



## Summary

# EuroTrak UK 2009

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

# Summary

## 1. Introduction

---

- EuroTrak UK 2009 was designed and executed by Anovum (Zürich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).
- Sample sizes UK 2009:
  - Total representative sample: n=14'980 people
  - Total hearing impaired: n=1'335 people
    - Hearing impaired non-owners: n=822 people with hearing loss (**HL**)
    - HA owners: n=513 people with hearing aid (**HA**)
- EuroTrak UK 2009 is part of the EuroTrak studies in three countries: Germany, France, United Kingdom.
- The results have been reviewed by Sergei Kochkin, Ph.D., Executive Director, Better Hearing Institute.



# Summary

## 2. Market overview

---

- Stated hearing loss prevalence
  - Age groups 18+: 11.5%.
  - Total: 9.5%.
  - Binaural hearing loss: HA owners: 54%, HA non-owners: 67%.
- Hearing aid adoption rate (HA penetration)
  - Total: 38.6%.
  - Total age group 18+: 38.5%.
  - 47% of HA owners have binaural treatment. Trend rising.
- The route to the hearing aid
  - 67 out of 100 hearing impaired discuss hearing loss with an ENT doctor or family doctor.

# Summary

## 3. Analysis of hearing aid owners

---

- Hearing aid ownership and usage
  - 74% received NHS hearing devices.
  - More than 70% of the currently owned HAs were bought in 2007 or later.
  - The average age of the currently owned HAs is 2.6 years
  - On average, HAs are worn 7.5 hours a day.
  - 77% of the currently owned HAs either had no service need or only once (57% "no" + 20% "once").
  
- Satisfaction with HAs
  - 77% of the HA owners are satisfied with their HAs (18% "somewhat satisfied" + 39% "satisfied" + 20% "very satisfied").
  - The more hours worn per day, the higher the satisfaction.
  - Satisfaction with HAs bought 2007 or after is higher than with HAs bought before.
  - Satisfaction with dispenser is generally high (79%-84%).
  - Still challenges for the future are:
    - Hearing situations: Use in noisy situations, on the telephone and conversations in large groups.
    - Product features: managing whistling/feedback/buzzing, visibility to others.
  
- Positive impact of HAs
  - Significant positive impact of HAs on different aspects – especially communication effectiveness and relationships at home.



# Summary

## 4. Analysis of hearing impaired non-owners

---

- Reasons not to own/use HAs
  - Information deficit non-owners: 47% don't know whether insurance would pay, 22% assume they don't pay.
  - The main reasons for not using hearing aids are that people say they hear enough and that they argue hearing aids are uncomfortable.
  - 7% who own HAs don't use them. Main reasons for this are: "HAs do not restore hearing to normal", "not good in noisy situations" and "uncomfortable".
- "Negative non-owners" vs. "positive non-owners" opinion
  - Beliefs of "negative non-owners"
    - These people believe they hear enough without hearing aids and hearing aids are not cheap.
    - They think that HAs are not adequate for everyday life.
    - These rational reasons are more dominant than emotional ones ("Stigma").
  - Beliefs of "positive non-owners"
    - They tend to not fear stigma and agree about the advantages of hearing aids.
    - Barriers to buy are: Costs/costs-performance, they believe that without HAs they only hear what they want to hear / hear enough.
    - Positive non-owners clearly prefer ITEs compared to BTEs as they believe only these devices are invisible.
- Negative impact of hearing loss and acquiring intentions
  - Hearing impaired non-owners tend to feel less sound and safe and participate less in social activity compared to satisfied hearing aid-owners.
  - 9% of non-owners intend to acquire a hearing aid within the next year.
  - What non-owners say would influence them to acquire is not necessarily what owners say influenced them to acquire. The most important influencing factors for owners were a worse hearing loss, the audiologist as well as spouse/relatives/child/friend.





Results

# EuroTrak UK 2009

# Detailed Results: Roadmap

---

## 1. Introduction

- Objectives and organisation
- Field research specification
  - Outline of the questionnaire
  - Recruitment process
  - Representativeness

## 2. Market overview

- Prevalence of hearing loss and hearing aid adoption rate
- Demographics of hearing aid owners and non-owners

## 3. Analysis of hearing aid owners

- Owners: Degree of hearing loss
- Owners: Drivers of commitment
- Hearing aid ownership and usage
- Satisfaction with HA and drivers
- Positive impact of hearing aids

## 4. Analysis of hearing impaired non-owners

- Non owners: Degree of hearing loss
- Non owners: Drivers of openness
- Reasons not to own hearing aids
- Negative impact of hearing loss
- Acquiring intentions



---

# 1. Introduction



# Organisation of EuroTrak 2009

---

## Organisation

- Principal of the project EuroTrak is the European Hearing Instrument Manufacturers Association [EHIMA]. Members of EHIMA are: GN Resound, Oticon, Phonak, Siemens, Starkey and Widex [EHIMA Companies].
- Anovum Zürich developed the concept of EuroTrak, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore Anovum analysed the data and prepared the presentation.
- EHIMA approved the questionnaire in cooperation with Sergei Kochkin, Ph.D., Executive Director, Better Hearing Institute.
- For some analysis Anovum applied a specific technique to analyse the data that initially was developed for Brand Equity research ("Anovum Commitment Model / Share of Wallet Predictor")

## Use of the data

- The principal as well as the EHIMA companies may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.
- The raw dataset remains at Anovum. If the principal or the EHIMA companies use the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:  
**"Source: Anovum – EuroTrak – UK/2009/n=[relevant sample size]"**
- The principal and EHIMA companies can ask Anovum to further analyse the raw data in specific ways at their own expense.



# Field research specification

---



# Outline of the questionnaire

|   | HA owners | HA non-owners |
|---|-----------|---------------|
| INTERVIEW INTRODUCTION  | X         | X             |
| SCREENER QUOTA DEMOGRAPHICS   | X         | X             |
| SCREENER HEARING LOSS -> SELECTION INTERVIEWEE  | X         | X             |
| DEGREE OF HL AND BINAURAL TREATMENT/ DETAILED HEARING LOSS                                  | X         | X             |
| GENERAL ATTITUDES   | X         | X             |
| FACTORS DRIVING AND UNDERMINING COMMITMENT TOWARD THE OPTIONS HOW TO LIVE WITH HEARING LOSS | X         | X             |
| HEARING AID OWNED AND USED  | X         |               |
| SATISFACTION CURRENT HEARING AID  | X         |               |
| POSITIVE IMPACTS OF HEARING AIDS  | X         |               |
| REASONS NOT TO USE HA   |           | X             |
| NEGATIVE IMPACTS OF HL  | X         | X             |
| TRIAL AND BUYING INTENTIONS   | X         | X             |
| SOCIODEMOGRAPHICS   | X         | X             |



# Recruitment process: In search of hearing impaired people

## Step 1: Screening interviews

Objective: Prevalence of hearing loss and hearing aid ownership

Process:

1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)
2. Contacts from a panellist pool of more than 100'000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=14'980** 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=513** hearing aid owners and **n=822** hearing impaired non-owners



# In search of hearing impaired people

- **Step 1:** Structure of total representative screening interviews sample (weighted) : n=14980 people

|                 |         | Sex   |                  |        |                  |       |                  |
|-----------------|---------|-------|------------------|--------|------------------|-------|------------------|
|                 |         | Male  |                  | Female |                  | Total |                  |
|                 |         | Count | Column Valid N % | Count  | Column Valid N % | Count | Column Valid N % |
| Alter recodiert | bis 14  | 1344  | 18.3%            | 1281   | 16.8%            | 2624  | 17.5%            |
|                 | 15 - 24 | 1029  | 14.0%            | 976    | 12.8%            | 2005  | 13.4%            |
|                 | 25 - 34 | 972   | 13.2%            | 956    | 12.5%            | 1928  | 12.9%            |
|                 | 35 - 44 | 1106  | 15.0%            | 1127   | 14.8%            | 2233  | 14.9%            |
|                 | 45 - 54 | 983   | 13.4%            | 1009   | 13.2%            | 1991  | 13.3%            |
|                 | 55 - 64 | 870   | 11.8%            | 904    | 11.9%            | 1775  | 11.8%            |
|                 | 65 - 74 | 597   | 8.1%             | 661    | 8.7%             | 1258  | 8.4%             |
|                 | 74+     | 457   | 6.2%             | 708    | 9.3%             | 1165  | 7.8%             |
|                 | Total   | 7358  | 100.0%           | 7622   | 100.0%           | 14980 | 100.0%           |

Establish prevalence of hearing loss and hearing aid ownership

- **Step2:** Structure of hearing impaired sample (weighted\*): n=1335 people

|                 |         | Gender |                  |        |                  |       |                  |
|-----------------|---------|--------|------------------|--------|------------------|-------|------------------|
|                 |         | Male   |                  | Female |                  | Total |                  |
|                 |         | Count  | Column Valid N % | Count  | Column Valid N % | Count | Column Valid N % |
| Alter recodiert | bis 14  | 21     | 3.0%             | 20     | 3.2%             | 42    | 3.1%             |
|                 | 15 - 24 | 33     | 4.7%             | 28     | 4.5%             | 61    | 4.6%             |
|                 | 25 - 34 | 41     | 5.8%             | 35     | 5.6%             | 76    | 5.7%             |
|                 | 35 - 44 | 86     | 12.0%            | 37     | 5.9%             | 122   | 9.2%             |
|                 | 45 - 54 | 96     | 13.4%            | 71     | 11.4%            | 167   | 12.5%            |
|                 | 55 - 64 | 132    | 18.6%            | 84     | 13.5%            | 217   | 16.2%            |
|                 | 65 - 74 | 132    | 18.5%            | 102    | 16.4%            | 234   | 17.5%            |
|                 | 74+     | 171    | 24.0%            | 246    | 39.5%            | 417   | 31.2%            |
|                 | Total   | 712    | 100.0%           | 623    | 100.0%           | 1335  | 100.0%           |

Details about satisfaction with hearing aids (n=513 owner) and reasons for non-adoption (n=822 impaired non-owner)



