

Results

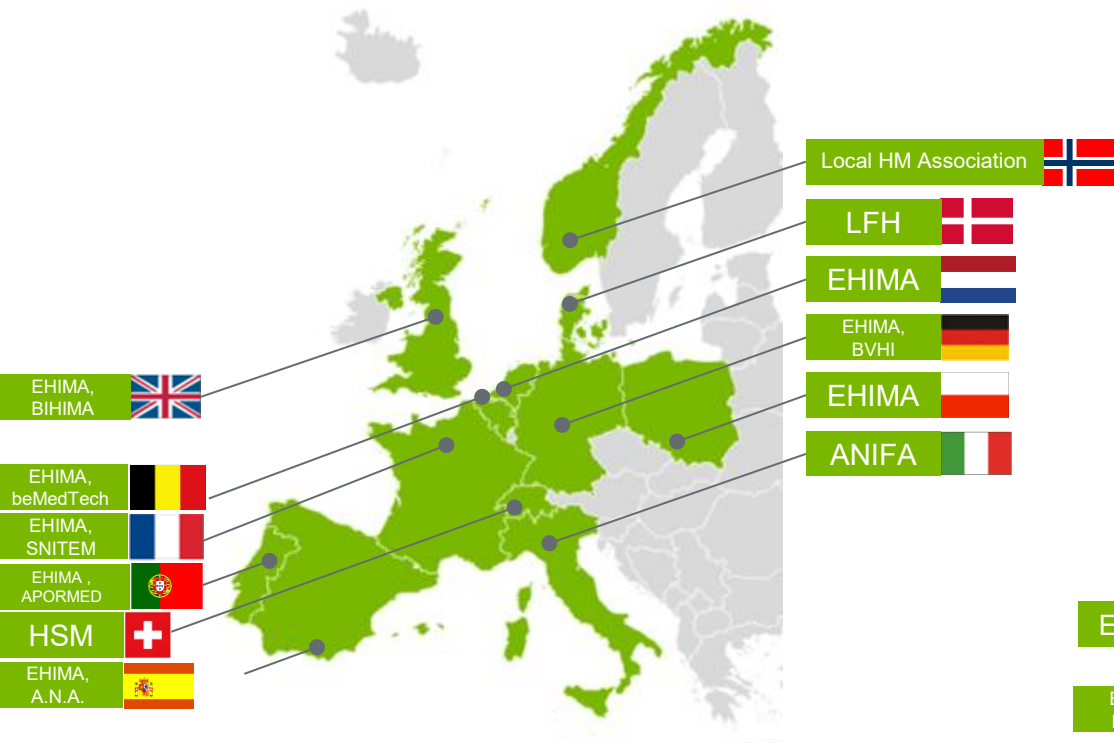
JapanTrak 2025

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

Summary

1. Introduction

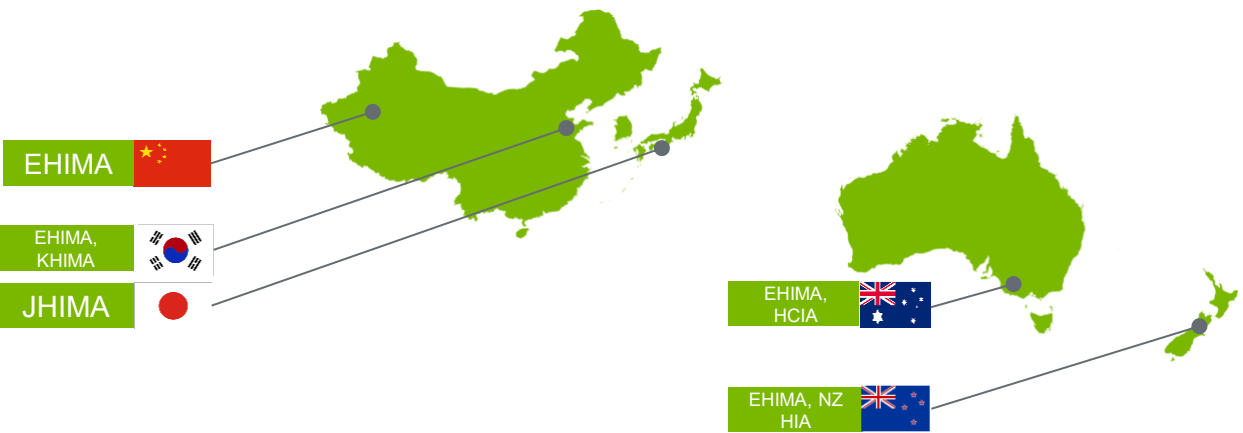
JapanTrak 2025 is part of the EuroTrak / APACTrak studies:



JapanTrak 2025 was designed and executed by Anovum (Zurich) on behalf of JHIMA .

Sample sizes:

Representative sample (sample 1):	n=14'368 people
Hearing impaired (sample 2):	n=1'380 people
Hearing impaired non-owners (HA Non-owner):	n=932 people
Hearing aid owner (HA Owner):	n=448 people





Summary Japan-specific questions

- Knowledge of hearing-related services and institutions is limited but gradually improving.
 - Awareness of hearing aid shops and terms like “Certified Hearing Aid Specialist Store” or “Certified Hearing Aid Technician” is slightly increasing, 44% know their hearing aids were fitted by a certified technician.
 - Only 13% (44% of owners) know that hearing aids are VAT-exempt, and few are aware of the Techno-Aids Association
- Only 38% (2022: 32%) of the interviewed self-stated hearing-impaired talked to an ENT about their hearing loss, and most were told that **no action** was needed.
 - **Main reasons for visiting** an ENT: Hearing difficulties and family recommendation.
 - **Main reasons for not visiting** an ENT: Hearing loss not perceived as troublesome and considered an inevitable part of aging.
- Use of PSAP and OTC devices alongside hearing aids:
 - 19% of hearing aid owners report having a PSAP, mainly for convenience and adequacy
 - PSAP/OTC devices are mostly bought online and are much cheaper than medical hearing aids, which are typically purchased at hearing aid centers and usually cost between 100,000 and 300,000 yen
- Since 2018, hearing aid adoption has risen slightly but steadily, accompanied by higher satisfaction. While satisfaction remains below other countries, it is clearly higher among users of medical devices fitted by certified technicians and bought at hearing aid centers.
- People with one hearing aid tend to believe it works as well as two, although data tend to show the opposite.



Summary

2. Market overview

- **Stated hearing loss prevalence**
 - Total: 11%, 18+: 12.6%.
 - Hearing Tests: 50% had a hearing test in the past five years – mainly at the workplace.
- **Hearing aid adoption rate (HA penetration)**
 - 15.6% of those with self-declared HL.
 - 1.7% of total population.
 - 50% of HA owners have binaural treatment.
- **The route to the hearing aid**
 - 43% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
 - 16% got hearing aids recommended from the ENT or family doctor (drop out rate=64%).
 - 15% of the GP consultations referred to an ENT, 15% to an Audiologist, and 23% to get hearing aids. 56% recommended no action.
 - 20% of ENT consultations were referred to an Audiologist, 24% recommended getting a hearing aid, and 64% 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.
 - 2/3 of employed individuals using hearing aids believe the devices enable them to work longer.
 - Hearing aid owners have a lower risk of being depressed.
 - Hearing aid owners are less exhausted in the evening.
 - Quality of sleep seems to improve if the hearing impaired use hearing aids.

Summary

3. Analysis of hearing aid owners

- **Hearing aid ownership, usage, and accessories**
 - 13% received some kind of reimbursement from the government.
 - 59% of the currently owned HAs were acquired in 2022 or later.
 - The median age of hearing aids before replacement is five years.
 - On average, HAs are worn 7.3 hours a day.
 - RICs are the most often purchased type of HA.
 - 22% of HA owners use a hearing aid app, and 72% are satisfied with it.
- **Importance of listening situations and satisfaction with HAs**
 - 68% of the hearing aid owners say their hearing aid works better than or as expected.
 - 54% of the HA owners are satisfied with their hearing aids.
 - The more hours worn per day, the higher the satisfaction with the HA.
 - The most important listening situations are talking on the phone and communicating with family members.
- **Positive impact of HAs**
 - People with hearing aids report significant positive effects – especially on their sense of safety, ability to communicate more effectively, and how they feel about themselves.
 - 71% of hearing aid owners feel more confident moving in a city since wearing hearing aids.
 - 95% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
 - 56% of all HA owners think they should have gotten their HAs sooner.



Summary

4. Analysis of hearing impaired non-owners

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

- 10% of non-owners know the system of supplying hearing aid(s) by the government.
- Perceived discomfort and limited benefit deter hearing aid use.
- 11% who own hearing aids don't use them (0 hours); 21% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**

- 77% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid.
- The most important reasons for buying a hearing aid are worsening hearing loss and the advice of ENTs.



Detailed Results: Roadmap

1. Introduction

- Organisation of JapanTrak 2025
- Recruitment process: In search of hearing impaired people

2. Market overview

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

3. Analysis of hearing aid owners

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

4. Analysis of hearing impaired non-owners

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

5. Appendix

- Demographics: Hearing instrument adoption rates and populations



1. Introduction





Organisation of JapanTrak 2025

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: CORTITON, GN Hearing Japan, Oticon Japan, NJH (New Japan Hearing), PANASONIC, Phonak, RION, Sivantos K.K, Starkey, Widex, makichie.
- Anovum Zurich developed the concept of JapanTrak, designed the questionnaire, and conducted the fieldwork in cooperation with a panel company. Furthermore, Anovum analyzed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire.
- Anovum and JHIMA adapted the EuroTrak questionnaire for JapanTrak. JHIMA translated the questionnaire into Japanese.

Use of the data

- The principal may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.
- The raw dataset remains at Anovum. If the principal uses the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
“Source: Anovum – JapanTrak/2025/n=[relevant sample size]”
- Member companies of the principal can ask Anovum to further analyse the raw data in specific ways at their own expense.





Recruitment process: In search of hearing impaired people

Step 1: Screening interviews

Objective: Prevalence of hearing loss and hearing aid ownership

Process:

1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)
2. Contacts from large panellist pools
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=14'368** 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= 932** hearing impaired non-owners and **n=448** hearing aid owners





2. Market overview

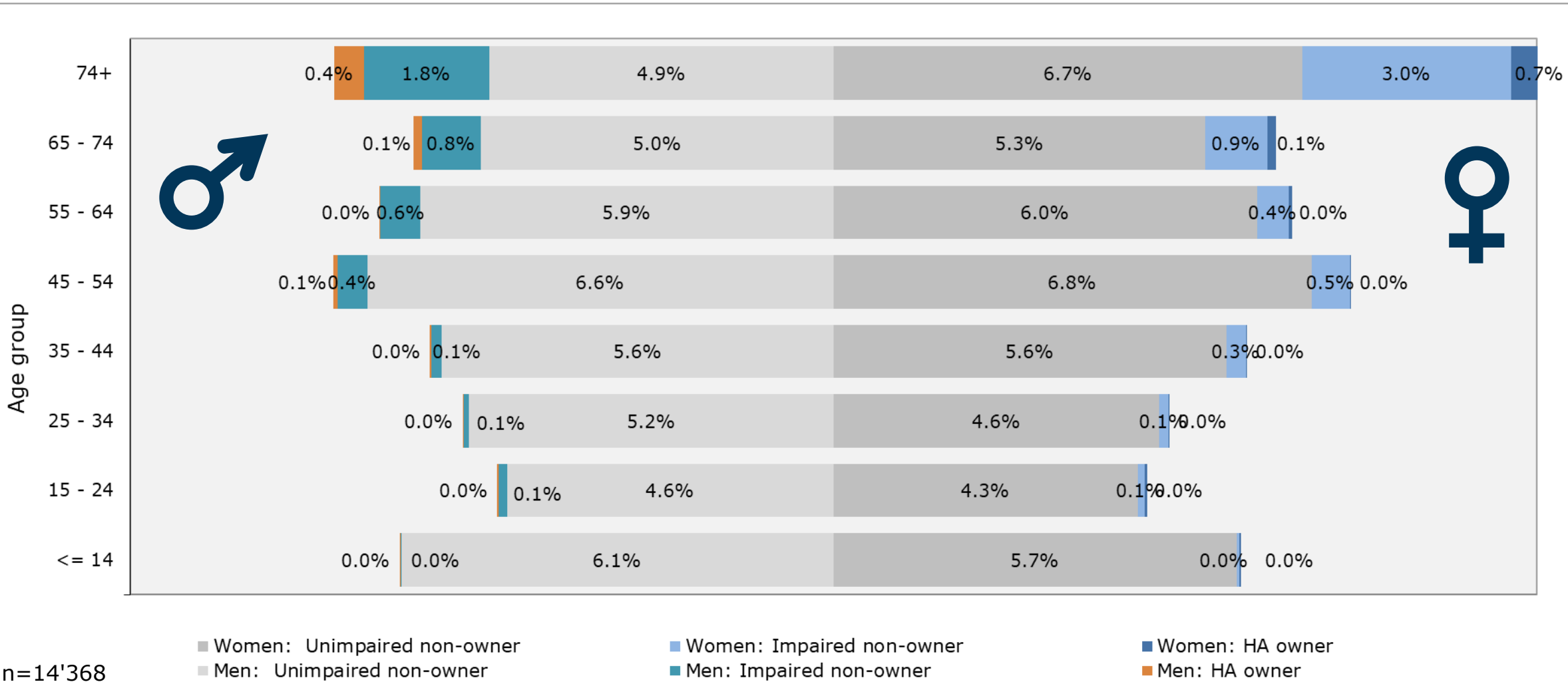




Prevalence of hearing loss and adoption rate



Hearing loss and hearing instrument ownership by gender/age

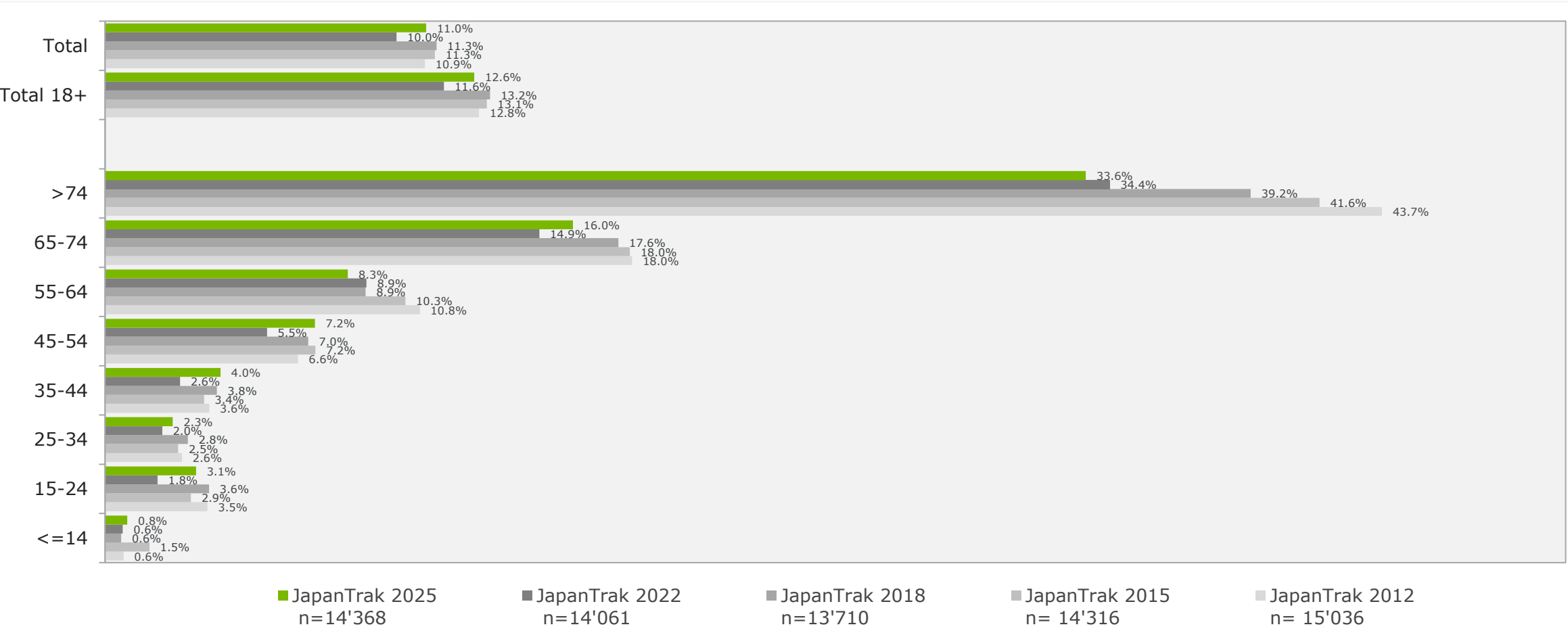




Hearing loss prevalence Japan

Self-declared hearing loss

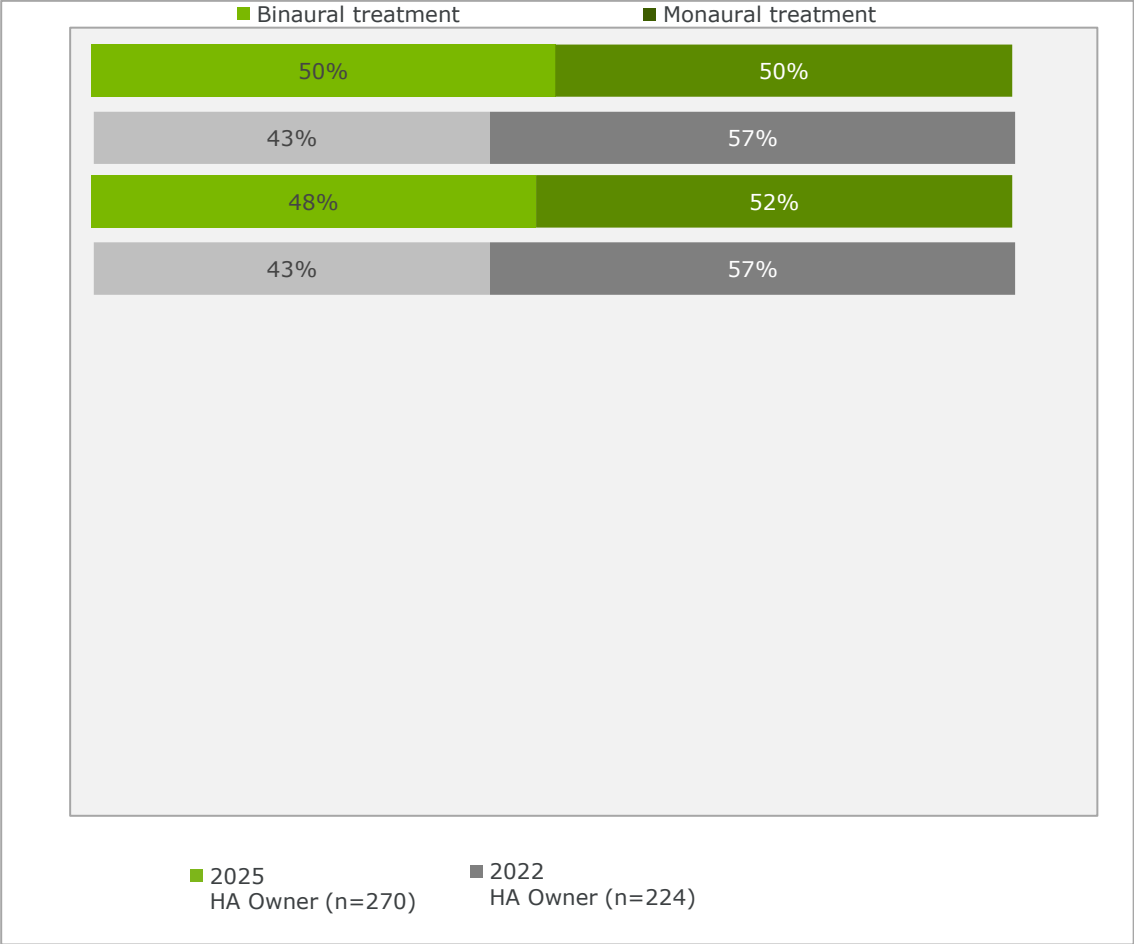
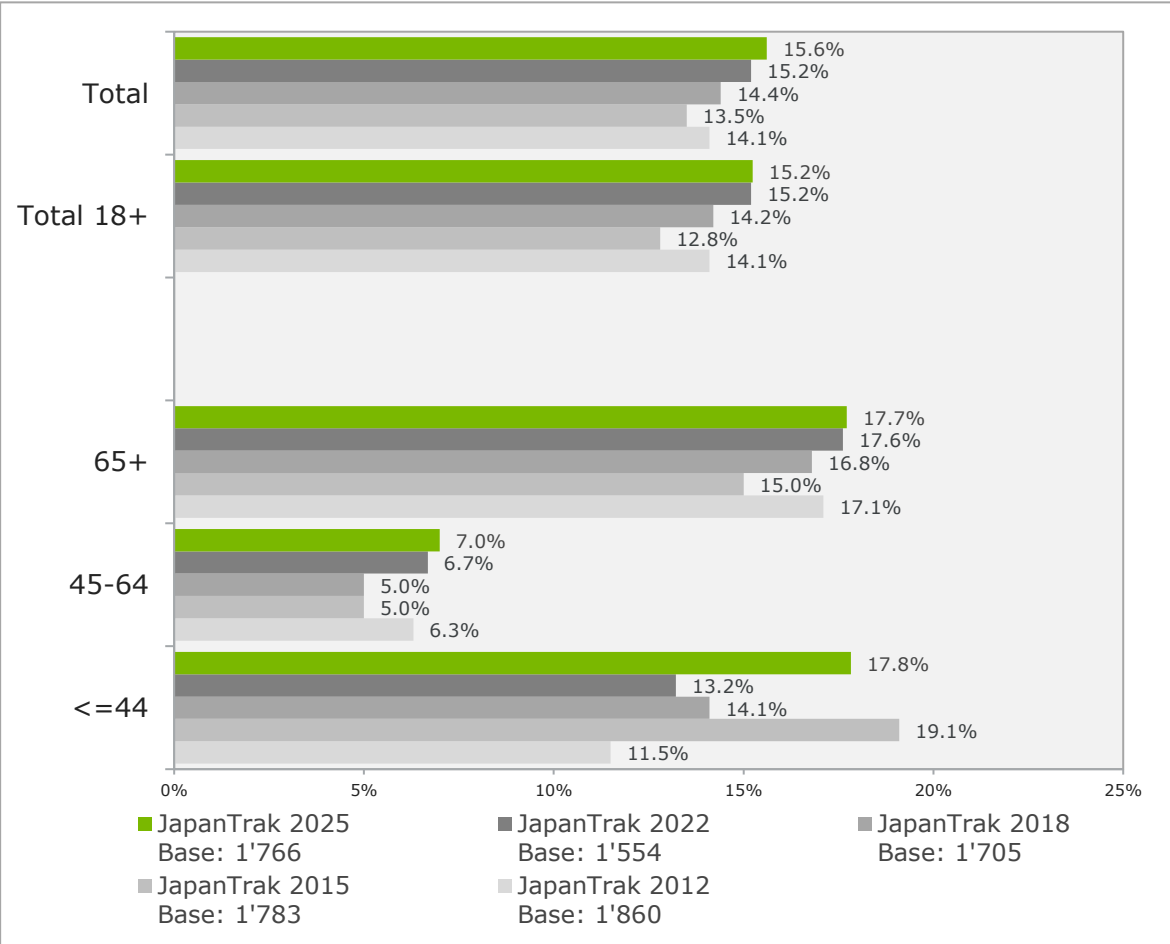
% hearing loss prevalence





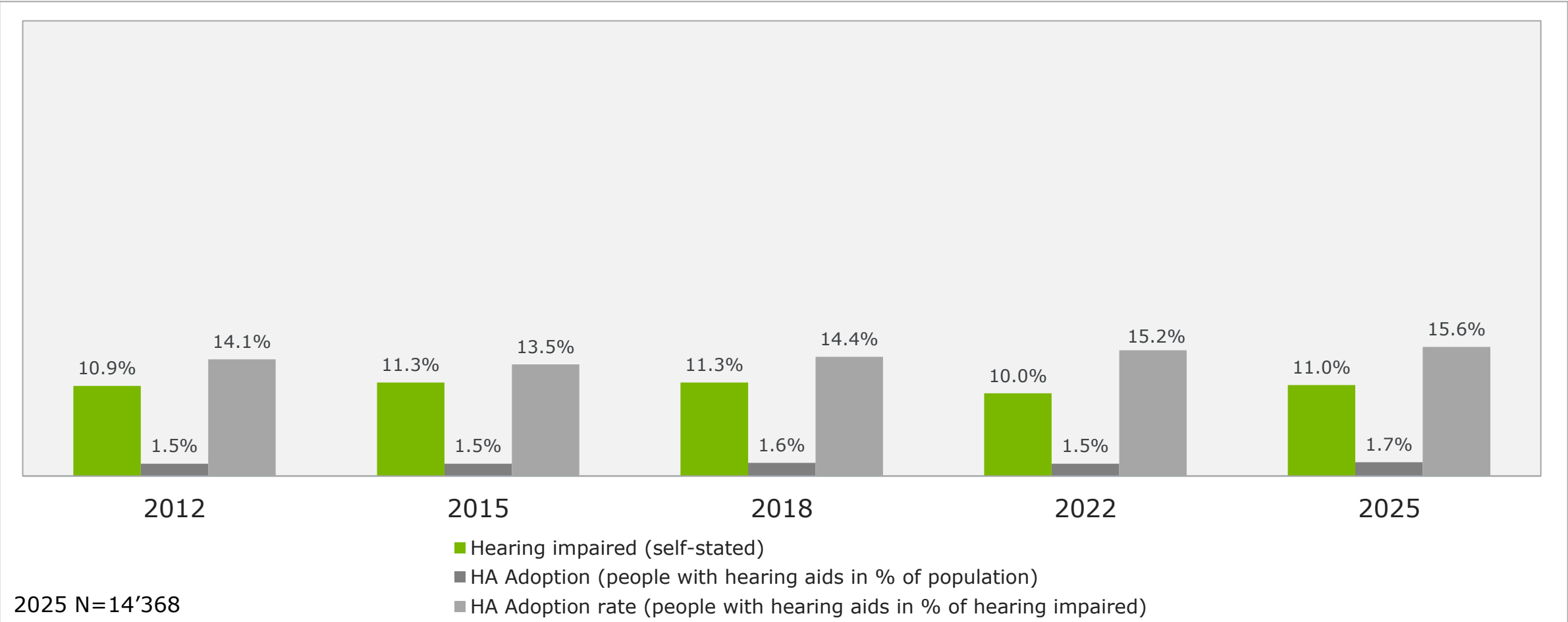
Hearing aid adoption rate: 15.6% of the hearing impaired have hearing aid(s), and 50% of them have binaural treatment

% of hearing impaired



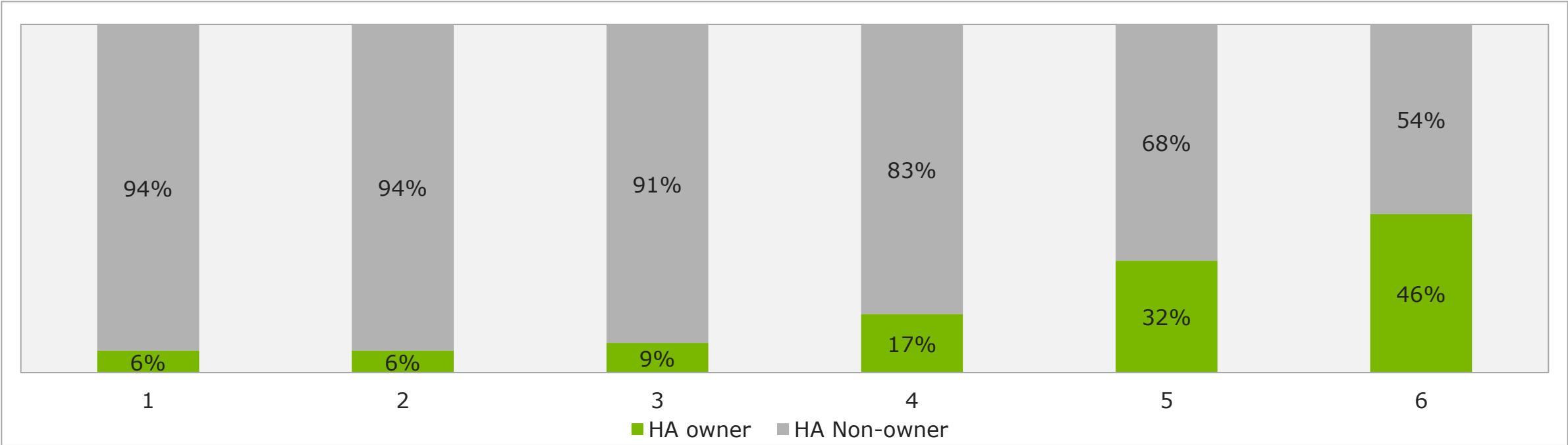


Overview of hearing loss prevalence and hearing aid adoption





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



Hearing loss sixtile-groups

* 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).

HA Non-owner n=932
HA Owner n=448



Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	HA Non-owner n=932	HA Owner n=448	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	34%	24%	13%
Bilateral loss	66%	76%	20%
Perceived loss			
Mild	49%	31%	11%
Moderate	47%	55%	18%
Severe	2%	11%	44%*
Profound	1%	3%	

* combined “severe” and “profound” because n is too small

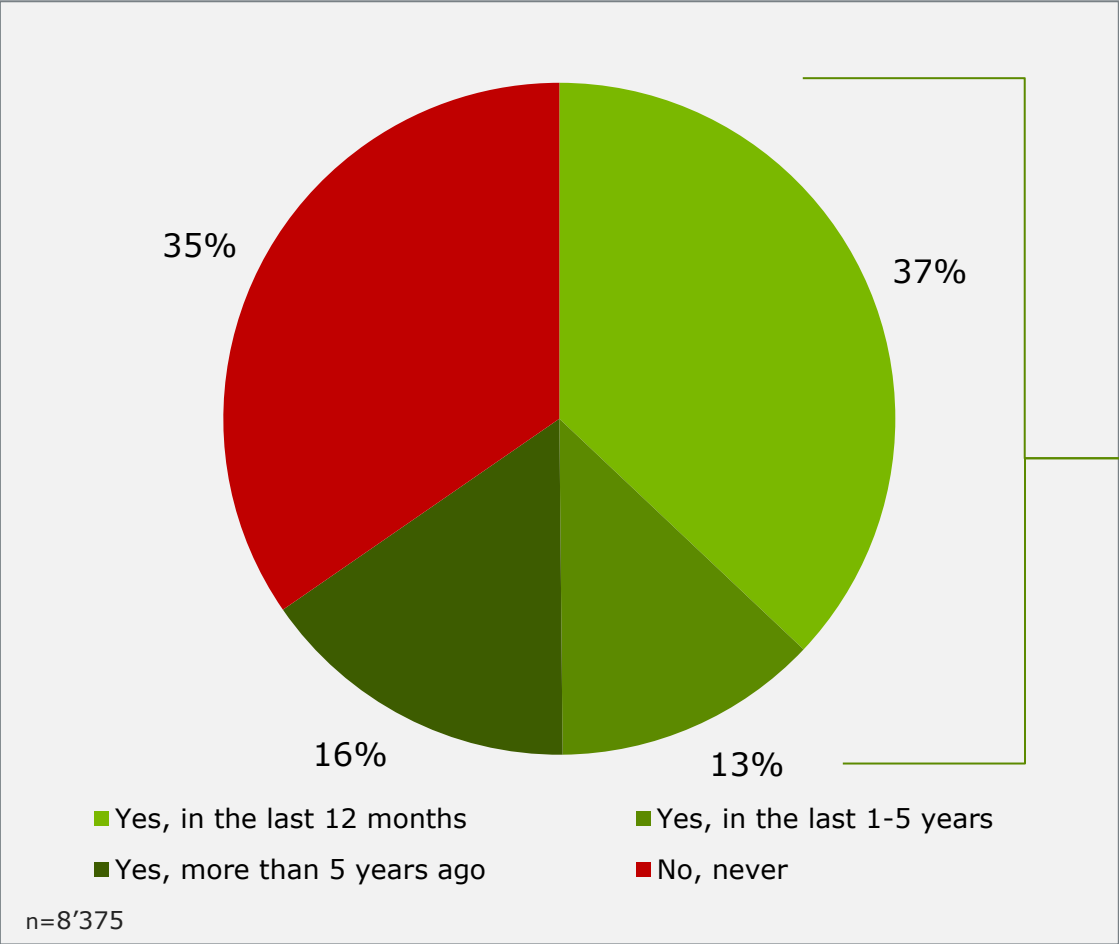


Hearing tests and where hearing is tested

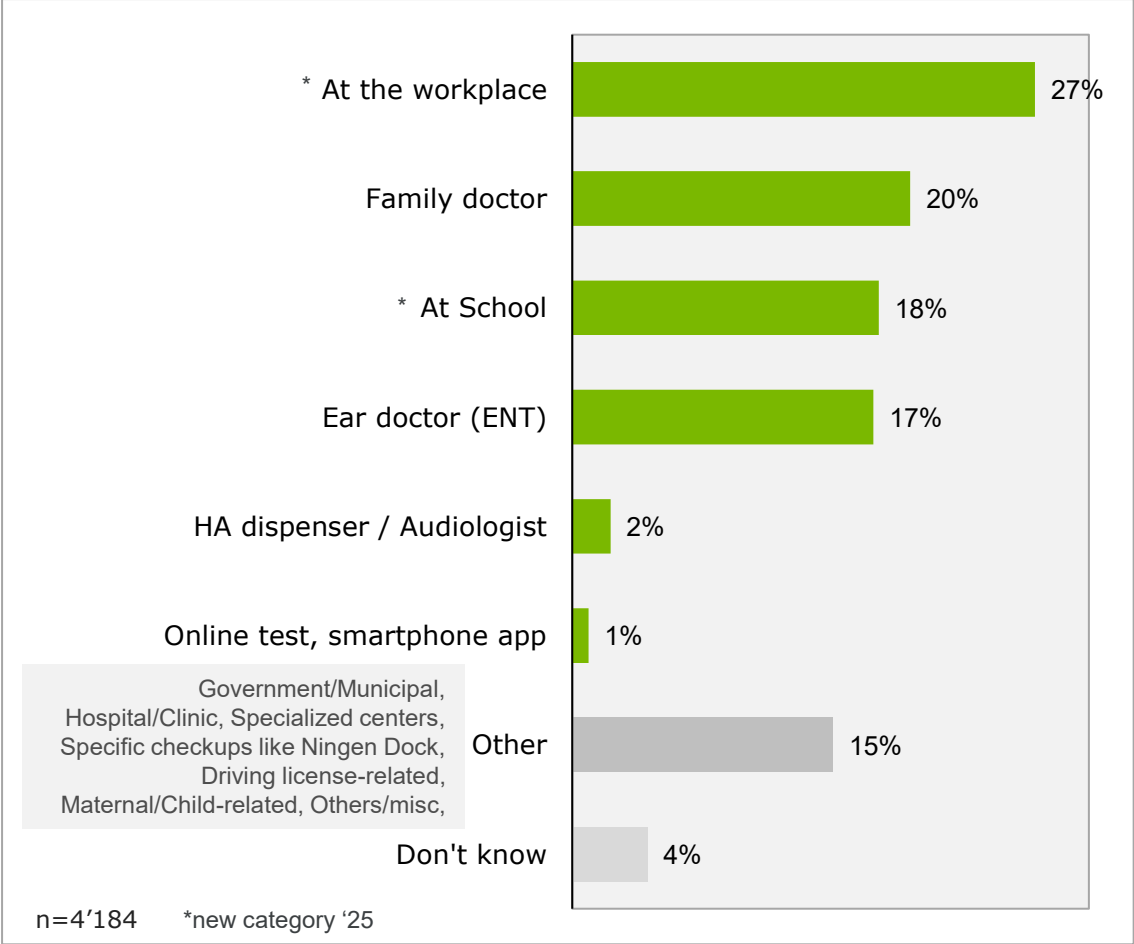


50% of individuals had a hearing test in the last five years, with most tests conducted at their workplace, school, or by their family/ENT doctor

Have you ever taken a hearing test?



