

## Results

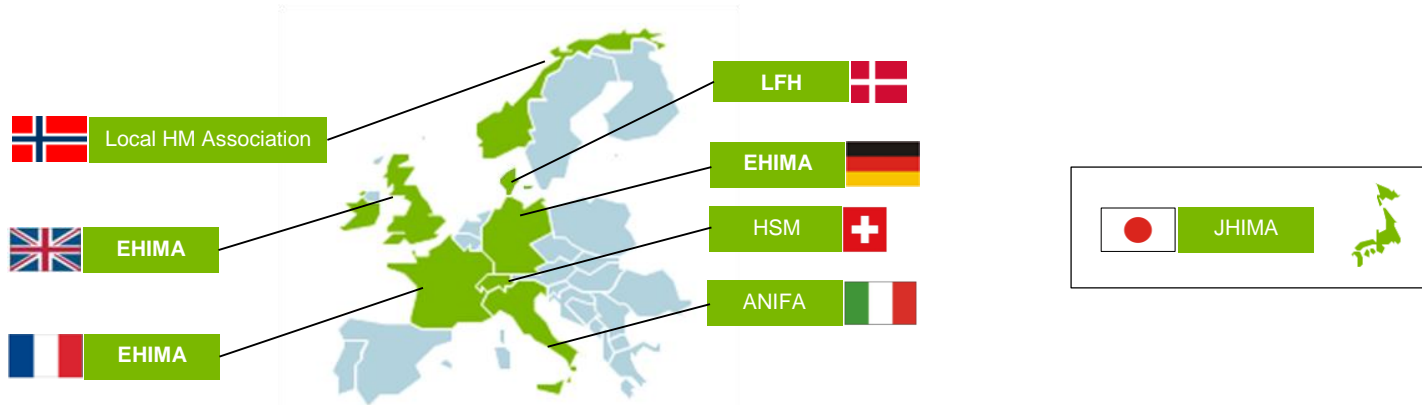
# EuroTrak Switzerland 2015

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

# Summary

## 1. Introduction

- EuroTrak Switzerland 2015 was designed and executed by Anovum (Zurich) on behalf of HSM Switzerland. It is designed as a follow-up study of EuroTrak Switzerland 2012.
- Sample sizes Switzerland 2015:
  - Representative sample (sample 1): n=14'570 people
  - Hearing impaired (sample 2): n=1'301 people
    - Hearing impaired non-owners: n=682 people with hearing loss (**HL**)
    - HA owners: n=619 people with hearing aid (**HA**)
- EuroTrak Switzerland 2015 is part of the EuroTrak studies:



# Summary

## 2. Market overview

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- Stated hearing loss prevalence
  - Total: 8.0 %, 18+: 9.5% (2012: 8.8%, 18+: 10.5%).
  - Binaural hearing loss: HA owners: 86%, HA non-owners: 57%.
  - Hearing Tests: 35% (2012: 39%) had a hearing test in the last 5 years, most tests done by family doctors
- Hearing aid adoption rate (HA penetration)
  - Total: 41.4% (2012: 38.8%).
  - Total age group 18+: 41.9% (2012: 39.1 %).
  - 72% of HA owners have binaural treatment.
- The route to the hearing aid
  - 74% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 48% got hearing aids recommended from the ENT or family doctor (drop out rate=35% / 2012: 39%).
  - 65% (2012:59%) of the GP consultations referred to an ENT. 17% (2012: 22%) recommended no action.
  - 41% of ENT consultations referred to a audiologist, 36% (2012: 41%) 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.
  - While quality of sleep tends to be lower for hearing impaired – it seems to improve if hearing impaired use hearing aids.

# Summary

## 3. Analysis of hearing aid owners

- Hearing aid ownership and usage, accessories and Telecoil
  - 81% (2012: 89%) of all HA owners asked some kind of 3<sup>rd</sup> party reimbursement.
  - 34% of the currently owned HAs were bought in the last two years (EuroTrak 2012: 50%)
  - The average age of the currently owned HAs is 3.8 years (2012: 3.1 years).
  - The median age of hearing aids before replacement is 6 years.
  - On average, HAs are worn 9 hours a day (2012: 8.3).
  - 77% of today's hearing aid owners are aware of their hearing aid brand, 43% would preferably choose the same brand if they would plan to obtain new hearing aids.
  - TV Box is the most often owned electronic accessory: 10 % of hearing aid owners have one – 42% have heard of it but don't own one.
  - 26% of hearing aid owners know what Telecoil is but only 8% have used it – mainly in a church. Most of those who use it are satisfied.
- Importance of listening situations and satisfaction with HAs
  - 80% of the hearing aid owners say their hearing aid works better or as expected
  - 81% (2012:84%) of the HA owners are satisfied with their HAs.
  - The more hours worn per day, the higher the satisfaction.
  - Satisfaction with newer hearing aids is higher than with older hearing aids.
  - While talking at home (family members/phone) are very frequent important situations, experiences in specific situations (classroom/children) drive satisfaction with the hearing aid most.
- Positive impact of HAs
  - Significant positive impact of HAs on different aspects – especially communication, participation in group activities and sense of safety.
  - 99% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

# Summary

## 4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
  - Information deficit non-owners: 39% don't know whether insurance would pay, 15% assume they don't pay.
  - The main reasons for not using hearing aids are that people say they hear well enough, they do not work well in noisy situations and their hearing loss was not severe enough.
  - 2% who own HAs don't use them at all; 12% use them less than one hour/day. Main reasons for this are: "They do not work well in noisy situations", "uncomfortable" and "HL is not severe enough".
  
- Social rejection, buying intentions and triggers to buy
  - 95% of hearing aid owners think people don't 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.
  - The most important influencing factors for getting hearing aids are worsening hearing loss, ENT and spouse. Insurance coverage/price of hearing aids is only relevant for the non owners.
  - 11% (2012: 7%) of non-owners intend to get a hearing aid within the next year.

# Summary

## 5. Switzerland-specific questions

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- Image
  - Image of the hearing healthcare industry in Switzerland is mainly positive: only 4% of the people have a negative image
  - HA owners have an even better image of the hearing healthcare industry
  - 39% state that the overall image of the hearing healthcare industry in Switzerland got better
  - The image of the audiologists is better than the image of the manufacturers among HA owners (general population rates those 2 groups equally)
- New compensation system
  - The awareness of the new compensation system is much higher among HA owners (60% vs. 25% among non owners) – but lower compared to 2012.
  - The majority of hearing impaired people disapproves of most of the cost saving activities which come with the new compensation system

## Results

# EuroTrak Switzerland 2015

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# Detailed Results: Roadmap

**New topics for EuroTrak 2015 are highlighted in red**

## 1. Introduction

- Organisation of EuroTrak 2015
- 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 and dementia symptoms, **sleep quality**

## 3. Analysis of hearing aid owners

- Hearing aid ownership, **awareness of hearing loss before getting hearing aids**, lifetime of hearing aids and usage
- **Awareness and usage of accessories and Telecoil**
- Satisfaction with hearing aids and drivers
- **Importance of listening situations**
- Positive impact of hearing aids, **quality of life**

## 4. Analysis of hearing impaired non-owners

- Reasons for not having hearing aids and **why some people can consider hearing aids as uncomfortable**
- **Social rejection because of hearing loss compared to the acceptance of hearing aids**
- Buying intentions and **most important triggers to buy**

## 5. Switzerland-specific questions

- Image of the hearing healthcare industry in Switzerland
- New compensation system

## 6. Appendix

- Demographics: Hearing instrument adoption rates and populations



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# 1. Introduction

# Organisation of EuroTrak 2015

## Organisation

- Principal of the project EuroTrak Switzerland is HSM (Hearing System Manufacturers).
- Anovum Zurich 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.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire.

## Use of the data

- HSM (Hearing System Manufacturers) and EHIMA may use the anonymous data (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 HSM (Hearing System Manufacturers) uses 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 – Switzerland/[year]/n=[relevant sample size]”**
- Any member of HSM (Ansavox AG, Bernafon AG, FIMIC, GN ReSound AG, Oticon SA, Phonak AG, Siemens Audiologie AG, Widex Hörgeräte AG) can ask Anovum to further analyse the raw data in specific ways at their own expense.
- HSM companies can order a report with satisfaction scores for their brand. The other brands will be shown as benchmarks without denomination (brand A, brand B etc.). The report will show all satisfaction values. It is not allowed to communicate any information from these reports outside the HSM company.

# 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 panellist pools of more than 40'000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=14'570** 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=682** hearing aid owners and **n=619** hearing impaired non-owners

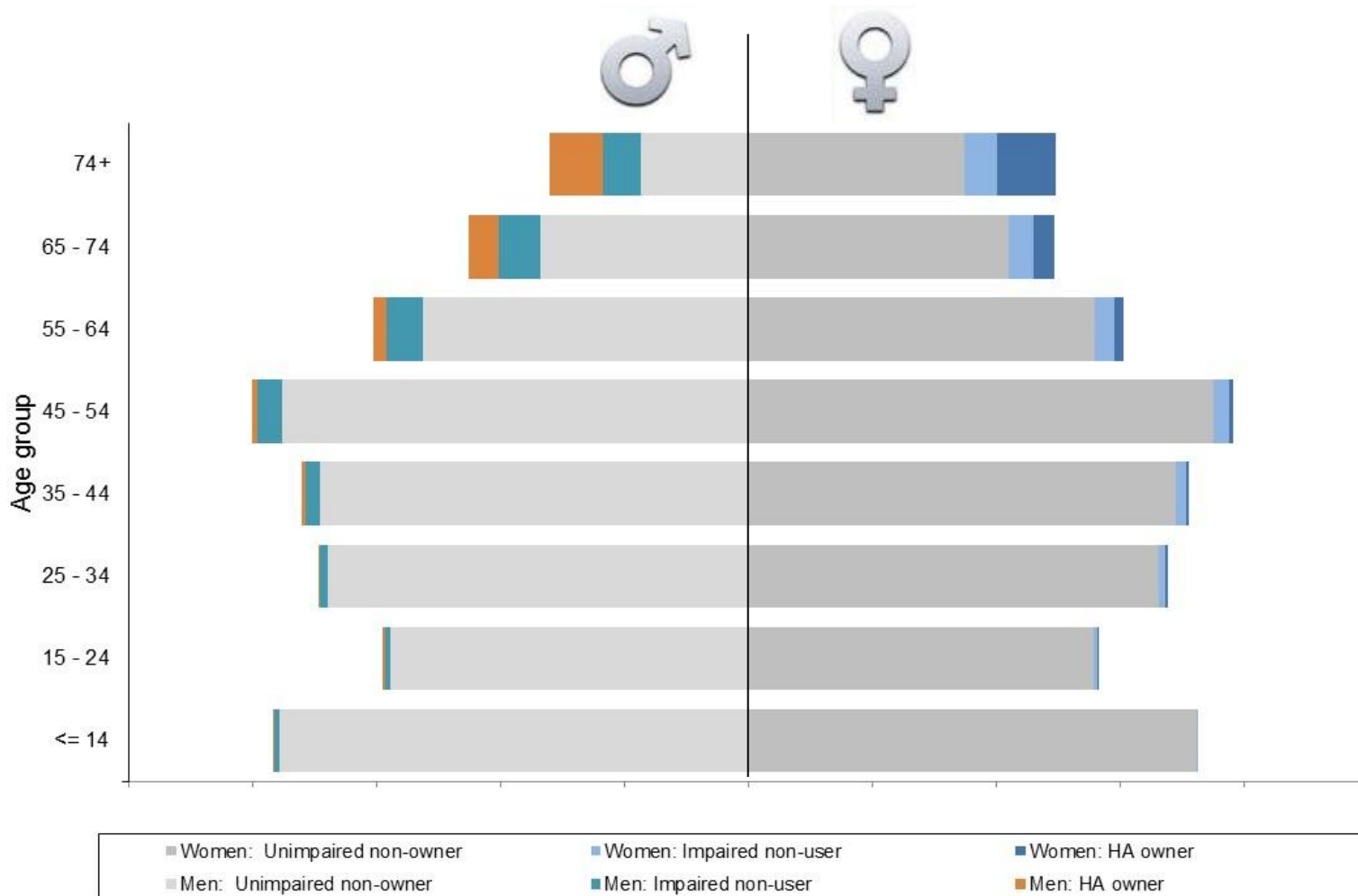
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## 2. Market overview

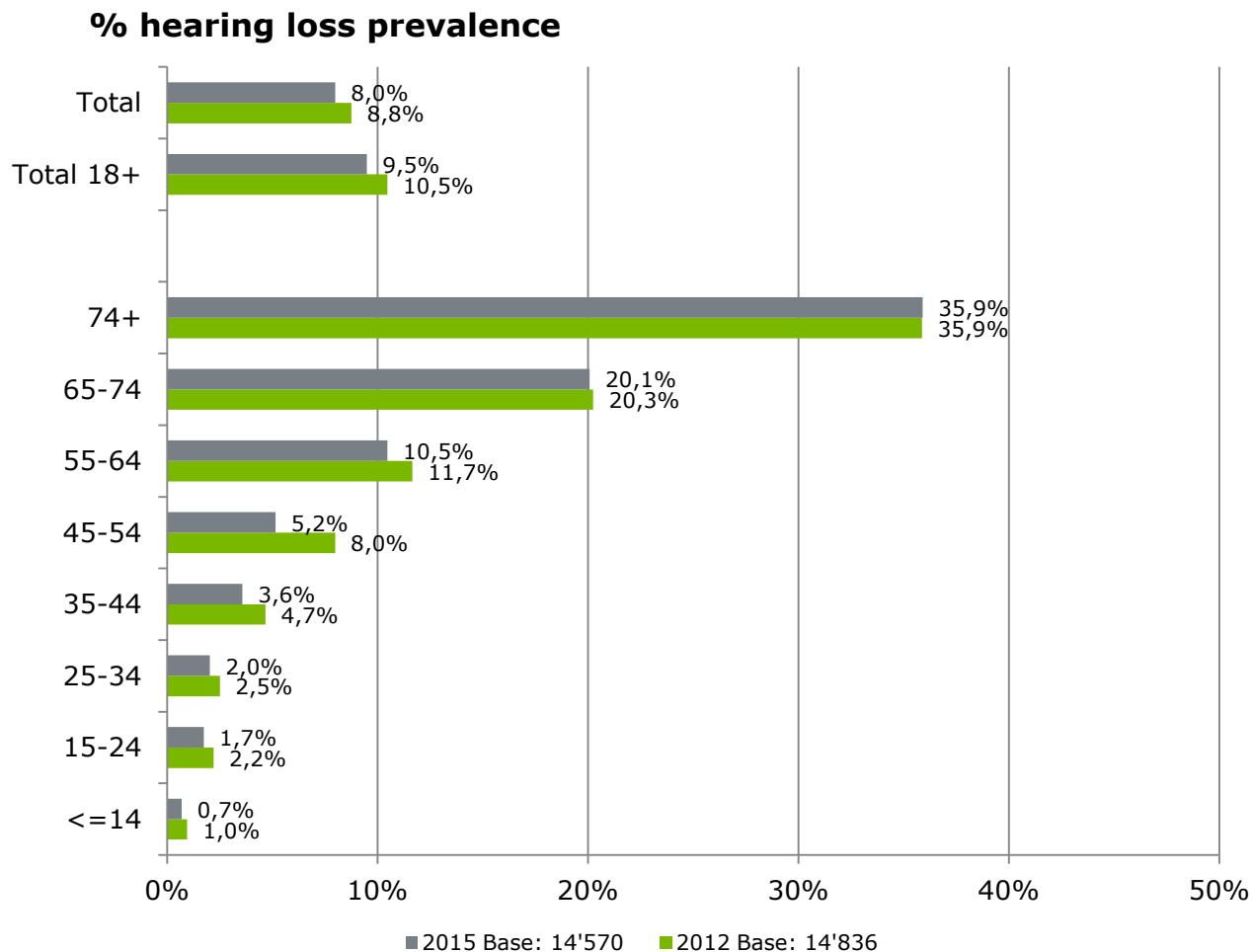
# Prevalence of hearing loss and adoption rate

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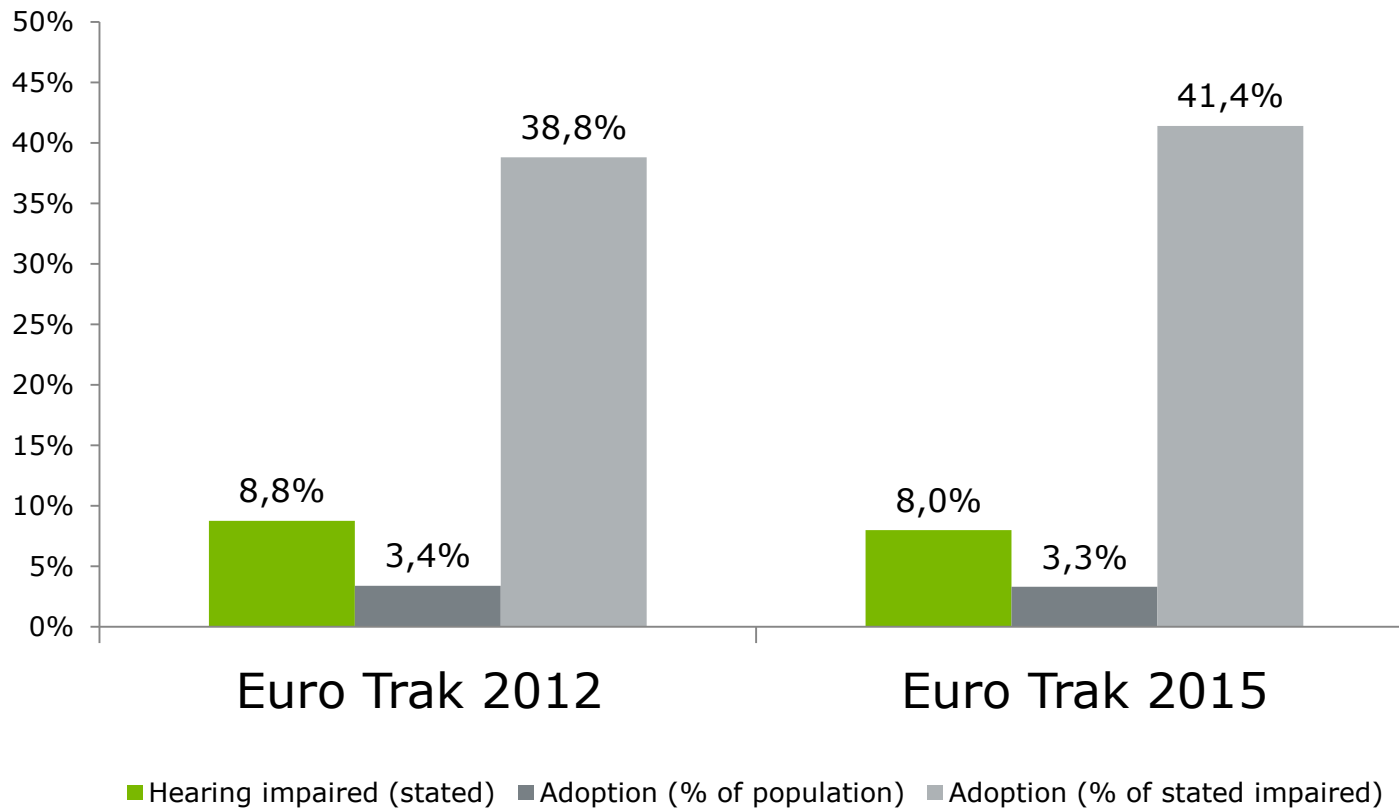
# Hearing loss and hearing instrument ownership by gender/age



# Hearing loss prevalence Switzerland

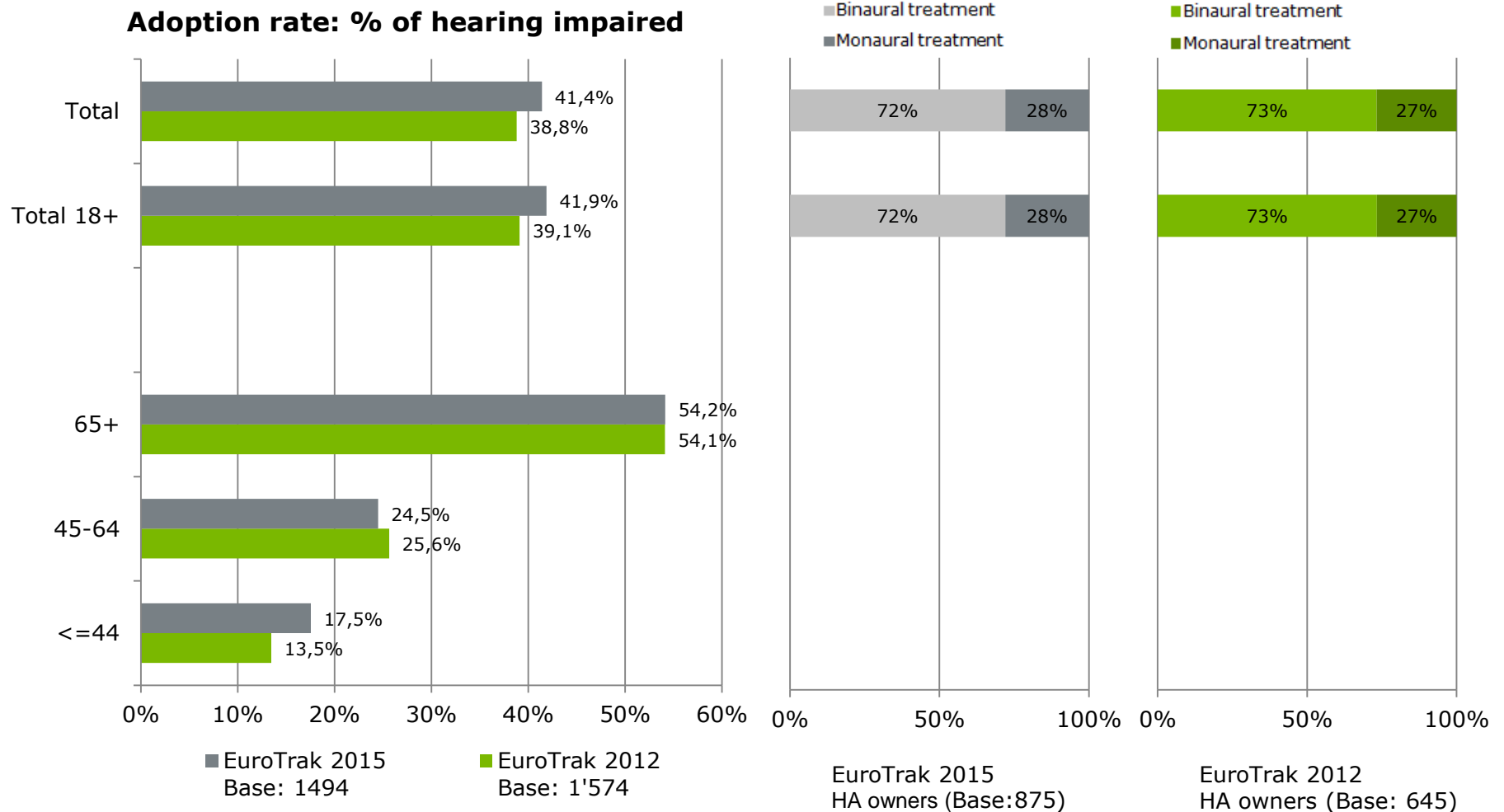


# Overview hearing loss prevalence and hearing aid adoption

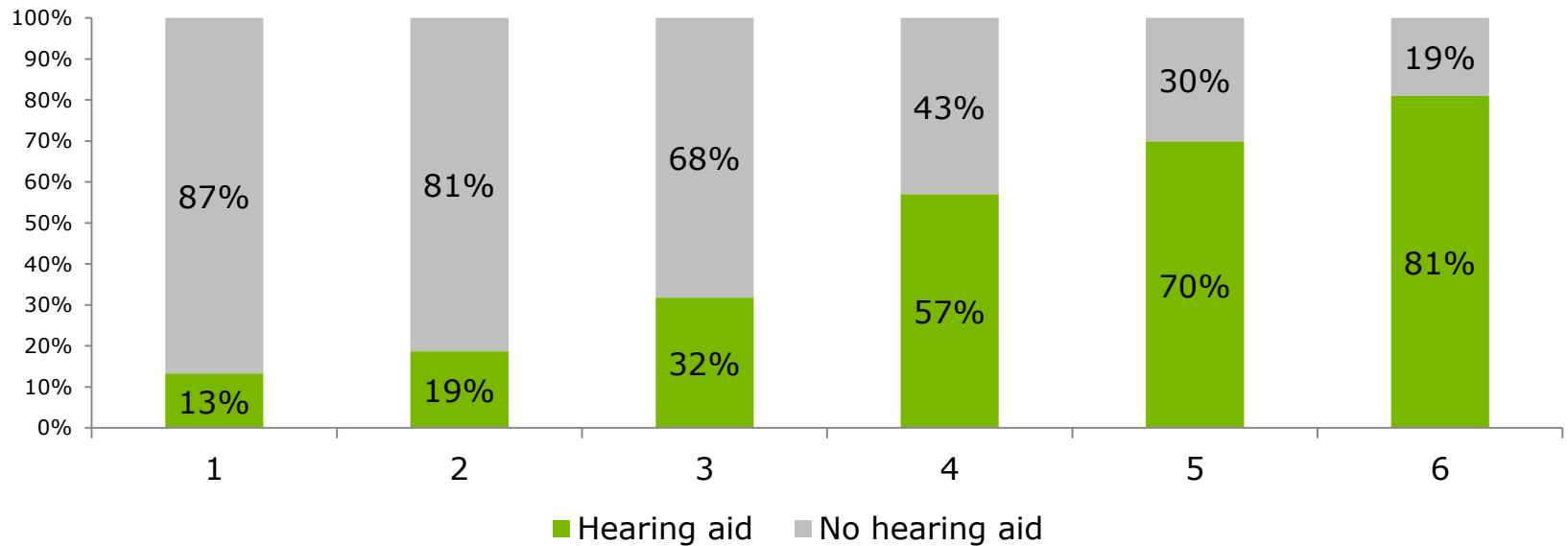




# Hearing aid adoption rate Switzerland 2015 increased slightly: 41.4% of hearing impaired have hearing aid(s), 72% of them have binaural treatment



