

## Results

# JapanTrak 2018

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



# Japan specific findings

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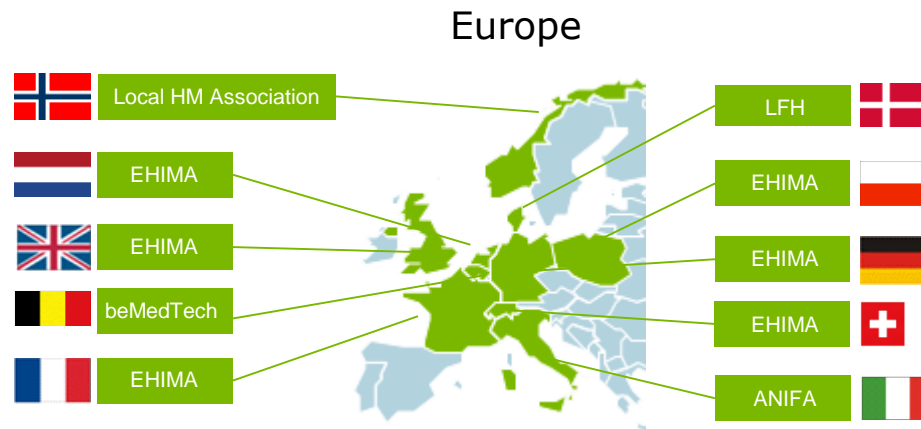
- ***Satisfaction with hearing aids purchased at hearing aid centers is higher than with those purchased elsewhere.***
- ***Satisfaction with hearing aids bought on the internet is devastating.***
- ***Most people with only one hearing aid believe it is the same effect compared with two hearing aids... but***
- ***Binaural treatment leads to much higher satisfaction, longer use time per day and less unused hearing aids.***
- ***Those hearing impaired who own PSAP/OTC hearing aids believe that it is reasonable for their purposes... but***
- ***Satisfaction with medical hearing devices fitted by a hearing care professional is much higher.***



# Summary

## 1. Introduction

- JapanTrak 2018 was designed and executed by Anovum (Zurich) on behalf of Japan Hearing Instruments Manufacturers Association (JHIMA).
- Sample sizes Japan 2018:
  - Representative sample (sample 1): n= 13'710 people
  - Hearing impaired (sample 2): n=1'306 people
    - Hearing impaired non-owners: n= 885 people with hearing loss (**HL**)
    - HA owners: n= 421 people with hearing aid (**HA**)
- JapanTrak 2018 is equivalent to the EuroTrak studies:



# Summary

## 2. Market overview

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- Stated hearing loss prevalence
  - Total: 11.3 %, 18+: 13.2% (stable since 2012).
  - Binaural hearing loss: HA owners: 80%, HA non-owners: 56%.
  - Hearing Tests: 53% (2015: 51%) had a hearing test in the last 5 years, most tests done by ENTs and family doctors but also during health checks at hospitals.
- Hearing aid adoption rate (HA penetration)
  - Total: 14.4% (2015: 13.5%).
  - Total age group 18+: 14.2% (2015: 12.8%).
  - 45% of HA owners have binaural treatment.
- The route to the hearing aid
  - 42% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 14% got hearing aids recommended from the ENT or family doctor (drop out rate=58%).
  - 15% of the GP consultations referred to a hearing aid dispenser, 17% referred to an ENT
  - 56% recommended no action!
  - 17% of ENT consultations referred to a hearing aid dispenser, 67% recommended no action!
- Potential social cost-savings due to the use of hearing aids
  - Hearing aids are believed to have a positive impact on the job.
  - Quality of sleep seems to improve if hearing impaired use hearing aids.

# Summary

## 3. Analysis of hearing aid owners

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- Hearing aid ownership and usage and accessories
  - 12% (2015: 15%) of all HA owners received some kind of 3<sup>rd</sup> party reimbursement.
  - 43% of the currently owned HAs were bought in the last two years
  - The average age of the currently owned HAs is 3.5 years (2015: 4.1 years).
  - The median age of hearing aids before replacement remains at 5 years.
  - On average, HAs are worn 7.6 hours a day (2015:6.8 / 2012: 5.7).
  - 47% of today's hearing aid owners are aware of their hearing aid brand.
- Satisfaction with HAs
  - 66% of the hearing aid owners say their hearing aid works better than or as expected, 34% say they are worse than expected.
  - Overall satisfaction with HA is 38% (2015: 39% / 2012: 36%).
  - Talking on a phone and talking at home with family members are the most frequent important listening situations.
- Positive impact of HAs
  - Significant positive impact of HAs on different aspects – especially sense of safety, communication and feelings about yourself.
  - 89% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

# Summary

## 4. Analysis of hearing impaired non-owners

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- Reasons not to own/use HAs
  - Only 7% of the hearing impaired without hearing aids know the system of supplying hearing aid(s) by the government.
  - The main reasons for not using hearing aids are that people say they are uncomfortable, they do not restore hearing to normal and their hearing loss is not severe enough.
  - Uncomfortable means to them: “foreign object in the ear, it pinches, it hurts, it is too big. / “not necessary yet in daily life”
  - 7% who own HAs don’t use them at all (0 hour); 17% use them less than one hour/day (0-1 hour).
- Social rejection, and triggers to buy
  - 75% of hearing aid owners think people don’t make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aids.
  - The most important influencing factors for getting hearing aids are worsening hearing loss, ENT. Price of hearing aids is only relevant for the non owners.

## Results

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# Detailed Results: Roadmap

**New topics for JapanTrak 2018 are highlighted in red**

\*  Japan specific question Japan specific topics are highlighted with '\*'

## 1. Introduction

- Organization of JapanTrak 2018
- 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
  - \* **Awareness of specialized shops, professions and organizations**
- Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality, **co-morbidities**

## 3. Analysis of hearing aid owners

- Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
  - \* **Age when felt need for hearing aids**
  - **Reasons for getting hearing aids sooner**
  - **Channels for getting hearing aids, recommendation of channel (NPS)**
  - **Awareness and usage of accessories**
  - \* **Fitting process and price**
- Satisfaction with hearing aids and drivers
  - \* **Reasons for and satisfaction with binaural fitting**
  - \* **Satisfaction compared: By place of purchase, type of device and fitting**
- 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 and why some people can consider hearing aids as uncomfortable
- 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





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# 1. Introduction



# Organization of JapanTrak 2018

## Organization

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

## Use of the data

- The principal as well as the JHIMA companies may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.
- The raw dataset remains at Anovum. If the principal or the JHIMA companies use the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:  
**“Source: Anovum – JapanTrak 2018/n=[relevant sample size]”**
- The principal and JHIMA companies can ask Anovum to further analyze the raw data in specific ways at their own expense.

# Recruitment process: In search of hearing impaired people

## Step 1: Screening interviews

Objective: Prevalence of hearing loss and hearing aid ownership

Process:

1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)
2. Contacts from panellist pools of more than 40'000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n= 13'710** 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=421** hearing aid owners and **n=885** hearing impaired non-owners



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## 2. Market overview



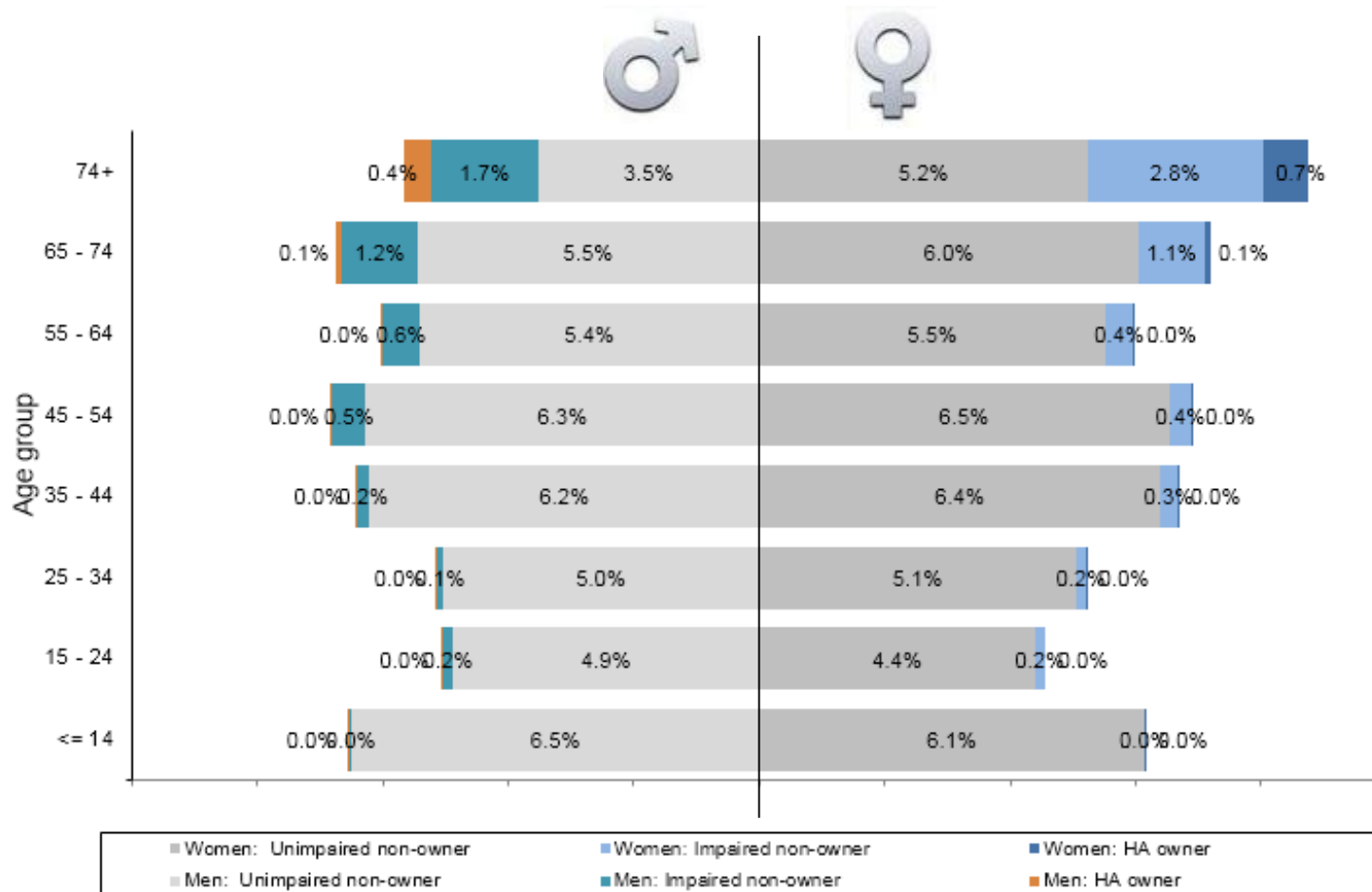


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# Prevalence of hearing loss and adoption rate

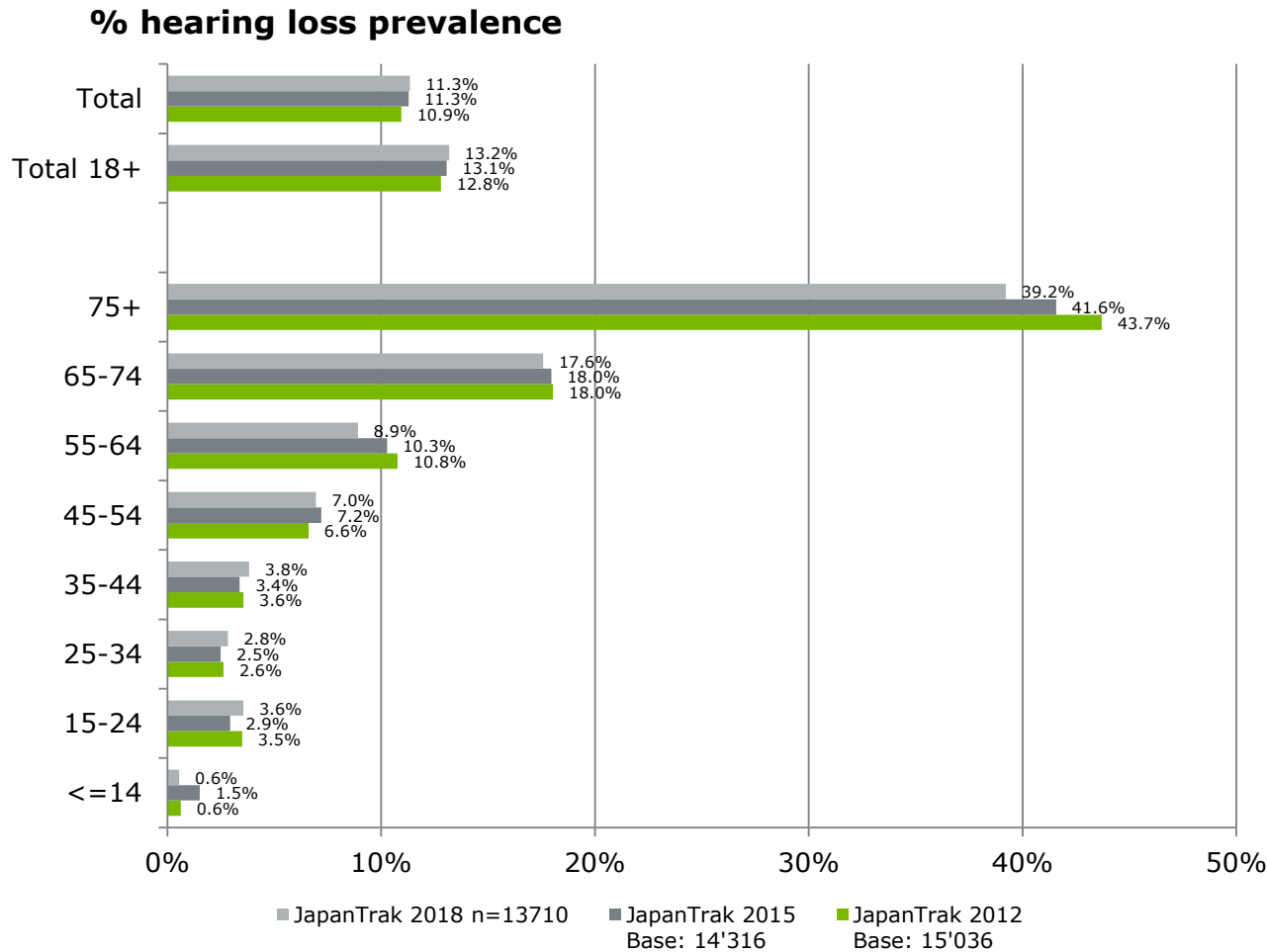


# Hearing loss and hearing instrument ownership by gender/age

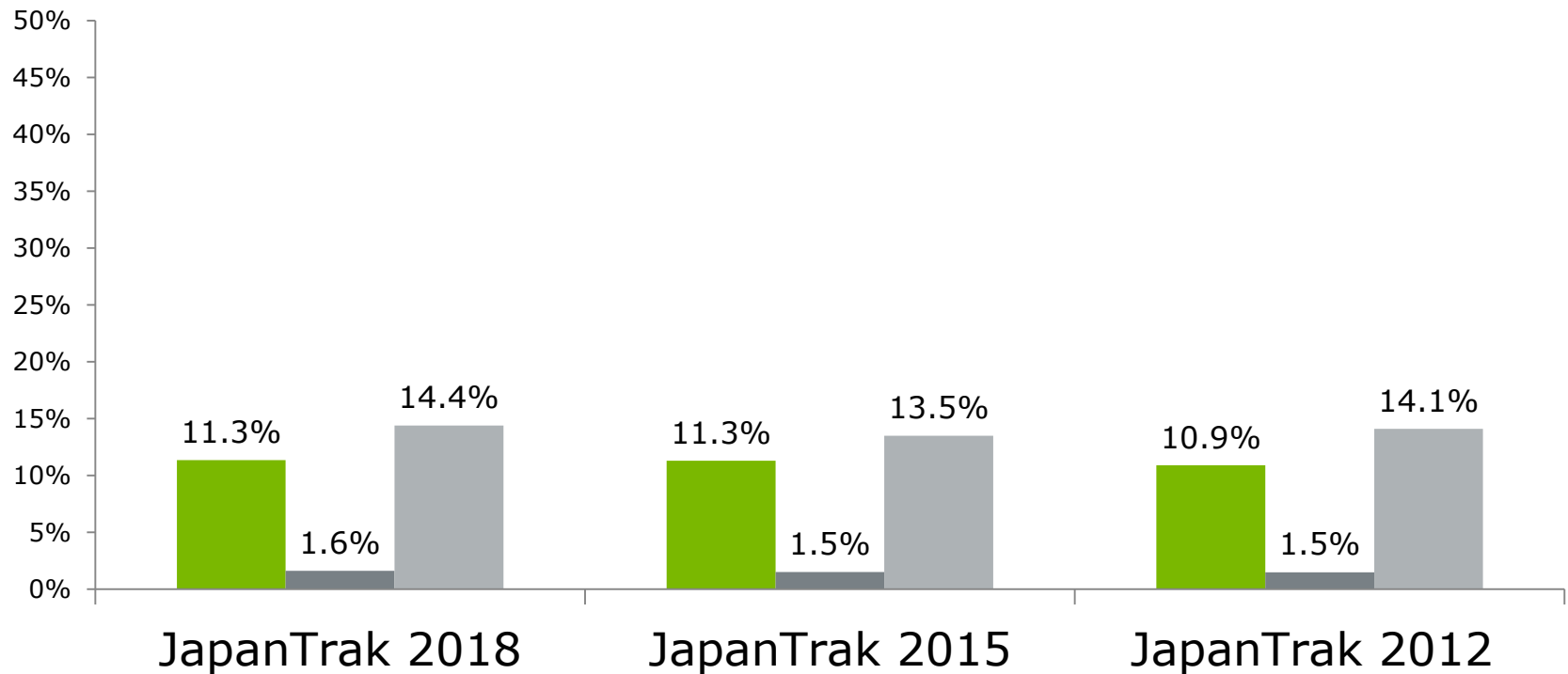


Sample based on census data 2018 projection

# Hearing loss prevalence Japan



# Overview hearing loss prevalence and hearing aid adoption

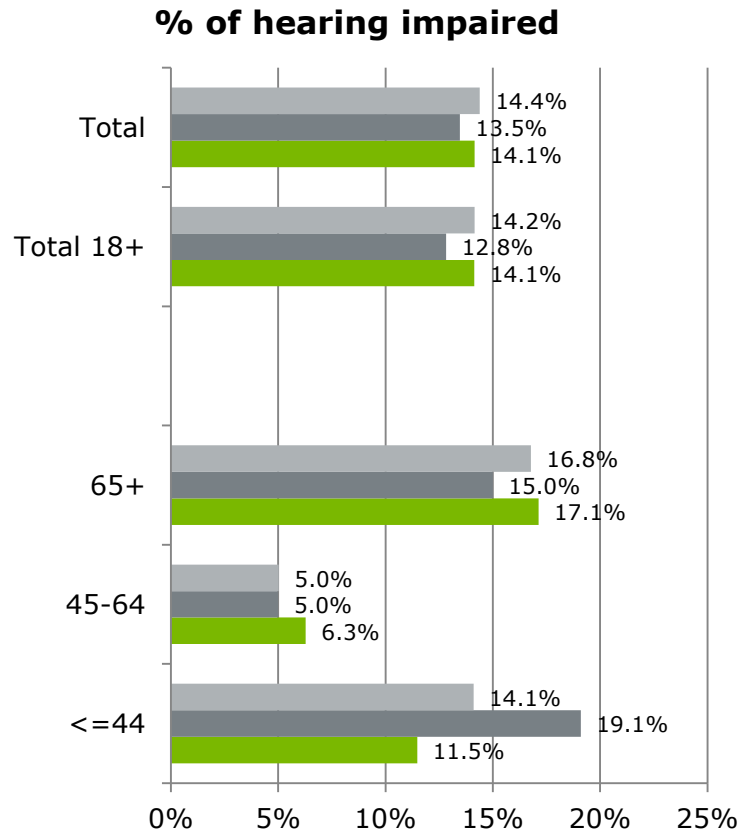


■ Hearing impaired (stated) ■ Adoption (% of population) ■ Adoption (% of stated impaired)

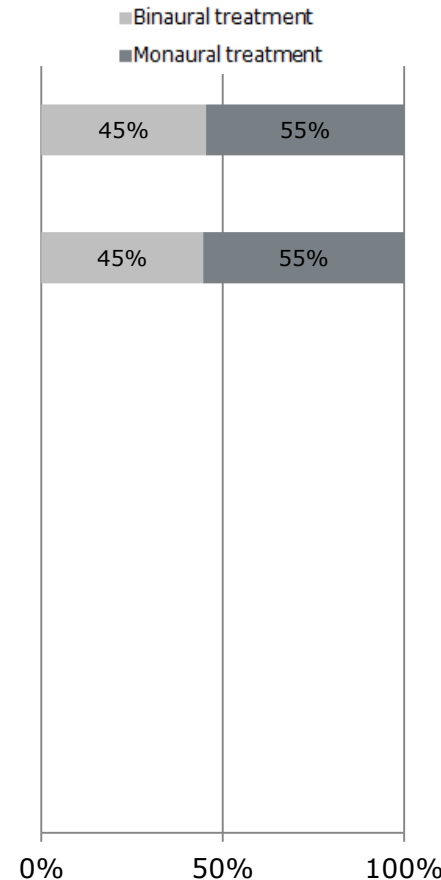




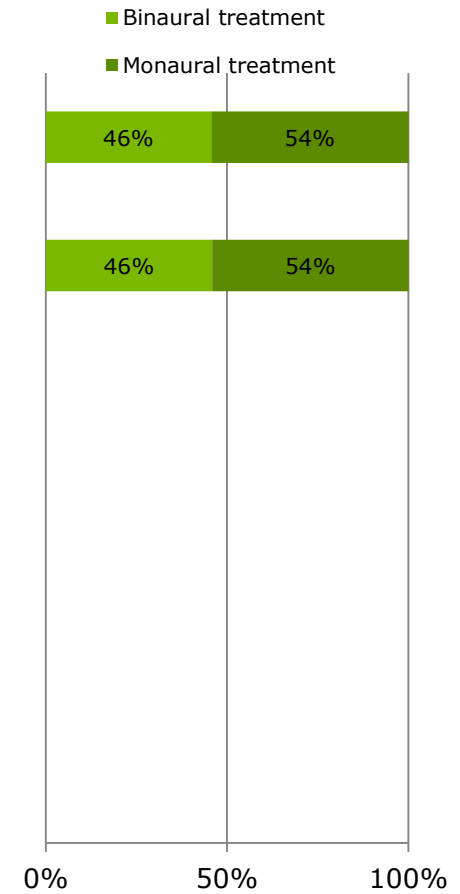
# Hearing aid adoption rate Japan: 14% (rounded) of hearing impaired have hearing aid(s), 45% of them have binaural treatment



■ JapanTrak 2018 ■ JapanTrak 2015 ■ JapanTrak 2012  
Base: 1'705 Base: 1'783 Base: 1'860



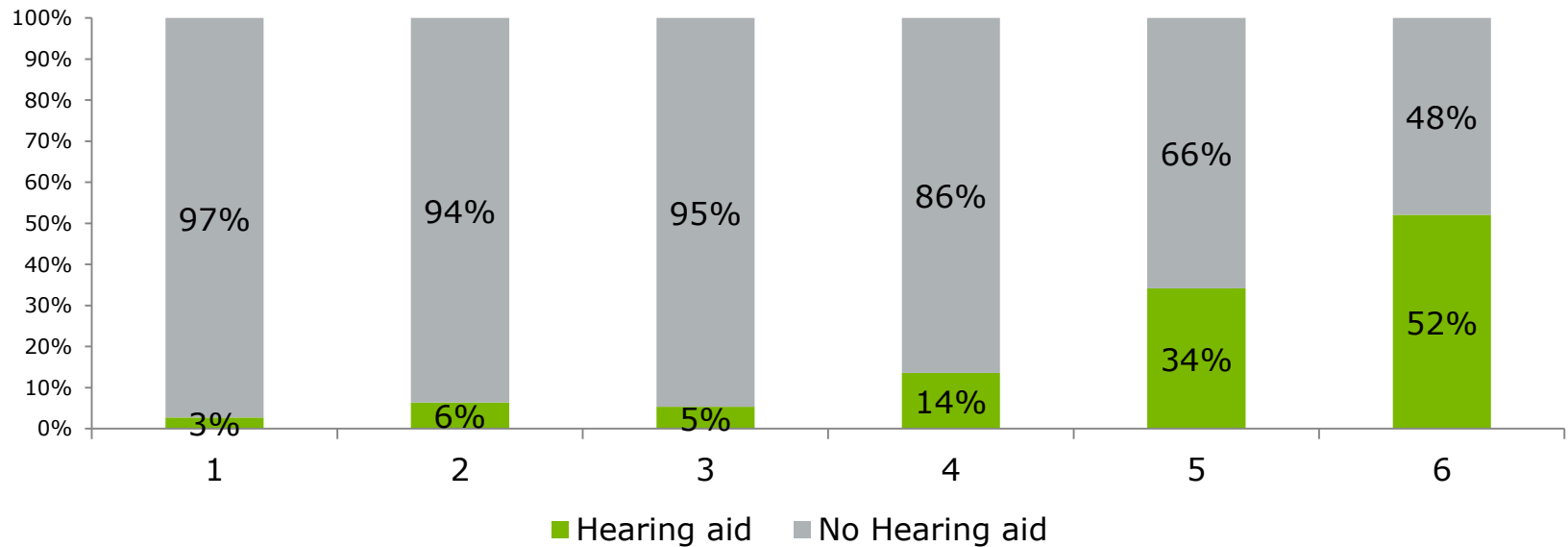
JapanTrak 2018  
HA owners (Base:224 – step1)



JapanTrak 2015  
HA owners (Base:218 – step1)



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



Hearing loss 6-groups

HA-non-owner, n=557  
HA-owner, n=394

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

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



# Hearing loss

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

	<b>HA-Non-owner</b> 2018: n=754 (2015: n=890)	<b>HA Owner</b> 2018: n=417 (2015: n=416)	<b>Hearing Aid Adoption (%)</b>
<b>Ears impaired (stated)</b>			
Unilateral loss	44% (40%)	20% (17%)	8% (8%)
Bilateral loss	56% (60%)	80% (83%)	22% (21%)
<b>Perceived loss</b>			
Mild	42% (44%)	24% (18%)	10% (7%)
Moderate	52% (48%)	51% (54%)	15% (17%)
Severe	4% (7%)	17% (23%)	43%* (37%)
Profound	1% (1%)	7% (5%)	

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



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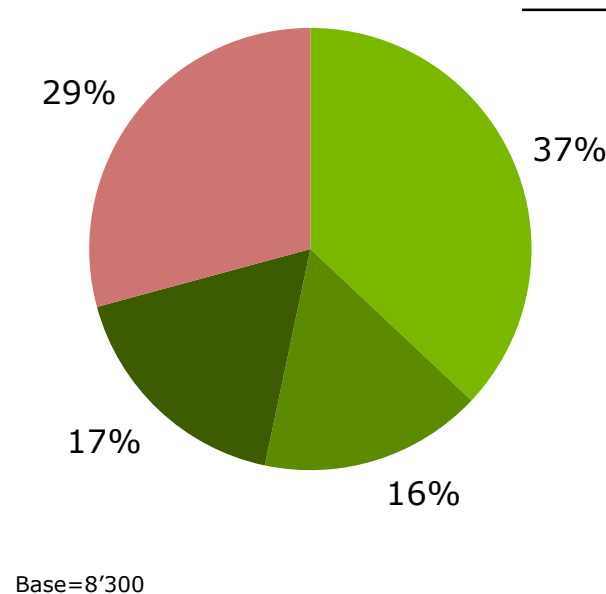
# Hearing tests and where hearing is tested



Hearing Tests: 53% (2015 51%, 2012: 49%) had a hearing test in the last 5 years, most tests are done at medical check-ups.

Have you ever taken a hearing test?

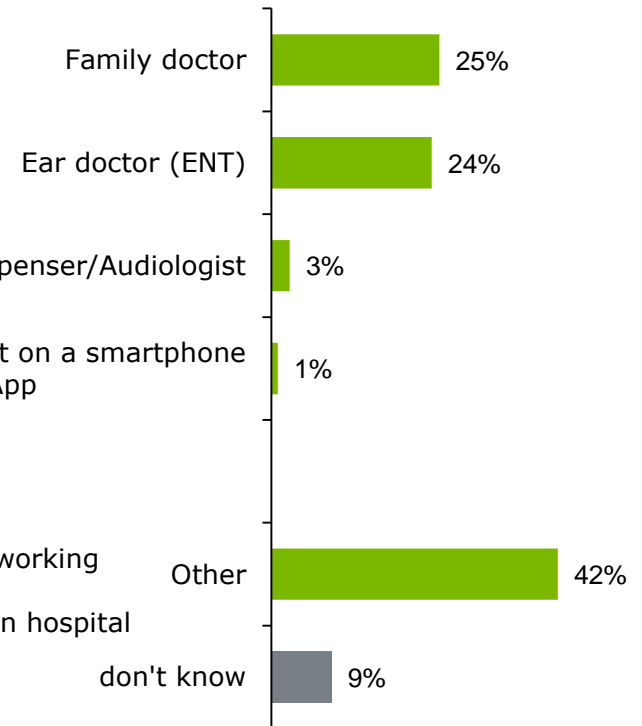
- Yes, in the last 12 months
- Yes, in the last 1-5 years
- Yes, more than 5 years ago
- No, never



**Most „other“ mentions:**

1. Annual health check of working place (in hospital)
2. voluntary health check in hospital
3. School

Where/how was your hearing tested (last 5 years)?





