

Results

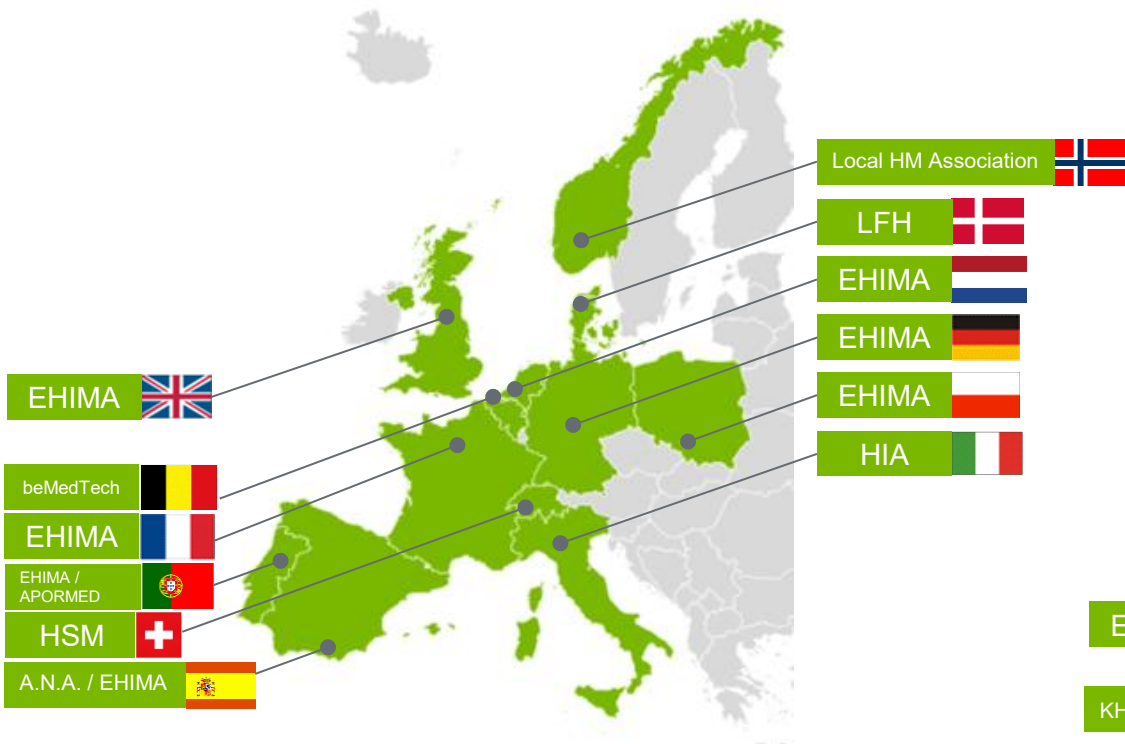
APACTrak Australia (AUS) 2025

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

Summary

1. Introduction

APACTrak AUS 2025* is part of the EuroTrak / APACTrak studies:



APACTrak AUS 2025* was designed and executed by Anovum (Zurich) on behalf of EHIMA and HCIA.

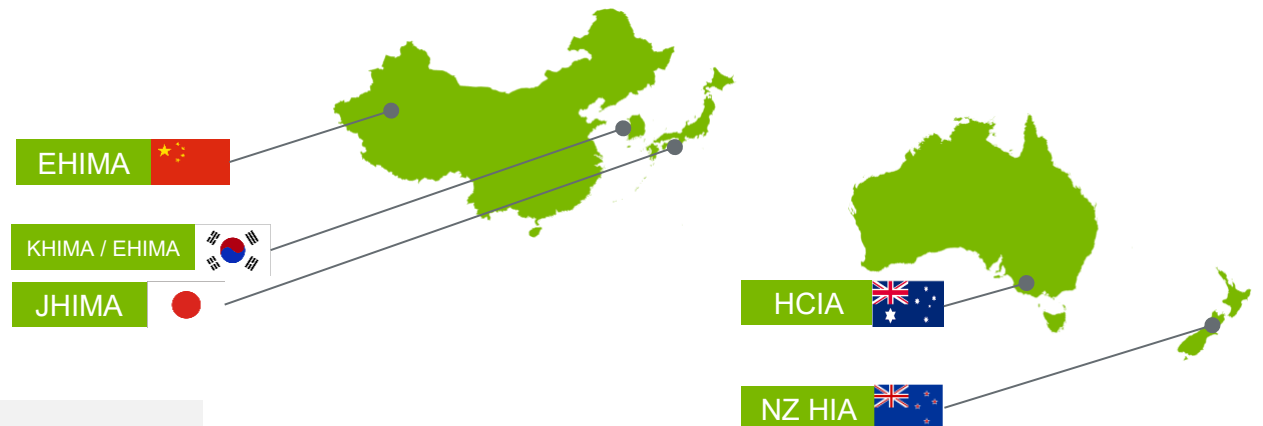
Sample sizes:

Representative sample (sample 1): n=14'863 people

Hearing impaired (sample 2): n=1'200 people

Hearing impaired non-owners (HA Non-owner): n=601 people

Hearing aid owner (HA Owner): n=599 people



*Note: The 2025 study was fielded in 2024, therefore data points are labeled as 2024.



Summary

2. Market overview

- **Stated hearing loss prevalence**
 - Total: 10.9% (2021:11.8%) , 18+: 13.1%.
 - Hearing Tests: 42% of individuals had a hearing test in the last five years, with most tests conducted in hearing aid clinics.
- **Hearing aid adoption rate (HA penetration)**
 - 45% of those with self-declared HL (2021:44.7%
 - 4.9% of total population.
 - 62% of HA owners have binaural treatment.
- **The route to the hearing aid**
 - 65% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
 - 57% got hearing aids recommended from the ENT or family doctor (drop out rate=12%).
 - 36% of the GP consultations referred to an ENT, 56% to an HA clinician / Audiologist, and 22% to get hearing aids. 8% recommended no action.
 - 57% of ENT consultations were referred to an HA clinician /Audiologist, 40% recommended getting a hearing aid, and 14% recommended no action.
- **Potential social cost-savings due to the use of hearing aids**
 - Hearing aids are believed to have a positive impact on the job.
 - Hearing aid owners have a lower risk of being depressed.
 - Quality of sleep seems to improve if the hearing impaired use hearing aids.
 - Hearing aid owners are less exhausted in the evening.
 - 34% of employed individuals using hearing aids believe the devices enable them to work longer

Summary

3. Analysis of hearing aid owners

- **Hearing aid ownership, usage, and accessories**
 - 71% of hearing aid owners received third-party reimbursement.
 - 63% 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 7.4 hours a day.
 - RICs are the most often purchased type of HA.
 - Cochlear Implants: 37% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
 - 56% of HA owners use a hearing aids app, and 75% are satisfied.
 - 18% of the HAs are (to the knowledge of the owners) equipped with Telecoil. The main usage of Telecoil is the phone.
- **Importance of listening situations and satisfaction with HAs**
 - 87% of the hearing aid owners say their hearing aid works better than or as expected.
 - 75% of the HA owners are satisfied with their hearing aids.
 - The more hours worn per day, the higher the satisfaction with the HA.
 - Satisfaction with newer hearing aids is higher than with older hearing aids.
 - The most important listening situations are talking with family at home, phone conversations, and small group conversations
- **Positive impact of HAs**
 - Hearing aids positively impact communication abilities, social participation, and more.
 - 69% of hearing aid owners feel more confident moving in a city since wearing hearing aids.
 - 96% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
 - 70% 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**

- Only 24% of the hearing impaired without hearing aids think that a third party would pay for any part of hearing aids.
- The main reasons for not using hearing aids include perceptions of discomfort, affordability issues, higher-priority concerns, and the belief that their hearing is adequate in most situations.
- 7% who own hearing aids don't use them (0 hours); 16% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**

- 62% 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 key factors influencing the decision to get hearing aids are worsening hearing, advice from clinicians, GPs, ENTs, spouses, and cost (especially for non-owners)

Detailed Results: Roadmap

1. Introduction

- Organisation of APACTrak AUS 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 APACTrak AUS 2025

Organisation

- Principal of the project APACTrak AUS 2025* are: EHIMA and HCIA.
- Anovum Zurich developed the concept of APACTrak AUS, 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.

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 – APACTrak AUS/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.

*Note: The 2025 study was fielded in 2024, therefore data points are labeled as 2024.

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=14'863** 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= 601** hearing impaired non-owners and **n=599** hearing aid owners



2. Market overview

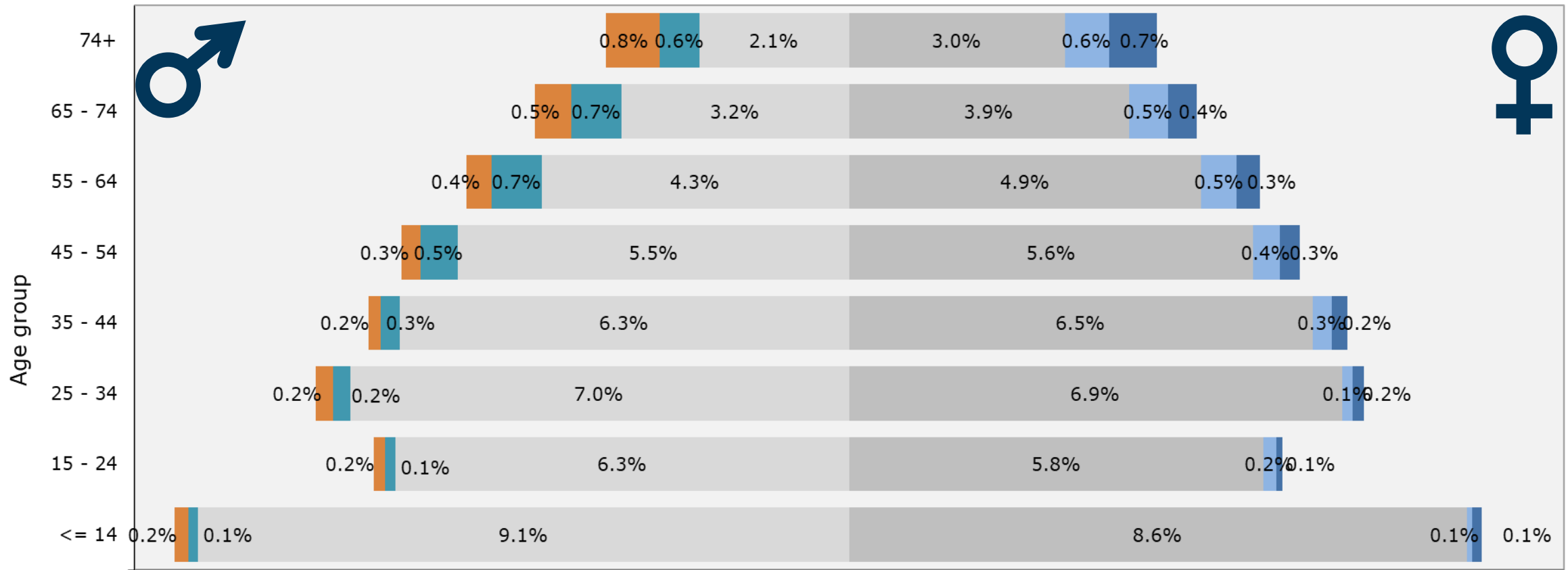




Prevalence of hearing loss and adoption rate



Hearing loss and hearing instrument ownership by gender/age



n=14'863

- Women: Unimpaired non-owner
- Women: Impaired non-owner
- Women: HA owner
- Men: Unimpaired non-owner
- Men: Impaired non-owner
- Men: HA owner

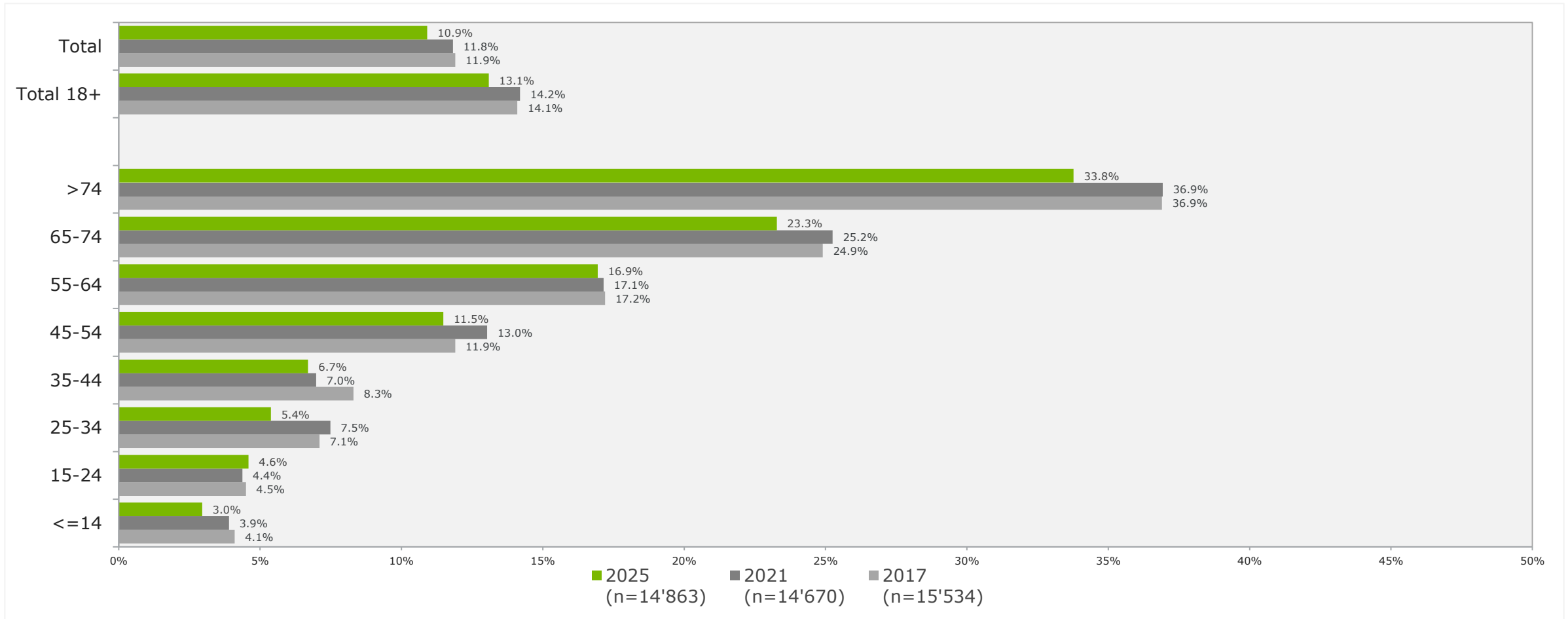




Hearing loss prevalence AUS

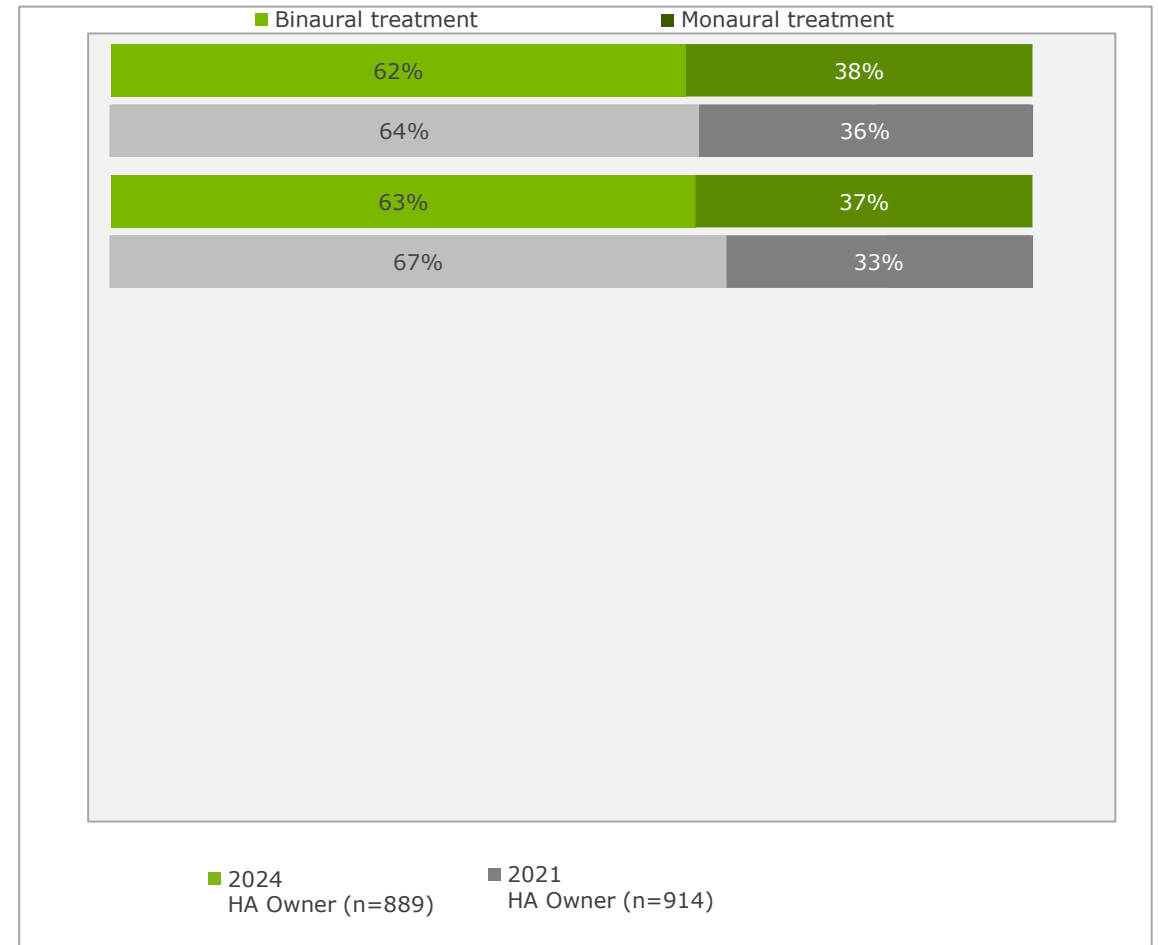
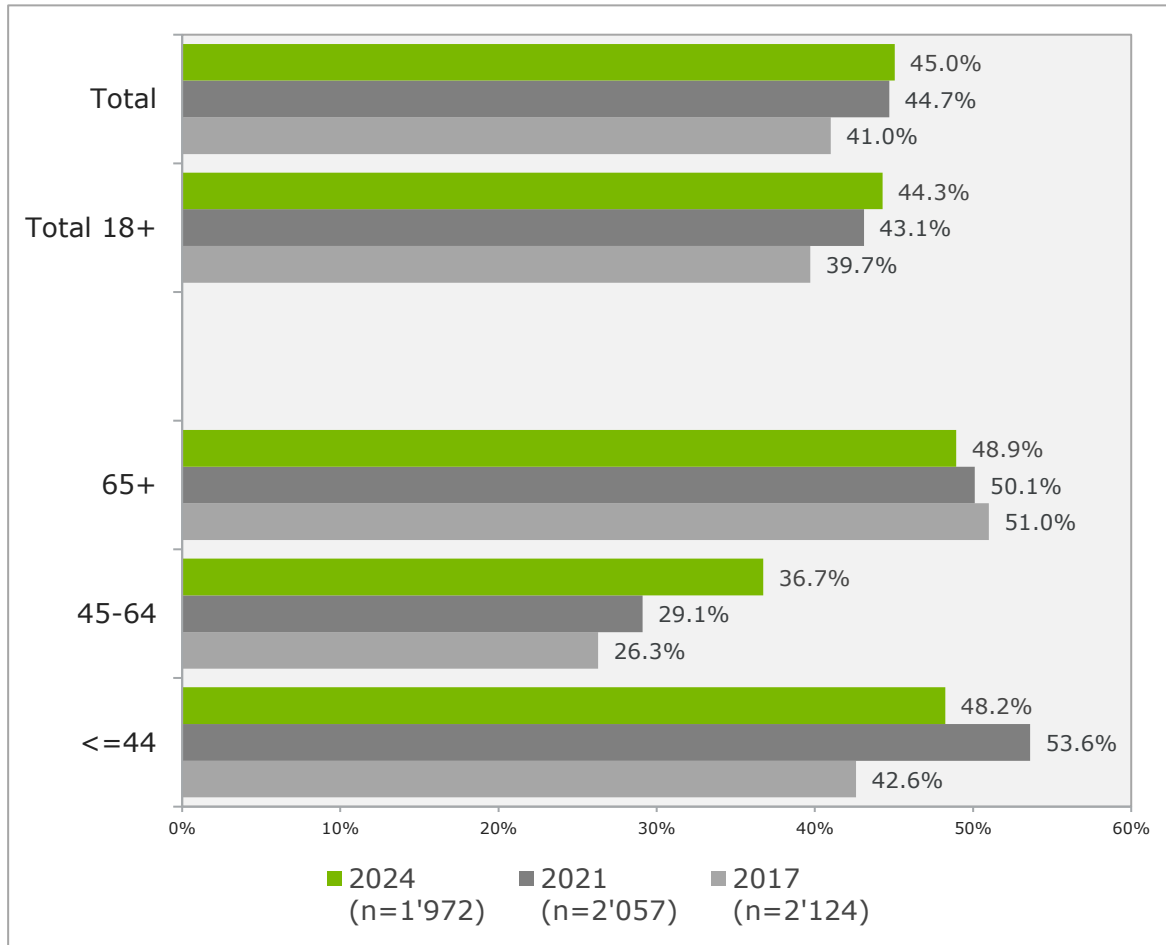
Self-declared hearing loss

% hearing loss prevalence



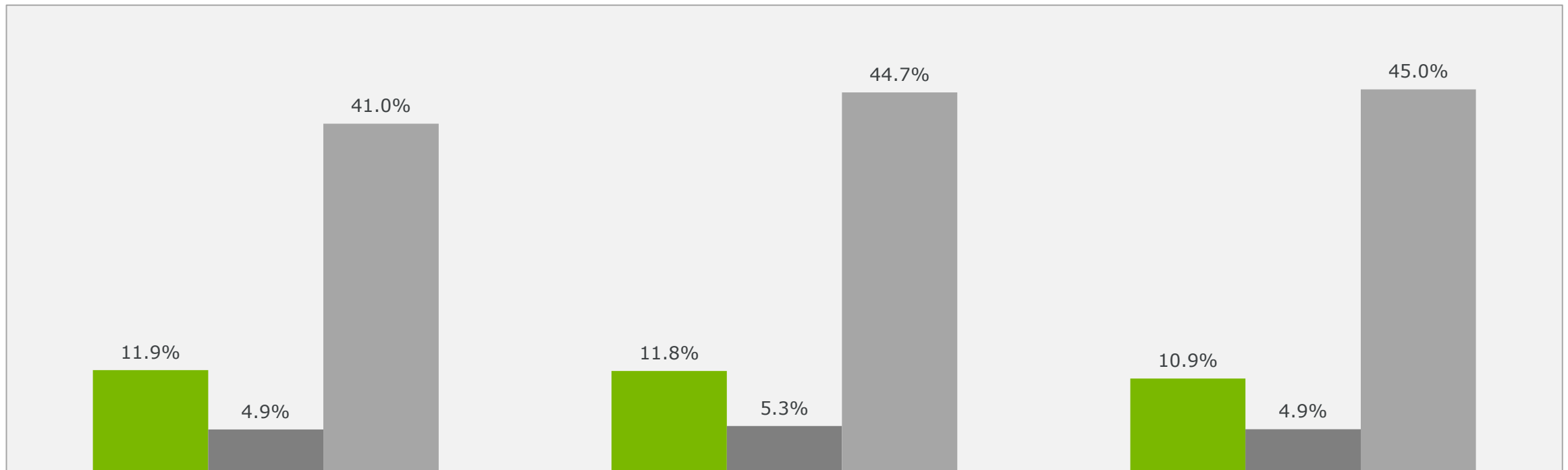
Hearing aid adoption rate: 45% of the hearing impaired have hearing aid(s), and 62% of them have binaural treatment

% of hearing impaired





Overview of hearing loss prevalence and hearing aid adoption



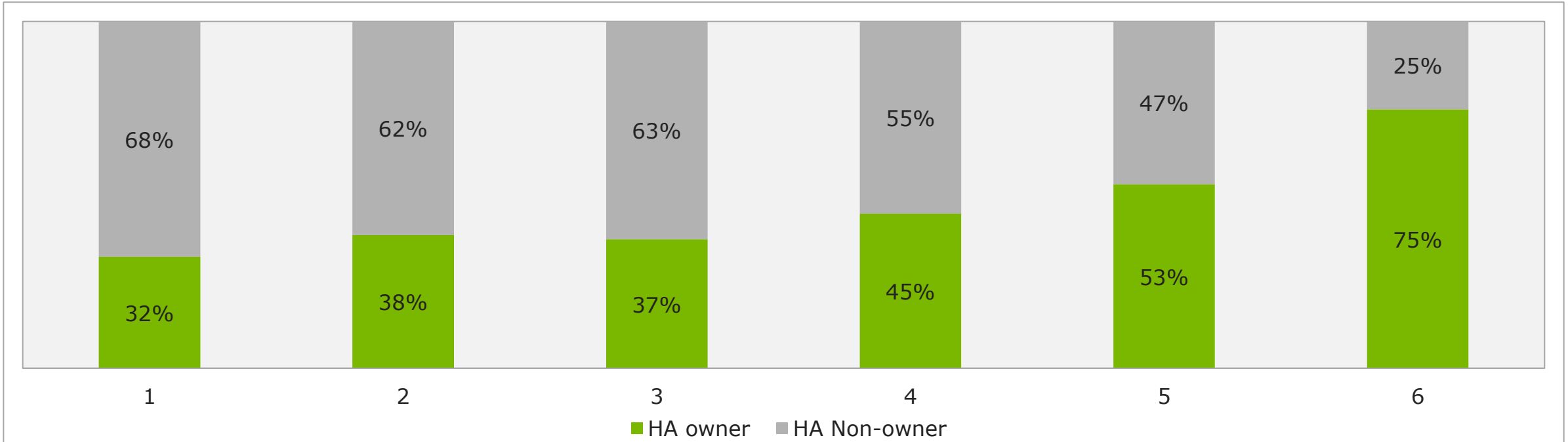
n=14'863

- Hearing impaired (self-stated)
- HA Adoption (people with hearing aids in % of population)
- HA Adoption rate (people with hearing aids in % of hearing impaired)





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=601
HA Owner n=599



Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	HA Non-owner n=601	HA Owner n=599	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	36%	26%	40%
Bilateral loss	64%	74%	51%
Perceived loss			
Mild	45%	20%	26%
Moderate	45%	50%	47%
Severe	9%	24%	73%*
Profound	1%	6%	

