

## Summary

# EuroTrak Germany 2009

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

# Summary

## 1. Introduction

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- EuroTrak Germany 2009 was designed and executed by Anovum (Zürich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).
- Sample sizes Germany 2009:
  - Total representative sample: n=14'185 people
  - Total hearing impaired: n=1'308 people
    - Hearing impaired non-owners: n=805 people with hearing loss (**HL**)
    - HA owners: n=503 people with hearing aid (**HA**)
- EuroTrak Germany 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

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- Stated hearing loss prevalence
  - Age groups 18+: 15.1%.
  - Total: 13.1%.
  - Binaural hearing loss: HA owners: 75%, HA non-owners: 57%.
- Hearing aid adoption rate (HA penetration)
  - Total: 31.8%.
  - Total age group 18+: 31.8%.
  - 60% of HA owners have binaural treatment. Trend rising.
- The route to the hearing aid
  - 77 out of 100 hearing impaired discuss their hearing loss with an ENT doctor or family doctor.

# Summary

## 3. Analysis of hearing aid owners

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- Hearing aid ownership and usage
  - 79% received some kind of 3<sup>rd</sup> party reimbursement.
  - More than 50% of the currently owned HAs were bought in 2007 or later.
  - The average age of the currently owned HAs is 3.4 years
  - On average, HAs are worn 7.7 hours a day.
  - 69% of the currently owned HAs either had no service need or only once (46% “no” + 23% “once”).
- Satisfaction with HAs
  - 73% of the HA owners are satisfied with their HAs (25% “somewhat satisfied” + 30% “satisfied” + 18% “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 “Hörakustiker” is generally high (75%-80%).
  - 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 sense of safety.

# Summary

## 4. Analysis of hearing impaired non-owners

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- Reasons not to own/use HAs
  - Information deficit non-owners: 61% don't know whether insurance would pay.
  - The main reasons for not using hearing aids are that people say they hear enough and that they argue hearing aids don't work and are uncomfortable.
  - 5% who own HAs don't use them. Main reasons for this are: "HAs do not restore hearing to normal", "Hear well enough in most situations" and "not good in noisy situations".
- "Negative non-owners" vs. "positive non-owners" opinion
  - Beliefs of "negative non-owners"
    - These people believe they hear enough without hearing aids.
    - They have a negative view on cost/performance ratio.
    - They are not well informed about HAs and live without HAs because it causes little effort and they don't have to take a decision.
  - 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, knowledge about HAs 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 acquiring 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 acquire a hearing aid within the next year.
  - What non-owners say would influence them to acquire is not necessarily what owners say influenced them to acquire. 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 Germany 2009

# Detailed Results: Roadmap

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## 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

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# 1. Introduction



# Organization of EuroTrak Germany 2009

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## Organization

- 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 – Germany/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

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# 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=14'185** 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=503** hearing aid owners and **n=805** hearing impaired non-owners

# In search of hearing impaired people

- Step 1:** Structure of total representative screening interviews sample (weighted) : n=14185 people

Age \* Gender Crosstabulation

		Count			% of Total		
		Gender			Gender		
		Male	Female	Total	Male	Female	Total
Age	<= 14	1026	974	2000	7.2%	6.9%	14.1%
	15 - 24	848	815	1663	6.0%	5.7%	11.7%
	25 - 34	859	833	1692	6.1%	5.9%	11.9%
	35 - 44	1221	1162	2383	8.6%	8.2%	16.8%
	45 - 54	1070	1018	2088	7.5%	7.2%	14.7%
	55 - 64	809	826	1635	5.7%	5.8%	11.5%
	65 - 74	734	834	1568	5.2%	5.9%	11.1%
	74+	392	764	1156	2.8%	5.4%	8.1%
Total		6959	7226	14185	49.1%	50.9%	100.0%

Establish prevalence of hearing loss and hearing aid ownership

- Step2:** Structure of hearing impaired sample (weighted\*): n=1308 people

Age rec \* SEX Crosstabulation

		Count			% of Total		
		SEX			SEX		
		Male	Female	Total	Male	Female	Total
Age rec	bis 14	29	15	44	2.2%	1.1%	3.4%
	15 - 24	32	27	59	2.4%	2.1%	4.5%
	25 - 34	66	42	108	5.0%	3.2%	8.3%
	35 - 44	86	63	149	6.6%	4.8%	11.4%
	45 - 54	104	69	173	8.0%	5.3%	13.2%
	55 - 64	118	75	193	9.0%	5.7%	14.8%
	65 - 74	149	118	267	11.4%	9.0%	20.4%
	74+	115	200	315	8.8%	15.3%	24.1%
Total		699	609	1308	53.4%	46.6%	100.0%

Details about satisfaction with hearing aids (n=503 owner) and reasons for non-adoption (n=805 impaired non-owner)

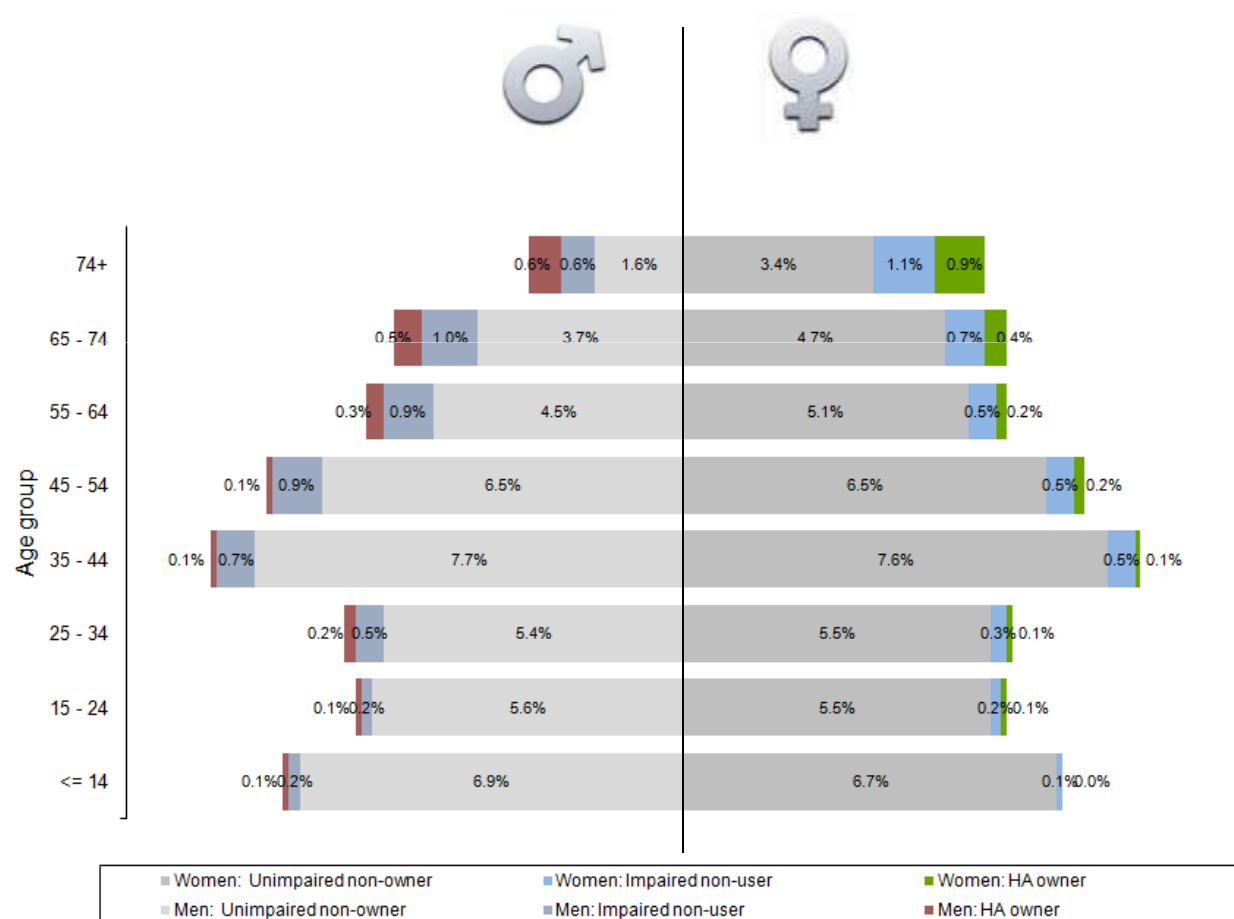
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## 2. Market overview

# Prevalence of hearing loss and adoption rate

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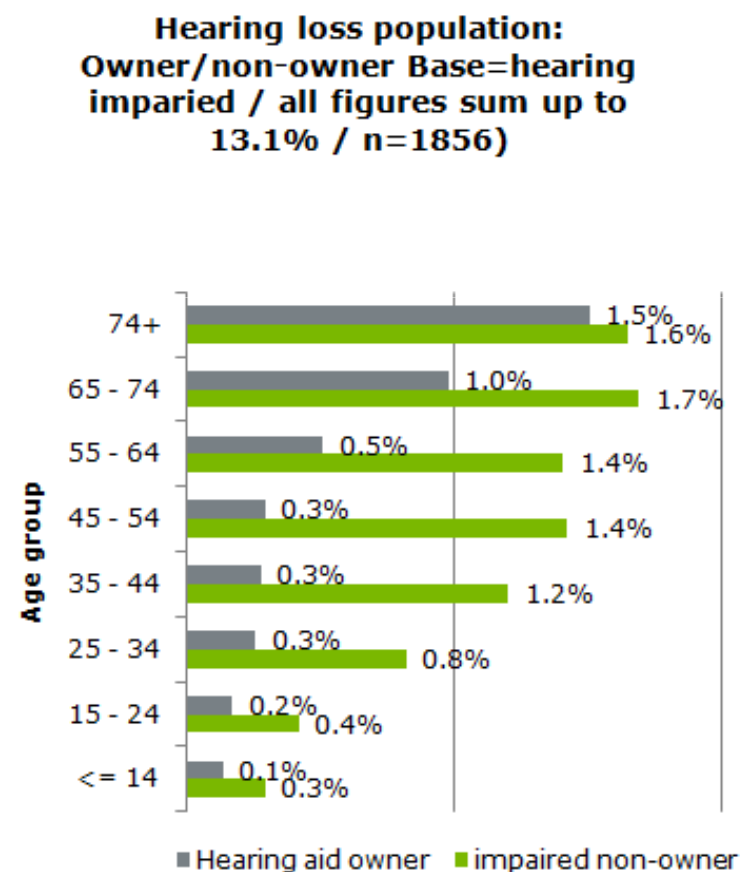
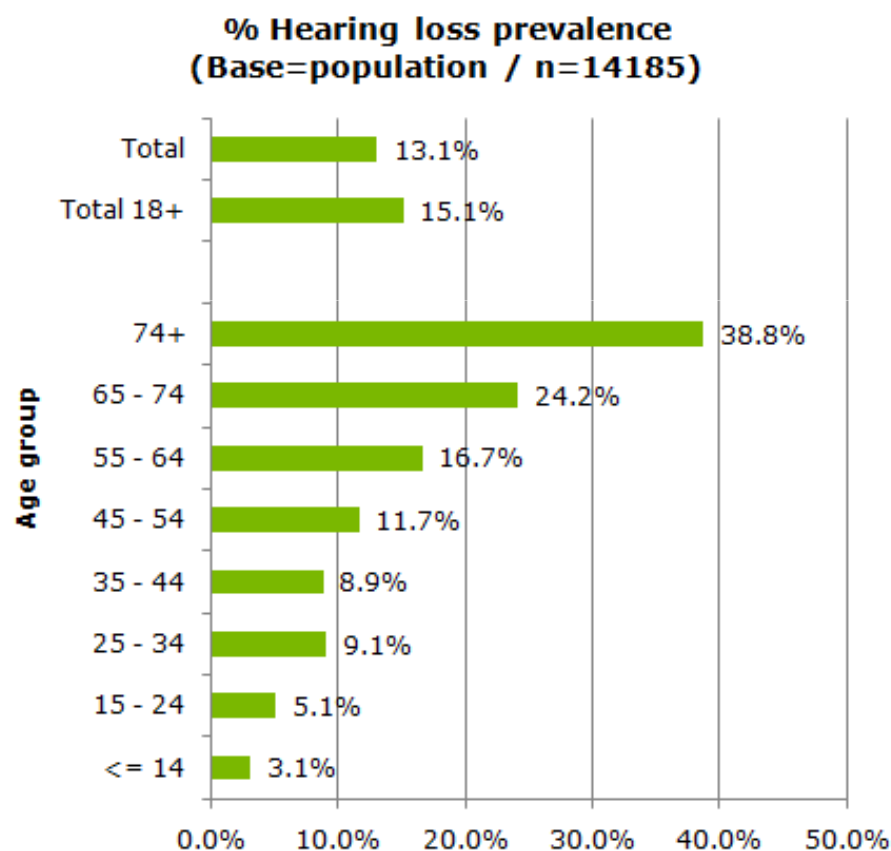
# Hearing loss and hearing instrument ownership by gender/age (self-reported)



