



Summary

EuroTrak France 2009

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

Summary

1. Introduction

- EuroTrak France 2009 was designed and executed by Anovum (Zürich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).
- Sample sizes France 2009:
 - Total representative sample: n=15'545 people
 - Total hearing impaired: n=1'304 people
 - Hearing impaired non-owners: n=803 people with hearing loss (**HL**)
 - HA owners: n=501 people with hearing aid (**HA**)
- EuroTrak France 2009 is part of the EuroTrak studies in three countries: Germany, France, United Kingdom.
- The results have been reviewed by Sergei Kochkin, Ph.D., Executive Director, Better Hearing Institute.



Summary

2. Market overview

- Stated hearing loss prevalence
 - Age groups 18+: 12.7%.
 - Total: 10.4%.
 - Binaural hearing loss: HA owners: 71%, HA non-owners: 61%.
- Hearing aid adoption rate (HA penetration)
 - Total: 29.8%.
 - Total age group 18+: 29.3%.
 - 58% of HA owners have binaural treatment. Trend rising.
- The route to the hearing aid
 - 72 out of 100 hearing impaired discuss hearing loss with an ENT doctor or family doctor.

Summary

3. Analysis of hearing aid owners

- Hearing aid ownership and usage
 - 52% received some kind of 3rd party reimbursement.
 - 68% of the currently owned HAs were bought in 2007 or later.
 - The average age of the currently owned HAs is 2.9 years
 - On average, HAs are worn 8.3 hours a day.
 - 74% of the currently owned HAs either had no service need or only once (54% "no" + 20% "once").
- Satisfaction with HAs
 - 86% of the HA owners are satisfied with their HAs (16% "somewhat satisfied" + 54% "satisfied" + 16% "very satisfied").
 - The more hours worn per day, the higher the satisfaction.
 - Satisfaction with HAs bought after 2007 is higher than with HAs bought before.
 - Satisfaction with dispenser is generally very high (85%-91%).
 - Still challenges for the future are:
 - Hearing situations: Use in noisy situations, on the telephone and conversations in large groups.
 - Product features: Value (performance vs. money spent) and battery life.
- Positive impact of HAs
 - Significant positive impact of HAs on different aspects – especially communication effectiveness and social life.



Summary

4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
 - Information deficit non-owners: 26% don't know whether insurance would pay, 31% assume they won't pay.
 - The main reasons for not using hearing aids are that people say they can't afford a hearing aid, they are uncomfortable and they argue hearing aids don't restore hearing to normal.
 - 6% who own HAs don't use them. Main reasons for this are: "HAs do not restore hearing to normal", "uncomfortable" and "not good in noisy situations".
- "Negative non-owners" vs. "positive non-owners" opinion
 - Beliefs of "negative non-owners"
 - These people believe that HA are not adequate in everyday life.
 - They are inert and think they hear enough without hearing aids.
 - They say that hearing aids are not cheap.
 - Beliefs of "positive non-owners"
 - They do not fear any stigma and agree about the clear advantages of hearing aids.
 - Barriers to buy are: Costs/costs-performance, they hear enough and they believe that without HAs they only hear what they want to hear.
 - Positive non-owners clearly prefer ITEs compared to BTEs as they believe only these devices are invisible.
- Negative impact of hearing loss and buying intentions
 - Hearing impaired non-owners tend to feel less sound and safe and participate less in social activity compared to satisfied hearing aid-owners. Non-owners are more passive.
 - 10% of non-owners intend to buy a hearing aid within the next year.
 - What non-owners say would influence them to buy is not necessarily what owners say influenced them to buy. The most important influencing factors for owners were a worse hearing loss, the ENT and the audiologist as well as spouse/relatives/child/friend.





Results

EuroTrak France 2009

Detailed Results: Roadmap

1. Introduction

- Objectives and organisation
- Field research specification
 - Outline of the questionnaire
 - Recruitment process
 - Representativeness

2. Market overview

- Prevalence of hearing loss and hearing aid adoption rate
- Demographics of hearing aid owners and non-owners

3. Analysis of hearing aid owners

- Owners: Degree of hearing loss
- Owners: Drivers of commitment
- Hearing aid ownership and usage
- Satisfaction with HA and drivers
- Positive impact of hearing aids

4. Analysis of hearing impaired non-owners

- Non owners: Degree of hearing loss
- Non owners: Drivers of openness
- Reasons not to own hearing aids
- Negative impact of hearing loss
- Acquiring intentions



1. Introduction

Organisation of EuroTrak 2009

Organisation

- Principal of the project EuroTrak is the European Hearing Instrument Manufacturers Association [EHIMA]. Members of EHIMA are: GN Resound, Oticon, Phonak, Siemens, Starkey and Widex [EHIMA Companies].
- Anovum Zürich developed the concept of EuroTrak, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore Anovum analysed the data and prepared the presentation.
- EHIMA approved the questionnaire in cooperation with Sergei Kochkin, Ph.D., Executive Director, Better Hearing Institute.
- For some analysis Anovum applied a specific technique to analyse the data that initially was developed for Brand Equity research ("Anovum Commitment Model / Share of Wallet Predictor")

Use of the data

- The principal as well as the EHIMA companies 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 or the EHIMA companies use 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 – France/2009/n=[relevant sample size]"
- The principal and EHIMA companies can ask Anovum to further analyse the raw data in specific ways at their own expense.



Field research specification



Outline of the questionnaire

	HA owners	HA non-owners
INTERVIEW INTRODUCTION	X	X
SCREENER QUOTA DEMOGRAPHICS	X	X
SCREENER HEARING LOSS -> SELECTION INTERVIEWEE	X	X
DEGREE OF HL AND BINAURAL TREATMENT/ DETAILED HEARING LOSS	X	X
GENERAL ATTITUDES	X	X
FACTORS DRIVING AND UNDERMINING COMMITMENT TOWARD THE OPTIONS HOW TO LIVE WITH HEARING LOSS	X	X
HEARING AID OWNED AND USED	X	
SATISFACTION CURRENT HEARING AID	X	
POSITIVE IMPACTS OF HEARING AIDS	X	
REASONS NOT TO USE HA		X
NEGATIVE IMPACTS OF HL	X	X
TRIAL AND BUYING INTENTIONS	X	X
SOCIODEMOGRAPHICS	X	X



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 a panellist pool of more than 100'000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=15'545** 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=501** hearing aid owners and **n=803** hearing impaired non-owners



In search of hearing impaired people

- **Step 1:** Structure of total representative screening interviews sample (weighted) : n=15545 people

		Sex					
		Masculin		Féminin		Total	
		Count	Column Valid N %	Count	Column Valid N %	Count	Column Valid N %
Alter recodiert	bis 14	1458	19.4%	1391	17.4%	2849	18.3%
	15 - 24	983	13.1%	954	11.9%	1937	12.5%
	25 - 34	958	12.7%	967	12.1%	1925	12.4%
	35 - 44	1067	14.2%	1083	13.5%	2150	13.8%
	45 - 54	1033	13.7%	1078	13.4%	2111	13.6%
	55 - 64	951	12.6%	1005	12.5%	1956	12.6%
	65 - 74	570	7.6%	659	8.2%	1229	7.9%
	74+	509	6.8%	878	10.9%	1387	8.9%
	Total	7529	100.0%	8016	100.0%	15545	100.0%

Establish prevalence of hearing loss and hearing aid ownership

- **Step2:** Structure of hearing impaired sample (weighted*): n=1304 people

		Gender					
		Male		Female		Total	
		Count	Column Valid N %	Count	Column Valid N %	Count	Column Valid N %
Alter recodiert	bis 14	19	2.7%	29	4.9%	48	3.7%
	15 - 24	42	5.8%	30	5.2%	72	5.5%
	25 - 34	55	7.6%	44	7.5%	99	7.6%
	35 - 44	65	9.0%	46	7.9%	111	8.5%
	45 - 54	117	16.3%	64	11.0%	181	13.9%
	55 - 64	151	21.1%	82	14.0%	233	17.9%
	65 - 74	124	17.2%	87	14.8%	210	16.1%
	74+	146	20.3%	203	34.7%	349	26.8%
	Total	719	100.0%	585	100.0%	1304	100.0%

Details about satisfaction with hearing aids (n=501 owner) and reasons for non-adoption (n=803 impaired non-owner)

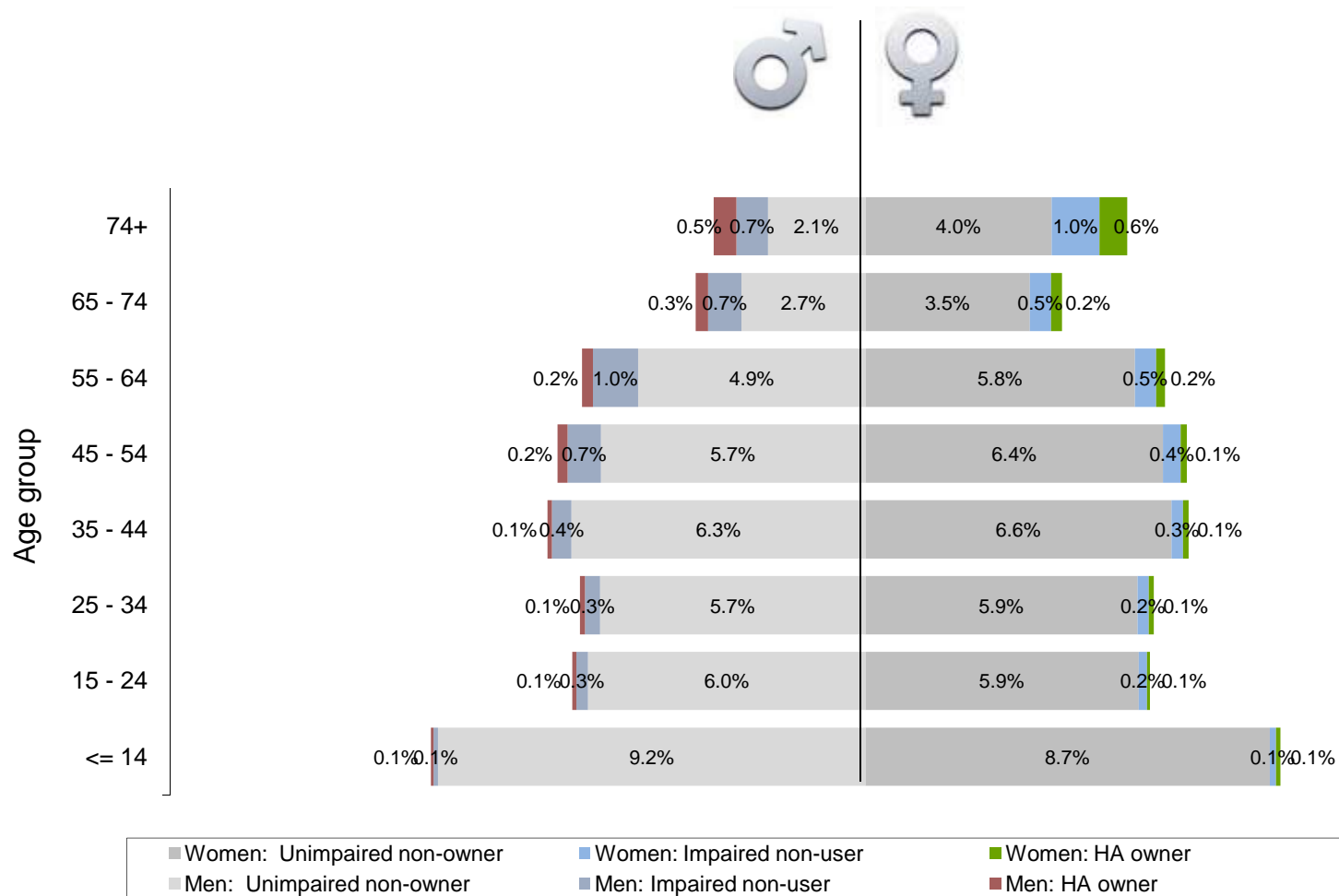


2. Market overview



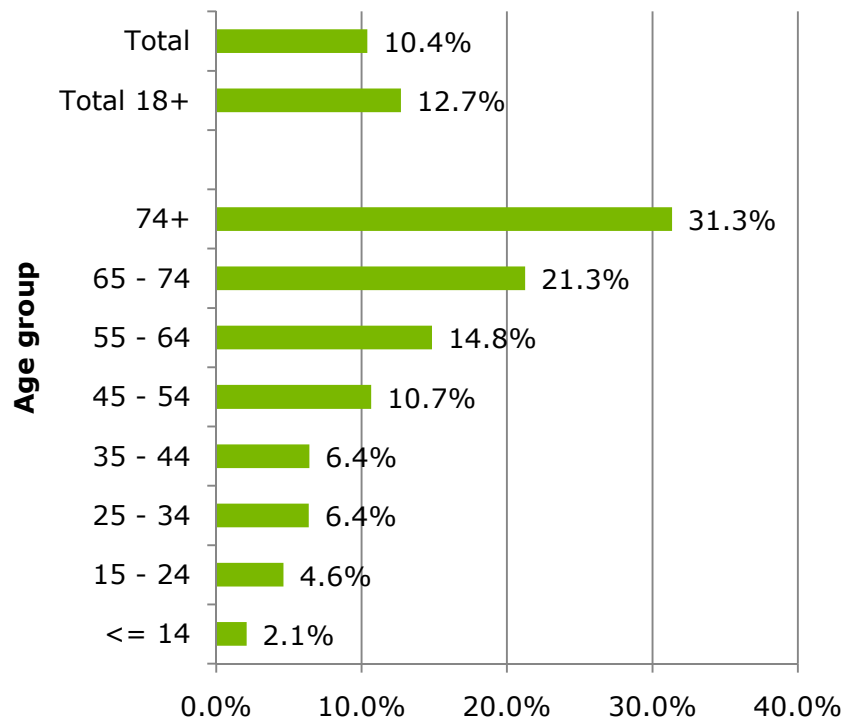
Prevalence of hearing loss and adoption rate

