Results

ChinaTrak 2020

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

ChinaTrak 2020 is part of the EuroTrak studies:

ChinaTrak 2020 was designed and executed by Anovum (Zurich) on behalf of EHIMA.

Sample sizes China 2020:
Representative sample (sample 1): N=13'696 people
Hearing impaired (sample 2):
HA owners*: N=880 people
Hearing impaired non-owners: N=409 people

* due to low HA adoption, Boost interviews with hearing aid owners were conducted; hearing impaired sample was weighted based on rep sample
Summary
2. Market overview

- **Stated hearing loss prevalence**
  - Total: 5.8%, 18+: 7.2%
  - Binaural hearing loss: HA owners: 42%, HA non-owners: 49%
  - Hearing Tests: 18% had a hearing test in the last 5 years, most tests done in hospitals

- **Hearing aid adoption rate (HA penetration)**
  - Total: 10.3%
  - Total age group 18+: 10.2%
  - 35% of HA owners have binaural treatment

- **The route to the hearing aid**
  - 33% of the hearing impaired discussed hearing loss with an ENT doctor in hospital (drop out=67%).
  - 21% got hearing aids recommended from the ENT (drop out=36%).
  - 18% of ENT consultations referred to an audiologist, 54% recommended to get a hearing aid, 35% 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

- Hearing aid ownership, usage and accessories
  - 66% of the currently owned HAs were bought in 2018 or later.
  - The average age of the currently owned HAs is 3.0 years.
  - The median age of hearing aids before replacement is 3 years.
  - On average, HAs are worn 6.9 hours a day.
  - 54% of today’s hearing aid owners are aware of their hearing aid brand.
  - 50% have been informed about hearing aid accessories by the audiologist, 28% use a HA accessory.

- Importance of listening situations and satisfaction with HAs
  - 95% of the hearing aid owners say their hearing aid works better than or as expected
  - 92% 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, talking to children and talking on a phone are the most important listening situations.

- Positive impact of HAs
  - Significant positive impact of HAs on different aspects: Especially communication effectiveness, mental/emotional health and feelings about oneself improve with hearing aids.
  - All 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**
  - The main reasons for not using hearing aids are that they think that hearing aids do not restore hearing to normal, another hearing aid owner’s opinion, hearing loss is not severe enough, they think that hearing aids are uncomfortable, social / family opinion such as child, spouse, friend and they have more serious priorities.
  - 0% who own hearing aids don’t use them at all (0 hours); 4% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**
  - 47% of hearing aid owners feel that people never 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 (only 27% say they are never made fun of because of their hearing loss).
  - The most important influencing factors for getting hearing aids are worsening hearing loss, children, the ENT, relatives/friends, safety concerns, spouse, price and the audiologist.
Detailed Results: Roadmap

1. **Introduction**
   - Organisation of ChinaTrak 2020
   - Recruitment process: In search of hearing impaired people

2. **Market overview**
   - Prevalence of hearing loss and hearing aid adoption rate
   - Hearing tests and where hearing is tested
   - The route to the hearing aid: Sources of information and drop-out rates
   - Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities

3. **Analysis of hearing aid owners**
   - Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
   - Reasons for getting hearing aids sooner
   - Channels for getting hearing aids, recommendation of channel (NPS)
   - Awareness and usage of accessories
   - Satisfaction with hearing aids and drivers
   - Importance of listening situations
   - Positive impact of hearing aids, safety due to hearing aids, quality of life

4. **Analysis of hearing impaired non-owners**
   - Reasons for not having hearing aids
   - Social rejection because of hearing loss compared to the acceptance of hearing aids
   - Most important triggers to buy

5. **Appendix**
   - Demographics: Hearing instrument adoption rates and populations
1. Introduction
Organisation of ChinaTrak 2020

Organisation
- Principal of the project ChinaTrak is EHIMA.
- Anovum Zurich developed the concept of ChinaTrak, designed the questionnaire and conducted the fieldwork in cooperation with a fieldwork company in China. Furthermore, Anovum analysed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire.

Use of the data
- EHIMA may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.

- The raw dataset remains at Anovum. If the principal uses the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
  "Source: Anovum – ChinaTrak/2020/N=[relevant sample size]"

- Member companies of the principal can ask Anovum to further analyse the raw data in specific ways at their own expense.

- Member companies of the principal can order a report with satisfaction scores for their brand (if feasible). 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 principal's company.