Base: n= 14183

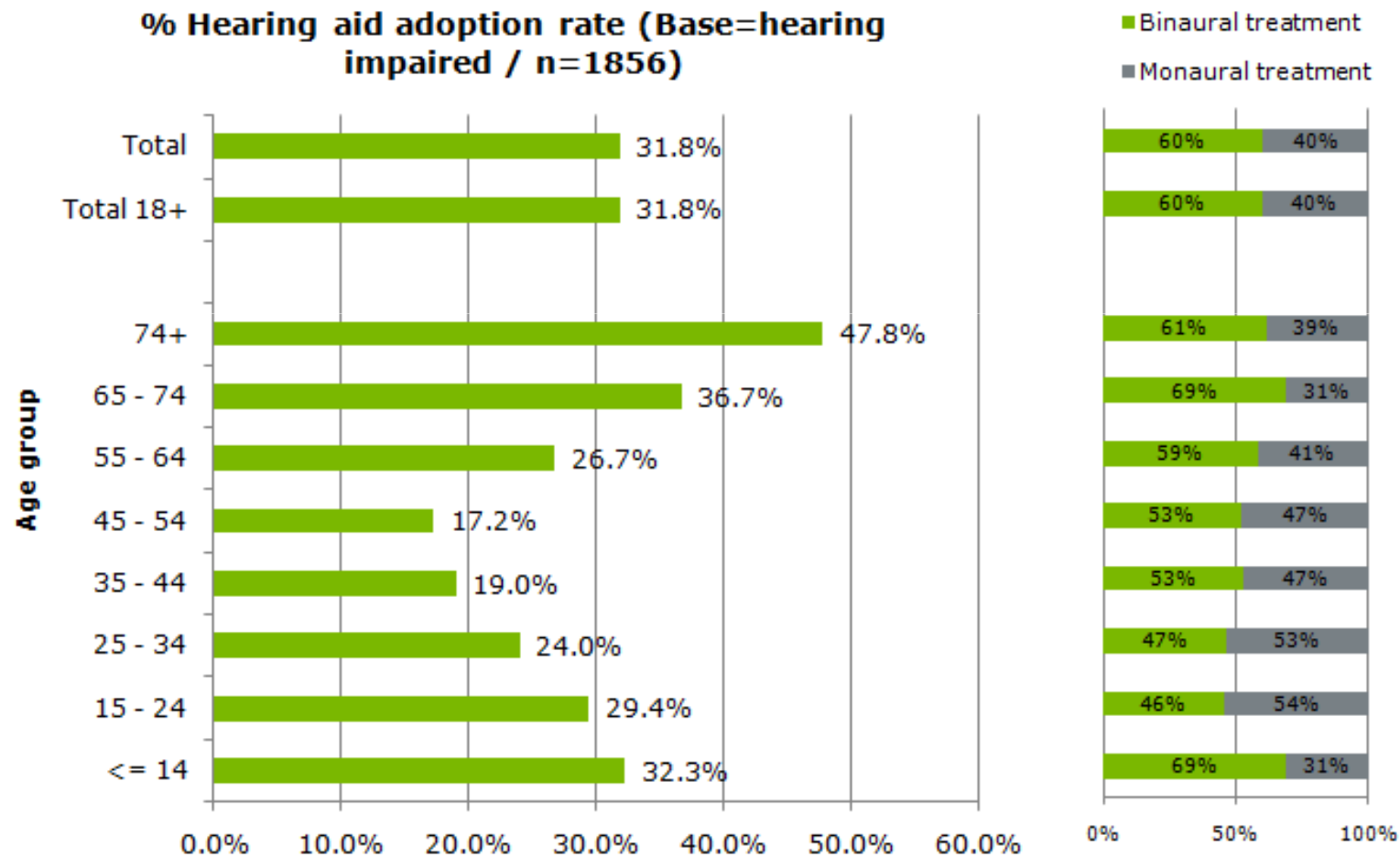


# Hearing loss prevalence Germany 2009 (self-reported)



# Hearing aid adoption rate Germany 2009

## Total adoption rate is 31.8%



Base: n= 589 (HA owners)

# Demographics of hearing aid owners and non-owners

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# Hearing loss

## Hearing loss characteristics: Owners compared to non-owners

	%HA-Non-owner (n=805)	% HA Owner (n=503)	Hearing Aid Adoption (%)	People with stated HL without HA*
<b>Ears impaired</b>				
Unilateral loss	43%	25%	22%	3'150'000
Bilateral loss	57%	75%	39%	4'175'000
<b>Perceived loss</b>				
Mild	31%	6%	8%	2'270'000
Moderate	50%	31%	22%	3'660'000
Severe	15%	43%	58%	1'100'000
Profound	4%	21%	70%	290'000

n's are unweighted whereas the shown results are weighted

\* projection

# Demographics (1): Hearing instrument adoption rates and populations

Hearing impaired population n=1856

Category	Demographics	Total sample unweighted n	Hearing impaired %	Hearing aid adoption rate % (Base=hearing impaired)	Hearing aid non owner (Categories add to 100%)	Hearing aid owner (Categories add to 100%)
Gender	Male	6954	14%	29%	55.5%	49.2%
	Female	7229	12%	35%	44.5%	50.8%
Age	<= 14	1323	3%	32%	3.3%	3.3%
	15 - 24	1762	5%	29%	4.8%	4.2%
	25 - 34	1355	9%	24%	9.2%	6.4%
	35 - 44	1802	9%	19%	13.5%	6.7%
	45 - 54	2620	12%	17%	16.0%	7.1%
	55 - 64	2314	17%	27%	15.8%	12.5%
	65 - 74	1806	24%	37%	19.0%	23.5%
	74+	1201	39%	48%	18.5%	36.3%
Inhabit	<= 10'000	3417	12%	27%	23.8%	19.3%
	> 10'000, <= 50'000	3748	13%	31%	27.3%	25.8%
	> 50'000, <= 500'000	3718	13%	34%	26.0%	28.3%
	> 500'000, <= 1 Mio.	1473	14%	37%	10.3%	12.7%
	> 1 Mio.	1638	15%	34%	12.7%	13.9%
HHsize	1 Person	1937	16%	32%	15.7%	16.1%
	2 Persons	4680	15%	33%	35.0%	37.3%
	3 Persons	3427	12%	31%	22.4%	21.4%
	4 Persons	2766	11%	30%	18.0%	16.2%
	5+ Persons	1373	11%	32%	8.8%	8.9%
Type	Single HH	1933	20%	39%	18.0%	25.1%
	Couple without kid(s)	4586	17%	32%	36.6%	36.4%
	Couple with kid(s)	5588	9%	25%	33.4%	23.4%
	Single mom/dad with kid(s)	759	6%	19%	3.1%	1.6%
	Retirement home, hospital etc.	136	53%	60%	2.2%	7.1%
	Other	1181	11%	31%	6.7%	6.5%

Owner: n=589  
Non-owner: n=1267



# Demographics (2) Hearing instrument adoption rates and populations

Hearing impaired population n=1856

Category	Demographics	Total sample unweighted n	Hearing impaired %	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 )	7258	17%	31%	62.0%	59.7%
	The spouse of the head of the household	3411	13%	29%	22.9%	20.4%
	Daughter/son of head of household	2506	3%	23%	6.6%	4.3%
	Other Person	1008	21%	46%	8.6%	15.6%
Employment	Full time	8096	9%	22%	50.1%	32.3%
	Part time	991	9%	22%	5.6%	3.6%
	No job	742	7%	25%	3.4%	2.6%
	Retired	3695	25%	41%	37.8%	59.4%
	Student	523	9%	23%	3.1%	2.1%
Education	Hauptschule	1860	17%	39%	15.3%	21.9%
	Mittlere Reife (Realschule)	2687	11%	27%	17.3%	14.2%
	Abitur/Fachabitur	1862	11%	29%	12.5%	11.5%
	Lehrabschluss/Anlehre	2676	13%	32%	18.9%	19.9%
	Höhere Berufsausbildung (Techniker, Meister )	1351	15%	26%	11.6%	9.2%
	Fachhochschule	1342	11%	29%	8.8%	8.3%
	Universitätsabschluss	1864	12%	30%	12.3%	12.2%
	Anderes	410	14%	27%	3.2%	2.7%
HH Income	Unter 10.000 Euro	997	11%	21%	7.3%	4.2%
	10.000 - 19.999 Euro	2187	13%	29%	18.0%	15.6%
	20.000 - 29.999 Euro	2557	13%	33%	20.1%	21.1%
	30.000 - 39.999 Euro	2259	13%	22%	20.3%	12.4%
	40.000 - 49.999 Euro	1464	16%	35%	13.3%	15.3%
	50.000 - 59.999 Euro	1061	14%	44%	7.9%	13.0%
	60.000 - 79.999 Euro	1012	15%	35%	8.7%	10.1%
	> 80.000 Euro	599	15%	47%	4.4%	8.3%



Owner: n=589  
Non-owner: n=1267



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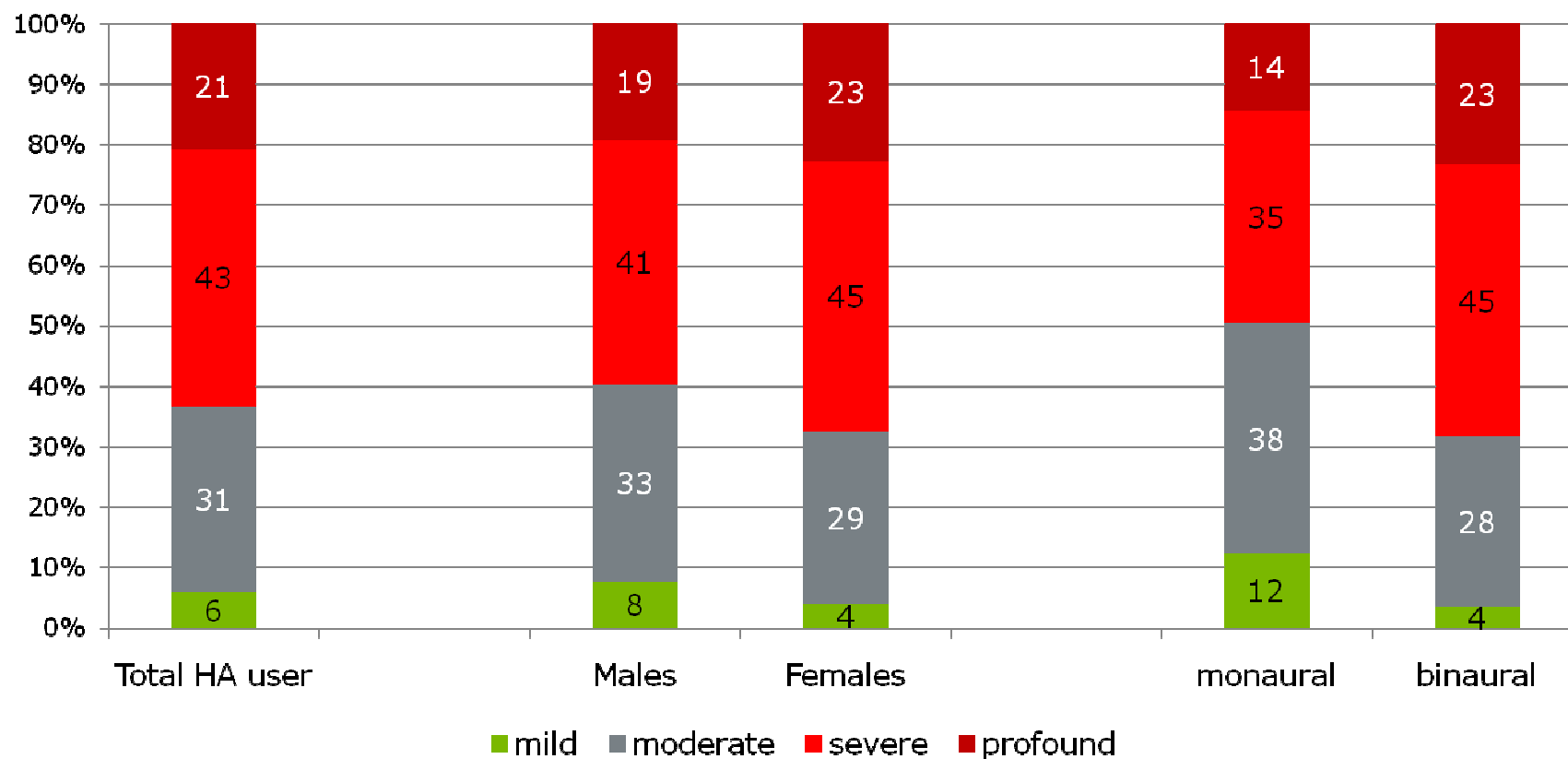
## **3. Analysis of hearing aid owners**