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



**Hearing loss 6-groups**

HA-non-owner, n=682  
HA-owner, n=619

\* 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

	<b>HA-Non-owner</b> 2015: n=682 (2012: n=813)	<b>HA Owner</b> 2015: n=619 (2012: n= 514)	<b>Hearing Aid Adoption (%)</b>
<b>Ears impaired (stated)</b>			
Unilateral loss	43% (41%)	14% (18%)	20% (24%)
Bilateral loss	57% (59%)	86% (82%)	55% (50%)
<b>Perceived loss</b>			
Mild	46% (53%)	11% (14%)	14% (15%)
Moderate	44% (35%)	61% (57%)	50% (52%)
Severe	6% (7%)	25% (23%)	68% (63%)*
Profound	4% (4%)	4% (6%)	

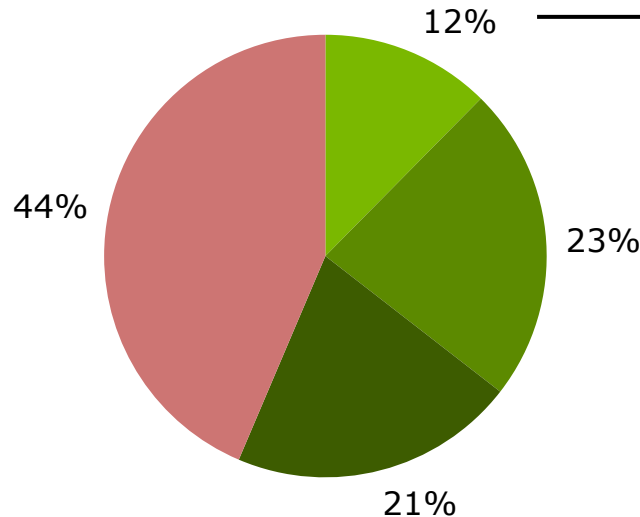
n's are unweighted whereas the shown results are weighted  
 \* combined "severe" and "profound" because n is too small

# Hearing tests and where hearing is tested

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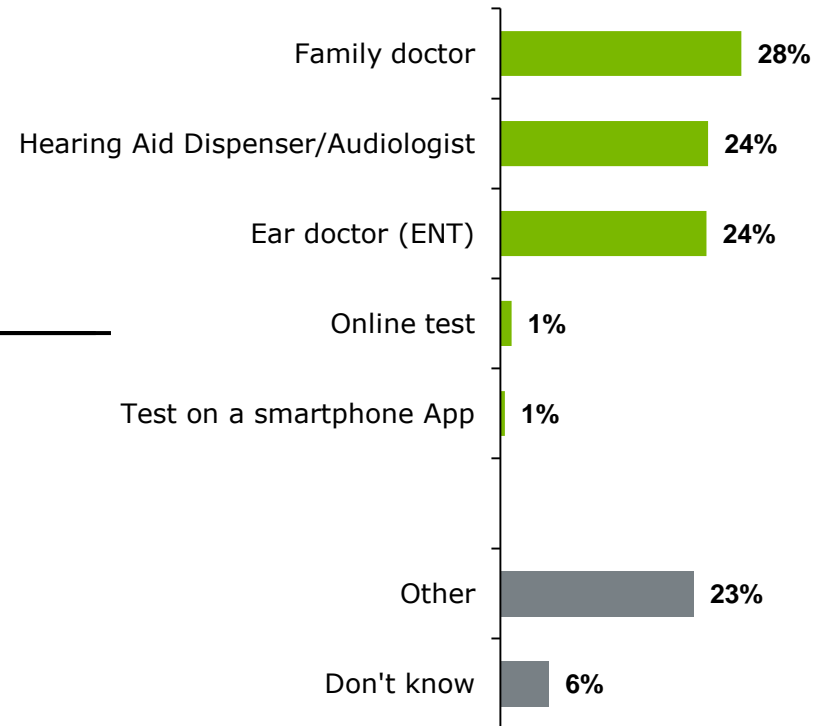
# 35% (2012: 39%) had their hearing tested in the last 5 years – most tests are done by family doctors

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



Base=9'937

Where/how was your hearing tested?



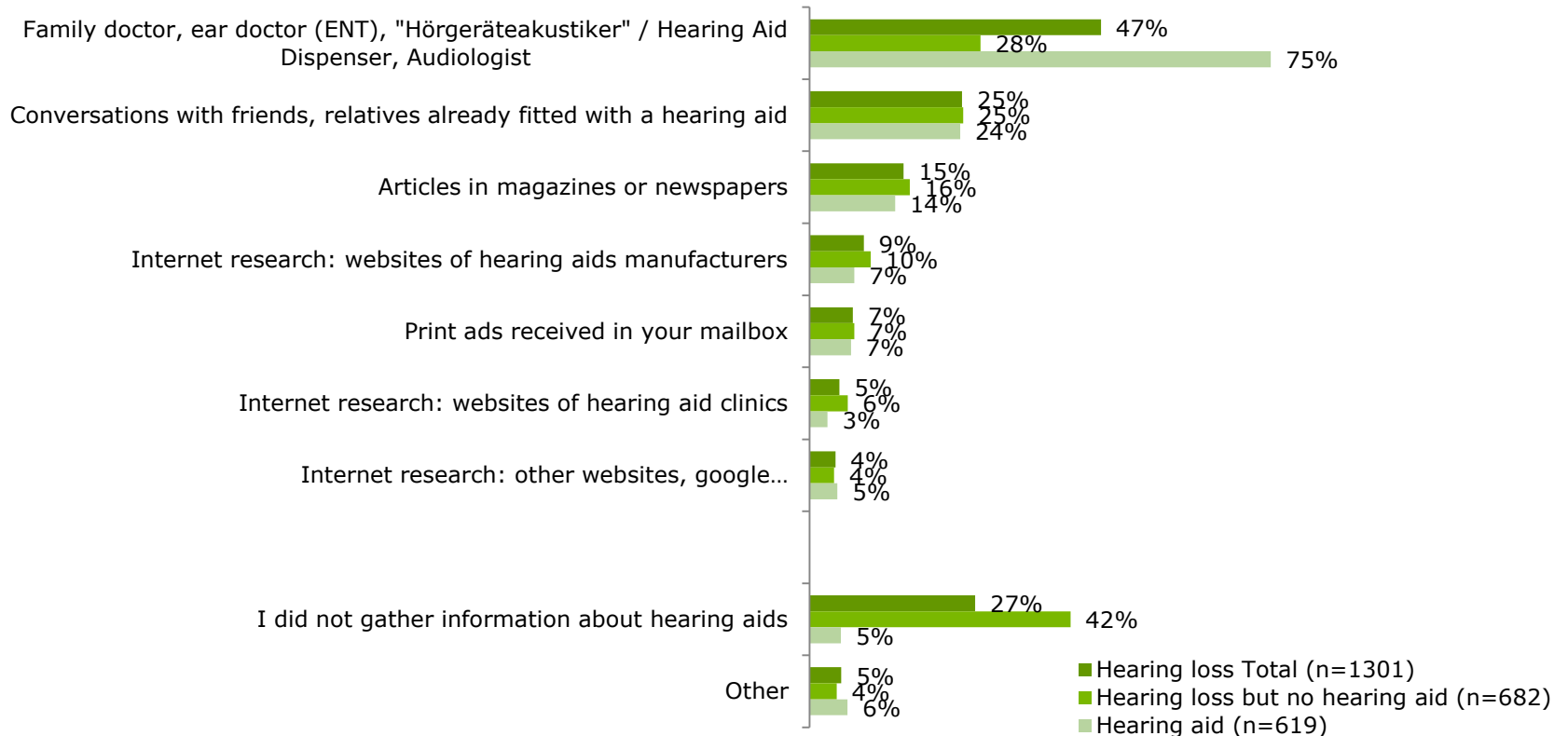
Base= 3'739

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

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Doctors and hearing aid dispensers are the most important source of information and therefore the major gatekeepers – followed by other people with hearing aids.

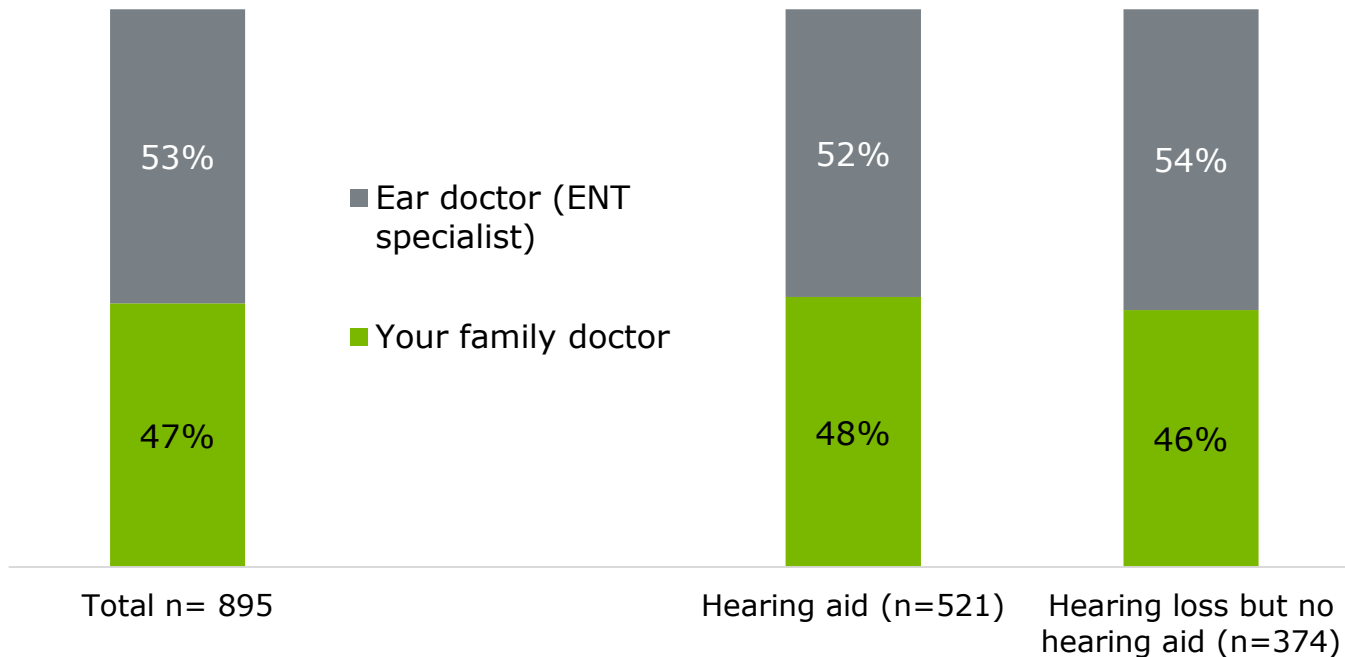
Where did you gather information about hearing aids?  
Please check all that apply.



# Of those who discussed the hearing loss with a doctor, about half talked to an ENT first and the other half talked to the family doctor first

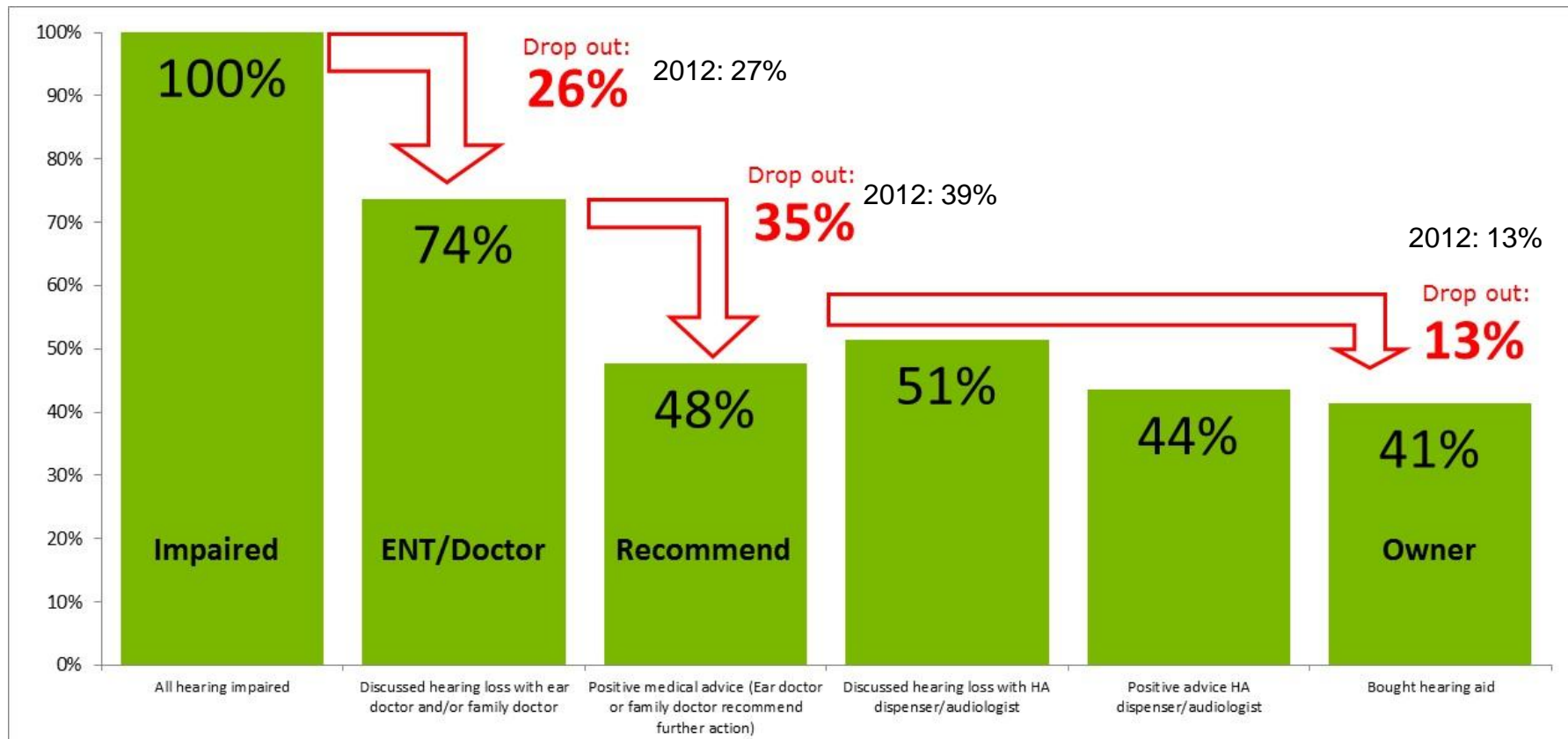
Those who discussed hearing loss with family doctor and/or ENT:

Who was the doctor you discussed your hearing loss with for the **first time** – your family doctor or the ENT specialist?





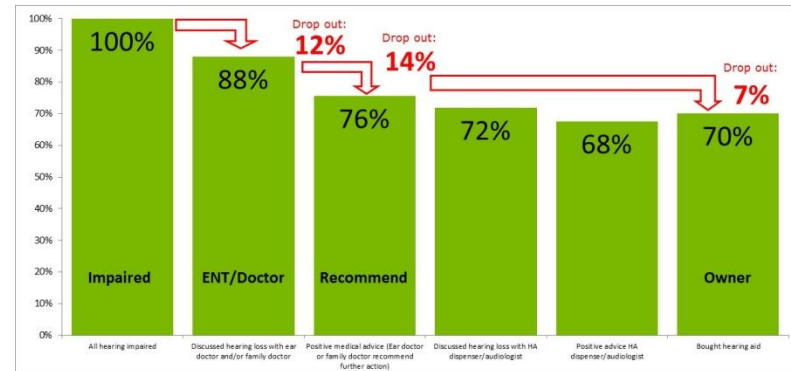
# The route to the hearing aid: Compared to 2012 drop out 2 was reduced slightly



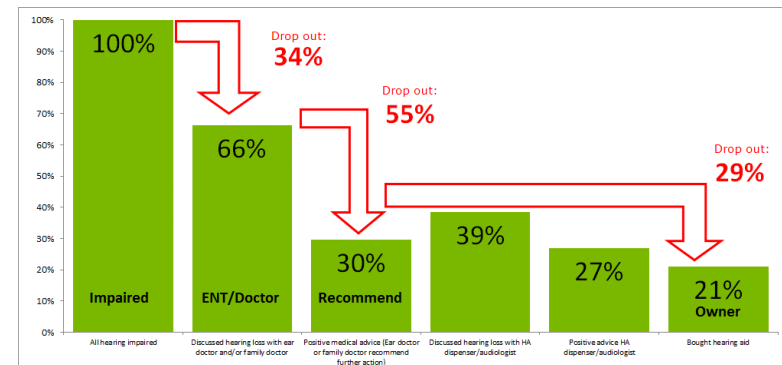
Base: n=1'301

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

Top 50% hearing loss\*



Low 50% hearing loss\*



Base: n=1'301

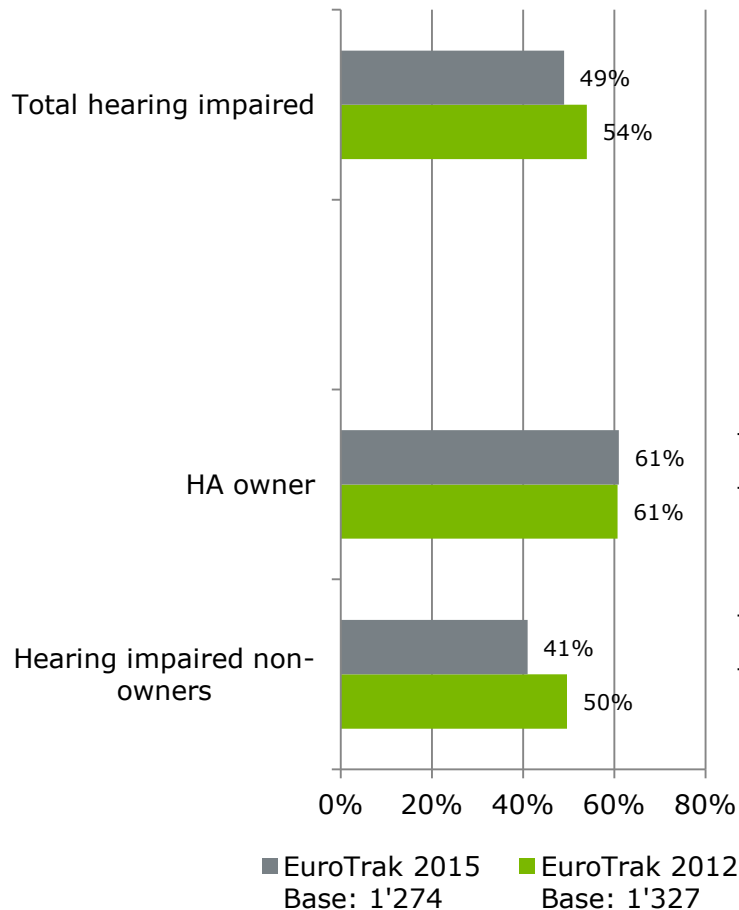
\* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- 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

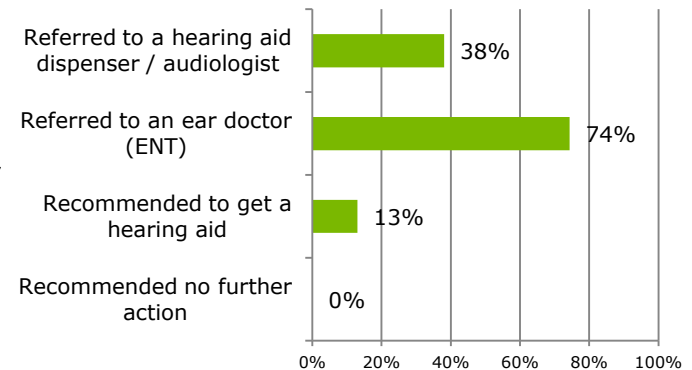
## Have you discussed your hearing problem with your family doctor?

**% Discussed with GP**

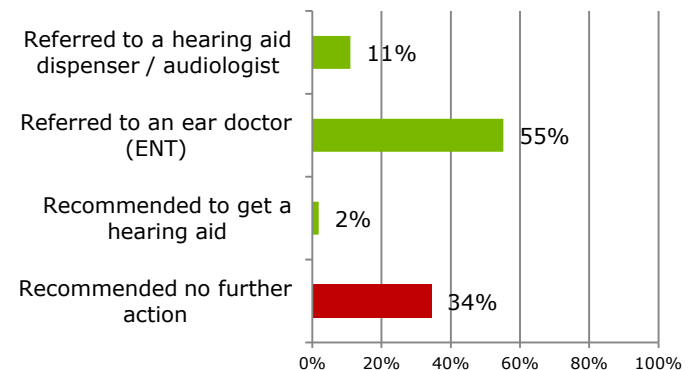


**What did he/she recommend ?**

### HA owner (Base: 349)



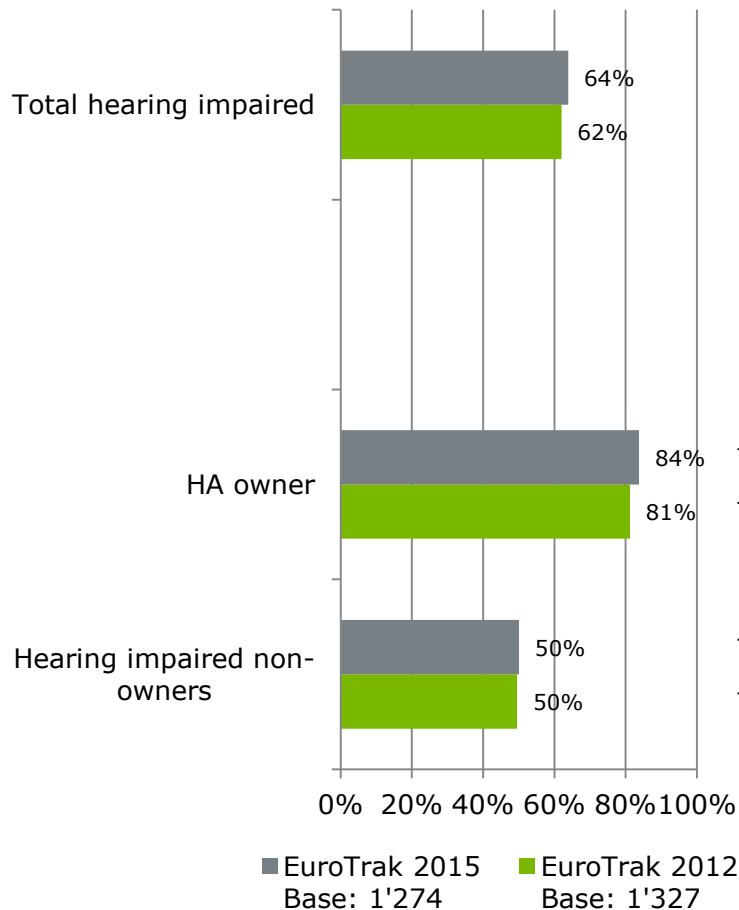
### Impaired non-owner (Base: 262)



# The route to the hearing aid: ENT

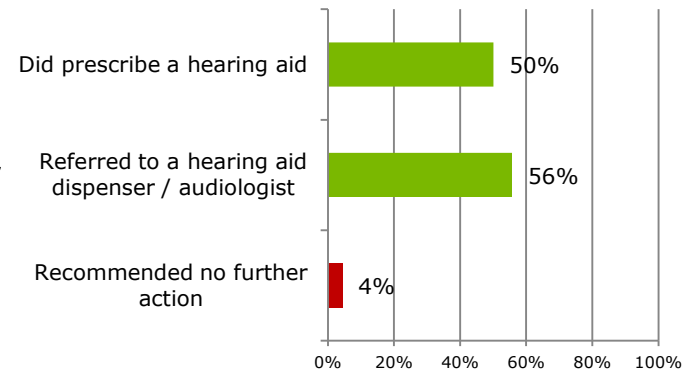
Have you discussed your hearing problem with an ear doctor (ENT)?