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

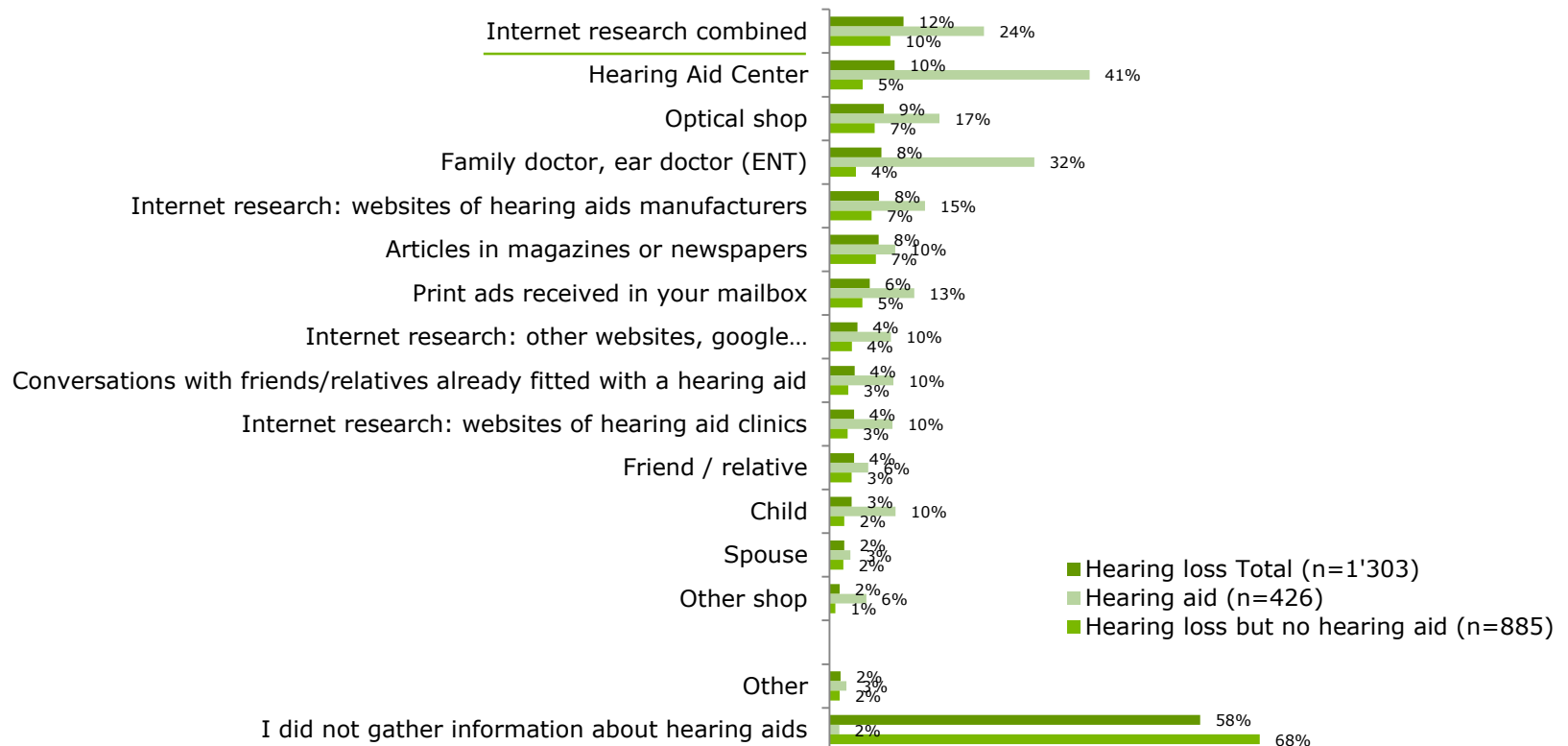


Hearing aid centers, doctors and optical shops are the most important sources of information and therefore the major gatekeepers.

Where did you gather information about hearing aids?

Please check all that apply.

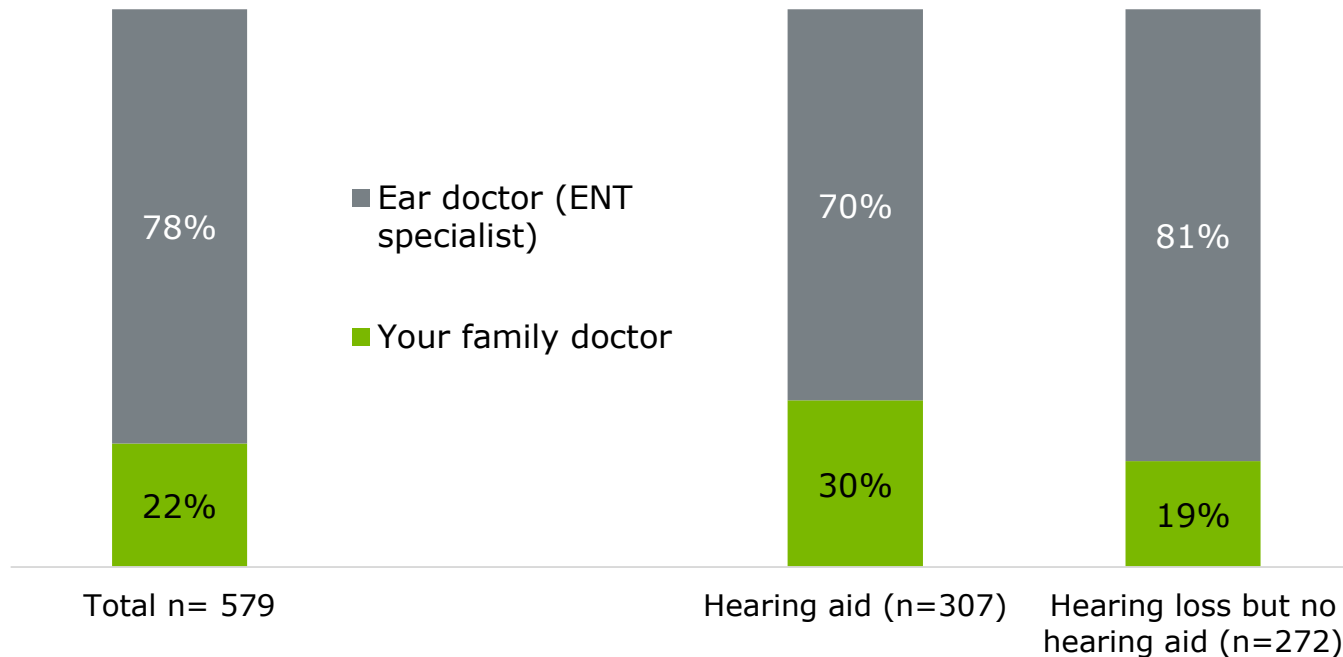
(This question included Japan-specific answers.)



# Of those who discussed the hearing loss with a doctor, 78% talked to an ENT first and 22% talked to the family doctor first.

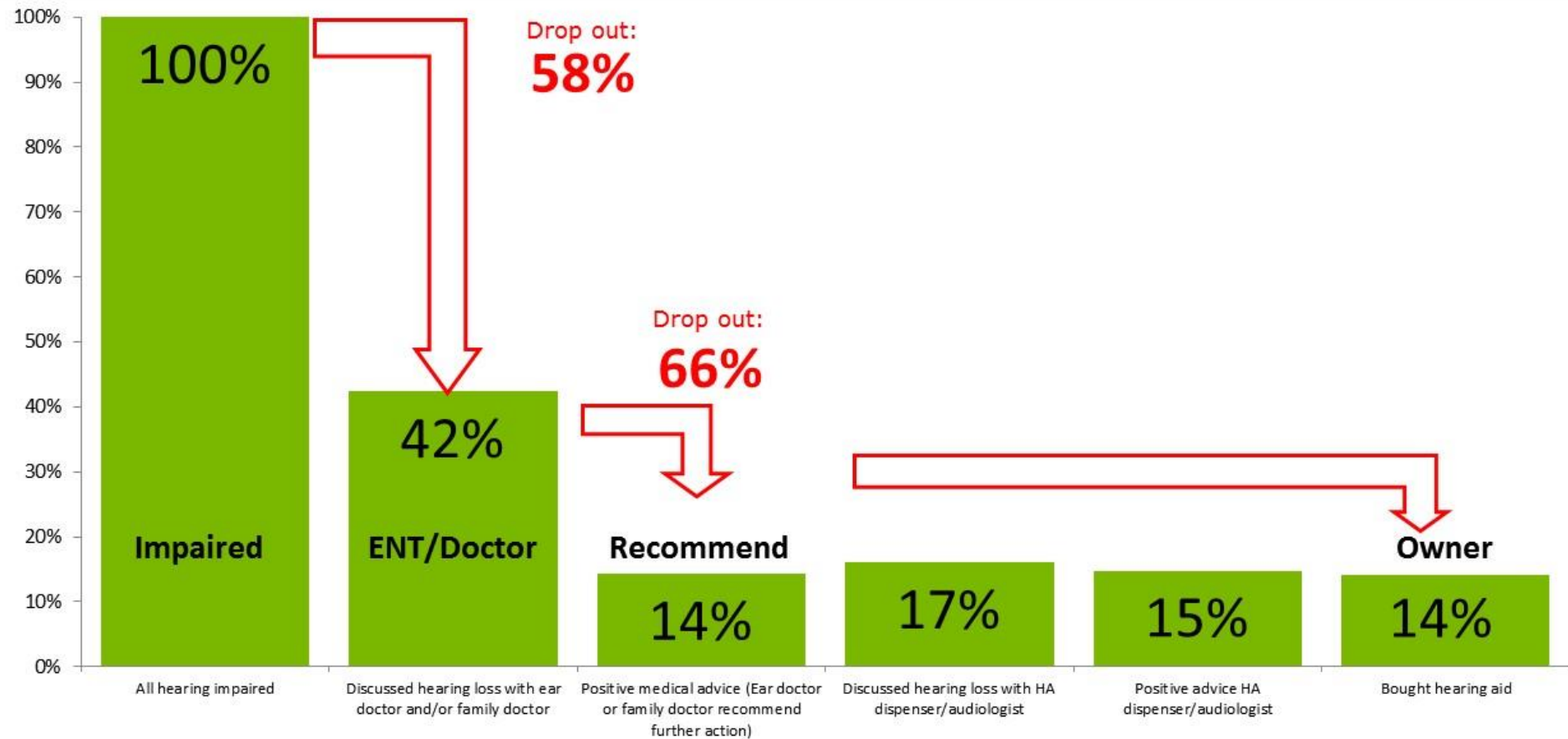
Those who discussed hearing loss with family doctor and/or ENT:

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





# The route to the hearing aid

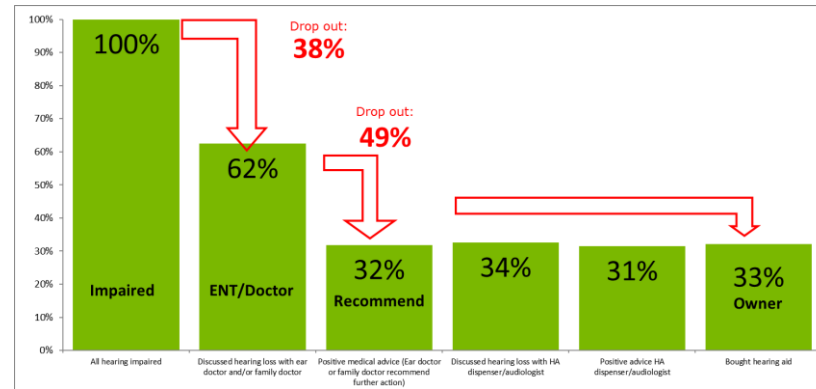


Base: n=1'306

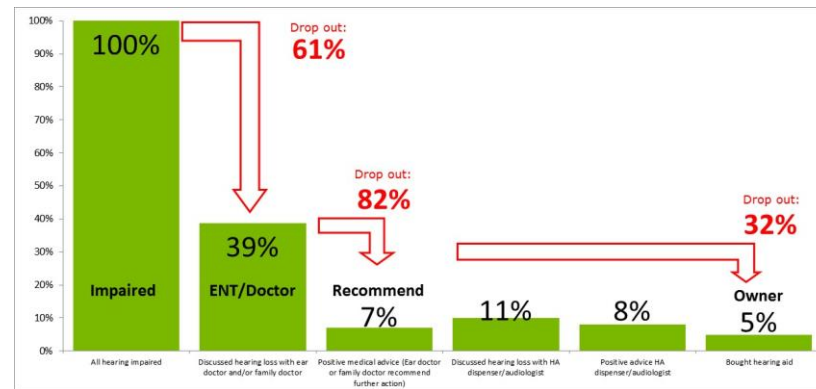
Hearing aid dispenser was asked in general without any further specification

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

Top 50% hearing loss\*



Low 50% hearing loss\*



Hearing aid dispenser was asked in general without any further specification

Base: n= 560/391

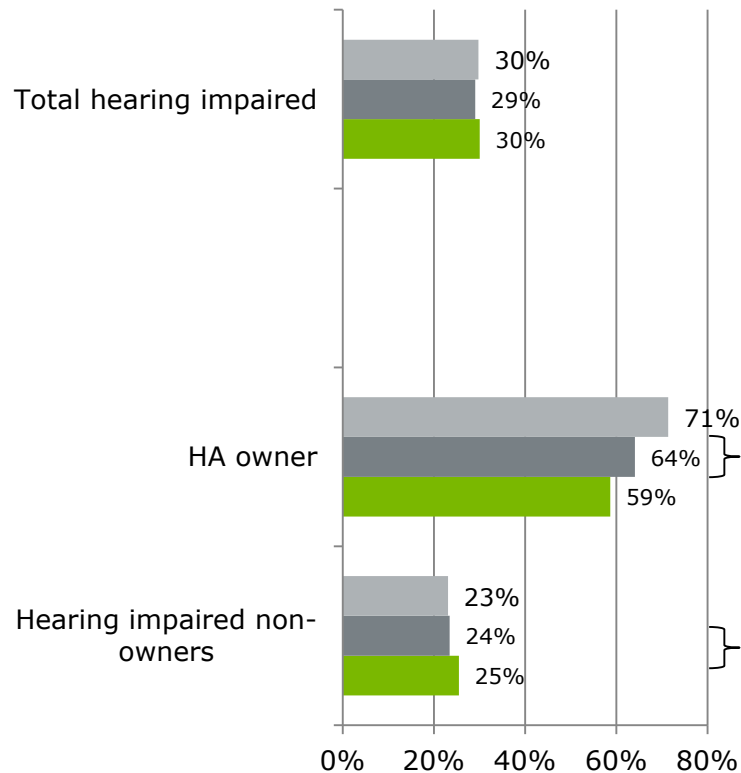
\* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- 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?

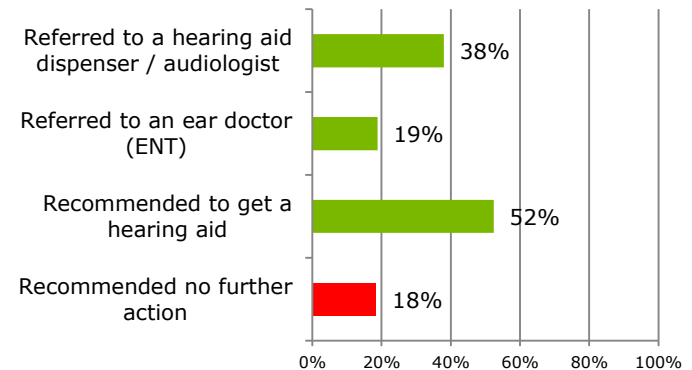
**% Discussed with GP**



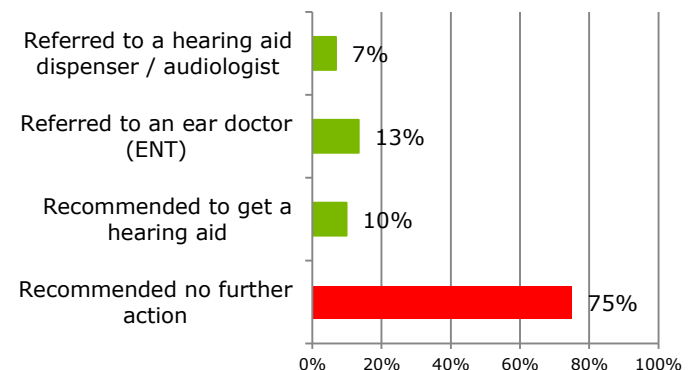
■ JapanTrak 2018 ■ JapanTrak 2015 ■ JapanTrak 2012  
 Base: 1'306 Base: 1'216 Base: 1'348

**What did he/she recommend ?**

## HA owner (Base: 253)



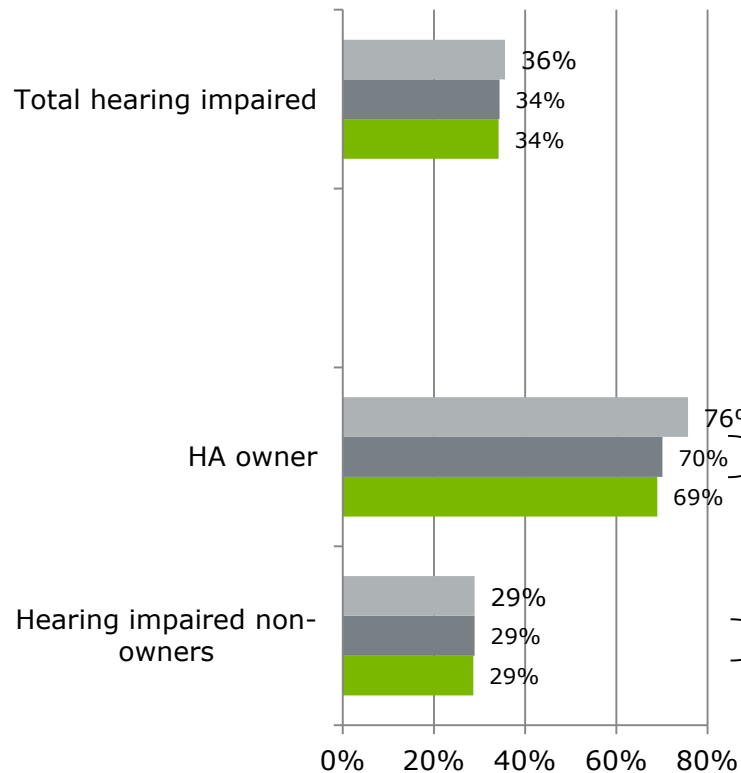
## Impaired non-owner (Base: 186)



# The route to the hearing aid: ENT

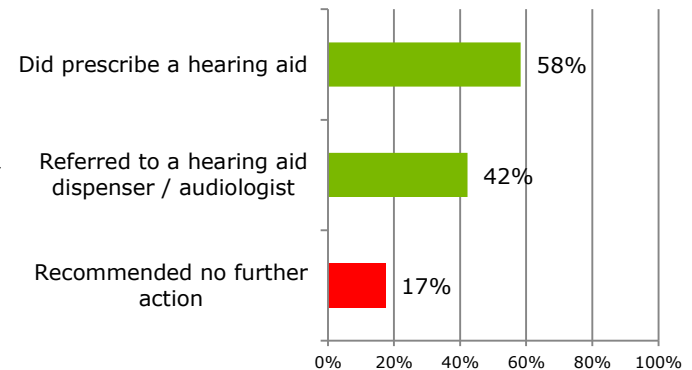
Have you discussed your hearing problem with an ear doctor (ENT)?

**% Discussed with ENT**

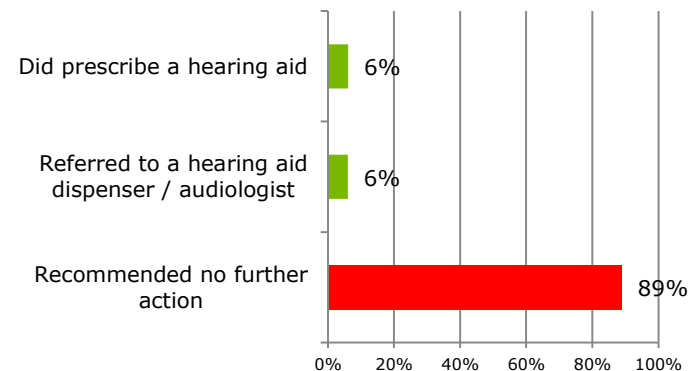


**What did he/she recommend ?**

**HA owner (Base: 259)**



**Impaired non-owner (Base: 299)**



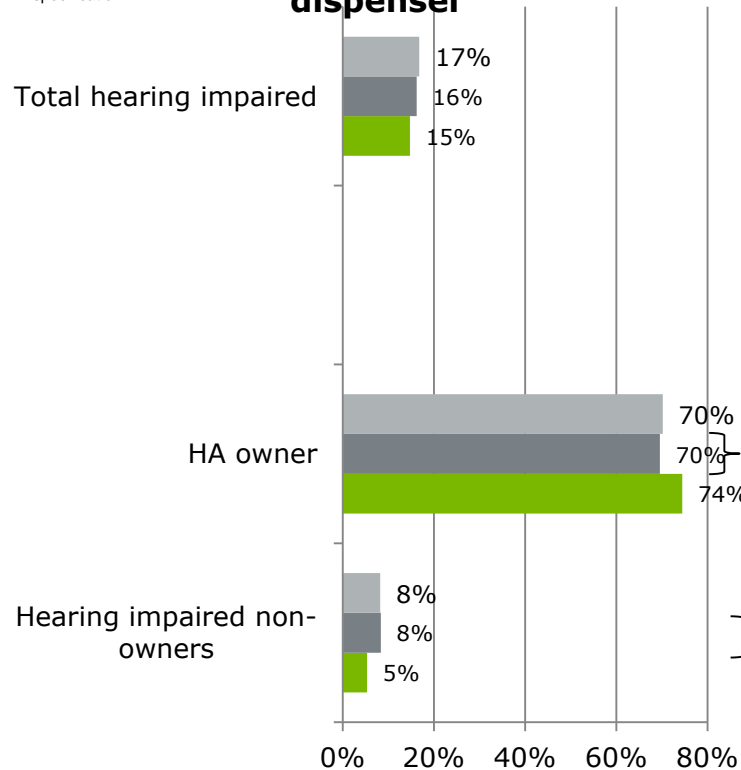
■ JapanTrak 2018 ■ JapanTrak 2015 ■ JapanTrak 2012  
Base: 1'306 Base: 1'230 Base: 1'348

# The route to the hearing aid: HA dispenser

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

Hearing aid dispenser was asked in general without any further specification

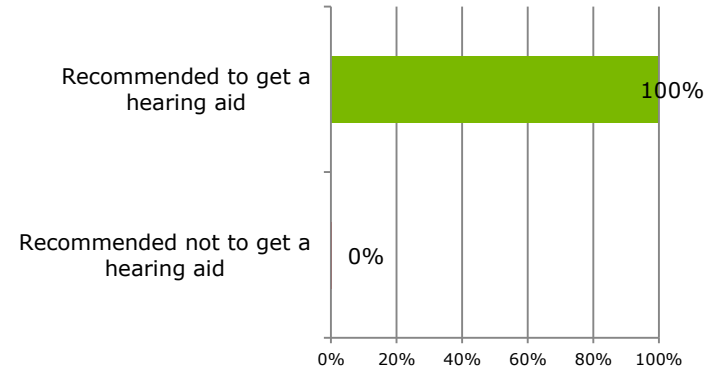
## % Discussed with hearing aid dispenser



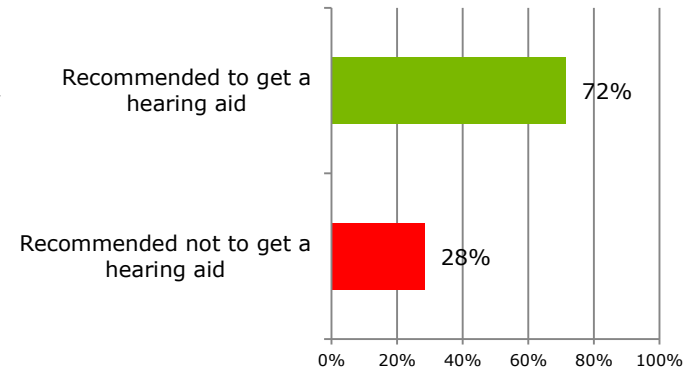
■ JapanTrak 2018 ■ JapanTrak 2015 ■ JapanTrak 2012  
Base: 1'306 Base: 1'266 Base: 1'348

## What did he/she recommend ?

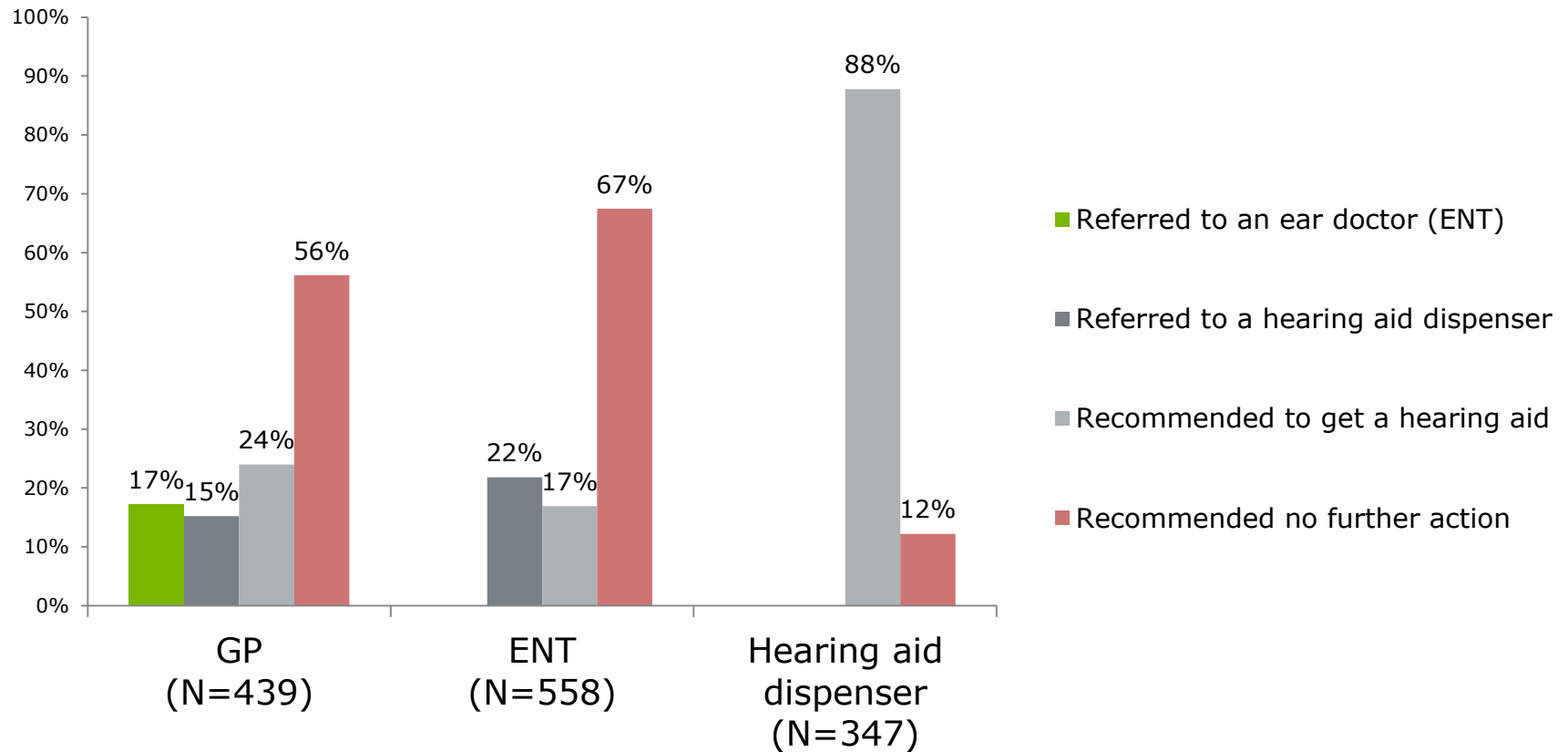
### HA owner (Base: 297)