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

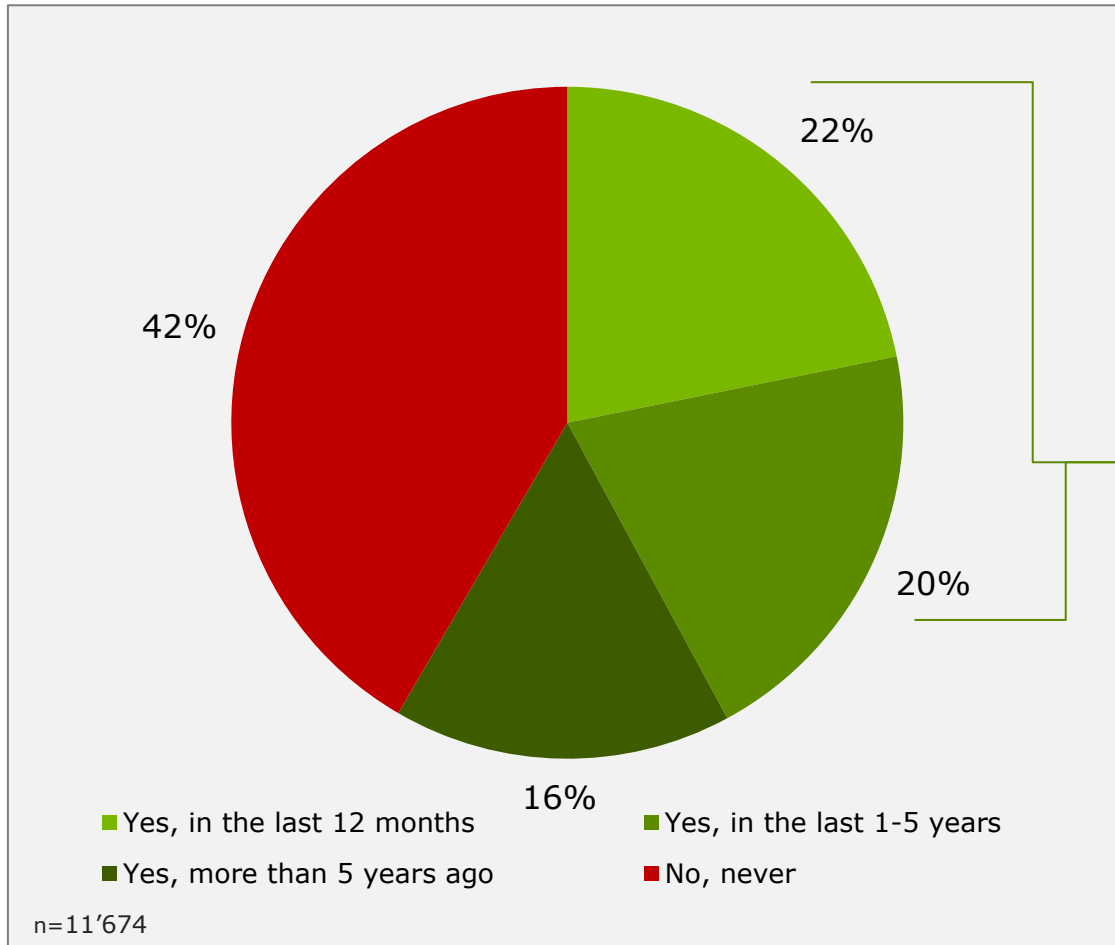


Hearing tests and where hearing is tested

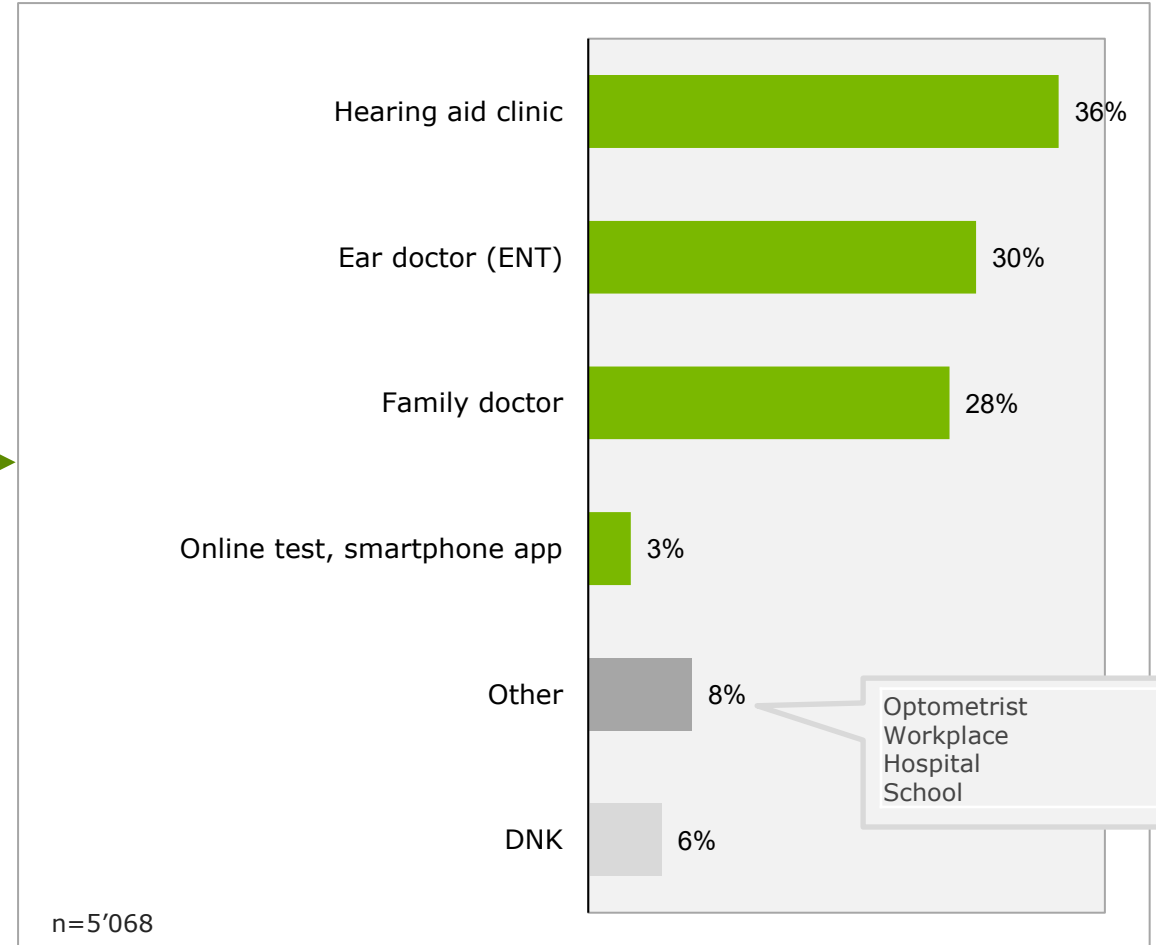


Hearing Tests: 42% of individuals had a hearing test in the last five years, with most tests conducted in hearing aid clinics

Have you ever taken a hearing test?



Where/how was your hearing tested?





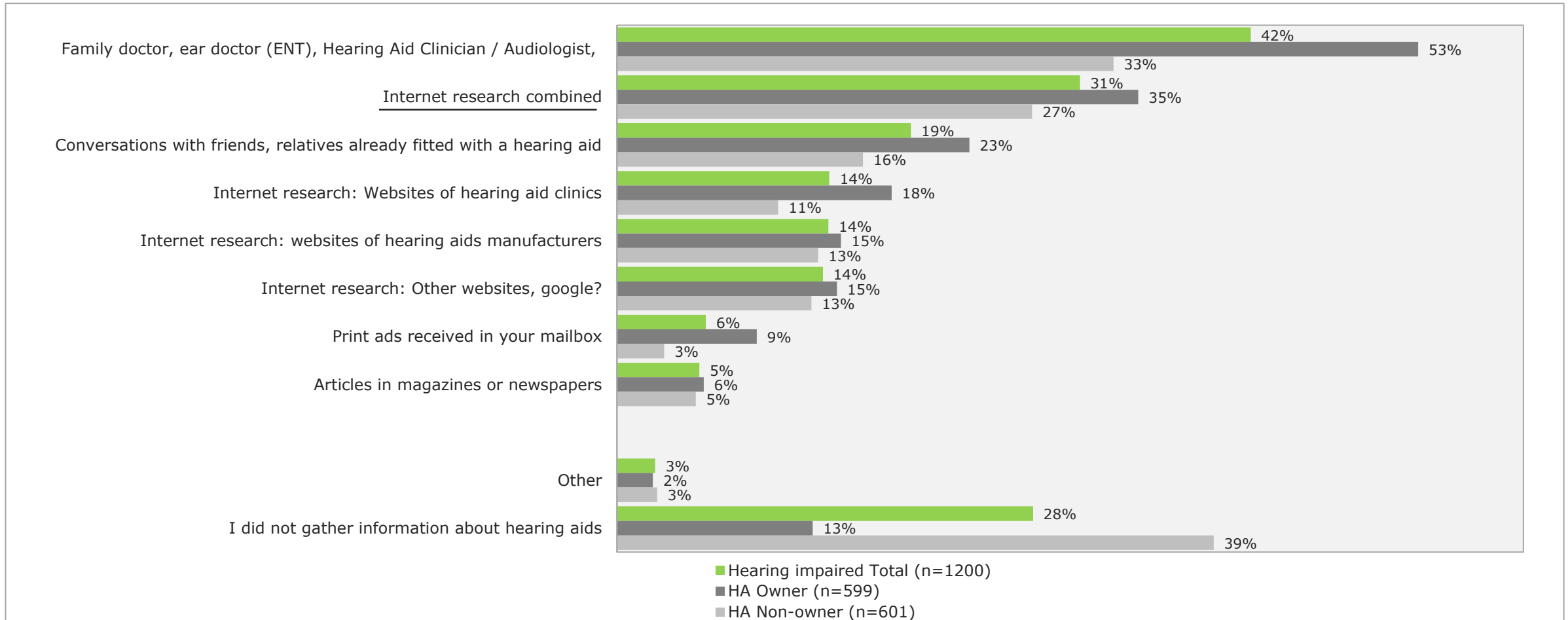
The route to the hearing aid: Sources of information and drop-out rates





Doctors and HCPs are the most important sources of information and key gatekeepers, followed by internet research and hearing aid users

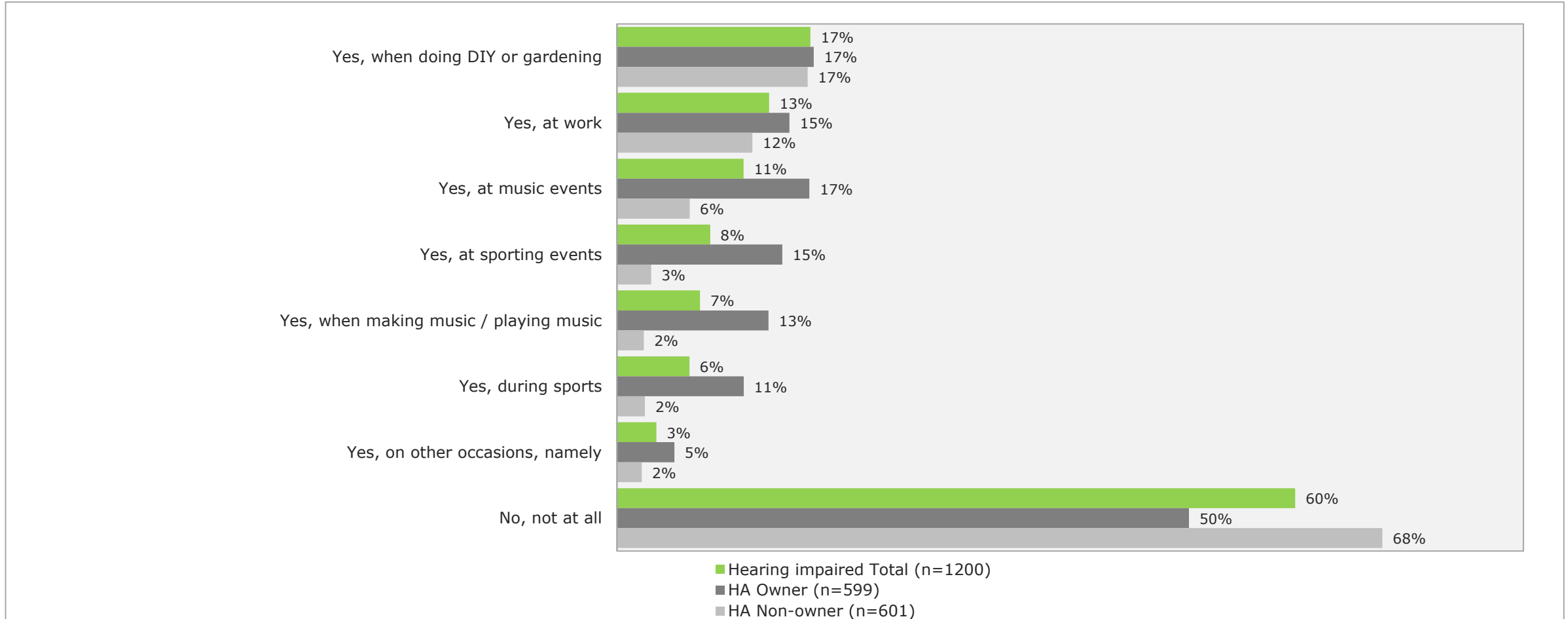
Where did you gather information about hearing aids?





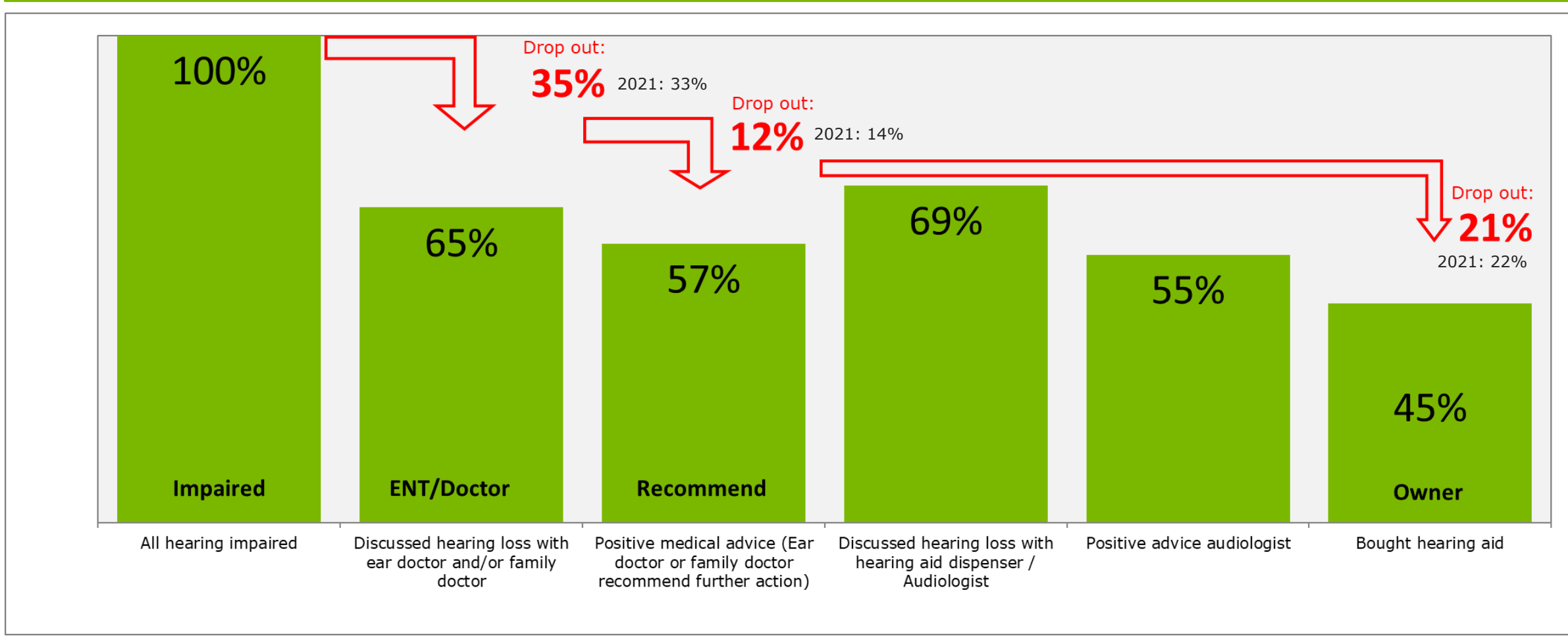
Usage of hearing protection by hearing impaired

Do you use hearing protection at least occasionally?





The route to the hearing aid

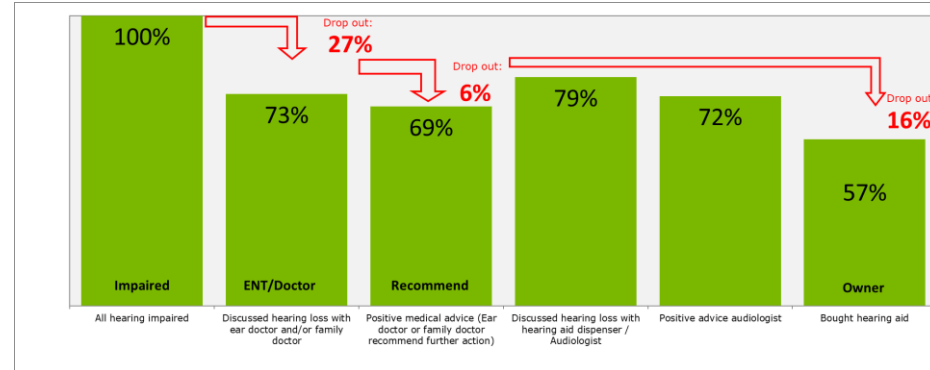


n=1'200

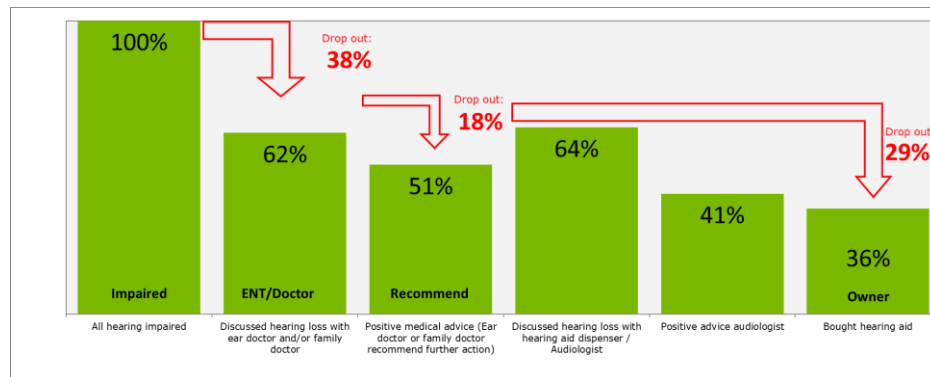


Much higher drop-out-rates for the lower hearing loss segments

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:

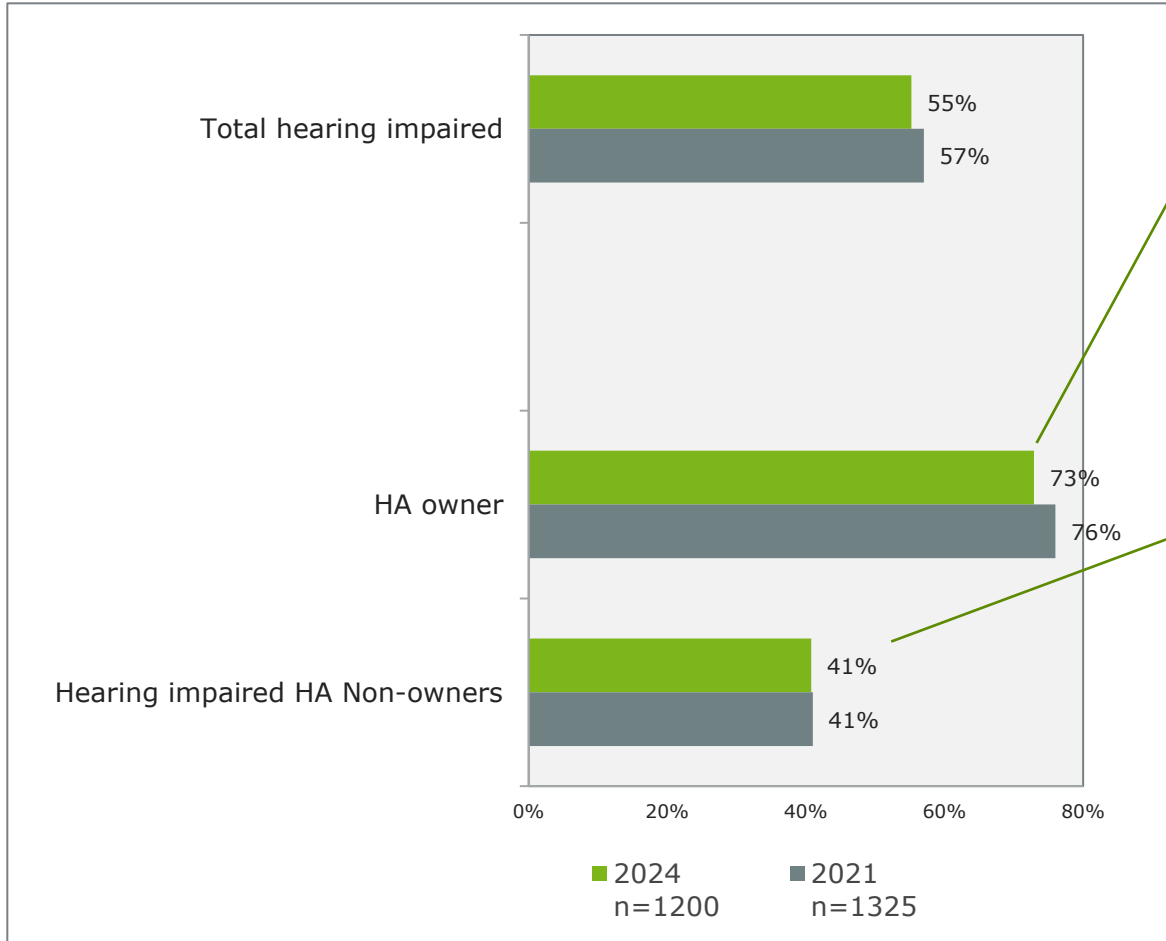
- Number of ears impaired (one or two)
 - Stated hearing loss (Mild to Profound)
 - Scores on 6 APHAB-EC - like questions (Scaled 1-5)
 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



The route to the hearing aid: GP/Family doctor

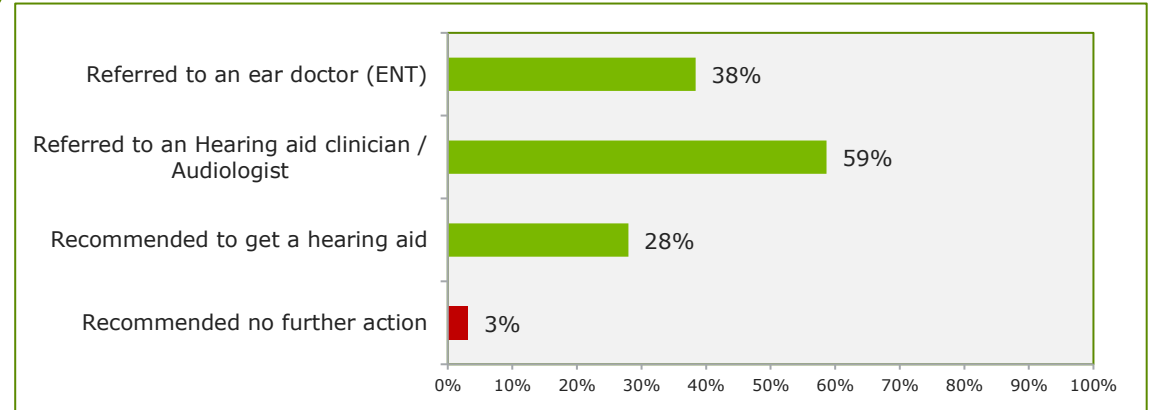
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

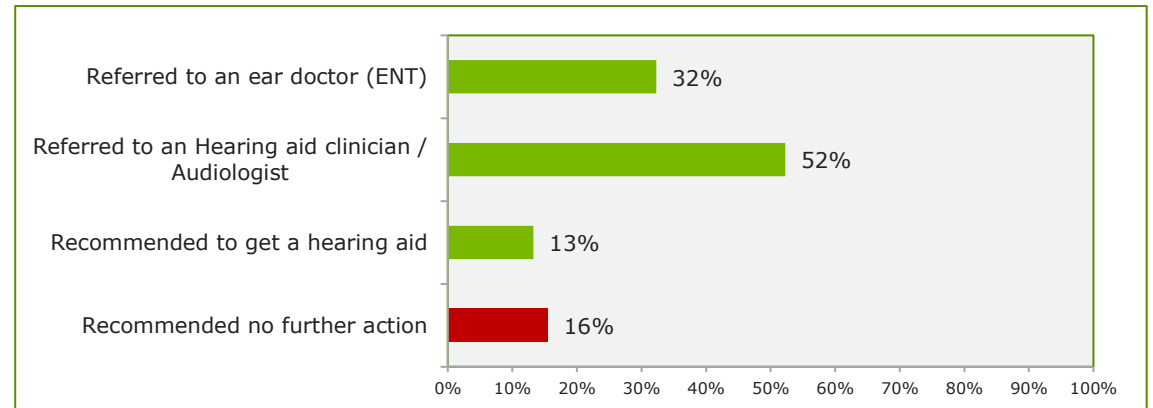


What did he/she recommend ?

HA Owner (n=408)



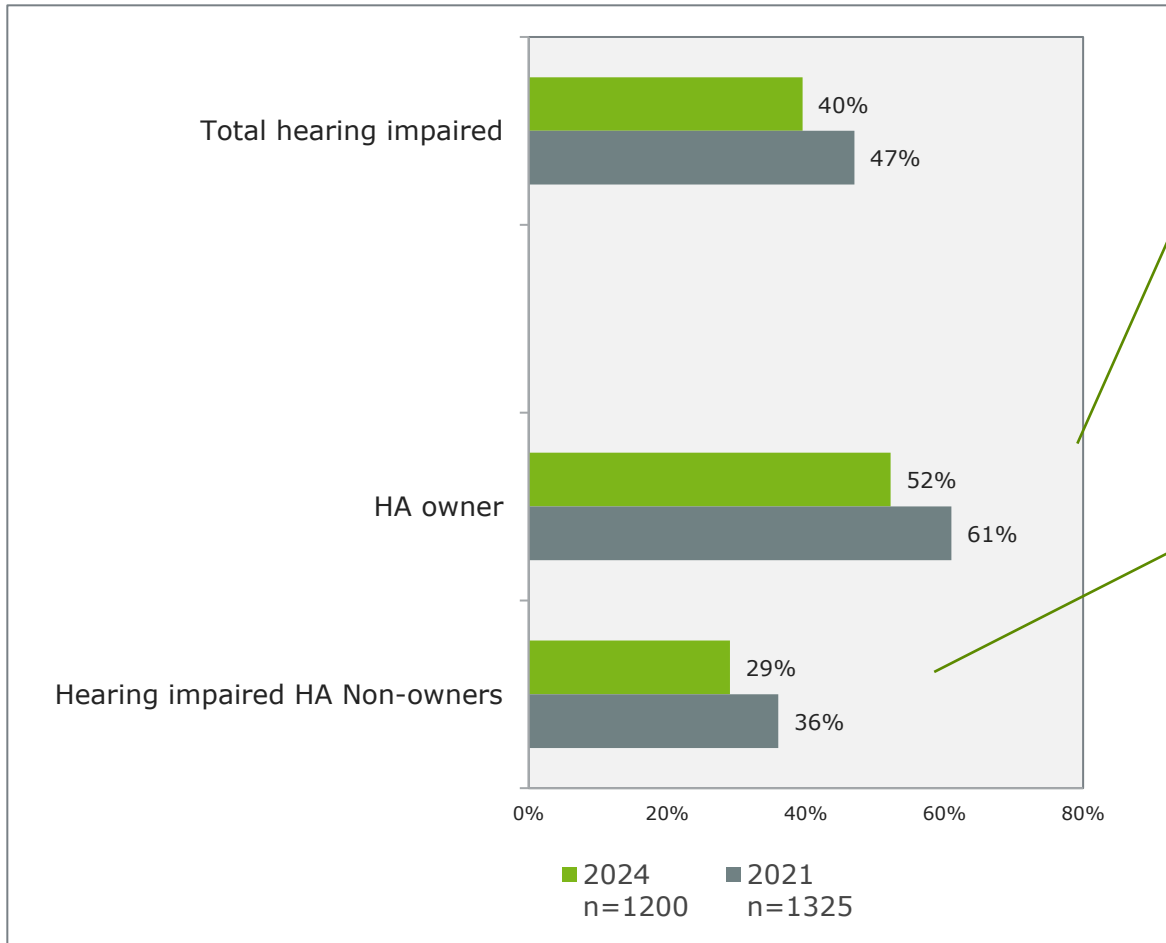
Impaired HA Non-owner (n=243)



The route to the hearing aid: ENT

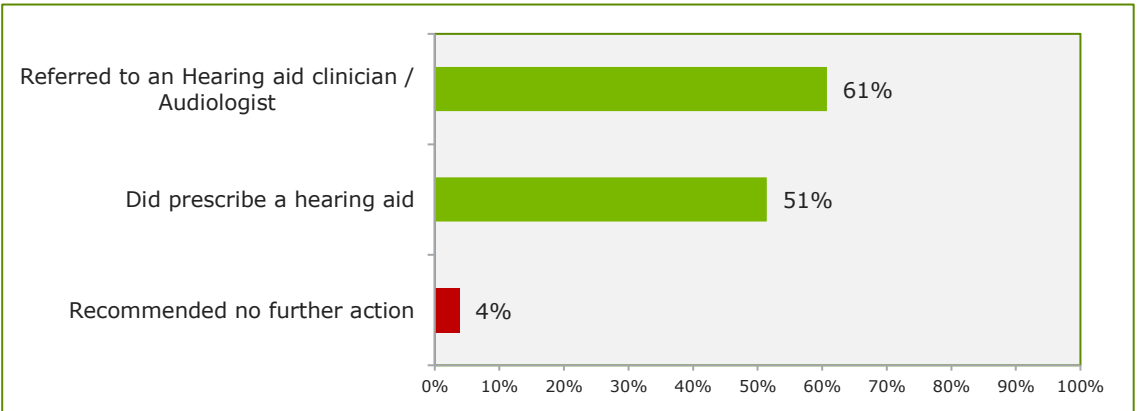
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

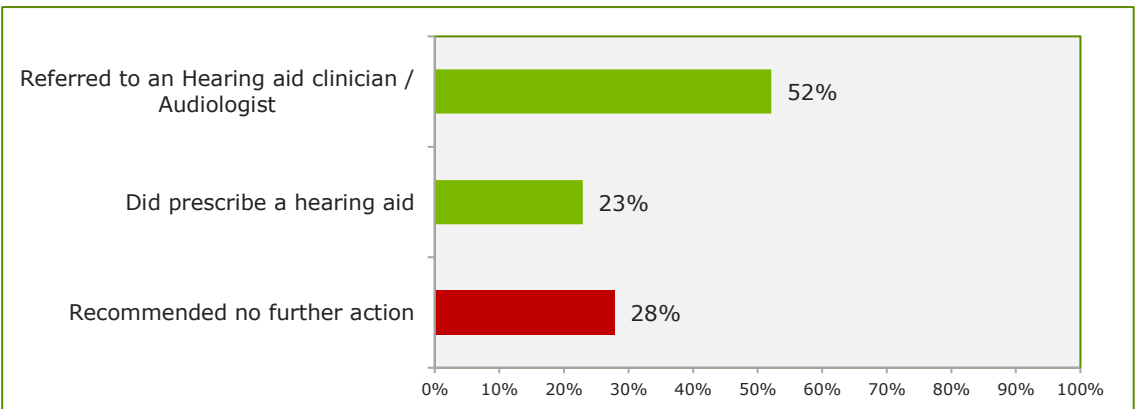


What did he/she recommend ?