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Seite 8
Recruitment process: In search of hearing impaired people

**Step 1: Screening interviews**

Objective: Prevalence of hearing loss and hearing aid ownership

Process:
1. Selection of 14 tier 1-3 cities, recruitment of survey participants on the street (F2F). The recruitment followed a strict sampling plan according to the age & gender distribution in each of the regions.
2. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
3. Result: Representative sample of N=13'696 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. Boost interviews of hearing aid owners: due to the low HA adoption in China, a targeted F2F recruitment approach, with recruiters looking for hearing aid owners was used (the boost interviews took place in the same 14 selected cities as the representative sample).
3. Balancing through weighting according to representative screening interviews
4. Resulting sample: N=471 hearing aid owners and N=409 hearing impaired non-owners
# Selected Tier 1-3 cities

<table>
<thead>
<tr>
<th>Tier</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 1</td>
<td>Beijing</td>
</tr>
<tr>
<td></td>
<td>Shanghai</td>
</tr>
<tr>
<td></td>
<td>Guangzhou</td>
</tr>
<tr>
<td>Tier 2</td>
<td>Hangzhou</td>
</tr>
<tr>
<td></td>
<td>Nanjing</td>
</tr>
<tr>
<td></td>
<td>Chengdu</td>
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<td></td>
<td>Zhengzhou</td>
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<tr>
<td></td>
<td>Taiyuan</td>
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<td></td>
<td>Nanning</td>
</tr>
<tr>
<td>Tier 3</td>
<td>Mianyang</td>
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<tr>
<td></td>
<td>Guiyang</td>
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<tr>
<td></td>
<td>Jilin</td>
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<td></td>
<td>Baoding</td>
</tr>
<tr>
<td></td>
<td>Lanzhou</td>
</tr>
</tbody>
</table>
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age
Hearing loss prevalence China 2020
Self stated hearing loss

% hearing loss prevalence

- Total: 5.8%
- Total 18+: 7.2%
- 74+: 43.4%
- 65-74: 20.6%
- 55-64: 10.4%
- 45-54: 4.7%
- 35-44: 0.9%
- 25-34: 0.5%
- 15-24: 0.4%
- <=14: 0.3%

Base: 13'696

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Overview hearing loss prevalence and hearing aid adoption

ChinaTrak 2020

- Hearing impaired (stated): 5.8%
- Adoption (% of population): 0.6%
- Adoption (% of stated impaired): 10.3%
Hearing aid adoption rate: 10% of hearing impaired have hearing aid(s), 35% of them have binaural treatment

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Hearing loss sextile-groups

0%  2%  7%  5%  16%  41%
100% 98% 93% 95% 84% 59%
0%  10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

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

* 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 characteristics: Owners compared to non-owners

<table>
<thead>
<tr>
<th>Ears Impaired (stated)</th>
<th>HA-Non-owner</th>
<th>HA Owner</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unilateral loss</td>
<td>51%</td>
<td>58%</td>
<td>12%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>49%</td>
<td>42%</td>
<td>10%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Perceived loss</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mild</td>
<td>72%</td>
<td>15%</td>
<td>3%</td>
</tr>
<tr>
<td>Moderate</td>
<td>25%</td>
<td>50%</td>
<td>20%</td>
</tr>
<tr>
<td>Severe</td>
<td>3%</td>
<td>30%</td>
<td>58%*</td>
</tr>
<tr>
<td>Profound</td>
<td>1%</td>
<td>4%</td>
<td></td>
</tr>
</tbody>
</table>

* combined “severe” and “profound” because n is too small
Hearing tests and where hearing is tested
Hearing Tests: 18% had a hearing test in the last 5 years, most tests done in the hospital, followed by hearings screening during community social activities

Have you ever taken a hearing test?
- Yes, in the last 12 months: 8%
- Yes, in the last 1-5 years: 10%
- Yes, more than 5 years ago: 15%
- No, never: 67%

Where/how was your hearing tested?
- Hospital: 69%
- Hearing screening test during community social activities: 30%
- Hearing Care Professional: 5%
- Online test / smartphone app: 2%
- Other: 6%
- Don't know: 0%
The route to the hearing aid: Sources of information and drop-out rates
ENTs/HCPs are the most important sources of information and therefore the major gatekeepers.

Where did you gather information about hearing aids?