Where/how was your hearing tested?



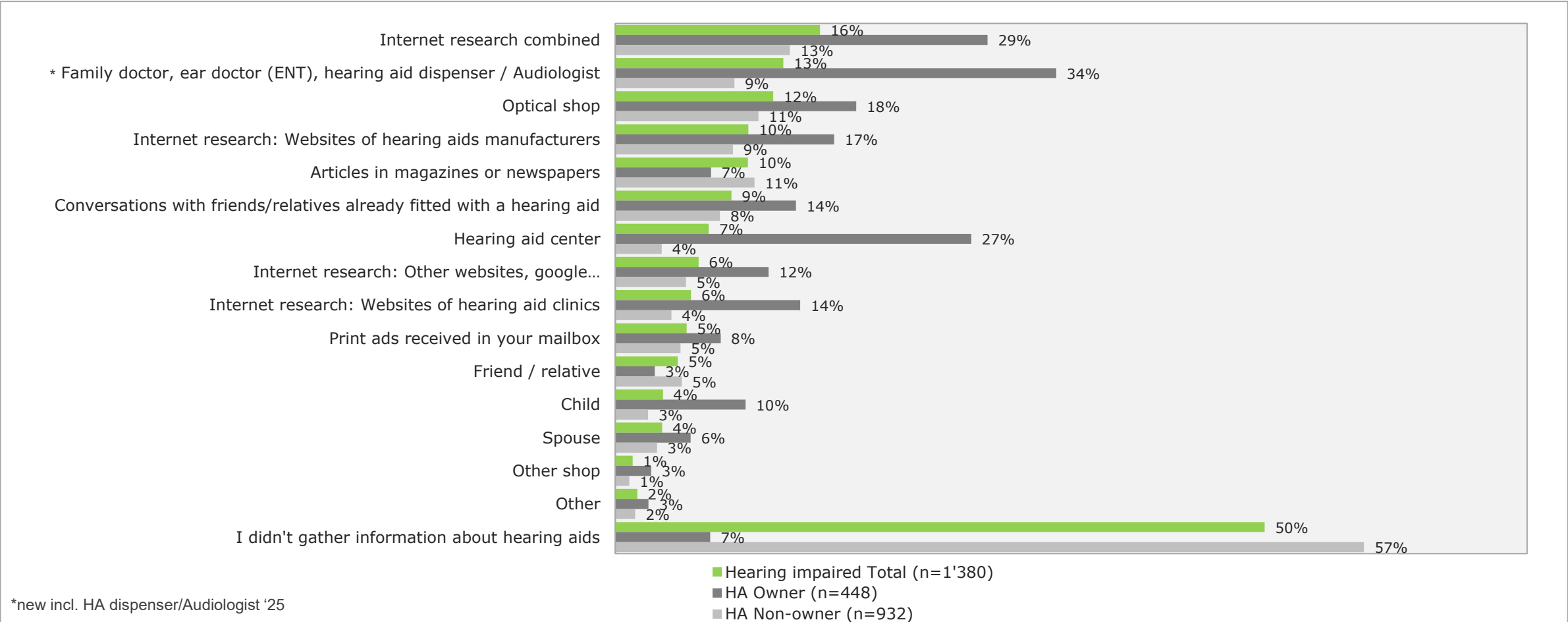


The route to the hearing aid: Sources of information and drop-out rates



Internet is the main information source on hearing aids, followed by doctors (GPs/ENTs) and audiologists – many without hearing aids, however, did not gather any information

Where did you gather information about hearing aids?

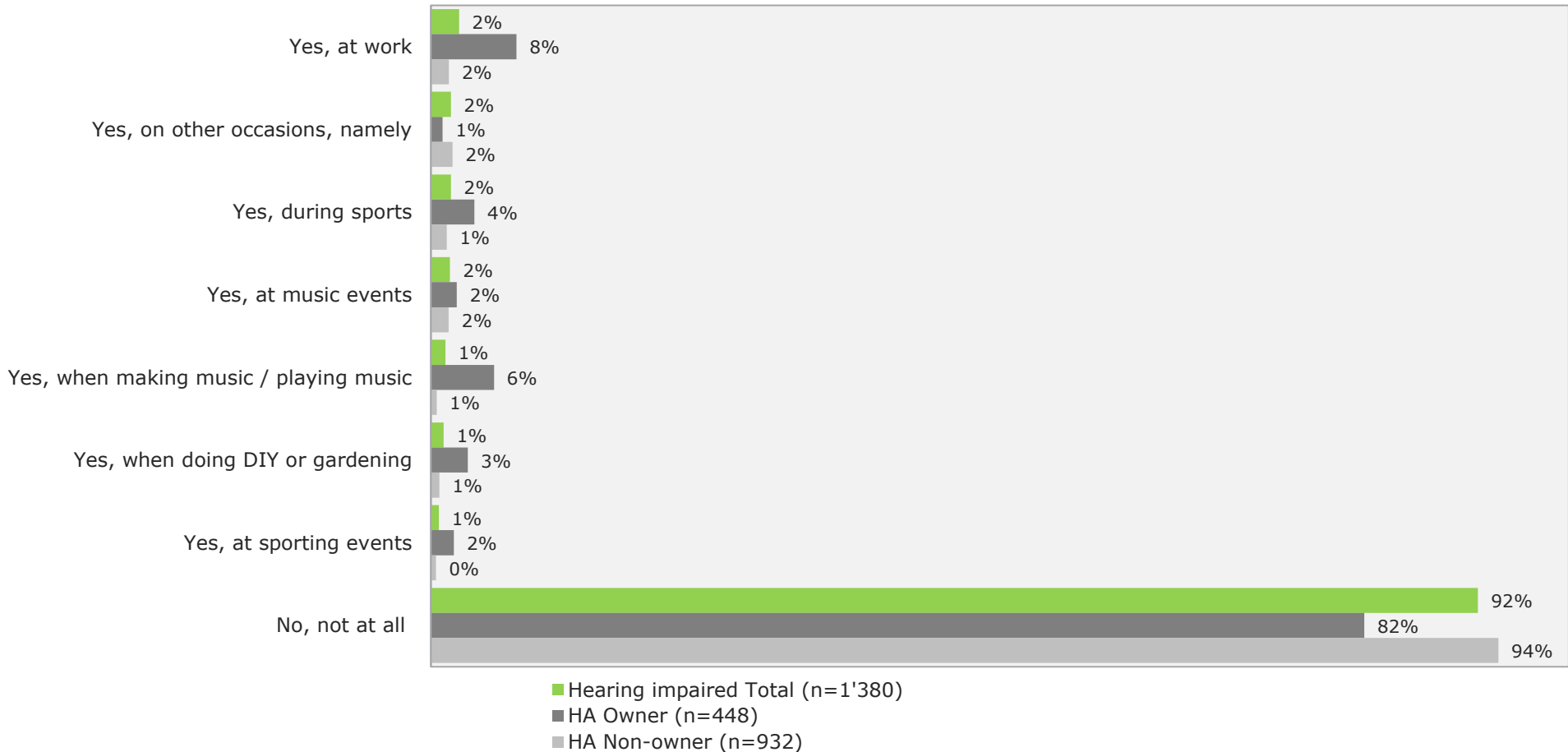


*new incl. HA dispenser/Audiologist '25



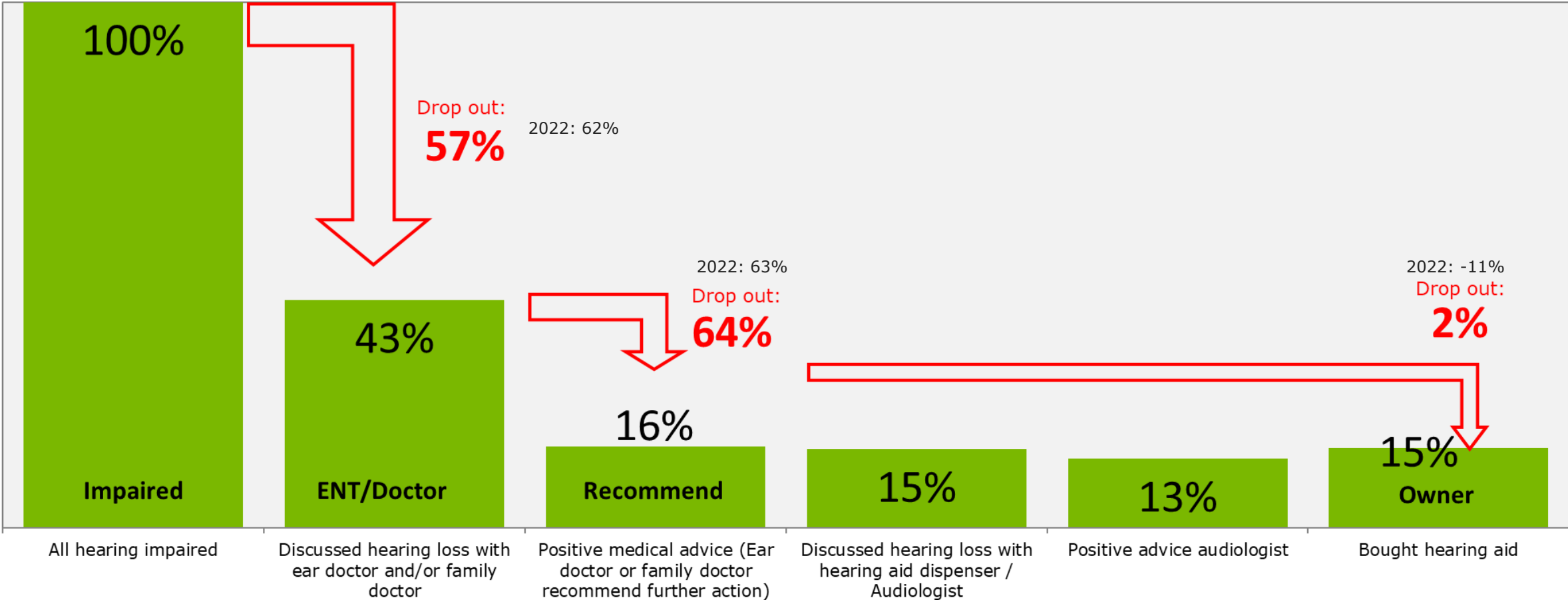
Usage of hearing protection by hearing impaired

Do you use hearing protection at least occasionally?





The route to the hearing aid

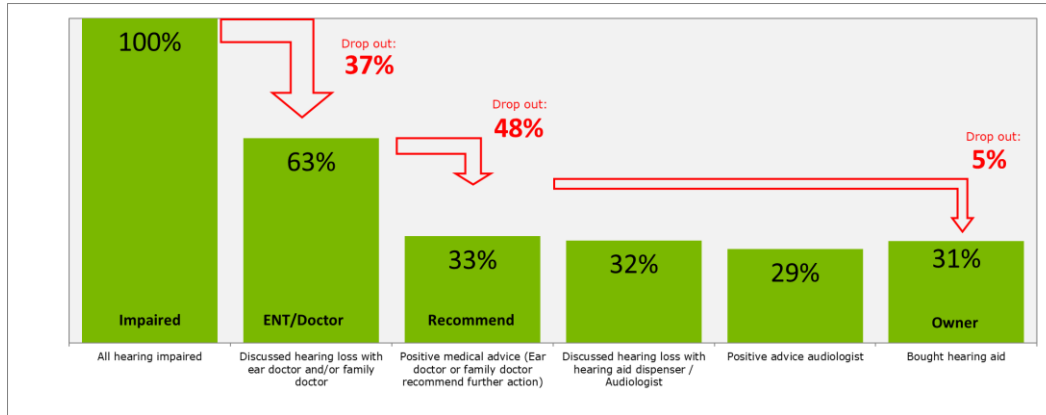


n=1'380

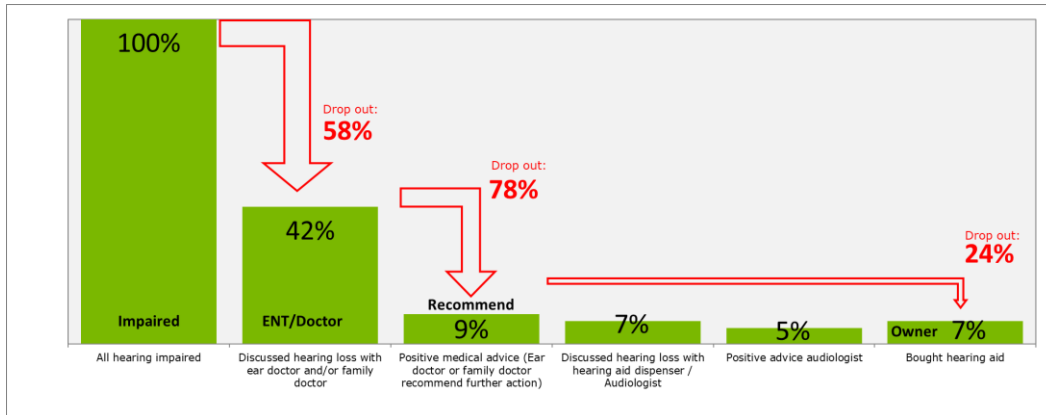
Hearing aid dispenser was asked in general without any further specification

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

Top 50% hearing loss*



Low 50% hearing loss*



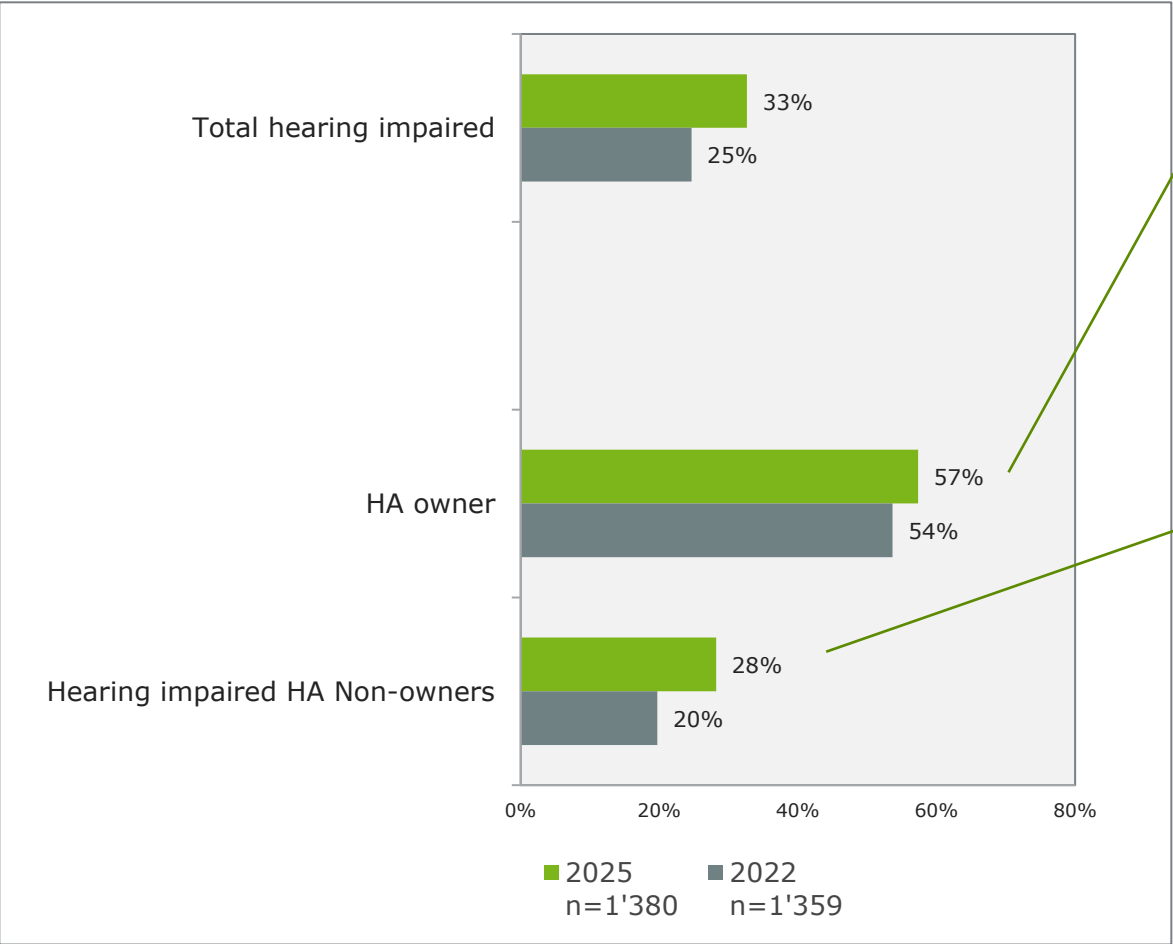
* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- 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

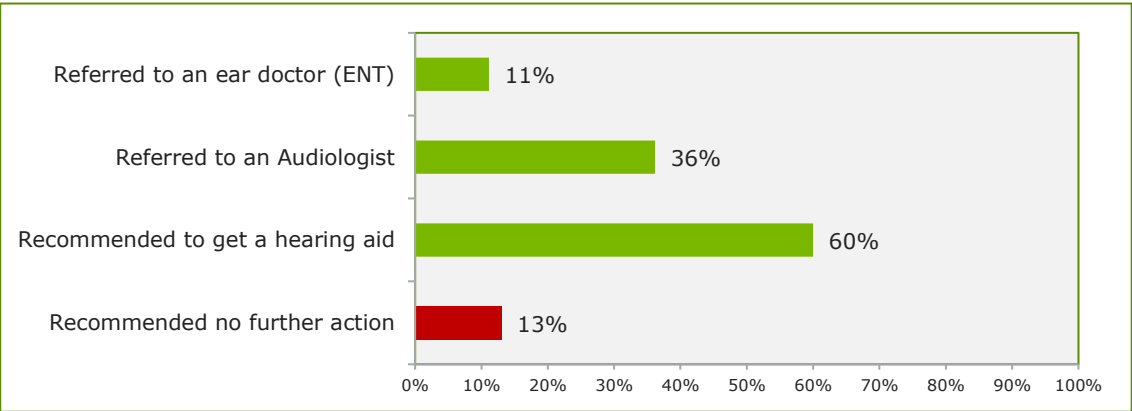
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

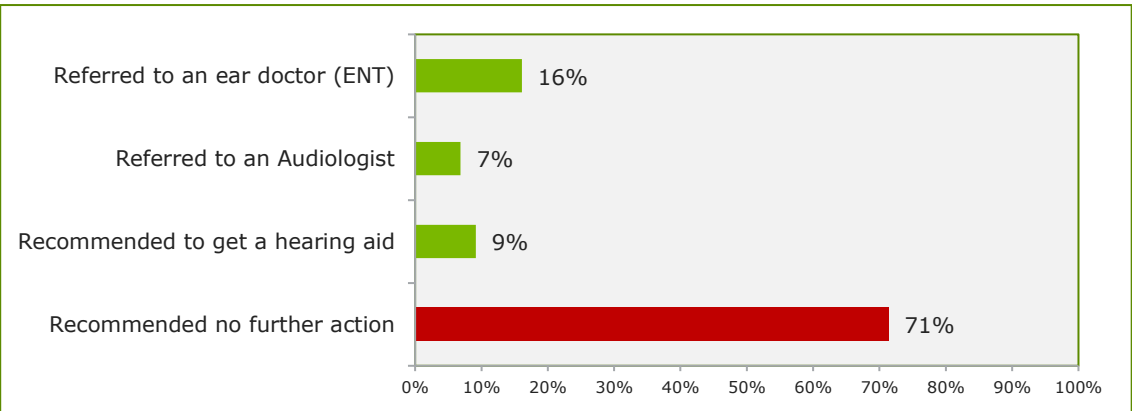


What did he/she recommend?

HA Owner (n=252)



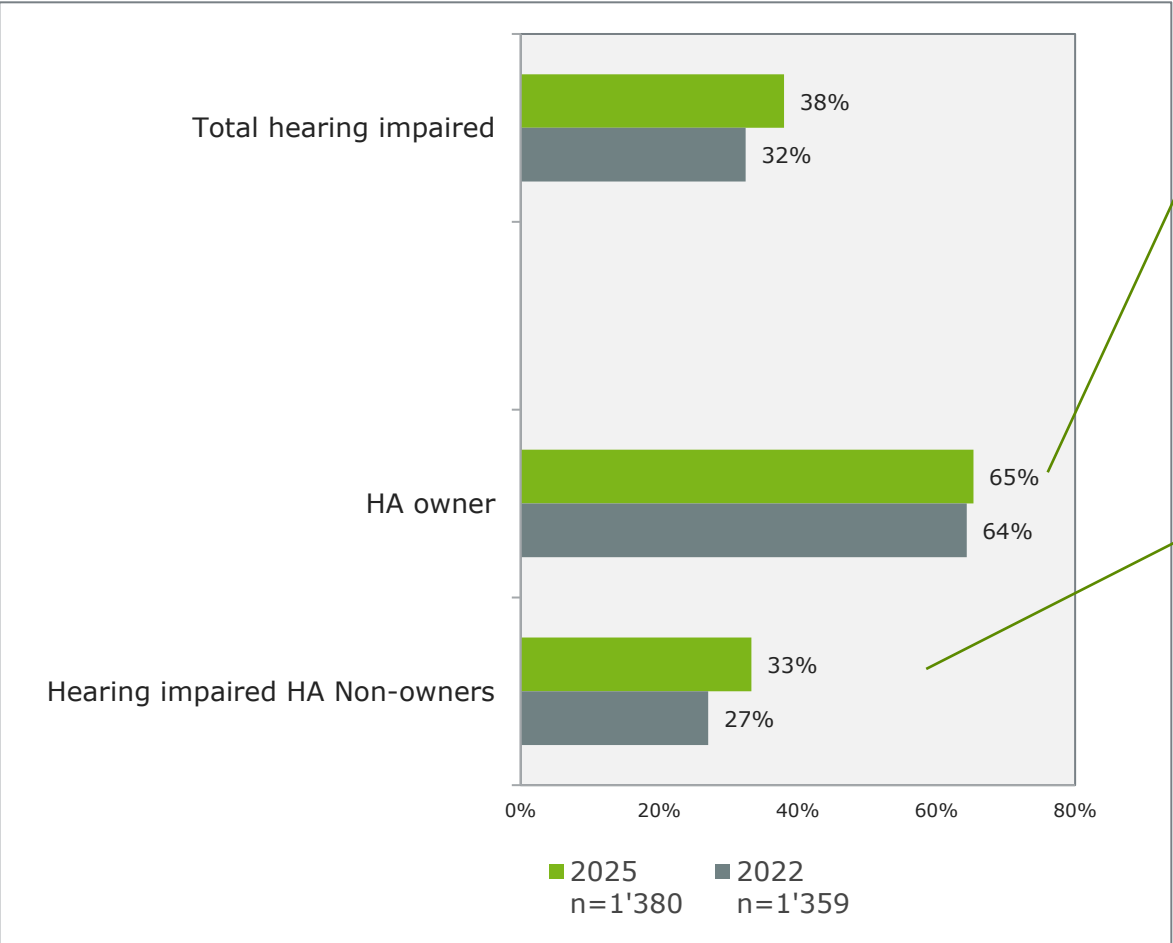
Impaired HA Non-owner (n=242)



The route to the hearing aid: ENT

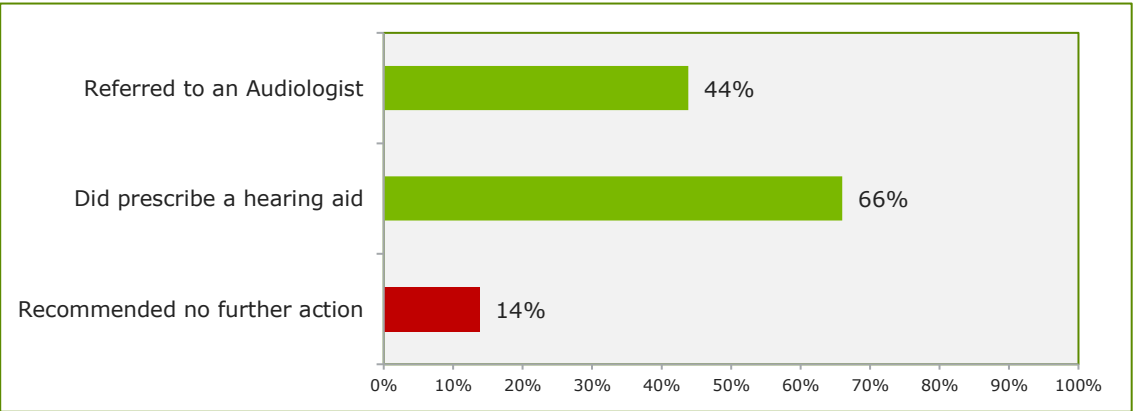
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

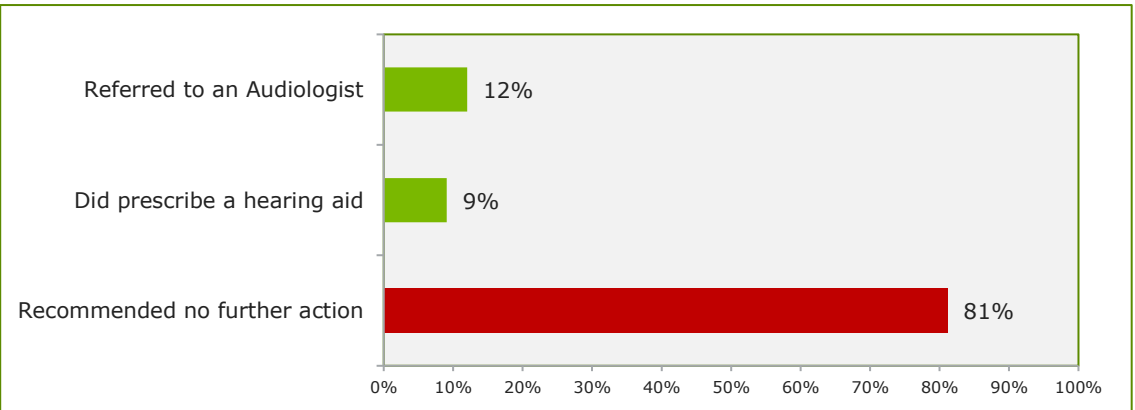


What did he/she recommend ?

HA Owner (n=285)

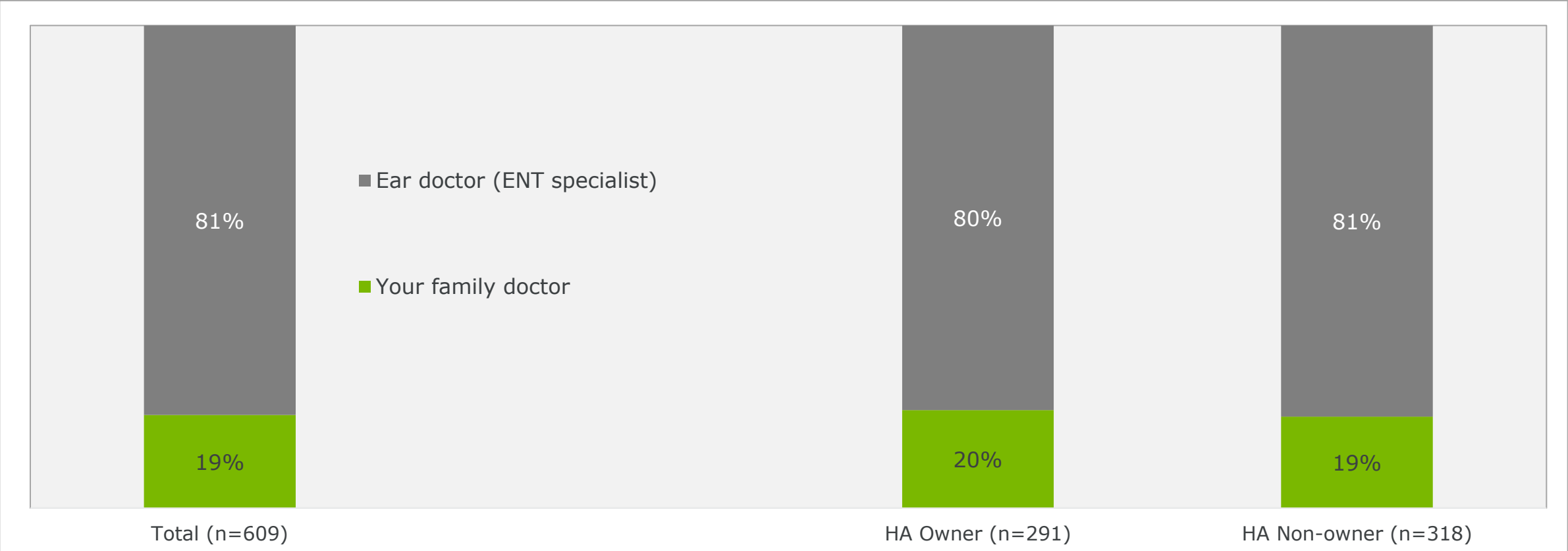


Impaired HA Non-owner (n=306)



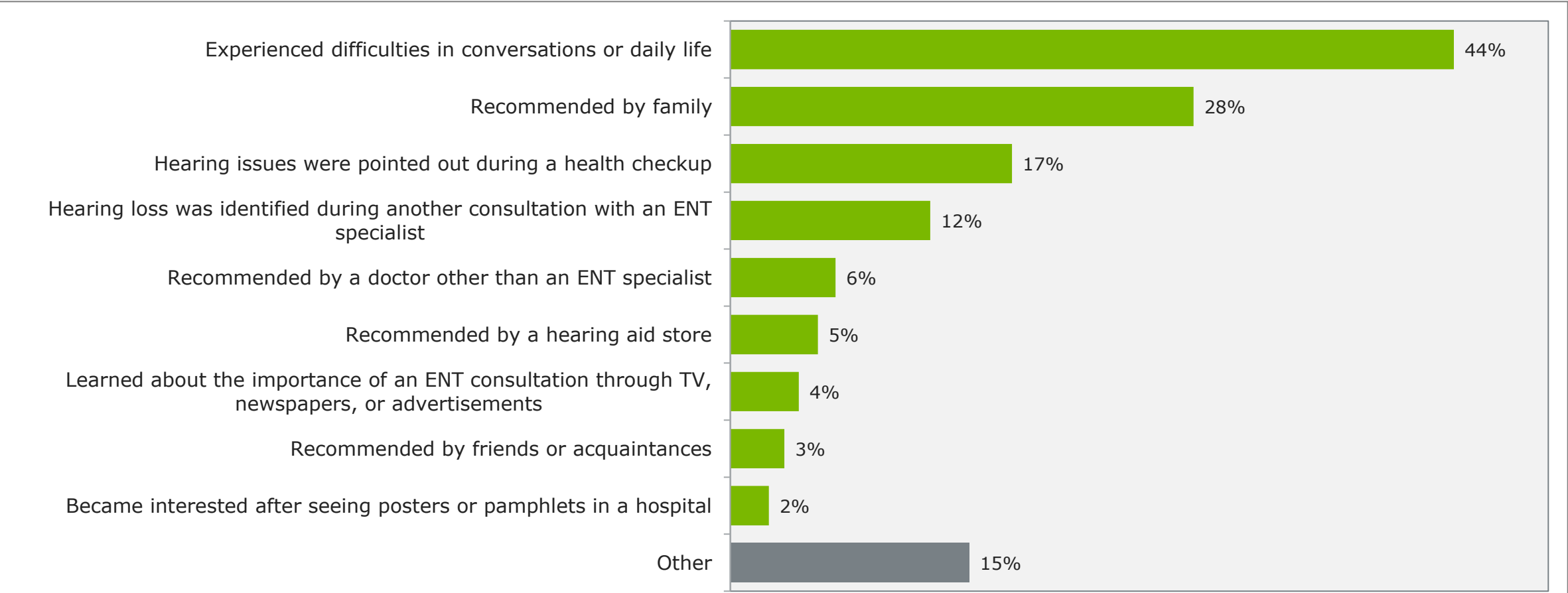
Of those who discussed the hearing loss with a doctor, 19% spoke to a GP/family doctor first, and 81% talked to an ear doctor (ENT) first

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



Reasons for visiting an ENT: Experienced hearing difficulties and family recommendation

IF VISITED ENT: What prompted you to visit an otolaryngologist regarding your hearing loss?

