

Results

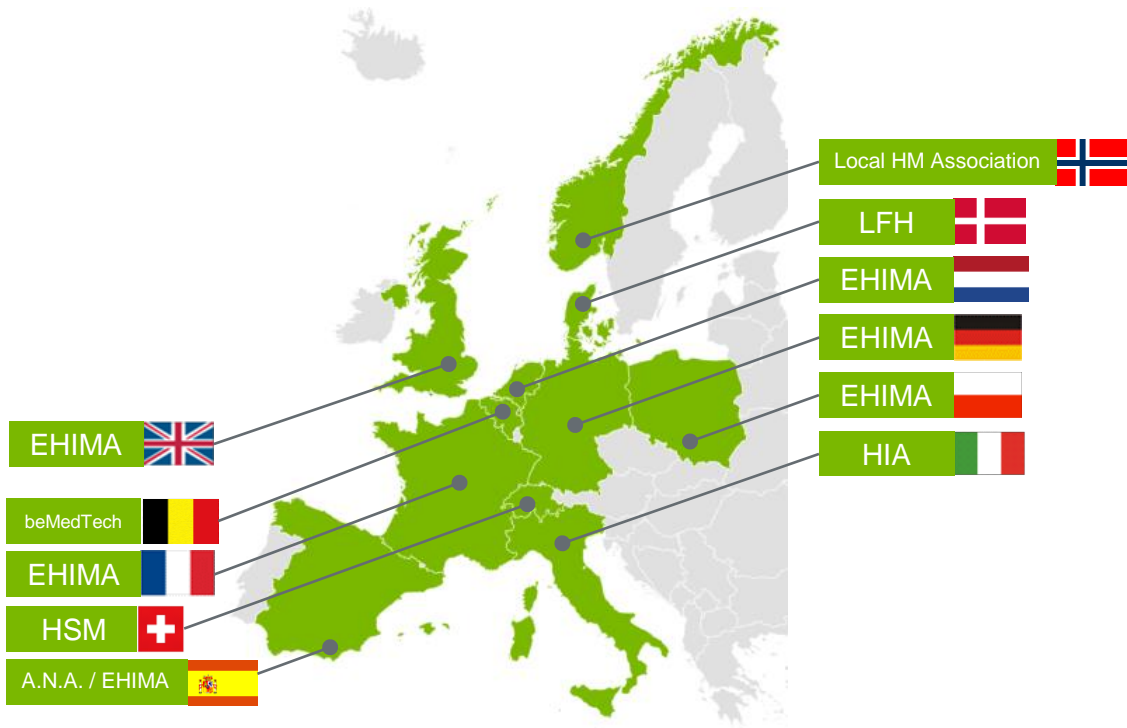
EuroTrak SUI 2022

1. Introduction
2. Market overview
3. Analysis of hearing aid owners
4. Analysis of hearing impaired non-owners
5. Appendix

Summary

1. Introduction

EuroTrak SUI 2022 is part of the EuroTrak / APACTrak studies:



EuroTrak SUI 2022 was designed and executed by Anovum (Zurich) on behalf of HSM / EHIMA

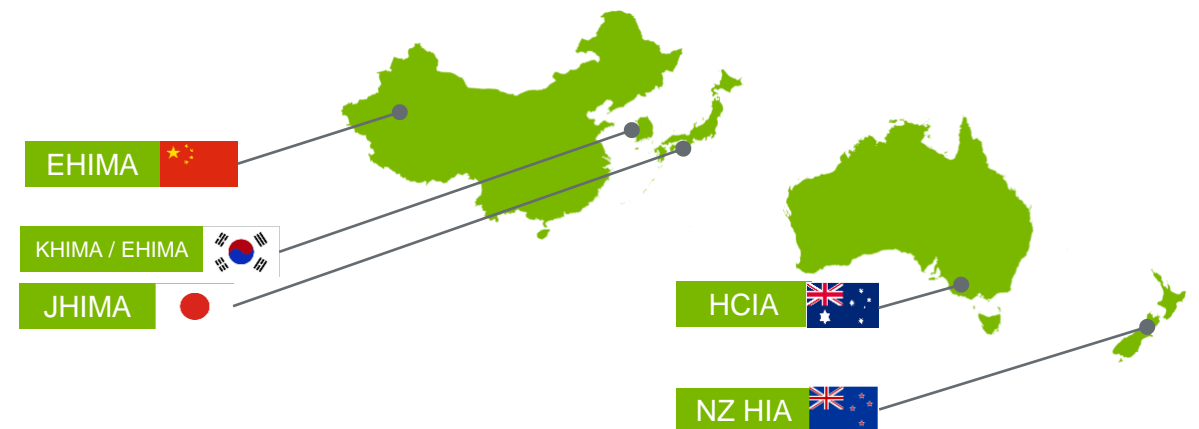
Sample sizes:

Representative sample (sample 1): n=14'735 people

Hearing impaired (sample 2): n=1'324 people

HA owners: n= 799 people

Hearing impaired non-owners: n= 525 people



Summary

2. Market overview

- **Stated hearing loss prevalence**
 - Total: 7.4%, 18+: 8.9% (2018: 7.7 18+: 9.1%).
 - Hearing Tests: Hearing Tests: 30% had a hearing test in the last 5 years (2018: 34%), and family doctors do most tests.
- **Hearing aid adoption rate (HA penetration)**
 - 46.0% of those with self-declared HL (2018: 43.7%).
 - 3.4% of total population (2018: 3.3%).
 - 84% of HA owners have binaural treatment (2018: 81%).
- **The route to the hearing aid**
 - 80% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
 - 54% got hearing aids recommended from the ENT or family doctor (drop out rate=32% / 2018: 34%).
 - 63% of the GP consultations referred to an ENT, 23% to an HA dispenser / Audiologist, and 11% to get hearing aids. 16% recommended no action.
 - 46% of ENT consultations were referred to an Audiologist, 30% recommended getting a hearing aid, and 32% recommended no action.
- **Potential social cost-savings due to the use of hearing aids**
 - Hearing aids are believed to have a positive impact on the job.
 - Hearing aid owners have a lower risk of being depressed.
 - Quality of sleep seems to improve if the hearing impaired use hearing aids.
 - Hearing aid owners are less exhausted in the evening.

Summary

3. Analysis of hearing aid owners

- **Hearing aid ownership, usage, and accessories**

- 83% of all HA owners received some 3rd party reimbursement.
- 59% of owned HAs were bought in 2019 or later.
- The average age of the currently owned HAs is 4.1 years.
- The median age of hearing aids before replacement is 6 years.
- On average, HAs are worn 10 hours a day.
- RIC is the most often purchased type of HA.
- Cochlear Implants: 41% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
- 41% of HA owners use a hearing aids app, and 81% are satisfied with it.
- 15% of the HAs are (to the knowledge of the owners) equipped with Telecoil. The primary usage of Telecoil is with phones, churches, and theaters.

- **Importance of listening situations and satisfaction with HAs**

- 78% of the hearing aid owners say their hearing aid works better than or as expected
- 86% of the HA owners are satisfied with their HAs (2018: 80%).
- The more hours wore per day, the higher the satisfaction with the HA.
- Satisfaction with newer hearing aids is higher than with older hearing aids.
- Talking at home, in small groups, and on the phone are the most critical listening situations.

- **Positive impact of HAs**

- Significant positive impact of HAs on different aspects: Especially the ability to communicate, participate in group activities, social life, and sense of safety improved
- 98% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
- 58% of the hearing aid owners feel more confident moving in a city since wearing hearing aids.

Summary

4. Analysis of hearing impaired non-owners

- **Reasons not to own/use HAs**

- 58% of the hearing impaired without hearing aids think that a third party would pay for any part of hearing aids.
- The main reasons for not using hearing aids are that people think to hear enough, ENT's opinion, or argue they can't afford it.
- 5% who own hearing aids don't use them at all (0 hours); 10% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**

- 85% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid.
- The most important influencing factors for getting hearing aids are worsening hearing loss, ENT, Spouse, and HA dispensers (+price / insurance coverage for the non owners).

Detailed Results: Roadmap

1. Introduction

- Organisation of EuroTrak SUI 2022
- Recruitment process: In search of hearing impaired people

2. Market overview

- Prevalence of hearing loss and hearing aid adoption rate
- Hearing tests and where hearing is tested
- The route to the hearing aid: Sources of information and drop-out rates
- Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities

3. Analysis of hearing aid owners

- Hearing aid ownership, awareness of hearing loss, lifetime of hearing aids and usage
- Reasons for getting hearing aids sooner
- Channels for getting hearing aids, recommendation of channel (NPS)
- Awareness and usage of hearing aid apps, Telecoil
- Satisfaction with hearing aids and drivers
- Importance of listening situations
- Positive impact of hearing aids, safety due to hearing aids, quality of life

4. Analysis of hearing impaired non-owners

- Reasons for not having hearing aids
- Social rejection because of hearing loss compared to the acceptance of hearing aids
- Most important triggers to buy

5. Appendix

- Demographics: Hearing instrument adoption rates and populations

1. Introduction

Organisation of EuroTrak SUI 2022

Organisation

- Principal of the project EuroTrak SUI 2022 is Hearing Systems Manufacturers HSM.
- Anovum Zurich developed the concept of EuroTrak SUI, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore, Anovum analyzed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire

Use of the data

- HSM may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.
- The raw dataset remains at Anovum. If the principal uses the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
“Source: Anovum – EuroTrak SUI/2022/n=[relevant sample size]”
- Member companies of the principal can ask Anovum to further analyse the raw data in specific ways at their own expense.

Recruitment process: In search of hearing impaired people

Step 1: Screening interviews

Objective: Prevalence of hearing loss and hearing aid ownership

Process:

1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)
2. Contacts from large panellist pools
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=14'735** people based on census data.

Step 2: Target population interviews

Objective: Details about satisfaction with hearing aids and reasons for non-adoption

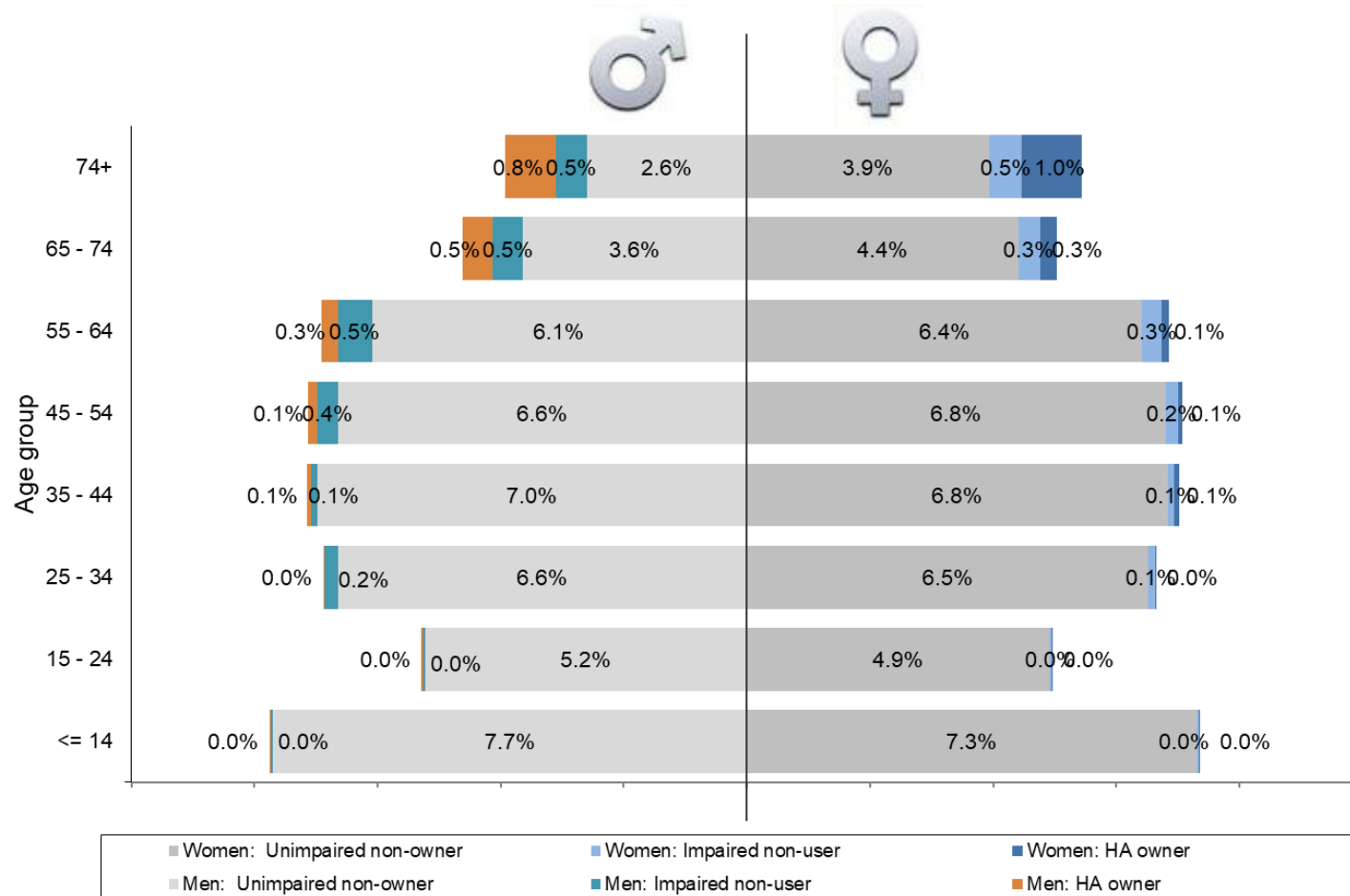
Process:

1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: **n=799** hearing aid owners and **n=525** hearing impaired non-owners

2. Market overview

Prevalence of hearing loss and adoption rate

Hearing loss and hearing instrument ownership by gender/age

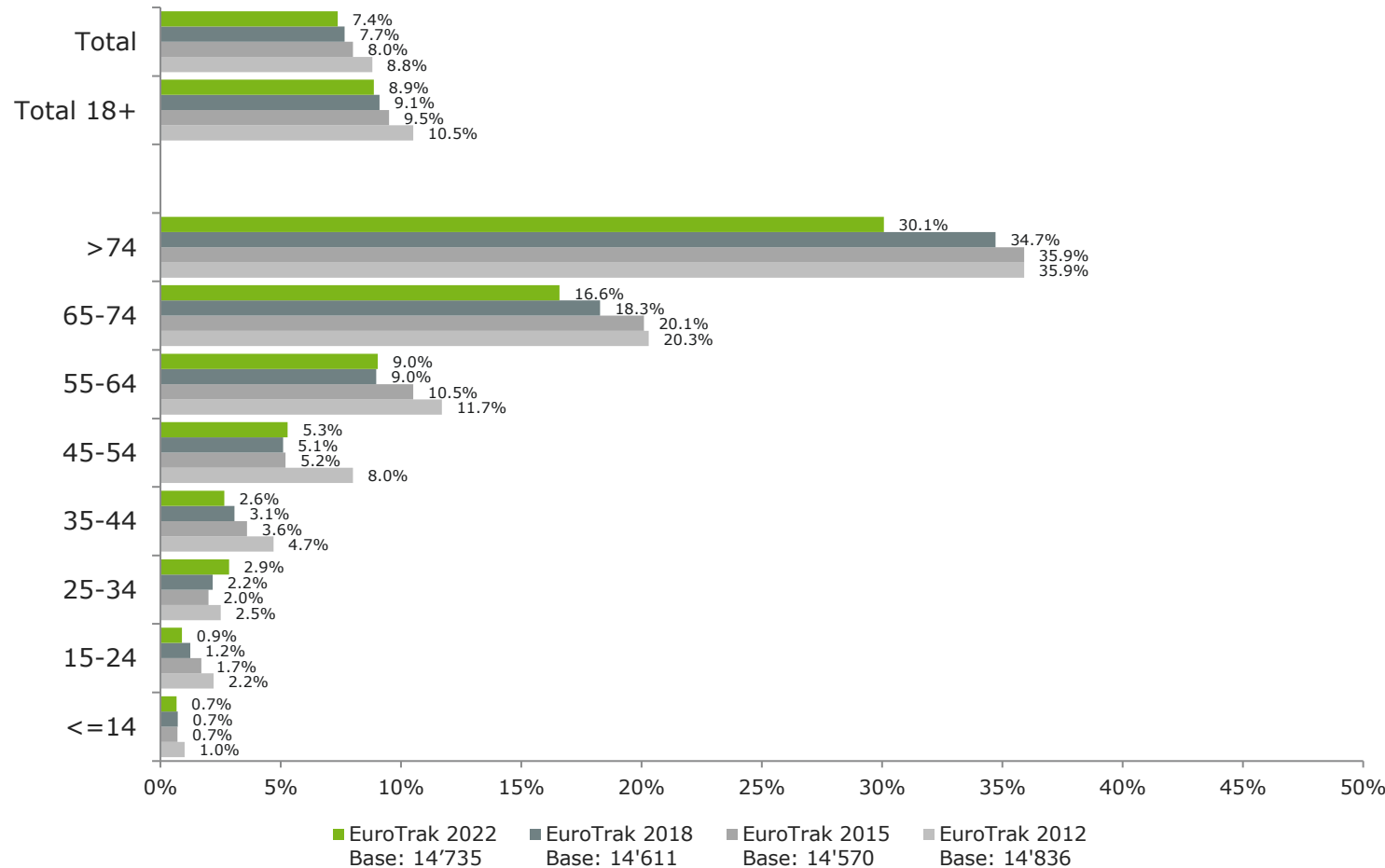


n=14'735

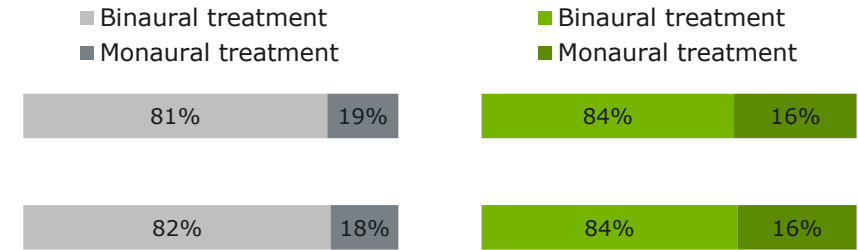
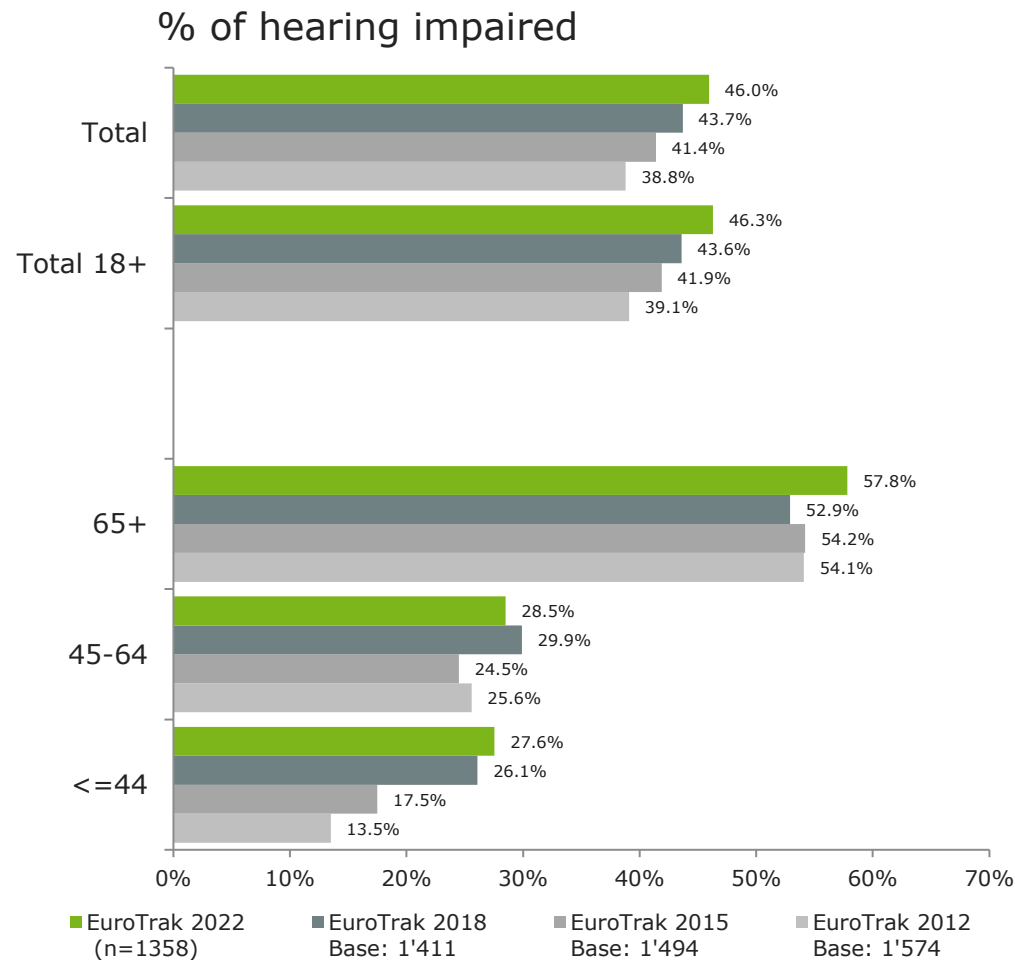
Hearing loss prevalence SUI

Self declared hearing loss

% hearing loss prevalence



Hearing aid adoption rate: 46% of the hearing impaired have hearing aid(s), and 84% of them have binaural treatment

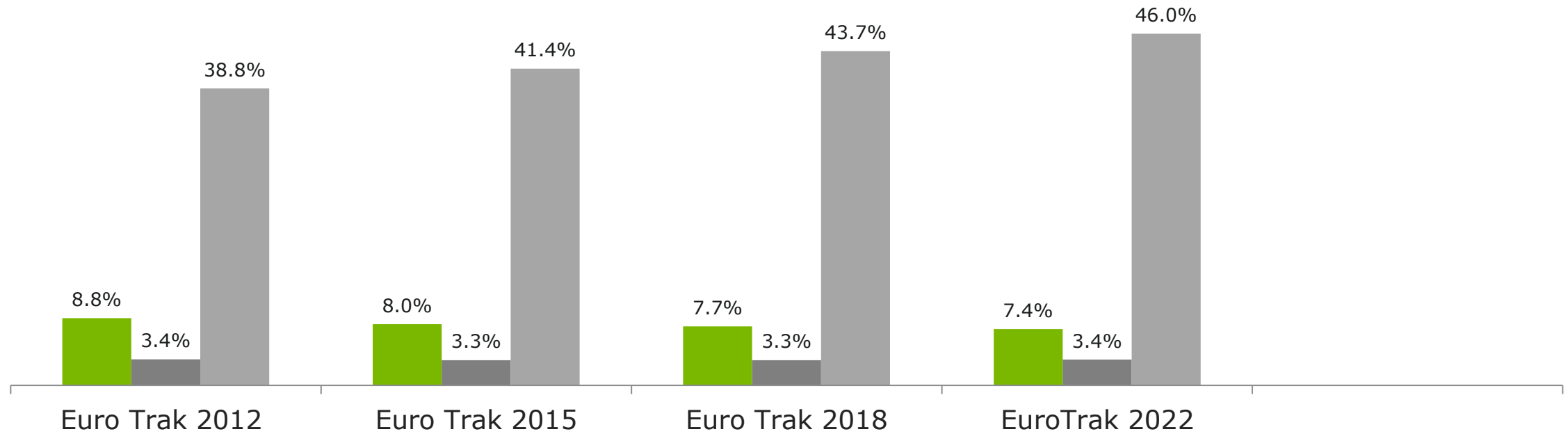


EuroTrak 2018
HA owners (n=640)