# Owners: Degree of hearing loss

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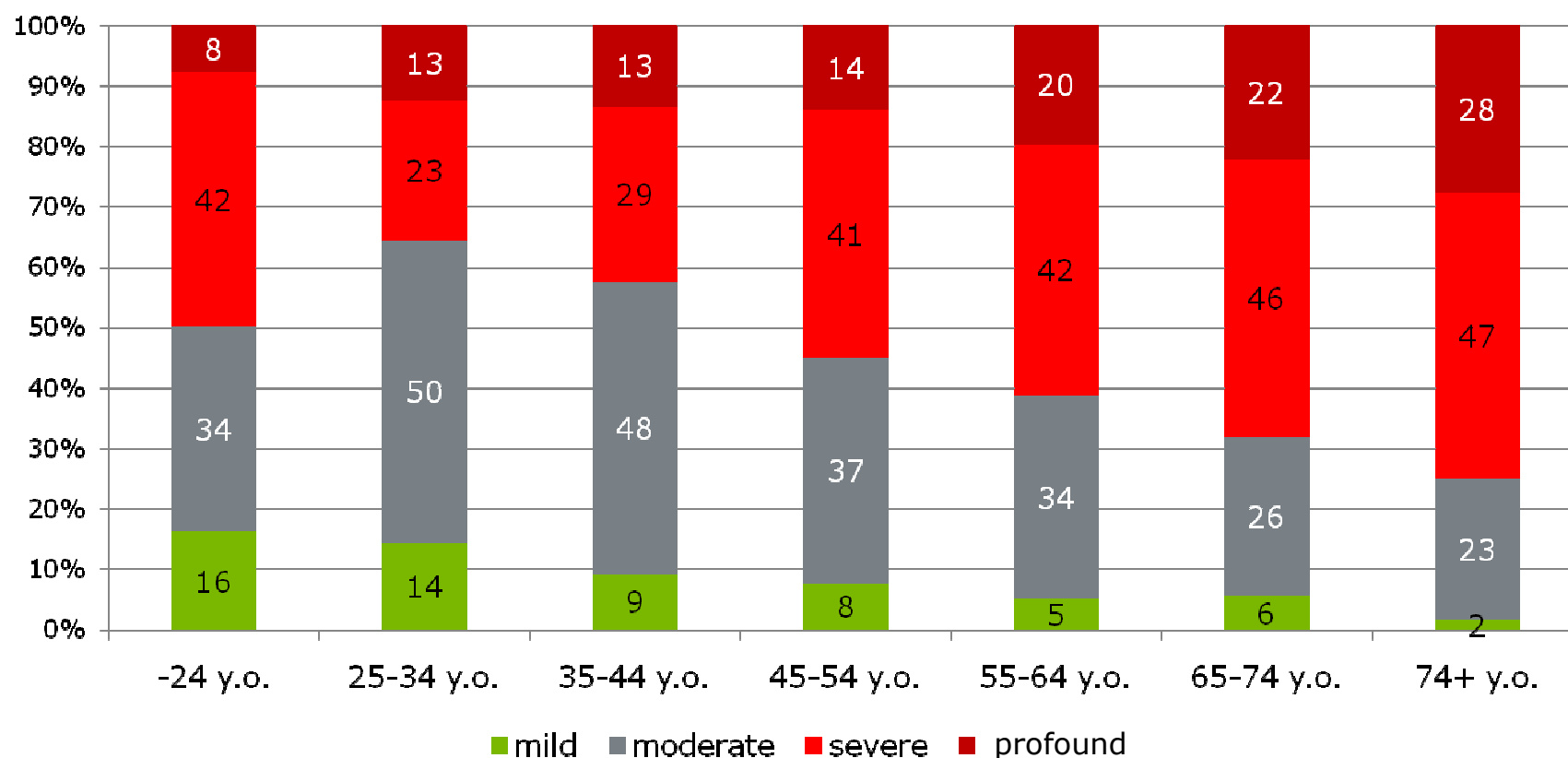


## Subjective hearing loss of HA-owners: 64% of all HA-owners have a severe or profound hearing loss



HA-owner, n=503

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



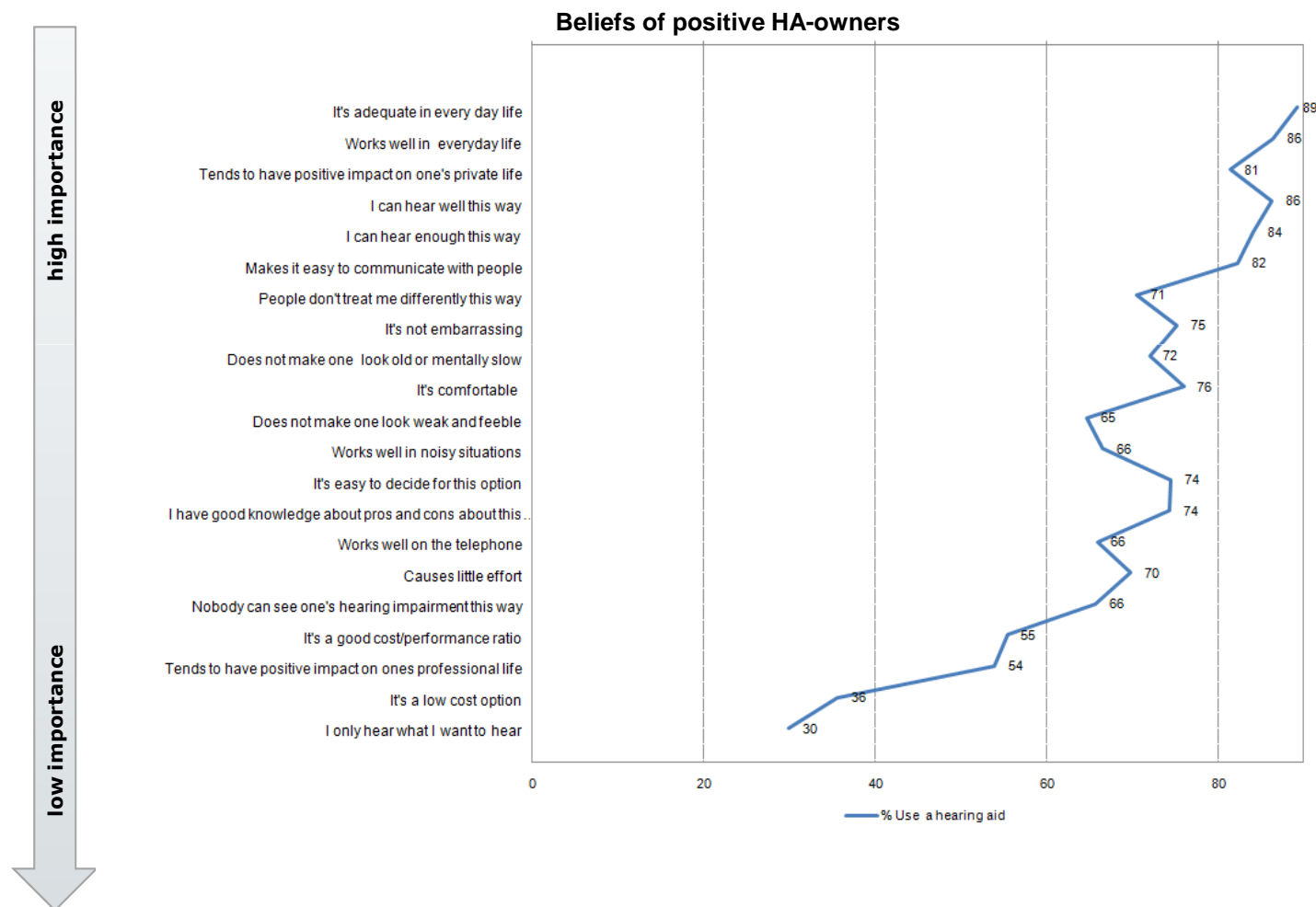
HA-owner, n=503



# Owners: Drivers of preference

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## 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.



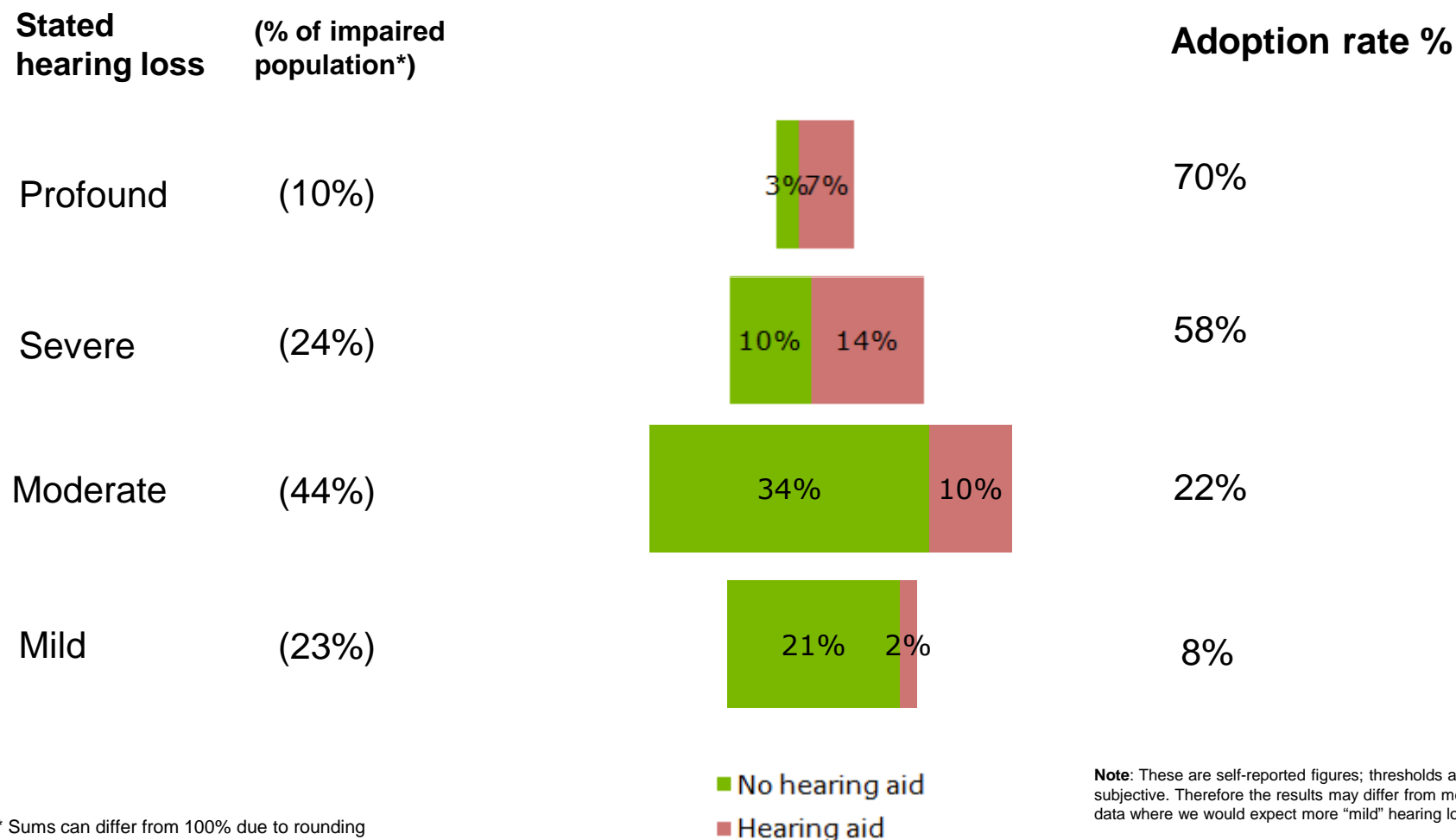
**Question:** There are different ways how to LIVE WITH HEARING LOSS. Please indicate which of the following statements applies to which option in your personal view.

**Read:** In this group, "It's adequate in every day life" is the most important criterion. 89% say that "use a hearing aid" is adequate in every day life.

# Hearing aid ownership and usage

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# Low adoption rates within mild and moderate hearing loss



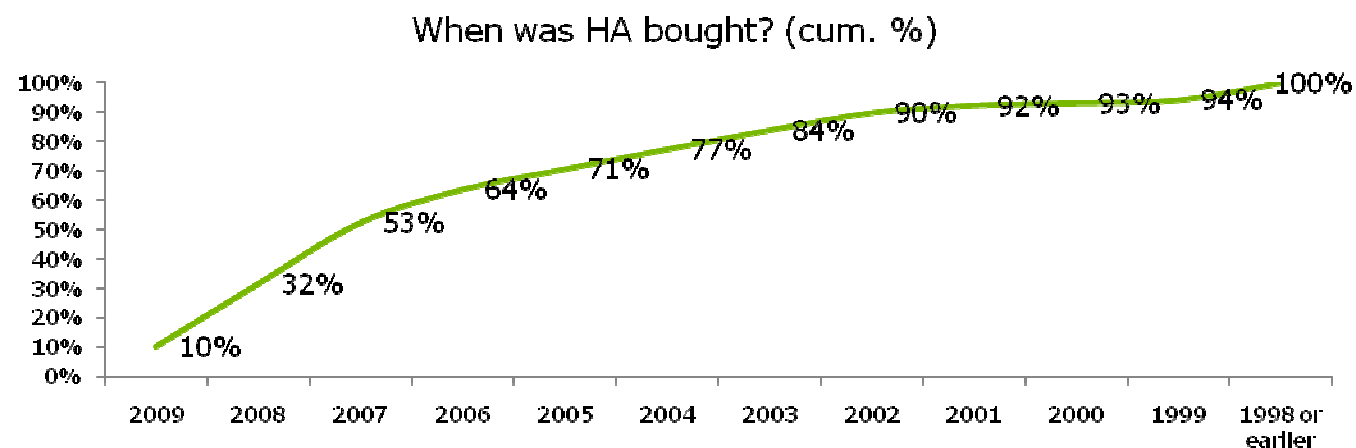
\* Sums can differ from 100% due to rounding

