

## Results

# IndiaTrak 2018 – Part I

1. Introduction
2. Market overview
3. Appendix

### **Disclaimer:**

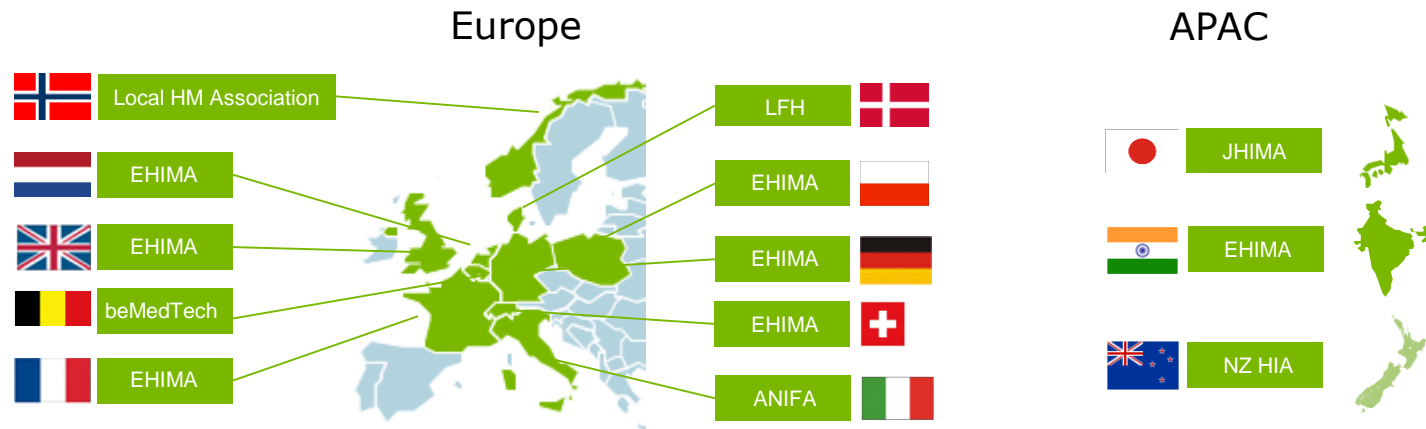
Census data of India was applied to ensure a representative age and gender distribution within the sample, but only a part of the Indian population can be reached with online-surveys such as EuroTrak. Consequently, the figures presented do not stand for the entire population, as the higher socio-economic classes are over-represented in the sample. The new socio-economic classification («SEC») for India was applied, which is based on the education of the chief income earner and the number of consumer durables in the household. The main part of the sample belongs to the high SEC segments A1, A2 or A3 (see page 6).



# Summary

## 1. Introduction

- IndiaTrak 2018 was designed and executed by Anovum (Zurich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).
- Sample size India 2018:
  - Representative sample: n=16'148 people
- IndiaTrak 2018 is part of the IndiaTrak studies:



# Summary

## 2. Market overview

---

- Stated hearing loss prevalence
  - Total: 5.8%, 18+: 7.3%
  - Hearing Tests: 30% had a hearing test in the last 5 years, most tests done by ear doctors and family doctors
- Hearing aid adoption rate (HA penetration)
  - Total: 66.4%
  - Total age group 18+: 62.9%
  - Only 24% of HA owners have binaural treatment.

---

# 1. Introduction

# Organisation of IndiaTrak 2018

---

## Organisation

- Principal of the project IndiaTrak is the European Hearing Instrument Manufacturers Association [EHIMA]. Members of EHIMA are: GN Resound as, William Demant Holding A/S, Sonova AG, Sivantos Pte. Ltd., STARKEY LABS and WIDEX AS [EHIMA Companies].
- Anovum Zurich developed the concept of IndiaTrak, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore Anovum analysed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire.

## 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 – IndiaTrak/2018/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.