---

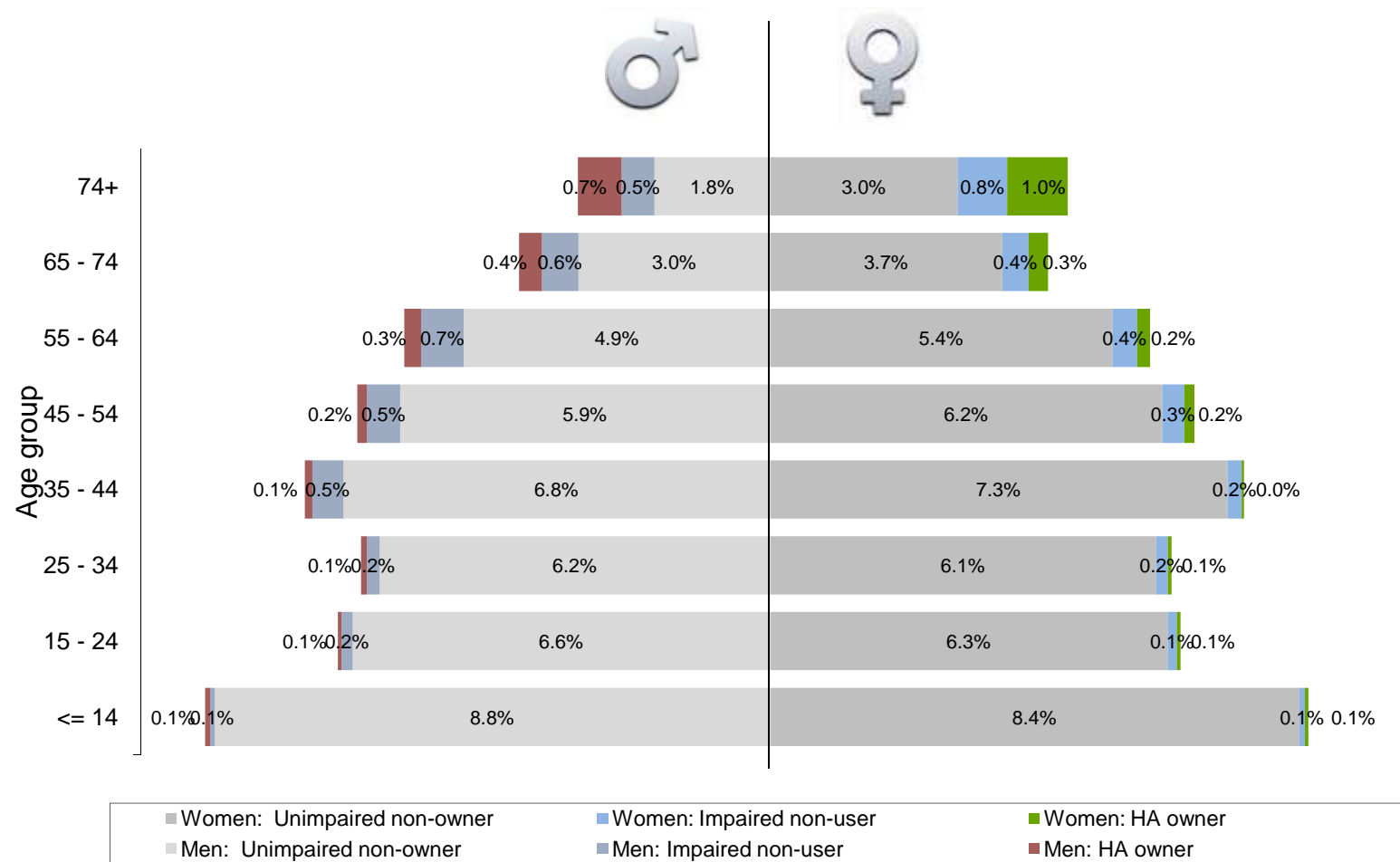
## 2. Market overview

# Prevalence of hearing loss and adoption rate

---



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



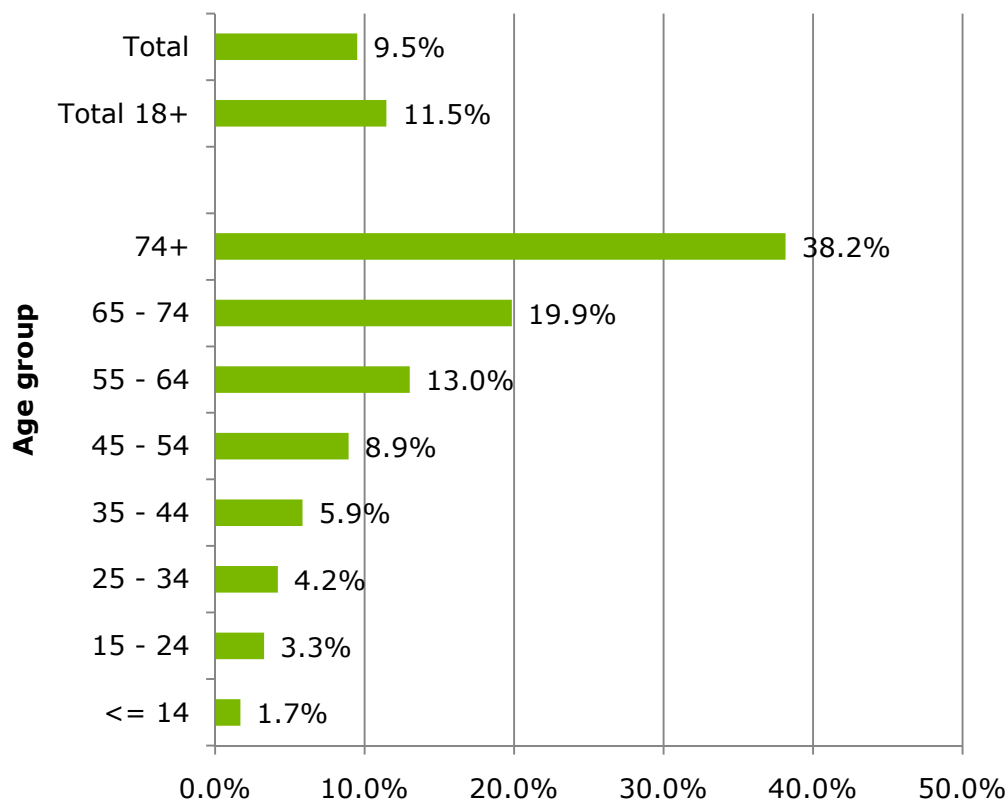
Base: n= 14'980



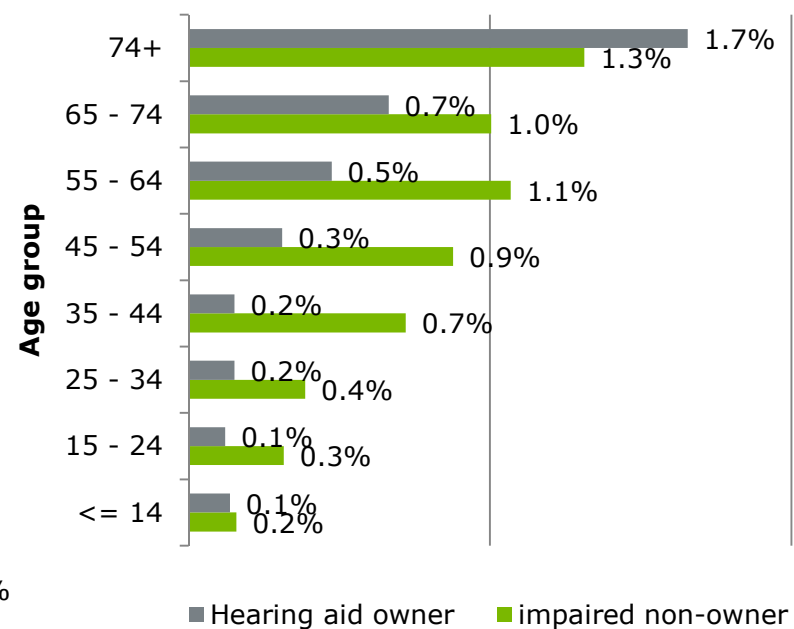


# Hearing loss prevalence UK 2009 (self-reported)

**% Hearing loss prevalence** (Base=population / n=14980)

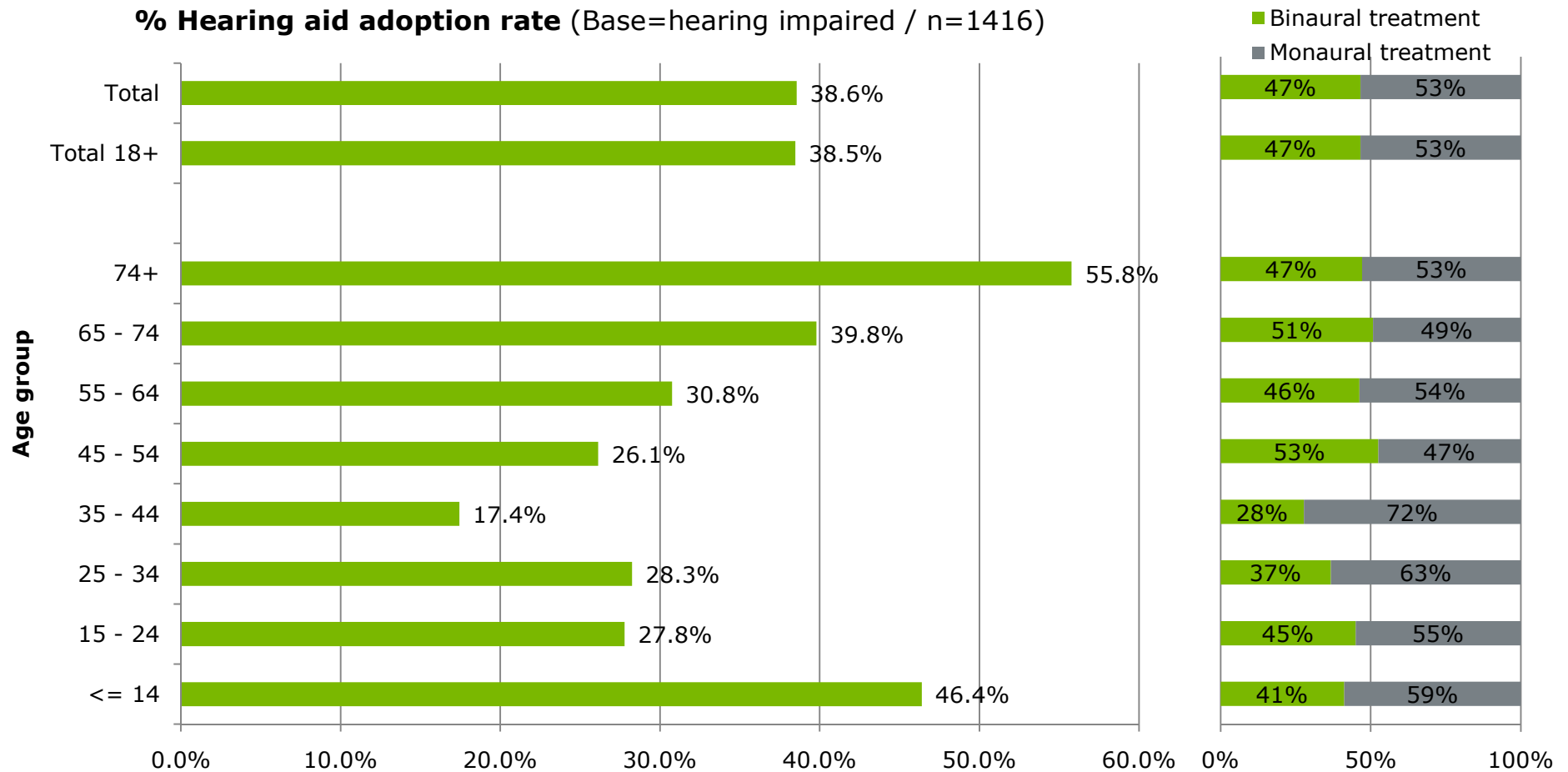


**Hearing loss population: Owner/non-owner** (Base=hearing impaired / all figures sum up to 9.5% / n=1416)



# Hearing aid adoption rate UK 2009

## Total adoption rate is 38.6%



Base: n= 550 (HA owners)



# Demographics of hearing aid owners and non-owners

---



# Hearing loss

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

|                               | %HA-Non-owner (n=822) | % HA Owner (n=513) | Hearing Aid Adoption (%) | People with stated HL without HA* |
|-------------------------------|-----------------------|--------------------|--------------------------|-----------------------------------|
| <b>Ears impaired (stated)</b> |                       |                    |                          |                                   |
| Unilateral loss               | 46%                   | 33%                | 32%                      | 1'640'000                         |
| Bilateral loss                | 54%                   | 67%                | 45%                      | 1'920'000                         |
|                               |                       |                    |                          |                                   |
| <b>Perceived loss</b>         |                       |                    |                          |                                   |
| Mild                          | 42%                   | 11%                | 14%                      | 1'490'000                         |
| Moderate                      | 50%                   | 57%                | 42%                      | 1'780'000                         |
| Severe                        | 5%                    | 29%                | 73%**                    | 180'000                           |
| Profound                      | 2%                    | 3%                 |                          | 70'000                            |

n's are unweighted whereas the shown results are weighted

\* projection

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

(c) Anovum 2009 - EuroTrak UK 2009



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

Hearing impaired population n=1426

| Category | Demographics                   | Total sample unweighted n | Hearing loss % | Hearing aid adoption rate % (Base=hearing impaired) | Hearing aid non owner (Categories add to 100%) | Hearing aid owner (Categories add to 100%) |
|----------|--------------------------------|---------------------------|----------------|---|--|--|
| Gender   | Male                           | 7425                      | 10%            | 36%   | 55.5%  | 49.9%                                      |
|          | Female                         | 7555                      | 9%             | 41%   | 44.5%  | 50.1%                                      |
| Age      | <= 14                          | 1539                      | 2%             | 46%   | 2.7%   | 3.7%                                       |
|          | 15 - 24                        | 2200                      | 3%             | 28%   | 5.4%   | 3.3%                                       |
|          | 25 - 34                        | 1594                      | 4%             | 28%   | 6.6%   | 4.2%                                       |
|          | 35 - 44                        | 1747                      | 6%             | 17%   | 12.3%  | 4.1%                                       |
|          | 45 - 54                        | 2611                      | 9%             | 26%   | 15.0%  | 8.5%                                       |
|          | 55 - 64                        | 2639                      | 13%            | 31%   | 18.3%  | 12.9%                                      |
|          | 65 - 74                        | 1544                      | 20%            | 40%   | 17.2%  | 18.1%                                      |
|          | 74+                            | 1106                      | 38%            | 56%   | 22.5%  | 45.1%                                      |
| Inhabit  | <= 10'000                      | 2173                      | 11%            | 44%   | 18.5%  | 22.4%                                      |
|          | > 10'000, <= 50'000            | 3071                      | 9%             | 36%   | 26.3%  | 22.2%                                      |
|          | > 50'000, <= 500'000           | 3717                      | 9%             | 39%   | 29.4%  | 28.6%                                      |
|          | > 500'000, <= 1 Mio.           | 1150                      | 11%            | 42%   | 10.8%  | 12.1%                                      |
|          | > 1 Mio.                       | 1733                      | 10%            | 39%   | 14.9%  | 14.8%                                      |
| HHsize   | 1 Person                       | 1314                      | 14%            | 39%   | 11.7%  | 12.1%                                      |
|          | 2 Persons                      | 4398                      | 13%            | 43%   | 34.0%  | 40.1%                                      |
|          | 3 Persons                      | 3227                      | 9%             | 38%   | 21.3%  | 20.9%                                      |
|          | 4 Persons                      | 3713                      | 7%             | 38%   | 19.7%  | 19.4%                                      |
|          | 5+ Persons                     | 2328                      | 6%             | 26%   | 13.4%  | 7.5%                                       |
| Type     | Single HH                      | 1589                      | 19%            | 45%   | 17.3%  | 22.3%                                      |
|          | Couple without kid(s)          | 4393                      | 14%            | 45%   | 32.8%  | 42.1%                                      |
|          | Couple with kid(s)             | 6102                      | 6%             | 30%   | 30.7%  | 21.3%                                      |
|          | Single mom/dad with kid(s)     | 863                       | 5%             | 20%   | 4.1%   | 1.7%                                       |
|          | Retirement home, hospital etc. | 115                       | 36%            | 62%   | 1.8%   | 4.8%                                       |
|          | Other                          | 1918                      | 9%             | 27%   | 13.2%  | 7.9%                                       |



Owner: n=550  
 Non-owner: n=876



# Demographics (2) Hearing instrument adoption rates and populations

Hearing impaired population n=1426

| Category   | Demographics                                   | Total sample unweighted n | Hearing loss % | Hearing aid adoption rate % (Base=hearing impaired) | Hearing aid non owner (Categories add to 100%) | Hearing aid owner (Categories add to 100%) |
|------------|--|---------------------------|----------------|---|--|--|
| Status     | The head of the household (alone or together ) | 7822                      | 14%            | 39%   | 67.2%  | 68.2%                                      |
|            | The spouse of the head of the household        | 2928                      | 9%             | 40%   | 17.2%  | 18.5%                                      |
|            | Daughter/son of head of household              | 3102                      | 2%             | 28%   | 8.3%   | 5.1%                                       |
|            | Other Person                                   | 1127                      | 10%            | 41%   | 7.3%   | 8.2%                                       |
| Employment | Full time                                      | 8129                      | 6%             | 25%   | 42.9%  | 23.5%                                      |
|            | Part time                                      | 1382                      | 6%             | 26%   | 7.3%   | 4.3%                                       |
|            | No job   | 1192                      | 7%             | 29%   | 7.3%   | 4.9%                                       |
|            | Retired  | 3390                      | 23%            | 50%   | 39.2%  | 65.1%                                      |
|            | Student  | 772                       | 5%             | 28%   | 3.3%   | 2.1%                                       |
| Education  | Secondary/Grammar School                       | 2660                      | 15%            | 43%   | 24.9%  | 30.3%                                      |
|            | O Levels                                       | 2345                      | 9%             | 32%   | 15.7%  | 12.2%                                      |
|            | A Levels                                       | 1954                      | 7%             | 33%   | 10.5%  | 8.5%                                       |
|            | Ordinary National Certificate                  | 620                       | 9%             | 41%   | 3.9%   | 4.5%                                       |
|            | Higher National Certificate                    | 999                       | 7%             | 41%   | 5.2%   | 6.0%                                       |
|            | Technical High School                          | 760                       | 12%            | 37%   | 6.2%   | 5.9%                                       |
|            | University                                     | 4366                      | 7%             | 35%   | 23.7%  | 20.6%                                      |
|            | Other  | 1154                      | 13%            | 42%   | 9.9%   | 12.0%                                      |
| HH Income  | Under £ 10'000                                 | 1066                      | 9%             | 24%   | 9.1%   | 4.7%                                       |
|            | £ 10,000 - 19,999                              | 2181                      | 11%            | 41%   | 18.4%  | 20.3%                                      |
|            | £ 20,000 - 29,999                              | 2547                      | 10%            | 34%   | 21.3%  | 17.5%                                      |
|            | £ 30,000 - 39,999                              | 2377                      | 9%             | 45%   | 15.6%  | 20.3%                                      |
|            | £ 40,000 - 49,999                              | 1902                      | 9%             | 36%   | 14.1%  | 12.6%                                      |
|            | £ 50,000 - 59,999                              | 1011                      | 10%            | 50%   | 6.5%   | 10.6%                                      |
|            | £ 60,000 - 79,999                              | 1296                      | 10%            | 36%   | 10.5%  | 9.6%                                       |
| > £ 80,000 | 820  | 7%                        | 37%            | 4.5%  | 4.3%   |  |