HA Owner (n=277)

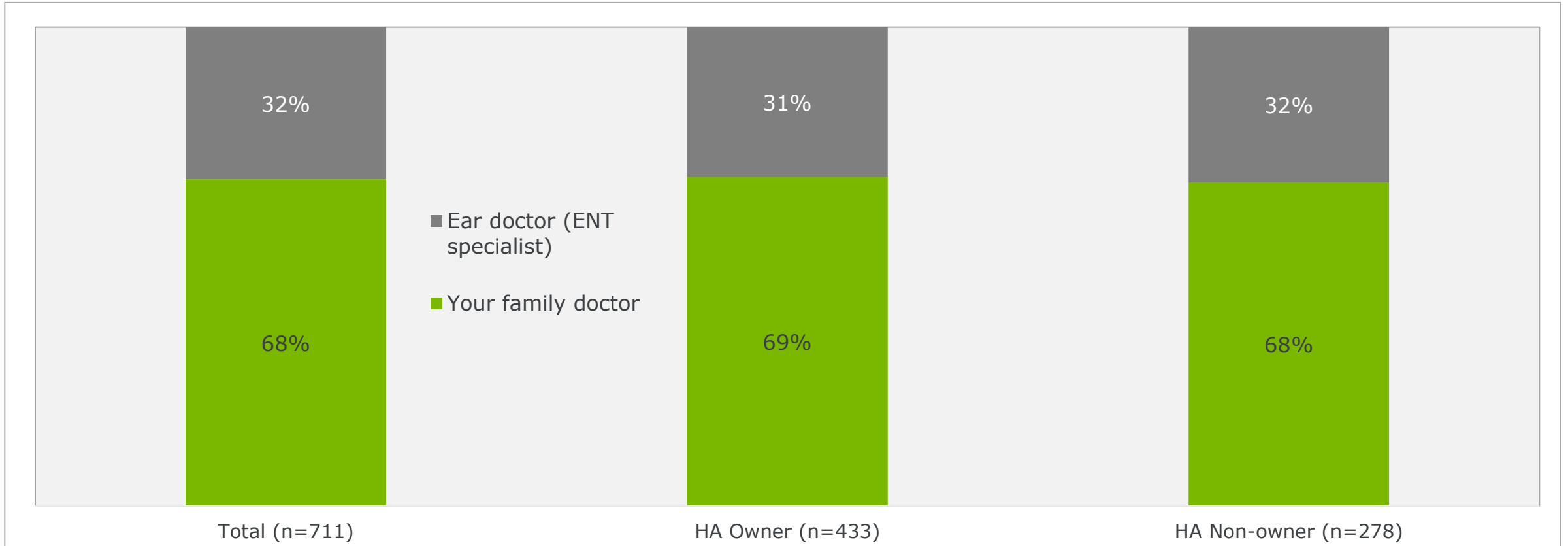


Impaired HA Non-owner (n=170)



Of those who discussed the hearing loss with a doctor, most spoke to a GP/family doctor first

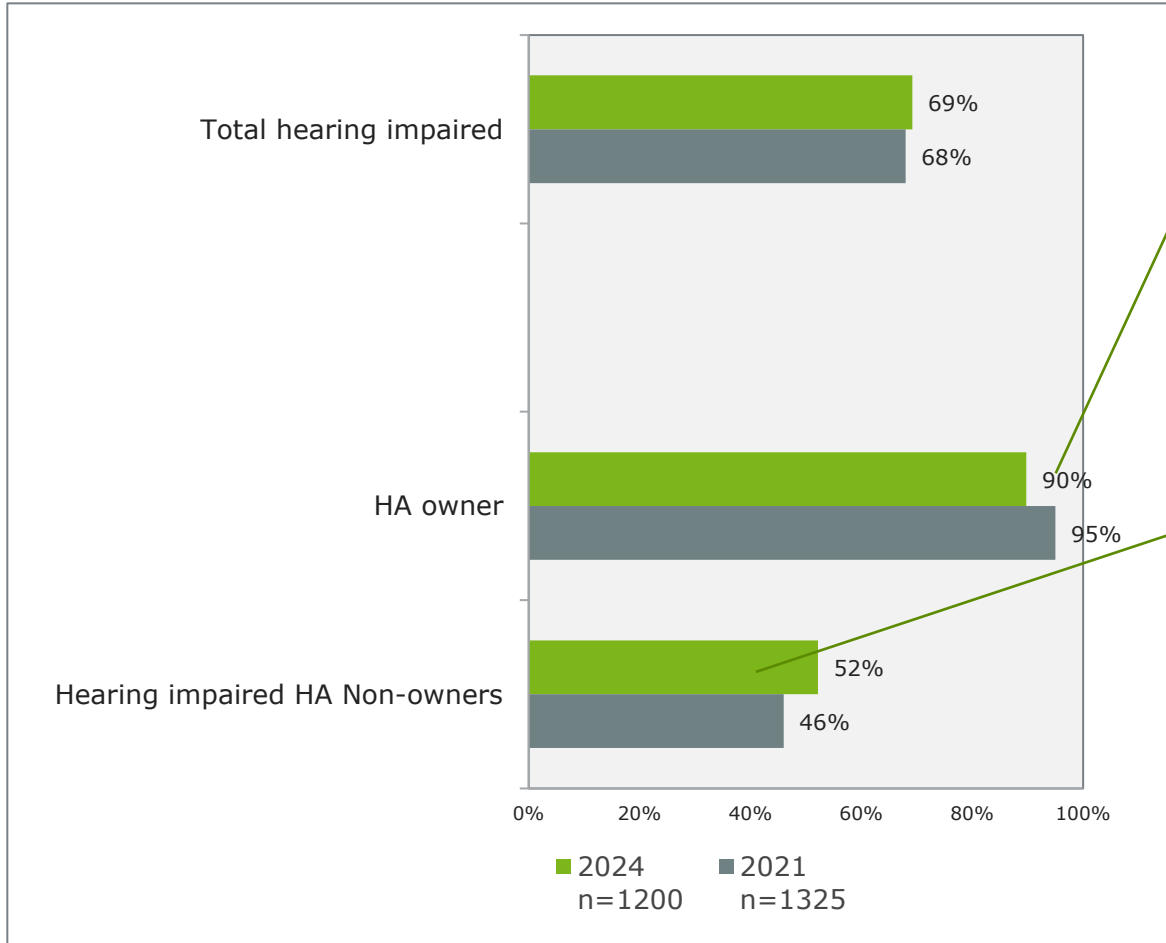
Those who discussed hearing loss with family doctor and/or ENT:
Who was the doctor you discussed your hearing loss with for the **first time** – your family doctor or the Ear, Nose and Throat specialist (ENT)?



The route to the hearing aid: Clinician/Audiologist

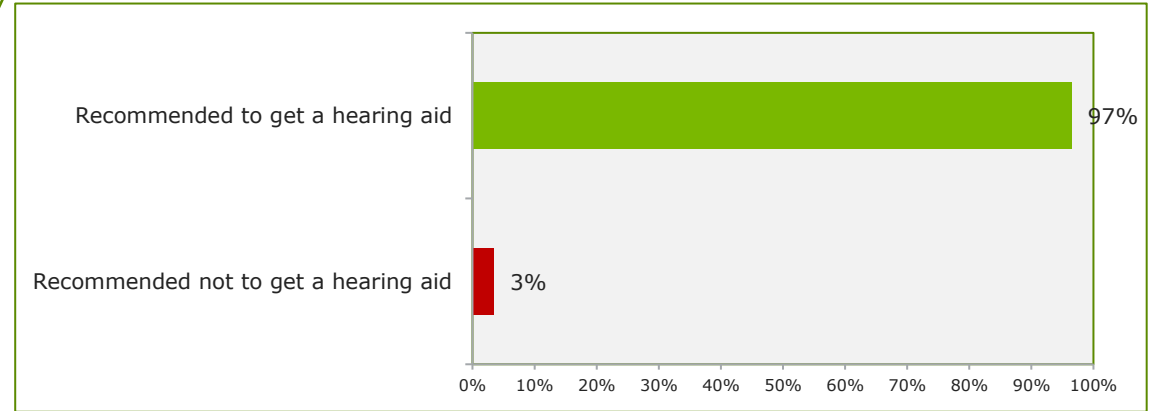
Have you ever discussed your hearing problem with a HA clinician / Audiologist?

% Discussed with HA clinician / Audiologist

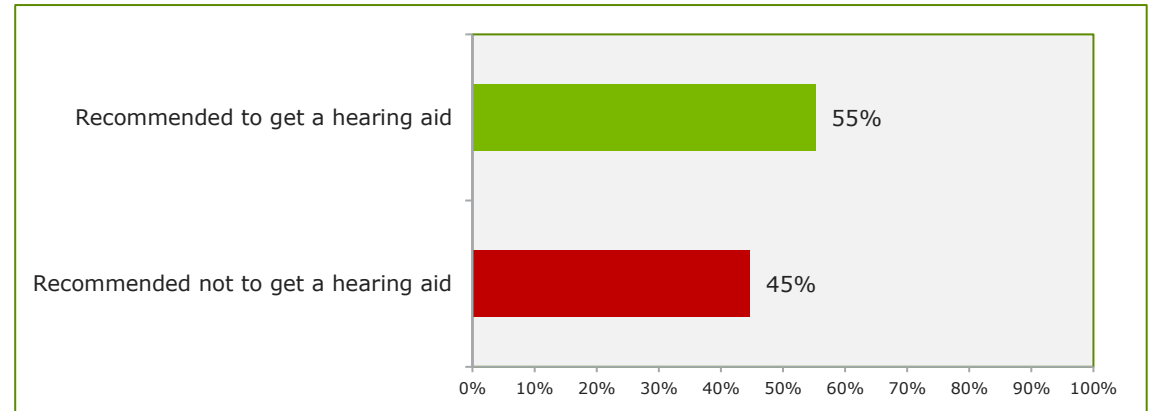


What did he/she recommend ?

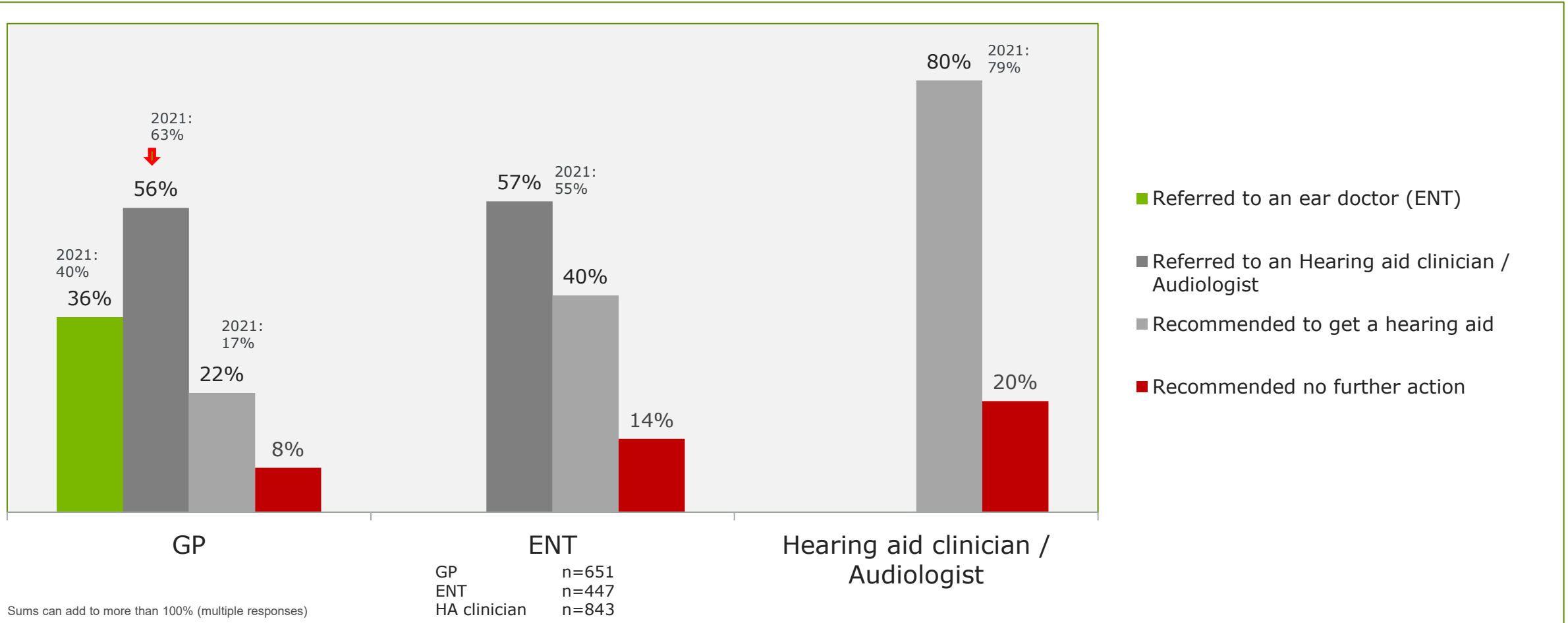
HA Owner (n=543)



Impaired HA Non-owner (n=300)



Recommendations by profession



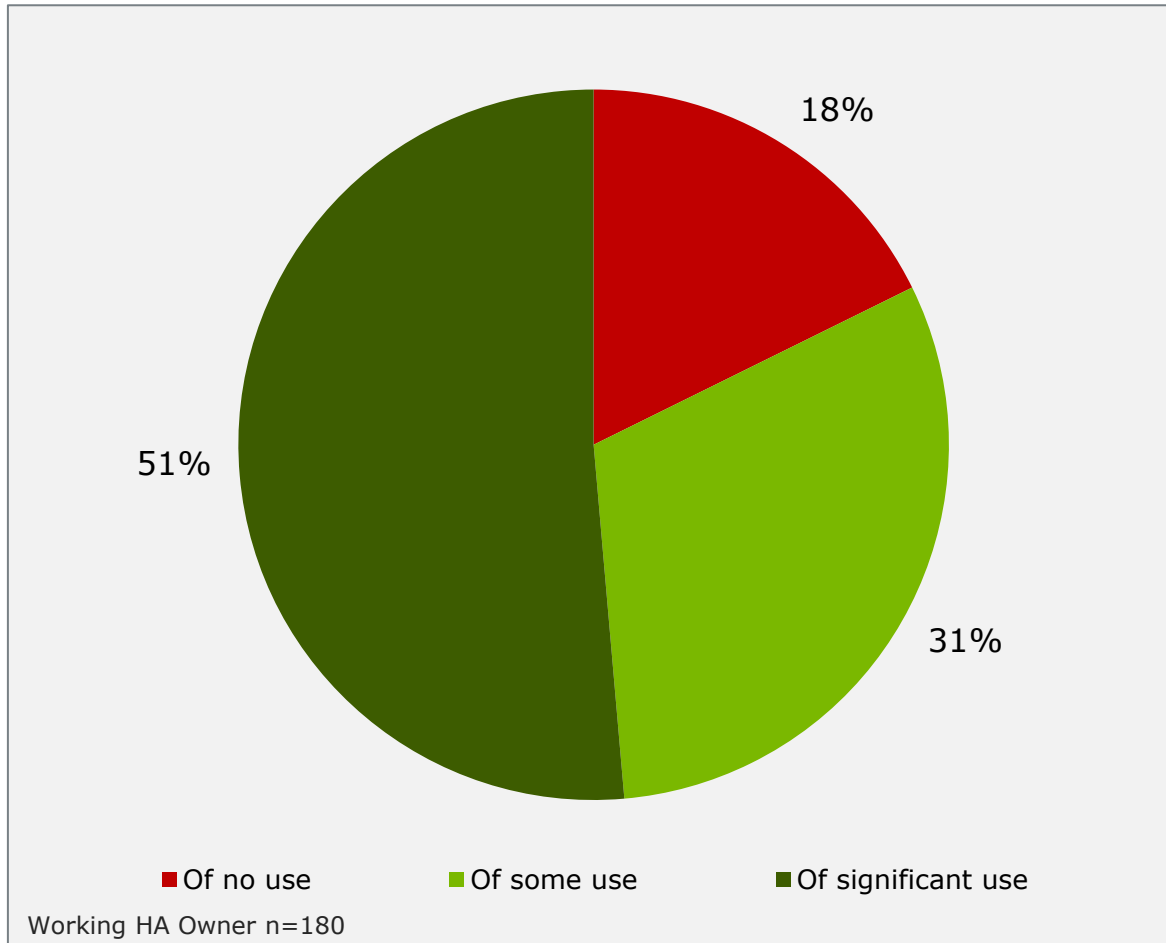


Potential social cost-savings due to the use of hearing aids:
Work competitiveness, depressive symptoms, sleep quality, co-morbidities



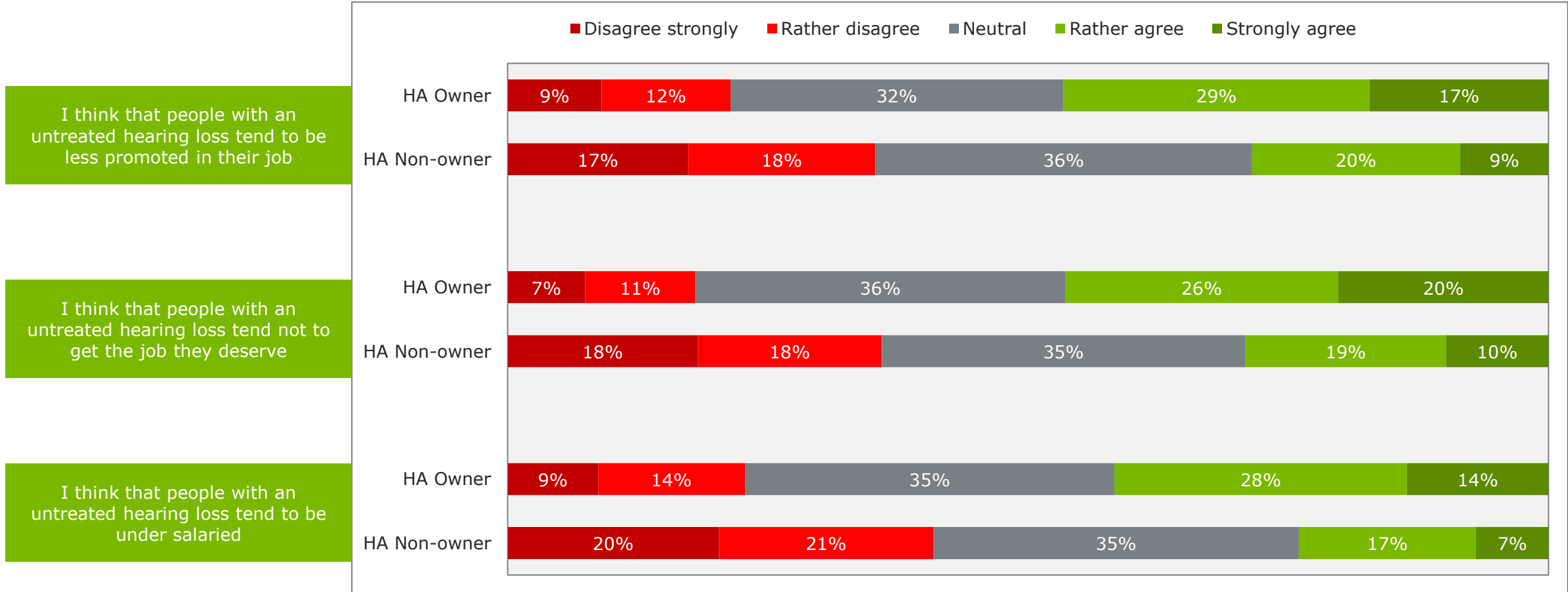
Work competitiveness: 82% of the working hearing aid owners state that their hearing aid(s) are useful on their job

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=413 / HA Non-owner n=451

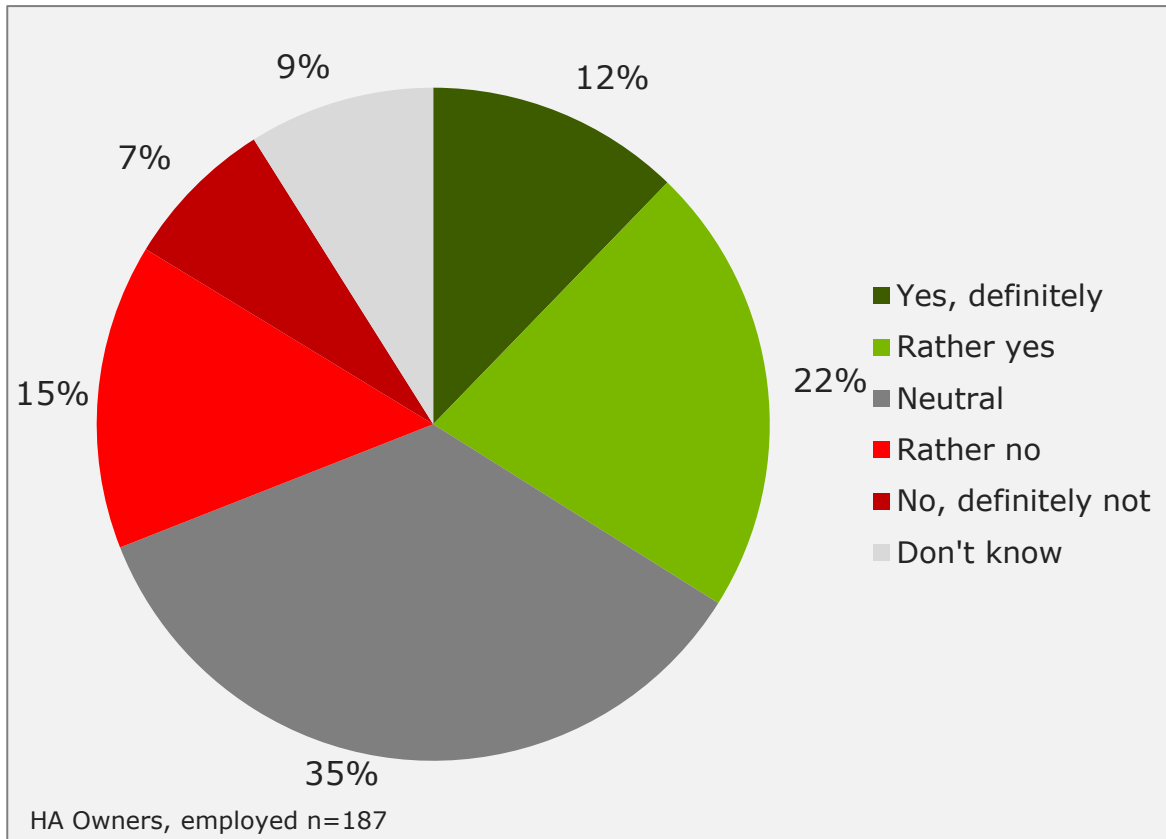




34% of employed individuals using hearing aids believe the devices enable them to work longer

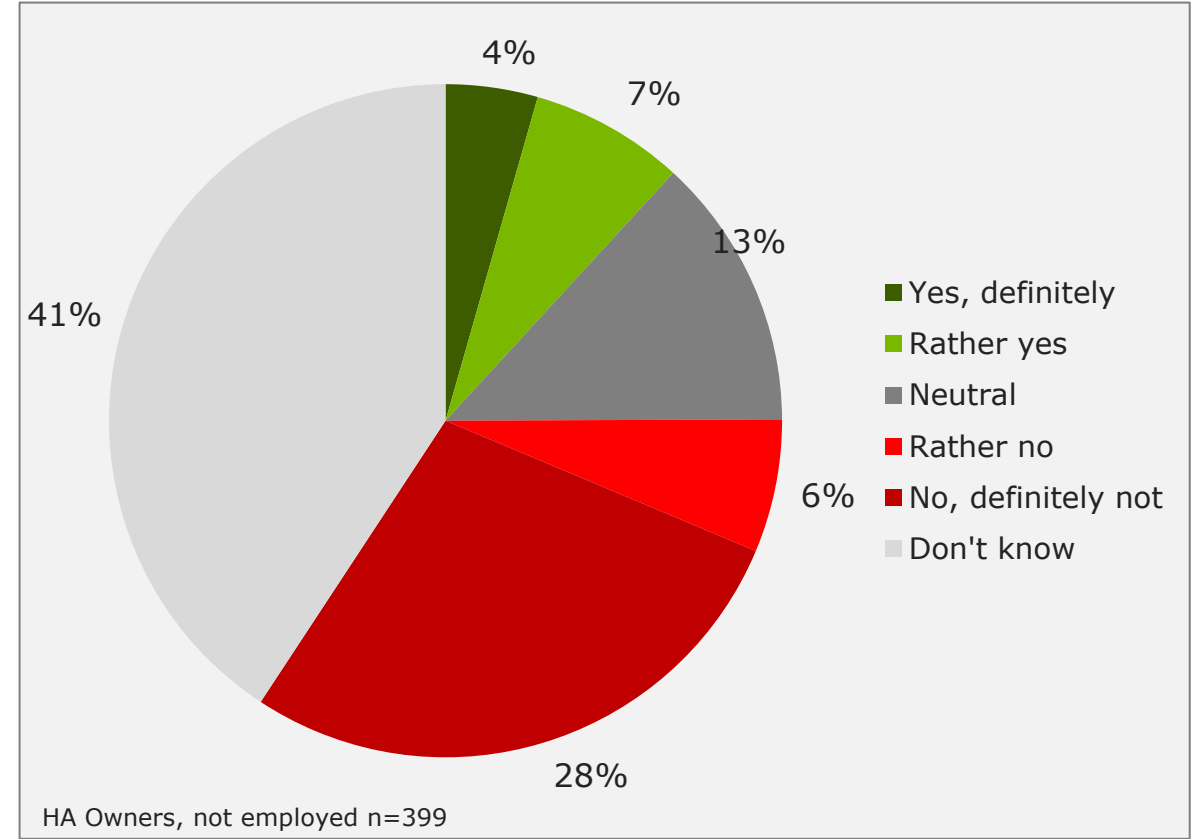
HA Owners, employed:

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*)

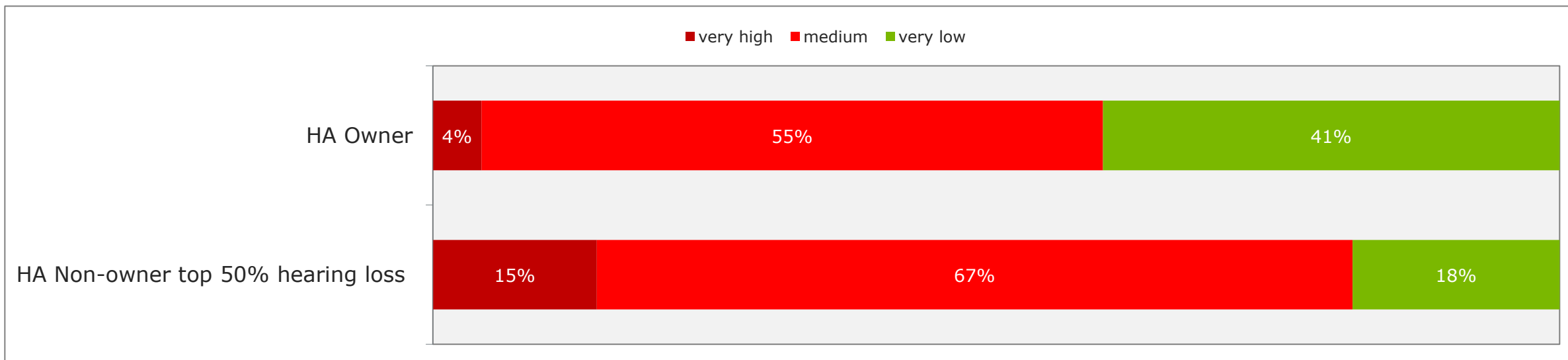
Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

