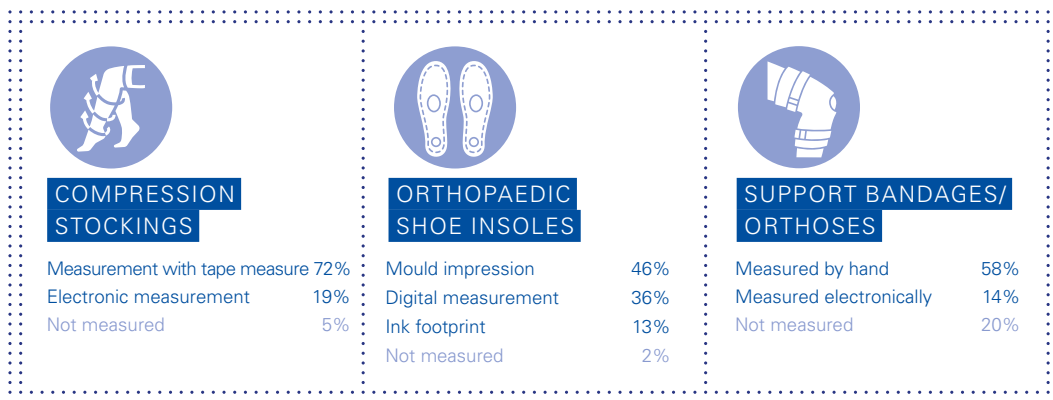
Almost half of insole users (46 per cent) were measured using a mould impression, 36 per cent were measured digitally, 13 per cent using an ink footprint, and 1 per cent using another method. Only 2 per cent were not measured. Digital systems have thus also gained ground when it comes to taking measurements for orthopaedic insoles (2019: 28 per cent, 2023: 36 per cent).

Measurements are also part of patient-specific care involving a support bandage or orthosis: 72 per cent of users report that they have had measurements taken. In 58 per cent of cases, this was done manually, and in 14 per cent of cases electronically or digitally. However, 20 per cent of respondents state that they were not measured. If we divide the respondents into users who obtained their support bandage or orthosis from a medical supply store or orthopaedic shop and those who obtained one from another source, we see significant differences in measurement performance: 77 per cent of respondents who purchased their aid from a medical supply store were measured, whereas only 52 per cent of respondents who purchased their aid from another source were measured.

This information confirms that specialist shops offer and perform measurements as an established service in order to provide patient-specific and needs-based care. The survey also shows that digital systems are playing an increasingly important role in the field of medical aids, as they are in the healthcare sector as a whole.

SERVICE FOR MEDICAL AIDS

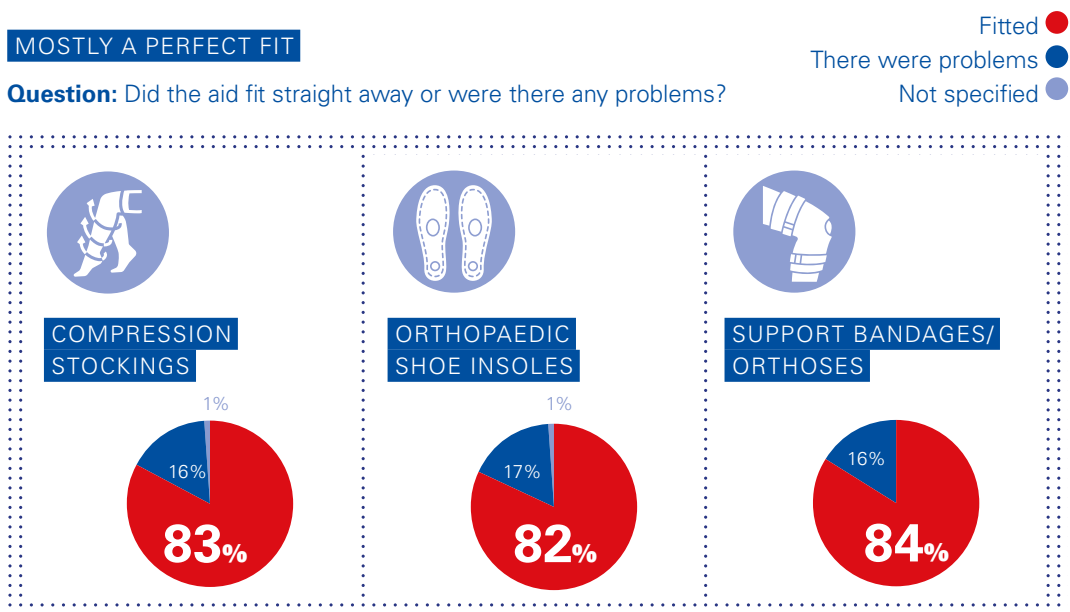
Question: Was the relevant body part measured before you received the medical aid?