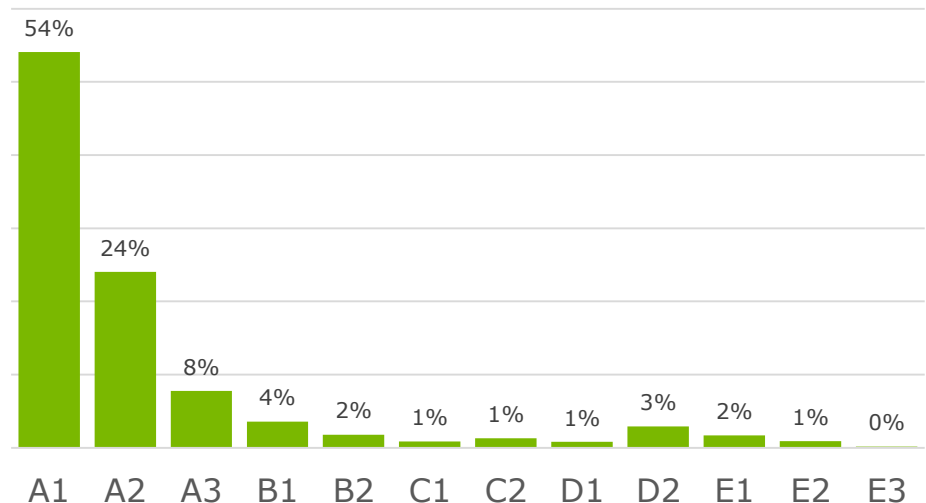
# Some comments about the sample in India

- Census data of India was applied to ensure a representative age and gender distribution within the sample.
- Only a part of the Indian population can be reached with online surveys as EuroTrak, due to lack of technology, literacy or language skills.
- Therefore it has to be considered when looking at the following figures, that they don't stand for the whole population of India, as the higher socio-economic classes of India are over-represented in the sample.
- We applied the new socio-economic classification («SEC») for India, which is based on the education of the chief income earner and the number of consumer durables in the household. The main part of the sample belongs to the high SEC segments A1, A2 or A3 (see below).

## SEC classification

No. of Durables (TRANSFER FROM Q1)	Chief Earner: Education (Q2)						
	Illiterate	Literate but no formal schooling/ School. Upto 4 years	School- 5 to 9 years	SSC/ HSC	Some College (incl a Diploma) but not Grad	Graduate/ Post Graduate: General	Graduate/ Post Graduate: Professional
	1	2	3	4	5	6	7
None	E3	E2	E2	E2	E2	E1	D2
1	E2	E1	E1	E1	D2	D2	D2
2	E1	E1	D2	D2	D1	D1	D1
3	D2	D2	D1	D1	C2	C2	C2
4	D1	C2	C2	C1	C1	B2	B2
5	C2	C1	C1	B2	B1	B1	B1
6	C1	B2	B2	B1	A3	A3	A3
7	C1	B1	B1	A3	A3	A2	A2
8	B1	A3	A3	A3	A2	A2	A2
9+	B1	A3	A3	A2	A2	A1	A1