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

Probability of major depressive disorder



HA owner n=394 / HA Non-owner top 50% hearing loss n=127

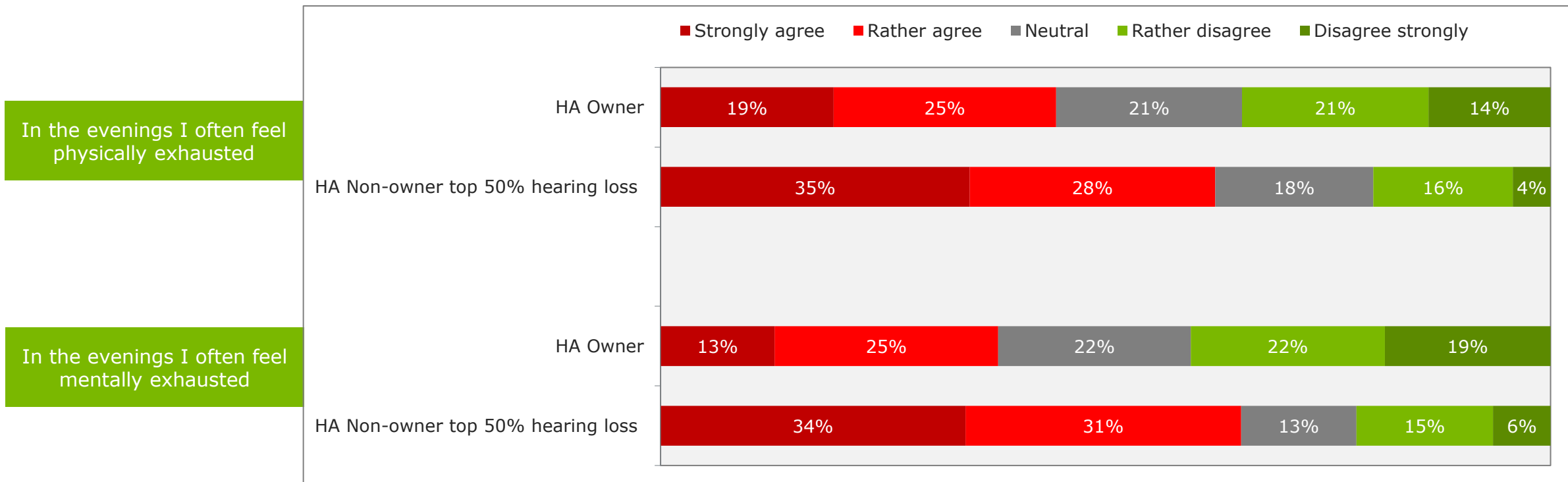
*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- 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=388 / HA Non-owner top 50% hearing loss n=126

*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:

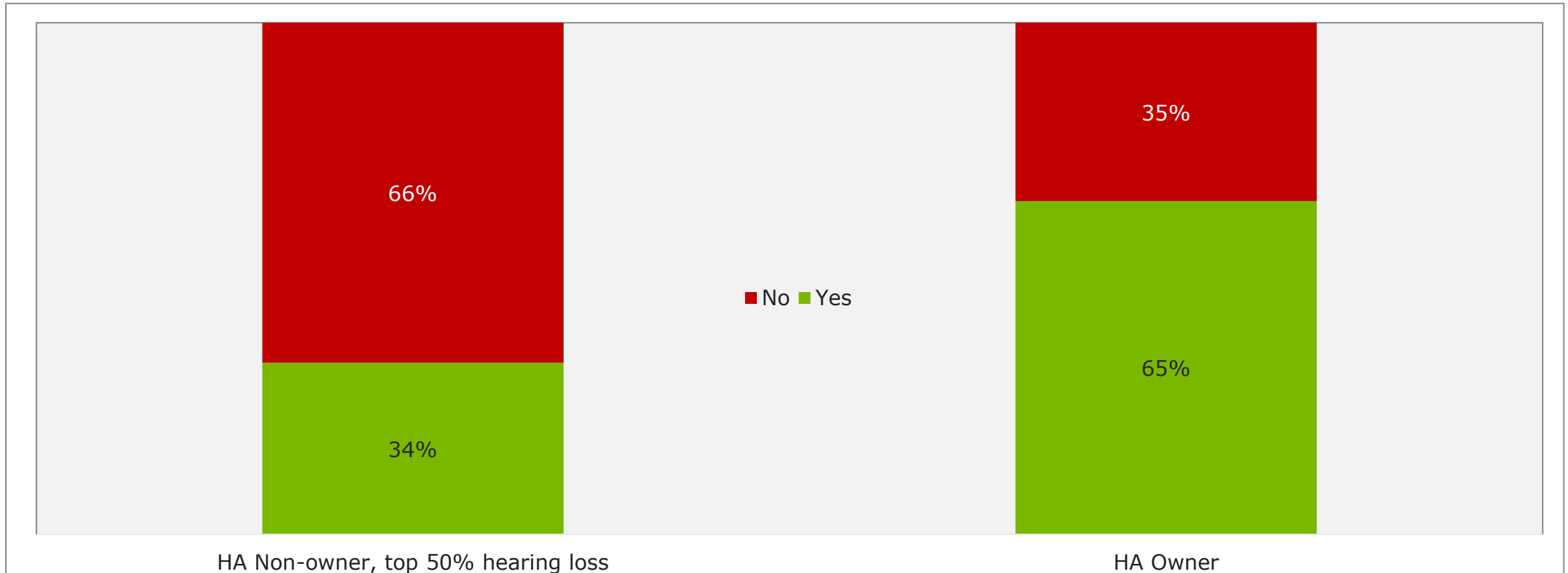
- Number of ears impaired (one or two)
 - Stated hearing loss (Mild to Profound)
 - Scores on 6 APHAB-EC - like questions (Scaled 1-5)
 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67% 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?

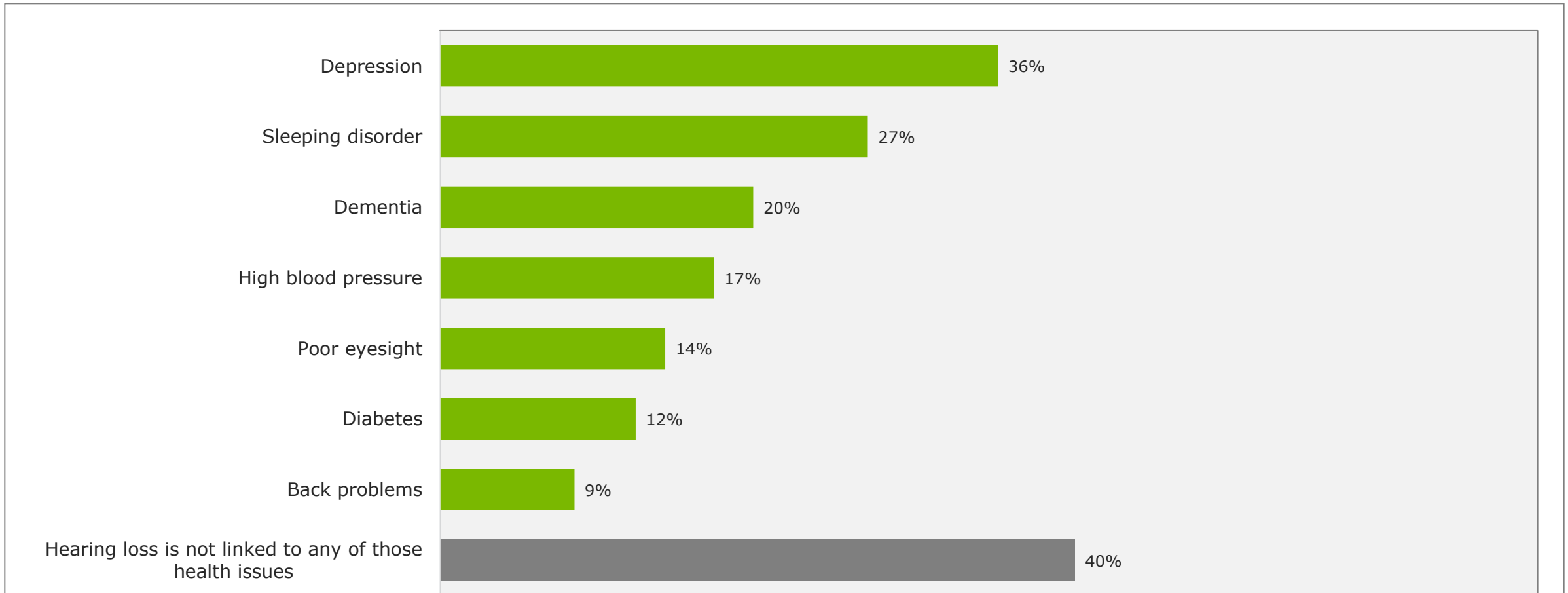


HA Non-owner top 50% hearing loss n=127 / HA Owner n=394



36% of all hearing-impaired think that hearing loss could be linked to depression

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



Hearing impaired, n=1'200





3. Analysis of hearing aid owners



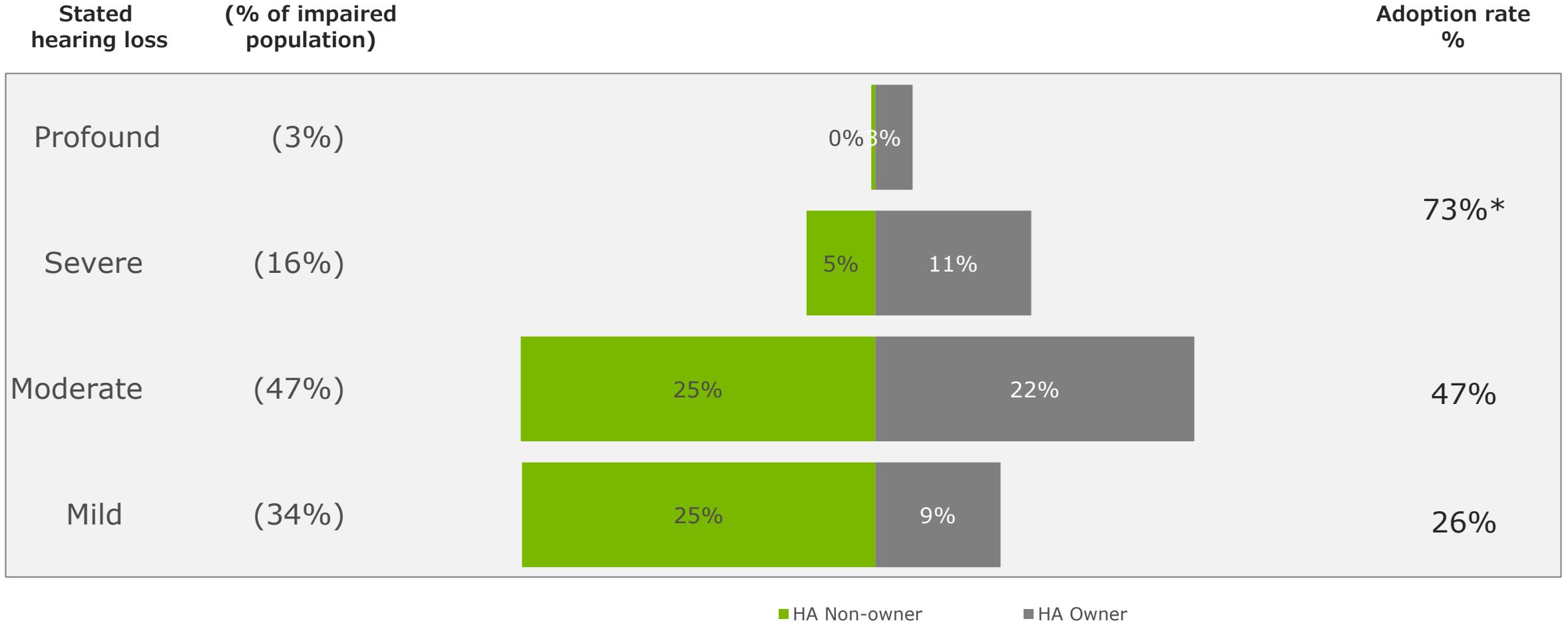


Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage





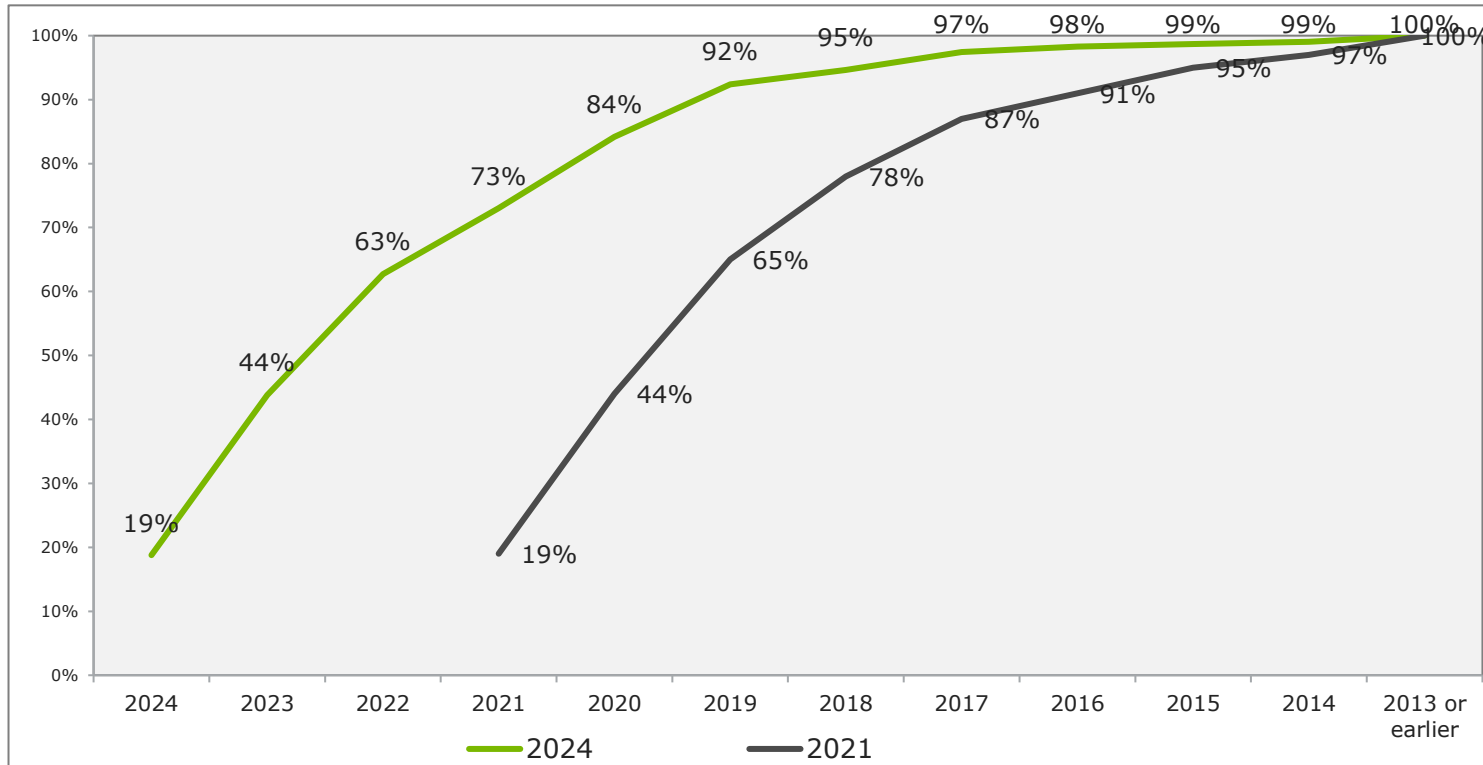
Low adoption rates within mild hearing loss





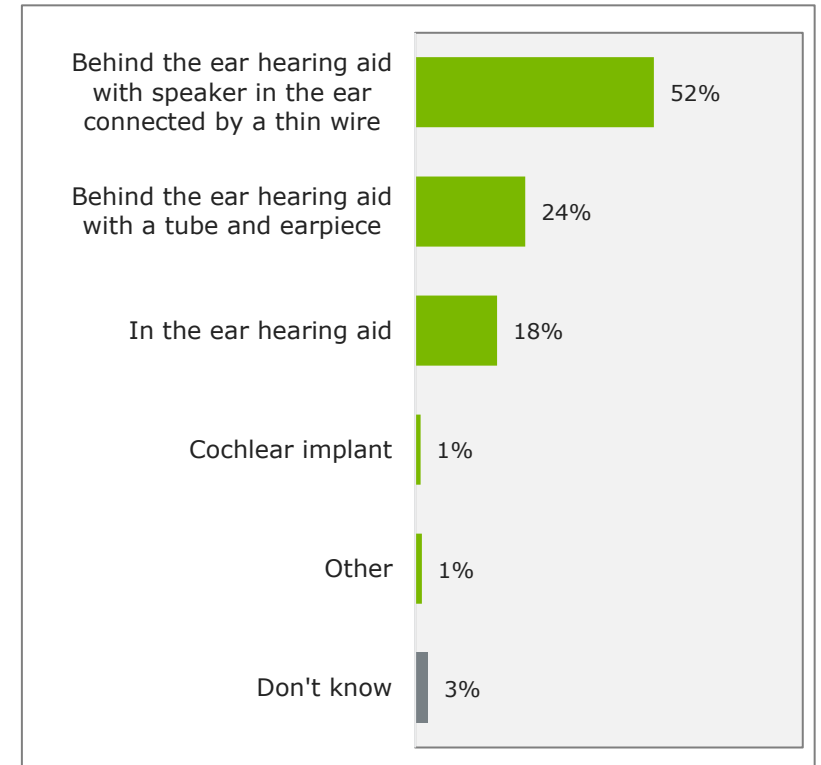
63% of the currently owned HAs were acquired in 2022 or later: RICs are the most often purchased type of HA

Year of purchase



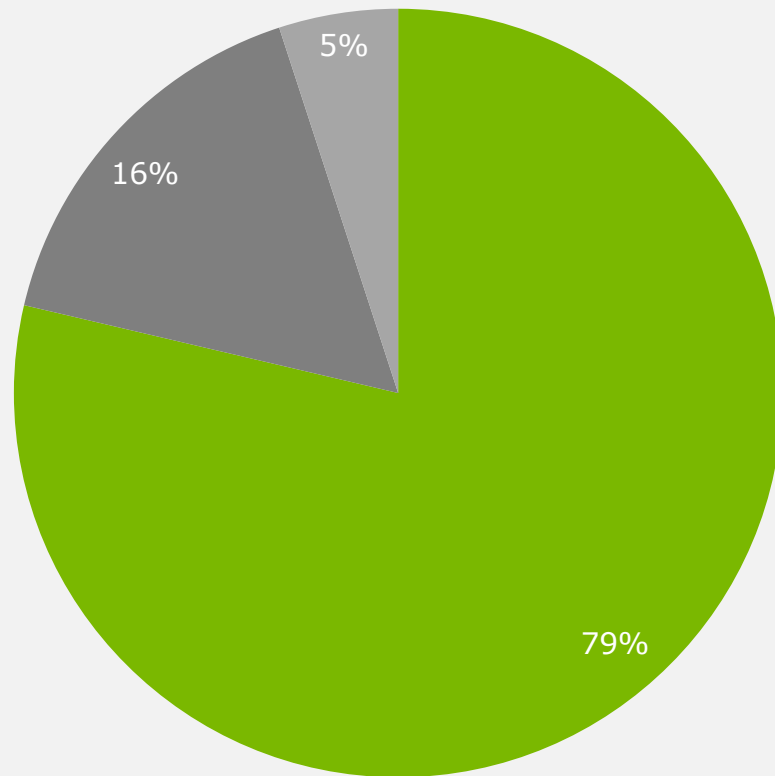
Age of currently owned HAs (Mean):
2024: 2.9 years
2021: 2.8 years

Type of HA



79% classify their hearing aids as medical devices

Would you classify your hearing aid as a...



■ A medical device that is sold and fitted by a hearing care professional

Overall satisfied: 80%
NPS: 29
n=486

■ A personal sound amplifier (PSAP, OTC hearing aid). This is a device that amplifies sound but is NOT fit by a hearing care professional.

Overall satisfied: 53%
NPS: -6
n=84

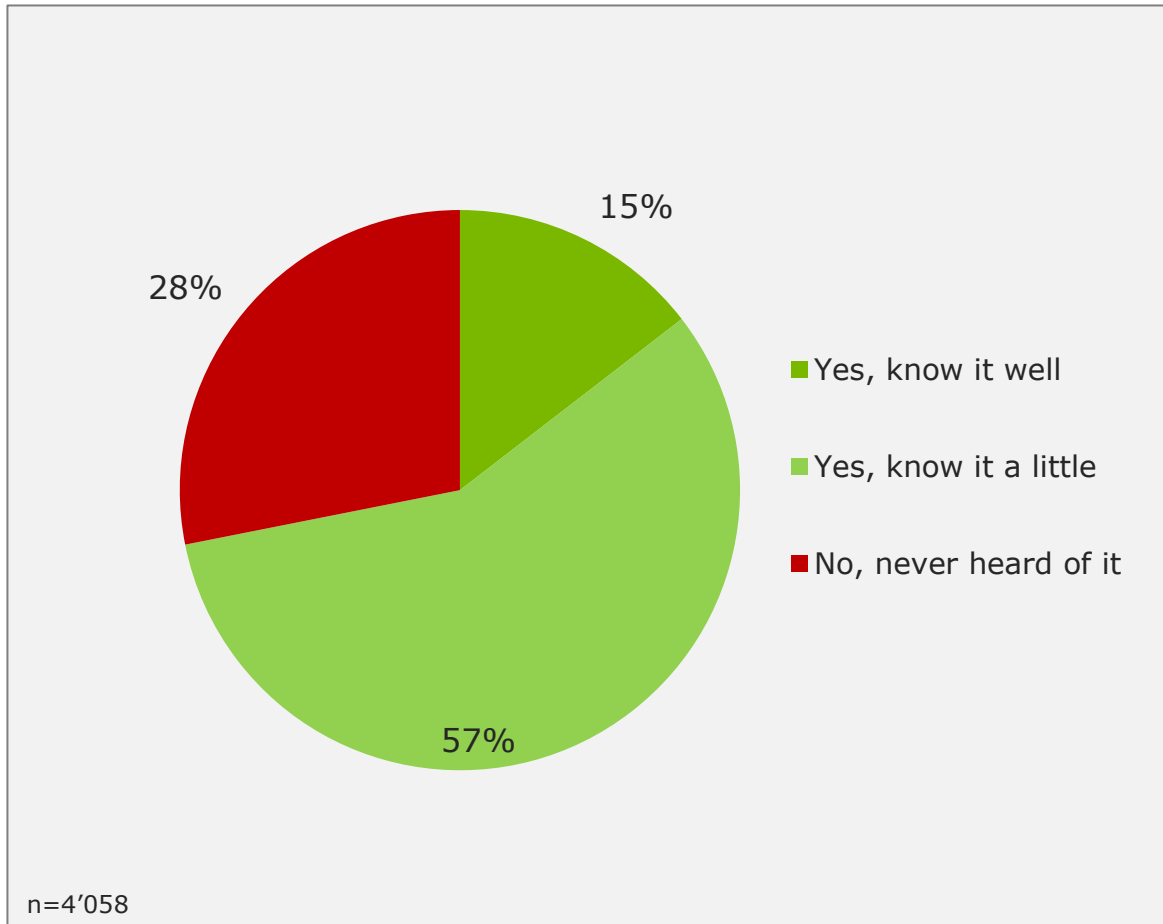
■ Don't know

HA Owner n=599

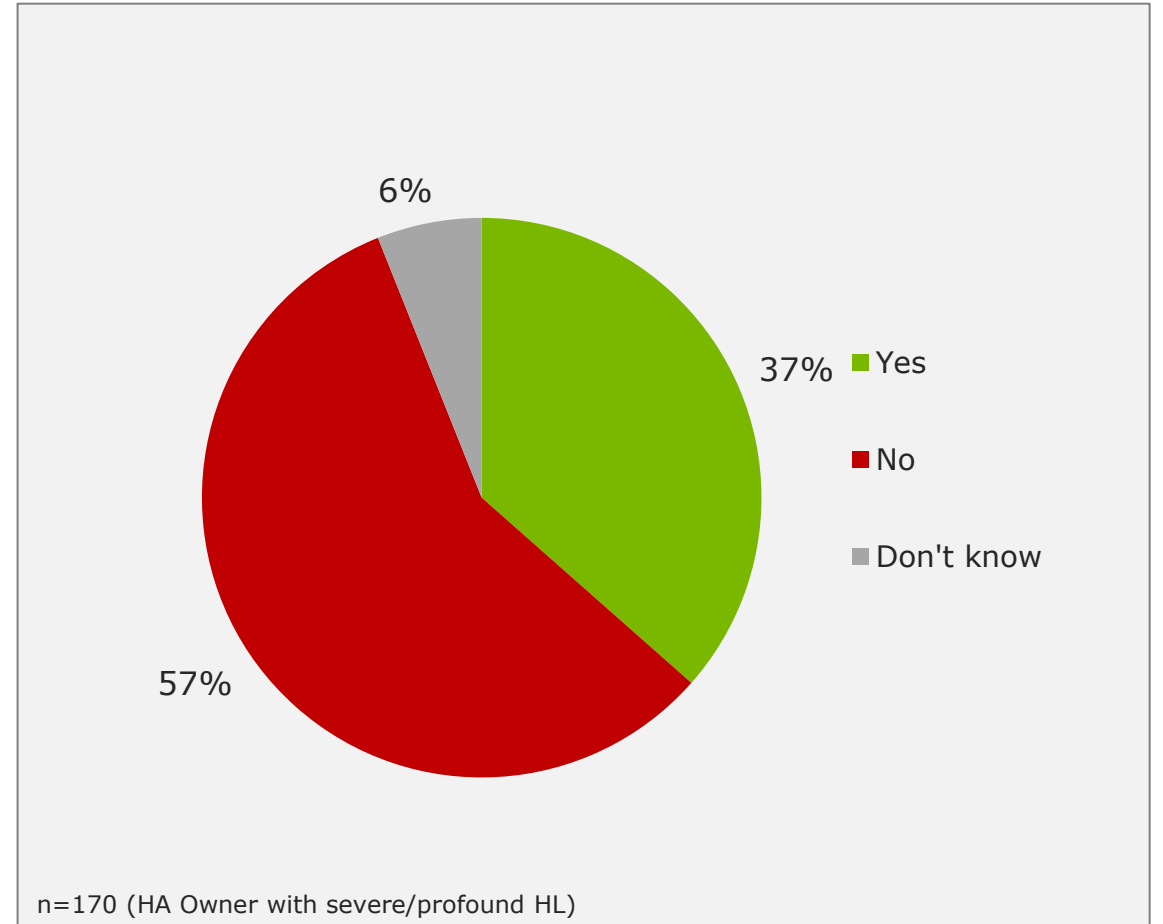


**Only 28% of the population in AUS have never heard of Cochlear Implants.
37% of the HA owners with severe/profound HL have been informed about CIs by a medical professional**

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



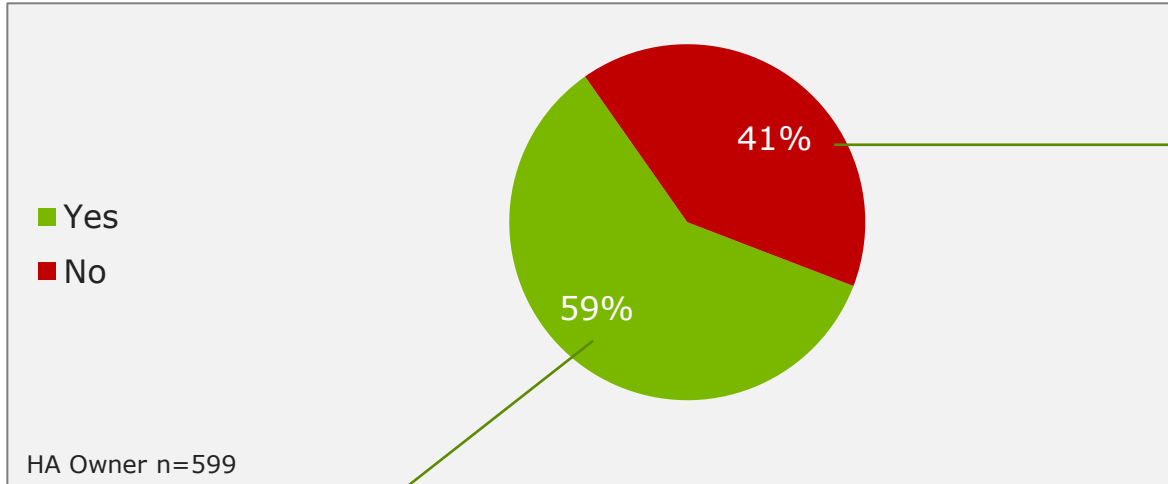
Have you been informed about cochlear implants by a medical professional?





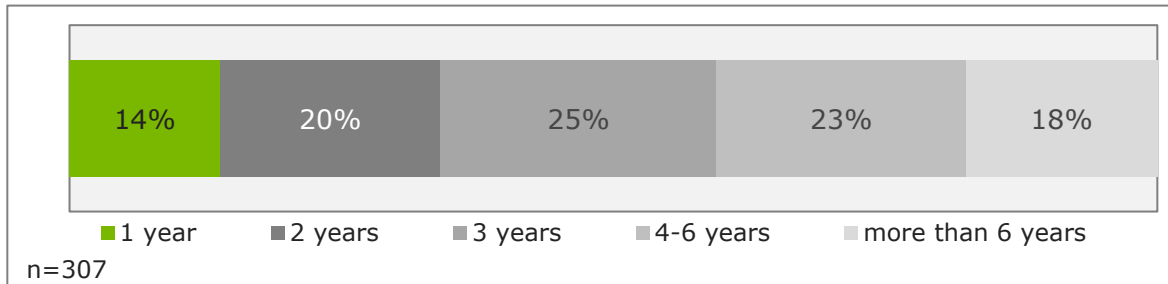
Hearing aids are used for five years before they are replaced. Mostly below 2-6 years pass between becoming aware of the hearing loss and purchasing hearing aids

Current HAs = first HAs?