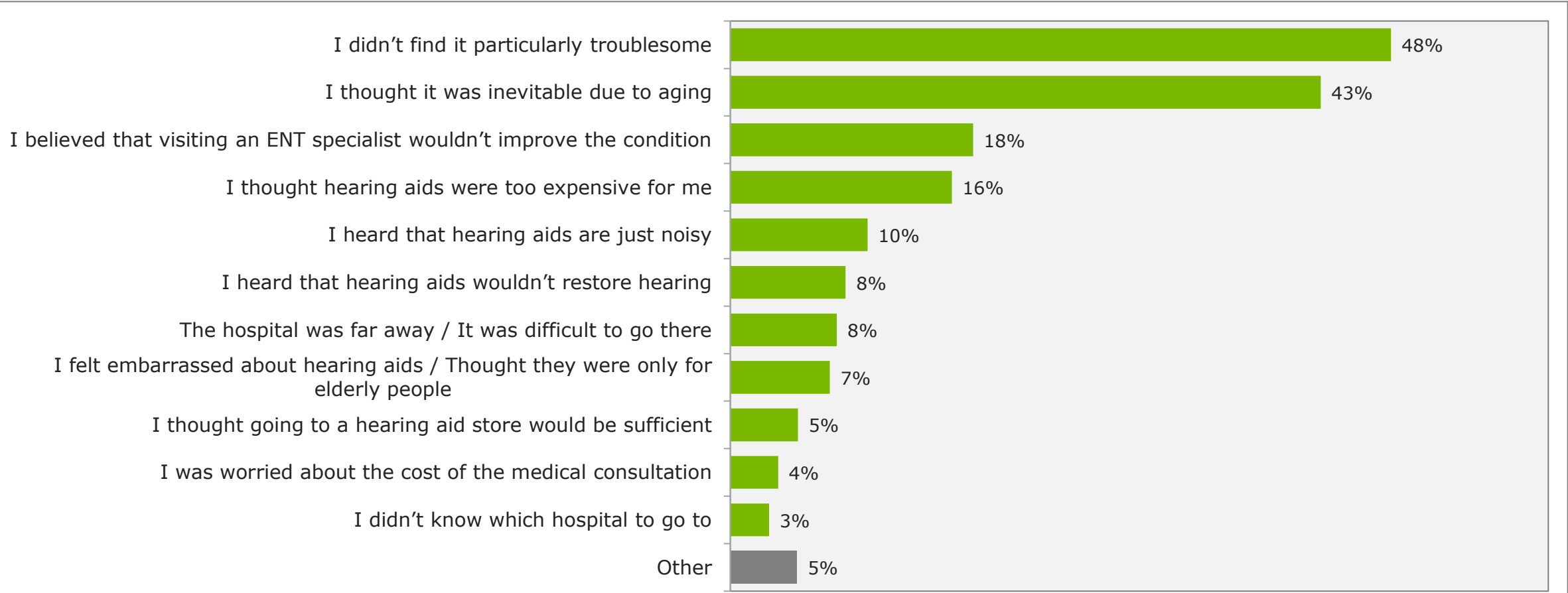


n=591



Reasons for not visiting an ENT: Hearing loss not perceived as troublesome and seen as an inevitable part of aging

IF NOT VISITED ENT: What were the reasons for not visiting an ear doctor (ENT) / otolaryngologist despite being aware of your hearing loss?



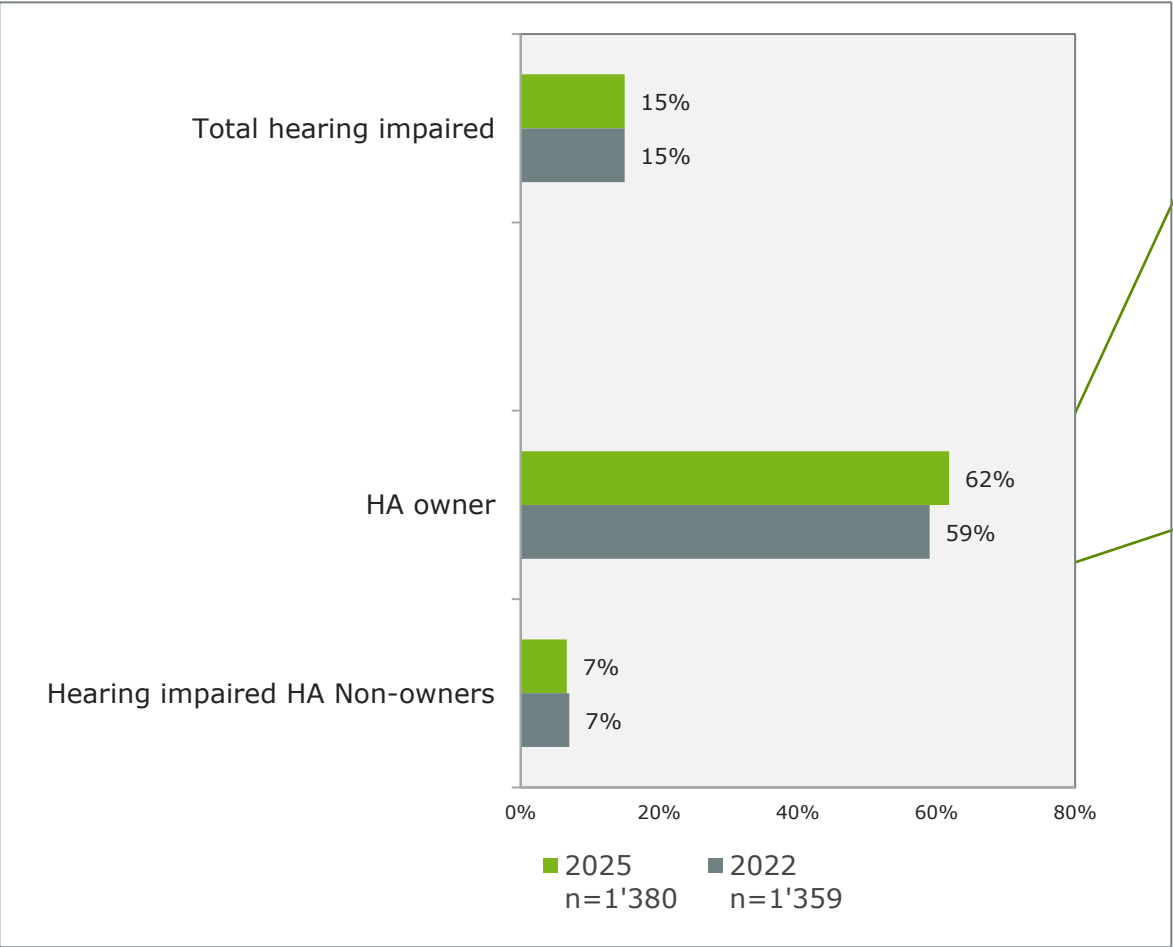
n=718



The route to the hearing aid: Audiologist

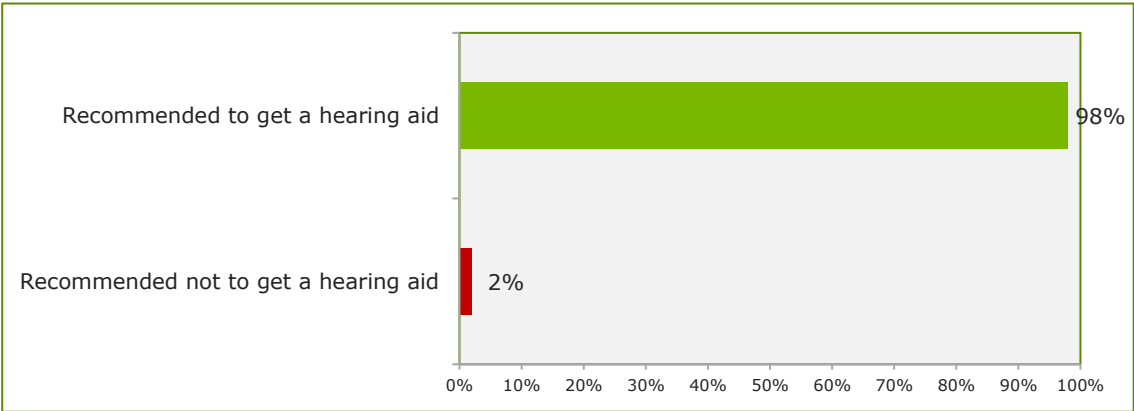
Have you ever discussed your hearing problem with a Hearing aid dispenser / Audiologist?

% Discussed with Audiologist

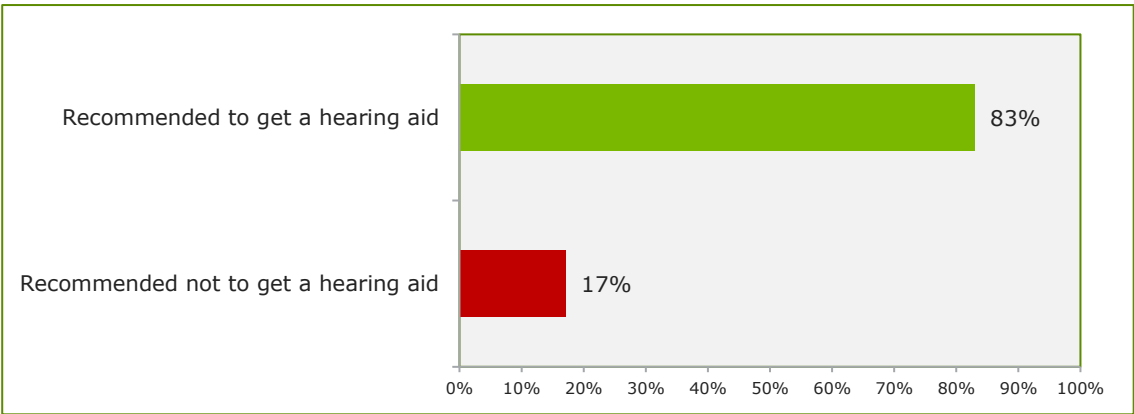


What did he/she recommend ?

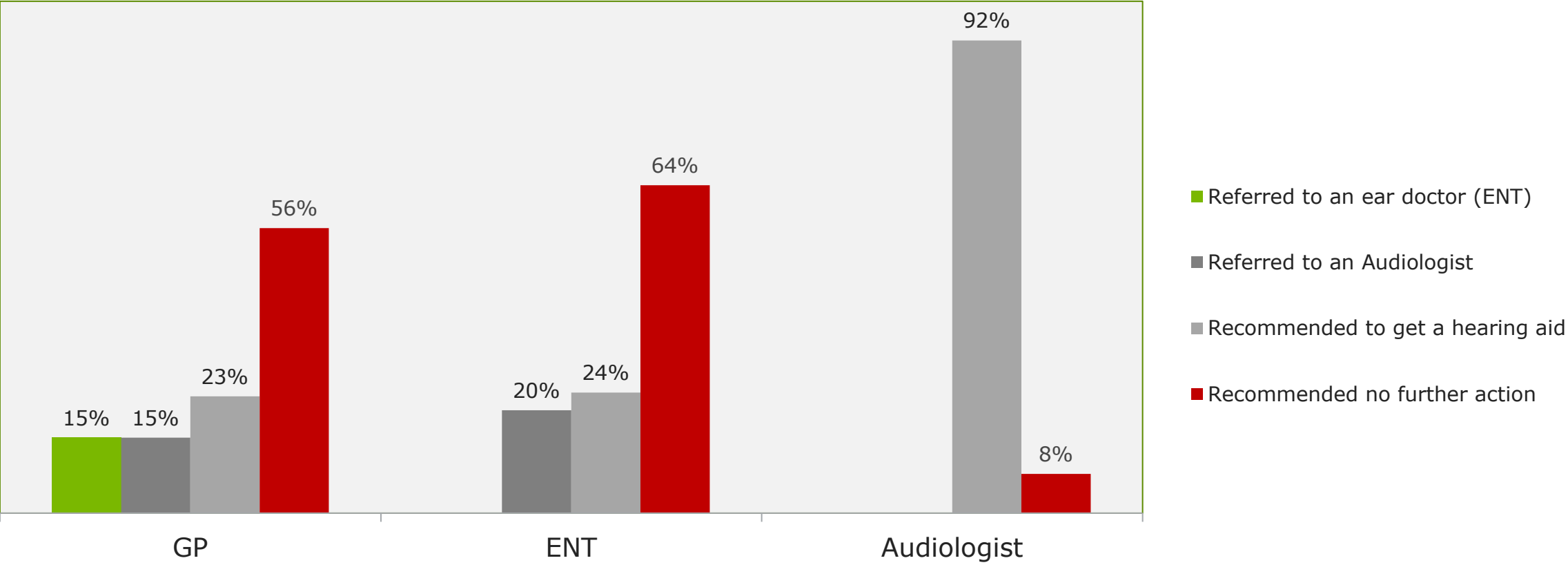
HA Owner (n=269)



Impaired HA Non-owner (n=57)



Recommendations by profession



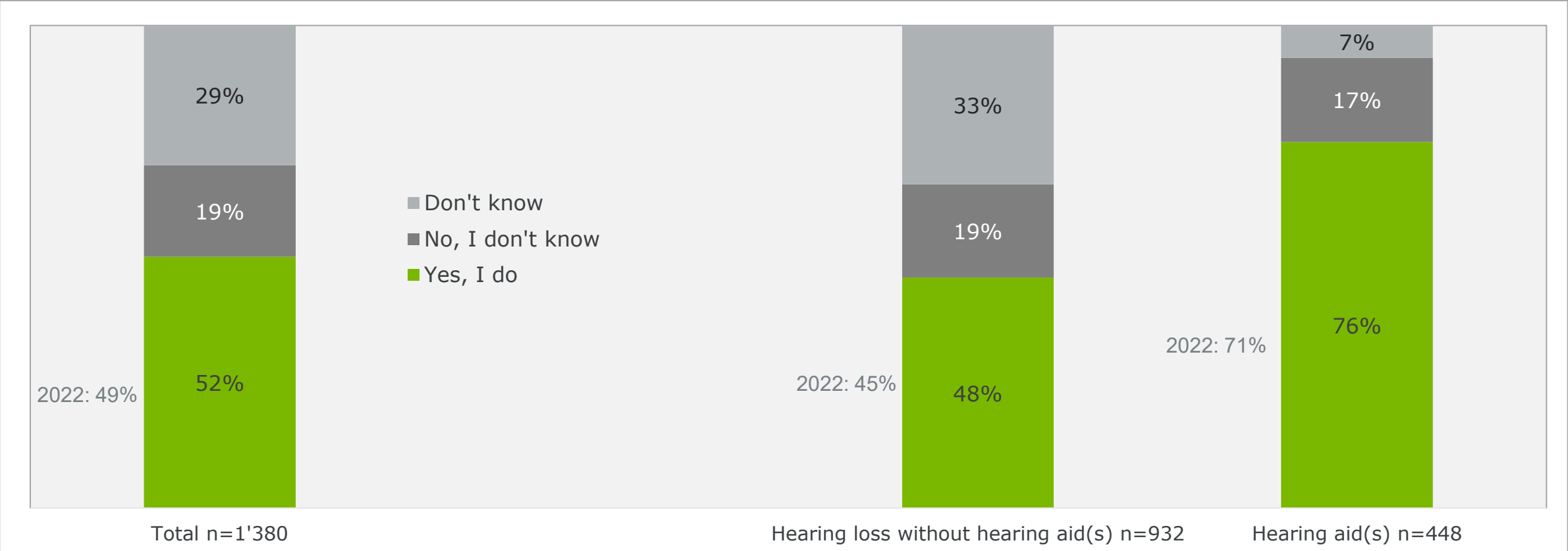
Sums can add to more than 100% (multiple responses)

GP n=494
ENT n=591
HA Dispenser n=326



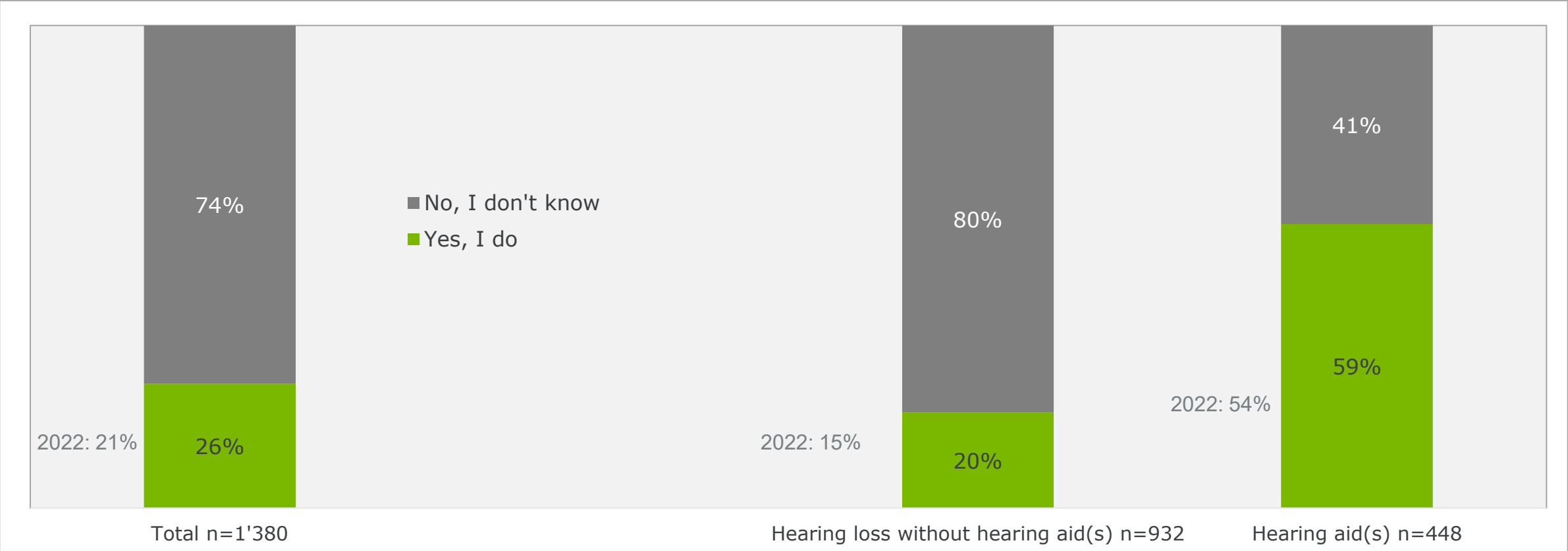
Awareness of hearing aid shops is slightly increasing

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



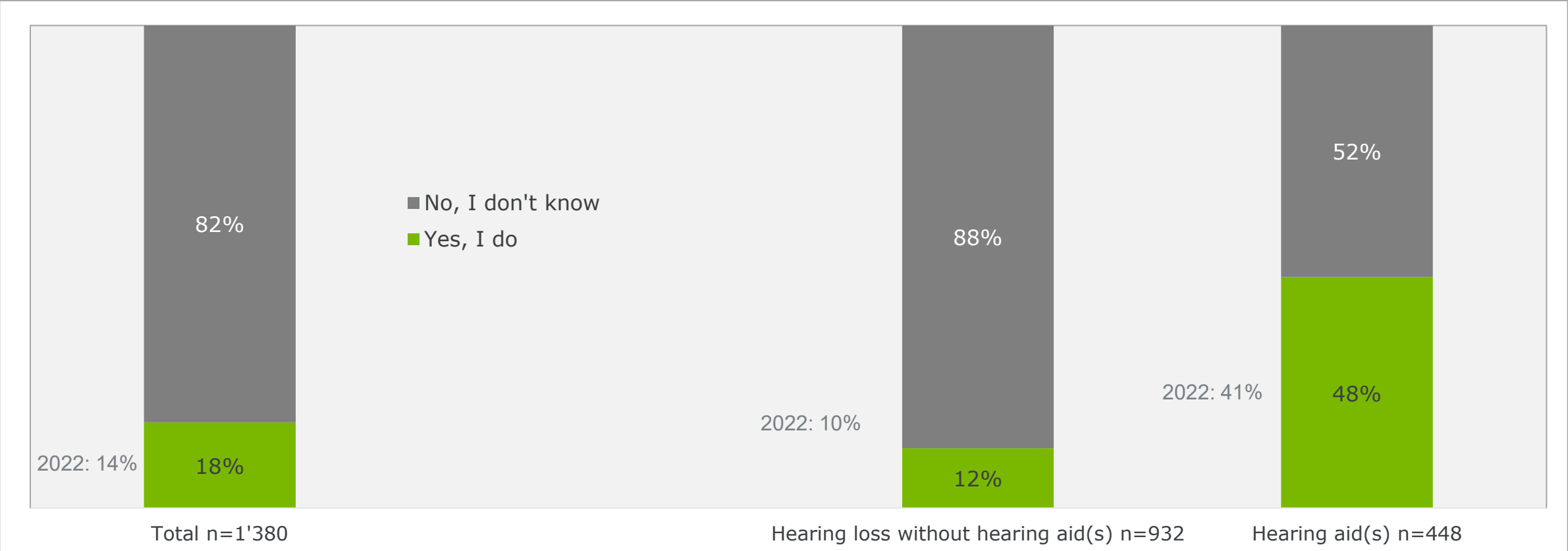
26% of the hearing impaired know what a 'Nintei-Hocyouki-Senmon-Ten' is – 59% of hearing aid owners

Do you know, what the following expressions mean? Nintei - Hocyouki - Senmon - Ten (“Certified hearing aid specialist store”)



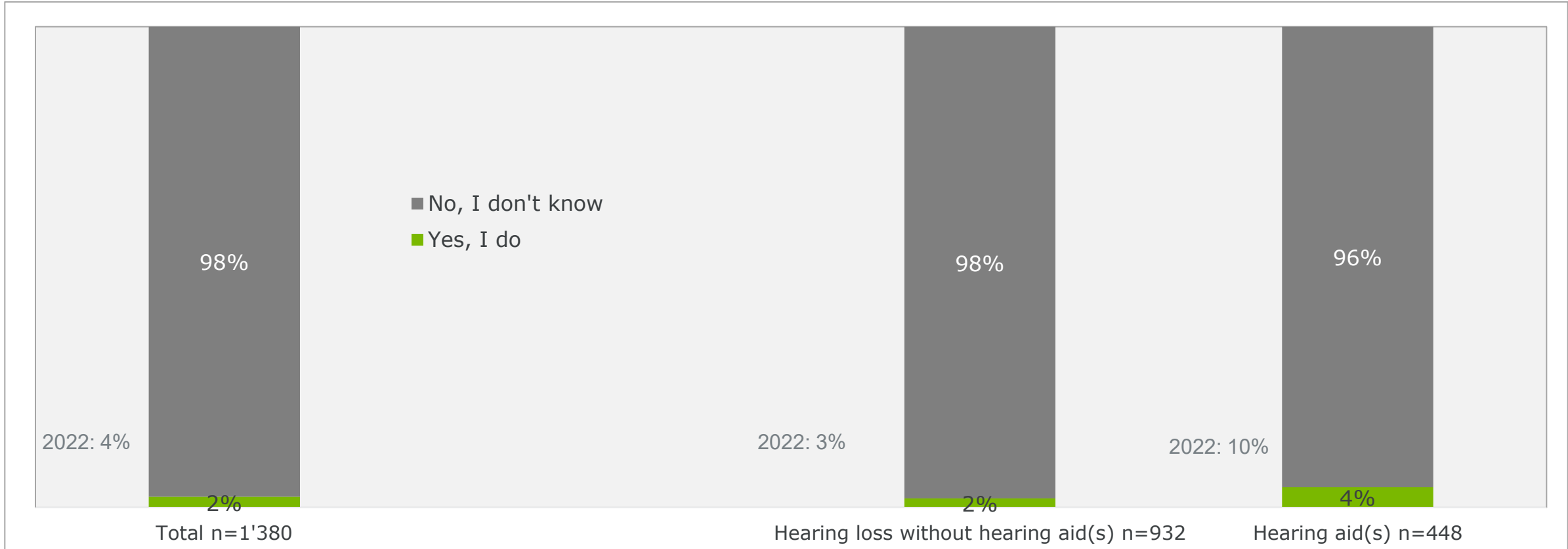
18% of all hearing impaired know what a 'Nintei-Hocyouki-Ginou-Sha' is – 48% of hearing aid owners

Do you know, what the following expressions mean? Nintei - Hocyouki - Ginou – Sha (“Certified Hearing Aid Technician”)



People are not aware of “Techno-aid-kyoukai”

Do you know, what the following expressions mean? Techno-aid-kyoukai (“Techno-Aids Association”)





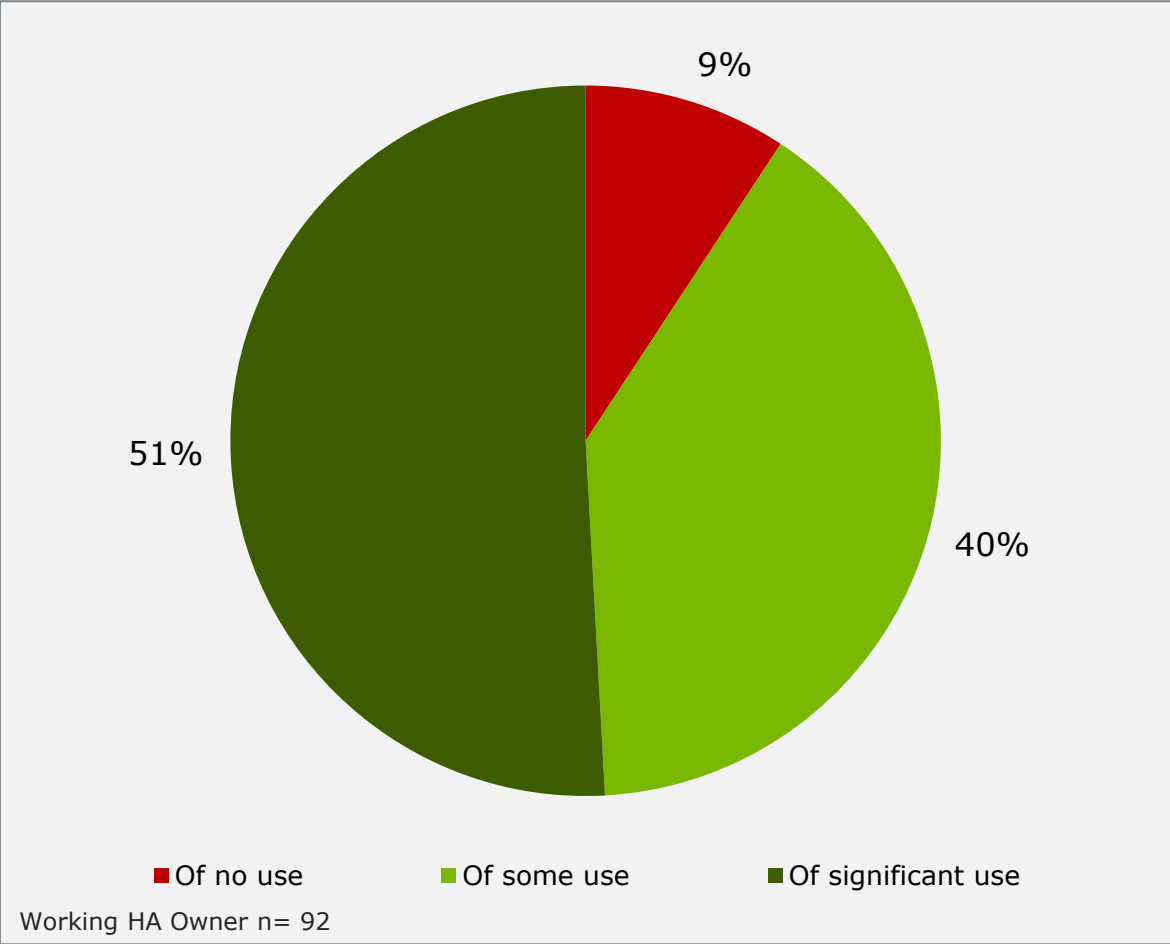
Potential social cost-savings due to the use of hearing aids:

Work competitiveness, depressive symptoms, sleep quality, co-morbidities



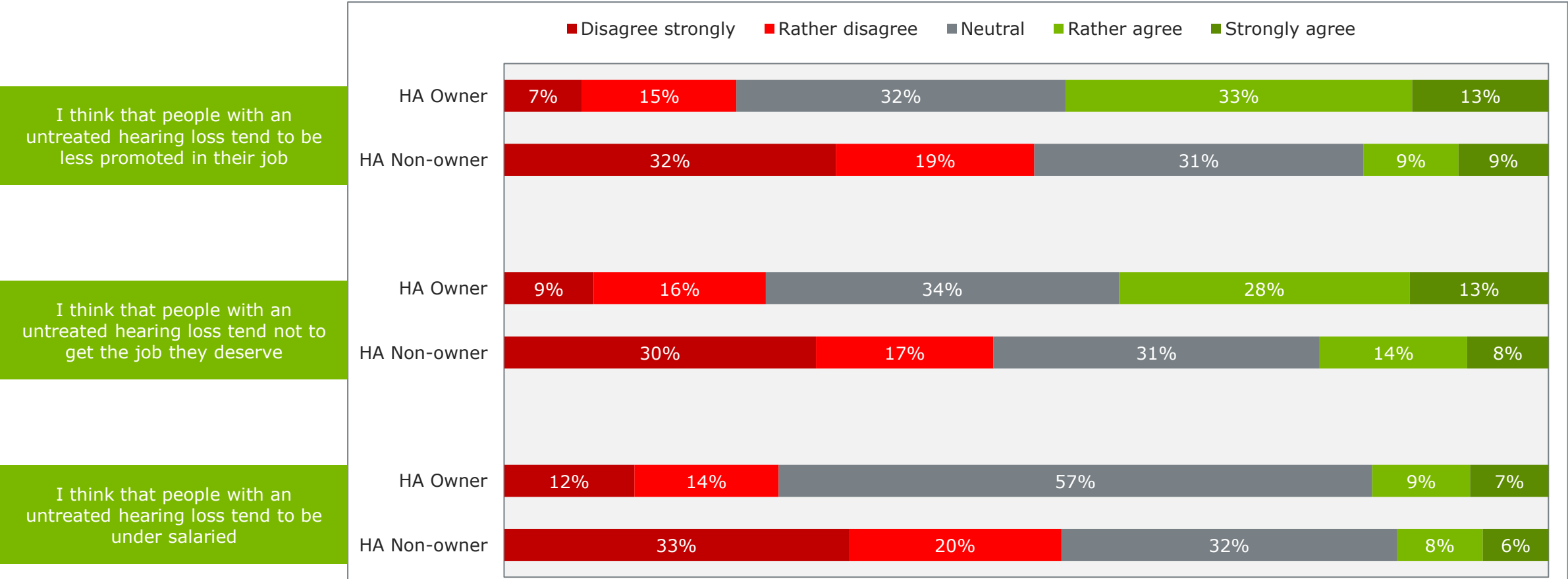
Work competitiveness: 91% of the working hearing aid owners state that their hearing aid(s) are useful on their job

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 getting promoted, getting the right job and to get a higher salary



HA Owner n=312 / HA Non-owner n=636

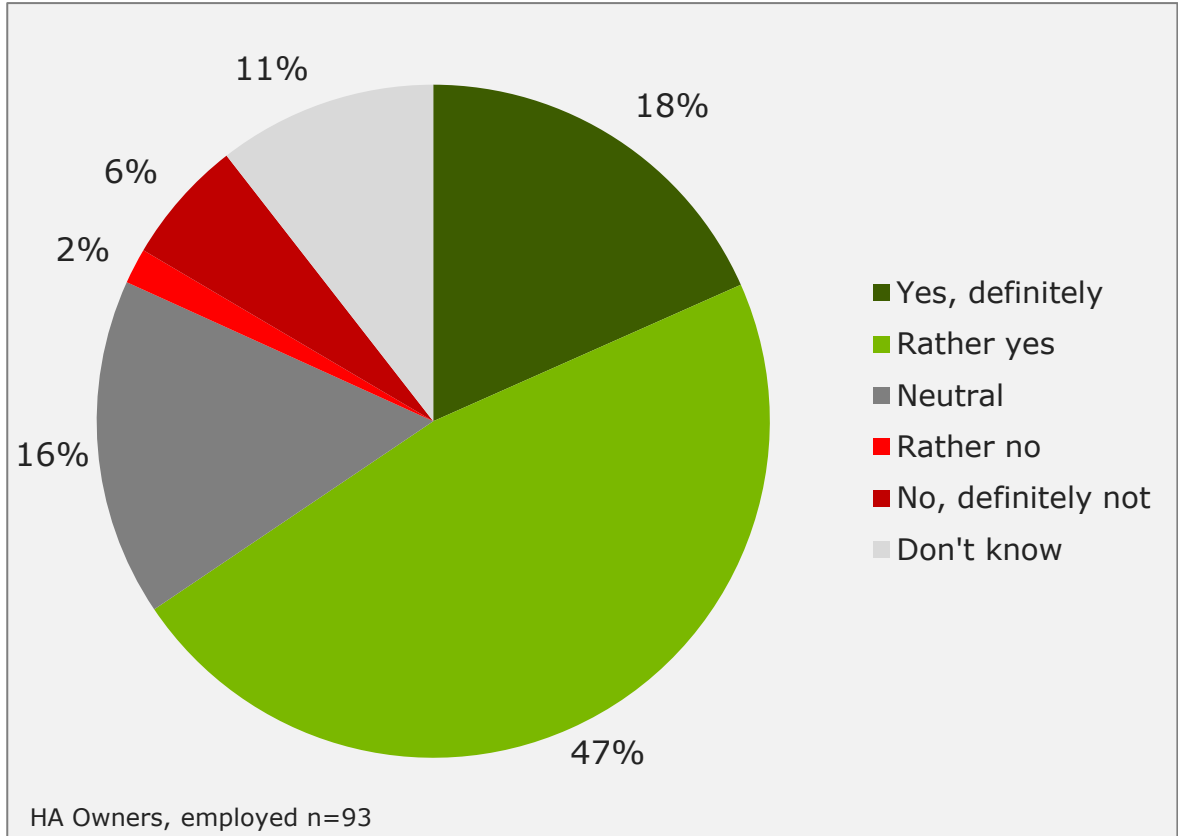




2/3 of employed individuals using hearing aids believe the devices enable them to work longer

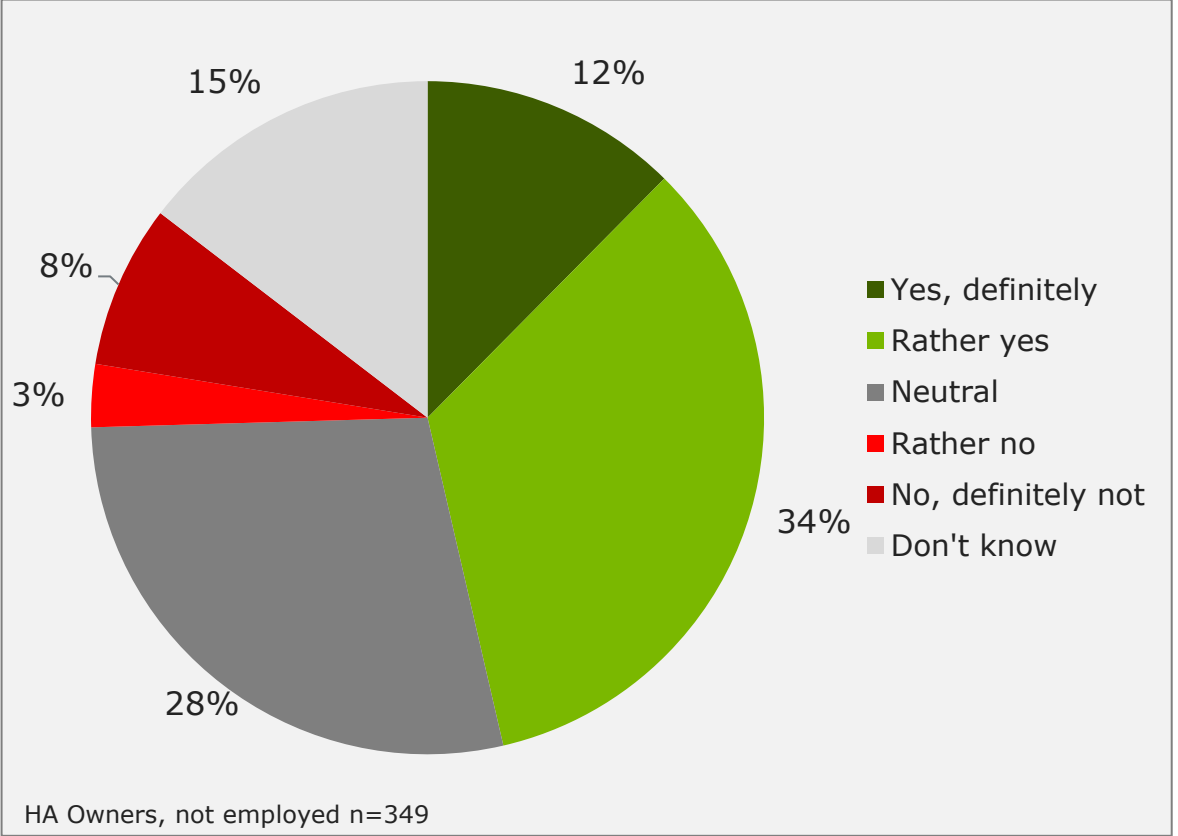
HA Owners, employed:

Do you believe that due to your hearing aid provision you can be employed longer than without hearing aid(s)?



