Results

EuroTrak Germany 2015

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

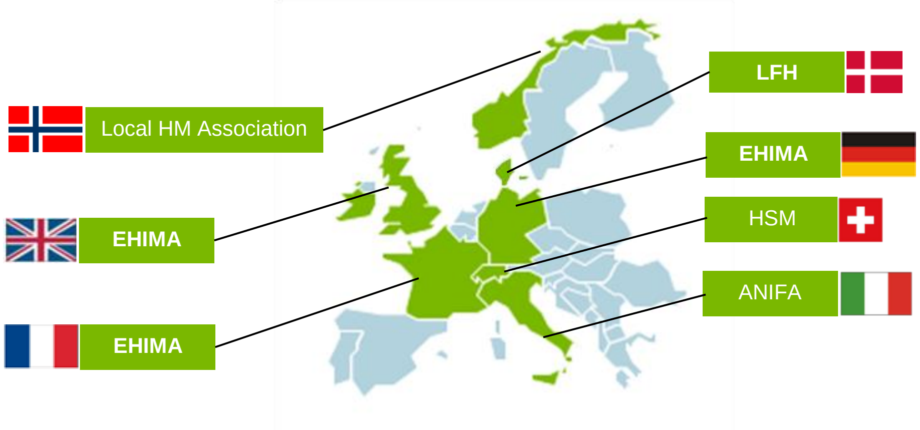
Research to create value

Summary
1. Introduction

- EuroTrak Germany 2015 was designed and executed by Anovum (Zurich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).

- Sample sizes Germany 2015:
  - Representative sample (sample 1): n=13'775 people
  - Hearing impaired (sample 2): n=1'304 people
    - Hearing impaired non-owners: n= 799 people with hearing loss (**HL**)
    - HA owners: n= 505 people with hearing aid (**HA**)

- EuroTrak Germany 2015 is part of the EuroTrak studies:



Summary
2. Market overview

- Stated hearing loss prevalence
  - Total: 12.1%, 18+: 13.9% (2012: 12.5%, 18+: 14.3%).
  - Binaural hearing loss: HA owners: 81%, HA non-owners: 63%.
  - Hearing Tests: 45% (2012: 47%) had a hearing test in the last 5 years, most tests done by ENTs

- Hearing aid adoption rate (HA penetration)
  - Total: 34.9% (2012: 34.0%).
  - Total age group 18+: 35.0% (2012: 34.1%).
  - 75% of HA owners have binaural treatment.

- The route to the hearing aid
  - 79% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 50% got hearing aids recommended from the ENT or family doctor (drop out rate=36% / 2012: 40%).
  - 67% (2012:73%) of the GP consultations referred to an ENT. 12% (2012: 11%) recommended no action.
  - 35% of ENT consultations referred to a audiologist, 39% (2012: 44%) recommended no action.

- Potential social cost-savings due to the use of hearing aids
  - Hearing aids are believed to have a positive impact on the job.
  - Hearing aid owners have a lower risk of being depressed.
  - Quality of sleep seems to improve if hearing impaired use hearing aids.

Summary
3. Analysis of hearing aid owners

- Hearing aid ownership and usage, accessories and Telecoil
  - 92% (2012: 93%) of all HA owners asked some kind of 3rd party reimbursement.
  - 45% of the currently owned HAs were bought in the last two years (EuroTrak 2012: 49%)
  - The average age of the currently owned HAs is 2.9 years (2012: 3.0 years).
  - The median age of hearing aids before replacement is 5 years.
  - On average, HAs are worn 8.7 hours a day (2012: 8.0).
  - 38% of today's hearing aid owners are aware of their hearing aid brand, 38% would preferably choose the same brand if they would plan to obtain new hearing aids (52% are indifferent).
  - The ownership of accessories is very low in Germany.
  - 10% of hearing aid owners know what Telecoil is but only 5% have used it – mainly at home. More than half of of those who use it are satisfied.
- Importance of listening situations and satisfaction with HAs
  - 87% of the hearing aid owners say their hearing aid works better than or as expected
  - 77% (2012:77%) of the HA owners are satisfied with their HAs.
  - The more hours worn per day, the higher the satisfaction.
  - Satisfaction with newer hearing aids is higher than with older hearing aids.
  - Talking at home with family members, conversations with 1 person and talking on a phone are the most frequent important listening situations.
- Positive impact of HAs
  - Significant positive impact of HAs on different aspects – especially communication, participation in group activities and sense of safety.
  - 98% 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

- Reasons not to own/use HAs
  - Only 39% (2012: 33%) of the hearing impaired without hearing aids think that a third party would pay any part of hearing aids.
  - The main reasons for not using hearing aids are that people say "they hear well enough", "hearing loss is not severe enough" and that they are uncomfortable.
  - 3% who own HAs don't use them at all (0 hour); 10% use them less than one hour/day (0-1 hour).

- Social rejection, buying intentions and triggers to buy
  - 89% 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 aid.
  - The most important trigger to buy a hearing aid is worsening hearing loss and the ENT followed by "Akustiker" and spouse. Insurance coverage/price of hearing aids is much more relevant for the non owners.
  - 19% (2012: 13%) of non-owners intend to get a hearing aid within the next year.

Results

EuroTrak Germany 2015

Creative Market Research

Detailed Results: Roadmap

New topics for EuroTrak 2015 are highlighted in red

1. **Introduction**
   - Organisation of EuroTrak 2015
   - Recruitment process: In search of hearing impaired people
2. **Market overview**
   - Prevalence of hearing loss and hearing aid adoption rate
   - Hearing tests and **where hearing is tested**
   - The route to the hearing aid: **Sources of information** and drop-out rates
   - Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, **sleep quality**
3. **Analysis of hearing aid owners**
   - Hearing aid ownership, **awareness of hearing loss before getting hearing aids**, lifetime of hearing aids and usage
   - **Awareness and usage of accessories and Telecoil**
   - Satisfaction with hearing aids and drivers
   - **Importance of listening situations**
   - Positive impact of 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**
   - Buying intentions and **most important triggers to buy**
5. **Appendix**
   - Demographics: Hearing instrument adoption rates and populations

1. Introduction

Organisation of EuroTrak 2015

Organisation

- Principal of the project EuroTrak is the European Hearing Instrument Manufacturers Association [EHIMA]. Members of EHIMA are: GN Resound, Oticon, Phonak, Sivantos, Starkey and Widex [EHIMA Companies].
- Anovum Zurich 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.
- 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 – EuroTrak – Germany/2015/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.

- EHIMA companies can order a report with satisfaction scores for their brand. The other brands will be shown as benchmarks without denomination (brand A, brand B etc.). The report will show all satisfaction values. It is not allowed to communicate any information from these reports outside the EHIMA company.

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 panelist pools of more than 40'000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=13'775** people based on census data.

Step 2: Target population interviews

Objective: Details about satisfaction with hearing aids and reasons for non-adoption

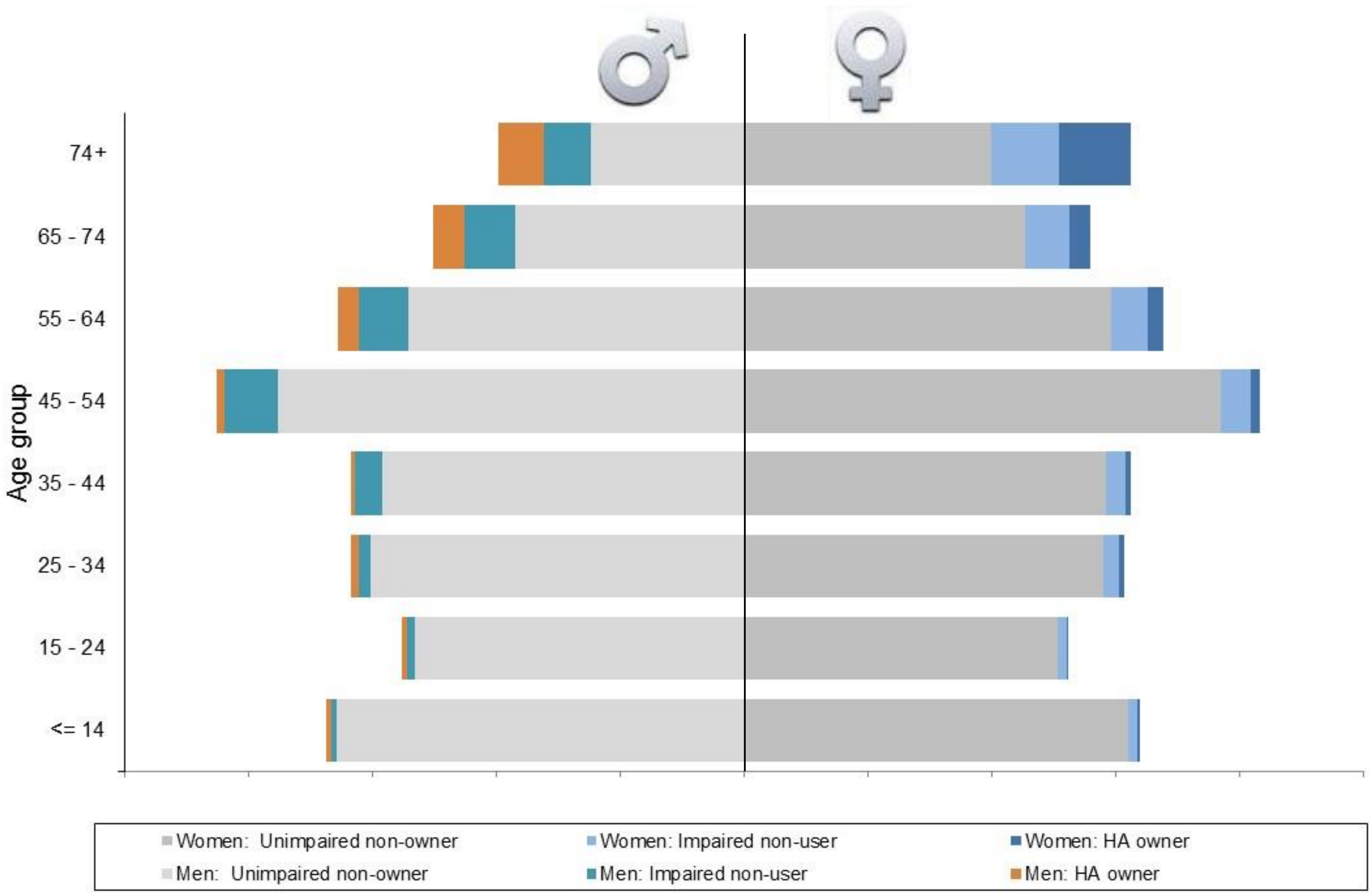
Process:

1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: **n=799** hearing aid owners and **n=505** hearing impaired non-owners

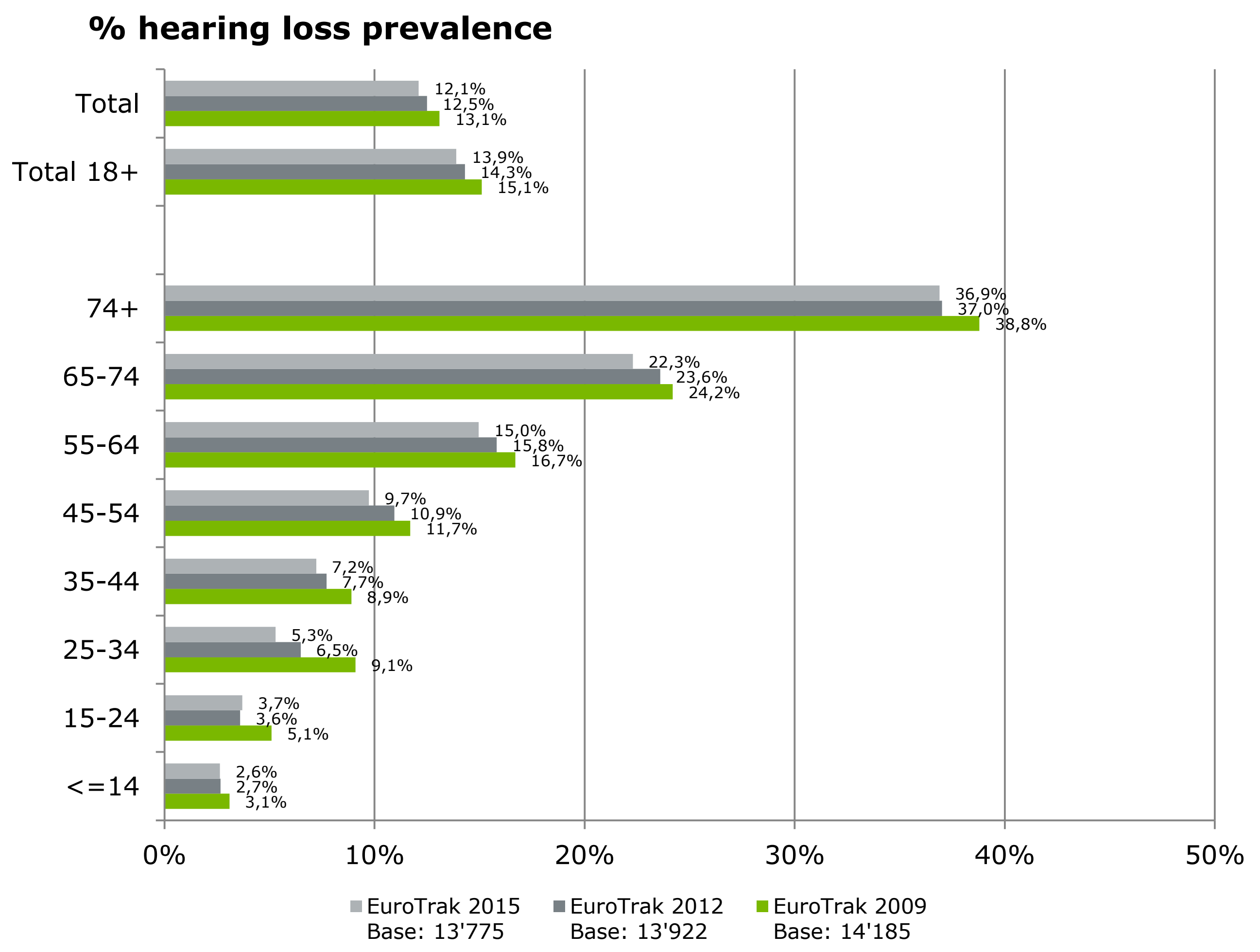
2. Market overview

Prevalence of hearing loss and adoption rate

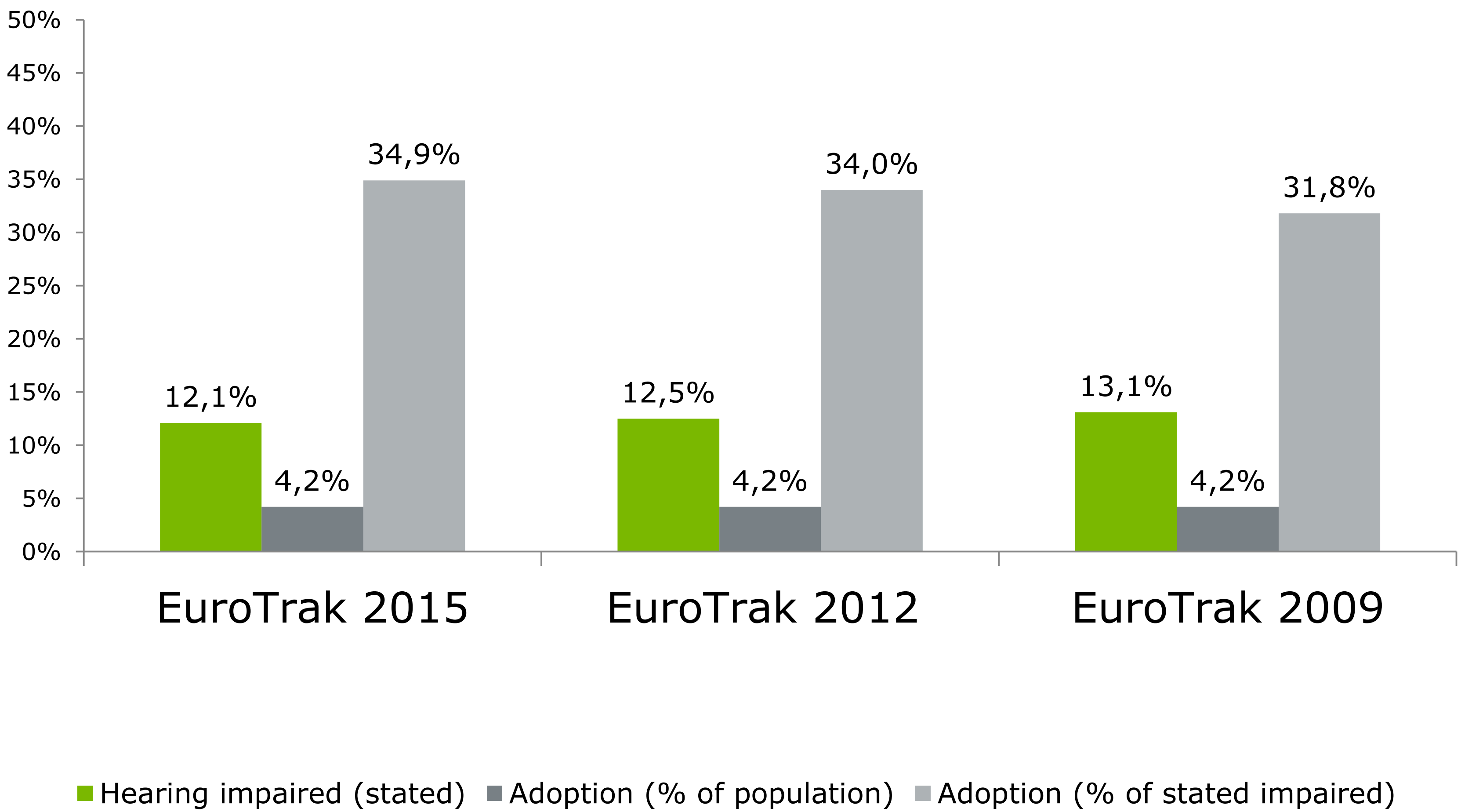
Hearing loss and hearing instrument ownership by gender/age



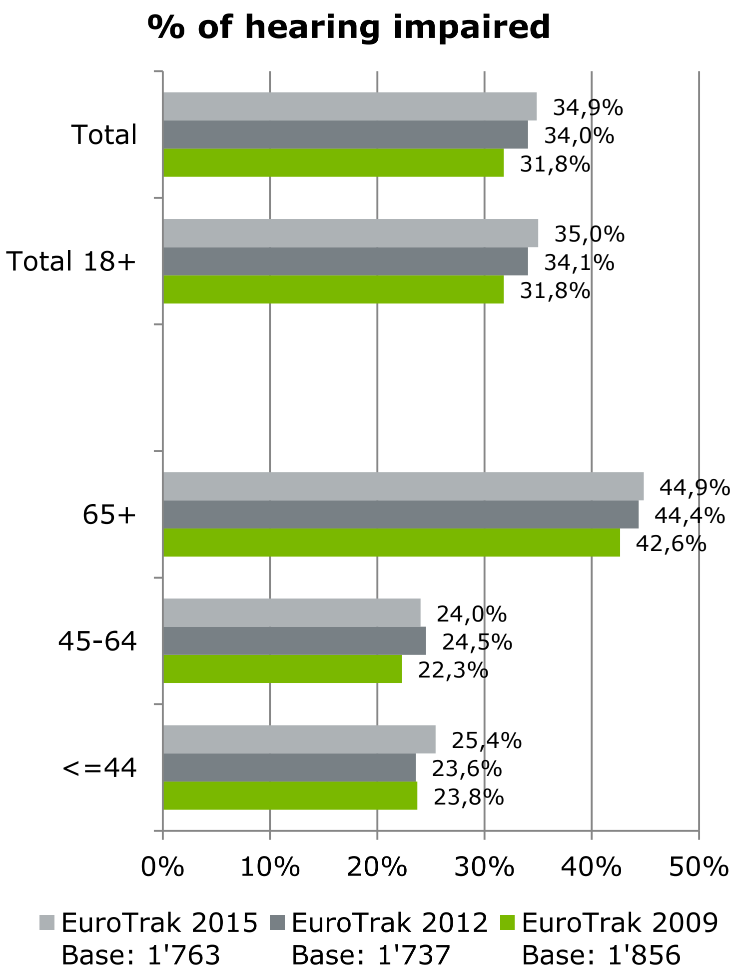
Hearing loss prevalence Germany

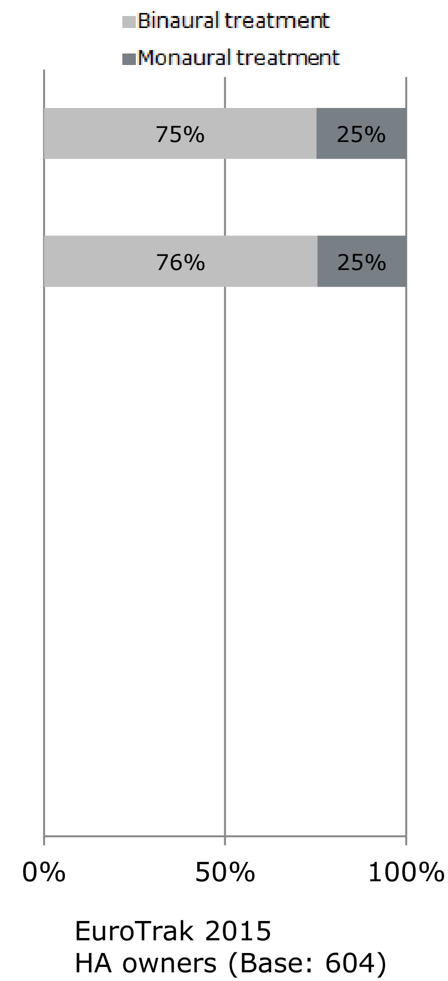


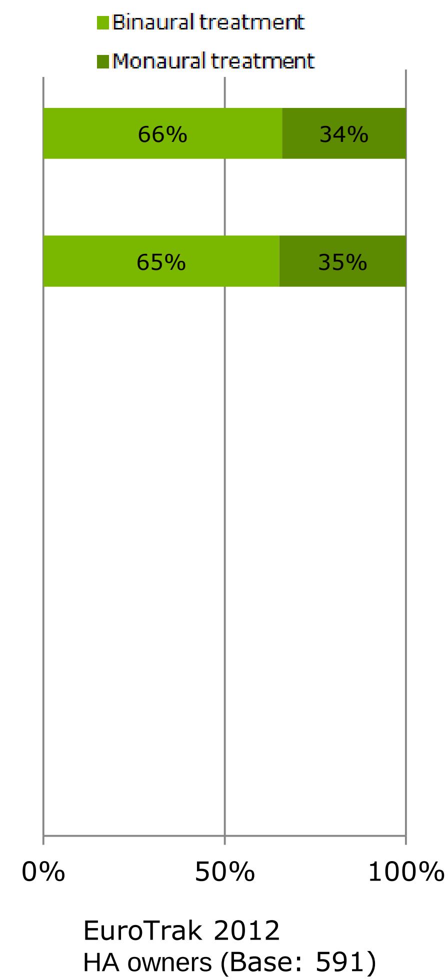
Overview hearing loss prevalence and hearing aid adoption