Hearing loss and hearing instrument ownership by gender/age (self-reported)

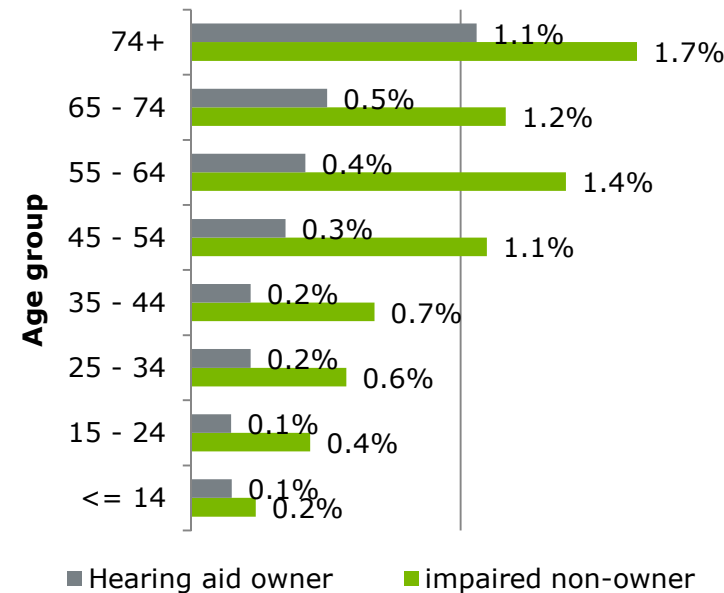


Hearing loss prevalence France 2009 (self-reported)

% Hearing loss prevalence
(Base=population / n=15545)

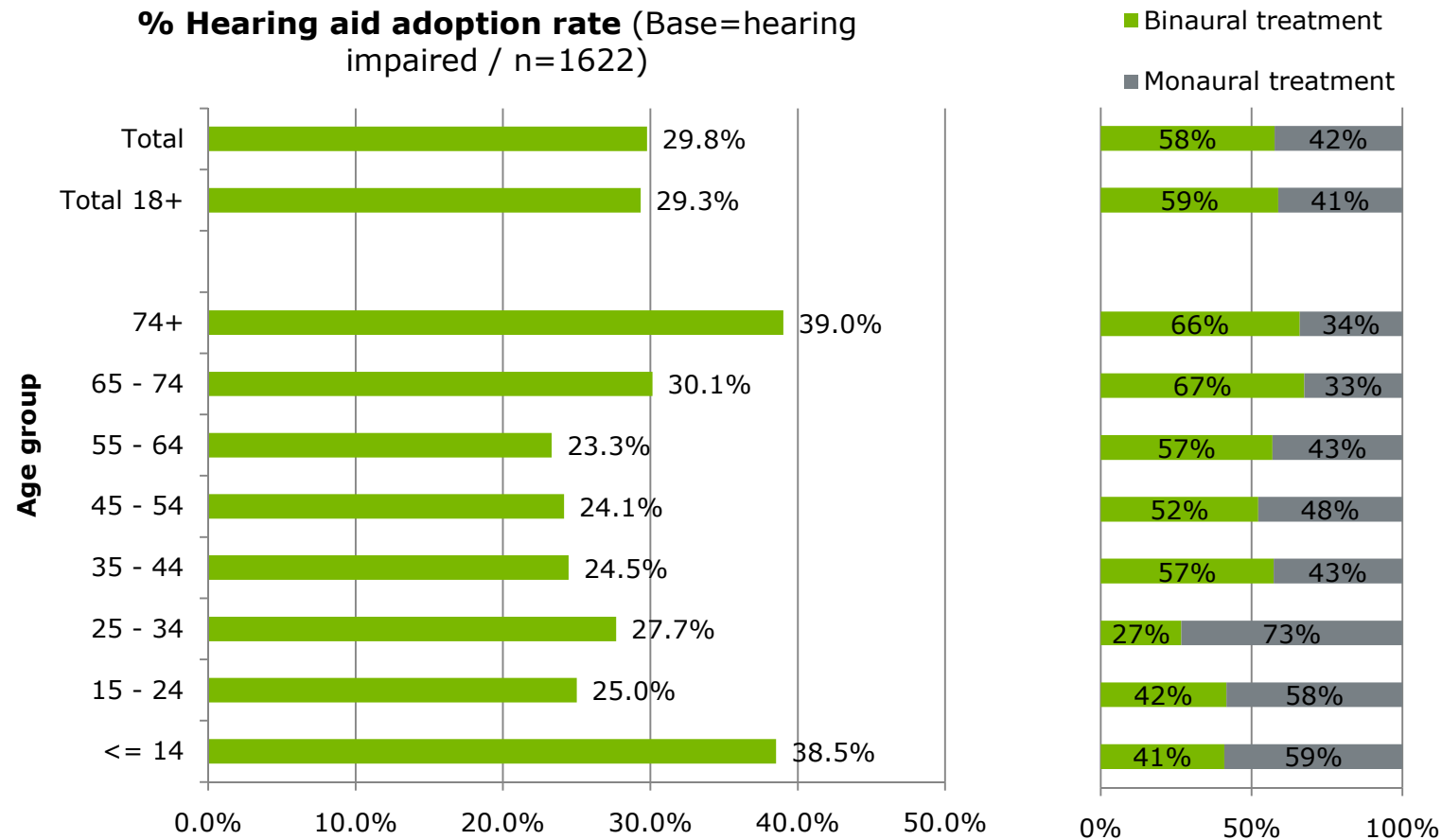


Hearing loss population: Owner/non-owner
(Base=hearing impaired / all figures sum up to 10.4% / n=1622)



Hearing aid adoption rate France 2009

Total adoption rate is 29.8%



Base: n=478 (HA owners)



Demographics of hearing aid owners and non-owners



Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	%HA-Non-owner (n=803)	% HA Owner (n=501)	Hearing Aid Adoption (%)	People with stated HL without HA*
Ears impaired				
Unilateral loss	39%	29%	25%	1'820'000
Bilateral loss	61%	71%	33%	2'850'000
Perceived loss				
Mild	26%	6%	9%	1'210'000
Moderate	50%	46%	28%	2'340'000
Severe	19%	36%	45%	890'000
Profound	5%	12%	51%	230'000

n's are unweighted whereas the shown results are weighted
 * projection



Demographics (1) Hearing instrument adoption rates and populations

Hearing impaired population n=1743

Category	Demographics	Total sample unweighted n	Hearing loss %	Hearing aid adoption rate % (Base=hearing impaired)	Hearing aid non owner (Categories add to 100%)	Hearing aid owner (Categories add to 100%)
Gender	Male	7534	12%	27%	57.2%	50.2%
	Female	8011	9%	33%	42.8%	49.8%
Age	<= 14	2082	2%	39%	3.2%	4.8%
	15 - 24	2069	5%	25%	5.9%	4.6%
	25 - 34	1530	6%	28%	7.8%	7.0%
	35 - 44	1787	6%	24%	9.2%	7.0%
	45 - 54	2630	11%	24%	15.0%	11.2%
	55 - 64	2824	15%	23%	19.5%	14.0%
	65 - 74	1339	21%	30%	16.1%	16.3%
	74+	1284	31%	39%	23.3%	35.1%
Inhabit	<= 10'000	6339	10%	27%	41.4%	35.7%
	> 10'000, <= 50'000	4081	10%	28%	27.2%	25.1%
	> 50'000, <= 500'000	3021	12%	37%	20.2%	27.8%
	> 500'000, <= 1 Mio.	706	12%	29%	5.3%	5.1%
	> 1 Mio.	698	14%	31%	5.8%	6.4%
HHsize	1 Person	1276	15%	35%	10.3%	12.8%
	2 Persons	4420	13%	25%	35.2%	27.6%
	3 Persons	3412	11%	29%	22.9%	22.0%
	4 Persons	3976	8%	33%	20.3%	24.0%
	5+ Persons	2452	7%	34%	11.3%	13.6%
Type	Single HH	1457	17%	31%	14.0%	15.1%
	Couple without kid(s)	4729	15%	31%	38.5%	40.0%
	Couple with kid(s)	7199	7%	27%	32.7%	29.2%
	Single mom/dad with kid(s)	891	6%	30%	3.4%	3.5%
	Retirement home, hospital etc.	125	37%	34%	2.9%	3.5%
	Other	1144	13%	30%	8.5%	8.7%



Owner: n=505
 Non-owner: n=1238



Demographics (2) Hearing instrument adoption rates and populations

Hearing impaired population n=1743

Category	Demographics	Total sample unweighted n	Hearing loss %	Hearing aid adoption rate % (Base=hearing impaired)	Hearing aid non owner (Categories add to 100%)	Hearing aid owner (Categories add to 100%)
Status	The head of the household (alone or together)	7235	16%	28%	66.0%	61.1%
	The spouse of the head of the household	4098	9%	33%	21.4%	25.2%
	Daughter/son of head of household	3587	2%	30%	6.5%	6.5%
	Other Person	623	16%	34%	6.1%	7.3%
Employment	Full time	9073	7%	27%	43.0%	38.4%
	Part time	818	8%	25%	4.5%	3.5%
	No job	1060	8%	22%	5.7%	3.8%
	Retired	4054	21%	33%	44.5%	52.9%
	Student	415	8%	20%	2.4%	1.5%
Education	Brevet	1457	15%	32%	12.4%	13.8%
	CAP-BEP	4293	9%	25%	26.8%	21.0%
	Baccalauréats	2827	8%	33%	14.8%	17.0%
	BTS - DUT	2183	8%	23%	12.7%	9.3%
	License (BAC+3)	1429	9%	33%	8.0%	9.3%
	Master 1 et 2 - Diplôme d'Ingénieur	1508	9%	29%	9.6%	9.4%
	Doctorat	350	14%	56%	1.9%	5.7%
	Autre	1351	17%	31%	13.8%	14.5%
HH Income	Under 10'000 Euro	993	11%	19%	8.2%	4.6%
	10,000 - 19,999 Euro	2481	10%	31%	16.6%	17.6%
	20,000 - 29,999 Euro	3417	11%	29%	26.0%	25.2%
	30,000 - 39,999 Euro	3305	9%	29%	21.6%	20.8%
	40,000 - 49,999 Euro	1829	11%	26%	14.0%	11.4%
	50,000 - 59,999 Euro	799	13%	34%	6.7%	8.0%
	60,000 - 79,999 Euro	700	11%	45%	4.3%	8.1%
> 80,000 Euro	341	14%	41%	2.7%	4.4%	