EuroTrak 2022
HA owners (n=651)

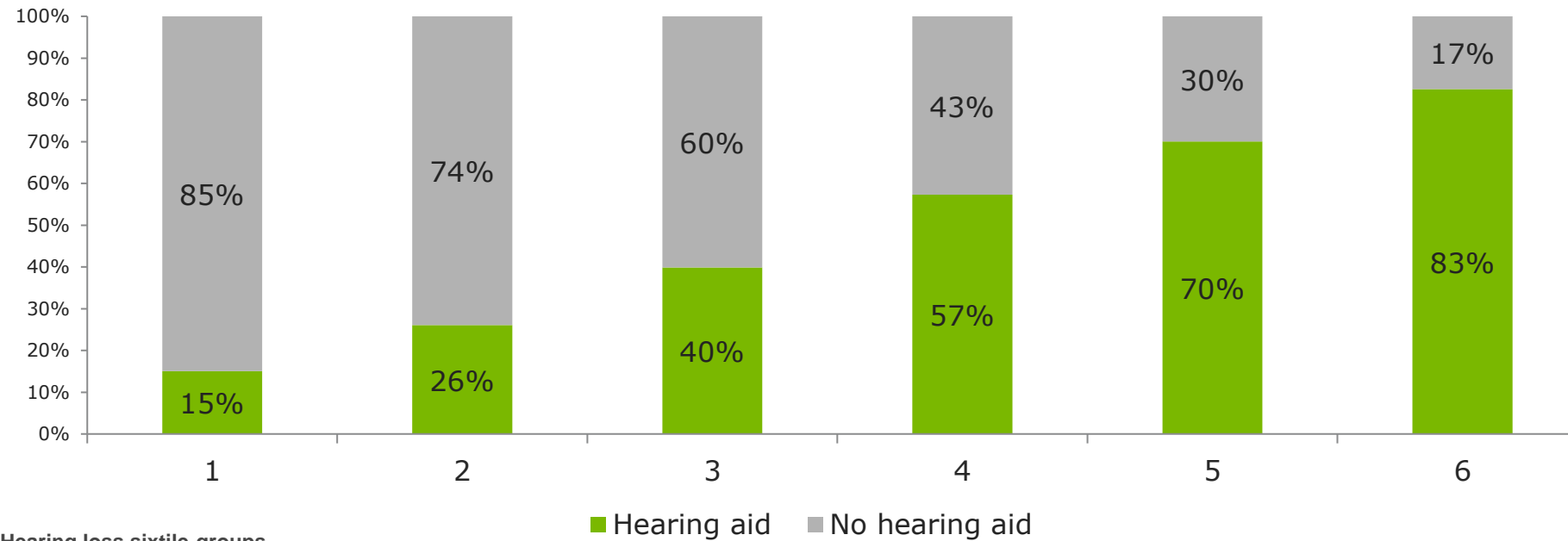


Overview hearing loss prevalence and hearing aid adoption



■ Hearing impaired (self-stated) ■ HA Adoption rate (people with hearing aids in % of population) ■ HA Adoption rate (people with hearing aids in % of hearing impaired)

The more severe the hearing loss, the higher the adoption rate



HA-non-owner, n=525
HA-owner, n=799

* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC - like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	HA-Non-owner n=525	HA Owner n=799	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	40%	12%	21%
Bilateral loss	60%	88%	57%
Perceived loss			
Mild	42%	11%	19%
Moderate	47%	51%	49%
Severe	6%	29%	75%*
Profound	5%	8%	

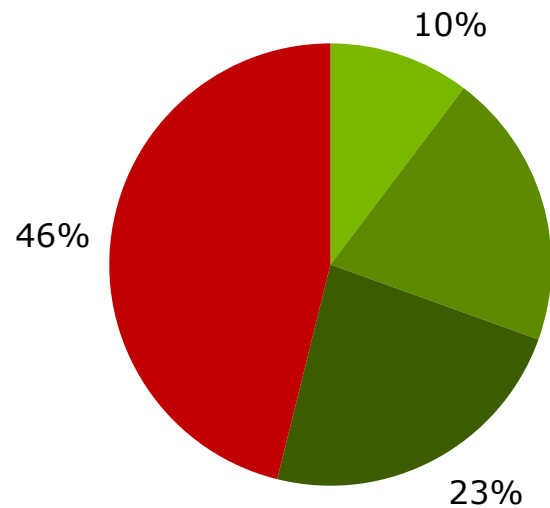
* combined "severe" and "profound" because n is too small

Hearing tests and where hearing is tested

Hearing Tests: 30% had a hearing test in the last 5 years (2018: 34%), most tests done by family doctors

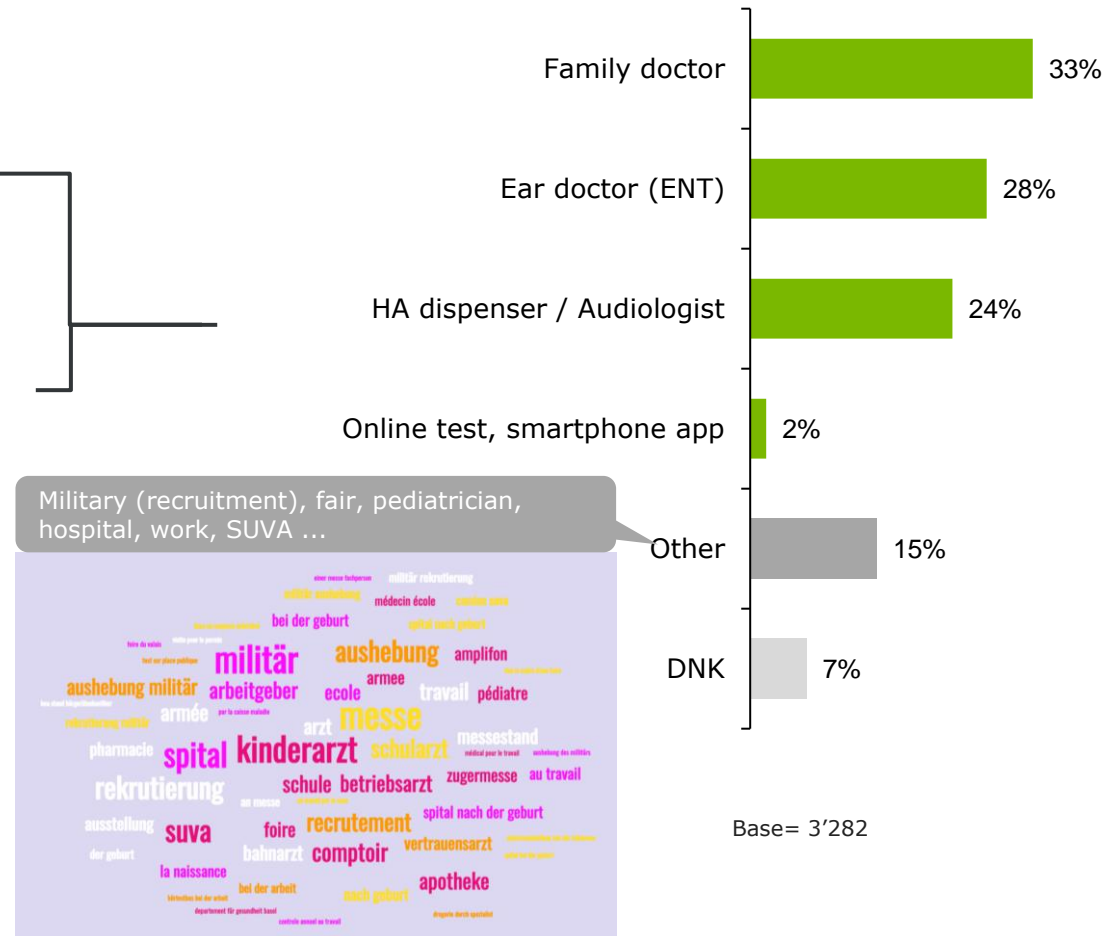
Have you ever taken a hearing test?

- Yes, in the last 12 months
- Yes, in the last 1-5 years
- Yes, more than 5 years ago
- No, never



Base=10'359

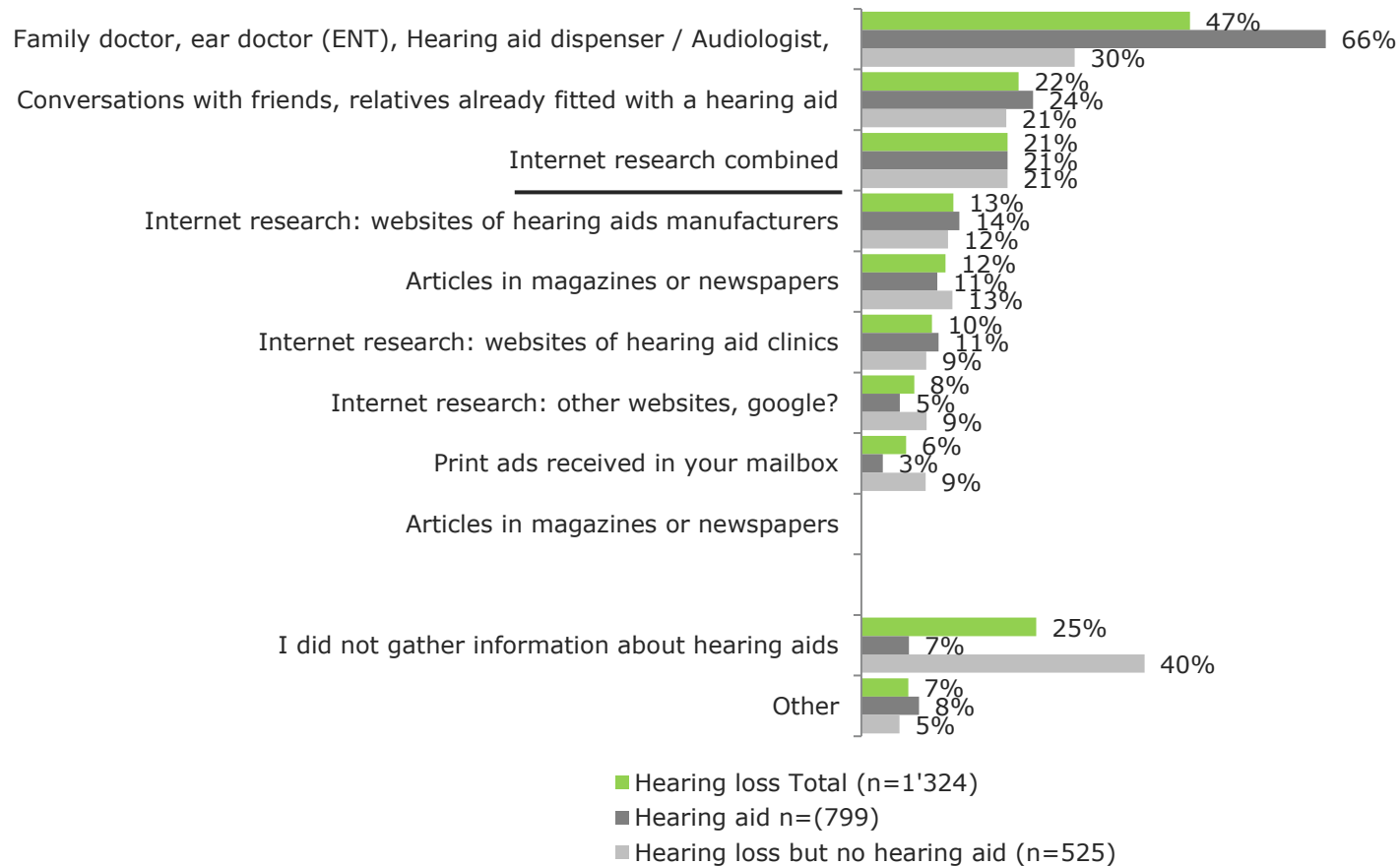
Where/how was your hearing tested?



The route to the hearing aid: Sources of information and drop-out rates

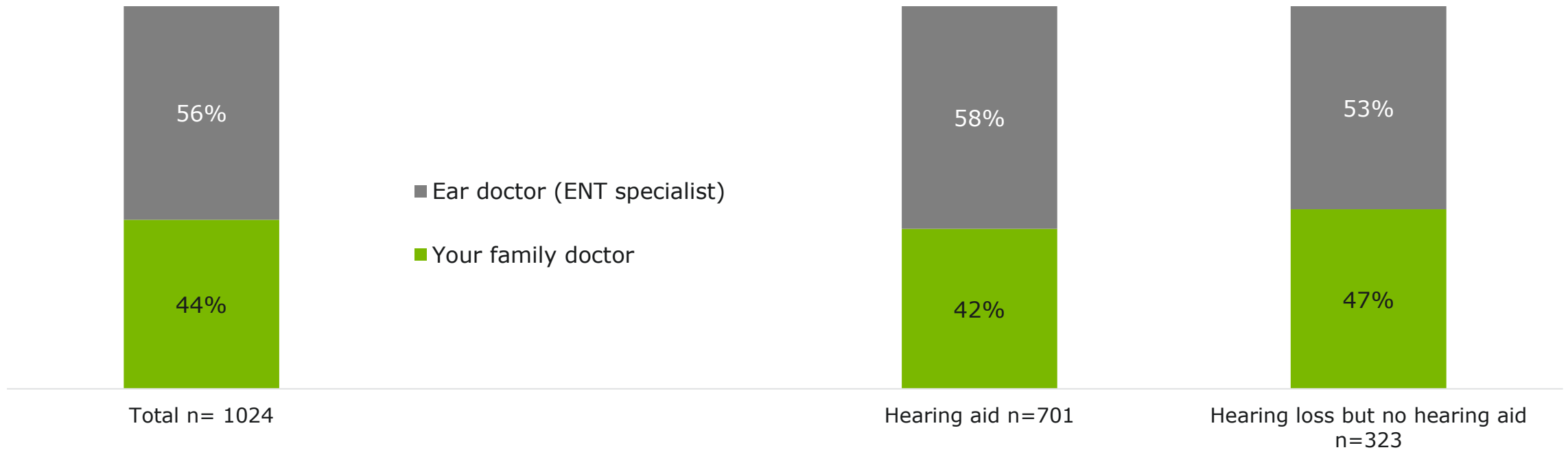
Doctors/HCPs are the most important sources of information and therefore the major gatekeepers.

Where did you gather information about hearing aids?

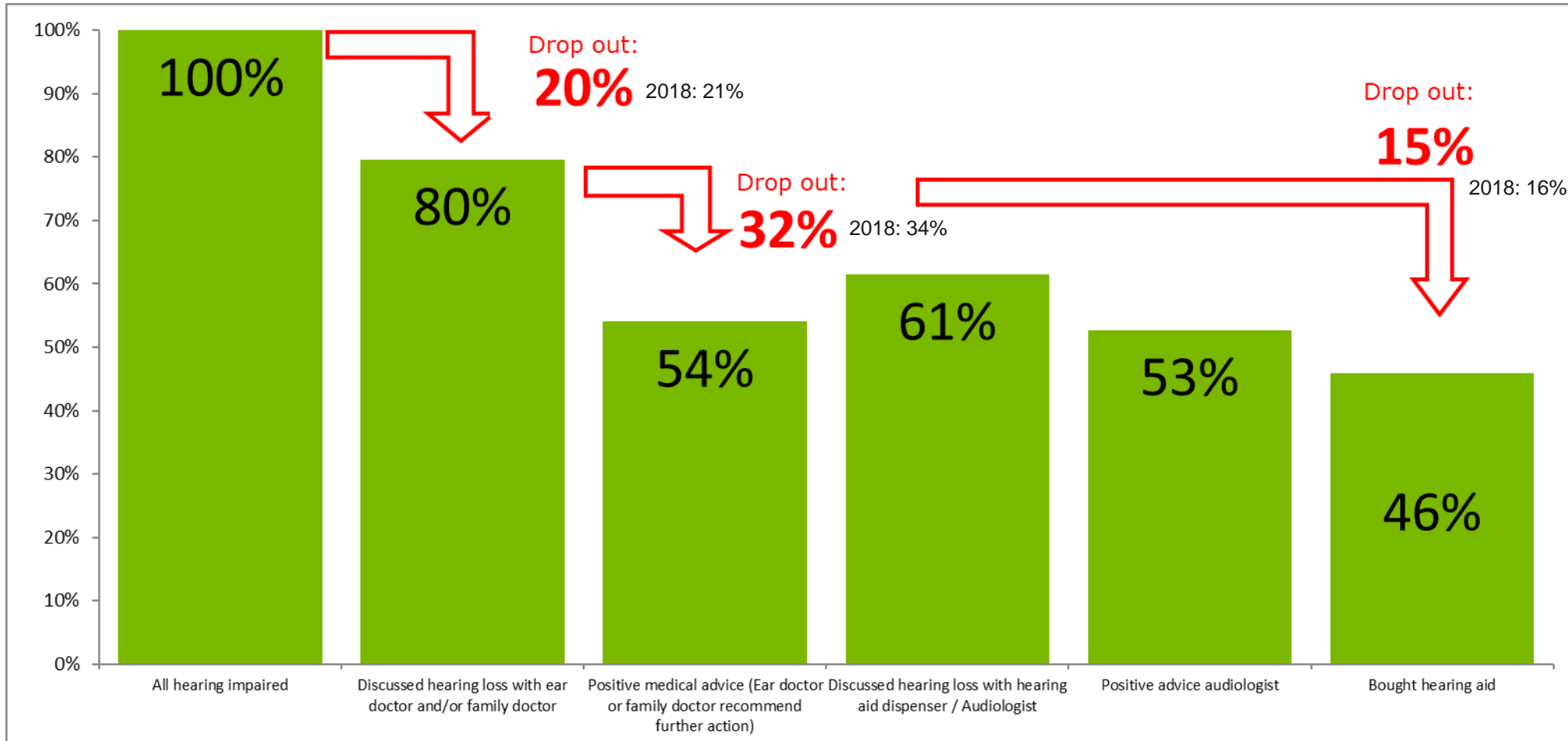


Of those who discussed the hearing loss with a doctor, 56% talked to a ear doctor (ENT) first and 44% talked to an GP first

Those who discussed hearing loss with family doctor and/or ENT:
 Who was the doctor you discussed your hearing loss with for the **first time** – your family doctor or the Ear, Nose and Throat specialist (ENT)?



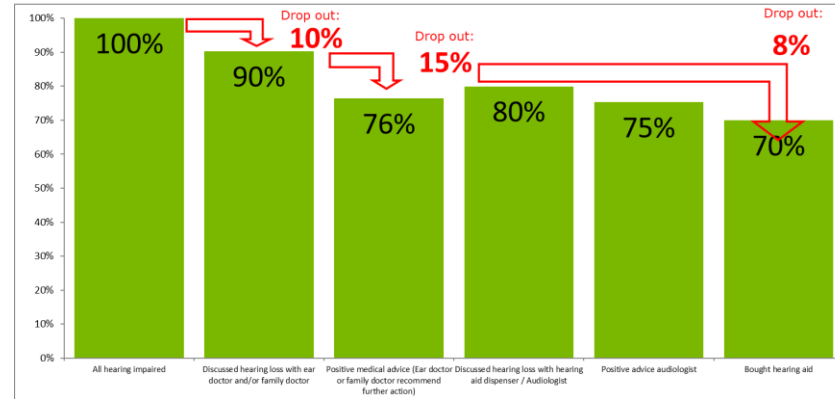
The route to the hearing aid



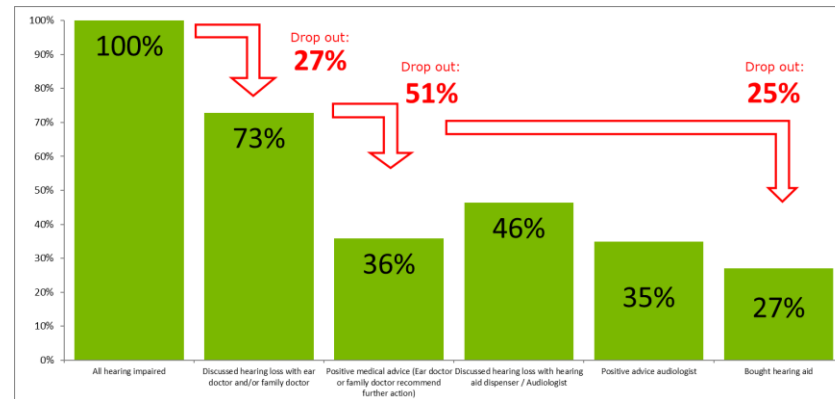
n=1'324

Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*



Low 50% hearing loss*



n=1'324

* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC - like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

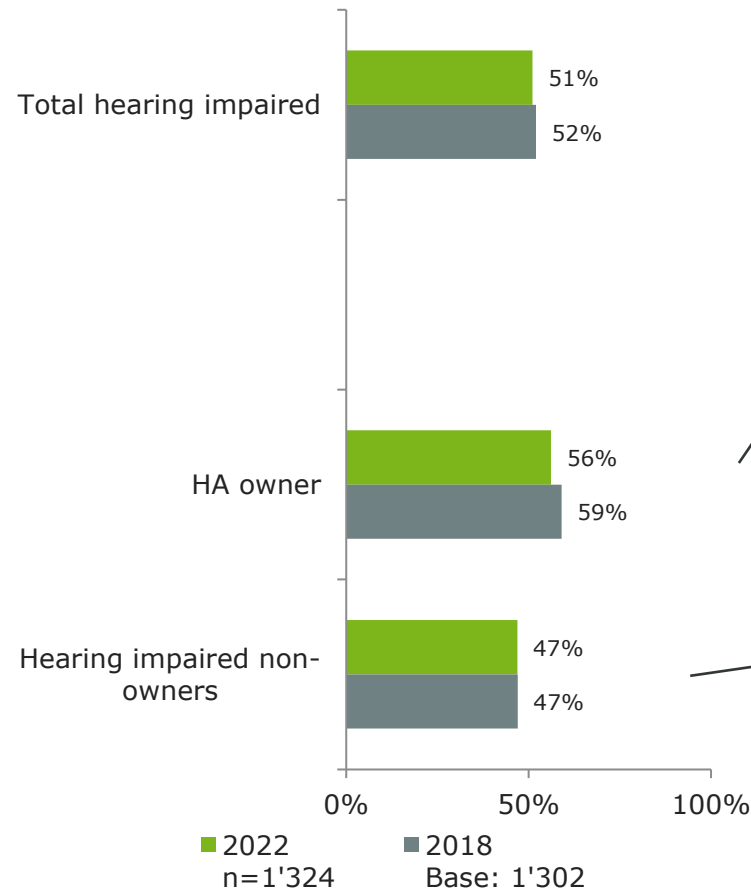
→ People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



The route to the hearing aid: GP/Family doctor

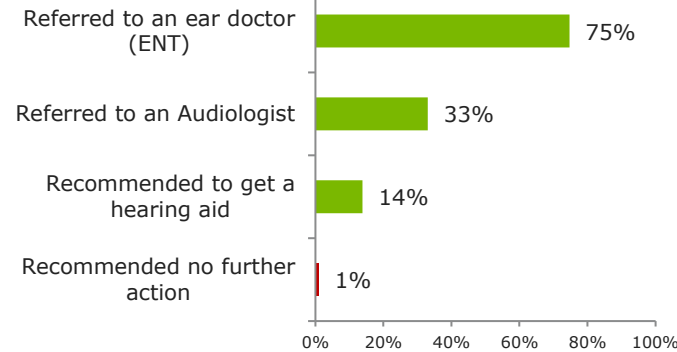
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

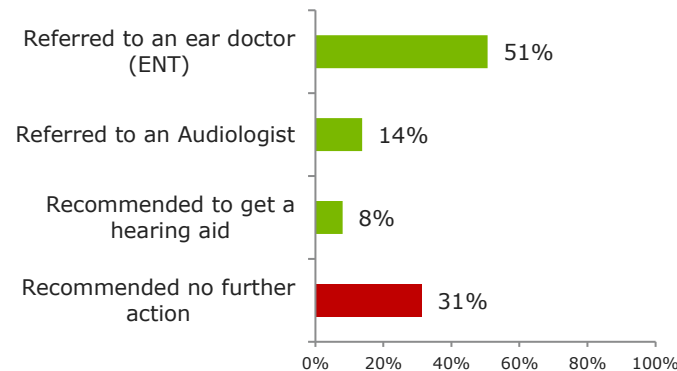


What did he/she recommend ?