**% Discussed with ENT**

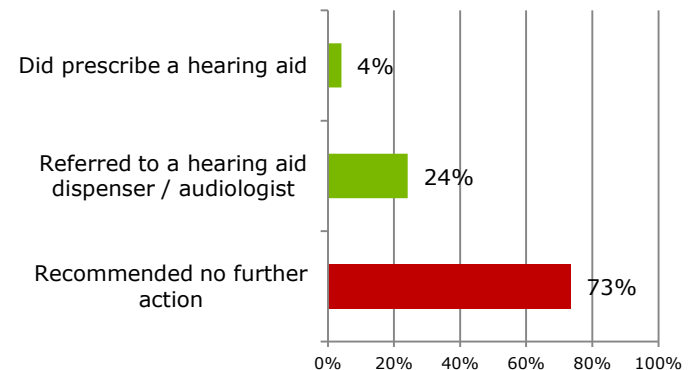


**What did he/she recommend ?**

**HA owner (Base: 499)**



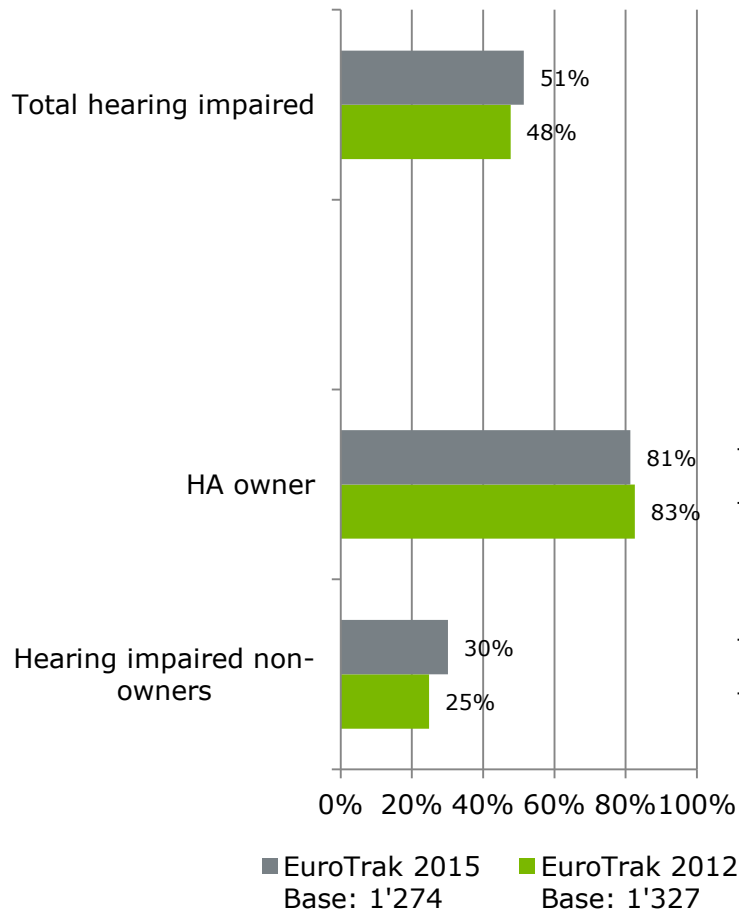
**Impaired non-owner (Base: 329)**



# The route to the hearing aid: Audiologist

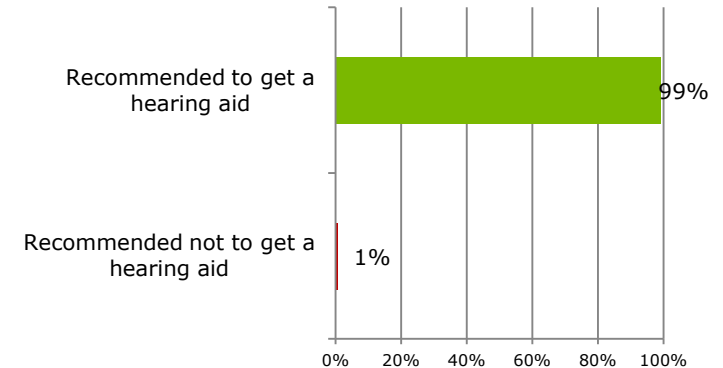
## Have you discussed your hearing problem with a Hearing Aid Dispenser/Audiologist?

**% Discussed with Audiologist**

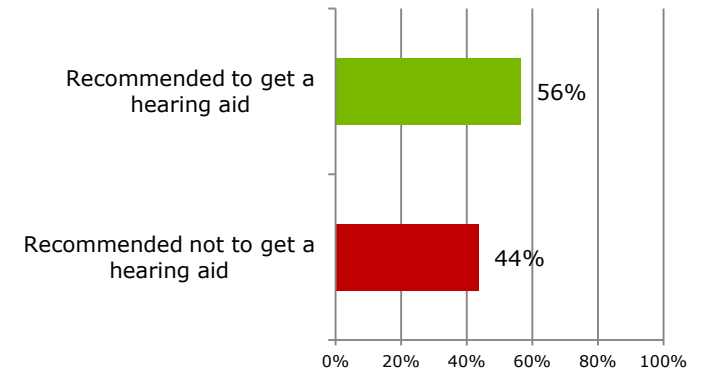


**What did he/she recommend ?**

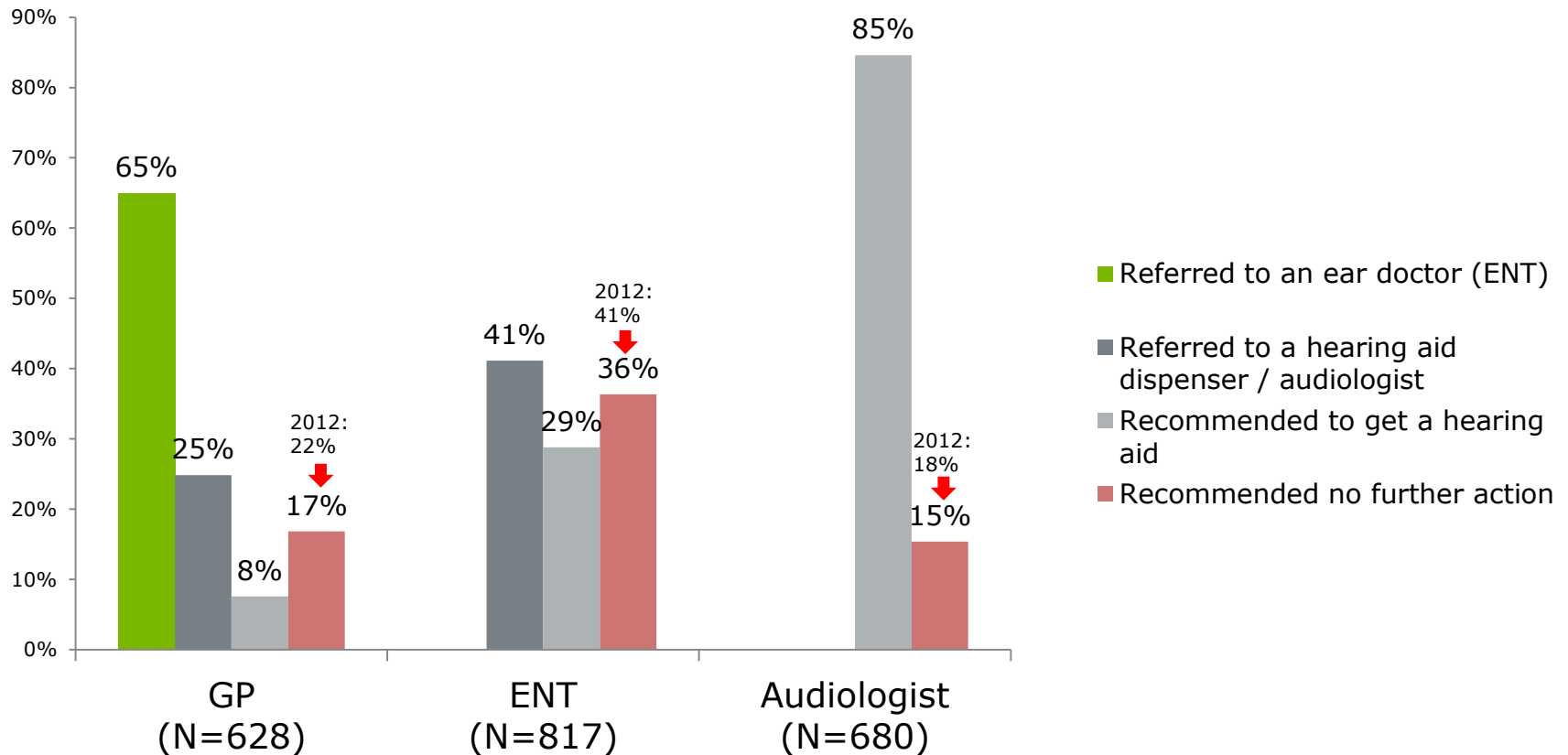
**HA owner (Base: 482)**



**Impaired non-owner (Base: 198)**



## Recommendations by profession: Especially GP's and ENT's recommended hearing aids more often than in 2012

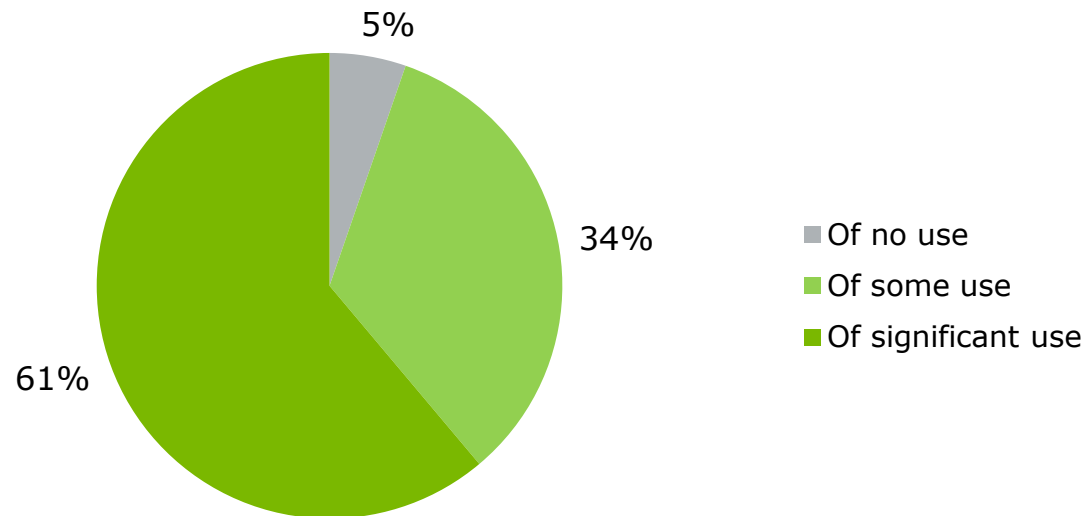


# Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality

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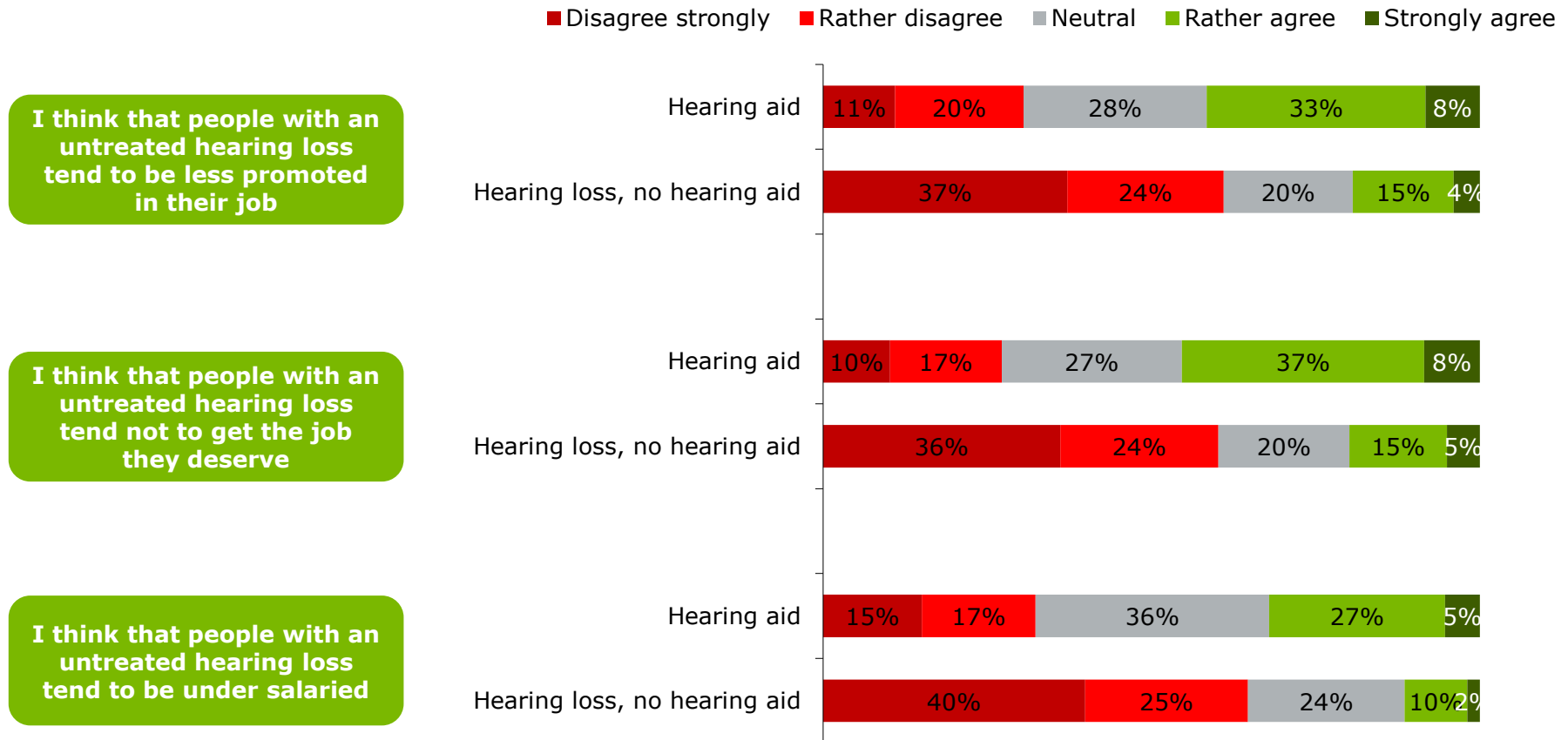
**Work competitiveness:** 95% of the working hearing aid owners state their hearing aid(s) are useful on their job.

### How useful are your hearing aids on your job?





**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.



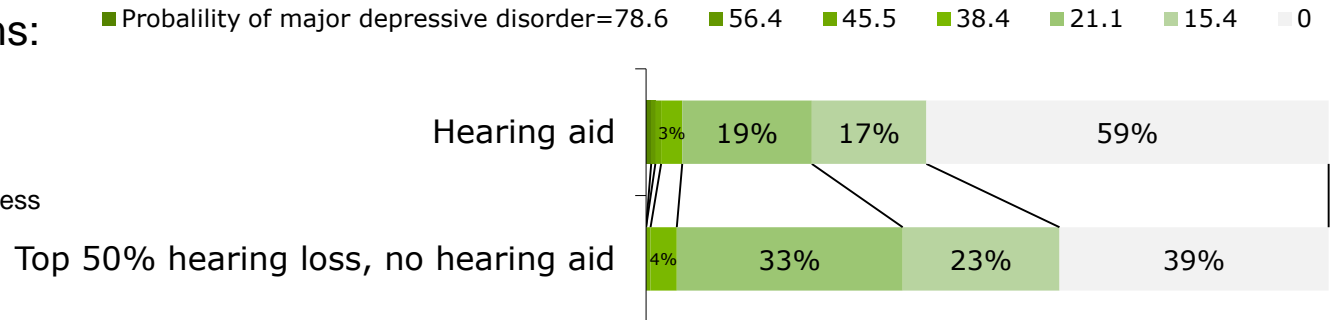
Base: Hearing loss, no hearing aid =434/ hearing aid n=381

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

### Depression symptoms: PHQ-2 Screening:

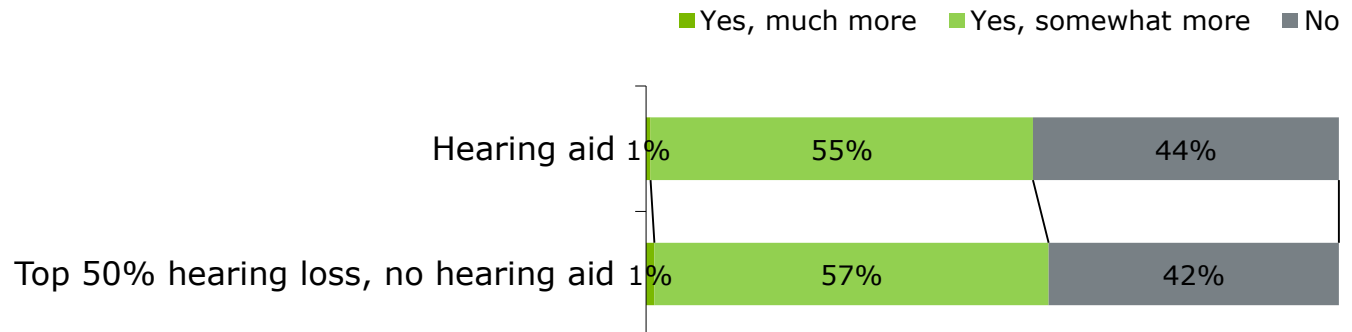
In the last 2 weeks:

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



### Dementia symptom:

Getting more forgetful in the last year?



Base: hearing aid n=365 / no hearing aid =119

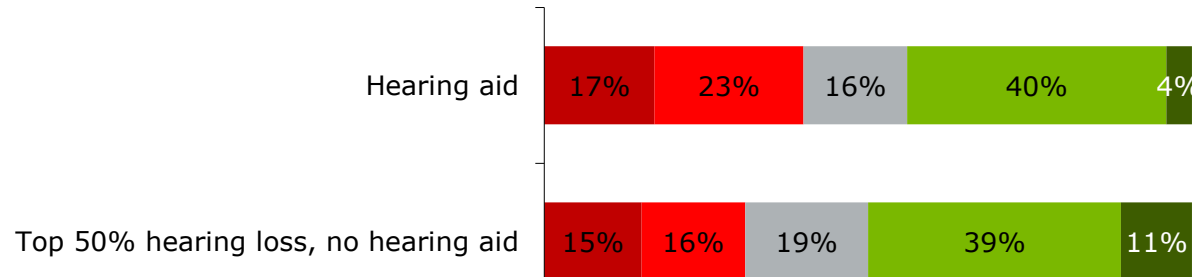
\*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
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  - 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).

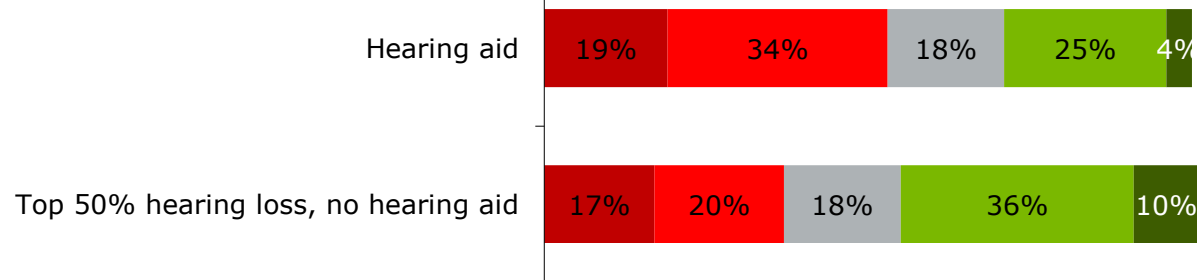
# Health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top 50% hearing loss\*), hearing aid owners feel less exhausted in the evenings

■ Disagree strongly ■ Rather disagree ■ Neutral ■ Rather agree ■ Strongly agree

In the evenings I often feel physically exhausted



In the evenings I often feel mentally exhausted



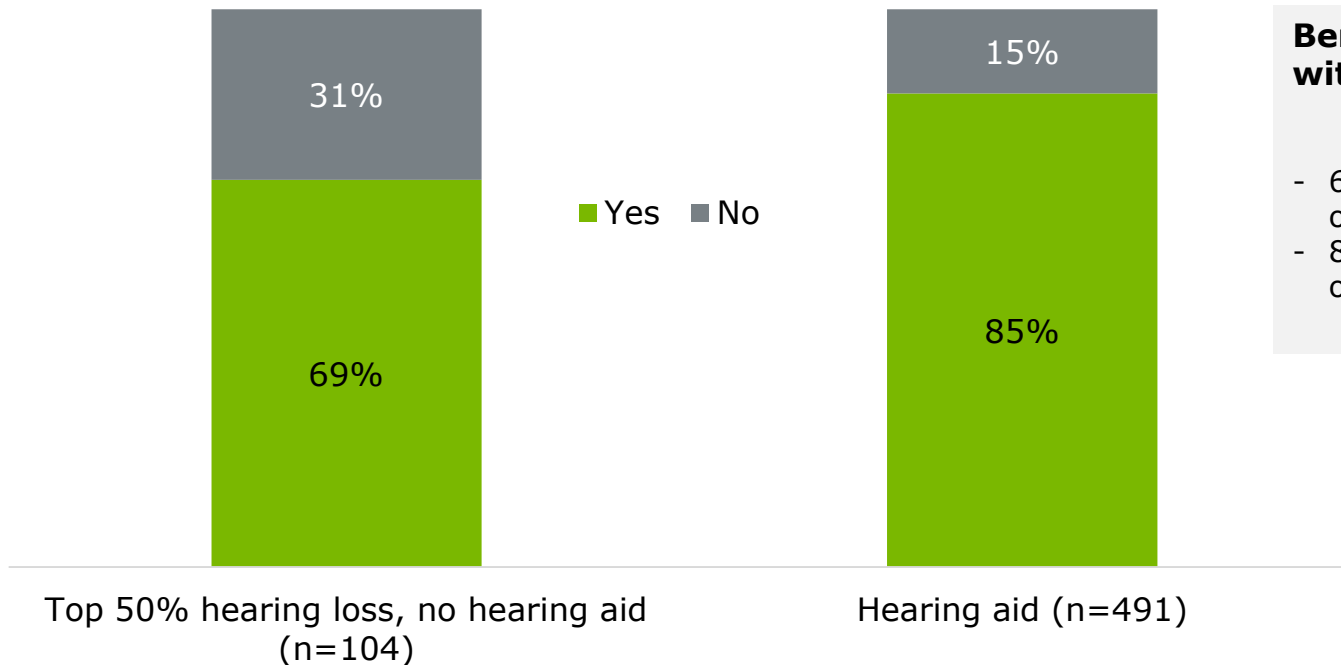
Base : Top 50% n=139 / hearing aid n=609

\*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).

# Health problems: While quality of sleep tends to be lower for hearing impaired - it seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?