Owner: n=550  
 Non-owner: n=876



---

## 3. Analysis of hearing aid owners

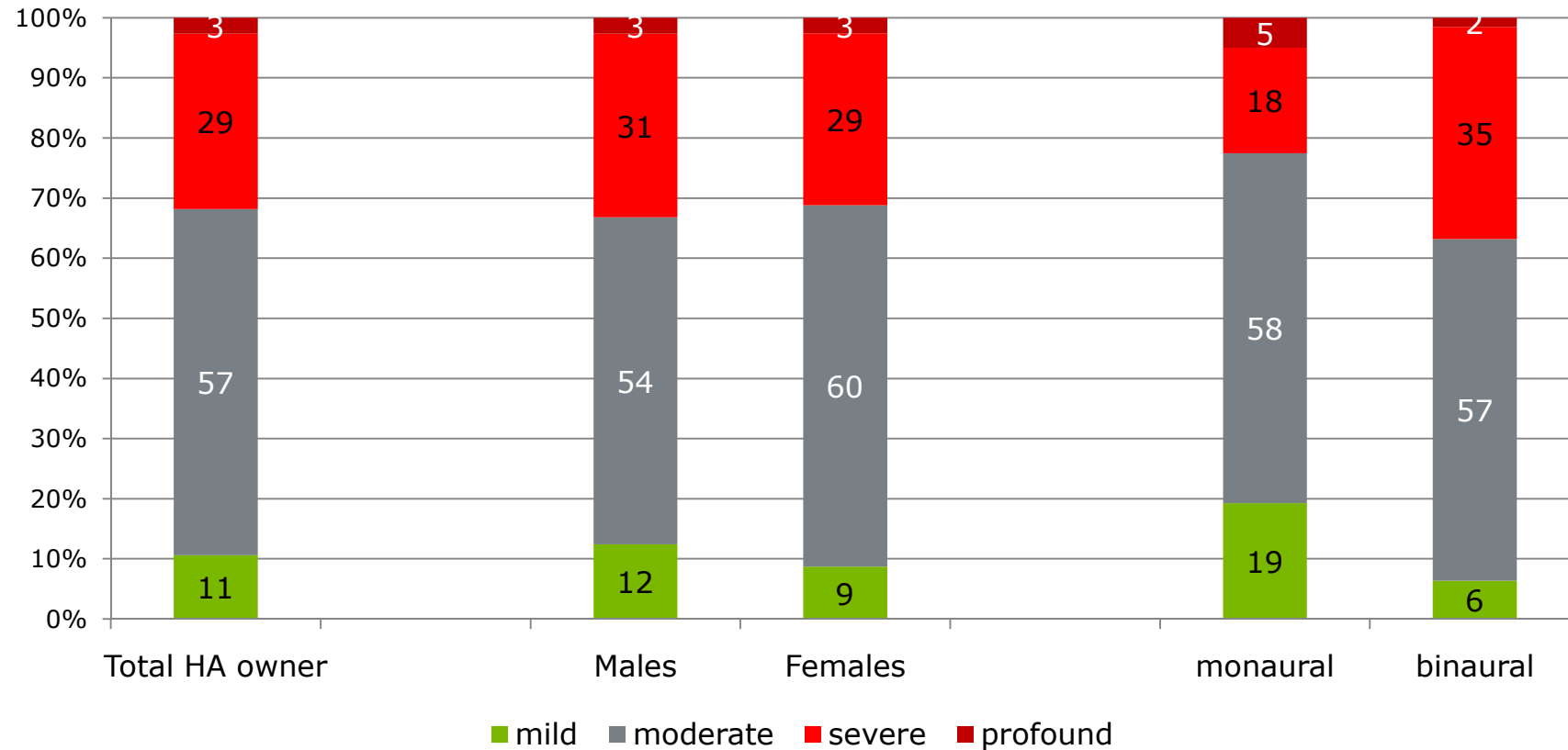
# Owners: Degree of hearing loss

---





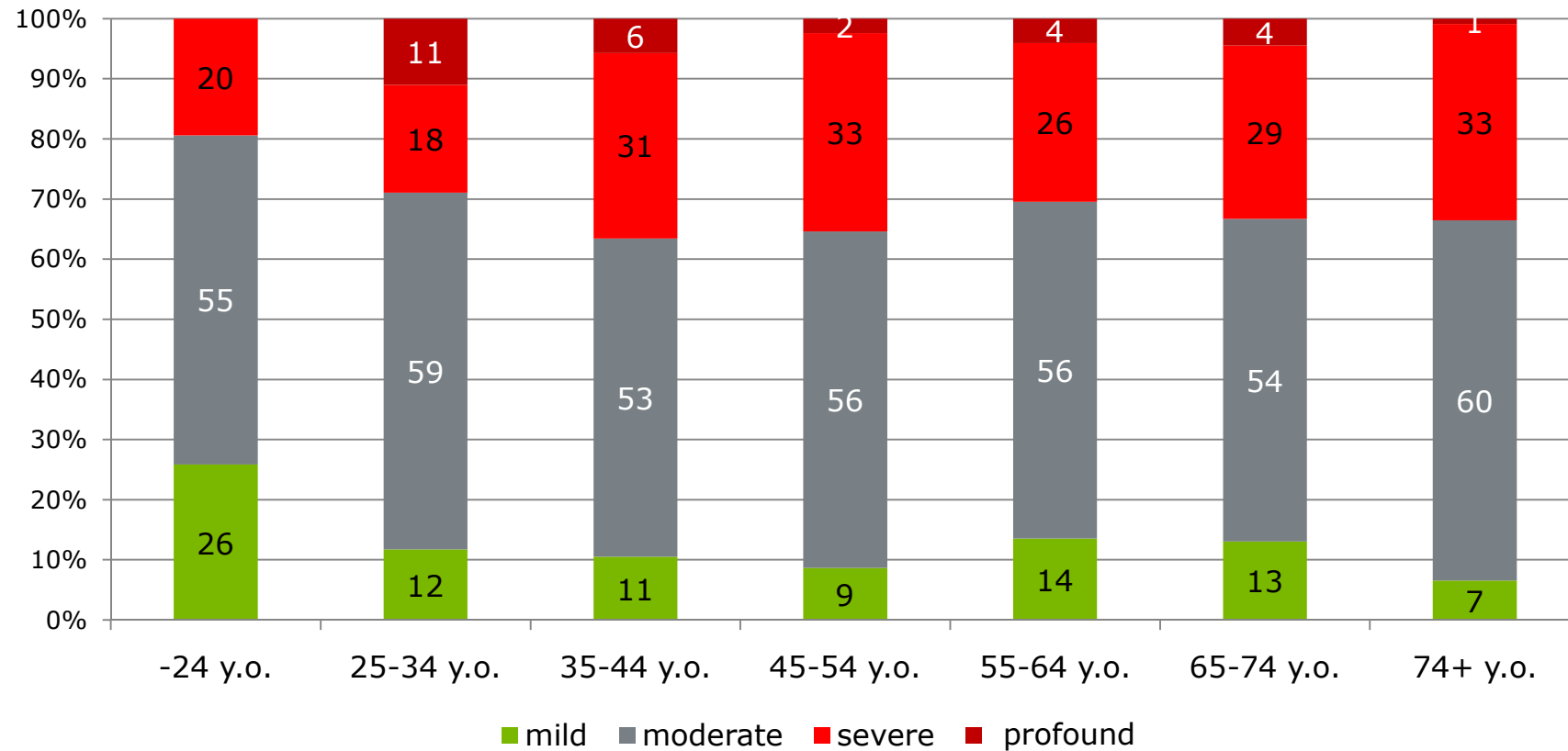
# Subjective hearing loss of HA-owners: 33% of all HA-owners have a severe or profound hearing loss



HA-owner, n=513



# Subjective hearing loss of HA-owners by age



HA-owner, n=513

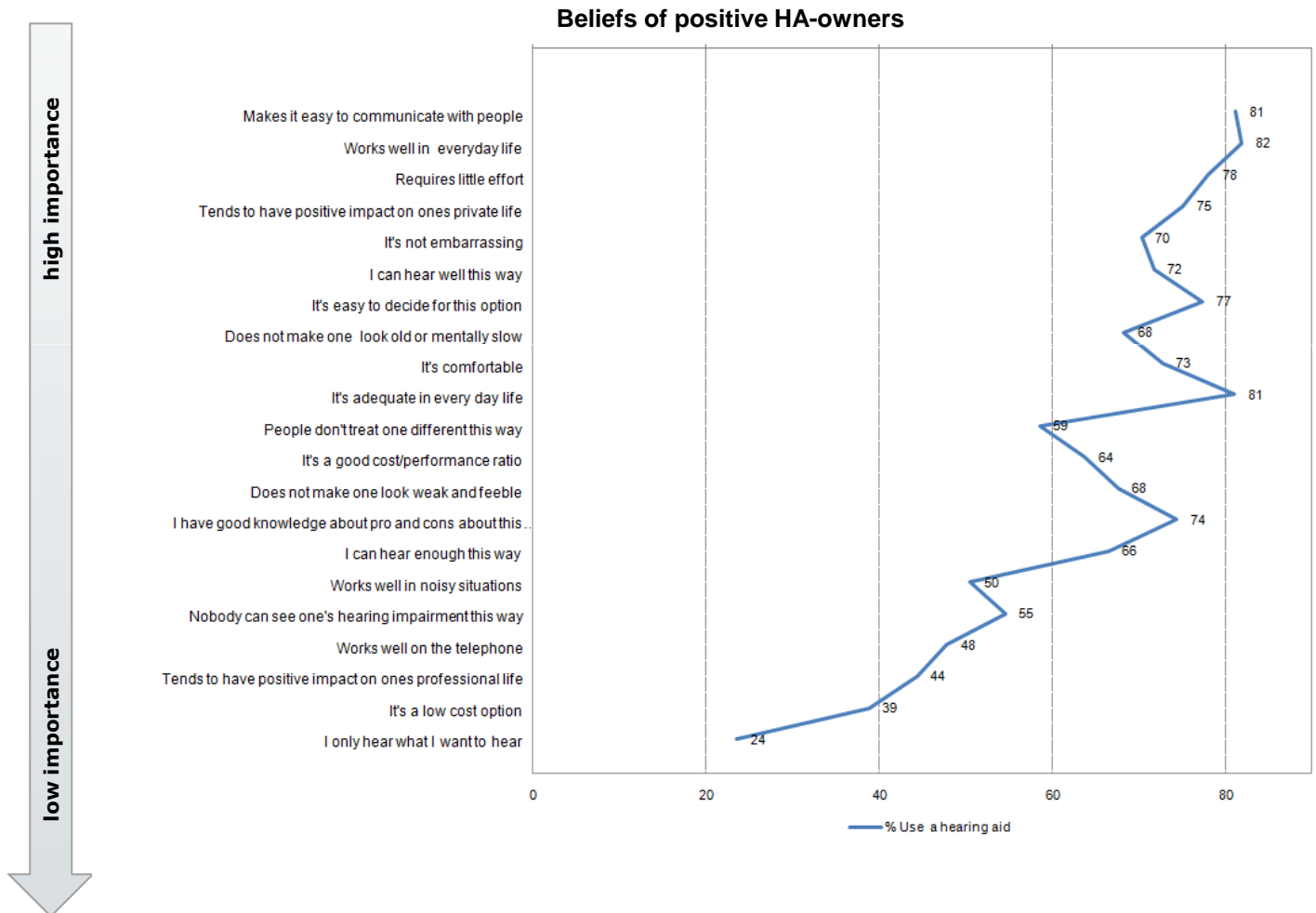


# Owners: Drivers of preference

---



# Beliefs of positive HA-owners: HA is the best solution to live with hearing loss. Price/costs of this option is less important to them.



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

**Read:** In this group, "Makes it easy to communicate with people" is the most important criterion. 81% say that "use a hearing aid" makes it easy to communicate with people.