HA owner (n=423)



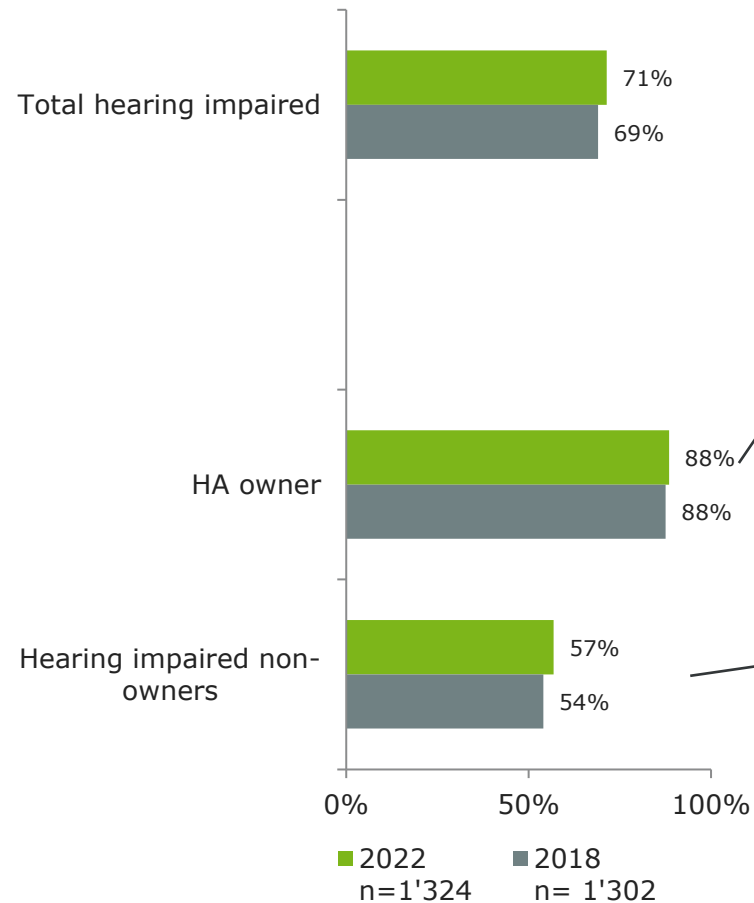
Impaired non-owner (n=233)



The route to the hearing aid: ENT

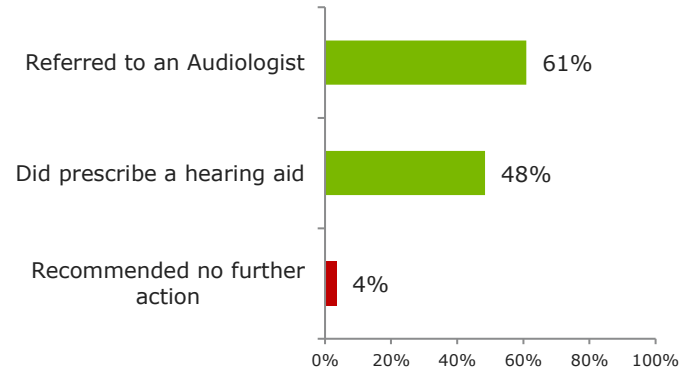
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

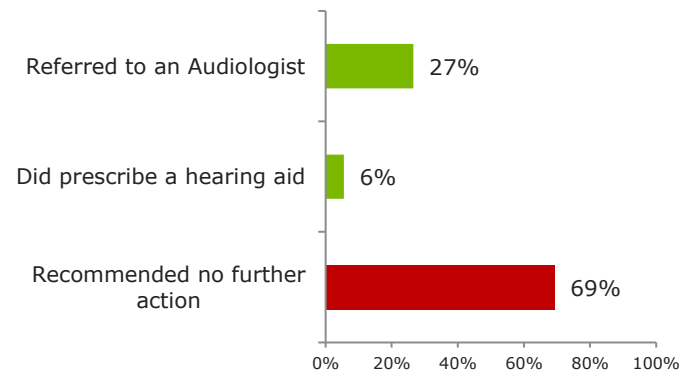


What did he/she recommend ?

HA owner (n=705)



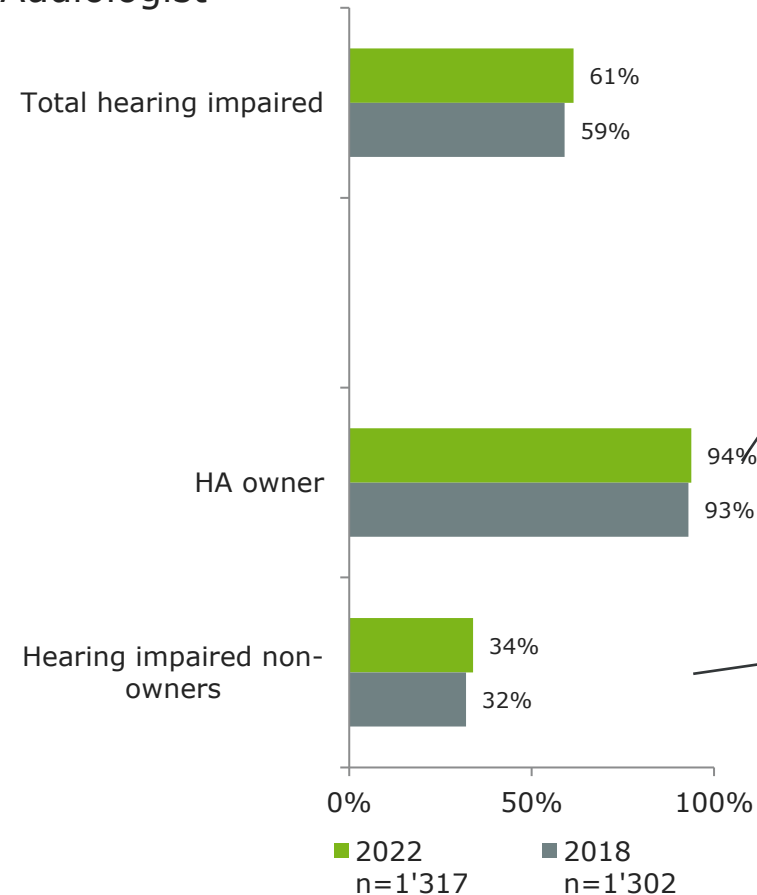
Impaired non-owner (n=277)



The route to the hearing aid: Audiologist

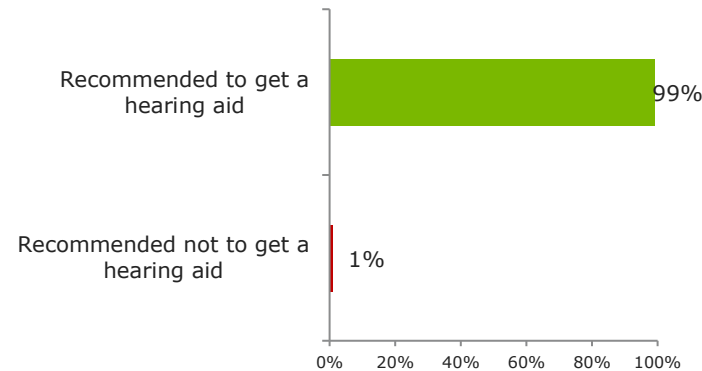
Have you ever discussed your hearing problem with a HA dispenser / Audiologist?

% Discussed with HA dispenser/
Audiologist

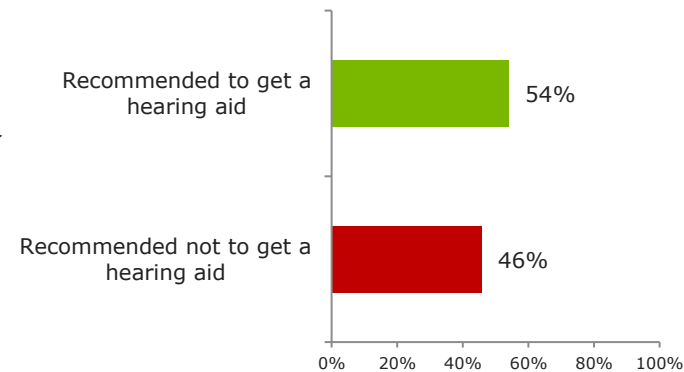


What did he/she recommend ?

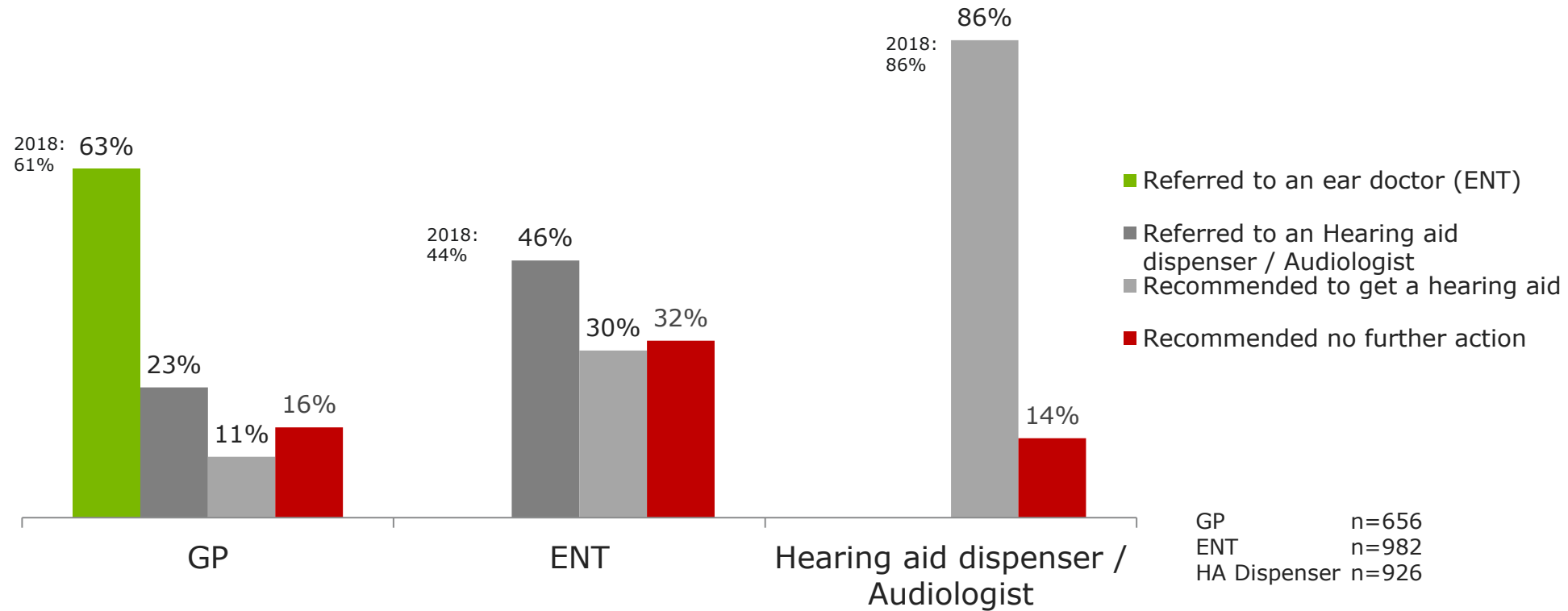
HA owner (n=751)



Impaired non-owner (n=175)



Recommendations by profession



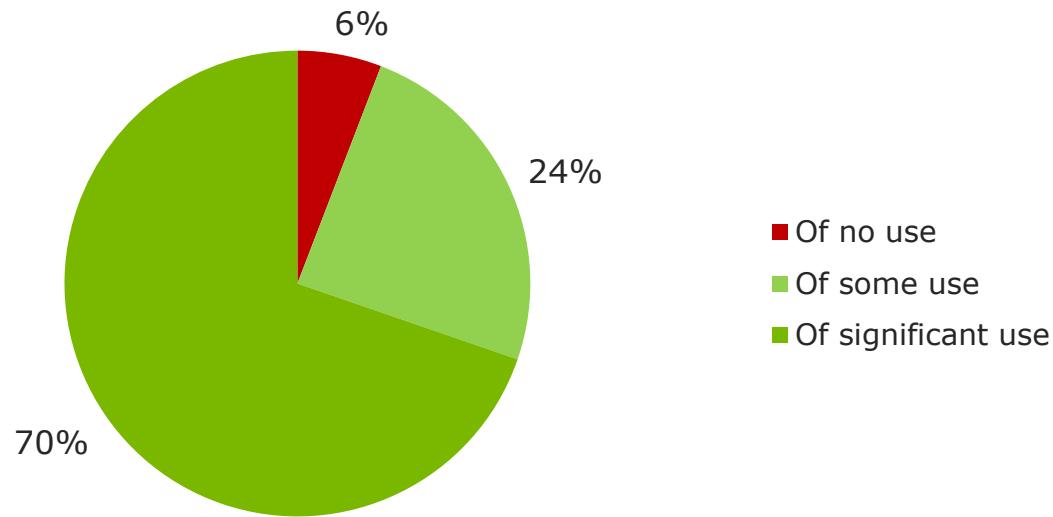
Sums can add to more than 100% (multiple responses)



Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities

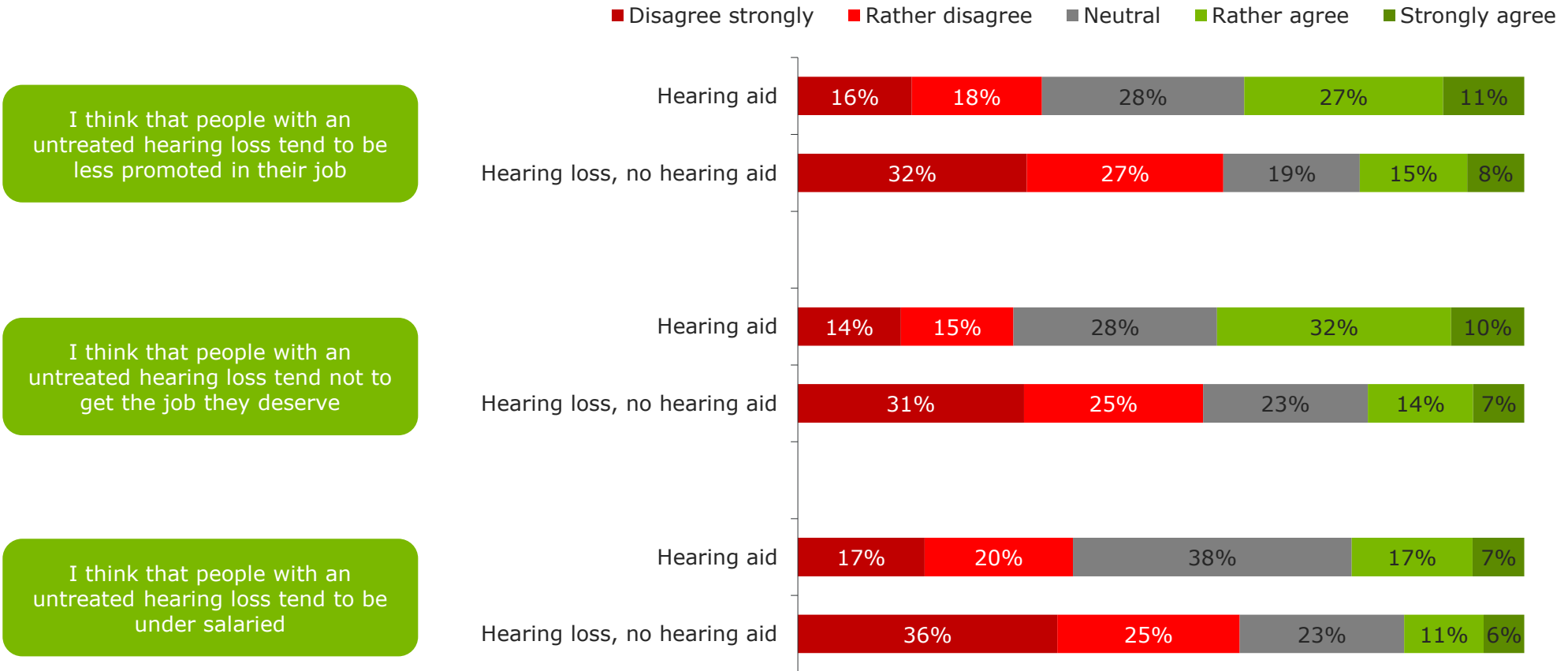
Work competitiveness: 94% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?



n=179

Work competitiveness: People with hearing aids recognize that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to get more salary.



Base: Hearing loss, hearing aid n=471 / No hearing aid n=367



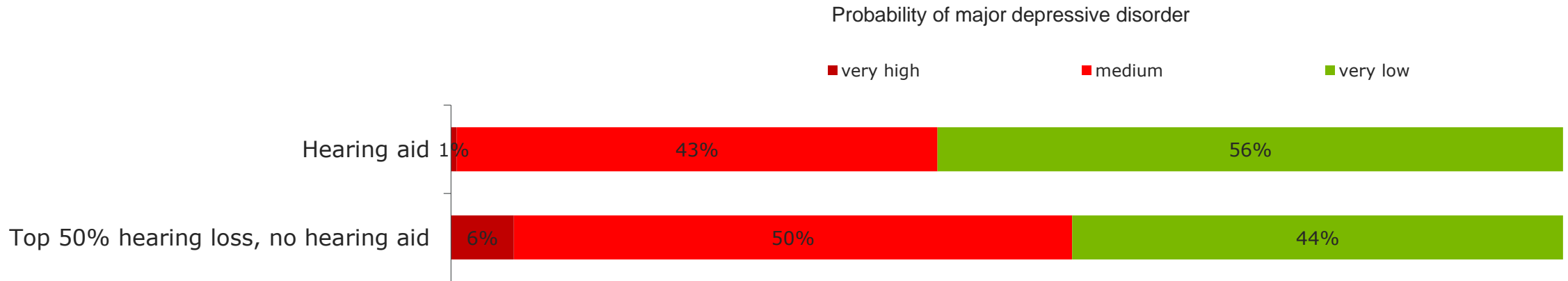
General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*).

Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

- Little interest or pleasure
- Feeling down, depressed, hopeless



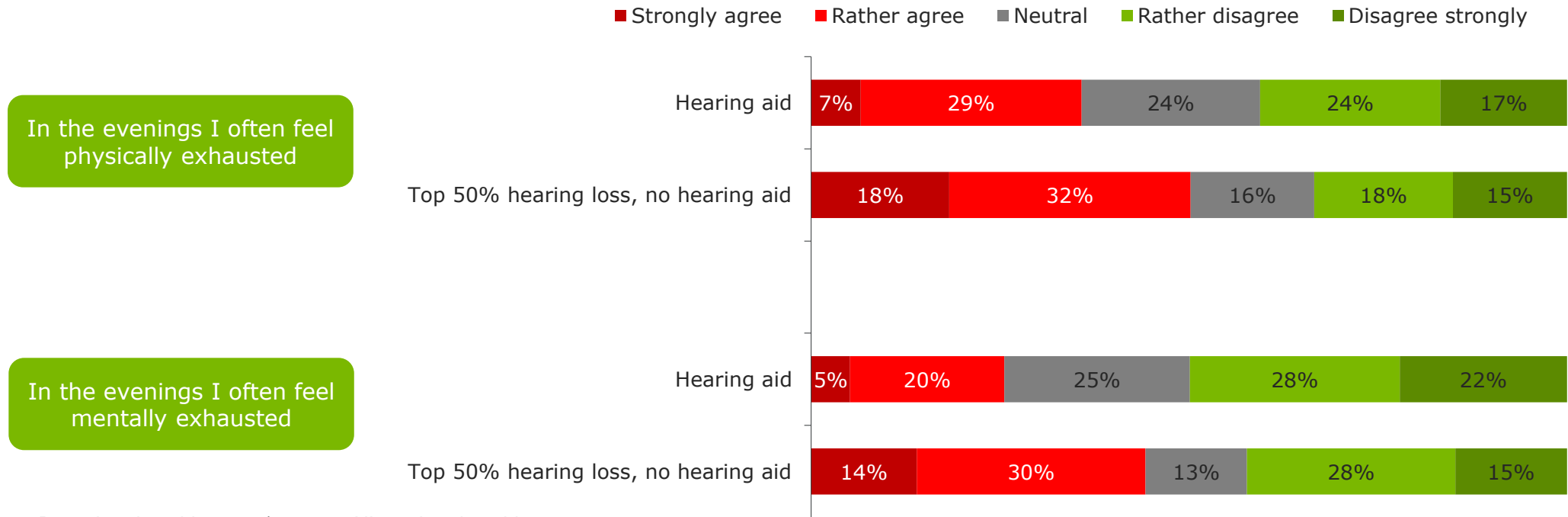
Base: hearing aid n=683 / top 50% HL, no hearing aid =103

*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- Number of ears impaired (one or two)
 - Stated hearing loss (Mild to Profound)
 - Scores on 6 APHAB-EC - like questions (Scaled 1-5)
 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top50% hearing loss group*), hearing aid owners feel less exhausted in the evenings



