Results

JapanTrak 2015

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

1. Introduction

- JapanTrak 2015 was designed and executed by Anovum (Zurich) on behalf of Japan Hearing Instruments Manufacturers Association (JHIMA).

- Sample sizes Japan 2015:
  - Representative sample (sample 1): n= 14’316 people
  - Hearing impaired (sample 2):
    - Hearing impaired non-owners: n= 890 people with hearing loss (HL)
    - HA owners: n= 416 people with hearing aid (HA)

- JapanTrak 2015 is equivalent to the EuroTrak studies:
Summary

2. Market overview

• Stated hearing loss prevalence
  - Total: 11.3 %, 18+: 13.1% (2012: 10.9%, 18+: 12.8%).
  - Binaural hearing loss: HA owners: 83%, HA non-owners: 60%.
  - Hearing Tests: 51% (2012: 49%) had a hearing test in the last 5 years, most tests done by ENTs and family doctors.

• Hearing aid adoption rate (HA penetration)
  - Total: 13.5% (2012: 14.1%).
  - Total age group 18+: 12.8% (2012: 14.1%).
  - 46% of HA owners have binaural treatment.

• The route to the hearing aid
  - 40% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 13% got hearing aids recommended from the ENT or family doctor (drop out rate=68% / 2012: 67%).
  - 17% of the GP consultations referred to a hearing aid dispenser, 18% referred to an ENT
  - 51% recommended no action!
  - 16% of ENT consultations referred to an audiologist, 70% 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.
  - Quality of sleep seems to improve if hearing impaired use hearing aids.
Summary

3. Analysis of hearing aid owners

• Hearing aid ownership and usage and accessories
  – 15% (2012: 12%) of all HA owners received some kind of 3rd party reimbursement.
  – 42% of the currently owned HAs were bought in the last two years.
  – The average age of the currently owned HAs is 4.1 years (2012: 3.5 years).
  – The median age of hearing aids before replacement is 5 years (2012: 4 years).
  – On average, HAs are worn 6.8 hours a day (2012: 5.7).
  – 48% of today's hearing aid owners are aware of their hearing aid brand, 48% would preferably choose the same brand if they would plan to obtain new hearing aids (41% are indifferent).
  – TV Box is the most often owned electronic accessory: 11% of hearing aid owners have one – 33% have heard of it but don't own one.

• Importance of listening situations and satisfaction with HAs
  – 60% of the hearing aid owners say their hearing aid works better than or as expected, 40% say they are worse than expected.
  – Overall satisfaction with HA is 39% (2012: 36%).
  – The more hours worn per day, the higher the satisfaction.
  – Talking on a phone and talking at home with family members are the most frequent important listening situations.

• Positive impact of HAs
  – Significant positive impact of HAs on different aspects – especially sense of safety, communication and feelings about yourself.
  – 84% 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
  – Only 9% of the hearing impaired without hearing aids know the system of supplying hearing aid(s) by the government (2012: 6%).
  – The main reasons for not using hearing aids are that people say they are uncomfortable, they do not restore hearing to normal and their hearing loss is not severe enough.
  – Uncomfortable means to them: “not necessary yet in daily life”, foreign object in the ear”, “it pinches”, “it hurts”, “it is too big”.
  – 7% who own HAs don’t use them at all (0 hour); 23% use them less than one hour/day (0-1 hour).

• Social rejection, buying intentions and triggers to buy
  – 68% 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 aids.
  – The most important influencing factors for getting hearing aids are worsening hearing loss, ENT, spouse/child and hearing aid center. Price of hearing aids is only relevant for the non owners.
  – 6% (2012: 4%) of non-owners intend to get a hearing aid within the next year.

• Hearing aid centers, doctors and optical shops are the most important sources of information and therefore the major gatekeepers – followed by the internet.
Results

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Detailed Results: Roadmap

New topics for JapanTrak 2015 are highlighted in red

1. Introduction
   - Organisation of JapanTrak 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
   - 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. Appendix
   - Demographics: Hearing instrument adoption rates and populations
1. Introduction
Organisation of JapanTrak 2015

Organisation

- JapanTrak is the Japanese equivalent to the EuroTrak studies.
- Principal of the project JapanTrak is Japan Hearing Instruments Manufacturers Association (JHIMA). Members of JHIMA are: bernafon, CORTITON, GNresound, NJH (New Japan Hearing), Oticon, PANASONIC, Phonak, RION, Sivantos (Siemens), Starkey, Widex [JHIMA Companies].
- Anovum Zurich developed the concept of JapanTrak, 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.
- Anovum and JHIMA adapted the EuroTrak questionnaire for JapanTrak. JHIMA translated the questionnaire into Japanese.

Use of the data

- The principal as well as the JHIMA 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 JHIMA 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 – JapanTrak 2015/n=[relevant sample size]”
- The principal and JHIMA companies can ask Anovum to further analyse the raw data in specific ways at their own expense.
Recruitment process: In search of hearing impaired people

**Step 1: Screening interviews**

Objective: Prevalence of hearing loss and hearing aid ownership

Process:
1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)
2. Contacts from panelist pools of more than 40’000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of n= 14’316 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=890 hearing aid owners and n=416 hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age

- **Women:**
  - Unimpaired non-owner
  - Impaired non-user
  - HA owner

- **Men:**
  - Unimpaired non-owner
  - Impaired non-user
  - HA owner

Age groups:
- <= 14
- 15 - 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 - 64
- 65 - 74
- 74+
Hearing loss prevalence Japan

% hearing loss prevalence

- Total
  - Total 18+
  - 74+
  - 65-74
  - 55-64
  - 45-54
  - 35-44
  - 25-34
  - 15-24
  - <=14

JapanTrak 2015
Base: 14’316

JapanTrak 2012
Base: 15’036

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Overview hearing loss prevalence and hearing aid adoption

<table>
<thead>
<tr>
<th></th>
<th>JapanTrak 2015</th>
<th>JapanTrak 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing impaired (stated)</td>
<td>11.3%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Adoption (% of population)</td>
<td>1.5%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Adoption (% of stated impaired)</td>
<td>13.5%</td>
<td>14.1%</td>
</tr>
</tbody>
</table>

© Anovum 2015 - JapanTrak 2015
Hearing aid adoption rate Japan: 14% (rounded) of hearing impaired have hearing aid(s), 46% of them have binaural treatment.
Most people with only one hearing aid believe it is the same effect compared with two hearing aids.

