

Results

KoreaTrak 2021

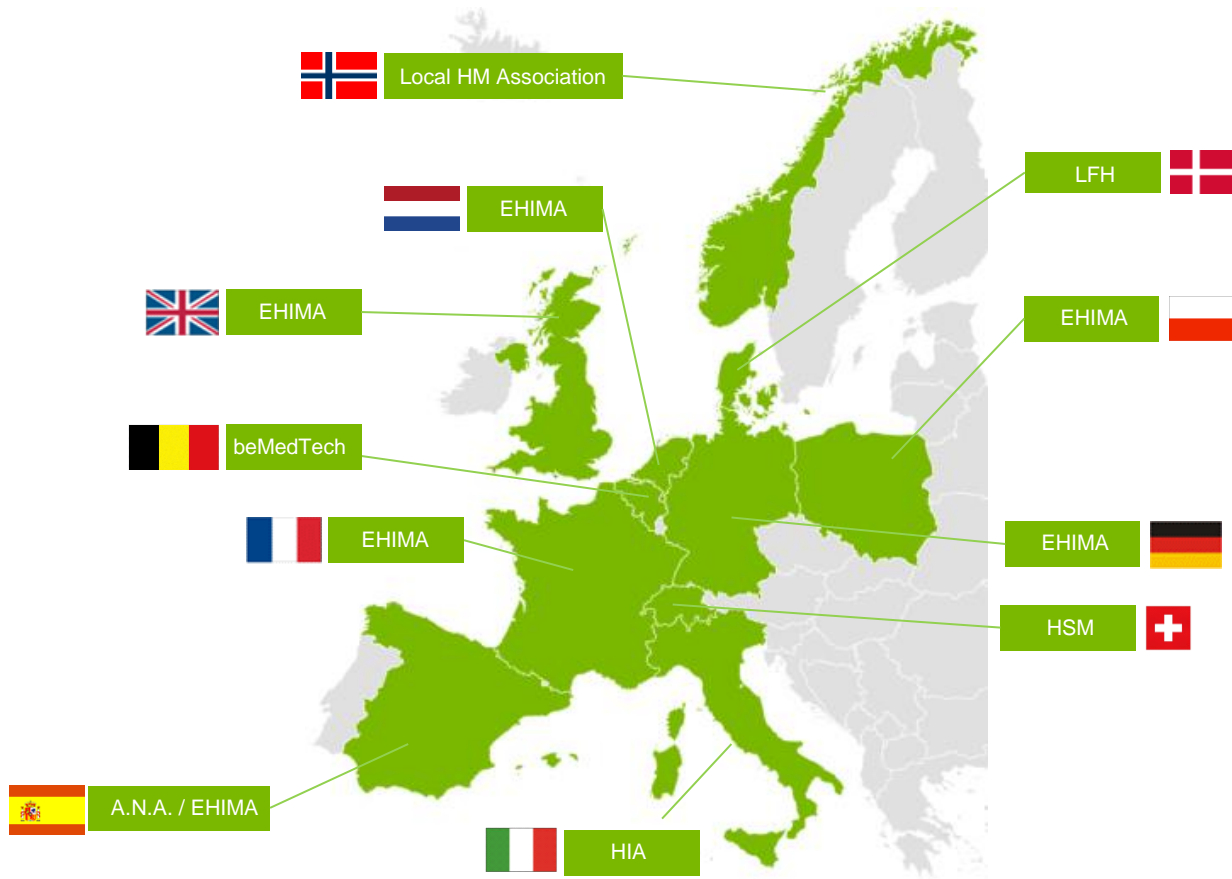


1. Introduction
2. Market overview
3. Analysis of hearing aid owners
4. Analysis of hearing impaired non-owners
5. Appendix

Summary

1. Introduction

KoreaTrak 2021 is part of the EuroTrak studies:



KoreaTrak 2021 was designed and executed by Anovum (Zurich) on behalf of KHIMA and EHIMA.

Sample sizes Korea 2021:

Representative sample (sample 1): N=15'785 people

Hearing impaired (sample 2):

N=1'002 people

HA owners:

N=400 people

Hearing impaired non-owners:

N=602 people



Summary

2. Market overview

- Stated hearing loss prevalence
 - Total: 5.9%, 18+: 6.6%
 - Binaural hearing loss: HA owners: 54%, HA non-owners: 42%
 - Hearing Tests: 64% had a hearing test in the last 5 years, most tests done by ENTs and family doctors
- Hearing aid adoption rate (HA penetration)
 - 36.6% of hearing impaired
 - 2.2% of total population
 - 51% of HA owners have binaural treatment
- The route to the hearing aid
 - 66% of the hearing impaired discussed hearing loss with an ENT or family doctor (drop out=34%).
 - 53% got hearing aids recommended from the ENT/family doctor (drop out=20%).
 - 64% of the GP consultations referred to an ENT. 6% recommended no action.
 - 42% of ENT consultations referred to an audiologist, 49% recommended to get a hearing aid, 23% 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
 - 67% of the currently owned HAs were acquired in 2019 or later.
 - The average age of the currently owned HAs is 3.0 years.
 - The median age of hearing aids before replacement is 5 years.
 - On average, HAs are worn 5.7 hours a day.
 - 49% of today's hearing aid owners are aware of their hearing aid brand.
 - 42% have been informed about hearing aid accessories/apps by the audiologist, 39% use a HA accessory/app.
- Importance of listening situations and satisfaction with HAs
 - 81% of the hearing aid owners say their hearing aid works better than or as expected
 - 57% of the HA owners are satisfied with their HAs, 19% are dissatisfied.
 - The more hours worn per day, the higher the satisfaction.
 - Satisfaction with newer hearing aids is higher than with older hearing aids.
 - Conversations with large groups, talking on the phone and talking at home with family members are the most important listening situations.
- Positive impact of HAs
 - Significant positive impact of HAs on different aspects: Especially communication effectiveness, confidence in yourself and sense of safety improve with hearing aids.
 - 97% of the 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 they are uncomfortable, don't want to admit to having hearing loss in public, hearing loss is not severe enough, another hearing aid owner's opinion, they do not work well in noisy situations, and they have hearing loss in one ear only.
 - 5% who own hearing aids don't use them at all (0 hours).
- Social rejection and triggers to buy
 - 32% 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 of or rejects a hearing-impaired without a hearing aid (only 24% say they are never made fun of because of their hearing loss).
 - The most important influencing factors for getting hearing aids are ENT, audiologist, worsening hearing loss (+price, insurance coverage especially for the non owners).

Detailed Results: Roadmap

1. Introduction

- Organisation of KoreaTrak 2021
- 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 KoreaTrak 2021

Organisation

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

Use of the data

- KHIMA / 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 – KoreaTrak/2021/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

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 100'000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **N=15'785** people based on census data.

Step 2: Target population interviews

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

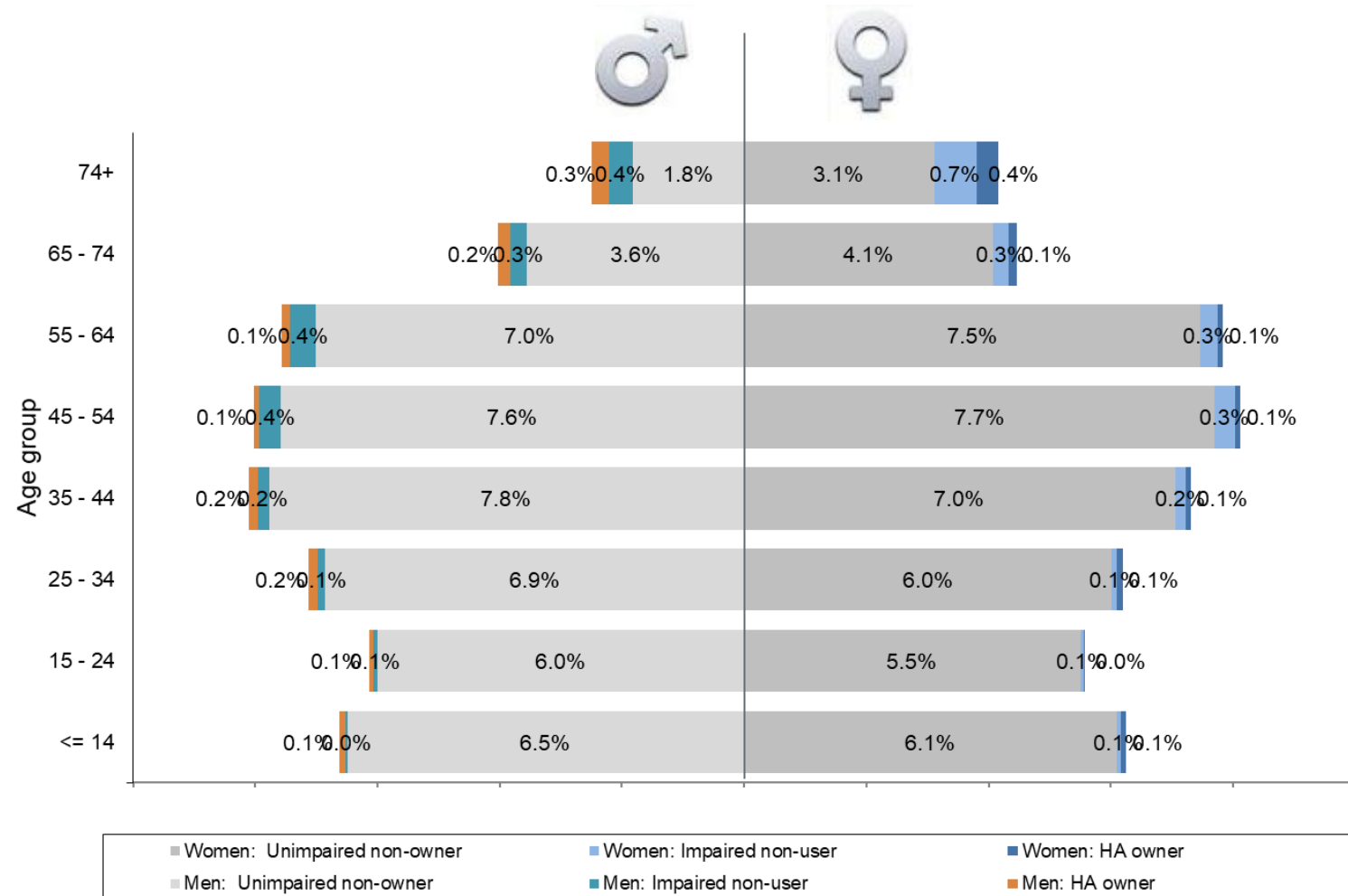
Process:

1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: **N=400** hearing aid owners and **N=602** hearing impaired non-owners

2. Market overview

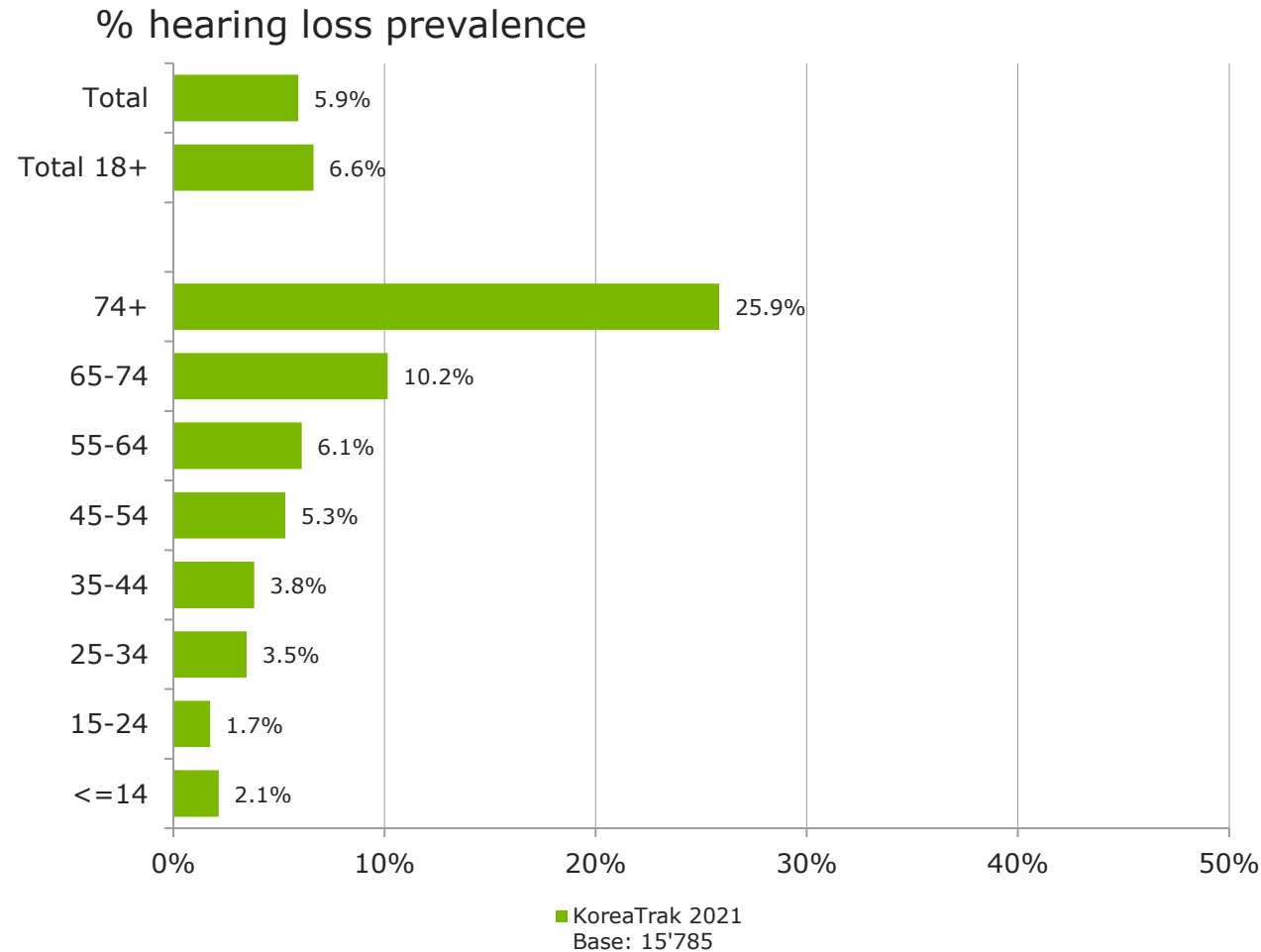
Prevalence of hearing loss and adoption rate