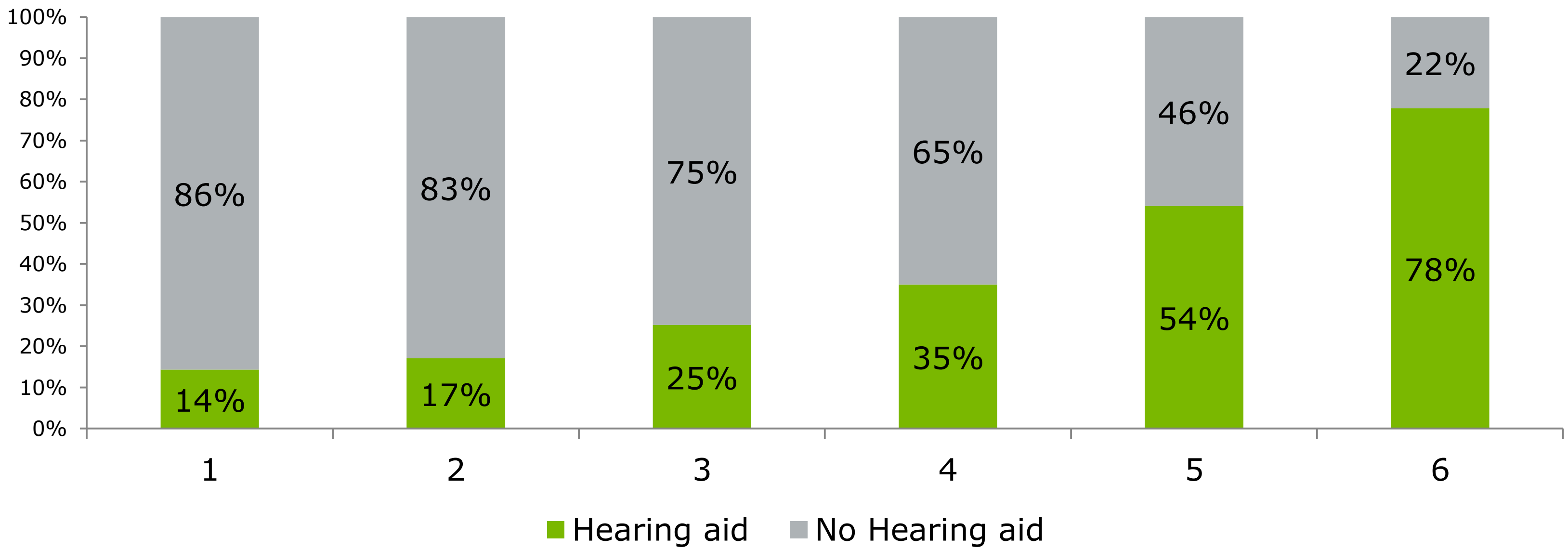
Hearing aid adoption rate Germany: 35% of hearing impaired have hearing aid(s), 75% of them have binaural treatment







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



Hearing loss 6-groups

HA-non-owner, n=799
HA-owner, n=505

* 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

	HA-Non-owner 2015: n=799 *(2012: n= 864/ 2009: n= 805)*	**HA Owner** 2015: n=505 *(2012: n= 500/ 2009: n= 503)*	**Hearing Aid Adoption (%)**
Ears impaired (stated)			
Unilateral loss	37% *(42%/43%)*	19% *(22%/25%)*	23% *(23%/22%)*
Bilateral loss	63% *(58%/57%)*	81% *(78%/75%)*	43% *(43%/39%)*
Perceived loss			
Mild+	49% *(42%/31%)*	10% *(10%/6%)*	10% *(11% /8%)*
Moderate+	43% *(43%/50%)*	54% *(45%/31%)*	41% *(36%/22%)*
Severe+	5% *(12%/15%)*	26% *(29%/43%)*	72% *(62%/62%)**
Profound+	2% *(3%/4%)*	10% *(16%/21%)*	

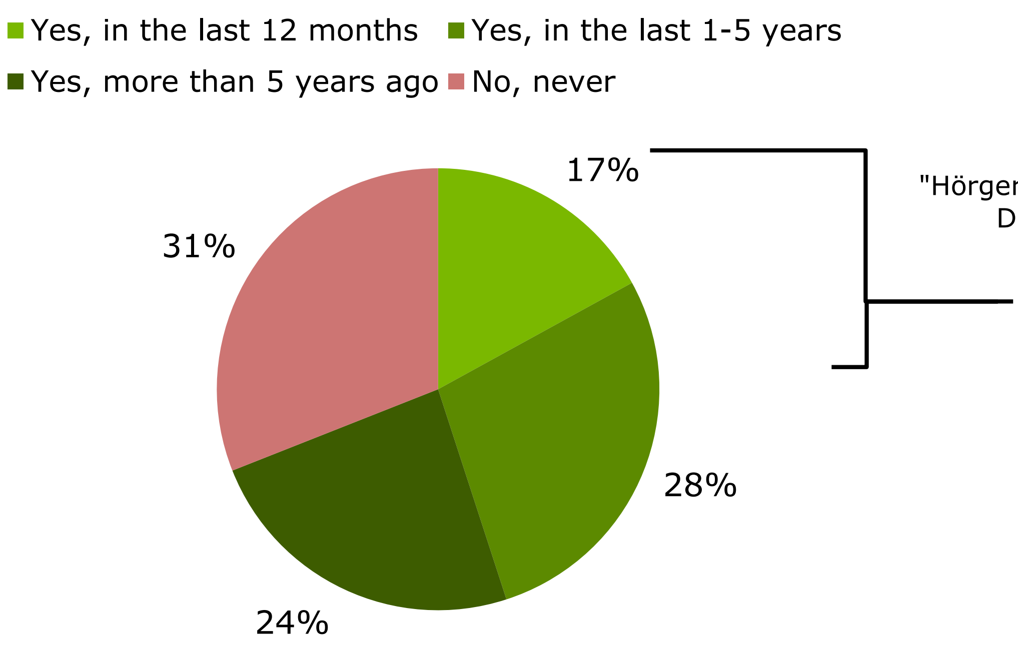
n's are unweighted whereas the shown results are weighted
* combined "severe" and "profound" because n is too small

+
2009: Schwach- Mässig-Stark-Sehr stark
2012/15: Leicht-Mittel-Schwer-Hochgradig

Hearing tests and where hearing is tested

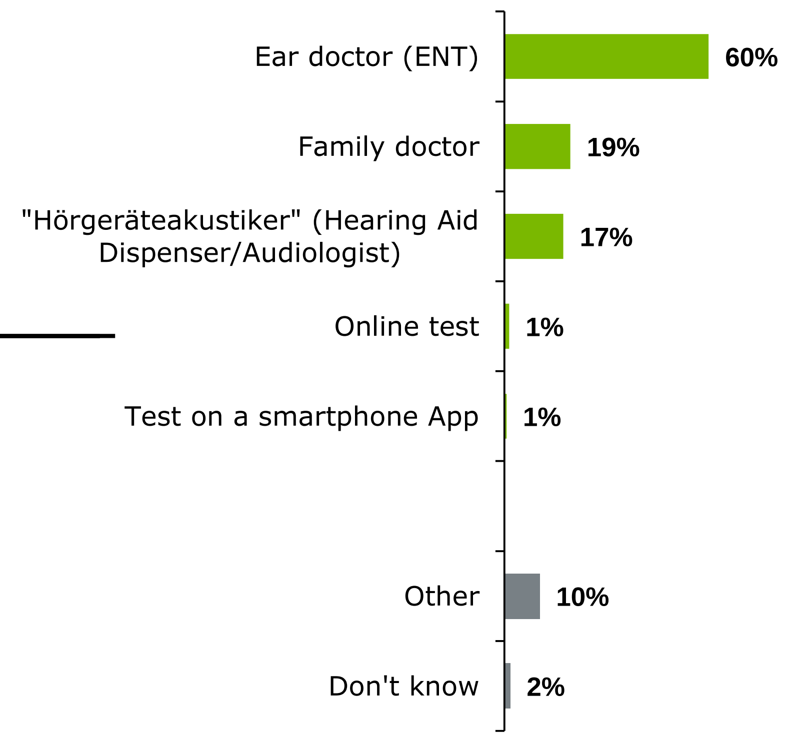
Hearing Tests: 45% (2012: 47%) had their hearing tested in the last 5 years – most tests are done by ENT's

Have you ever taken a hearing test?



Base=10'049

Where/how was your hearing tested?

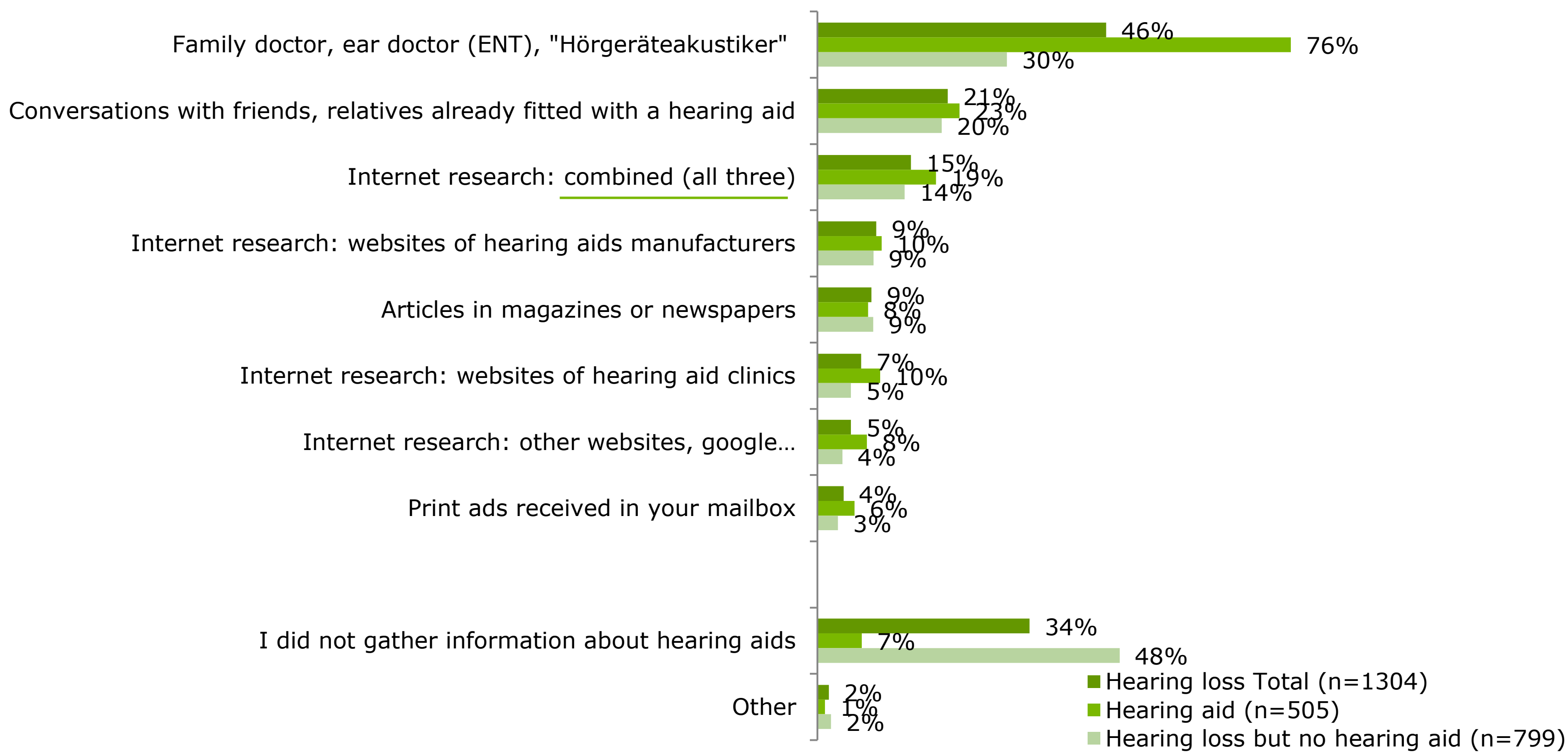


Base= 4'602

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

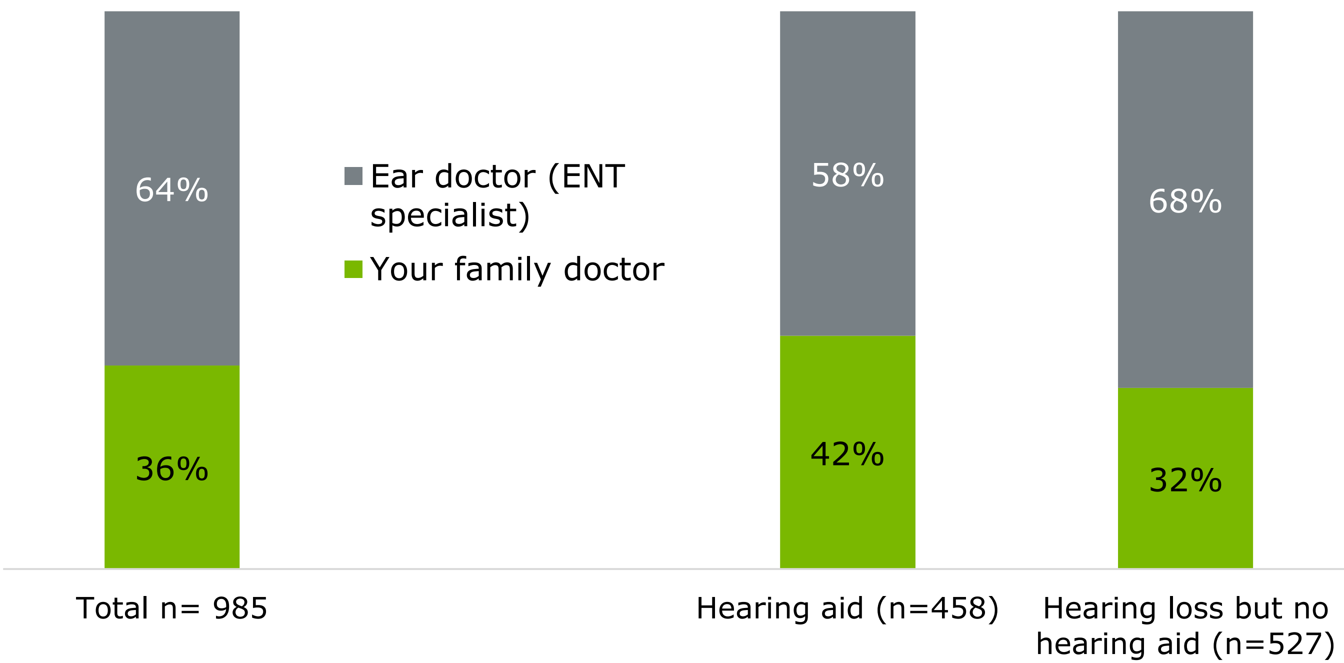
Doctors and “Hörgeräteakustiker” are the most important sources of information and therefore the major gatekeepers – followed by other people with hearing aids.

Where did you gather information about hearing aids?
Please check all that apply.

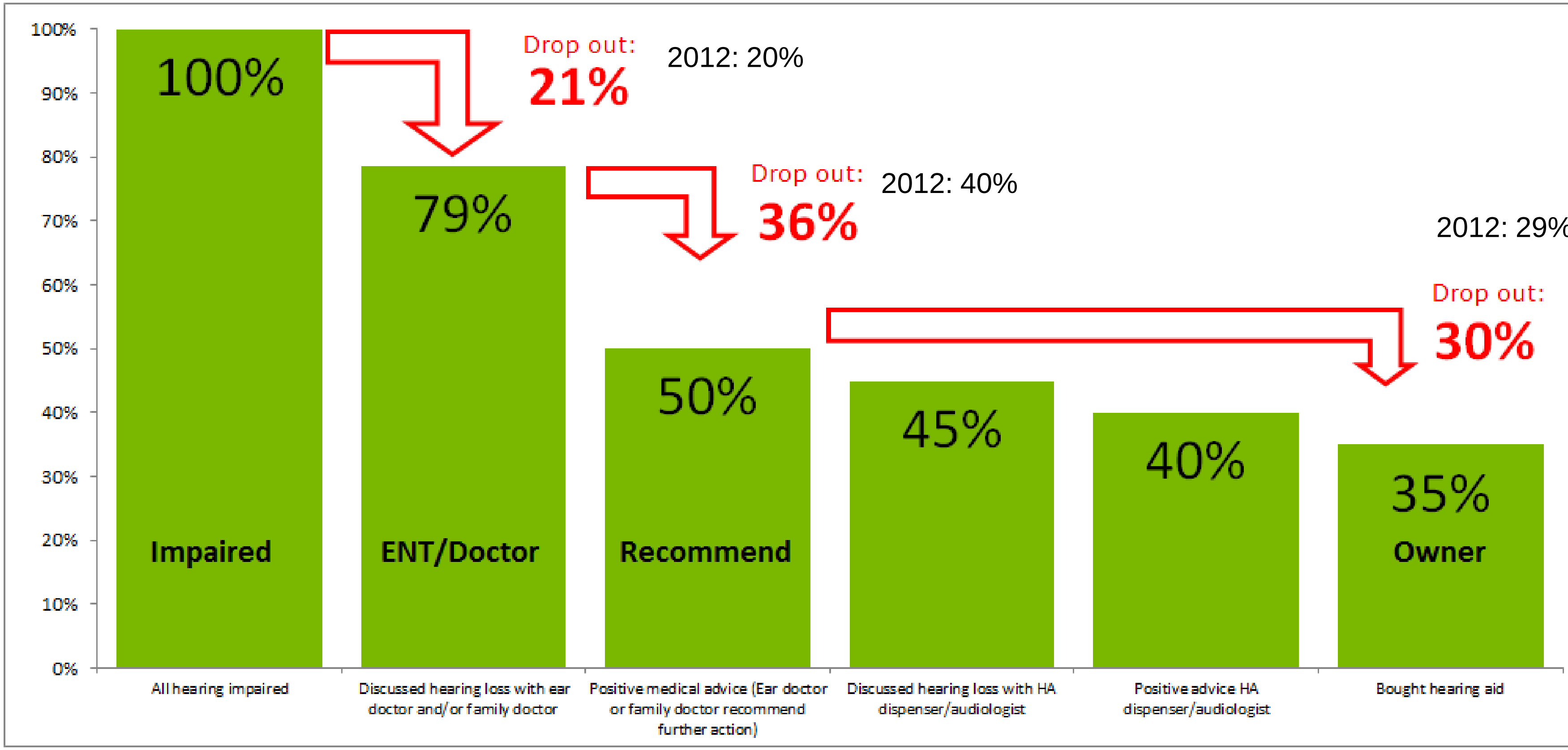


Of those who discussed the hearing loss with a doctor, about 2/3 talked to an ENT first and the other 1/3 talked to the family doctor first

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?