Owner: n=505
 Non-owner: n=1238

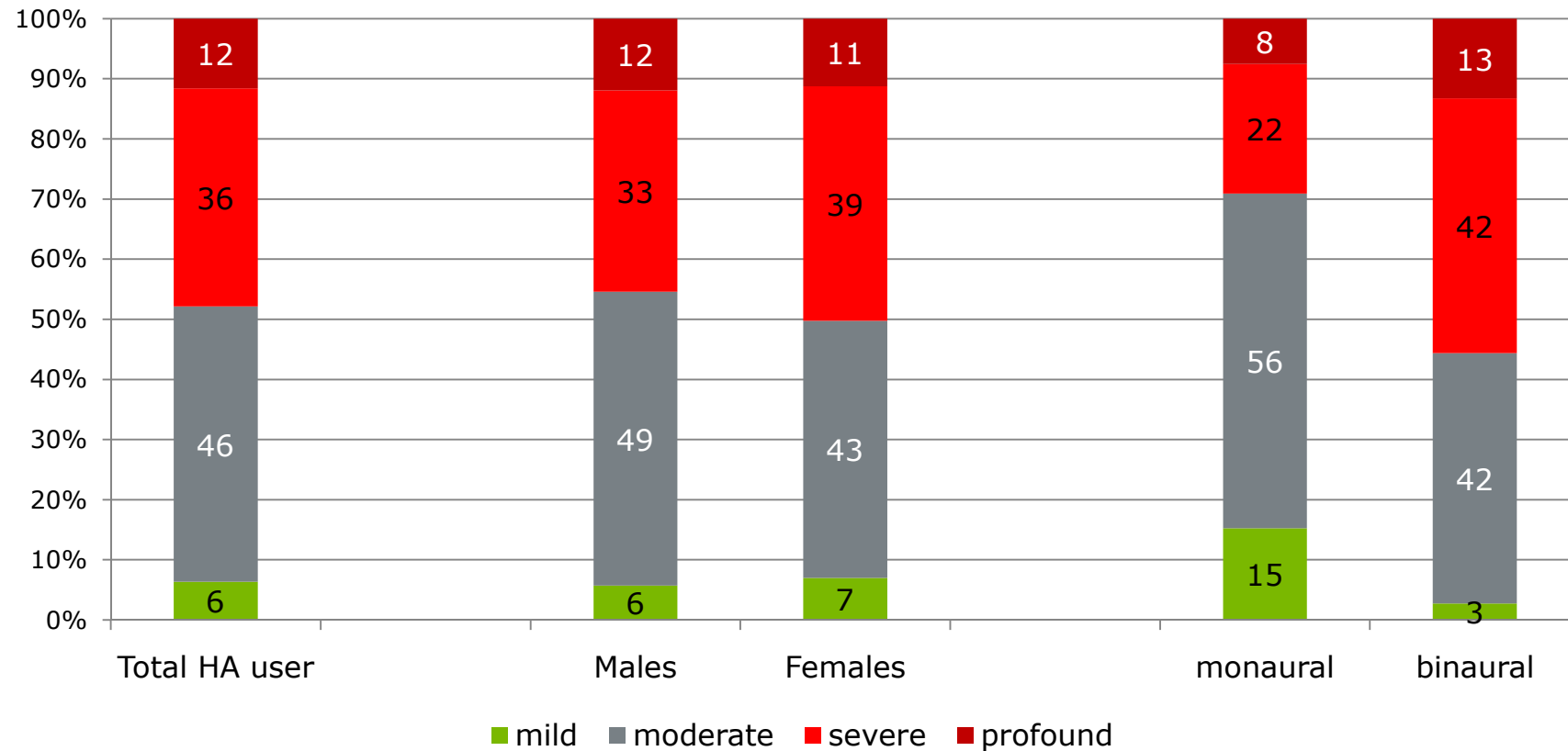


3. Analysis of hearing aid owners

Owners: Degree of hearing loss



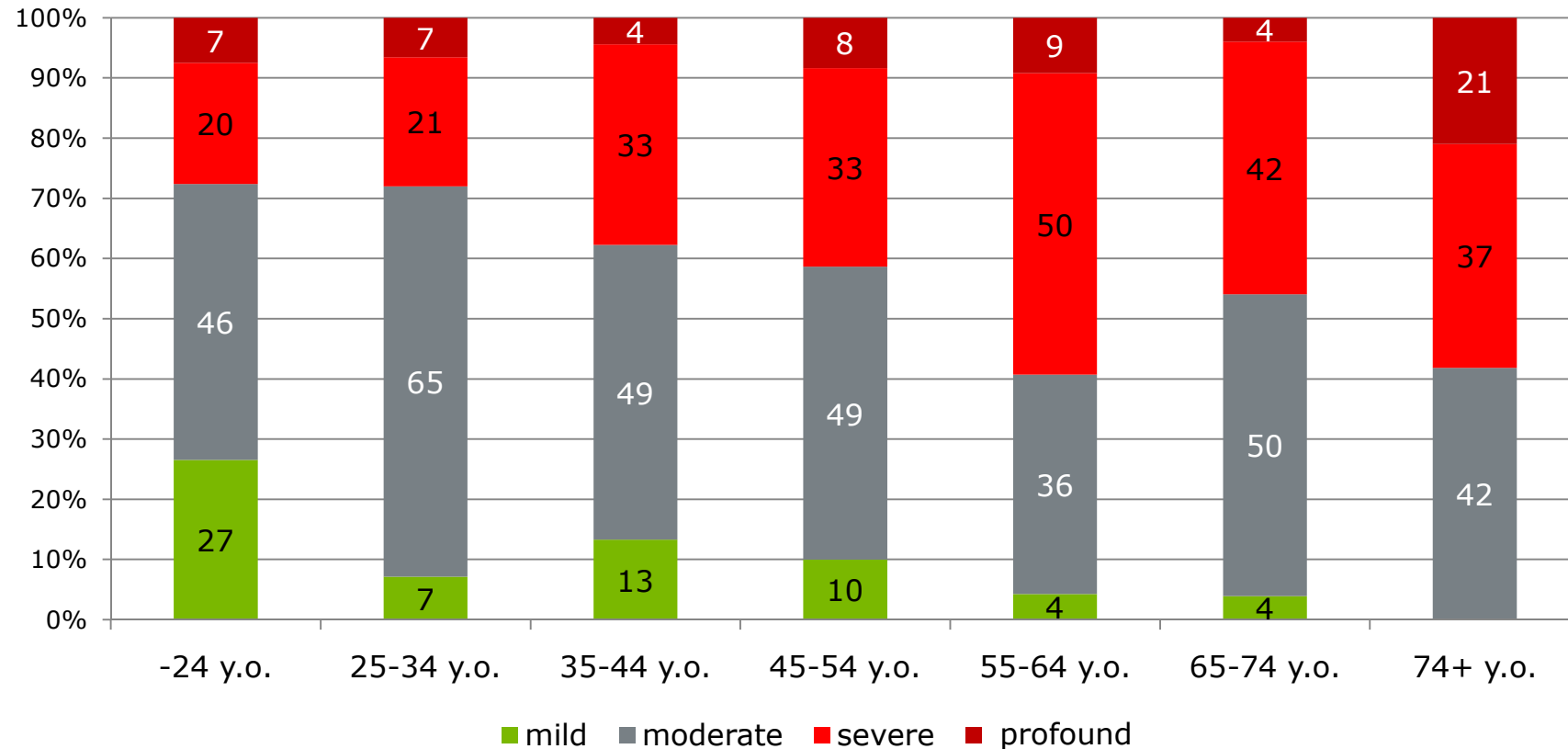
Subjective hearing loss of HA-owners: 48% of all HA-owners have a severe or profound hearing loss



HA-owner, n=501



Subjective hearing loss of HA-owners by age: linear increase of severity



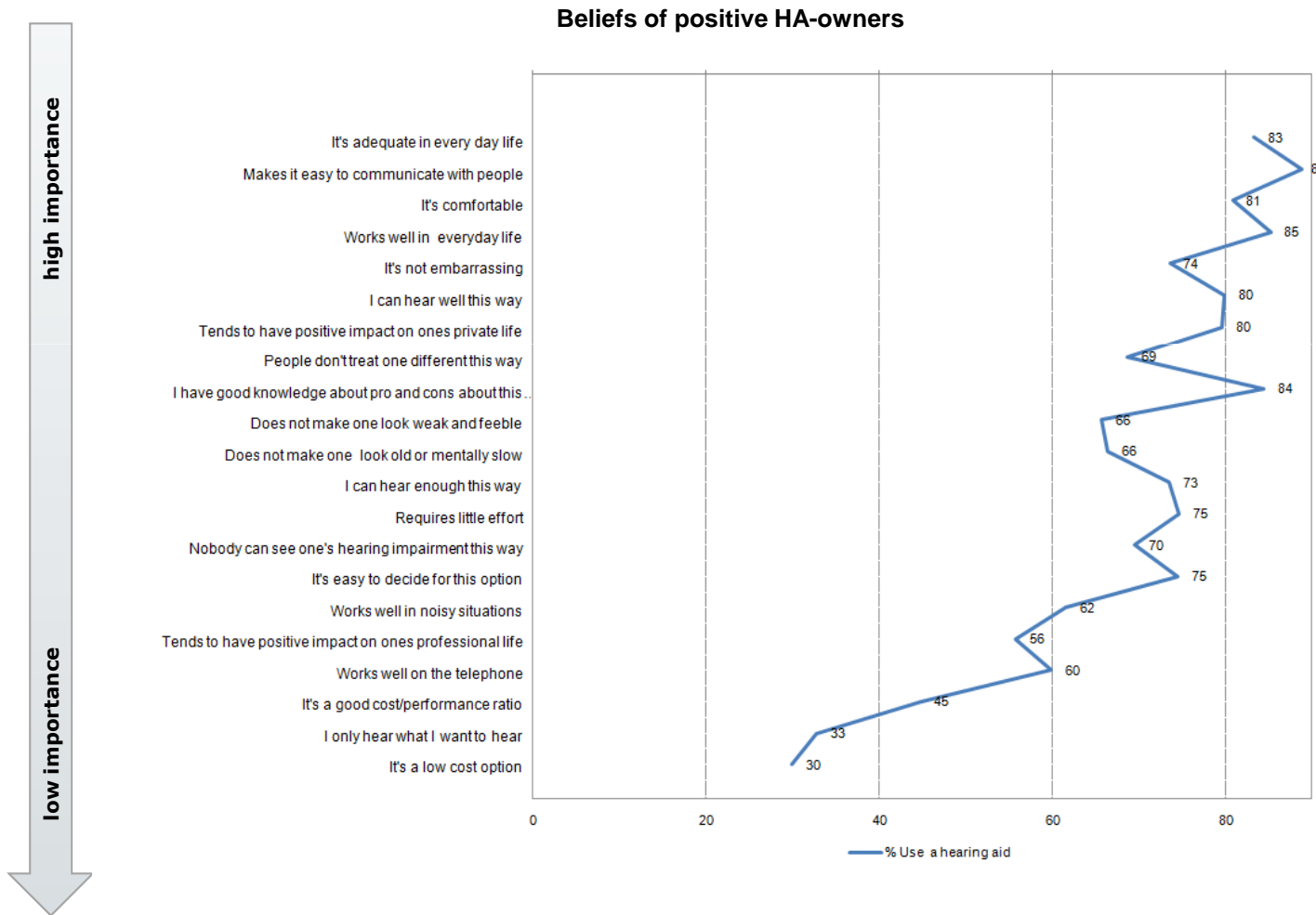
HA-owner, n=501



Owners: Drivers of preference



Beliefs of positive HA-owners: HA is the best solution to live with hearing loss. Price/costs of this option is less important to them.



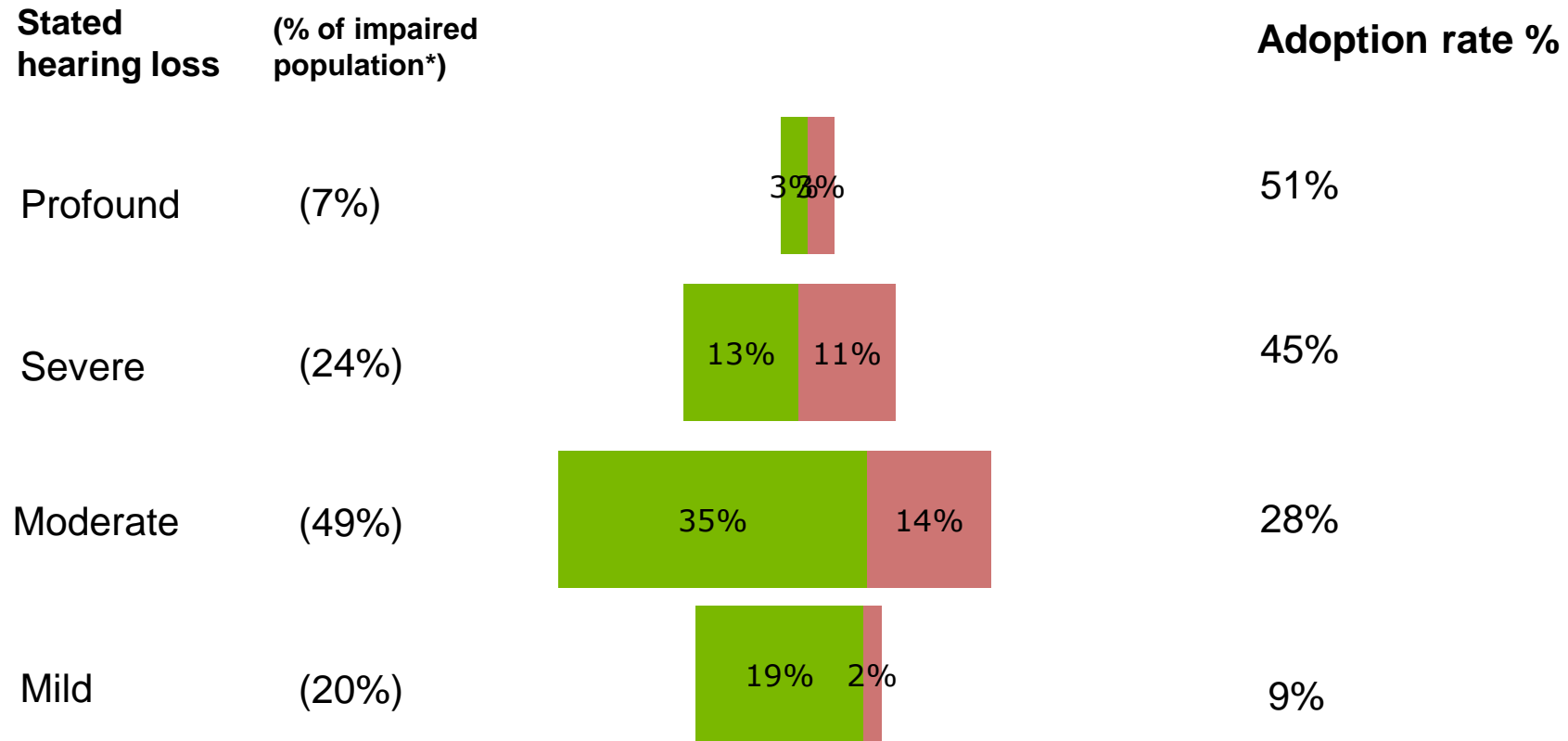
Question: There are different ways how to LIVE WITH HEARING LOSS. Please indicate which of the following statements applies to which option in your personal view.

Read: In this group, "It's adequate in every day life" is the most important criterion. 83% say that "use a hearing aid" is adequate in every day life.