**Do you wear hearing aids monaurally or binaurally?**

- 42% Monaurally (in one ear)
- 58% Binaurally (in both ears)

**What are the reasons why you wear hearing aids only in one ear (monaural)?**

- I believe it is the same effect compared with binaural: 37%
- Shortage of budget: 26%
- Recommendation of the hearing aid dispenser: 22%
- Recommendation of the doctor (GP or ENT): 13%
- I have only hearing difficulties in one ear: 11%
- Other: 17%

75% of those who wear monaurally have binaural loss!

Base: N=416/242 – step2

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

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unilateral loss</td>
<td>40% (40%)</td>
<td>17% (24%)</td>
<td>8% (11%)</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>60% (60%)</td>
<td>83% (76%)</td>
<td>21% (21%)</td>
</tr>
</tbody>
</table>

### Perceived loss

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mild</td>
<td>44% (35%)</td>
<td>18% (17%)</td>
<td>7% (8%)</td>
</tr>
<tr>
<td>Moderate</td>
<td>48% (60%)</td>
<td>54% (56%)</td>
<td>17% (14%)</td>
</tr>
<tr>
<td>Severe</td>
<td>7% (4%)</td>
<td>23% (24%)</td>
<td>37% (47%)*</td>
</tr>
<tr>
<td>Profound</td>
<td>1% (2%)</td>
<td>5% (3%)</td>
<td></td>
</tr>
</tbody>
</table>

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
Hearing Tests: 51% (2012: 49%) had a hearing test in the last 5 years, most tests are done at medical check-ups.

Have you ever taken a hearing test?

- Yes, in the last 12 months: 35%
- Yes, in the last 1-5 years: 34%
- Yes, more than 5 years ago: 16%
- No, never: 15%

Where/how was your hearing tested?

- Ear doctor (ENT): 28%
- Family doctor: 23%
- Hearing Aid Dispenser/Audiologist: 2%
- Online test: 1%
- Test on a smartphone App: 1%
- Other: 42%
- don't know: 7%

Most „other“ mentions: Medical check-up (offered by the company)

Base=8'951
Base= 4'744
The route to the hearing aid: Sources of information and drop-out rates
Hearing aid centers, doctors and optical shops are the most important sources of information and therefore the major gatekeepers.

Where did you gather information about hearing aids?
Please check all that apply.
(This question included Japan-specific answers.)

<table>
<thead>
<tr>
<th>Source</th>
<th>Hearing Loss Total (n=1'306)</th>
<th>Hearing Aid (n=416)</th>
<th>Hearing Loss but no hearing aid (n=890)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing Aid Center</td>
<td>36%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Family doctor, ear doctor (ENT)</td>
<td>37%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Optical shop</td>
<td>11%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Internet research combined</td>
<td>22%</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Articles in magazines or newspapers</td>
<td>15%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Internet research: websites of hearing aids manufacturers</td>
<td>15%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Print ads received in your mailbox</td>
<td>10%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Conversations with friends/relatives already fitted with a hearing aid</td>
<td>15%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Friend / relative</td>
<td>15%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Internet research: other websites, google...</td>
<td>8%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Spouse</td>
<td>10%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Internet research: websites of hearing aid clinics</td>
<td>9%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Child</td>
<td>9%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Other shop</td>
<td>5%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>I did not gather information about hearing aids</td>
<td>60%</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Of those who discussed the hearing loss with a doctor, 80% talked to an ENT first and 20% 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

Base: n=1'306

- Impaired: 100%
- ENT/Doctor: 40%
- Recommend: 13%
- Discussed hearing loss with HA dispenser/audiologist: 16%
- Positive advice HA dispenser/audiologist: 14%
- Bought hearing aid: 14%

Drop out:
- 2012: 60%
- 2012: 68%

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

Top 50% hearing loss*

Low 50% hearing loss*

* 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?

<table>
<thead>
<tr>
<th>% Discussed with GP</th>
<th>What did he/she recommend?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total hearing impaired</strong></td>
<td><strong>HA owner (Base: 240)</strong></td>
</tr>
<tr>
<td>29%</td>
<td>Referred to a hearing aid dispenser / audiologist: 39%</td>
</tr>
<tr>
<td>30%</td>
<td>Referred to an ear doctor (ENT): 13%</td>
</tr>
<tr>
<td><strong>HA owner</strong></td>
<td>Recommended to get a hearing aid: 68%</td>
</tr>
<tr>
<td>64%</td>
<td>Recommended no further action: 9%</td>
</tr>
<tr>
<td><strong>Hearing impaired non-owners</strong></td>
<td><strong>Impaired non-owner (Base: 219)</strong></td>
</tr>
<tr>
<td>24%</td>
<td>Referred to a hearing aid dispenser / audiologist: 8%</td>
</tr>
<tr>
<td>25%</td>
<td>Referred to an ear doctor (ENT): 20%</td>
</tr>
<tr>
<td>59%</td>
<td>Recommended to get a hearing aid: 7%</td>
</tr>
<tr>
<td></td>
<td>Recommended no further action: 69%</td>
</tr>
</tbody>
</table>

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JapanTrak 2015
Base: 1'216

JapanTrak 2012
Base: 1'348
The route to the hearing aid: ENT
Have you discussed your hearing problem with an ear doctor (ENT)?