- **Ear doctor (ENT), Audiologist**: 30% (78%)
- **Conversations with friends, relatives already fitted with a hearing aid**: 24% (49%)
- **Internet research combined**: 26% (49%)
  - Internet research: websites of hearing aids manufacturers: 10% (14%)
  - Internet research: websites of hearing aid clinics: 10% (14%)
  - Internet research: other websites, Baidu and E-commerce platform (Tmall, Taobao): 9% (14%)
- **Articles in magazines or newspapers**: 23% (14%)
- **Print ads received in your mailbox**: 24% (16%)
- **Other**: 8% (16%)
- **I did not gather information about hearing aids**: 8% (53%)

Legend:
- Hearing loss Total (n=880)
- Hearing aid (n=471)
- Hearing loss but no hearing aid (n=409)
The route to the hearing aid

Base: N=880
Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*

Low 50% hearing loss*

* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:
  - Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
  - Scores on 6 APHAB-EC - like questions (Scaled 1-5)
  - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).
The route to the hearing aid: ENT
Have you ever discussed your hearing problem in a hospital with an ear doctor (ENT)?

% Discussed with ENT

- Total hearing impaired: 33%
- HA owner: 85%
- Hearing impaired non-owners: 26%

What did he/she recommend?

HA owner (Base: 402)
- Did prescribe a hearing aid: 95%
- Referred to an audiologist: 28%
- Recommended no further action: 0%

Impaired non-owner (Base: 101)
- Did prescribe a hearing aid: 38%
- Referred to an audiologist: 13%
- Recommended no further action: 48%
The route to the hearing aid: audiologist
Have you ever discussed your hearing problem with an audiologist?

% Discussed with audiologist

- Total hearing impaired: 21%
- HA owner: 88%
- Hearing impaired non-owners: 13%

What did he/she recommend?

**HA owner (Base: 399)**
- Recommended to get a hearing aid: 100%
- Recommended not to get a hearing aid: 0%

**Impaired non-owner (Base: 44)**
- Recommended to get a hearing aid: 69%
- Recommended not to get a hearing aid: 31%
Recommendations by profession

- **ENT/hospital (N=503)**
  - Referred to an audiologist: 18%
  - Recommended to get a hearing aid: 54%
  - Recommended no further action: 35%

- **Audiologist (N=443)**
  - Referred to an audiologist: 83%
  - Recommended to get a hearing aid: 17%
  - Recommended no further action: 0%
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities
Work competitiveness: 99% 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?

- 59% Of significant use
- 40% Of some use
- 1% Of no use

Base: N=110
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 loss, no hearing aid =371/ hearing aid N=437
General health problems: Risk of being depressed (PHQ-2 Screening) for HA owners is similar compared to impaired non-owners (Top50% hearing loss group*).

Depression symptoms:
PHQ-2 Screening:
In the last 2 weeks:
- Little interest or pleasure
- Feeling down, depressed, hopeless

Base: hearing aid N=422 / top 50% HL, no hearing aid =53 (low sample size!)

*Construction of 6-groups: A factor analysis was performed to identify one factor “degree of hearing loss”. The following questions were included in the factor:
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).
General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top50% hearing loss group*), hearing aid owners feel slightly less exhausted in the evenings.

*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).

Base: hearing aid N=421 / top 50% HL, no hearing aid =43 (low sample size!)
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?

- Top 50% hearing loss, no hearing aid (n=53)
  - 39% No
  - 61% Yes

- Hearing aid (n=422)
  - 34% No
  - 66% Yes
29% of all hearing impaired think that hearing loss could be linked to sleeping disorder, 26% to depression.

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

- Sleeping disorder: 29%
- Depression: 26%
- Dementia: 20%
- High blood pressure: 15%
- Poor eyesight: 12%
- Diabetes: 11%
- Back problems: 8%
- Hearing loss is not linked to any of those health issues: 49%
3. Analysis of hearing aid owners
Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
Low adoption rates within mild hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profound</td>
<td>(1%)</td>
<td>0% 0%</td>
</tr>
<tr>
<td>Severe</td>
<td>(6%)</td>
<td>2% 3%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(28%)</td>
<td>23% 5%</td>
</tr>
<tr>
<td>Mild</td>
<td>(65%)</td>
<td>64% 2%</td>
</tr>
</tbody>
</table>

Adoption rates:
- 0% for Profound
- 2% for Severe
- 23% for Moderate
- 64% for Mild
- 58%* for Severe
- 20% for Moderate
- 3% for Mild

Adoption rates are based on a sample of 880 individuals.

Sums can differ from 100% due to rounding.

* combined “severe” and “profound” because n is too small.
66% of the currently owned HAs were acquired in 2018 or later

Age of currently owned HAs (Mean): 3.0 years

Year of purchase
85% of current users are first time users. More than 50% claim that they purchased hearing aids within 1 year of becoming aware of the hearing loss.

Current HAs = first HAs?

- Yes: 85%
- No: 15%

HA-owner, N=471

How many years did you own your previous HAs?