HA Owners, NOT employed:

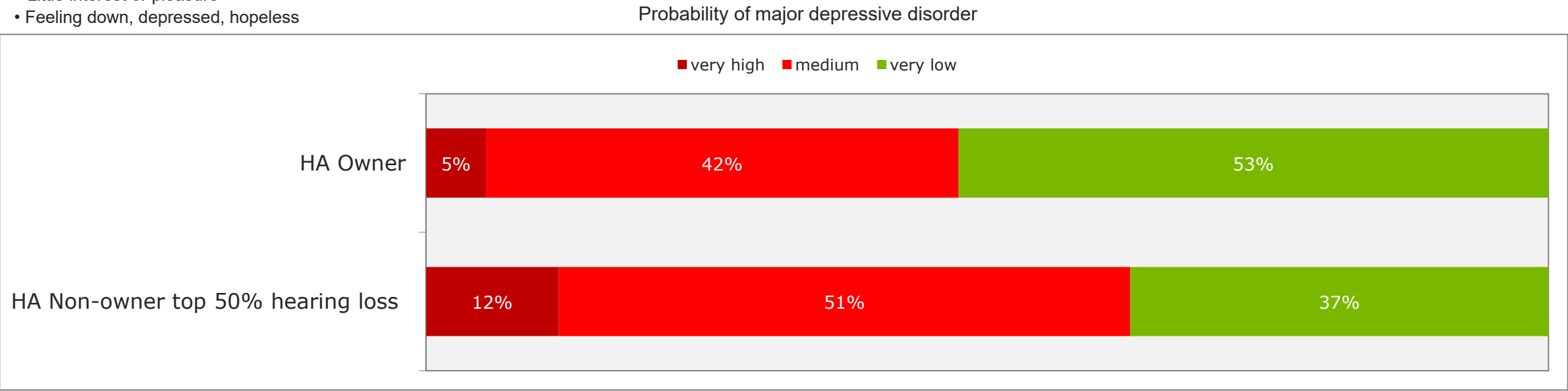
Do you believe that due to your hearing aid provision you could have been employed longer than without hearing aid(s)?





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

Depression symptoms:
PHQ-2 Screening:
In the last 2 weeks:
• Little interest or pleasure
• Feeling down, depressed, hopeless



HA owner n=355 / HA Non-owner top 50% hearing loss n=195

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

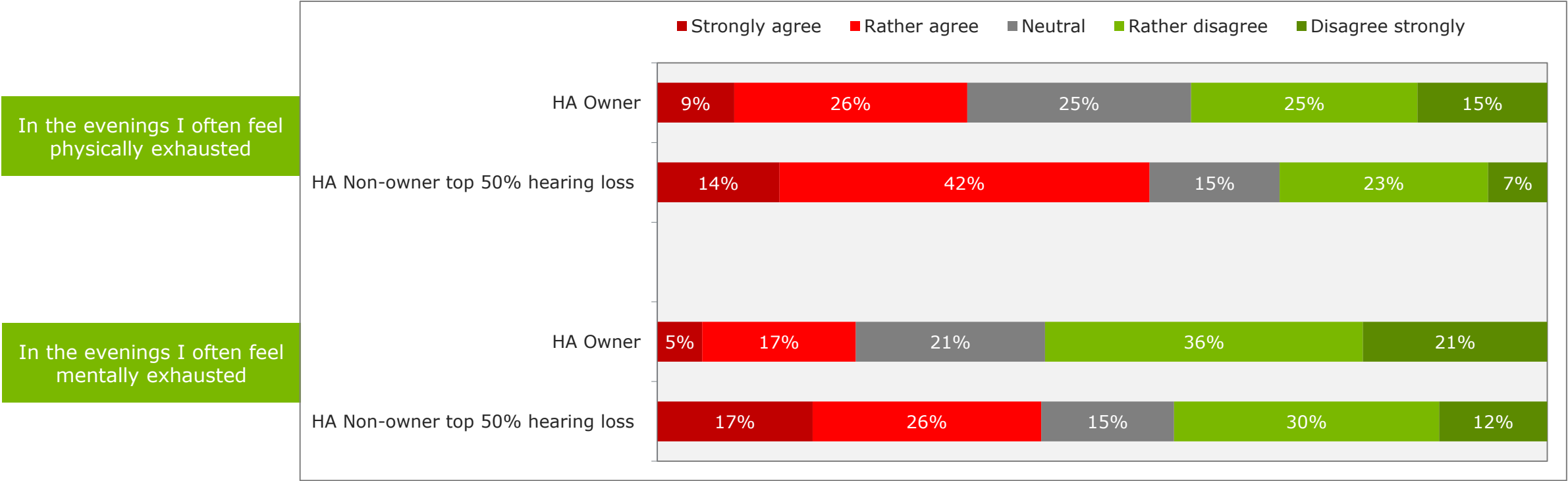
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

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





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



HA Owner n=345 / HA Non-owner top 50% hearing loss n=191

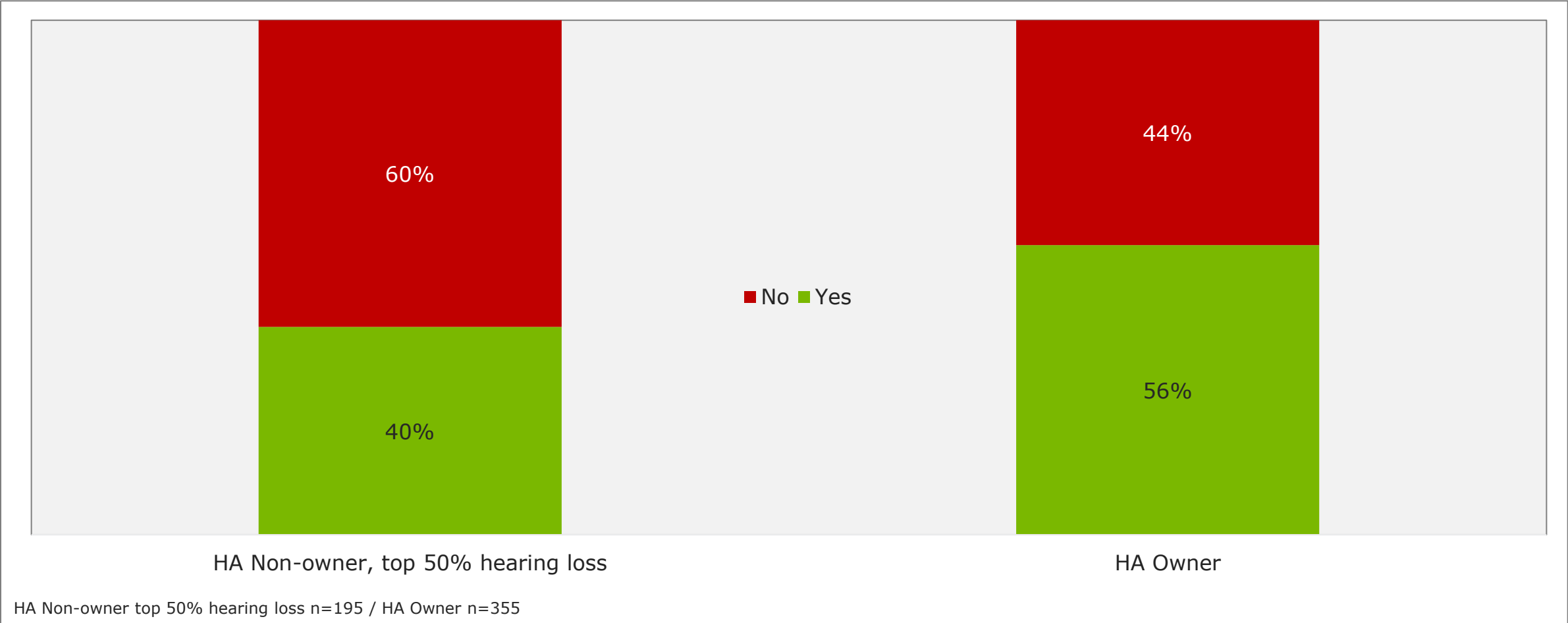
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- People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



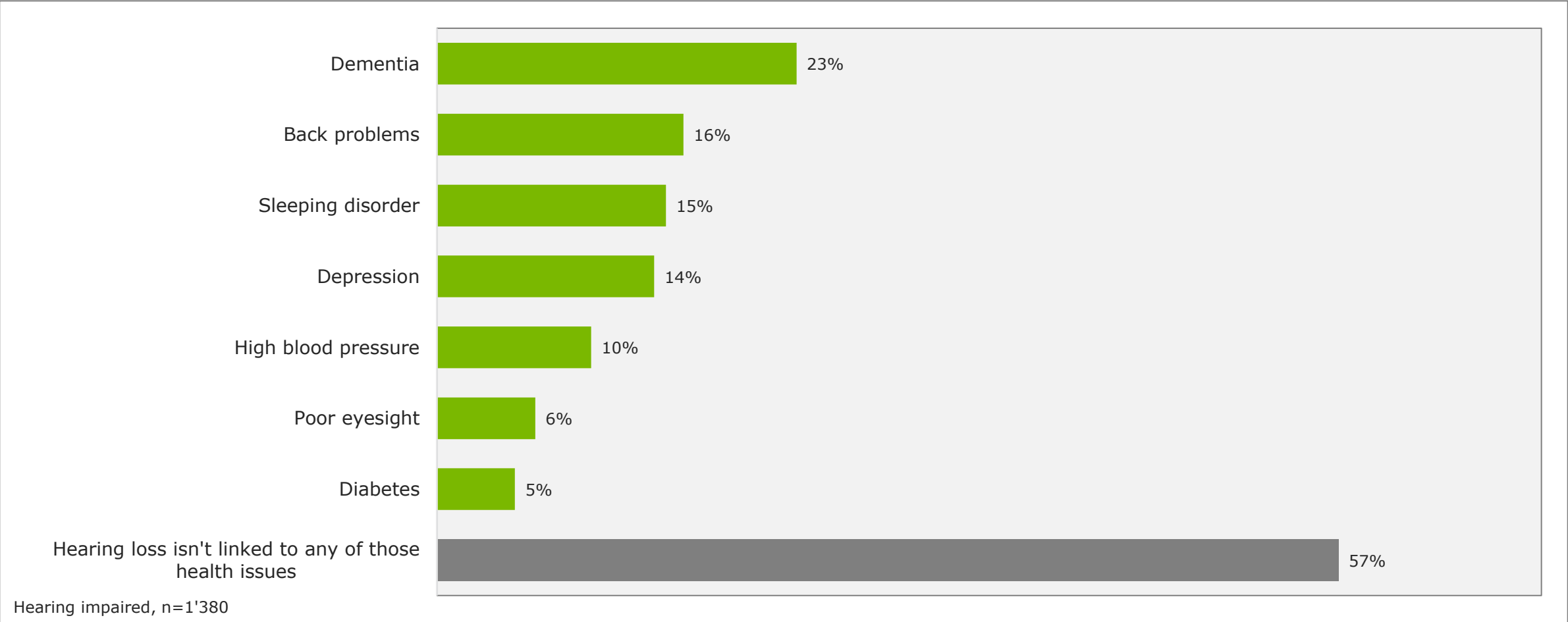
General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?



23% of all hearing-impaired think that hearing loss could be linked to dementia

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





3. Analysis of hearing aid owners



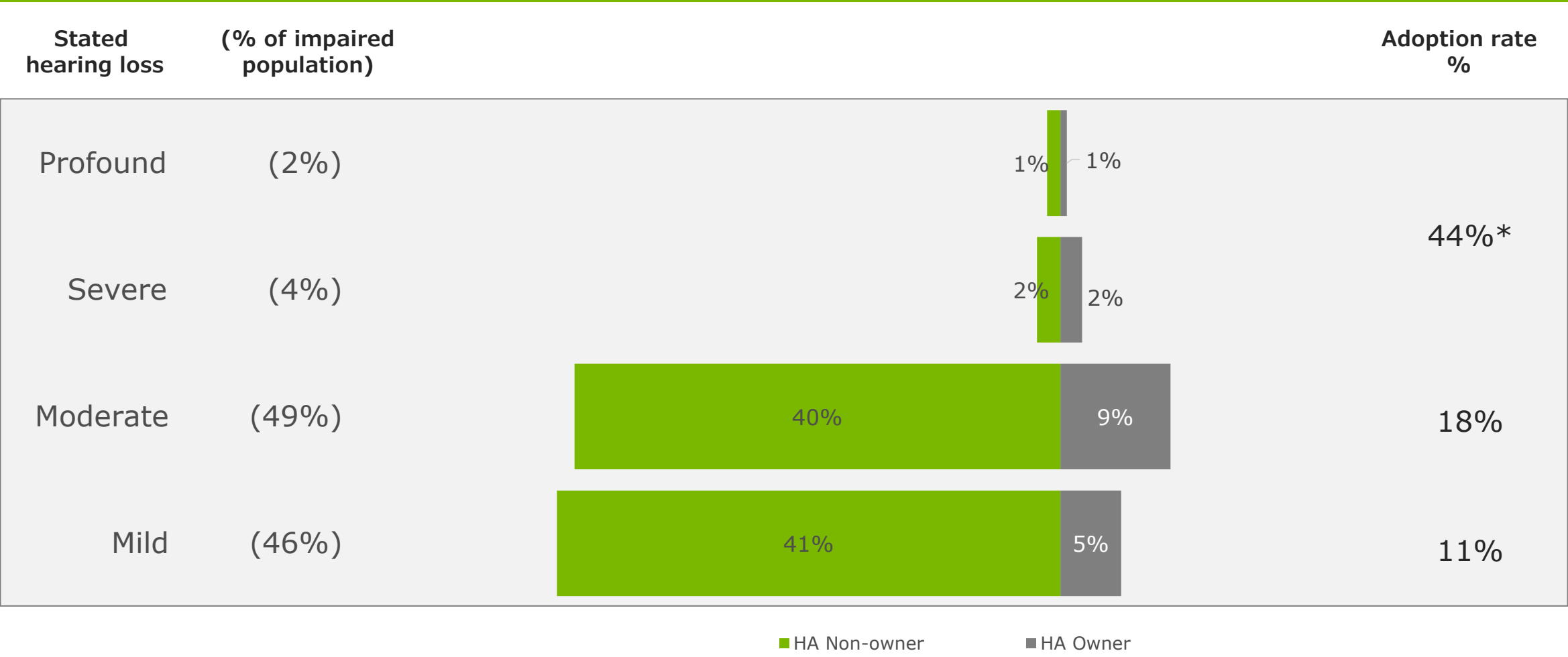


Hearing aid ownership, awareness of hearing loss,
lifetime of hearing aids and usage





Low adoption rates within mild hearing loss

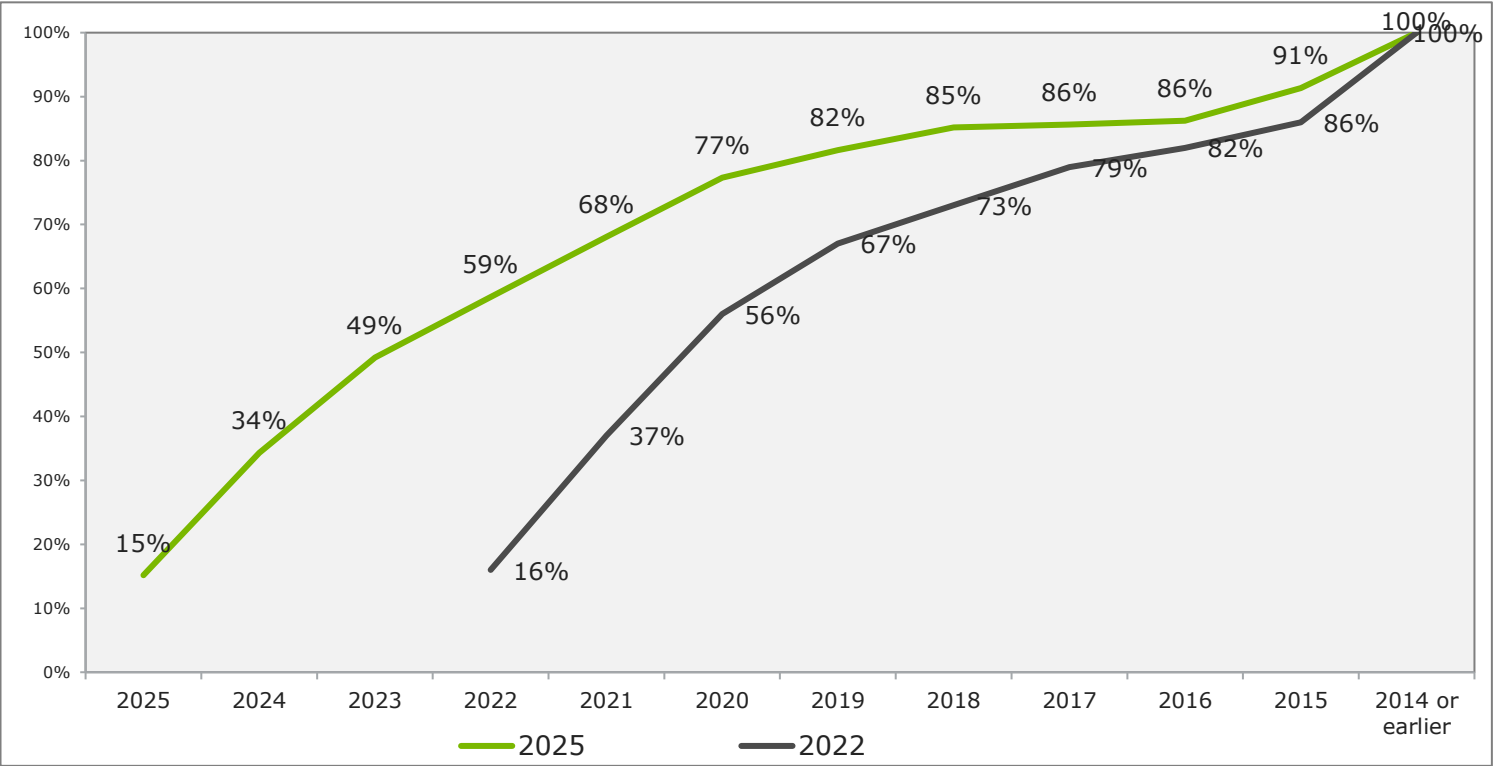


Sums can differ from 100% due to rounding
* combined "severe" and "profound" because n is too small



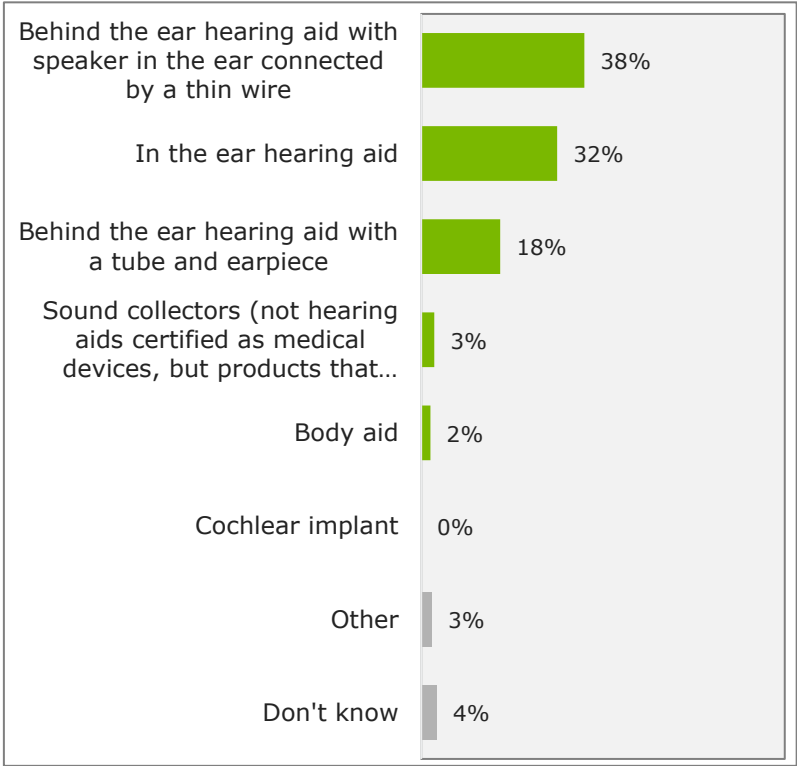
59% of the currently owned HAs were acquired in 2022 or later: RICs are the most often purchased type of HA

Year of purchase



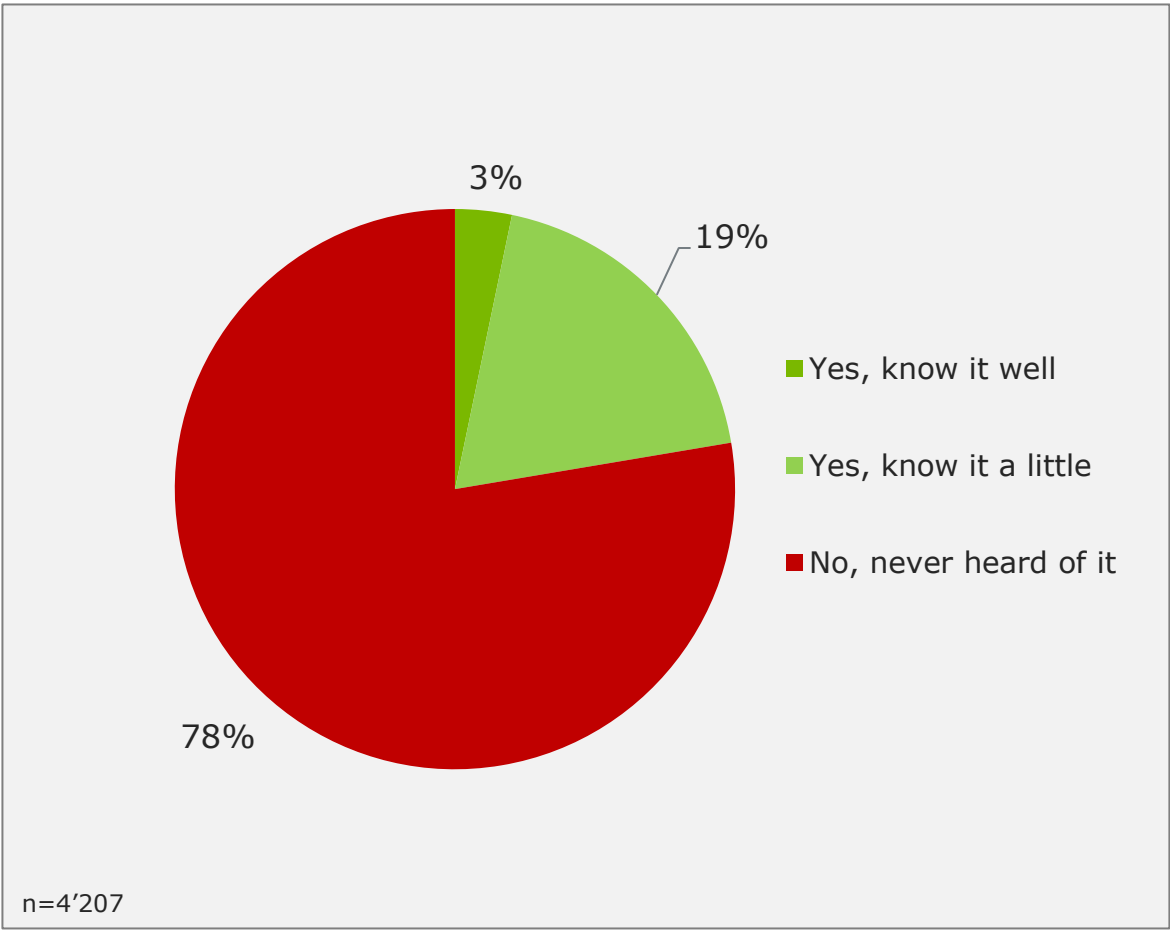
Age of currently owned HAs (Mean):
2025: 4.0 years
2022: 3.8 years

Type of HA



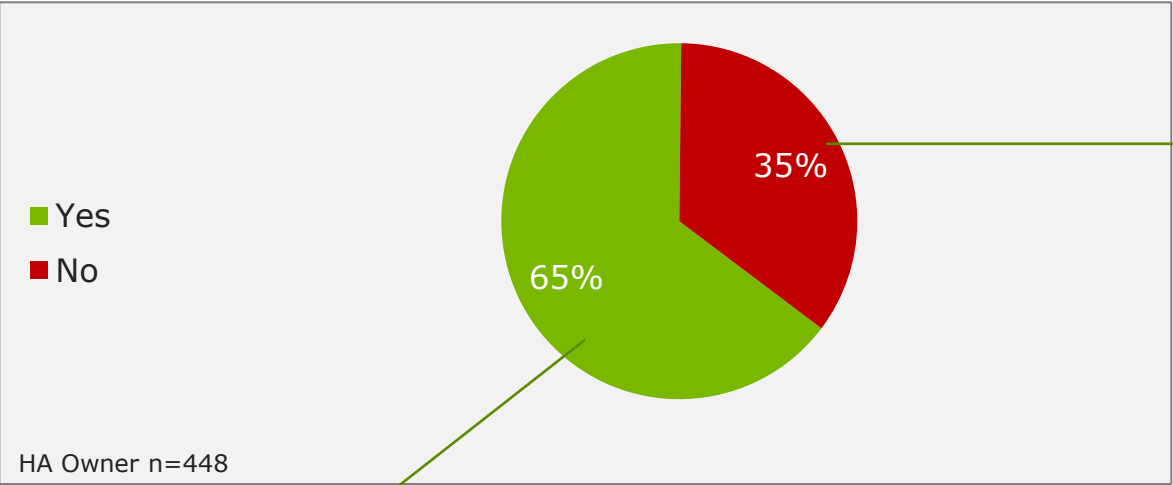
78% of the population has never heard of Cochlear Implants

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

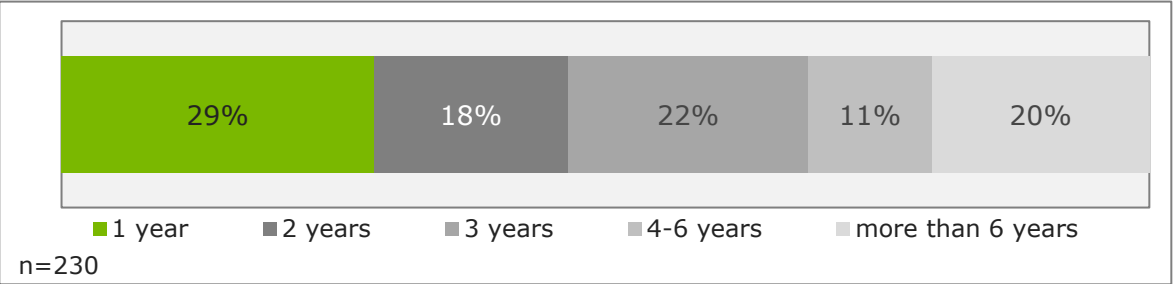


Hearing aids are used for five years before they are replaced. Mostly 2-6 years pass between becoming aware of the hearing loss and purchasing hearing aids

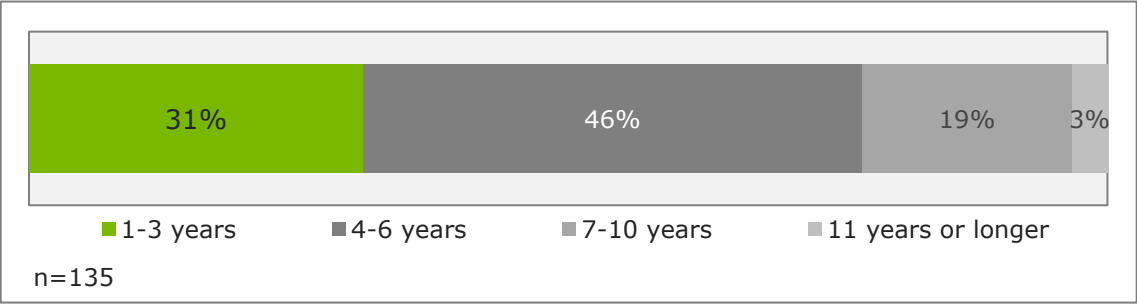
Current HAs = first HAs?



HA Owner (1st HA):
How many years have passed since you became aware of your hearing loss until you acquired a hearing aid?

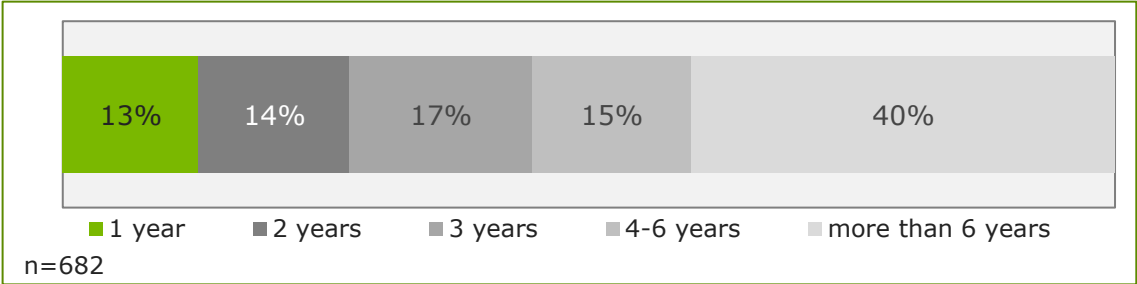


How many years did you own your previous HAs?



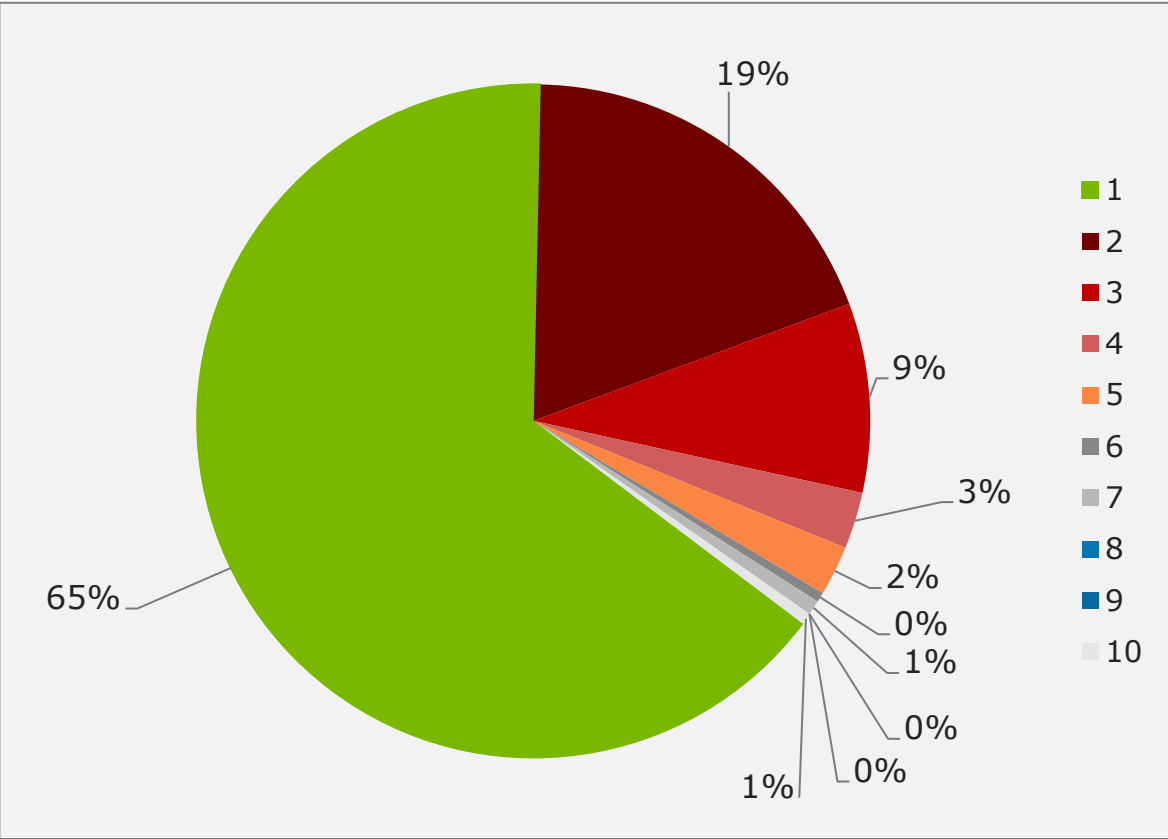
Age of HA before it has been replaced:
2025: 5 years (median)
2022: 4 years (median)

HA Non-owner:
How many years had passed since you became aware of your hearing loss?