## Benchmarks (% satisfied with quality of sleep):

- 69% of dissatisfied hearing aid owners (n=42)
- 87% of satisfied hearing aid owners (n=401)

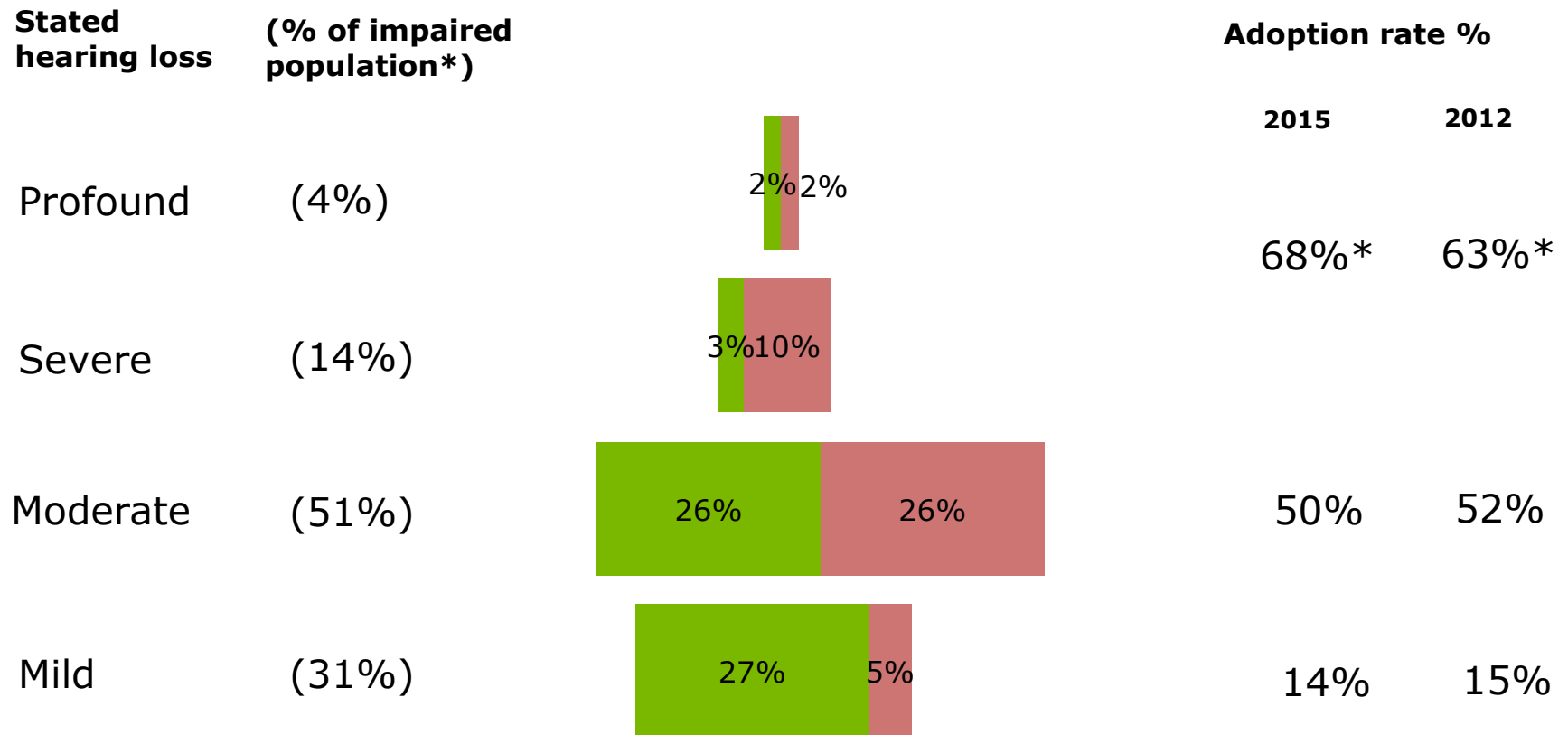
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## 3. Analysis of hearing aid owners

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

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# Low adoption rates within mild and moderate hearing loss



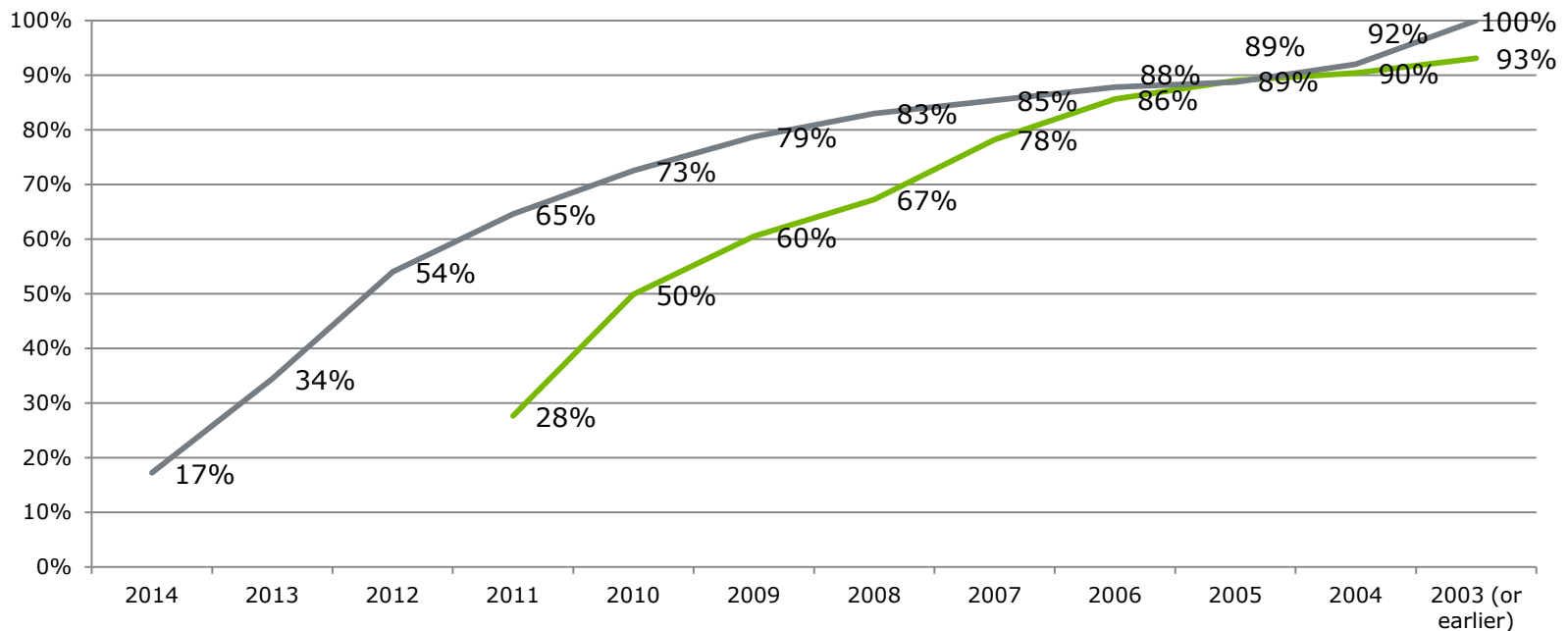
Base: n=1'301

Sums can differ from 100% due to rounding

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

# 34% of the currently owned HAs were bought in the last two years (EuroTrak 2012: 50%)

## Year of purchase



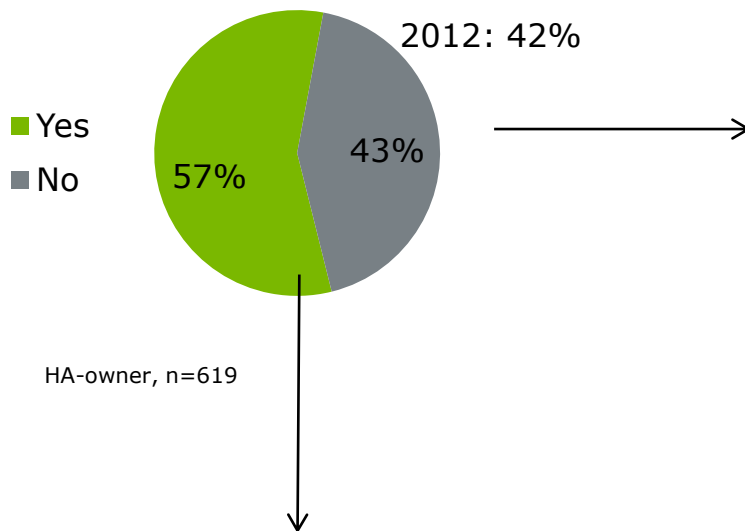
**Age of currently owned HAs (Mean):**  
**2015: 3.8 years**  
**2012: 3.1 years**

HA-owner, n=619

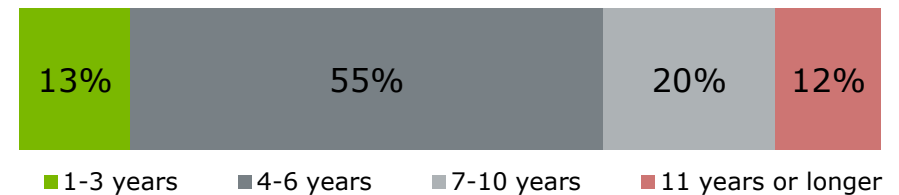


On average 2 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 6 years before they are being replaced.

**Current HAs = first HAs?**



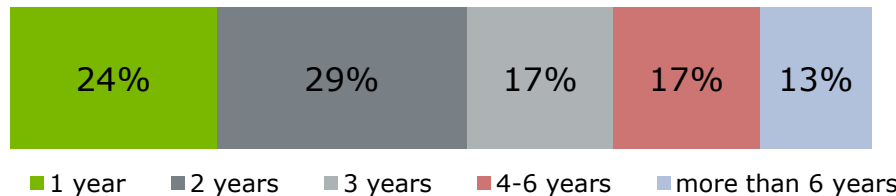
**How many years did you own your previous HAs?**



Base: n=266

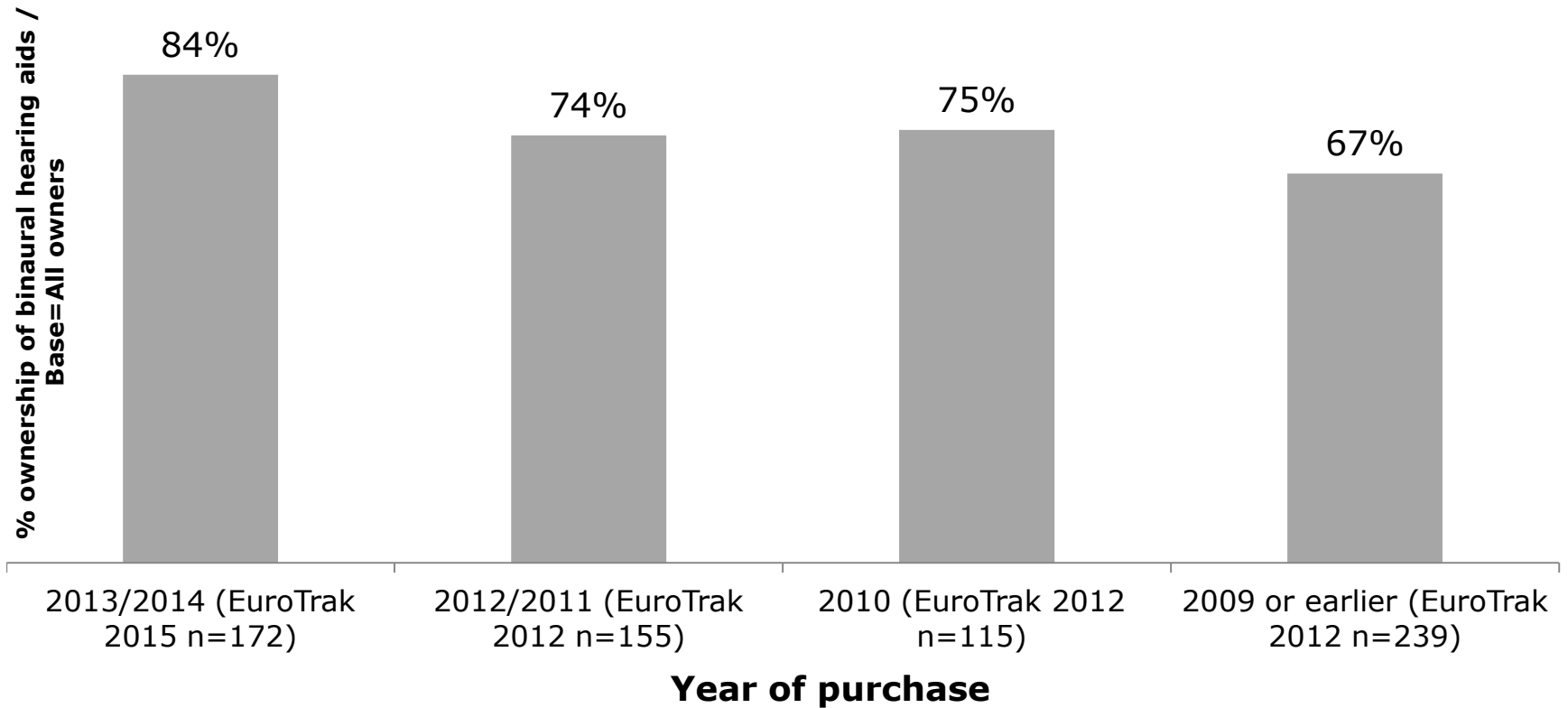
Age of HA before it has been replaced:  
 2015: 6 years (median)  
 2012: 5 years (median)

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



Base: n=239

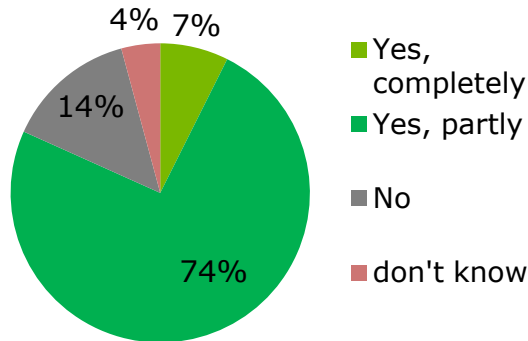
# Binaural treatment by purchase date



# More than 80% received some kind of 3rd party reimbursement. Information deficit non-owners: only 46% know whether insurance would pay

**EuroTrak 2015**

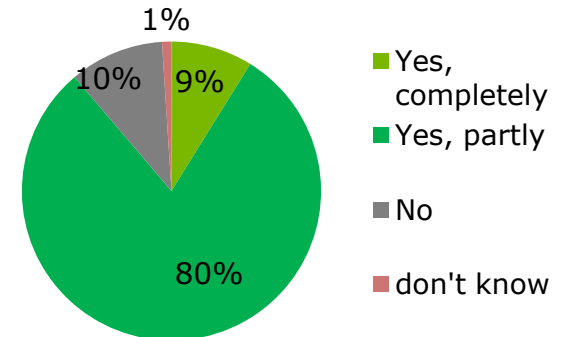
Bought..  
 • before July 1<sup>st</sup> 2011: 12/80/7/0%  
 • After July 1<sup>st</sup> 2011: 3/73/19/4%



HA-owner, n=619

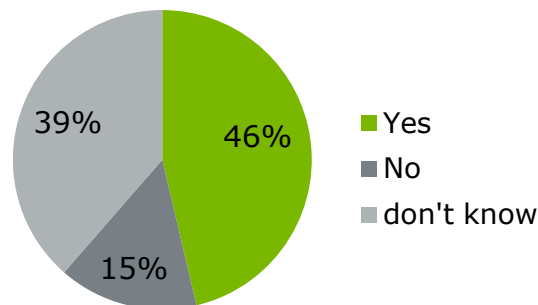
**Owners:** Was any part or all of your hearing aid(s) paid for by a third party ? (AHV, IV)

**EuroTrak 2012**

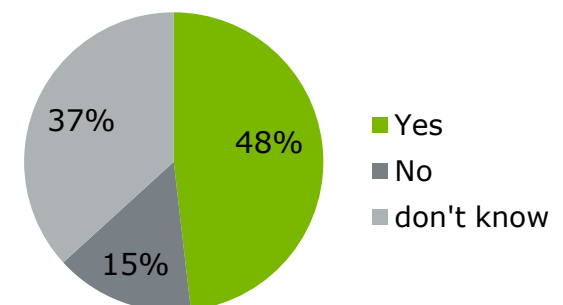


HA-owner, n=514

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



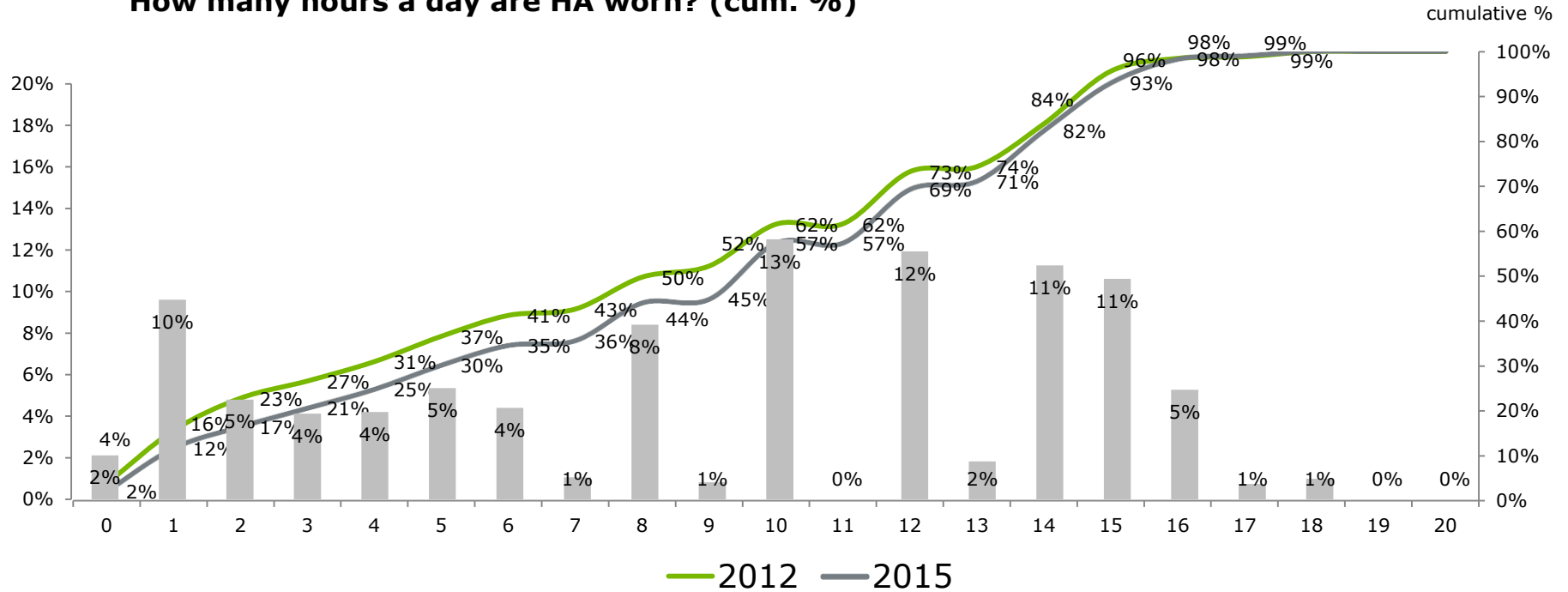
HA-non-owners, n=682



HA-non-owners, n=812

# On average, HAs are worn 9 hours a day

**How many hours a day are HA worn? (cum. %)**

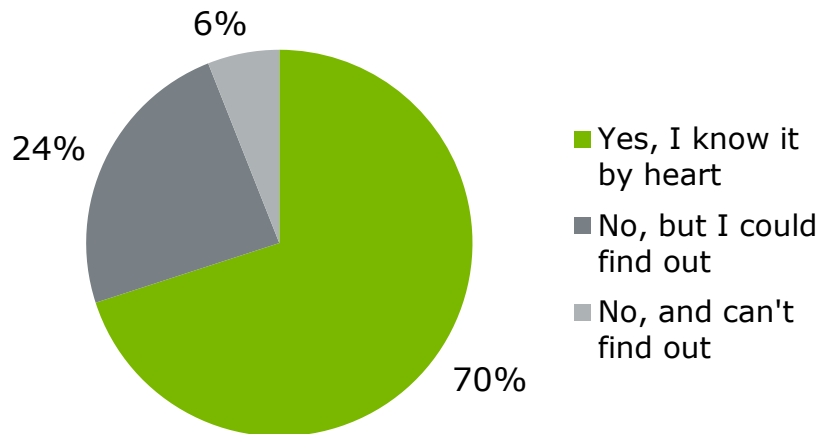


**HA worn:**  
**Mean:**  
**2015 9.0 hours/day**  
**2012 8.3 hours/day**

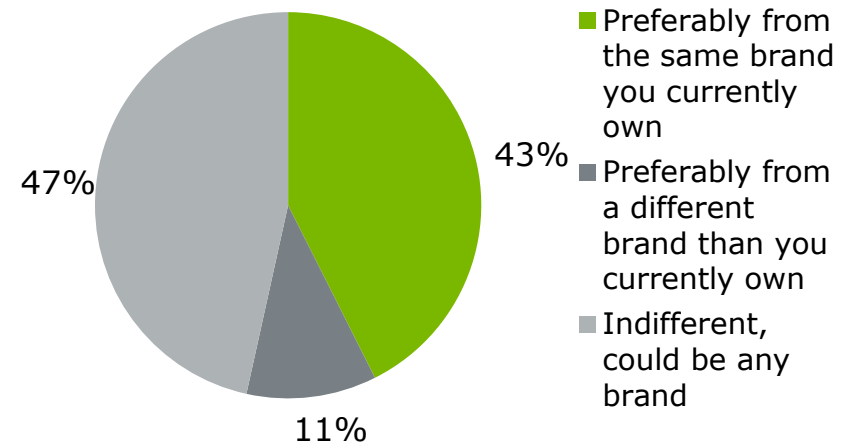
HA-owner, n=619

# 77% of today's hearing aid owners are aware of their hearing aid brand

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

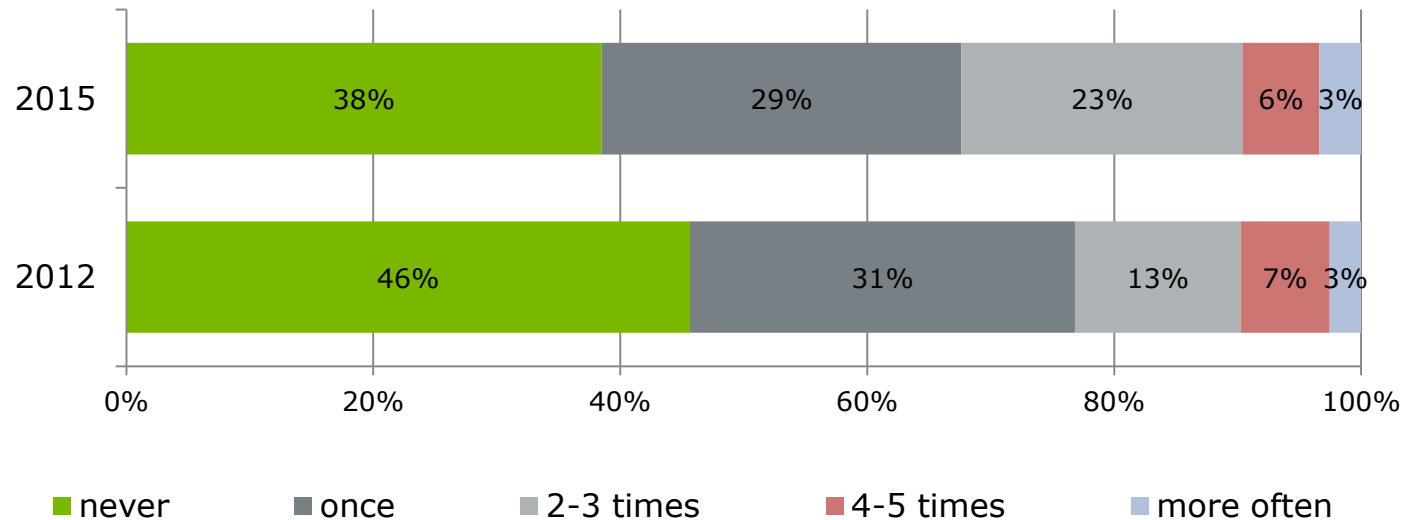


**In case you plan to obtain new hearing aid(s), what brand would you choose?**



# 67% of the currently owned HAs either had no repair need or only once

**How often has your current hearing aid required a repair because it was not working properly?**



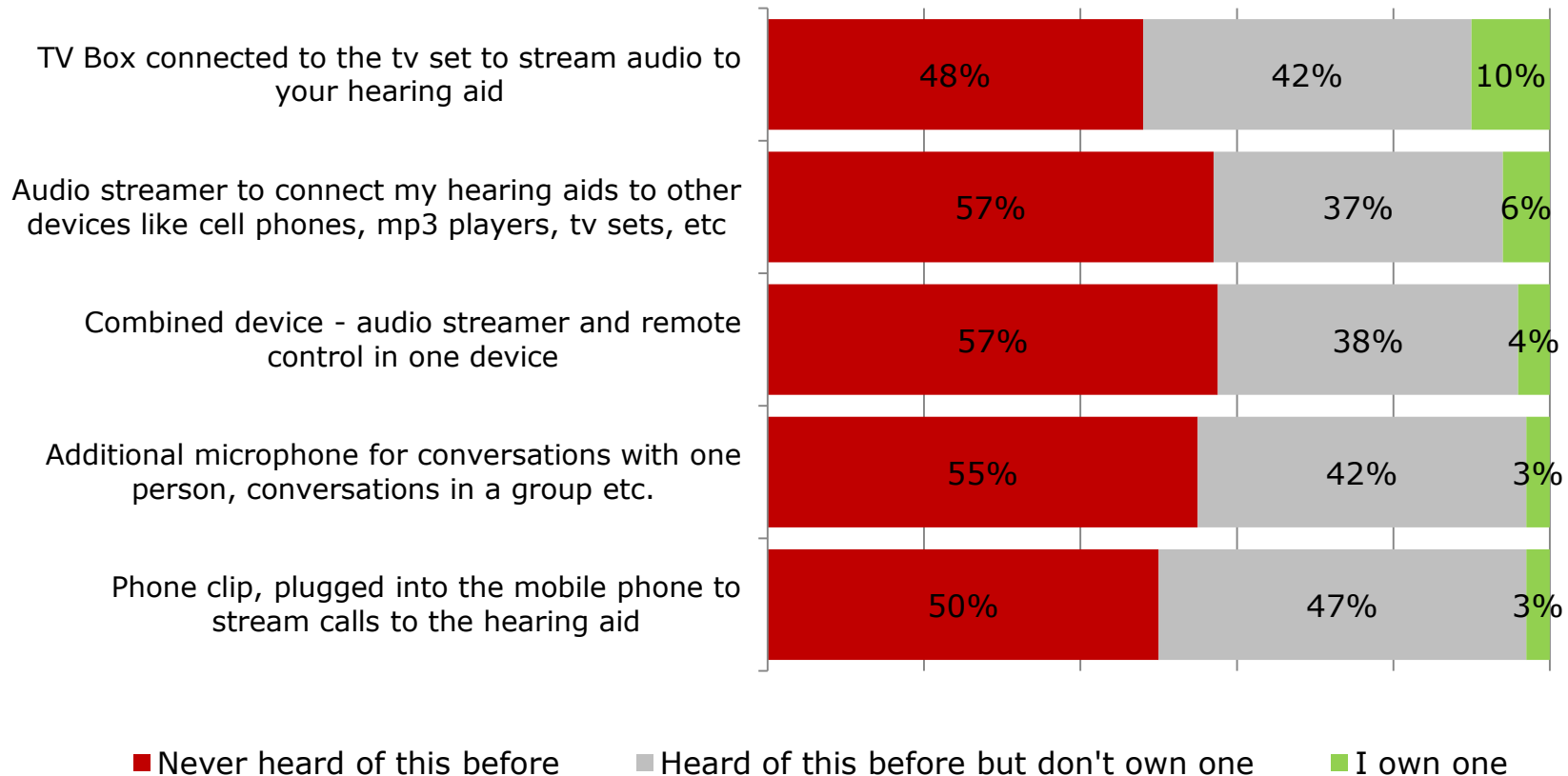
HA-owner  
2015 n=613  
2012 n=514

# Awareness and usage of accessories and Telecoil

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TV Box is the most often owned electronic accessory: 10 % of hearing aid owners have one – 42% have heard of it but don't own one.