- 1-3 years: 73%
- 4-6 years: 25%
- 7-10 years: 0%
- 11 years or longer: 0%

Age of HA before it has been replaced: 3 years (median)

Base: N=69

Thinking back before you acquired your first hearing aid: How many years have passed since you became aware of your hearing loss until you acquired a hearing aid?

- 1 year: 54%
- 2 years: 29%
- 3 years: 14%
- 4-6 years: 0%
- more than 6 years: 0%

Base: N=370
Thinking back before you obtained your first hearing aid(s): do you think, you should have gotten them sooner?

- Yes: 73%
- No: 27%

Base: N=471

HA-owner, N=471

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

- Better mental/emotional health: 73%
- Better social life: 72%
- Less fatigue in the evening: 39%
- Better performance at work: 22%
- Other opportunity: 3%

71% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on better mental/emotional health and social life.

Base: N=346
Almost no hearing aid owners received hearing aids as a government give away, also awareness among non owners for those give aways is very low.

**Owners:** Did you receive your current hearing aids as a government give away?

- 3% Yes, for free
- 1% Yes, with a small fee
- 92% No
- 5% Don't know

**Non-owners:** Do you know that Chinese Government gives away hearing aids from time to time for free?

- 0% Yes
- 94% No
- 6% Don't know

HA-owner, n=471

HA-non-owners, n=409
Almost half of the hearing aid owners got them paid by their children.

Who paid for your hearing aids?

- Myself: 53%
- My children: 46%
- Other family member: 1%
- My parents: 0%
- Other: 0%

What's the price of your current hearing aids?
I case you wear 2 hearing aids, please consider the price of ONE.

- < ¥1,000: 11%
- ¥1,000-¥5,000: 36%
- ¥5,000-¥10,000: 33%
- ¥10,000-¥20,000: 13%
- ¥20,000-¥30,000: 3%
- >¥30,000: 2%
- not sure: 3%
Specialized hearing aid store is where most current hearing aids have been obtained (but: non owners would rather go to a hospital for HAs).

**OWNERS:**
Where was your most current hearing aid obtained?

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialized hearing aid store</td>
<td>71%</td>
</tr>
<tr>
<td>Hospital</td>
<td>22%</td>
</tr>
<tr>
<td>Online</td>
<td>4%</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>2%</td>
</tr>
<tr>
<td>Club store</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

*HA-owner, N=471*

**NON OWNERS:**
If you were to get hearing aids, where would you go?

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialized hearing aid store</td>
<td>35%</td>
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<td>1%</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>10%</td>
</tr>
<tr>
<td>Club store</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
</tr>
</tbody>
</table>

*HA-non-owner, N=409*
ENT/audiologist are by far the most important source of information for the HA purchase channel.

Where did you gather information when you selected the place to get your hearing aids?

- Hospital/ear doctor (ENT), Audiologist: 70%
- Conversations with friends/relatives already fitted with a hearing aid: 40%
- Just enter a hearing aid store: 34%
- Internet research: websites of hearing aid clinics: 17%
- Internet research: other websites, geolocation, Baidu and E-commerce platform (Tmall, Taobao): 17%
- Internet research: websites of hearing aids manufacturers: 14%
- Articles in magazines or newspapers: 8%
- Print ads received in your mailbox: 1%
- Other: 2%

HA-owner, N=471
Doctor referrals are most important when deciding on the purchase channel for hearing aids (also important: friendly fitters and friends suggestions)

Why did you purchase your hearing aids through this channel?

- **Doctors referred**: 50%
- **Fitters are very friendly**: 42%
- **Friends suggested**: 41%
- **Hassle free**: 20%
- **The shop is close to my home**: 18%
- **Price is cheaper**: 15%
- **Hearing aid is on promotional sales**: 9%
- **Other reason**: 3%

HA-owner, N=471

China specific question
Recommendation intention of the place where the hearing aid(s) have been obtained is okay, with a positive NPS score of 15.

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

0=not at all likely
0% 1% 2% 3% 4% 5% 6% 7% 8% 9% 10=
extremely likely

DETRACTORS
15%

PASSIVES
55%

PROMOTERS
30%

NPS = PROMOTERS – DETRACTORS = 15

HA-owner, N=471
Online purchase of hearing aids have been taken into consideration by 1 out of 4 current HA owners (and only 12% of the non owners).

**Owners:** Have you ever considered purchasing hearing aids online?

- Yes: 26%
- No: 74%

**Non-owners:** Have you ever considered purchasing hearing aids online?

- Yes: 12%
- No: 88%

HA-owner, n=461

HA-non-owners, n=404
On average, HAs are worn 6.9 hours a day

How many hours a day are HA worn?