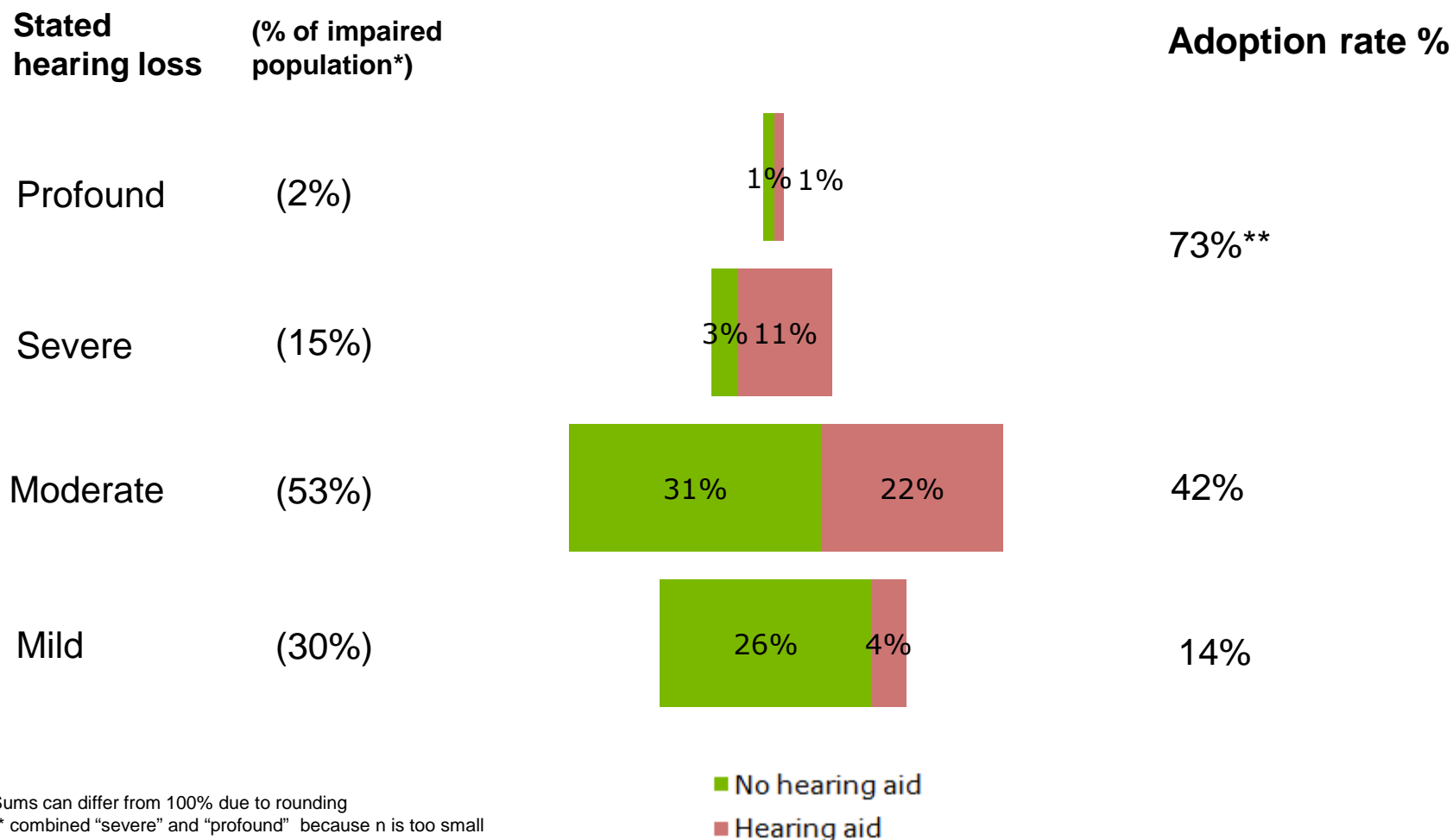


# Hearing aid ownership and usage

---



# Low adoption rates within mild and moderate hearing loss

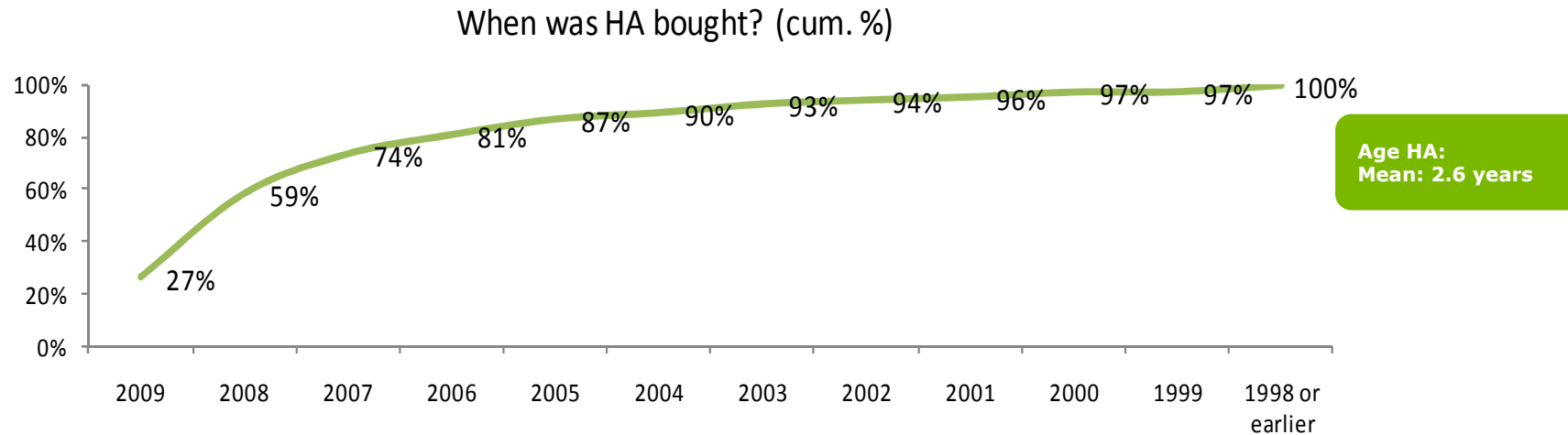


Sums can differ from 100% due to rounding

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



74% of the currently owned HAs were bought in 2007 or later.



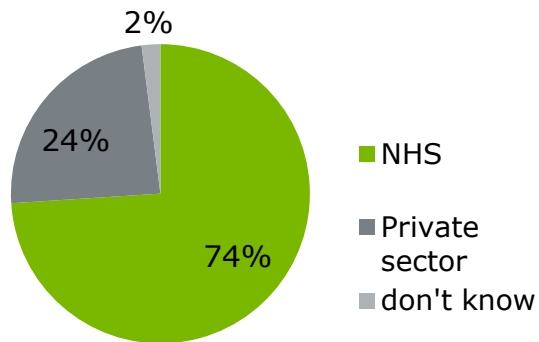
HA-owner, n=513



# 74% received a free-of-charge NHS instrument

---

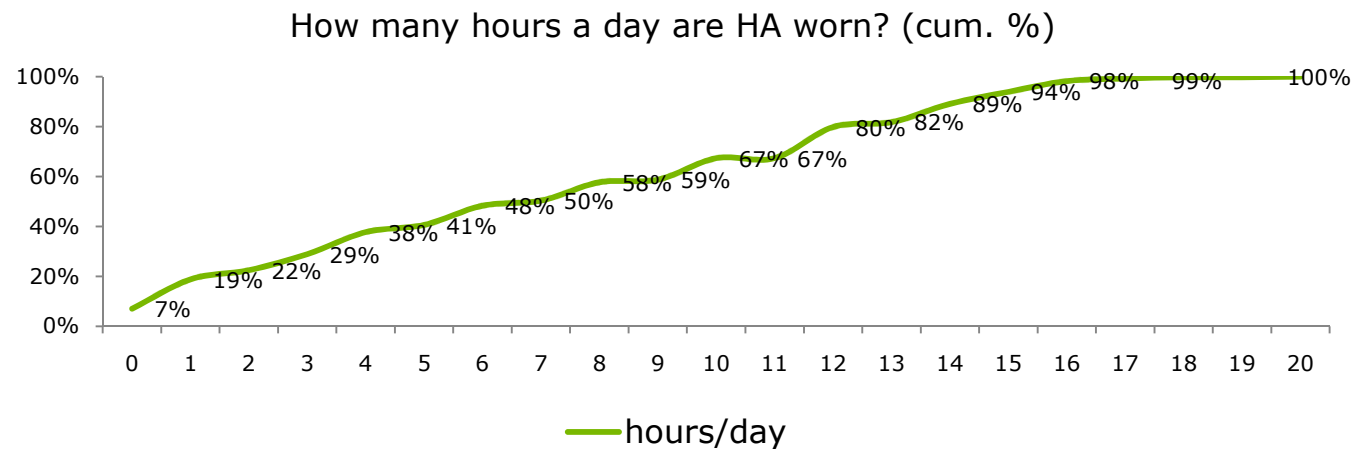
**Owners:** : Did you purchase your most current hearing aid in the private sector or did you receive a free-of-charge NHS instrument?



HA-owner, n=513

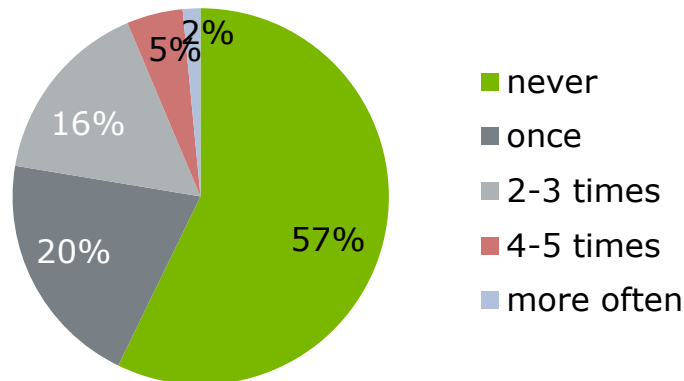


On average, HAs are worn 7.5 hours a day. 77% of the currently owned HAs either had no repair need or only once.