Hearing aid ownership and usage

Low adoption rates within mild and moderate hearing loss



■ No hearing aid
■ Hearing aid

* Sums can differ from 100% due to rounding

(c) Anovum 2009 - EuroTrak France 2009

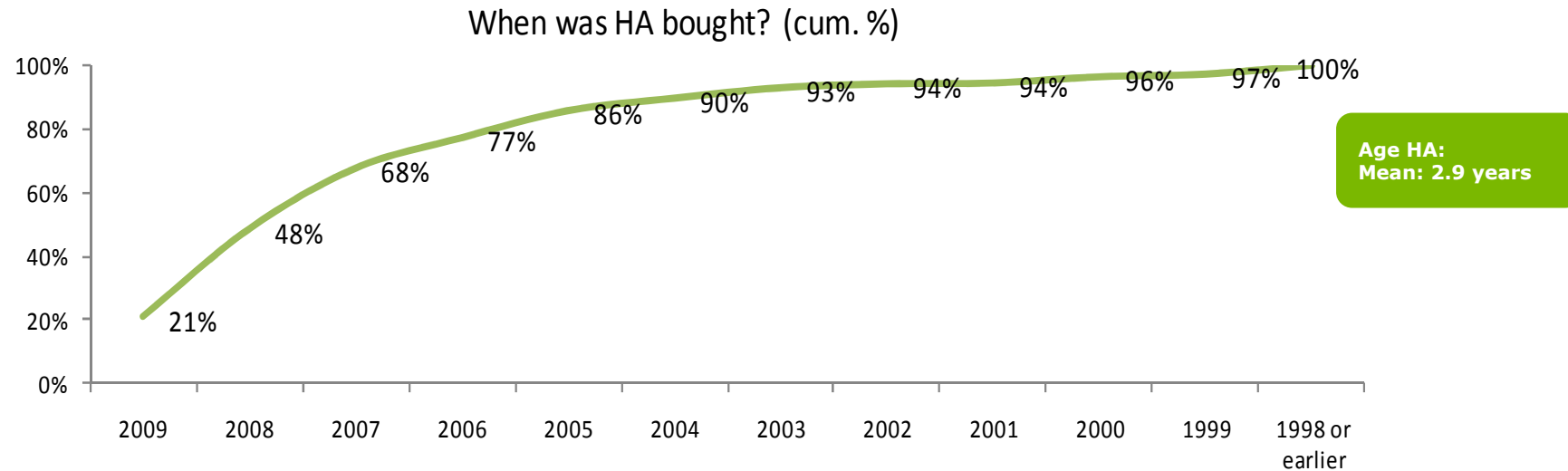
Note: These are self-reported figures; thresholds are subjective. Therefore the results may differ from measured data where we would expect more "mild" hearing loss.

Base: n=1304

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68% of the currently owned HAs were bought in 2007 or later.

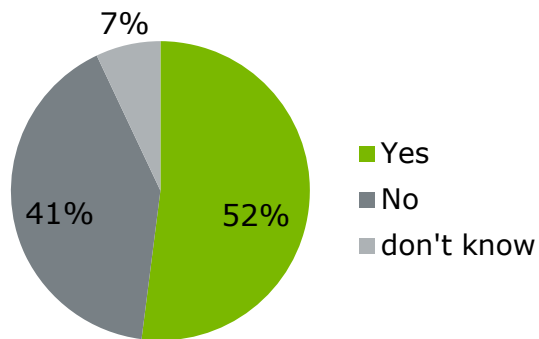


HA-owner, n=501



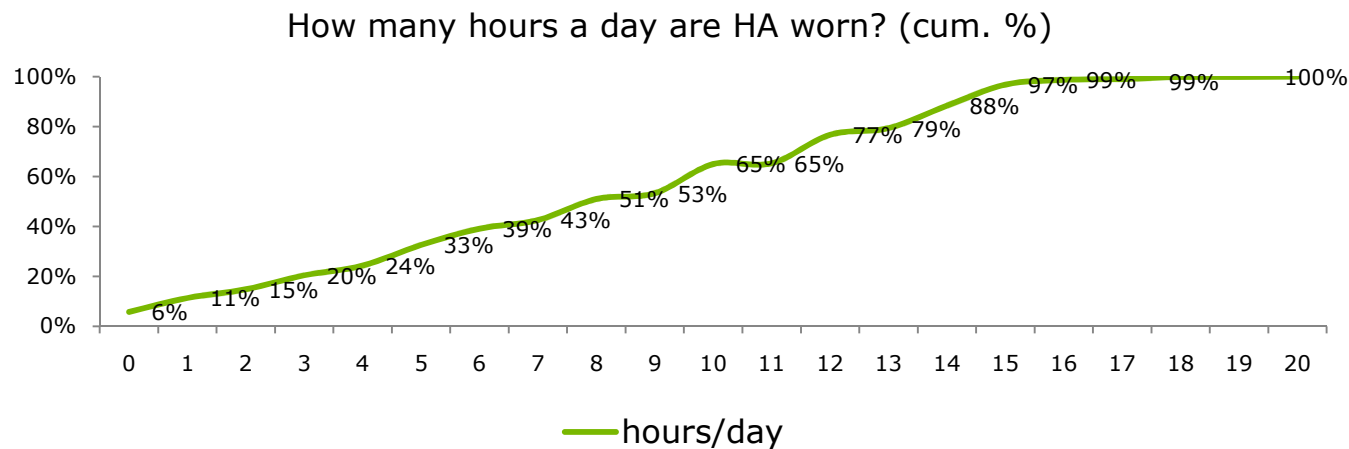
52% received some kind of 3rd party reimbursement

Owners: : Was any part or all of your hearing aid(s) paid for by a third party ?
(Insurance, Government, ...)



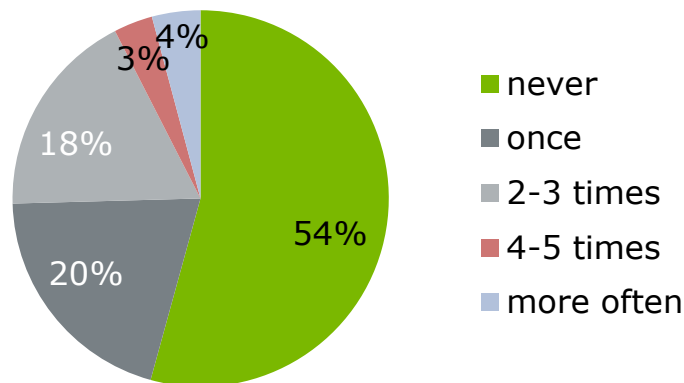
HA-owners, n=501

On average, HAs are worn 8.3 hours a day. 74% of the currently owned HAs either had no service need or only once.



**HA worn:
Mean: 8.3 hours/day**

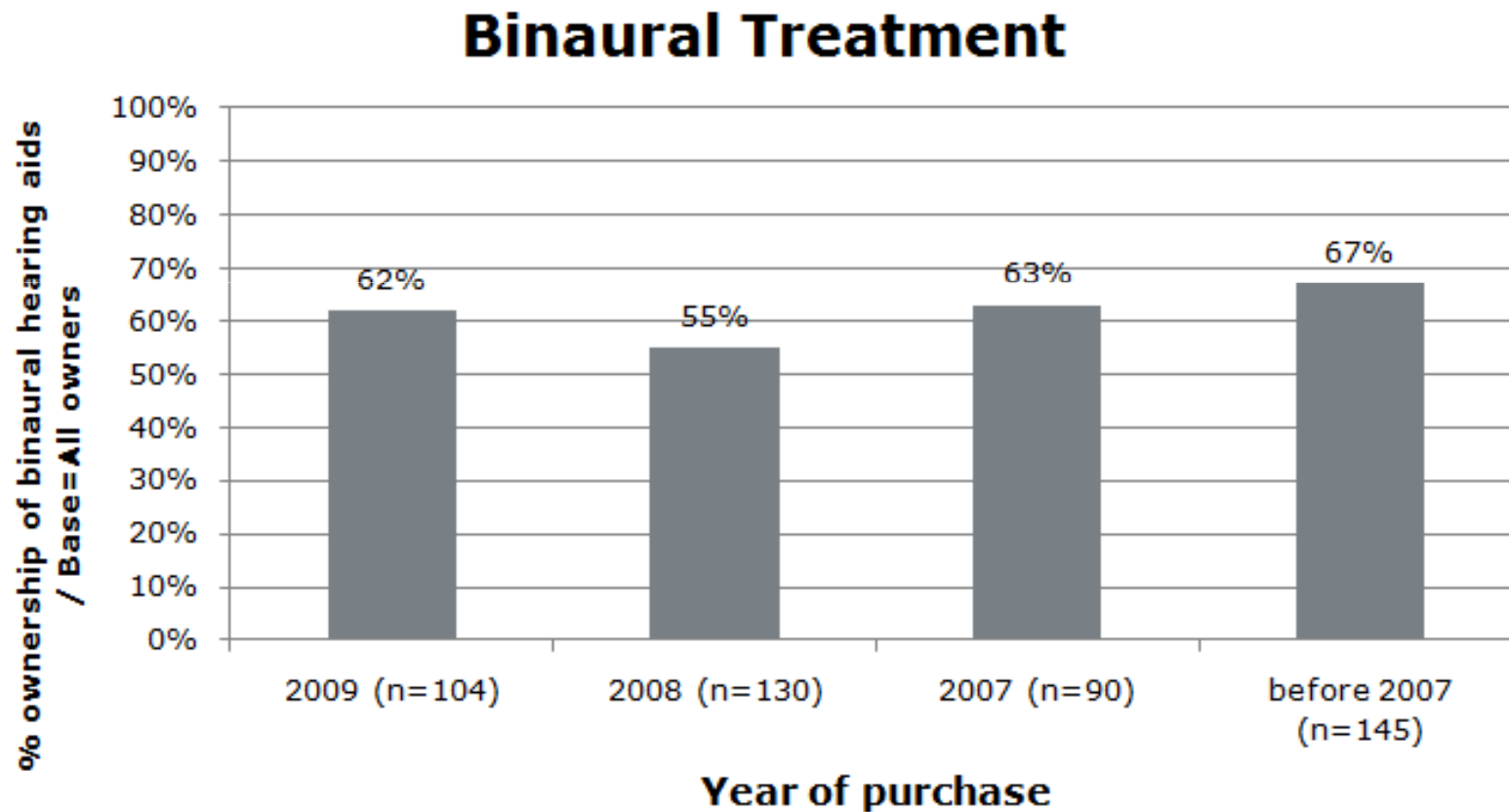
Repair required for current HA



HA-owner, n=501



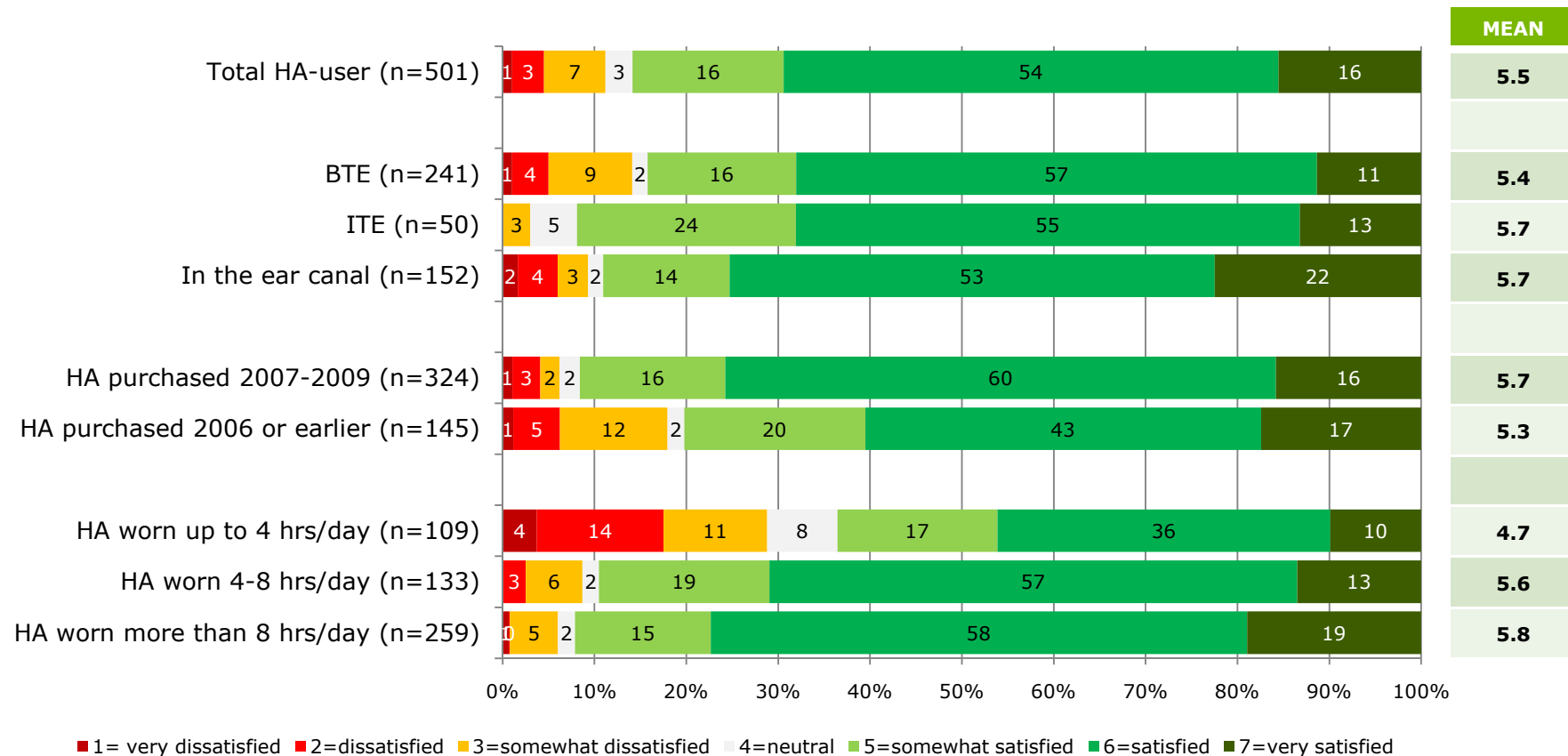
Monaural-binaural treatment by purchase date