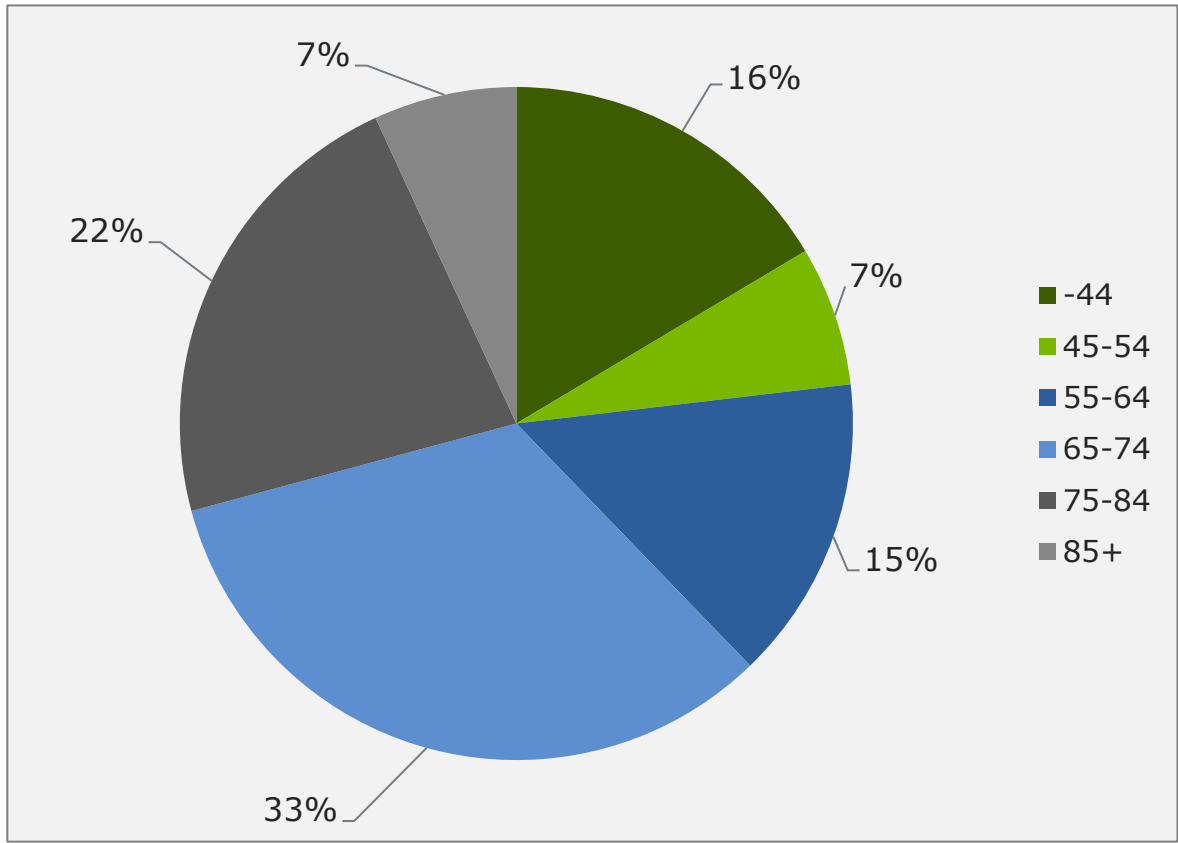
65% are first time users, 19% own hearing aids for the second time

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



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?

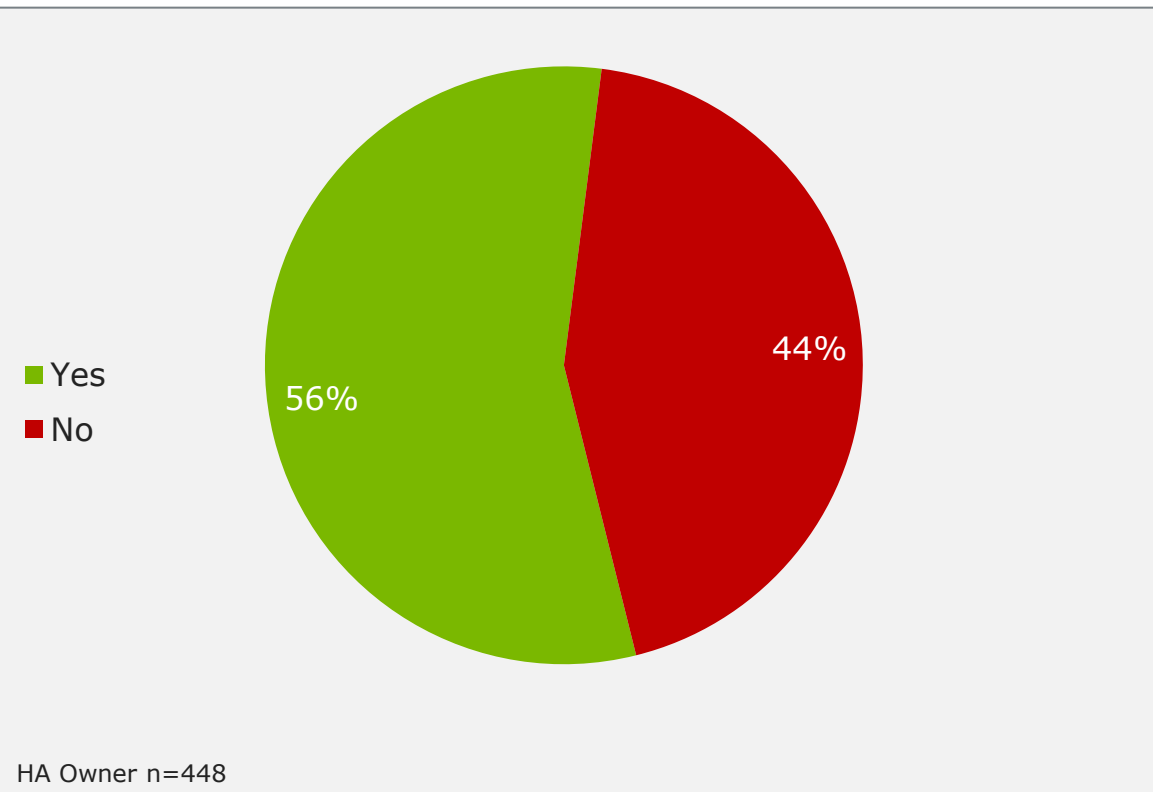


Median: 70 years (2022:72 years)



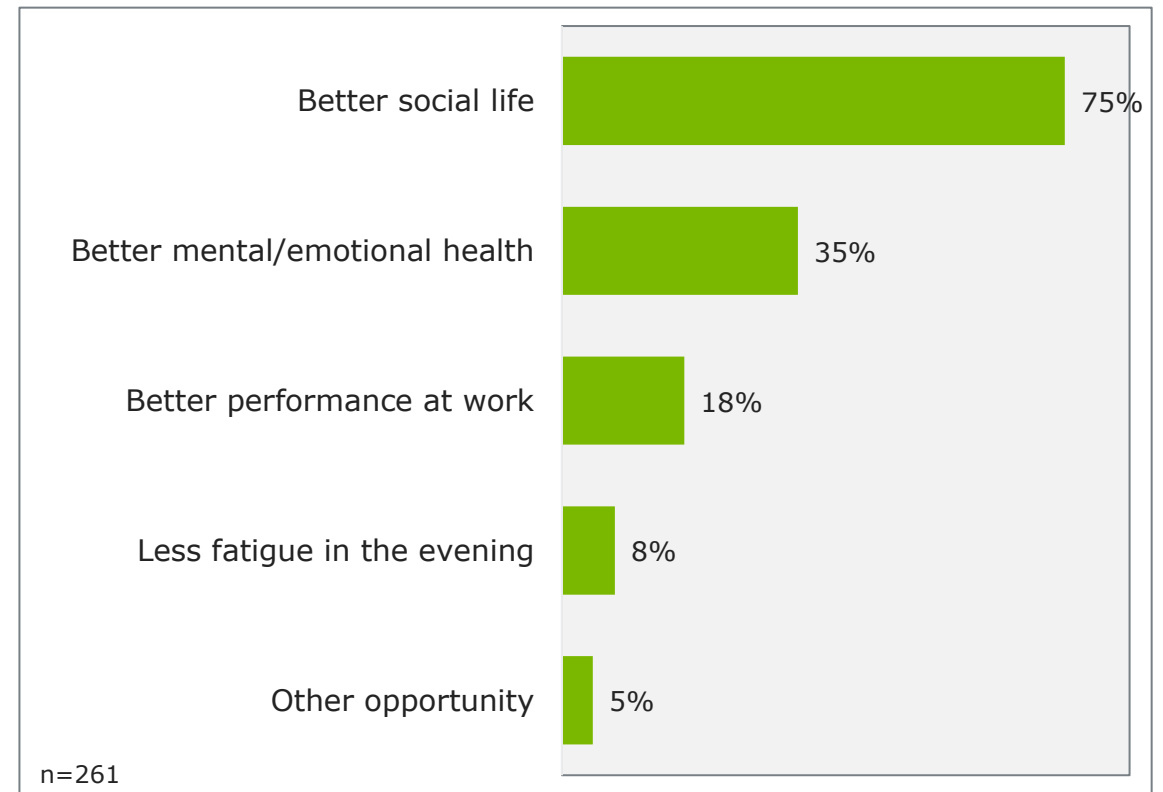
56% of all HA owners think they should have gotten their HAs sooner! The main reason is missing out on social life and mental/emotional health

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



IF YES:

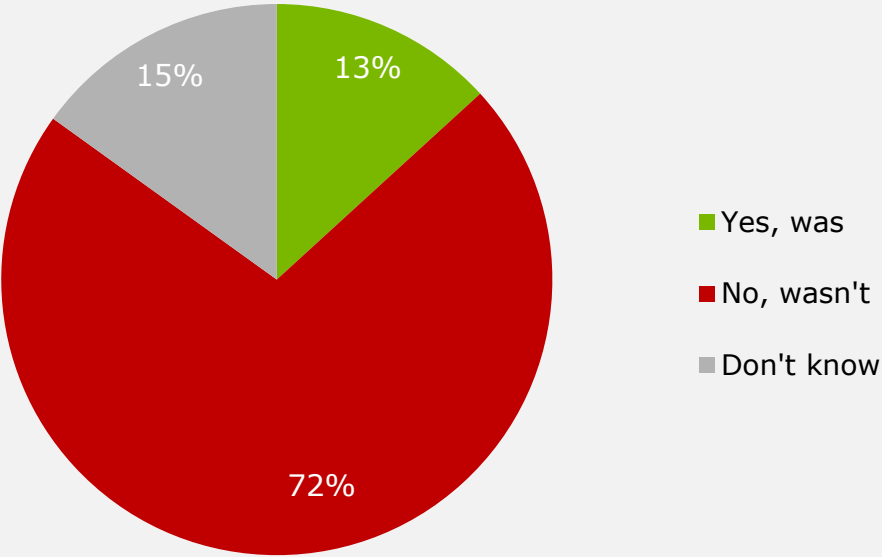
What are the reasons why you think you should have gotten your hearing aid(s) sooner? What are the opportunities you think you have missed because of this? Please tick all that apply.



13% received some kind of reimbursement from the government. 10% of non-owners know the system of supplying hearing aid(s) by the government.

HA Owner:

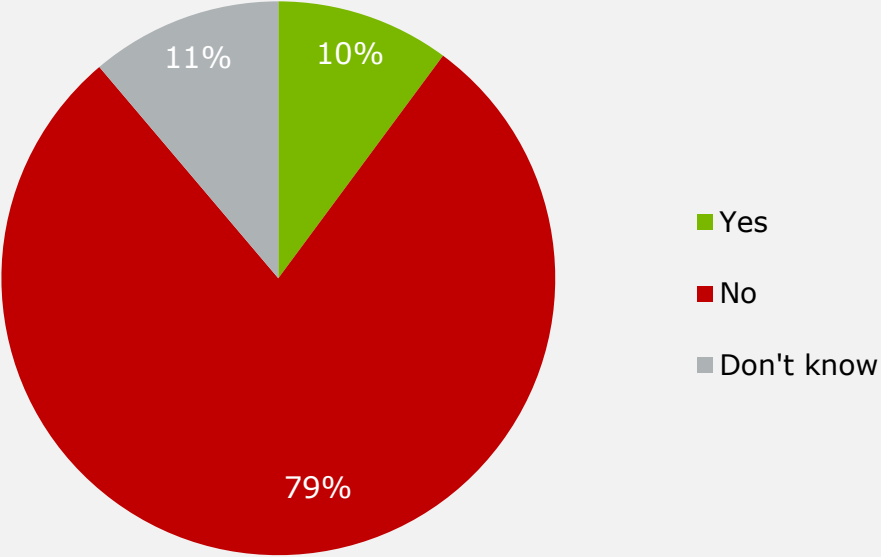
Was any part or all of your hearing aid(s) paid by the government?



HA Owner n=448

HA Non-owner:

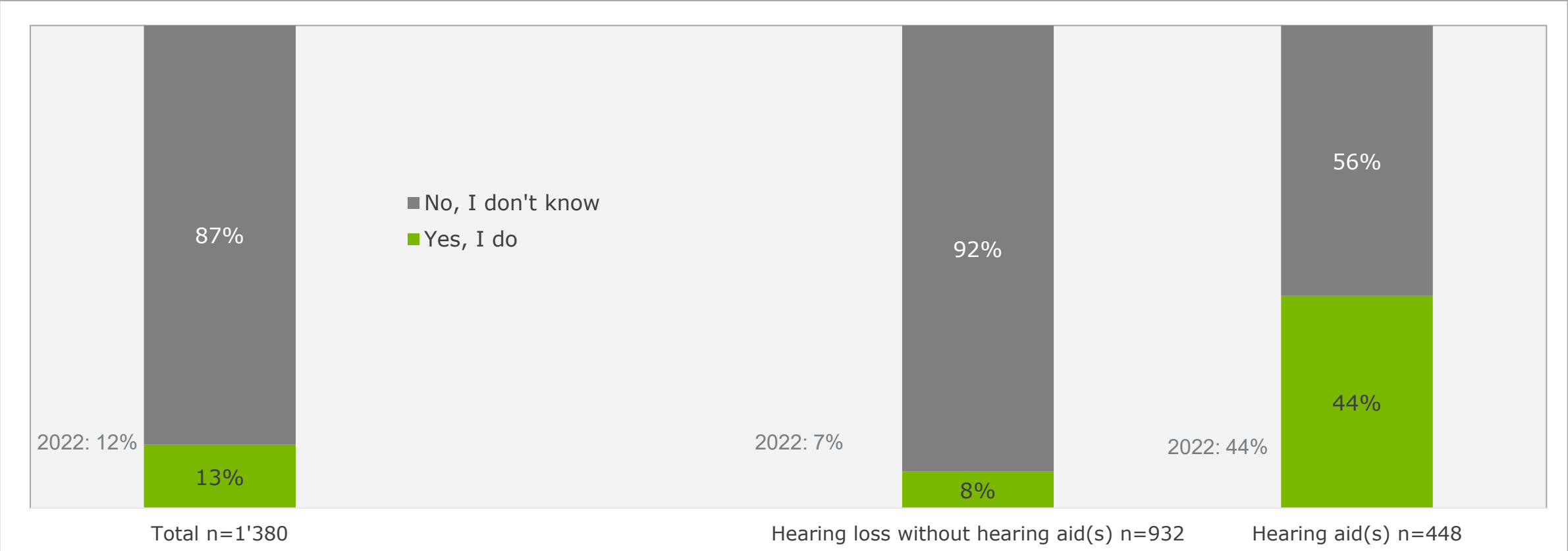
Do you know the system of supplying hearing aid by government ?



HA Non-owner n=932

13% of all hearing impaired know that hearing aids are untaxed articles in the VAT system – 44% of hearing aid owners

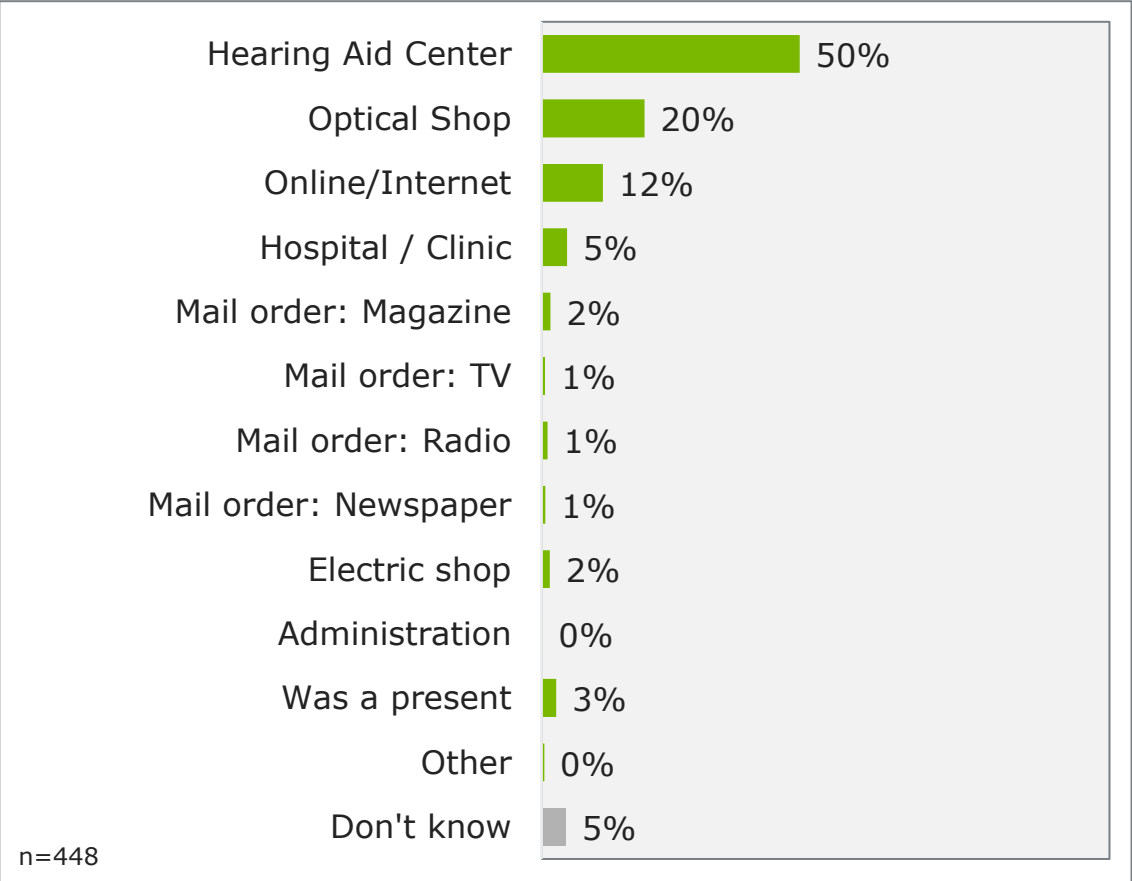
Do you know that hearing aids are untaxed articles in the Japanese Value added Tax system?



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

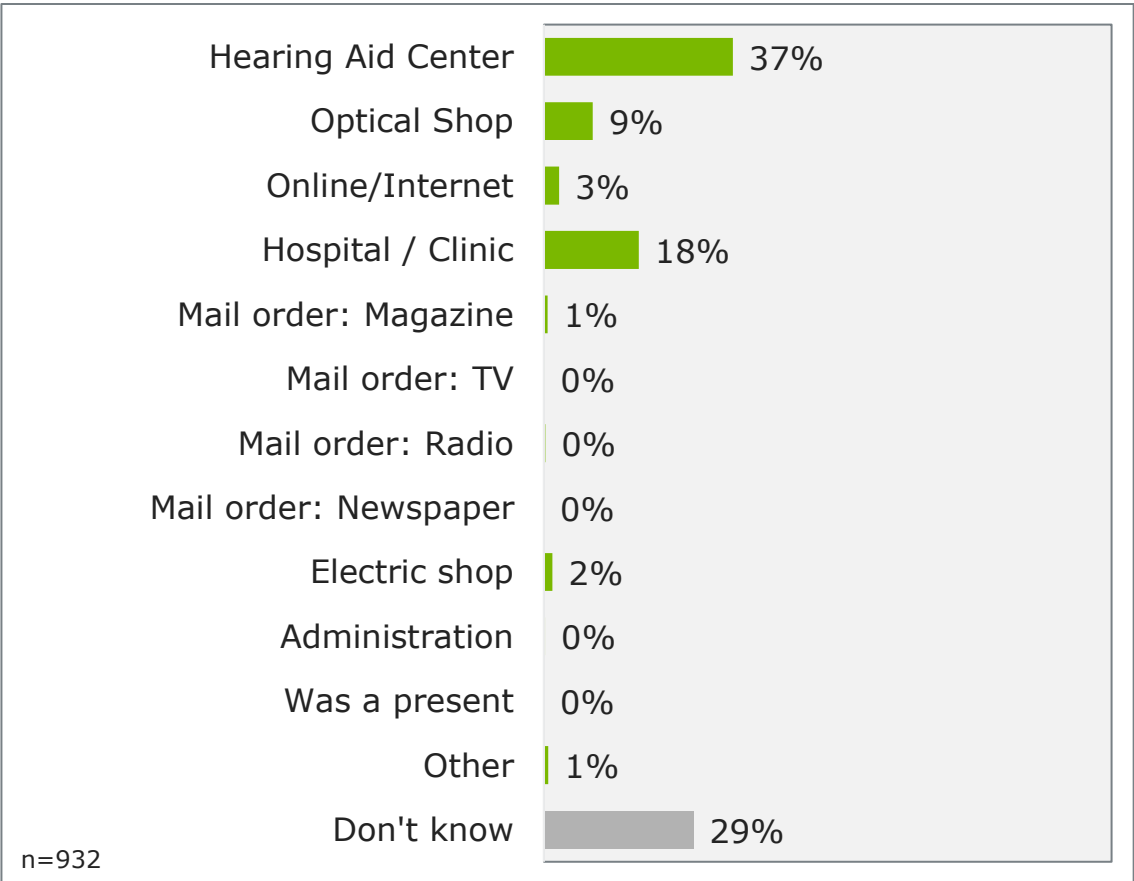
HA Owner:

Where was your most current hearing aid obtained?



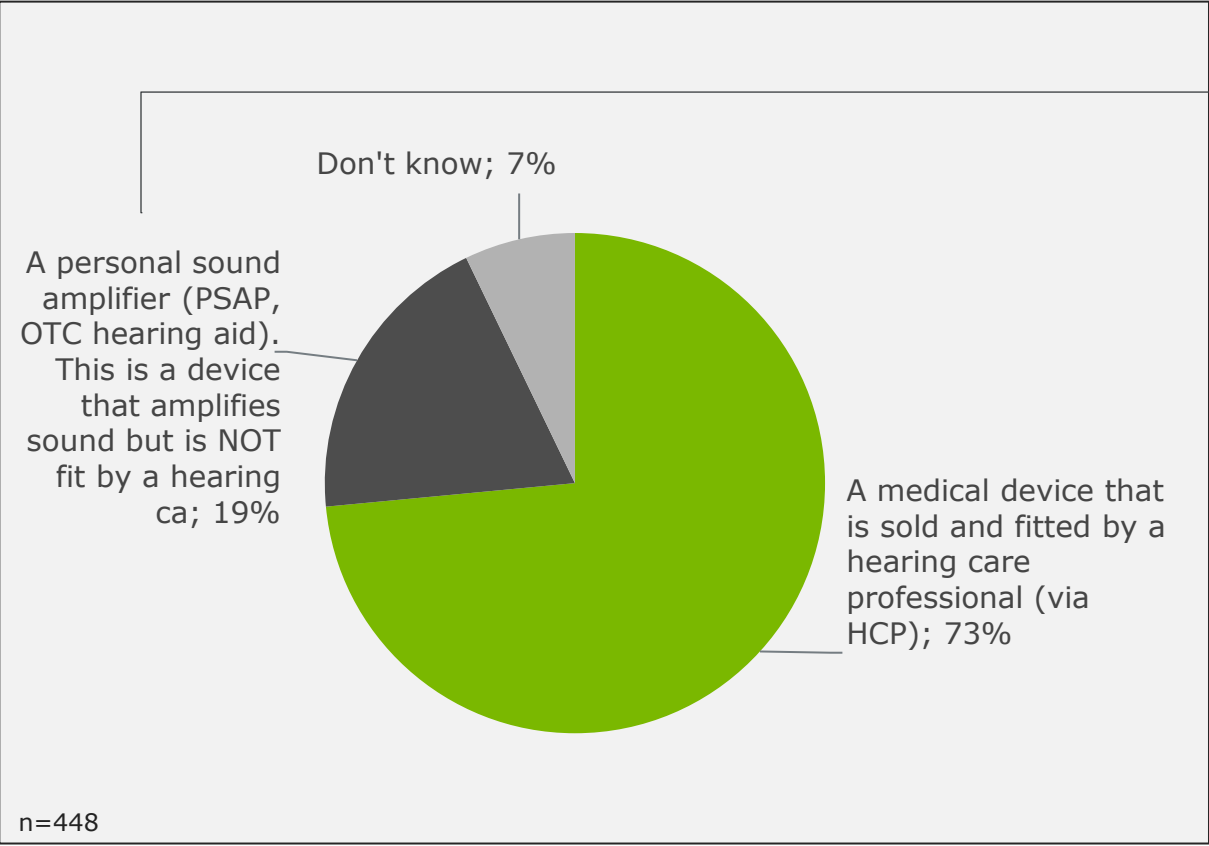
HA Non-owner:

If you were to get hearing aids, where would you go?

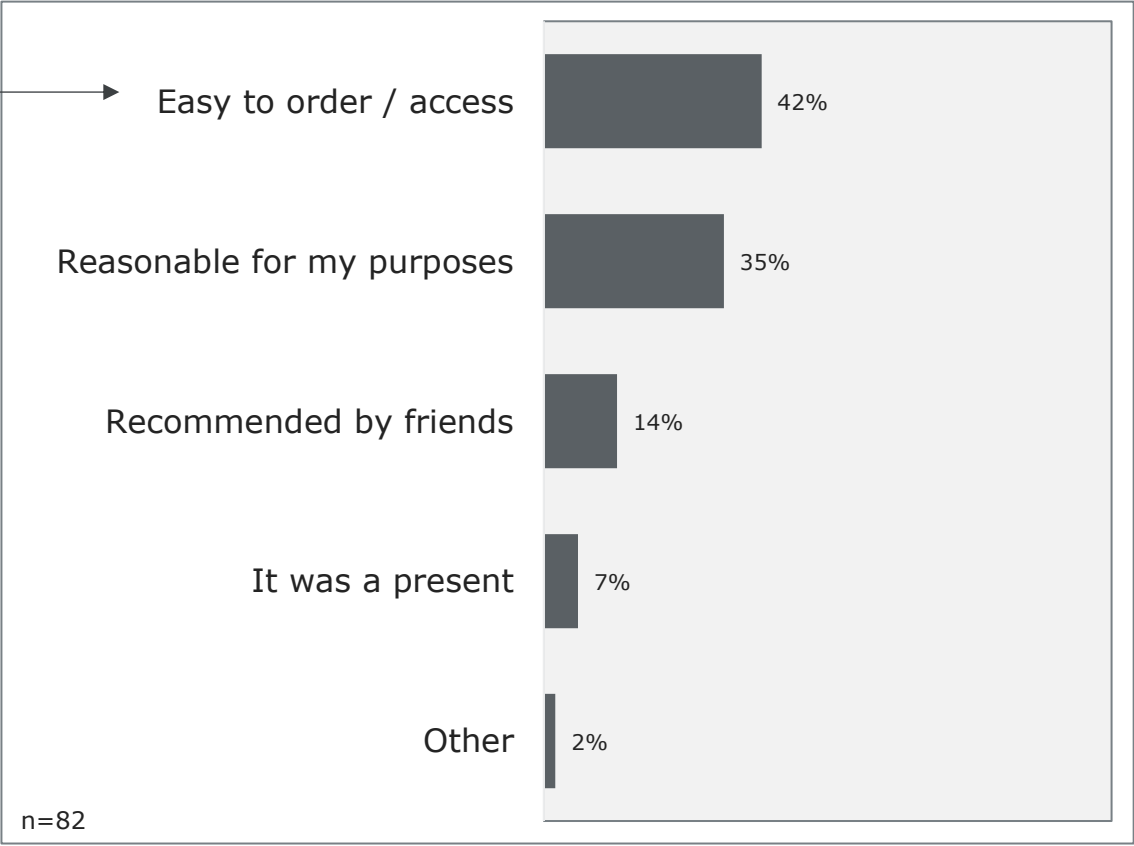


19% report having a PSAP — convenience and adequacy are their main reasons for choosing PSAP/OTC

Would you classify your hearing aid as a...



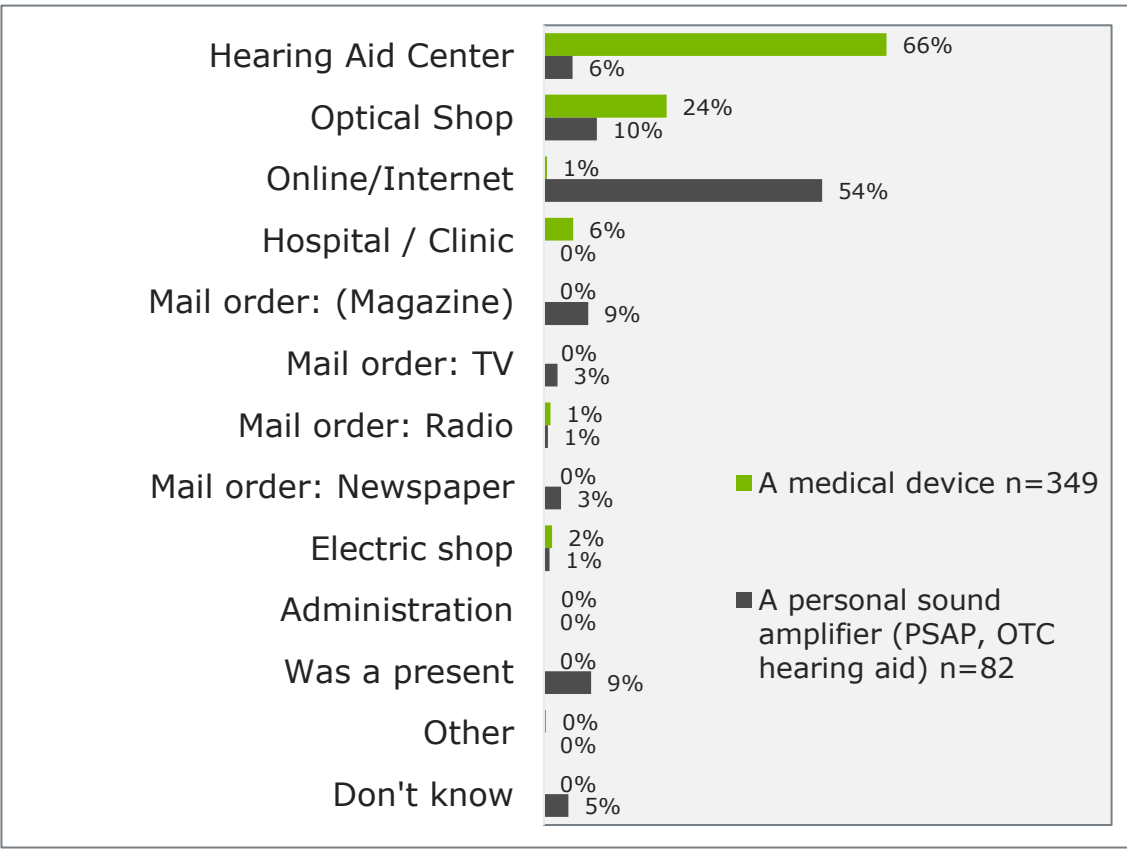
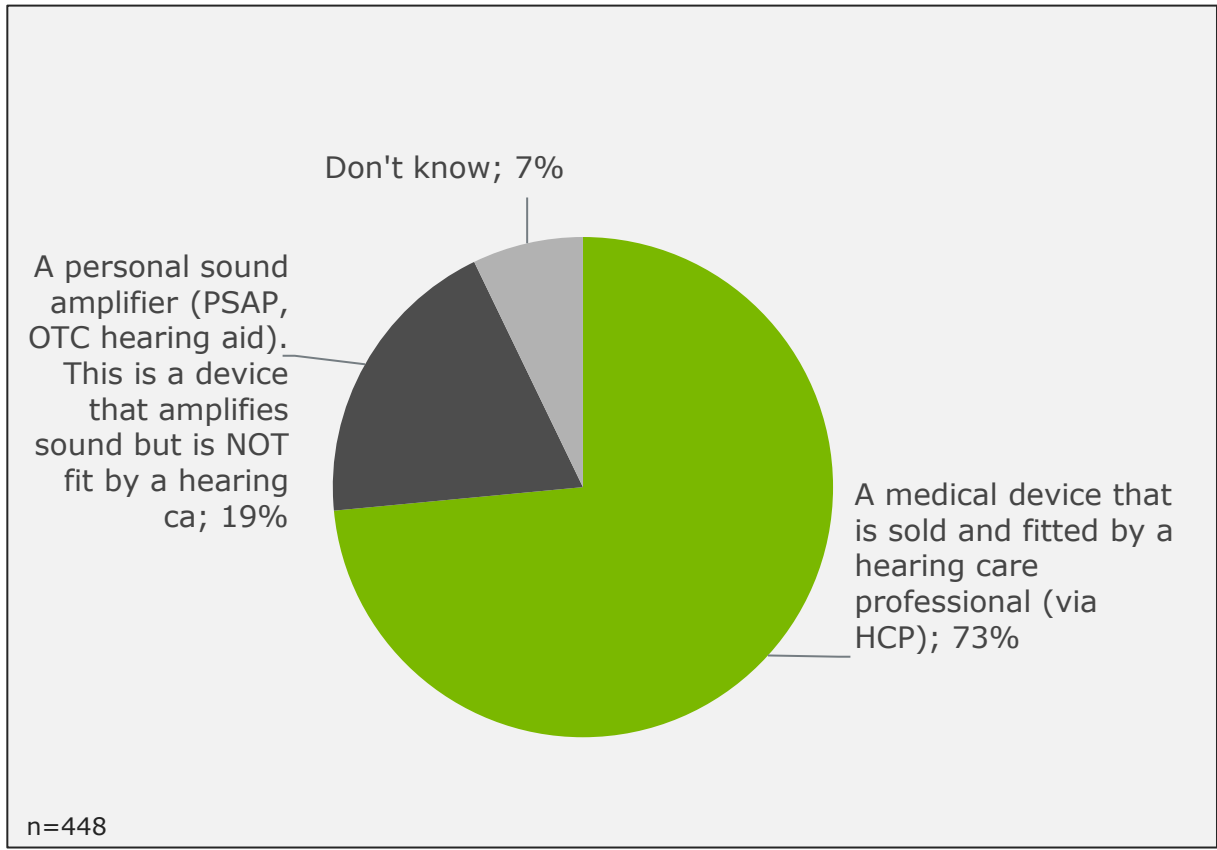
IF PSAP: Why did you buy a personal sound amplifier (PSAP, OTC hearing aid) instead of a medical device sold and fitted by a hearing care professional?