- HA-worn: Mean: 6.9 hours/day
- In the drawer (0 hours): 0%

HA-owner, N=502

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54% of today’s hearing aid owners are aware of their hearing aid brand.

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

- 54% Yes, I know it by heart
- 14% No, but I could find out
- 32% No, and can't find out

HA-owner, N=471
28% of the HA owners use an accessory for their hearing aids. 88% 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=471)

- 50% Yes
- 23% No
- 27% don't know/no answer

Do you personally use accessories for your hearing aids (TV-Streamer/Apps/Remote Control/etc.)? (HA owners, N=471)

- 28% Yes
- 72% No

IF ACCESSORIES USED (N=128):
Overall, how satisfied with the performance of your accessory(s)?

- 9% very dissatisfied
- 9% dissatisfied
- 3% somewhat dissatisfied
- 22% neutral
- 60% somewhat satisfied
- 6% satisfied
- 6% very satisfied
Satisfaction with hearing aids and drivers
95% 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?

- Hearing aids work better than I expected: 52%
- Hearing aids work as I expected: 43%
- Hearing aids work worse than I expected: 5%

Base: N=471
Overall satisfaction with HA: 92% of hearing aid owners are satisfied with their hearing aid(s)

- Total HA-user: 92%
- 2018 or earlier: 93%
- 2017 or earlier: 91%
- HA worn up to 4 hrs/day: 72%
- HA worn 4-8 hrs/day: 94%
- HA worn more than 8 hrs/day: 99%

% Satisfied:
- 92%
- 93%
- 91%
- 72%
- 94%
- 99%

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Overall Satisfaction with HA: Country comparison

% of hearing aid owners satisfied

- China: 92%
- France: 82%
- Italy: 81%
- Belgium: 80%
- Switzerland: 80%
- New Zealand: 79%
- Poland: 79%
- Spain: 78%
- Germany: 76%
- UK: 74%
- Norway: 74%
- Netherlands: 73%
- Denmark: 71%
- Japan: 38%
Satisfaction with current hearing aids

<table>
<thead>
<tr>
<th>Category</th>
<th>% Dissatisfied</th>
<th>% Satisfied</th>
<th>% Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Audiologist</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of service during hearing aid fitting period</td>
<td>2%</td>
<td>93%</td>
<td></td>
</tr>
<tr>
<td>Professionalism of dispenser</td>
<td>2%</td>
<td>91%</td>
<td></td>
</tr>
<tr>
<td>Quality of dispensers counseling</td>
<td>3%</td>
<td>88%</td>
<td></td>
</tr>
<tr>
<td>Quality of service after purchase</td>
<td>3%</td>
<td>85%</td>
<td></td>
</tr>
<tr>
<td>Natural sounding</td>
<td>4%</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td>Clearness of tone and sound</td>
<td>3%</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td>The sense of direction of sound</td>
<td>3%</td>
<td>85%</td>
<td></td>
</tr>
<tr>
<td>Richness or fidelity of sound</td>
<td>4%</td>
<td>84%</td>
<td></td>
</tr>
<tr>
<td>Comfort with loud sounds</td>
<td>5%</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Reliability</td>
<td>2%</td>
<td>91%</td>
<td></td>
</tr>
<tr>
<td>Value (performance versus money spent)</td>
<td>5%</td>
<td>87%</td>
<td></td>
</tr>
<tr>
<td>Overall fit/ Comfort</td>
<td>3%</td>
<td>87%</td>
<td></td>
</tr>
<tr>
<td>Wireless function</td>
<td>3%</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td>Battery life</td>
<td>3%</td>
<td>85%</td>
<td></td>
</tr>
<tr>
<td>Managing whistling/feedback/buzzing</td>
<td>4%</td>
<td>85%</td>
<td></td>
</tr>
<tr>
<td>Ease of changing battery</td>
<td>2%</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>Visibility to others</td>
<td>6%</td>
<td>79%</td>
<td></td>
</tr>
</tbody>
</table>

% Dissatisfied = % very dissatisfied + % dissatisfied + % somewhat dissatisfied

% Satisfied = % somewhat satisfied + % satisfied + % very satisfied

HA-owner, N=471
Satisfaction with current hearing aids

Leisure activities
- Watching TV: 94%
- At home with family members: 93%
- On the telephone: 92%
- In a store, when shopping: 91%
- When talking to children: 91%
- Listening to Music: 91%

Outdoors
- Conversation in large groups: 89%
- Conversation with one Person: 88%
- Conversation in small groups: 88%

Use in noisy situations
- In a larger lecture hall (e.g., theater, concert hall,...): 85%
- In school or a classroom (as an observer or student): 84%
- At a movie theater: 81%