Satisfaction with HA



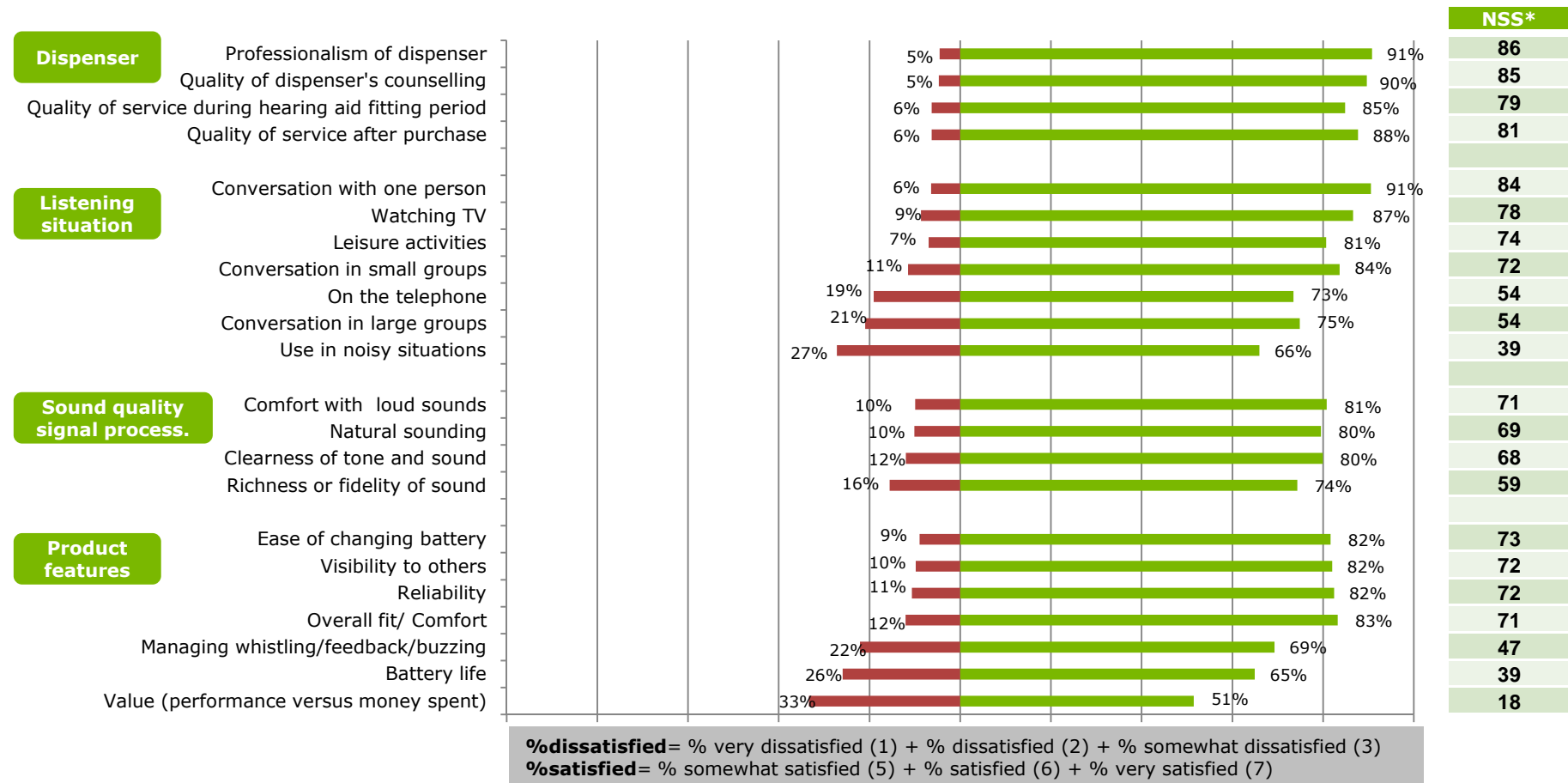
Overall satisfaction with HA: Highest satisfaction for the following groups: purchased 2007-2009, worn more than 8 hrs/day.



HA-owner, n=501



Satisfaction with current HAs



*NSS= Net Satisfaction Score (%satisfied - %dissatisfied)

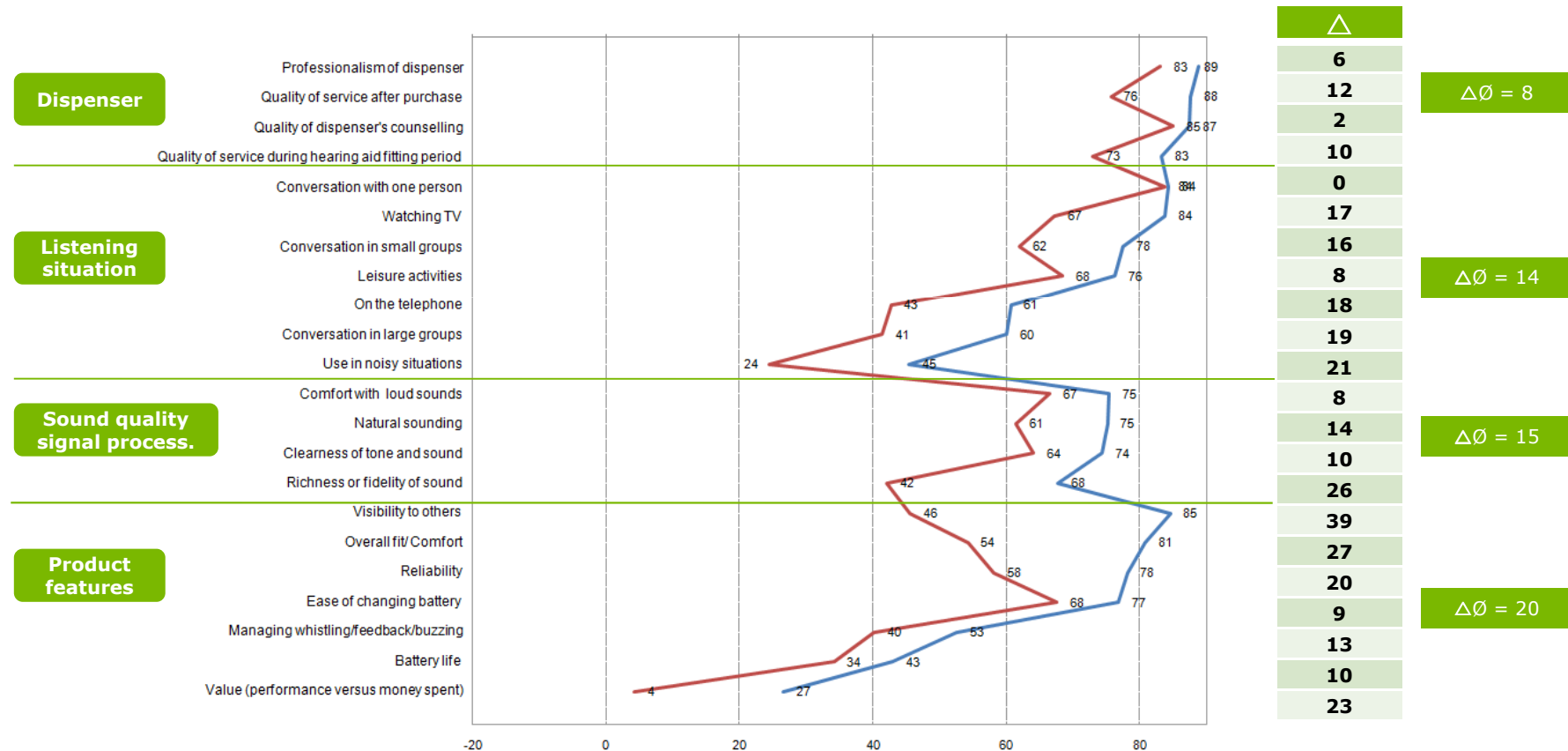
* NSS can differ from showed difference due to rounding

■ dissatisfied ■ satisfied

HA-owner, n=501



Satisfaction with current HAs (NSS*): HA purchased before 2007 vs. purchased 2007 or after



*NSS= Net Satisfaction Score (%satisfied - %dissatisfied)

— 2006 or earlier (n=145)

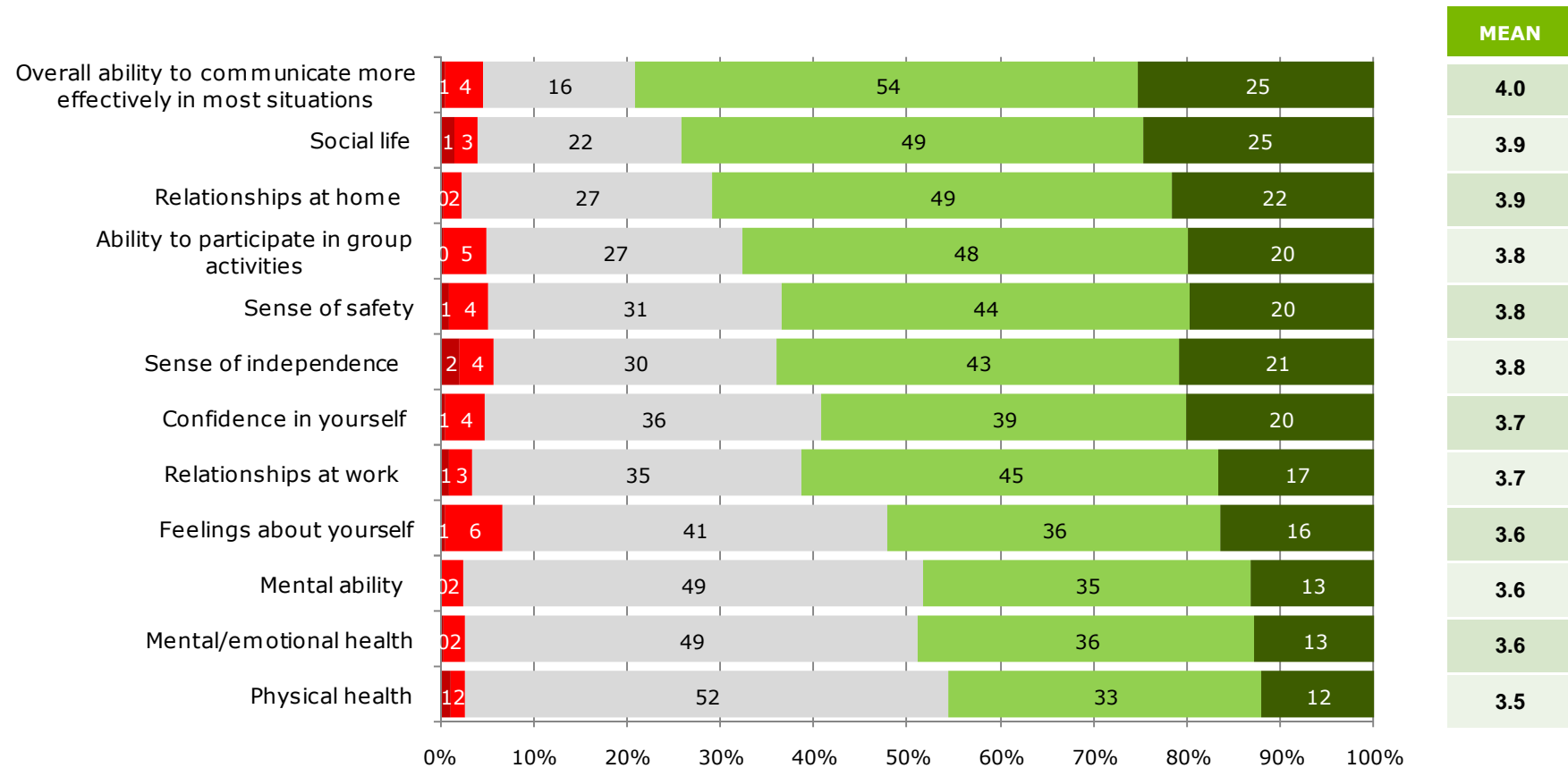
— 2009-2007 (n=324)



Positive impact of HAs



Significant positive impact of HAs on different aspects – especially communication effectiveness and social life/relationships at home have improved