% Discussed with ENT

<table>
<thead>
<tr>
<th></th>
<th>Total hearing impaired</th>
<th>HA owner</th>
<th>Hearing impaired non-owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did discuss</td>
<td>34%</td>
<td>70%</td>
<td>29%</td>
</tr>
<tr>
<td>Did not discuss</td>
<td>66%</td>
<td>30%</td>
<td>71%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

<table>
<thead>
<tr>
<th></th>
<th>HA owner (Base: 282)</th>
<th>Impaired non-owner (Base: 300)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did prescribe a hearing aid</td>
<td>65%</td>
<td>7%</td>
</tr>
<tr>
<td>Referred to a hearing aid dispenser / audiologist</td>
<td>40%</td>
<td>7%</td>
</tr>
<tr>
<td>Recommended no further action</td>
<td>19%</td>
<td>88%</td>
</tr>
</tbody>
</table>

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The route to the hearing aid: HA dispenser

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

% Discussed with Audiologist

<table>
<thead>
<tr>
<th>Total hearing impaired</th>
<th>HA owner</th>
<th>Impaired non-owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>16%</td>
<td>70%</td>
<td>8%</td>
</tr>
<tr>
<td>15%</td>
<td>74%</td>
<td>5%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

HA owner (Base: 257)

- Recommended to get a hearing aid: 99%
- Recommended not to get a hearing aid: 1%

Impaired non-owner (Base: 64)

- Recommended to get a hearing aid: 77%
- Recommended not to get a hearing aid: 23%

JapanTrak 2015
Base: 1'266

JapanTrak 2012
Base: 1'348

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Recommendations by profession

- **GP (N=459)**
  - Referred to an ear doctor (ENT): 18\%
  - Referred to a hearing aid dispenser / audiologist: 17\%
  - Recommended to get a hearing aid: 51\%
  - Recommended no further action: 25\%

- **ENT (N=582)**
  - Referred to an ear doctor (ENT): 16\%
  - Referred to a hearing aid dispenser / audiologist: 22\%
  - Recommended to get a hearing aid: 70\%
  - Recommended no further action: 11\%

- **Audiologist (N=321)**
  - Referred to an ear doctor (ENT): 89\%
  - Referred to a hearing aid dispenser / audiologist: 11\%
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality
**Work competitiveness:** 90% 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?**

- 57% Of significant use
- 33% Of some use
- 10% Of no use

Base: N=153
**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.

---

**I think that people with an untreated hearing loss tend to be less promoted in their job**

**I think that people with an untreated hearing loss tend not to get the job they deserve**

**I think that people with an untreated hearing loss tend to be under salaried**

Base: Hearing loss, no hearing aid =769/ hearing aid n=382
**General 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.

<table>
<thead>
<tr>
<th>Condition</th>
<th>Disagree strongly</th>
<th>Rather disagree</th>
<th>Neutral</th>
<th>Rather agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In the evenings I often feel physically exhausted</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing aid</td>
<td>12%</td>
<td>30%</td>
<td>16%</td>
<td>33%</td>
<td>8%</td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>10%</td>
<td>21%</td>
<td>16%</td>
<td>42%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>In the evenings I often feel mentally exhausted</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing aid</td>
<td>21%</td>
<td>24%</td>
<td>19%</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>13%</td>
<td>26%</td>
<td>18%</td>
<td>33%</td>
<td>11%</td>
</tr>
</tbody>
</table>

*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).
**General health problems:** Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) and 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

<table>
<thead>
<tr>
<th></th>
<th>Depression</th>
<th>No depression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing aid</td>
<td>15%</td>
<td>85%</td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>19%</td>
<td>81%</td>
</tr>
</tbody>
</table>

### Dementia symptom:
Getting more forgetful in the last year?

<table>
<thead>
<tr>
<th></th>
<th>Yes, much more</th>
<th>Yes, somewhat more</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing aid</td>
<td>9%</td>
<td>55%</td>
<td>36%</td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>10%</td>
<td>66%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Base: hearing aid n=351 / no hearing aid =145

*Construction of 6-groups: A factor analysis was performed to identify one factor “degree of hearing loss”. The following questions were included in the factor:
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

*People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).*
General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?

- Top 50% hearing loss, no hearing aid (n=145)
  - No: 56%
  - Yes: 44%

- Hearing aid (n=351)
  - No: 70%
  - Yes: 30%
3. Analysis of hearing aid owners
Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
Low adoption rates within mild and moderate hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profound</td>
<td>(2%)</td>
<td>2015</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1%</td>
</tr>
<tr>
<td>Severe</td>
<td>(10%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>6%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(49%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>41%</td>
</tr>
<tr>
<td>Mild</td>
<td>(40%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>37%</td>
</tr>
</tbody>
</table>

Base: n= 1'180
Sums can differ from 100% due to rounding
* combined “severe” and “profound” because n is too small
42% of the currently owned HAs were bought in the last two years

Age of currently owned HAs (Mean):
2015: 4.1 years
2012: 3.5 years
On average 4-6 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 5 years before they are being replaced.

**Current HAs = first HAs?**

- Yes: 51%
- No: 48%

HA-owner, n=416

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

- 1-3 years: 37%
- 4-6 years: 33%
- 7-10 years: 23%
- 11 years or longer: 6%

Base: n=195

Age of HA before it has been replaced:
- 2015: 5 years (median)
- 2012: 4 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? (Scale recoded)**

- 1 year: 14%
- 2 years: 14%
- 3 years: 21%
- 4-6 years: 27%
- more than 6 years: 24%

Base: n=221
People are around 70 years old when they feel the need for a hearing aid.

How old were you when you felt the need for a hearing aid?

- 1-44: 25%
- 45-54: 7%
- 55-64: 23%
- 65-74: 12%
- 75-84: 5%
- >85: 5%

Median: 70 years

Base: N=416
45% of the HA owners have 1-2 hearing aids.

How many hearing aids have you used so far including the current hearing aids? (one pair counts as one)

- 1-2: 45%
- 3-4: 33%
- 5-6: 15%
- >6: 7%

Base: N=416
Binaural treatment by purchase date

<table>
<thead>
<tr>
<th>Year of Purchase</th>
<th>% Ownership of Binaural Hearing Aids / Base=All Owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>JT 2015: 2013/2014 (n=172)</td>
<td>44%</td>
</tr>
<tr>
<td>JT 2012: 2012/2011 (n=117)</td>
<td>39%</td>
</tr>
<tr>
<td>JT 2012: 2010/2009 (n=117)</td>
<td>36%</td>
</tr>
<tr>
<td>JT 2012: 2009 or earlier (n=180)</td>
<td>38%</td>
</tr>
</tbody>
</table>
15% received some kind of reimbursement from the government. Only 9% of non-owners know the system of supplying hearing aid(s) by the government.