### Impaired non-owner (Base: 50)



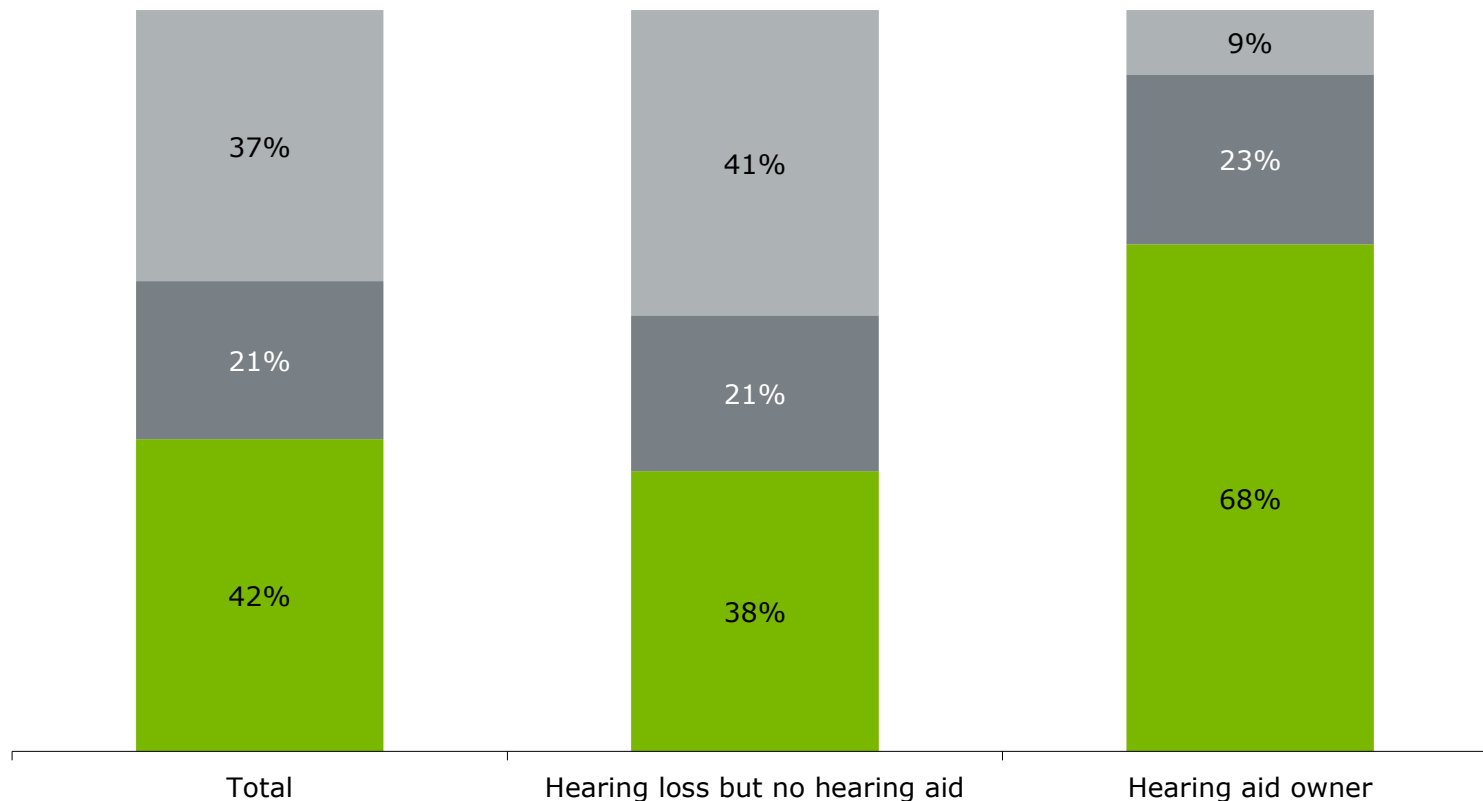
# Recommendations by profession



# Hearing aid shops are not very well known

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

■ Yes ■ No ■ Don't know

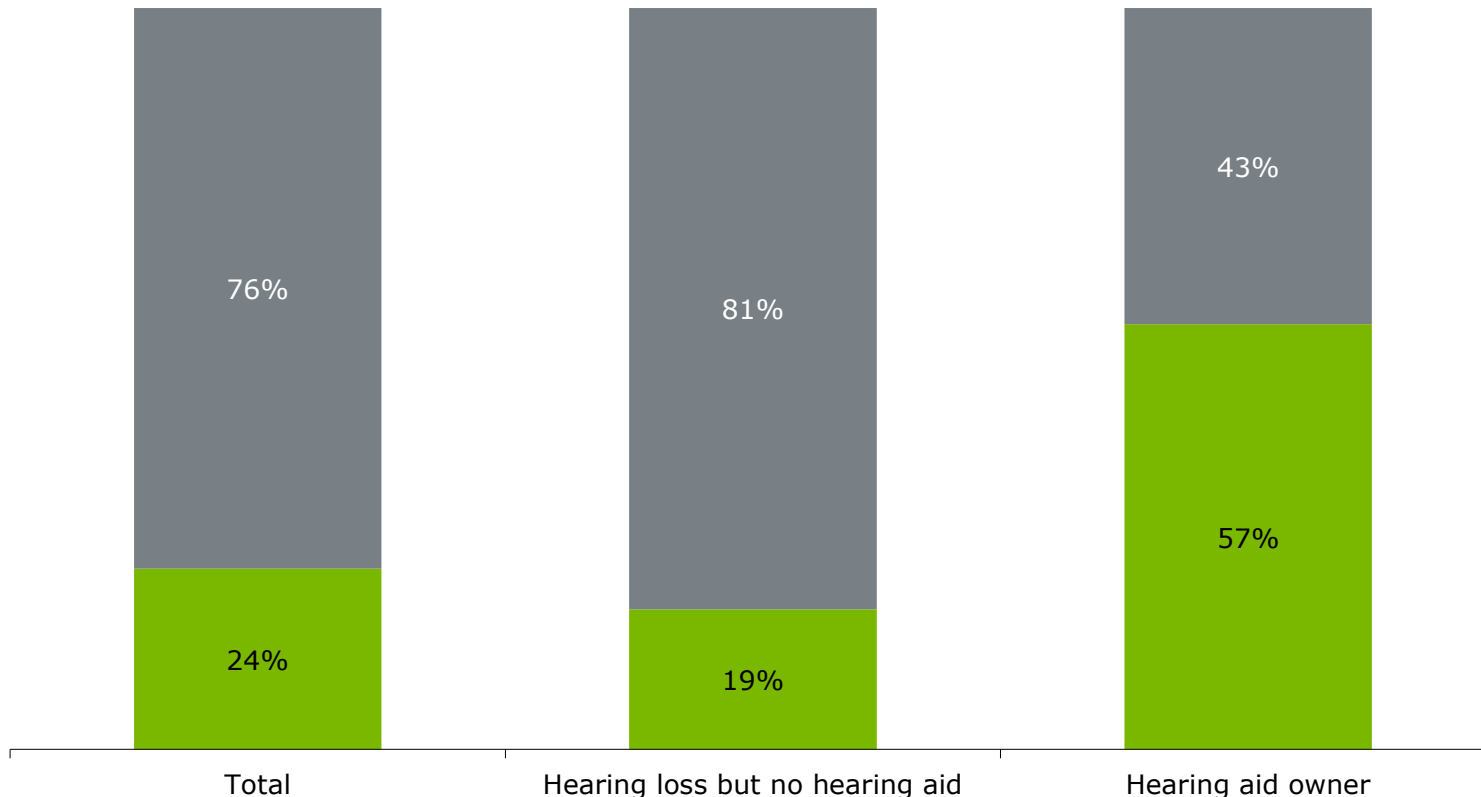


Unweighted Sample Size = 1306

# Only 24% of the hearing impaired know the expression “Nintei - Hocyouki - Senmon - Ten” (“certified hearing aid shop”)

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

■ Yes ■ No



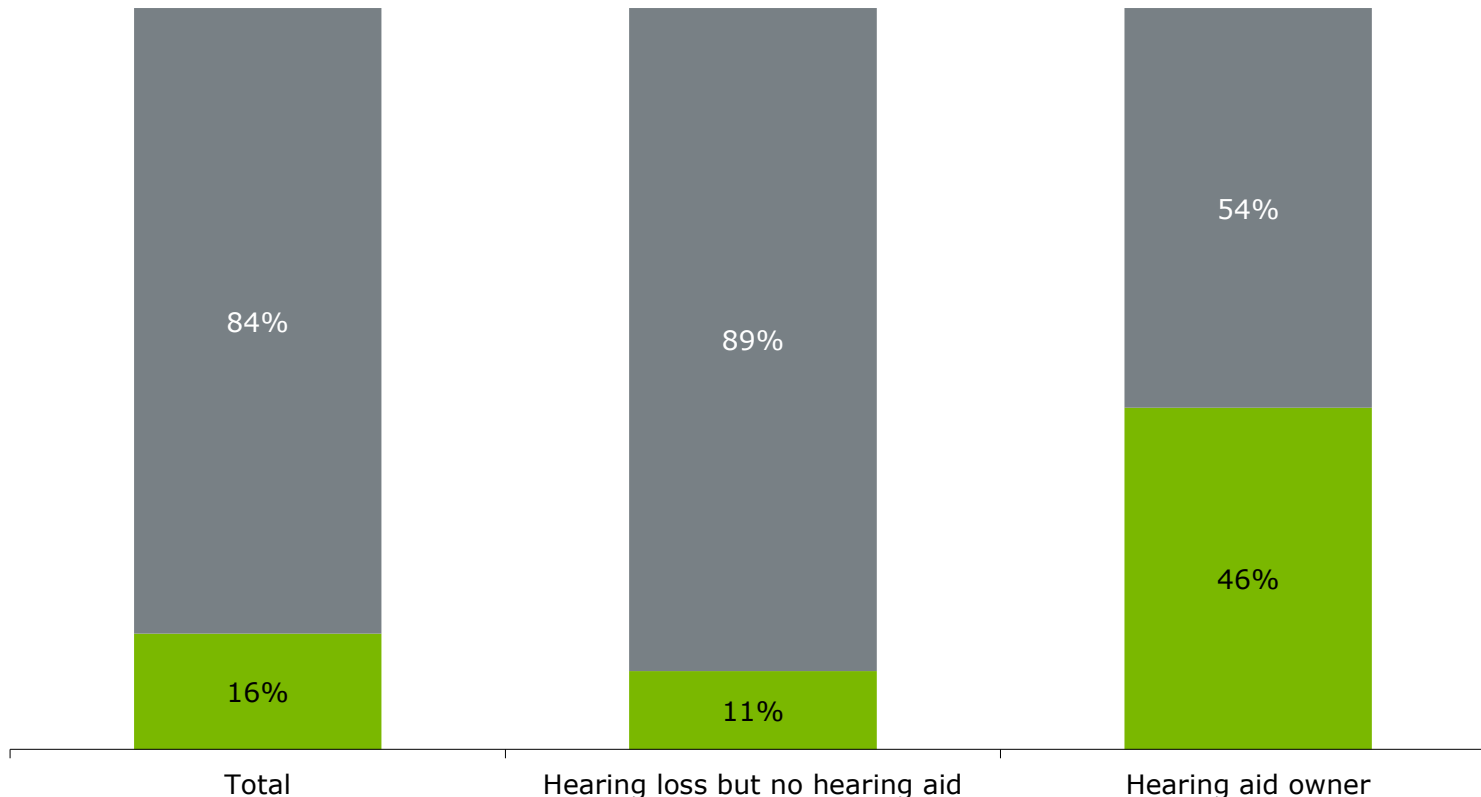
Unweighted Sample Size = 1306



# Only 16% of the hearing impaired know the expression “Nintei - Hocyouki - Ginou - Sha” (“certified hearing aid worker”)

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

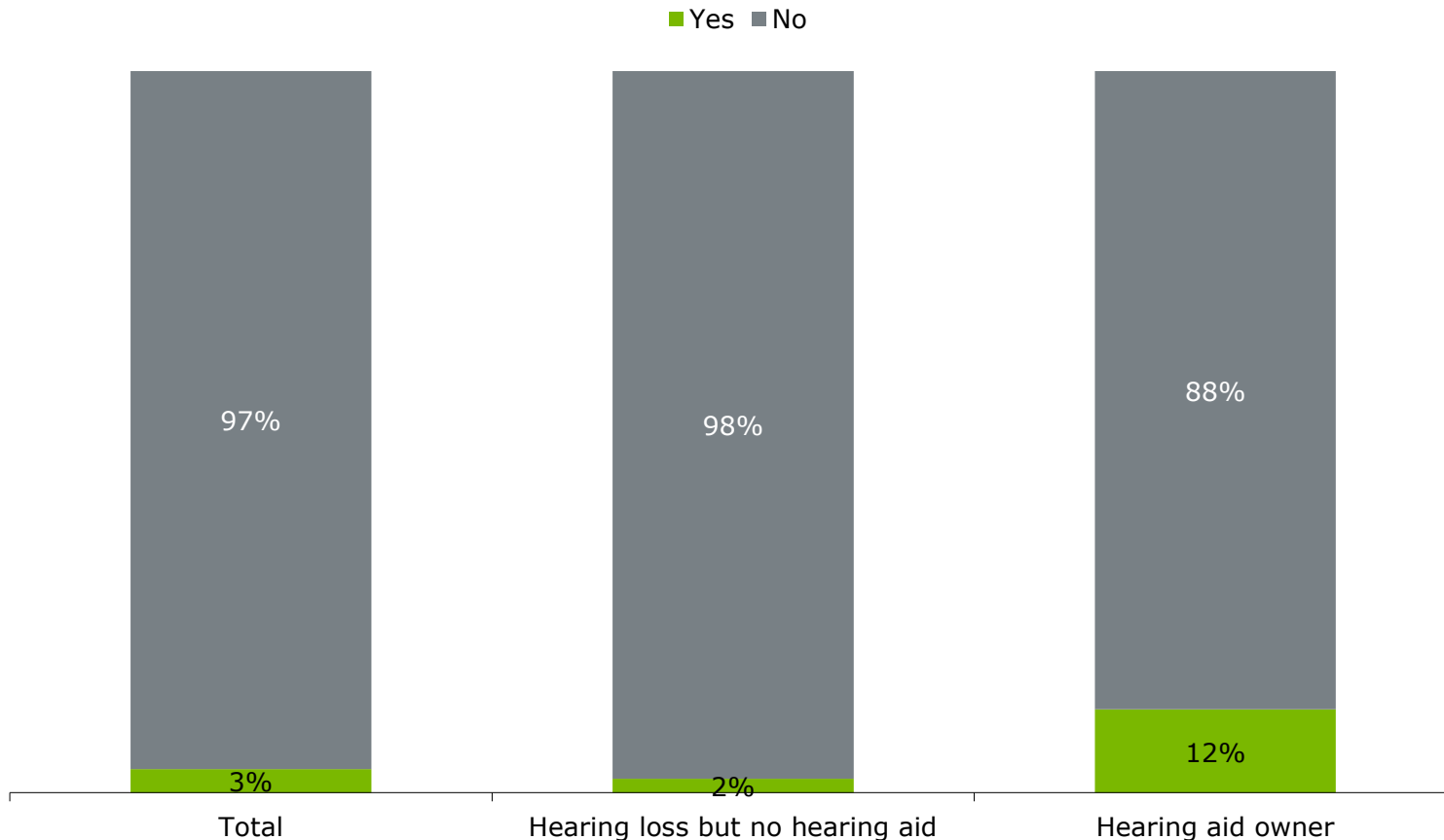
■ Yes ■ No



Unweighted Sample Size = 1306

# Only 3% of the hearing impaired know the expression “Techno-aid-kyoukai” (“association technical aids”)

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



Unweighted Sample Size = 1306



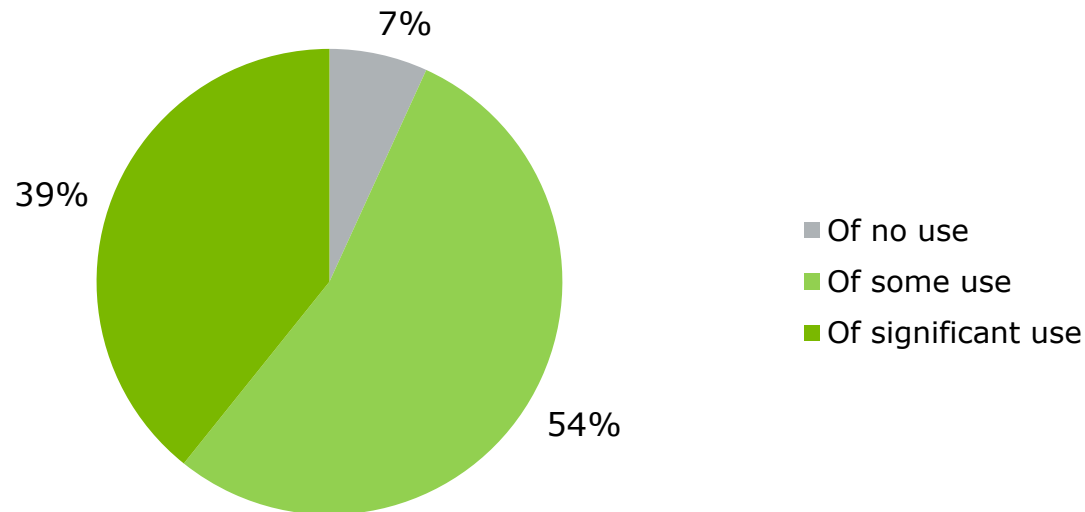
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Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality



**Work competitiveness:** 93% of the working hearing aid owners state their hearing aid(s) are useful on their job.

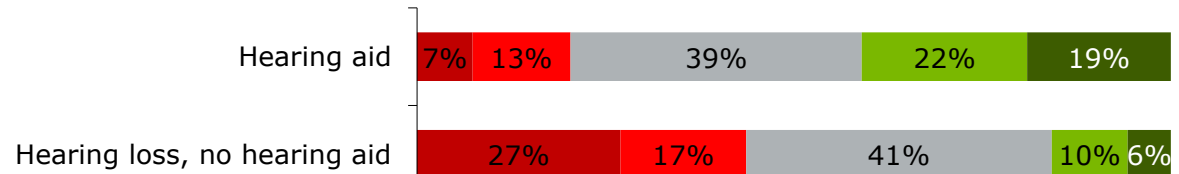
### How useful are your hearing aids on your job?



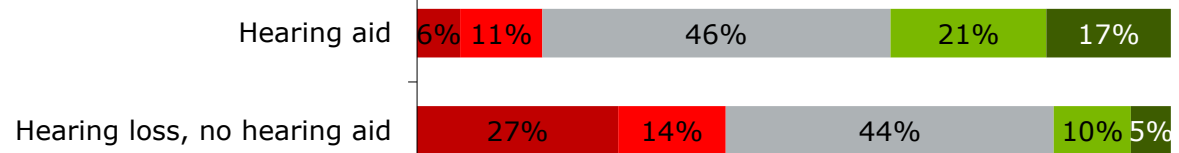
**Work competitiveness:** People with hearing aids recognize that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to get more salary.

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

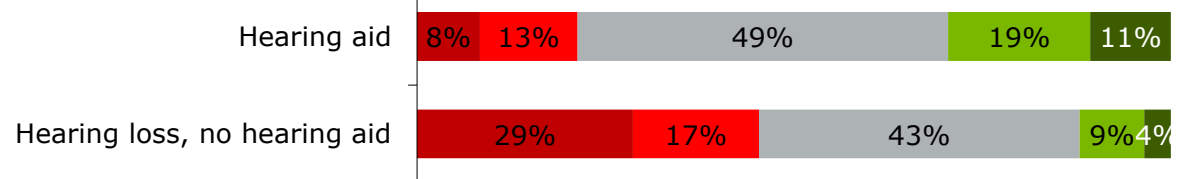
**I think that people with an untreated hearing loss tend to be less promoted in their job**



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



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



Base: Hearing loss, no hearing aid =741/ hearing aid n=382

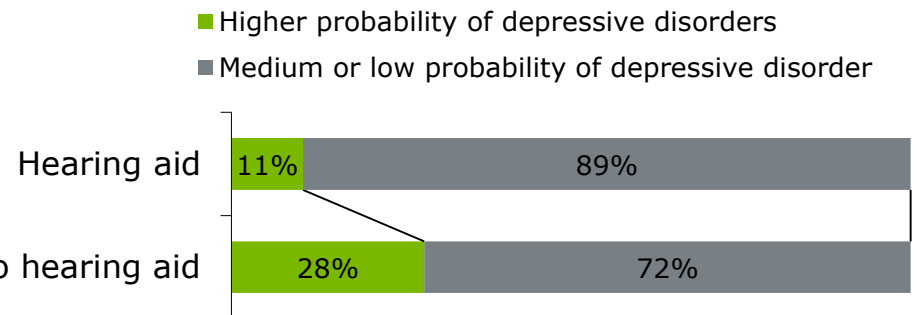
**General health problems:** Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (**Top50% hearing loss group\***).

## Depression symptoms: PHQ-2 Screening:

In the last 2 weeks:

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

Top 50% hearing loss, no hearing aid



Base: hearing aid n=354 / no hearing aid =141

\*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 (Top 50% hearing loss\*), hearing aid owners feel less exhausted in the evenings

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

In the evenings I often feel physically exhausted

Hearing aid



Top 50% hearing loss, no hearing aid

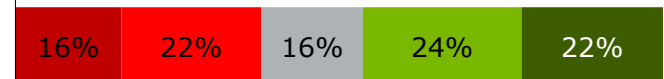


In the evenings I often feel mentally exhausted

Hearing aid



Top 50% hearing loss, no hearing aid



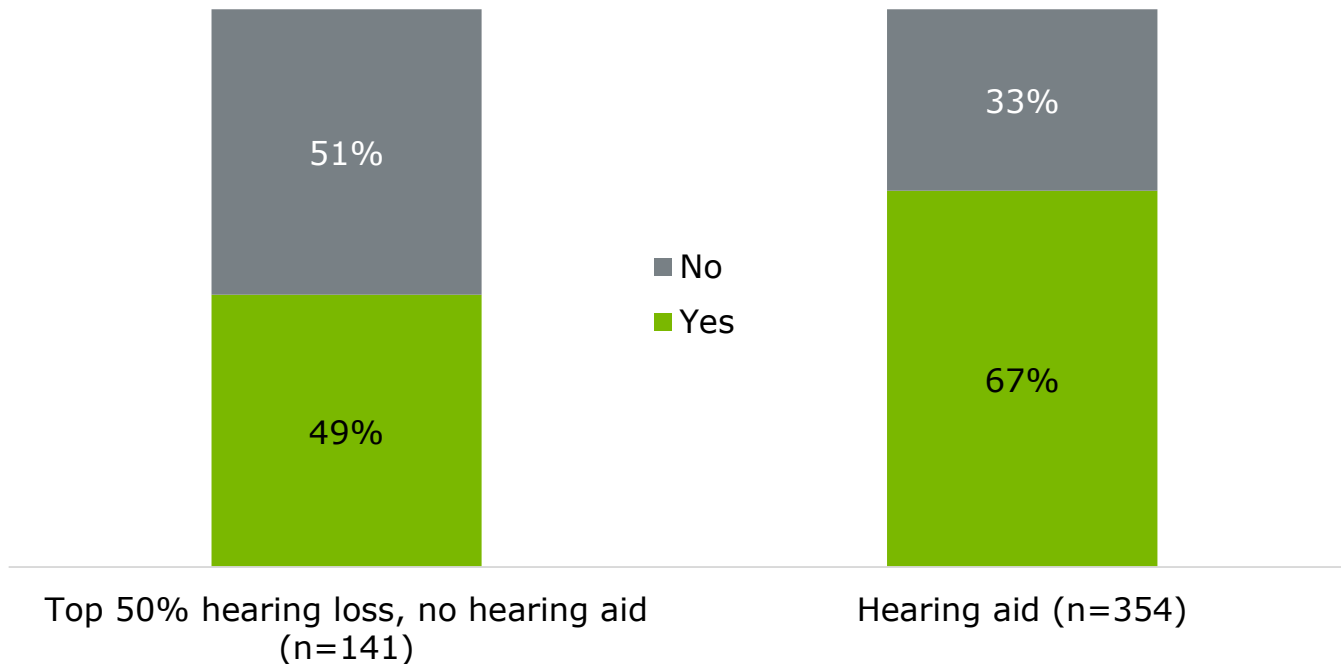
Base: hearing aid n=351 / Top 50% no hearing aid =137

\*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

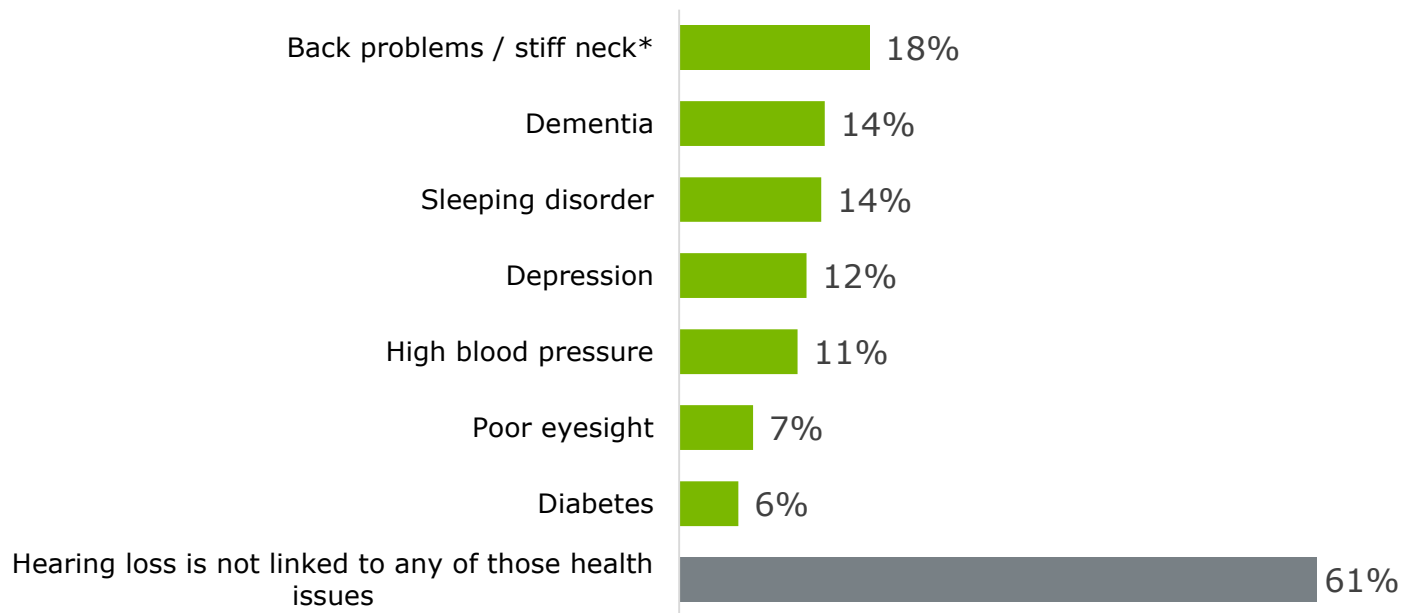
Are you generally satisfied with the quality of your sleep?