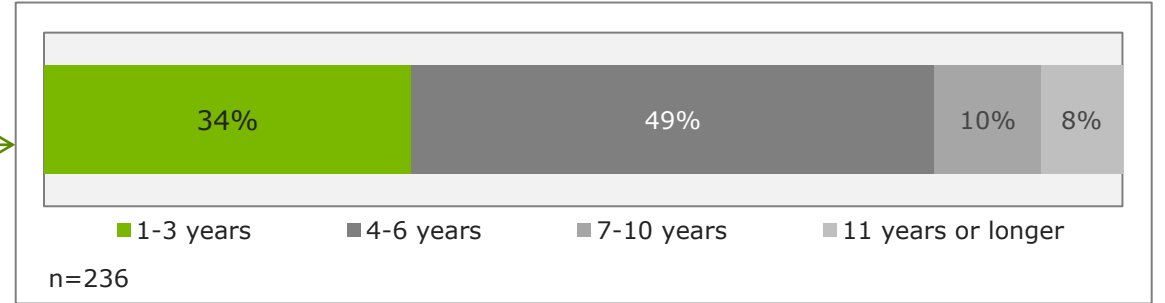


HA Owner (1st HA):

How many years have passed since you became aware of your hearing loss until you acquired a hearing aid?



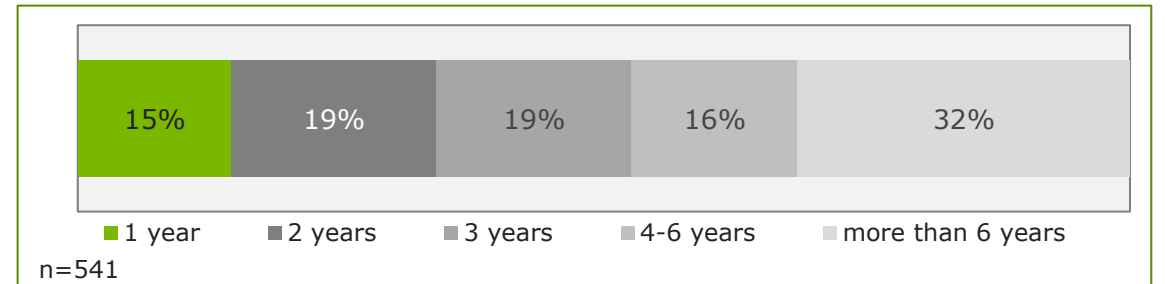
How many years did you own your previous HAs?



Age of HA before it has been replaced:
2024: 5 years (median)
2021: 5 years (median)

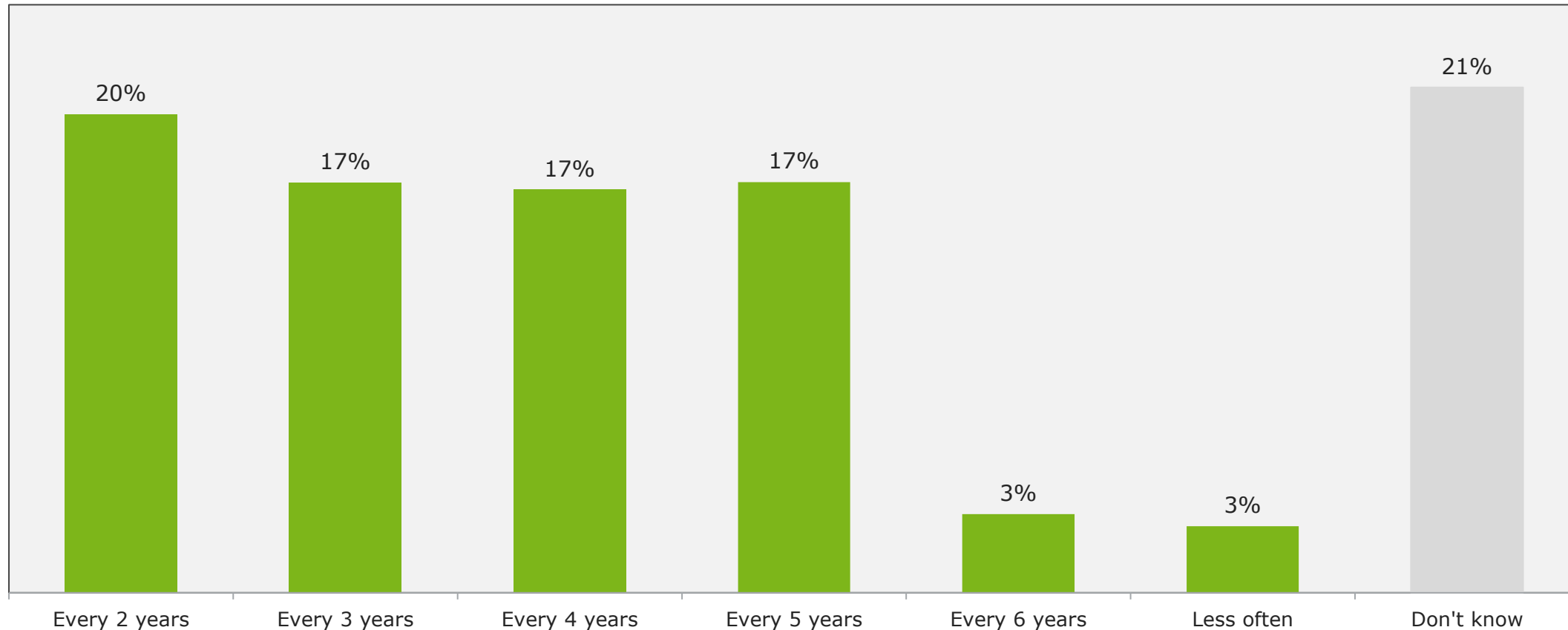
HA Non-owner:

How many years had passed since you became aware of your hearing loss?



37% of current owners think that their HAs should be upgraded to the latest technology every 2-3 years

With technology advancing so quickly , how often do you believe that you need to upgrade your hearing aid to the latest technology?

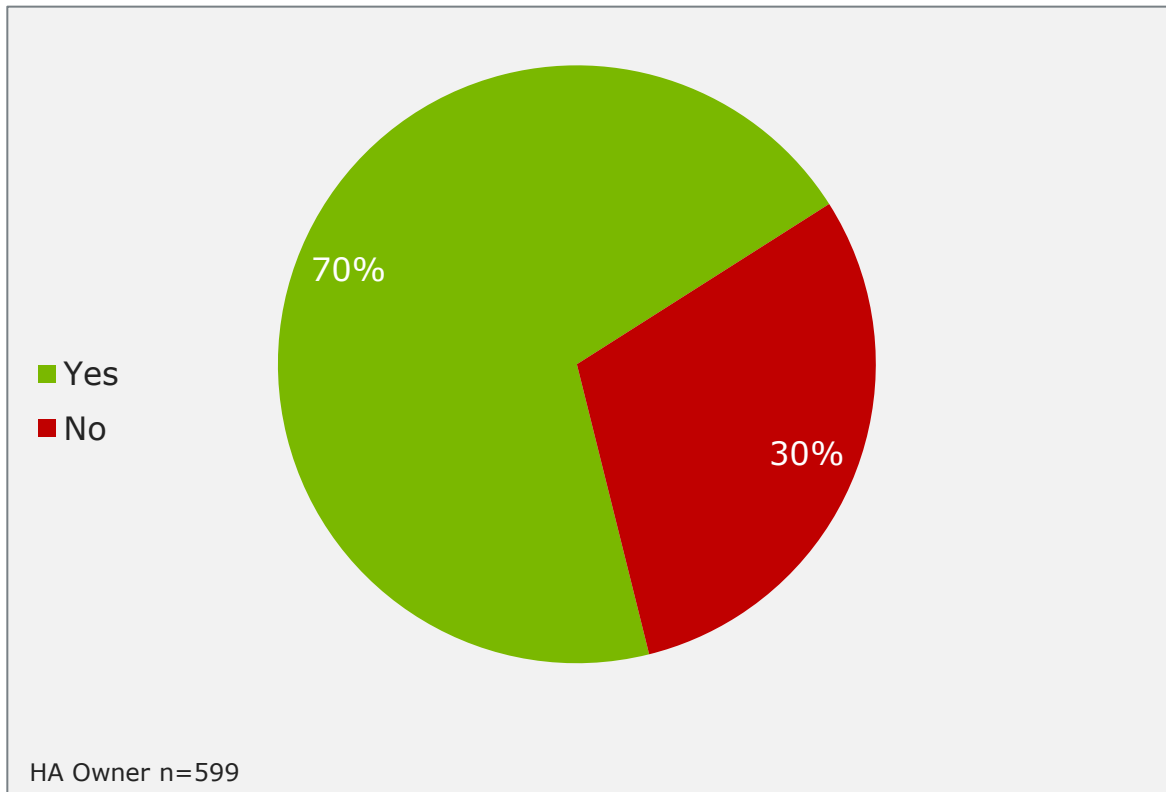


HA Owner n=599



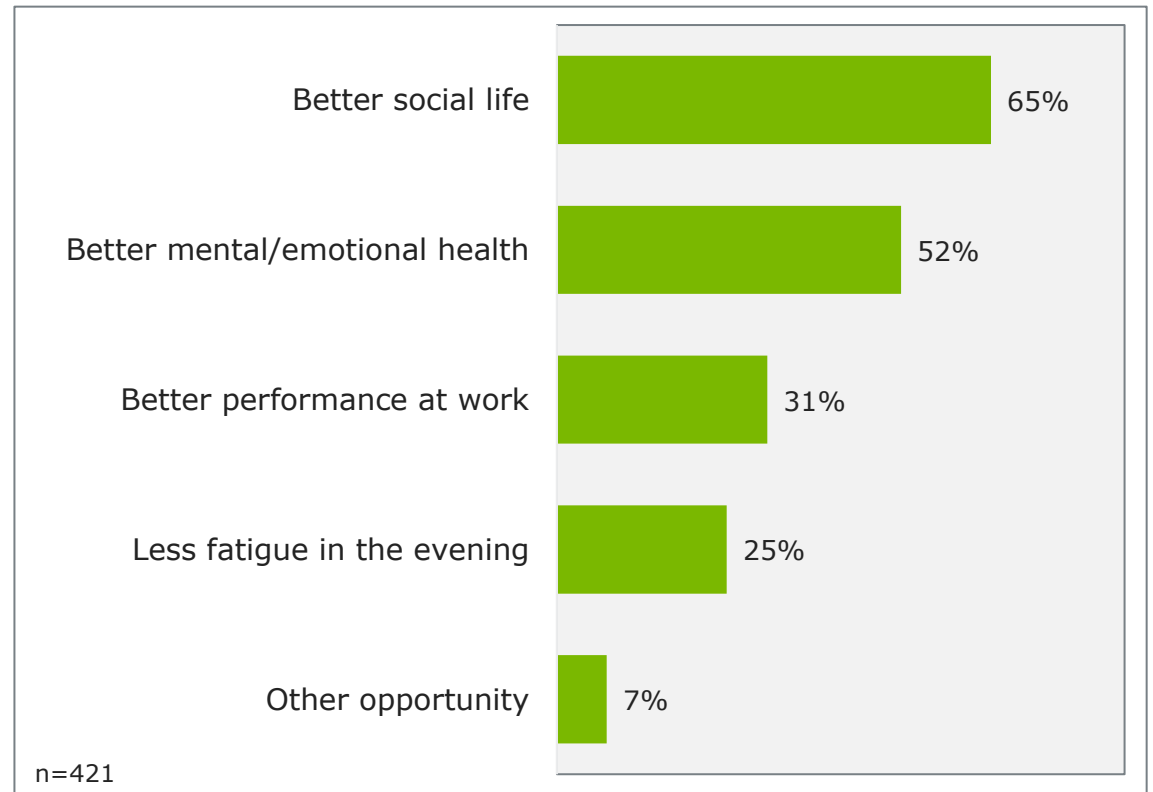
70% of all HA owners think they should have gotten their HAs sooner! The main reason is missing out on social life and mental/emotional health

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.

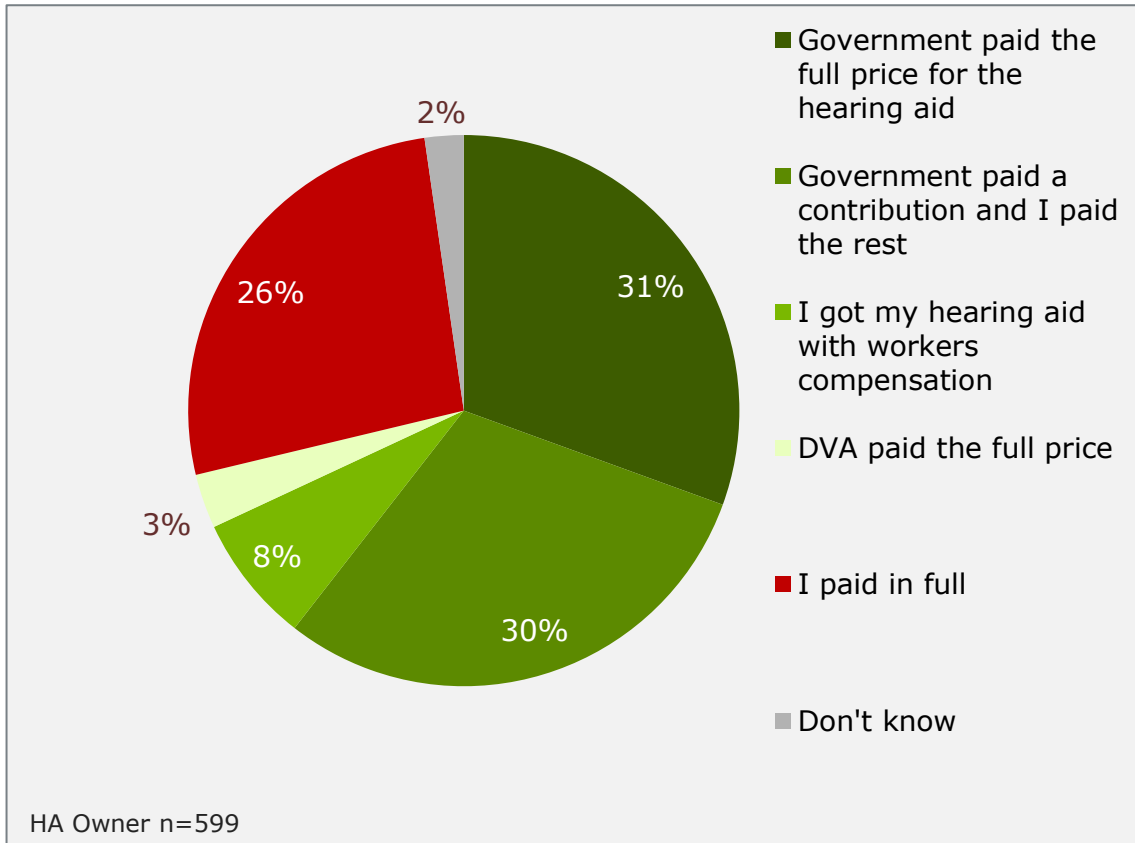




**71% of hearing aid owners received third-party reimbursement.
Only 24% of the hearing impaired without hearing aids think that a third party would pay for any part of hearing aids**

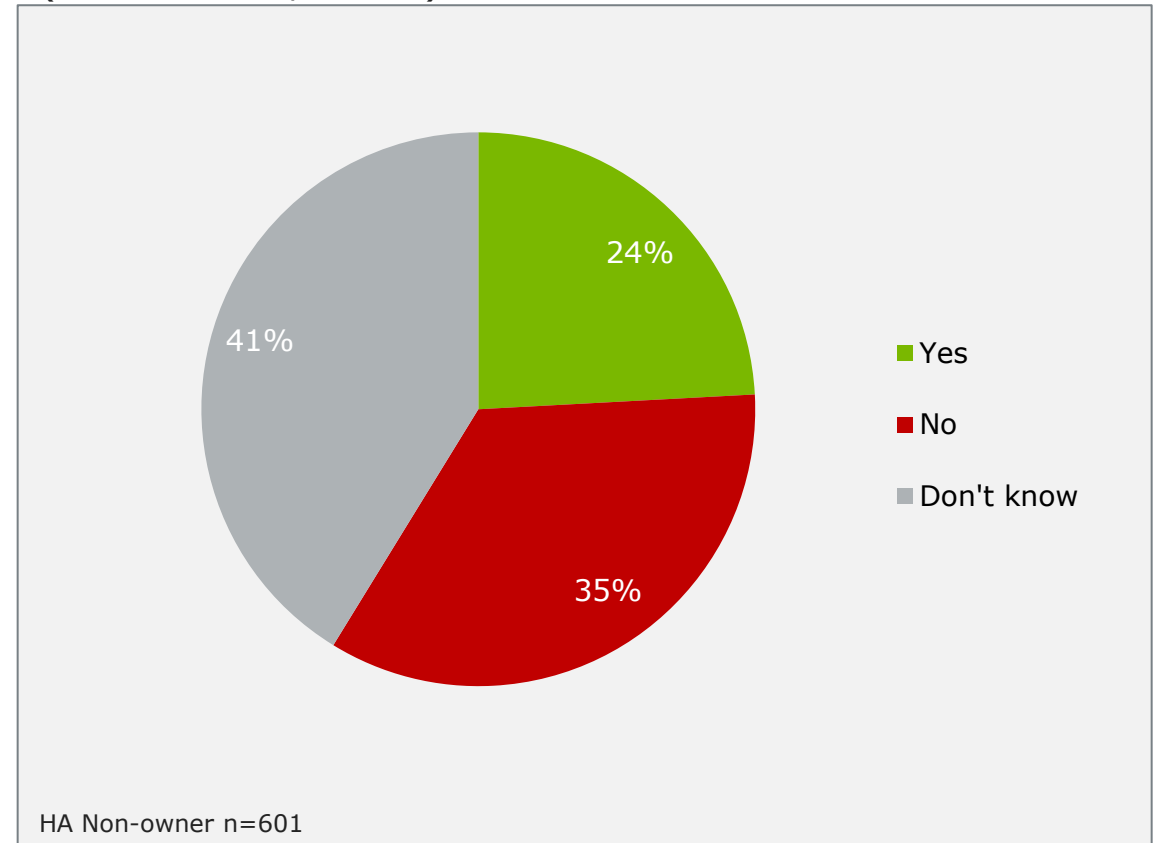
HA Owner:

For the purchase of your hearing aid and for hearing services, which of these best describes how you paid for them?



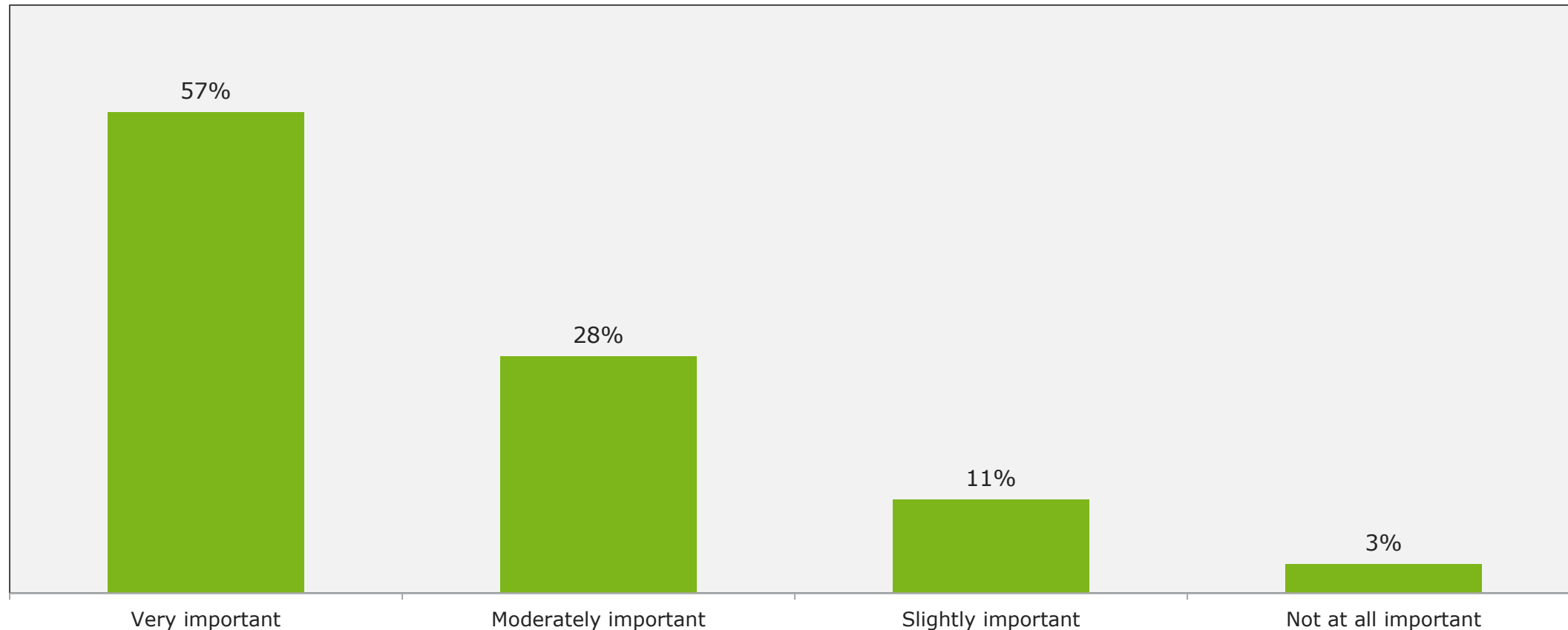
HA Non-owner:

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



Choice to self-fund on top of the government subsidy is seen as very or moderately important by 85% of the hearing impaired

How important do you think it is that pensioners have the choice to self-fund on top of the government subsidy, if they wish to access more advanced hearing aid features?

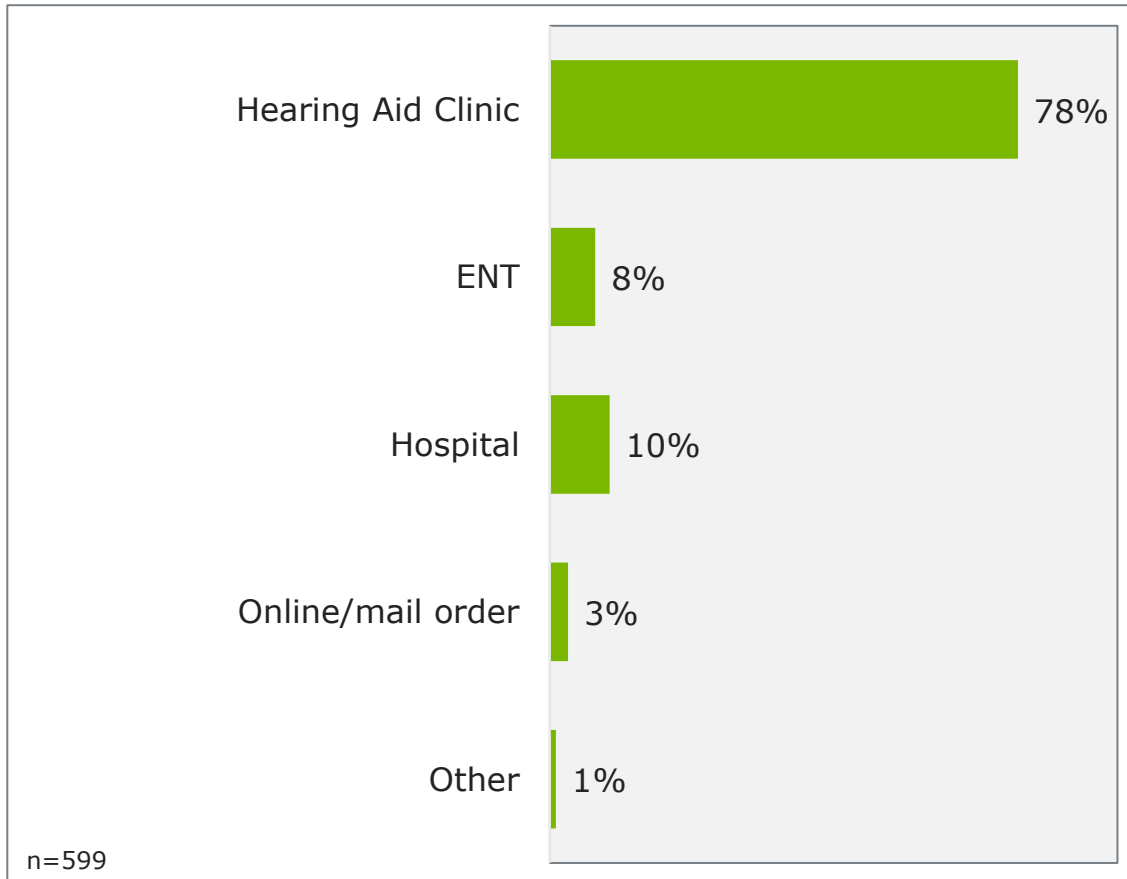


Hearing impaired, n=1200

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

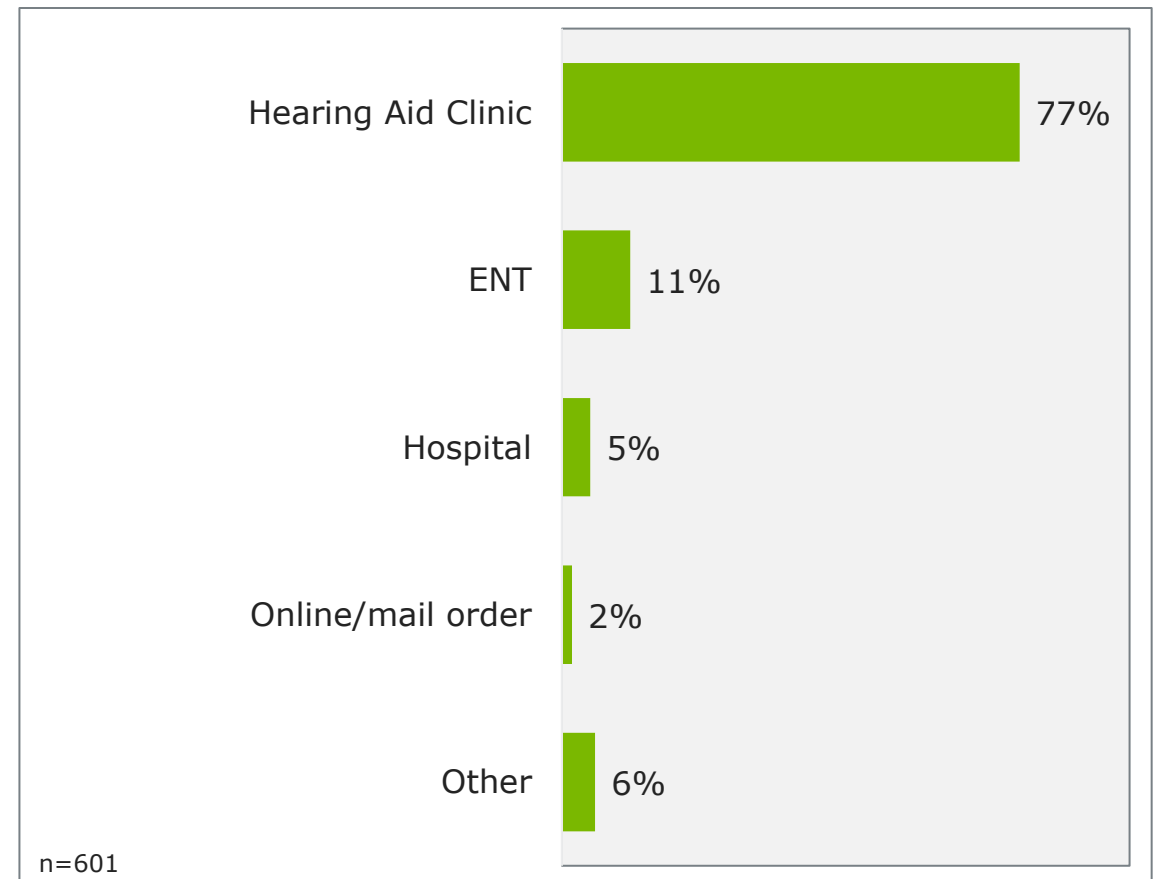
HA Owner:

Where was your most current hearing aid obtained?