Base: hearing aid n=671 / top 50% HL, no hearing aid =102

*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

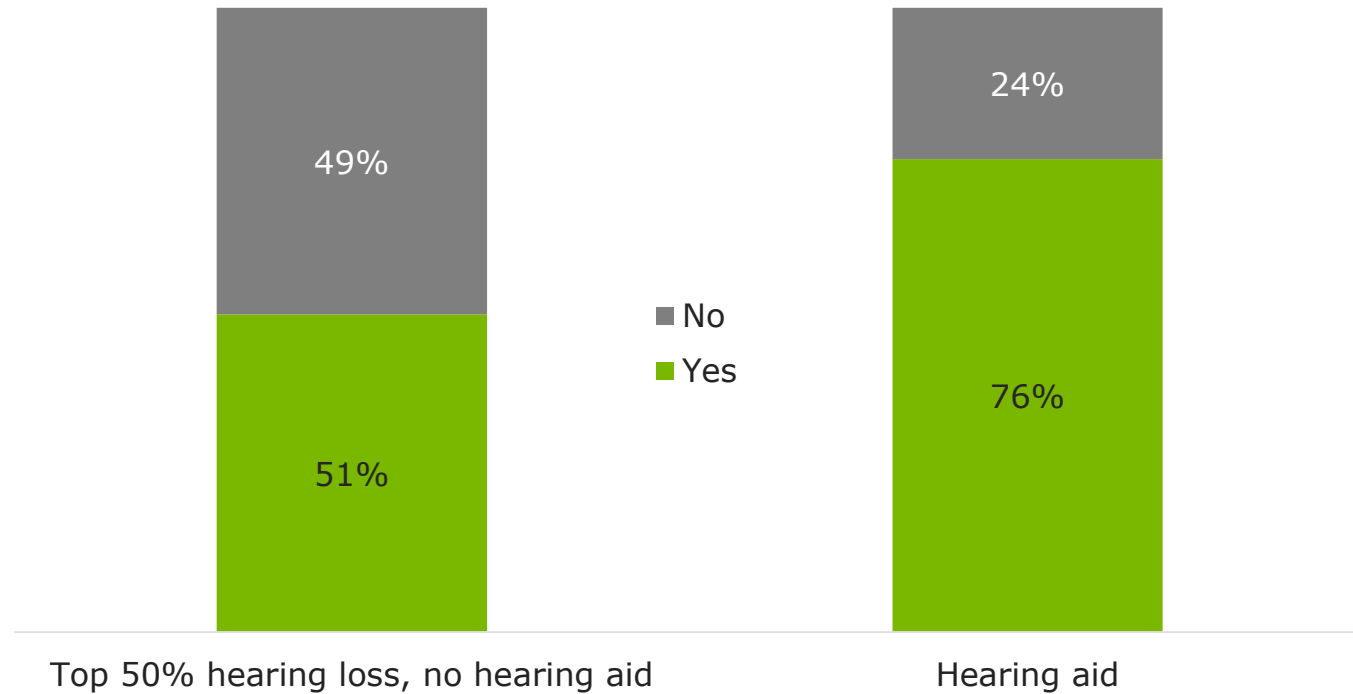
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC - like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

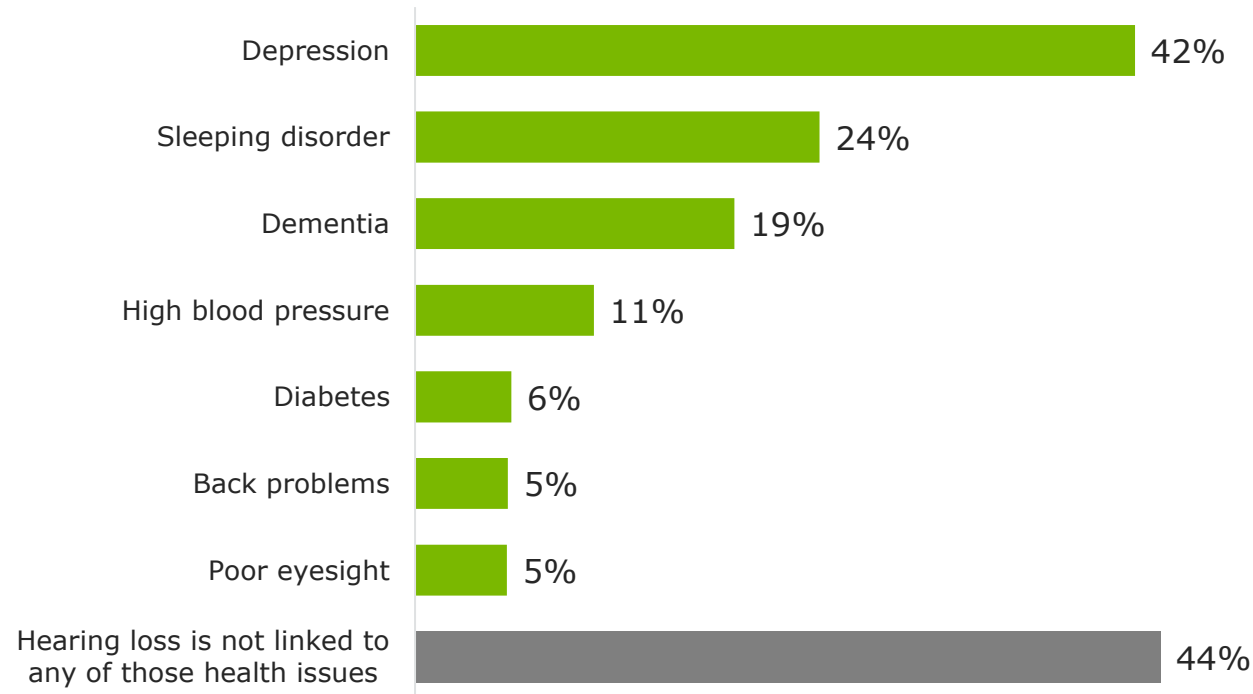
Are you generally satisfied with the quality of your sleep?



Base: Top 50% HL, no hearing aid n=103 / top 50% HL, Hearing aid =683

42% of all hearing impaired think that hearing loss could be linked to depression and/or sleeping disorder

Please tick all of the health issues below which you think could be linked to one's hearing loss.



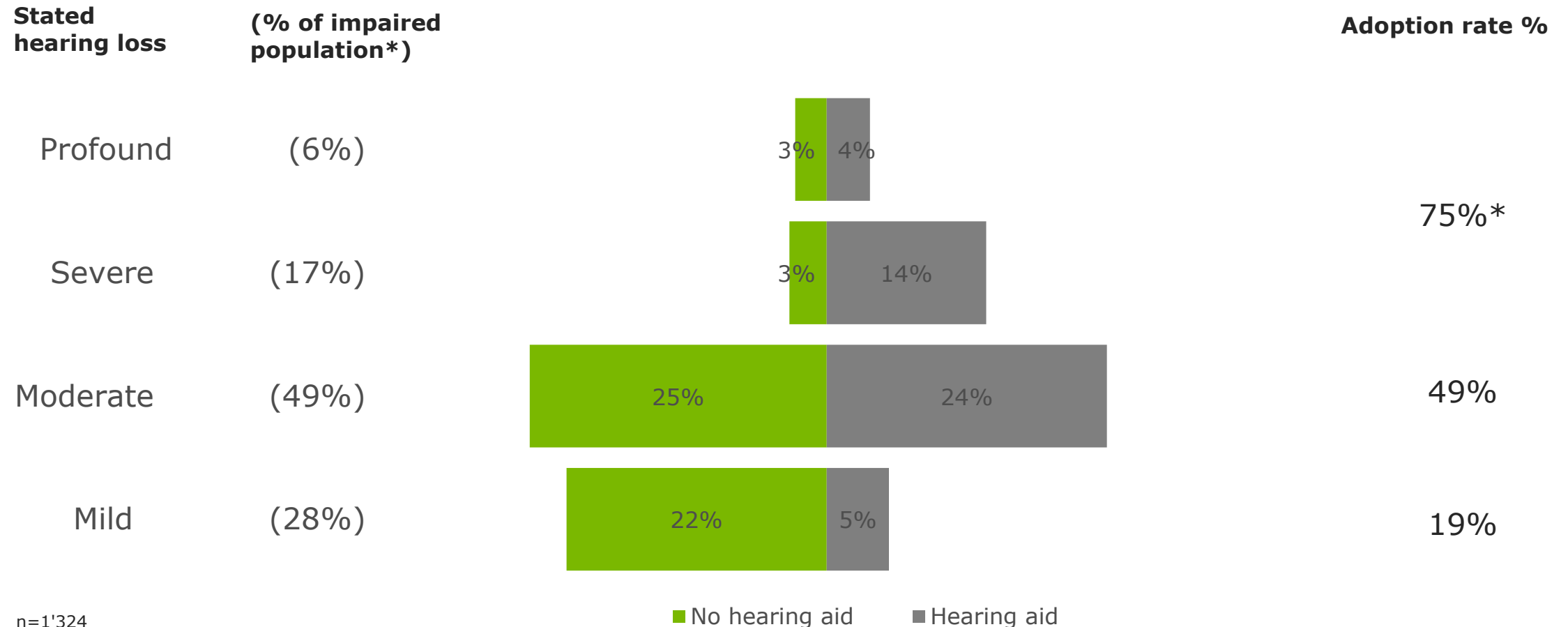
Hearing impaired, n=1'324



3. Analysis of hearing aid owners

Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage

Low adoption rates within mild hearing loss



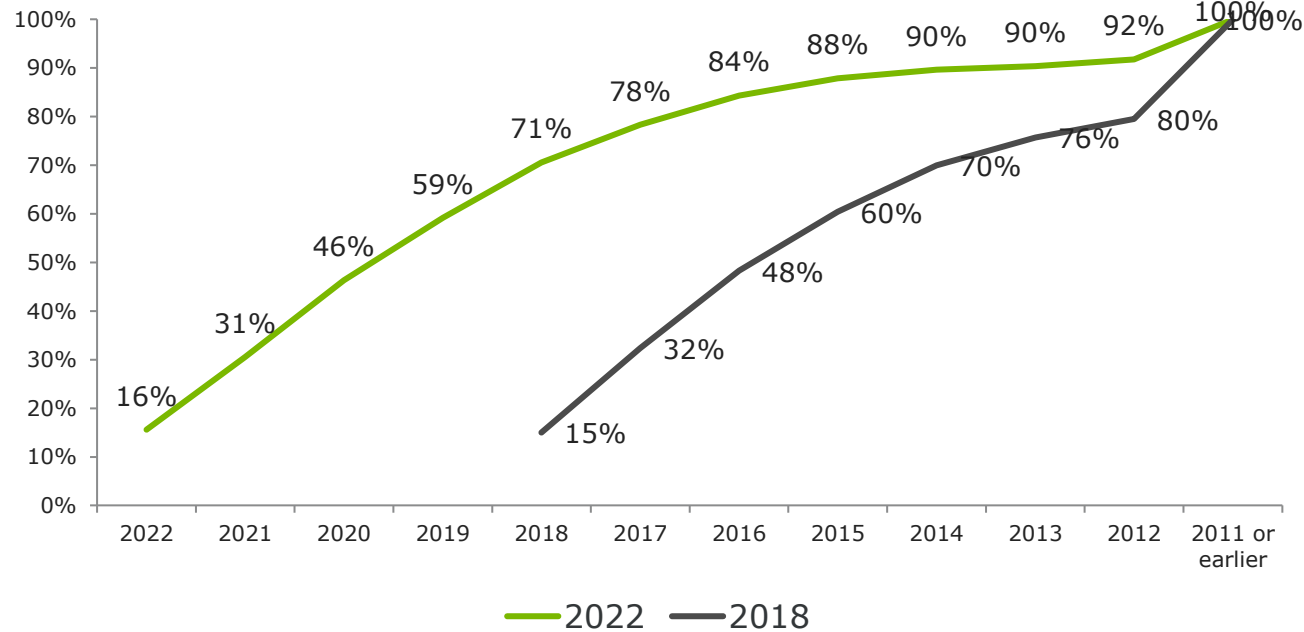
n=1'324

Sums can differ from 100% due to rounding

* combined "severe" and "profound" because n is too small

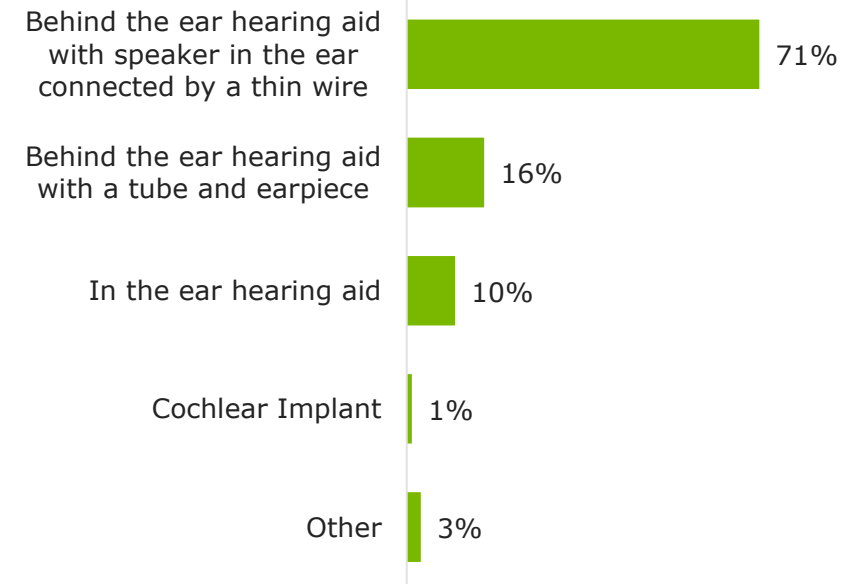
59% of the currently owned HAs were acquired in 2019 or later
 RIC is the most often purchased type of HA.

Year of purchase



Age of currently owned HAs (Mean):
 2022: 4.1 years
 2018: 4.1 years

Type of HA

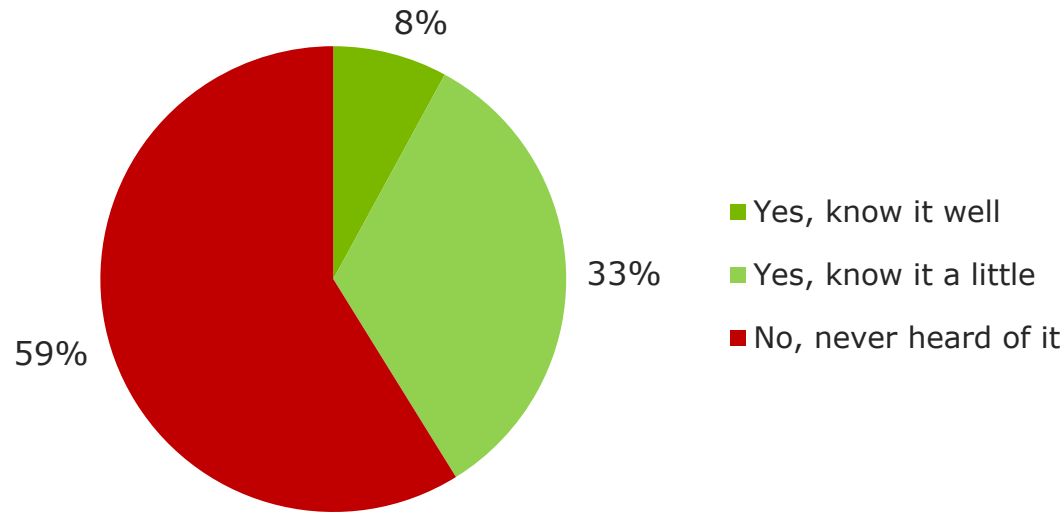


HA-owner, n=799



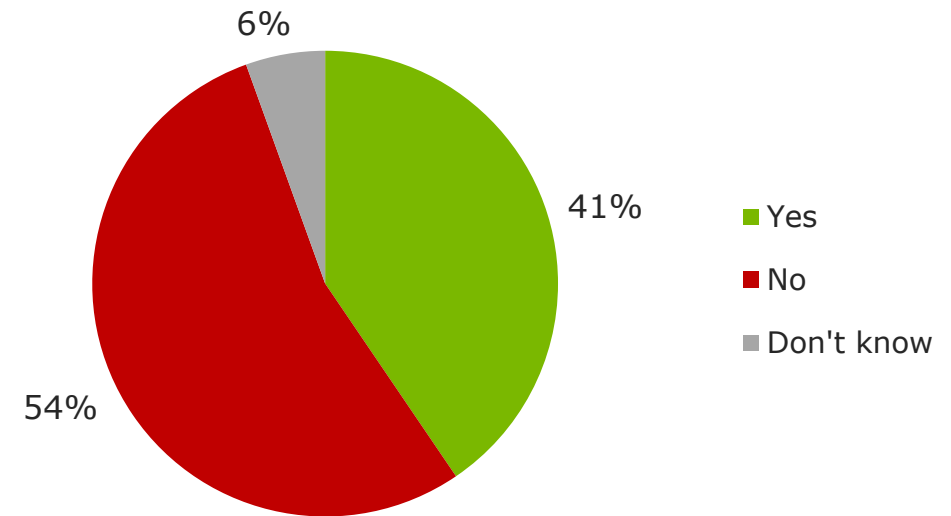
59% of the population in SUI have never heard of Cochlear Implants. 41% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.

Do you know what a cochlear implant (CI) is?



n=3'998

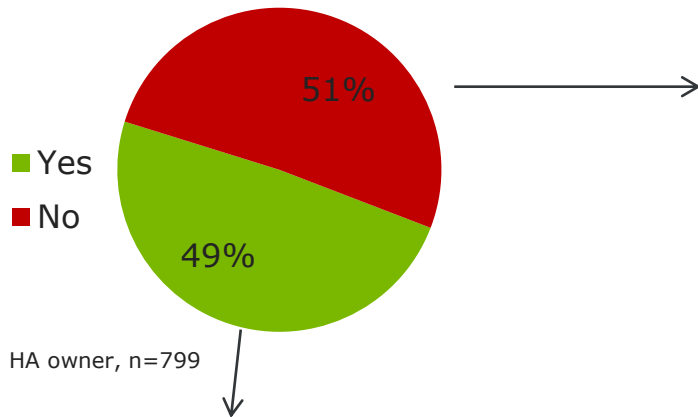
Have you been informed about cochlear implants by a medical professional?



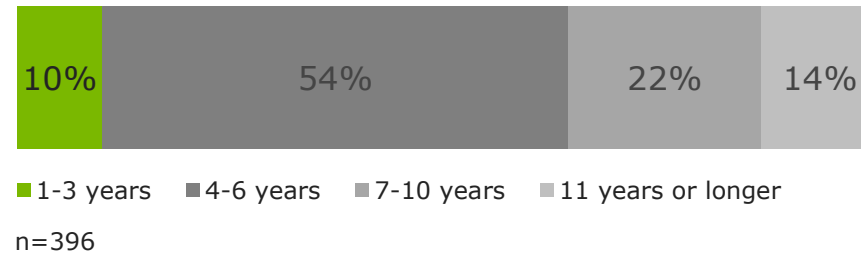
n=281 (HA owners with severe/profound HL)

Hearing aids are used for 6 years before they are replaced. Mostly below 3 years pass between becoming aware of the hearing loss and purchasing hearing aids

Current HAs = first HAs?



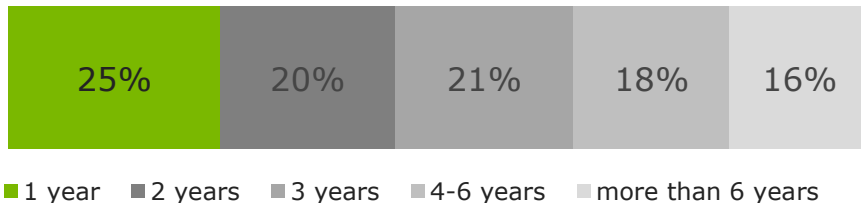
How many years did you own your previous HAs?



Age of HA before it has been replaced:
 2022: 6 years (median)
 2018: 6 years (median)

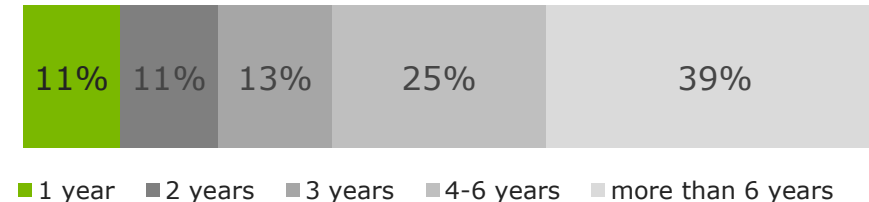
HA owners (1st HA):

Thinking back before you acquired your first hearing aid: How many years have passed since you became aware of your hearing loss until you acquired a hearing aid?



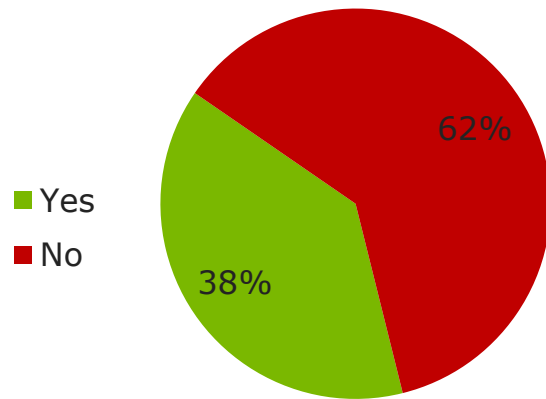
HA non owners:

How many years had passed since you became aware of your hearing loss?



38% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

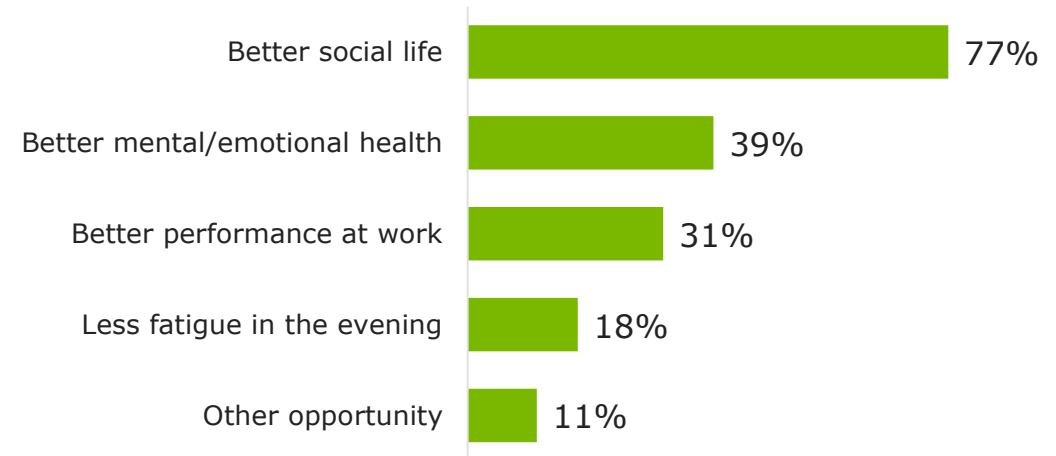
Thinking back before you obtained your first hearing aid(s): do you think, you should have gotten them sooner?