Listening situation

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

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HA-owner, N=471
Overall fit / Comfort and Reliability are the most important factors influencing satisfaction with current HA

Influence on overall satisfaction with HA*

<table>
<thead>
<tr>
<th>Audiologist</th>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of service after purchase</td>
<td>0.46</td>
</tr>
<tr>
<td>Quality of service during hearing aid fitting period</td>
<td>0.43</td>
</tr>
<tr>
<td>Quality of dispensers counseling</td>
<td>0.39</td>
</tr>
<tr>
<td>Professionalism of dispenser</td>
<td>0.38</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sound quality signal process.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural sounding</td>
<td>0.46</td>
</tr>
<tr>
<td>Richness or fidelity of sound</td>
<td>0.44</td>
</tr>
<tr>
<td>The sense of direction of sound</td>
<td>0.41</td>
</tr>
<tr>
<td>Comfort with loud sounds</td>
<td>0.41</td>
</tr>
<tr>
<td>Clearness of tone and sound</td>
<td>0.36</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product features</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall fit/Comfort</td>
<td>0.53</td>
</tr>
<tr>
<td>Reliability</td>
<td>0.49</td>
</tr>
<tr>
<td>Managing whistling/feedback/buzzing</td>
<td>0.44</td>
</tr>
<tr>
<td>Value (performance versus money spent)</td>
<td>0.42</td>
</tr>
<tr>
<td>Ease of changing battery</td>
<td>0.41</td>
</tr>
<tr>
<td>Visibility to others</td>
<td>0.39</td>
</tr>
<tr>
<td>Wireless function</td>
<td>0.39</td>
</tr>
<tr>
<td>Battery life</td>
<td>0.35</td>
</tr>
</tbody>
</table>

*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction, 1 means a maximal relationship. Read: Overall fit / Comfort is the most important criteria for satisfaction.
Important listening situations

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

- At home with family members: 55%
- When talking to children: 51%
- When talking on a phone: 40%
- In conversations with large groups: 37%
- In a store, when shopping: 30%
- Outdoors: 28%
- In conversations with 1 person: 27%
- During leisure activities (e.g., exercising, taking a walk...): 25%
- In noisy situations: 24%
- When watching TV with others: 23%
- In conversations with small groups: 20%
- In the workplace: 14%
- When riding in a car: 11%
- At a movie theater: 4%
- In a larger lecture hall (e.g., theater, concert hall, place...): 4%
- In school or a classroom (as an observer or student): 3%
- When listening to music: 3%

Hearing loss Total (n=880)
Hearing aid (n=471)
Hearing loss but no hearing aid (n=409)
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially communication effectiveness, mental/emotional health and feelings about oneself 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).

Overall ability to communicate more effectively in most situations
- a lot worse: 14%
- worse: 41%
- the same: 44%

Mental/emotional health
- a lot worse: 12%
- worse: 45%
- the same: 43%

Feelings about yourself
- a lot worse: 12%
- worse: 45%
- the same: 42%

Relationships at home
- a lot worse: 17%
- worse: 41%
- the same: 41%

Confidence in yourself
- a lot worse: 11%
- worse: 49%
- the same: 40%

Mental ability
- a lot worse: 11%
- worse: 49%
- the same: 39%

Social life
- a lot worse: 14%
- worse: 47%
- the same: 38%

Sense of safety
- a lot worse: 12%
- worse: 50%
- the same: 37%

Sense of independence
- a lot worse: 16%
- worse: 47%
- the same: 36%

Physical health
- a lot worse: 18%
- worse: 47%
- the same: 34%

Ability to participate in group activities
- a lot worse: 0%
- worse: 16%
- the same: 48%

Relationships at work
- a lot worse: 4%
- worse: 22%
- the same: 44%
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss

% of HA owners feeling better/a lot better

Low 50% hearing loss (n=48)  Top 50% hearing loss (n=391)
Most hearing aid owners feel more confident moving in a city since wearing hearing aids!

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

- 90% Yes
- 10% No

Base: N=471
Also 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?

- Communication with Person: 6% a lot worse, 23% worse, 37% the same, 33% better, 6% a lot better
- Personal relationship with Person: 6% a lot worse, 27% worse, 42% the same, 27% better
- Social activities together with Person: 6% a lot worse, 33% worse, 37% the same, 23% better
- Quarrels/disputes with Person: 12% a lot worse, 40% worse, 37% the same, 11% better

Someone in HH / parent has HA, N=98
All 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?