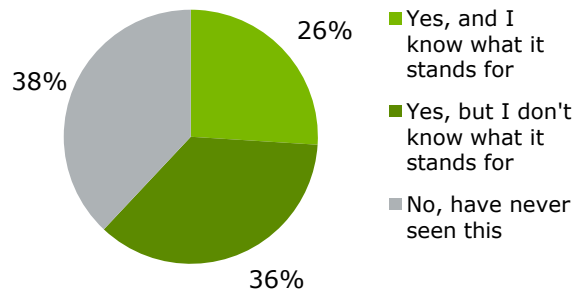
**Which of the following accessories have you heard of and which ones do you own?**



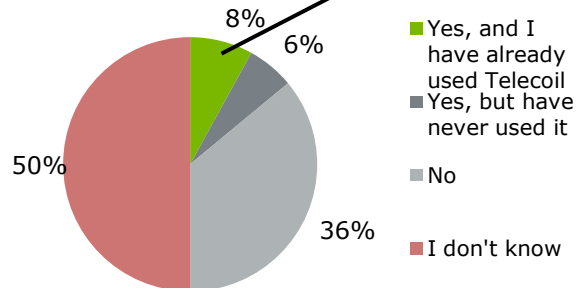


26% of hearing aid owners know what Telecoil is but only 8% have used it – mainly in a church. Most of those who use it are satisfied.

### Have you seen this logo before?

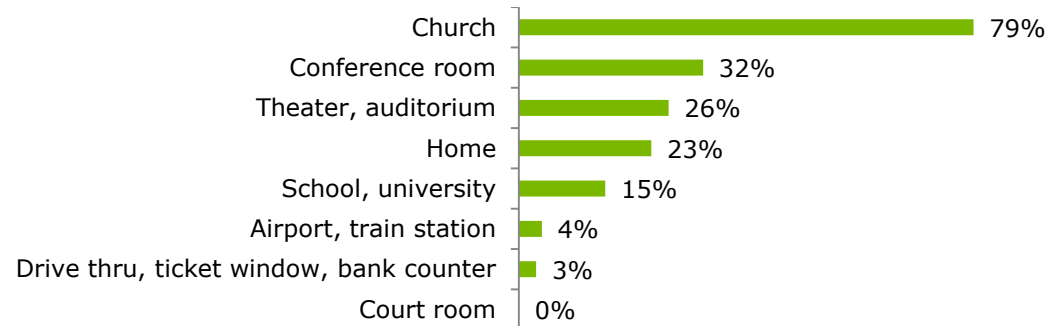


### Are your hearing aids equipped with Telecoil?



HA-owner, n=619

### On what type of venues have you used hearing aids in a hearing loop (Telecoil)?



### How satisfied are you with the use of Telecoil overall?



HA-owner, who have used Telecoil, n=47

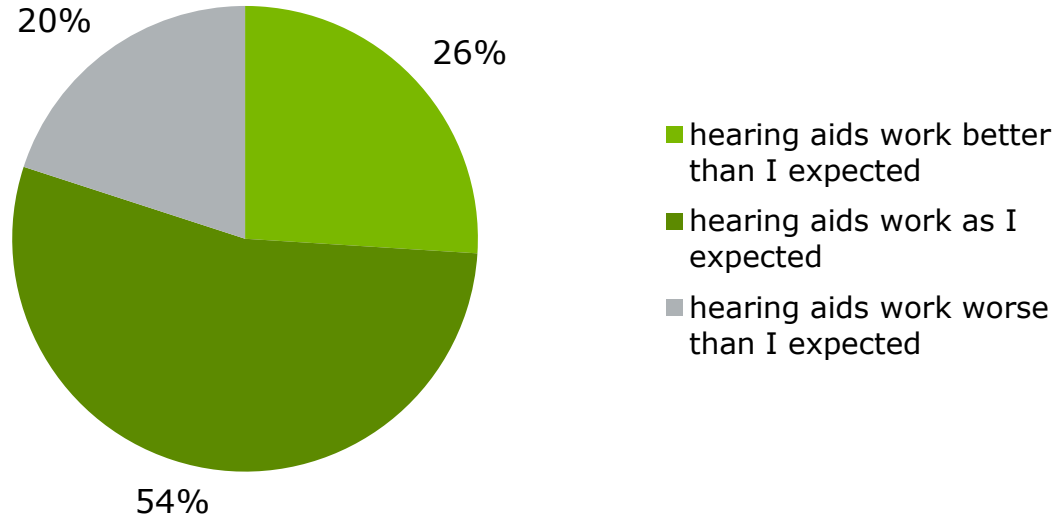


# Satisfaction with hearing aids and drivers

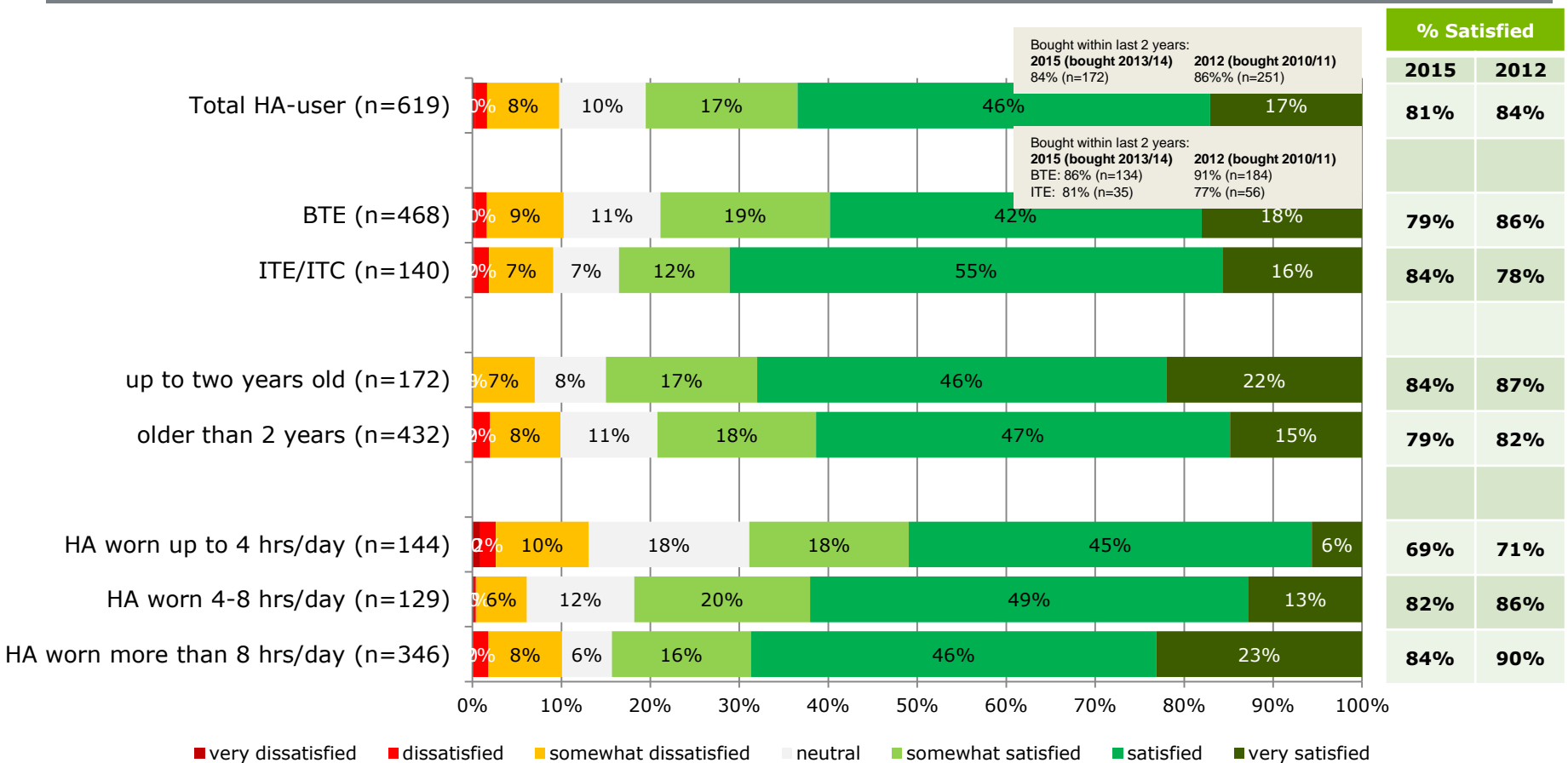
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# 80% of the hearing aid owners say their hearing aid works better or as expected

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



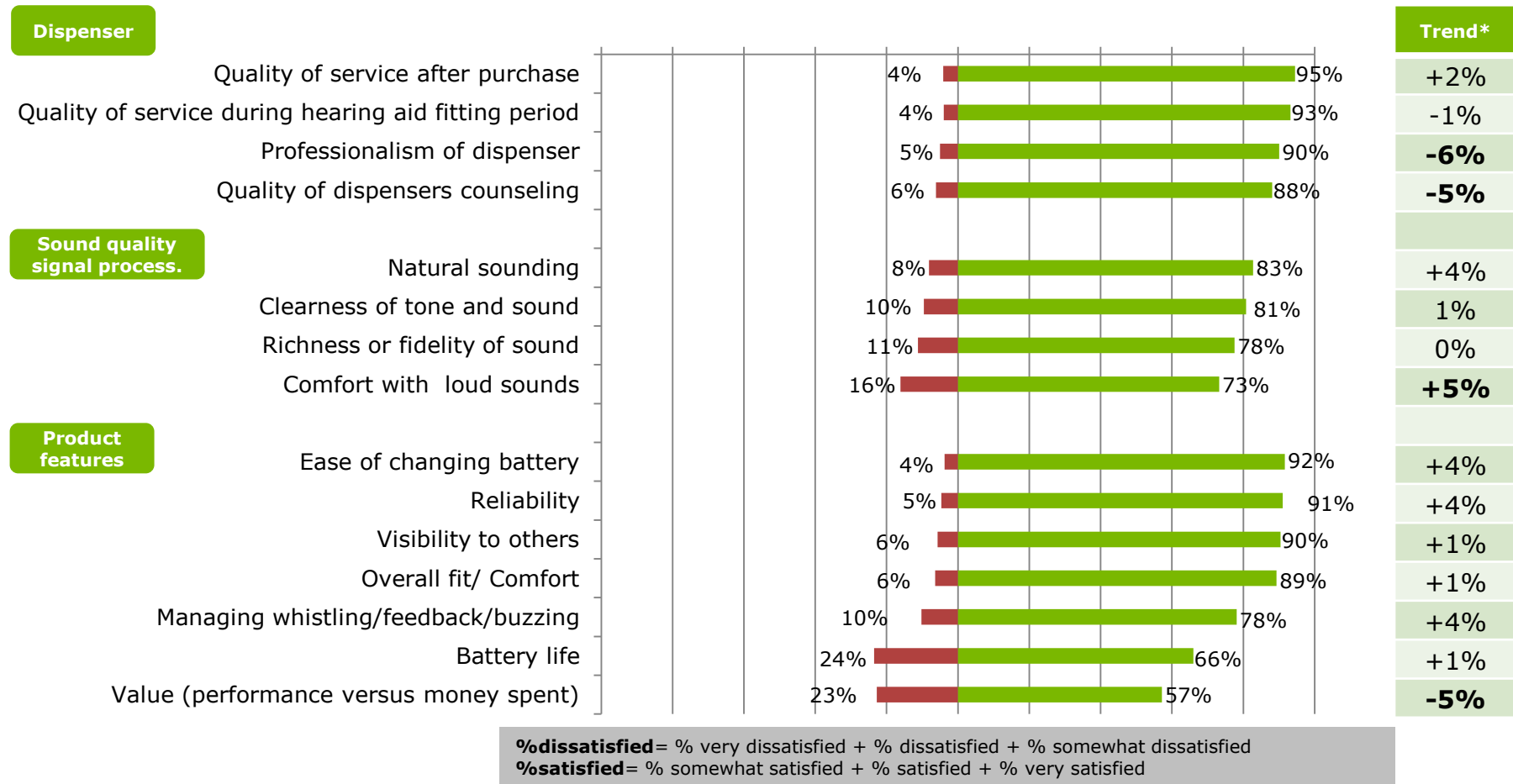
# Overall satisfaction with HA decreased from 84% to 81% since 2012



# Overall Satisfaction with HA: Country comparison

	Switzerland	Germany	UK	France	USA Marke Trak VIII (2008)
Overall satisfaction 2012	84%	77%	72%	80%	(74%)
Overall satisfaction 2015	81%				

# Satisfaction with current hearing aids

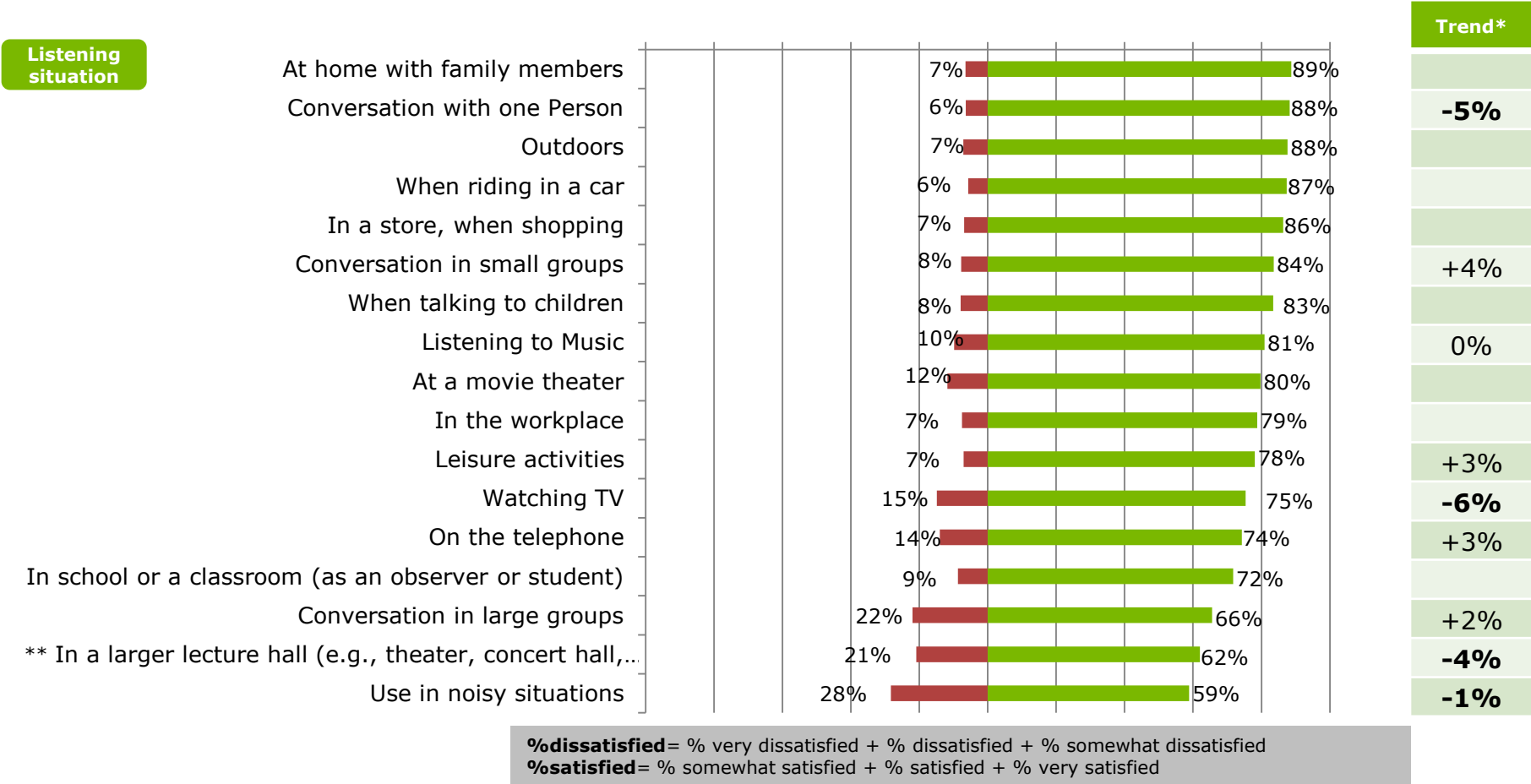


\* % of satisfied HA owners compared to EuroTrak 2012

■ dissatisfied ■ satisfied

HA-owner, n=619

# Satisfaction with current hearing aids

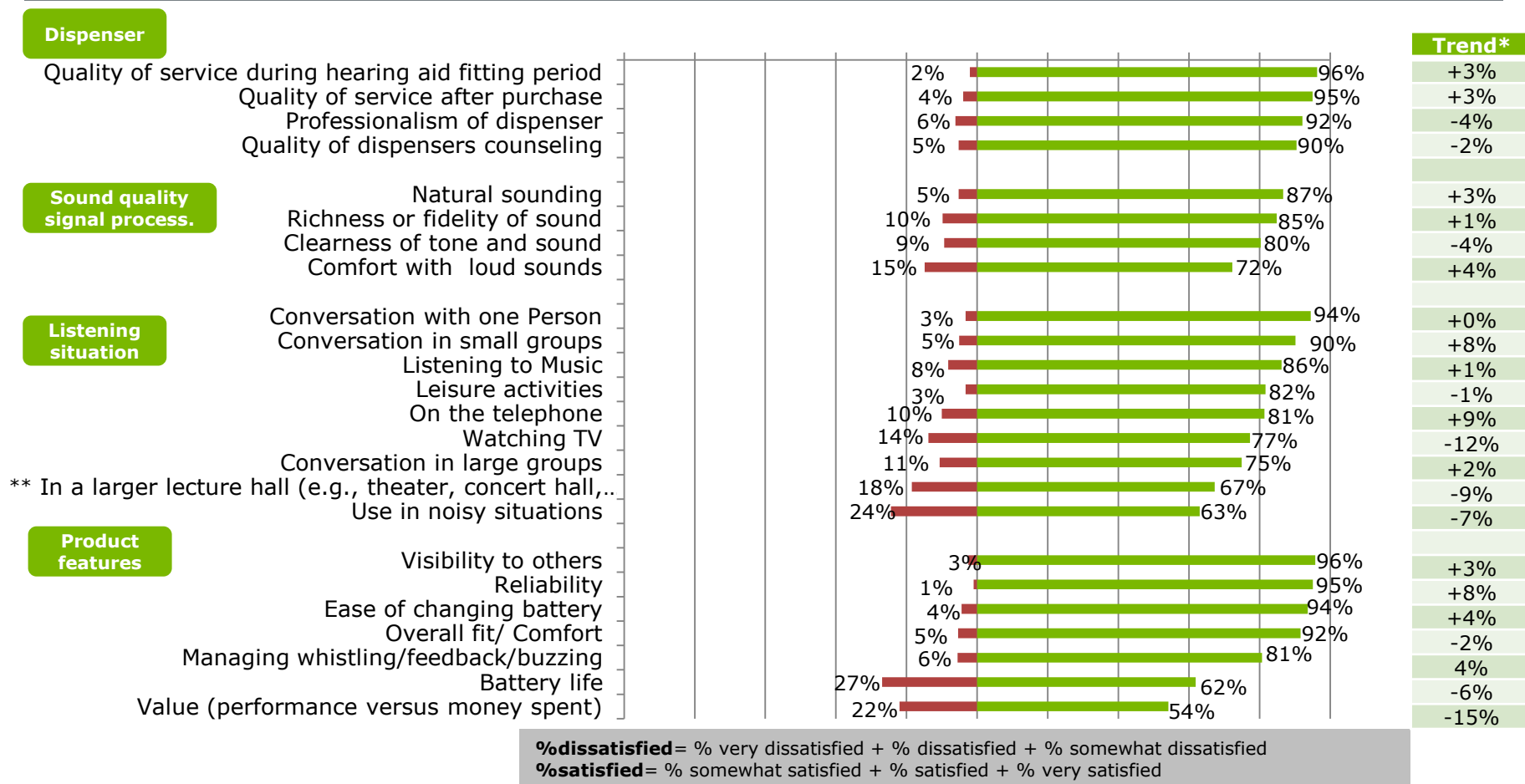


% of satisfied HA owners compared to EuroTrak 2012

\*\* question slightly changed: 2012=Understanding a lecture in a large public place

HA-owner, n=619

# Satisfaction with hearing aids bought within the **last two years (2013/14)** compared to **2012 data (bought 2010/2011)**