**Owners:** Was any part or all of your hearing aid(s) paid by the government?

**Non-owners:** Do you know the system of supplying hearing aid(s) by government?
Generally people are not aware that hearing aids are untaxed articles in the VAT system.

Do you know that hearing aids are untaxed articles in the Japanese Value added Tax system? Total hearing impaired: 12% yes (n=1306)

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>HA owners (n=416)</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>Non-owners (n=890)</td>
<td>7%</td>
<td>93%</td>
</tr>
</tbody>
</table>
On average, HAs are worn 6.8 hours a day

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

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48% of today’s hearing aid owners are aware of their hearing aid brand

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

- Yes, I know it by heart: 48%
- No, but I could find out: 37%
- No, and can't find out: 15%

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

- Preferably from the same brand you currently own: 48%
- Preferably from a different brand than you currently own: 11%
- Indifferent, could be any brand: 41%

Base: N=416 / 374

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76% 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?

<table>
<thead>
<tr>
<th>Year</th>
<th>Never</th>
<th>Once</th>
<th>2-3 times</th>
<th>4-5 times</th>
<th>More often</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>63%</td>
<td>13%</td>
<td>19%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>2012</td>
<td>66%</td>
<td>11%</td>
<td>15%</td>
<td>5%</td>
<td>3%</td>
</tr>
</tbody>
</table>

HA-owner:
2015: n=419
2012: n=450
Awareness and usage of accessories
TV Box is the most often owned electronic accessory: 11% of hearing aid owners have one – 33% have heard of it but don’t own one.

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

- TV Box connected to the tv set to stream audio to your hearing aid: 57% heard of it, 33% own one, 11% never heard of it.
- Additional microphone for conversations with one person, conversations in a group etc.: 75% heard of it, 18% own one, 7% never heard of it.
- Phone clip, plugged into the mobile phone to stream calls to the hearing aid: 74% heard of it, 23% own one, 3% never heard of it.
- Combined device - audio streamer and remote control in one device: 77% heard of it, 19% own one, 3% never heard of it.
- Audio streamer to connect my hearing aids to other devices like cell phones, mp3 players, tv sets, etc: 76% heard of it, 22% own one, 2% never heard of it.

Base: N=416
Satisfaction with hearing aids and drivers
60% of the hearing aid owners say their hearing aid works better than or as expected

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

- 50% hearing aids work as I expected
- 40% hearing aids work better than I expected
- 10% hearing aids work worse than I expected

Base: N=416
Overall satisfaction with HA increased from 36% to 39% since 2012

<table>
<thead>
<tr>
<th>Category</th>
<th>Very Satisfied</th>
<th>Dissatisfied</th>
<th>Somewhat Dissatisfied</th>
<th>Neutral</th>
<th>Somewhat Satisfied</th>
<th>Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total HA-user (n=416)</td>
<td>22%</td>
<td>15%</td>
<td>1%</td>
<td>27%</td>
<td>21%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>BTE (n=183)</td>
<td>27%</td>
<td>17%</td>
<td>4%</td>
<td>18%</td>
<td>22%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>ITE/ITC (n=186)</td>
<td>18%</td>
<td>18%</td>
<td>0%</td>
<td>30%</td>
<td>17%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>up to two years old (n=172)</td>
<td>26%</td>
<td>13%</td>
<td>4%</td>
<td>24%</td>
<td>21%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>older than 2 years (n=215)</td>
<td>21%</td>
<td>21%</td>
<td>0%</td>
<td>31%</td>
<td>21%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>HA worn up to 4 hrs/day (n=168)</td>
<td>14%</td>
<td>9%</td>
<td>1%</td>
<td>30%</td>
<td>28%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>HA worn 4-8 hrs/day (n=85)</td>
<td>17%</td>
<td>18%</td>
<td>2%</td>
<td>21%</td>
<td>13%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>HA worn more than 8 hrs/day (n=163)</td>
<td>21%</td>
<td>29%</td>
<td>2%</td>
<td>25%</td>
<td>21%</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>

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Overall satisfaction is higher for people with binaural treatment.

Wear hearing aids in both ears (n=174):
- Very dissatisfied: 5%
- Dissatisfied: 14%
- Somewhat dissatisfied: 17%
- Neutral: 19%
- Somewhat satisfied: 22%
- Satisfied: 22%
- Very satisfied: 2%

Wear hearing aids in one ear (n=242):
- Very dissatisfied: 5%
- Dissatisfied: 6%
- Somewhat dissatisfied: 23%
- Neutral: 32%
- Somewhat satisfied: 22%
- Satisfied: 11%
- Very satisfied: 1%
Satisfaction with hearing aids purchased online is lower than with those purchased in hearing aid centers

Where was your most current hearing aid purchased?

- **Hearing Aid Center** (n=231)
  - very dissatisfied: 5%
  - dissatisfied: 9%
  - somewhat dissatisfied: 21%
  - neutral: 27%
  - somewhat satisfied: 22%
  - satisfied: 15%
  - very satisfied: 1%

- **Optical Shop** (n=60)
  - very dissatisfied: 6%
  - dissatisfied: 8%
  - somewhat dissatisfied: 19%
  - neutral: 27%
  - somewhat satisfied: 20%
  - satisfied: 17%
  - very satisfied: 3%

- **Hospital / Clinic** (n=60)
  - very dissatisfied: 7%
  - dissatisfied: 12%
  - somewhat dissatisfied: 24%
  - neutral: 19%
  - somewhat satisfied: 10%
  - satisfied: 29%
  - very satisfied: 0%

- **Internet** (n=55)
  - very dissatisfied: 17%
  - dissatisfied: 33%
  - somewhat dissatisfied: 20%
  - neutral: 15%
  - somewhat satisfied: 15%
  - satisfied: 14%
  - very satisfied: 1%