HA-owner, n=799

IF YES:

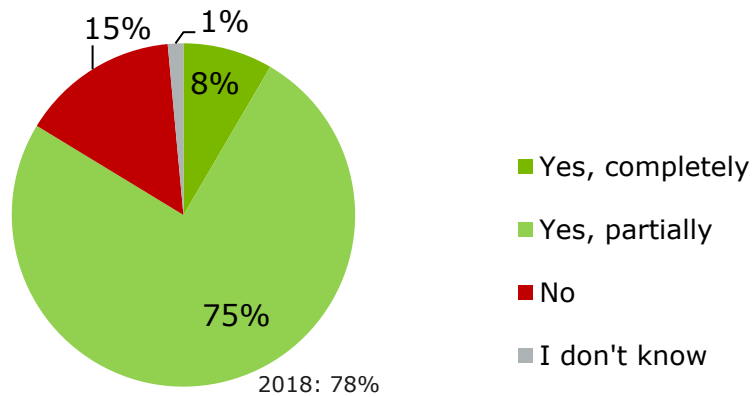
What are the reasons why you think you should have gotten your hearing aid(s) sooner? What are the opportunities you think you have missed because of this? Please tick all that apply



n=330

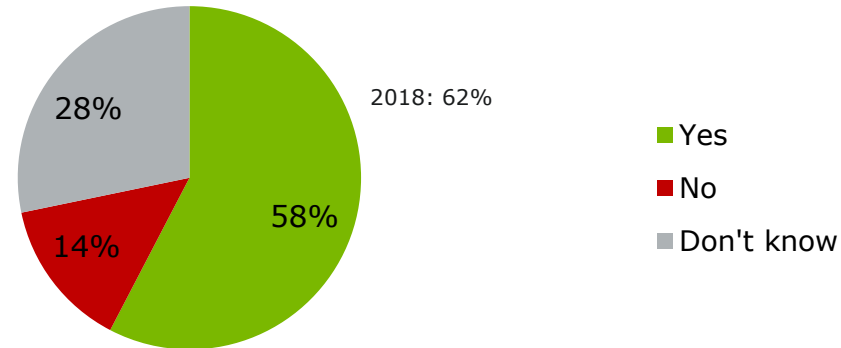
83% of the hearing aid owners received some 3rd party reimbursement (primarily partial)– 58% of the non owners know that they would be eligible for 3rd party

Owners: Has your hearing aid been fully or partially paid for by a third party organization (insurance, government, etc.)?



HA-owner, n=799

Non-owners: Based on your current knowledge, would any part or all of your hearing aid(s) be paid for by a third party? (Insurance, Government, ...)



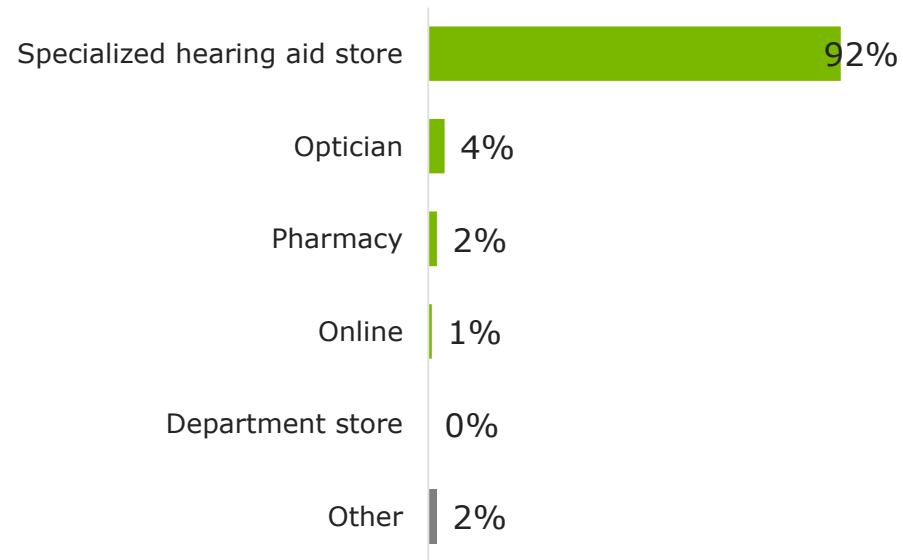
HA-non-owners, n=525



A specialized hearing aid store is the preferred place for obtaining hearing aids (both for owners and non owners).

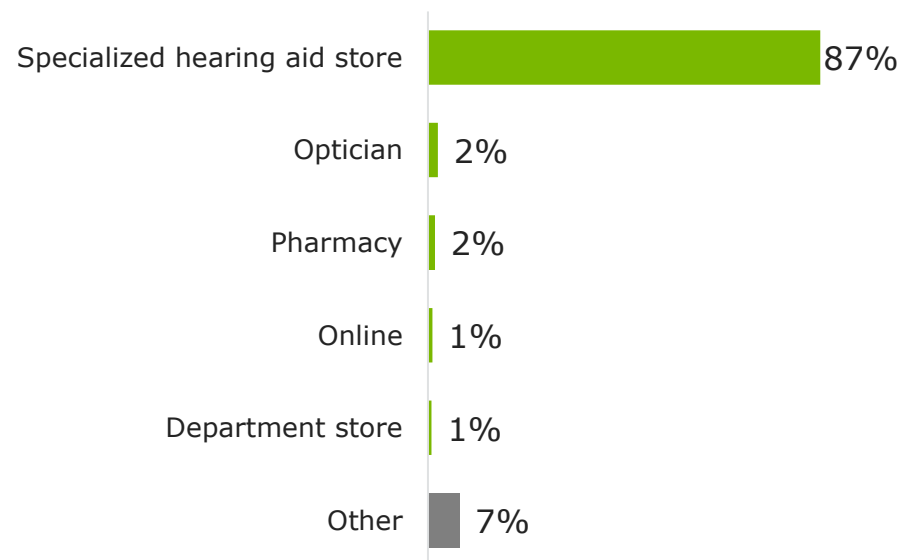
Owners:

Where was your most current hearing aid obtained?



HA-owner, n=799

Non-owners: If you were to get hearing aids, where would you go?

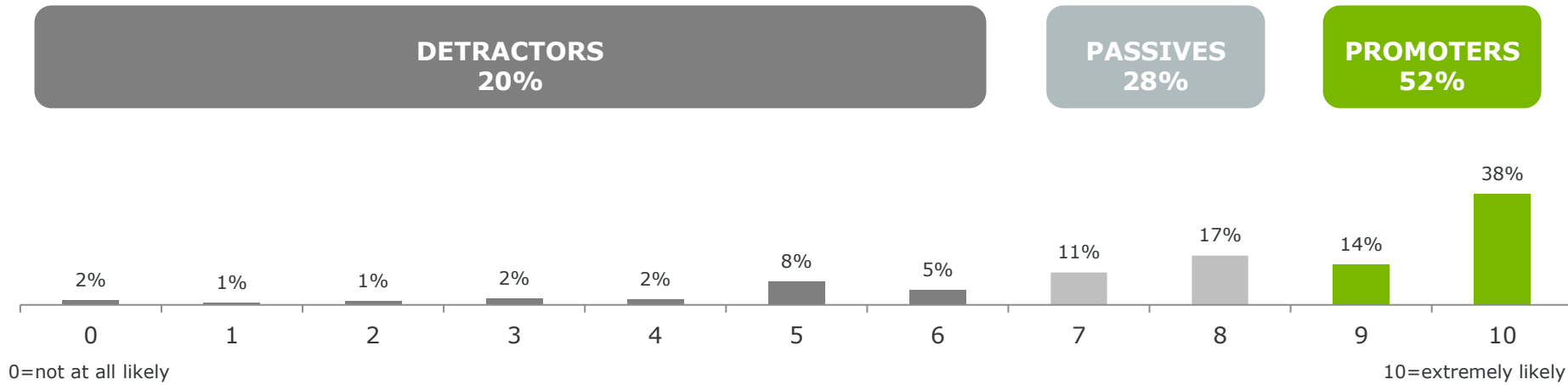


HA-non-owner, n=525



Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 31.

Considering your complete experience, how likely would you be to recommend the place where you obtained your hearing aids to a friend or colleague?



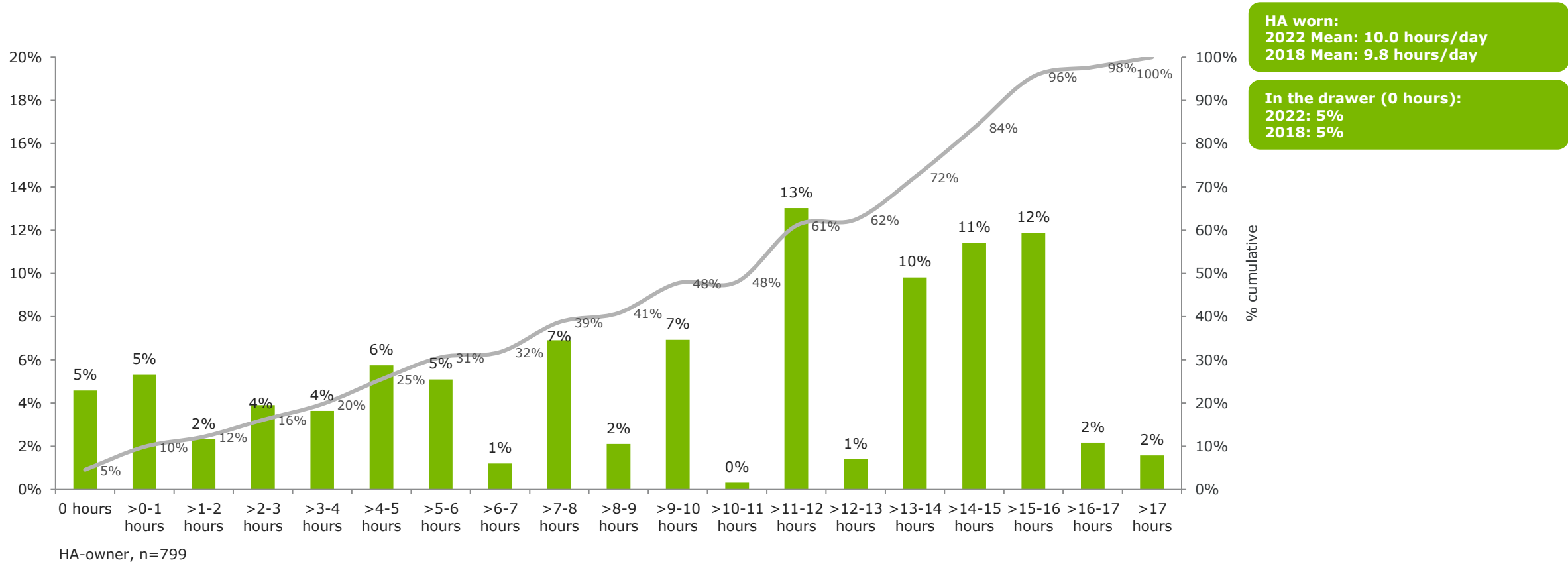
NPS = PROMOTERS – DETRACTORS = 31 (exact figure rounded)

HA-owner, n=799



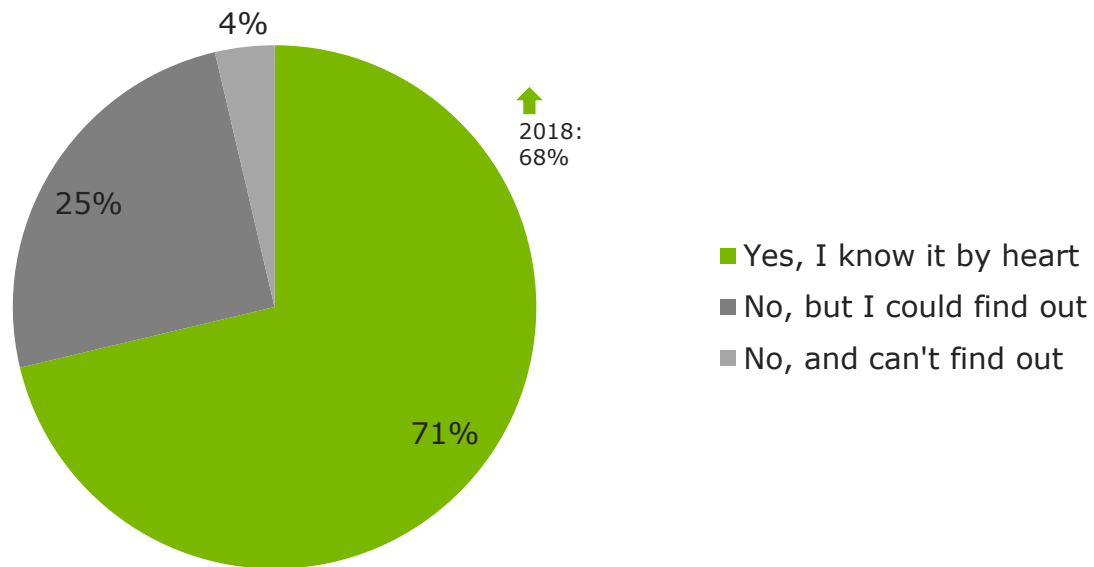
On average, HAs are worn 10 hours a day

How many hours a day are HA worn?



71% of today's hearing aid owners are aware of their hearing aid brand

Are you aware of the brand of your hearing aid(s)?

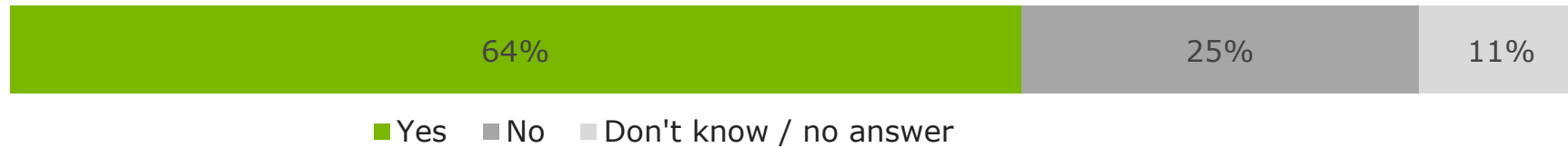


HA-owner, n=799



41% of the HA owners use a hearing aid app, 81% of those are satisfied with it.

Have you been informed by your hearing care professional about hearing aid apps?
(HA owners, n=799)



Do you personally use apps for your hearing aids?
(HA owners, n= 799)

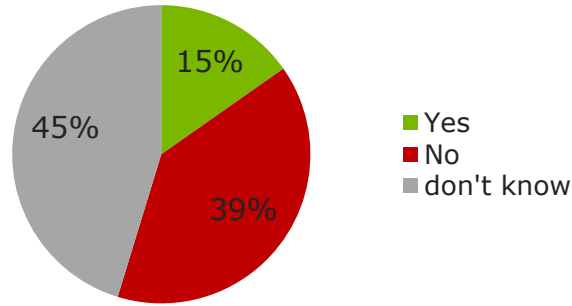


IF APPS USED (n=358):
Overall, how satisfied with the performance of your apps?



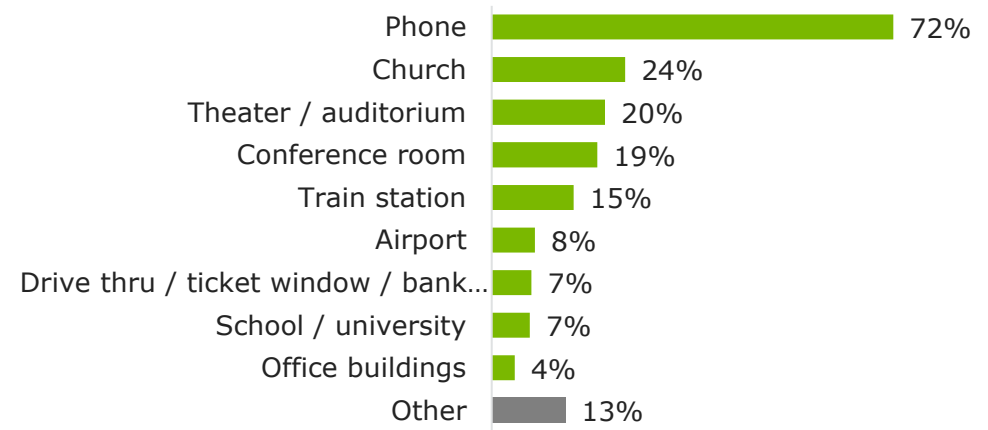
15% of the HAs are (to the knowledge of the owners) equipped with Telecoil—the primary usage of Telecoil with the phone, in churches, theatres, and conference rooms.

Are your hearing aids equipped with Telecoil?



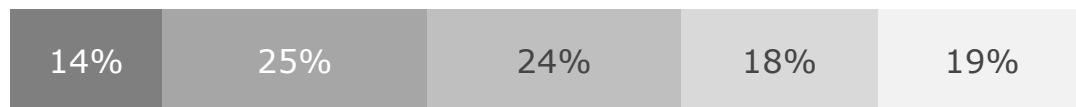
HA-owner, n=799

Where do you use your telecoil to improve your hearing?



HA-owner (use Telecoil), n=142

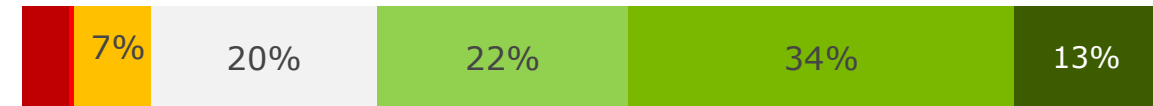
How often do you use the telecoil to improve your hearing?



■ Never ■ Rarely ■ Occasionally ■ Often ■ Very often

HA-owner (equipped with Telecoil), n=150

How satisfied are you with the telecoil option?



■ Very dissatisfied ■ Dissatisfied ■ Somewhat Dissatisfied ■ Neutral ■ Somewhat Satisfied ■ Satisfied ■ Very Satisfied

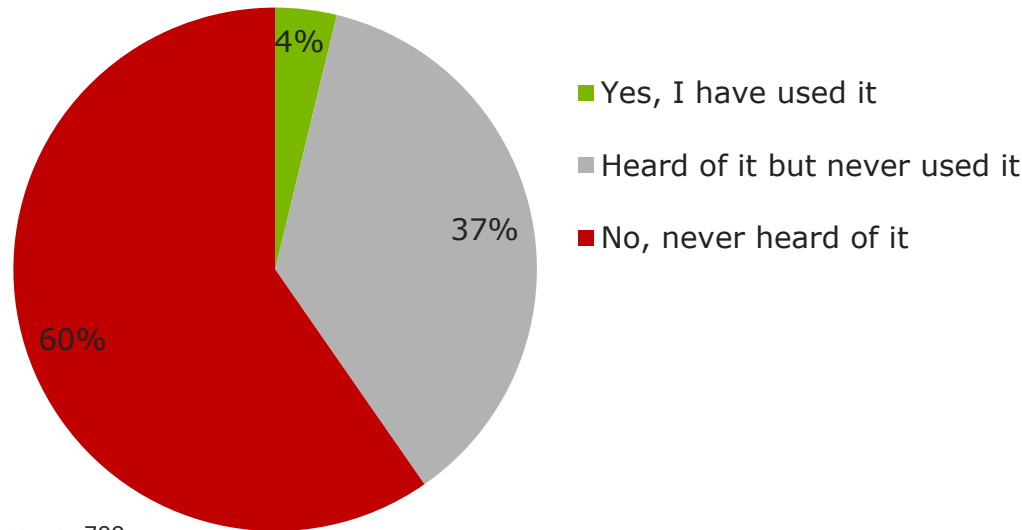
HA-owner (use Telecoil), n=125



4% of the HA owners have already used remote fitting, 37% have at least heard of it, and 60% have never heard of it.

Have you ever heard of Remote fitting for your hearing aids?

(Remote fitting: enables your hearing care professional to fit and fine-tune hearing aids from a distance (in real-time via video chat via an app), so that you don't need to leave your house to get your hearing aids adjusted)

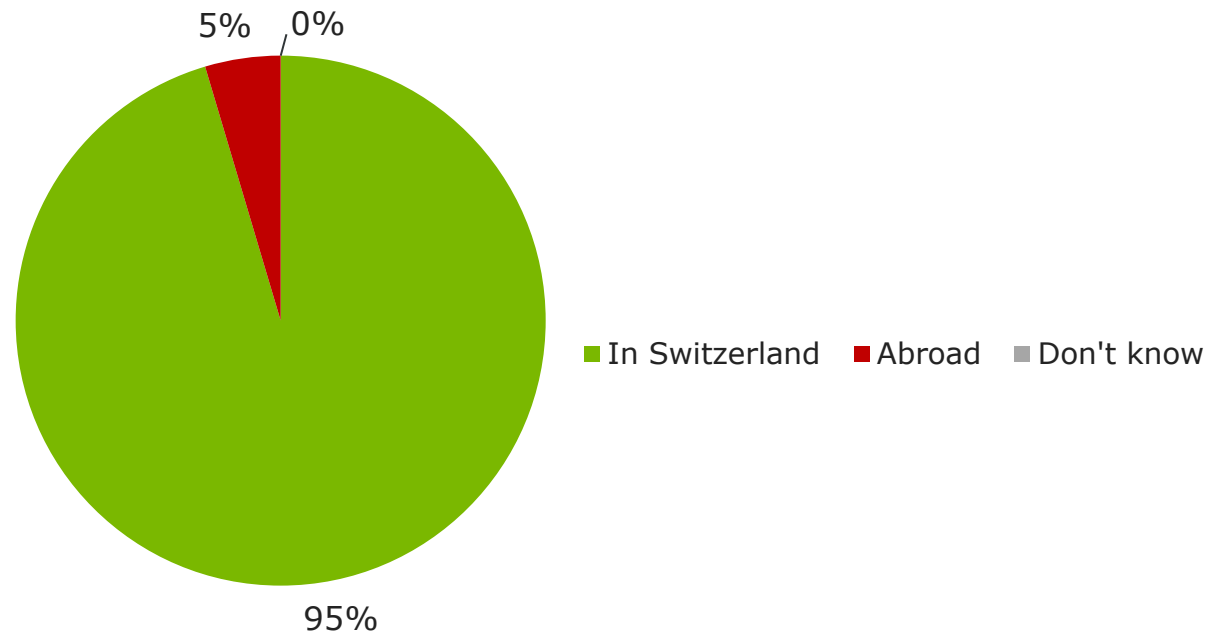


HA-owner, n=799

Satisfaction with hearing aids and drivers

5% have purchased their hearing aids abroad

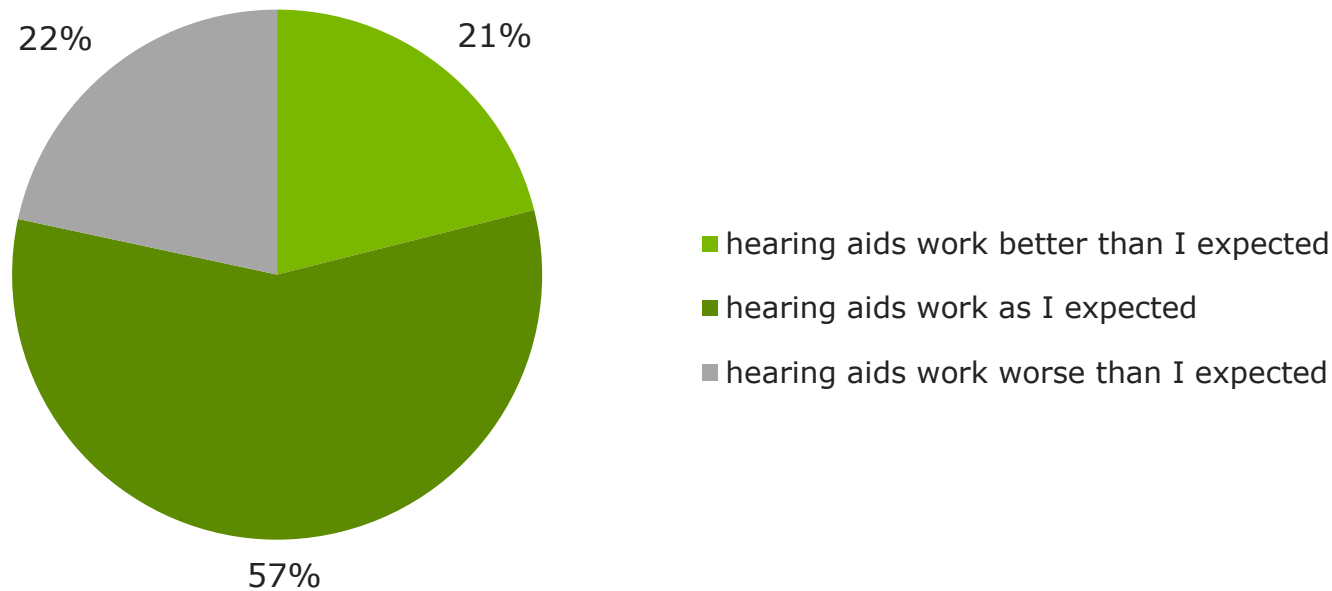
Where did you purchase your hearing aid(s)?