**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=1308

# More than 50% of the currently owned HAs were bought in 2007 or later.

NB: interviews carried out Summer 2009



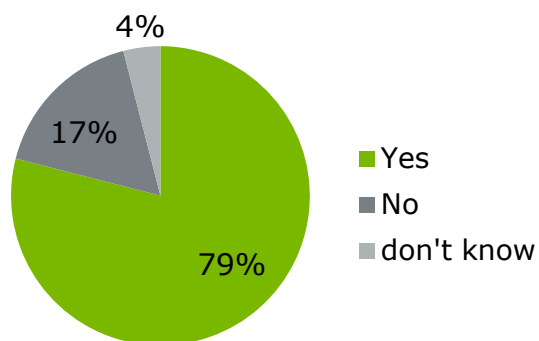
Age HA:  
Mean: 3.4 years

HA-owner, n=503

# 79% received some kind of 3<sup>rd</sup> party reimbursement

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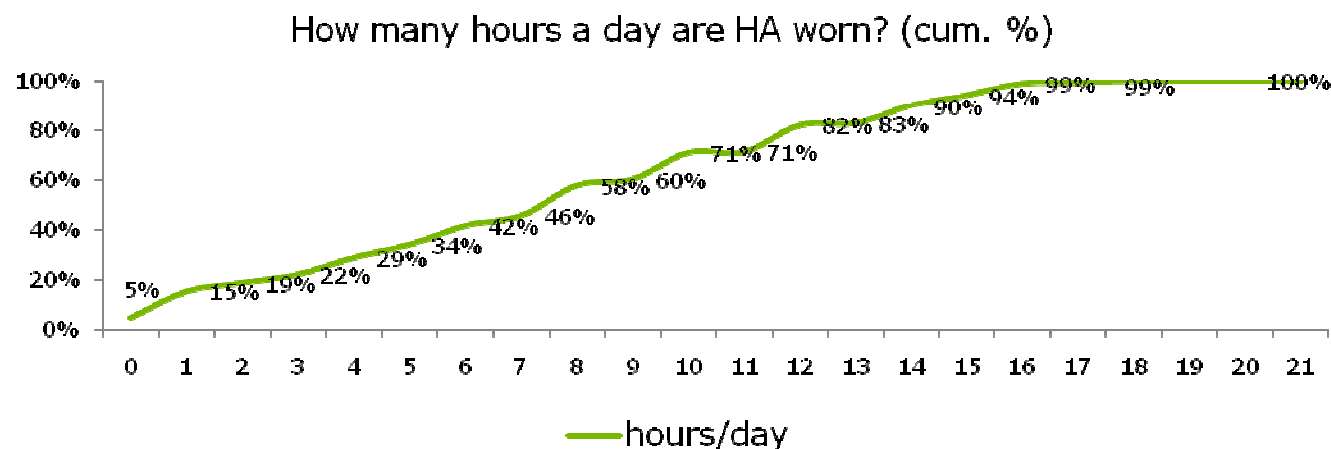
**Owners:** : Was any part or all of your hearing aid(s) paid for by a third party ?  
(Insurance, Government, ...)



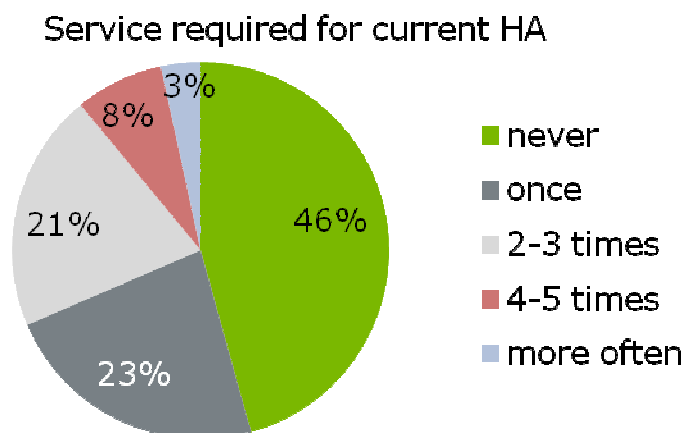
HA-owners, n=503



On average, HAs are worn 7.7 hours a day. 69% of the currently owned HAs either had no service need or only once.

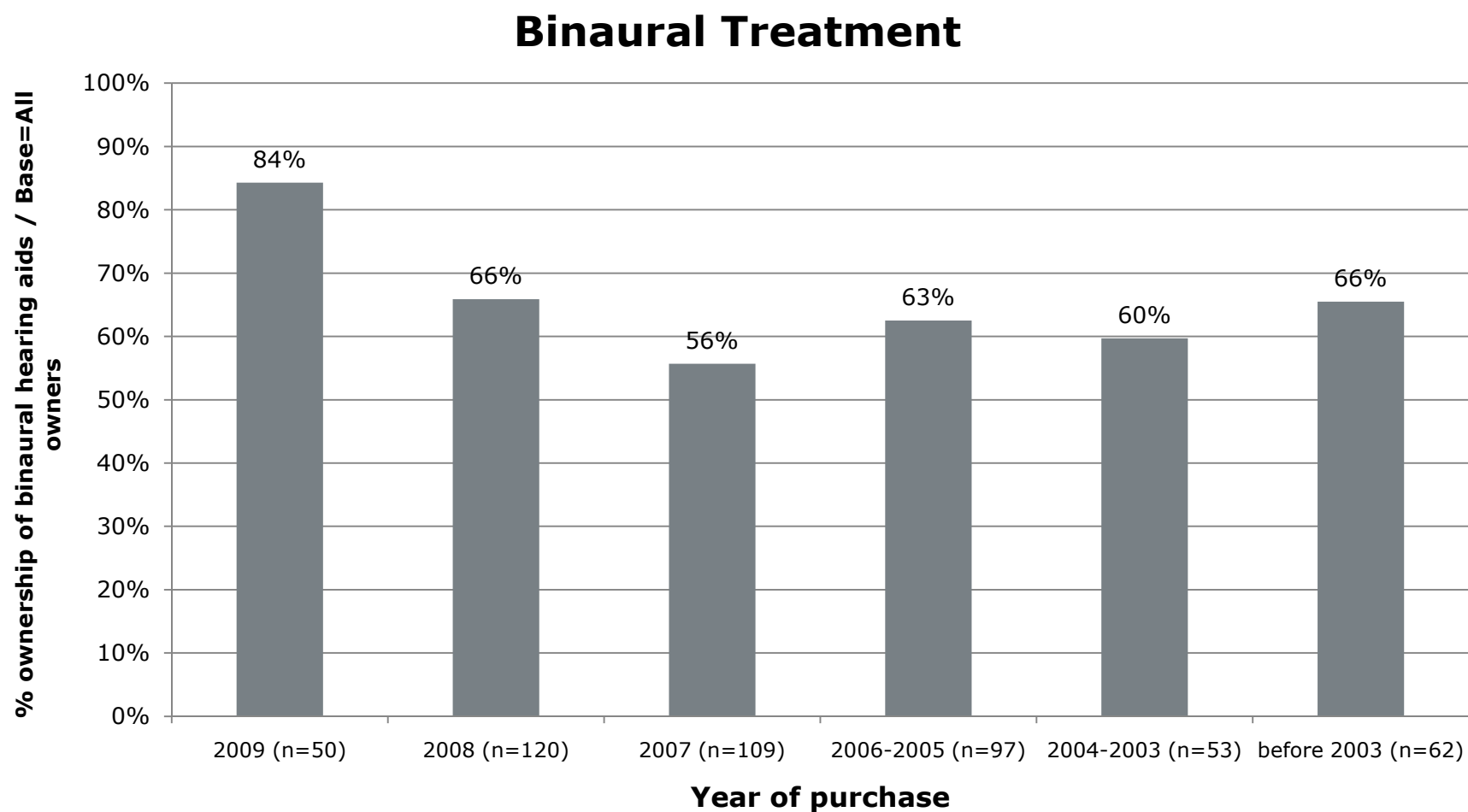


HA worn:  
Mean: 7.7 hours/day



HA-owner, n=503

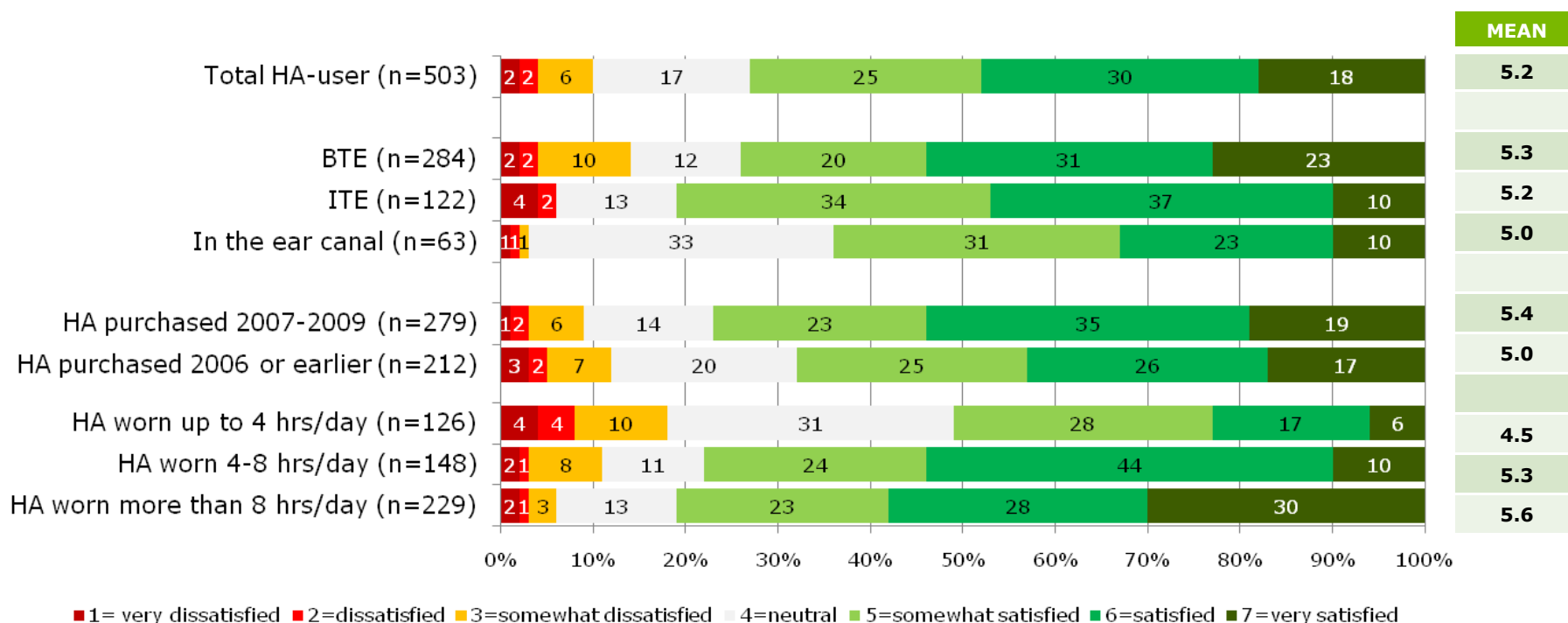
# Monaural-binaural treatment by purchase date



# Satisfaction with HAs

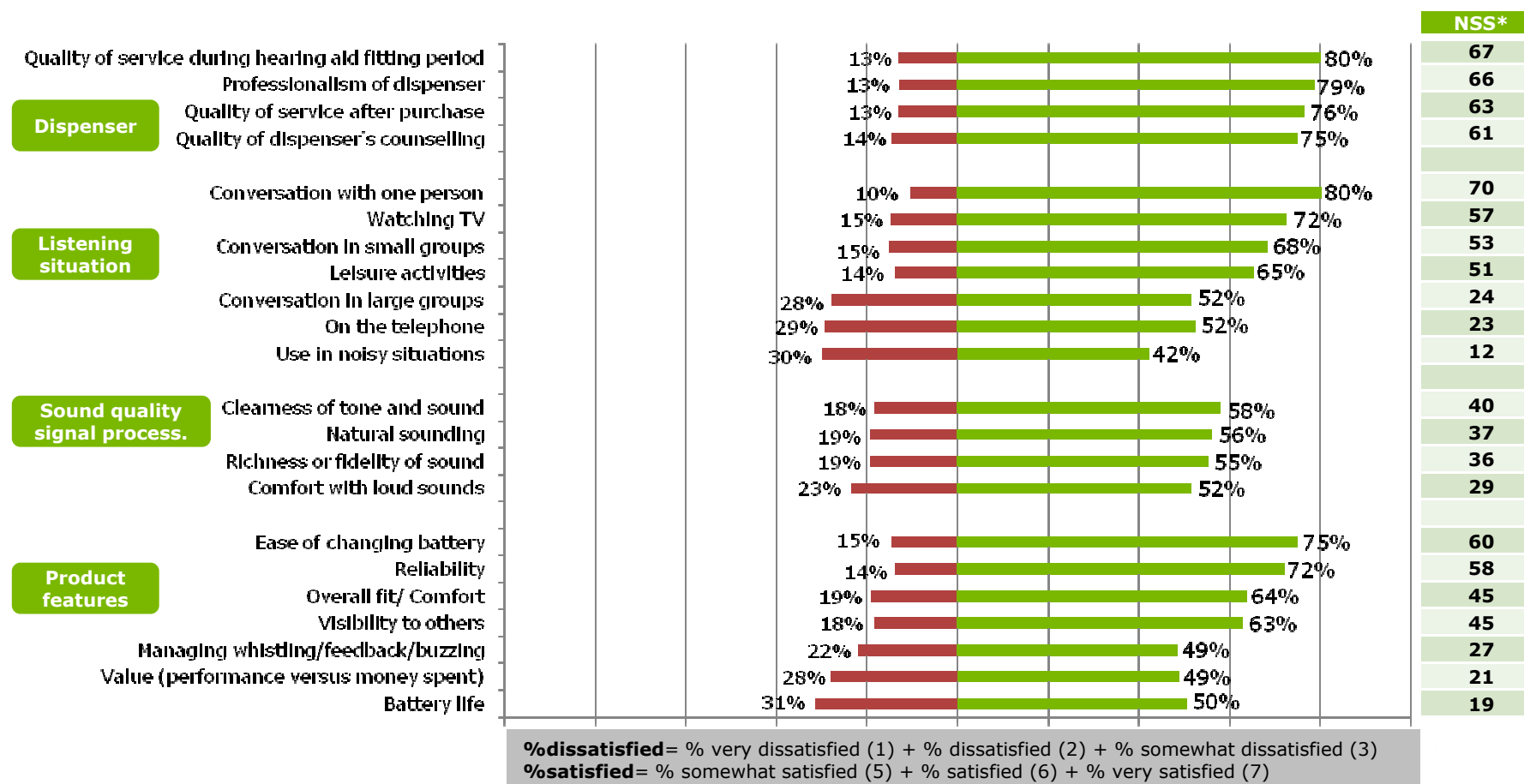
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Overall satisfaction with HA: Highest satisfaction for the following groups: BTEs, purchased 2007-2009 and worn more than 8 hours a day.