- **Mail order**
  - very dissatisfied: 2%
  - dissatisfied: 14%
  - somewhat dissatisfied: 13%
  - neutral: 12%
  - somewhat satisfied: 26%
  - satisfied: 18%
  - very satisfied: 0%

- **Electric shop**
  - very dissatisfied: 1%
  - dissatisfied: 1%
  - somewhat dissatisfied: 1%
  - neutral: 1%
  - somewhat satisfied: 1%
  - satisfied: 1%
  - very satisfied: 1%

- **Administration**
  - very dissatisfied: 1%
  - dissatisfied: 1%
  - somewhat dissatisfied: 1%
  - neutral: 1%
  - somewhat satisfied: 1%
  - satisfied: 1%
  - very satisfied: 1%

- **Other**
  - very dissatisfied: 1%
  - dissatisfied: 1%
  - somewhat dissatisfied: 1%
  - neutral: 1%
  - somewhat satisfied: 1%
  - satisfied: 1%
  - very satisfied: 1%

**Overall satisfaction with Hearing aids**

- Total HA-user (n=416)
  - very dissatisfied: 5%
  - dissatisfied: 9%
  - somewhat dissatisfied: 21%
  - neutral: 27%
  - somewhat satisfied: 22%
  - satisfied: 15%
  - very satisfied: 1%

- **n is too low**
## Overall Satisfaction with HA: Country comparison

<table>
<thead>
<tr>
<th></th>
<th>France</th>
<th>Switzerland</th>
<th>UK</th>
<th>Germany</th>
<th>Denmark</th>
<th>Norway</th>
<th>Italy</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall satisfaction 2009</strong></td>
<td>86%</td>
<td>-</td>
<td>77%</td>
<td>72%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Overall satisfaction 2012</strong></td>
<td>80%</td>
<td>84%</td>
<td>72%</td>
<td>77%</td>
<td>70%</td>
<td>72%</td>
<td>70%</td>
<td>36%</td>
</tr>
<tr>
<td><strong>Overall satisfaction 2015</strong></td>
<td>84%</td>
<td>81%</td>
<td>70%</td>
<td>77%</td>
<td>-</td>
<td>-</td>
<td>79%</td>
<td>39%</td>
</tr>
</tbody>
</table>
Satisfaction with current hearing aids

Dispenser
- Quality of service after purchase
- Quality of service during hearing aid fitting period
- Professionalism of dispenser
- Quality of dispensers counseling

Sound quality
- Comfort with loud sounds
- Clearness of tone and sound
- Richness or fidelity of sound
- Natural sounding

Product features
- Ease of changing battery
- Visibility to others
- Reliability
- Overall fit/ Comfort
- Battery life
- Value (performance versus money spent)
- Managing whistling/feedback/buzzing

Trend*

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* % of satisfied HA owners compared to JapanTrak 2012

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HA-owner, n=416
Satisfaction with current hearing aids

Listening situation

- Conversation with one Person
- Watching TV
- In school or a classroom (as an observer or student)
- Conversation in small groups
- On the telephone
- Listening to Music
- In the workplace
- When riding in a car
- Leisure activities
- Conversation in large groups
- Use in noisy situations
- When talking to children
- Outdoors
- At home with family members
- In a store, when shopping
- **In a larger lecture hall (e.g., theater, concert hall, …)**
- At a movie theater

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

<table>
<thead>
<tr>
<th>Trend*</th>
<th>0%</th>
<th>2%</th>
<th>0%</th>
<th>6%</th>
<th>5%</th>
<th>6%</th>
<th>3%</th>
<th>1%</th>
<th>4%</th>
</tr>
</thead>
</table>

* % of satisfied HA owners compared to JapanTrak 2012
** question slightly changed: 2012=Understanding a lecture in a large public place

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

| Dispenser | Quality of service after purchase | 0.62 |
| Quality of dispensers counseling | 0.61 |
| Professionalism of dispenser | 0.61 |
| Quality of service during hearing aid fitting period | 0.58 |
| Sound quality signal process. | Natural sounding | 0.81 |
| Richness or fidelity of sound | 0.81 |
| Cleanness of tone and sound | 0.80 |
| Comfort with loud sounds | 0.75 |
| Product features | Reliability | 0.76 |
| Value (performance versus money spent) | 0.72 |
| Overall fit/Comfort | 0.72 |
| Managing whistling/feedback/buzzing | 0.67 |
| Visibility to others | 0.56 |
| Ease of changing battery | 0.43 |
| Battery life | 0.39 |

*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.*
Important listening situations

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

- When talking on a phone: 52%
- At home with family members: 48%
- In conversations with 1 person: 39%
- In conversations with small groups: 34%
- When watching TV with others: 28%
- In conversations with large groups: 25%
- In a store, when shopping: 19%
- In noisy situations: 19%
- When talking to children: 18%
- In the workplace: 17%
- When riding in a car: 13%
- In a larger lecture hall (e.g., theater, concert hall, place of worship, etc.): 11%
- When listening to music: 11%
- Outdoors: 6%
- During leisure activities (e.g., exercising, taking a walk, etc.): 6%
- In school or a classroom (as an observer or student): 5%
- At a movie theater: 4%

Hearing loss Total (n=1'306)
Hearing aid (n=416)
Hearing loss but no hearing aid (n=890)
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially “sense of safety”, “ability to communicate more effectively” and “feelings about yourself” improved

Since you started using your hearing aid(s), please rate the changes you have experienced in each of the following areas, that you believe are due to your hearing aid(s).
84% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
4. Analysis of hearing impaired non-owners
Reasons for not having hearing aids and why some people can consider hearing aids as uncomfortable
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