Hearing loss and hearing instrument ownership by gender/age

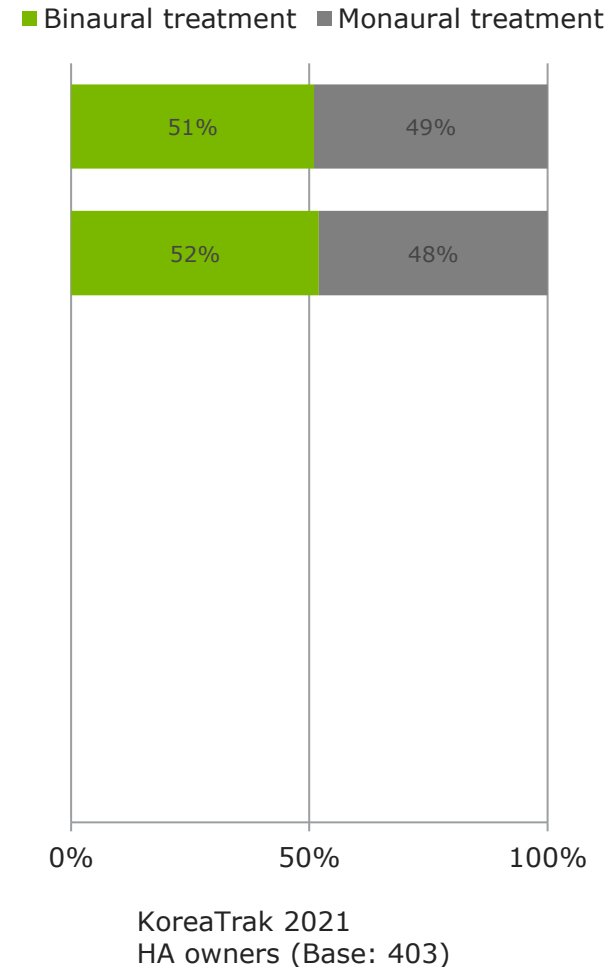
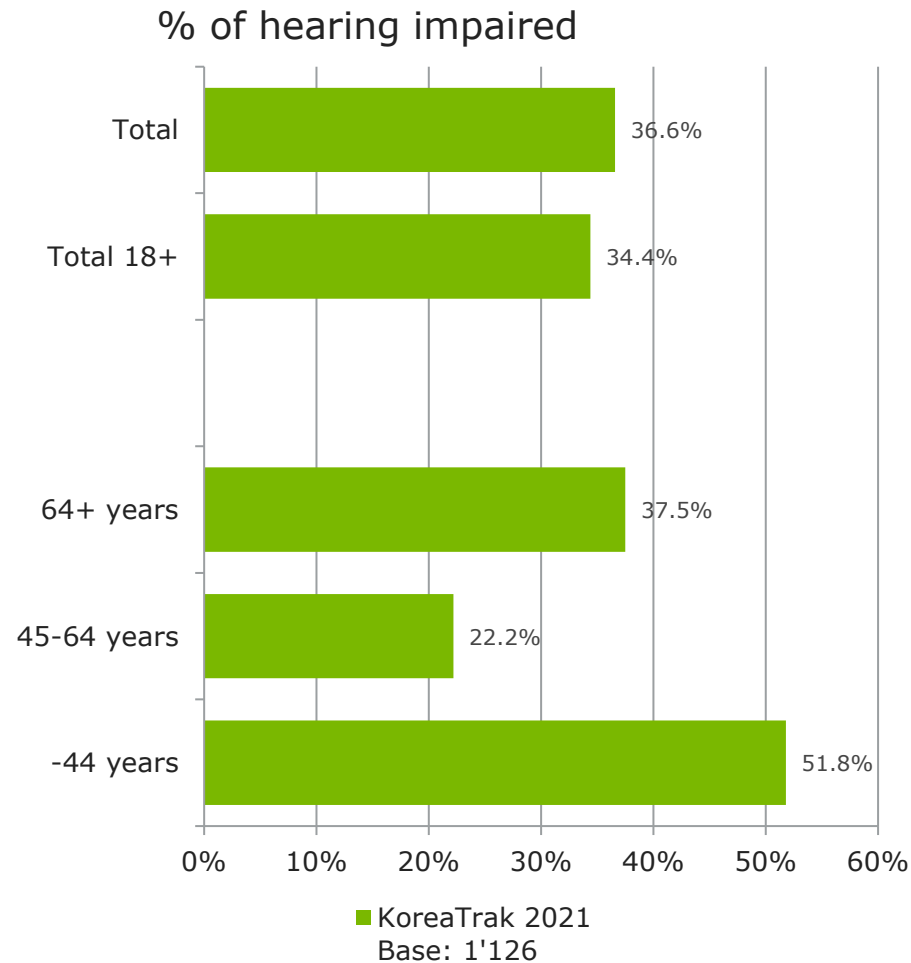