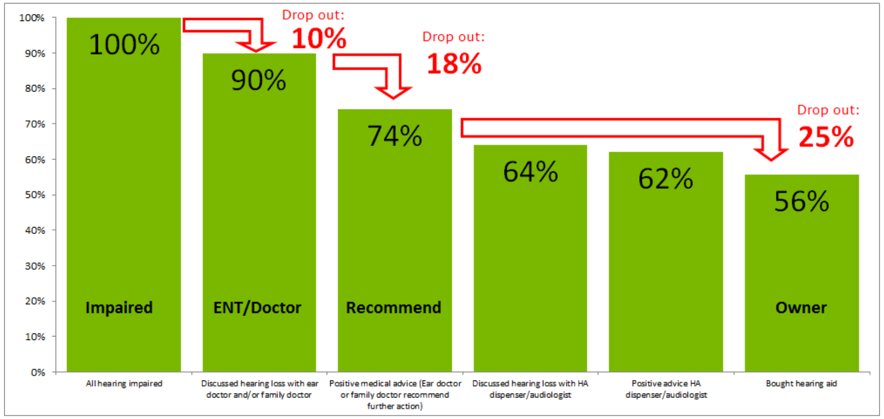
The route to the hearing aid: Compared to 2012 drop out 2 was reduced slightly



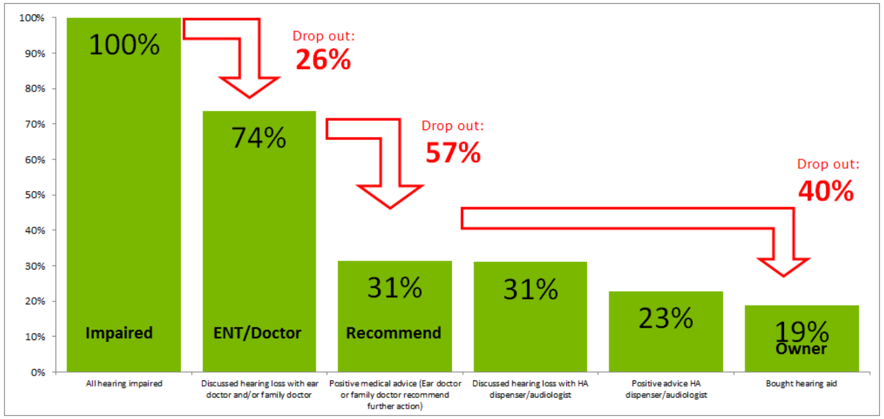
Base: n=1’304

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

Top 50% hearing loss*



Low 50% hearing loss*



Base: n=1‵304

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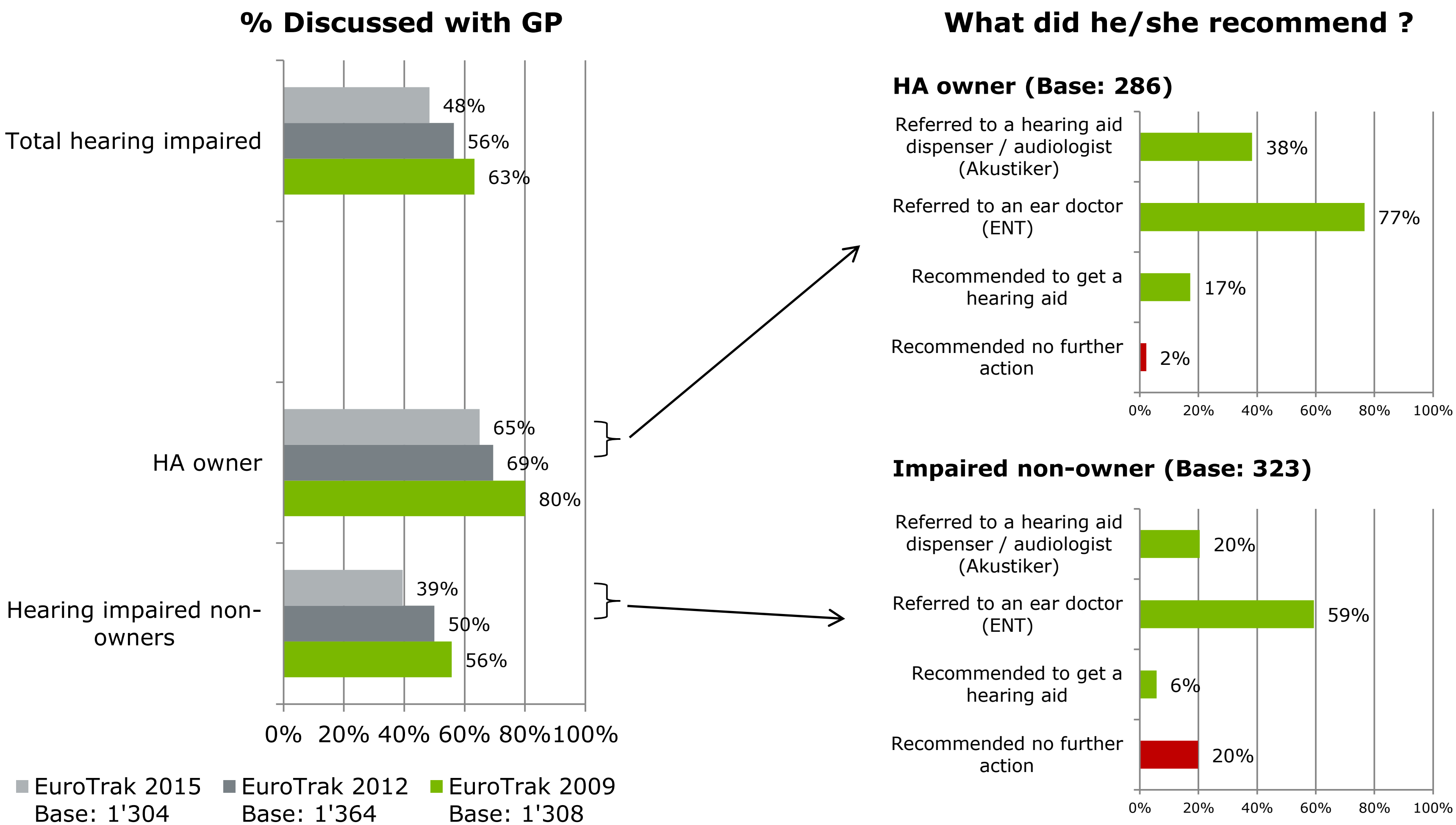
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ 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

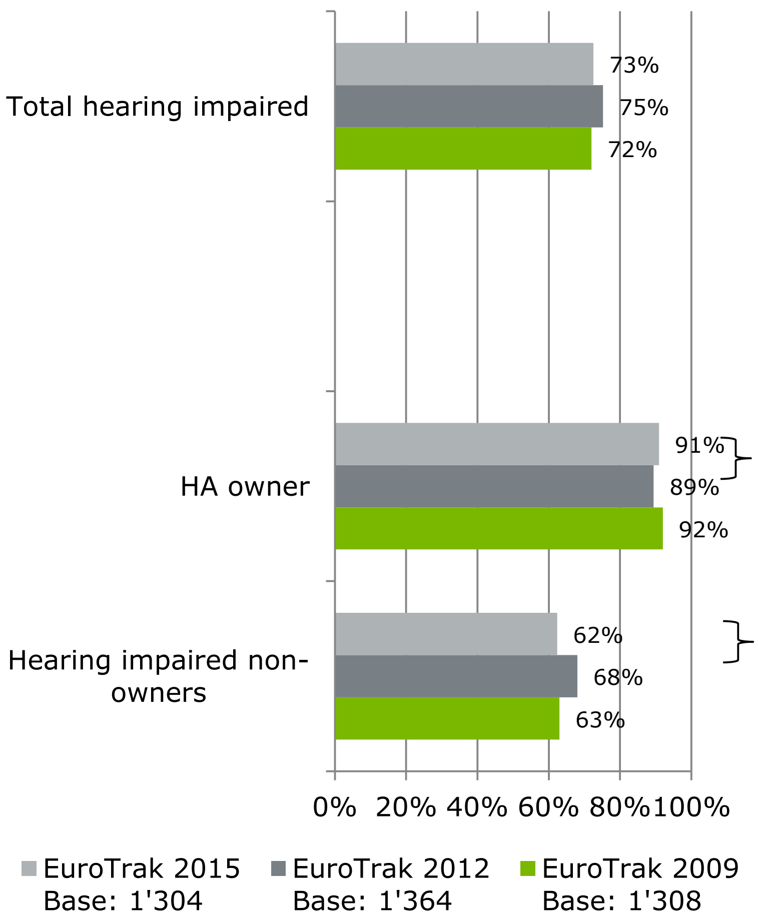
Have you discussed your hearing problem with your family doctor?



The route to the hearing aid: ENT

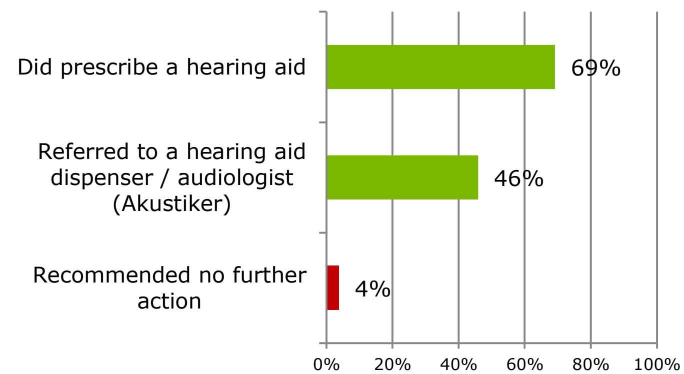
Have you discussed your hearing problem with an ear doctor (ENT)?

% Discussed with ENT

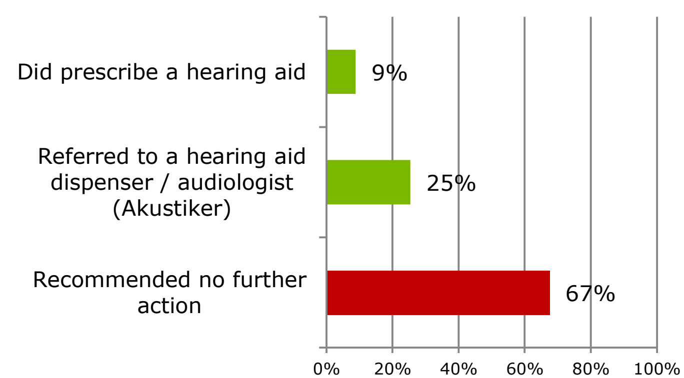


What did he/she recommend ?

HA owner (Base: 405)

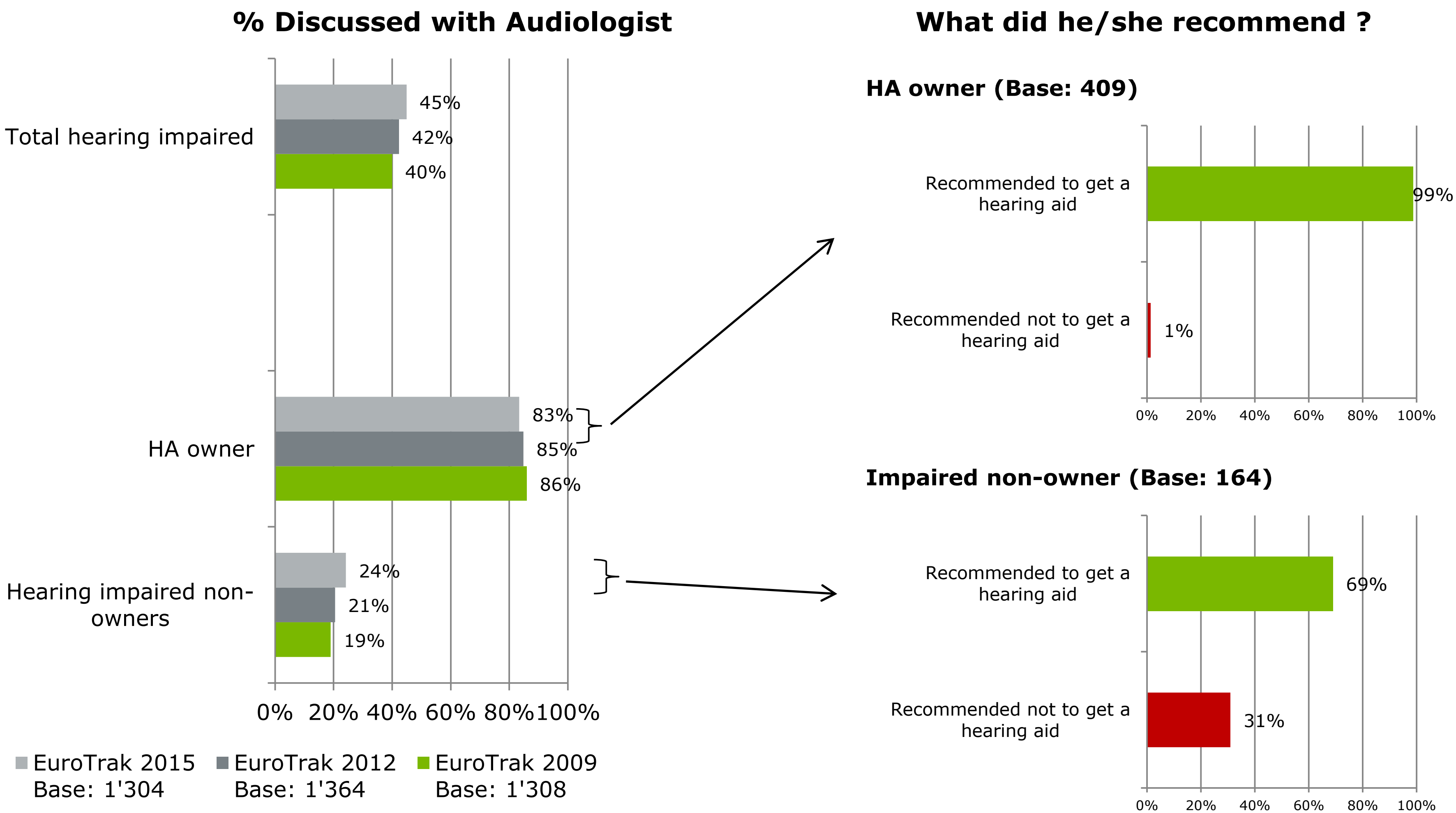


Impaired non-owner (Base: 506)

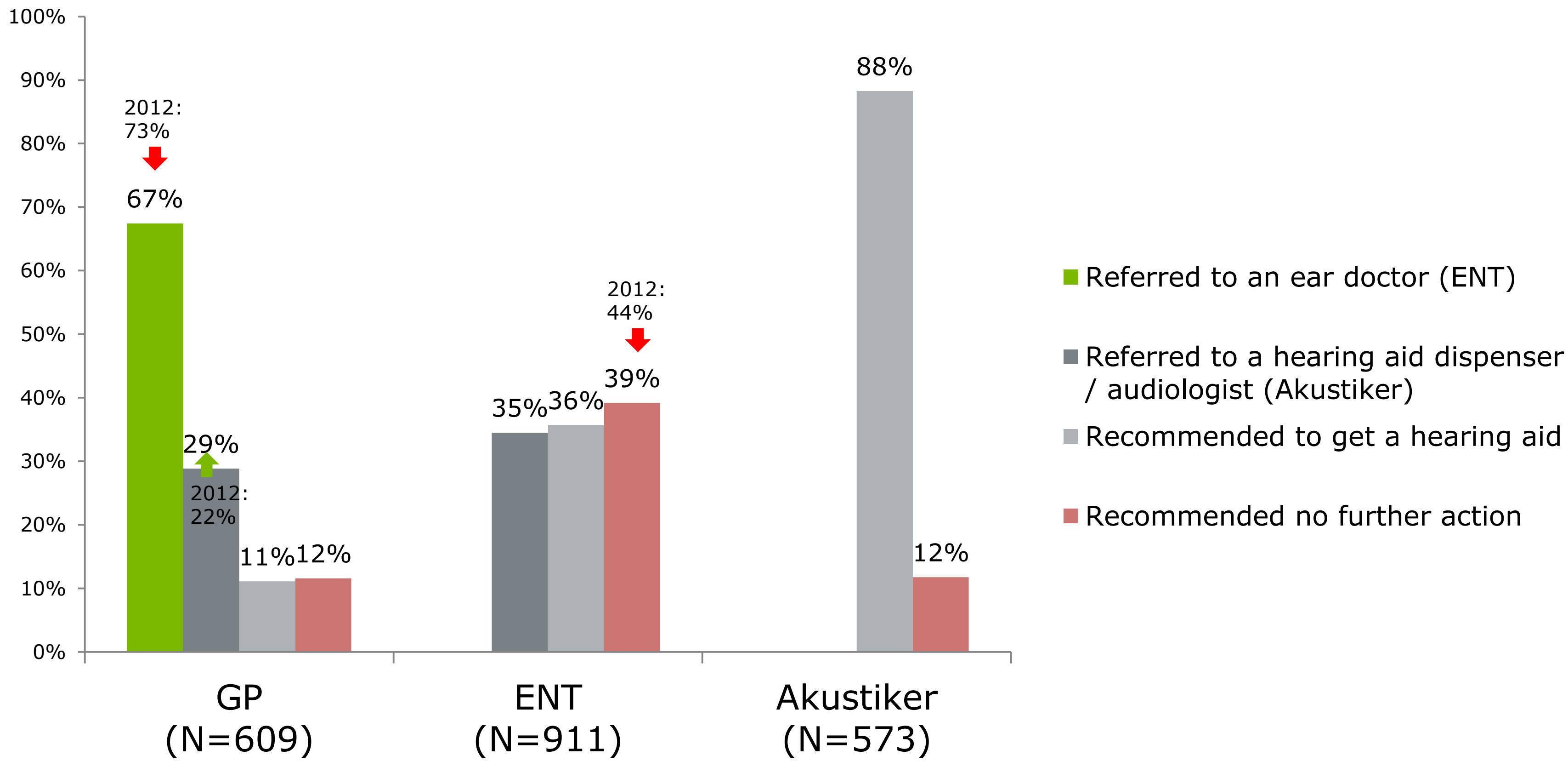


The route to the hearing aid: Akustiker

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



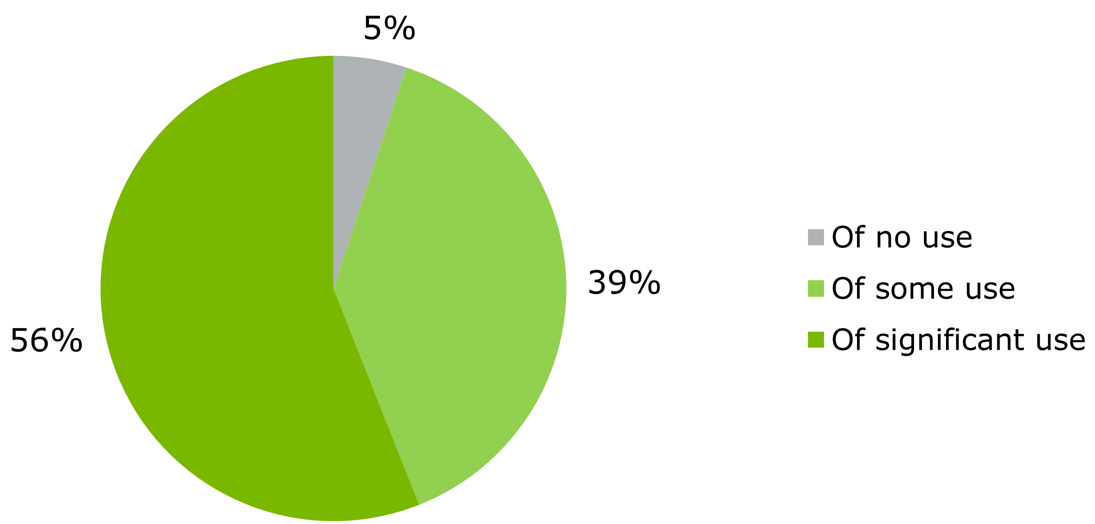
Recommendations by profession



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

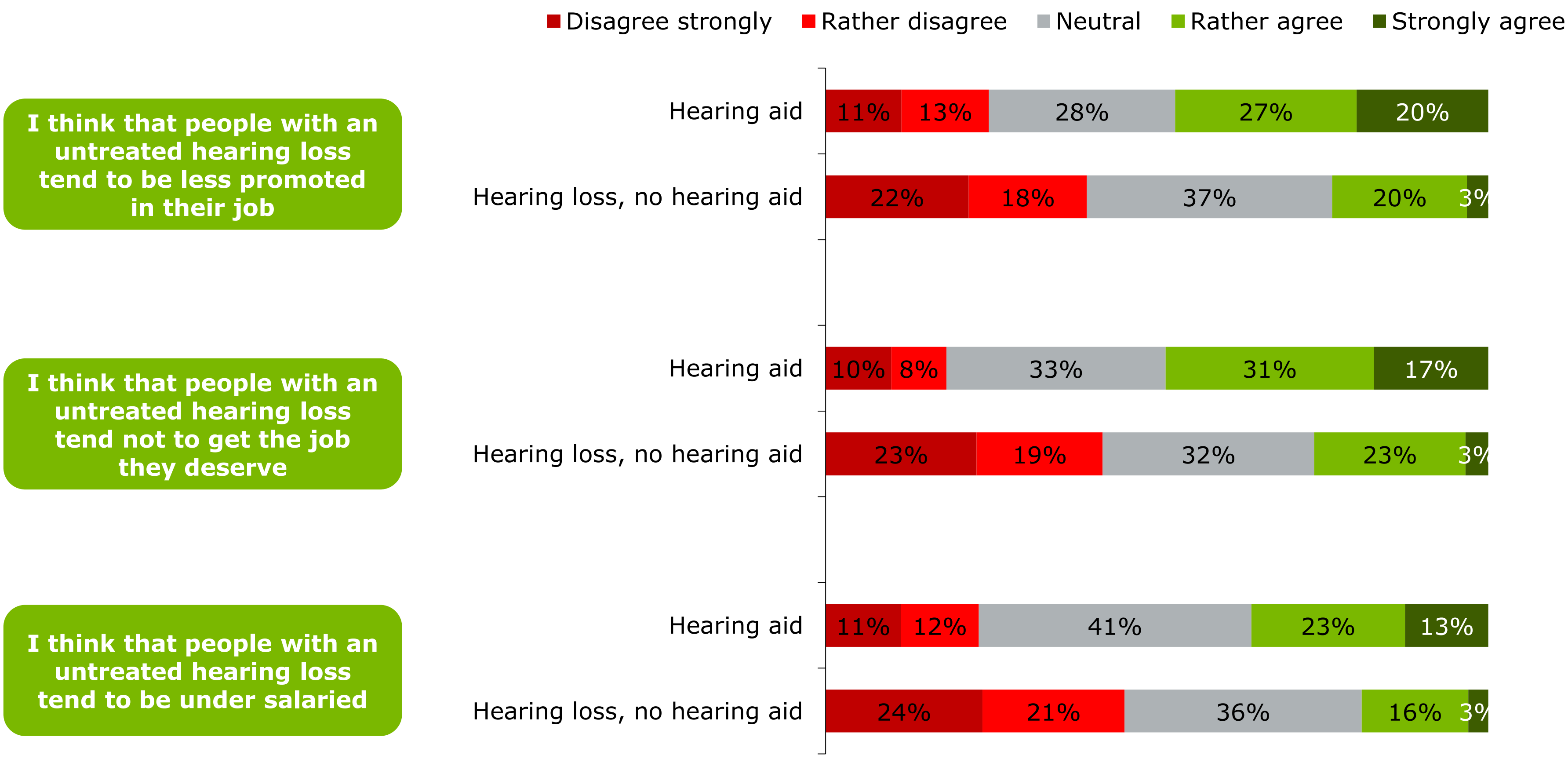
Work competitiveness: 95% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?