# Between 12% and 18% of hearing impaired think that hearing loss could be linked to depression, sleeping disorders, dementia or back problems/stiff neck

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



Hearing impaired, N=1'303  
 \*JapanTrak specific wording



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## 3. Analysis of hearing aid owners



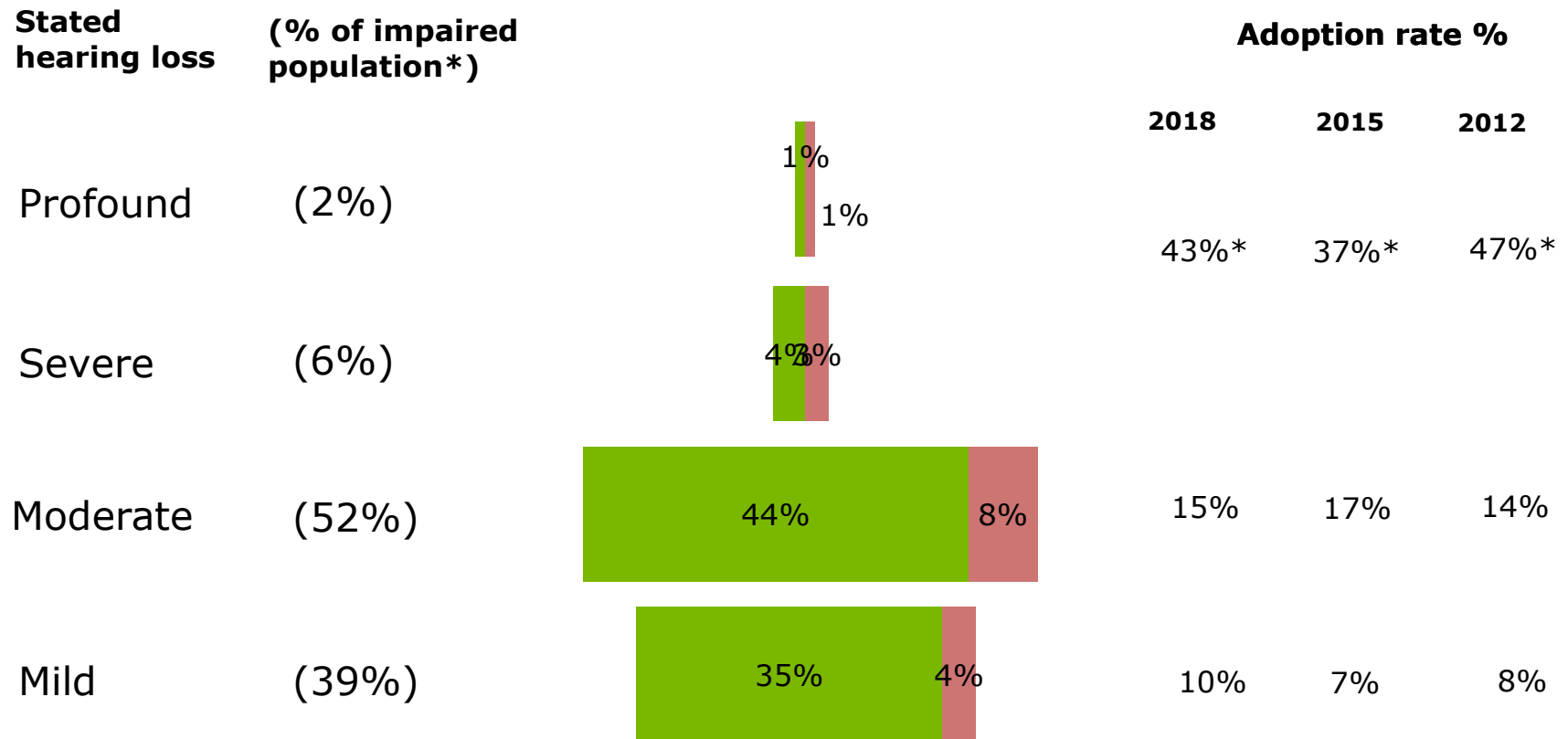


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Hearing aid ownership, awareness of hearing loss  
before getting hearing aids, lifetime of hearing aids  
and usage



# Low adoption rates within mild and moderate hearing loss



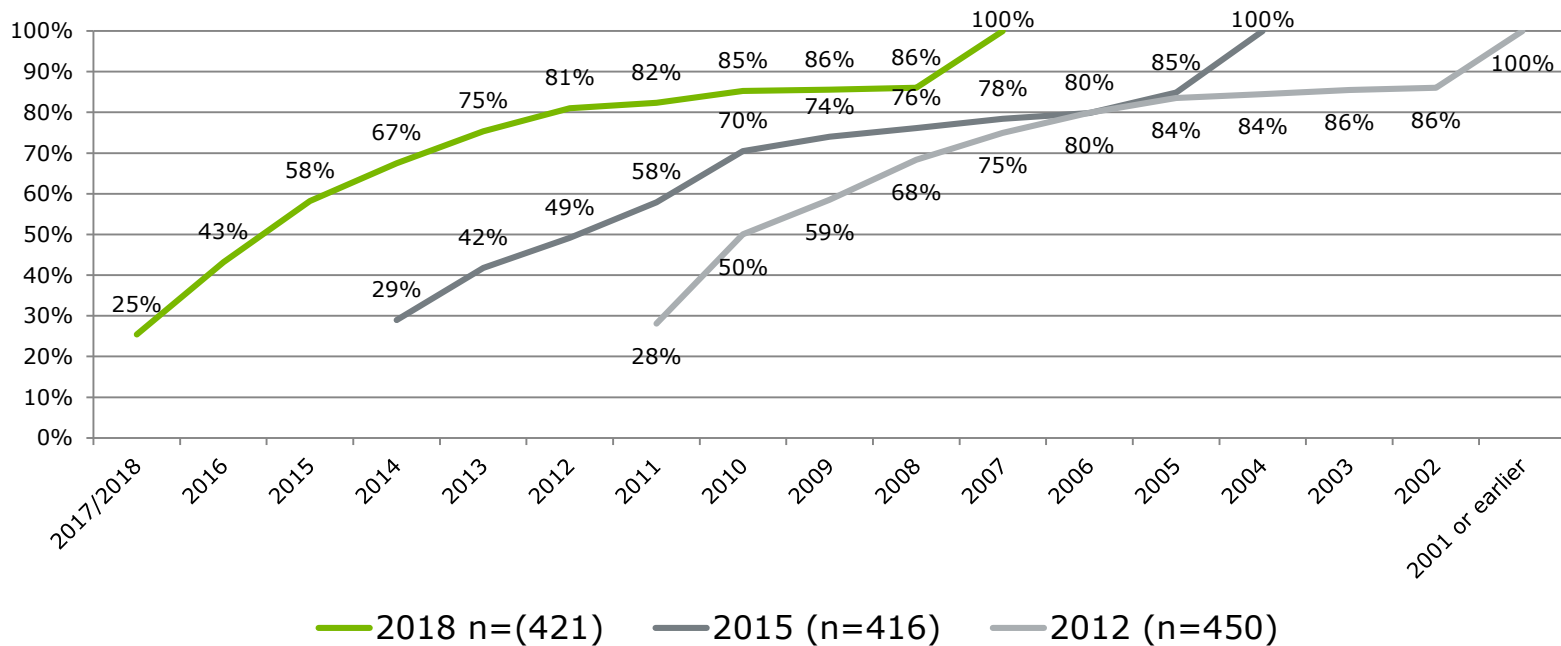
Base: n= 1'161

Sums can differ from 100% due to rounding

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

# 43% of the currently owned HAs were bought in the last two years

## Year of purchase



### Age of currently owned HAs (Mean):

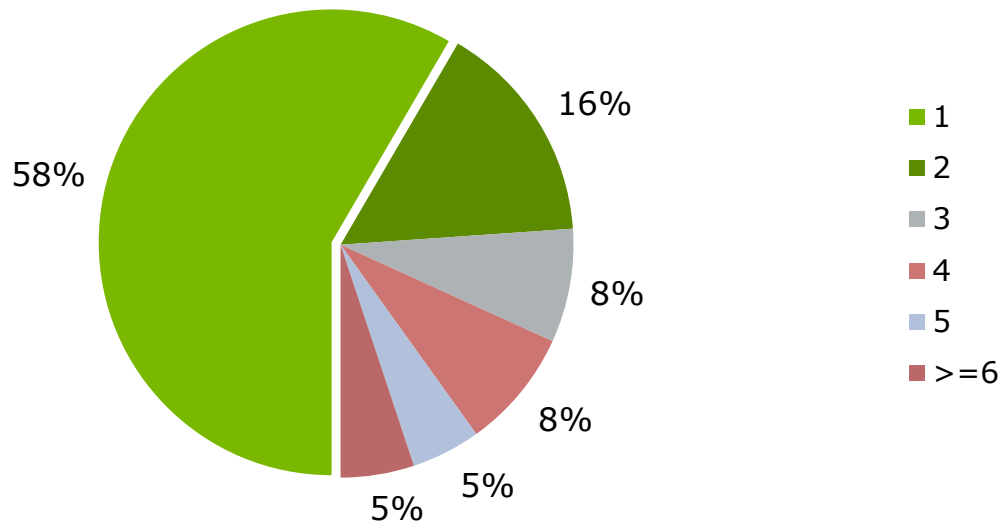
2018: 3.5 years

2015: 4.1 years

2012: 3.5 years

58% are first time users, 16% own hearing aids for the second time

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



For this analysis «First time users» were set to «1» – they did not see the question

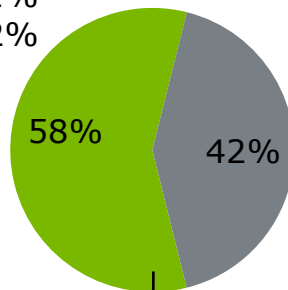
Base: N=421

On average 4-6 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 5 years before they are being replaced.

### Current HAs = first HAs?

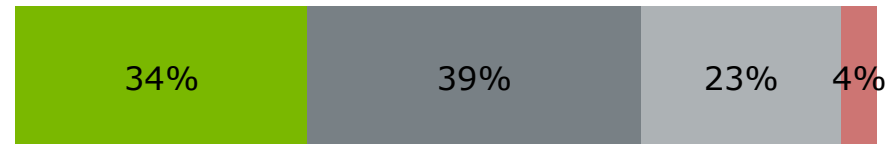
2012: 51%  
2015: 52%

■ Yes  
■ No



HA-owner, n=421

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



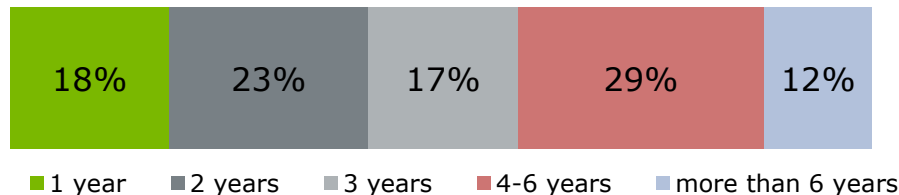
■ 1-3 years ■ 4-6 years ■ 7-10 years ■ 11 years or longer

Base: n=167

### Age of HA before it has been replaced:

2018: 5 years (median)  
2015: 5 years (median)  
2012: 4 years (median)

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

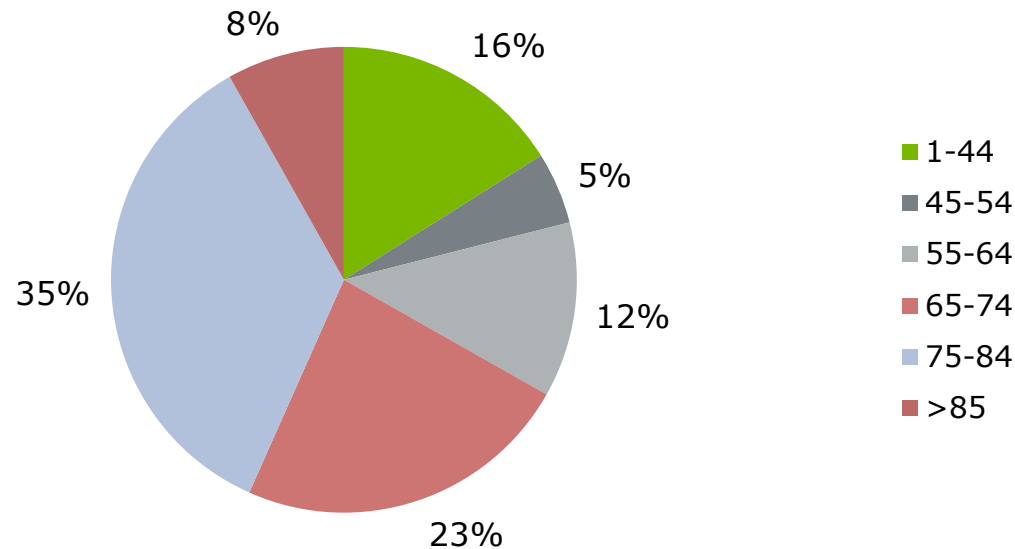


■ 1 year ■ 2 years ■ 3 years ■ 4-6 years ■ more than 6 years

Base: n=234

People are around 70 years old when they feel the need for a hearing aid

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



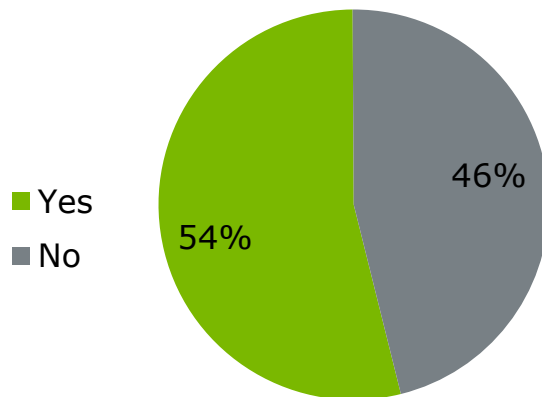
Median: 70 years

Base: N=421



# 54% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

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



HA-owner, n=421

## 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

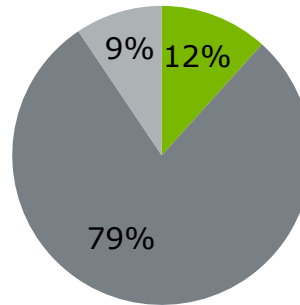


Base: n=226

12% received some kind of reimbursement from the government. Only 7% of non-owners know the system of supplying hearing aid(s) by the government.

## 2018

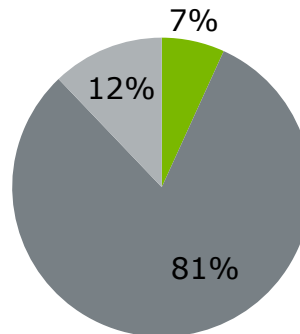
**Owners:** Was any part or all of your hearing aid(s) paid by the government?



HA-owner, n=421

- Yes (2015: 15%/12: 12%)
- No (2015: 76%/12: 81%)
- don't know (2015: 9%/12: 7%)

**Non-owners:** Do you know the system of supplying hearing aid(s) by government ?



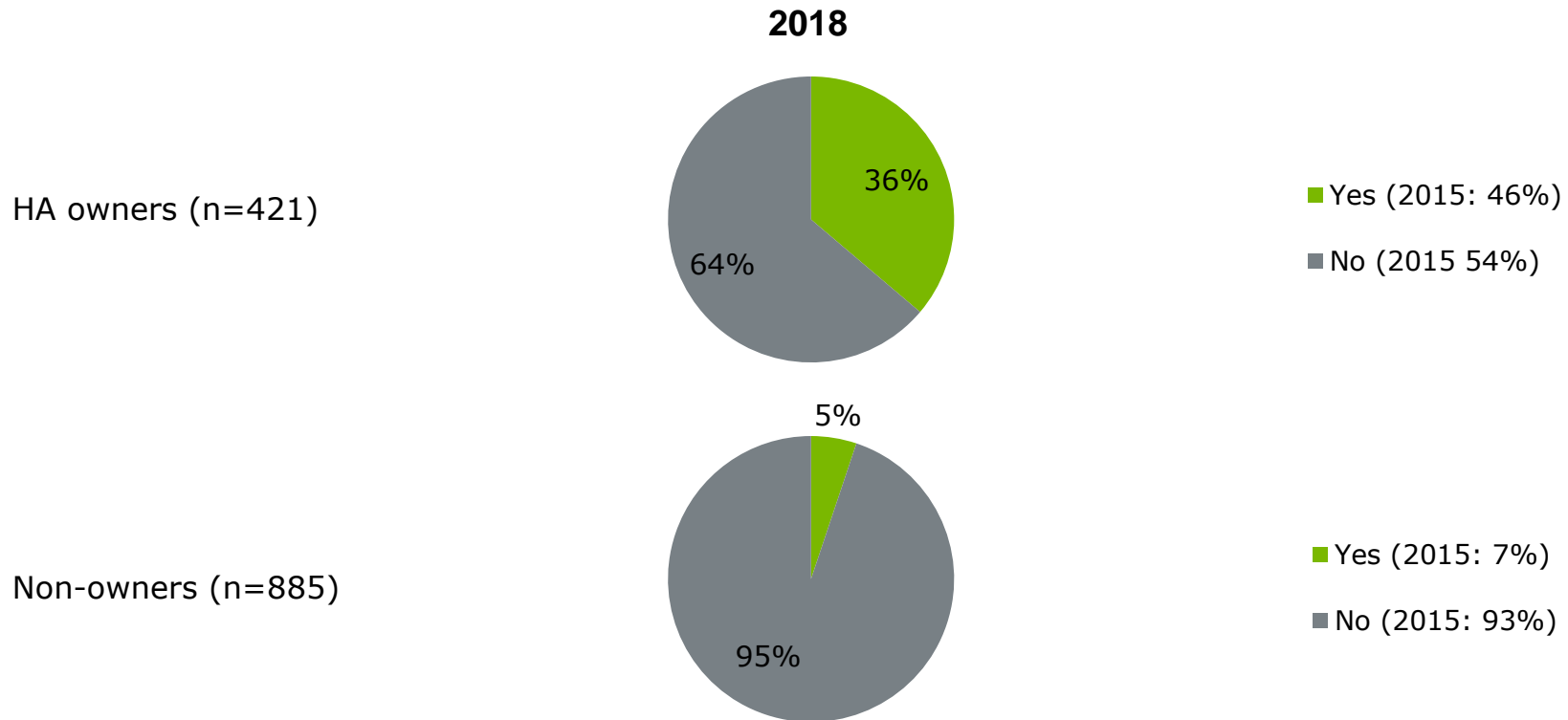
HA-non-owners, n=885

- Yes (2015: 9%/12: 6%)
- No (2015: 80%/12: 84%)
- don't know (2015: 11%/12: 10%)

# Generally people are not aware that hearing aids are untaxed articles in the VAT system

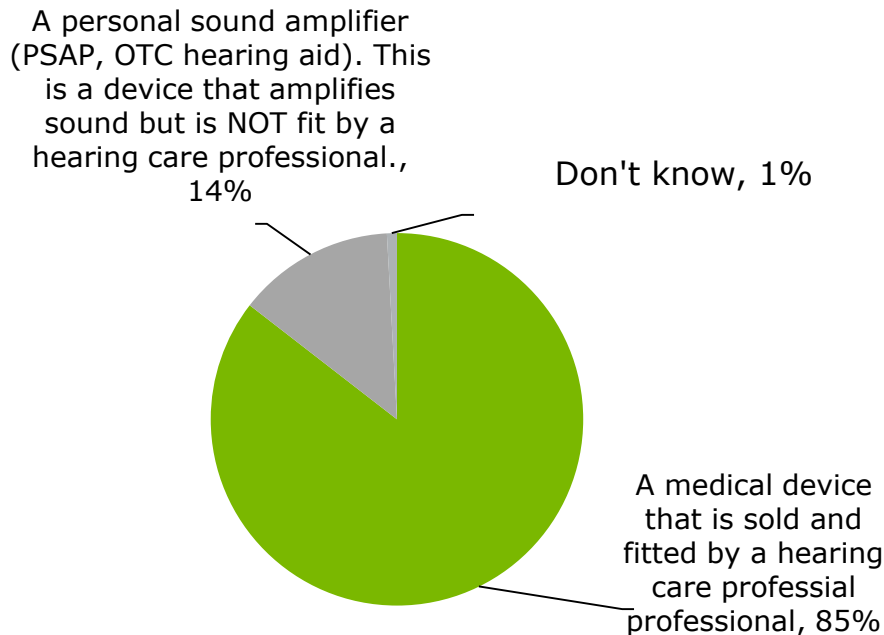
Do you know that hearing aids are untaxed articles in the Japanese Value added Tax system?

Total hearing impaired: 12% yes (n=1306)

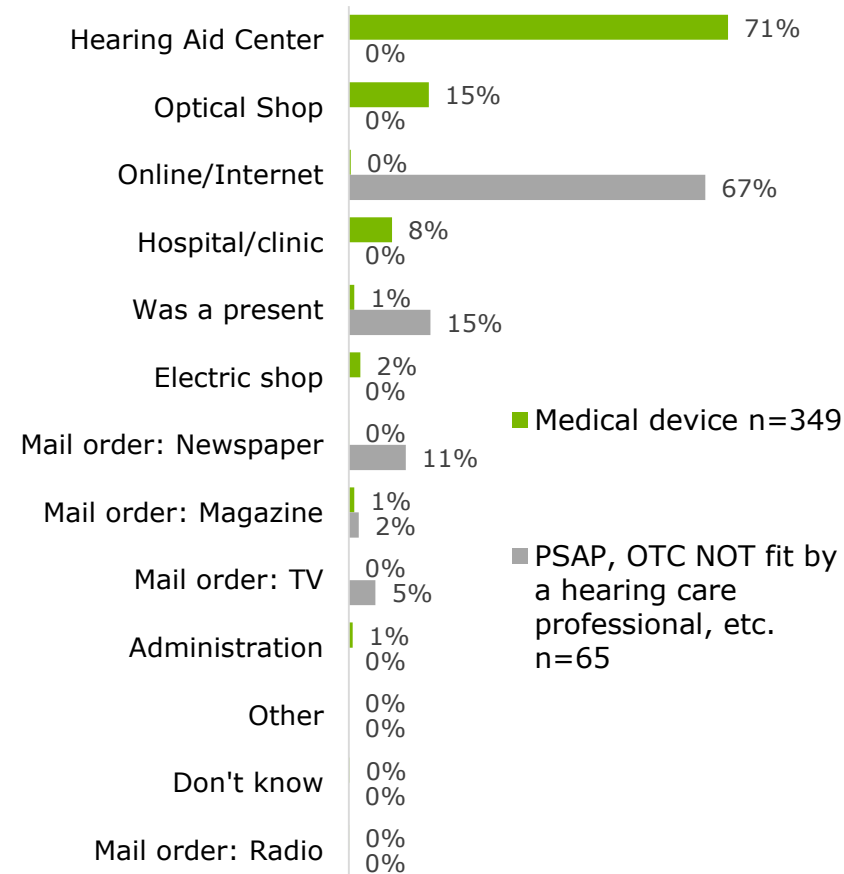


# Most medical devices were sold at a hearing aid center, PSAP's/OTC are sold online

Would you classify your hearing aid as a... (n=421)



Where was your most current hearing aid purchased?



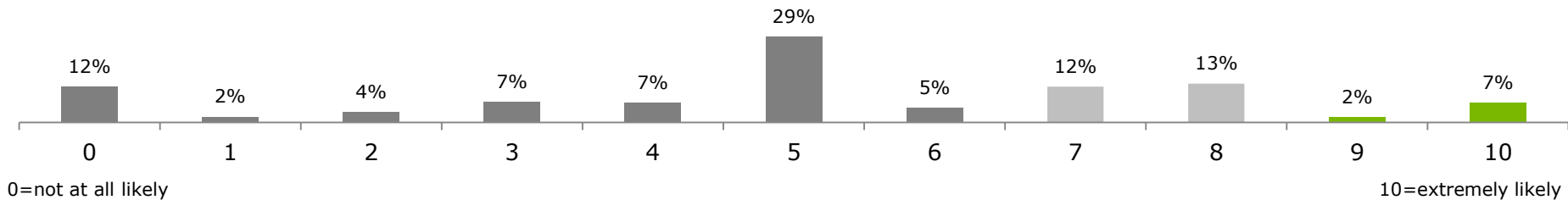
# Recommendation intention of the place where the hearing aid(s) have been obtained low.

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

**DETRACTORS**  
66%

**PASSIVES**  
26%

**PROMOTERS**  
8%

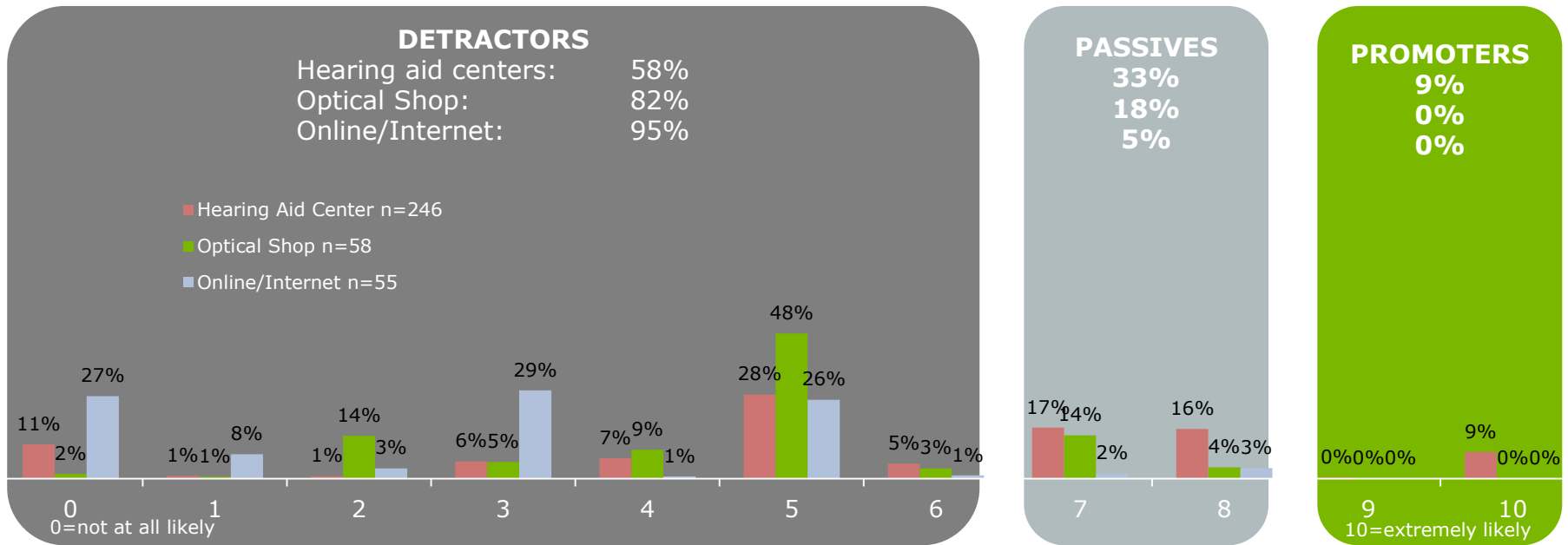


**NPS = PROMOTERS – DETRACTORS = -58**

HA-owner, n=421

# Recommendation intention of the place where the hearing aid(s) have been obtained low.

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

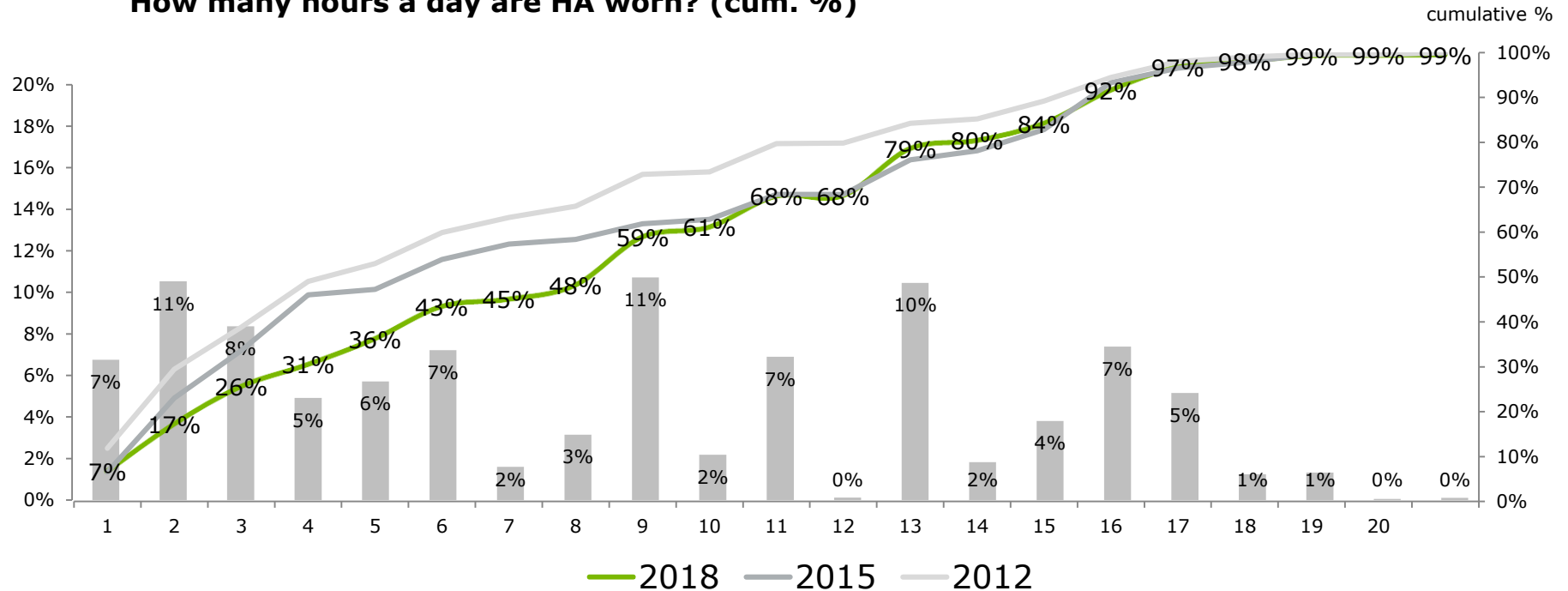


**NPS = PROMOTERS – DETRACTORS**

Hearing aid centers: -49  
Optical Shop: -82  
Online/Internet: -95

# On average, HAs are worn 7.6 hours a day – trend increasing

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

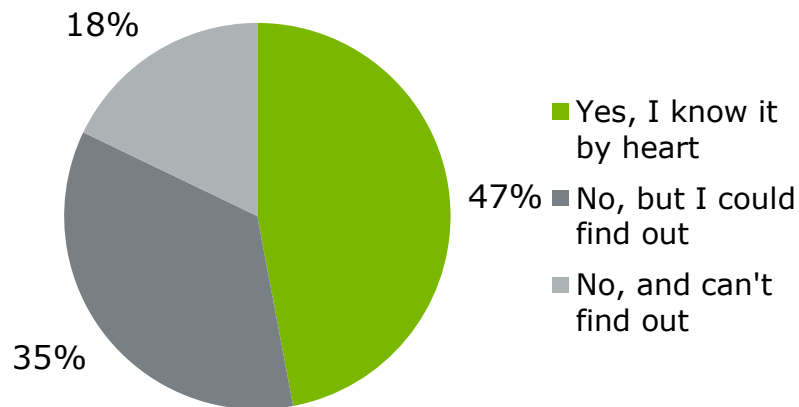


HA-owner:  
2018: n=421  
2015: n=416  
2012: n=450

**HA worn:**  
2018 Mean: 7.6 hours/day  
2015 Mean: 6.8 hours/day  
2012 Mean: 5.7 hours/day

# 47% of today's hearing aid owners are aware of their hearing aid brand

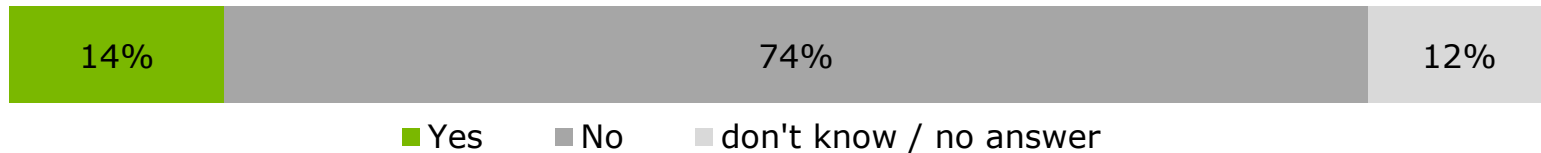
**Are you aware of the brand of your hearing aid(s)?**





16% of the HA owners use an accessory for their hearing aids.  
63% of those who use an accessory, are satisfied with it.