Hearing loss prevalence Korea 2021

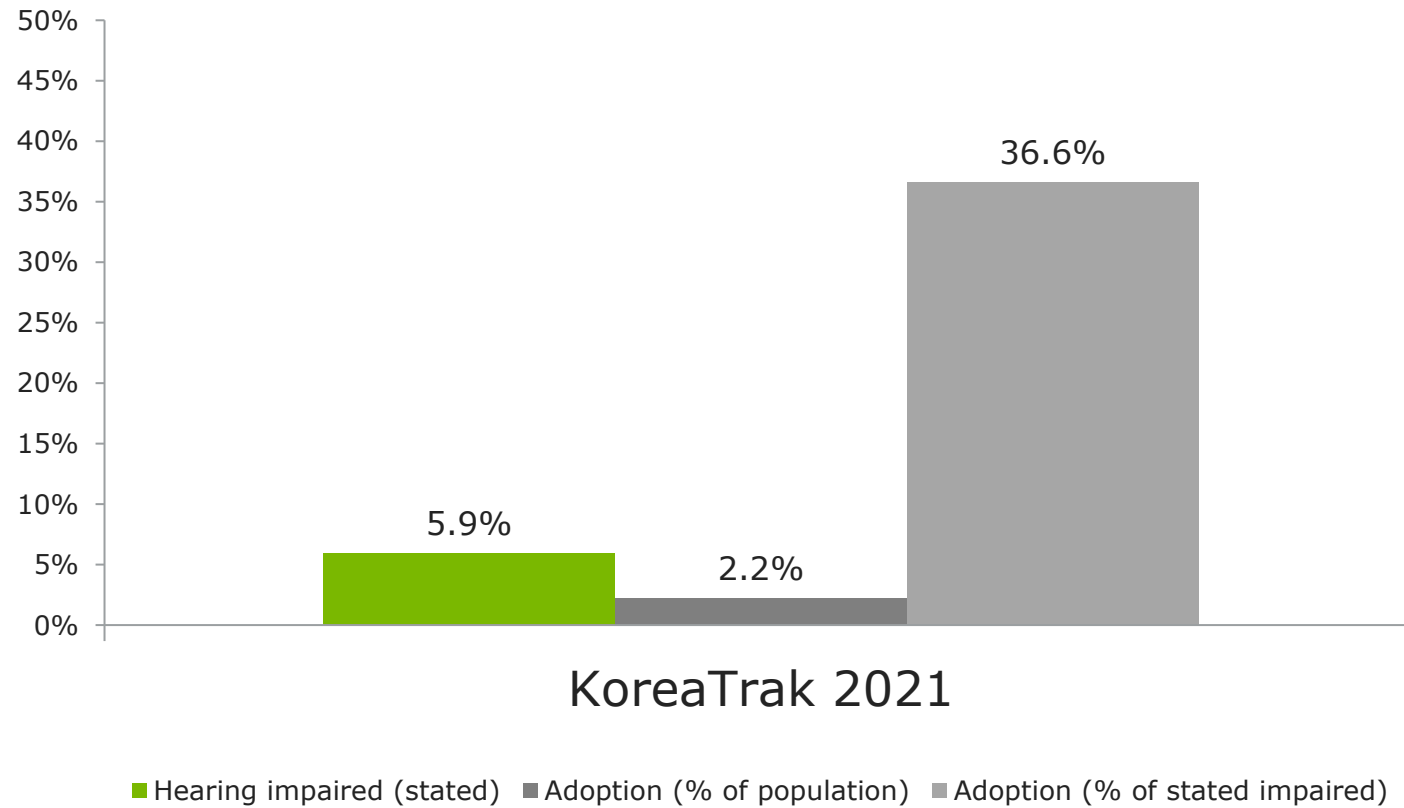
Self stated hearing loss



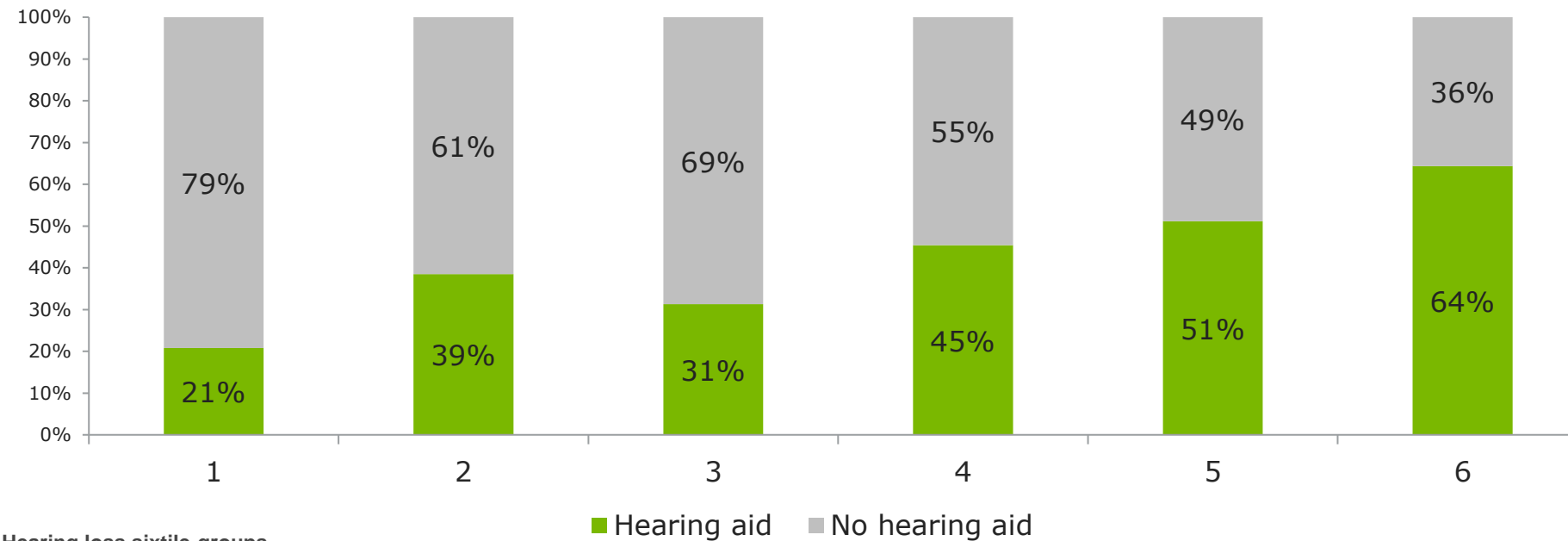
Hearing aid adoption rate: 37% of hearing impaired have hearing aid(s), 51% of them have binaural treatment