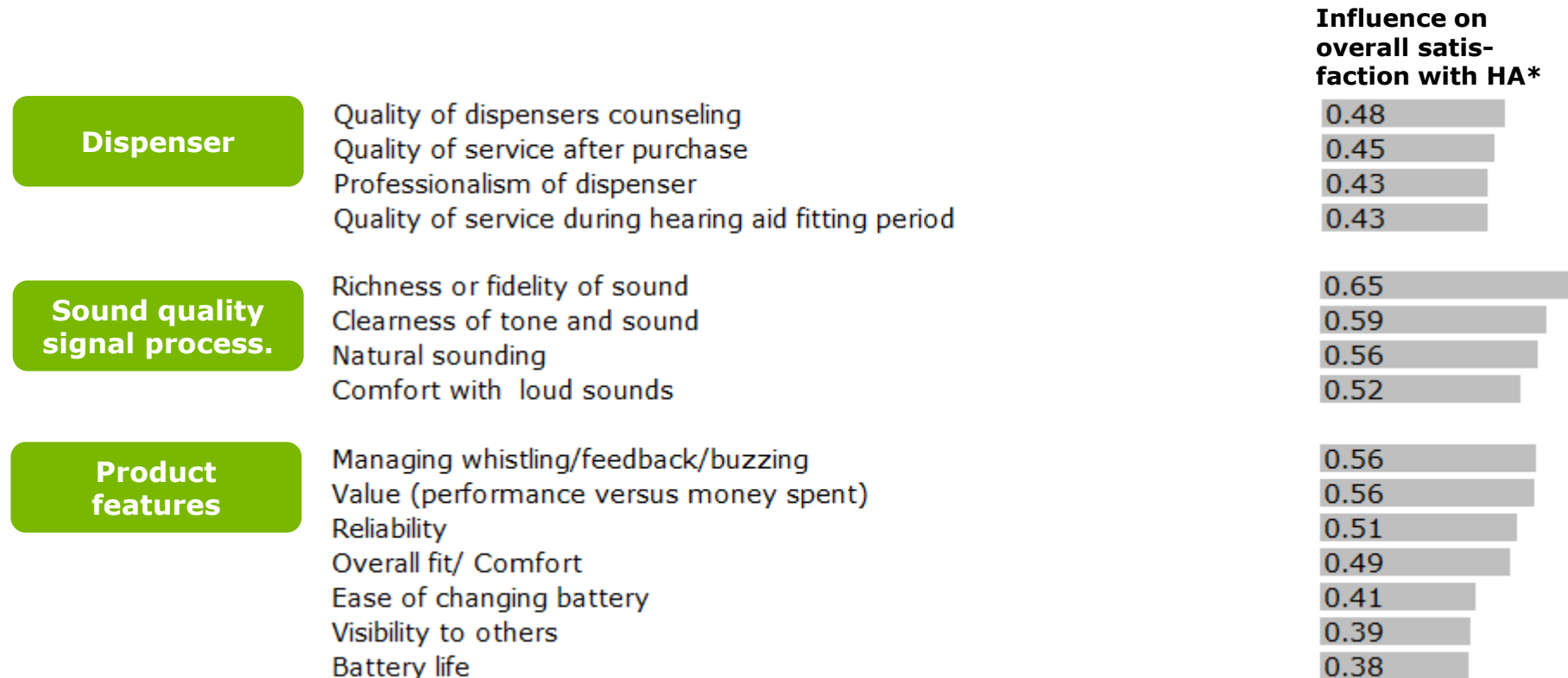
\* % of satisfied HA owners compared to EuroTrak 2012 (bought 2010/11)

\*\* question slightly changed: 2012=Understanding a lecture in a large public place

HA-owner, n=251/n=172



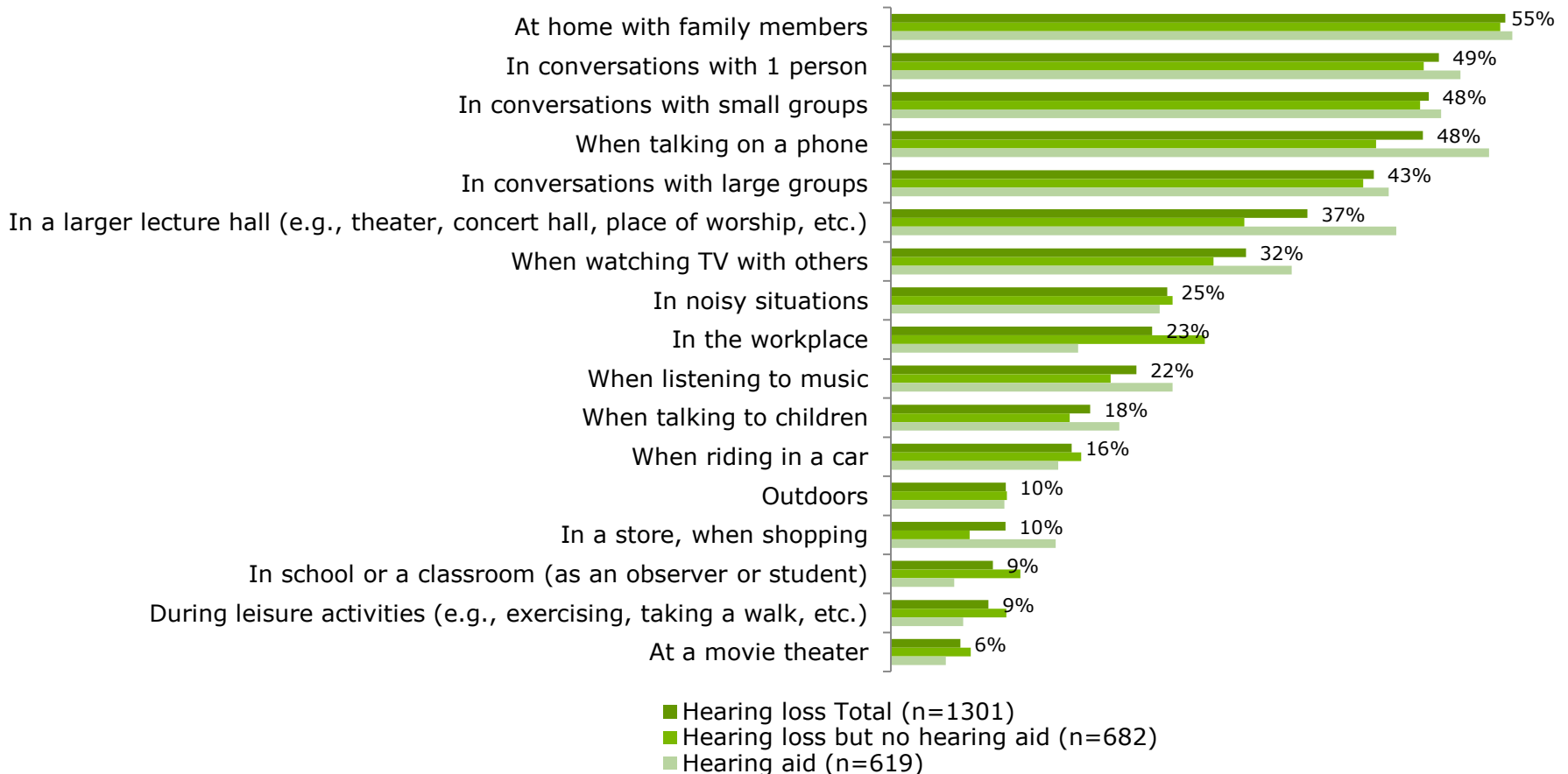
# Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA



\*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction ; 1 means a maximal relationship. Read: richness or fidelity of sound is the most important criterion for satisfaction.

# Frequency of important listening situations

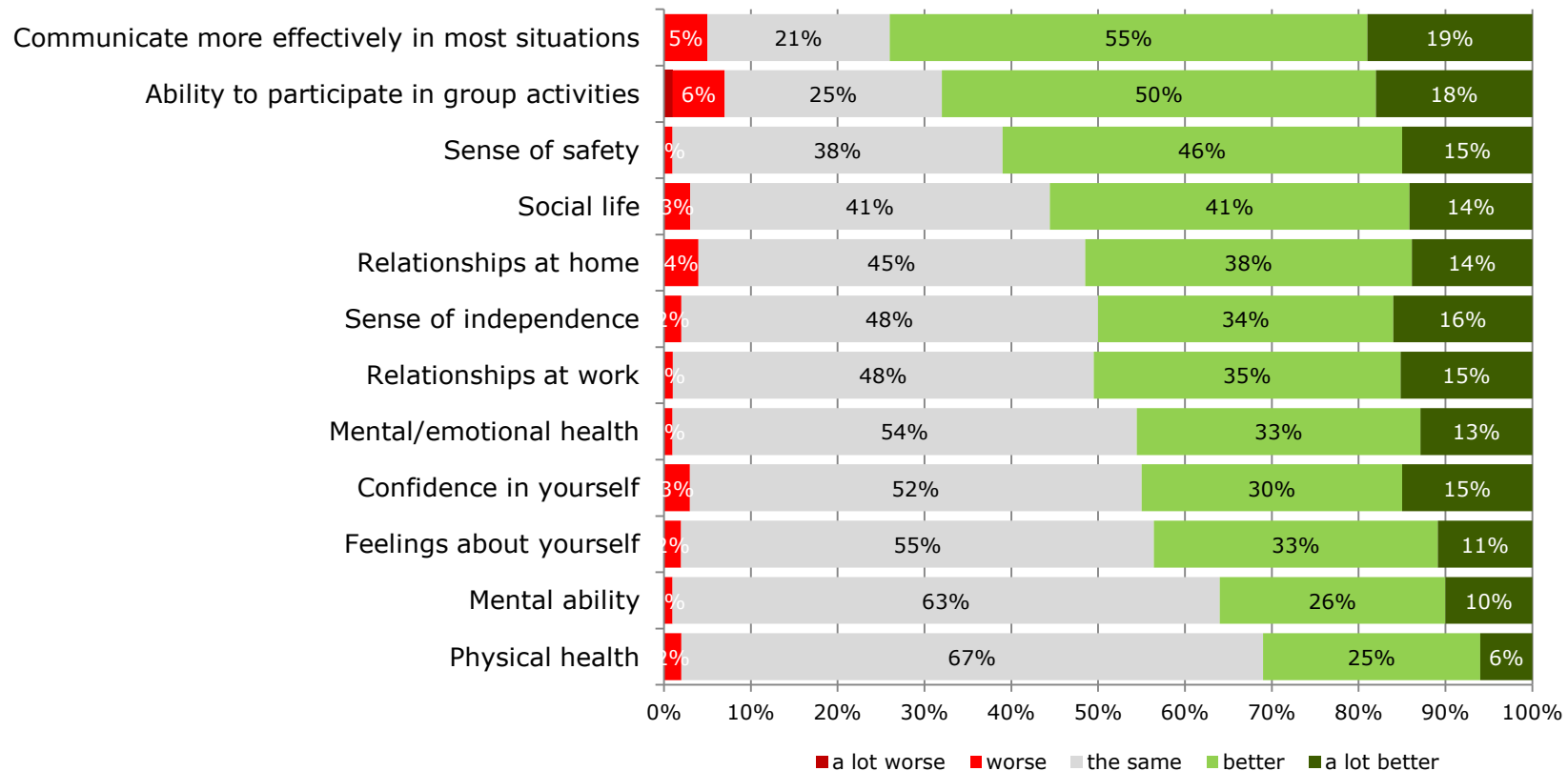
**In which of these situations is it most important for you to hear well?  
(choose up to 5)**



# Positive impact of hearing aids, quality of life

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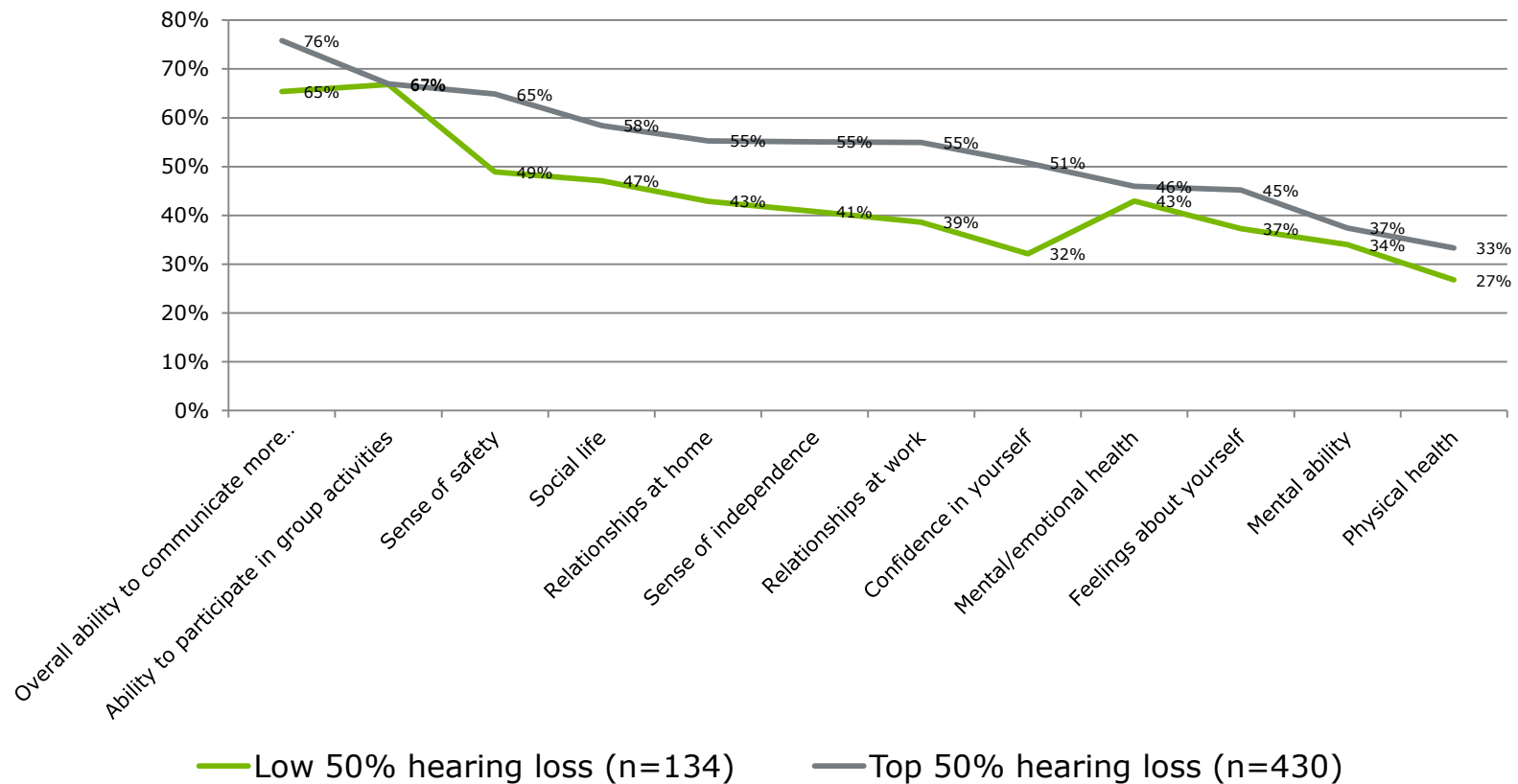
# Significant positive impact of HAs on different aspects – especially communication effectiveness, participating in group activities and sense of safety have improved



HA-owner, n=619

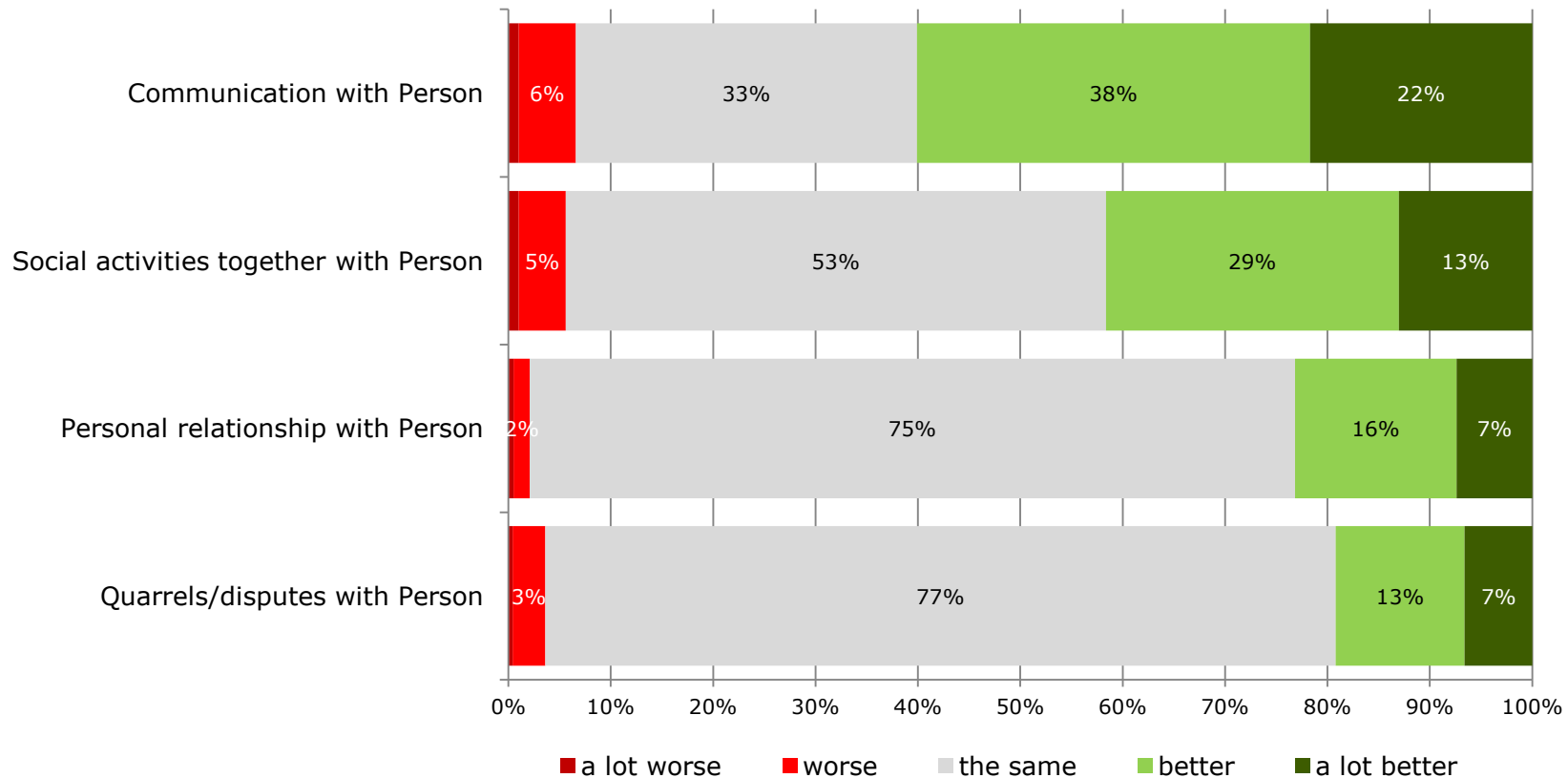
# Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in most aspects

**% of HA owners feeling better/a lot better**



# For the significant others, the situation has improved, since person in household/parent is wearing hearing aids

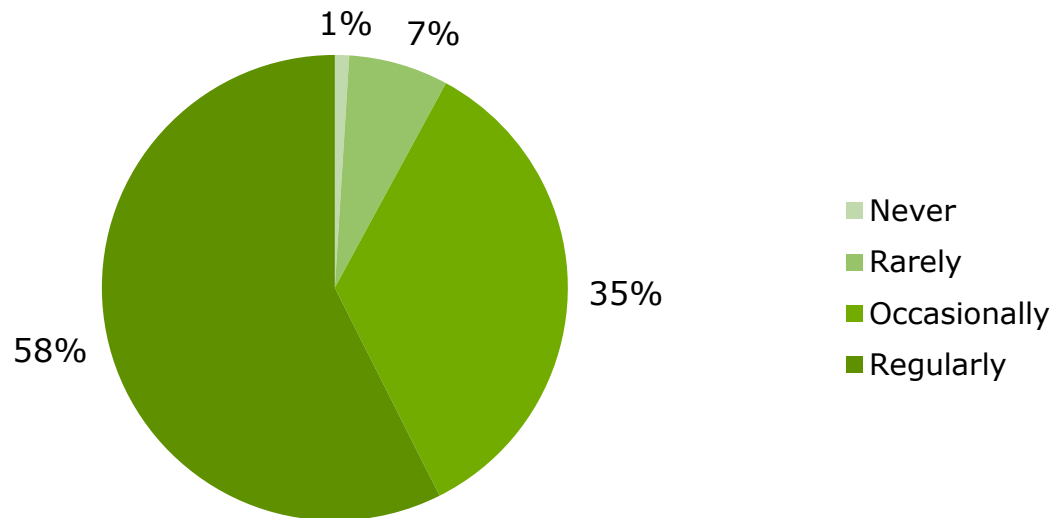
**How did the following aspects change since person X is wearing hearing aids?**



Someone in HH / parent has HA, n=538

# 99% 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?



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



# Reasons for not having hearing aids and why some people can consider hearing aids as uncomfortable

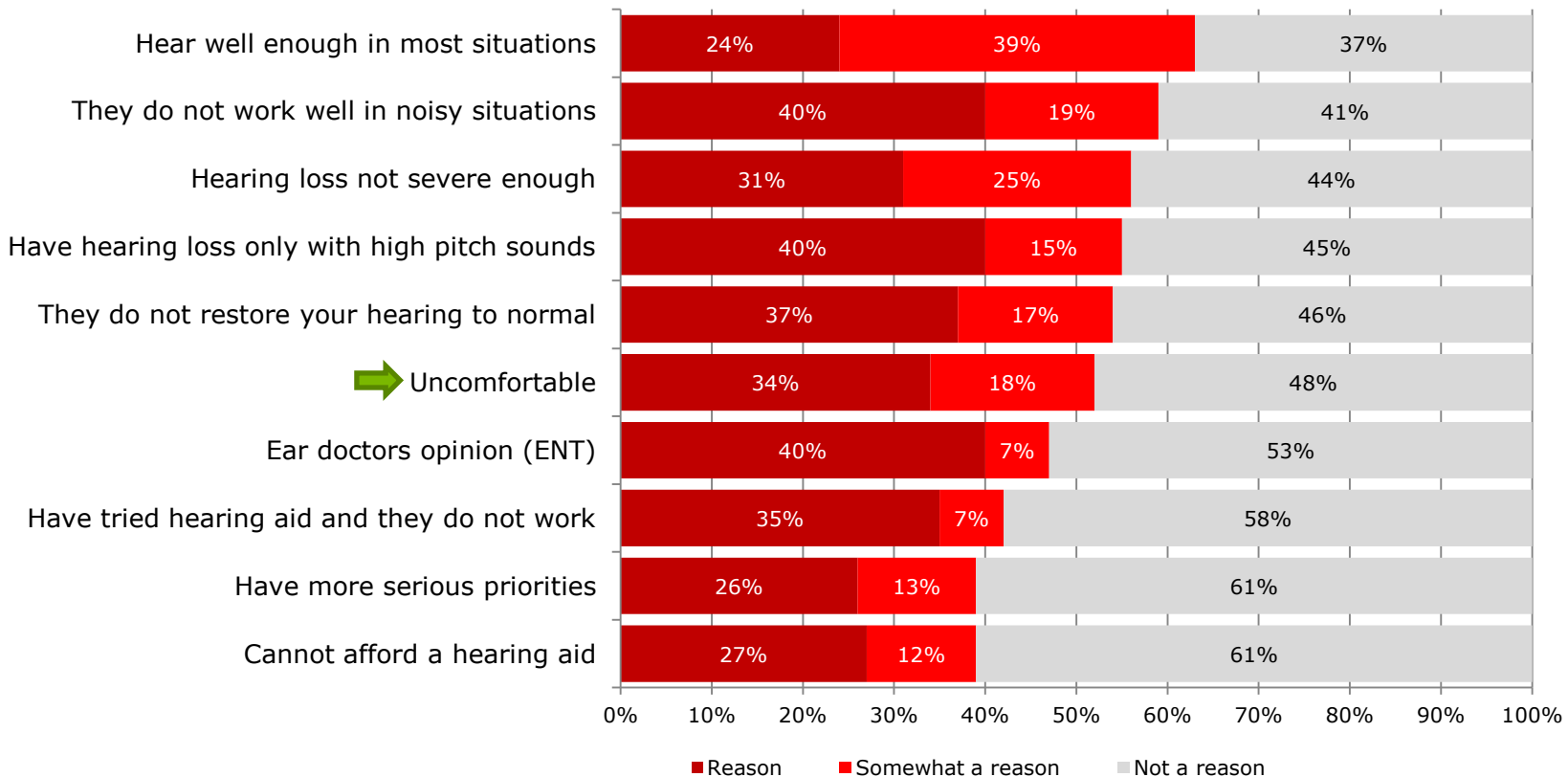
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To analyse reasons of non-adoption we look at the Top 50% HL group, as the structure of hearing loss is more similar to that of HA owners