**HA worn:  
Mean: 7.5 hours/day**

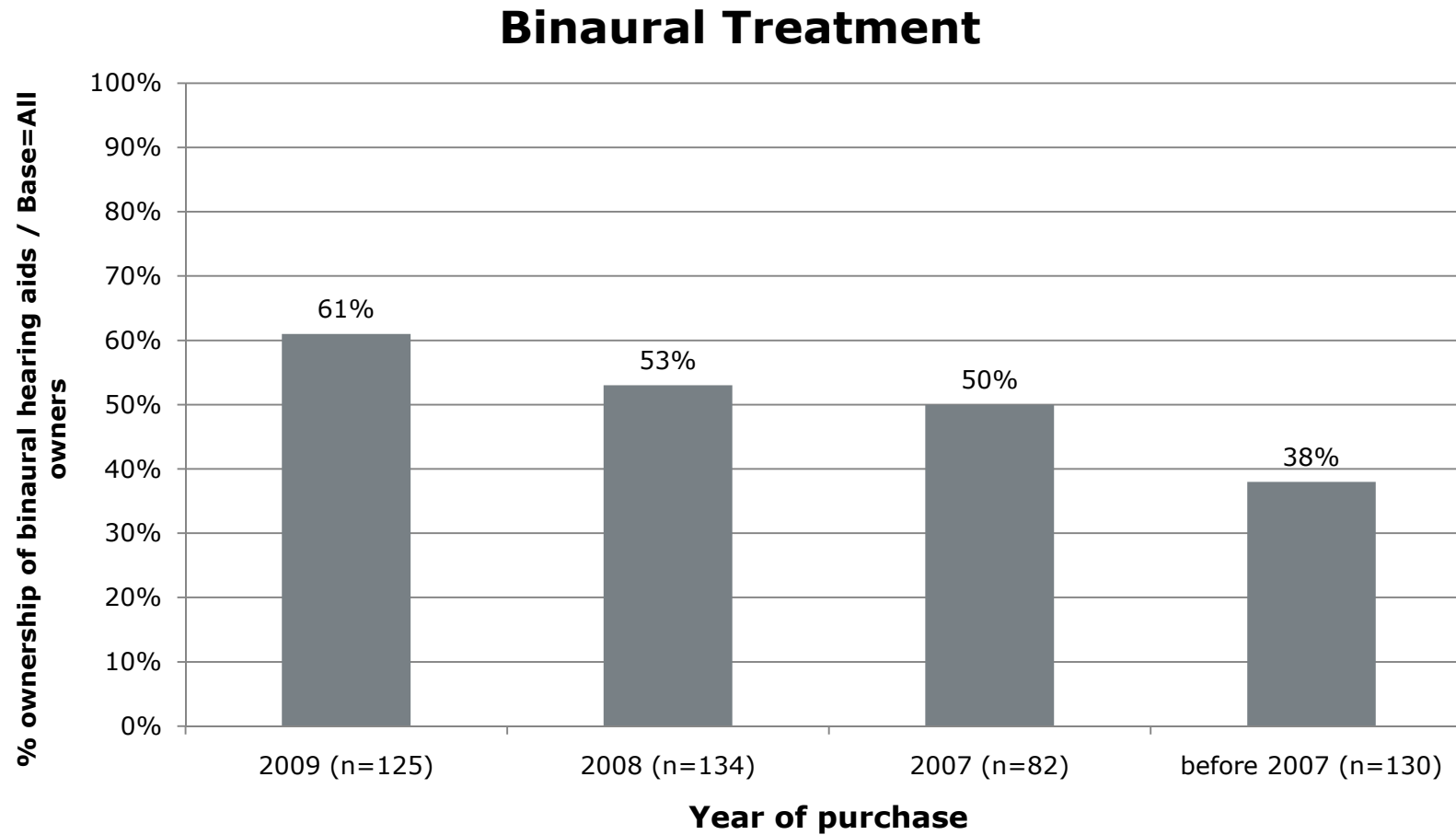
Repair required for current HA



HA-owner, n=513



# Monaural-binaural treatment by purchase date

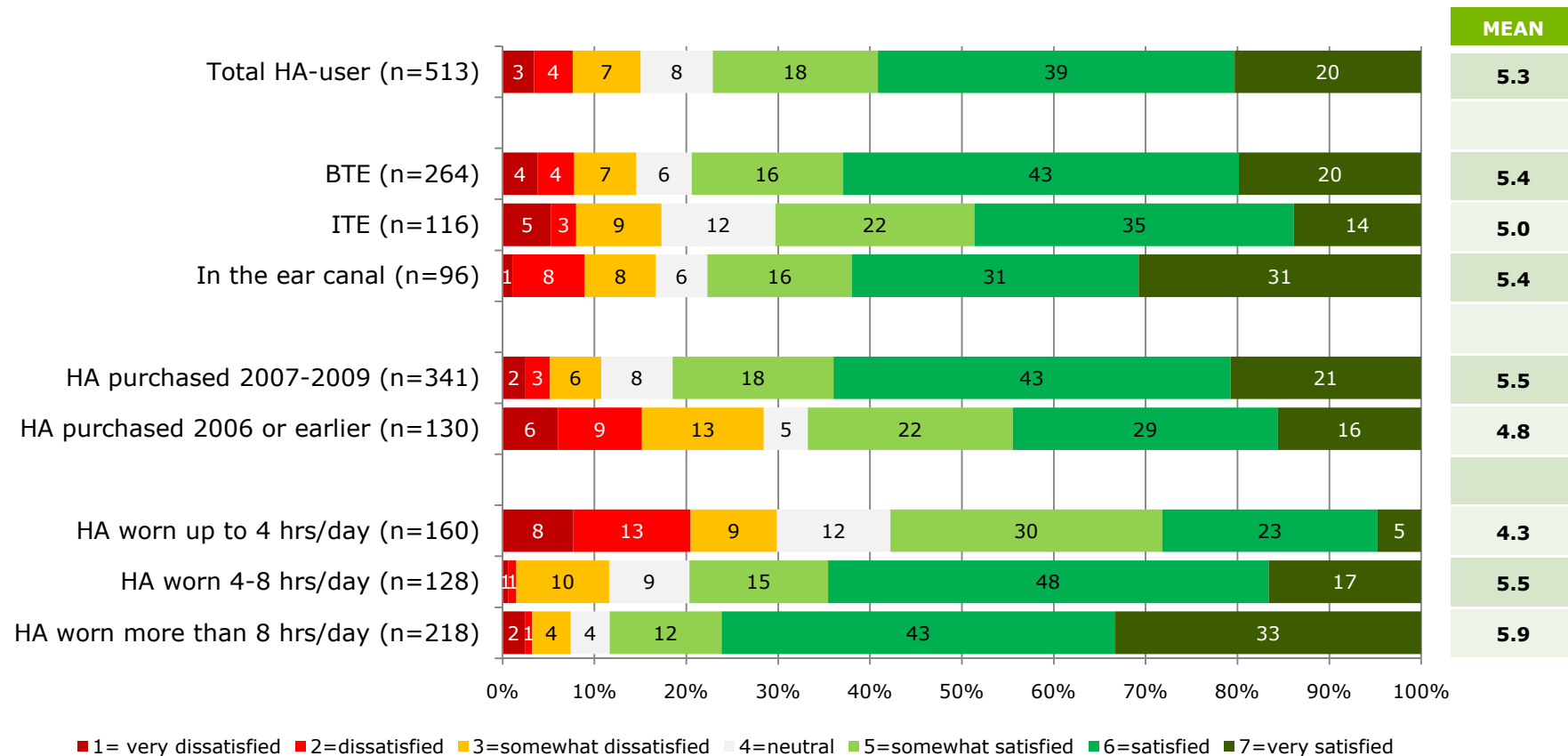


# Satisfaction with HA

---



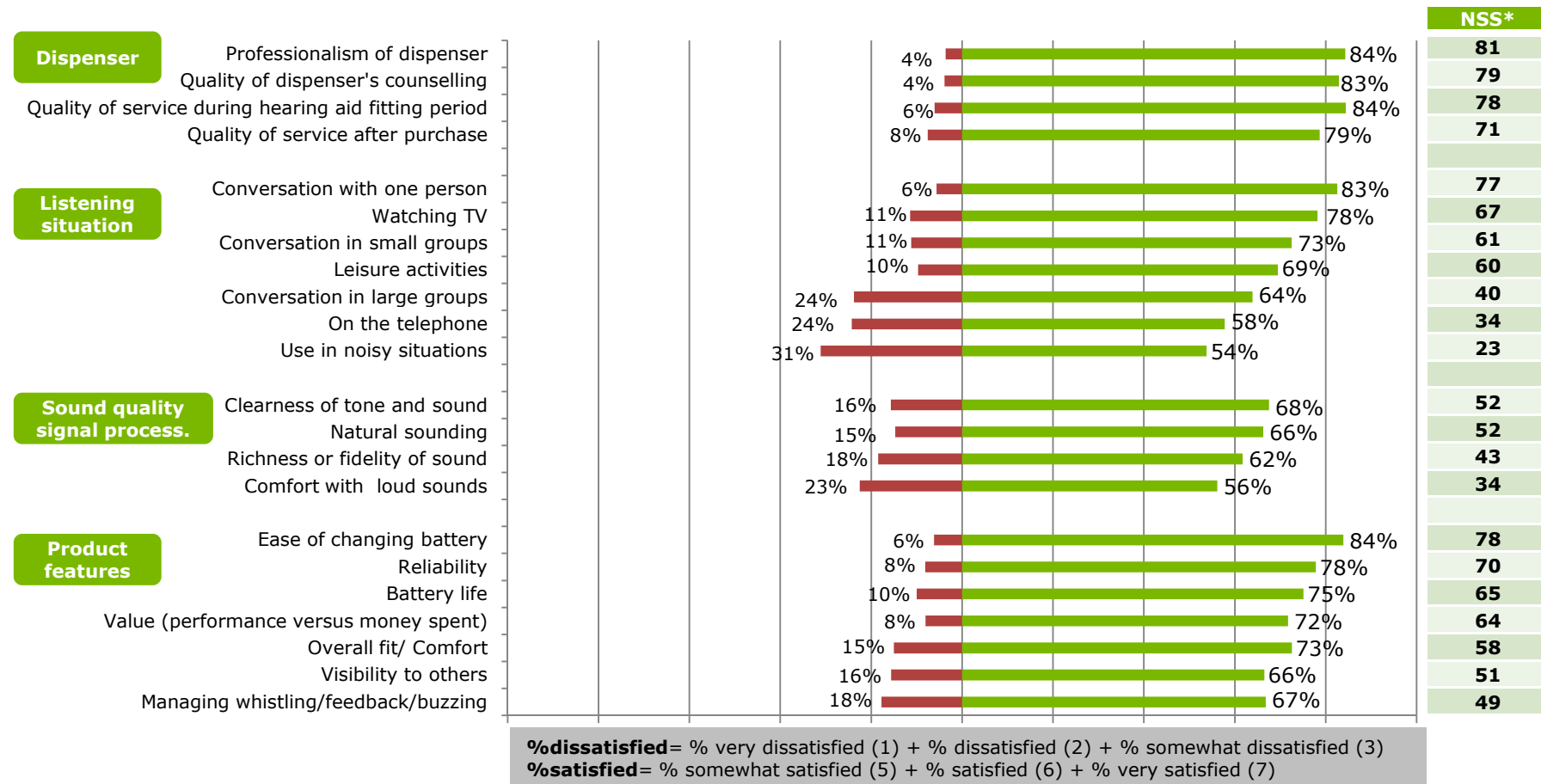
# Overall satisfaction with HA: Highest satisfaction for the following groups: BTEs and In the ear canal, purchased 2007-2009 and worn more than 8 hours a day.



HA-owner, n=513



# Satisfaction with current HA



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

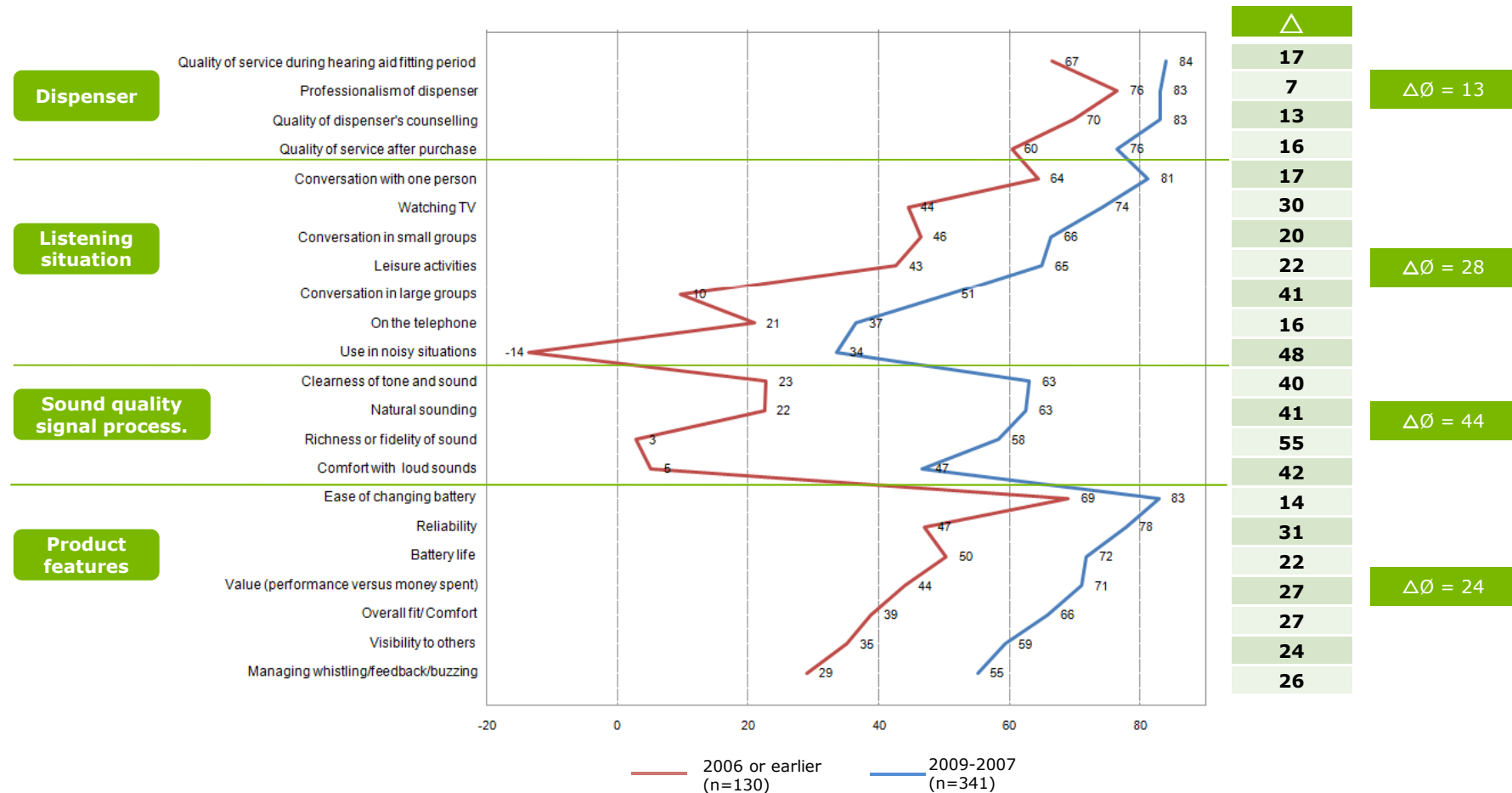
\* NSS can differ from showed difference due to rounding

■ dissatisfied ■ satisfied

HA-owner, n=513



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



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

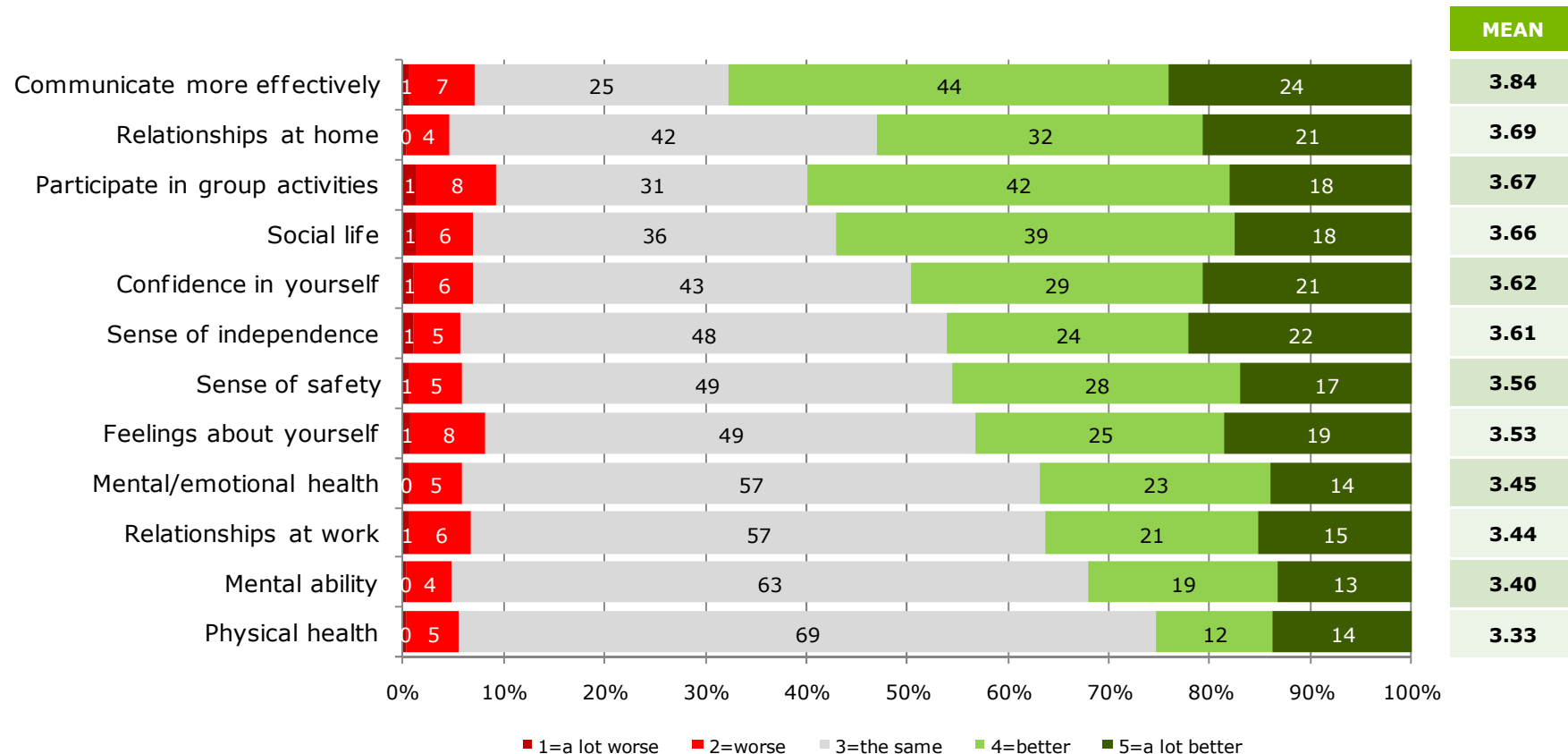


# Positive impact of HAs

---



# Significant positive impact of HAs on different aspects – especially communication effectiveness and relationships at home have improved