<table>
<thead>
<tr>
<th>Ears impaired</th>
<th>% HA Owner (n=405)</th>
<th>% HA-Non-owner Low 50% HL (n=368)</th>
<th>% HA-Non-owner Top 50% HL (n=208)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unilateral loss</td>
<td>17%</td>
<td>49%</td>
<td>25%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>83%</td>
<td>51%</td>
<td>75%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Perceived loss</th>
<th>% HA Owner (n=405)</th>
<th>% HA-Non-owner Low 50% HL (n=368)</th>
<th>% HA-Non-owner Top 50% HL (n=208)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mild</td>
<td>18%</td>
<td>55%</td>
<td>32%</td>
</tr>
<tr>
<td>Moderate</td>
<td>54%</td>
<td>43%</td>
<td>50%</td>
</tr>
<tr>
<td>Severe</td>
<td>23%</td>
<td>1%</td>
<td>17%</td>
</tr>
<tr>
<td>Profound</td>
<td>5%</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Top 10 reasons for not having a hearing aid (I/II)

- Uncomfortable
  - They do not restore your hearing to normal: 42% Reason, 26% Somewhat a reason, 31% Not a reason
  - Hearing loss not severe enough: 39% Reason, 20% Somewhat a reason, 40% Not a reason
  - They do not work well in noisy situations: 34% Reason, 25% Somewhat a reason, 42% Not a reason
  - Hear well enough in most situations: 26% Reason, 21% Somewhat a reason, 52% Not a reason
  - Have hearing loss only with low frequency sounds: 21% Reason, 26% Somewhat a reason, 52% Not a reason
  - Would be embarrassed to wear a hearing aid: 25% Reason, 19% Somewhat a reason, 56% Not a reason
  - Cannot afford a hearing aid: 29% Reason, 12% Somewhat a reason, 59% Not a reason
  - Have tinnitus (ringing in ears): 24% Reason, 13% Somewhat a reason, 63% Not a reason
  - Have hearing loss only with high pitch sounds: 18% Reason, 17% Somewhat a reason, 65% Not a reason

Base: non owners Top 50% HL: n=208
Less important reasons for not having a hearing aid (II/II)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Not a reason</th>
<th>Somewhat a reason</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bad design</td>
<td>65%</td>
<td>22%</td>
<td>12%</td>
</tr>
<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>67%</td>
<td>21%</td>
<td>13%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>67%</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>68%</td>
<td>12%</td>
<td>20%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>68%</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>70%</td>
<td>12%</td>
<td>18%</td>
</tr>
<tr>
<td>Ear doctors opinion (ENT)</td>
<td>70%</td>
<td>8%</td>
<td>21%</td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>71%</td>
<td>12%</td>
<td>18%</td>
</tr>
<tr>
<td>Do not trust Hearing Aid Dispenser/Audiologist</td>
<td>72%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>Another hearing aid owners opinion</td>
<td>73%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Family doctors opinion (GP)</td>
<td>75%</td>
<td>8%</td>
<td>18%</td>
</tr>
<tr>
<td>Have more serious priorities</td>
<td>76%</td>
<td>7%</td>
<td>17%</td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td>78%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>80%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>84%</td>
<td>5%</td>
<td>11%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>86%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Had surgery - hearing aids wont help</td>
<td>88%</td>
<td>5%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=208
### Top 10 reasons for HA owners NOT using them

<table>
<thead>
<tr>
<th>Reason</th>
<th>Reason</th>
<th>Somewhat a reason</th>
<th>Not a reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>They do not restore your hearing to normal</td>
<td>56%</td>
<td>37%</td>
<td>7%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>46%</td>
<td>36%</td>
<td>18%</td>
</tr>
<tr>
<td>They do not work well in noisy situations</td>
<td>37%</td>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>32%</td>
<td>22%</td>
<td>46%</td>
</tr>
<tr>
<td>Hearing loss not severe enough</td>
<td>19%</td>
<td>30%</td>
<td>50%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>32%</td>
<td>9%</td>
<td>58%</td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>10%</td>
<td>33%</td>
<td>58%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>23%</td>
<td>16%</td>
<td>62%</td>
</tr>
<tr>
<td>Hear well enough in most situations</td>
<td>0%</td>
<td>10%</td>
<td>90%</td>
</tr>
</tbody>
</table>

Owners who don't use, n=34
Meaning of «uncomfortable» (open question)

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

- not necessary yet in daily life: 18%
- foreign object in the ear, it pinches, it hurts, too big: 16%
- taking it on and off, adjusting: 12%
- uncomfortable noises, feedback, etc.: 9%
- uncomfortable in general: 9%
- others say it is uncomfortable: 5%
- expensive: 5%
- doesn't look nice, embarrassed to use, don't want to be...: 4%
- maintenance, cleaning: 3%
- afraid of losing it: 3%
- ineffective: 3%
- uncomfortable with glasses: 2%
- buzzing in my ears: 2%
- it is itching: 2%
- changing batteries: 1%
- vulnerable to sweat: 1%
- other: 10%
- none: 5%

Base: n=361
Social rejection because of hearing loss compared to the acceptance of hearing aids
91% of hearing aid owners think people don’t make fun of or reject them because of their hearing aids. It tends to be more likely that somebody makes fun or rejects a hearing impaired without hearing aids.

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

- 68% Never  
- 23% Rarely  
- 8% Occasionally  
- 1% Regularly

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

- 55% Never  
- 35% Rarely  
- 9% Occasionally  
- 0% Regularly

Base: N=416  
Base: Top 50% hearing loss, no hearing aid N=208
Buying intentions and most important triggers to buy
6% (2012:4%) of non-owners intend to get a hearing aid within the next year. Re-buying intention is higher than first-buying intention.
The most important influencing factors are worsening hearing loss, ENT and significant others (and: price for non owners)

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)?