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

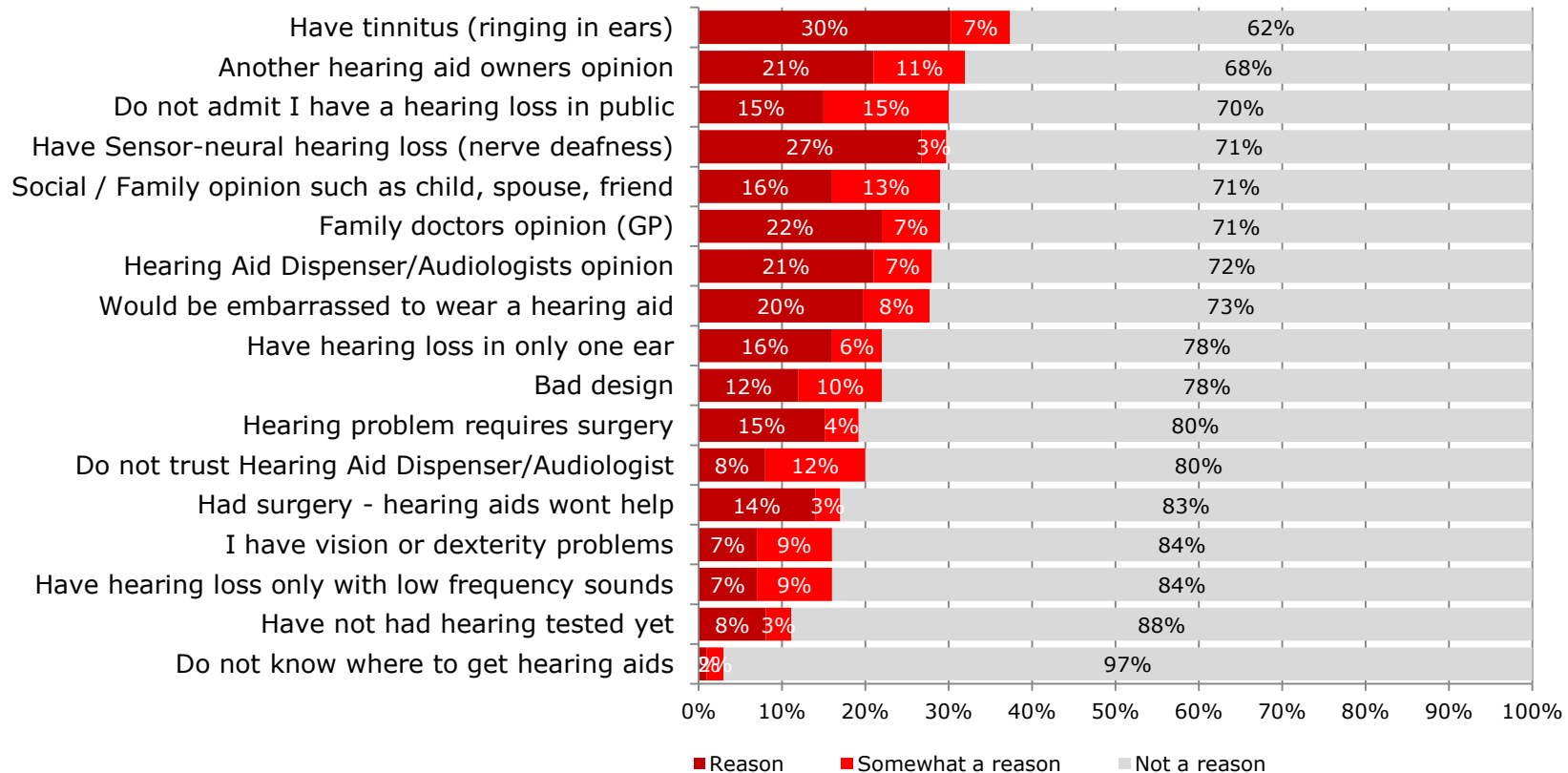
	% HA Owner (n=616)	%HA-Non- owner Low 50% HL (n=416)	%HA-Non- owner Top 50% HL (n=140)
<b>Ears impaired</b>			
Unilateral loss	14%	48%	24%
Bilateral loss	86%	52%	76%
<b>Perceived loss</b>		More similar hearing loss- structure	
Mild	11%	56%	12%
Moderate	61%	37%	64%
Severe	25%	3%	16%
Profound	4%	3%	7%

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

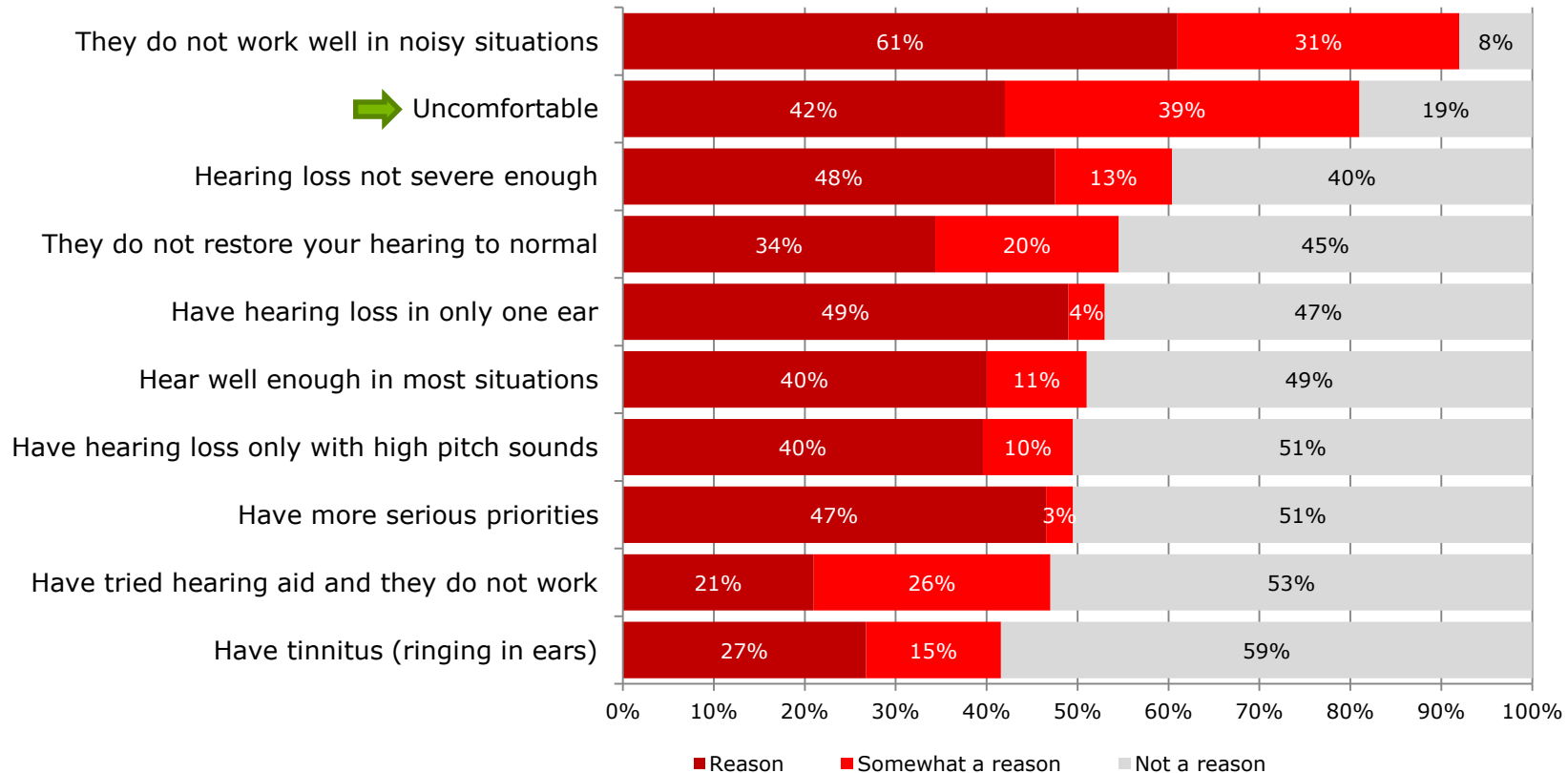


Base: non owners Top 50% HL: n=140

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



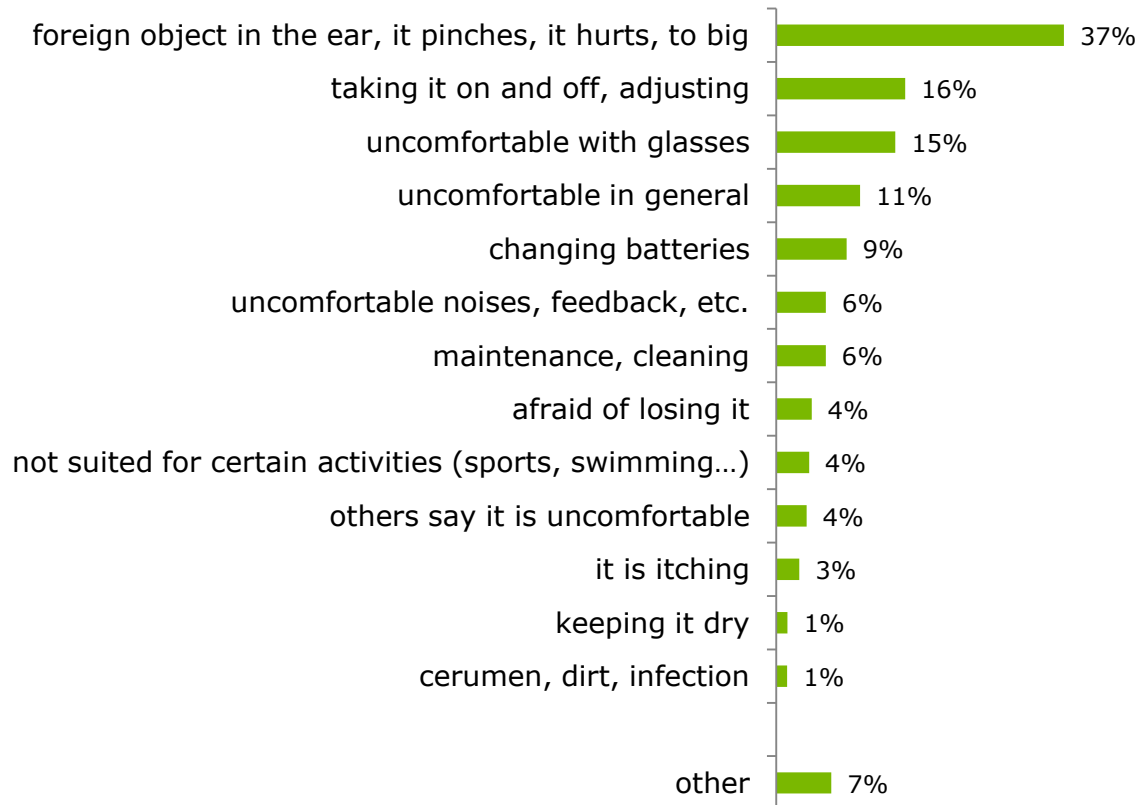
# Top 10 reasons for HA owners NOT using them



Owners who don't use, n=20

# Meaning of «uncomfortable» (open question)

**You mentioned "uncomfortable" as a reason why you don't use your hearing aid(s). Please describe in detail why you consider your hearing aids uncomfortable.**



Base: n=232

# Why hearing aids can be considered as uncomfortable



- Anpassen, Reinigen, Komplizierte Handhabung, Batteriewechsel
- An- und ausziehen, bei Regen sollte es nicht nass werden, Batterien kaufen und wechseln
- Einstellungen ändern

- empfindlicher äusserer Gehörgang
- Ich reagiere sehr schnell auf Druck oder Reibung.

- bin Brillenträger - und dann noch ein Hörgerät...
- Habe auch Probleme eine passende Brille zu finden.

- Stelle mir das so vor..
- Ein Gerät zu tragen, kann nie bequem sein.
- Ich vermute, dass es nicht so bequem ist, ein Gerät zu tragen.
- Beim Sportbetreiben, Schwimmen, Turnen sehr unbequem denke ich.
- Die Nebengeräusche sind sehr unangenehm Denke ich. Dies haben Bekannte mir eindeutig bestätigt.
- ...



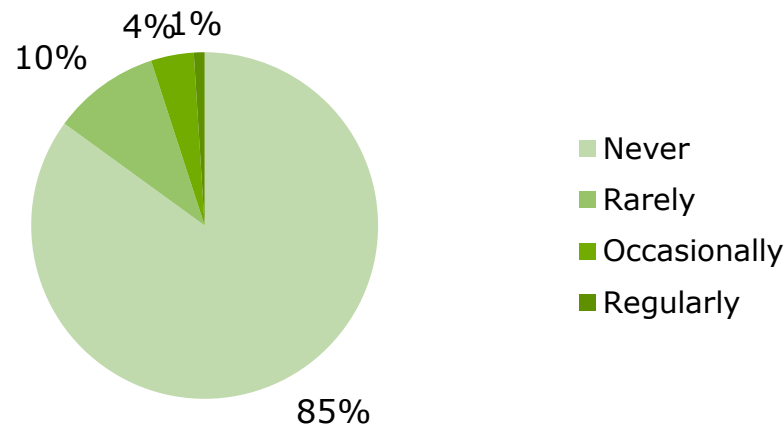
# Social rejection because of hearing loss compared to the acceptance of hearing aids

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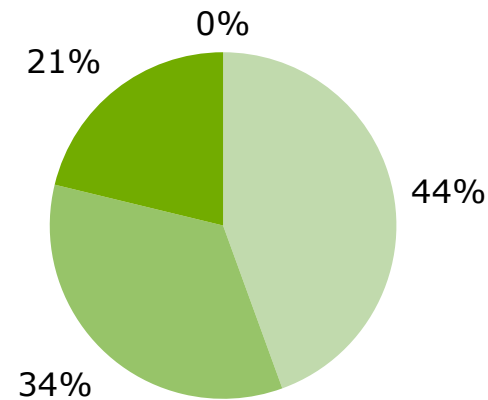


95% of hearing aid owners think people don't make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

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



**Hearing impaired non-owners:  
How often do you feel you are  
made fun of or rejected because  
your hearing loss?**

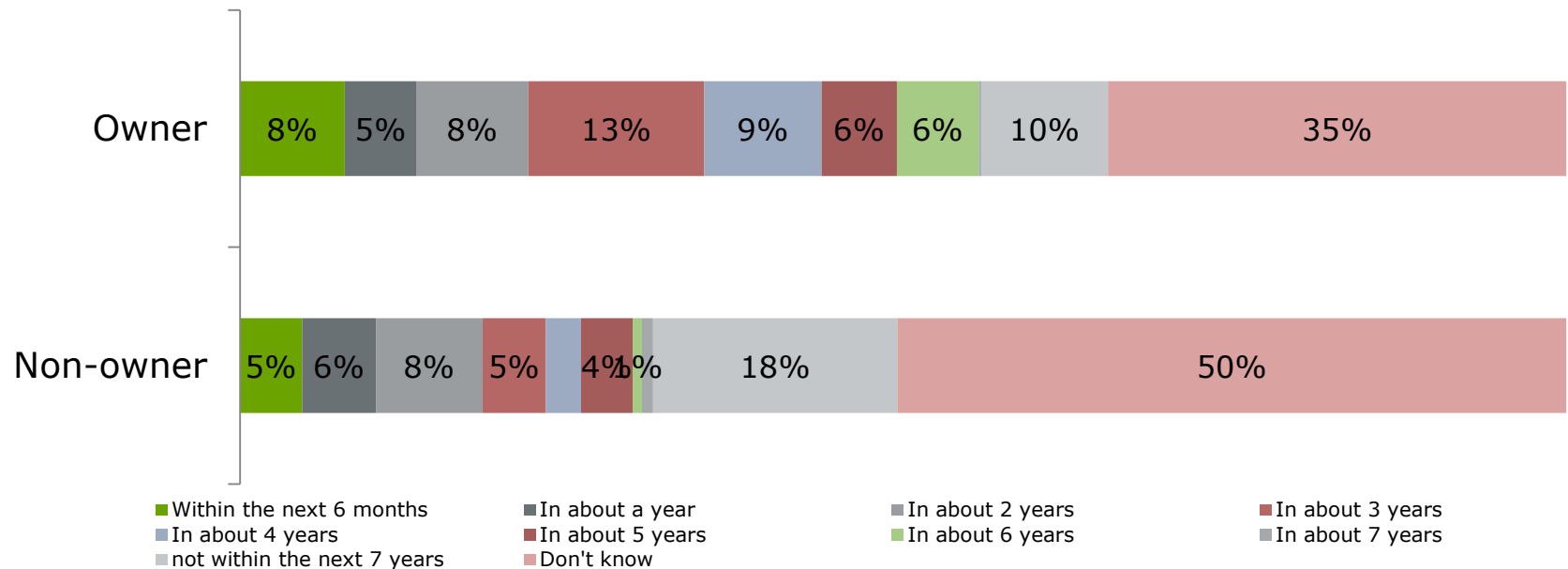


# Buying intentions and most important triggers to buy

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# 11% (2012:7%) of non-owners intend to get a hearing aid within the next year. Re-buying intention is higher than first-buying intention

**Buying intention hearing impaired in %**

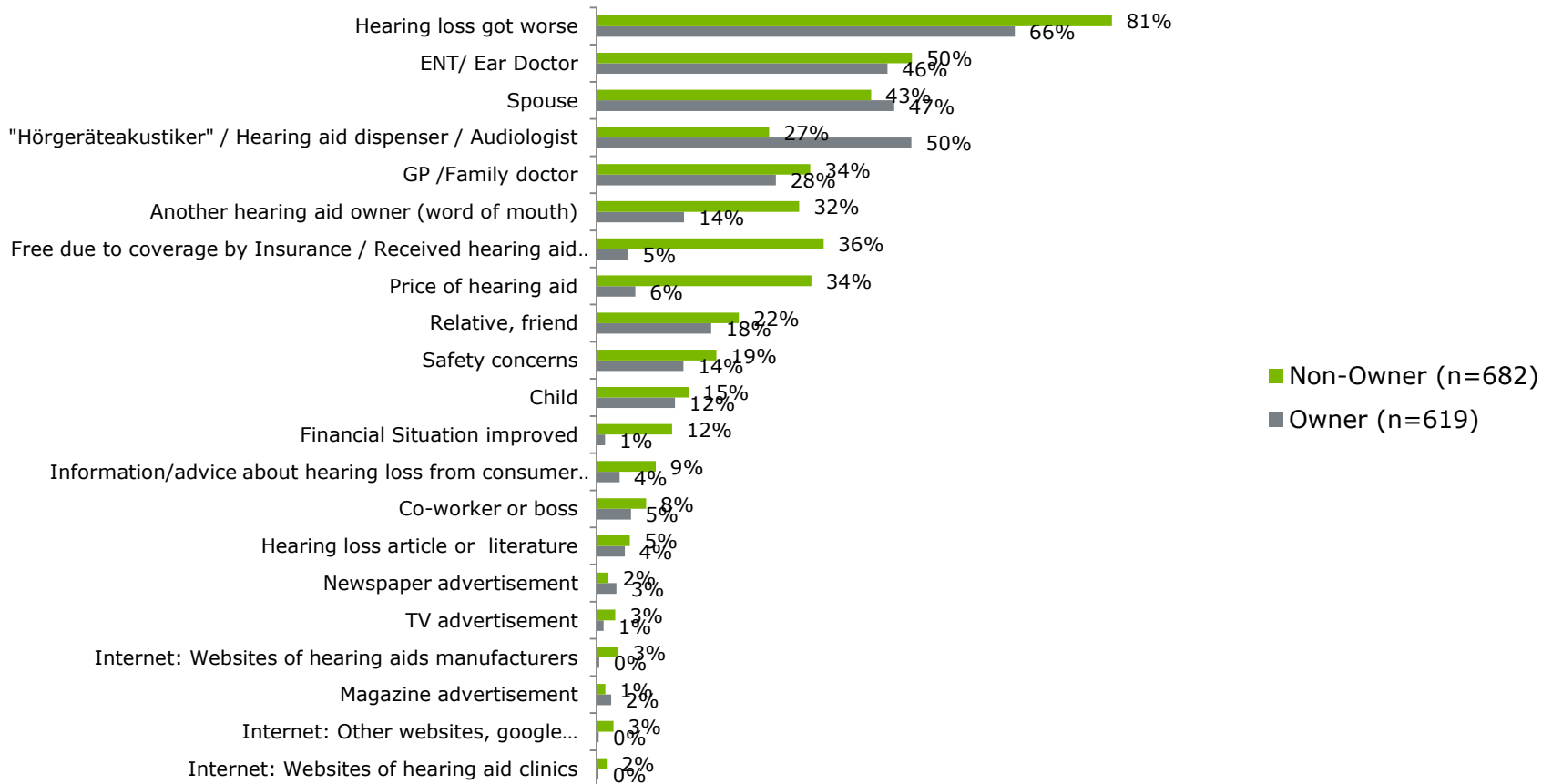


HA-non-owner, n=682  
HA-owner, n=619

# The most important influencing factors are worsening hearing loss, ENT and significant others

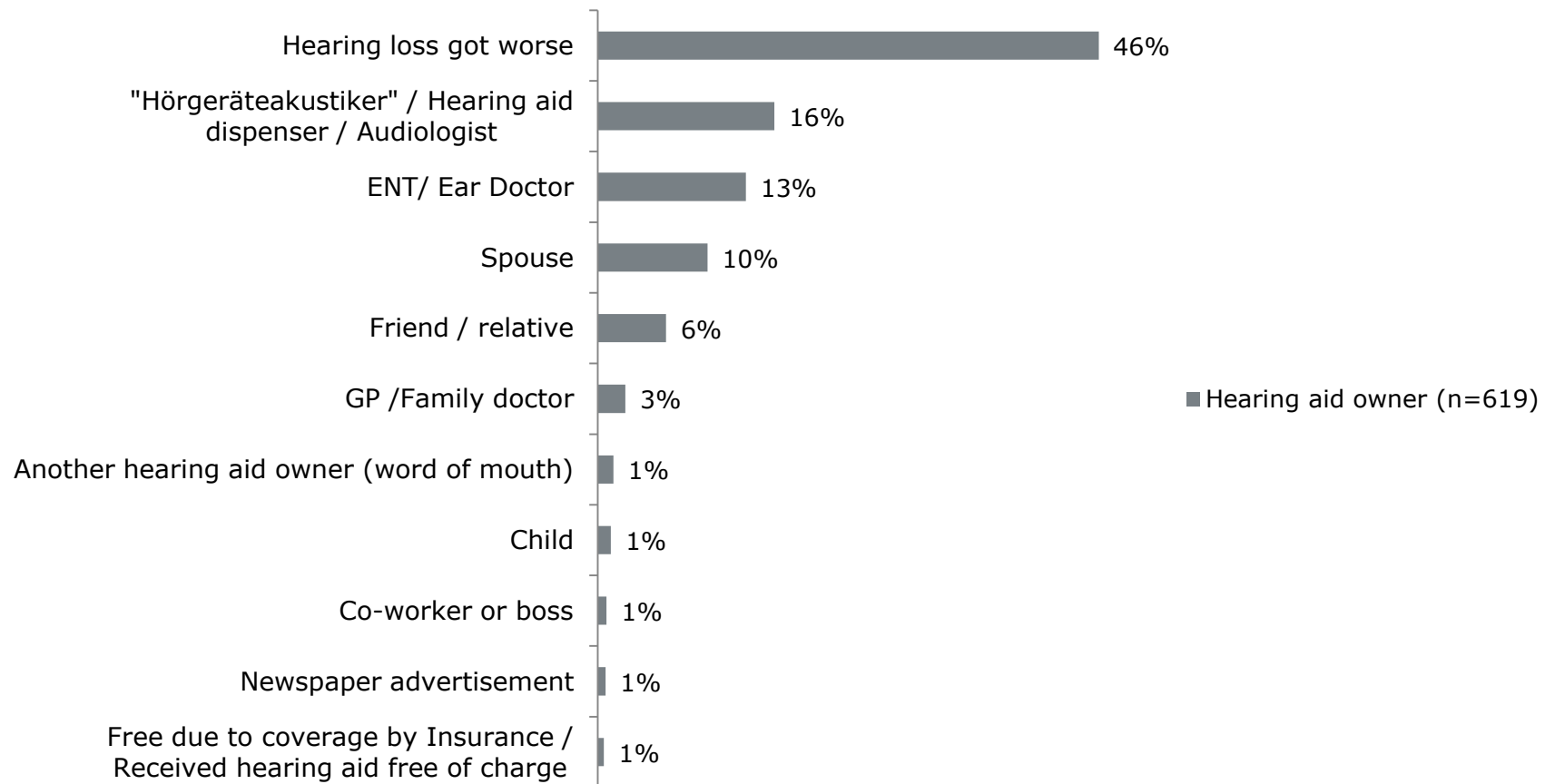
**Non-owner:** Think about the option to obtain / purchase a hearing aid. What do you think would influence you to obtain / purchase a hearing aid ?