HA-owner, n=503

# Satisfaction with current HAs



\*NSS= Net Satisfaction Score (%satisfied – %dissatisfied)

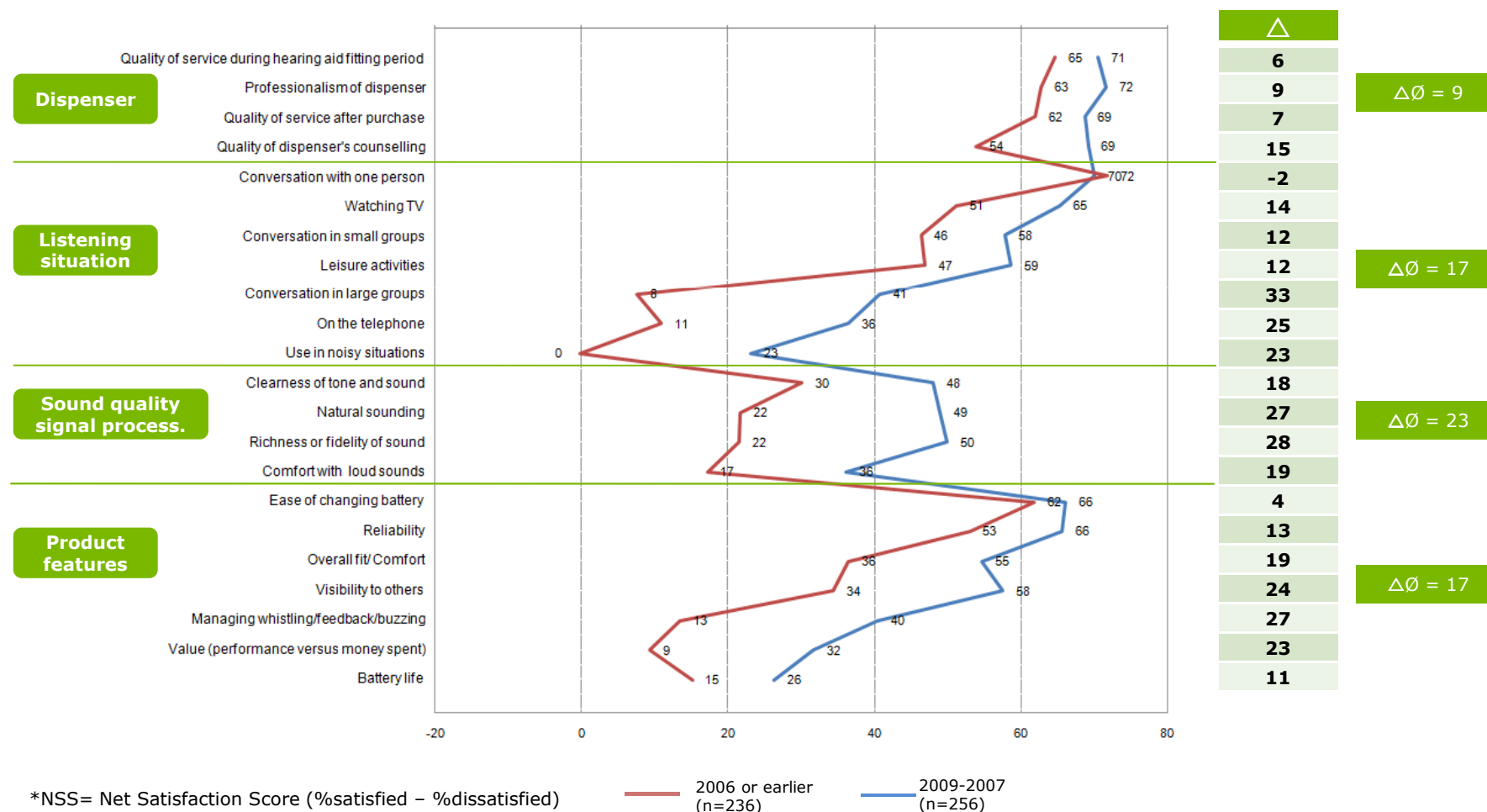
\* NSS can differ from showed difference due to rounding

■ dissatisfied ■ satisfied

HA-owner, n=503



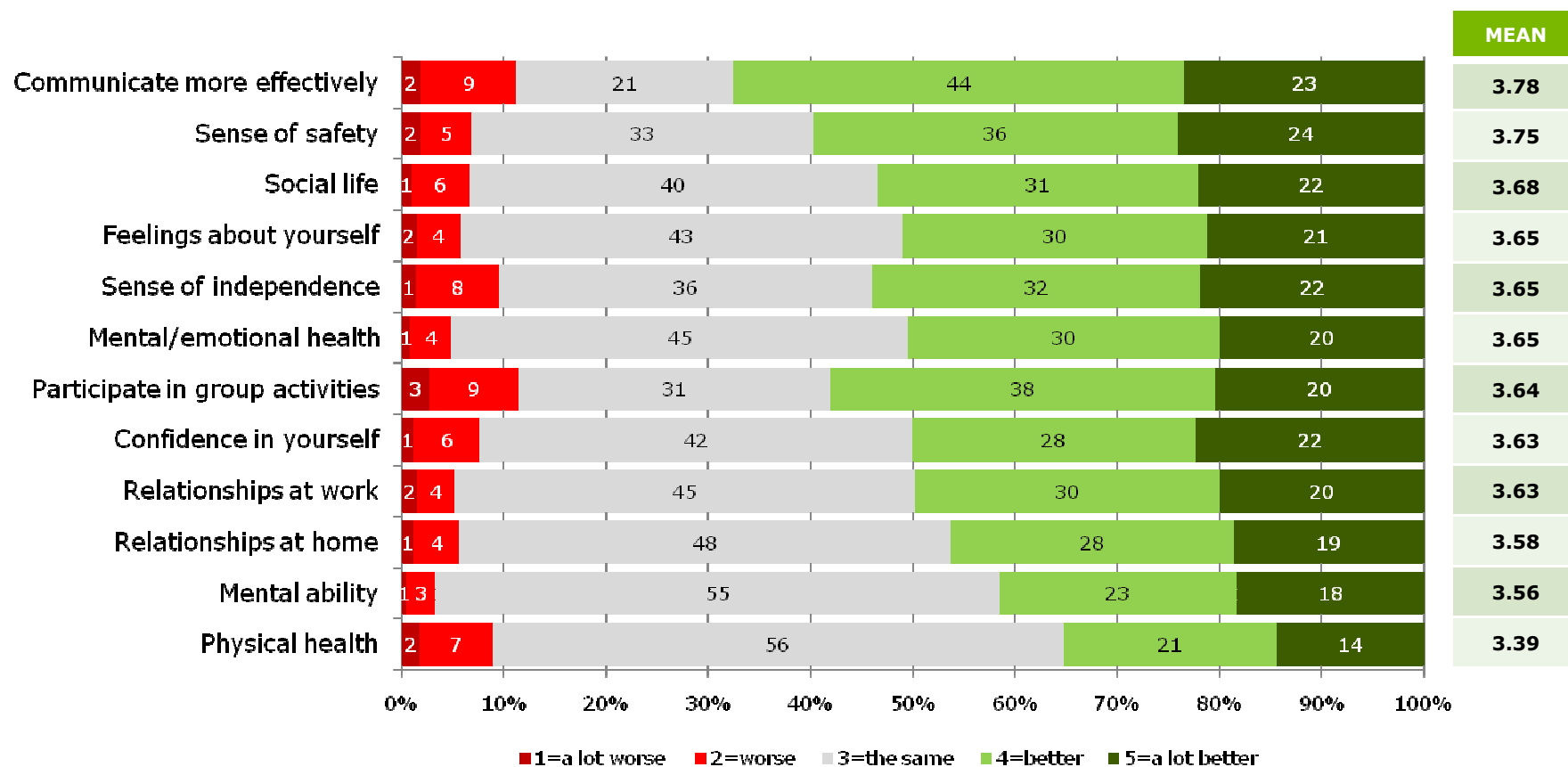
# Satisfaction with current HAs (NSS\*): HA purchased before 2007 vs. purchased 2007 or after



# Positive impact of HAs

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## Significant positive impact of HAs on different aspects – especially communication effectiveness and sense of safety have improved