Overview hearing loss prevalence and hearing aid adoption



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



Hearing loss sixtile-groups

* 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	HA Owner	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	58%	46%	37%
Bilateral loss	42%	54%	48%
Perceived loss			
Mild	53%	23%	22%
Moderate	29%	40%	48%
Severe	15%	29%	58%*
Profound	3%	7%	

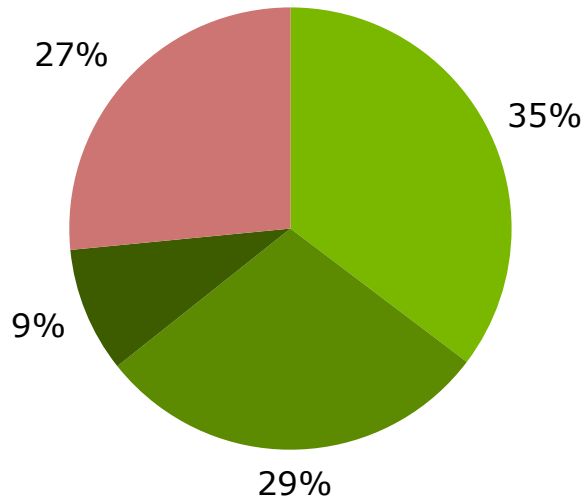
* combined "severe" and "profound" because n is too small

Hearing tests and where hearing is tested

Hearing Tests: 64% had a hearing test in the last 5 years, most tests done by ENTs and family doctors

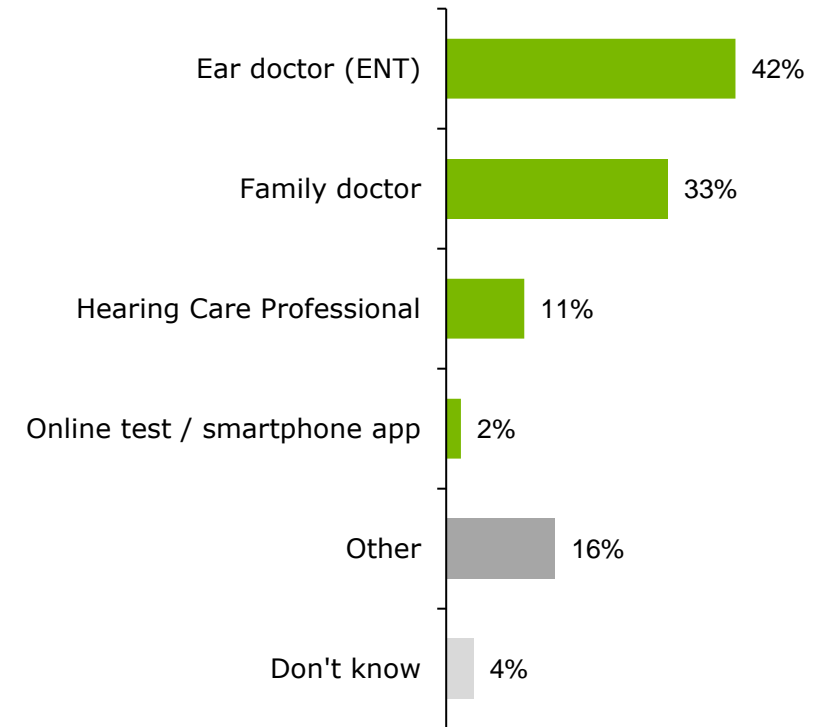
Have you ever taken a hearing test?

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



Base=12'606

Where/how was your hearing tested?