n=799 HA

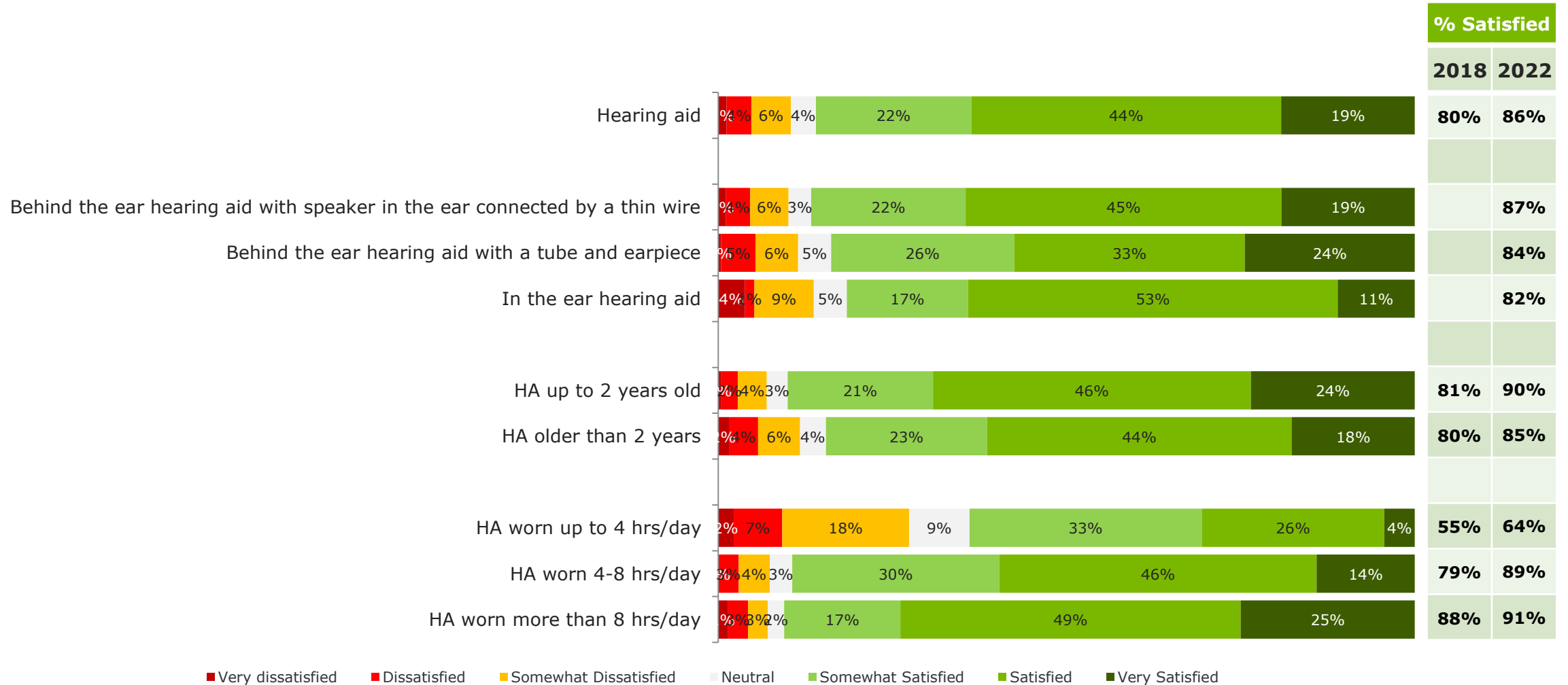
78% (2018: 80%) of the hearing aid owners say their hearing aid works better than or as expected

How have the expectations you had towards hearing aids before trying them on for the first time been met?



n=799

Overall satisfaction with HA: 86% of hearing aid owners are satisfied with their hearing aid(s) (2018:80%)

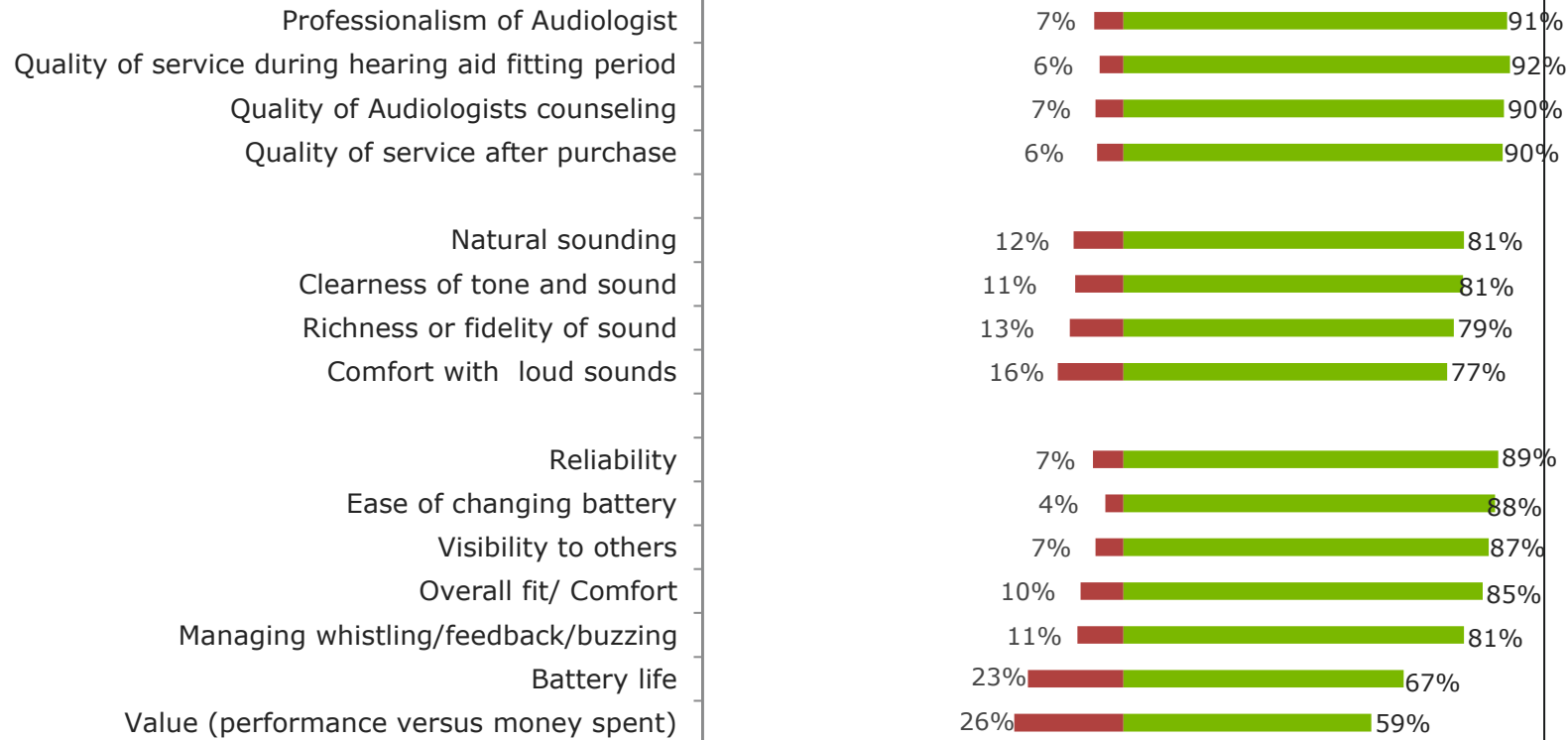


Satisfaction with current hearing aids

HA dispenser/
Audiologist

Sound quality
signal process.

Product
features



Trend*
+/-0%
+2%
+/-0%
+1%
+3%
+3%
+3%
+8%
+1%
-2%
-2%
-1%
+3%
+3%
+2%

%dissatisfied= % very dissatisfied + % dissatisfied + % somewhat dissatisfied
%satisfied= % somewhat satisfied + % satisfied + % very satisfied

*% of satisfied HA owners compared to 2018

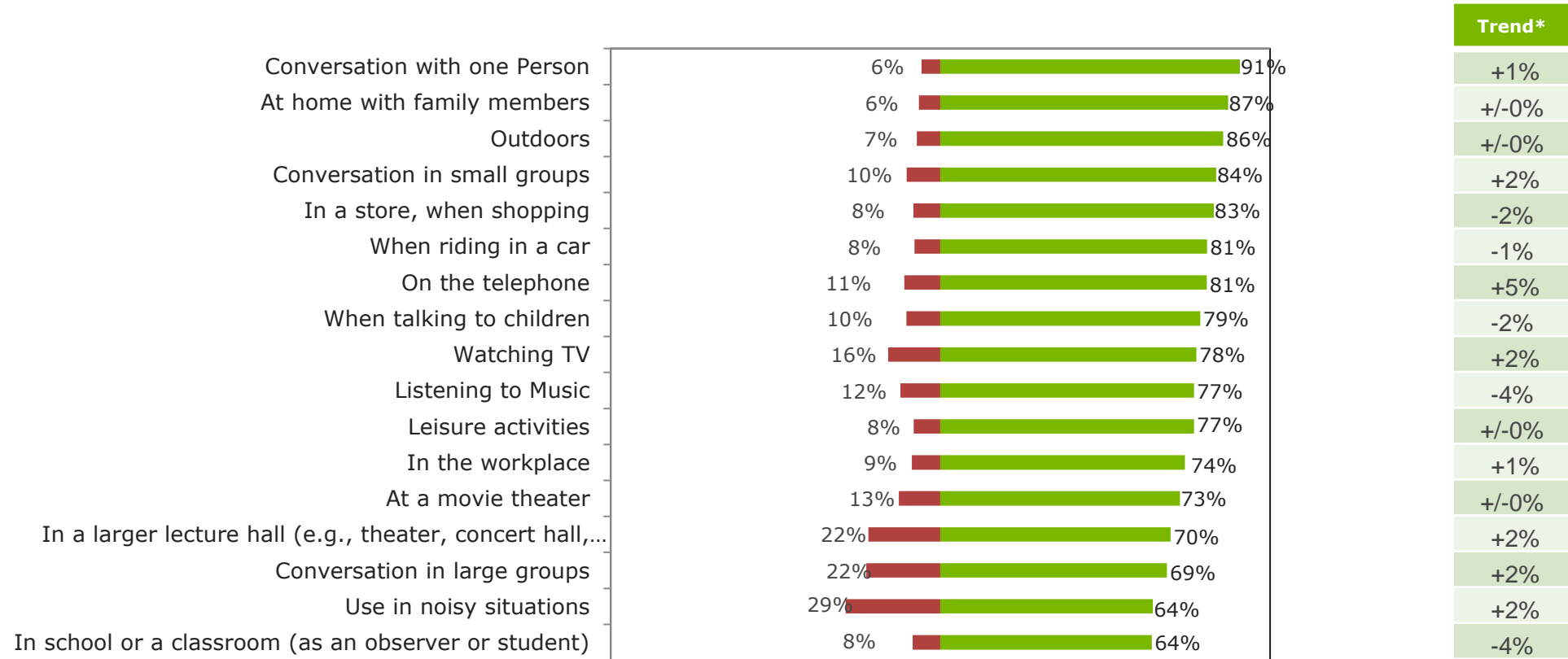
■ dissatisfied ■ satisfied

HA-owner, n=799



Satisfaction with current hearing aids

Listening situations



%dissatisfied= % very dissatisfied + % dissatisfied + % somewhat dissatisfied
%satisfied= % somewhat satisfied + % satisfied + % very satisfied

■ dissatisfied ■ satisfied

*% of satisfied HA owners compared to 2018

HA-owner, n=799



Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA

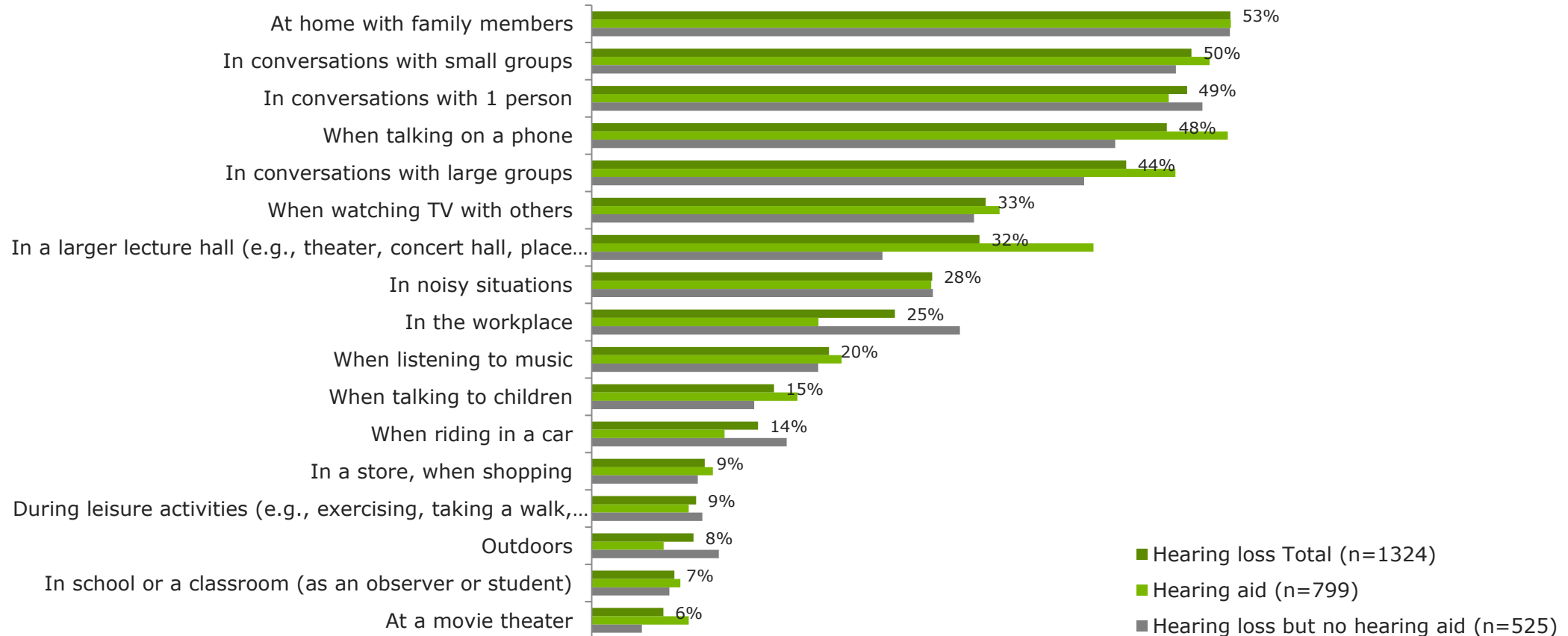
Influence on overall satisfaction with HA*

HA dispenser / Audiologist	Quality of service during hearing aid fitting period	0.39
	Quality of HA dispensers / Audiologists counseling	0.37
	Quality of service after purchase	0.35
	Professionalism of Hearing aid dispenser / Audiologist	0.35
Sound quality signal processing	Clearness of tone and sound	0.68
	Richness or fidelity of sound	0.66
	Natural sounding	0.62
	Comfort with loud sounds	0.57
Product features	Overall fit/ Comfort	0.58
	Managing whistling/feedback/buzzing	0.57
	Reliability	0.57
	Value (performance versus money spent)	0.52
	Visibility to others	0.48
	Battery life	0.40
	Ease of changing battery	0.38

*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction, 1 means a maximal relationship.

Important listening situations

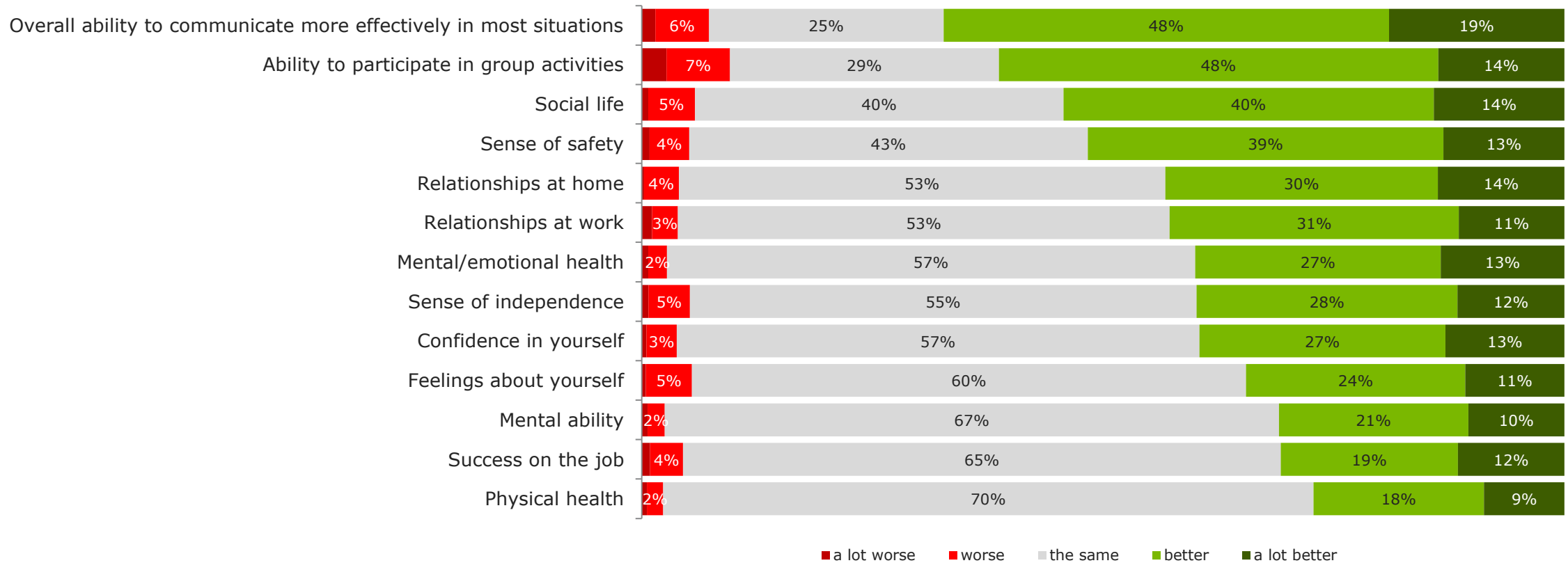
In which of these situations is it most important for you to hear well?
(choose up to 5)



Positive impact of hearing aids, quality of life

Significant positive impact of HAs on different aspects: Especially the ability to communicate, participate in group activities, social life, and sense of safety improved

Since you started using your hearing aid(s), please rate the changes you have experienced in each of the following areas, that you believe are due to your hearing aid(s).

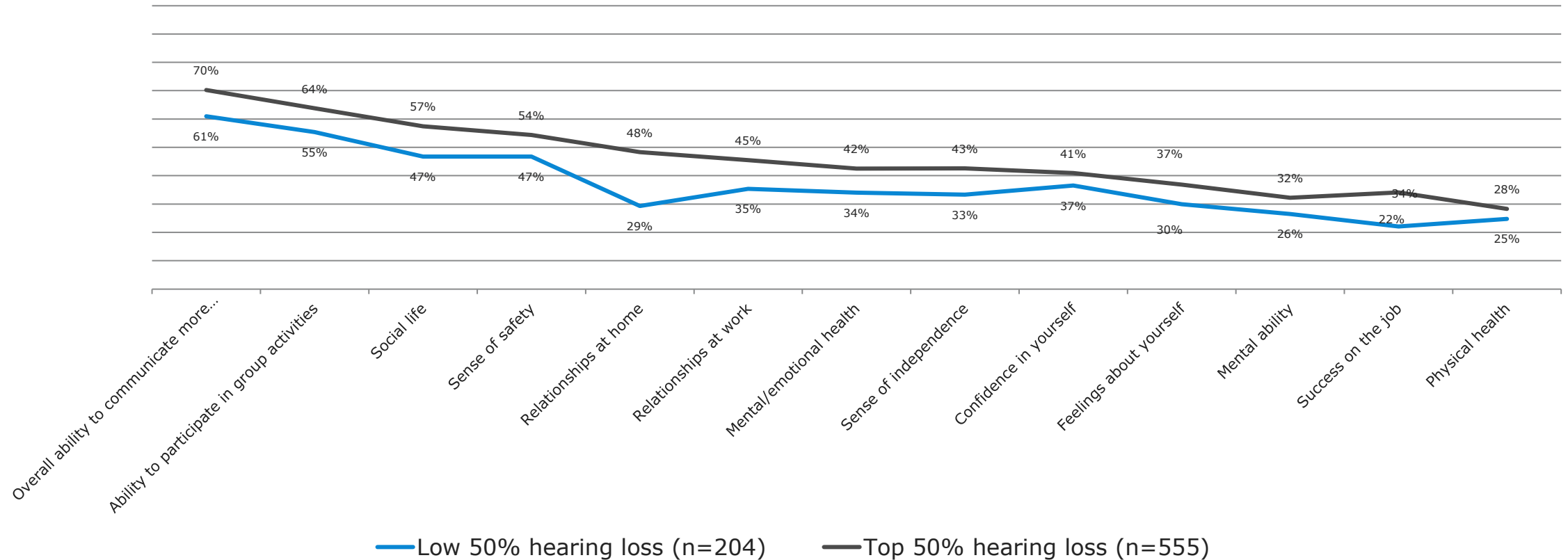


HA-owner, n=799



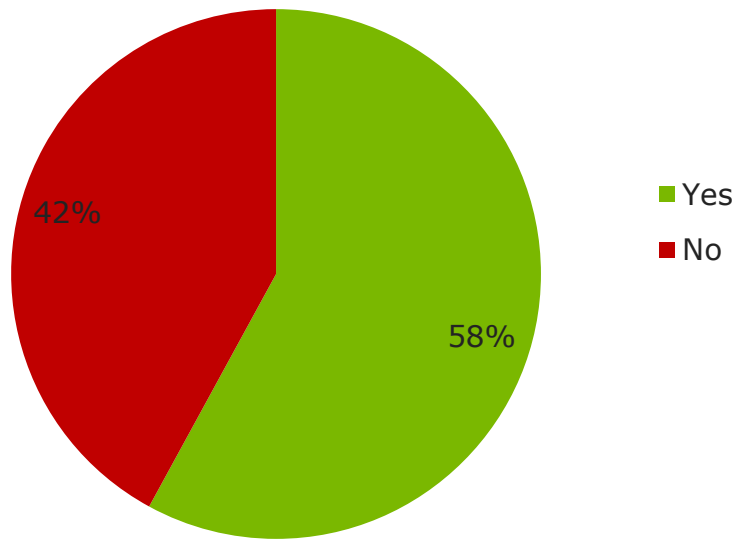
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA owners feeling better/a lot better



58% of hearing aid owners feel more confident moving in a city since wearing hearing aids.