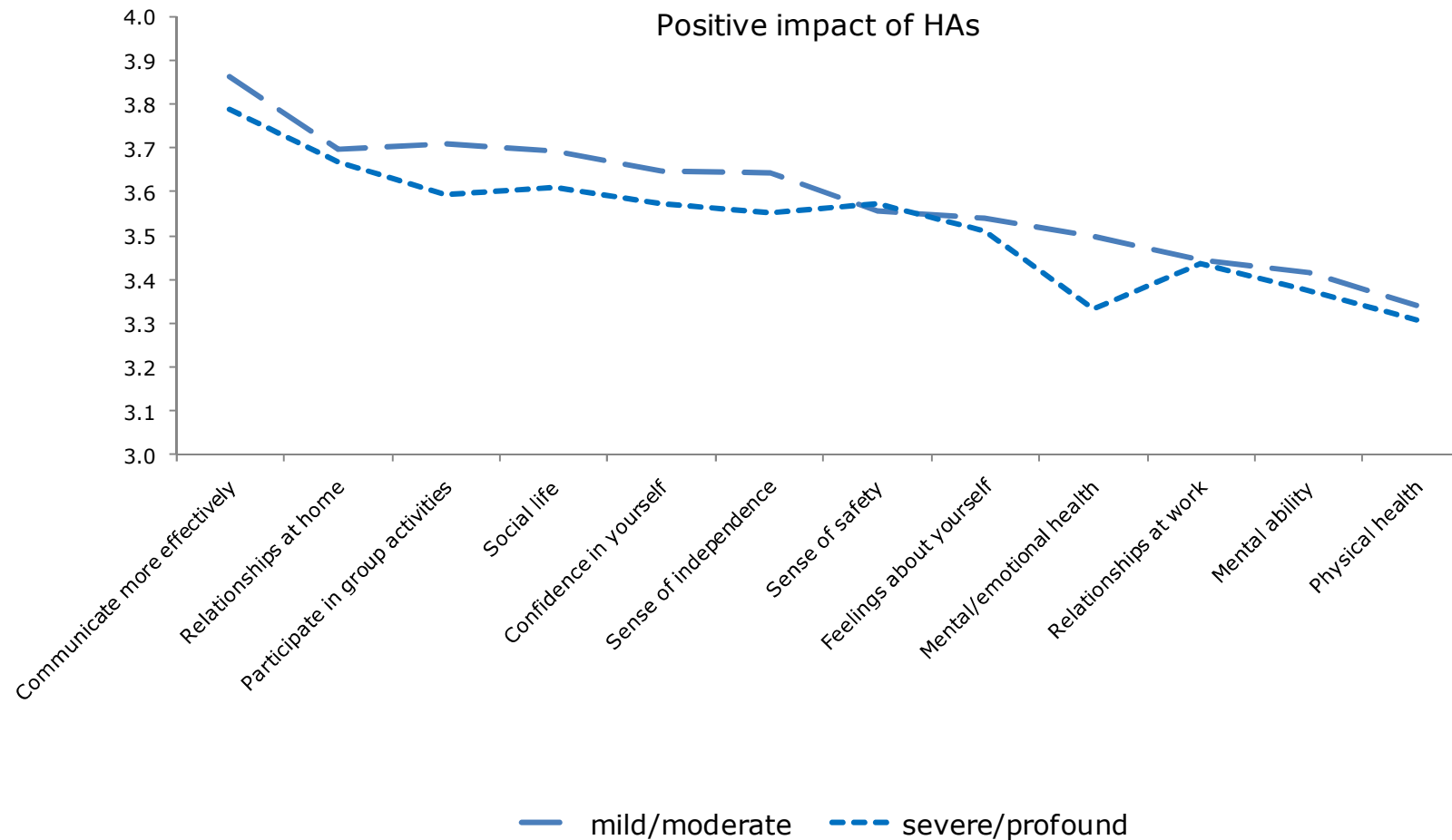
Sorted by descending mean

HA-owner, n=503





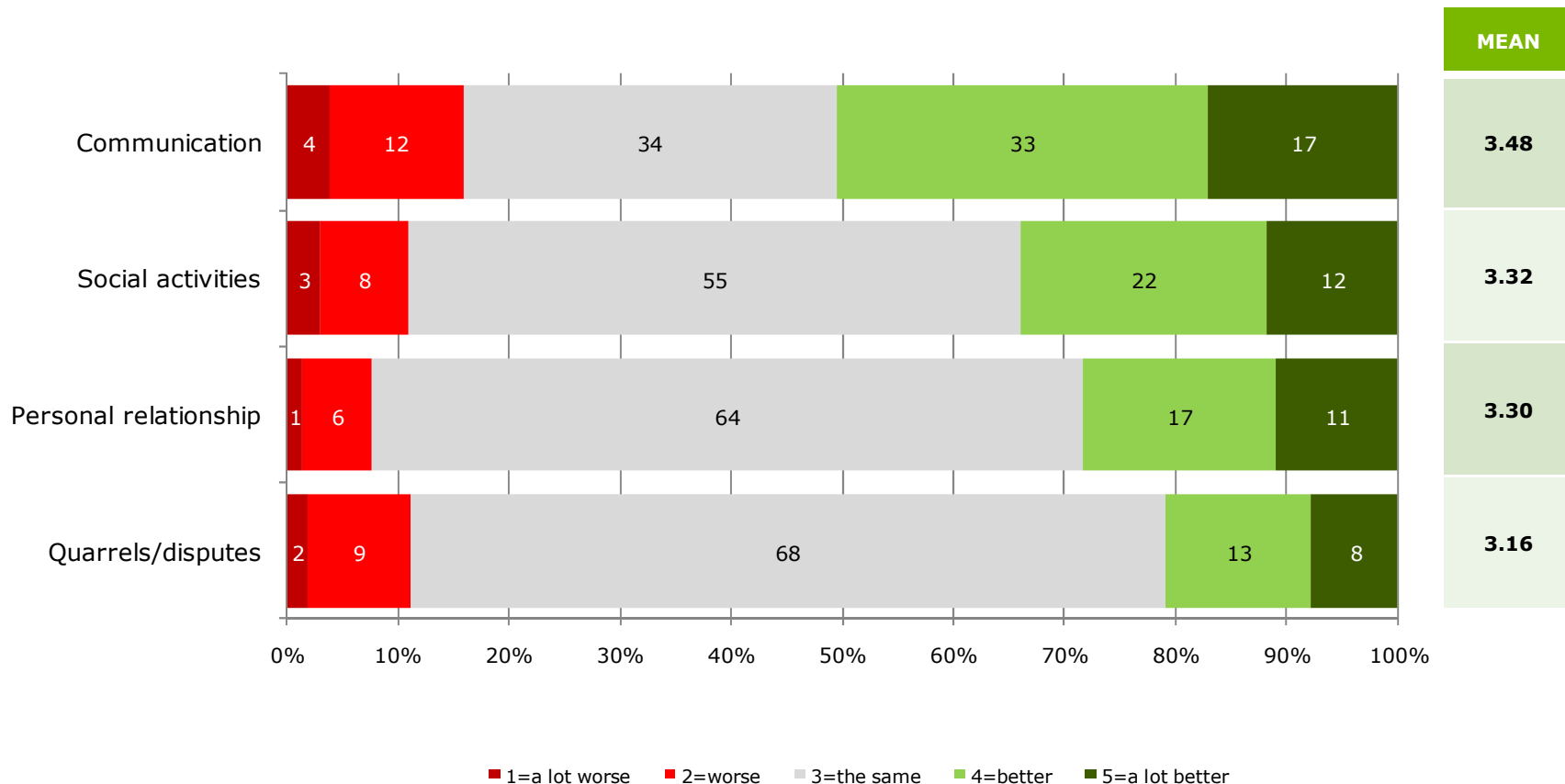
# Impact of HAs is perceived most positive by patients with mild/moderate hearing loss



HA-owner, n=513



For the significant others, the situation has improved, since person in household/parent is wearing hearing aids (especially communication).



Sorted by descending mean

Someone in HH / parent have HA, n=496



---

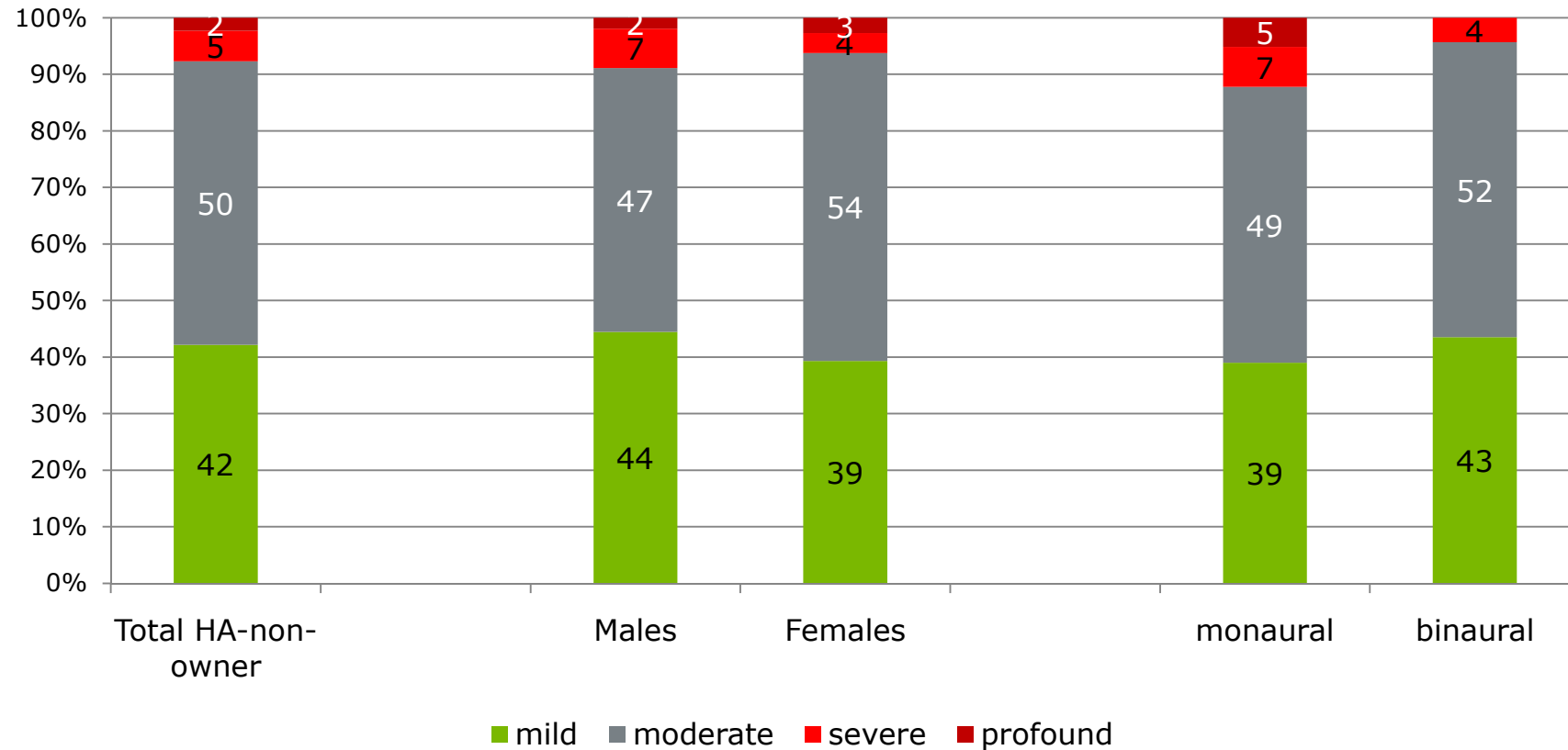
## 4. Analysis of hearing impaired non-owners



# Non-owners: Degree of hearing loss

---

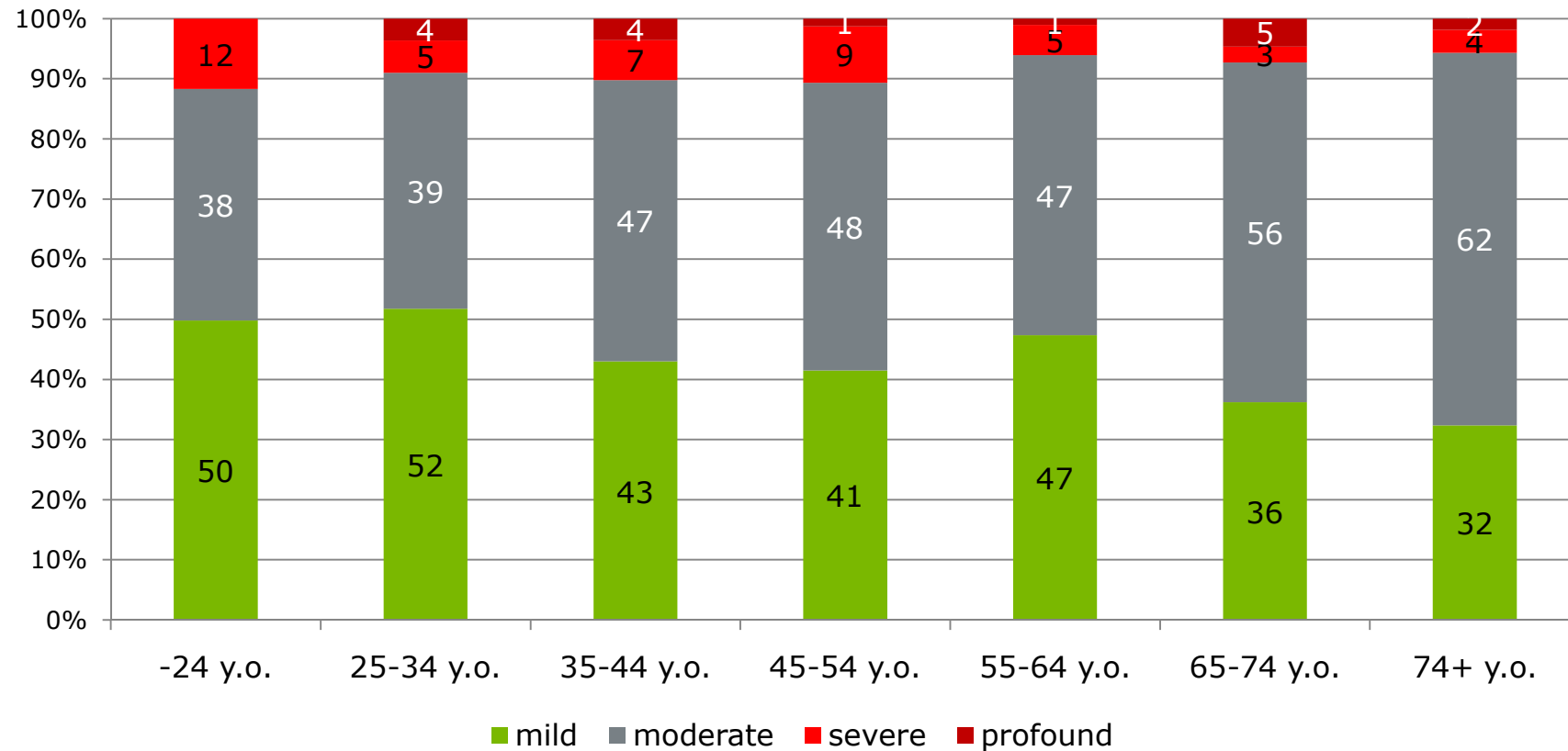
# Subjective hearing loss of HA-non-owners: only 7% have a severe to profound hearing loss



HA-non-owner, n=822



# Subjective hearing loss of HA-non-users by age: increase of severeness is not strictly linear



HA-non-user, n=822

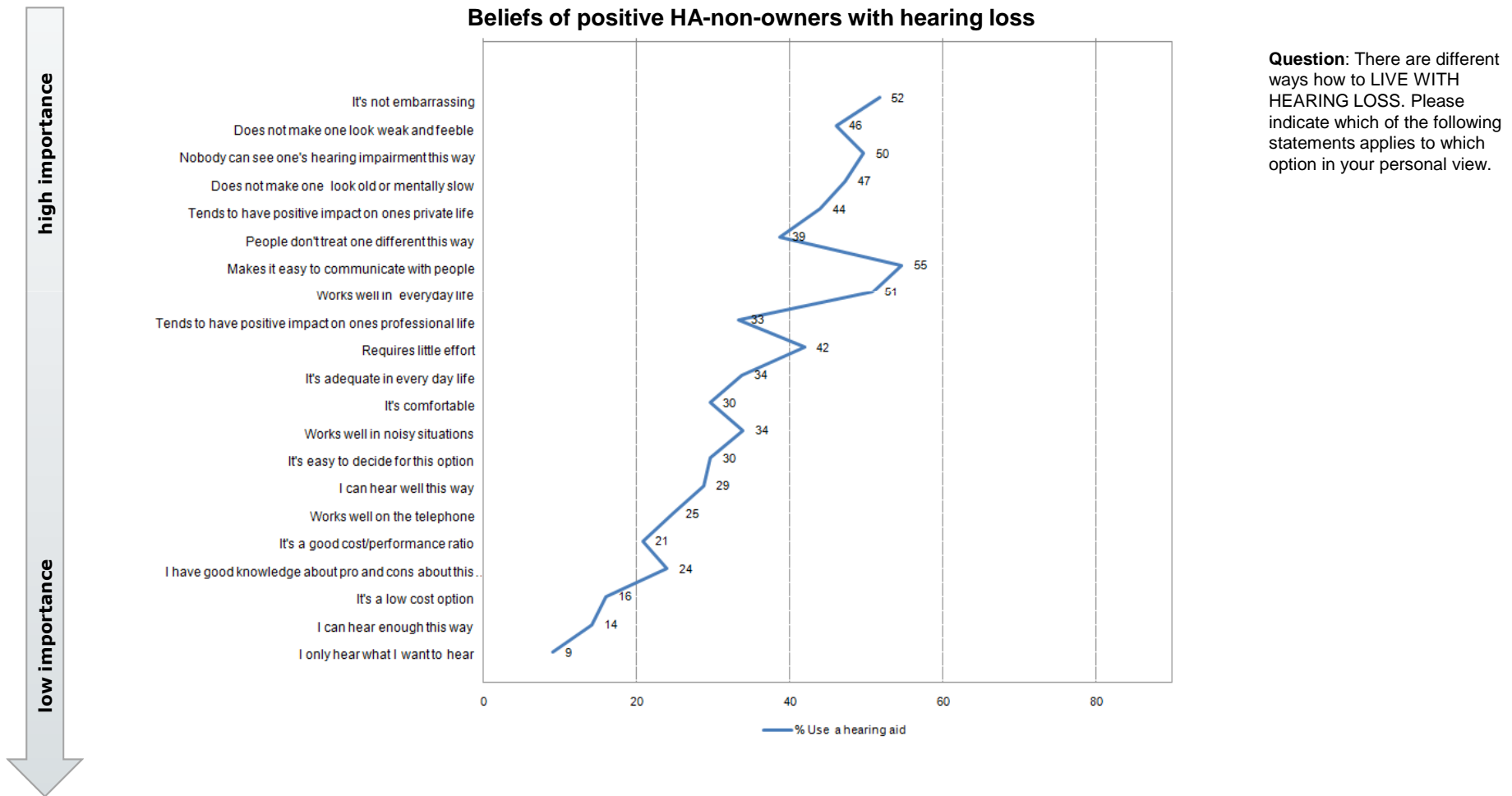


# Non-owners: Drivers

---



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



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

**Read:** In this group, "It's not embarrassing" is the most important criteria. 52% say that "use a hearing aid" is not embarrassing.