PROVIDED AIDS FIT VERY WELL

Precise, individual measurements are crucial for a good fit. When survey participants were asked whether their medical aids fitted properly straight away after being provided, 83 per cent of medical compression stocking wearers, 84 per cent of support bandages/orthosis users and 82 per cent of orthopaedic insole users confirmed that this was the case. Sixteen per cent of users of support bandages and orthoses experienced minor problems with the fit. Similar figures were recorded for compression stockings (16 per cent) and orthopaedic insoles (17 per cent).

These survey results confirm that the combination of personal on-site advice on the products, precise measurements and further advice after the products have been provided pays off and rewards users with a high fit rate.



Brief profile of eurocom

eurocom is the European federation of manufacturers of compression therapy and orthopaedic devices. We represent products that, given demographic trends, everyone is likely to need at least once in their life. With decades of expertise and our commitment to continuous development, we see ourselves as influential players and dialogue partners in the healthcare market. We are committed to spreading knowledge about the medical benefits, effectiveness and cost-effectiveness of compression therapy and orthopaedic devices. This is because the provision of medical aids based on individual needs helps to treat and prevent numerous common diseases.

eurocom stands for effective products that are tailored to people and their needs and enhance their mobility and quality of life. These products compensate for limitations and enable social participation. Appropriate therapy can reduce treatment and follow-up costs. With this in mind, eurocom develops concepts for ensuring the provision of medical aids both now and in the future. We plan to do this through action including:

- advocating for quality standards in the medical aids market
- strengthening patients' right to appropriate treatment
- expanding the provision of optimal medical aids to patients



We enhance health
so that people can be
mobile again.

We see pooling expertise as a key part of this. We provide relevant, well-prepared information on the latest developments in the field of compression therapy and orthopaedic devices to those who make decisions about patient care. As an association, we also facilitate knowledge transfer, initiate discussions and collaborations, and create transparency within the industry. eurocom's activities are aimed at health insurance companies, doctors and umbrella organisations, political decision-makers, specialist retailers and patients.

With its 37 current members, eurocom comprises almost all companies operating in the German market in the fields of compression therapy and orthopaedic devices.

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Survey design

The survey questioned individuals aged 16 and over who currently use one of the following medical aids prescribed by a doctor: support bandages/orthoses, orthopaedic shoe insoles or medical compression stockings. A two-stage survey was conducted: in the first stage, a representative population survey (omnibus survey) was conducted to determine the structural data of users of the above-mentioned aids, including, frequency of use in particular. For the survey, respondents were given a picture sheet on which the aids were described in detail and illustrated with two photos each.

In the second stage, a total of 1,274 users of the three categories of medical aids were surveyed:

- 424 users of support bandages/orthoses
- 425 users of orthopaedic shoe insoles
- 425 users of medical compression stockings

Interviews were conducted face to face, usually at the respondents' homes. The composition of the respondents corresponded in structure (i.e. regional distribution, gender and age) to the specifications obtained on the basis of the representative population survey. The results are therefore based on a representative cross-section of users aged 16 and over who use the respective aid. This means, for example, that a disproportionate number of women and older people were surveyed among users of compression stockings compared to the average population.

The interviews for the patient survey were carried out in two stages between 2 December 2022 and 26 February 2023.

Unless otherwise stated, the percentages quoted in the brochure refer to the respective users of the aid in question.

The questionnaires were designed according to recognised methodological principles. For reasons of space, the questions have been abbreviated in this summary.

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