- Hearing loss got worse: 62% (Owner), 63% (Non-Owner)
- ENT/ Ear Doctor: 34% (Owner), 36% (Non-Owner)
- GP /Family doctor: 12% (Owner), 21% (Non-Owner)
- Price of hearing aid: 7% (Owner), 21% (Non-Owner)
- Child: 16% (Owner), 16% (Non-Owner)
- Spouse: 16% (Owner), 15% (Non-Owner)
- Free due to coverage by Insurance / Received hearing aid free of charge: 5% (Owner), 14% (Non-Owner)
- Another hearing aid owner (word of mouth): 4% (Owner), 10% (Non-Owner)
- Financial Situation improved: 6% (Owner), 8% (Non-Owner)
- Safety concerns: 6% (Owner), 6% (Non-Owner)
- Friend / relative: 3% (Owner), 7% (Non-Owner)
- Hearing loss article or literature: 6% (Owner), 9% (Non-Owner)
- Hearing Aid Center: 4% (Owner), 16% (Non-Owner)

★ =Top 5 influences for owners in JapanTrak 2012
★★ =Top 5 influences for non owners in JapanTrak 2012

(some items were slightly changed in 2015 Japan Trak)
The most important influencing factors are worsening hearing loss, ENT and significant others (and: price for non owners)

**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)?

- Newspaper advertisement: 11% (Owner) vs. 2% (Non-owner)
- Internet: Websites of hearing aids manufacturers: 5% (Owner) vs. 3% (Non-owner)
- TV advertisement: 3% (Owner) vs. 4% (Non-owner)
- Internet: Websites of hearing aid clinics: 5% (Owner) vs. 3% (Non-owner)
- Newspaper flyer: 4% (Owner) vs. 3% (Non-owner)
- Optical Shop: 9% (Owner) vs. 1% (Non-owner)
- Information/advice about hearing loss from consumer organisation: 3% (Owner) vs. 2% (Non-owner)
- Co-worker or boss: 4% (Owner) vs. 1% (Non-owner)
- Direct mail piece: 2% (Owner) vs. 2% (Non-owner)
- Magazine advertisement: 1% (Owner) vs. 1% (Non-owner)
- Other Shop: 2% (Owner) vs. 1% (Non-owner)
- Celebrity or public personality: 1% (Owner) vs. 1% (Non-owner)
- Radio advertisement: 1% (Owner) vs. 1% (Non-owner)

Some items were slightly changed in 2015 Japan Trak.
The most important trigger to buy a hearing aid is worsening hearing loss

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

- Hearing loss got worse: 49%
- ENT/Ear Doctor: 13%
- Hearing aid dispenser/Audiologist: 5%
- Child: 4%
- Audiologist: 4%
- Friend/relative: 4%
- GP/Family doctor: 3%
- Financial Situation improved: 3%
- Radio advertisement: 3%
- TV advertisement: 2%
- Internet: Websites of hearing aid manufacturers: 2%
5. Additional JapanTrak questions
Half of the people with hearing loss are aware of any hearing aid shop in the area where they live (similar to 2012: 50%)

In the area where you live, are you aware of any hearing aid shop?

- Yes: 49%
- No: 46%
- Don’t know: 8%

Unweighted Sample Size = 1306
15% (2012:16%) of the hearing impaired know the expression “Nintei - Hocyouki - Ginou – Sha” (“certified hearing aid worker”)

Do you know, what the following expressions mean? Nintei - Hocyouki - Ginou - Sha

<table>
<thead>
<tr>
<th>Expression</th>
<th>Total</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>85%</td>
<td>11%</td>
<td>43%</td>
</tr>
<tr>
<td>No</td>
<td>15%</td>
<td></td>
<td>57%</td>
</tr>
</tbody>
</table>

Unweighted Sample Size = 1306
23% (2012: 24%) of the hearing impaired know the expression “Nintei - Hocyouki - Senmon - Ten” (“certified hearing aid shop”)

Do you know, what the following expressions mean? Nintei - Hocyouki - Senmon - Ten

Unweighted Sample Size = 1306
Only 4% (2012: 3%) of the hearing impaired know the expression “Techno-aid-kyoukai” (“association technical aids”)

Do you know, what the following expressions mean? Techno-aid-kyoukai

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>4%</td>
<td>96%</td>
</tr>
<tr>
<td><strong>Hearing loss but no hearing aid</strong></td>
<td>3%</td>
<td>97%</td>
</tr>
<tr>
<td><strong>Hearing aid owner</strong></td>
<td>11%</td>
<td>89%</td>
</tr>
</tbody>
</table>

Unweighted Sample Size = 1306
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 an interval +/-3.1 around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

<table>
<thead>
<tr>
<th>Sample size</th>
<th>Random sample error</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Real value is within interval:</td>
</tr>
<tr>
<td></td>
<td>Level of proportion: 50%/50%</td>
</tr>
<tr>
<td>50</td>
<td>+/- 13.9</td>
</tr>
<tr>
<td>100</td>
<td>+/- 9.8</td>
</tr>
<tr>
<td>250</td>
<td>+/- 6.2</td>
</tr>
<tr>
<td>500</td>
<td>+/- 4.4</td>
</tr>
<tr>
<td>1000</td>
<td>+/- 3.1</td>
</tr>
<tr>
<td>5’000</td>
<td>+/- 1.4</td>
</tr>
<tr>
<td>10’000</td>
<td>+/- 1.0</td>
</tr>
</tbody>
</table>
### Demographics (1): Hearing instrument adoption rates and populations