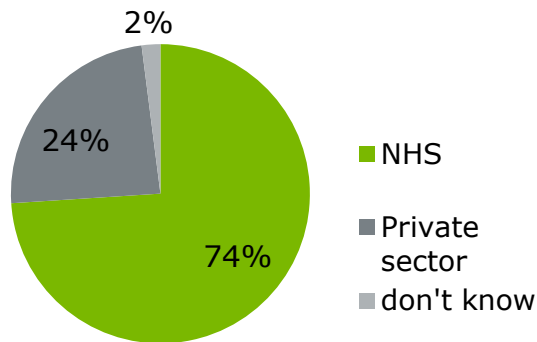
# Reasons not to use hearing aids

---



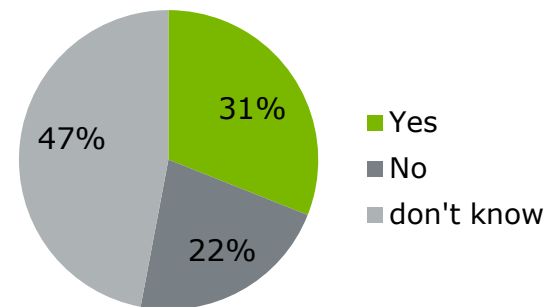
# Information deficit non-owners: 47% don't know whether a third party would pay

**Owners:** Did you purchase your most current hearing aid in the private sector or did you receive a free-of-charge NHS instrument?



HA-owners, n=513

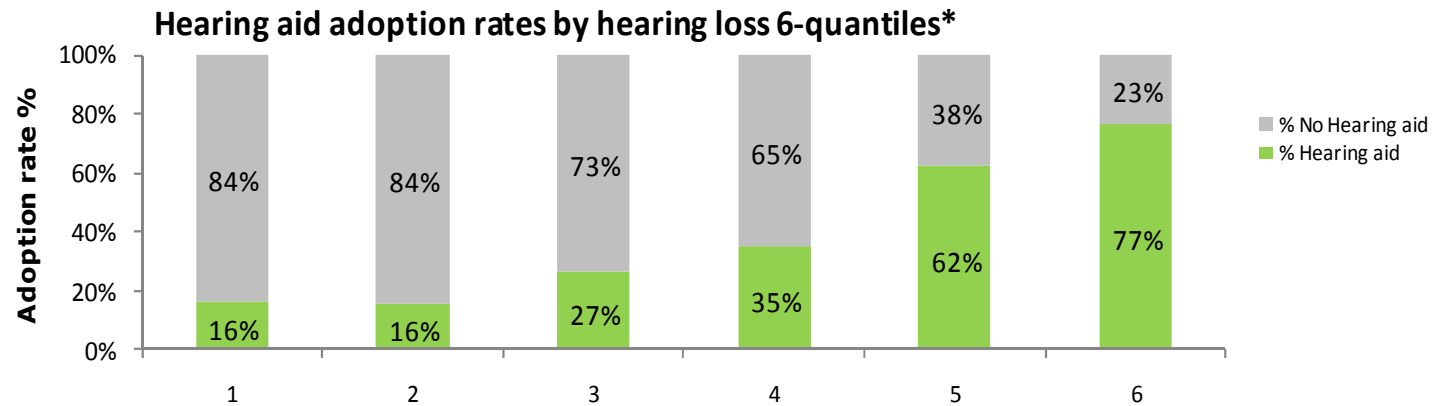
**Non-owners:** Based on your current knowledge, would any part or all of your hearing aid(s) be paid for by a third party? (Insurance, NHS)



HA-non-owners, n=822



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



Hearing loss 6-groups

HA-non-owner, n=822  
HA-owner, n=513

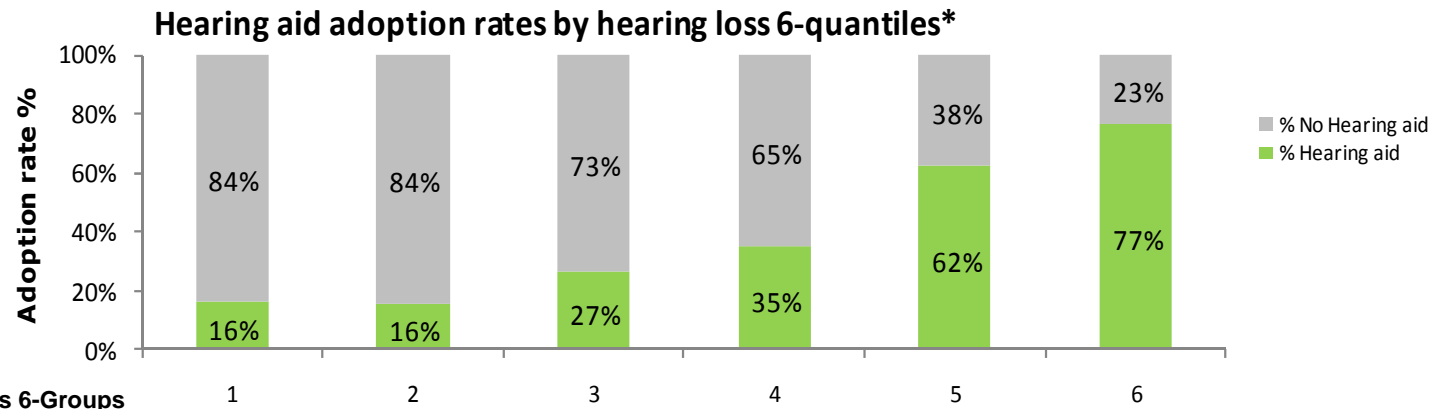
\*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

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



(1): People without HAs: Hearing loss seems only slightly to impact the attitude towards HAs!

(2) People with HAs: The more severe the hearing loss – the higher the commitment to the HAs



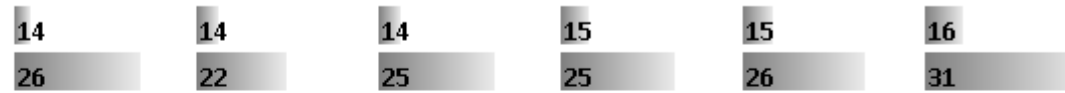
1

**Hearing loss 6-Groups**

**People without hearing aid**

Commitment hearing aid

Commitment live without hearing aid

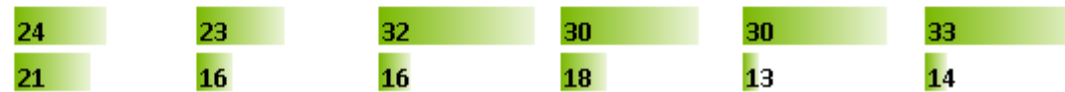


2

**People with hearing aid**

Commitment hearing aid

Commitment live without hearing aid



HA-non-owner, n=822  
HA-owner, n=513

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

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

Commitment is a measure of the attitudinal preference for different options. Based on what respondents answered, a score is calculated that sums up to 100 for every individual over all options. It is known from brand research that this score outperforms other "purchase intent" scores in terms of correlation with real behaviour.



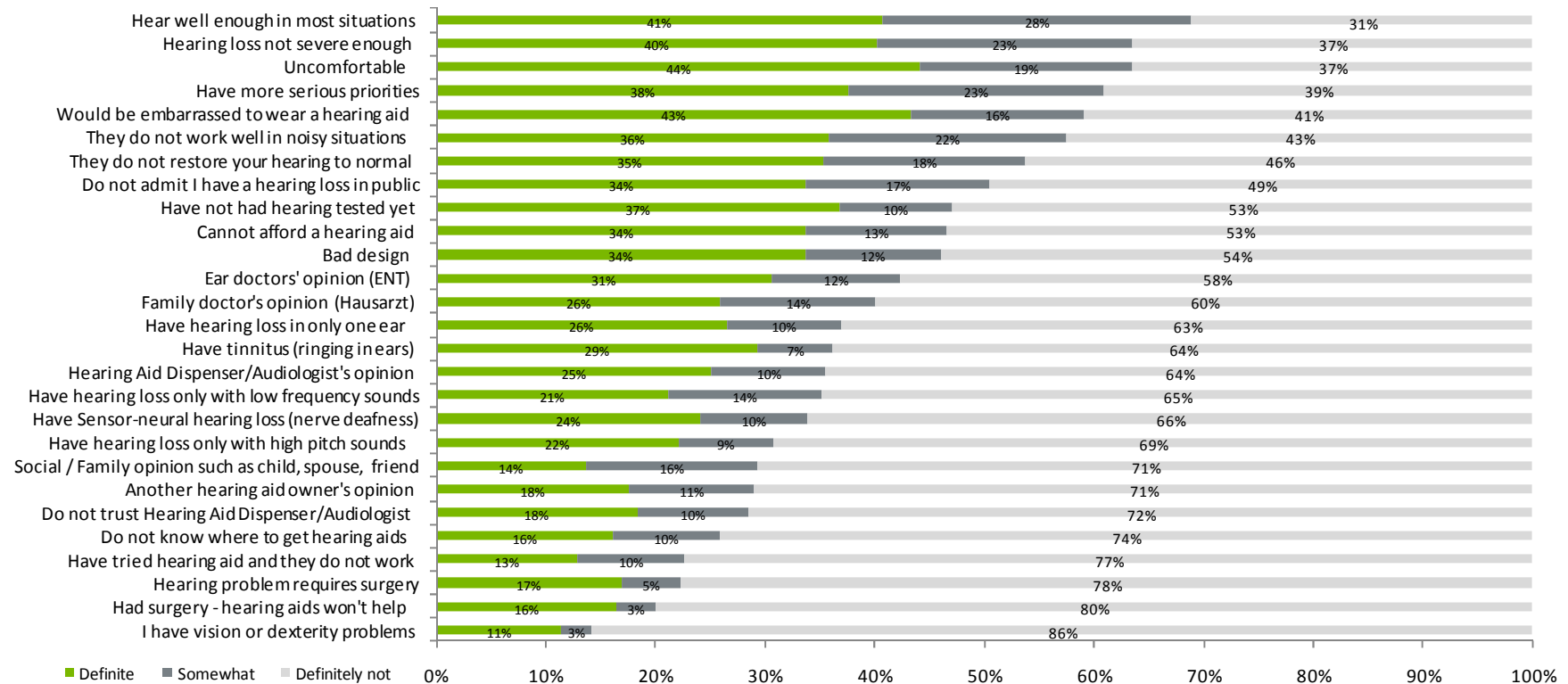
To analyse reasons of non-adoption we look at 6-groups 4-6 as the structure of hearing loss is more similar to that of HA owners

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

|                       | % HA Owner<br>(n=513) | %HA-Non-owner<br>1-3 6-<br>groups          | %HA-Non-owner<br>4-6 6-<br>groups |
|-----------------------|-----------------------|--|-----------------------------------|
| <b>Ears impaired</b>  |                       |  |                                   |
| Unilateral loss       | 33%                   | 51%  | 36%                               |
| Bilateral loss        | 67%                   | 49%  | 64%                               |
|                       |                       | More similar<br>hearing loss-<br>structure |                                   |
| <b>Perceived loss</b> |                       |  |                                   |
| Mild                  | 11%                   | 57%  | 14%                               |
| Moderate              | 57%                   | 40%  | 68%                               |
| Severe                | 29%                   | 2%   | 13%                               |
| Profound              | 3%                    | 1%   | 5%                                |