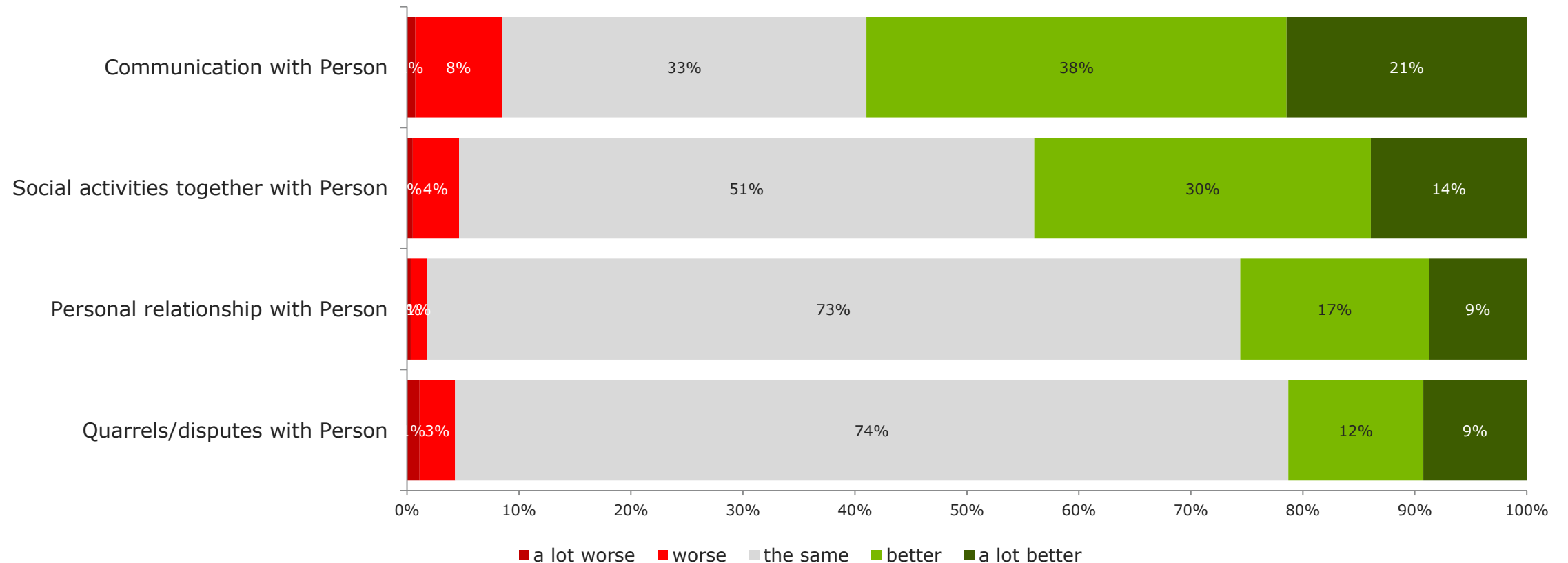
Since wearing a hearing aid, do you feel more confident moving in a city, e.g. because you hear traffic signals/vehicles approaching?



n=799

Also for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids

How did the following aspects change since person X is wearing hearing aids?

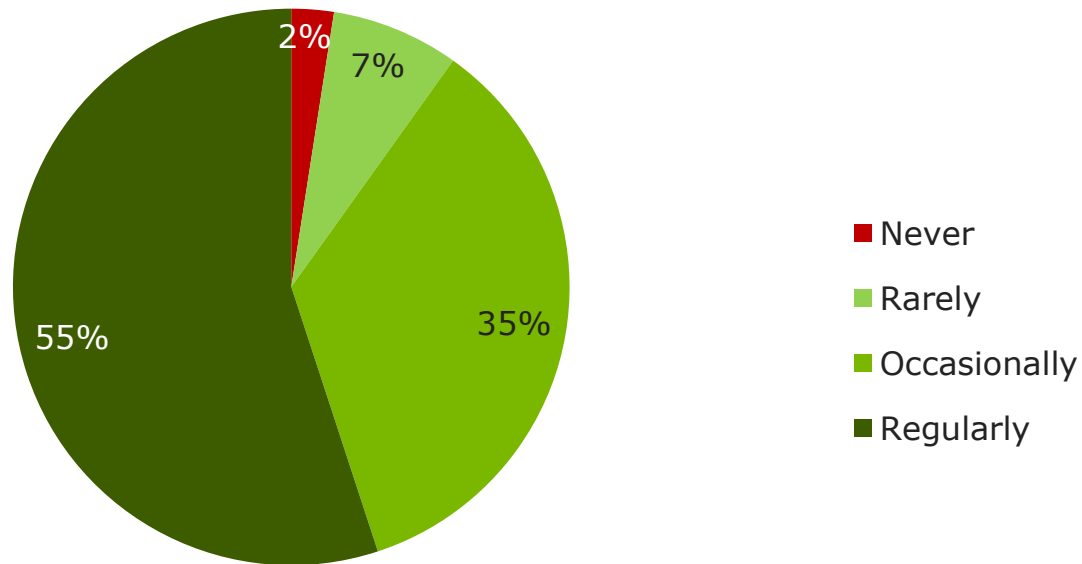


Someone in HH / parent has HA, n=524



98% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

How often do your hearing aids improve your quality of life?



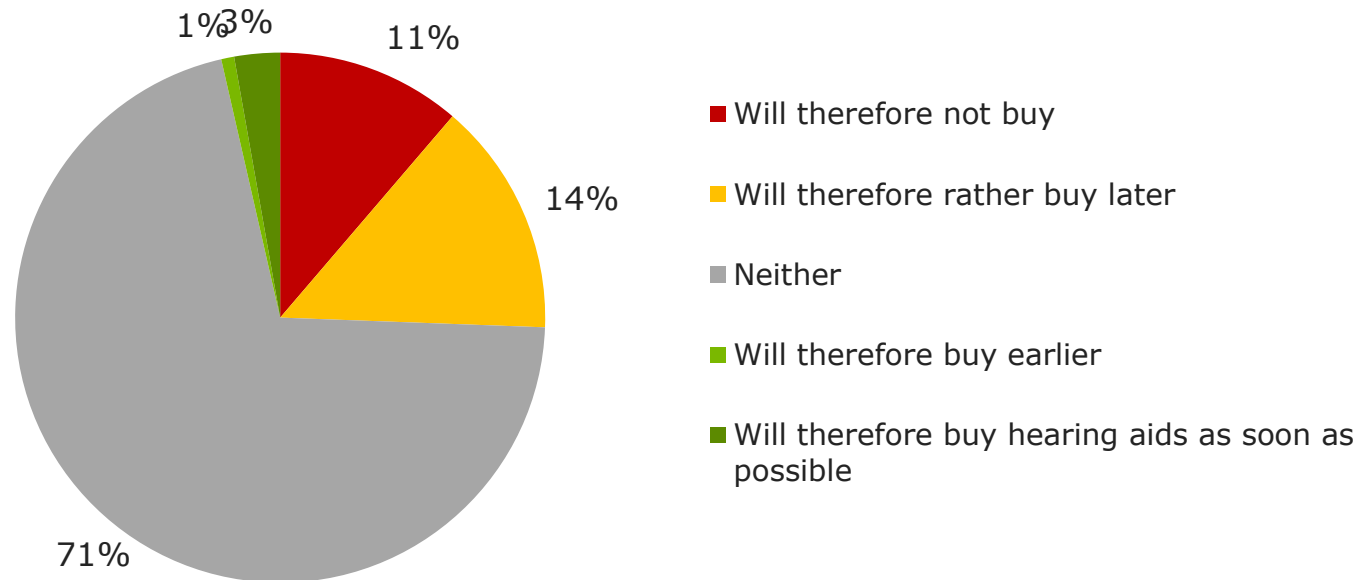
n=799

4. Analysis of hearing impaired non-owners

The current situation seems to have a negative influence on buying hearing aids

Currently, you read and hear a lot about the generally uncertain economic development, about expected changes in delivery times and prices, but also about the Ukraine war.

To what extent does this current situation influence you to purchase (new) hearing aids in the next 24 months?



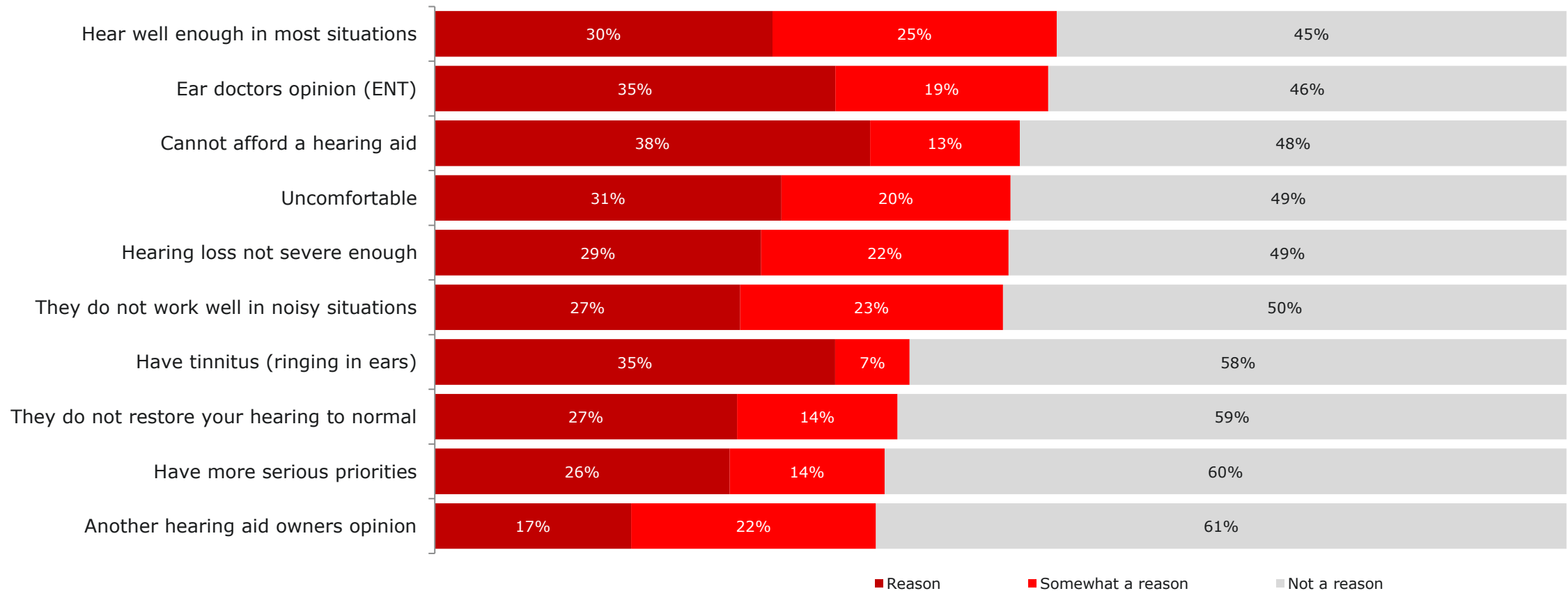
n=435 no HA

To analyse reasons of non-adoption we look at the Top 50% HL group, as the structure of hearing loss is more similar to that of HA owners

Hearing loss characteristics: Owners compared to non-owners

	HA Owner n=799	HA-Non-owner Low 50% HL n=327	Non-owner Top 50% HL n=126
Ears impaired (stated)			
Unilateral loss	12%	41%	34%
Bilateral loss	88%	59%	66%
Perceived loss			
		← More similar hearing loss-structure →	
Mild	11%	53%	10%
Moderate	51%	43%	61%
Severe	29%	2%	14%
Profound	8%	1%	16%

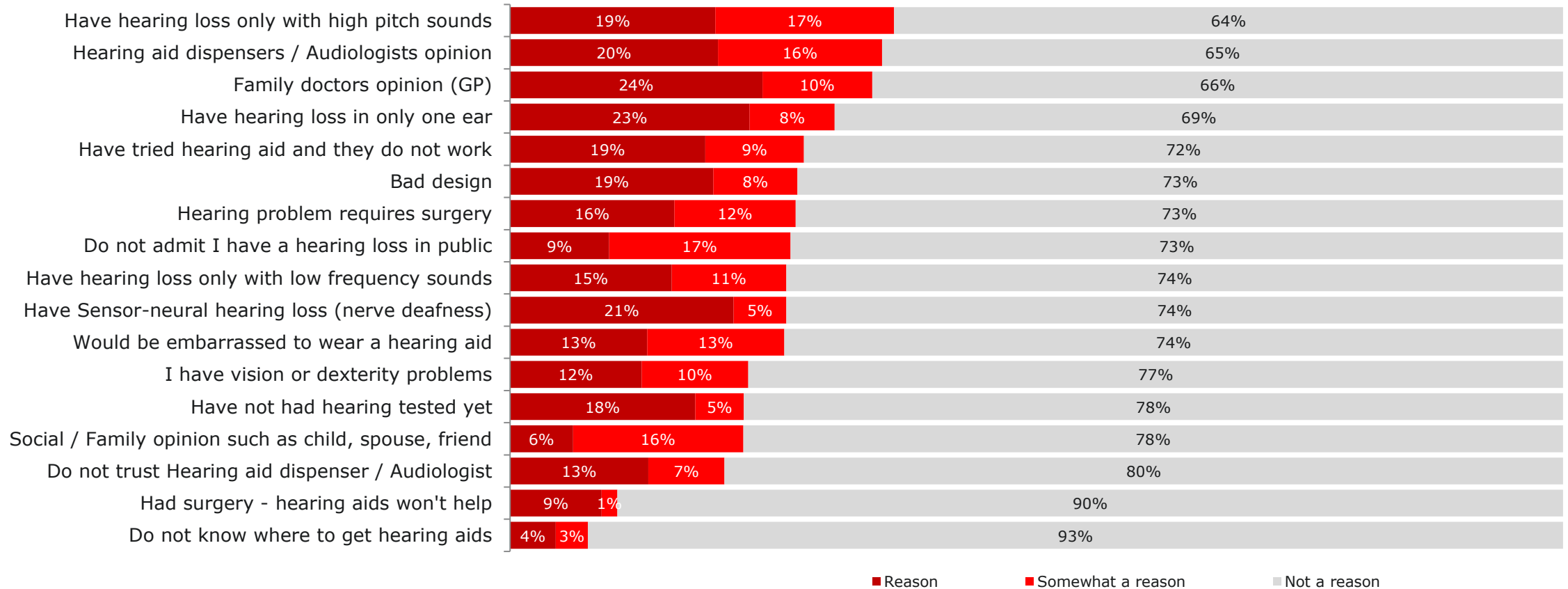
Top 10 reasons for not having a hearing aid (I/II)



Base: non owners Top 50% HL: n=126



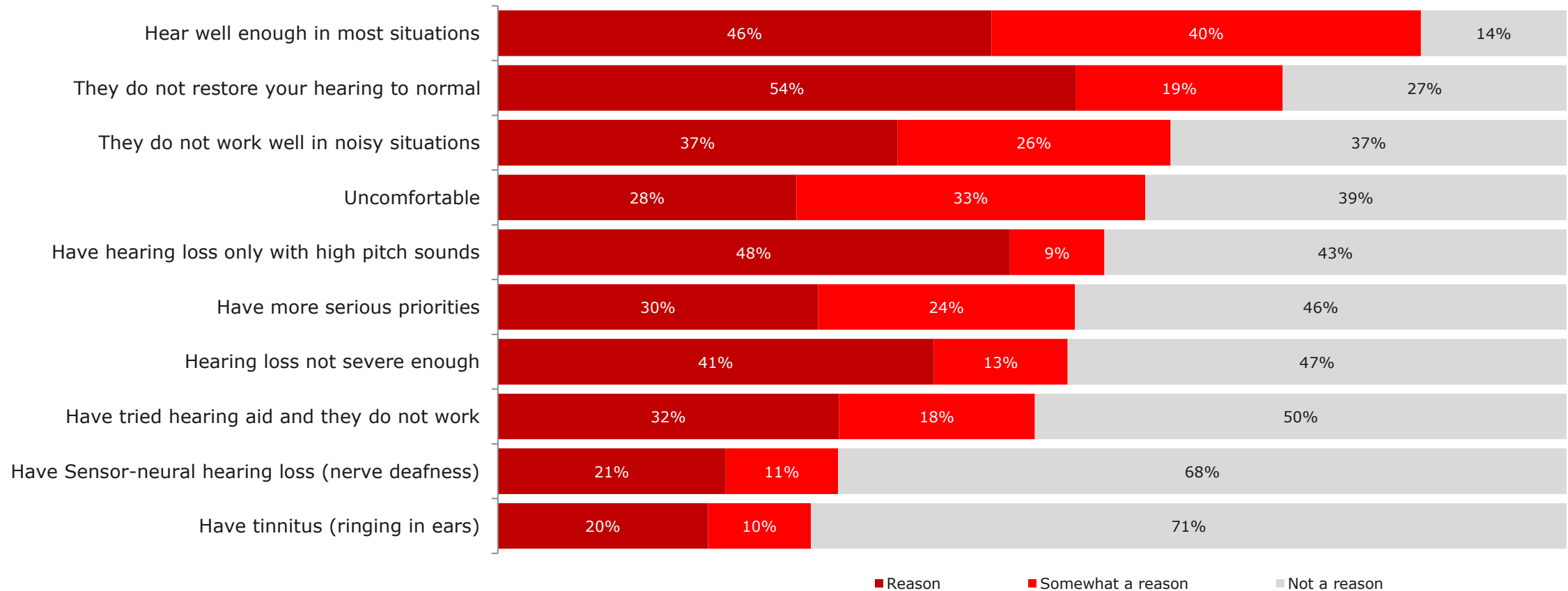
Less important reasons for not having a hearing aid (II/II)



Base: non owners Top 50% HL: n=126



Top 10 reasons for HA owners NOT using them



Owners who don't use, n=33 (low sample!)

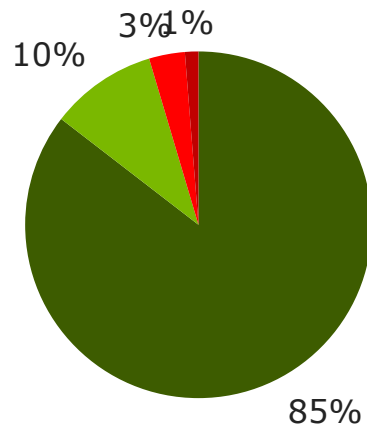


Social rejection because of hearing loss compared to the acceptance of hearing aids

85% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

Hearing aid owners:

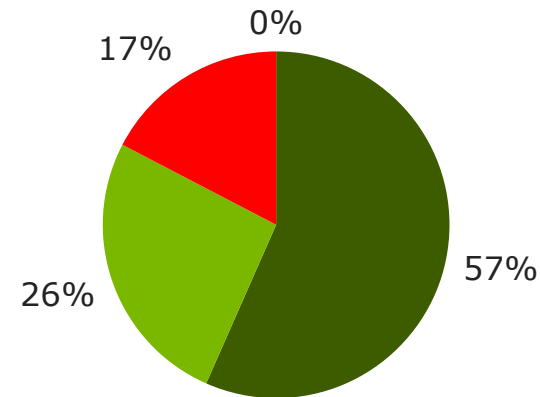
How often do you feel you are made fun of or rejected because you are wearing a hearing aid?



n=799

Hearing impaired non-owners:

How often do you feel you are made fun of or rejected because your hearing loss?



Base: Top 50% hearing loss, no hearing aid n=126

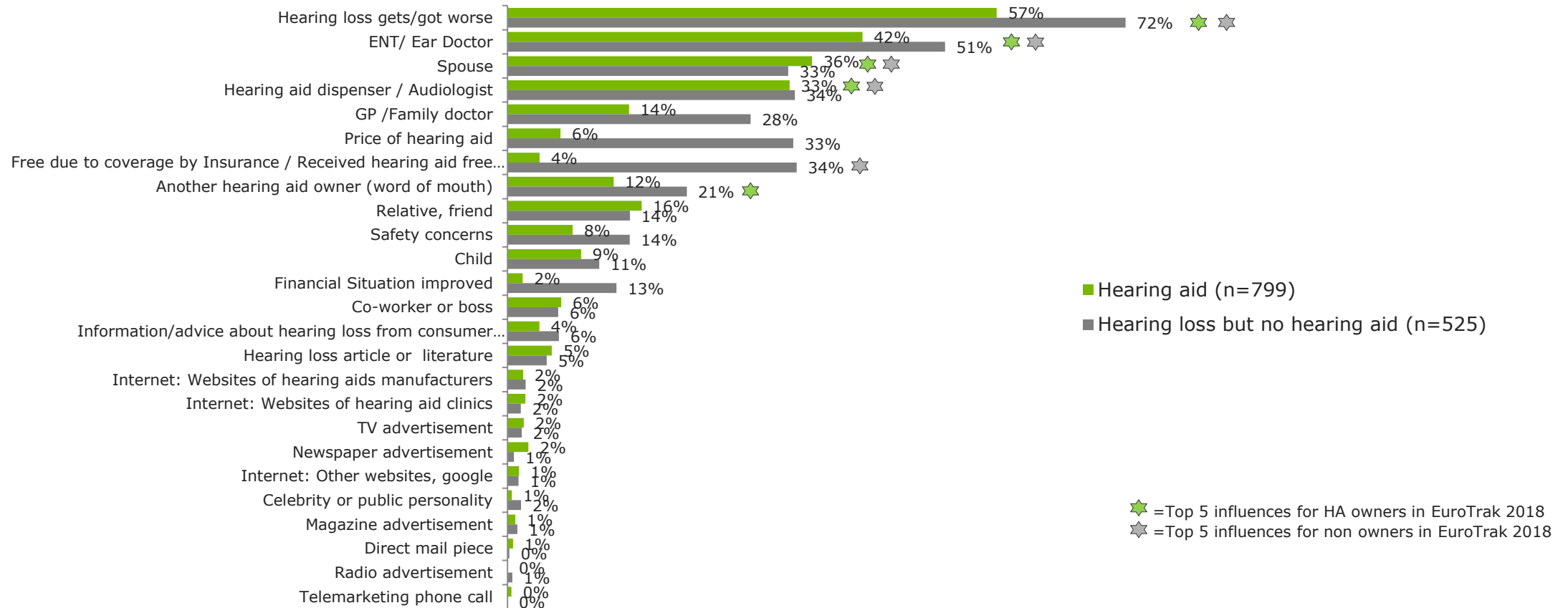


Most important triggers to buy

The most important influencing factors for getting hearing aids are worsening hearing loss, ENT, Spouse, and HA dispensers (+price / insurance coverage for the non owners).