Profiles: Categories add to 100%*

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>6946</td>
<td>10.9%</td>
<td>13.8%</td>
<td>48.7%</td>
<td>46.8%</td>
<td>48.1%</td>
</tr>
<tr>
<td>Female</td>
<td>7370</td>
<td>11.6%</td>
<td>13.2%</td>
<td>51.3%</td>
<td>53.2%</td>
<td>51.9%</td>
</tr>
<tr>
<td><strong>Age recoded</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>1876</td>
<td>1.5%</td>
<td>46.8%</td>
<td>14.5%</td>
<td>1.1%</td>
<td>6.1%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1386</td>
<td>2.9%</td>
<td>23.1%</td>
<td>10.6%</td>
<td>2.2%</td>
<td>4.3%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1581</td>
<td>2.5%</td>
<td>15.4%</td>
<td>12.1%</td>
<td>2.4%</td>
<td>2.8%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>2004</td>
<td>3.4%</td>
<td>7.3%</td>
<td>15.2%</td>
<td>4.5%</td>
<td>2.3%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>1836</td>
<td>7.2%</td>
<td>3.0%</td>
<td>13.4%</td>
<td>9.2%</td>
<td>1.8%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1826</td>
<td>10.3%</td>
<td>6.4%</td>
<td>12.9%</td>
<td>12.6%</td>
<td>5.6%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1961</td>
<td>18.0%</td>
<td>9.2%</td>
<td>12.7%</td>
<td>22.9%</td>
<td>14.9%</td>
</tr>
<tr>
<td>74+</td>
<td>1846</td>
<td>41.6%</td>
<td>17.6%</td>
<td>8.5%</td>
<td>45.2%</td>
<td>62.2%</td>
</tr>
<tr>
<td><strong>Type of household</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>single household</td>
<td>1093</td>
<td>18.1%</td>
<td>12.3%</td>
<td>7.1%</td>
<td>12.4%</td>
<td>11.2%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>2807</td>
<td>15.6%</td>
<td>11.7%</td>
<td>18.7%</td>
<td>27.6%</td>
<td>23.6%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>6518</td>
<td>5.7%</td>
<td>9.1%</td>
<td>48.4%</td>
<td>24.1%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>2221</td>
<td>13.8%</td>
<td>21.8%</td>
<td>15.1%</td>
<td>17.1%</td>
<td>30.5%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>182</td>
<td>45.4%</td>
<td>14.4%</td>
<td>0.8%</td>
<td>5.0%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Other</td>
<td>1495</td>
<td>14.9%</td>
<td>13.5%</td>
<td>10.0%</td>
<td>13.8%</td>
<td>13.8%</td>
</tr>
</tbody>
</table>

* Small sample sizes in some categories
## Demographics (2) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%*

<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The head of the household</strong></td>
<td>5218</td>
<td>16.3%</td>
<td>12.7%</td>
<td>34.6%</td>
<td>56.0%</td>
<td>52.6%</td>
</tr>
<tr>
<td><strong>The spouse of the head of the household</strong></td>
<td>3499</td>
<td>10.0%</td>
<td>12.4%</td>
<td>25.0%</td>
<td>23.0%</td>
<td>21.0%</td>
</tr>
<tr>
<td><strong>Daughter/son of head of household</strong></td>
<td>4385</td>
<td>1.8%</td>
<td>11.3%</td>
<td>34.2%</td>
<td>5.2%</td>
<td>4.3%</td>
</tr>
<tr>
<td><strong>Parent of the head of the household</strong></td>
<td>611</td>
<td>35.0%</td>
<td>18.3%</td>
<td>3.2%</td>
<td>13.2%</td>
<td>19.0%</td>
</tr>
<tr>
<td><strong>Other person</strong></td>
<td>423</td>
<td>9.8%</td>
<td>15.7%</td>
<td>3.0%</td>
<td>2.6%</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full time employed</strong></td>
<td>4578</td>
<td>6.3%</td>
<td>8.9%</td>
<td>39.8%</td>
<td>19.1%</td>
<td>12.7%</td>
</tr>
<tr>
<td><strong>Part time employed</strong></td>
<td>1789</td>
<td>7.3%</td>
<td>4.7%</td>
<td>15.4%</td>
<td>9.1%</td>
<td>3.0%</td>
</tr>
<tr>
<td><strong>Unemployed / not working</strong></td>
<td>2560</td>
<td>14.5%</td>
<td>16.1%</td>
<td>20.3%</td>
<td>22.5%</td>
<td>29.4%</td>
</tr>
<tr>
<td><strong>Retired under a disability pension scheme (fully or partly)</strong></td>
<td>2051</td>
<td>30.9%</td>
<td>14.3%</td>
<td>13.2%</td>
<td>39.2%</td>
<td>44.7%</td>
</tr>
<tr>
<td><strong>Early retired under an early retirement benefit scheme</strong></td>
<td>74</td>
<td>19.2%</td>
<td>17.1%</td>
<td>0.6%</td>
<td>0.9%</td>
<td>1.2%</td>
</tr>
<tr>
<td><strong>Retired (at the official retirement age)</strong></td>
<td>500</td>
<td>25.3%</td>
<td>11.9%</td>
<td>3.5%</td>
<td>8.1%</td>
<td>7.4%</td>
</tr>
<tr>
<td><strong>Student / pupil / in training</strong></td>
<td>803</td>
<td>2.6%</td>
<td>15.1%</td>
<td>7.3%</td>
<td>1.3%</td>
<td>1.6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>a middle school</strong></td>
<td>1013</td>
<td>26.4%</td>
<td>15.8%</td>
<td>6.9%</td>
<td>16.3%</td>
<td>20.8%</td>
</tr>
<tr>
<td><strong>a high school</strong></td>
<td>4220</td>
<td>13.6%</td>
<td>10.5%</td>
<td>33.9%</td>
<td>37.1%</td>
<td>29.8%</td>
</tr>
<tr>
<td><strong>a vocational (technical) school</strong></td>
<td>1080</td>
<td>9.2%</td>
<td>11.7%</td>
<td>9.1%</td>
<td>6.3%</td>
<td>5.7%</td>
</tr>
<tr>
<td><strong>a junior college</strong></td>
<td>1001</td>
<td>9.3%</td>
<td>7.2%</td>
<td>8.4%</td>
<td>6.3%</td>
<td>3.3%</td>
</tr>
<tr>
<td><strong>a university</strong></td>
<td>3557</td>
<td>9.0%</td>
<td>14.2%</td>
<td>30.1%</td>
<td>19.9%</td>
<td>22.5%</td>
</tr>
<tr>
<td><strong>a graduate school</strong></td>
<td>336</td>
<td>6.3%</td>
<td>4.4%</td>
<td>2.9%</td>
<td>1.5%</td>
<td>0.5%</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td>342</td>
<td>27.2%</td>
<td>19.0%</td>
<td>2.3%</td>
<td>5.4%</td>
<td>8.7%</td>
</tr>
<tr>
<td><strong>Prefer not to say</strong></td>
<td>805</td>
<td>14.6%</td>
<td>15.3%</td>
<td>6.4%</td>
<td>7.2%</td>
<td>8.8%</td>
</tr>
</tbody>
</table>

* Small sample sizes in some categories