Most medical devices were sold at a hearing aid center, PSAP's/OTC are sold online

Would you classify your hearing aid as a...

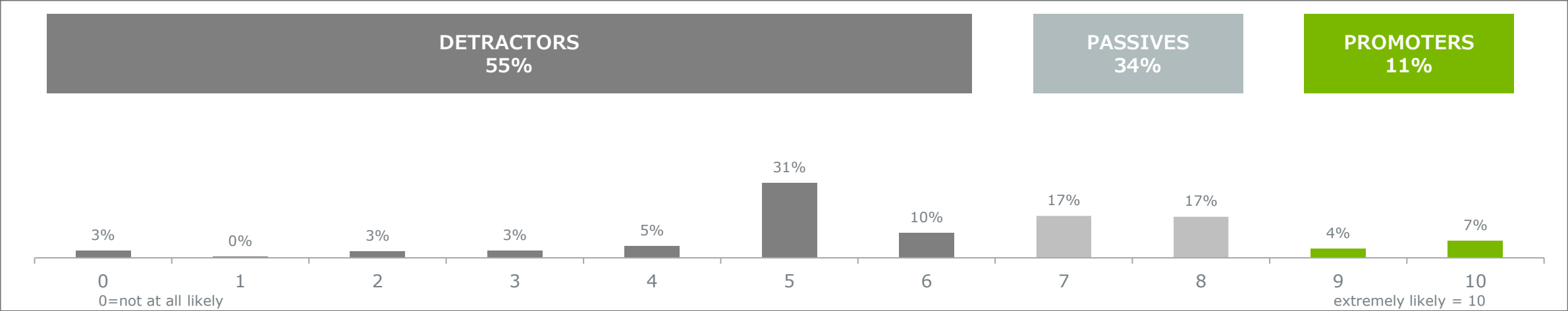
HA Owner:
Where was your most current hearing aid obtained?





Recommendation intention of the place where the hearing aid(s) have been obtained: NPS score of -44

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



NPS = PROMOTERS – DETRACTORS = -44 (2022: -65) (exact figure rounded)

NPS by groups

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

By type of device

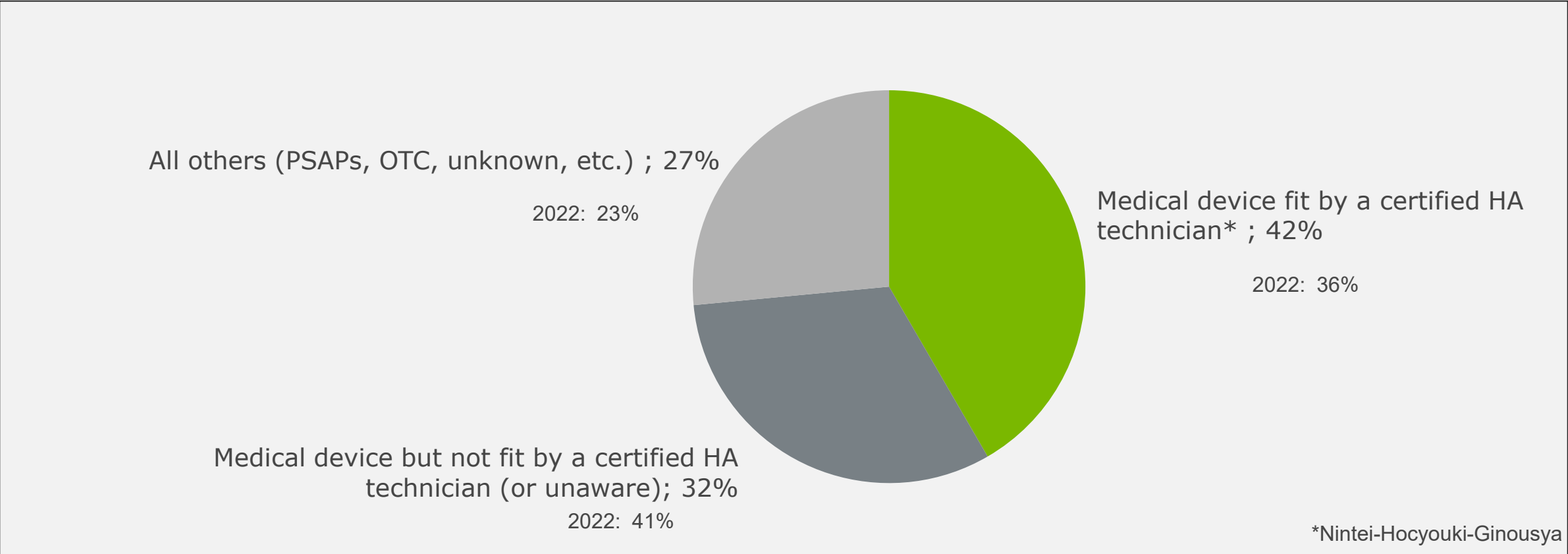
DETRACTORS	PASSIVES	PROMOTERS	NPS = PROMOTERS - DETRACTORS
Medical device fit by a certified HA technician n=208: 47%	34%	19%	-29
Medical device but not fit by a certified HA technician) n=141: 56%	40%	4%	-52
Other (PSAP's, unaware, etc) n=99: 73%	20%	8%	-65

By channel

DETRACTORS	PASSIVES	PROMOTERS	NPS = PROMOTERS - DETRACTORS
Hearing aid centers n=240: 44%	39%	17%	-27
Optical Shop n=86: 65%	30%	4%	-61
Online/Internet n=55: 75%	24%	1%	-74

Categorization of hearing aids

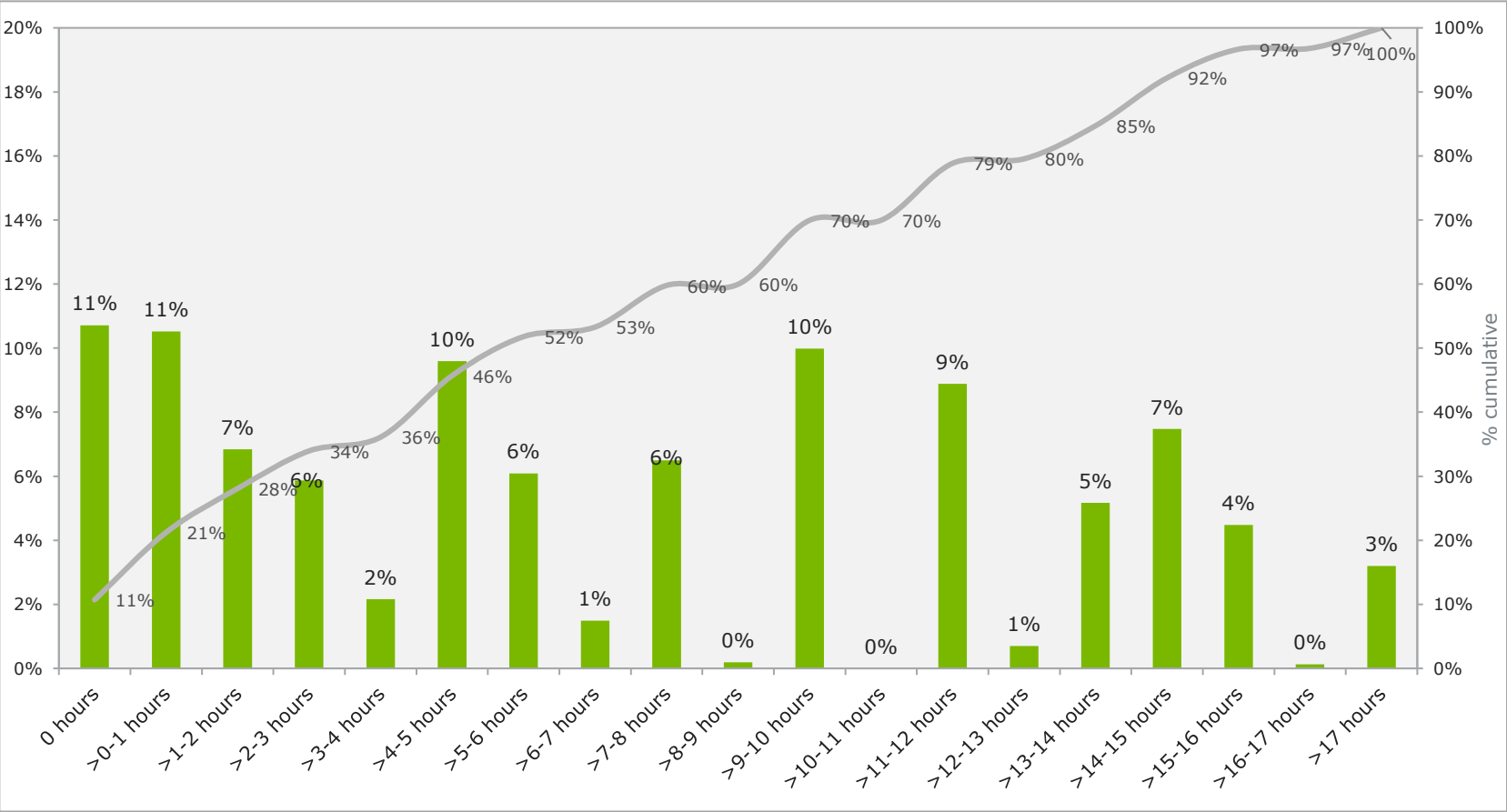
- Categorization created by two questions:
- Has Nintei-Hocyouki-Ginousya (certified HA technician) consulted and fitted your hearing aid when you bought it?
 - Would you classify your hearing aid as a...
 - A medical device that is sold and fitted by a hearing care professional
 - A personal sound amplifier (PSAP, OTC hearing aid). This is a device that amplifies sound but is NOT fit by a hearing care professional.





On average, HAs are worn 7.3 hours a day

How many hours a day are HA worn?



HA worn:
2025 Mean: 7.3 hours/day
2022 Mean: 6.5 hours/day

In the drawer (0 hours):
2025: 11%
2022: 12%



Country specific question(s) / analysis

By type of device:

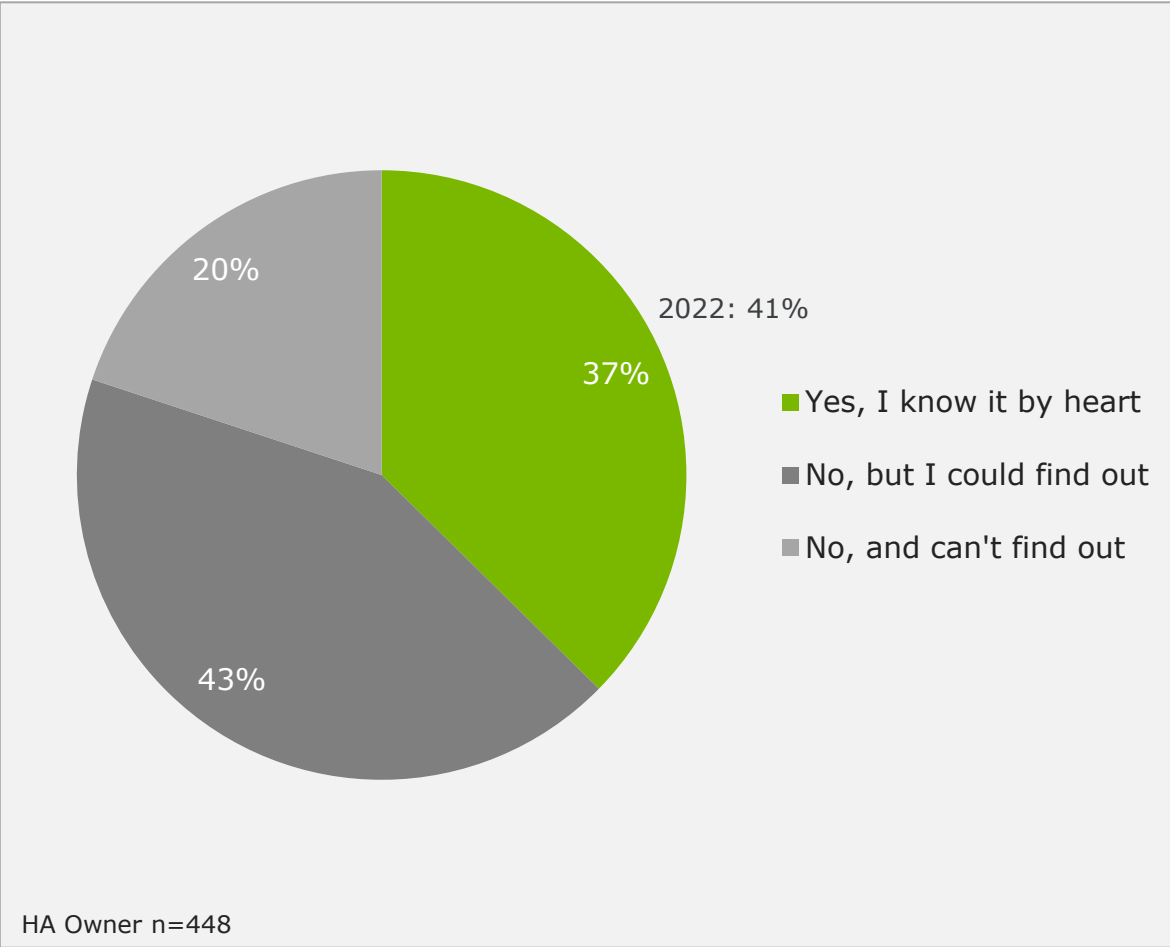
HA worn hours/day:	
Medical device fit by a certified HA technician:	8.3
Med. device not fit by a cert. technician /unaware:	8.9
All others (PSAPs, OTC, unknown, etc.) :	3.8

In the drawer (0 hours):	
Medical device fit by a certified HA technician:	3%
Med. device not fit by a cert. technician /unaware:	3%
All others (PSAPs, OTC, unknown, etc.) :	33%



37% of today's hearing aid owners are aware of their hearing aid brand

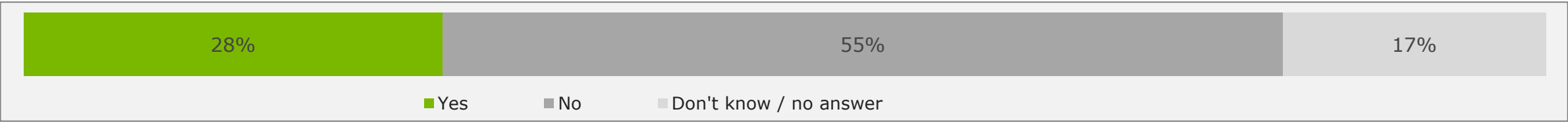
Are you aware of the brand of your hearing aid(s)?





22% of the HA owners use a hearing aid app, and 72% are satisfied with it

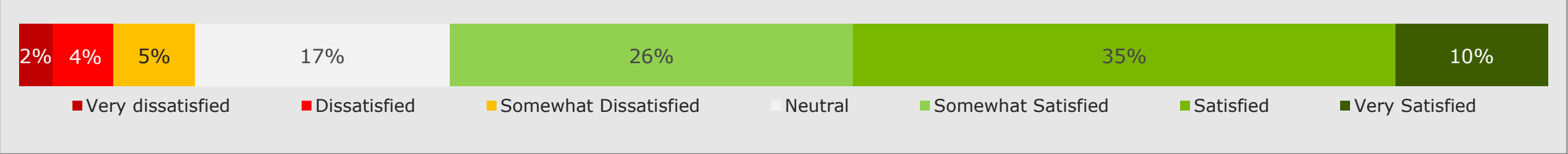
Have you been informed by your hearing care professional about hearing aid apps?
(HA Owner n=448)



Do you personally use apps for your hearing aids?
(HA Owner n=448)

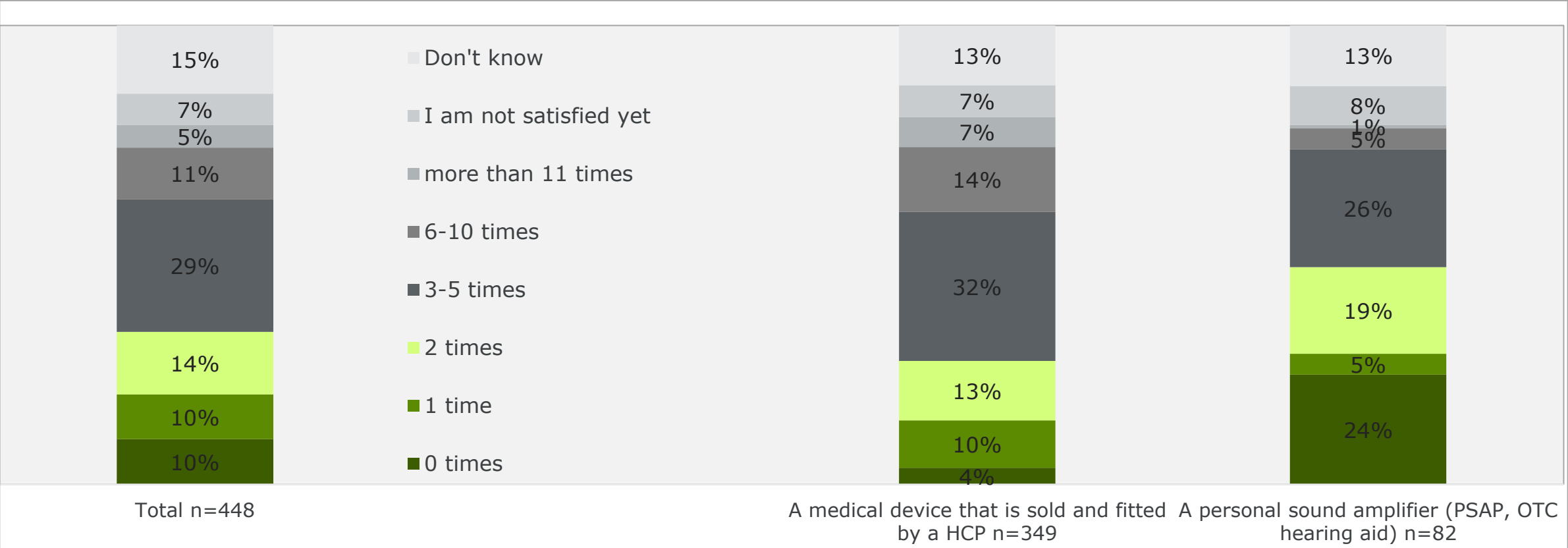


IF APPS USED (n=97):
Overall, how satisfied with the performance of your apps?



Hearing aids need to be refitted about several times

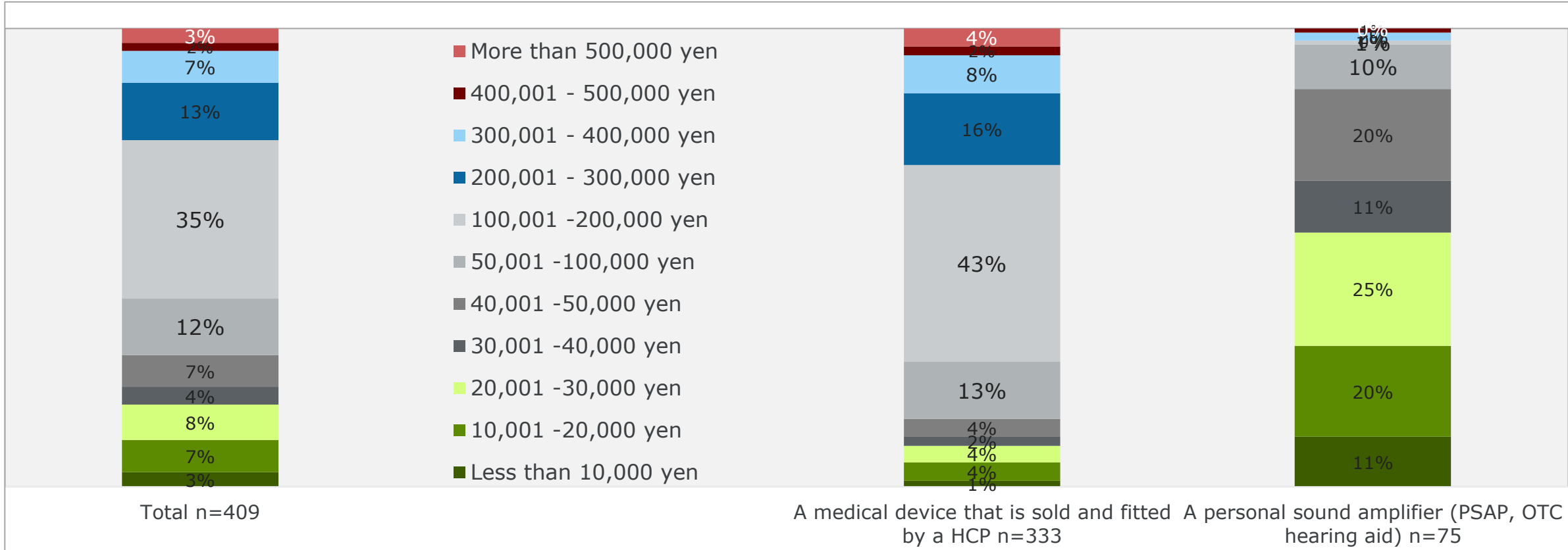
How many times your hearing aid(s) had to be adjusted by a hearing healthcare professional until it was working satisfactorily for you?





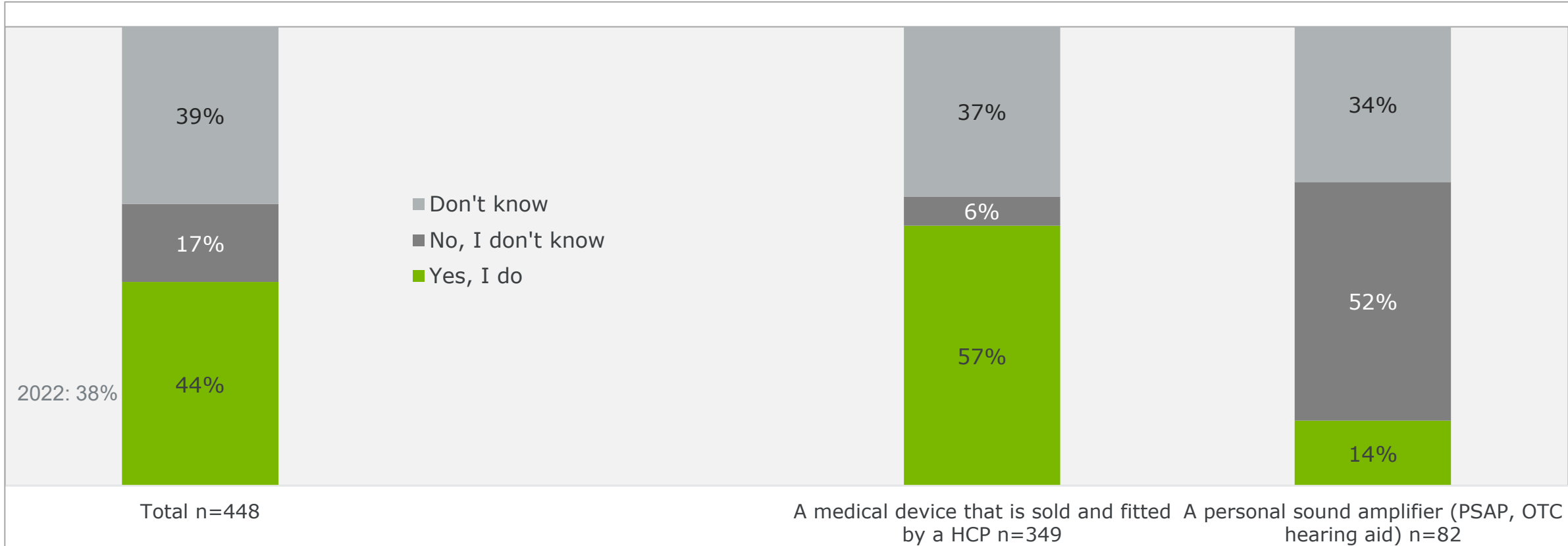
Most hearing aids cost between 100,000 and 300,000 yen — PSAP/OTC devices are much cheaper

How much have you paid for your hearing aids (PER EAR)



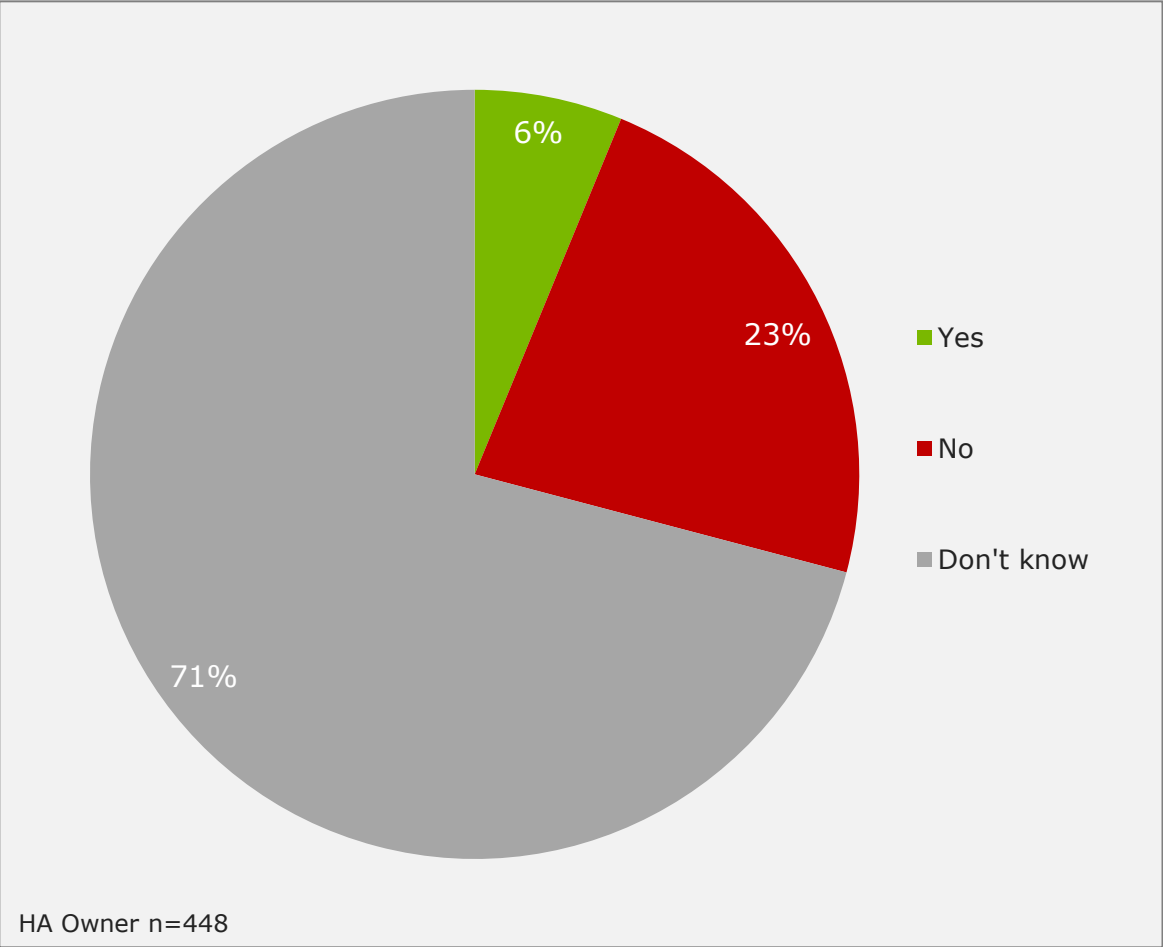
44% are aware that a certified hearing aid technician fitted the hearing aids

Has Nintei-Hocyouki-Ginousya (certified HA technician) consulted and fitted your hearing aid when you bought it?



6% of HAs are (to the owners' knowledge) equipped with Telecoil

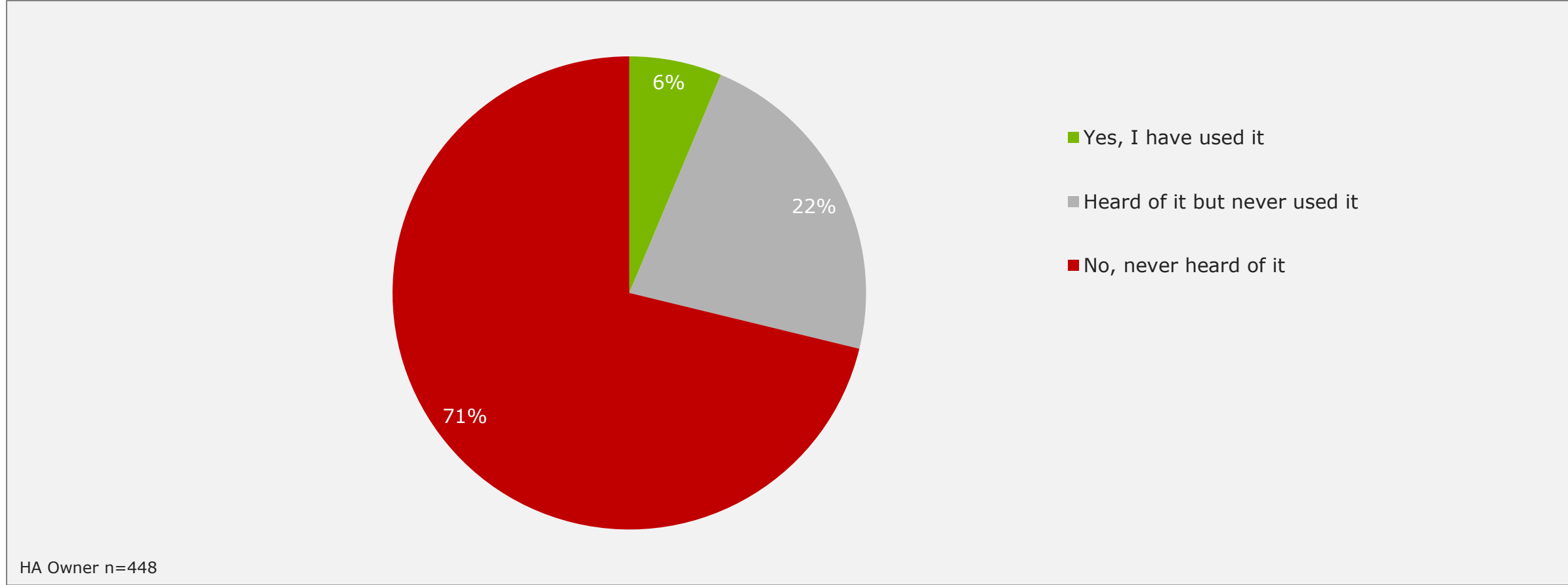
Are your hearing aids equipped with Telecoil?





6% of the HA owners have already used remote fitting, 22% have at least heard of it, and 71% have never heard of it

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



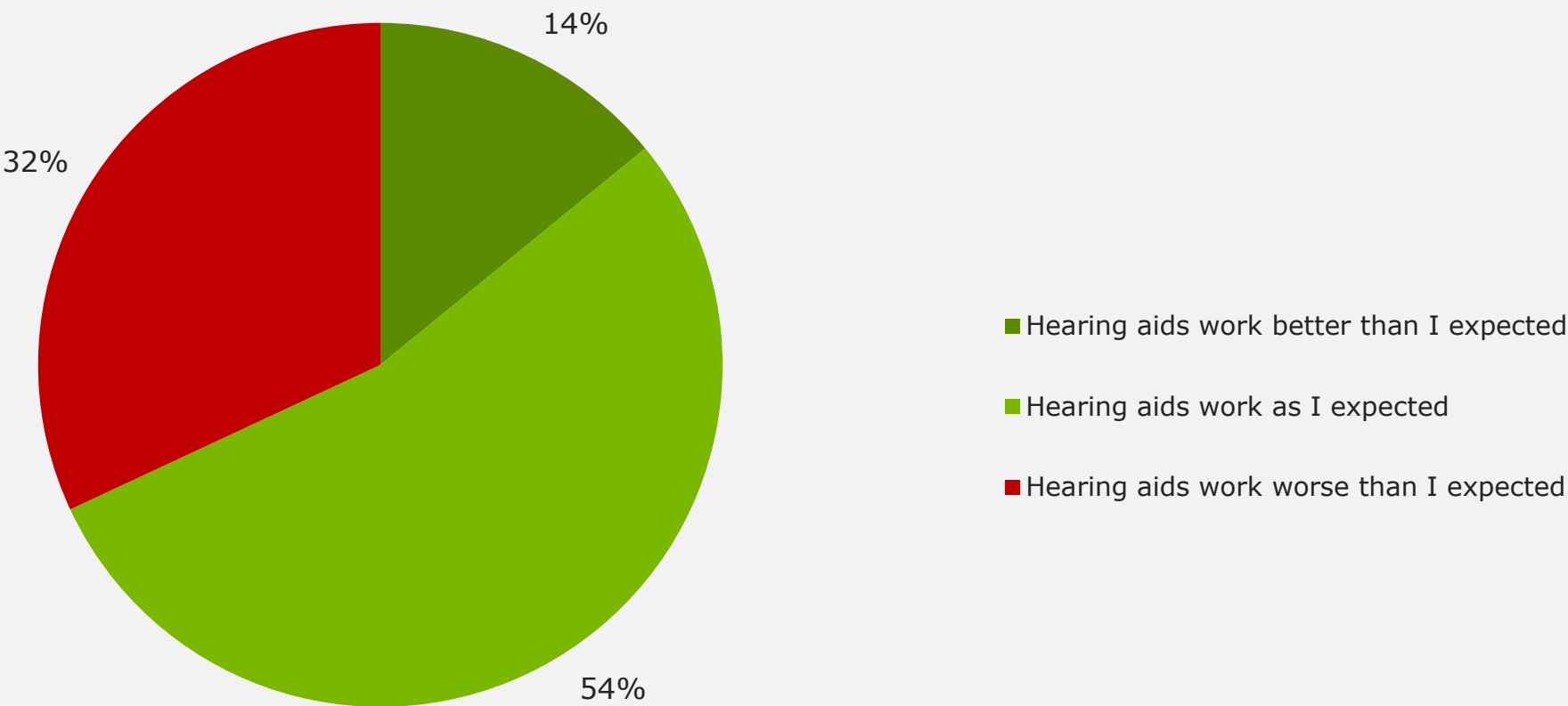


Satisfaction with hearing aids and drivers, Importance of listening situations



68% of 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?