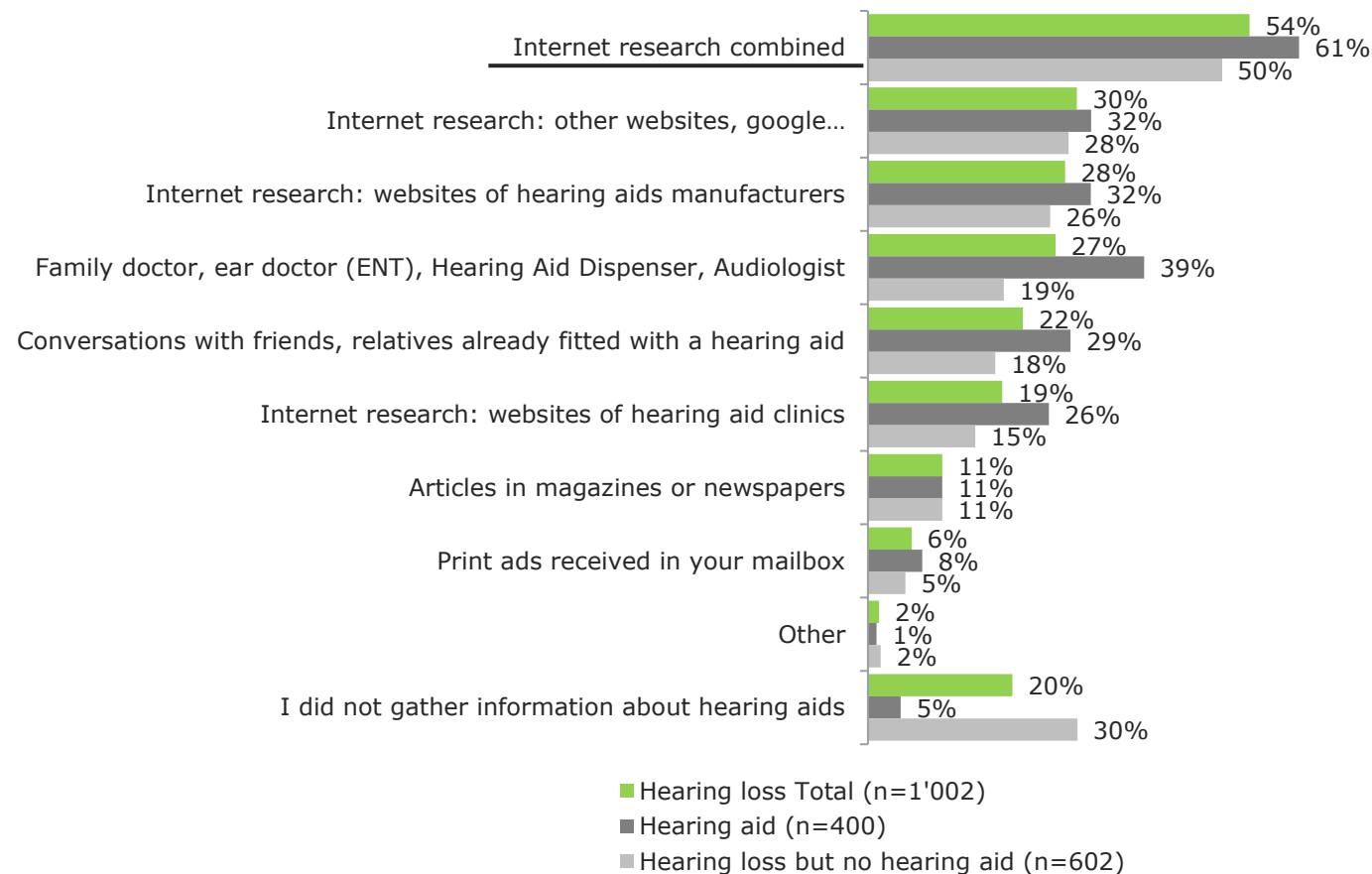


Base= 8'107

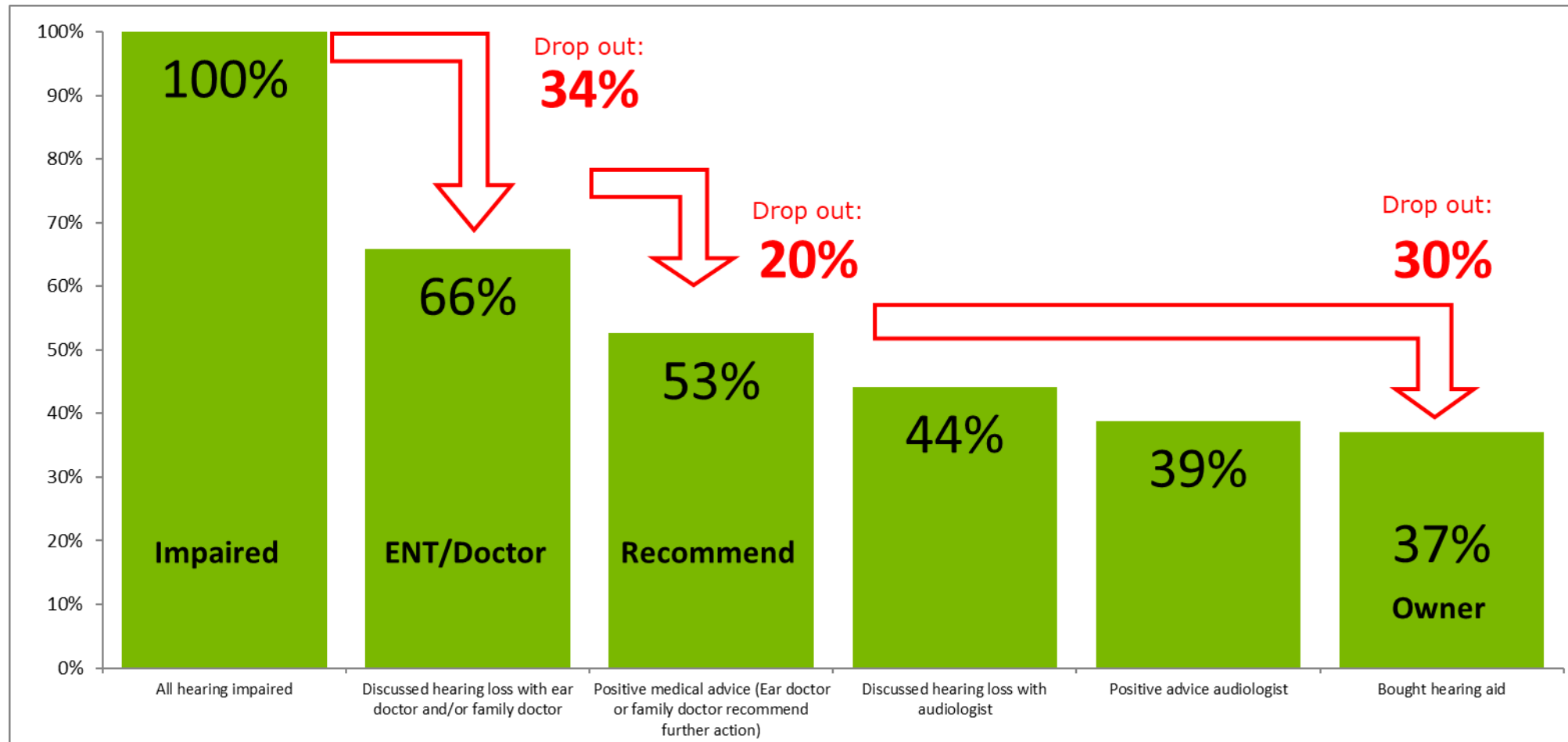
The route to the hearing aid: Sources of information and drop-out rates

Internet research is the most important source of information about hearing aids.

Where did you gather information about hearing aids?