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

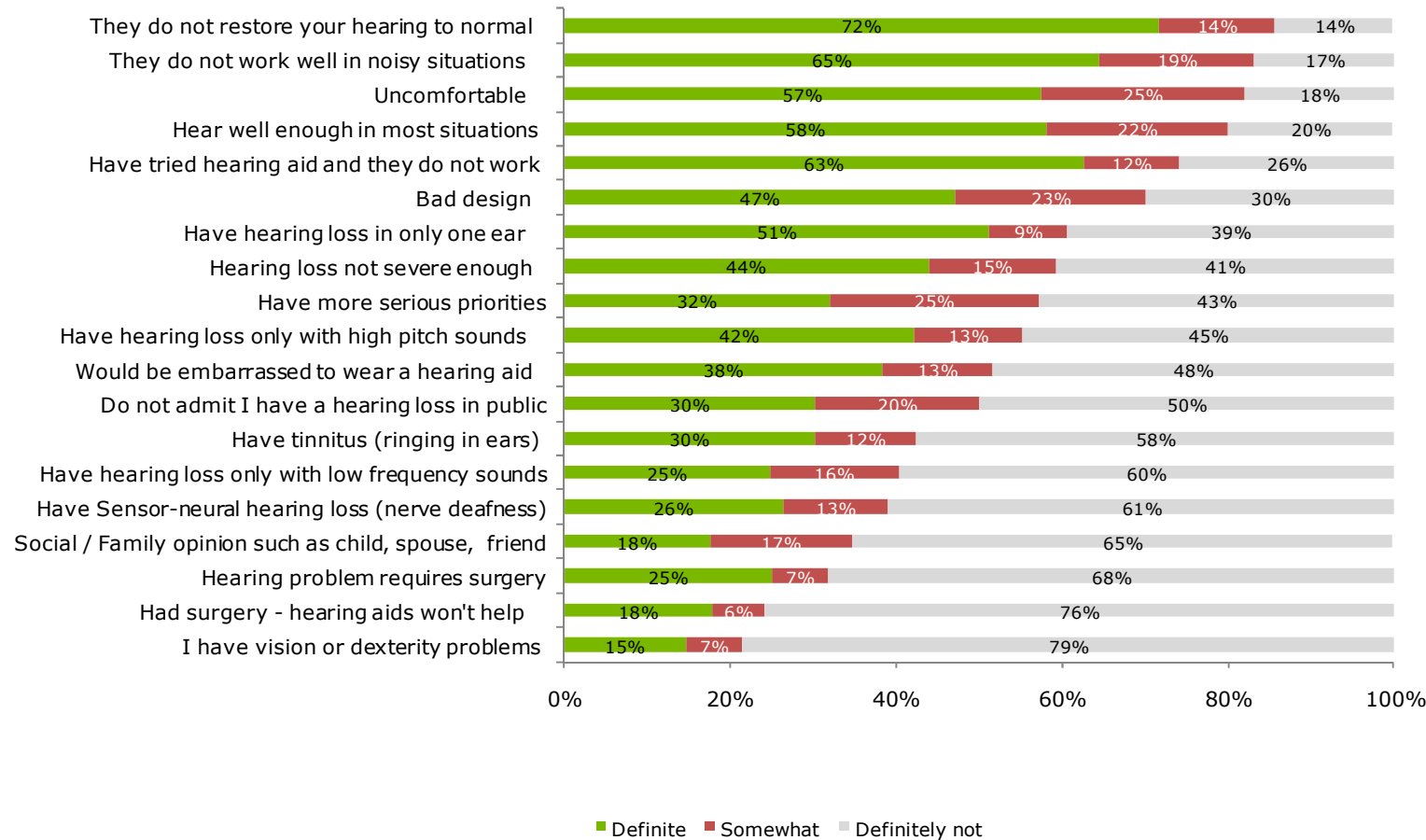


# Reasons not to own hearing aids

| Reason  | Total population (n=822 unweighted) |          |          | 4-6 6-groups (n =268 unweighted) |          |          |
|---|-------------------------------------|----------|----------|----------------------------------|----------|----------|
|   | Definitely not                      | Somewhat | Definite | Definitely not                   | Somewhat | Definite |
| Hear well enough in most situations                   | 19%                                 | 25%      | 55%      | 31%                              | 28%      | 41%      |
| Hearing loss not severe enough                        | 24%                                 | 23%      | 53%      | 37%                              | 23%      | 40%      |
| Uncomfortable   | 37%                                 | 18%      | 45%      | 37%                              | 19%      | 44%      |
| Have more serious priorities                          | 39%                                 | 21%      | 40%      | 39%                              | 23%      | 38%      |
| Would be embarrassed to wear a hearing aid            | 39%                                 | 18%      | 43%      | 41%                              | 16%      | 43%      |
| They do not work well in noisy situations             | 41%                                 | 26%      | 33%      | 43%                              | 22%      | 36%      |
| They do not restore your hearing to normal            | 44%                                 | 20%      | 36%      | 46%                              | 18%      | 35%      |
| Do not admit I have a hearing loss in public          | 46%                                 | 17%      | 37%      | 49%                              | 17%      | 34%      |
| Have not had hearing tested yet                       | 46%                                 | 12%      | 42%      | 53%                              | 10%      | 37%      |
| Cannot afford a hearing aid                           | 59%                                 | 13%      | 29%      | 53%                              | 13%      | 34%      |
| Bad design  | 50%                                 | 17%      | 33%      | 54%                              | 12%      | 34%      |
| Ear doctors' opinion (ENT)                            | 58%                                 | 11%      | 31%      | 58%                              | 12%      | 31%      |
| Family doctor's opinion (Hausarzt)                    | 62%                                 | 13%      | 25%      | 60%                              | 14%      | 26%      |
| Have hearing loss in only one ear                     | 57%                                 | 14%      | 29%      | 63%                              | 10%      | 26%      |
| Have tinnitus (ringing in ears)                       | 66%                                 | 10%      | 24%      | 64%                              | 7%       | 29%      |
| Hearing Aid Dispenser/Audiologist's opinion           | 66%                                 | 11%      | 24%      | 64%                              | 10%      | 25%      |
| Have hearing loss only with low frequency sounds      | 64%                                 | 17%      | 19%      | 65%                              | 14%      | 21%      |
| Have Sensor-neural hearing loss (nerve deafness)      | 71%                                 | 9%       | 20%      | 66%                              | 10%      | 24%      |
| Have hearing loss only with high pitch sounds         | 68%                                 | 10%      | 22%      | 69%                              | 9%       | 22%      |
| Social / Family opinion such as child, spouse, friend | 69%                                 | 16%      | 15%      | 71%                              | 16%      | 14%      |
| Another hearing aid owner's opinion                   | 69%                                 | 15%      | 16%      | 71%                              | 11%      | 18%      |
| Do not trust Hearing Aid Dispenser/Audiologist        | 76%                                 | 9%       | 15%      | 72%                              | 10%      | 18%      |
| Do not know where to get hearing aids                 | 75%                                 | 10%      | 15%      | 74%                              | 10%      | 16%      |
| Have tried hearing aid and they do not work           | 79%                                 | 8%       | 13%      | 77%                              | 10%      | 13%      |
| Hearing problem requires surgery                      | 76%                                 | 9%       | 15%      | 78%                              | 5%       | 17%      |
| Had surgery - hearing aids won't help                 | 80%                                 | 6%       | 14%      | 80%                              | 3%       | 16%      |
| I have vision or dexterity problems                   | 83%                                 | 8%       | 8%       | 86%                              | 3%       | 11%      |



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



Owners who don't use, n=57





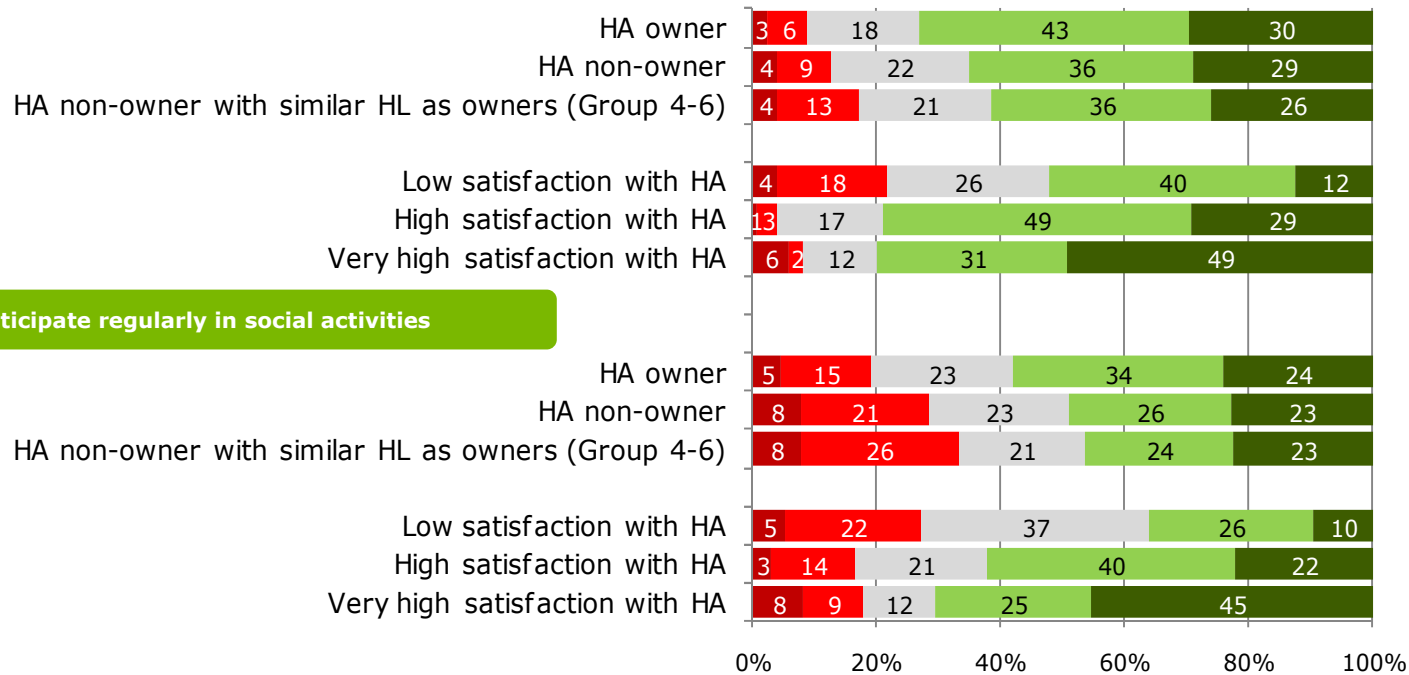
# Negative impact of hearing loss

---



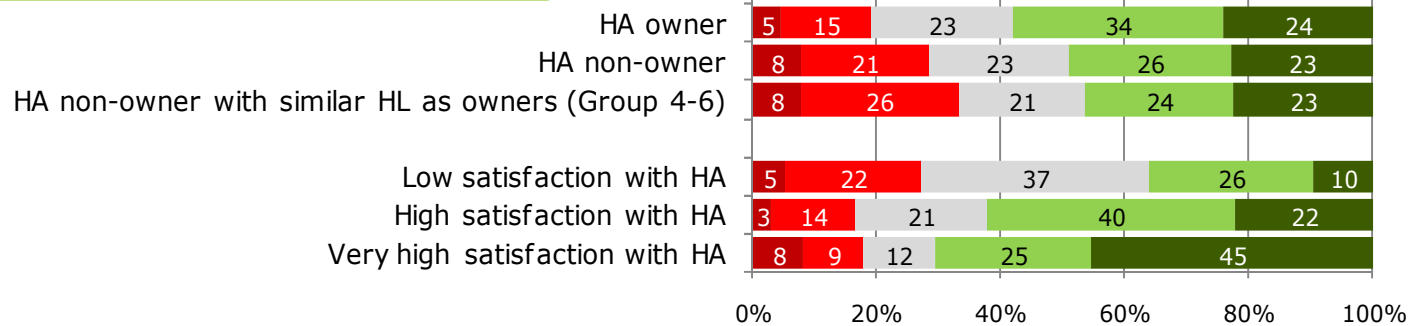
# Hearing impaired non-owners tend to feel less sound and safe and participate less in social activity compared to satisfied hearing aid-owners.

## Generally I feel safe and sound



| MEAN |
|------|
| 3.91 |
| 3.77 |
| 3.66 |
| 3.39 |
| 4.03 |
| 4.15 |
| 3.58 |
| 3.36 |
| 3.28 |
| 3.13 |
| 3.65 |
| 3.90 |

## I participate regularly in social activities



■ 1=disagree strongly      ■ 2=disagree  
 ■ 3=neither agree nor disagree      ■ 4=agree  
 ■ 5=strongly agree

HA-non-owner, n=822  
 HA-owner, n=513



# Acquiring intentions

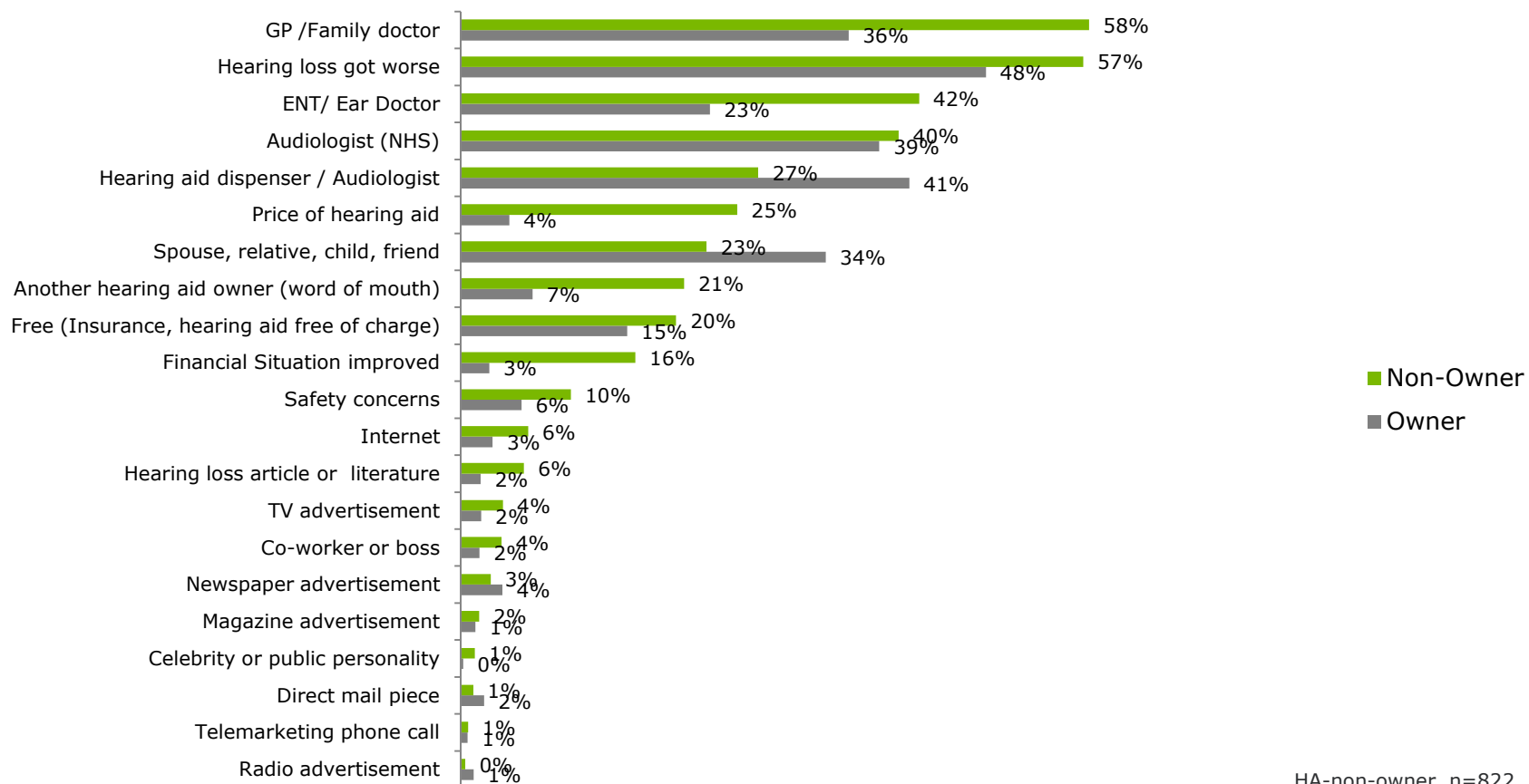
---



What non-owners say would influence them to buy is not necessarily what owners say influenced them to buy. The most important influencing factors are worse hearing loss, GP, ENT and audiologist.

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

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



HA-non-owner, n=822  
HA-owner, n=513





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

Anovum GmbH  
Sumatrastrasse 25  
CH-8006 Zürich

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

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



**Christian Egger** lic. phil.

Anovum GmbH  
Sumatrastrasse 25  
CH-8006 Zürich

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

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



**EHIMA**  
European Hearing Instrument  
Manufacturers Association

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