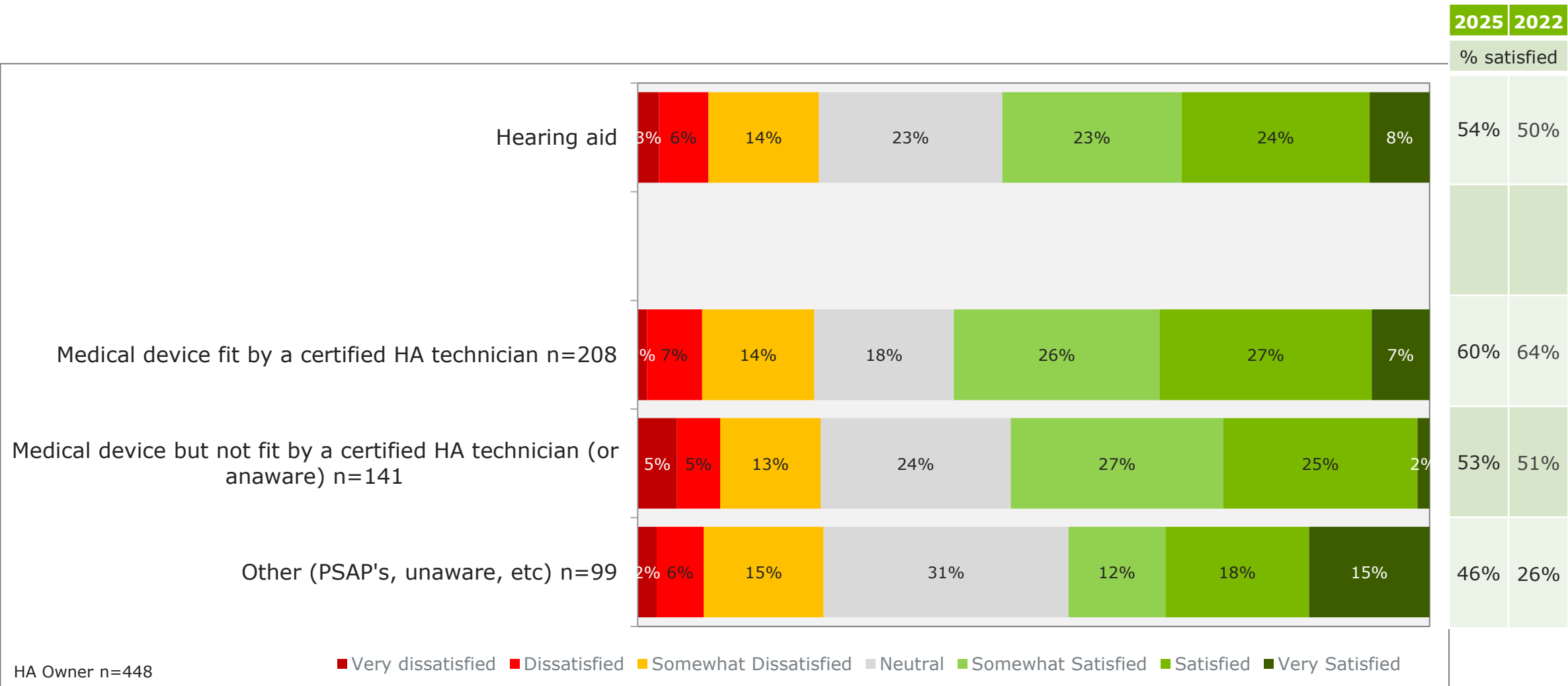


HA Owner n=448



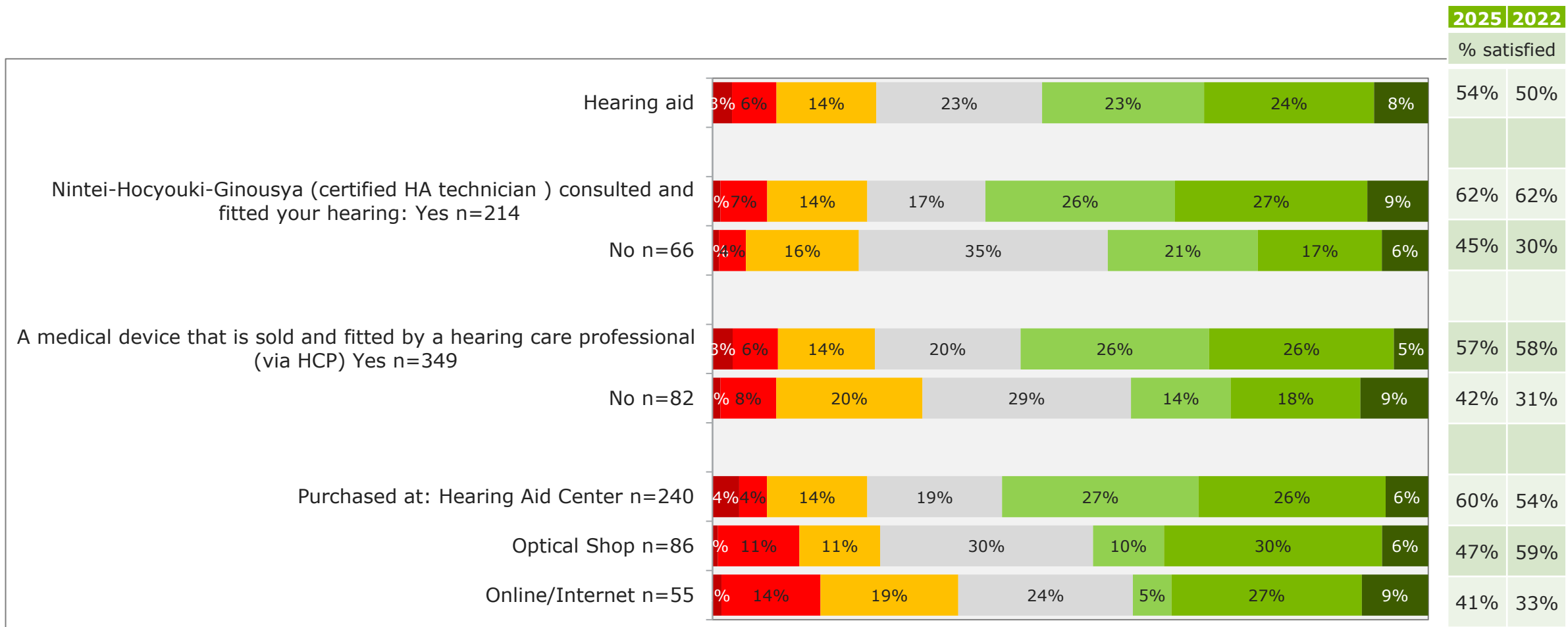


Overall satisfaction with HA: 54% of hearing aid owners are satisfied with their hearing aid(s)





Overall satisfaction with HA: 54% of hearing aid owners are satisfied with their hearing aid(s)



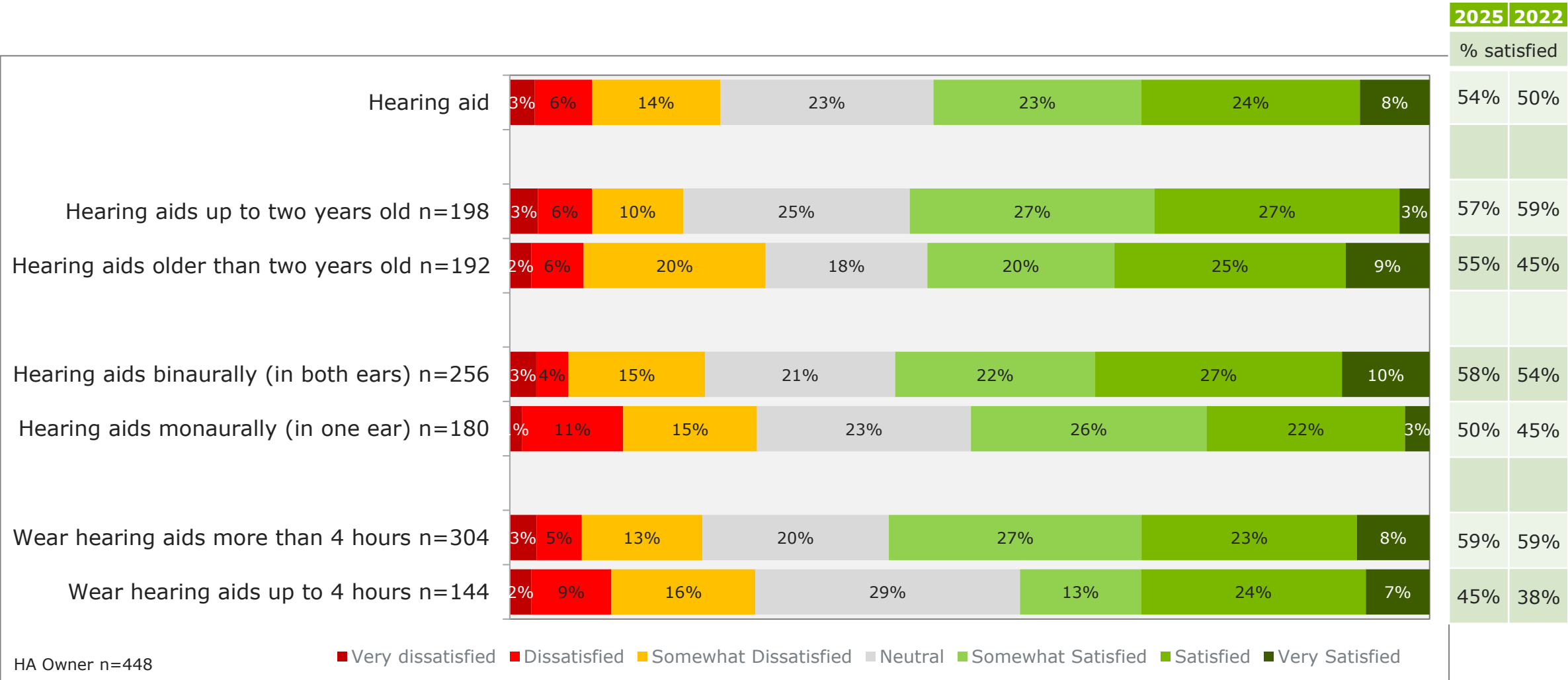
HA Owner n=448

Very dissatisfied Dissatisfied Somewhat Dissatisfied Neutral Somewhat Satisfied Satisfied Very Satisfied





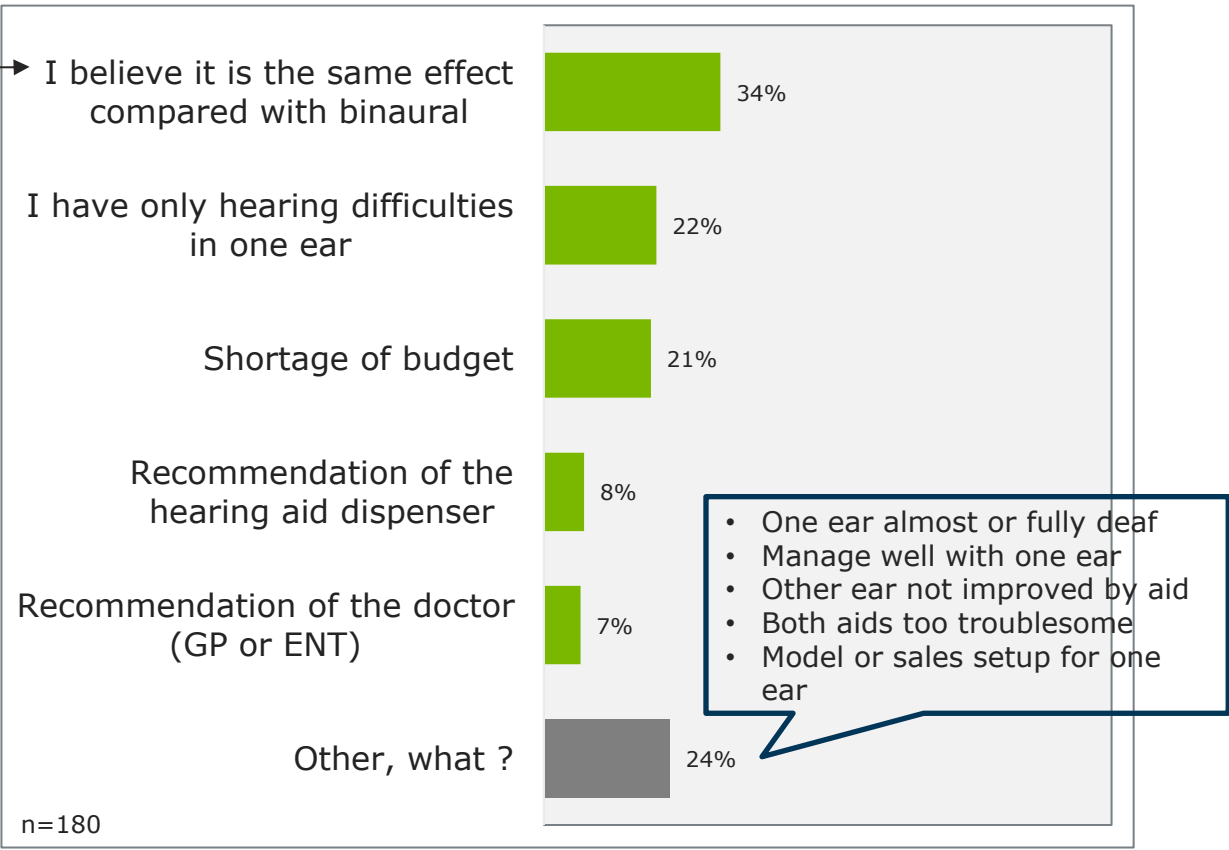
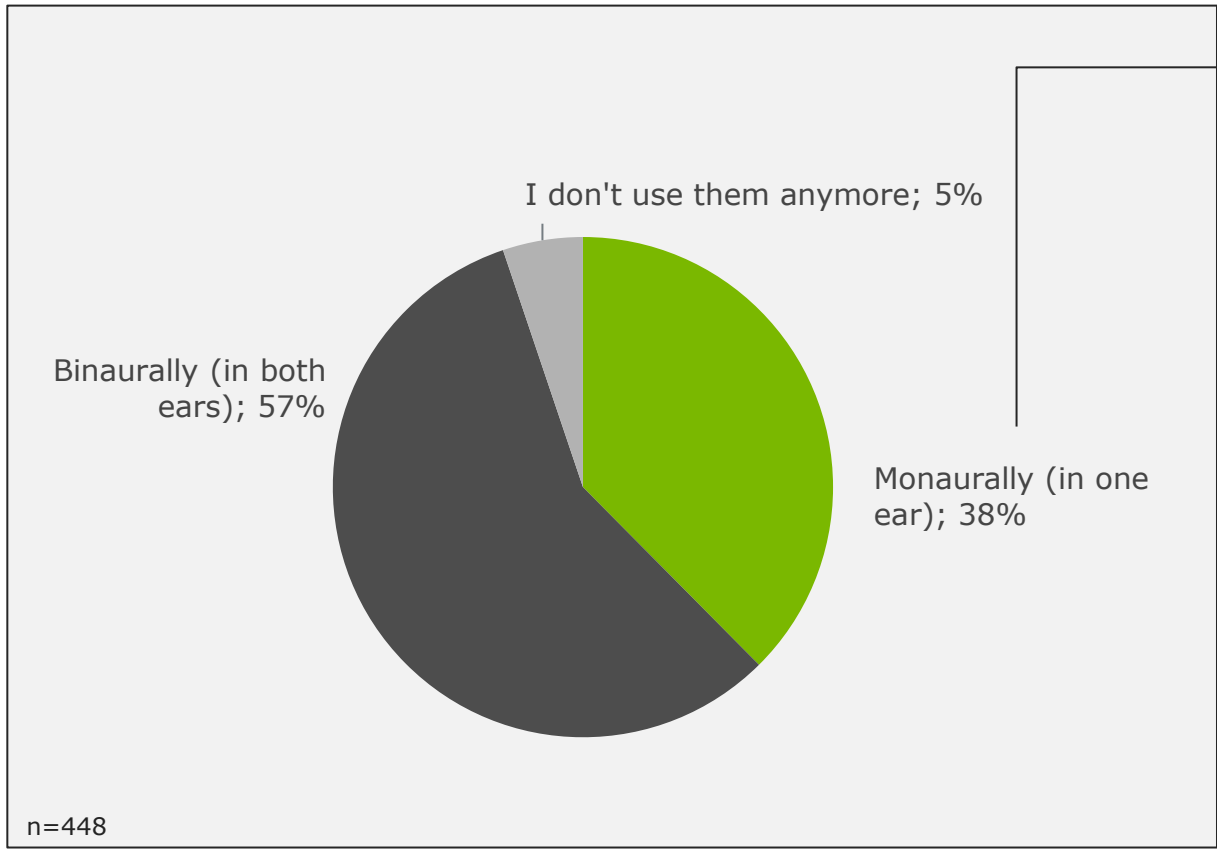
Overall satisfaction with HA: 54% of hearing aid owners are satisfied with their hearing aid(s)



People with one hearing aid tend to believe it works as well as two

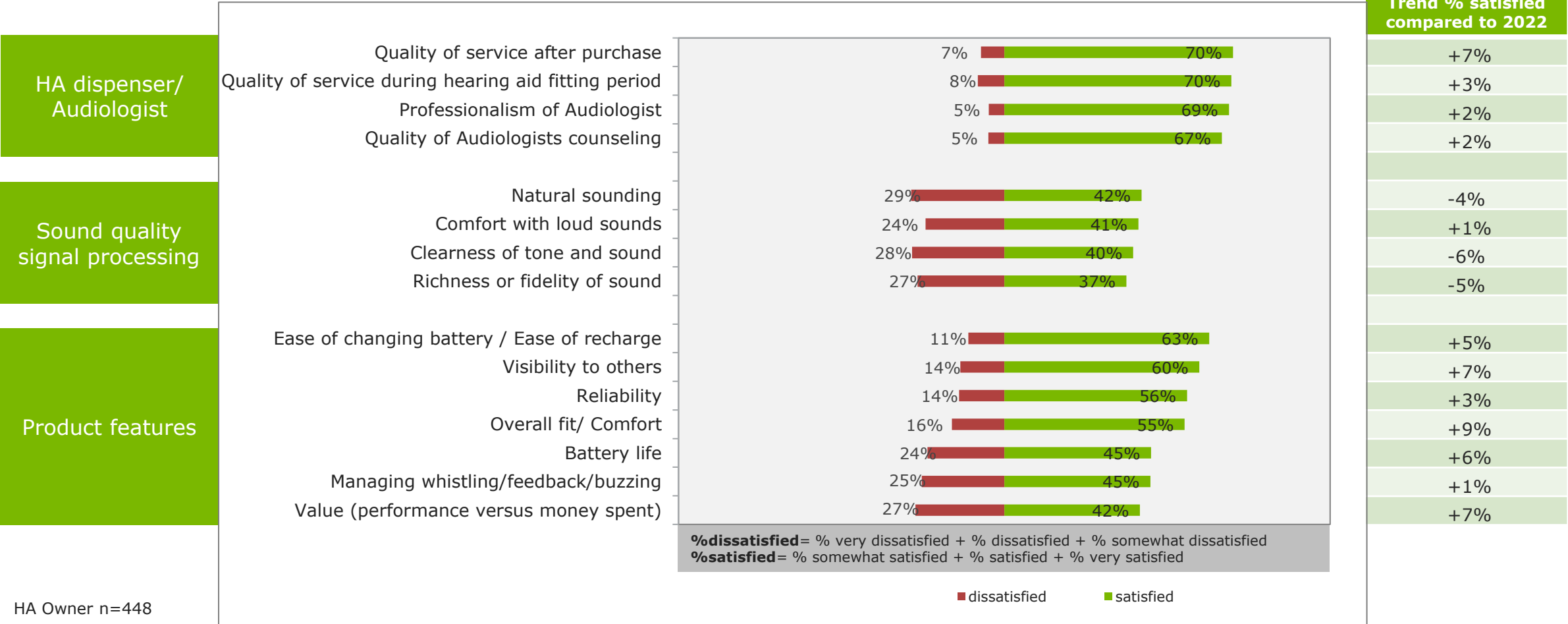
Do you wear hearing aids monaurally or binaurally?

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





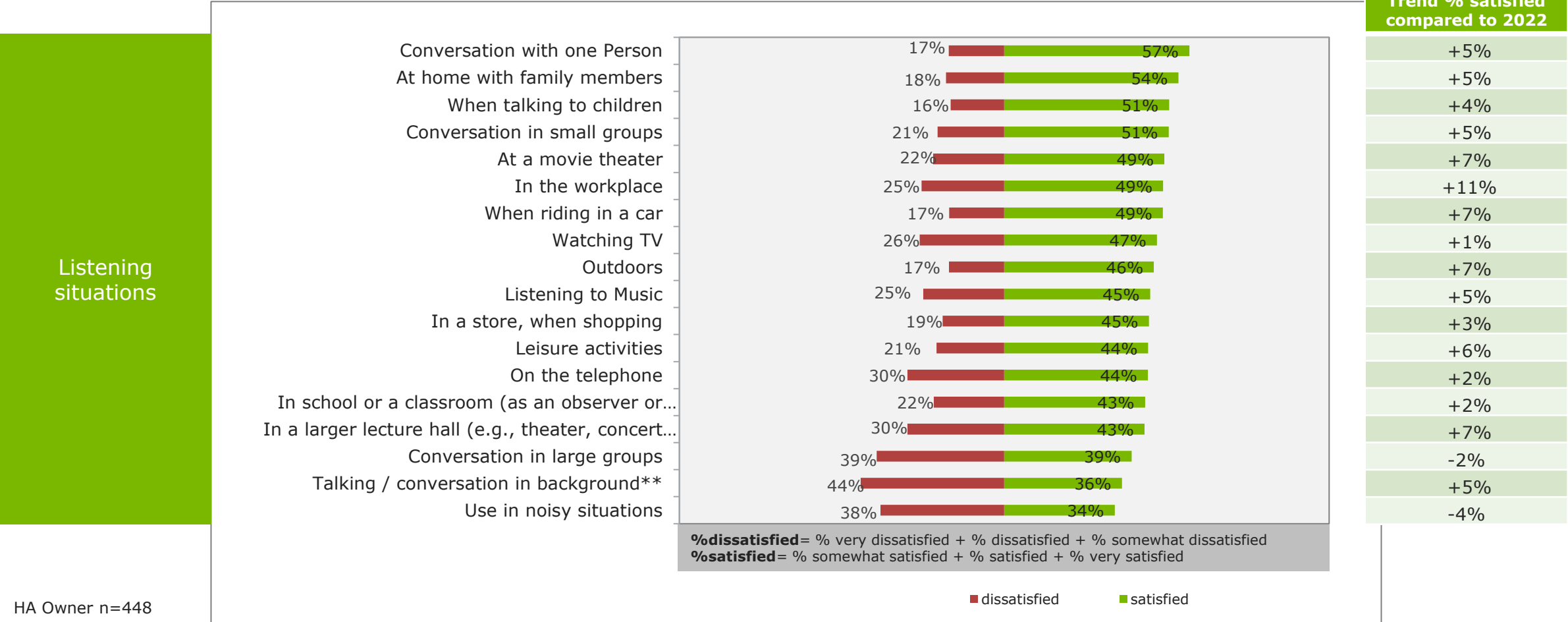
Satisfaction with current hearing aids



HA Owner n=448



Satisfaction with current hearing aids



HA Owner n=448

The factors that most influence satisfaction with current hearing aids are reliability, sound quality, and signal processing

		Influence on overall satisfaction with HA*
HA dispenser / Audiologist	Quality of service during hearing aid fitting period	.61
	Professionalism of Hearing aid dispenser / Audiologist	.60
	Quality of Hearing aid dispenser's / Audiologist's counseling	.58
	Quality of service after purchase	.52
Sound quality signal processing	Clearness of tone and sound	.78
	Richness or fidelity of sound	.78
	Natural sounding	.78
	Comfort with loud sounds	.71
Product features	Reliability	.76
	Overall fit/ Comfort	.69
	Value (performance versus money spent)	.67
	Managing whistling/feedback/buzzing	.60
	Ease of changing battery / Ease of recharge	.46
	Battery life	.43
	Visibility to others	.43

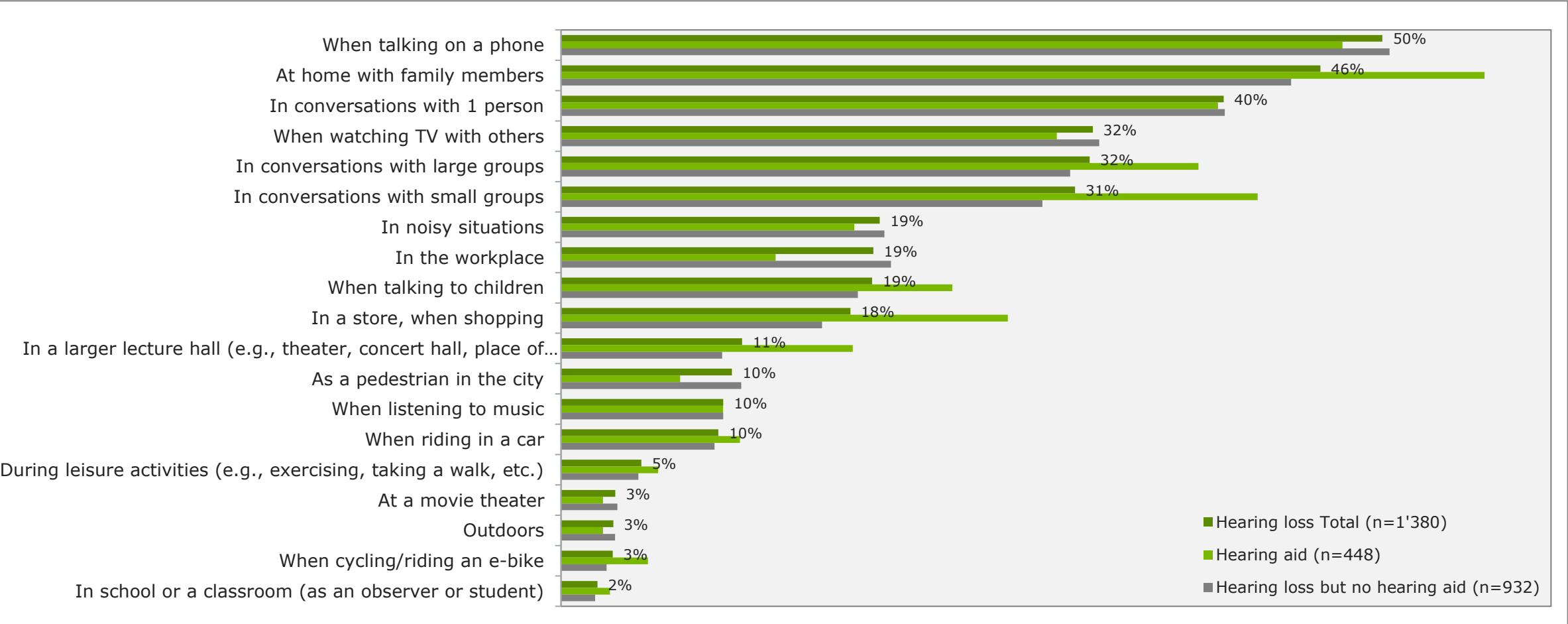
HA Owner n=448

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



The most important listening situations are talking on the phone and communicating with family members

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





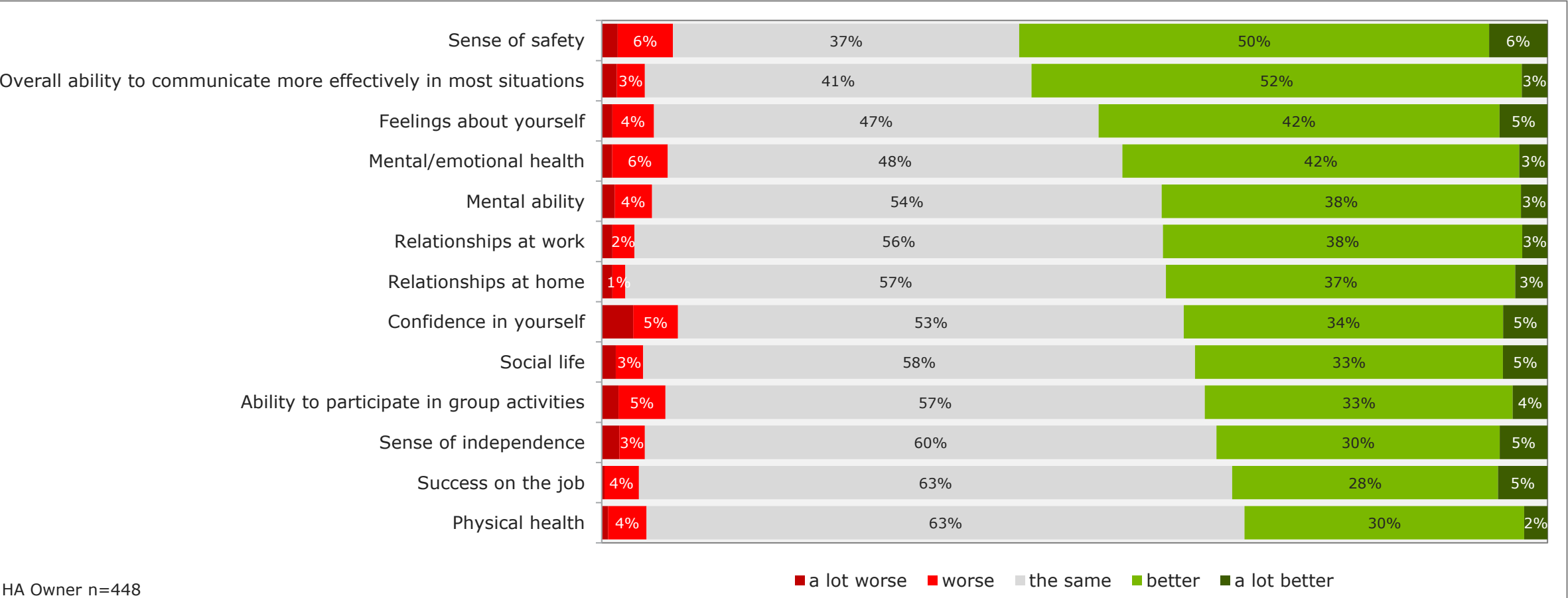
Positive impact of hearing aids, safety due to hearing aids, quality of life





People with hearing aids report significant positive effects – especially on their sense of safety, ability to communicate more effectively, and how they feel about themselves

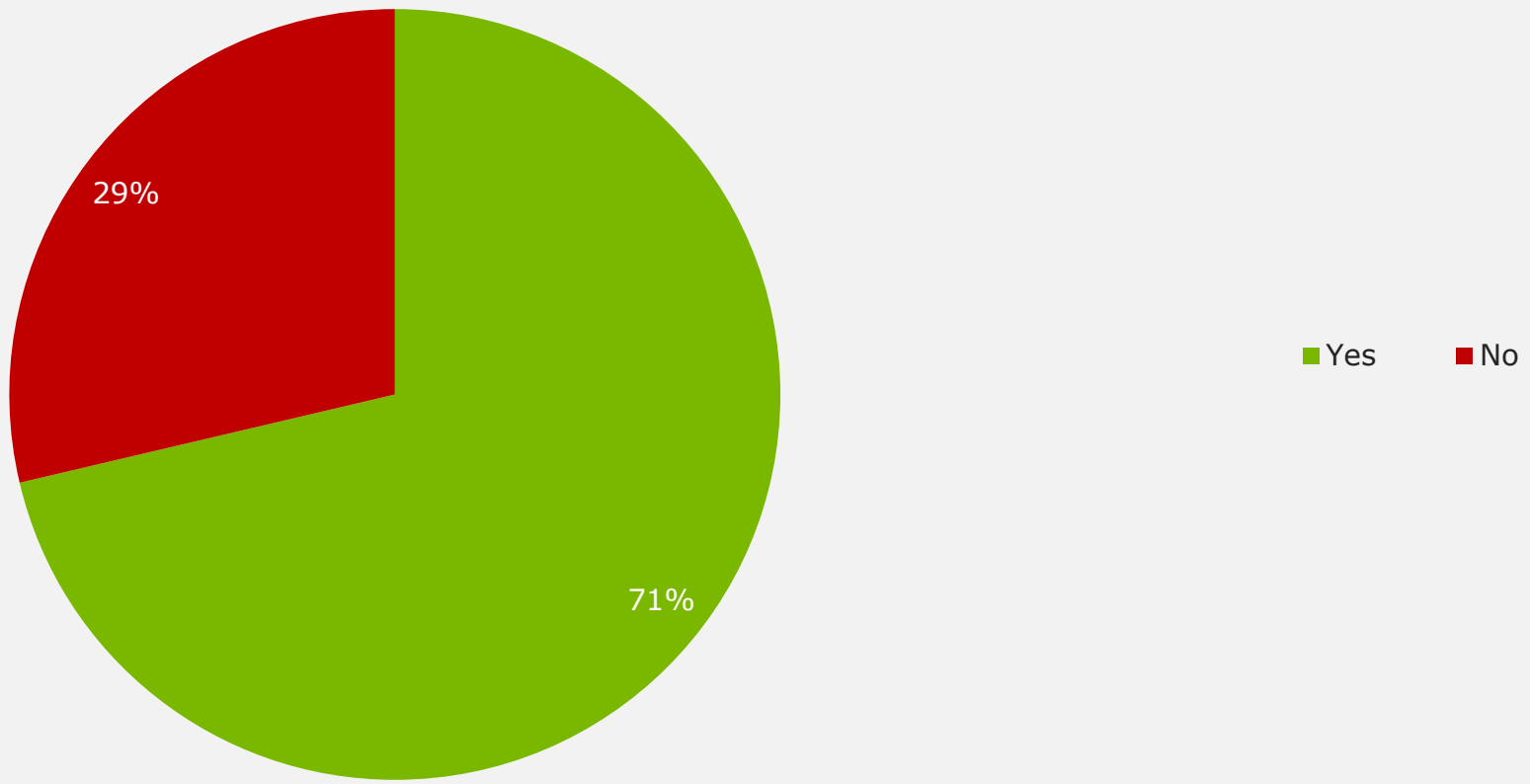
Since you started using your hearing aid(s), please rate the changes you have experienced in each of the following areas, that you believe are due to your hearing aid(s).