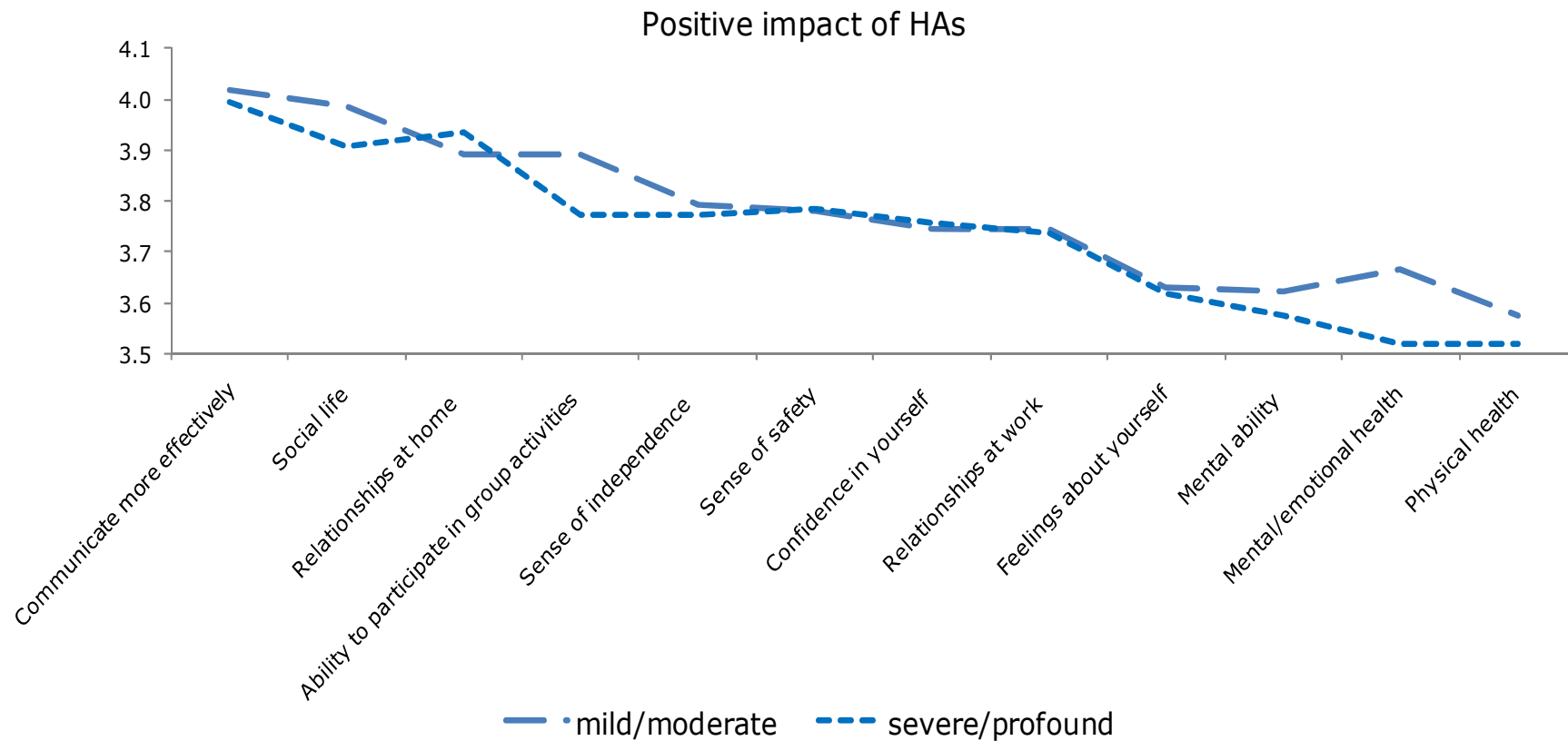


Sorted by descending mean

HA-owner, n=501



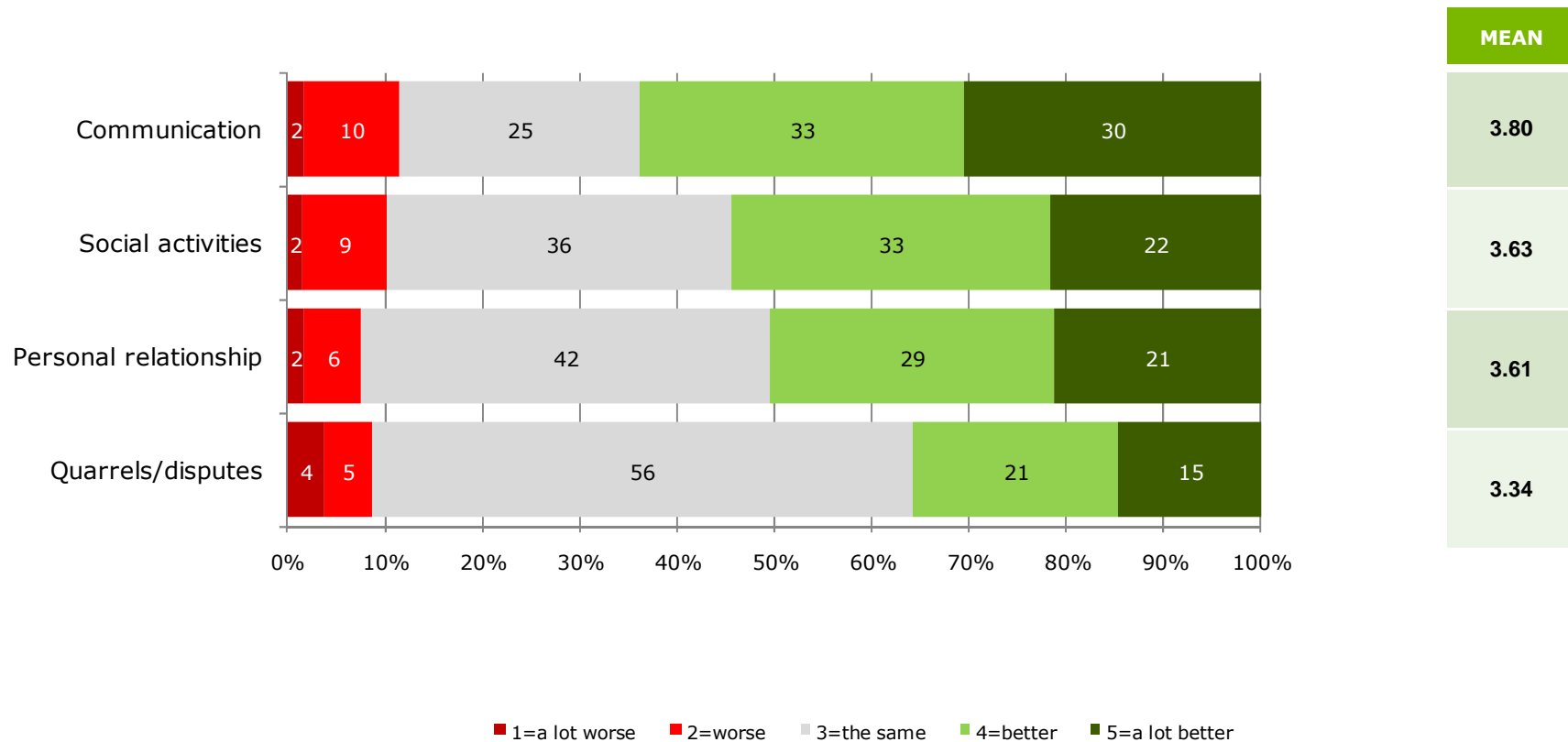
Impact of HAs is perceived most positive by patients with mild/moderate hearing loss



HA-owner, n=501



For the significant others, the situation has improved, since person in household/parent is wearing hearing aids (especially communication).



Sorted by descending mean

Someone in HH / parent have HA, n=414

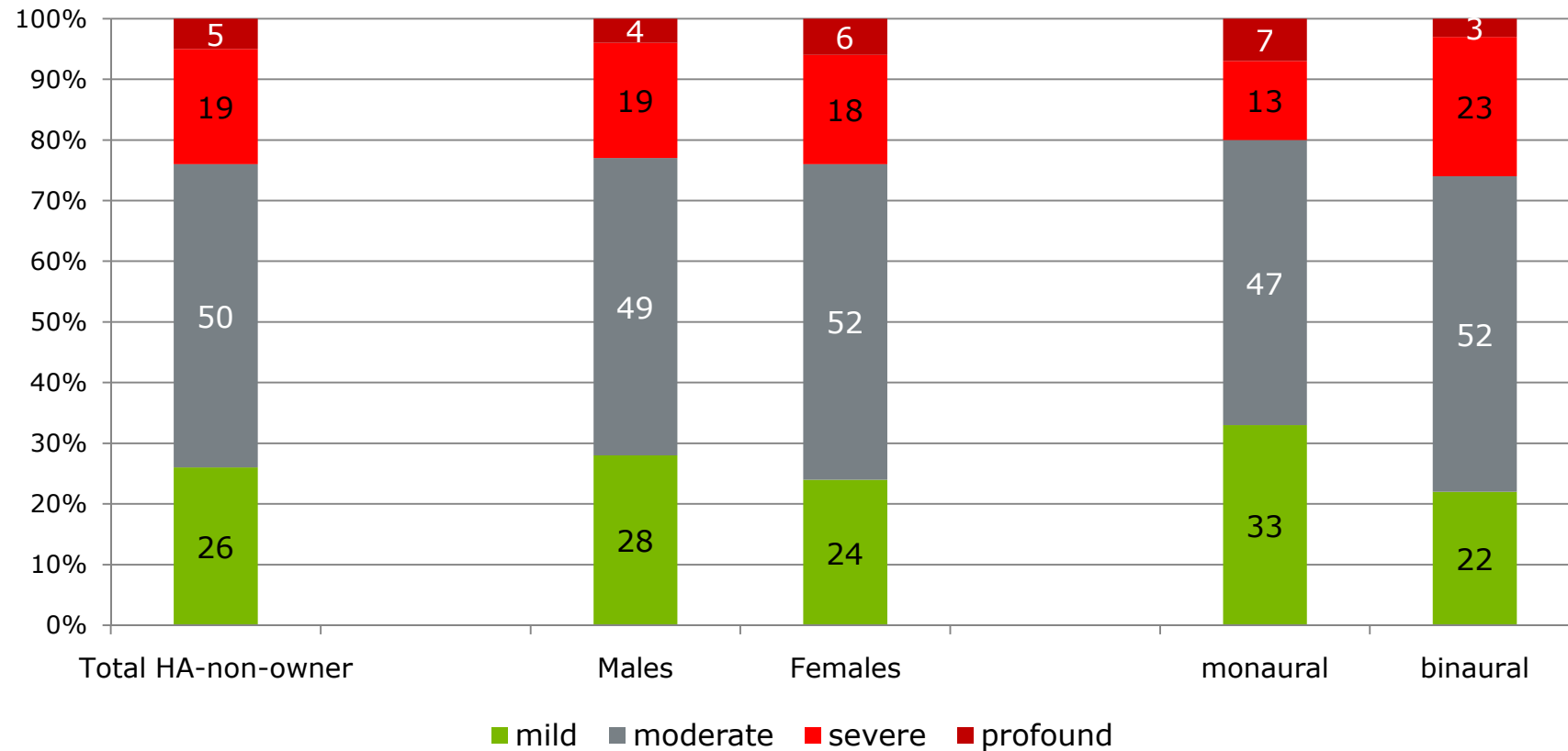


4. Analysis of hearing impaired non-owners

Non-owners: Degree of hearing loss



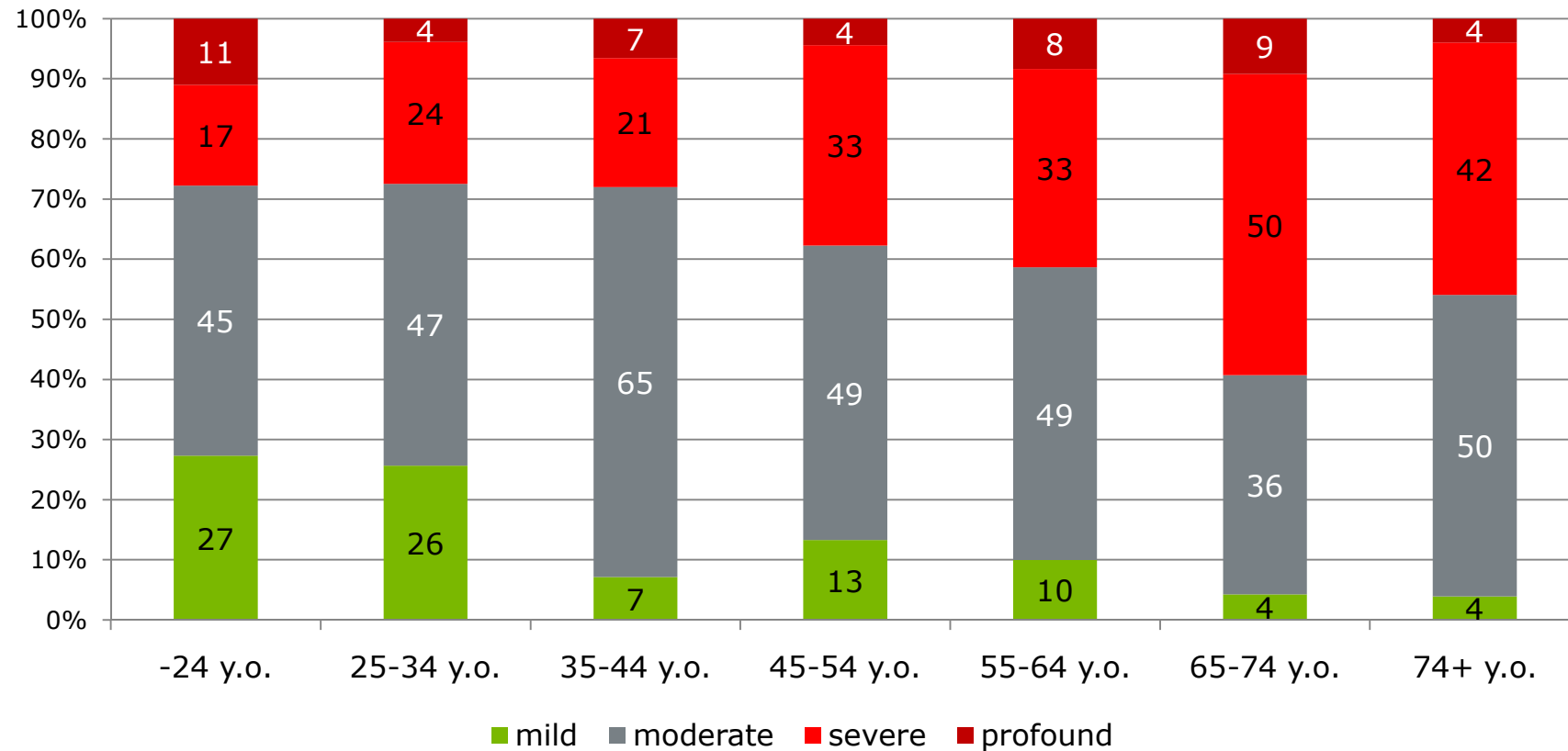
Subjective hearing loss of HA-non-owners: 24% have a severe to profound hearing loss