Have you been informed by your hearing care professional about hearing aid accessories, such as TV-Streamer/ Apps / Remote Control / etc. ? (HA owners, n=421)

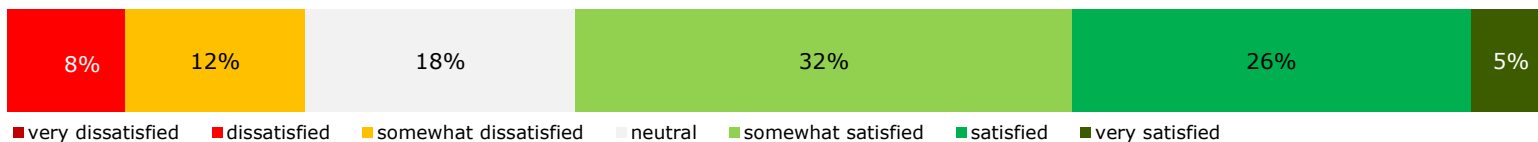


Do you personally use accessories for your hearing aids (TV-Streamer/ Apps / Remote Control / etc.) ? (HA owners, n= 421)



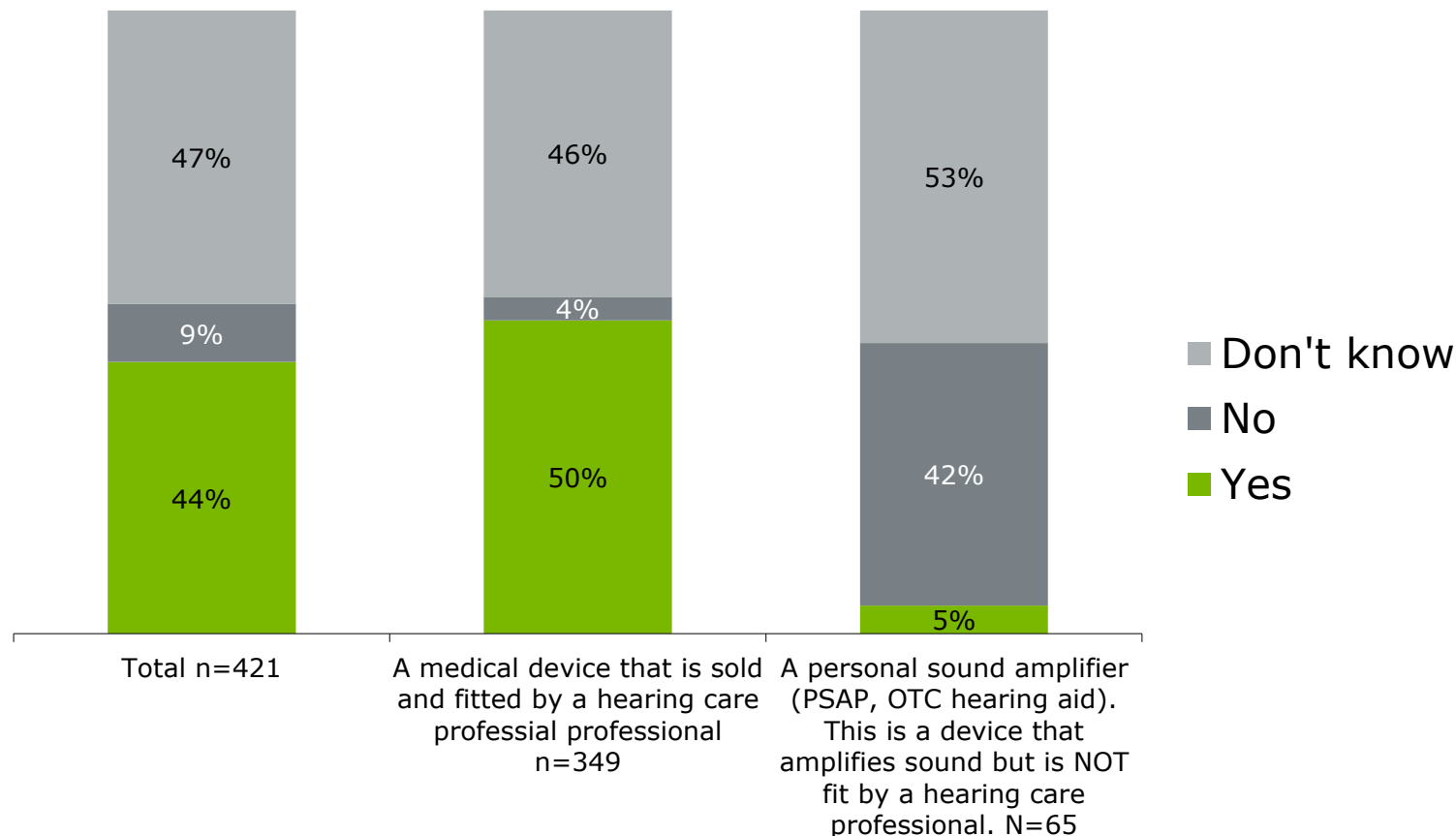
*IF ACCESSORIES USED (n=49):*

Overall, how satisfied with the performance of your accessorie(s)?



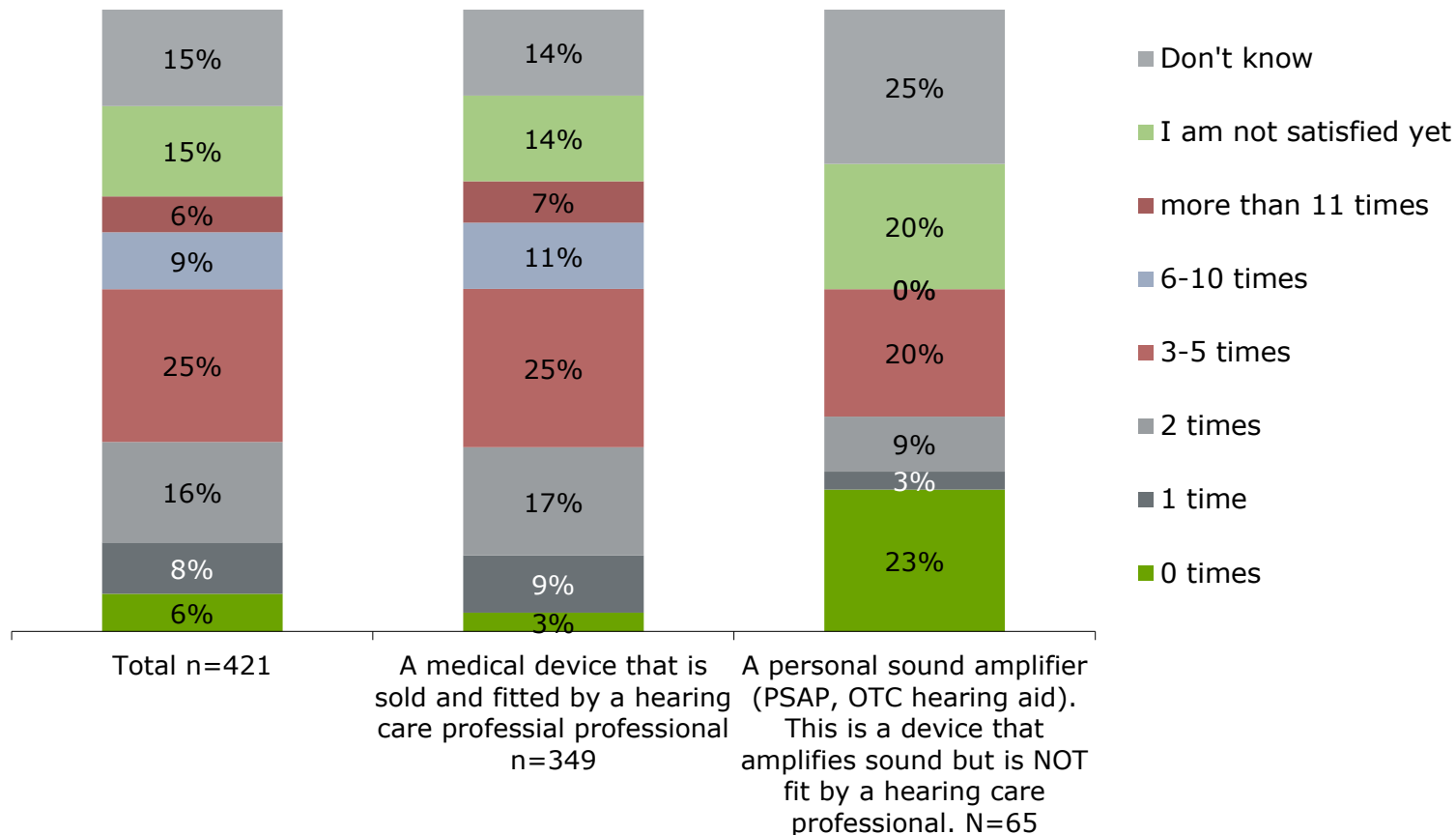
# 44% are aware that a certified hearing aid technician fitted the hearing aids

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



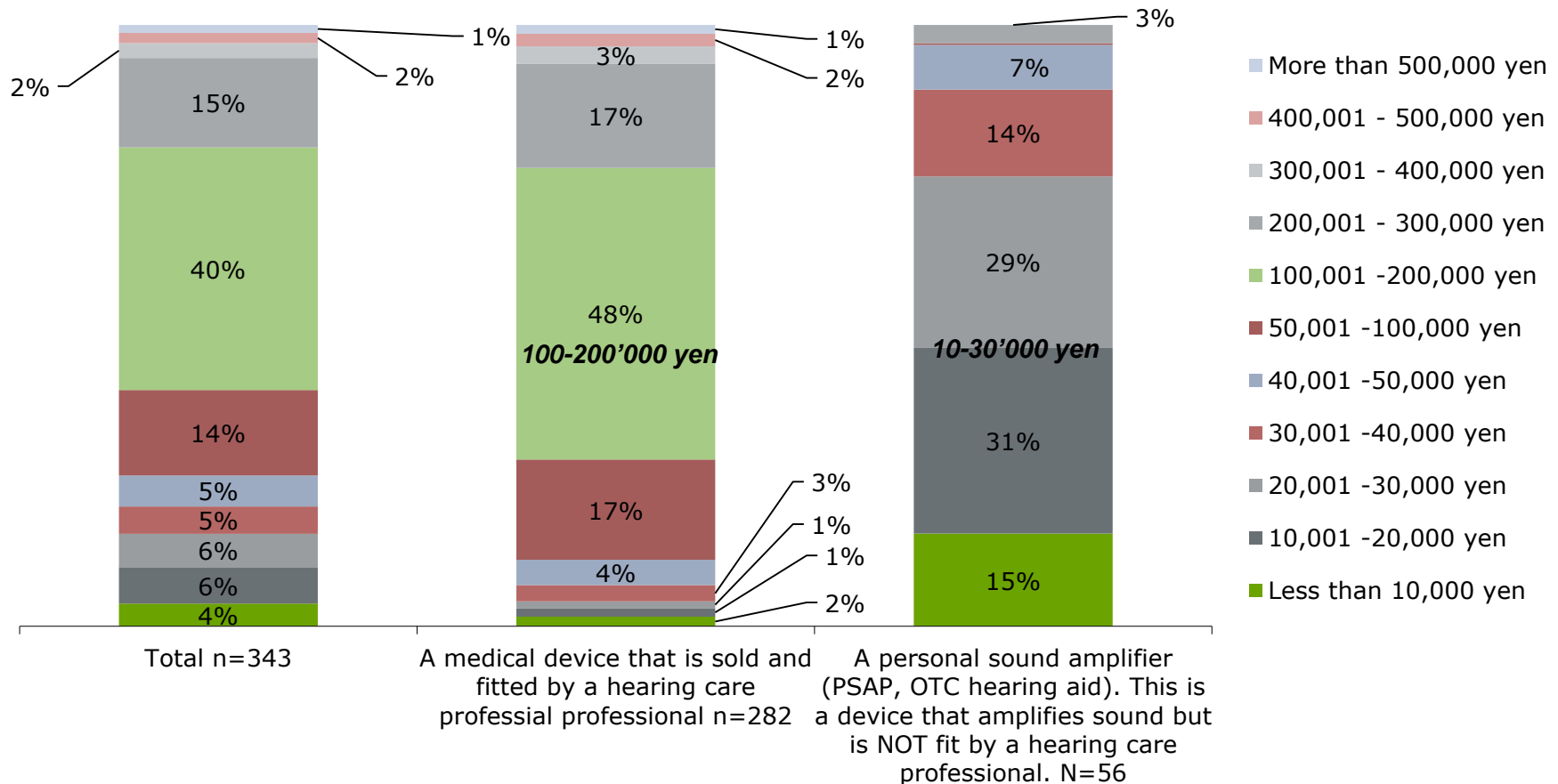
# Hearing aids need to be refitted about 3-10 times

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



# An average price for a hearing aid is 150'000 yen

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





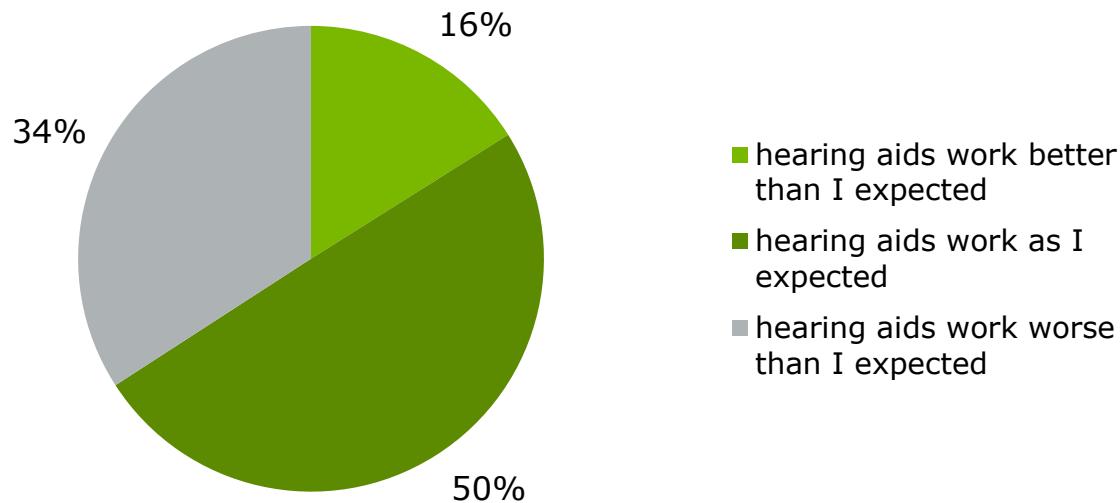
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# Satisfaction with hearing aids and drivers



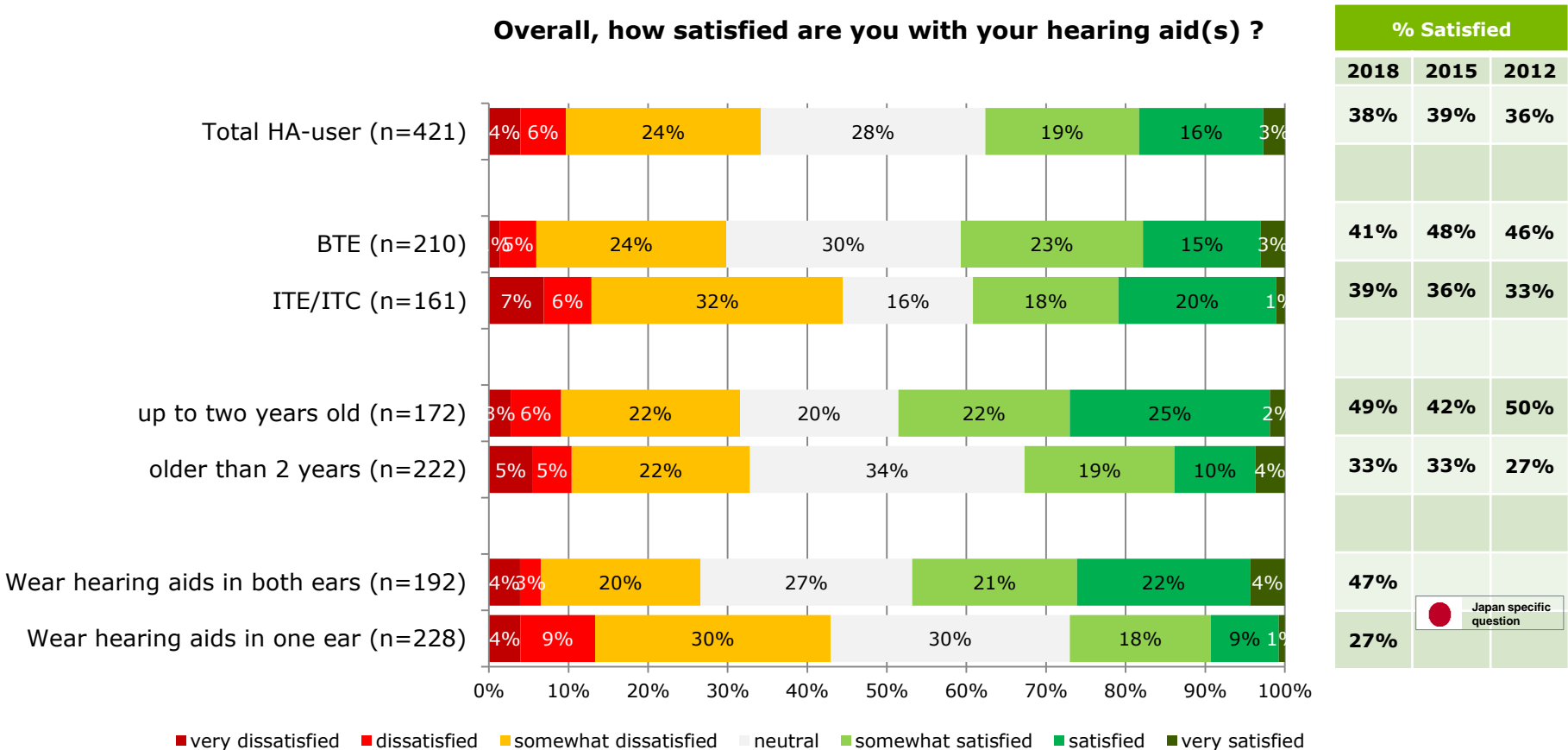
# 66% of the hearing aid owners say their hearing aid works better than or as expected

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



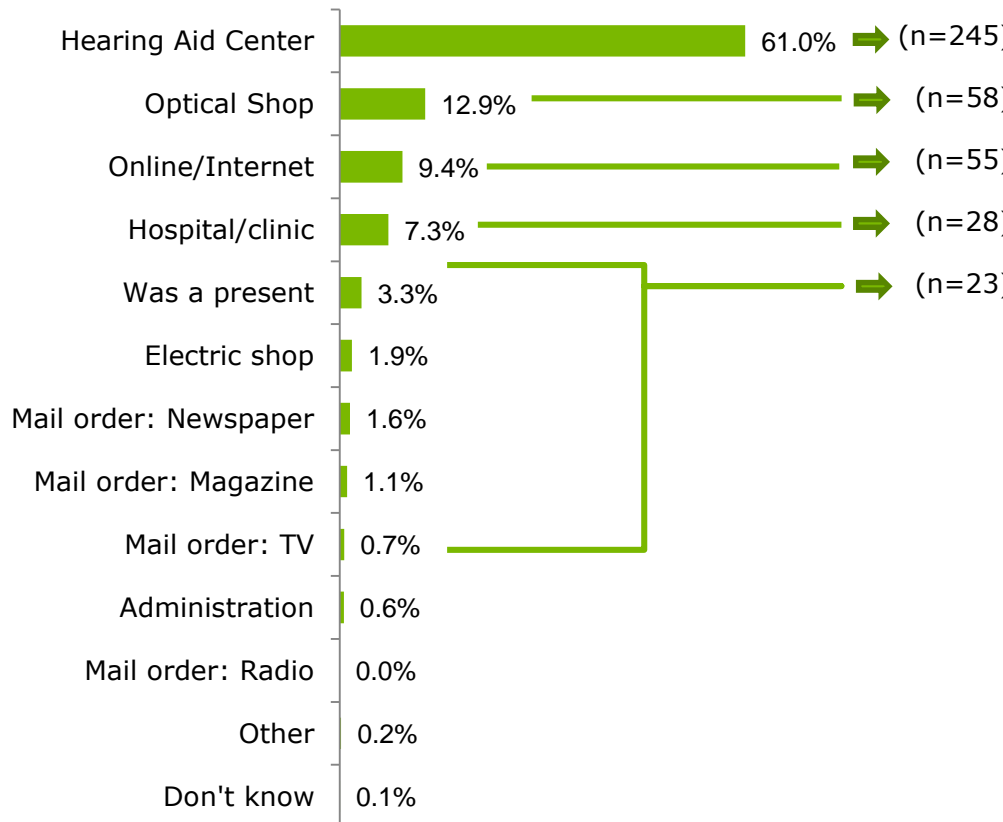
# Overall satisfaction with HA is 38%

Overall, how satisfied are you with your hearing aid(s) ?

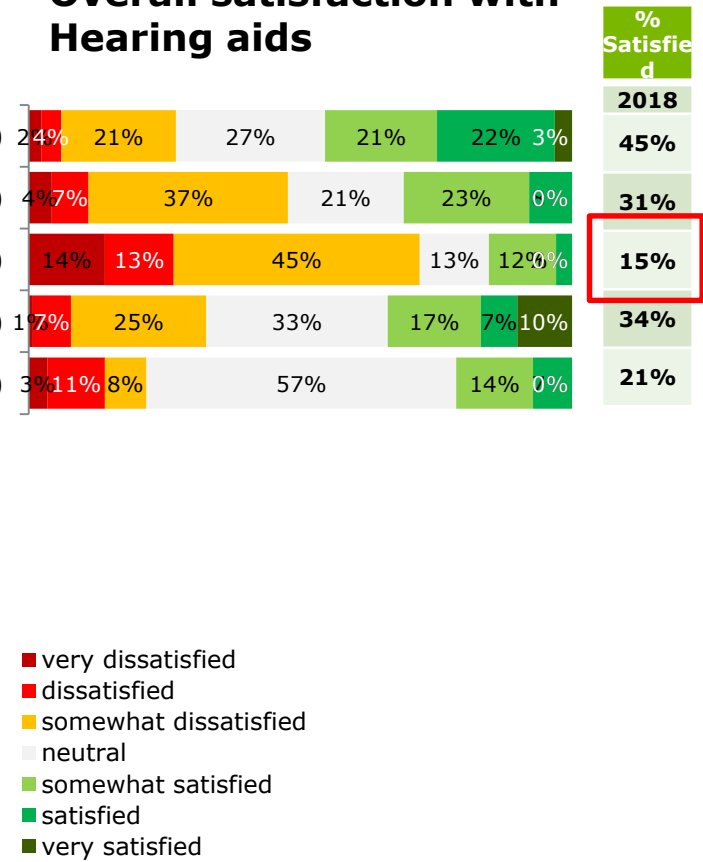


Satisfaction with hearing aids purchased at hearing aid centers is higher than with those purchased elsewhere. Satisfaction with those bought on the internet is devastating.

## Where was your most current hearing aid purchased?



## Overall satisfaction with Hearing aids



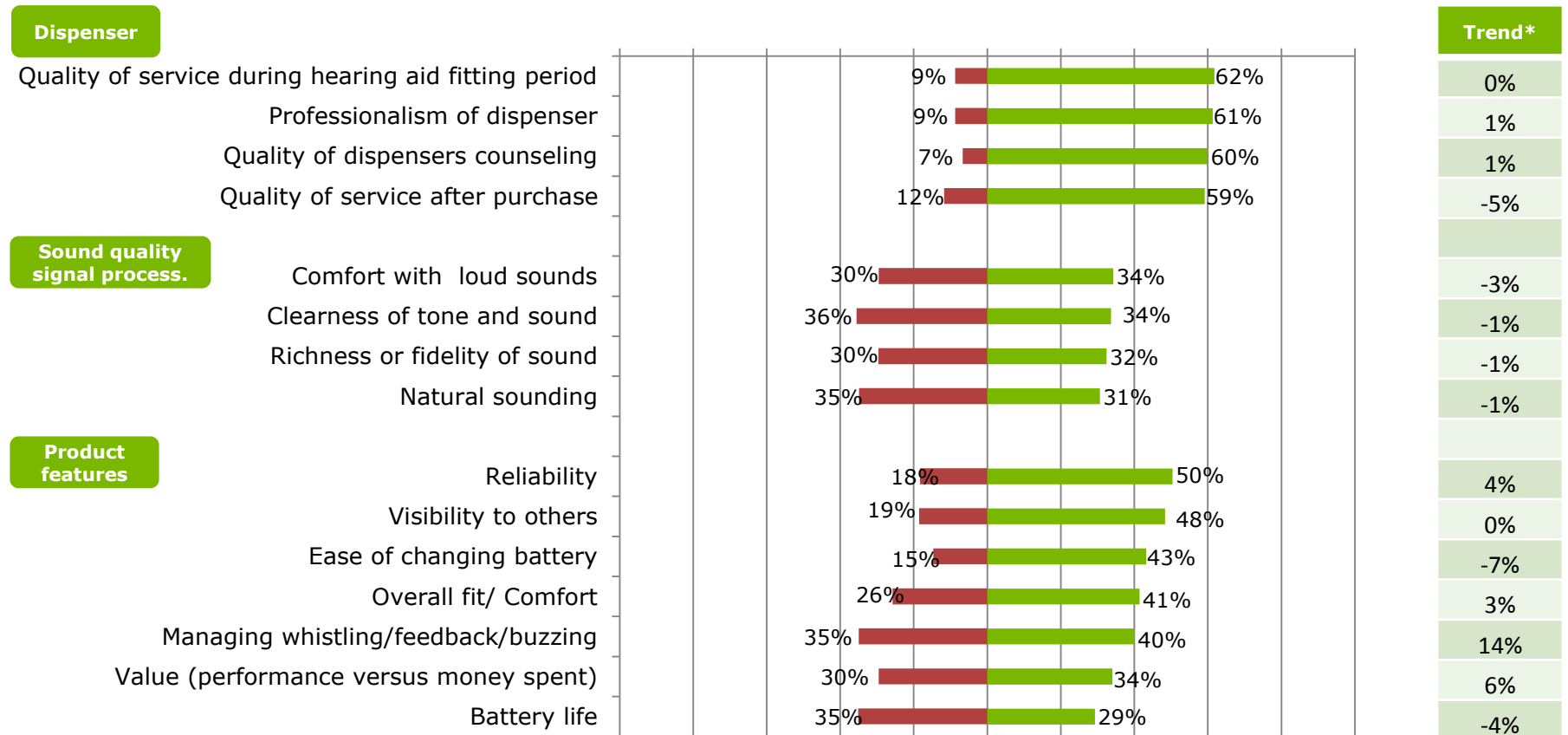
Base: N=421



# Overall Satisfaction with HA: Country comparison

	UK	Bel- gium	Nerther- lands	Poland	France	Switzer- land	Den- mark	Norway	<b>Italy</b>	Japan
Overall satisfaction 2012	72%	-	-	-	80%	84%	70%	72%	70%	<b>36%</b>
Overall satisfaction 2015/16/17	70%	80%	73%	80%	84%	81%	71%	-	79%	<b>39%</b>
Overall satisfaction 2018	74%				82%				81%	<b>38%</b>