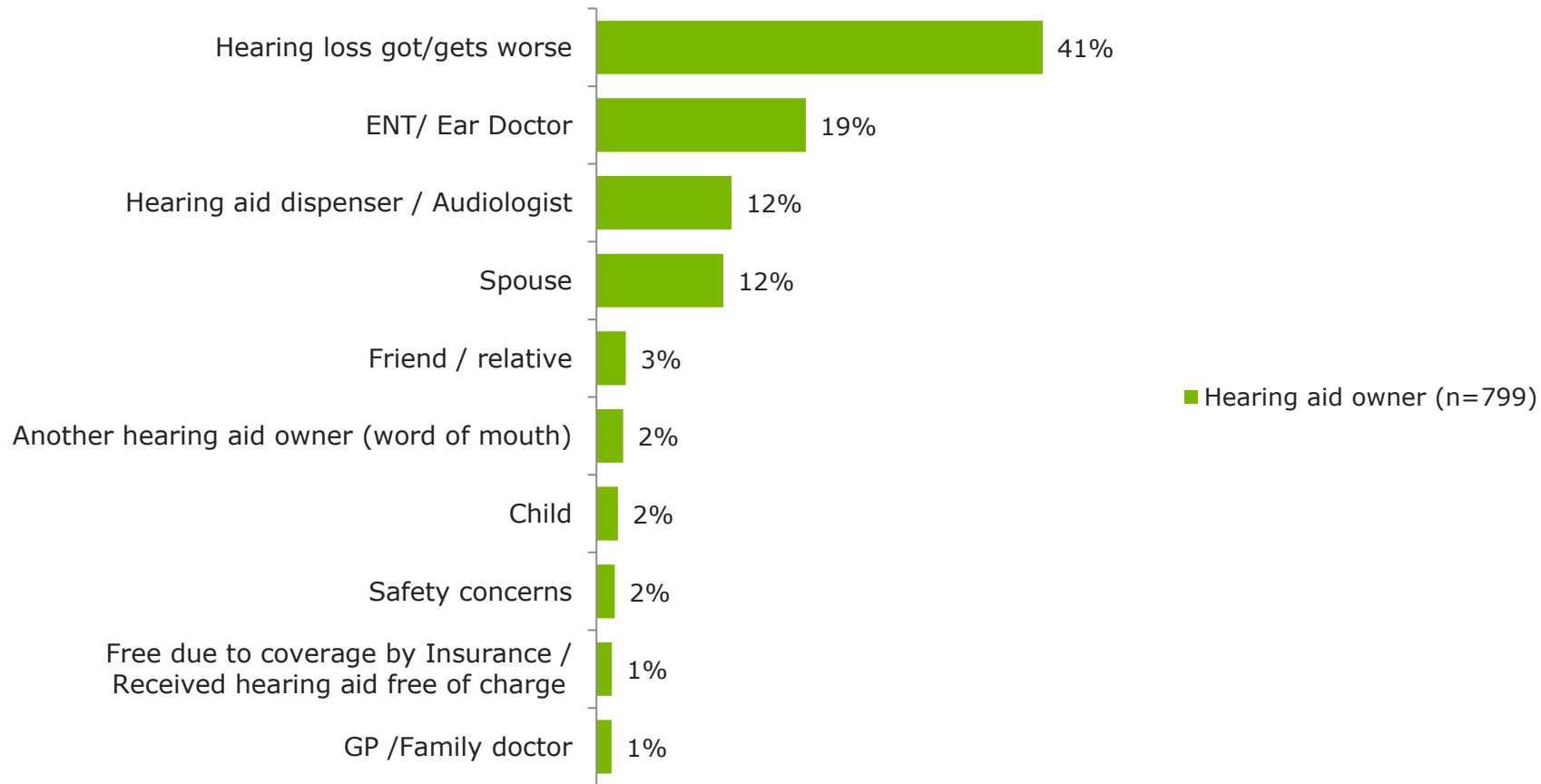
Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?

Non-owner: What do you think would influence you to obtain / purchase a hearing aid ?



The most important trigger to buy a hearing aid is worsening hearing loss, followed by ENT, Audiologist and spouse.

What made you finally decide to get your actual hearing aid(s)?






Stefan Ruf lic. rer. pol.

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Demographics (1) Hearing instrument adoption rates and populations

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=Hearing impaired)	No hearing loss	Hearing loss but no hearing aids	Hearing aids
Gender						
Male	7'315	8.4%	44.6%	49.1%	57.8%	54.8%
Female	7'420	6.4%	47.7%	50.9%	42.2%	45.2%
Age						
1 - 14	2'225	0.7%	29.9%	16.2%	1.8%	0.9%
15 - 24	1'509	0.9%	42.9%	11.0%	1.3%	1.2%
25 - 34	1'994	2.9%	12.3%	14.2%	8.5%	1.4%
35 - 44	2'089	2.6%	38.9%	14.9%	5.8%	4.3%
45 - 54	2'091	5.3%	26.0%	14.5%	14.0%	5.8%
55 - 64	2'026	9.0%	30.0%	13.5%	21.8%	11.0%
65 - 74	1'423	16.6%	47.9%	8.7%	21.0%	22.7%
74+	1'378	30.1%	63.4%	7.1%	25.9%	52.7%
Type of household						
single household	1'732	13.5%	53.9%	11.0%	18.4%	25.3%
Couple, no kids	4'369	11.7%	48.9%	28.3%	44.4%	50.0%
Couple with kid(s)	6'789	3.2%	31.0%	48.2%	25.2%	13.3%
Single mom/dad with kid(s)	627	2.6%	40.3%	4.5%	1.7%	1.3%
Retirement home, hospital etc.	115	32.9%	61.2%	0.6%	2.5%	4.6%
Other	1'103	6.7%	37.3%	7.5%	7.9%	5.5%

Demographics (2) Hearing instrument adoption rates and populations

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=Hearing impaired)	No hearing loss	Hearingloss but no hearing aids	Hearing aids
Status						
The head of the household (alone or together with someone)	7'542	10.6%	46.9%	49.4%	72.4%	75.3%
The spouse of the head of the household	2'593	7.5%	45.1%	17.6%	18.2%	17.6%
Daughter/son of head of household	3'704	0.6%	8.6%	27.0%	3.5%	0.4%
Other person	897	7.5%	49.4%	6.1%	5.8%	6.7%
Employment						
Full time employed	4'640	4.8%	30.3%	39.0%	27.0%	13.7%
Part time employed	2'878	5.0%	28.4%	24.1%	18.0%	8.3%
Unemployed / not working	543	4.8%	32.6%	4.6%	3.1%	1.7%
Retired under a disability pension scheme (fully or partly)	232	6.9%	47.0%	1.9%	1.5%	1.5%
Early retired under an early retirement benefit scheme	556	16.0%	57.2%	4.1%	6.6%	10.3%
Retired (at the official retirement age)	2'363	23.5%	57.3%	16.0%	41.2%	64.4%
Student / pupil / in training	1'184	1.3%	0.0%	10.3%	2.7%	0.0%
Education						
Primarschule	399	21.4%	48.5%	2.8%	7.6%	8.4%
Sekundarschule	821	12.3%	53.1%	6.4%	8.2%	10.8%
Berufsschule	4'286	9.4%	44.9%	34.3%	38.5%	36.6%
Mittelschule	1'248	7.3%	42.7%	10.2%	9.0%	7.9%
Seminar, Technikum, HWV	1'229	11.5%	51.8%	9.6%	11.8%	14.9%
Universität, ETH, Hochschule	3'757	5.6%	41.9%	31.3%	21.2%	17.8%

Sample size and random sample error: Rules of thumb

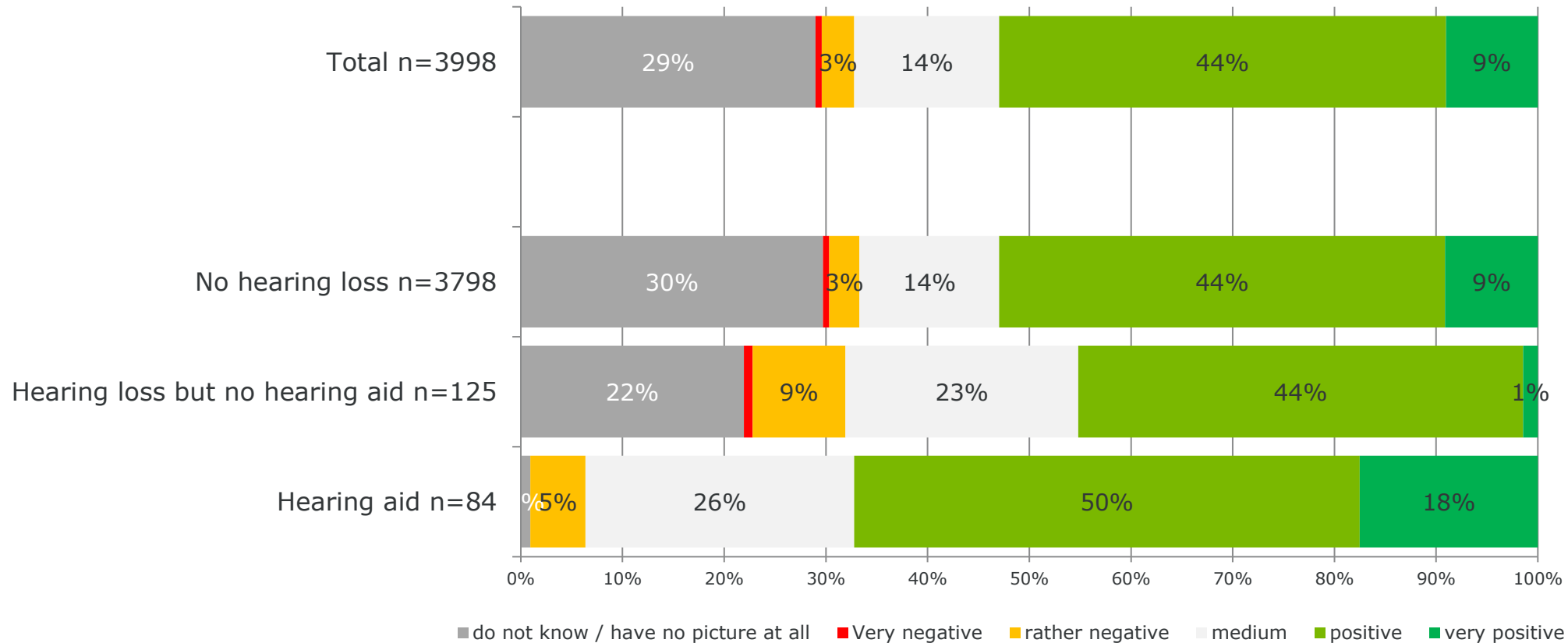
READ: At a sample size of $n=500$ and a value of 15% we would expect the real value in an interval ± 3.1 around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

Sample size	Random sample error	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
	Real value is within interval:	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
50	± 13.9	± 9.9
100	± 9.8	± 7.0
250	± 6.2	± 4.4
500	± 4.4	± 3.1
1'000	± 3.1	± 2.2
5'000	± 1.4	± 1.0
10'000	± 1.0	± 0.7

5. Switzerland-specific questions

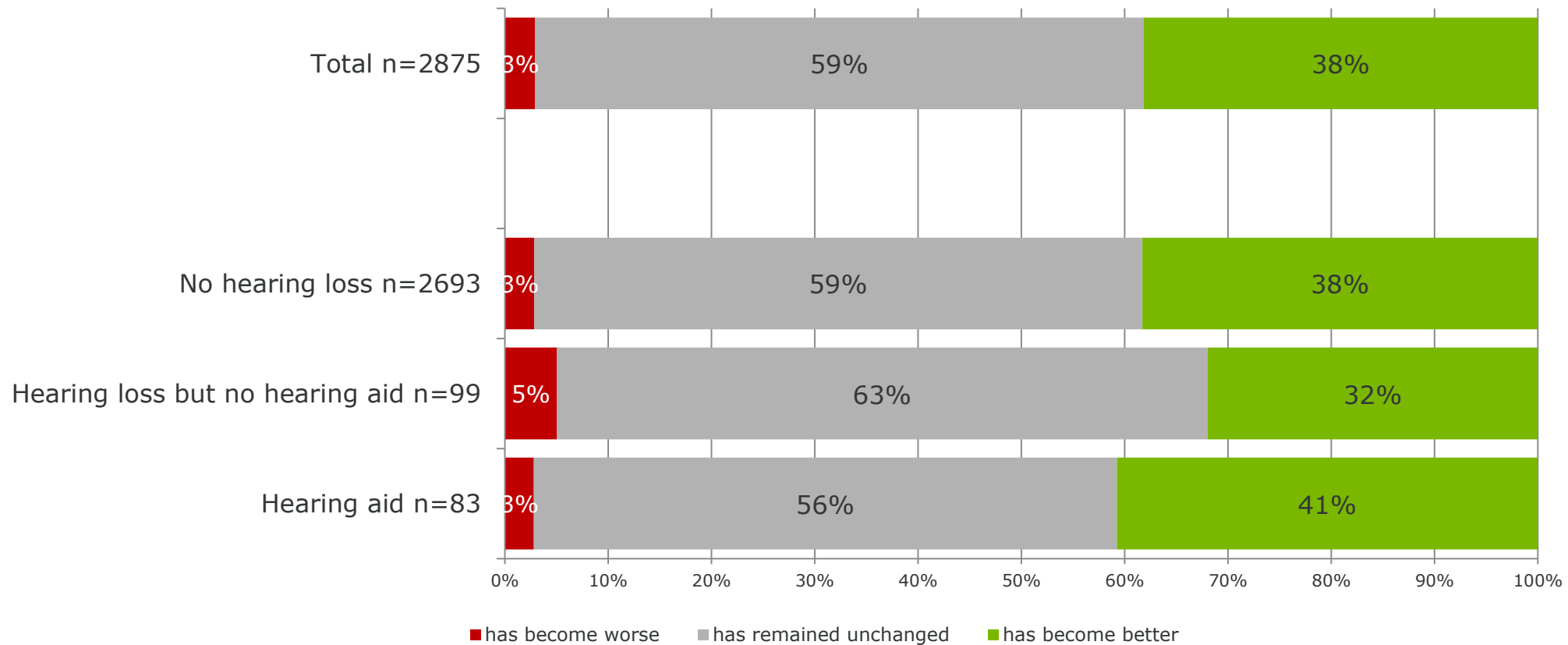
Only 3% of the people in Switzerland have a negative image of the hearing healthcare industry

What is your general impression of the hearing aid industry in Switzerland? Is this...



38% state that the overall image of the hearing healthcare industry in Switzerland got better

How has your image of the hearing aid industry in Switzerland changed in recent years?

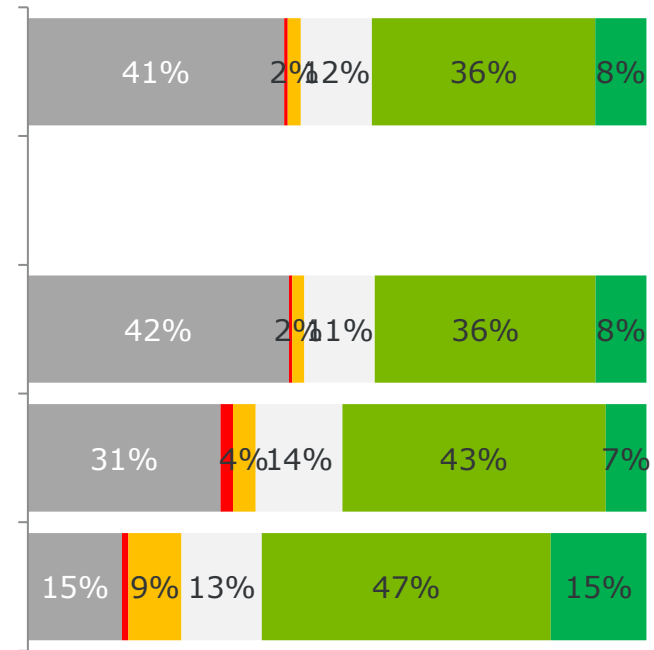
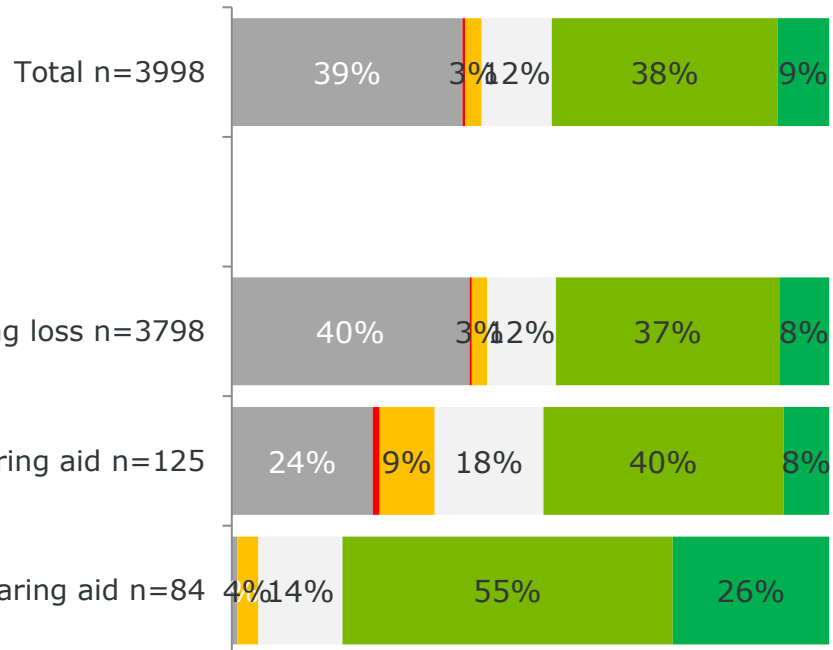


The image of Audiologists is similar to the image of the manufacturers (Among HA owners, Audiologists' image is better than manufacturers')

Image

Audiologists / HA dispenser

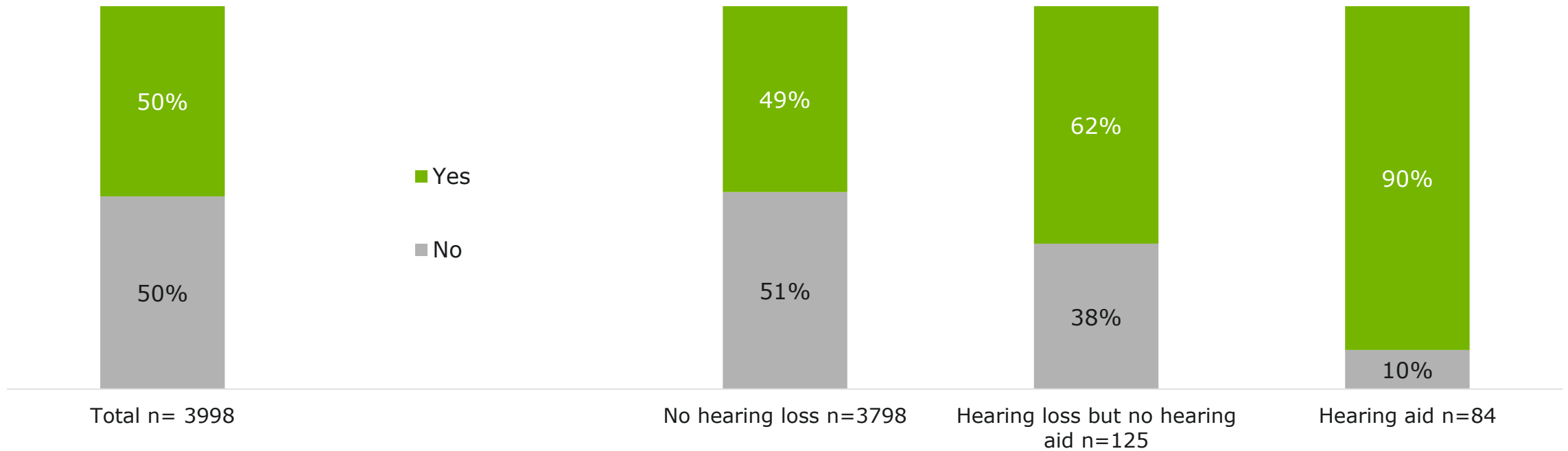
Hearing aid manufacturers



- do not know / have no picture at all
- rather negative
- positive
- Very negative
- medium
- very positive

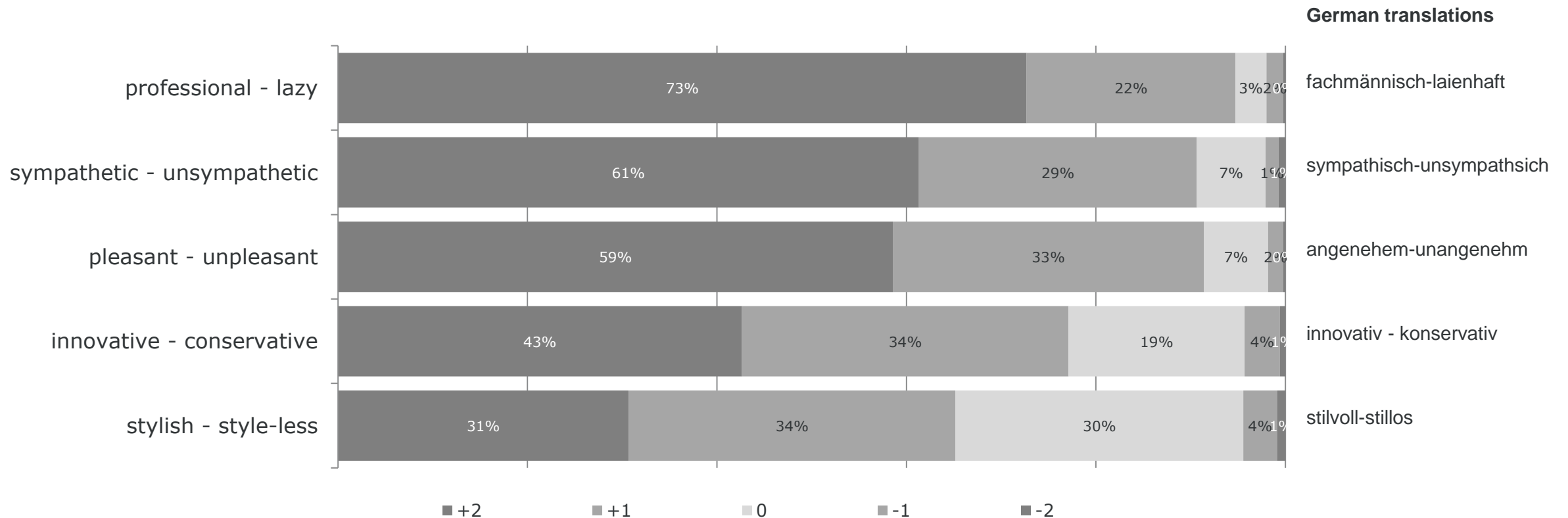


50% of the population is not aware of the distinction between audiologists and hearing aid manufacturers



Characteristics of HCPs are considered positive, especially professional and sympathetic

Below are 5 pairs of attributes. Please enter in each case how you perceived your hearing care professional.



n=799 hearing aid owers