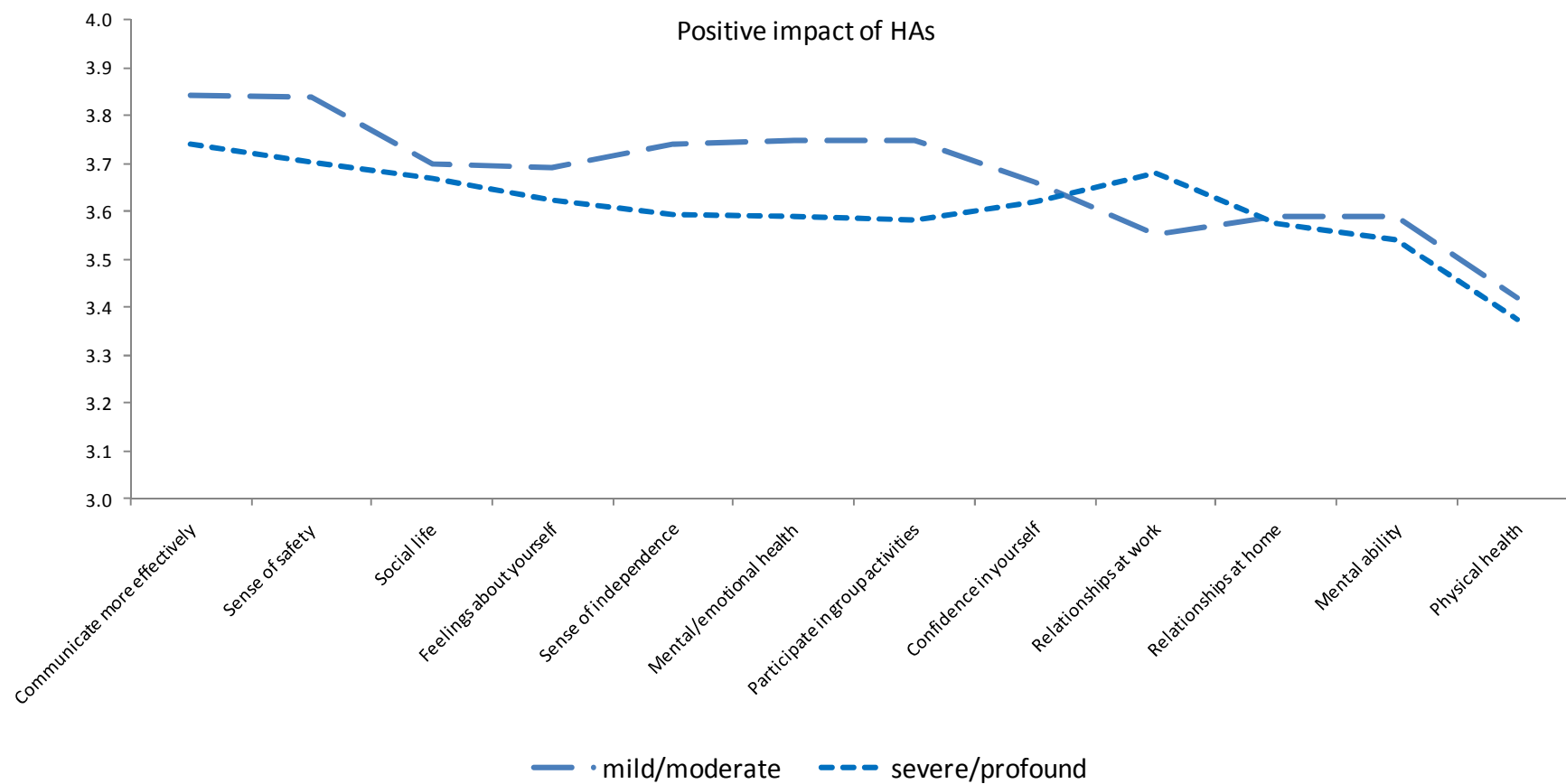


Sorted by descending mean

HA-owner, n=503



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



HA-owner, n=503

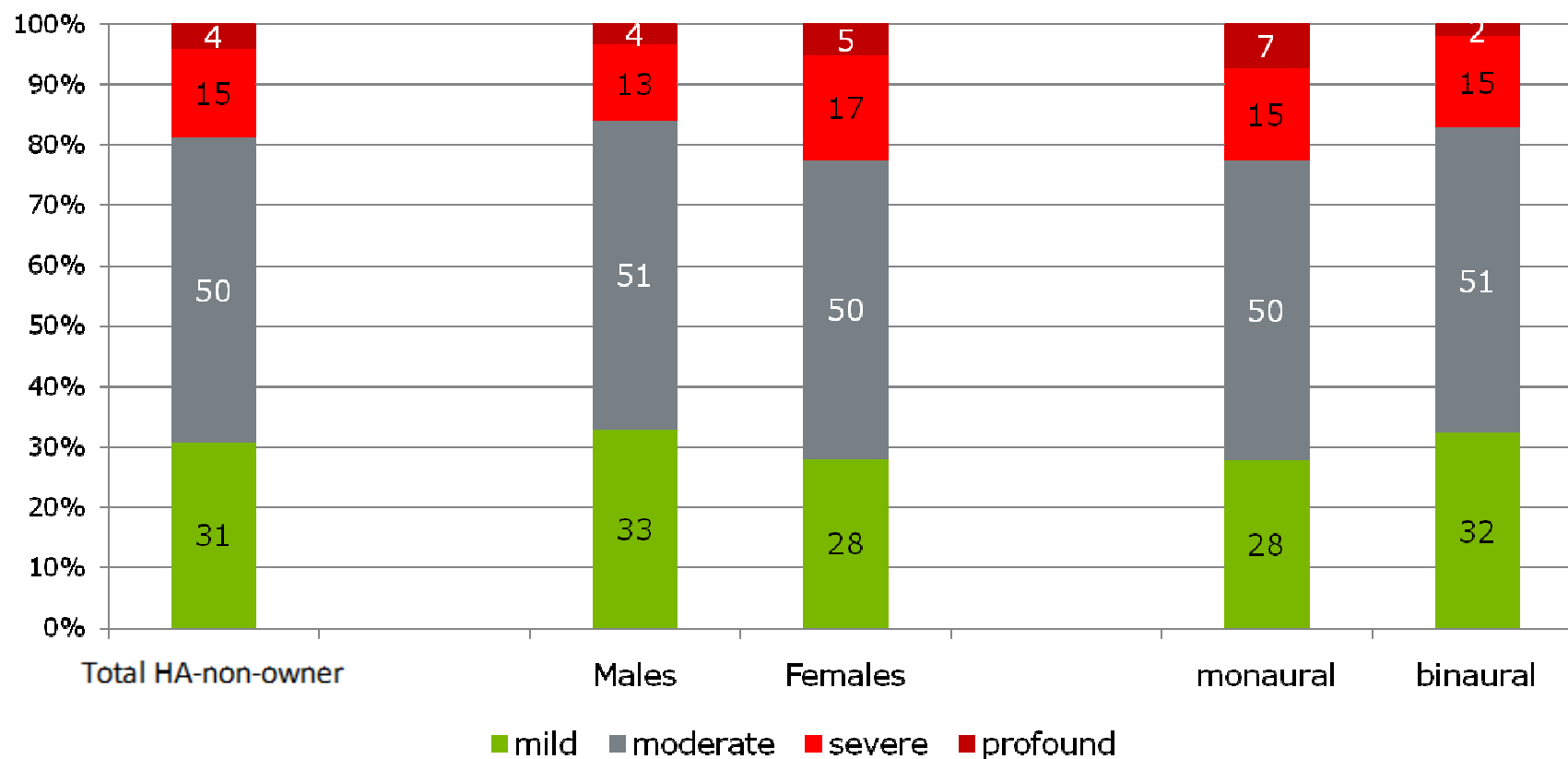
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## **4. Analysis of hearing impaired non-owners**

# Non-owners: Degree of hearing loss

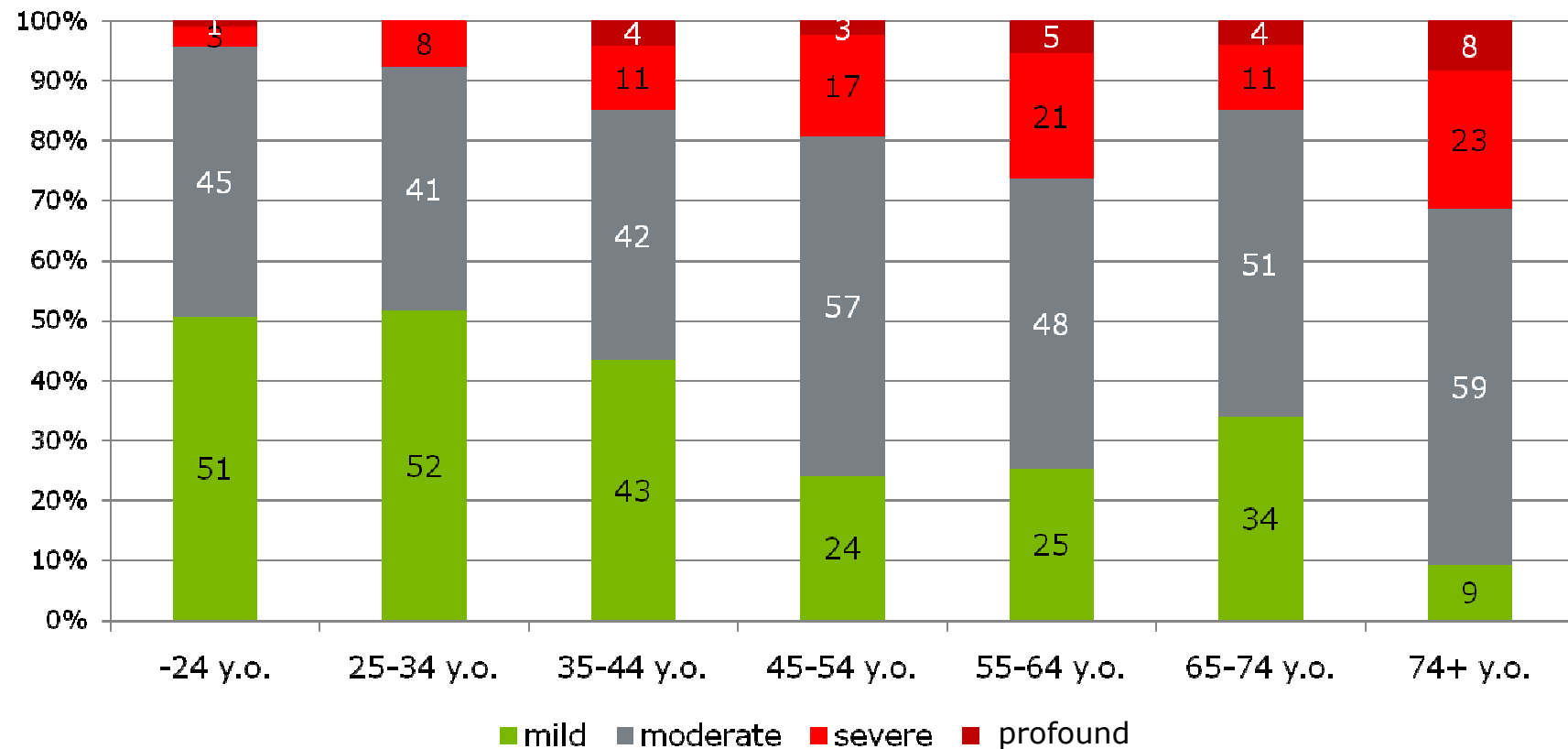
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# Subjective hearing loss of HA-non-owners: 1 out of 5 has a severe to profound hearing loss



HA-non-owner, n=805

# Subjective hearing loss of HA-non-owners by age: increase of severity is not linear

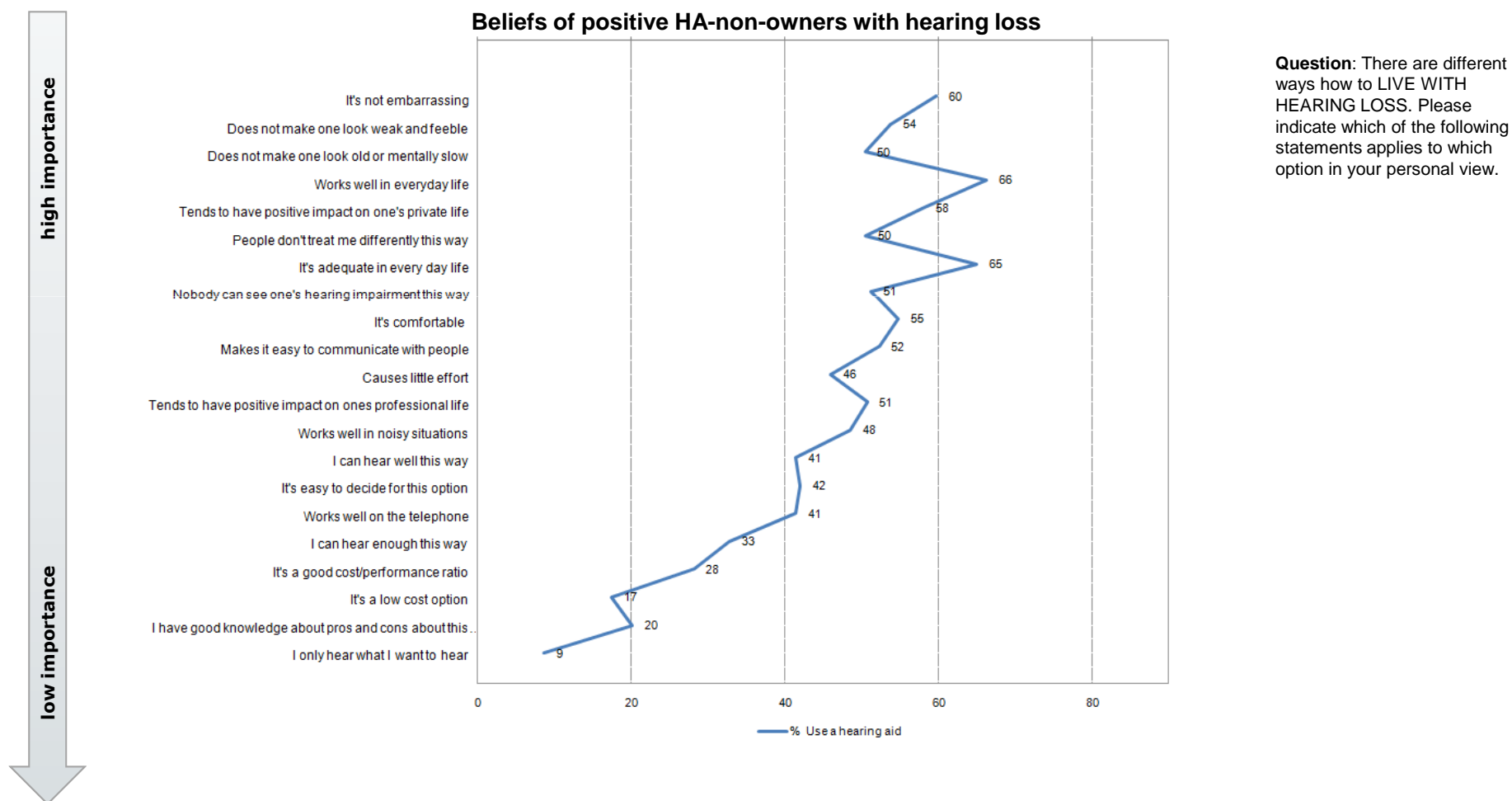


HA-non-owner, n=805

# Non-owners: Drivers

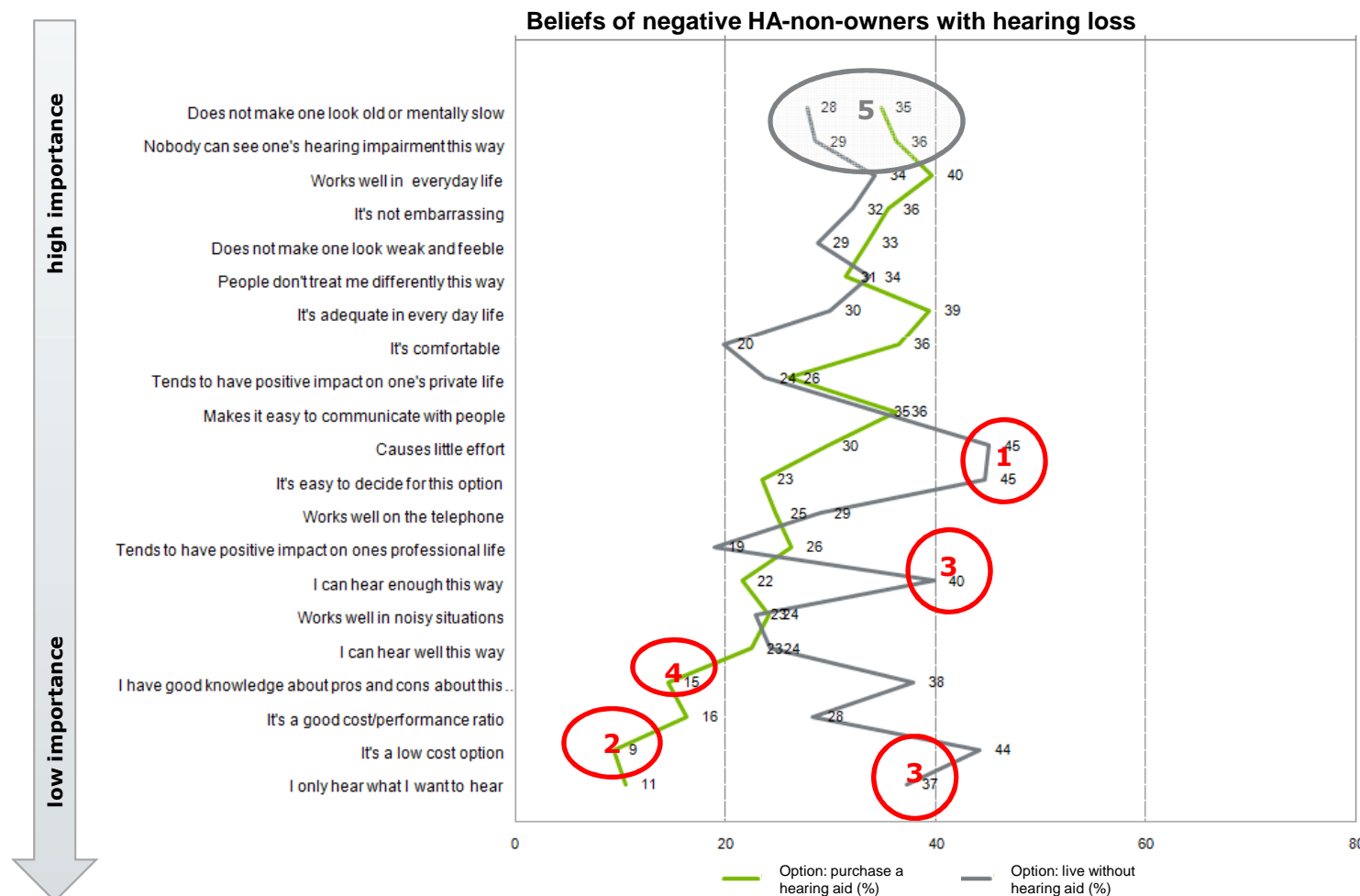
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**Beliefs of positive HA-non-owners:** They do not fear any stigma and agree about the clear advantages of hearing aids. Barriers to buy are: Costs/costs-performance, knowledge about HAs and that they believe that without HAs they only hear what they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



**Read:** In this group, "It's not embarrassing" is the most important criteria. 60% say that "use a hearing aid" is not embarrassing.