Base: N=145

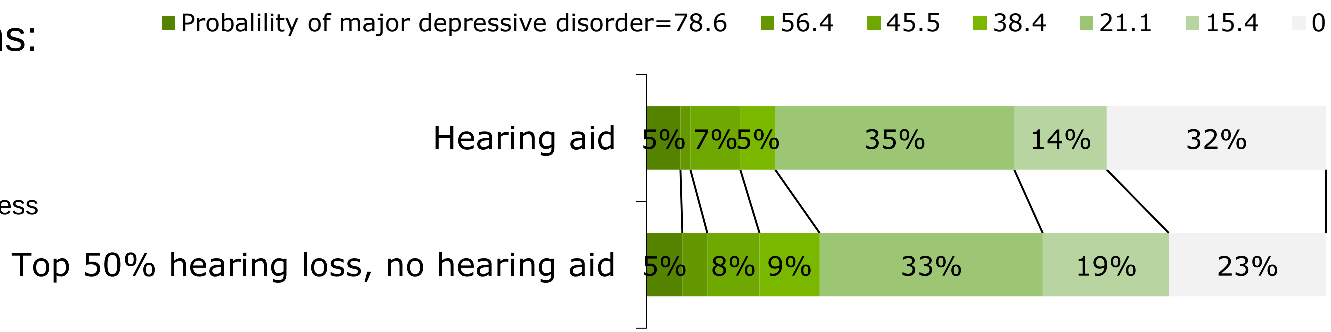
Work competitiveness: People with hearing aids recognize that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to get more salary.



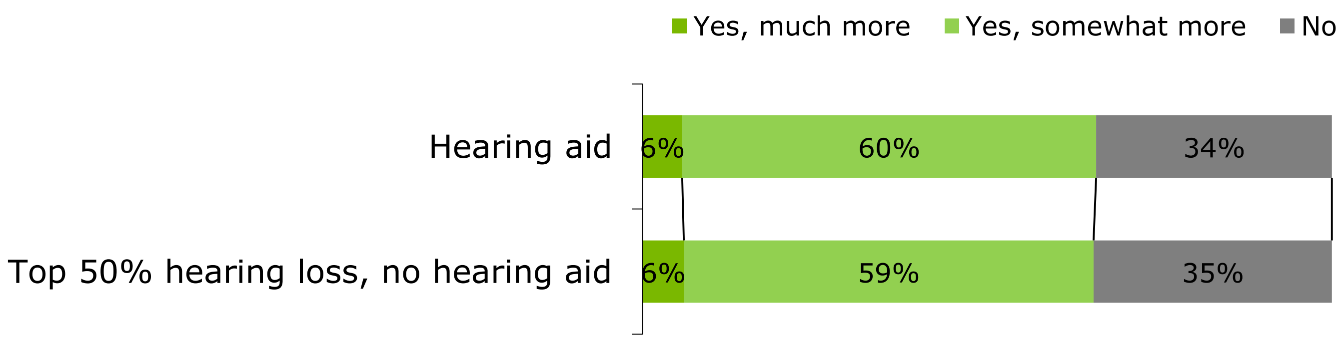
Base: hearing aid n=398 / Hearing loss, no hearing aid =612

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



Dementia symptom:
Getting more forgetful in the last year?

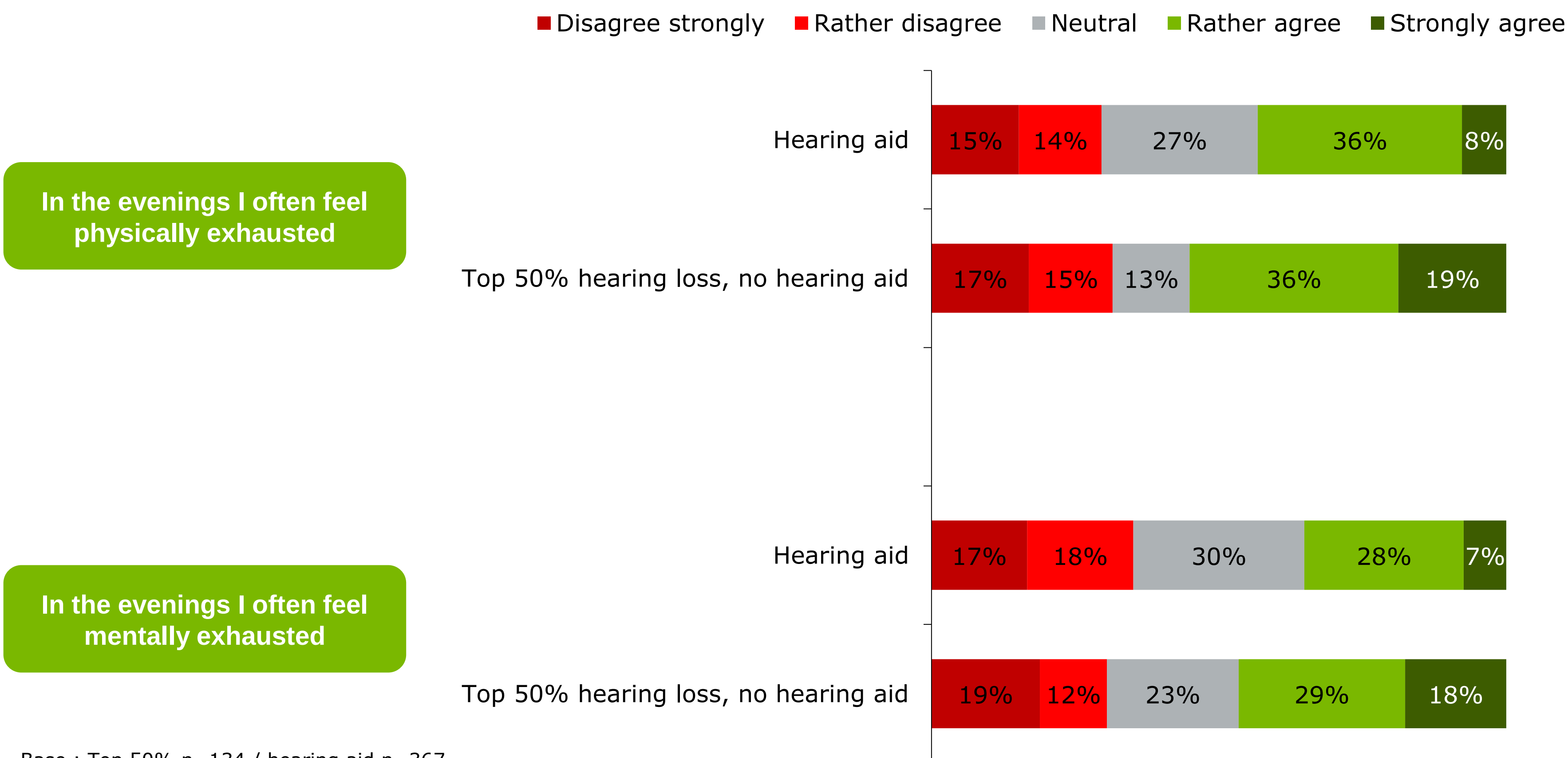


Base: hearing aid n=367 / no hearing aid =134

*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



Base : Top 50% n=134 / hearing aid n=367

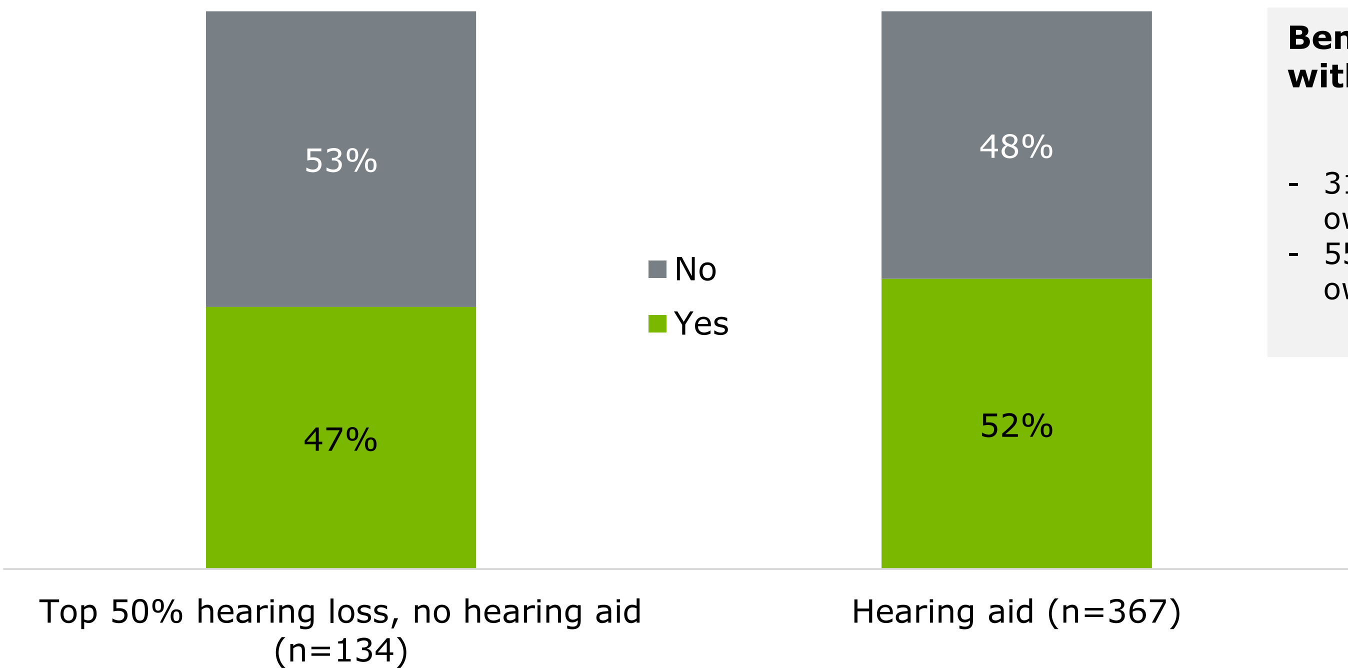
*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- 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?



Benchmarks (% satisfied with quality of sleep):

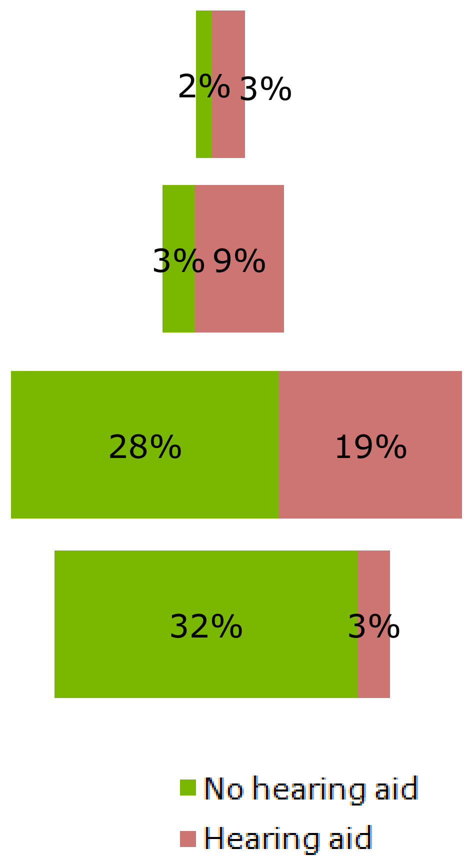
- 31% of dissatisfied hearing aid owners (n=40)
- 55% of satisfied hearing aid owners (n=280)

3. Analysis of hearing aid owners

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

Low adoption rates within mild and moderate hearing loss

Stated hearing loss	(% of impaired population*)	Adoption rate % 2015	2012	2009
Profound+	(5%)	72%*	62%*	62%*
Severe+	(13%)			
Moderate+	(47%)	41%	36%	22%
Mild+	(35%)	10%	11%	8%

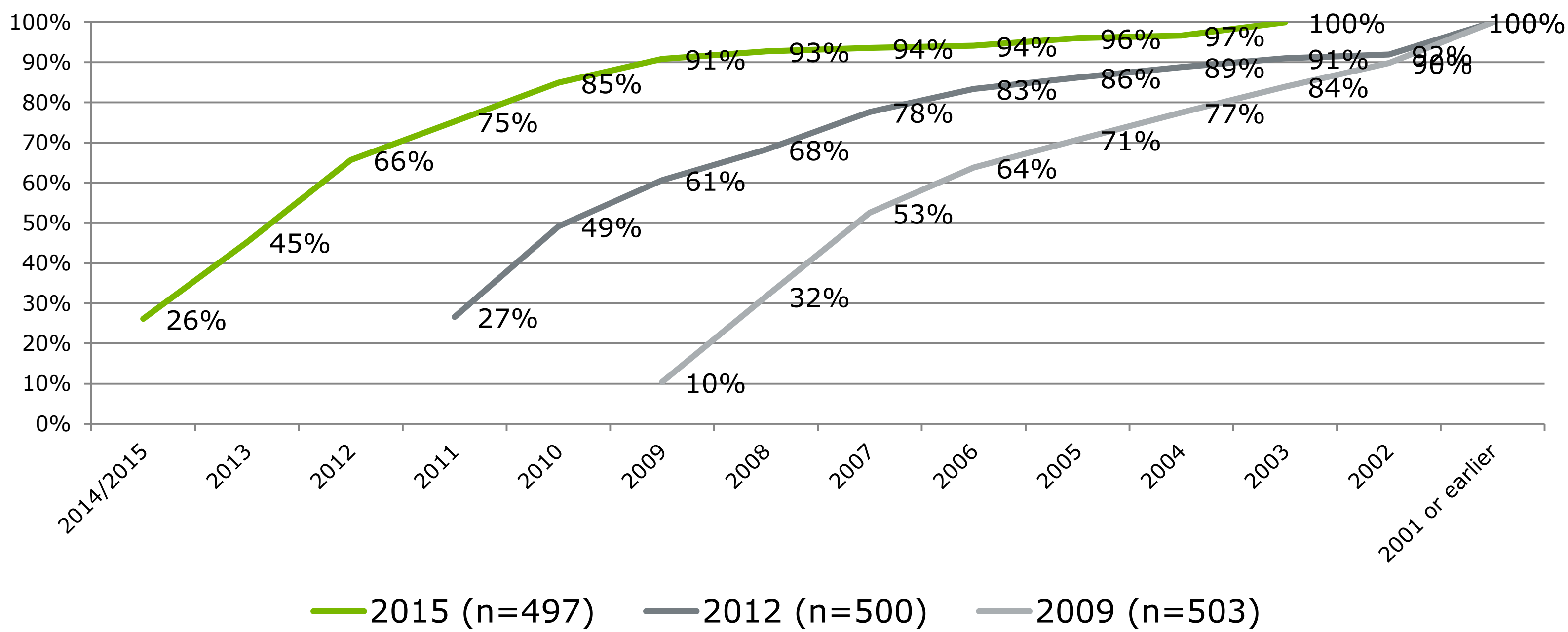


Base: n=1’304
Sums can differ from 100% due to rounding
* combined “severe” and “profound” because n is too small

+
2009: Schwach- Mässig-Stark-Sehr stark
2012/15: Leicht-Mittel-Schwer-Hochgradig

66% of the currently owned HAs were fitted in 2012 or later

Year of purchase

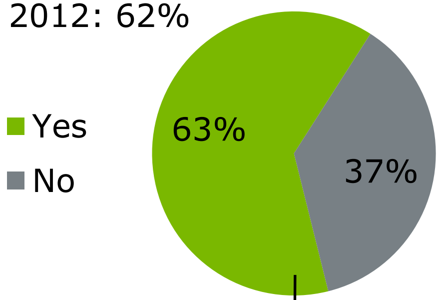


Age of currently owned HAs (Mean):
2015: 2.9 years
2012: 3.0 years
2009: 3.4 years

On average 2-3 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.

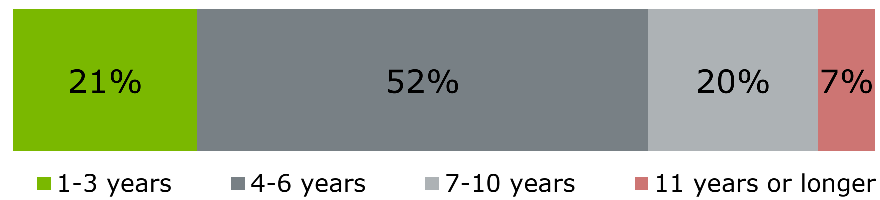
Current HAs = first HAs?

2012: 62%



HA-owner, n=505

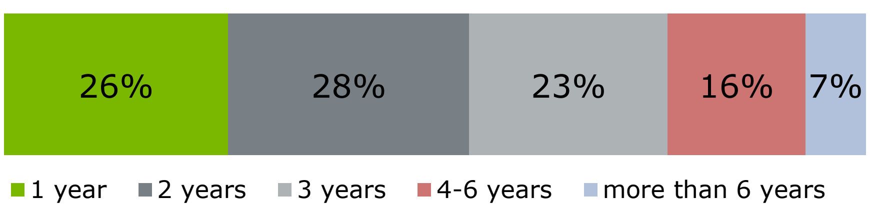
How many years did you own your previous HAs?



Base: n=166

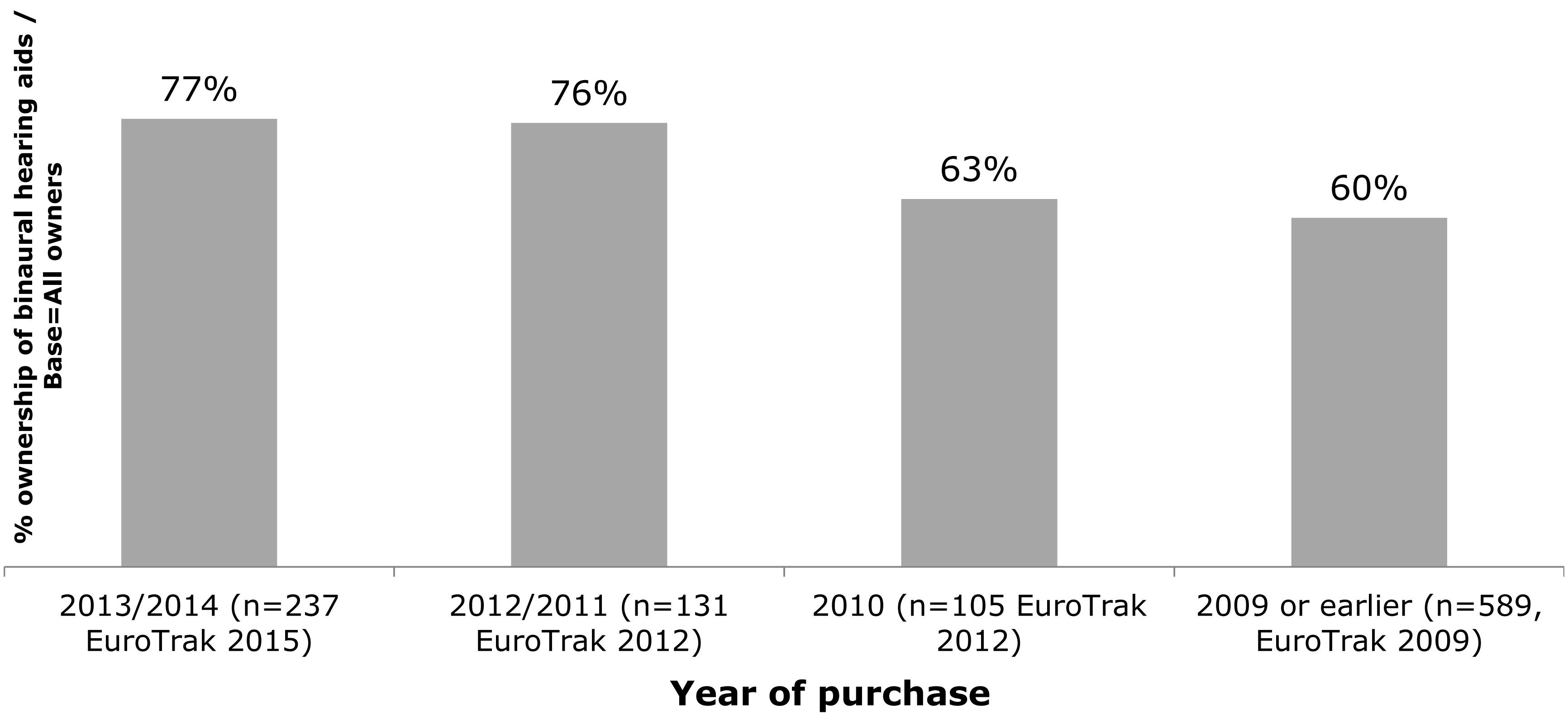
Age of HA before it has been replaced:
2015: 5 years (median)
2012: 6 years (median)

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?