## SEC distribution in the sample



---

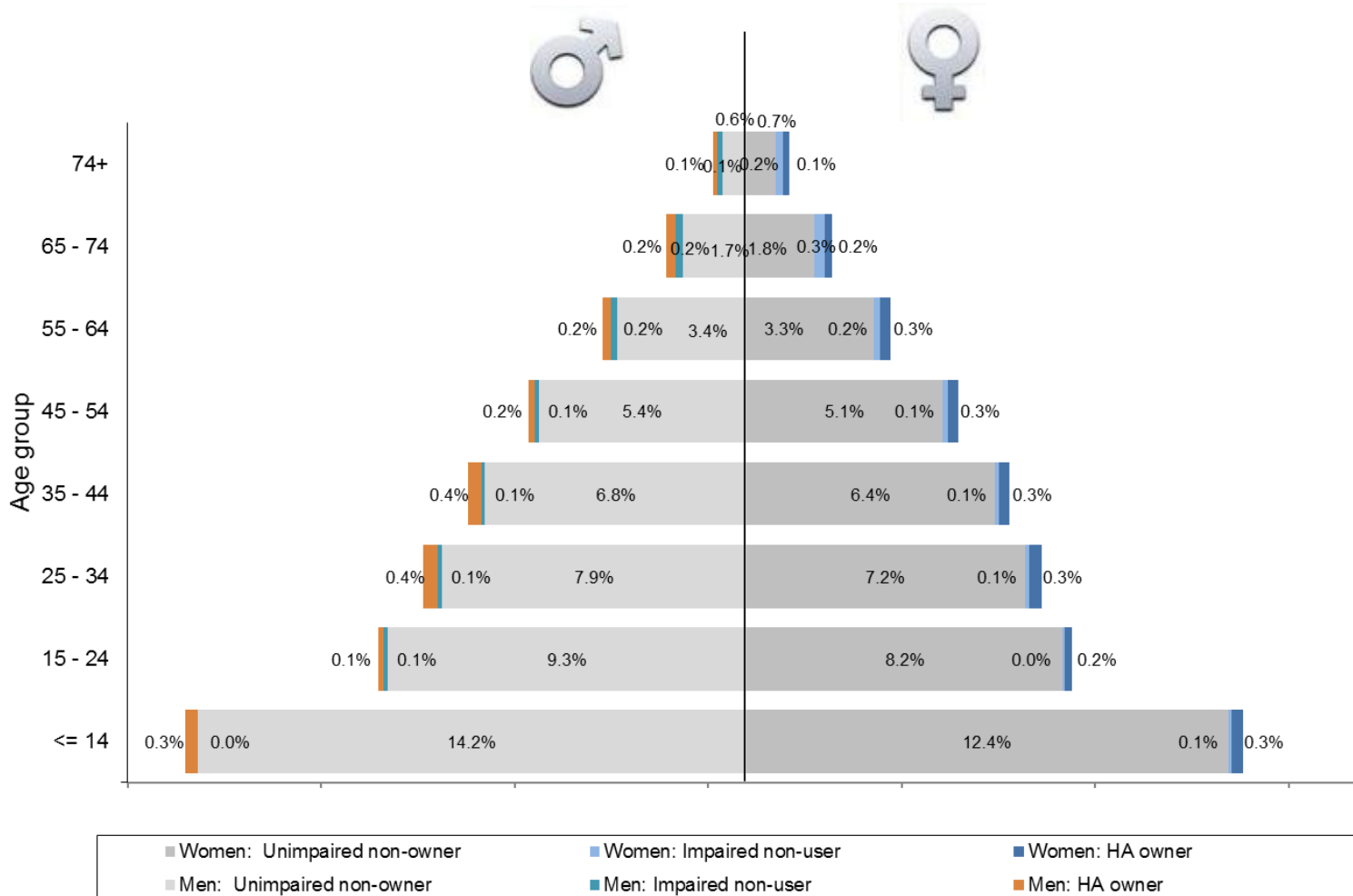
## 2. Market overview

---

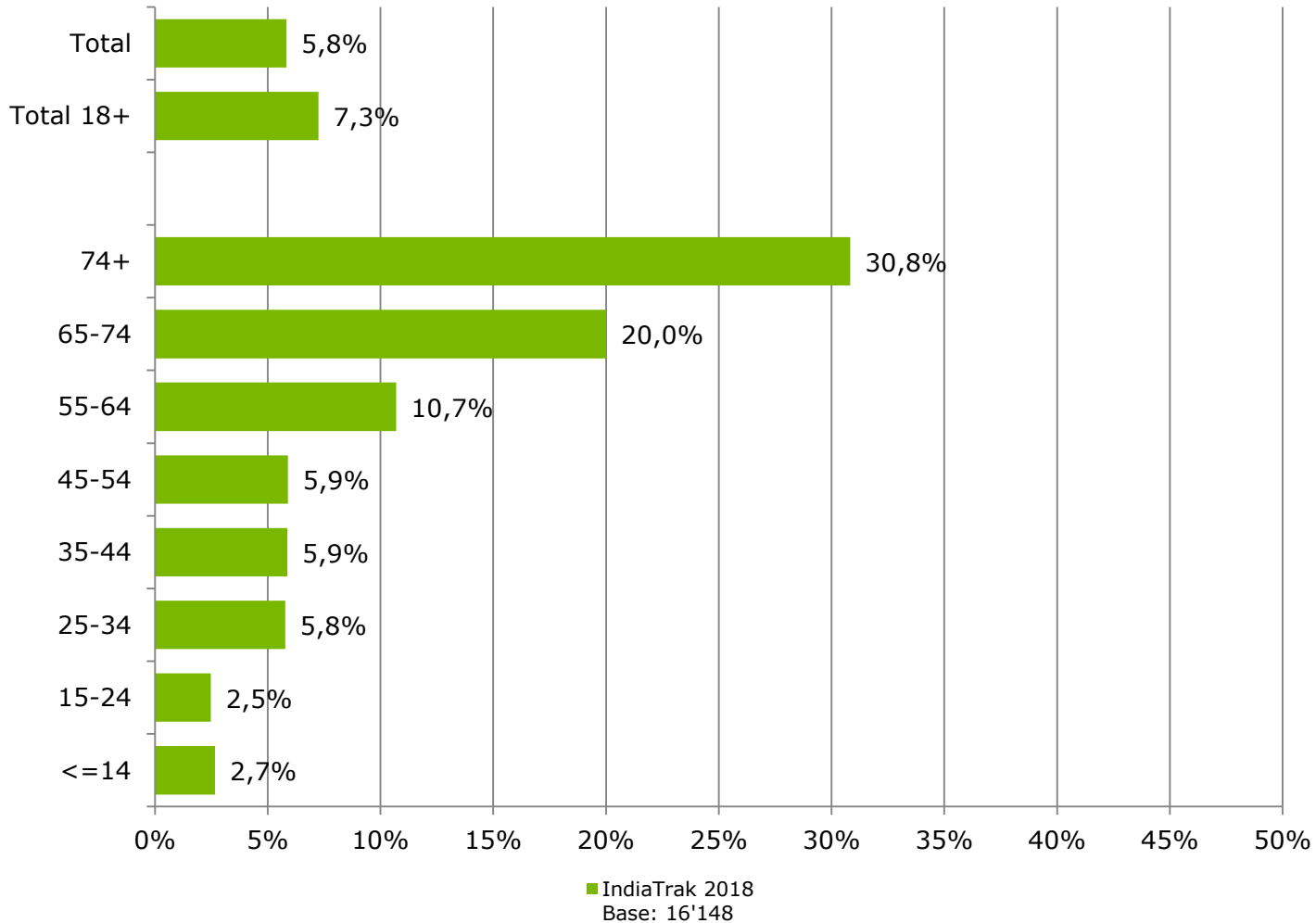