**Beliefs of negative/unavailable HA-non-owners:** Living without hearing aid causes little effort / no decision (1). Furthermore hearing aids are not cheap (2). These people think they hear enough without hearing aids (3) and furthermore they don't know a lot about hearing aids (4). These rational reasons are more dominant than emotional ones ("Stigma") (5).



**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, 45% say living with hearing loss without hearing aid causes little effort.

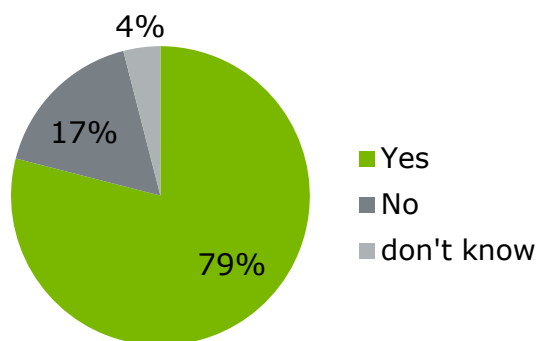


# Reasons not to use hearing aids

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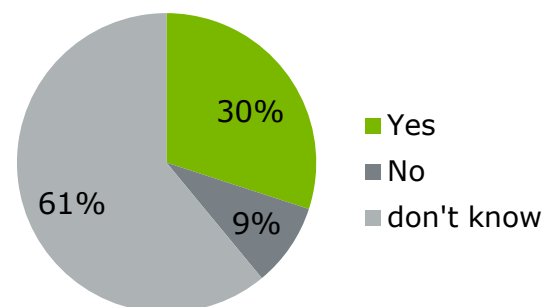
# Information deficit non-owners: 61% don't know whether insurance would pay

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



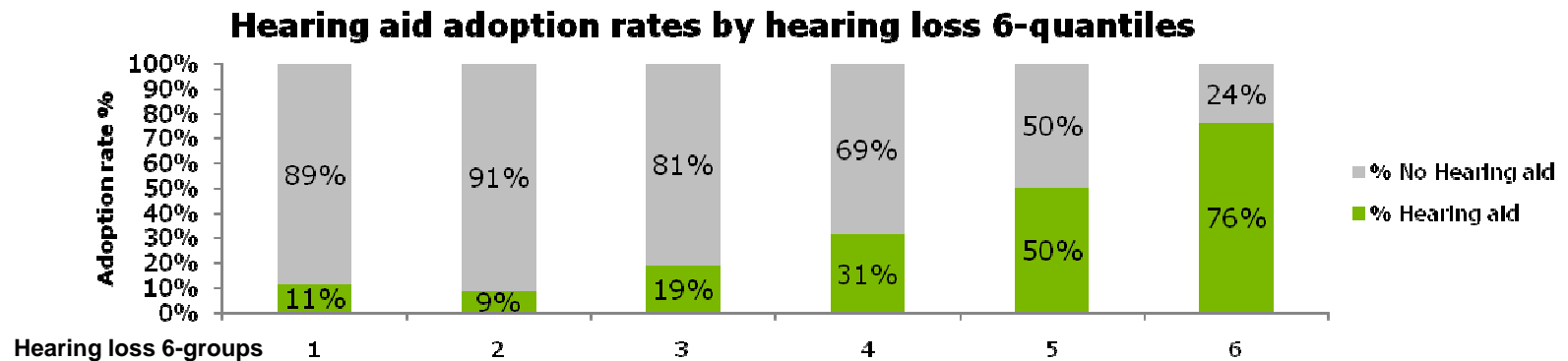
HA-owners, n=503

**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=805

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



HA-non-owner, n=805  
HA-owner, n=503

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:\*

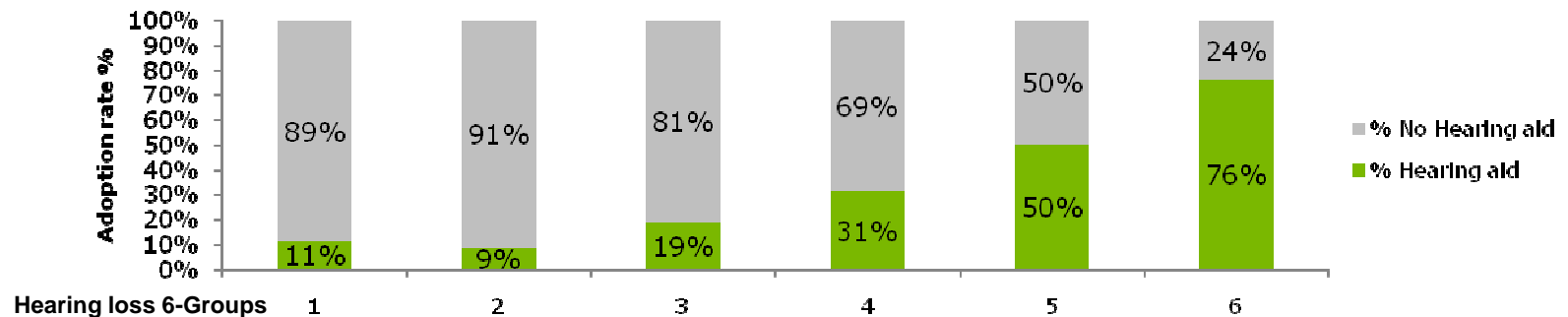
- Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
  - Scores on 6 APHAB-EC - like questions (Scaled 1-7)
  - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67%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



(1): People without HAs: Hearing loss does not seem 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

**People without Hearing aid**

	Mean	Mean	Mean	Mean	Mean	Mean
Commitment hearing aid	18	18	16	17	17	15
Commitment live without hearing aid	22	24	23	21	23	27

②

**People with Hearing aid**

	Mean	Mean	Mean	Mean	Mean	Mean
Commitment hearing aid	19	26	28	30	31	32
Commitment live without hearing aid	17	19	14	14	14	13

HA-non-owner, n=805  
HA-owner, n=503

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.

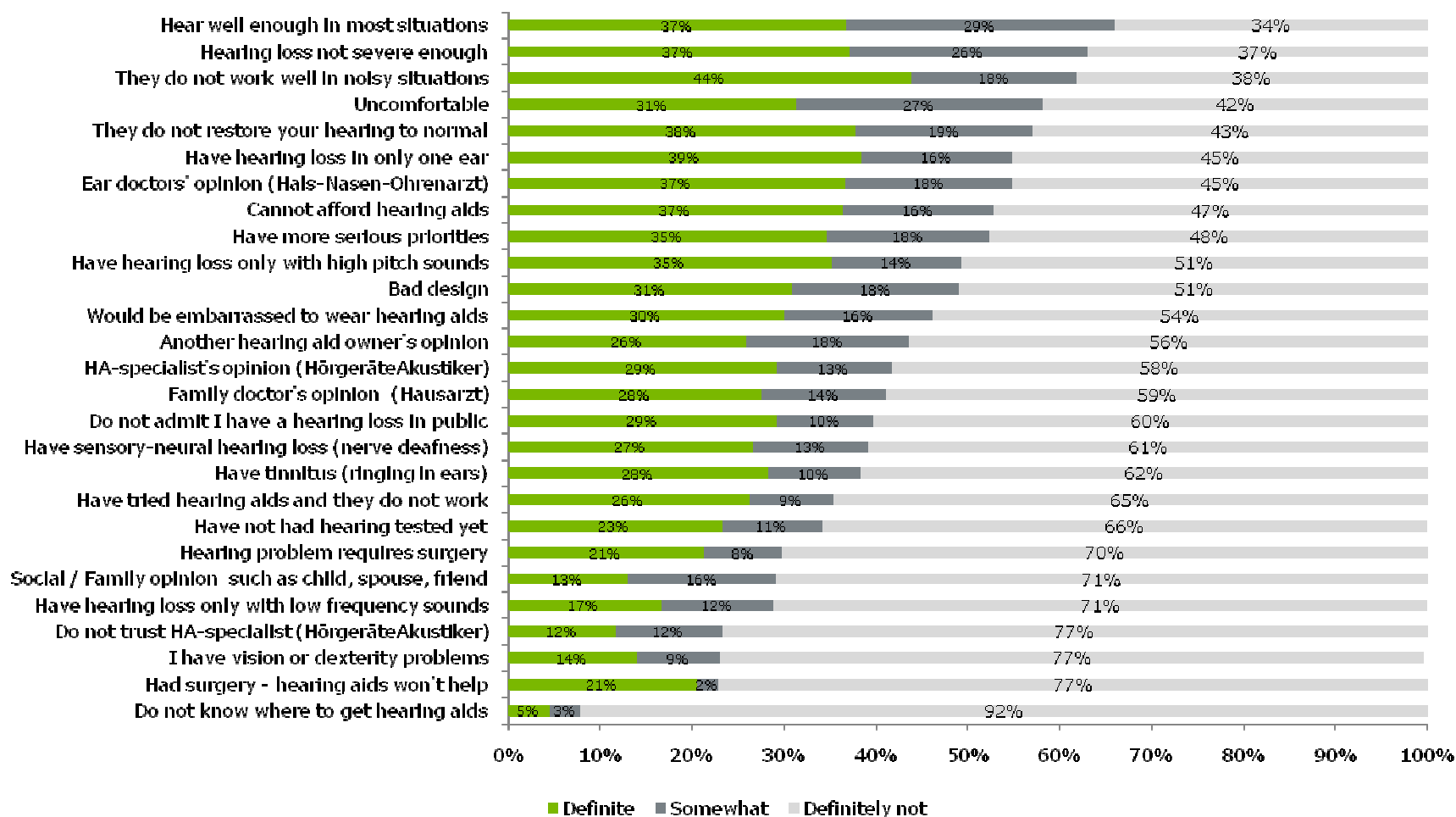


To analyse reasons of non-adoption we look at 6-groups 4-6 as the structure of hearing loss is more similar to that of HA owners

Hearing loss characteristics: Owners compared to non-owners

	% HA Owner (n=503)	%HA-Non- owner 1-3 6- groups	%HA-Non- owner 4-6 6- groups
<b>Ears impaired</b>			
Unilateral loss	25%	46%	39%
Bilateral loss	75%	54%	61%
<b>Perceived loss</b>		More similar hearing loss- structure	
Mild	6%	42%	9%
Moderate	31%	53%	44%
Severe	43%	4%	36%
Profound	21%	1%	11%