HA-non-owner, n=822



Subjective hearing loss of HA-non-users by age: increase of severeness is not strictly linear



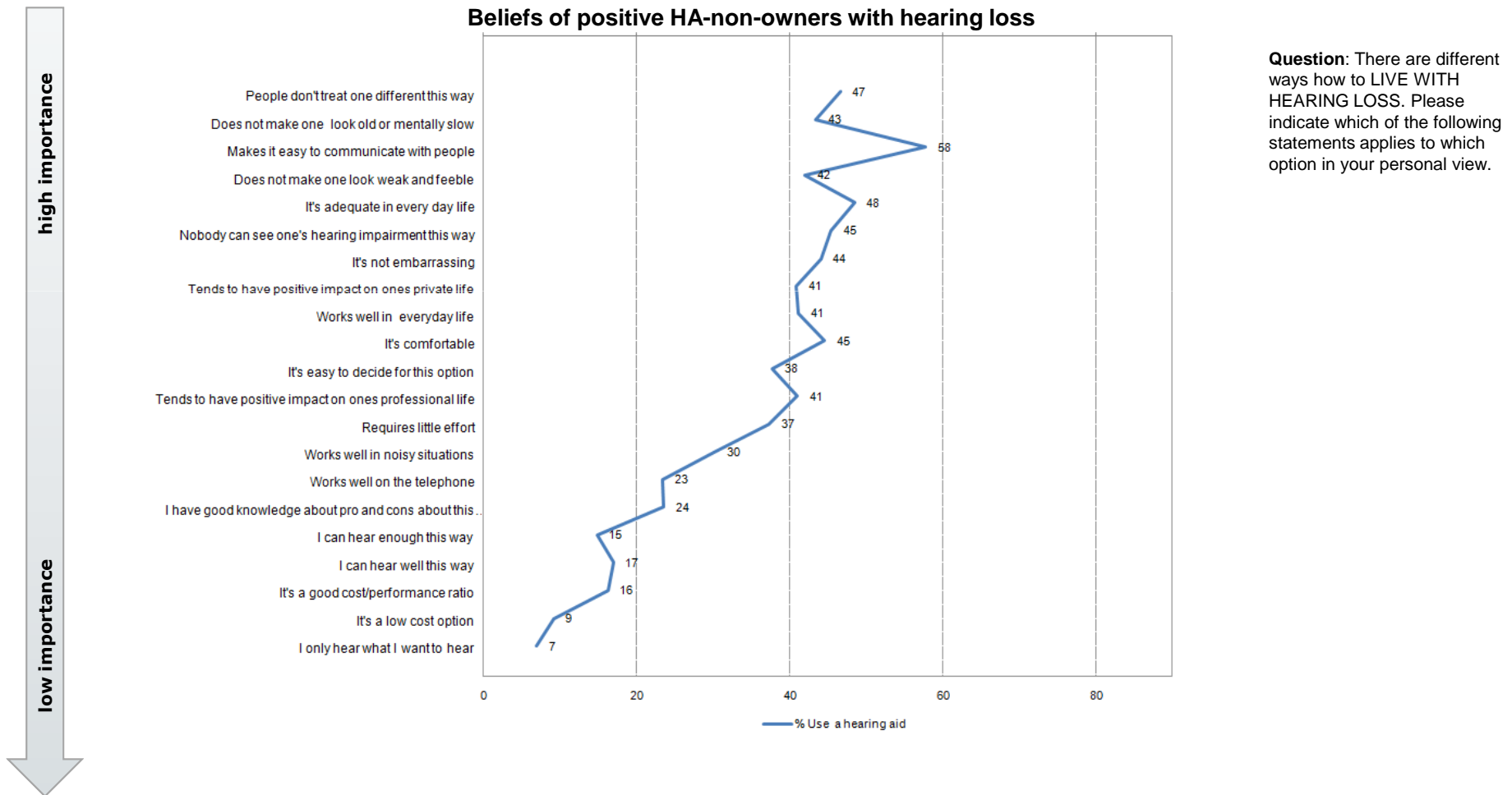
HA-non-user, n=822



Non-owners: Drivers



Beliefs of positive HA-non-owners: They tend not to fear stigma and agree about the advantages of hearing aids. Barriers to buy are: Costs, they believe that without HAs they only hear what they want to hear / hear enough.



Question: There are different ways how to LIVE WITH HEARING LOSS. Please indicate which of the following statements applies to which option in your personal view.

Read: In this group, "People don't treat one different this way" is the most important criteria. 47% say that one doesn't get treated different when "using a hearing aid".

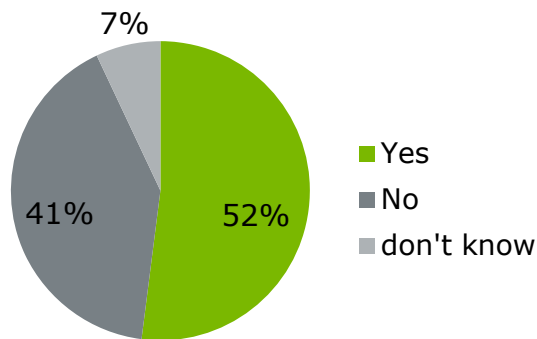


Reasons not to use hearing aids



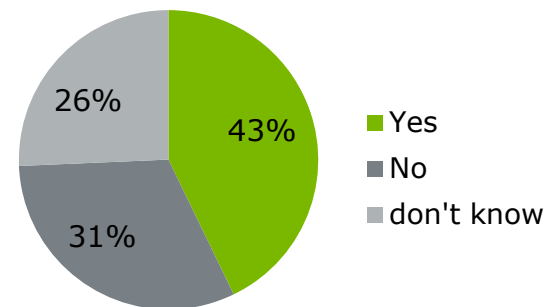
26% don't know whether insurance would pay; 31% think there is no third party payment

Owners: : Was any part or all of your hearing aid(s) paid for by a third party ? (Insurance, Government, ...)



HA-owners, n=501

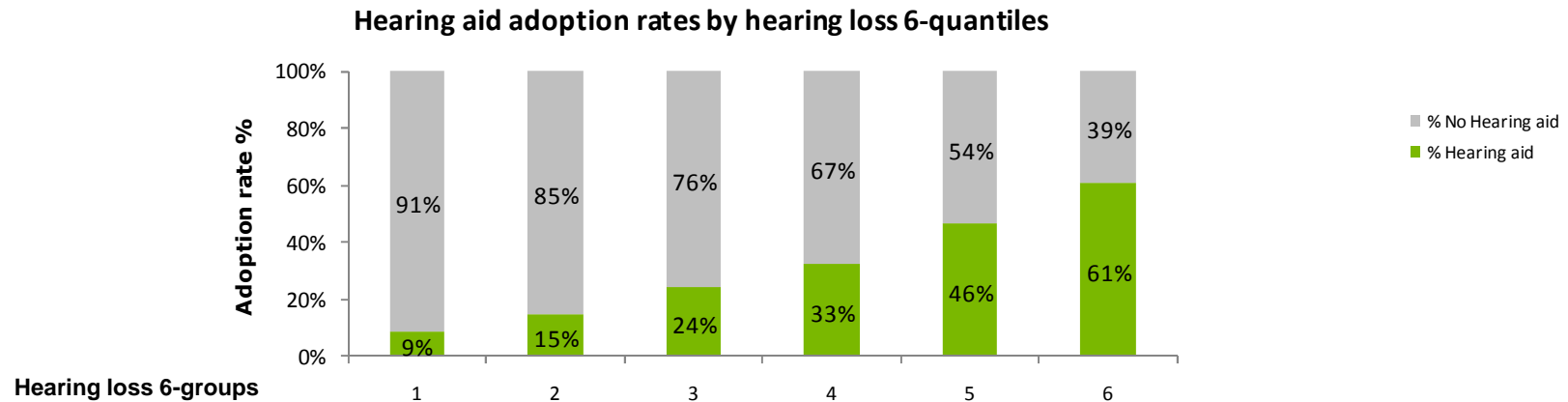
Non-owners: Based on your current knowledge, would any part or all of your hearing aid(s) be paid for by a third party? (Insurance, Government, ...)



HA-non-owners, n=803



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



HA-non-owner, n=803
HA-owner, n=501

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:*

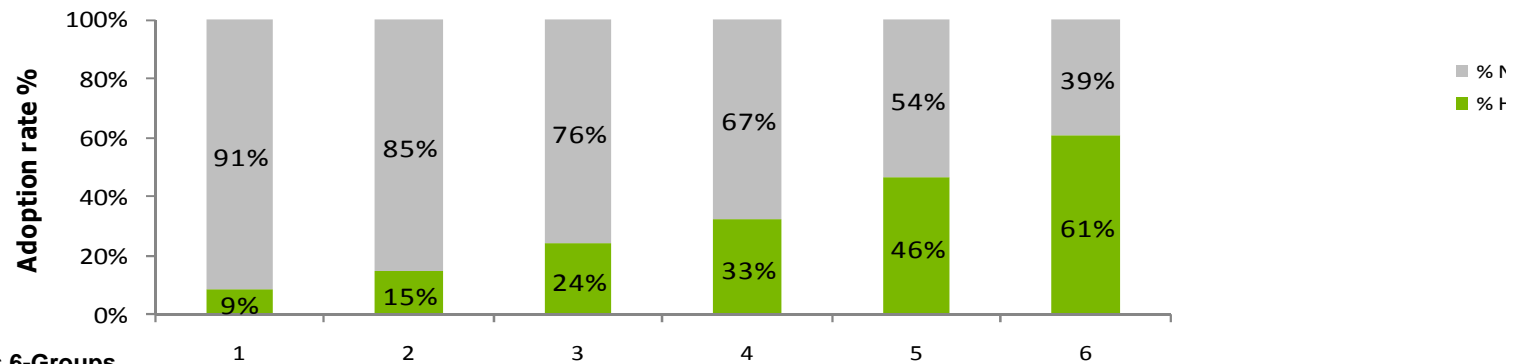
- Number of ears impaired (one or two)
 - Stated hearing loss (Mild to Profound)
 - Scores on 6 APHAB-EC - like questions (Scaled 1-7)
 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



(1): People without HAs: Hearing loss seems only slightly to impact the attitude towards HAs!

(2) People with HAs: The more severe the hearing loss – the higher the commitment to the HAs

Hearing aid adoption rates by hearing loss 6-quantiles



1

Hearing loss 6-Groups
People without hearing aid

Commitment hearing aid	14	15	16	17	17	11
Commitment live without hearing aid	26	24	24	26	23	43

2

People with hearing aid

Commitment hearing aid	16	24	25	29	29	28
Commitment live without hearing aid	17	14	15	14	14	14

HA-non-owner, n=803
HA-owner, n=501

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 1-7)
 - 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).

Commitment is a measure of the attitudinal preference for different options. Based on what respondents answered, a score is calculated that sums up to 100 for every individual over all options. It is known from brand research that this score outperforms other "purchase intent" scores in terms of correlation with real behaviour.



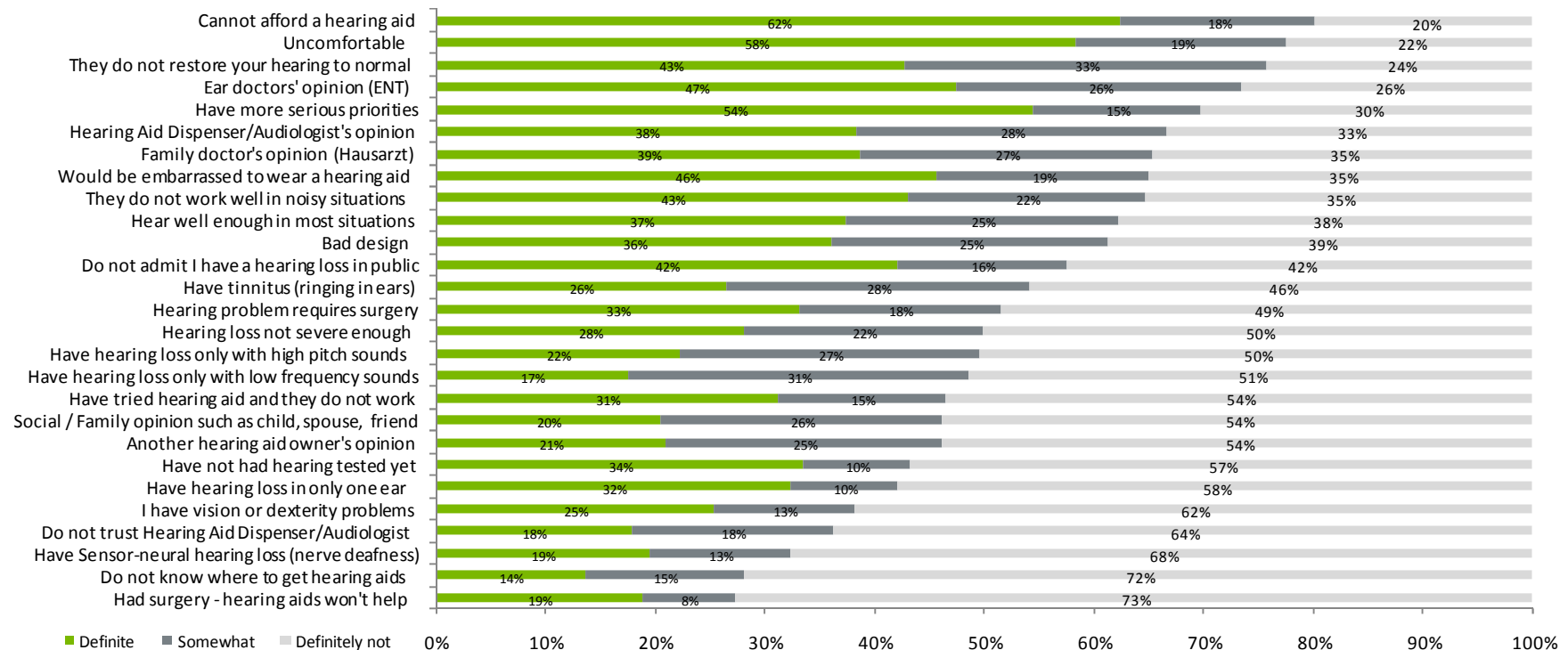
To analyse reasons of non-adoption we look at 6-groups 4-6 as the structure of hearing loss is more similar to that of HA owners

Hearing loss characteristics: Owners compared to non-owners

	% HA Owner (n=501)	%HA-Non-owner 1-3 6- groups	%HA-Non-owner 4-6 6- groups
Ears impaired			
Unilateral loss	29%	46%	28%
Bilateral loss	71%	54%	72%
		More similar hearing loss- structure	
Perceived loss			
Mild	6%	40%	3%
Moderate	46%	53%	46%
Severe	36%	6%	40%
Profound	12%	1%	12%



Non-owners with Top 50% hearing loss (Group 4-6*): The main reasons for not owning hearing aids are that (1) these people can not afford hearing aids and (2) they argue hearing aids don't work and are uncomfortable.