Base: n=330

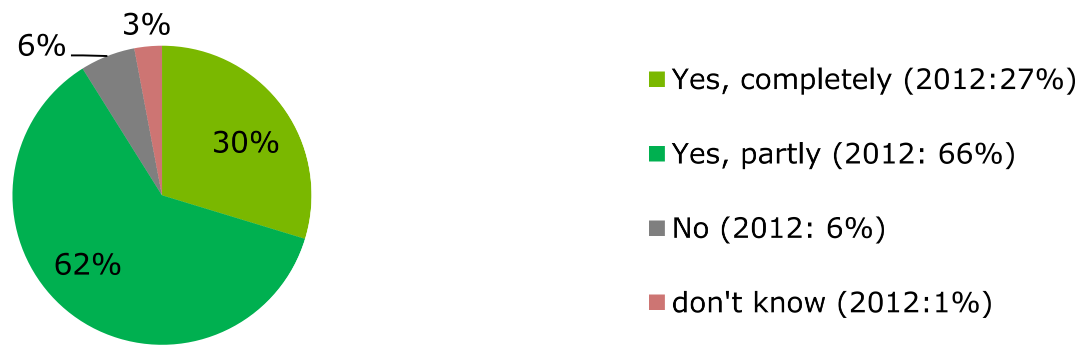
Monaural-binaural treatment by purchase date



While hearing impaired without hearing aids tend not to know whether a third party would pay any part of hearing aids – more than 90% of the hearing aid owners received some kind of 3rd party reimbursement

2015

Owners: Was any part or all of your hearing aid(s) paid for by a third party ? (Insurance, Government, …)



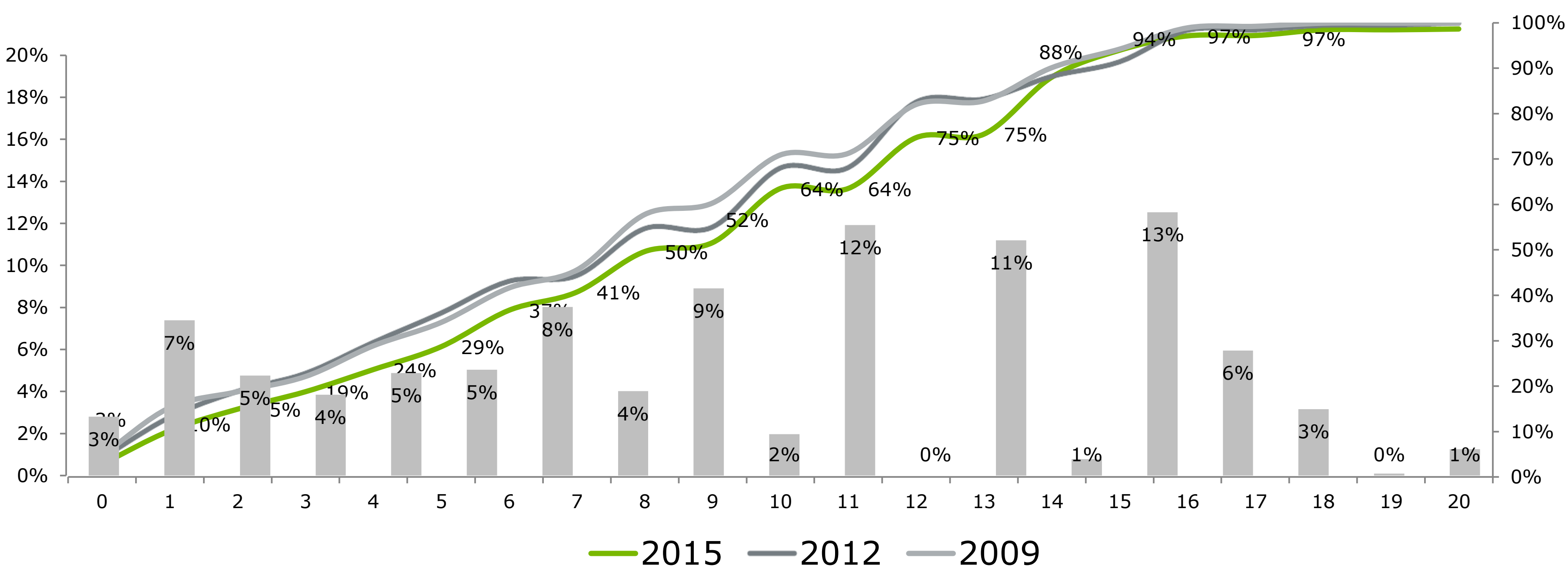
HA-owner, n=505

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, Government, …)

HA-non-owners, n=799

On average, HAs are worn 8.7 hours a day

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

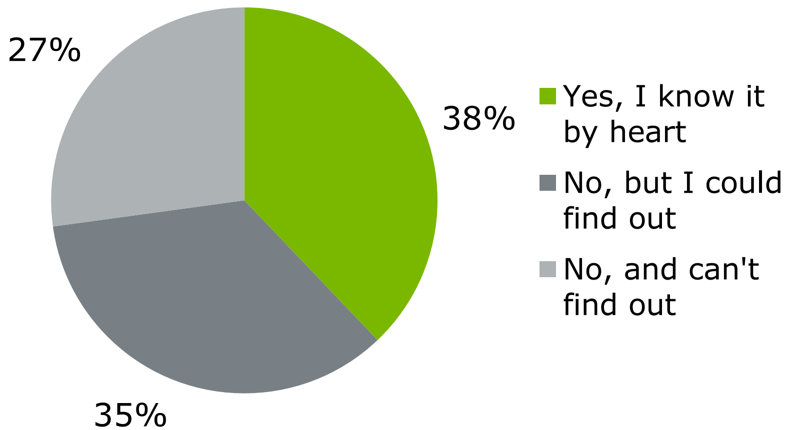


HA worn:
2015 Mean: 8.7 hours/day
2012 Mean: 8.0 hours/day
2009 Mean: 7.7 hours/day

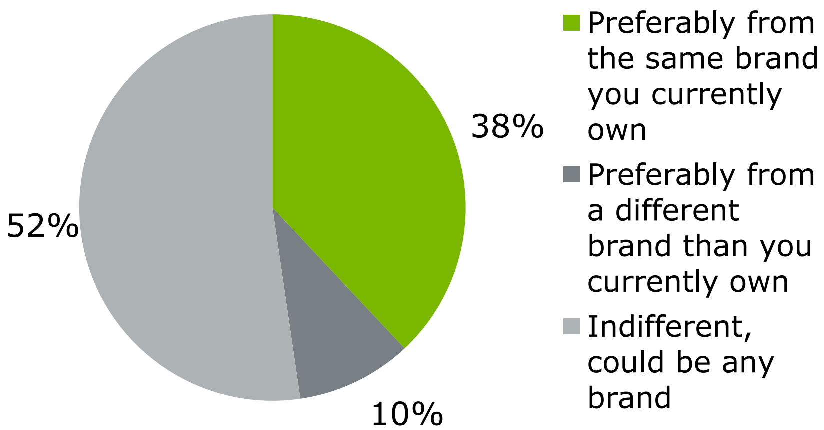
HA-owner:
2015: n=505
2012: n=500
2009: n=503

38% of today’s hearing aid owners are aware of their hearing aid brand

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



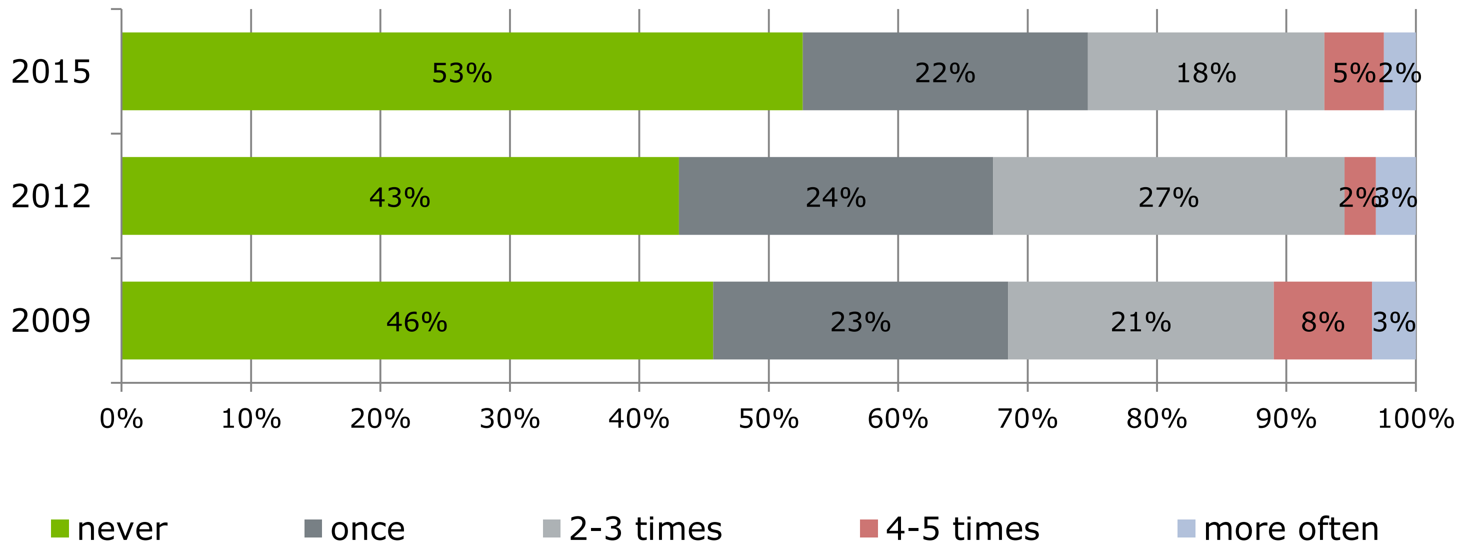
In case you plan to obtain new hearing aid(s), what brand would you choose?



Base: N=505 / 395

75% of the currently owned HAs either had no repair need or only once

How often has your current hearing aid required a repair because it was not working properly?

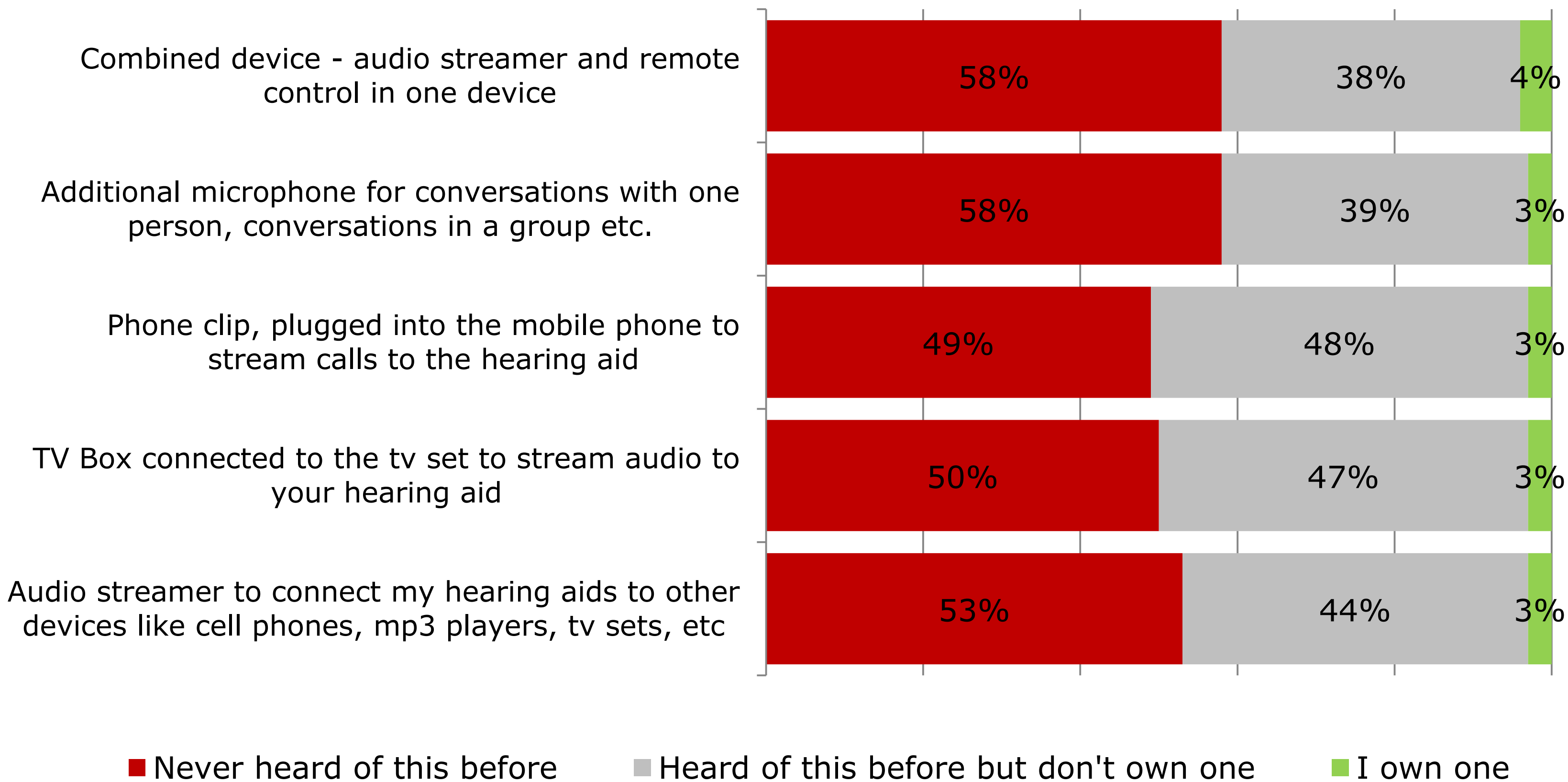


HA-owner:
2015: n=505
2012: n=500
2009: n=503

Awareness and usage of accessories and Telecoil

Accessories are owned seldom in Germany

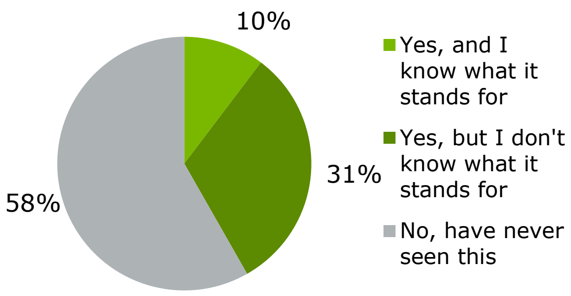
Which of the following accessories have you heard of and which ones do you own?



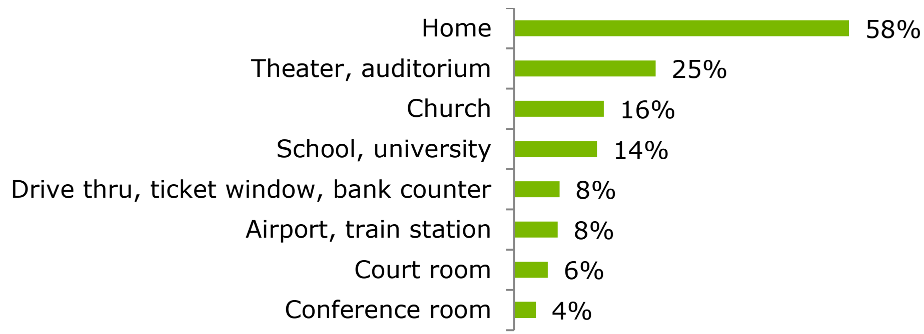
Base: N=505

10% of hearing aid owners know what Telecoil is, 5% have used it – mainly at home. More than 50% of those who use it are satisfied.

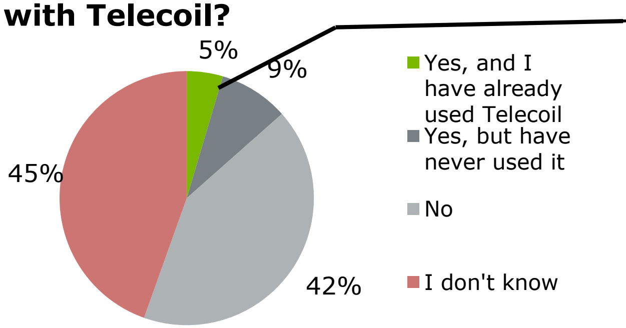
Have you seen this logo before?



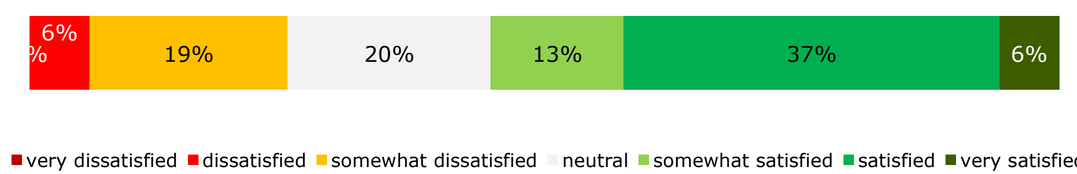
On what type of venues have you used hearing aids in a hearing loop (Telecoil)?



Are your hearing aids equipped with Telecoil?



How satisfied are you with the use of Telecoil overall?



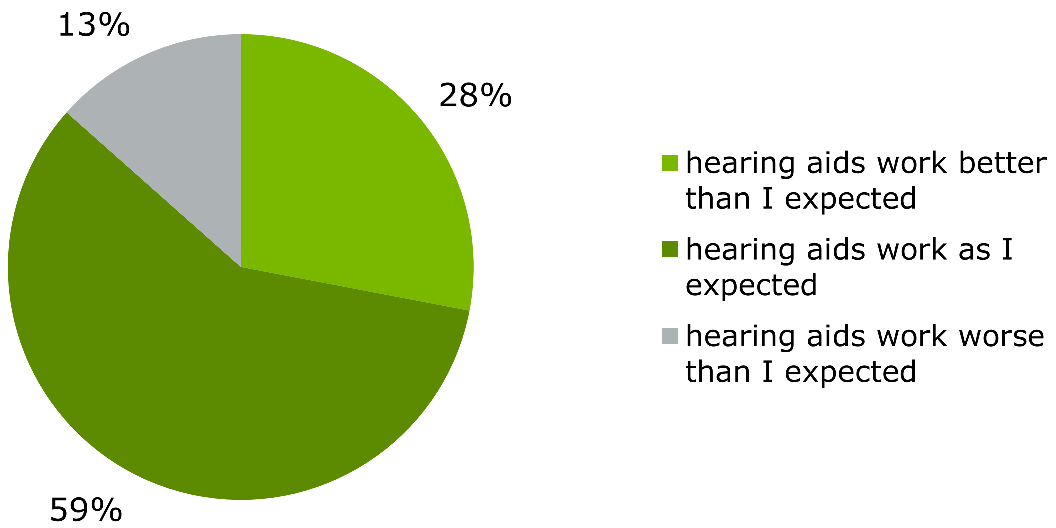
HA-owner, n=505

HA-owner, who have used Telecoil, n=28 (low sample!)