- Never: 65%
- Rarely: 8%
- Occasionally: 27%
- Regularly: 0%

Base: N=471
4. Analysis of hearing impaired non-owners
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

<table>
<thead>
<tr>
<th>Perceived loss</th>
<th>HA Owner N=471</th>
<th>HA-Non-owner Low 50% HL N=199</th>
<th>Non-owner Top 50% HL N=156</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mild</td>
<td>15%</td>
<td>98%</td>
<td>42%</td>
</tr>
<tr>
<td>Moderate</td>
<td>50%</td>
<td>2%</td>
<td>52%</td>
</tr>
<tr>
<td>Severe</td>
<td>30%</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Profound</td>
<td>4%</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

More similar hearing loss-structure
Top 10 reasons for not having a hearing aid (I/II)

- **They do not restore your hearing to normal**: 46% Reason, 38% Somewhat a reason, 17% Not a reason
- **Another hearing aid owners opinion**: 46% Reason, 36% Somewhat a reason, 18% Not a reason
- **Hearing loss not severe enough**: 58% Reason, 23% Somewhat a reason, 19% Not a reason
- **Uncomfortable**: 52% Reason, 27% Somewhat a reason, 21% Not a reason
- **Social / Family opinion such as child, spouse, friend**: 46% Reason, 33% Somewhat a reason, 21% Not a reason
- **Have more serious priorities**: 46% Reason, 33% Somewhat a reason, 21% Not a reason
- **Have hearing loss in only one ear**: 45% Reason, 33% Somewhat a reason, 23% Not a reason
- **They do not work well in noisy situations**: 49% Reason, 27% Somewhat a reason, 24% Not a reason
- **ENTs opinion in hospital**: 45% Reason, 32% Somewhat a reason, 24% Not a reason
- **Hear well enough in most situations**: 39% Reason, 38% Somewhat a reason, 24% Not a reason

Base: non owners Top 50% HL: N=156
<table>
<thead>
<tr>
<th>Reason</th>
<th>Reason</th>
<th>Somewhat a reason</th>
<th>Not a reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audio logists opinion</td>
<td>43%</td>
<td>33%</td>
<td>24%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>38%</td>
<td>36%</td>
<td>25%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>32%</td>
<td>40%</td>
<td>27%</td>
</tr>
<tr>
<td>Had surgery - hearing aids wont help</td>
<td>45%</td>
<td>24%</td>
<td>31%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>43%</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>38%</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>38%</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>38%</td>
<td>26%</td>
<td>36%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>31%</td>
<td>33%</td>
<td>36%</td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td>28%</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>Do not trust audiologist</td>
<td>25%</td>
<td>35%</td>
<td>40%</td>
</tr>
<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>30%</td>
<td>28%</td>
<td>42%</td>
</tr>
<tr>
<td>Bad design</td>
<td>27%</td>
<td>29%</td>
<td>44%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>26%</td>
<td>31%</td>
<td>44%</td>
</tr>
<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>23%</td>
<td>29%</td>
<td>48%</td>
</tr>
<tr>
<td>Cannot afford a hearing aid</td>
<td>23%</td>
<td>25%</td>
<td>52%</td>
</tr>
</tbody>
</table>
Social rejection because of hearing loss compared to the acceptance of hearing aids
47% of hearing aid owners feel that people never 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?

- Never: 47%
- Rarely: 3%
- Occasionally: 16%
- Regularly: 35%

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

- Never: 27%
- Rarely: 24%
- Occasionally: 8%
- Regularly: 41%

Base: N=471
Base: Top 50% hearing loss, no hearing aid N=156
Most important triggers to buy
The most important influencing factors are worsening hearing loss, child, ENT, relatives/friends, safety concerns and spouse

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

**Non-owner:** What do you think would influence you to obtain/purchase a hearing aid?
The most important triggers to buy a hearing aid are the ENT, worsening hearing loss and child.