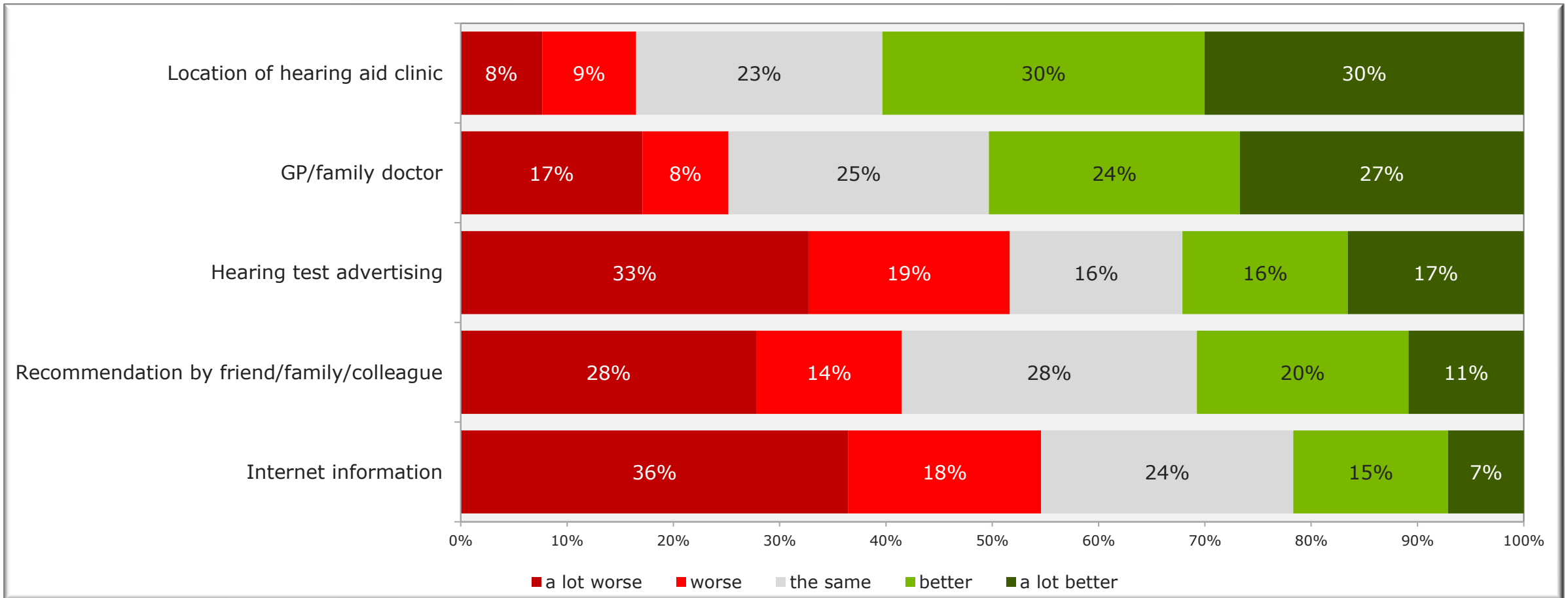
HA Non-owner:

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



Location and GP were most important factors for choosing the hearing aid clinic

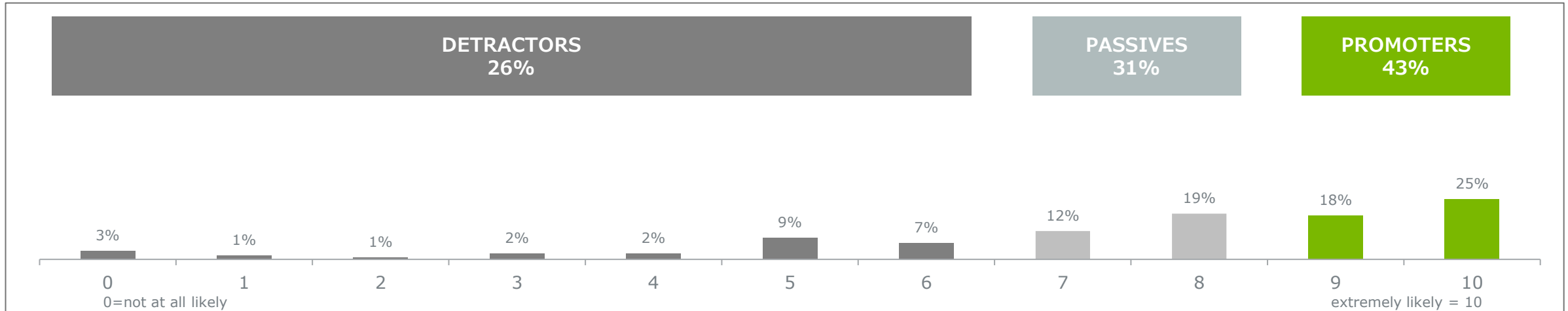
How important were the following factors in your decision to choose your hearing aid clinic?





Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 17

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

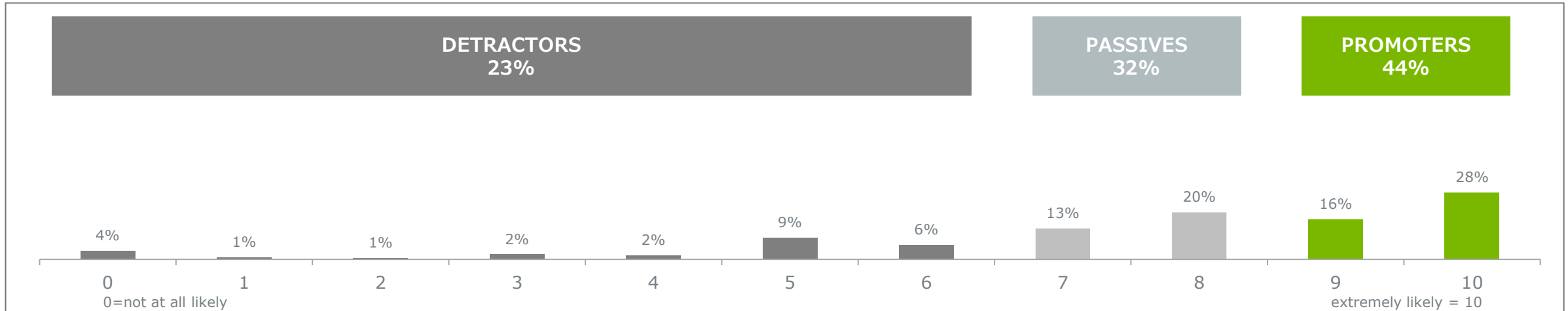


NPS = PROMOTERS – DETRACTORS = 17 (2021: 26) (exact figure rounded)



Recommendation hearing aids: Positive NPS score of 21

And how likely would you be to recommend hearing aids to a friend or colleague?



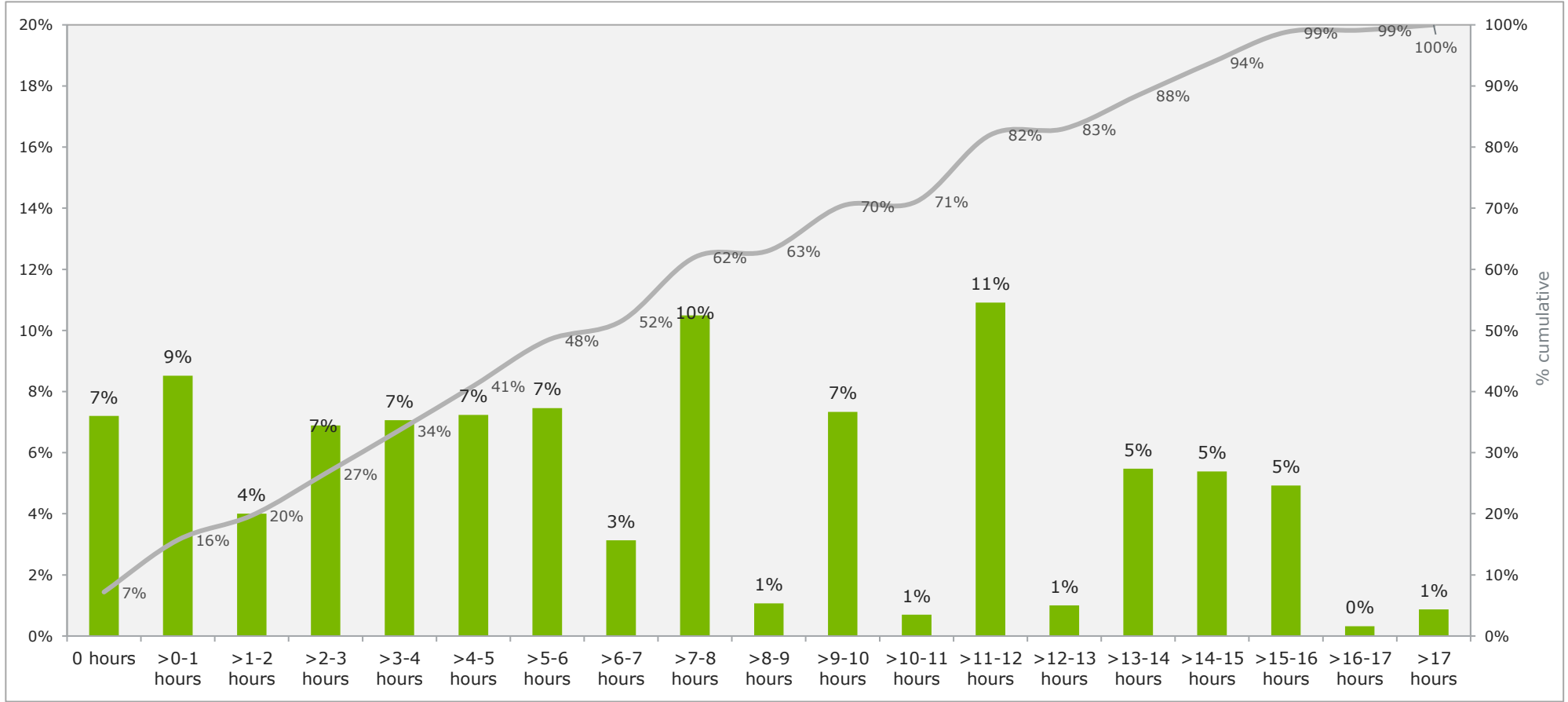
NPS = PROMOTERS – DETRACTORS = 21 (2021: 24) (exact figure rounded)





On average, HAs are worn 7.4 hours a day

How many hours a day are HA worn?



HA worn:
 2024 Mean: 7.4 hours/day
 2021 Mean: 6.8 hours/day

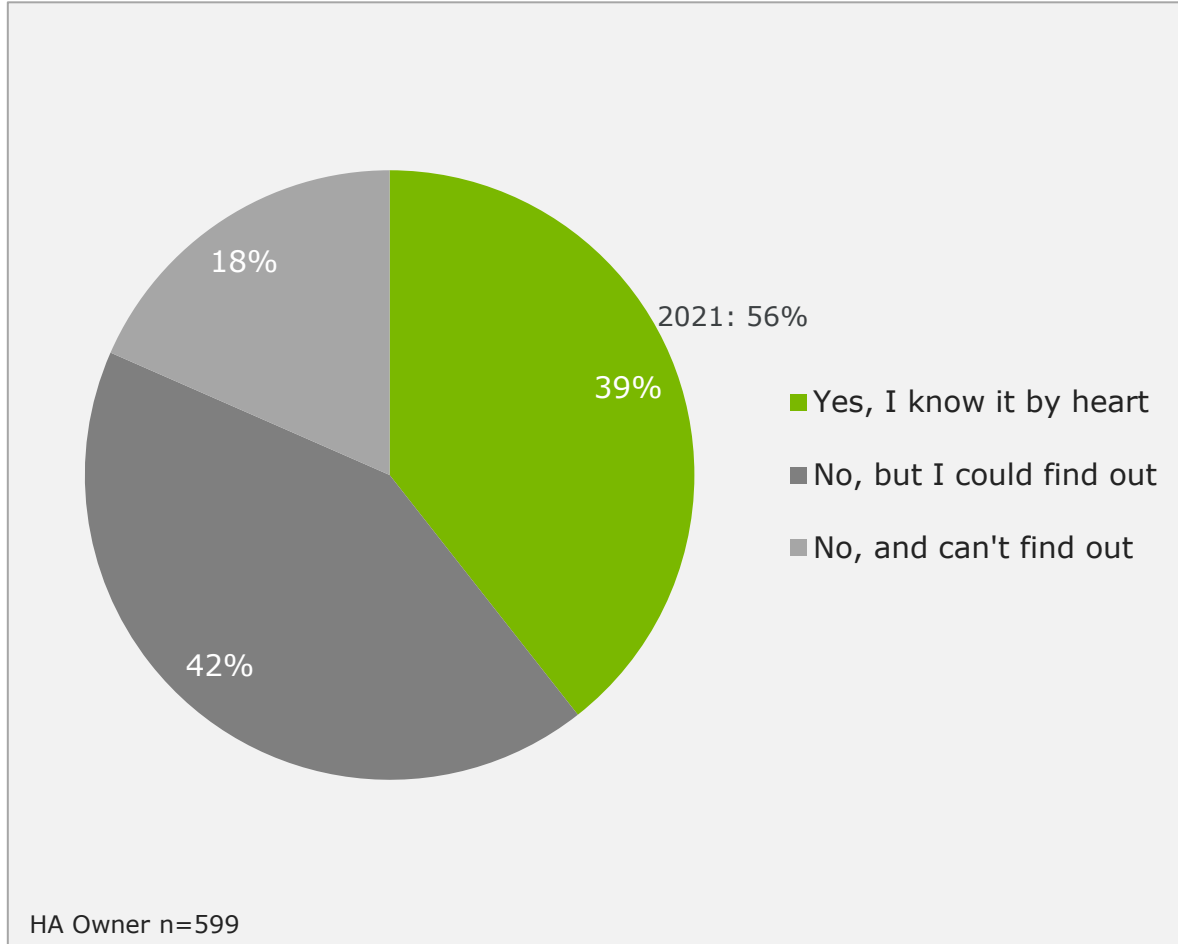
In the drawer (0 hours):
 2024: 7%
 2021: 8%

HA Owner n=599



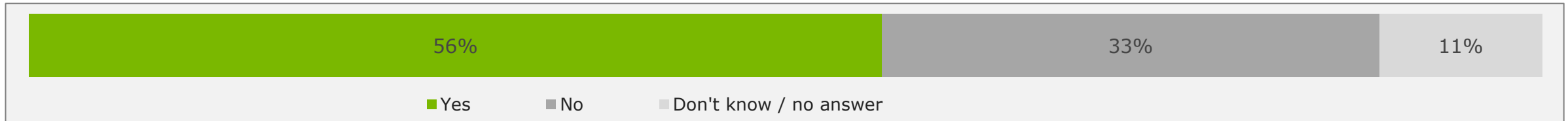
39% of today's hearing aid owners are aware of their hearing aid brand

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



56% of the HA owners use a hearing aid app (trend increasing), and 75% are satisfied with it

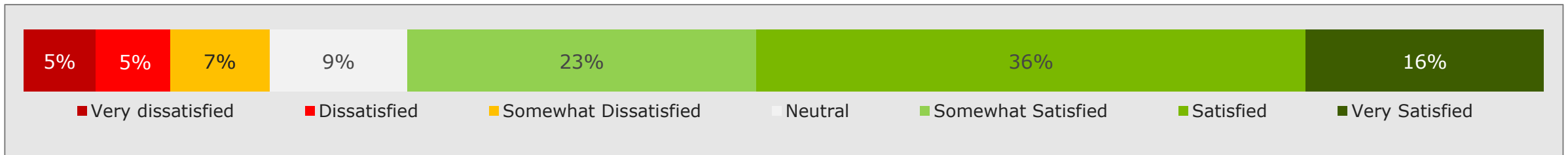
Have you been informed by your hearing care professional about hearing aid apps?
(HA Owner n=599)



Do you personally use apps for your hearing aids?
(HA Owner n=599)

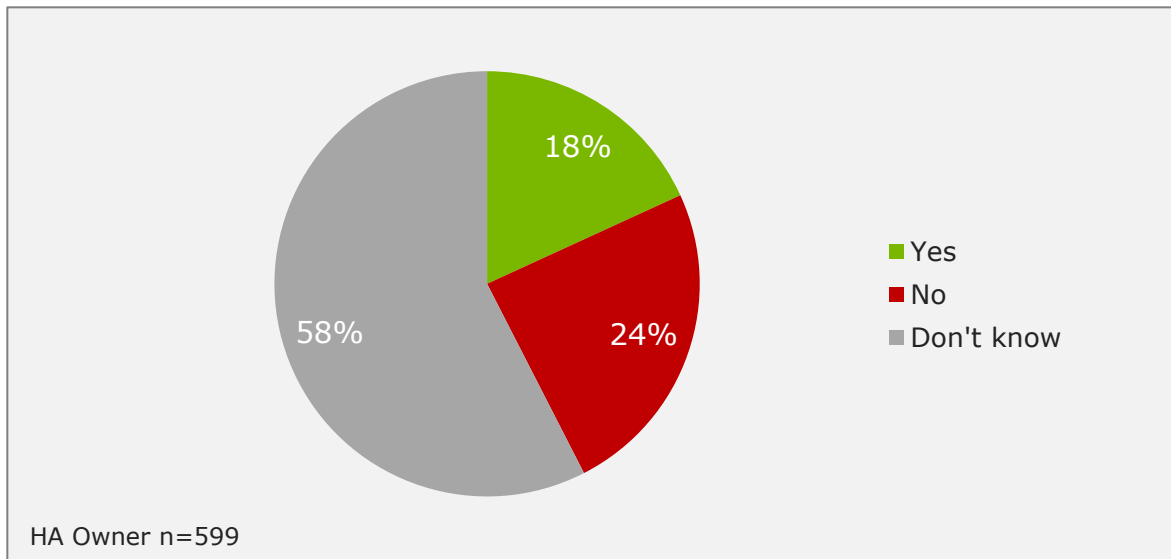


IF APPS USED (n=249):
Overall, how satisfied with the performance of your apps?

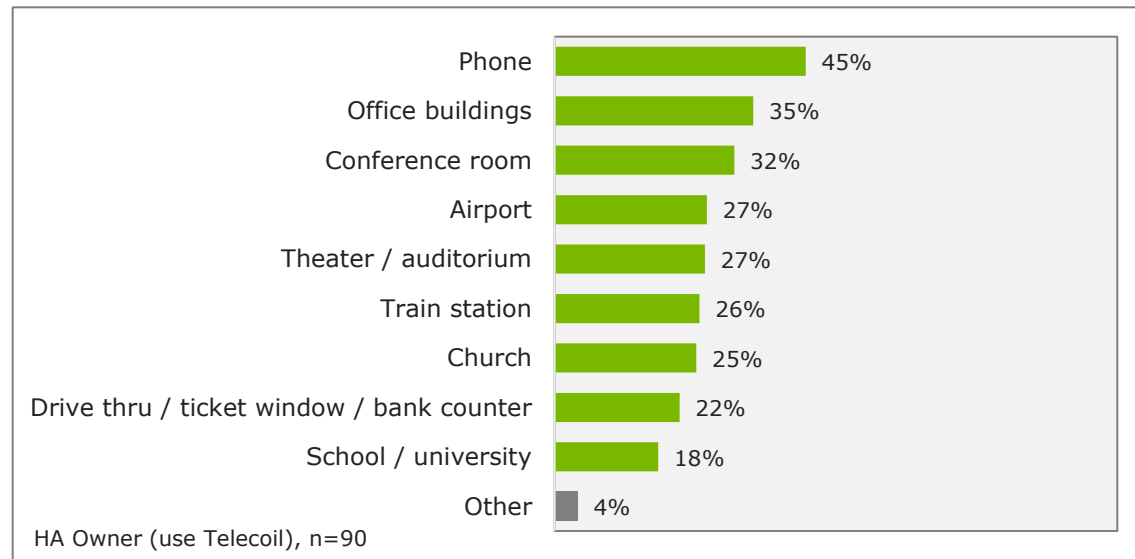


18% of the HAs are (to the knowledge of the owners) equipped with Telecoil – the main usage of Telecoil is in the phone

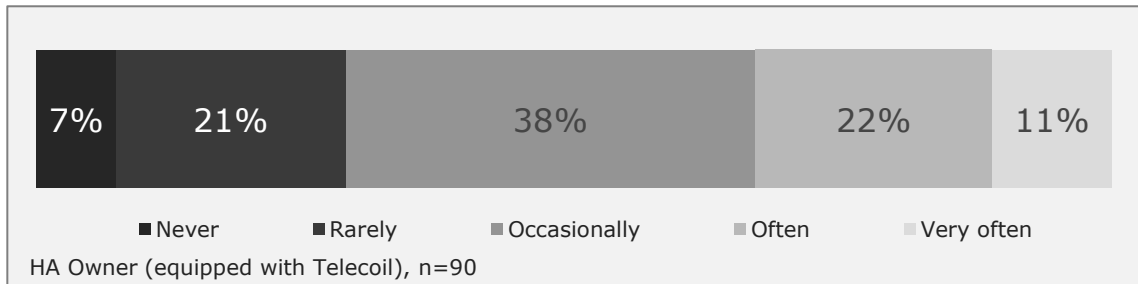
Are your hearing aids equipped with Telecoil?



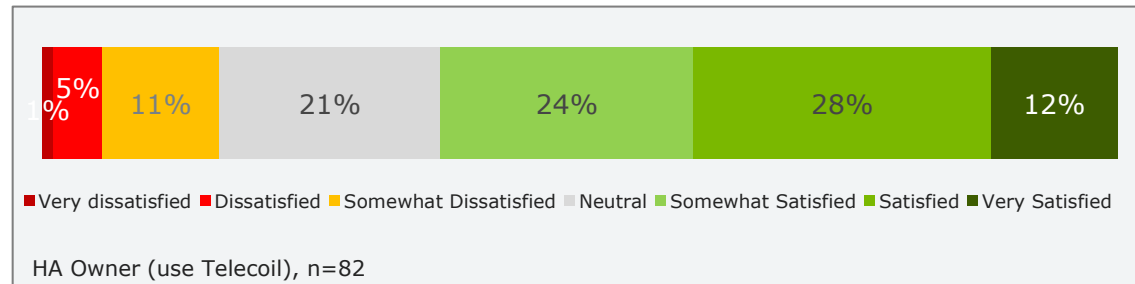
Where do you use your telecoil to improve your hearing?



How often do you use the telecoil to improve your hearing?



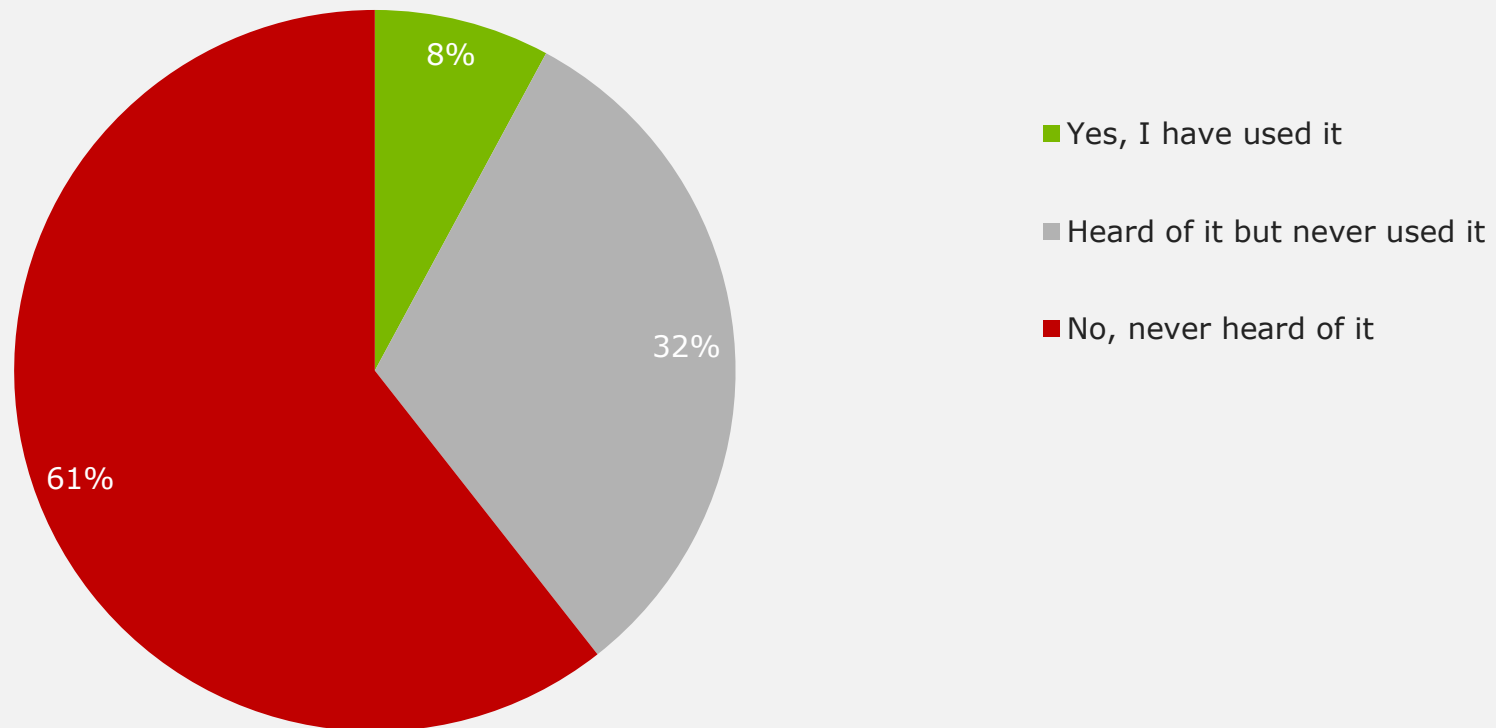
How satisfied are you with the telecoil option?



8% of the HA owners have already used remote fitting, 32% have at least heard of it, and 61% 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)



HA Owner n=599



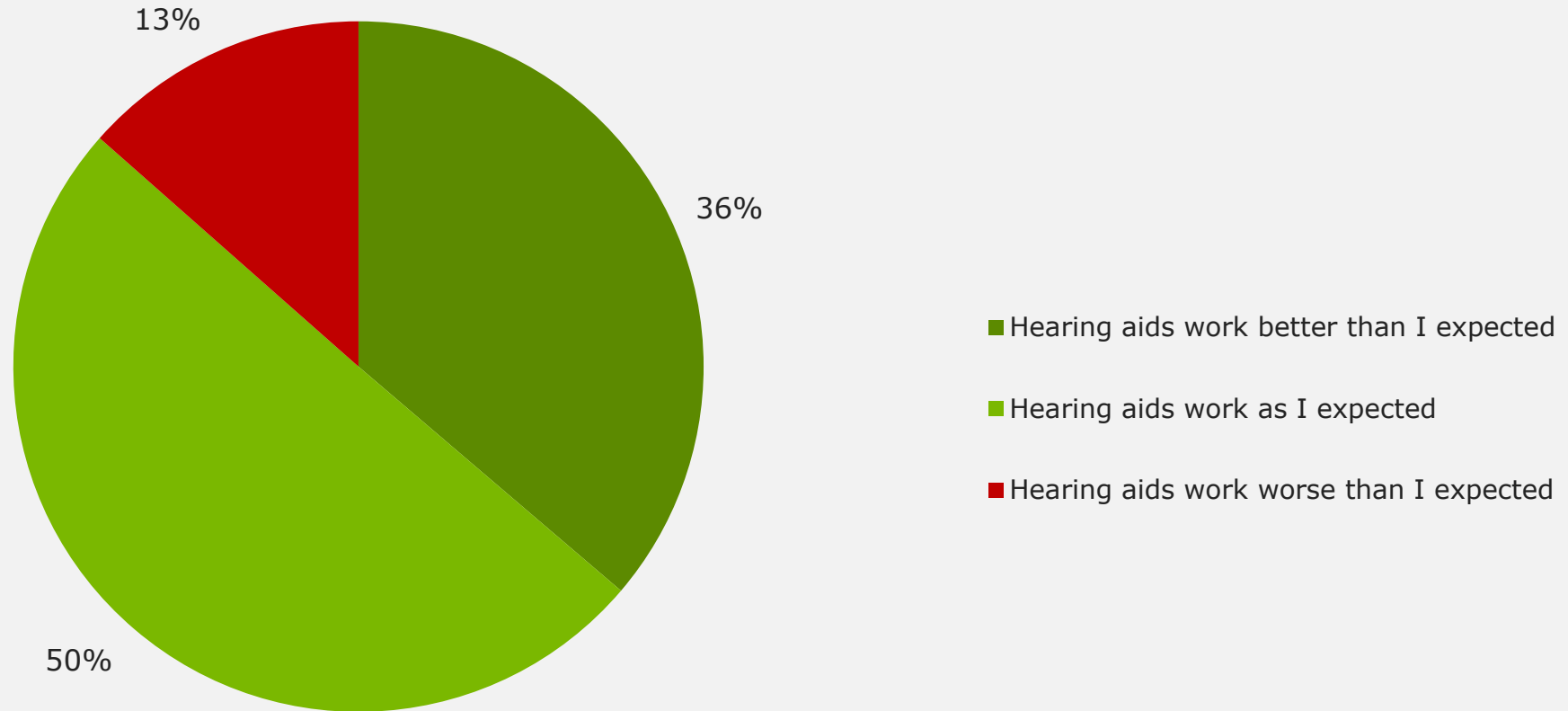


Satisfaction with hearing aids and drivers



87% 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?