Satisfaction with hearing aids and drivers

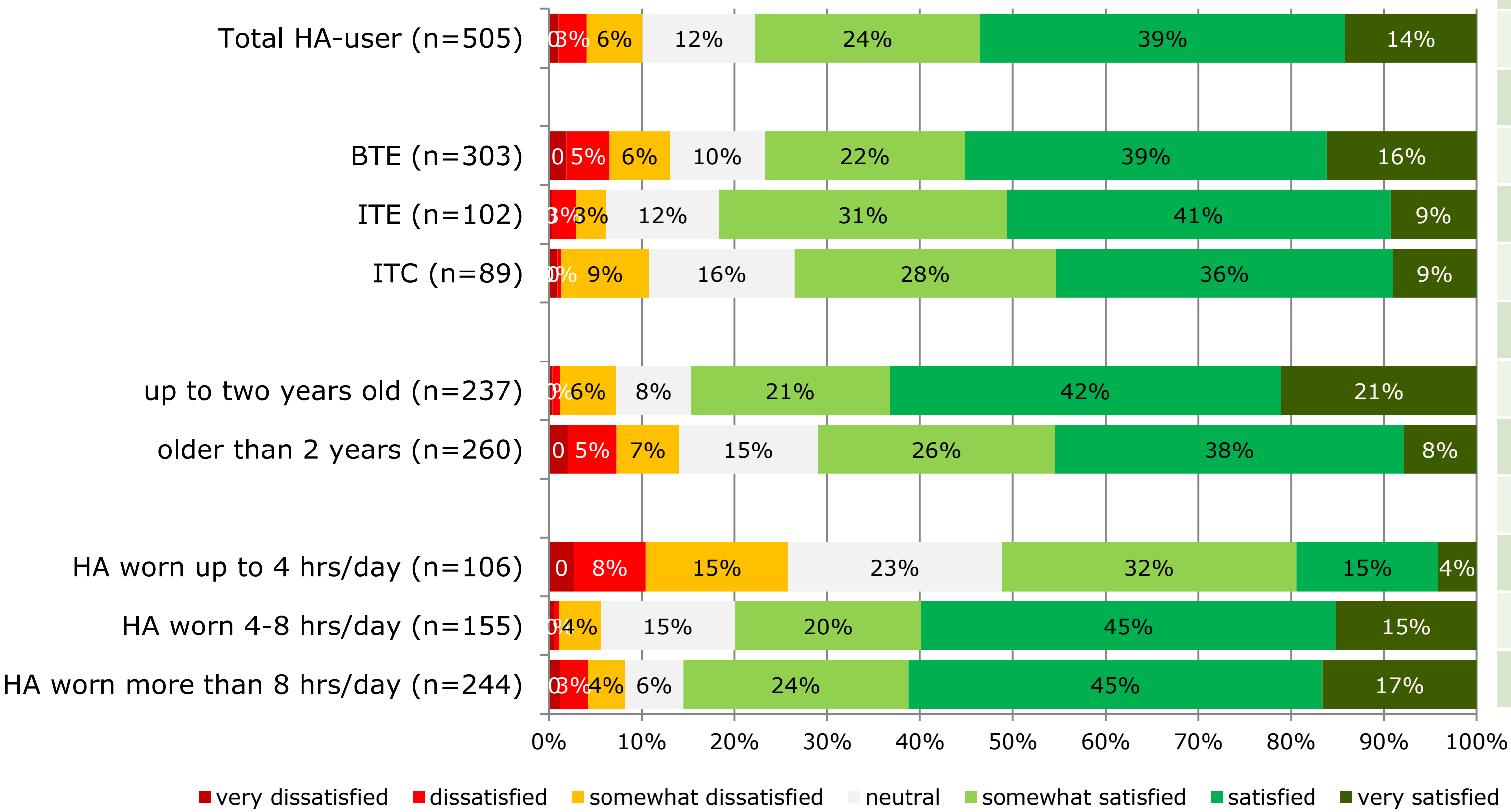
87% of the hearing aid owners say their hearing aid works better than or as expected

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



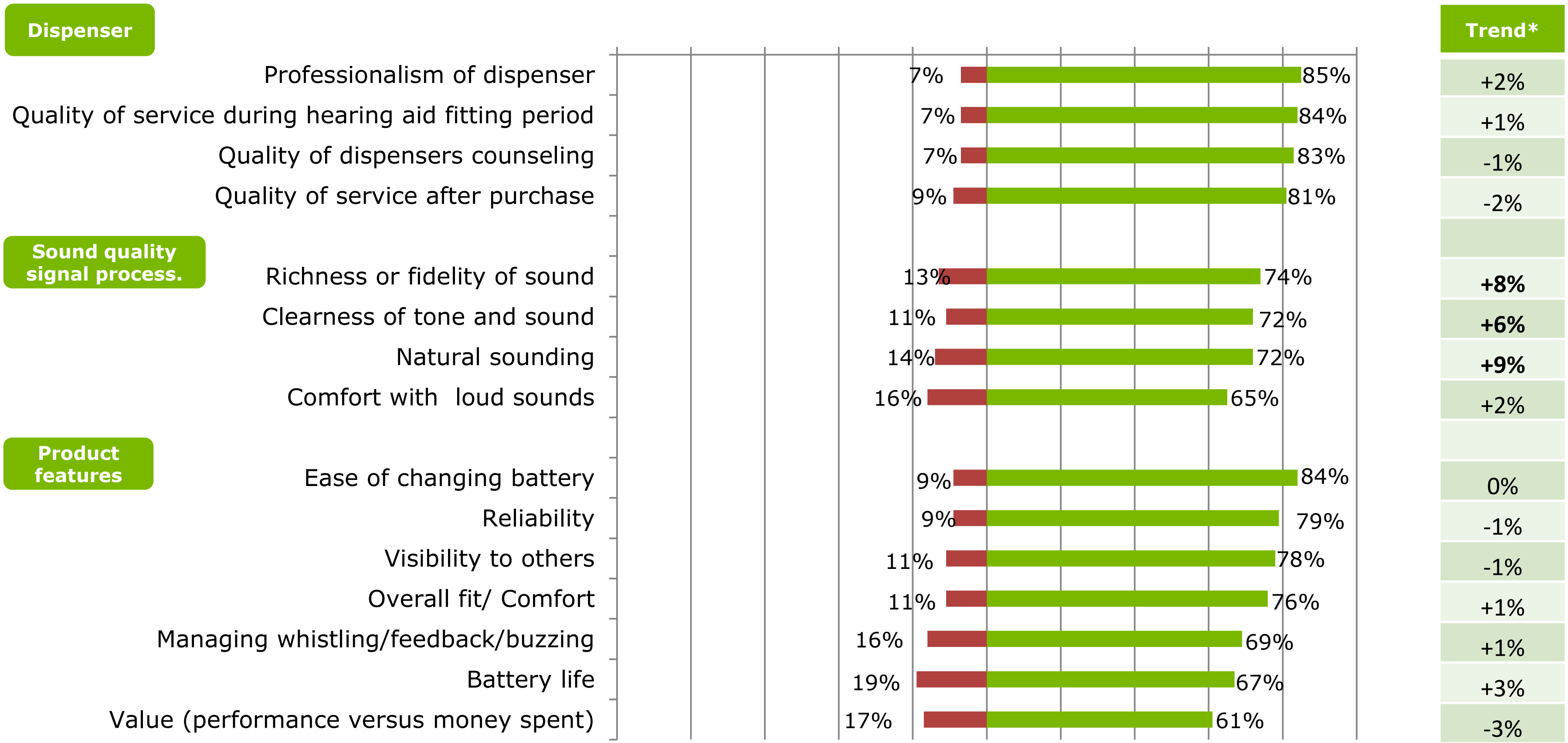
Base: N=505

Overall satisfaction is stable since 2012



% Satisfied		
2015	2012	2009
77%	77%	72%
77%	83%	74%
82%	69%	81%
74%	73%	64%
85%	87%	-
71%	68%	-
51%	44%	51%
80%	86%	78%
86%	86%	81%

Satisfaction with current hearing aids



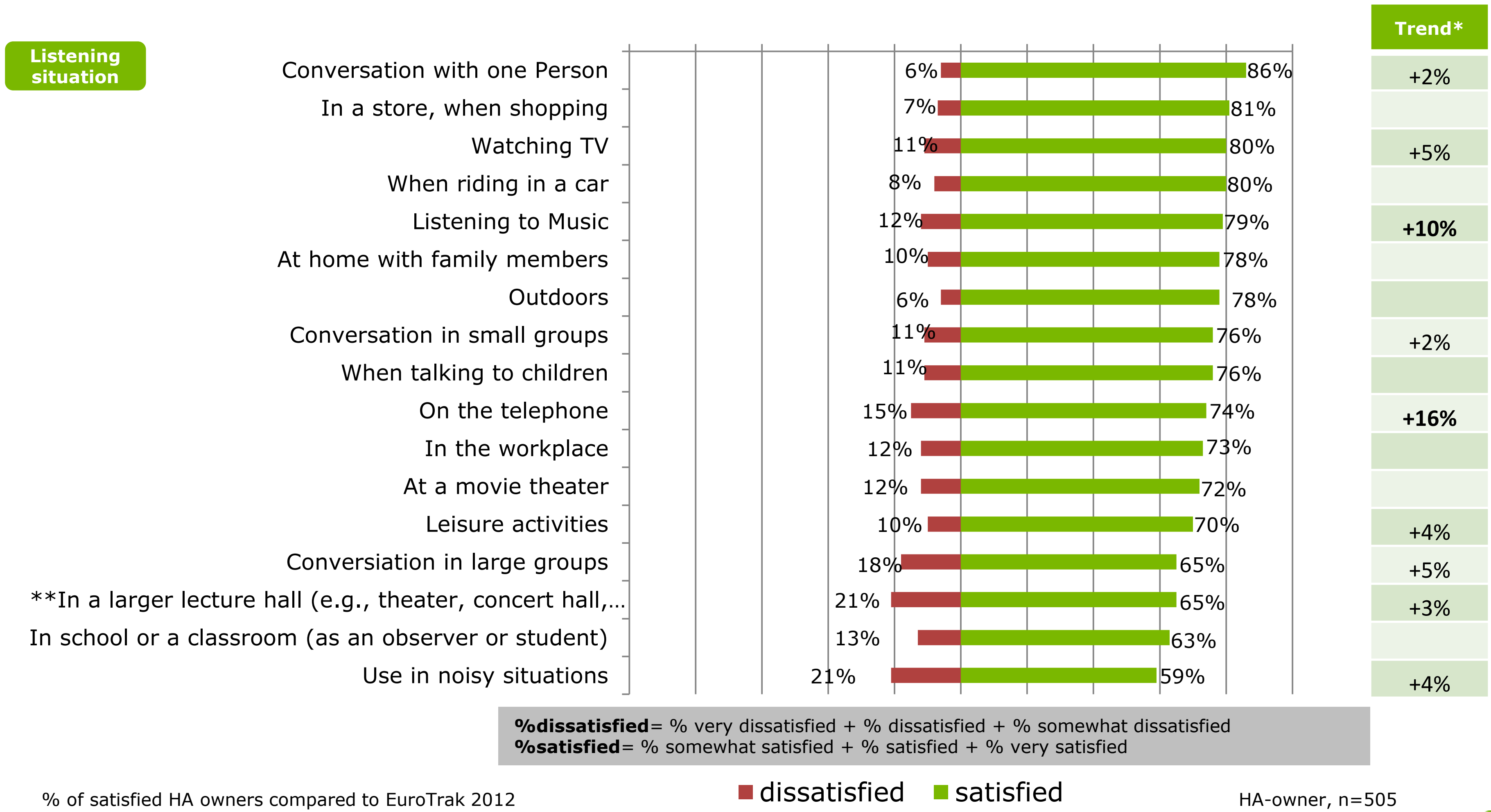
%dissatisfied= % very dissatisfied + % dissatisfied + % somewhat dissatisfied
%satisfied= % somewhat satisfied + % satisfied + % very satisfied

dissatisfied satisfied

% of satisfied HA owners compared to EuroTrak 2012

HA-owner, n=505

Satisfaction with current hearing aids



% of satisfied HA owners compared to EuroTrak 2012

** question slightly changed: 2012=Understanding a lecture in a large public place

HA-owner, n=505

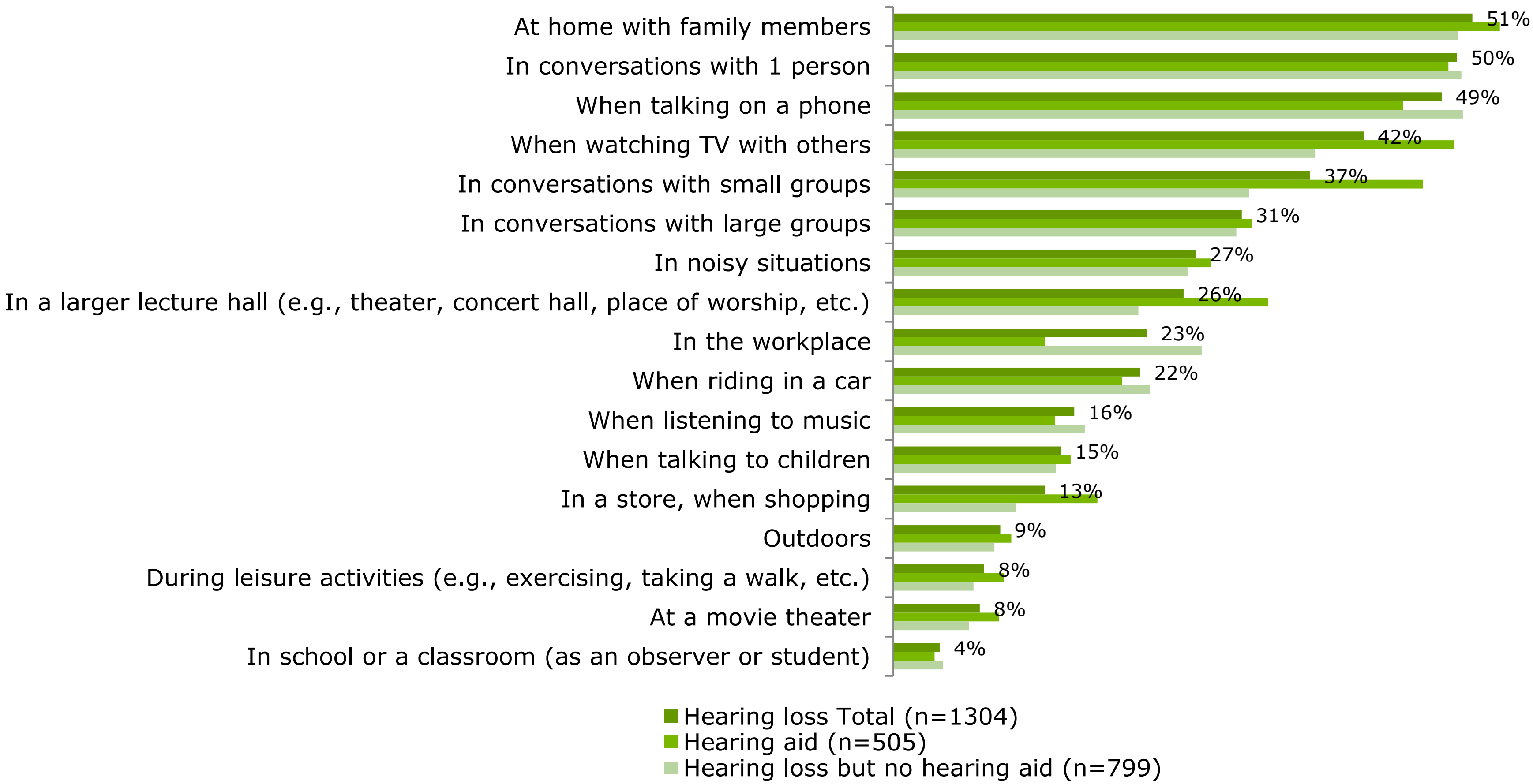
Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA

		Influence on overall satis-faction with HA*
Dispenser	Quality of service after purchase	0.71
	Quality of service during hearing aid fitting period	0.67
	Quality of dispensers counseling	0.63
	Professionalism of dispenser	0.62
Sound quality signal process.	Richness or fidelity of sound	0.76
	Clearness of tone and sound	0.74
	Natural sounding	0.74
	Comfort with loud sounds	0.72
Product features	Reliability	0.63
	Overall fit/ Comfort	0.62
	Managing whistling/feedback/buzzing	0.60
	Value (performance versus money spent)	0.58
	Visibility to others	0.56
	Ease of changing battery	0.55
	Battery life	0.48

***The Influence has been calculated with a correlation**: 0 means no relation between a criterion and overall satisfaction ; 1 means a maximal relationship. **Read:** richness or fidelity of sound is the most important criterion for satisfaction.

Important listening situations

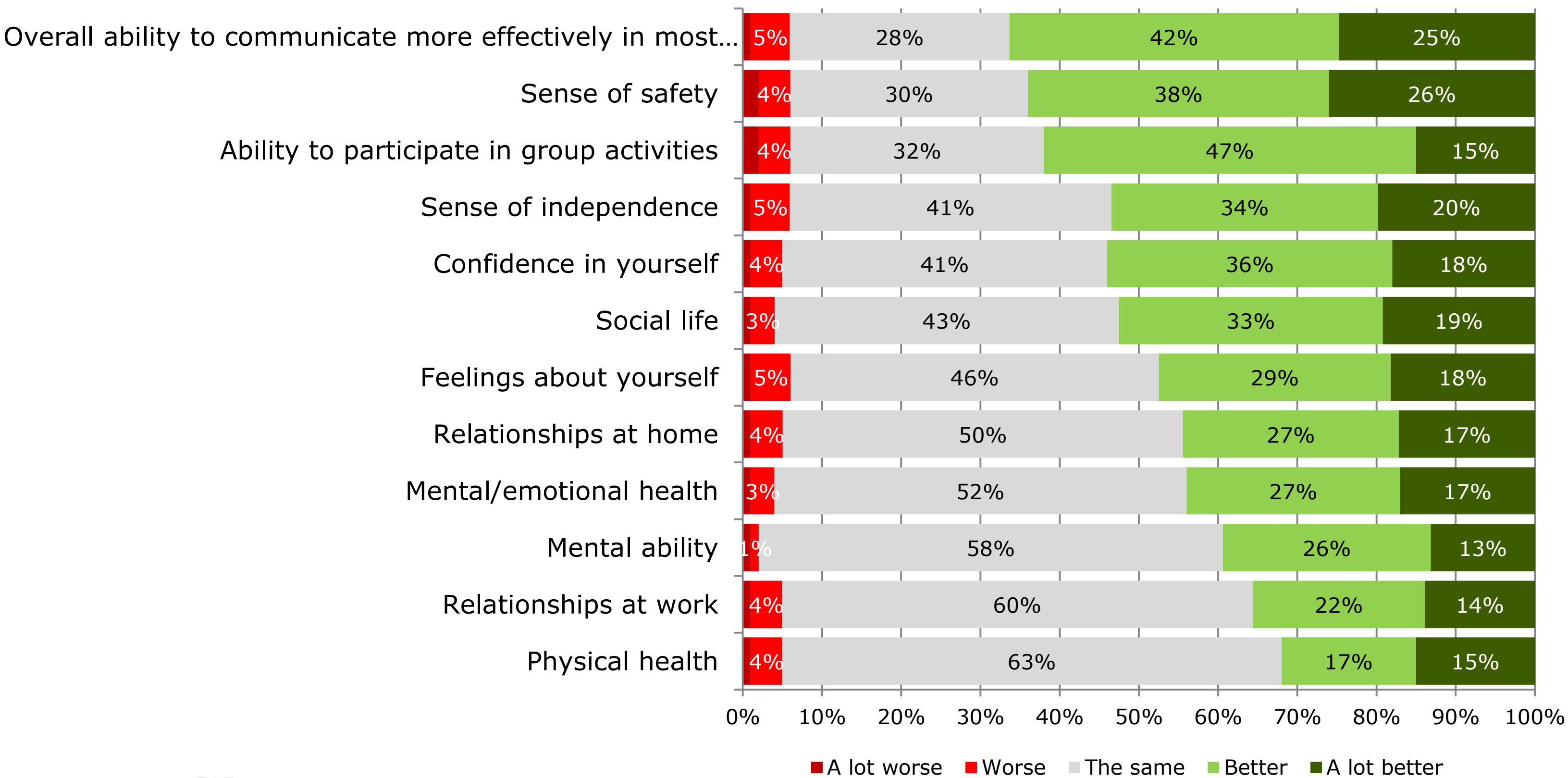
In which of these situations is it most important for you to hear well? (choose up to 5)



Positive impact of hearing aids, quality of life

Significant positive impact of HAs on different aspects: Especially communication effectiveness, sense of safety and participation in group activities improve with hearing aids.