# Satisfaction with current hearing aids



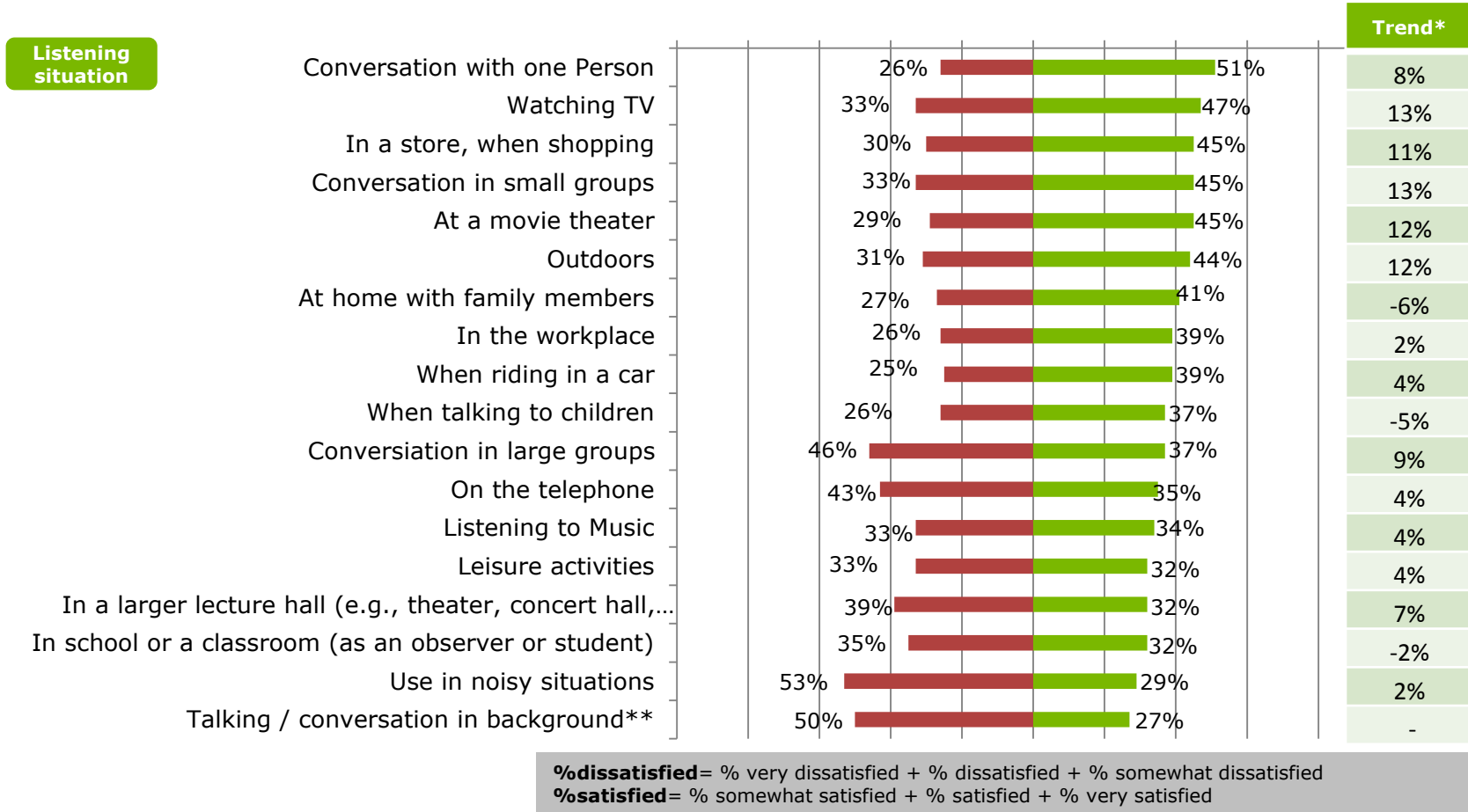
%dissatisfied= % very dissatisfied + % dissatisfied + % somewhat dissatisfied  
 %satisfied= % somewhat satisfied + % satisfied + % very satisfied

\* % of satisfied HA owners compared to JapanTrak 2015

■ dissatisfied ■ satisfied

HA-owner, n=421

# Satisfaction with current hearing aids



% of satisfied HA owners compared to JapanTrak 2015

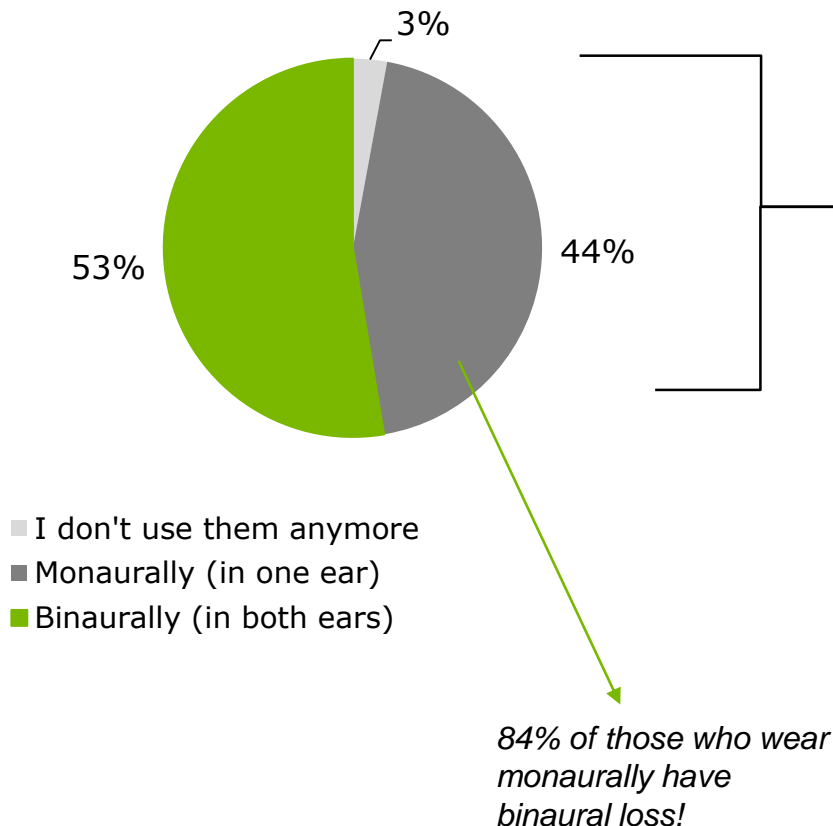
\*\* JapanTrak specific

HA-owner, n=421

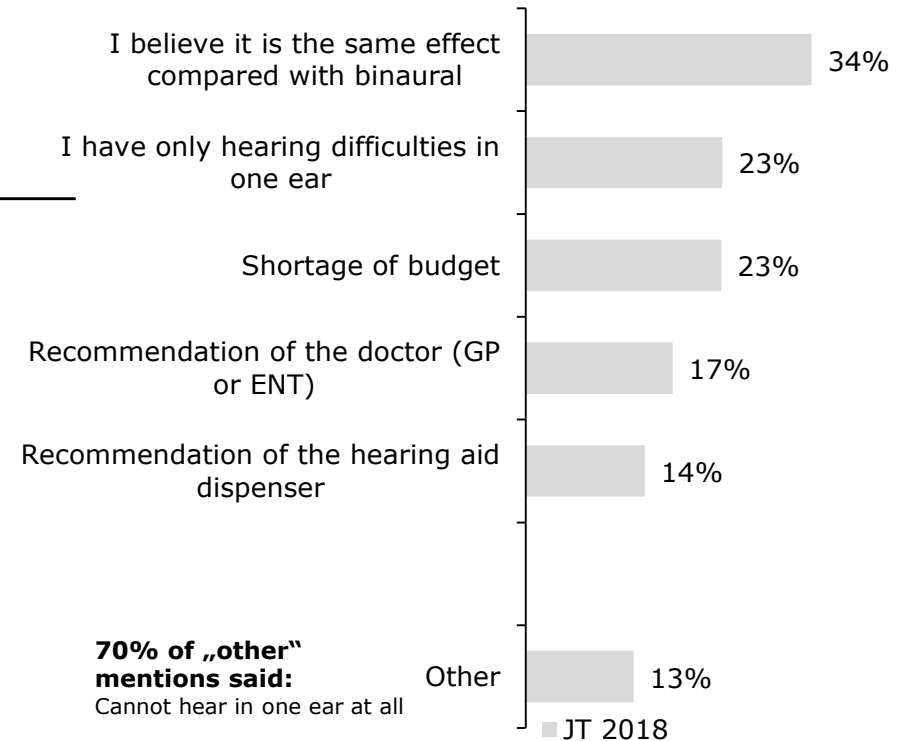


# Most people with only one hearing aid believe it is the same effect compared with two hearing aids

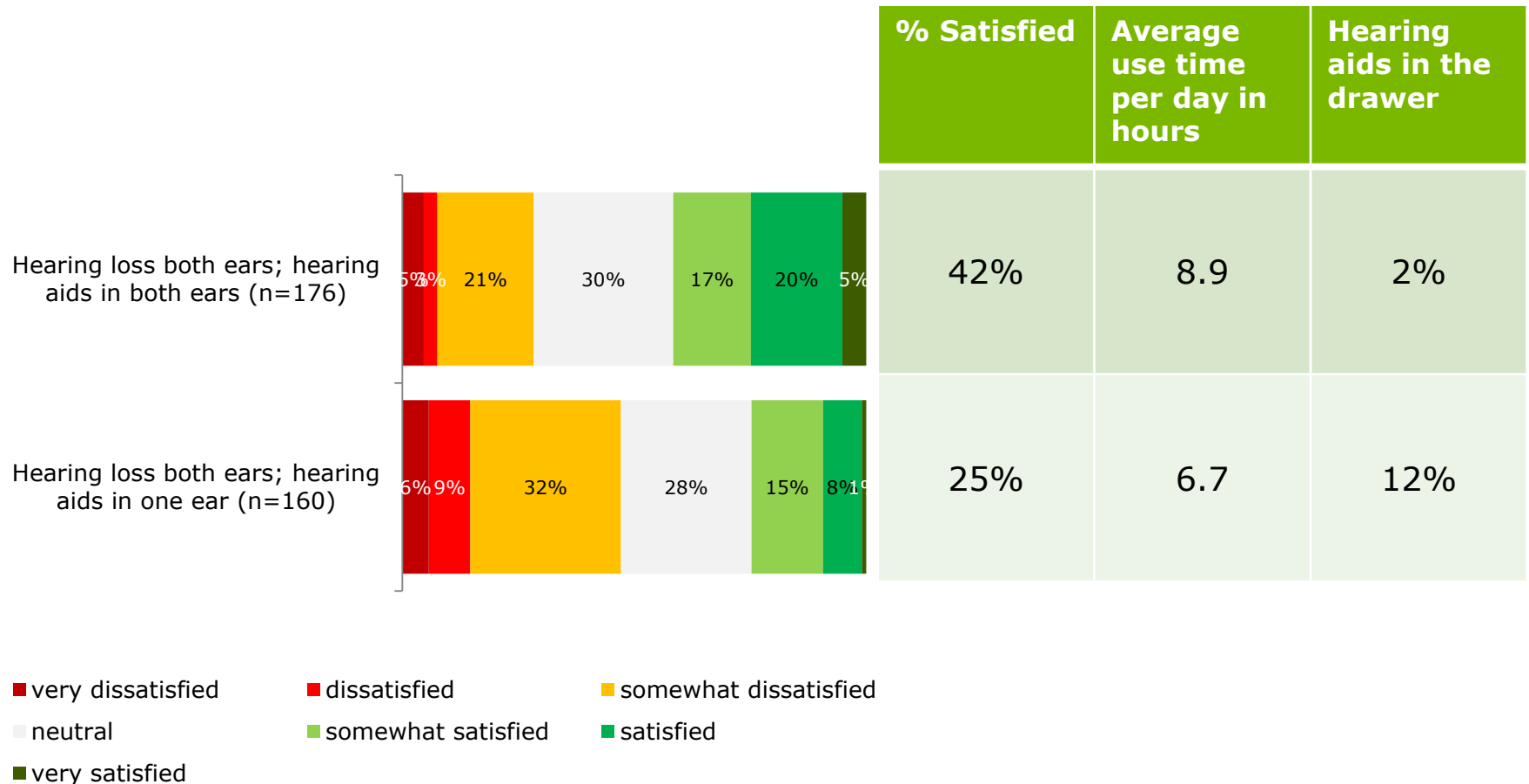
Do you wear hearing aids monaurally or binaurally?



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

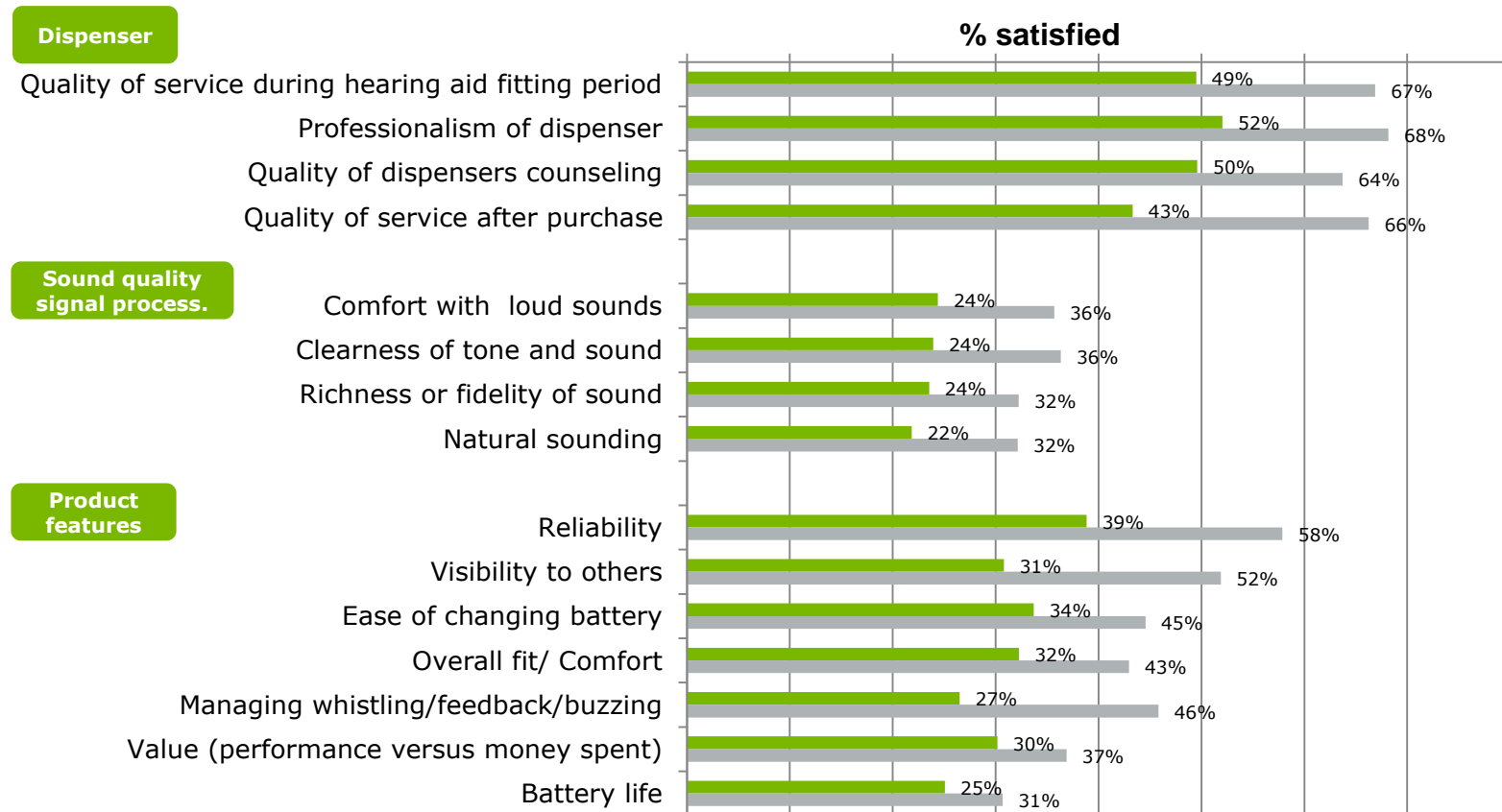


# Binaural treatment leads to higher satisfaction, longer use time per day and less unused hearing aids



# Satisfaction with current hearing aids I

## Binaural vs. monaural treatment



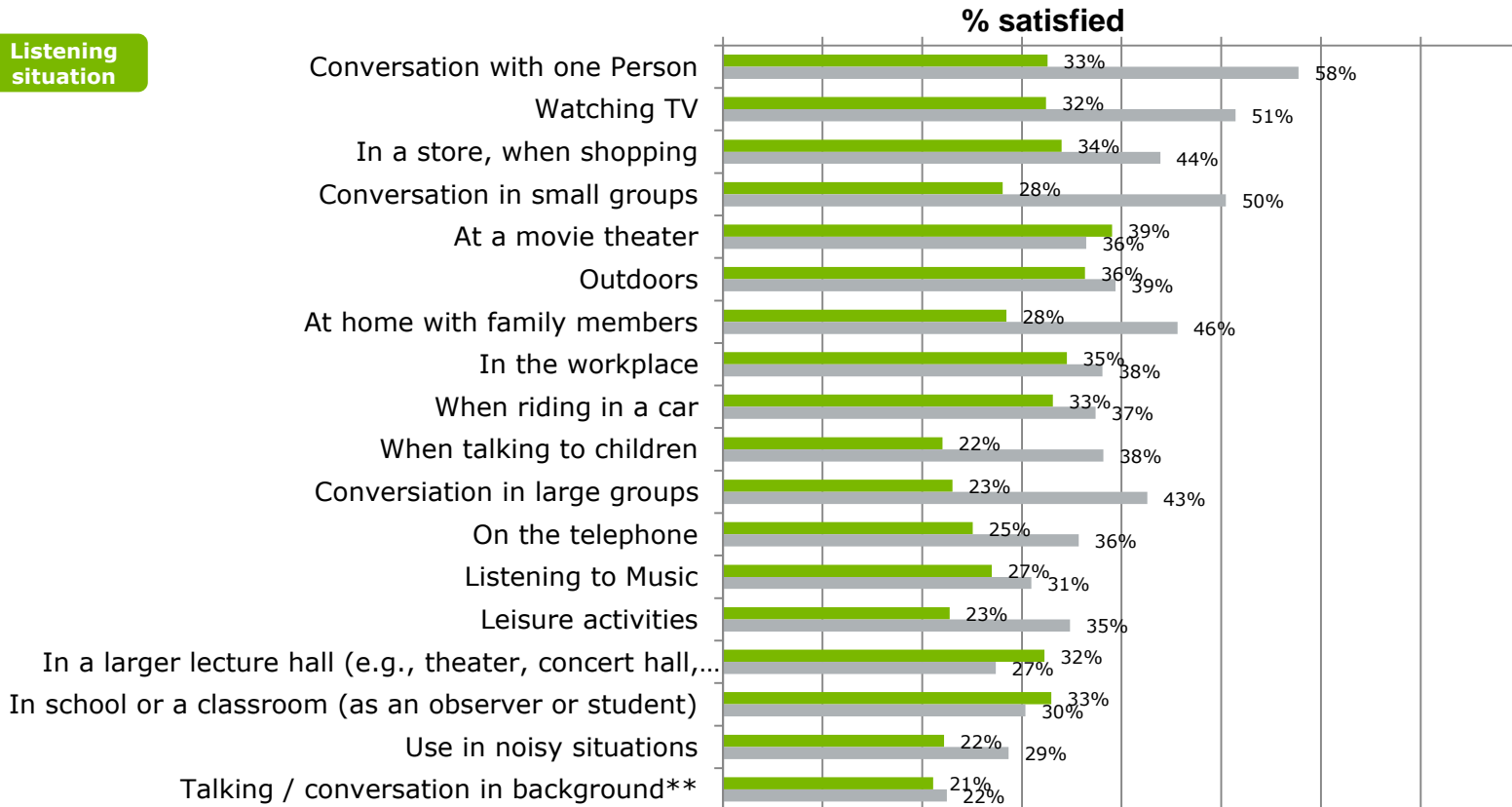
■ Hearing loss both ears; hearing aids in one ear (n=160)

■ Hearing loss both ears; hearing aids in both ears (n=176)

# Satisfaction with current hearing aids II

## Binaural vs. monaural treatment

**Listening situation**



■ Hearing loss both ears; hearing aids in one ear (n=160)

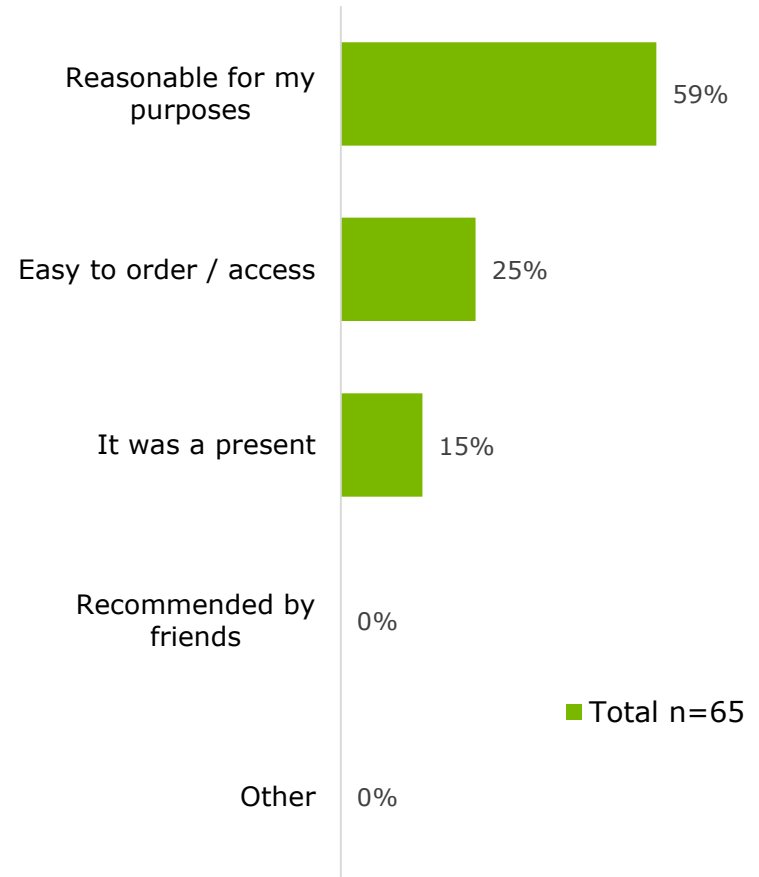
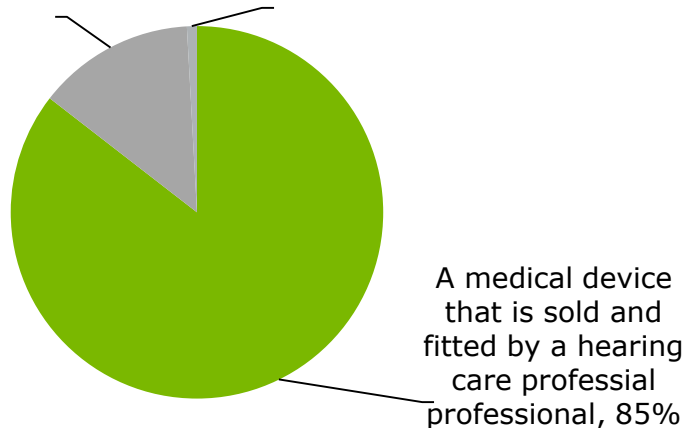
■ Hearing loss both ears; hearing aids in both ears (n=176)

# Those hearing impaired who own PSAP/OTC hearing aids believe that it is reasonable for their purposes

Would you classify your hearing aid as a... (n=421)

A personal sound amplifier (PSAP, OTC hearing aid). This is a device that amplifies sound but is NOT fit by a hearing care professional., 14%

Don't know, 1%



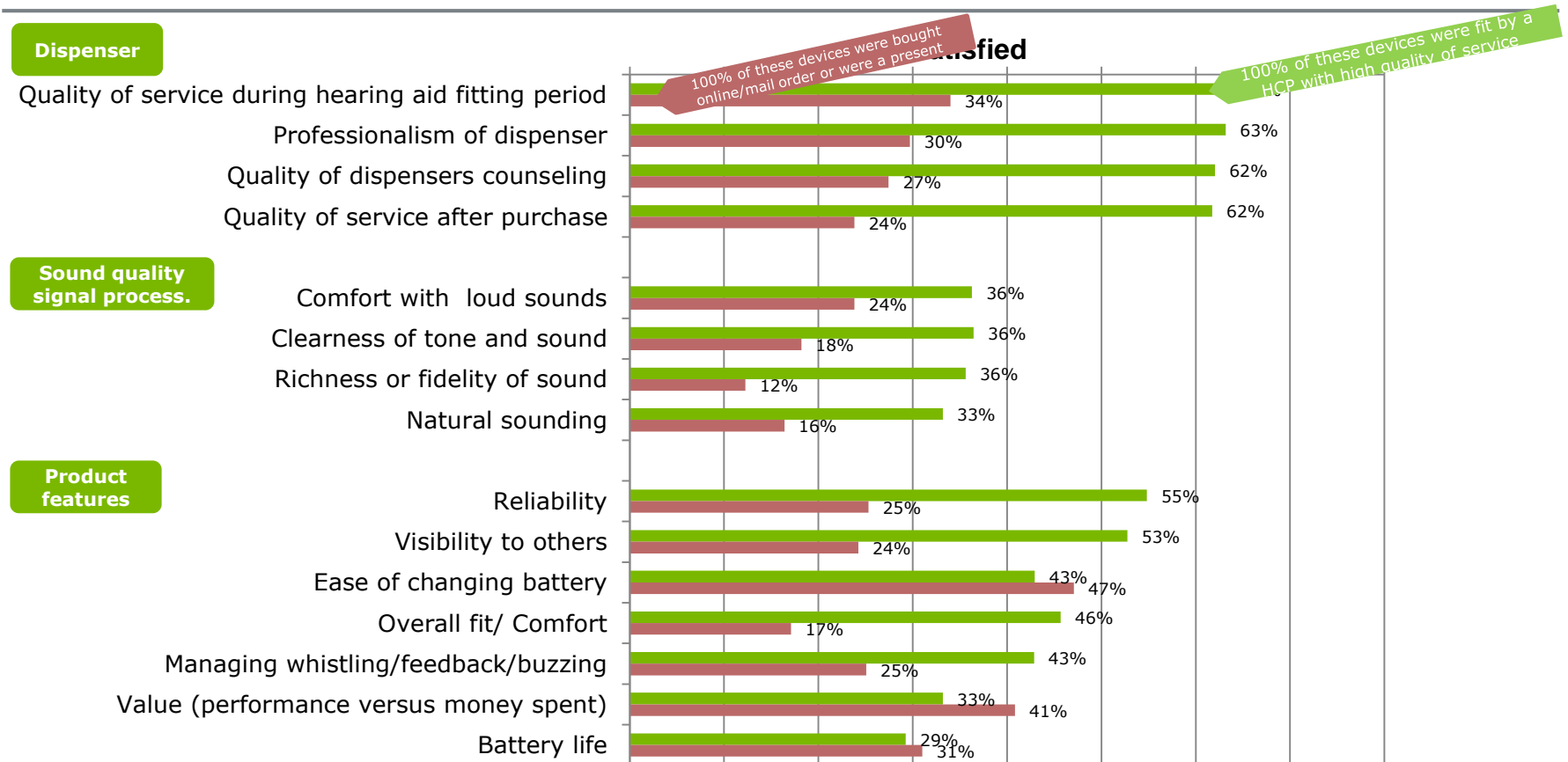


Satisfaction with medical hearing devices fitted by a hearing care professional is much higher than with PSAP's/OTC hearing aids.