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



Non owners with more than mild HL 6-groups 4-6=273

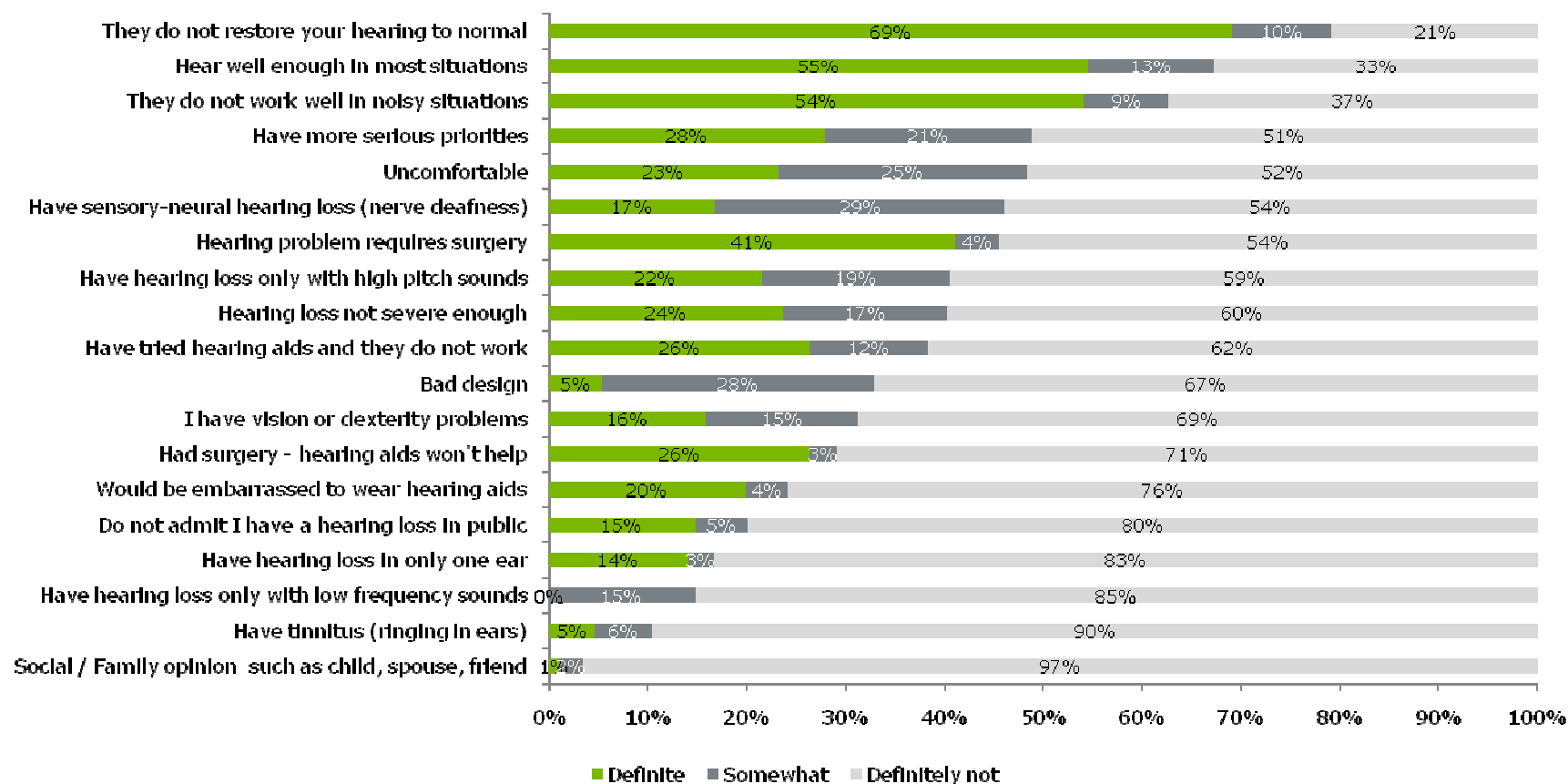


# Reasons not to own hearing aids

Base: Non-owners	Total population (n=805 unweighted)			4-6 6-groups (n =273 unweighted)		
Reason	Definitely not	Somewhat	Definite	Definitely not	Somewhat	Definite
Hear well enough in most situations	22%	27%	51%	34%	29%	37%
Hearing loss not severe enough	26%	24%	50%	37%	26%	37%
They do not work well in noisy situations	44%	21%	34%	38%	18%	44%
Uncomfortable	45%	24%	31%	42%	27%	31%
They do not restore your hearing to normal	45%	21%	34%	43%	19%	38%
Have hearing loss in only one ear	51%	19%	31%	45%	16%	39%
Ear doctor's opinion (Hals-Nasen-Ohrenarzt)	40%	19%	41%	45%	18%	37%
Cannot afford a hearing aid	50%	15%	35%	47%	16%	37%
Have more serious priorities	44%	21%	35%	48%	18%	35%
Have hearing loss only with high pitch sounds	51%	20%	29%	51%	14%	35%
Bad design	57%	18%	25%	51%	18%	31%
Would be embarrassed to wear a hearing aid	58%	18%	24%	54%	16%	30%
Another hearing aid owner's opinion	56%	23%	21%	56%	18%	26%
HA-specialist's opinion (HörgeräteAkustiker)	51%	17%	32%	58%	13%	29%
Family doctor's opinion (Hausarzt)	52%	19%	28%	59%	14%	28%
Do not admit I have a hearing loss in public	59%	17%	24%	60%	10%	29%
Have sensory-neural hearing loss (nerve deafness)	65%	15%	19%	61%	13%	27%
Have tinnitus (ringing in ears)	57%	12%	31%	62%	10%	28%
Have tried hearing aids and they do not work	69%	12%	19%	65%	9%	26%
Have not had hearing tested yet	59%	12%	29%	66%	11%	23%
Hearing problem requires surgery	71%	13%	16%	70%	8%	21%
Social / Family opinion such as child, spouse, friend	68%	17%	15%	71%	16%	13%
Have hearing loss only with low frequency sounds	67%	13%	20%	71%	12%	17%
Do not trust HA-specialist (HörgeräteAkustiker)	76%	12%	13%	77%	12%	12%
I have vision or dexterity problems	72%	11%	17%	77%	9%	14%
Had surgery - hearing aids won't help	78%	7%	15%	77%	2%	21%
Do not know where to get hearing aids	87%	6%	7%	92%	3%	5%



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



Owners who don't use, n=25

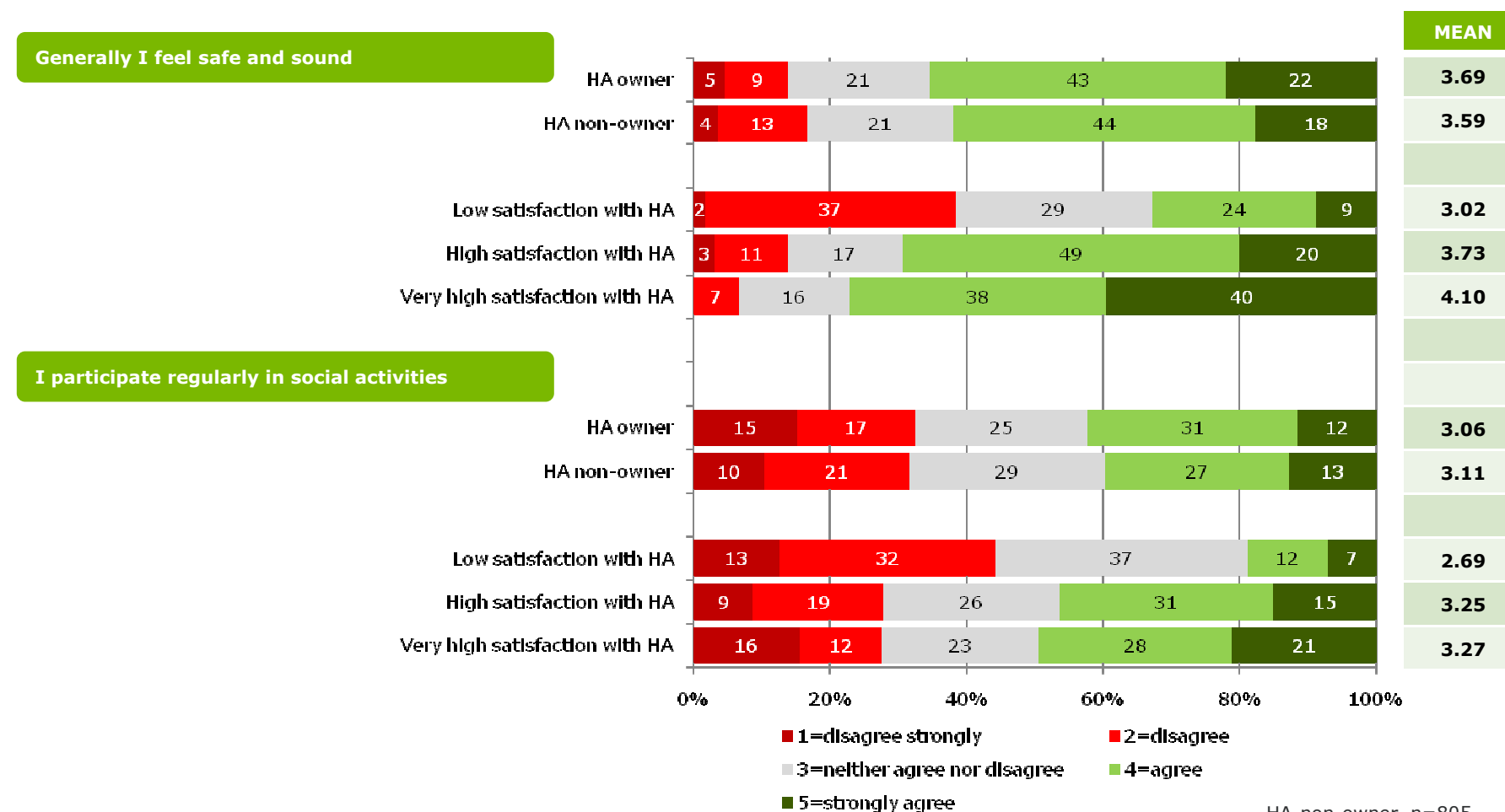




# Negative impact of hearing loss

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



HA-non-owner, n=805  
HA-owner, n=503



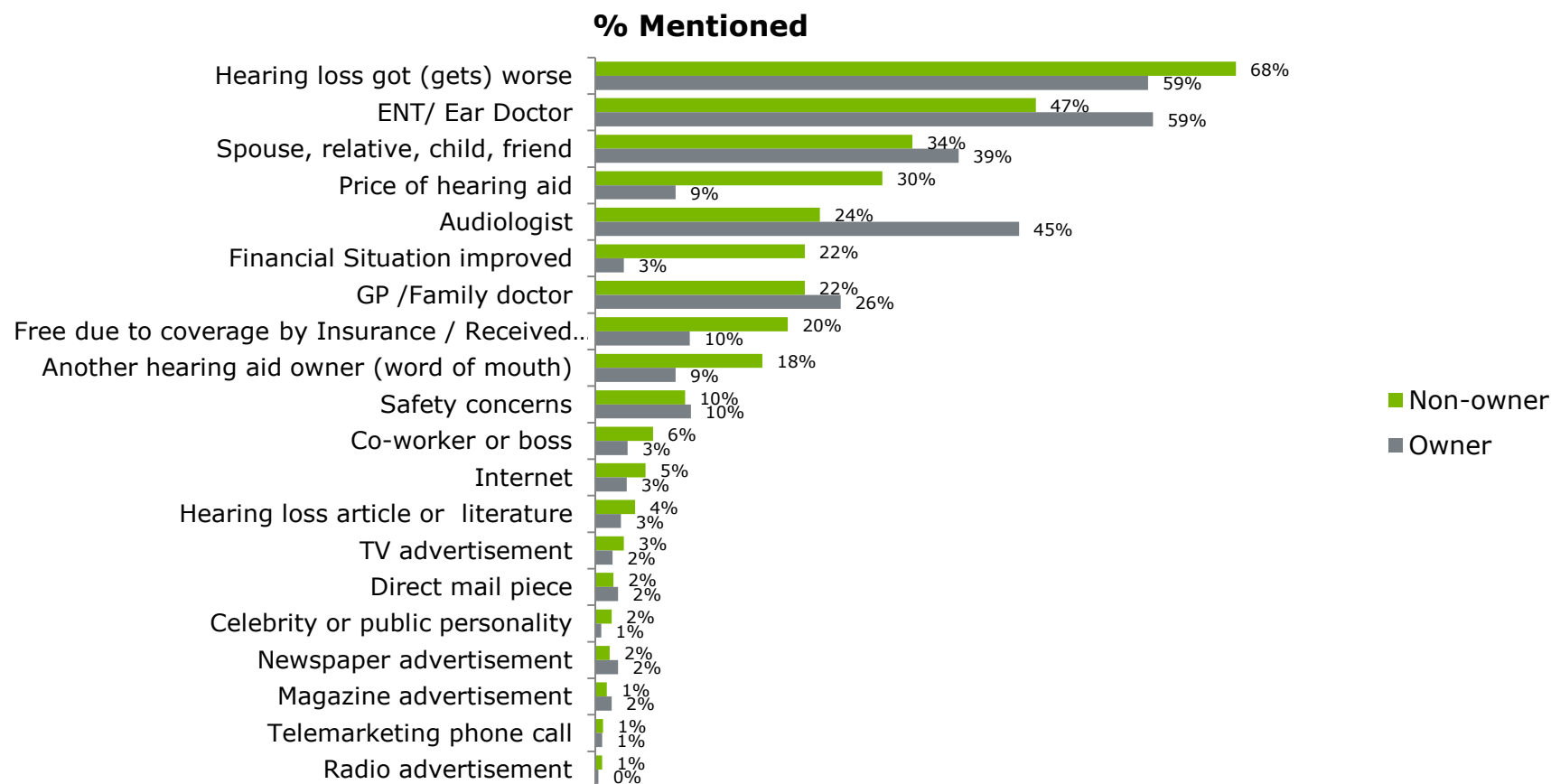
# Acquiring intentions

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What non-owners say would influence them is not necessarily what owners say influenced them to acquire hearing aids. The most important influencing factors are worse hearing loss, 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 ?





**Stefan Ruf** lic. rer. pol.

Anovum GmbH  
Sumatrastrasse 25  
CH-8006 Zürich

Telefon +41 (0)44 576 76 77  
Mobil +41 (0)78 717 88 01  
Email [stefan.ruf@anovum.com](mailto:stefan.ruf@anovum.com)

[www.anovum.com](http://www.anovum.com)



**Christian Egger** lic. phil.

Anovum GmbH  
Sumatrastrasse 25  
CH-8006 Zürich

Telefon +41 (0)44 576 76 78  
Mobil +41 (0)76 318 57 51  
E-Mail [christian.egger@anovum.com](mailto:christian.egger@anovum.com)

[www.anovum.com](http://www.anovum.com)



EHIMA  
European Hearing Instrument  
Manufacturers Association

**EHIMA:**

Soeren Hougaard  
EHIMA executive director  
Phone: (+45) 4045 7135  
Email: [sh@ehima.com](mailto:sh@ehima.com)