# Prevalence of hearing loss and adoption rate



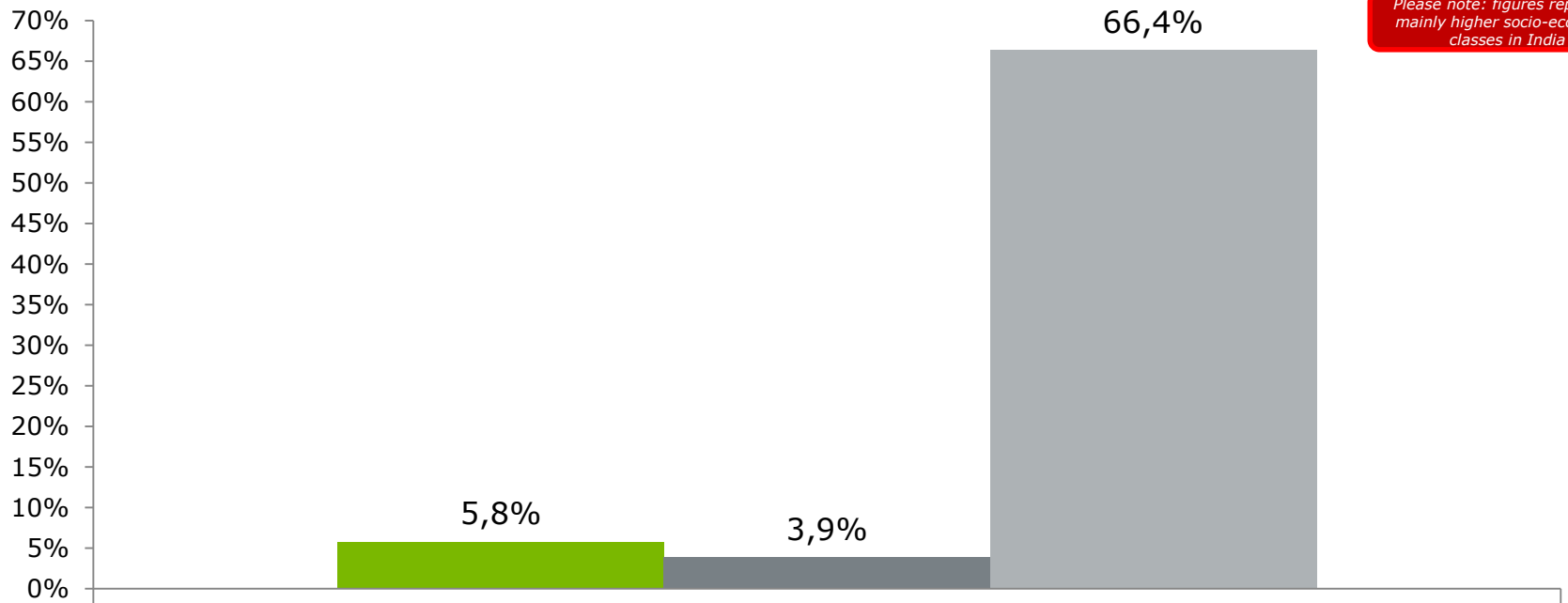
# Hearing loss and hearing instrument ownership by gender/age