# Satisfaction with current hearing aids I

## Medical device vs. PSAP/OTC



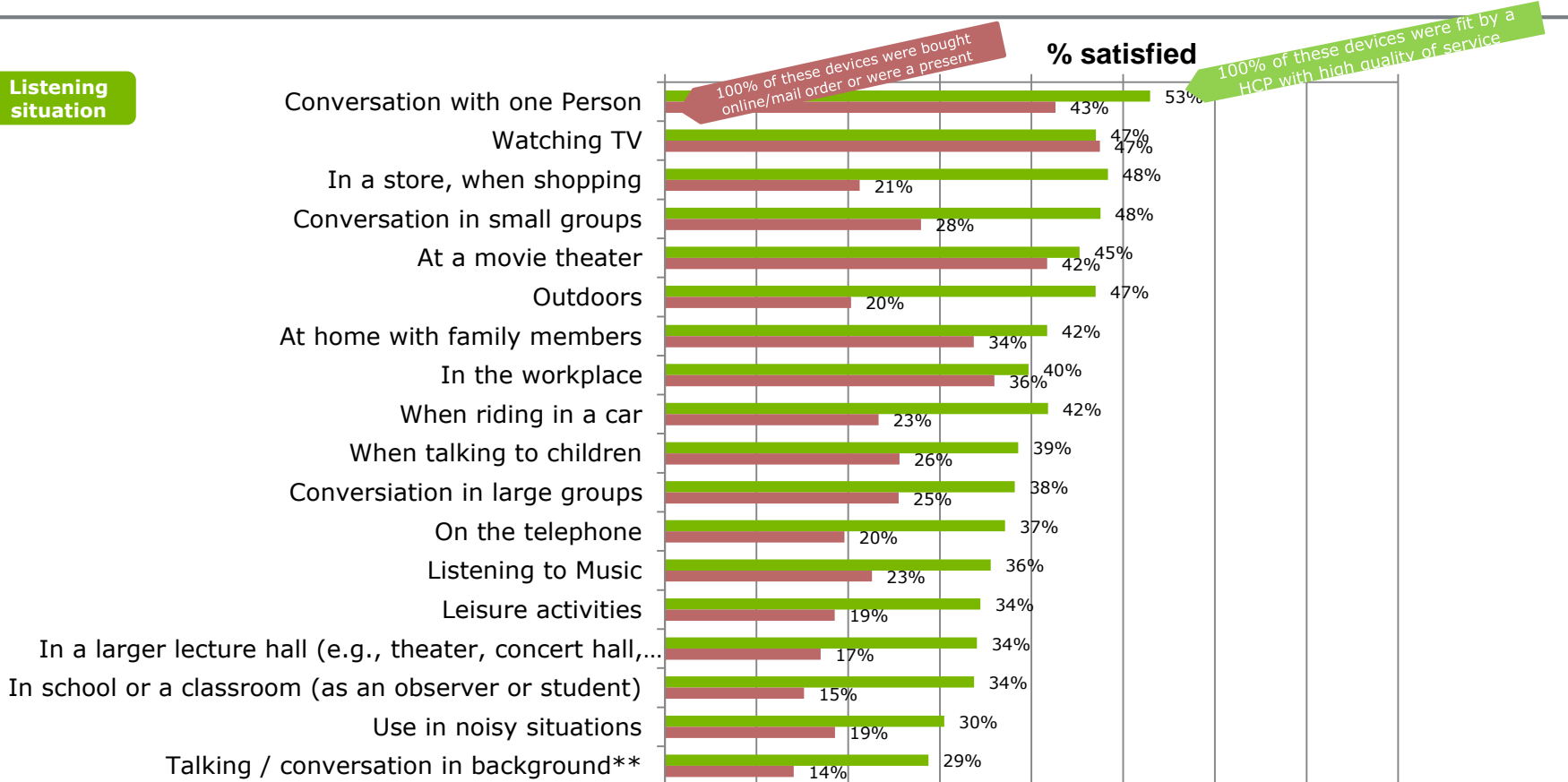
■ A medical device that is sold and fitted by a hearing care professional n=348

■ A personal sound amplifier (PSAP, OTC hearing aid). This is a device that amplifies sound but is NOT fit by a hearing care professional. N=65

# Satisfaction with current hearing aids II

## Medical device vs. PSAP/OTC

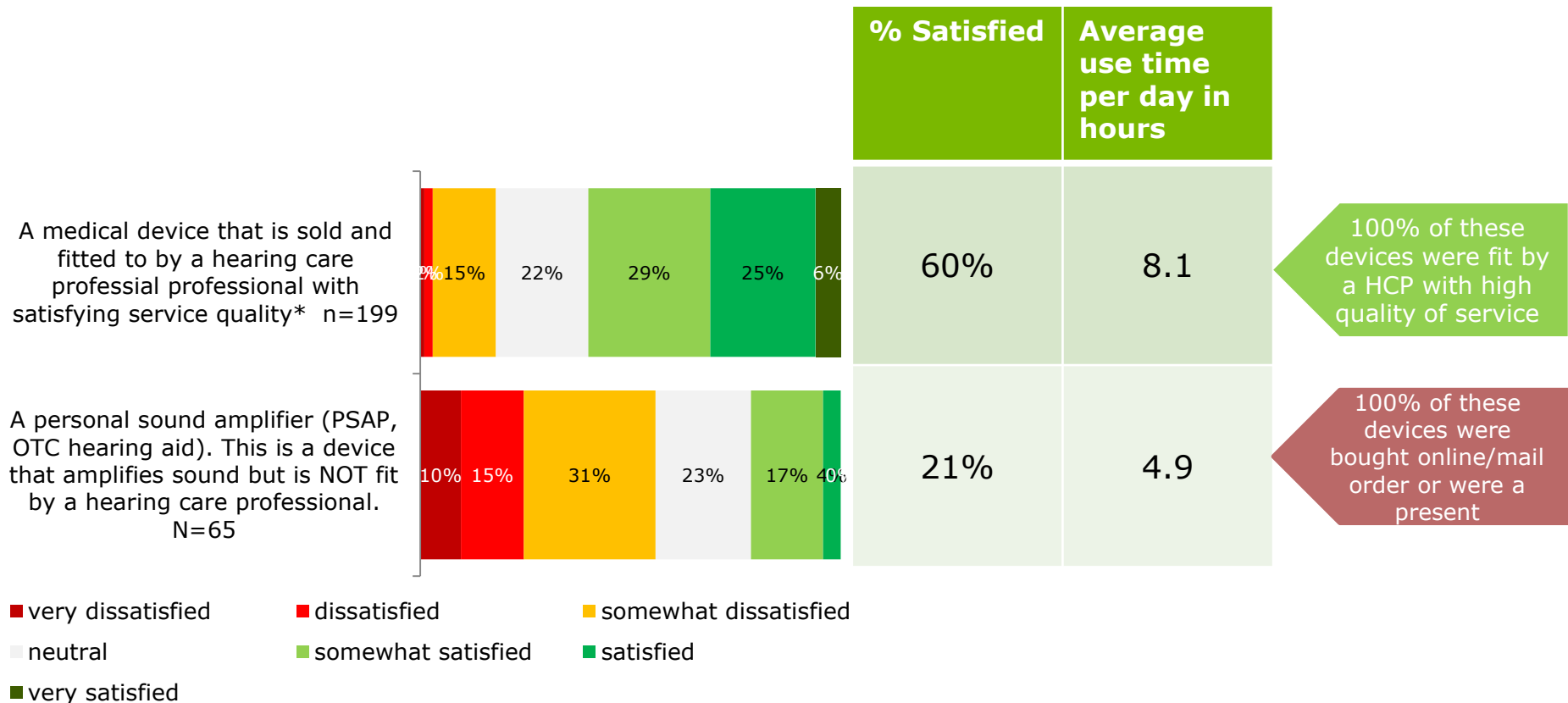
### Listening situation



■ A medical device that is sold and fitted by a hearing care professional n=348

■ A personal sound amplifier (PSAP, OTC hearing aid). This is a device that amplifies sound but is NOT fit by a hearing care professional. N=65

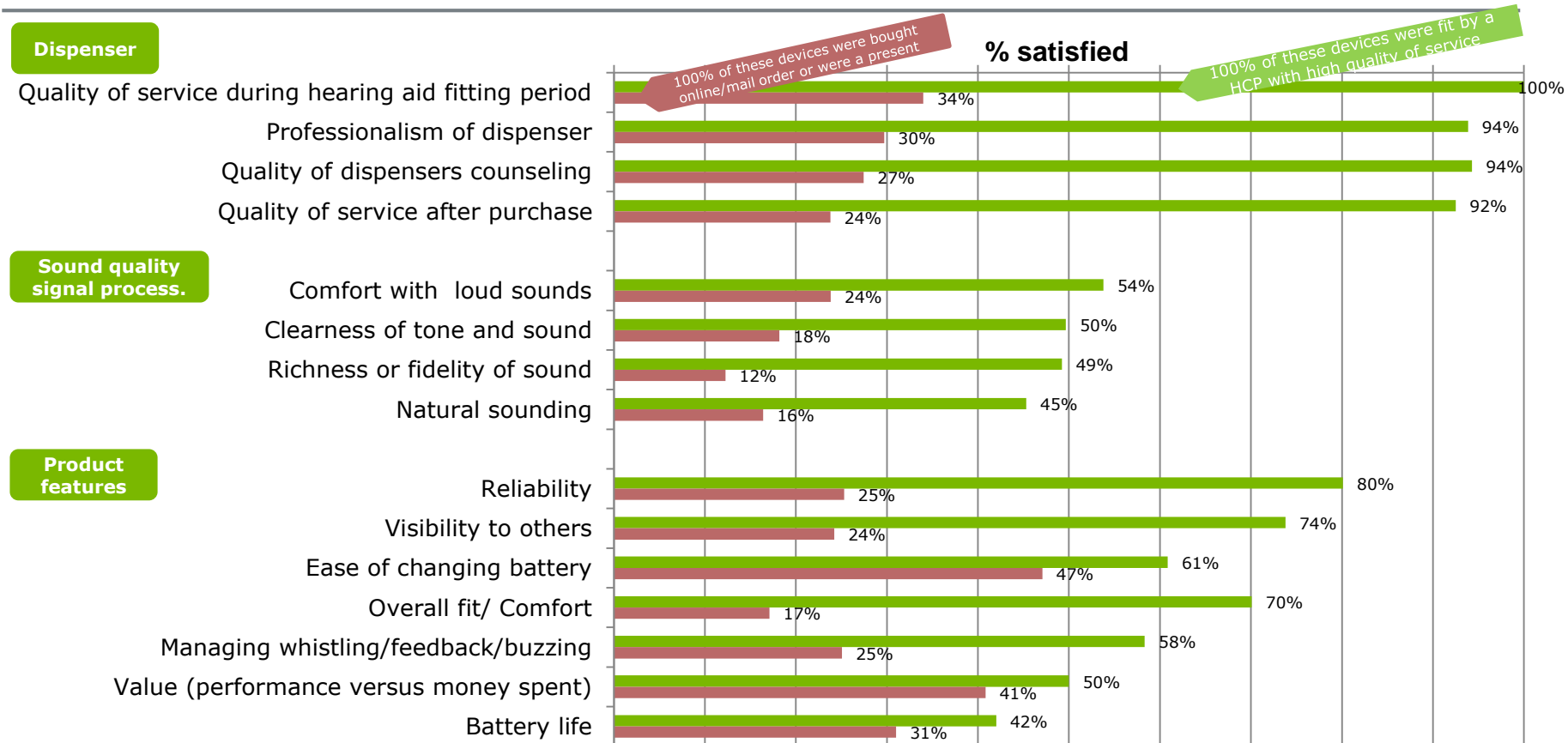
# Satisfaction with medical hearing devices fitted by a hearing care professional is much higher than with PSAP's/OTC hearing aids.



\* a) Fitted by a hearing care professional at least once  
b) Satisfied with quality of service during fitting period

# Satisfaction with current hearing aids I

## Medical device vs. PSAP/OTC



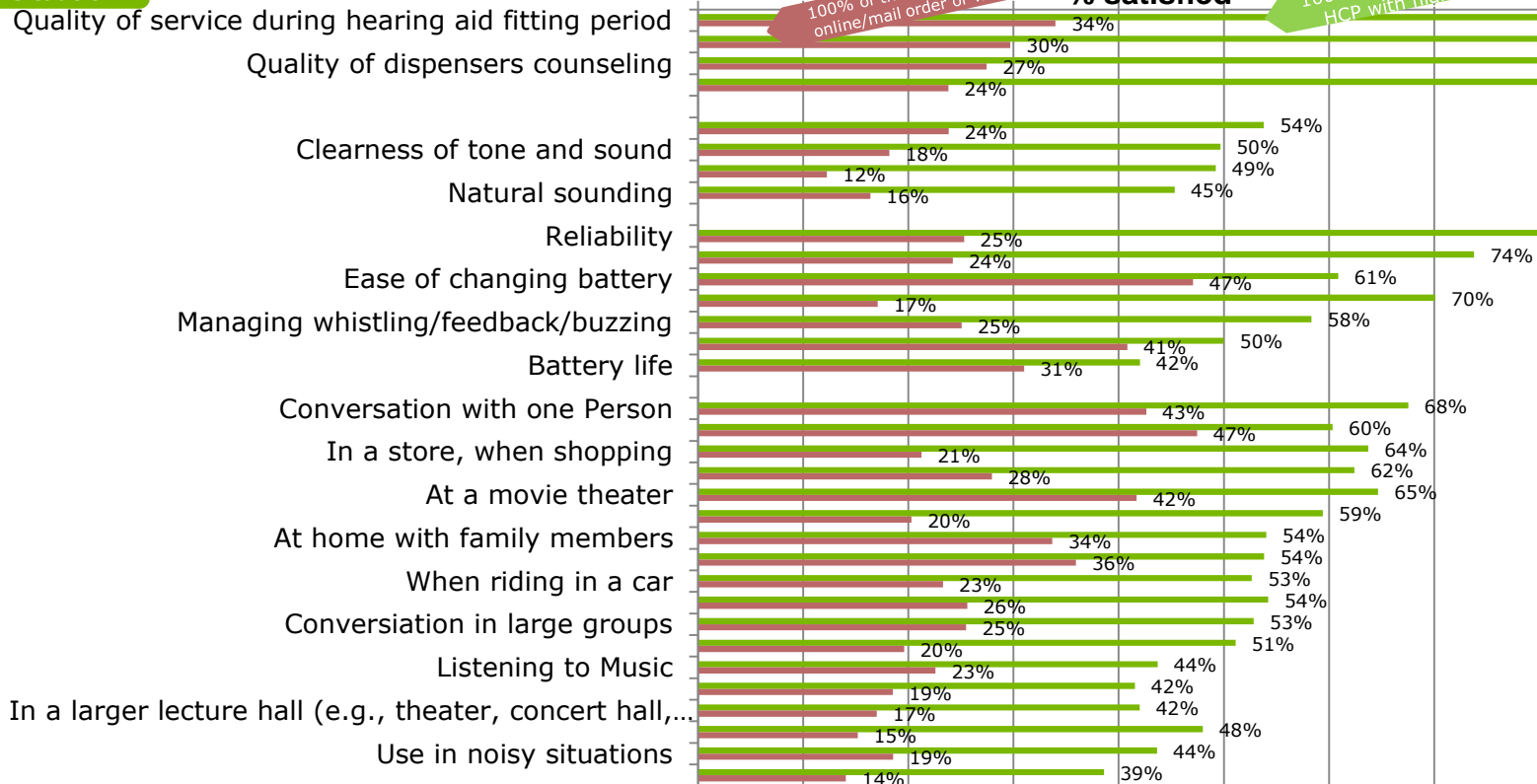
■ A medical device that is sold and fitted to by a hearing care professional with satisfying service quality\* n=199

■ A personal sound amplifier (PSAP, OTC hearing aid). This is a device that amplifies sound but is NOT fit by a hearing care professional. N=65

# Satisfaction with current hearing aids II

## Medical device vs. PSAP/OTC

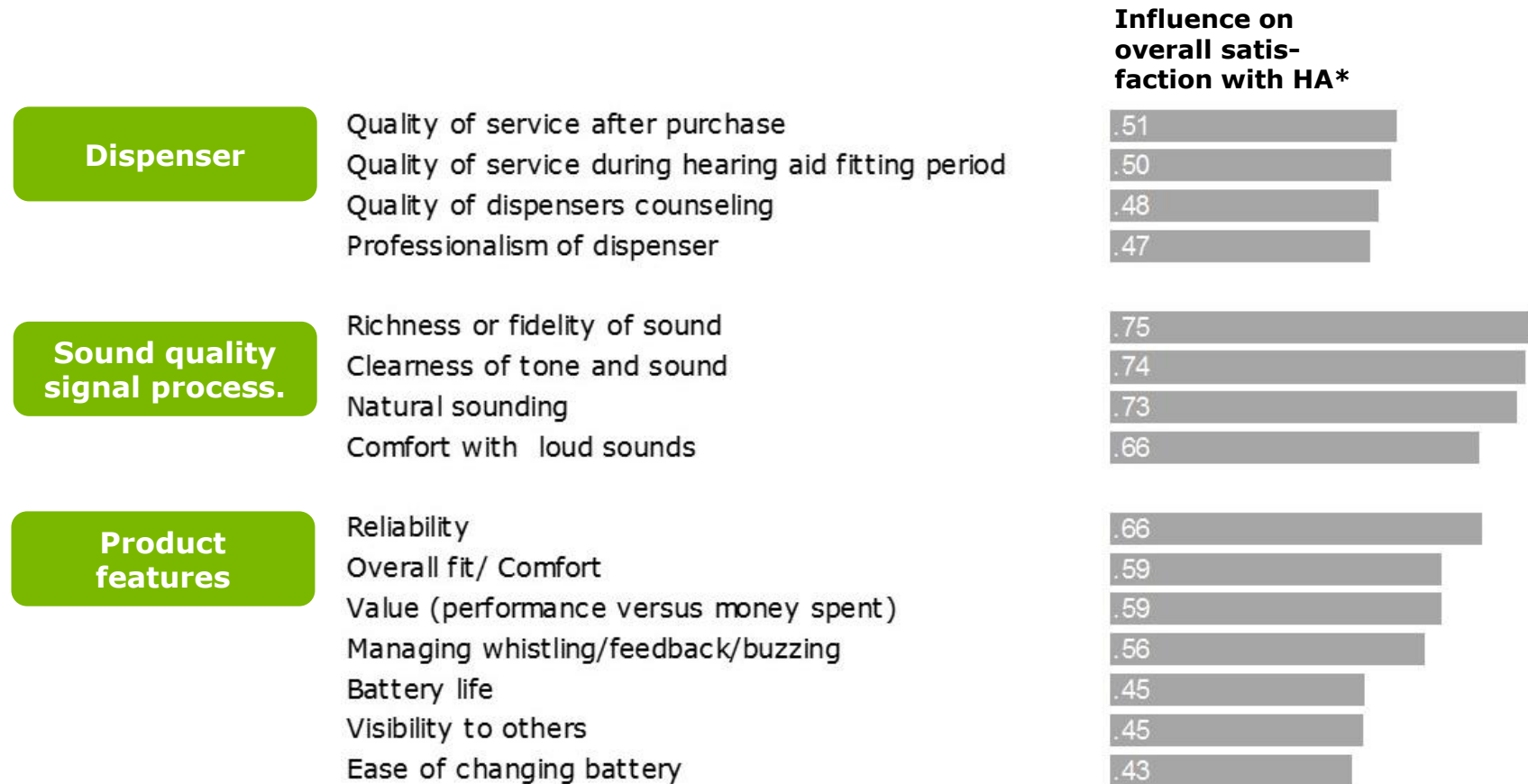
### Listening situation



■ A medical device that is sold and fitted to by a hearing care professional with satisfying service quality\* n=199

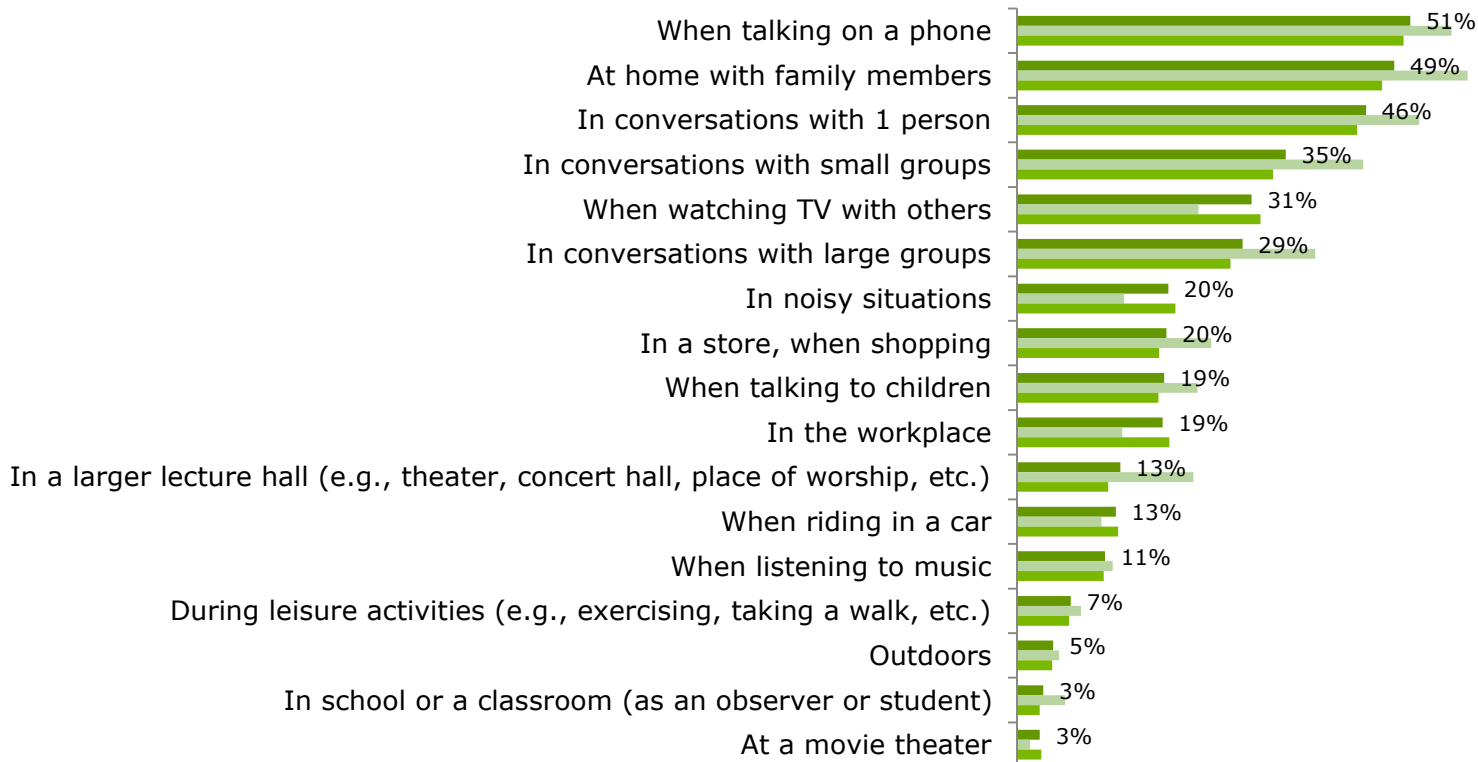
■ A personal sound amplifier (PSAP, OTC hearing aid). This is a device that amplifies sound but is NOT fit by a hearing care professional. N=65

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



# Important listening situations

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



■ Hearing loss Total (n=1'306)  
 ■ Hearing aid (n=421)  
 ■ Hearing loss but no hearing aid (n=885)





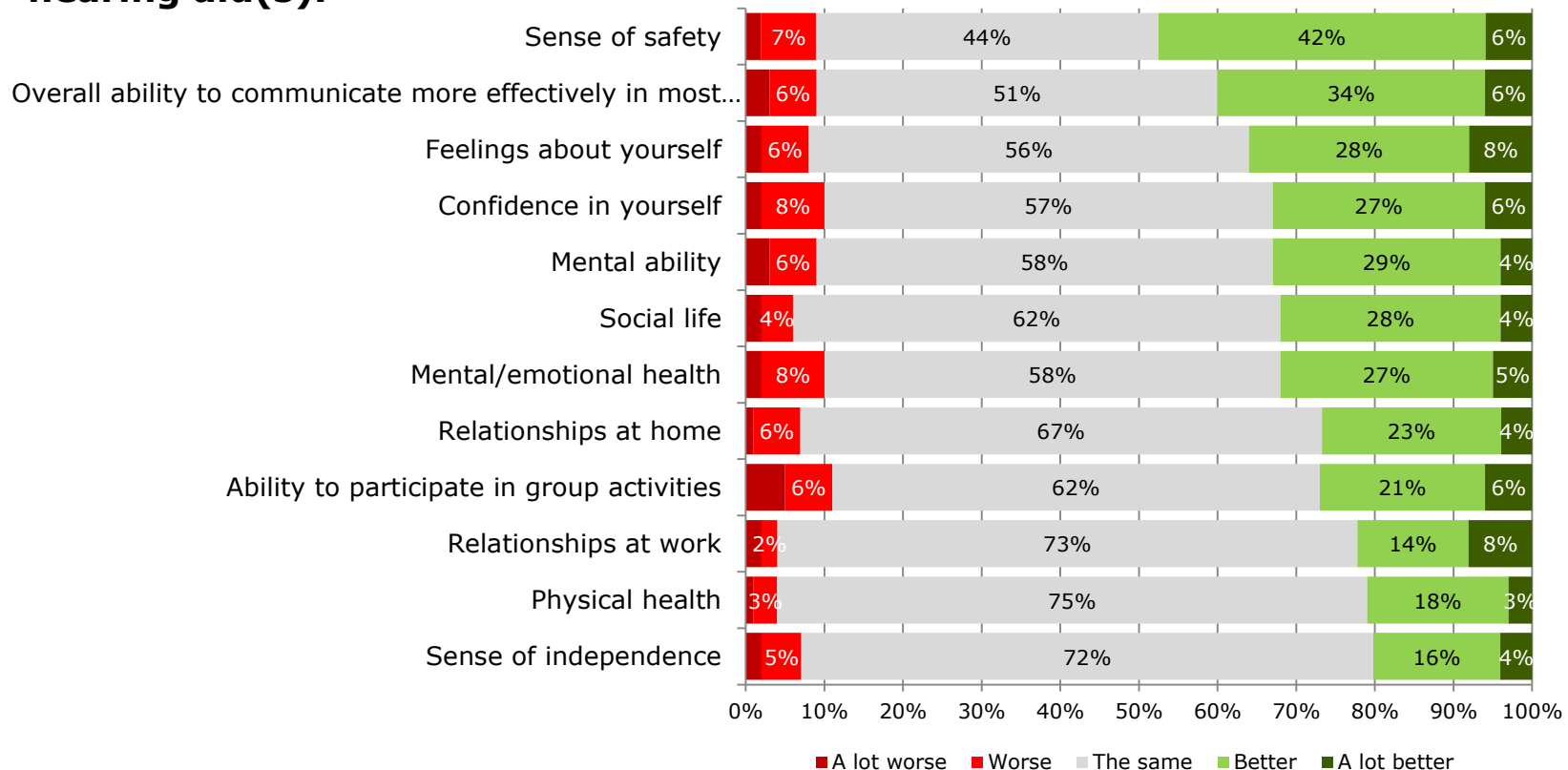
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# Positive impact of hearing aids, quality of life



# Significant positive impact of HAs on different aspects: Especially “sense of safety”, “ability to communicate more effectively” and “feelings about yourself” improved

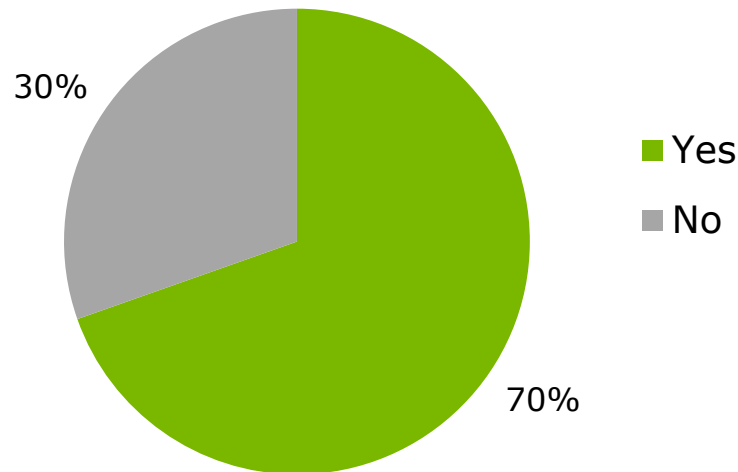
**Since you started using your hearing aid(s), please rate the changes you have experienced in each of the following areas, that you believe are due to your hearing aid(s).**



HA-owner, n=421

# Most hearing aid owners feel more confident moving in a city and driving their car since wearing hearing aids!

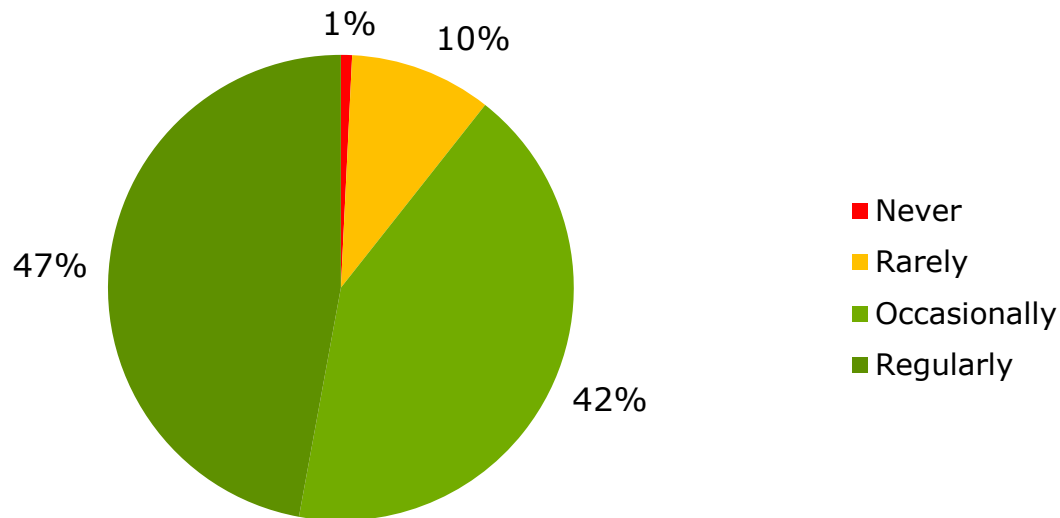
Since wearing a hearing aid, do you feel more confident moving in a city, e.g. because you hear traffic signals/vehicles approaching?



Base: N=421

# 89% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

How often do your hearing aids improve your quality of life?