HA Owner n=448

71% of hearing aid owners feel more confident moving in a city since wearing hearing aids

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



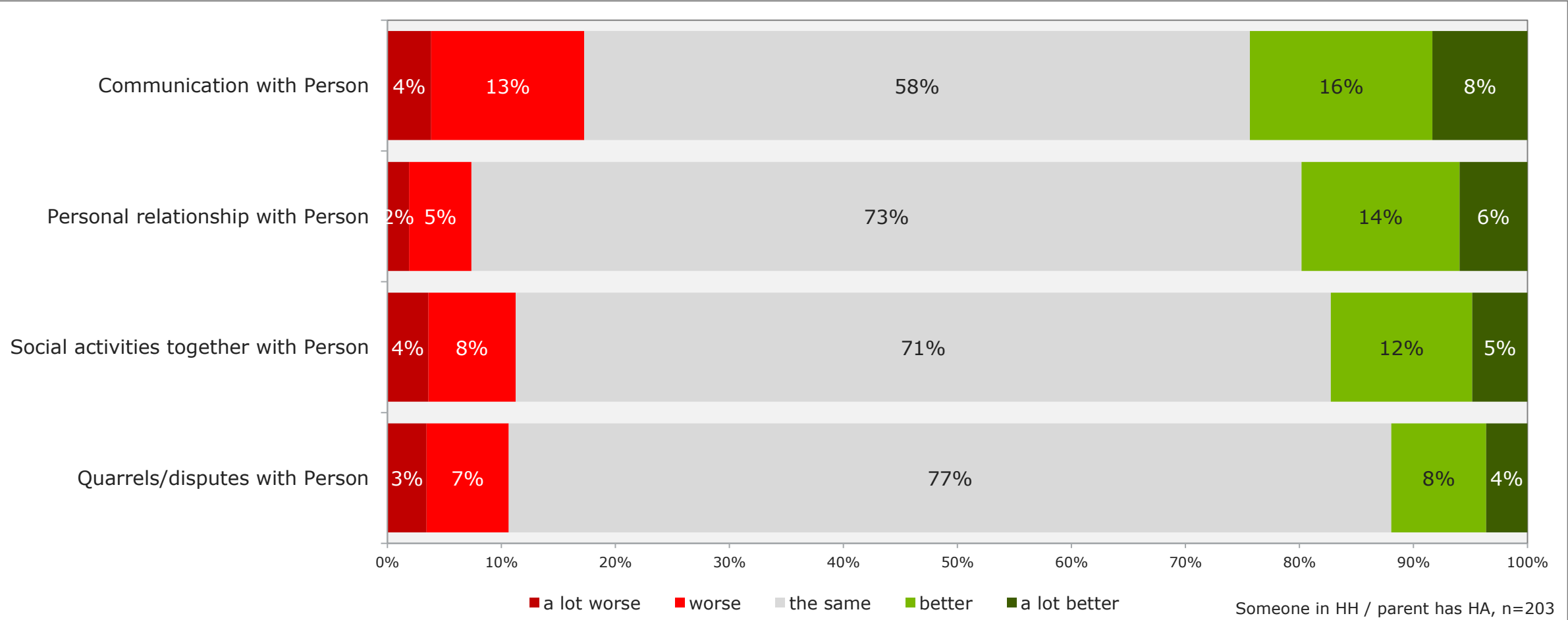
HA Owner n=448





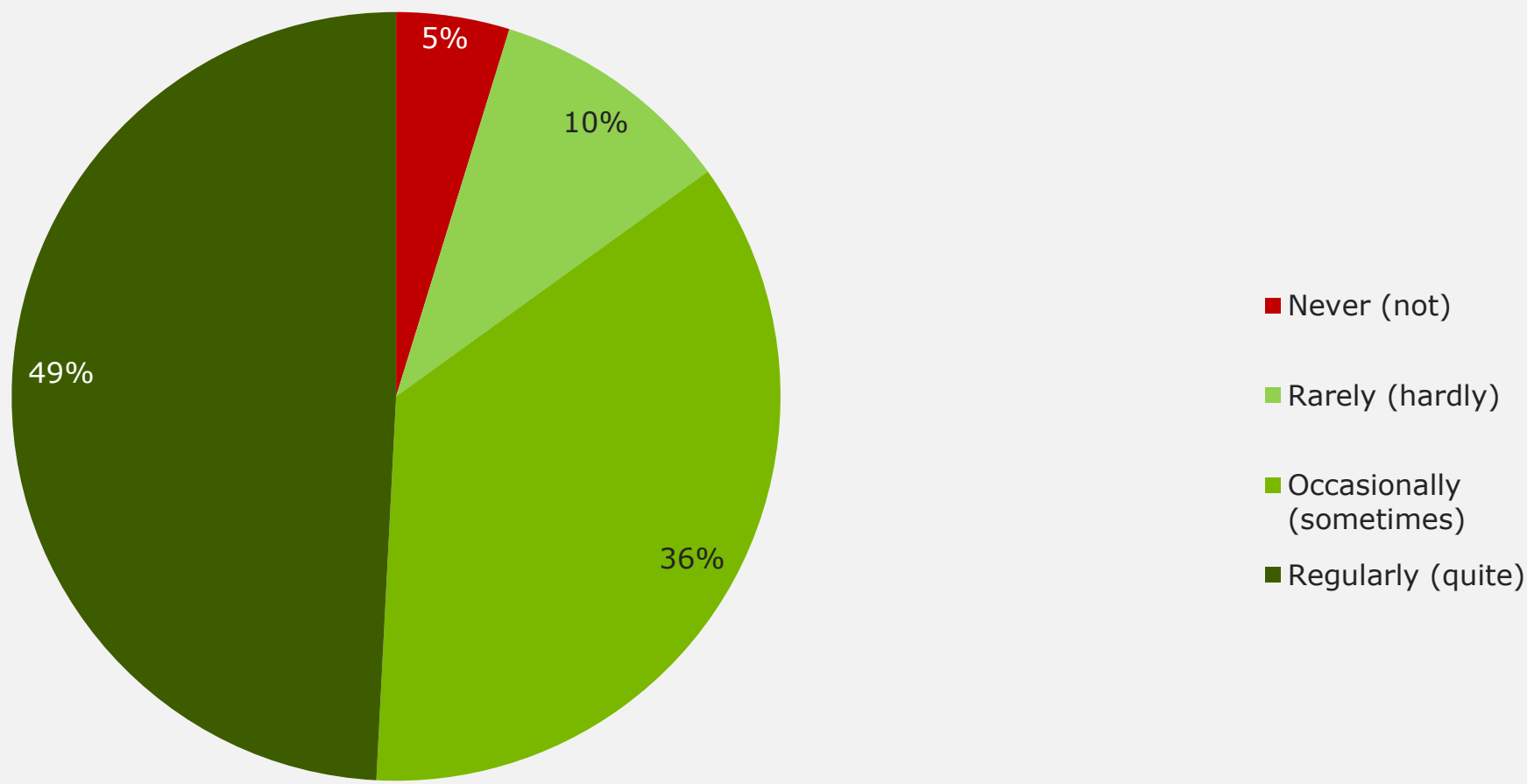
When someone with hearing loss wears hearing aids, it also improves the situation for others in the household

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



95% 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?



HA Owner n=448





4. Analysis of hearing impaired non-owners





To analyze reasons for non-adoption, we will examine the top 50% HL group, as their hearing loss structure is more similar to that of HA owners

Hearing loss characteristics: Owners compared to Non-owners

	HA Owner n=448	HA Non-owner low 50% HL n=349	HA Non-owner Top 50% HL n=254
Ears impaired (stated)			
Unilateral loss	24%	42%	25%
Bilateral loss	76%	58%	75%
Perceived loss			
Mild	31%	66%	34%
Moderate	55%	33%	57%
Severe	11%	1%	5%
Profound	3%	0%	4%

More similar hearing loss-structure



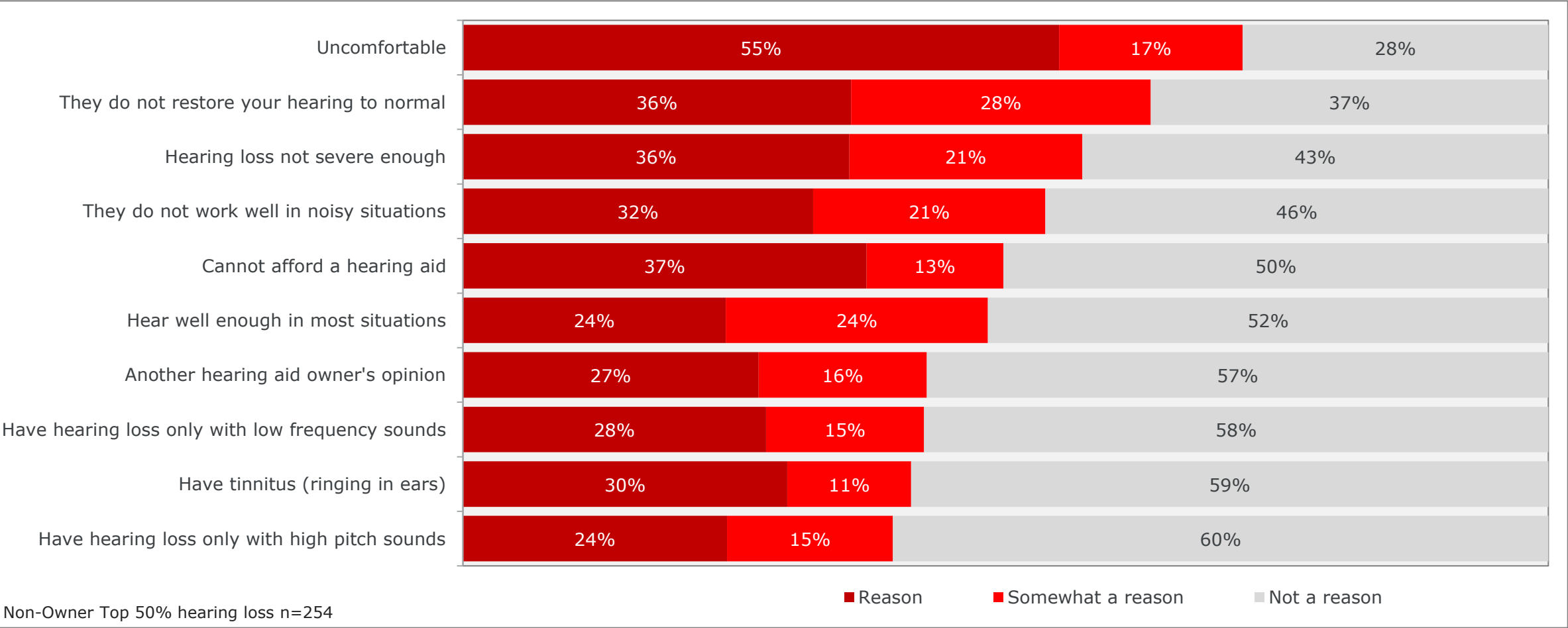


Reasons for not having hearing aids



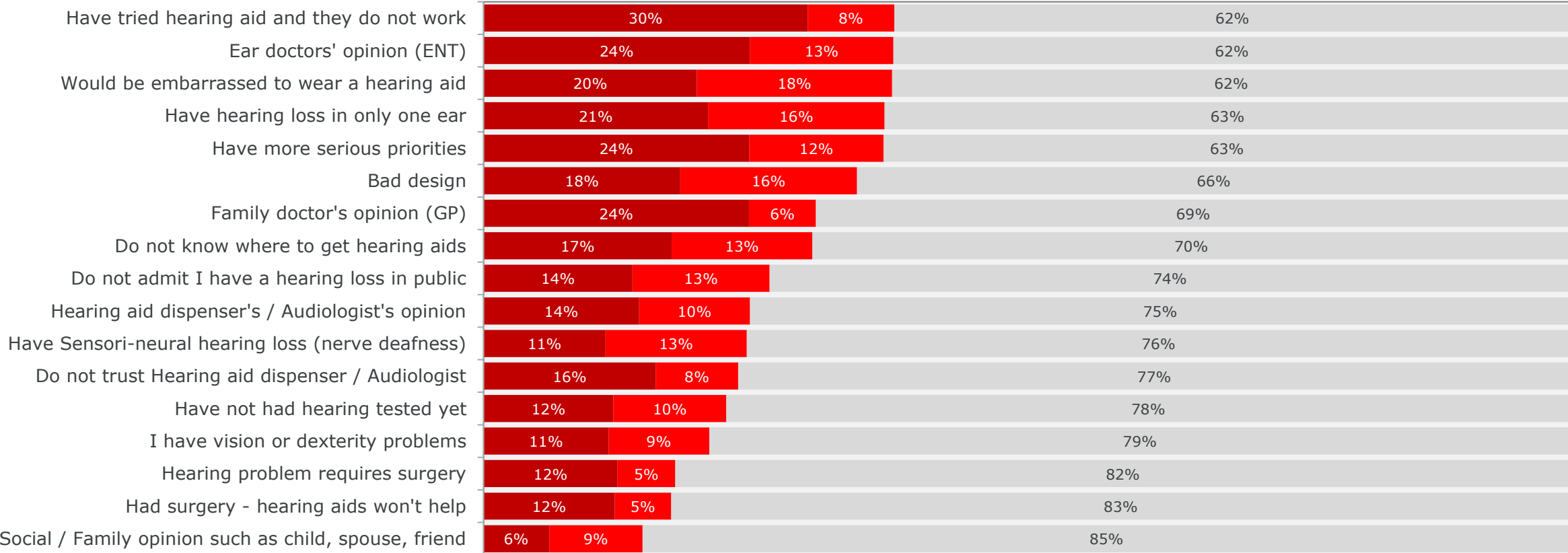


Top 10 reasons for not having a hearing aid





Less important reasons for not having a hearing aid

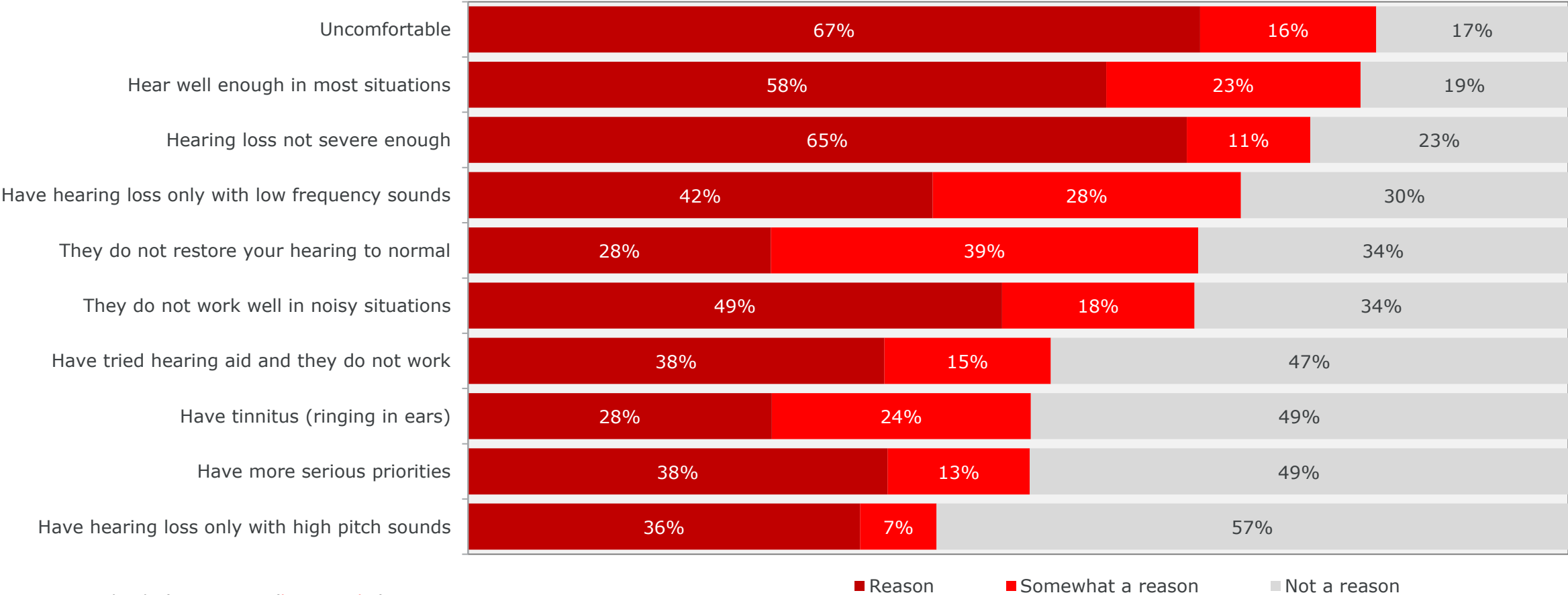


Non-Owner Top 50% hearing loss n=254

■ Reason ■ Somewhat a reason ■ Not a reason



Top 10 reasons for HA owners NOT using them



HA Owners who don't use, n=40 (low sample!)





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

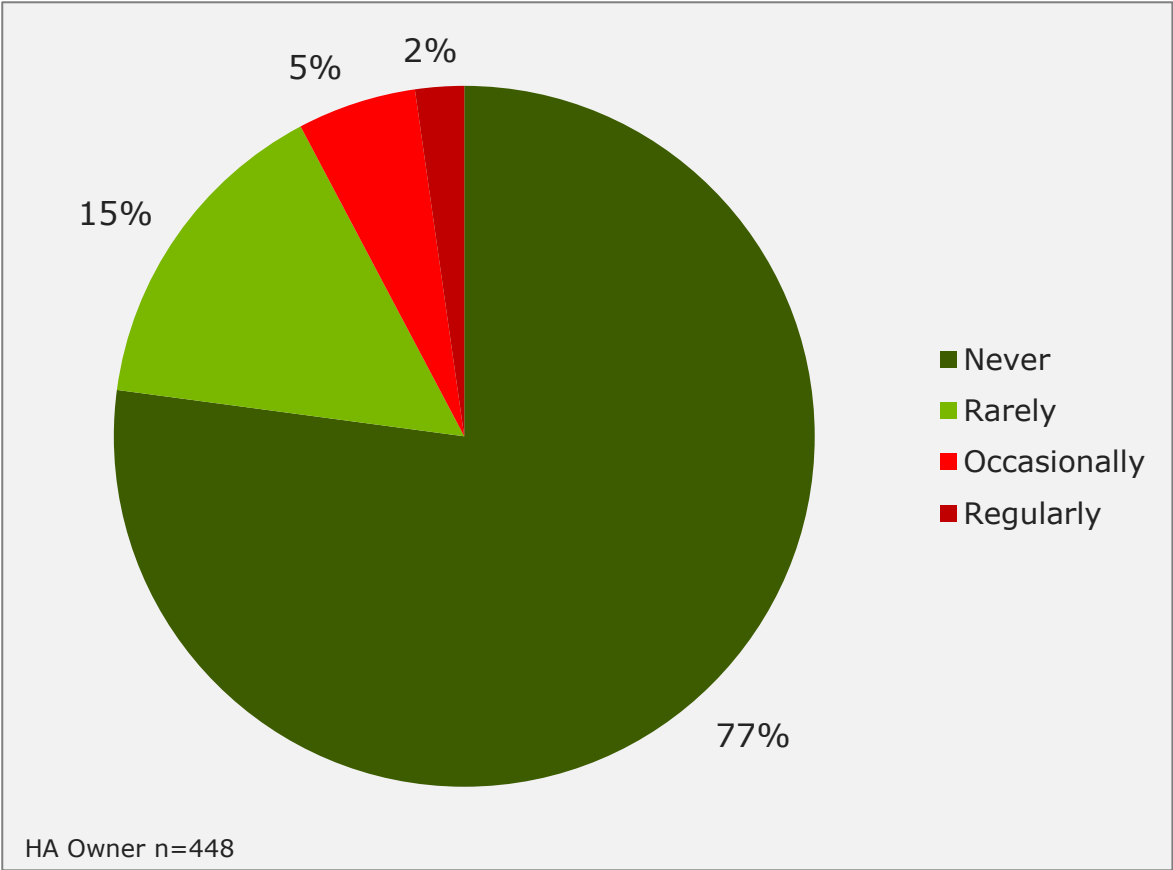




77% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid

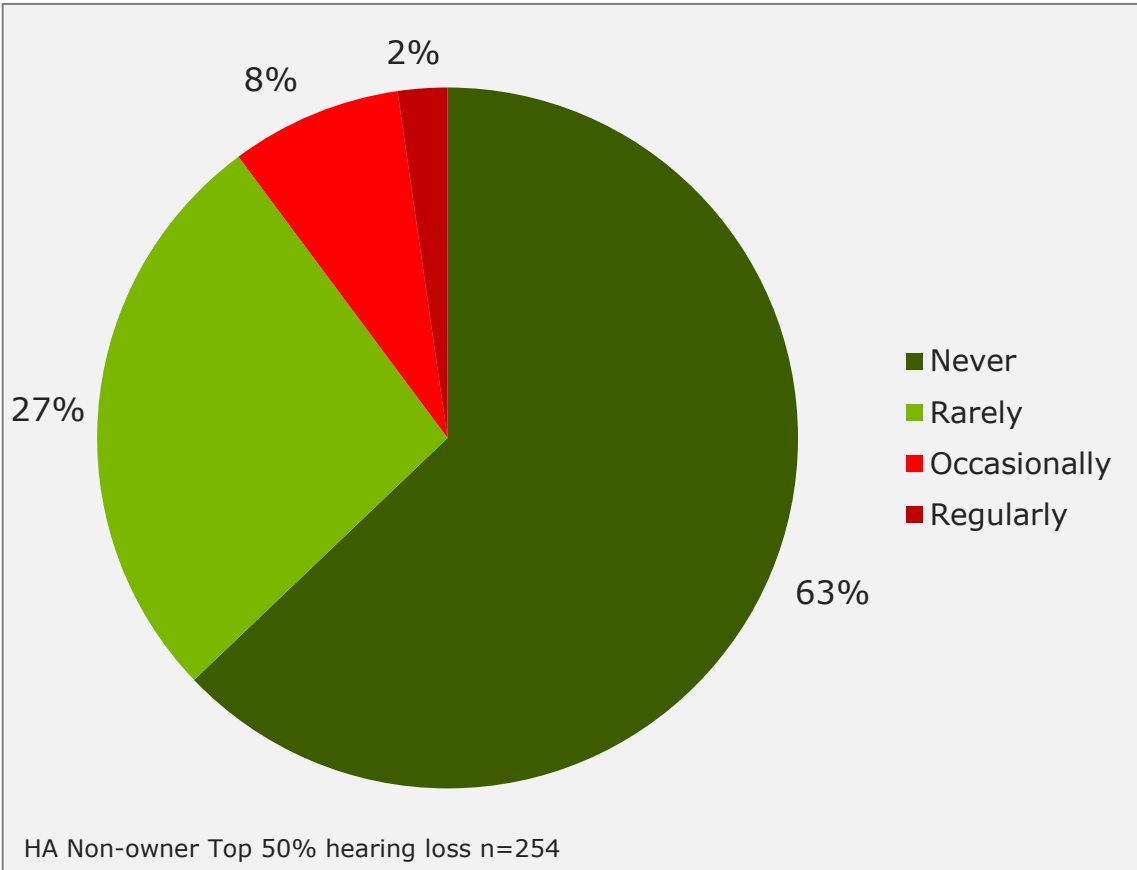
HA Owner:

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



HA Non-owner:

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



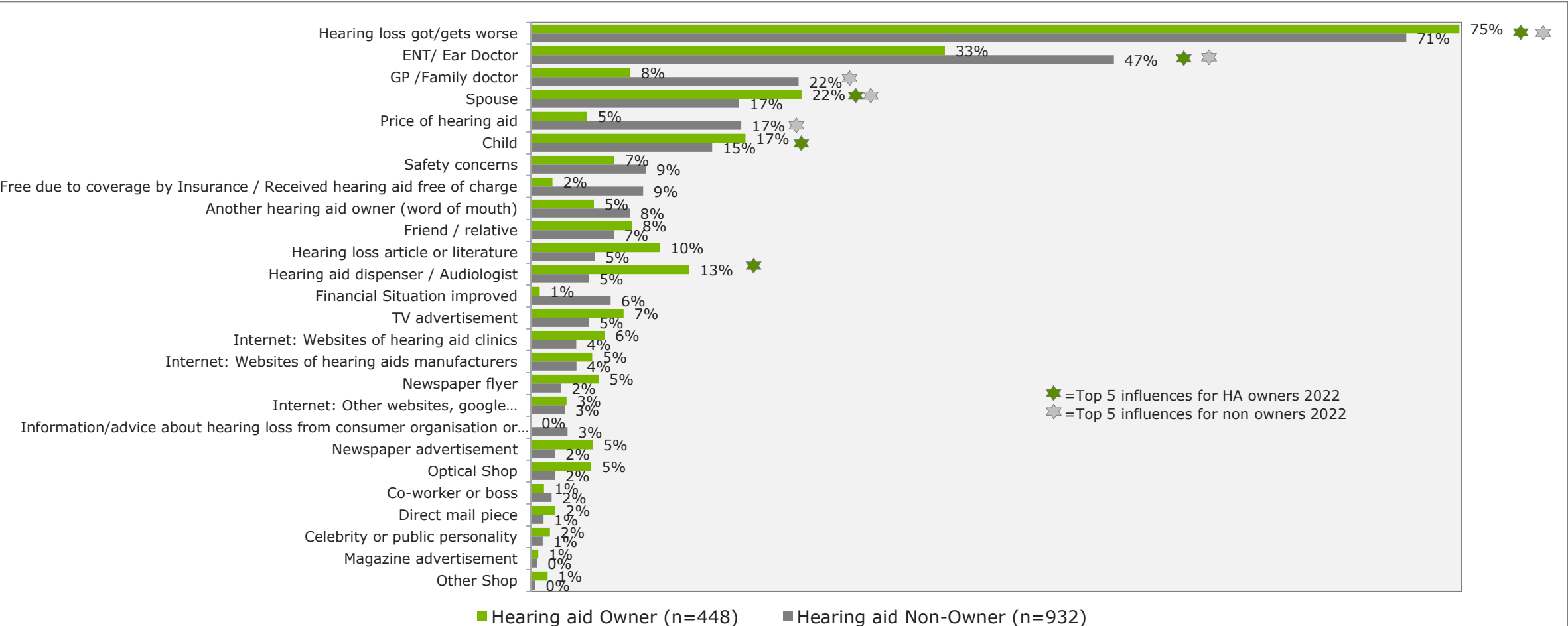


Most important triggers to buy



The most important factors influencing the decision to get hearing aids are worsening hearing, ENT, and spouse (plus GP and price for non-owners)

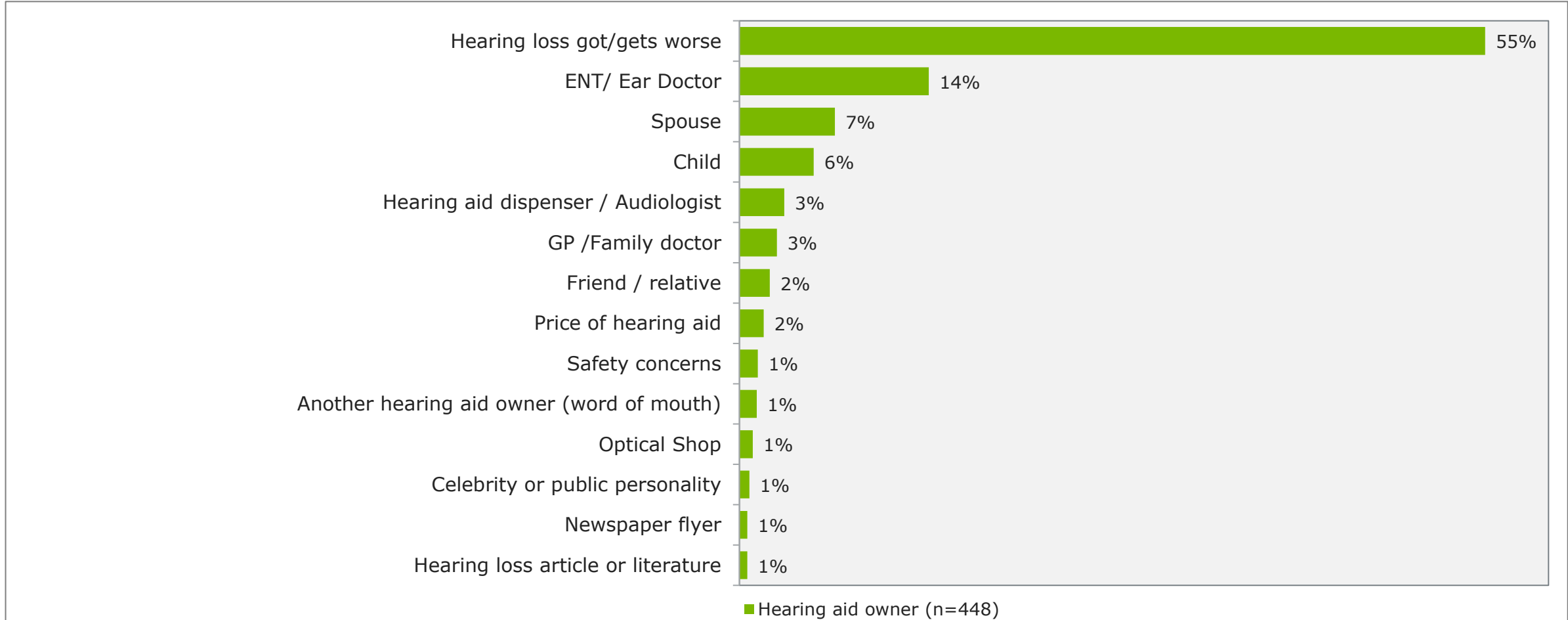
HA Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?
HA Non-owner: What do you think would influence you to obtain / purchase a hearing aid ?





The most important reasons for buying a hearing aid are worsening hearing loss and the advice of ENTs

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



Provided by:



Stefan Ruf lic. rer. pol.

Anovum GmbH
Chalenstrasse 8a
CH-8123 Ebmatingen

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

www.anovum.com



Dr. Stefan Zimmer ▪ Secretary General
European Hearing Instrument Manufacturers Association
Herriotstrasse 1 ▪ 60528 Frankfurt am Main ▪ Germany
sz@ehima.com ▪ +49-69-664 26 34 10 ▪ www.ehima.com



Peter Heil

Anovum GmbH
Chalenstrasse 8a
CH-8123 Ebmatingen

Telefon +41 (0)44 576 76 76
Mobil +41 (0)79 757 57 46
Email peter.heil@anovum.com

www.anovum.com



APPENDIX





Demographics (1)

Hearing instrument adoption rates and populations

		Count	Hearing difficulty	Hearing aid adoption rate % (Base=Hearing impaired)	No hearing loss	Hearing loss but no hearing aids (HA Non-owner)	Hearing aids (HA Owner)
Gender							
	Male	6'983	9.6%	15.6%	49.4%	42.6%	42.1%
	Female	7'385	12.3%	15.6%	50.6%	57.4%	57.9%
Age							
	1 - 14	1'719	0.8%	50.0%	13.3%	0.5%	2.7%
	15 - 24	1'329	3.1%	23.4%	10.1%	2.4%	4.0%
	25 - 34	1'444	2.3%	15.0%	11.0%	2.1%	2.1%
	35 - 44	1'670	4.0%	9.4%	12.5%	4.5%	2.6%
	45 - 54	2'079	7.2%	7.7%	15.1%	10.3%	4.8%
	55 - 64	1'865	8.3%	6.3%	13.4%	10.8%	4.1%
	65 - 74	1'761	16.0%	12.4%	11.6%	18.4%	14.5%
	75+	2'500	33.6%	19.6%	13.0%	51.0%	65.2%
Type of household							
	Single household	1'723	12.5%	19.0%	11.8%	13.2%	15.9%
	Couple, no kids	2'700	14.5%	15.0%	18.1%	24.9%	24.4%
	Couple with kid(s)	5'620	7.2%	14.5%	40.8%	25.8%	24.0%
	Single mom/dad with kid(s)	1'228	14.5%	13.3%	8.2%	11.6%	9.7%
	Retirement home, hospital etc.	189	38.0%	23.9%	0.9%	4.2%	6.7%
	Couple with kid(s) and/or grandchildren	798	7.4%	17.2%	5.8%	3.6%	4.2%
	Single grandfather/mother with kid(s) and /or grandchildren	323	13.9%	28.7%	2.2%	2.4%	5.4%
	Other	1'786	12.0%	11.5%	12.3%	14.3%	9.6%





Demographics (2)

Hearing instrument adoption rates and populations

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=Hearing impaired)	No hearing loss	Hearing loss but no hearing aids (HA Non-owner)	Hearing aids (HA Owner)
Status						
The head of the household (alone or together with someone)	6'018	15.3%	16.3%	39.9%	57.8%	60.0%
The spouse of the head of the household	3'139	12.4%	13.5%	21.5%	25.1%	21.7%
Daughter/son of head of household	4'049	2.4%	9.7%	30.9%	6.6%	3.9%
Parent of the head of household	357	25.8%	25.4%	2.1%	5.1%	9.7%
Other Person	805	10.3%	14.6%	5.6%	5.4%	4.7%
Employment						
Full time employed	4'681	5.9%	11.1%	40.1%	18.5%	13.1%
Part time employed	1'941	8.9%	11.1%	16.1%	11.6%	8.3%
Unemployed / not working	2'329	15.4%	15.9%	18.0%	22.9%	23.6%
Retired under a disability pension scheme (fully or partly)	1'854	28.6%	16.7%	12.1%	33.3%	38.0%
Early retired under an early retirement benefit scheme	127	16.5%	28.5%	1.0%	1.1%	2.5%
Retired (at the official retirement age)	735	23.8%	17.8%	5.1%	10.9%	13.0%
Student / pupil / in training	868	2.9%	15.1%	7.7%	1.6%	1.5%
Education						
A middle school	947	25.0%	18.8%	6.5%	14.5%	18.5%
A high school	3'984	13.8%	14.1%	31.2%	35.5%	32.7%
A vocational (technical) school	1'201	11.0%	17.7%	9.7%	8.2%	9.8%
A junior college	1'001	12.6%	17.2%	8.0%	7.9%	9.1%
A university	3'842	9.5%	14.1%	31.6%	23.7%	21.7%
A graduate school	365	9.7%	11.2%	3.0%	2.4%	1.6%
Other	170	14.9%	24.2%	1.3%	1.5%	2.4%
Prefer not to say	1'050	8.9%	11.0%	8.7%	6.3%	4.1%





Sample size and random sample error: Rules of thumb

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

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