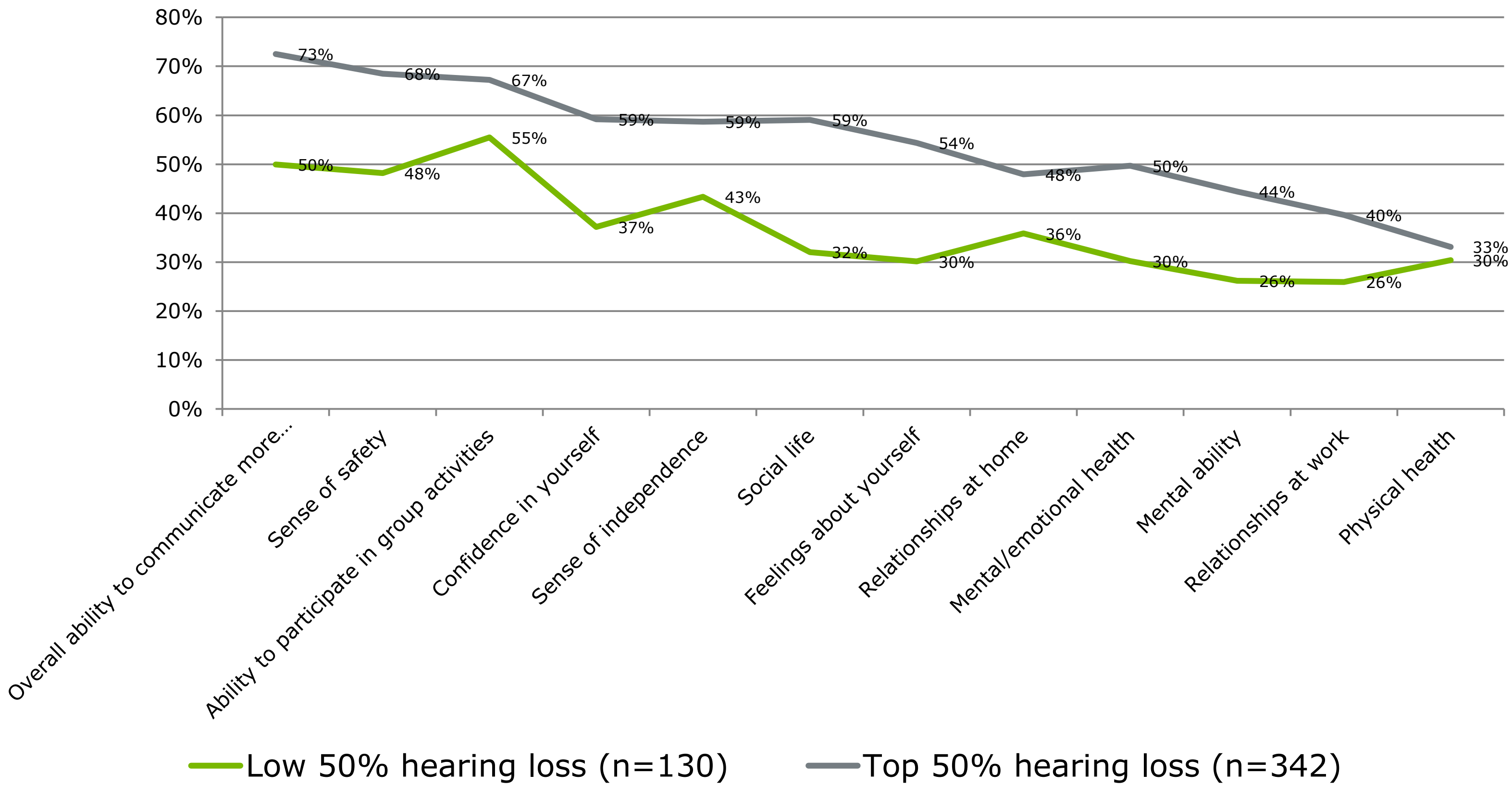
Since you started using your hearing aid(s), please rate the changes you have experienced in each of the following areas, that you believe are due to your hearing aid(s).



HA-owner, n=505

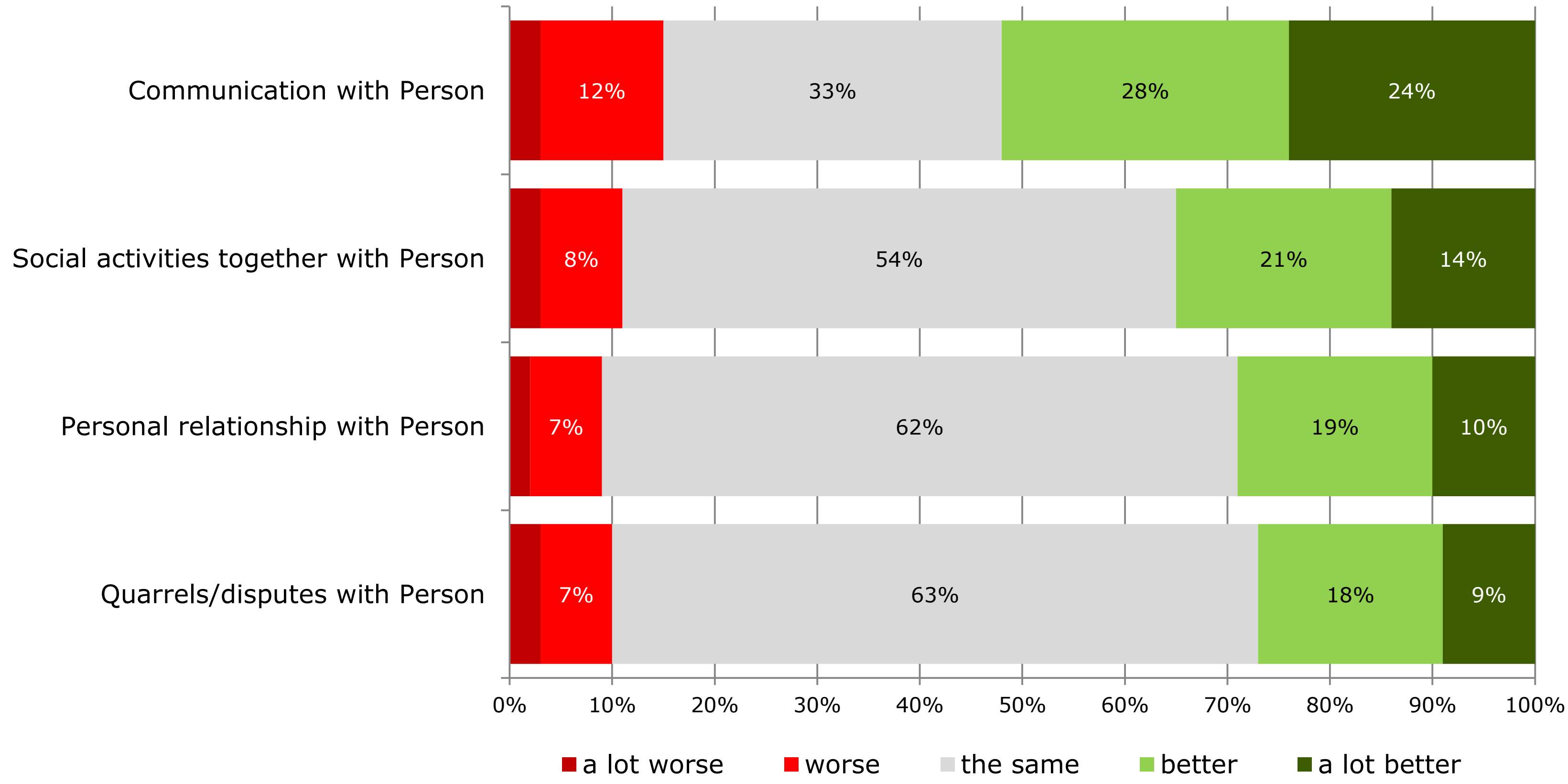
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA owners feeling better/a lot better



Even for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids

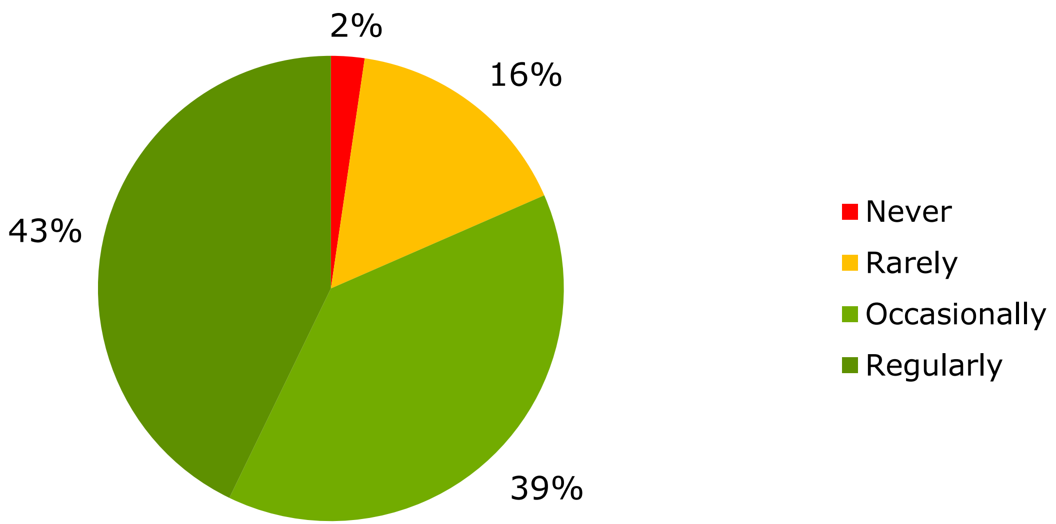
How did the following aspects change since person X is wearing hearing aids?



Someone in HH / parent has HA, n=435-465

98% 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?



Base: N=505

4. Analysis of hearing impaired non-owners

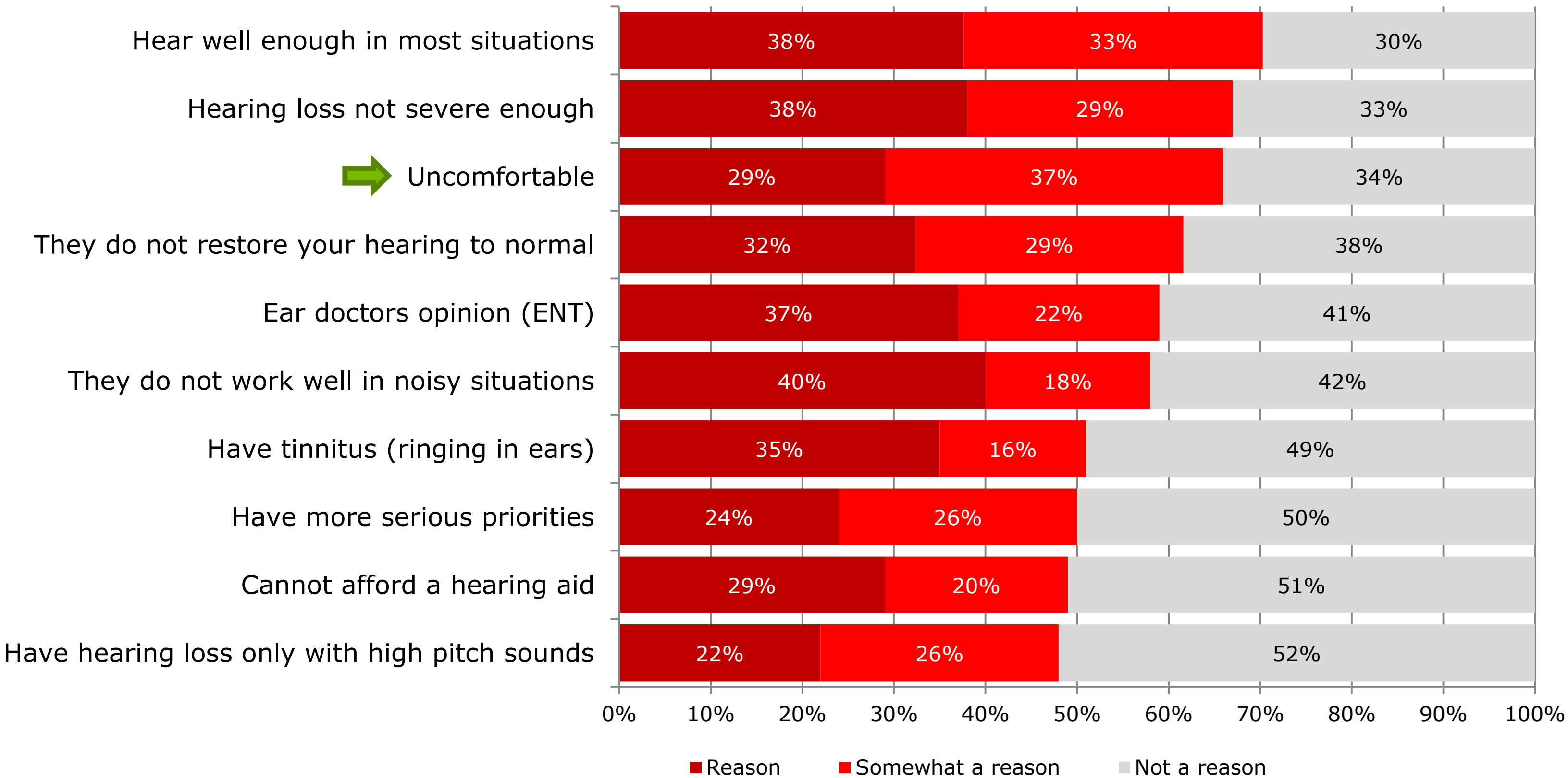
Reasons for not having hearing aids and why some people can consider hearing aids as uncomfortable

To analyse 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

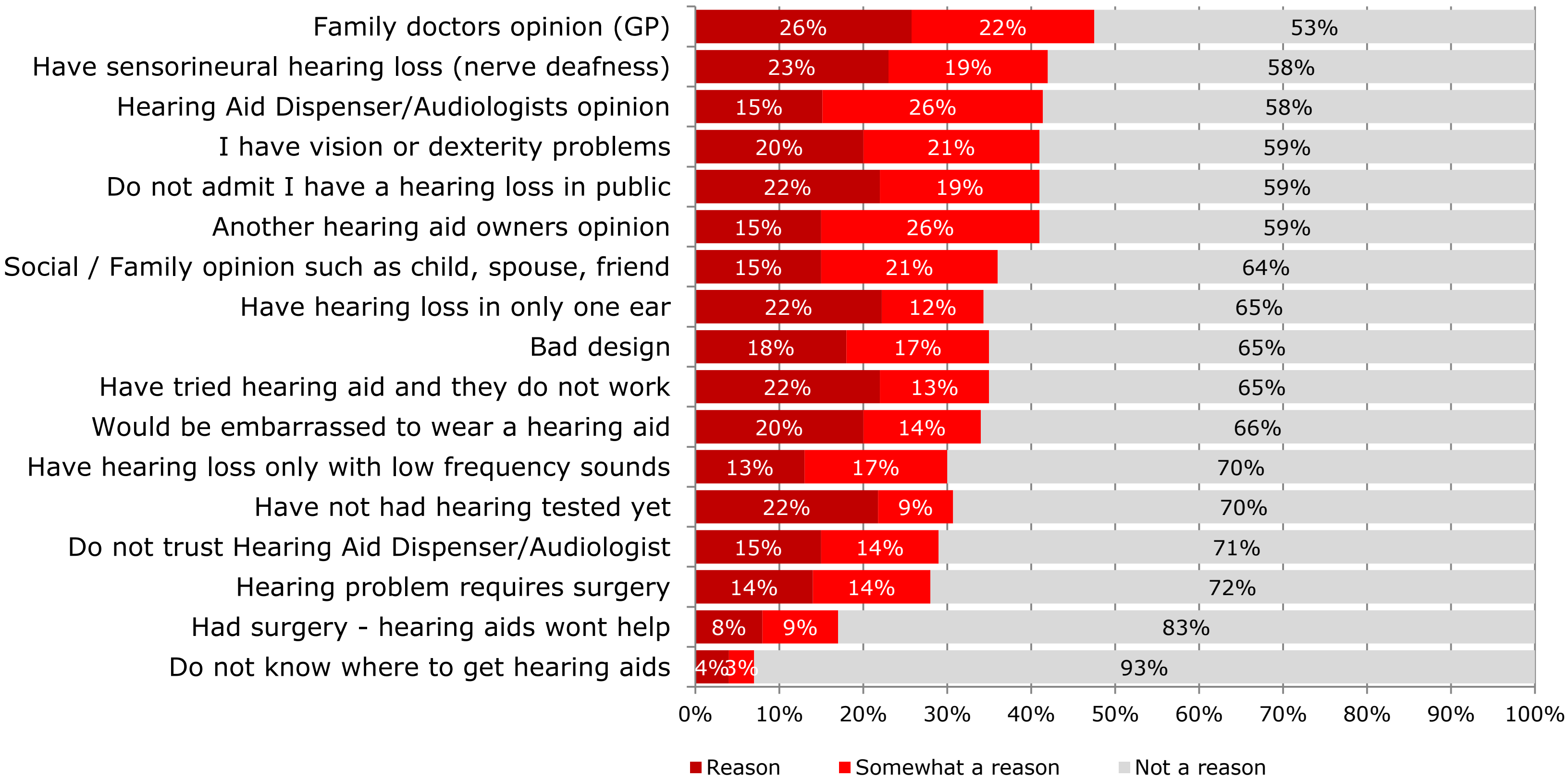
	% HA Owner (n=505)	%HA-Non-owner Low 50% HL (n=465)	%HA-Non-owner Top 50% HL (n=209)
Ears impaired			
Unilateral loss	19%	40%	32%
Bilateral loss	81%	60%	68%
Perceived loss		More similar hearing loss-structure	
Mild	10%	62%	20%
Moderate	54%	34%	62%
Severe	26%	2%	14%
Profound	10%	2%	5%

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



Base: non owners Top 50% HL: n=209

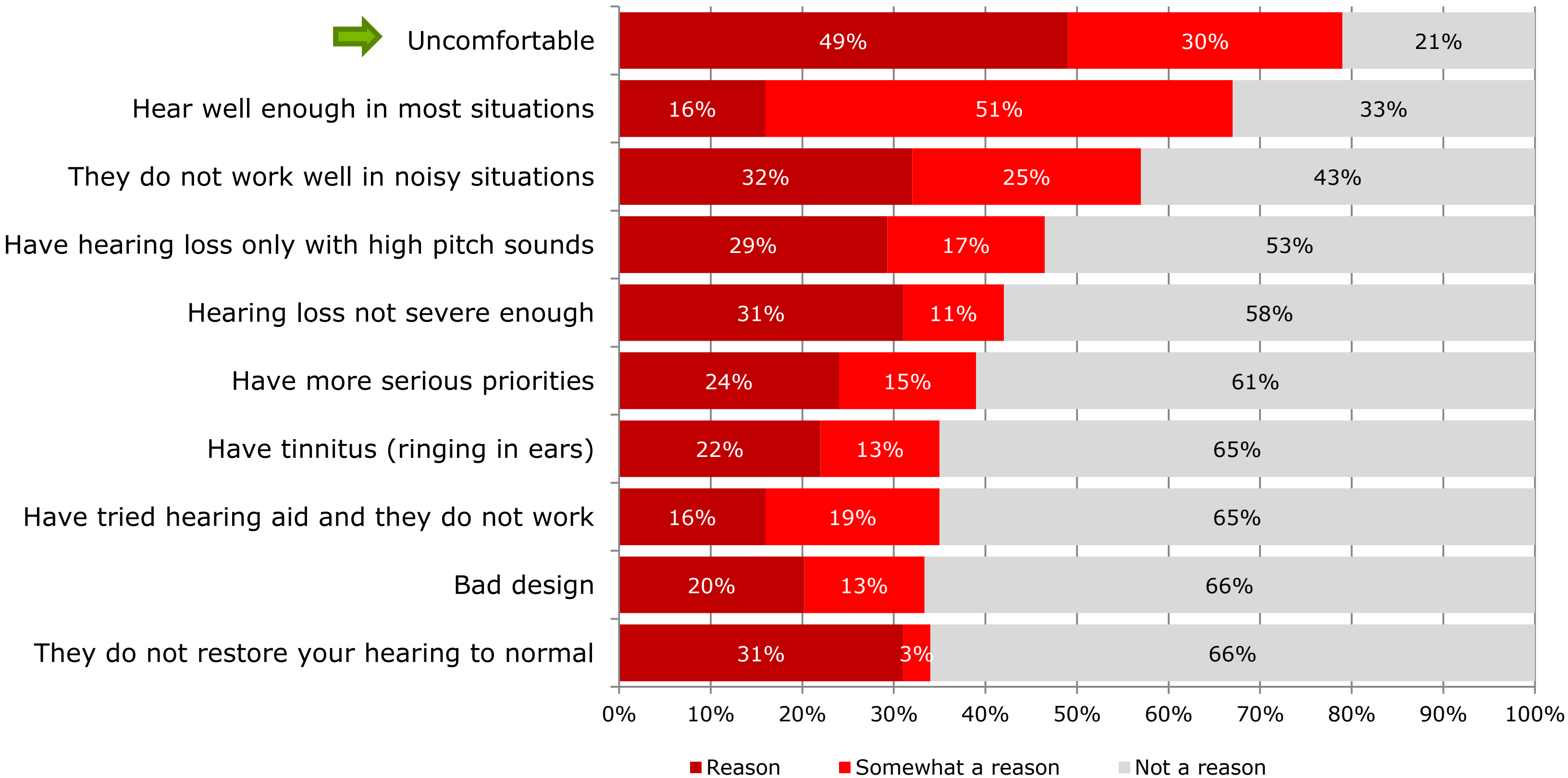
Less important reasons for not having a hearing aid (II/II)



	Reason	Somewhat a reason	Not a reason
Family doctors opinion (GP)	26%	22%	53%
Have sensorineural hearing loss (nerve deafness)	23%	19%	58%
Hearing Aid Dispenser/Audiologists opinion	15%	26%	58%
I have vision or dexterity problems	20%	21%	59%
Do not admit I have a hearing loss in public	22%	19%	59%
Another hearing aid owners opinion	15%	26%	59%
Social / Family opinion such as child, spouse, friend	15%	21%	64%
Have hearing loss in only one ear	22%	12%	65%
Bad design	18%	17%	65%
Have tried hearing aid and they do not work	22%	13%	65%
Would be embarrassed to wear a hearing aid	20%	14%	66%
Have hearing loss only with low frequency sounds	13%	17%	70%
Have not had hearing tested yet	22%	9%	70%
Do not trust Hearing Aid Dispenser/Audiologist	15%	14%	71%
Hearing problem requires surgery	14%	14%	72%
Had surgery - hearing aids wont help	8%	9%	83%
Do not know where to get hearing aids	4%	3%	93%