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





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

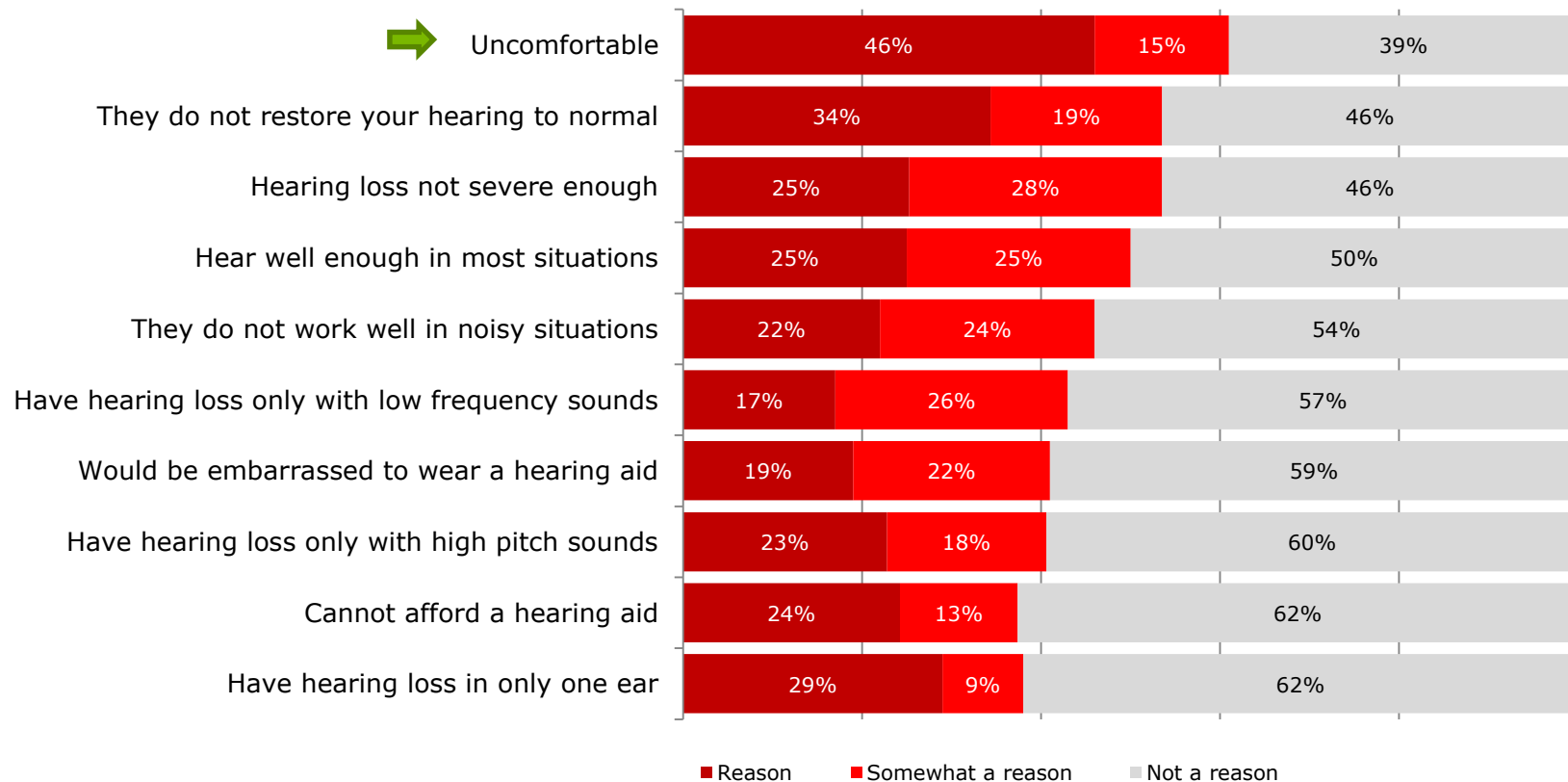


To analyze reasons of non-adoption we look at the Top 50% HL group, as the structure of hearing loss is more similar to that of HA owners

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

	% HA Owner (n=421)	%HA-Non- owner Low 50% HL (n=345)	%HA-Non- owner Top 50% HL (n=212)
<b>Ears impaired</b>			
Unilateral loss	20%	50%	38%
Bilateral loss	80%	50%	62%
<b>Perceived loss</b>		More similar hearing loss- structure	
Mild	24%	52%	33%
Moderate	51%	44%	57%
Severe	17%	4%	5%
Profound	7%	0%	5%

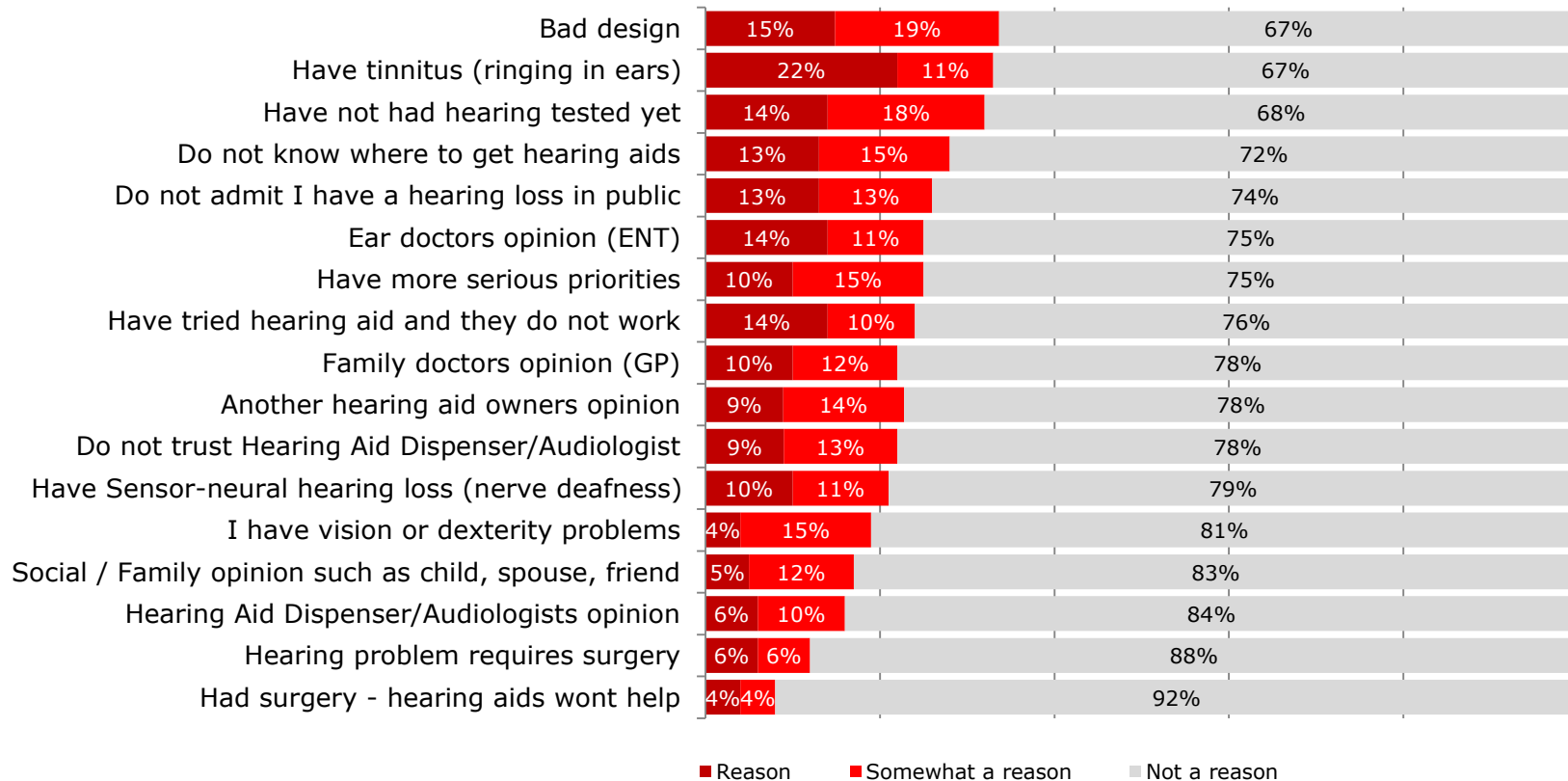
# Top 10 reasons for not having a hearing aid (I/II)



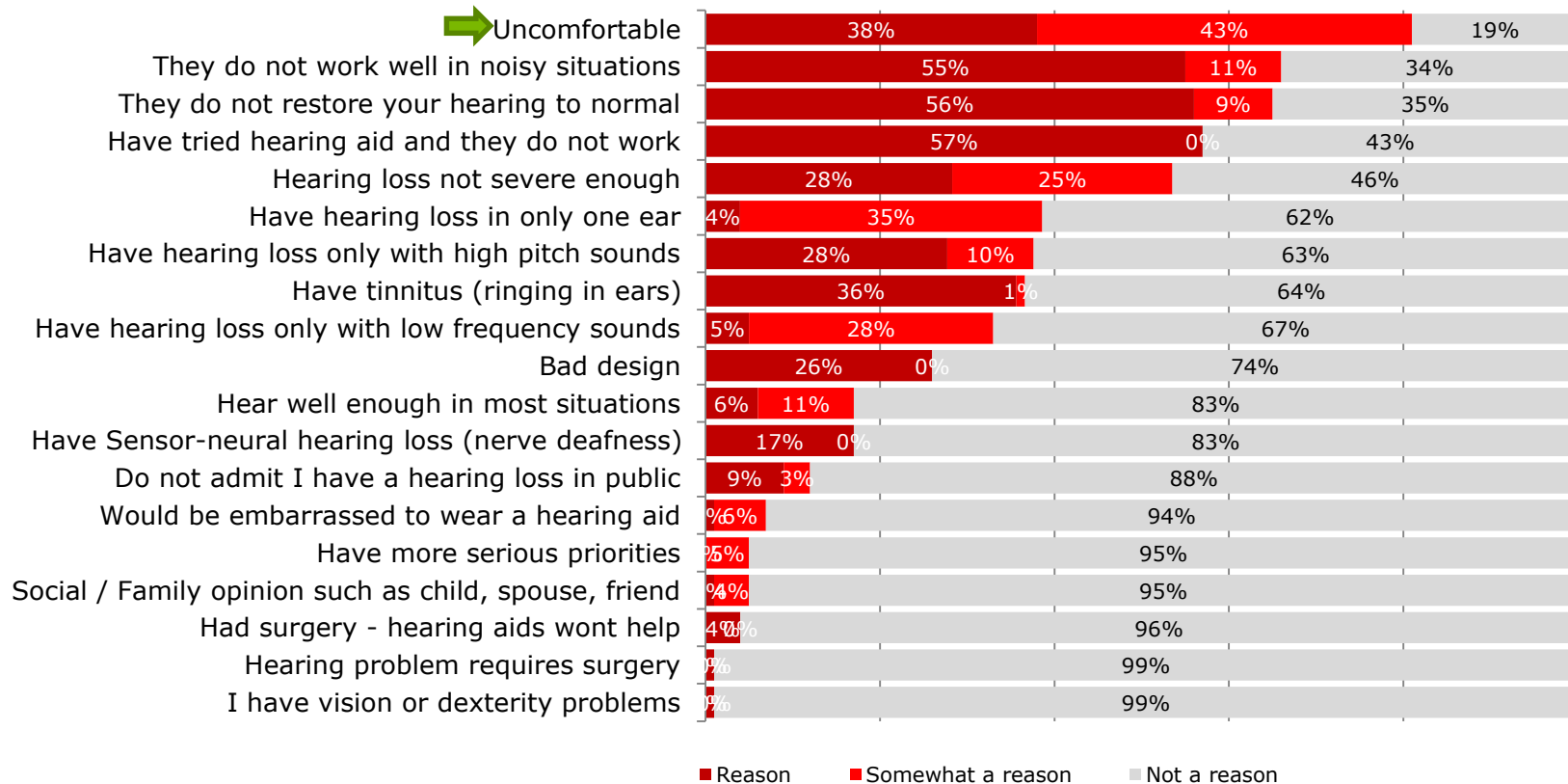
Base: non owners Top 50% HL: n=212



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



# Top 10 reasons for HA owners NOT using them



Owners who don't use, n=27

# Meaning of «uncomfortable» (open question) coded

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



Base: n=299



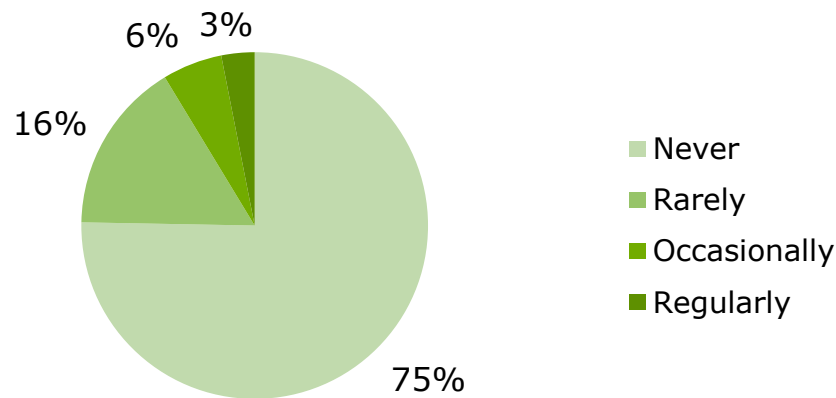
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# Social rejection, and triggers to buy

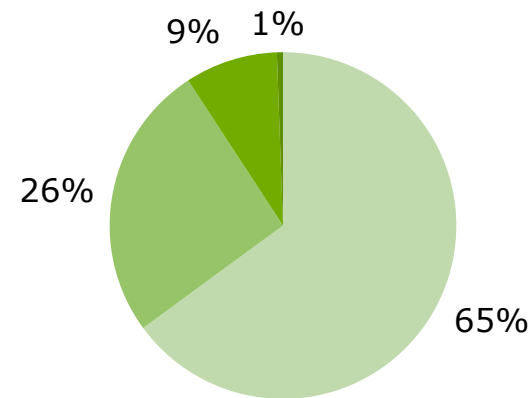


75% of hearing aid owners think people don't make fun of or reject them because of their hearing aids. It tends to be more likely that somebody makes fun or rejects a hearing impaired without hearing aids.

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



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



Base: N=421

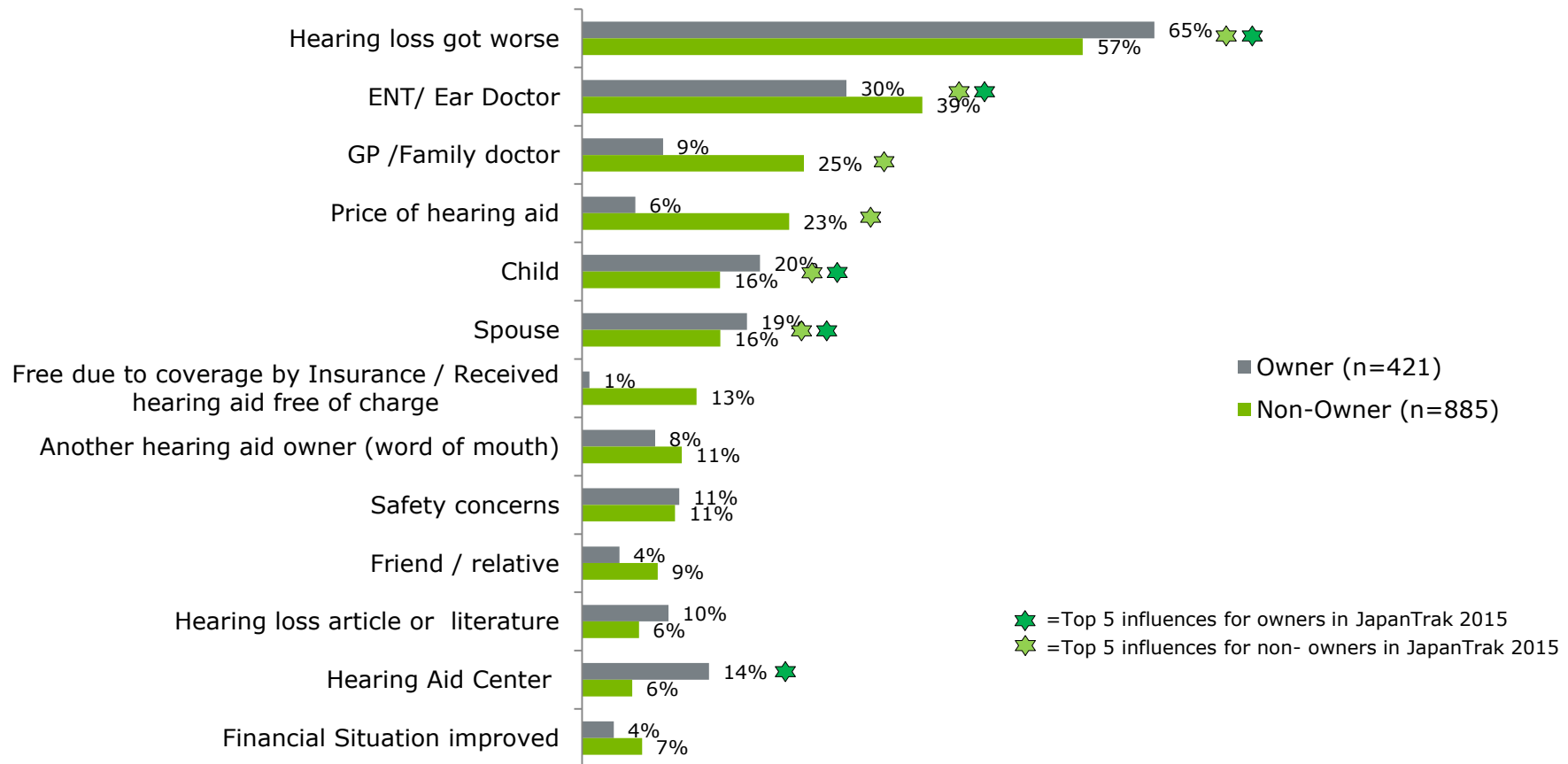
Base: Top 50% hearing loss, no hearing aid N=212

# The most important influencing factors are worsening hearing loss, ENT and significant others (and: price for non owners)

Page 1 of 2

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

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

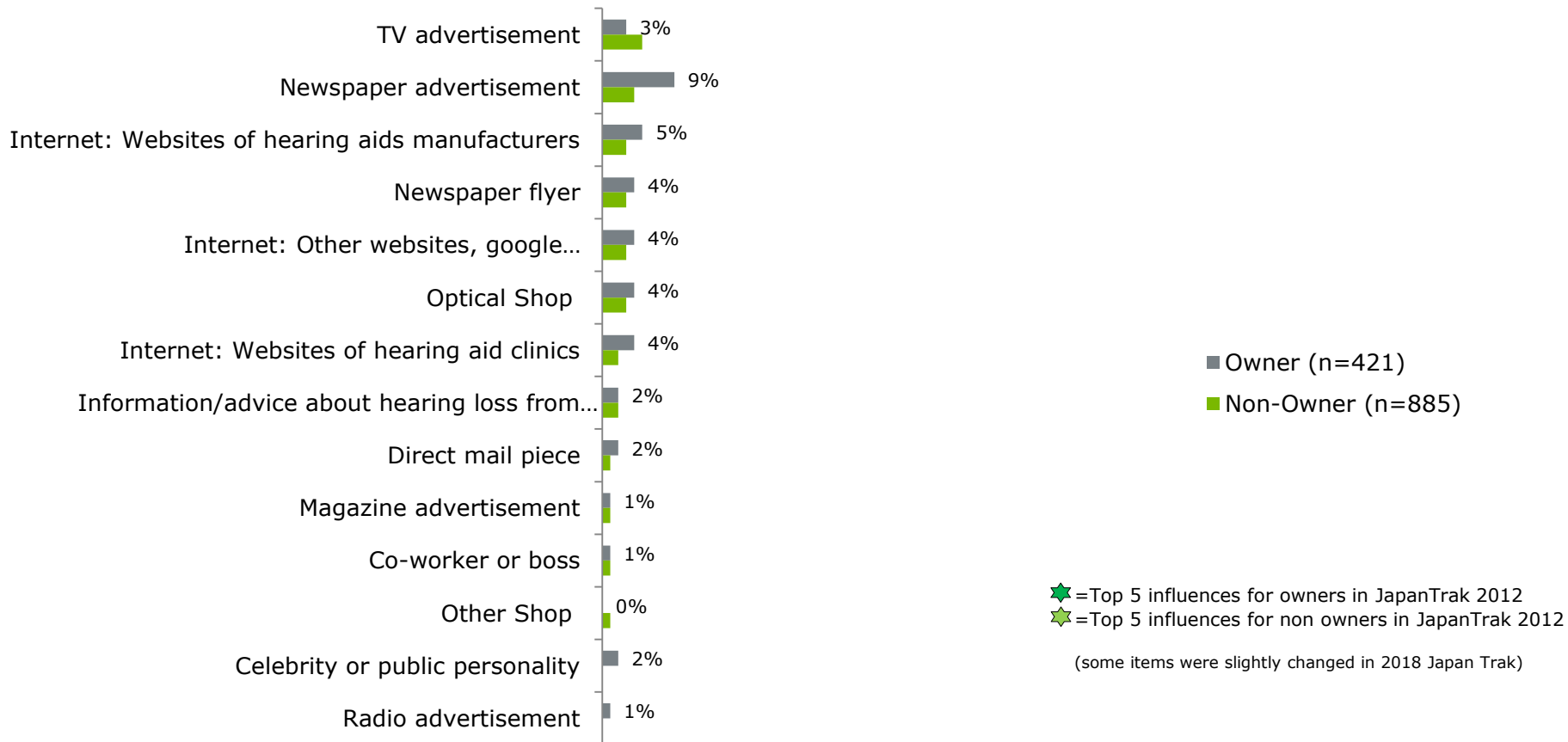


# The most important influencing factors are worsening hearing loss, ENT and significant others (and: price for non owners)

Page 2 of 2

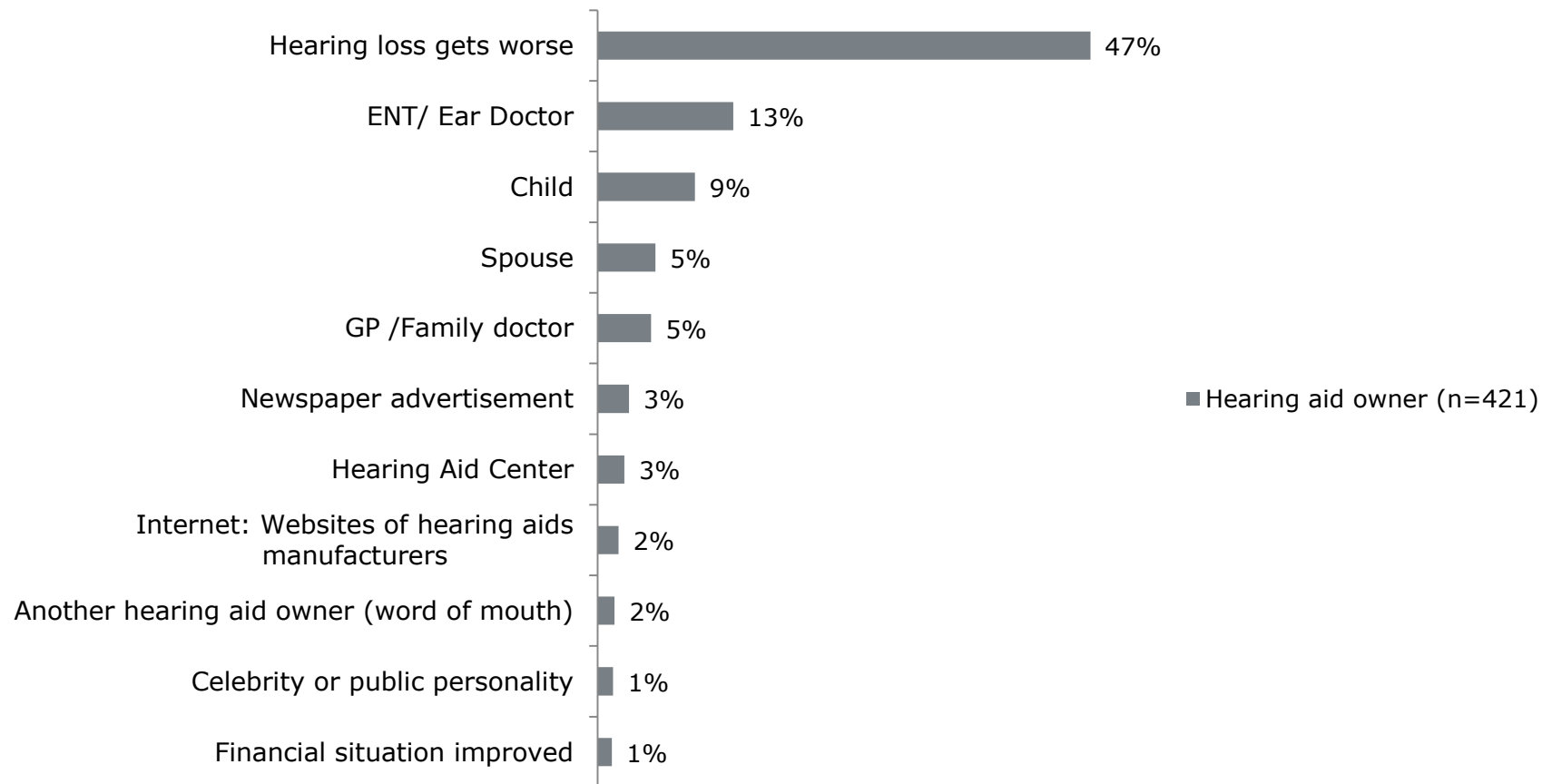
**Non-owner:** Think about the option to obtain / purchase a hearing aid. What do you think would influence you to obtain / purchase a hearing aid ?

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



# The most important trigger to buy a hearing aid is worsening hearing loss

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







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# APPENDIX

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

Profiles: Categories add to 100%\*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Gender</b>						
Male	6'644	10.6%	13.1%	48.9%	46.0%	41.1%
Female	7'066	12.0%	15.5%	51.1%	54.0%	58.9%
<b>Age recoded</b>						
1 - 14	1'743	0.6%	60.8%	14.3%	0.3%	2.6%
15 - 24	1'320	3.6%	8.7%	10.5%	3.2%	1.8%
25 - 34	1'426	2.8%	21.1%	11.4%	2.4%	3.8%
35 - 44	1'798	3.8%	7.2%	14.2%	4.8%	2.2%
45 - 54	1'887	7.0%	6.5%	14.4%	9.2%	3.8%
55 - 64	1'646	8.9%	3.7%	12.3%	10.6%	2.4%
65 - 74	1'913	17.6%	8.0%	13.0%	23.2%	12.0%
74+	1'977	39.2%	20.6%	9.9%	46.2%	71.3%
<b>Type of household</b>						
single household	1'267	15.2%	14.6%	8.8%	12.4%	12.6%
Couple, no kids	2'832	14.4%	13.5%	19.9%	26.5%	24.7%
Couple with kid(s)	5'062	5.8%	12.2%	39.2%	19.3%	15.9%
Single mom/dad with kid(s)	2'299	13.7%	14.9%	16.3%	20.2%	21.0%
Couple with kid(s) and/or grandchildren	323	12.7%	24.6%	2.3%	2.3%	4.5%
Single grandfather/mother with kid(s) and /or grandchildren	49	9.5%	0.0%	0.4%	0.4%	0.0%
Retirement home, hospital etc.	432	27.0%	20.1%	2.6%	7.0%	10.4%
Other	1'447	12.7%	13.2%	10.4%	12.0%	10.8%

# Demographics (2) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%\*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Status</b>						
The head of the household	5'348	16.8%	14.8%	36.6%	57.4%	59.5%
The spouse of the head of the household	3'214	10.6%	10.8%	23.6%	22.8%	16.5%
Daughter/son of head of household	4'083	2.0%	12.3%	32.9%	5.3%	4.4%
Parent of the head of the household	631	31.9%	19.7%	3.5%	12.1%	17.7%
Other person	431	8.3%	12.1%	3.3%	2.4%	1.9%
<b>Employment</b>						
Full time employed	4'408	6.3%	7.4%	40.0%	19.2%	9.4%
Part time employed	1'737	8.0%	7.4%	15.5%	9.7%	4.8%
Unemployed / not working	2'227	13.4%	13.7%	18.6%	19.4%	18.8%
Retired under a disability pension scheme (fully or partly)	2'143	31.6%	19.7%	14.2%	40.9%	61.2%
Early retired under an early retirement benefit scheme	84	14.4%	0.0%	0.7%	0.9%	0.0%
Retired (at the official retirement age)	553	21.6%	9.6%	4.2%	8.1%	5.3%
Student / pupil / in training	731	3.1%	4.7%	6.9%	1.6%	0.5%
<b>Education</b>						
a middle school	991	28.8%	18.0%	6.8%	17.7%	23.6%
a high school	3'899	13.2%	15.0%	32.8%	32.9%	35.2%
a vocational ( technical ) school	1'067	10.4%	14.5%	9.2%	7.2%	7.4%
a junior college	936	10.0%	11.9%	8.1%	6.2%	5.1%
a university	3'432	9.1%	8.1%	30.2%	21.5%	11.6%
a graduate school	350	8.3%	13.4%	3.1%	1.9%	1.8%
Other	296	29.8%	16.0%	2.0%	5.6%	6.5%
Prefer not to say	913	12.4%	17.0%	7.7%	7.1%	8.8%

# Sample size and random sample error: Rules of thumb

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

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