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

- Hospital / ENT (ear doctor): 24%
- Hearing loss gets worse: 23%
- Child: 14%
- Spouse: 7%
- Audiologist: 7%
- Safety concerns: 7%
- Friend / relative: 5%
- Price of hearing aid: 4%
- Another hearing aid owner (word of mouth): 2%
- Known/famous brand: 2%
- Information/advice about hearing loss: 2%
- Financial situation improved: 1%
- Co-worker or boss: 1%
- After sales service: 1%
Demographics (1) Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th>Gender</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>7031</td>
<td>5.6%</td>
<td>11.4%</td>
<td>51.4%</td>
<td>49.1%</td>
<td>54.8%</td>
</tr>
<tr>
<td>Female</td>
<td>6665</td>
<td>6.0%</td>
<td>9.3%</td>
<td>48.6%</td>
<td>50.9%</td>
<td>45.2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 14</td>
<td>2369</td>
<td>0.3%</td>
<td>25.0%</td>
<td>18.3%</td>
<td>0.8%</td>
<td>2.4%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1573</td>
<td>0.4%</td>
<td>21.0%</td>
<td>12.1%</td>
<td>0.8%</td>
<td>1.7%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>2235</td>
<td>0.5%</td>
<td>18.2%</td>
<td>17.2%</td>
<td>1.3%</td>
<td>2.5%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1886</td>
<td>0.9%</td>
<td>11.5%</td>
<td>14.5%</td>
<td>2.0%</td>
<td>2.3%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>2289</td>
<td>4.7%</td>
<td>5.3%</td>
<td>16.9%</td>
<td>14.1%</td>
<td>6.9%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1654</td>
<td>10.4%</td>
<td>9.7%</td>
<td>11.5%</td>
<td>21.8%</td>
<td>20.4%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1134</td>
<td>20.6%</td>
<td>12.8%</td>
<td>7.0%</td>
<td>28.6%</td>
<td>36.4%</td>
</tr>
<tr>
<td>74+</td>
<td>557</td>
<td>43.4%</td>
<td>9.4%</td>
<td>2.4%</td>
<td>30.7%</td>
<td>27.5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type of household</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>single household</td>
<td>798</td>
<td>16.6%</td>
<td>4.8%</td>
<td>5.2%</td>
<td>17.6%</td>
<td>7.7%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>1535</td>
<td>9.0%</td>
<td>6.7%</td>
<td>10.8%</td>
<td>18.0%</td>
<td>11.1%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>9995</td>
<td>4.2%</td>
<td>13.0%</td>
<td>74.3%</td>
<td>50.8%</td>
<td>65.5%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>255</td>
<td>4.9%</td>
<td>13.9%</td>
<td>1.9%</td>
<td>1.5%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>87</td>
<td>24.0%</td>
<td>3.5%</td>
<td>0.5%</td>
<td>2.8%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Other</td>
<td>1026</td>
<td>7.4%</td>
<td>13.6%</td>
<td>7.4%</td>
<td>9.2%</td>
<td>12.6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>The head of the household (alone or together with someone)</td>
<td>4360</td>
<td>7.8%</td>
<td>7.5%</td>
<td>31.2%</td>
<td>44.0%</td>
<td>30.9%</td>
</tr>
<tr>
<td>The spouse of the head of household</td>
<td>3363</td>
<td>4.4%</td>
<td>10.1%</td>
<td>24.9%</td>
<td>18.5%</td>
<td>18.0%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>4637</td>
<td>0.7%</td>
<td>17.3%</td>
<td>35.7%</td>
<td>3.7%</td>
<td>6.7%</td>
</tr>
<tr>
<td>Living-in with my grown up children</td>
<td>679</td>
<td>35.2%</td>
<td>13.6%</td>
<td>3.4%</td>
<td>29.0%</td>
<td>39.5%</td>
</tr>
<tr>
<td>Other person</td>
<td>658</td>
<td>5.8%</td>
<td>10.5%</td>
<td>4.8%</td>
<td>4.8%</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*

* Small sample sizes in some categories
Demographics (2) Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th>Employment</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full time employed</td>
<td>6'535</td>
<td>61.6%</td>
<td>18.4%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>568</td>
<td>5.2%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>665</td>
<td>5.5%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Hearing aid adoption rate % (Base=hearing impaired)</td>
<td>3.8%</td>
<td>14.0%</td>
<td>26.9%</td>
</tr>
<tr>
<td>Hearing difficulty</td>
<td>2.1%</td>
<td>14.5%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Hearing aid</td>
<td>3.8%</td>
<td>47.2%</td>
<td>26.9%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>33</td>
<td>0.3%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>72</td>
<td>0.6%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>2'412</td>
<td>18.2%</td>
<td>64.8%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>896</td>
<td>8.6%</td>
<td>66.4%</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-education group</td>
<td>279</td>
<td>1.9%</td>
<td>11.8%</td>
</tr>
<tr>
<td>Primary School</td>
<td>812</td>
<td>5.7%</td>
<td>28.0%</td>
</tr>
<tr>
<td>Middle School</td>
<td>1'822</td>
<td>15.4%</td>
<td>27.9%</td>
</tr>
<tr>
<td>High School</td>
<td>3'688</td>
<td>33.4%</td>
<td>27.5%</td>
</tr>
<tr>
<td>Bachelor degree or above</td>
<td>4'581</td>
<td>43.7%</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*

* Small sample sizes in some categories