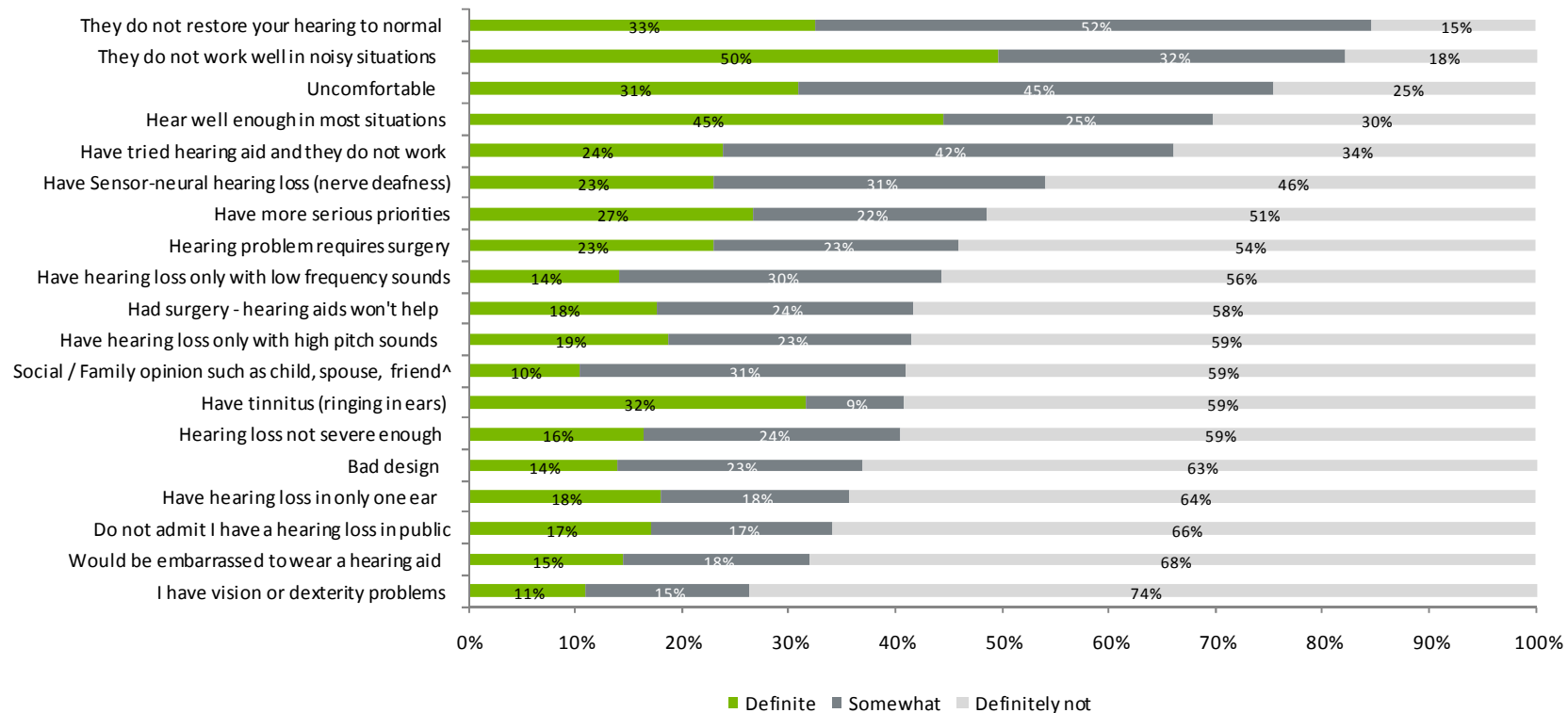


Reasons not to own hearing aids

Reason	Total population (n=803 unweighted)			4-6 6-groups (n =250 unweighted)		
	Definitely not	Somewhat	Definite	Definitely not	Somewhat	Definite
Cannot afford a hearing aid	25%	21%	54%	20%	18%	62%
Uncomfortable	24%	25%	51%	22%	19%	58%
They do not restore your hearing to normal	31%	28%	42%	24%	33%	43%
Ear doctors' opinion (ENT)	23%	25%	53%	26%	26%	47%
Have more serious priorities	32%	19%	49%	30%	15%	54%
Hearing Aid Dispenser/Audiologist's opinion	33%	26%	41%	33%	28%	38%
Family doctor's opinion (Hausarzt)	29%	32%	39%	35%	27%	39%
Would be embarrassed to wear a hearing aid	38%	20%	43%	35%	19%	46%
They do not work well in noisy situations	32%	26%	41%	35%	22%	43%
Hear well enough in most situations	25%	29%	46%	38%	25%	37%
Bad design	41%	24%	35%	39%	25%	36%
Do not admit I have a hearing loss in public	44%	20%	37%	42%	16%	42%
Have tinnitus (ringing in ears)	53%	23%	24%	46%	28%	26%
Hearing problem requires surgery	48%	16%	36%	49%	18%	33%
Hearing loss not severe enough	31%	29%	40%	50%	22%	28%
Have hearing loss only with high pitch sounds	47%	30%	23%	50%	27%	22%
Have hearing loss only with low frequency sounds	55%	26%	19%	51%	31%	17%
Have tried hearing aid and they do not work	54%	18%	28%	54%	15%	31%
Social / Family opinion such as child, spouse, friend	50%	22%	28%	54%	26%	20%
Another hearing aid owner's opinion	52%	23%	25%	54%	25%	21%
Have not had hearing tested yet	49%	15%	35%	57%	10%	34%
Have hearing loss in only one ear	50%	24%	26%	58%	10%	32%
I have vision or dexterity problems	64%	18%	18%	62%	13%	25%
Do not trust Hearing Aid Dispenser/Audiologist	64%	17%	19%	64%	18%	18%
Have Sensor-neural hearing loss (nerve deafness)	62%	16%	22%	68%	13%	19%
Do not know where to get hearing aids	75%	13%	12%	72%	15%	14%
Had surgery - hearing aids won't help	64%	11%	25%	73%	8%	19%



Main reason for not using the owned hearing aids: The absence of a real direct benefit.



Owners who don't use, n=39



Negative impact of hearing loss



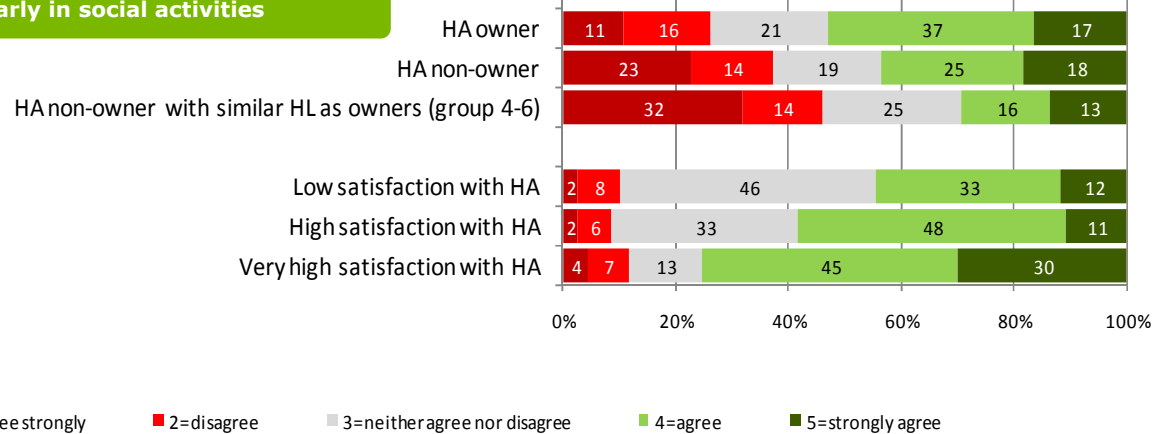
Hearing impaired non-owners tend to feel less sound and safe and participate less in social activity compared to satisfied hearing aid-owners.

Generally I feel safe and sound



MEAN
3.57
3.61
3.34
3.44
3.58
3.89
3.33
3.02
2.65
2.63
3.35
3.83

I participate regularly in social activities



1=disagree strongly 2=disagree 3=neither agree nor disagree 4=agree 5=strongly agree

HA-non-owner, n=803
HA-owner, n=501



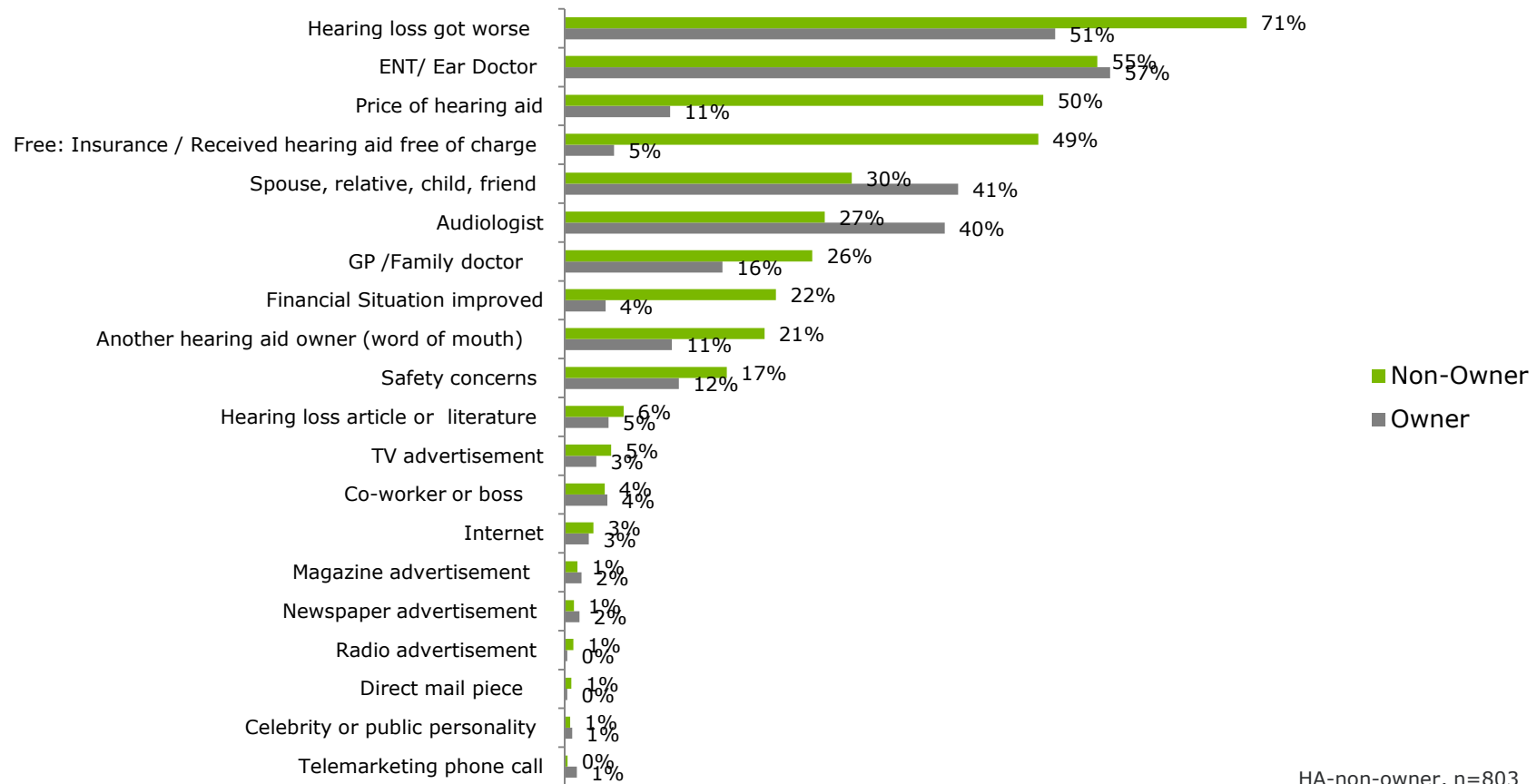
Buying intentions



What non-owners say would influence them to buy is not necessarily what owners say influenced them to buy. The most important influencing factors are worse hearing loss, GP, ENT and audiologist.

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

Non-owner: Think about the option to obtain / purchase a hearing aid. What do you think would influence you to obtain / purchase a hearing aid ?



HA-non-owner, n=803
HA-owner, n=501





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