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



# The most important trigger to buy a hearing aid when the hearing loss gets worse is still the audiologist

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

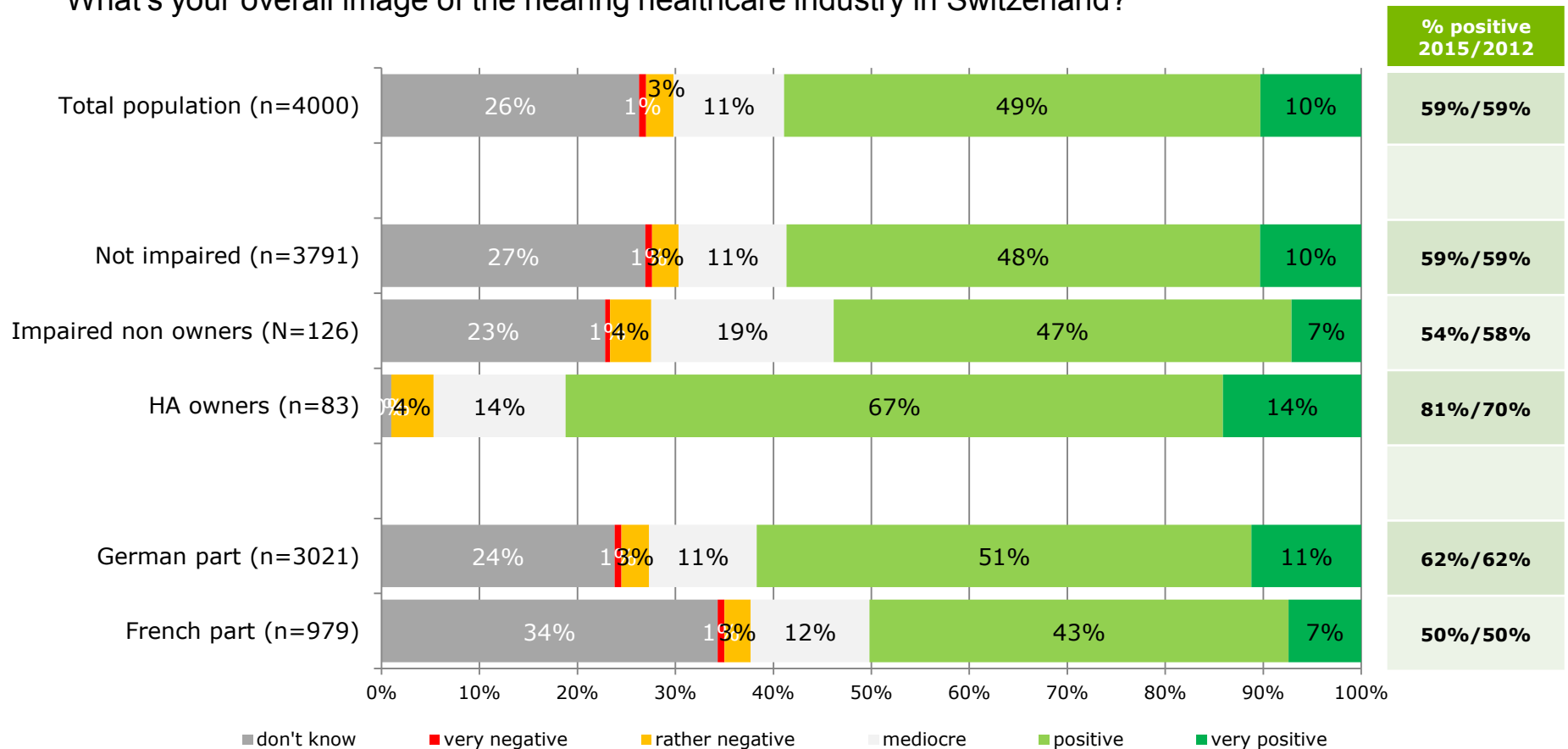


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## 5. Switzerland-specific questions

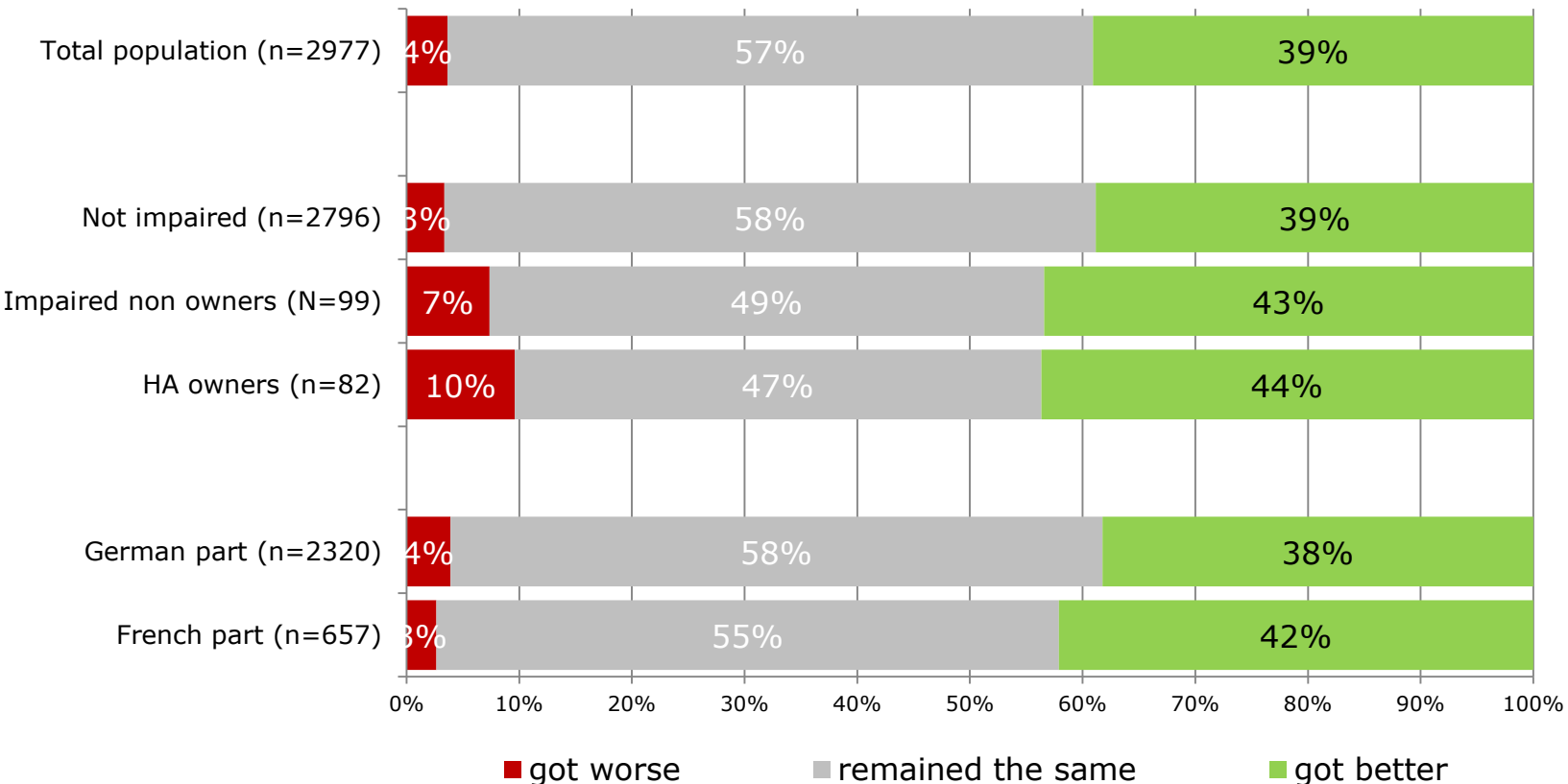
# Only 4% of the people in Switzerland have a negative image of the hearing healthcare industry

What's your overall image of the hearing healthcare industry in Switzerland?



# 39% state that the overall image of the hearing healthcare industry in Switzerland got better

How did the overall image of the hearing healthcare industry in Switzerland change in the last few years?







## Reasons image got worse (open ended question)



2012



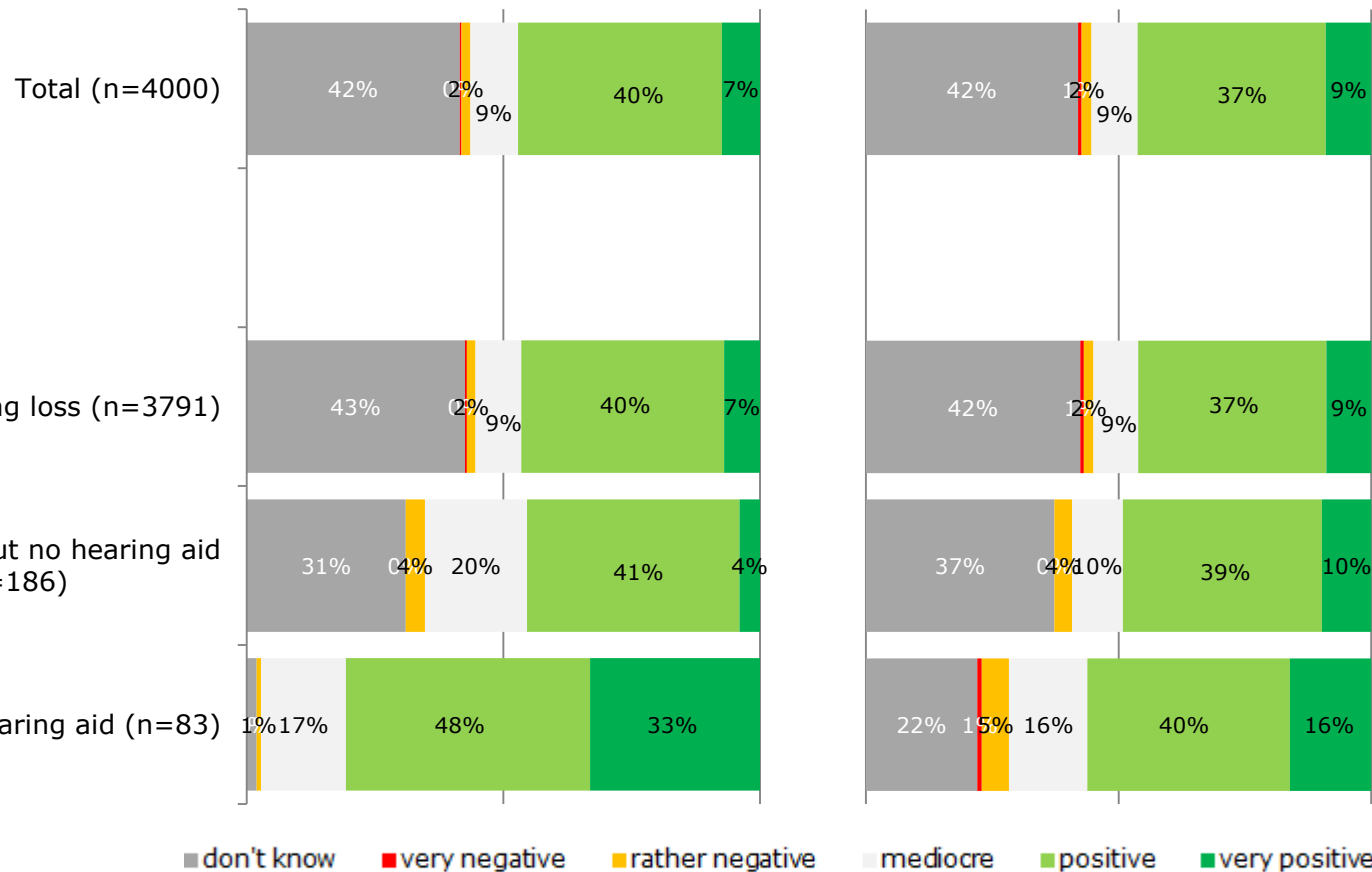
# The image of the audiologists is better than the image of the manufacturers among HA owners (general population rates those 2 groups equally)

## Image

**Audiologists**

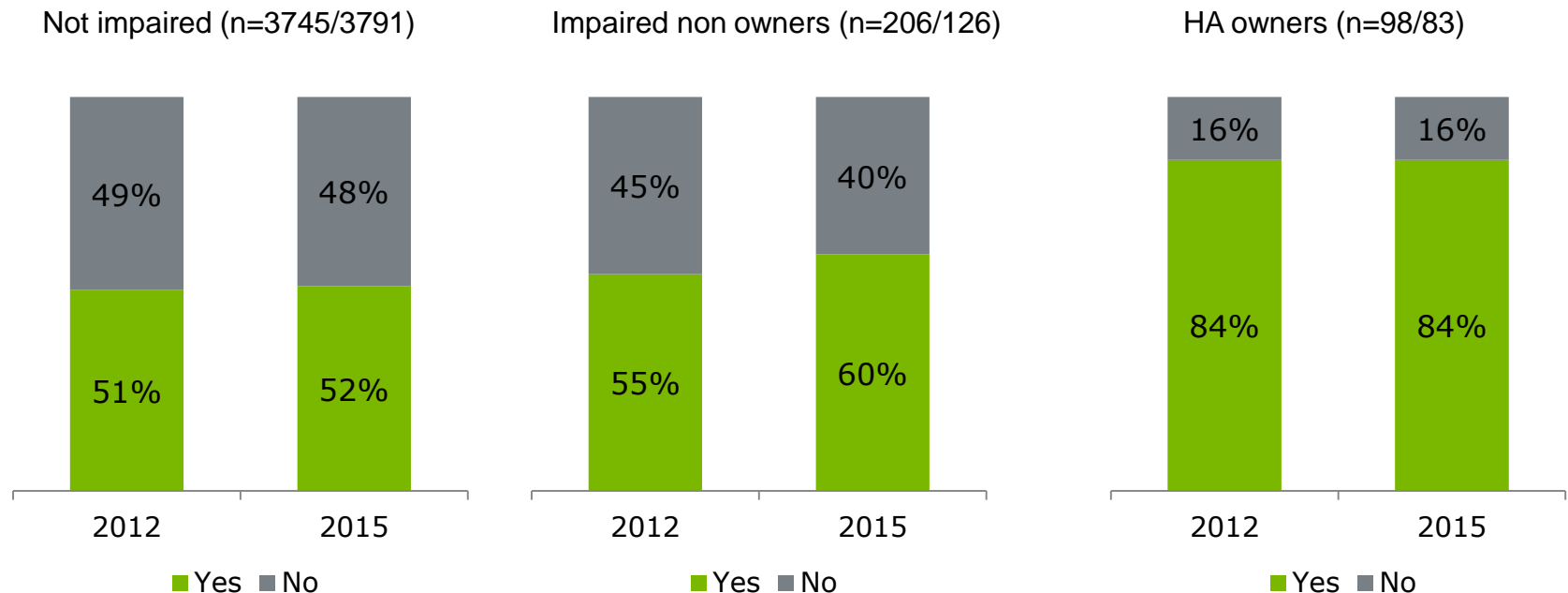
vs.

**hearing aid manufacturers**



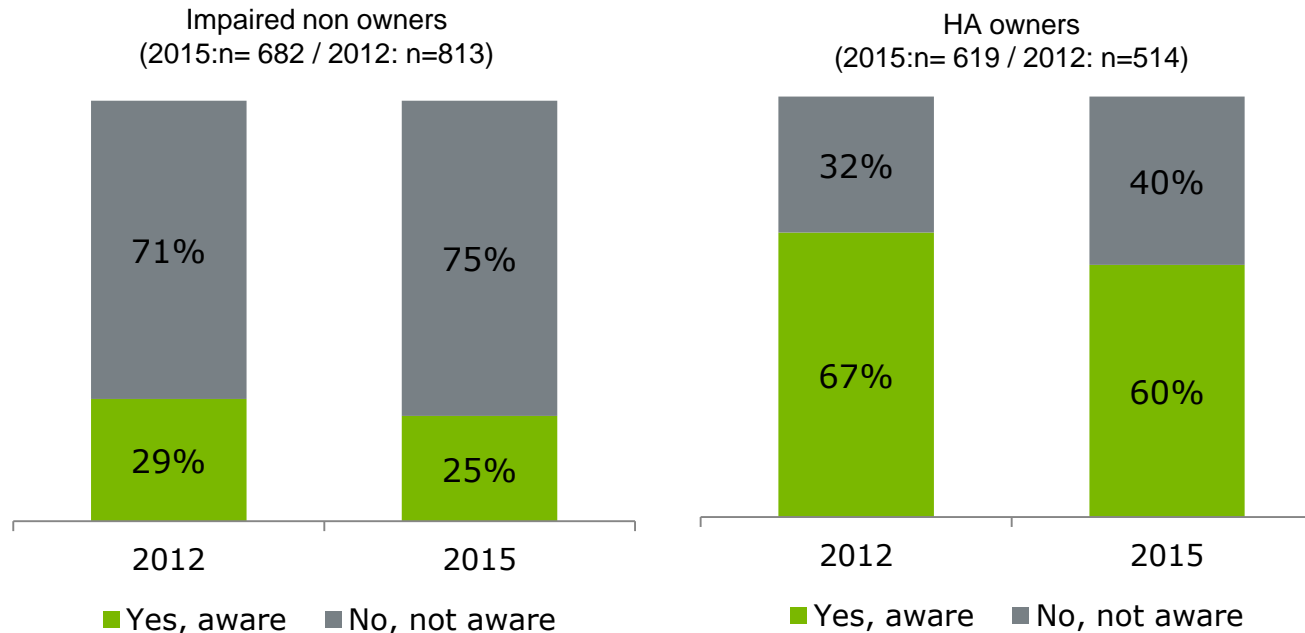
# Around 50% of the non owners are not aware of the distinction between audiologists and hearing aid manufacturers

Were you aware of the distinction between audiologists and hearing aid manufacturers?



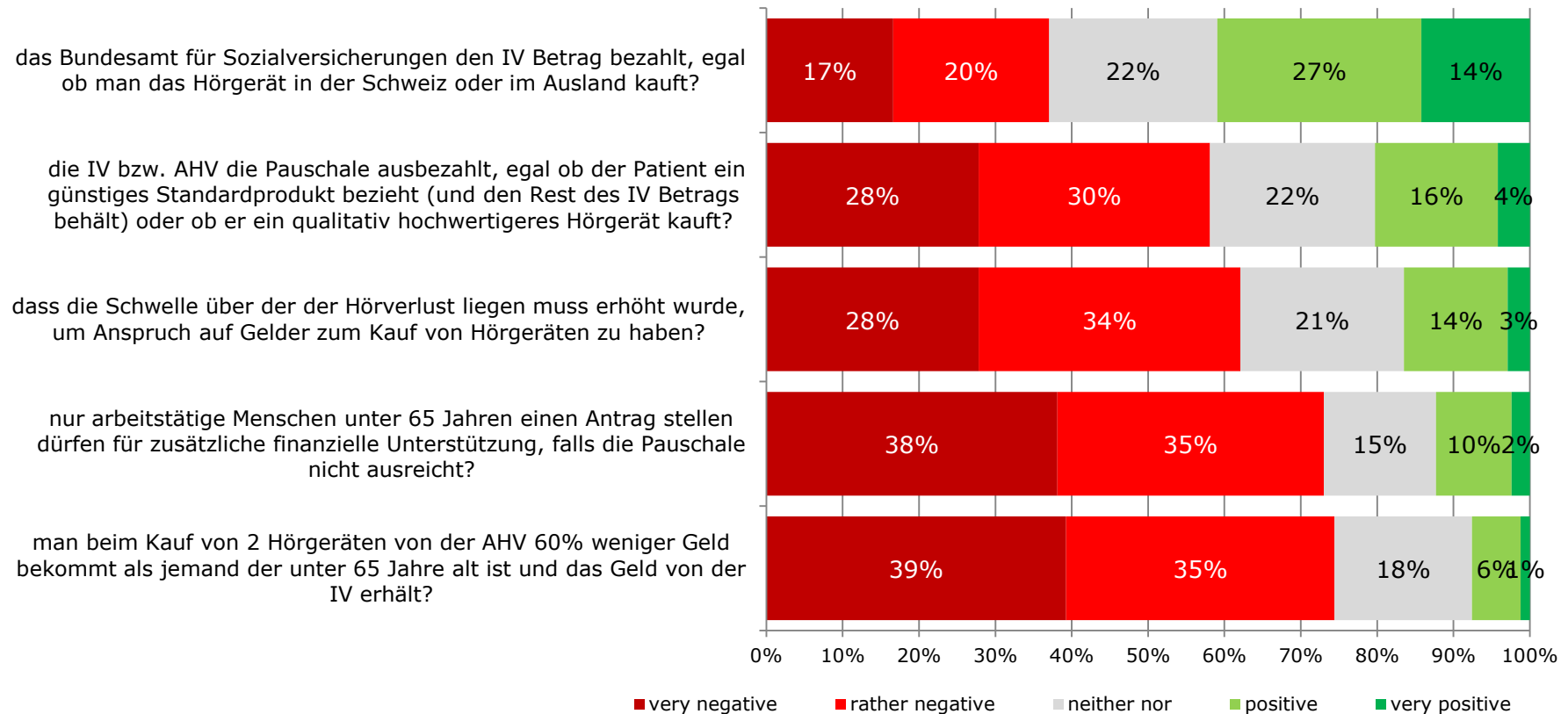
# The awareness of the new compensation system is much higher among HA owners, but decreased since 2011

**Awareness Pauschalvergütung:** Seit dem 1. Juli 2011 werden Hörgeräte nur noch pauschal durch die IV bzw. die AHV vergütet, um Kosten zu sparen. Neu erhält man einen festgelegten, tieferen Pauschalbetrag, unabhängig von den effektiven Kosten des gewählten Hörgeräts. Entscheidet man sich z.B. für ein günstiges Gerät, dessen Preis unterhalb dieses Pauschalbetrags liegt, so darf man den Differenzbetrag behalten. War Ihnen diese neue Pauschalvergütung bekannt?



# The majority of hearing impaired people disapproves of most of the cost saving activities which come with the new compensation system

Unten sehen Sie ein paar Aussagen zum neuen Vergütungssystem von Hörgeräten in der Schweiz. Wie beurteilen Sie, dass zum Kosten sparen.....



Base: n=1'327 (hearing impaired owners and non owners)



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# APPENDIX

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# 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 of in an interval  $\pm 3.1$  around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

Sample size	Random sample error	
	Real value is within interval:	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
50	$\pm 13.9$	$\pm 9.9$
100	$\pm 9.8$	$\pm 7.0$
250	$\pm 6.2$	$\pm 4.4$
500	$\pm 4.4$	<b><math>\pm 3.1</math></b>
1000	$\pm 3.1$	$\pm 2.2$
5'000	$\pm 1.4$	$\pm 1.0$
10'000	$\pm 1.0$	$\pm 0.7$

# Demographics (1) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%\*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Gender</b>						
Male	7200	9.2%	38.6%	48.8%	59.3%	52.7%
Female	7370	6.9%	45.1%	51.2%	40.7%	47.3%
<b>Age recoded</b>						
1 - 14	2170	0.7%	12.5%	16.1%	1.9%	0.4%
15 - 24	1683	1.7%	21.9%	12.3%	3.4%	1.3%
25 - 34	1994	2.0%	13.3%	14.6%	5.2%	1.1%
35 - 44	2085	3.6%	19.1%	15.0%	8.8%	3.0%
45 - 54	2309	5.2%	18.4%	16.3%	14.2%	4.5%
55 - 64	1765	10.5%	28.4%	11.8%	19.4%	10.9%
65 - 74	1376	20.1%	42.7%	8.2%	23.2%	24.4%
74+	1189	35.9%	61.6%	5.7%	24.0%	54.4%
<b>Type of household</b>						
single household	1710	13.4%	52.4%	11.1%	15.9%	24.8%
Couple, no kids	4385	12.0%	45.4%	28.8%	41.9%	49.3%
Couple with kid(s)	6608	3.7%	24.4%	47.5%	27.2%	12.4%
Single mom/dad with kid(s)	606	3.7%	10.7%	4.4%	2.9%	0.5%
Retirement home, hospital etc.	130	48.6%	51.2%	0.5%	4.5%	6.7%
Other	1130	7.2%	37.1%	7.8%	7.5%	6.3%

# Demographics (2) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%\*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Status</b>						
The head of the household (alone or together with someone)	7108	11.0%	42.6%	47.6%	68.6%	73.6%
The spouse of the head of the household	2750	8.8%	40.1%	18.9%	22.2%	21.5%
Daughter/son of head of household	3697	1.1%	16.3%	27.5%	5.0%	1.4%
Other Person	840	5.1%	36.6%	6.0%	4.2%	3.5%
<b>Employment</b>						
Full time employed	4840	5.2%	19.3%	41.2%	30.1%	10.0%
Part time employed	2604	4.7%	25.8%	22.3%	13.5%	6.5%
Unemployed / not working	630	3.9%	32.2%	5.4%	2.5%	1.6%
Retired under a disability pension scheme (fully or partly)	185	10.6%	42.4%	1.5%	1.7%	1.7%
Early retired under an early retirement benefit scheme	515	21.8%	46.6%	3.6%	8.9%	10.8%
Retired (at the official retirement age)	2221	27.1%	54.7%	14.5%	40.7%	68.5%
Student / pupil / in training	1303	1.6%	17.5%	11.5%	2.6%	0.8%
<b>Education</b>						
Primarschule	494	19.4%	46.8%	3.6%	7.6%	9.3%
Sekundarschule	932	14.0%	51.1%	7.2%	9.5%	13.9%
Berufsschule	4097	10.5%	41.7%	32.9%	37.6%	37.3%
Mittelschule	1336	6.8%	38.9%	11.2%	8.3%	7.4%
Seminar, Technikum, HWV	1327	9.3%	44.3%	10.8%	10.3%	11.4%
Universität, ETH, Hochschule	3556	6.3%	35.0%	29.9%	21.7%	16.2%
Anderes	557	9.8%	39.2%	4.5%	4.9%	4.4%