# Hearing loss prevalence India



# Overview hearing loss prevalence and hearing aid adoption



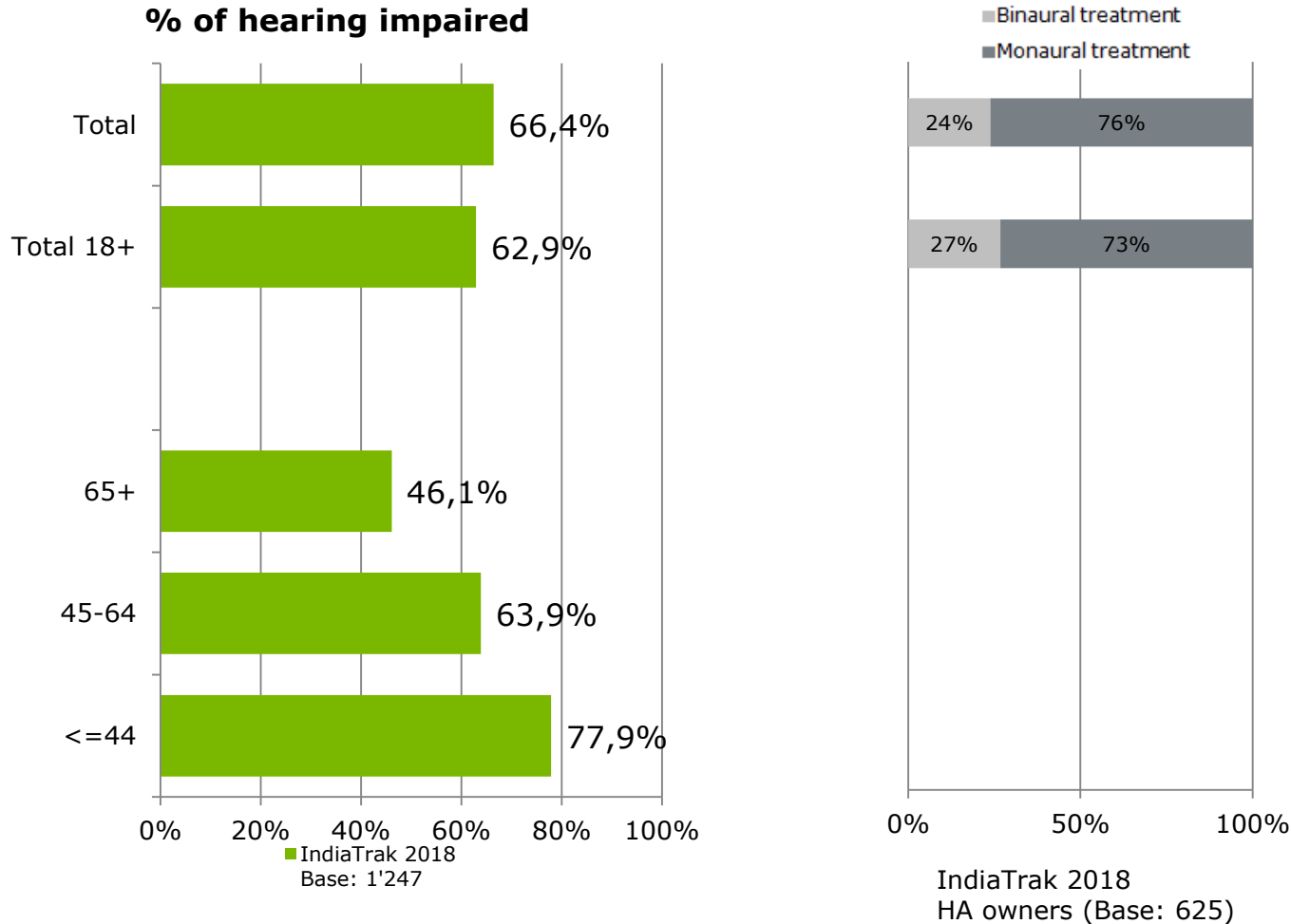
*Please note: figures represent mainly higher socio-economic classes in India*