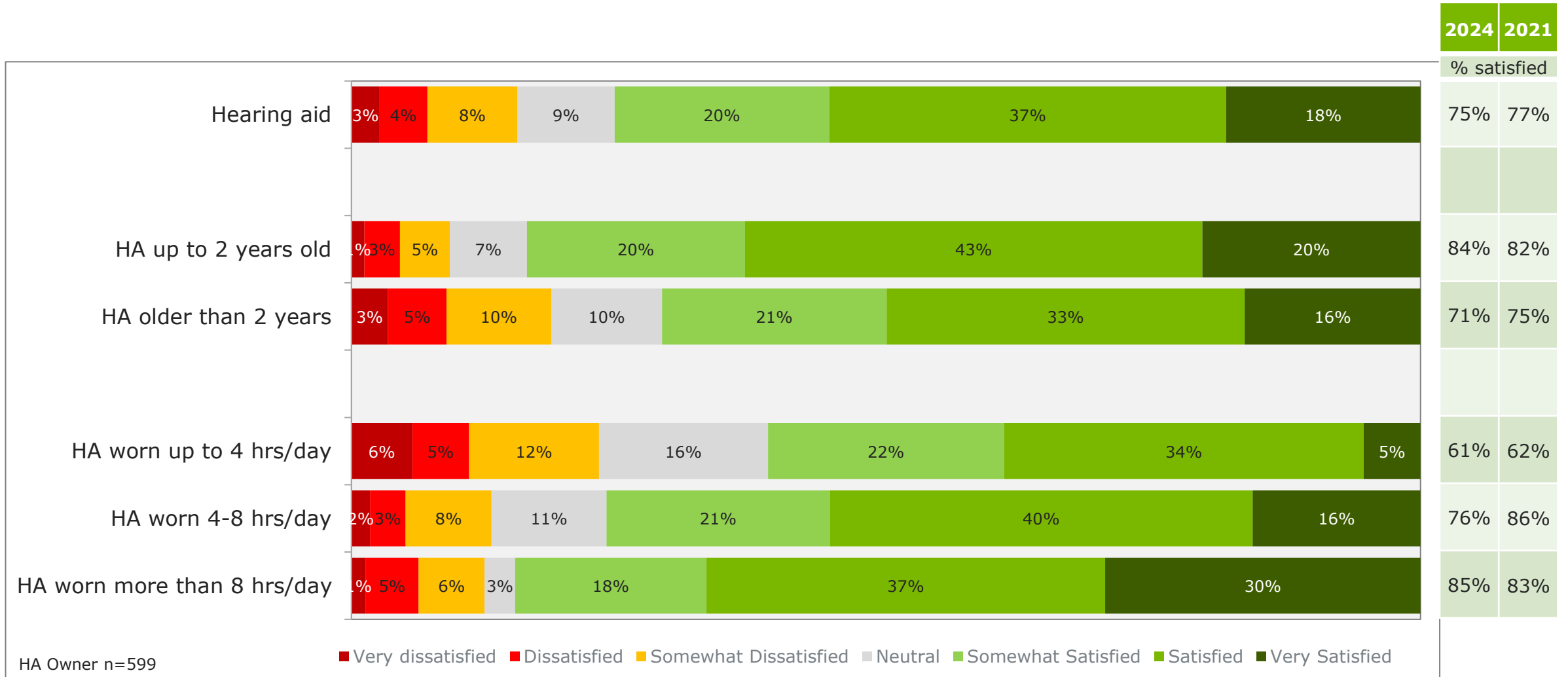


HA Owner n=599

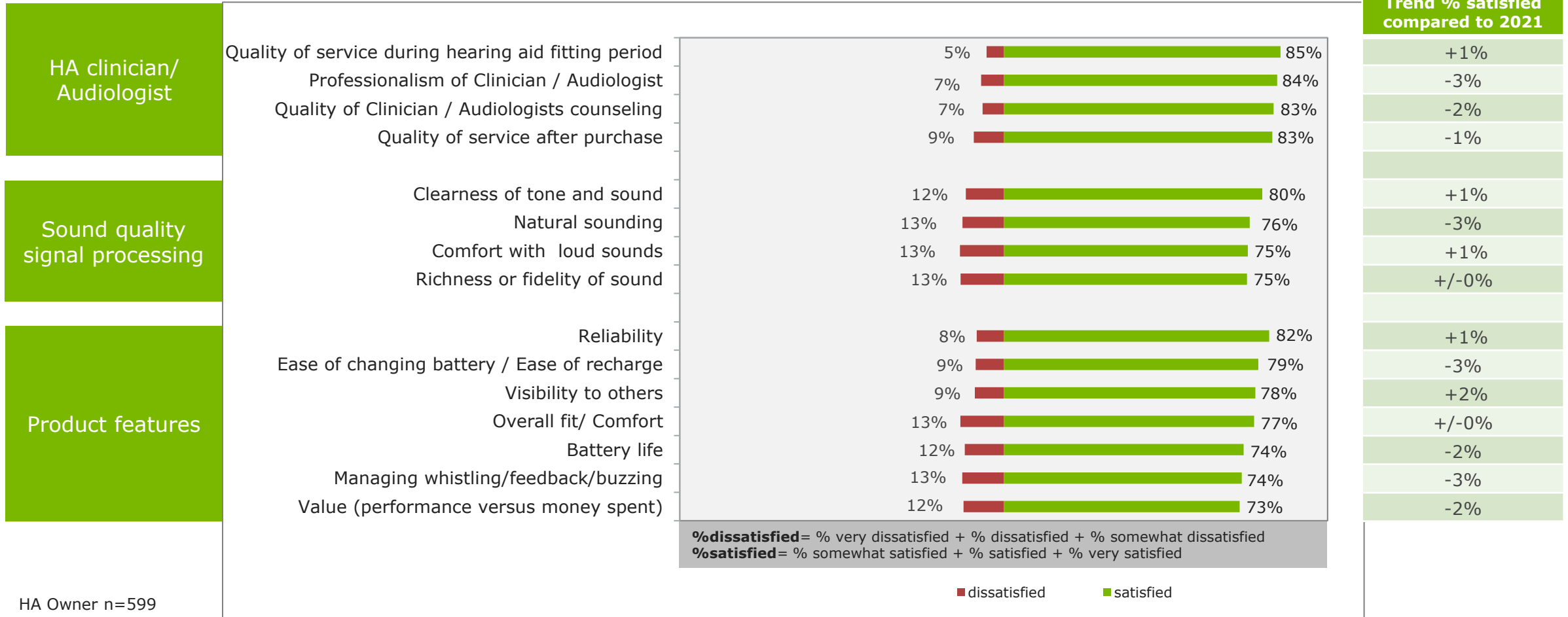




Overall satisfaction with HA: 75% of hearing aid owners are satisfied with their hearing aid(s)



Satisfaction with current hearing aids

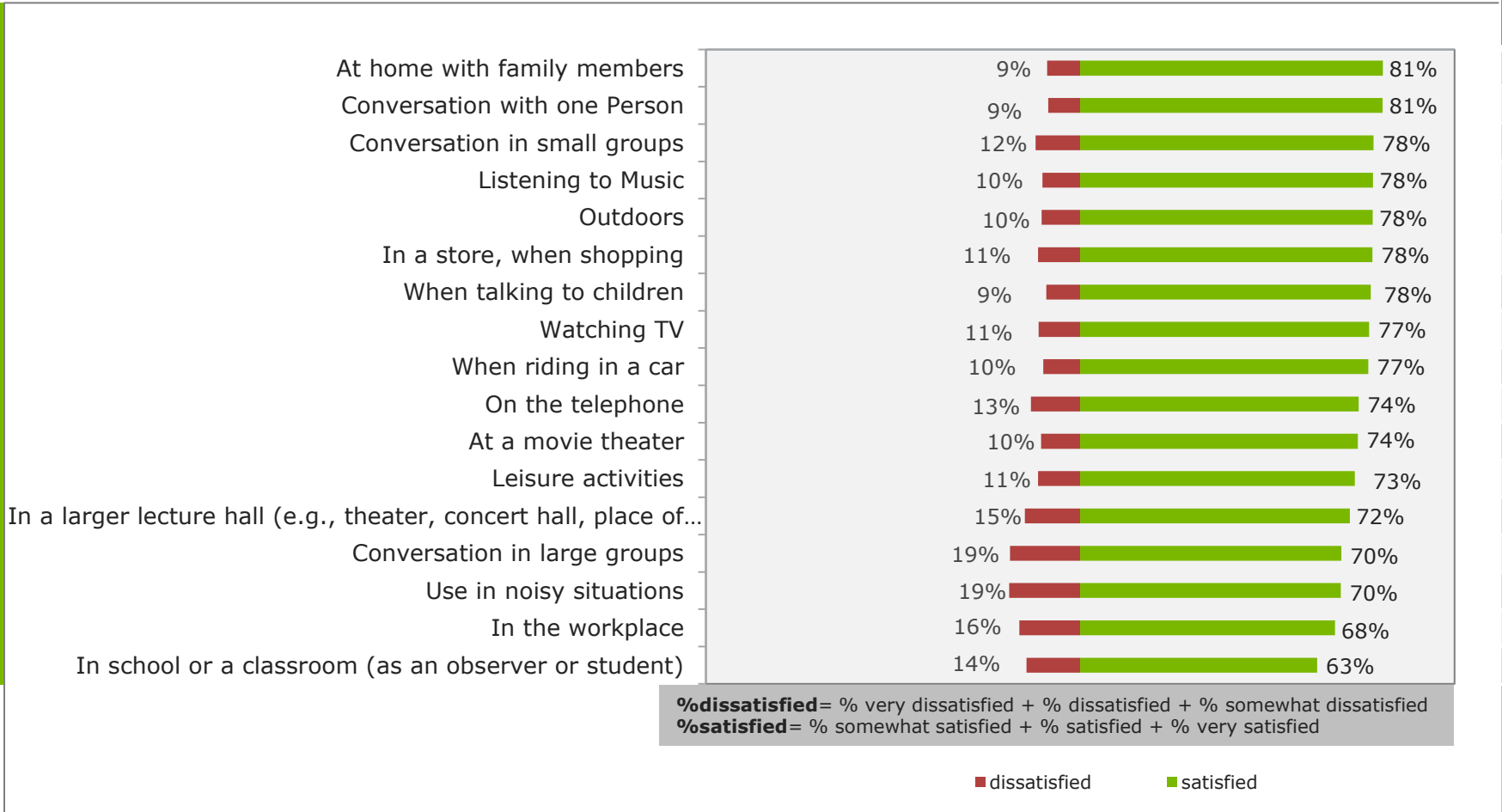


HA Owner n=599



Satisfaction with current hearing aids

Listening situations



Trend % satisfied compared to 2021

+1%
-2%
-2%
-3%
-2%
+/-0%
+1%
-2%
-2%
-4%
-5%
-6%
-4%
-3%
-1%
-9%
-10%



The key factors influencing satisfaction with hearing aids are sound clarity, fidelity, comfort with loud sounds, natural sounding, and reliability

		Influence on overall satisfaction with HA*
HA clinician / Audiologist	Quality of service after purchase	0.57
	Quality of service during hearing aid fitting period	0.54
	Quality of Hearing Aid Clinicians / Audiologists counseling	0.52
	Professionalism of Hearing Aid Clinician / Audiologist	0.51
Sound quality signal processing	Clearness of tone and sound	0.69
	Natural sounding	0.67
	Richness or fidelity of sound	0.66
	Comfort with loud sounds	0.64
Product features	Overall fit/ Comfort	0.66
	Reliability	0.65
	Visibility to others	0.59
	Managing whistling/feedback/buzzing	0.59
	Ease of changing battery / Ease of recharge	0.56
	Value (performance versus money spent)	0.54
	Battery life	0.46

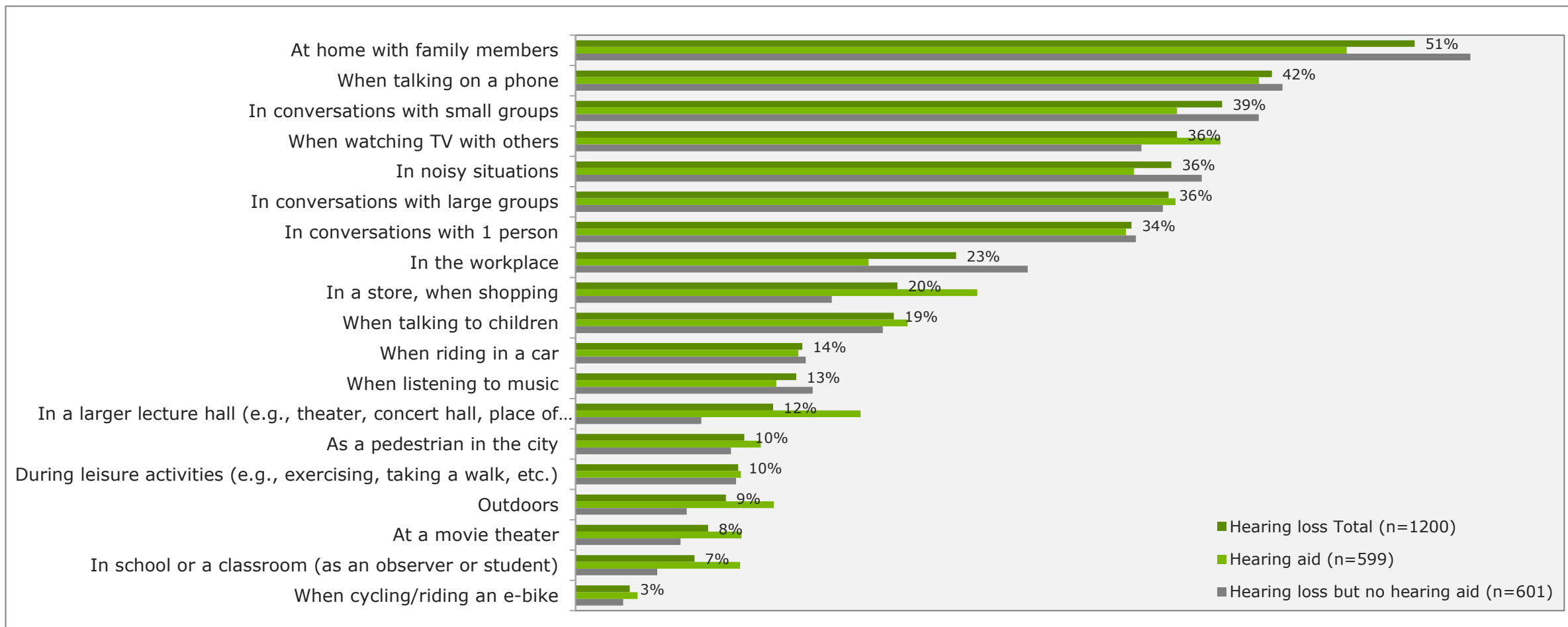
*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction, 1 means a maximal relationship.





The most important listening situations are talking with family at home, phone conversations, and small group conversations

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





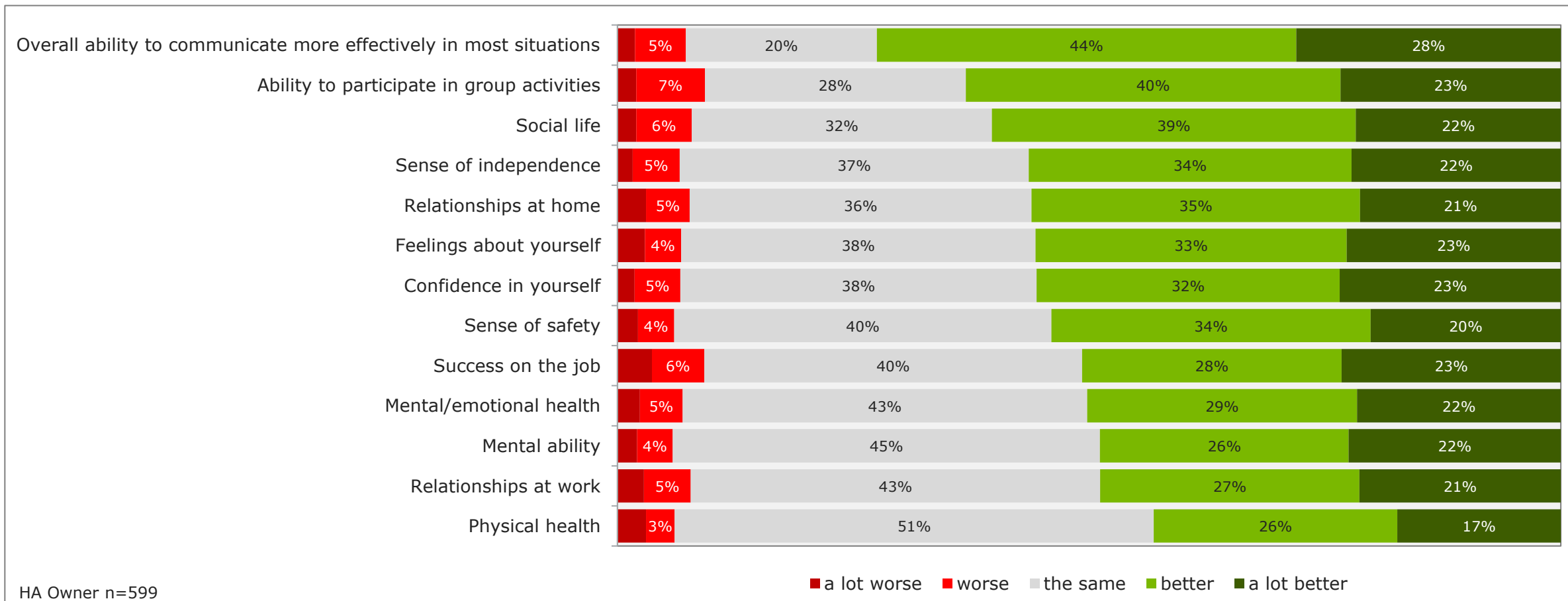
Positive impact of hearing aids, quality of life





Hearing aids positively impact communication abilities, social participation, and more

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).



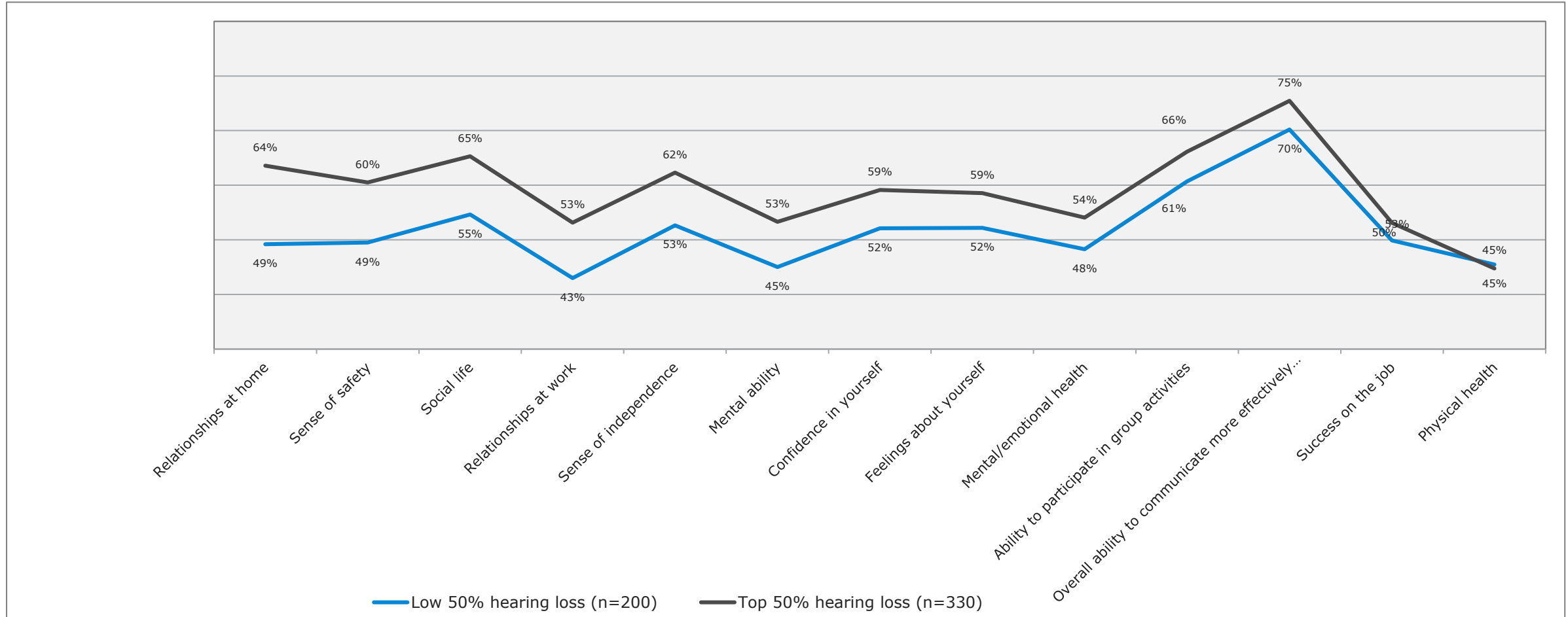
HA Owner n=599





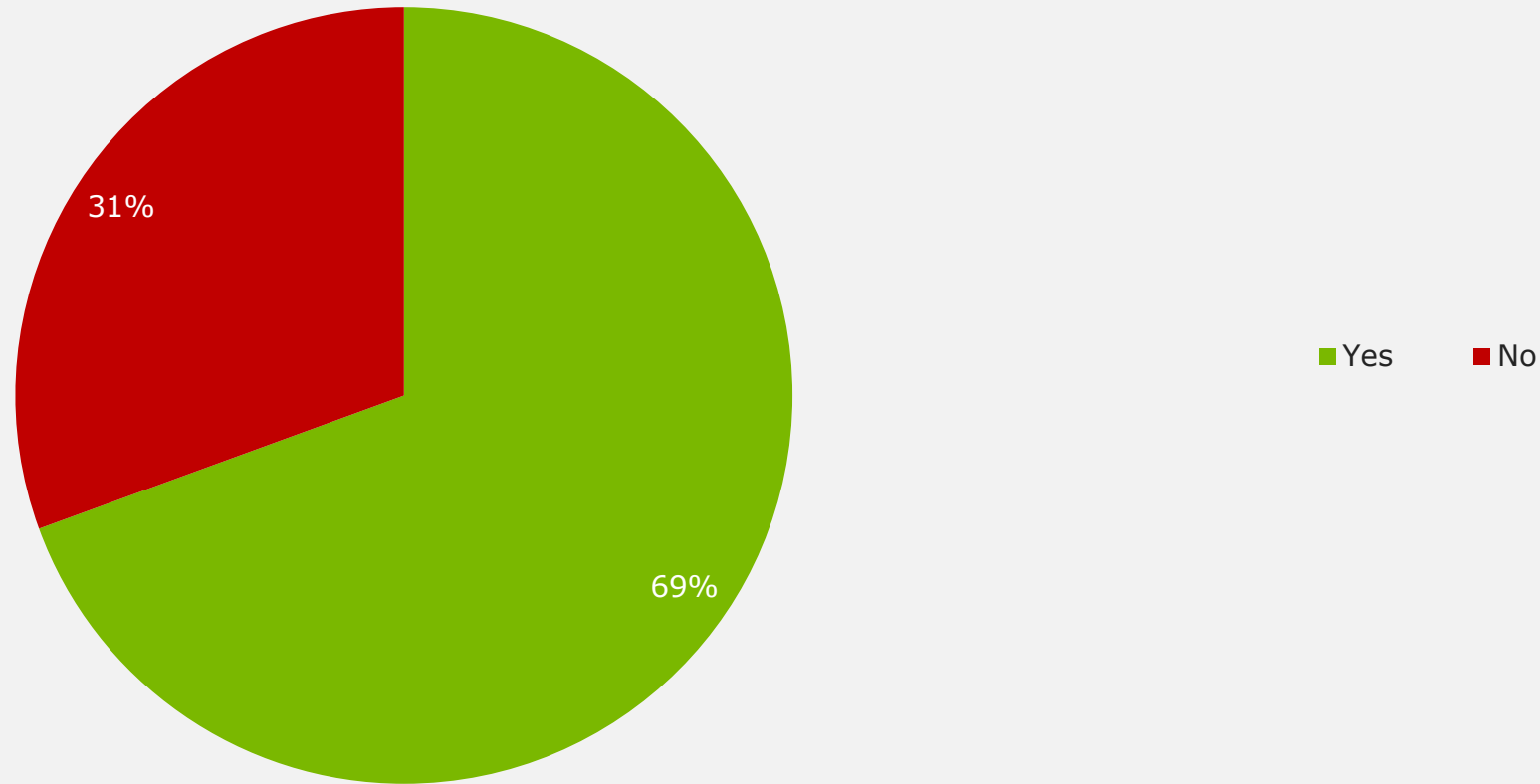
Patients with a Top 50% hearing loss tend to perceive the impact of hearing aids more positively

% of HA Owners feeling better/a lot better



69% 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?



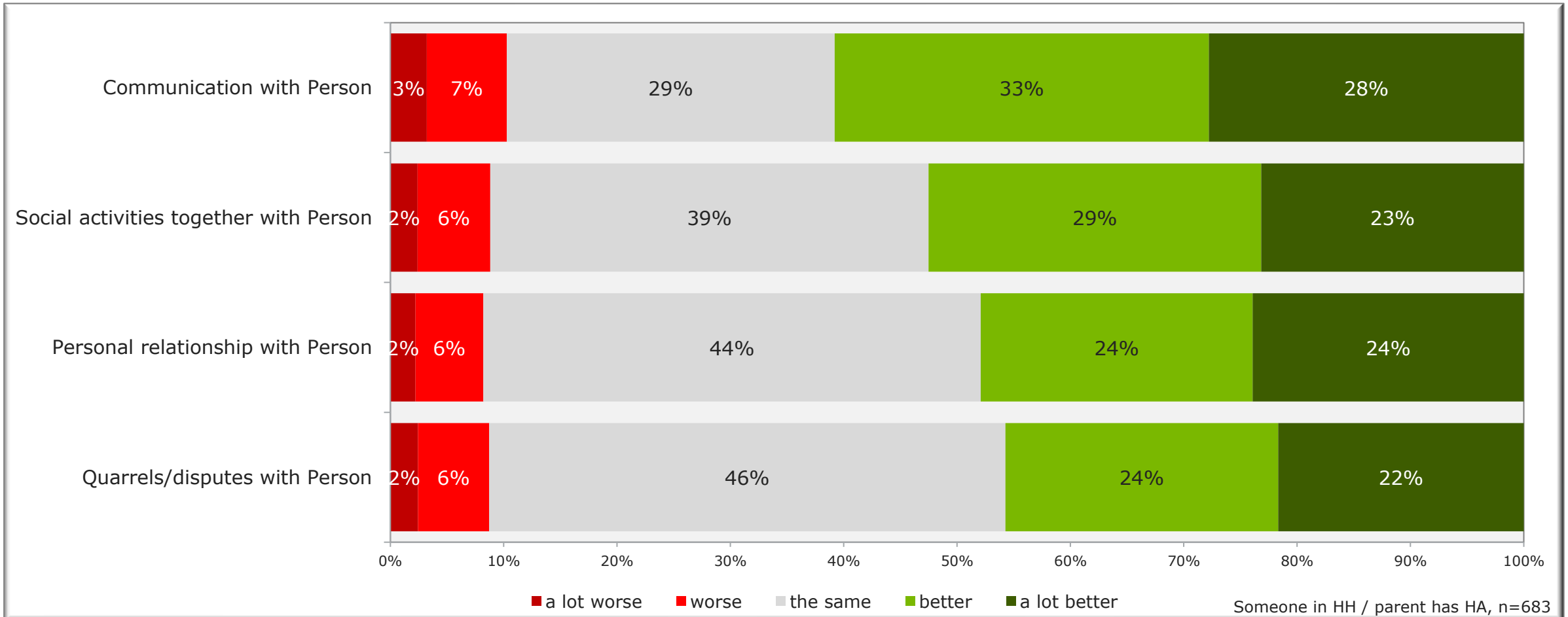
HA Owner n=599





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

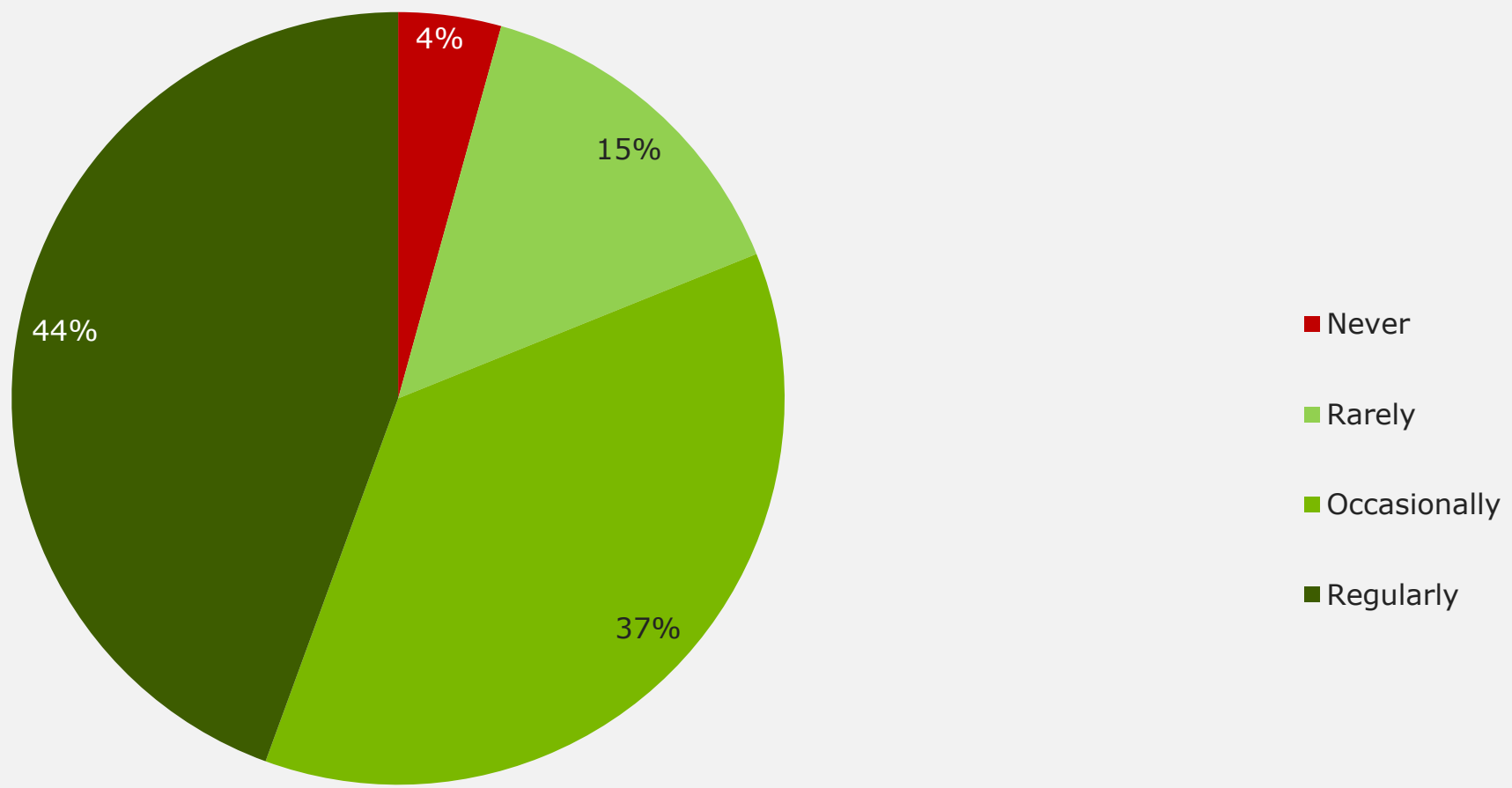
How did the following aspects change since person X is wearing hearing aids?