Base: non owners Top 50% HL: n=209

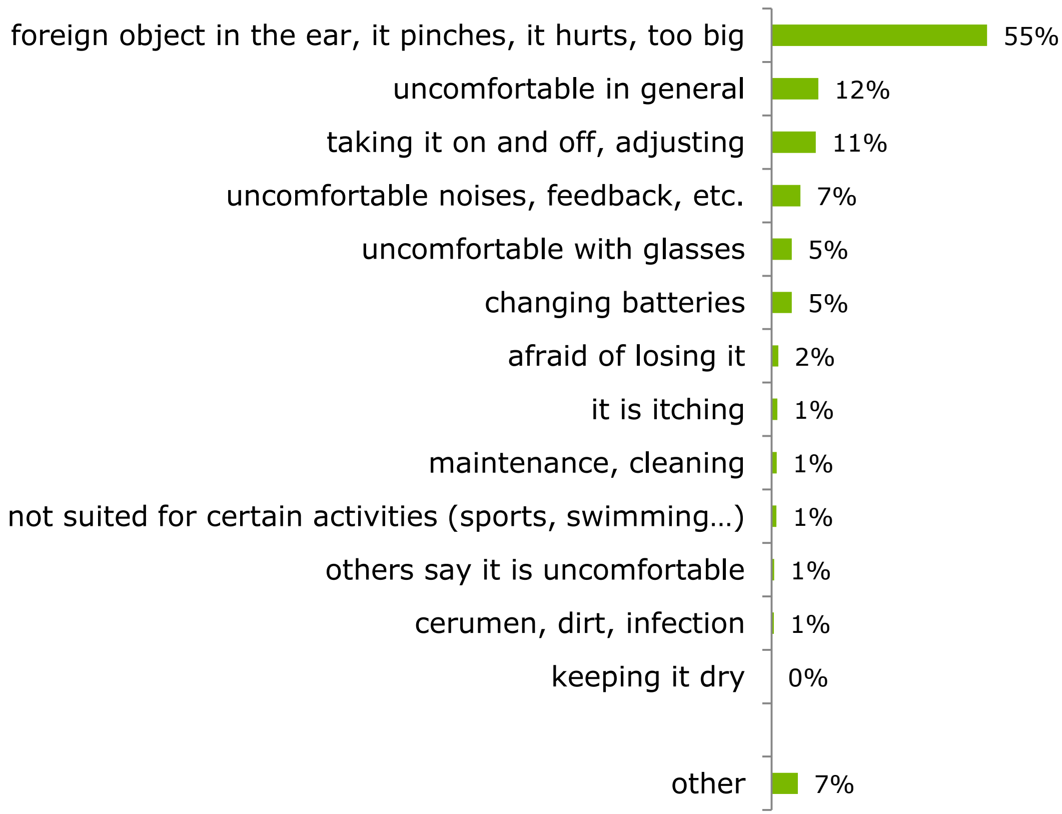
Top 10 reasons for HA owners NOT using them



Owners who don't use, n=22

Meaning of «uncomfortable» (open question)

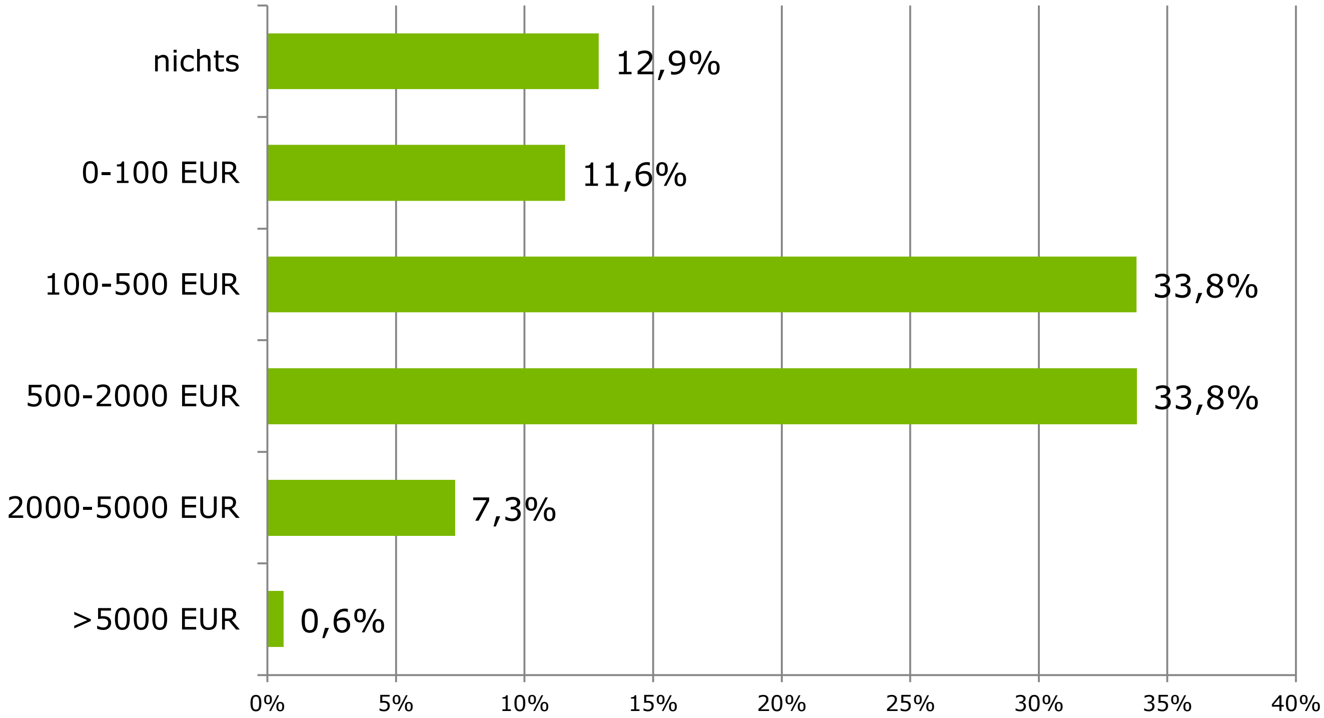
You mentioned "uncomfortable" as a reason why you don't own/use hearing aid(s). Please describe in detail why you consider your hearing aids uncomfortable.



Base: n=332

More than 50% of the non owners think that a hearing aid (including service) should cost them less than 500 Euro.

Wieviel denken Sie müssten Sie für ein passendes Hörgerät sowie den dazugehörigen Service bezahlen (also inkl. Diagnose, individuelle Anpassung und dem Service nach dem Kauf) ?



Question for Germany only

Base: N=799

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

89% 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 aid.

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

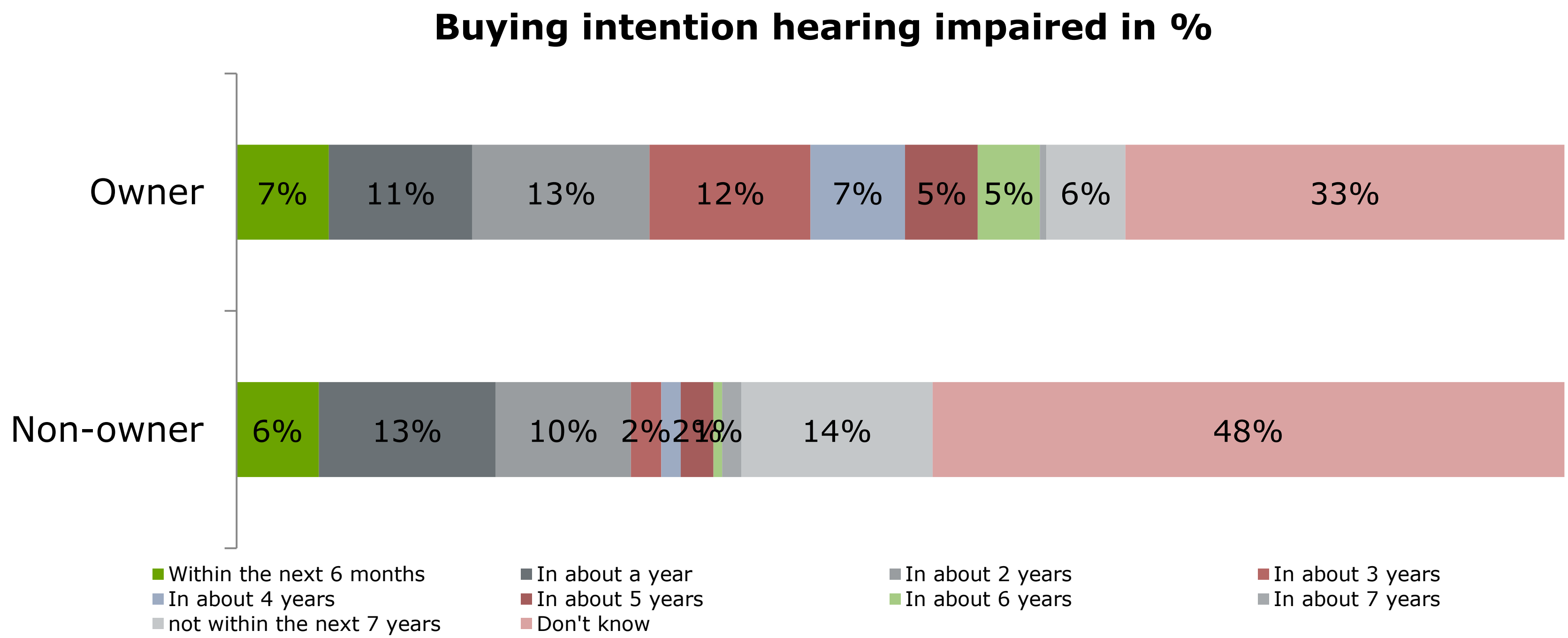
Hearing impaired non-owners:
How often do you feel you are made fun of or rejected because your hearing loss?

Base: N=505

Base: Top 50% hearing loss, no hearing aid N=209

Buying intentions and most important triggers to buy

19% (2012:13%) of non-owners intend to get a hearing aid within the next year.

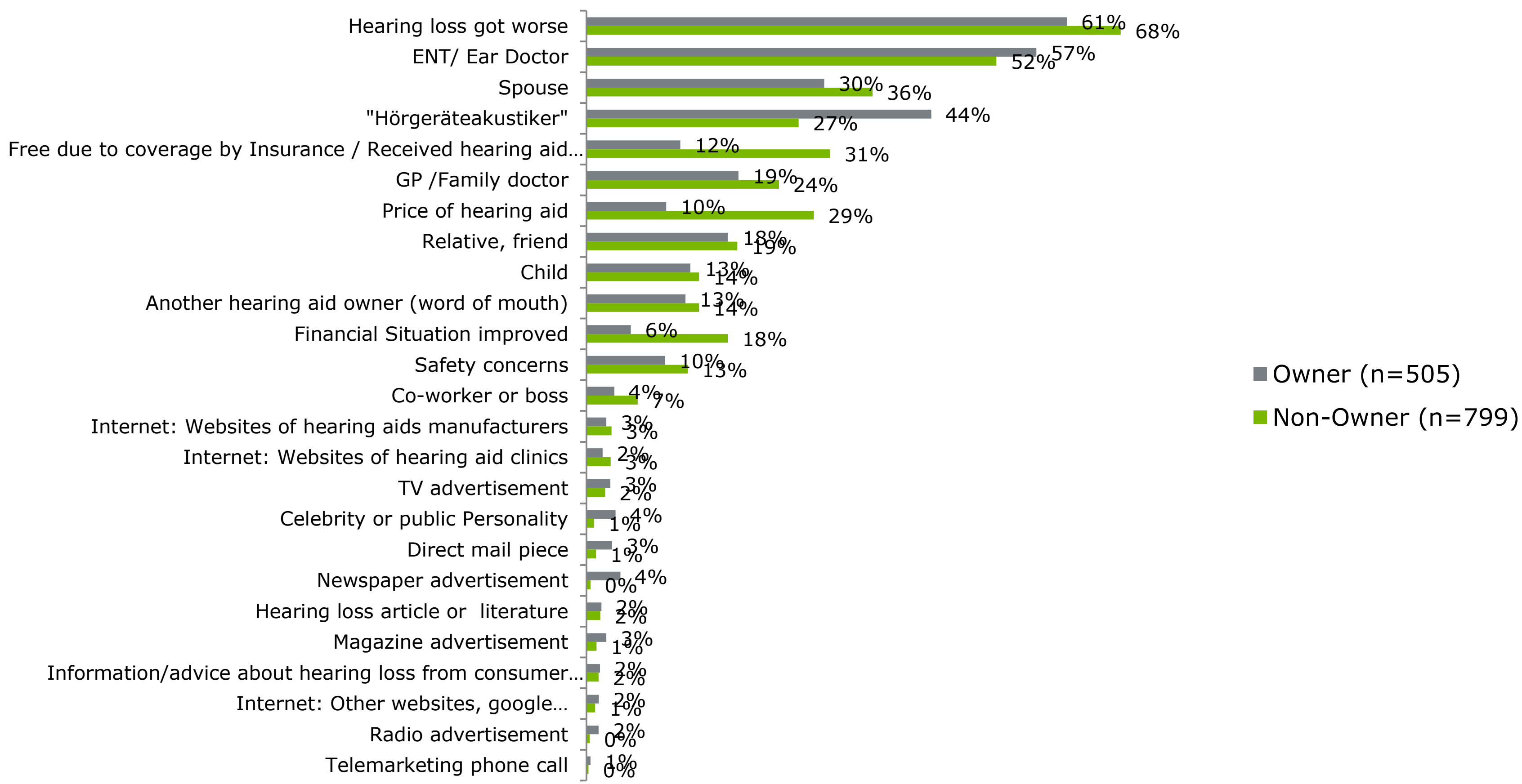


HA-non-owner, n=799
HA-owner, n=505

The most important influencing factors are worsening hearing loss, ENT/"Akustiker" and Spouse. Insurance coverage/price of hearing aids is much more relevant for the non owners.

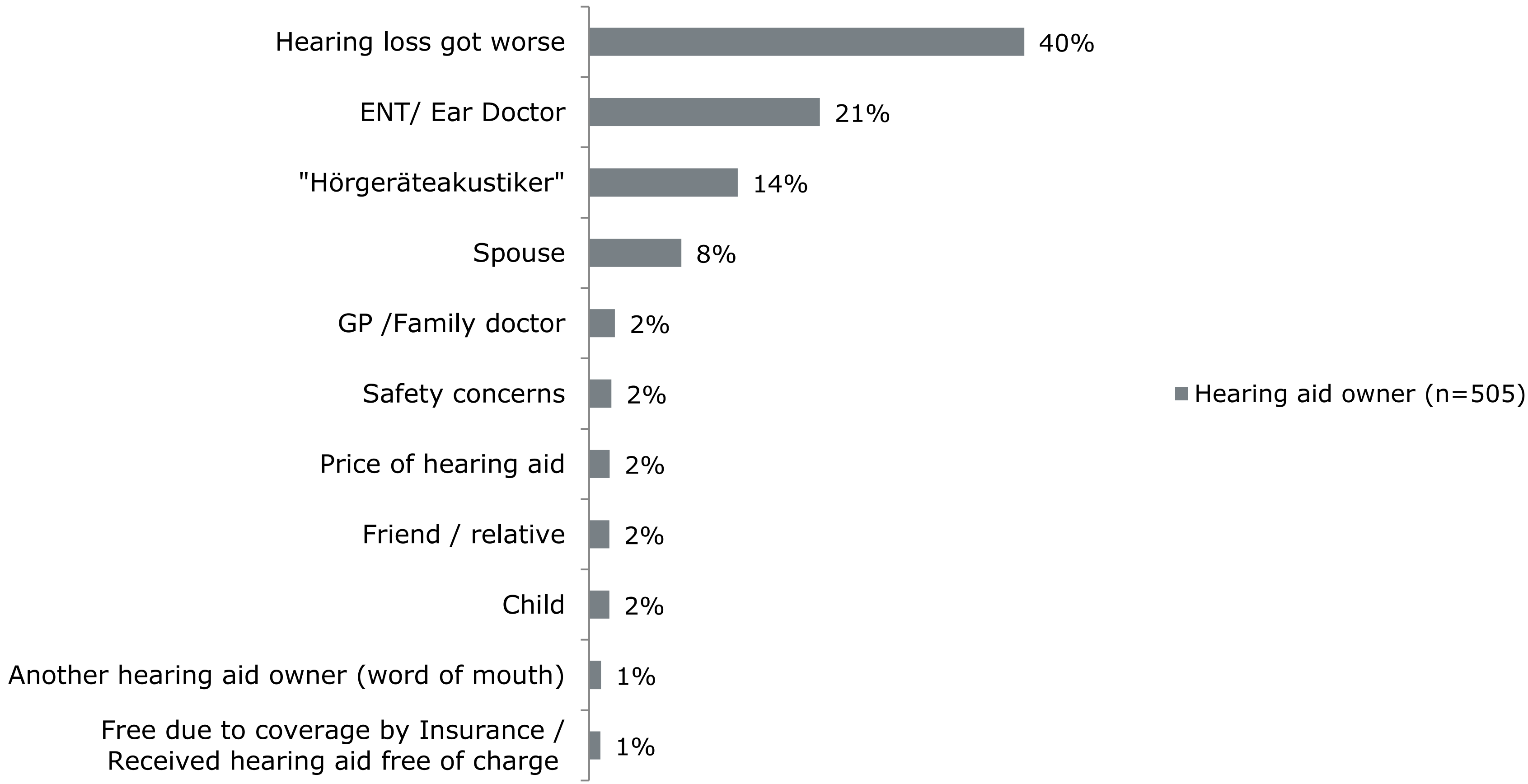
Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?

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 ?



The most important trigger to buy a hearing aid is worsening hearing loss and the ENT followed by “Akustiker” and spouse.

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



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APPENDIX

Sample size and random sample error: Rules of thumb

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

Sample size	Random sample error	
	Real value is within interval:	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
50	+- 13.9	+- 9.9
100	+- 9.8	+- 7.0
250	+- 6.2	+- 4.4
500	+- 4.4	**+- 3.1**
1000	+- 3.1	+- 2.2
5’000	+- 1.4	+- 1.0
10’000	+- 1.0	+- 0.7

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
Gender							
Male	6747	12.7%	33.1%		48.7%	52.5%	48.5%
Female	7028	11.6%	36.7%		51.3%	47.5%	51.5%
Age recoded							
1 - 14	1809	2.6%	33.8%		14.5%	2.9%	2.8%
15 - 24	1482	3.7%	28.4%		11.8%	3.6%	2.7%
25 - 34	1721	5.3%	32.9%		13.5%	5.6%	5.2%
35 - 44	1734	7.2%	15.5%		13.3%	9.8%	3.3%
45 - 54	2322	9.7%	17.7%		17.3%	17.2%	6.9%
55 - 64	1837	15.0%	29.2%		12.9%	17.9%	13.8%
65 - 74	1461	23.0%	35.5%		9.4%	19.4%	20.0%
74+	1408	36.9%	50.7%		7.3%	23.6%	45.3%
Type of household							
single household	1902	19.0%	42.3%		12.7%	19.2%	26.3%
Couple, no kids	4462	16.4%	35.3%		30.9%	43.1%	44.0%
Couple with kid(s)	5453	6.9%	26.0%		41.9%	25.6%	16.8%
Single mom/dad with kid(s)	702	5.8%	10.0%		5.5%	3.4%	0.7%
Retirement home, hospital etc.	135	39.2%	48.5%		0.7%	2.5%	4.4%
Other	1121	10.1%	40.3%		8.3%	6.2%	7.8%

* Small sample sizes in some categories

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
Status							
The head of the household (alone or together with someone)	6652	16.3%	35.0%		46.5%	66.1%	68.0%
The spouse of the head of the household	3304	11.8%	31.2%		24.3%	25.2%	21.8%
Daughter/son of head of household	2896	2.2%	24.3%		23.6%	4.6%	2.8%
Other Person	762	11.1%	48.3%		5.6%	4.1%	7.4%
Employment							
Full time employed	4854	9.0%	19.8%		43.1%	33.3%	15.4%
Part time employed	1445	8.6%	26.0%		12.9%	8.8%	5.8%
Unemployed / not working	839	8.2%	34.0%		7.5%	4.3%	4.2%
Retired under a disability pension scheme (fully or partly)	202	15.3%	38.5%		1.7%	1.8%	2.1%
Early retired under an early retirement benefit scheme	1358	25.5%	42.3%		9.9%	18.8%	25.6%
Retired (at the official retirement age)	1960	29.4%	45.3%		13.6%	29.7%	45.7%
Student / pupil / in training	1208	3.4%	17.1%		11.4%	3.3%	1.3%
Education							
Hauptschule	1606	20.7%	41.4%		12.4%	18.5%	24.3%
Mittlere Reife (Realschule)	2435	10.8%	33.0%		21.2%	16.7%	15.3%
Abitur/Fachabitur	1693	8.3%	35.4%		15.1%	8.6%	8.8%
Lehrabschluss/Anlehre	2606	16.3%	36.8%		21.3%	25.4%	27.6%
Höhere Berufsausbidlung (Techniker, Meister o.Ä.)	792	16.2%	28.1%		6.5%	8.6%	6.2%
Fachhochsulabschluss	887	14.3%	29.0%		7.4%	8.5%	6.4%
Universitätabschluss	1494	11.1%	27.5%		13.0%	11.4%	8.0%
Anderes	351	12.2%	43.3%		3.0%	2.3%	3.3%

* Small sample sizes in some categories