IndiaTrak 2018

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



# Hearing aid adoption rate India: 66% of hearing impaired have hearing aid(s), 24% of them have binaural treatment



Please note: figures represent mainly higher socio-economic classes in India



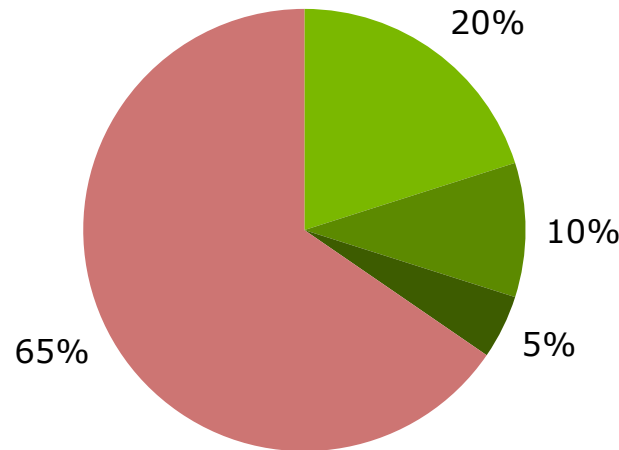
---

# Hearing tests and where hearing is tested

# Hearing Tests: 65% never had a hearing test, 30% in the last 5 years - most tests done by ear doctors and family doctors

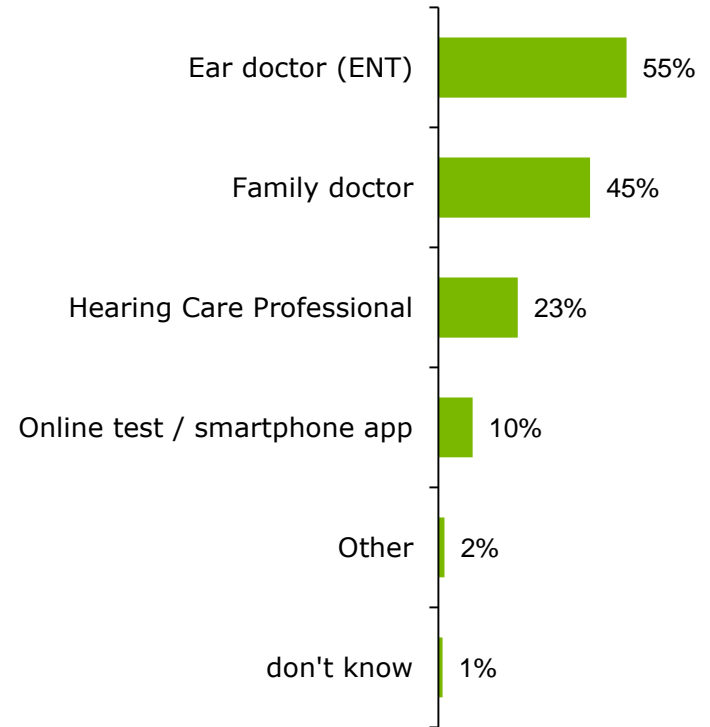
Have you ever taken a hearing test?