96% 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=599





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=599	HA Non-owner low 50% HL n=293	HA Non-owner Top 50% HL n=205
Ears impaired (stated)			
Unilateral loss	26%	42%	26%
Bilateral loss	74%	58%	74%
Perceived loss			
Mild	20%	63%	13%
Moderate	50%	35%	68%
Severe	24%	3%	18%
Profound	6%	0%	2%

← More similar hearing loss-structure →



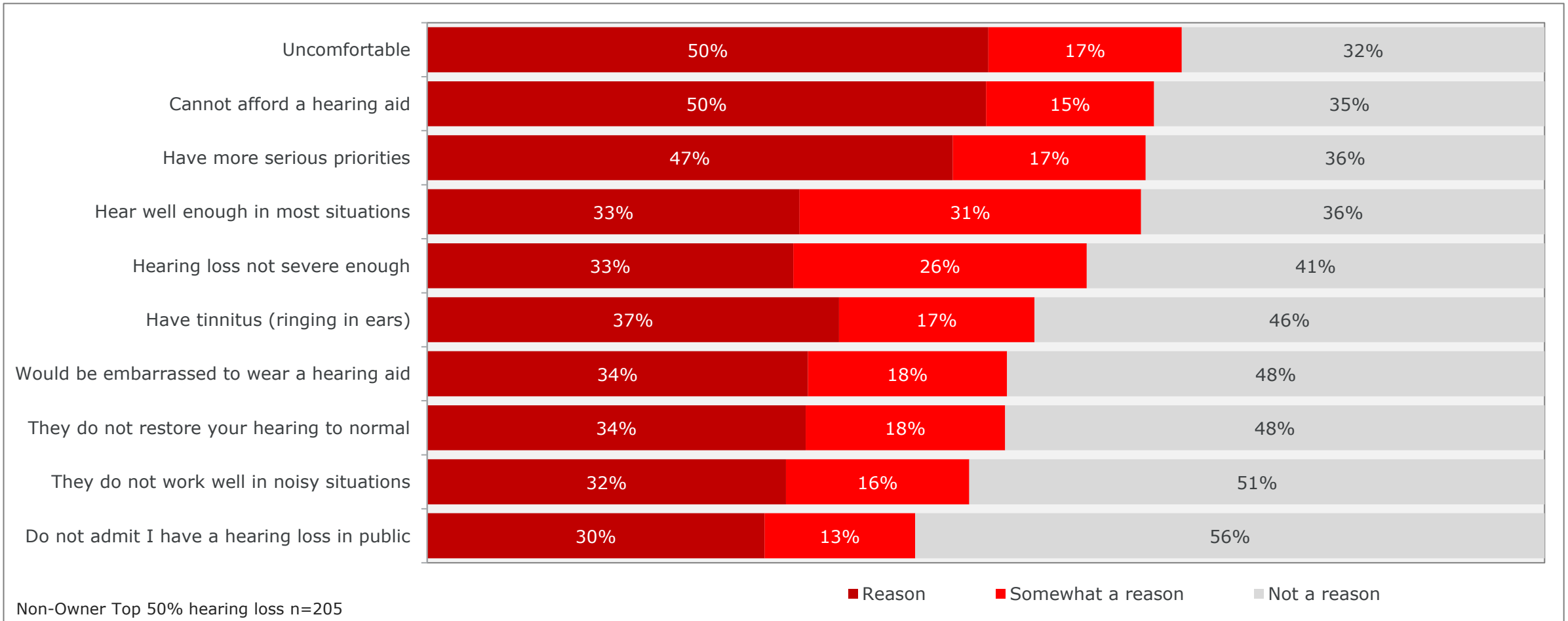


Reasons for not having hearing aids





Top 10 reasons for not having a hearing aid

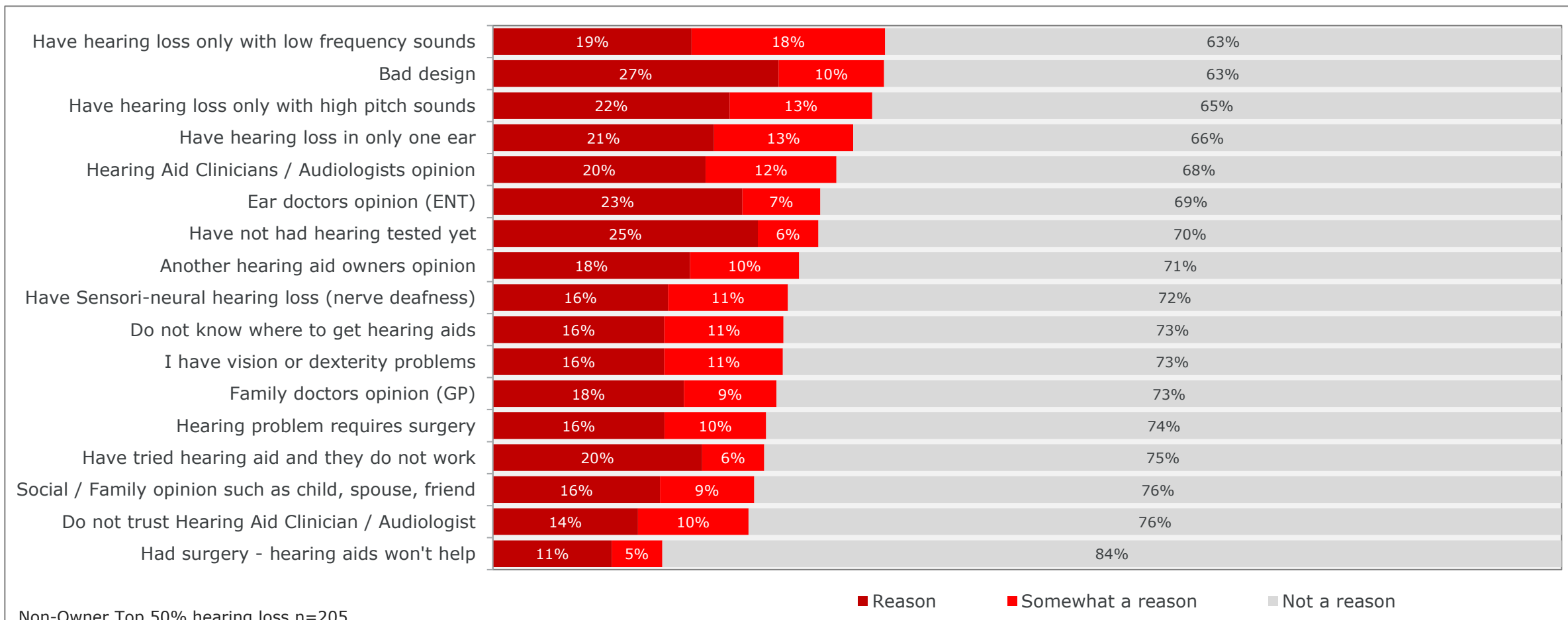


Non-Owner Top 50% hearing loss n=205





Less important reasons for not having a hearing aid

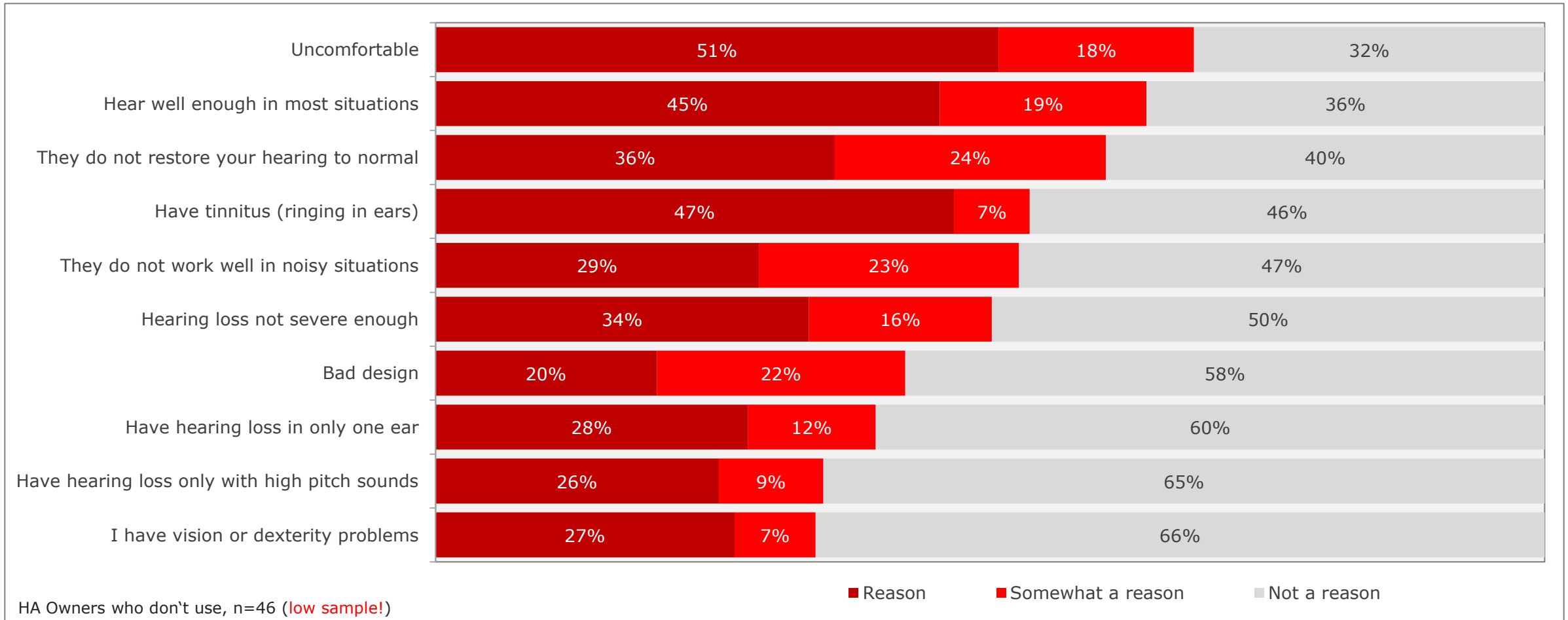


Non-Owner Top 50% hearing loss n=205





Top 10 reasons for HA owners NOT using them





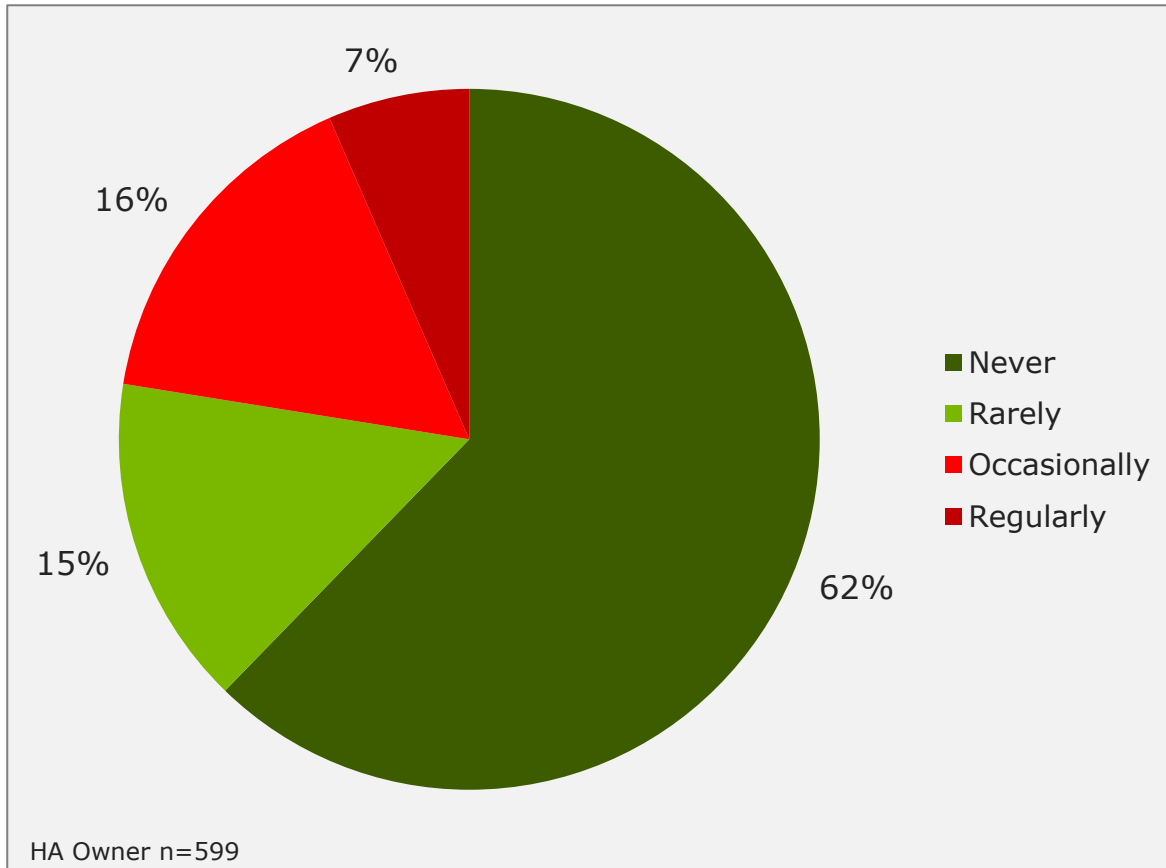
Social rejection because of hearing loss compared to the acceptance of hearing aids



62% 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

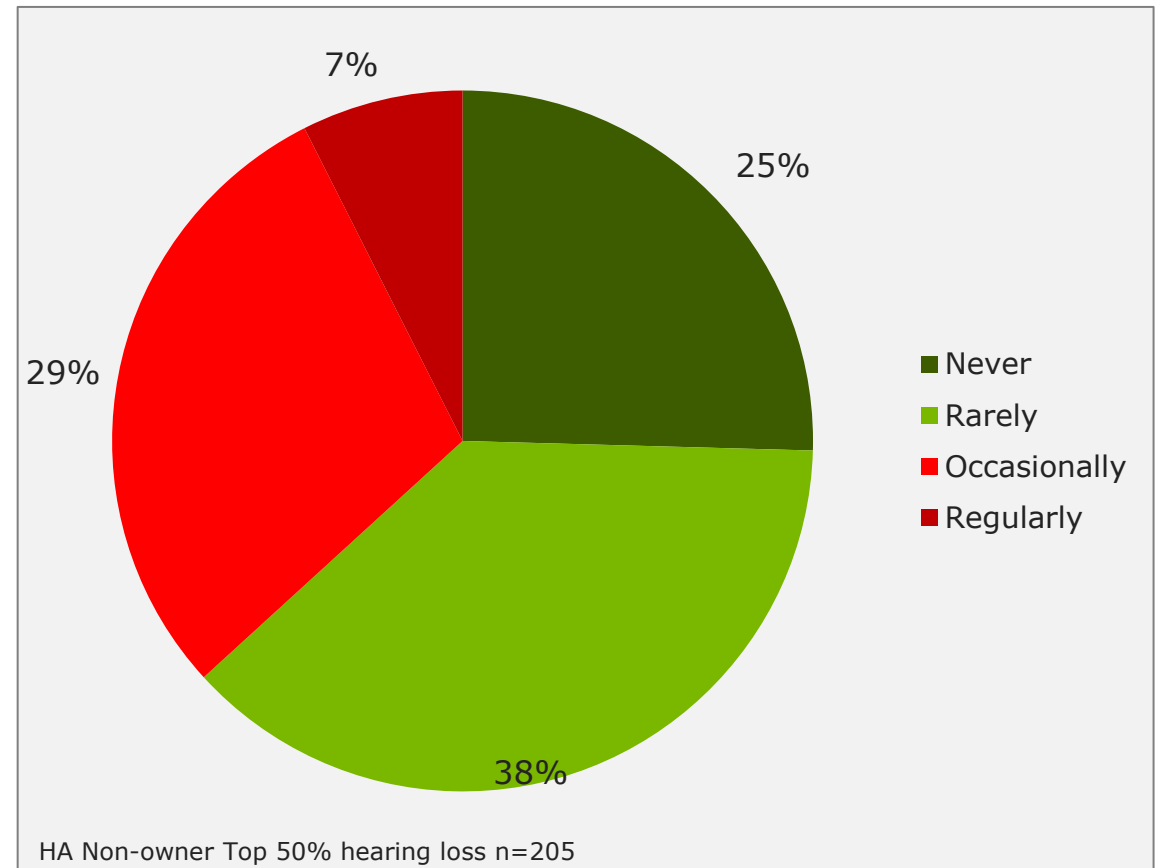
HA Owner:

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?





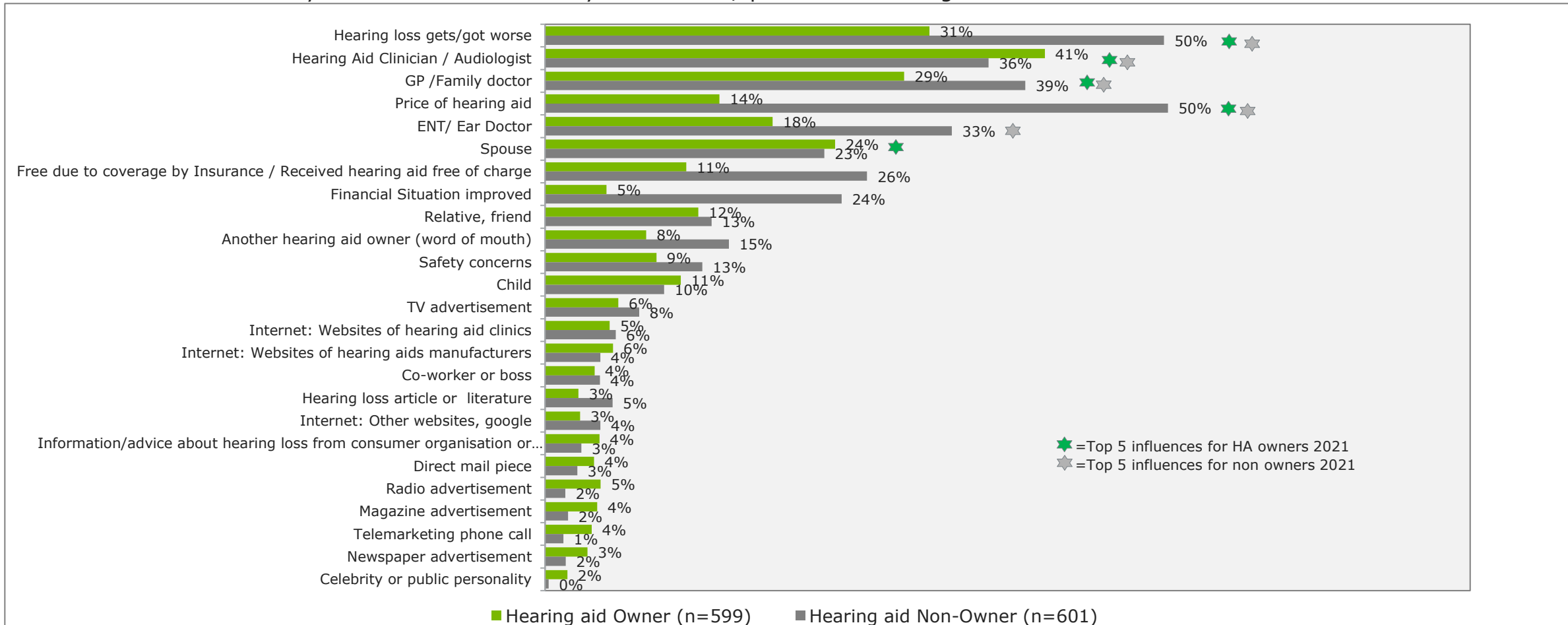
Most important triggers to buy



The key factors influencing the decision to get hearing aids are worsening hearing, advice from clinicians, GPs, ENTs, spouses, and cost (especially for non-owners)

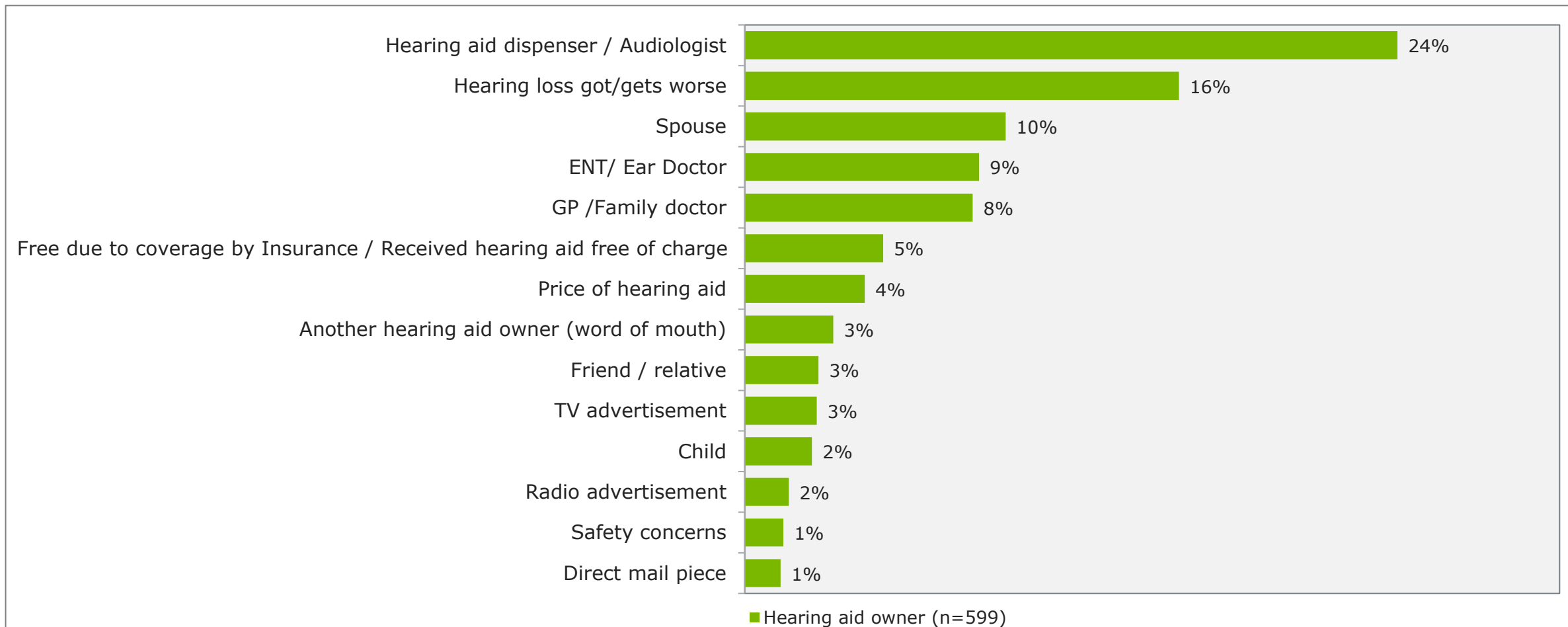
HA Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?

HA Non-owner: What do you think would influence you to obtain / purchase a hearing aid ?



The most crucial triggers for buying a hearing aid are the recommendation of a hearing aid dispenser or audiologist, and worsening hearing loss

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	7'388	11.9%	44.8%	49.1%	54.6%	54.1%
	Female	7'475	9.9%	45.3%	50.9%	45.4%	45.9%
Age recoded							
	1 - 14	2'719	3.0%	61.6%	19.9%	3.5%	6.8%
	15 - 24	1'890	4.6%	44.2%	13.6%	5.4%	5.2%
	25 - 34	2'180	5.4%	51.0%	15.6%	6.4%	8.2%
	35 - 44	2'034	6.7%	40.6%	14.3%	9.1%	7.6%
	45 - 54	1'867	11.5%	37.3%	12.5%	15.1%	10.9%
	55 - 64	1'650	16.9%	36.3%	10.4%	20.0%	13.9%
	65 - 74	1'376	23.3%	42.2%	8.0%	20.8%	18.5%
	75+	1'147	33.8%	54.5%	5.7%	19.7%	28.9%
Type of household							
	Single household	1'644	19.7%	42.7%	10.0%	20.8%	18.9%
	Couple, no kids	3'143	15.9%	49.5%	20.0%	28.3%	33.9%
	Couple with kid(s)	6'937	6.2%	45.1%	49.1%	26.6%	26.7%
	Single mom/dad with kid(s)	1'154	7.8%	40.0%	8.0%	6.1%	4.9%
	Retirement home, hospital etc.	244	35.5%	61.2%	1.2%	3.8%	7.2%
	Other	1'742	10.9%	32.1%	11.7%	14.4%	8.3%

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)	7'058	15.8%	45.1%	44.9%	68.6%	68.9%
The spouse of the head of the household	2'629	10.2%	51.3%	17.8%	14.7%	18.9%
Daughter/son of head of household	3'998	2.7%	43.8%	29.4%	6.7%	6.4%
Other person	1'178	11.1%	32.1%	7.9%	9.9%	5.7%
Employment						
Full time employed	5'262	8.6%	40.3%	46.0%	31.4%	26.7%
Part time employed	1'865	8.4%	35.4%	16.3%	11.8%	8.2%
Unemployed / not working	1'461	12.4%	29.7%	12.2%	14.8%	7.9%
Retired under a disability pension scheme (fully or partly)	578	24.4%	46.0%	4.2%	8.9%	9.5%
Early retired under an early retirement benefit scheme	307	20.7%	57.0%	2.3%	3.2%	5.3%
Retired (at the official retirement age)	1'890	28.1%	53.6%	13.0%	28.7%	41.8%
Student / pupil / in training	630	2.2%	25.9%	5.9%	1.2%	0.5%
Education						
Incomplete Secondary Education	1'499	20.3%	41.1%	11.4%	20.9%	18.4%
Secondary Education Completed	2'820	13.0%	38.2%	23.5%	26.4%	20.6%
Vocational or Professional Certification Completed	1'830	12.7%	41.1%	15.3%	16.0%	14.1%
Some University or Vocational Certification	1'239	14.0%	51.4%	10.2%	9.8%	13.1%
University Education Completed	2'843	8.9%	52.6%	24.8%	14.0%	19.7%
Postgraduate Education Completed	1'062	10.0%	57.6%	9.1%	5.2%	9.0%
Doctorate, Post-doctorate or equivalent Completed	277	11.7%	46.0%	2.3%	2.0%	2.2%
Other	424	15.8%	29.8%	3.4%	5.5%	2.9%

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	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
	Real value is within interval:	
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