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



Base=15'059

Where/how was your hearing tested?



Base= 4'503





**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

[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

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



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



# APPENDIX

---



# 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>							
	<b>Male</b>	8'382	5.4%	69.3%	52.2%	43.7%	49.9%
	<b>Female</b>	7'766	6.3%	63.8%	47.8%	56.3%	50.1%
<b>Age recoded</b>							
	<b>1 - 14</b>	4'415	2.7%	87.4%	28.3%	4.7%	16.5%
	<b>15 - 24</b>	2'890	2.5%	70.3%	18.5%	6.7%	8.1%
	<b>25 - 34</b>	2'581	5.8%	75.4%	16.0%	11.6%	18.0%
	<b>35 - 44</b>	2'260	5.9%	76.3%	14.0%	9.9%	16.2%
	<b>45 - 54</b>	1'792	5.9%	67.5%	11.1%	10.9%	11.4%
	<b>55 - 64</b>	1'203	10.7%	60.9%	7.1%	15.9%	12.5%
	<b>65 - 74</b>	689	20.0%	47.2%	3.6%	23.1%	10.4%
	<b>74+</b>	317	30.8%	44.6%	1.4%	17.2%	7.0%
<b>Household size</b>							
	<b>1 person</b>	310	11.1%	85.8%	1.8%	1.5%	4.7%
	<b>2 persons</b>	839	14.6%	76.0%	4.7%	9.3%	14.9%
	<b>3 persons</b>	2'746	5.1%	53.6%	17.1%	20.6%	12.0%
	<b>4 persons</b>	6'026	4.9%	64.2%	37.7%	33.6%	30.4%
	<b>5+ persons</b>	6'226	5.6%	68.2%	38.7%	35.0%	37.9%



# 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>Inhabitants city</b>						
Village / Rural Area	1'320	6.1%	69.9%	8.2%	7.7%	9.0%
Town	4'181	4.8%	69.6%	26.4%	19.5%	22.6%
Mini-Metro	1'957	5.2%	64.7%	12.3%	11.3%	10.5%
Metro	8'573	6.5%	65.0%	53.1%	61.6%	57.9%
<b>Employment</b>						
Full time employed	4'891	6.7%	77.6%	42.4%	24.3%	49.3%
Part time employed	905	6.0%	61.1%	7.9%	7.1%	6.5%
Unemployed / not working	592	6.7%	55.6%	5.1%	5.9%	4.3%
Home maker/ House wife	2'013	8.6%	49.4%	17.1%	29.2%	16.7%
Retired	853	20.7%	56.4%	6.3%	25.5%	19.3%
Business Owner/ Proprietor	698	3.6%	40.3%	6.3%	5.0%	2.0%
Student	1'628	1.2%	53.7%	14.9%	3.0%	2.1%
<b>Education</b>						
Illiterate (No formal Education)	219	11.2%	52.2%	1.8%	3.9%	2.5%
Basic Schooling (4thGrade)	212	13.1%	40.7%	1.7%	5.5%	2.2%
5th Grade to 9th Grade	382	8.6%	45.8%	3.2%	5.9%	2.9%
SSC/ HSC (10th Grade to 12th Grade)	1'914	6.0%	52.6%	16.7%	18.0%	11.6%
Some College but not Graduate (Diploma/ITI etc.)	956	6.9%	55.8%	8.3%	9.7%	7.2%
Graduate –General (B.A, B. Sc etc.)	3'101	7.2%	60.3%	26.7%	29.4%	26.1%
Graduate –Professional (B.E, B. Tech, M.B.B.S etc.)	1'843	5.4%	74.3%	16.2%	8.6%	14.5%
Post Graduate –General (M.A, M. Sc etc.)	1'683	8.7%	77.1%	14.3%	11.1%	21.9%
Post Graduate –Professional (M.E, M. Tech, M.B.A etc.)	1'270	6.4%	70.3%	11.0%	8.0%	11.0%