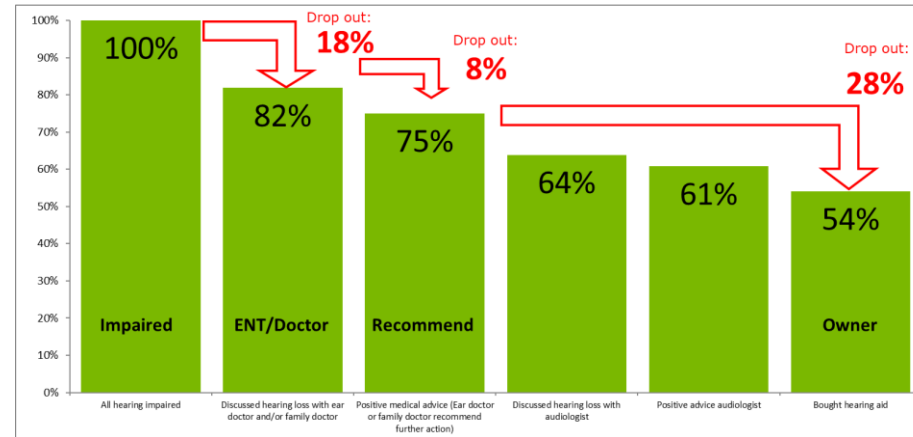
The route to the hearing aid



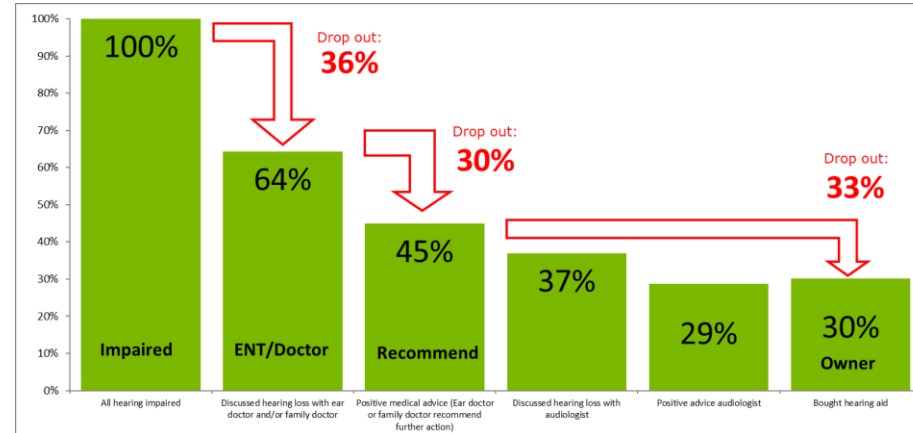
Base: N=1'002

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

Top 50% hearing loss*



Low 50% hearing loss*



Base: N=1'002

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

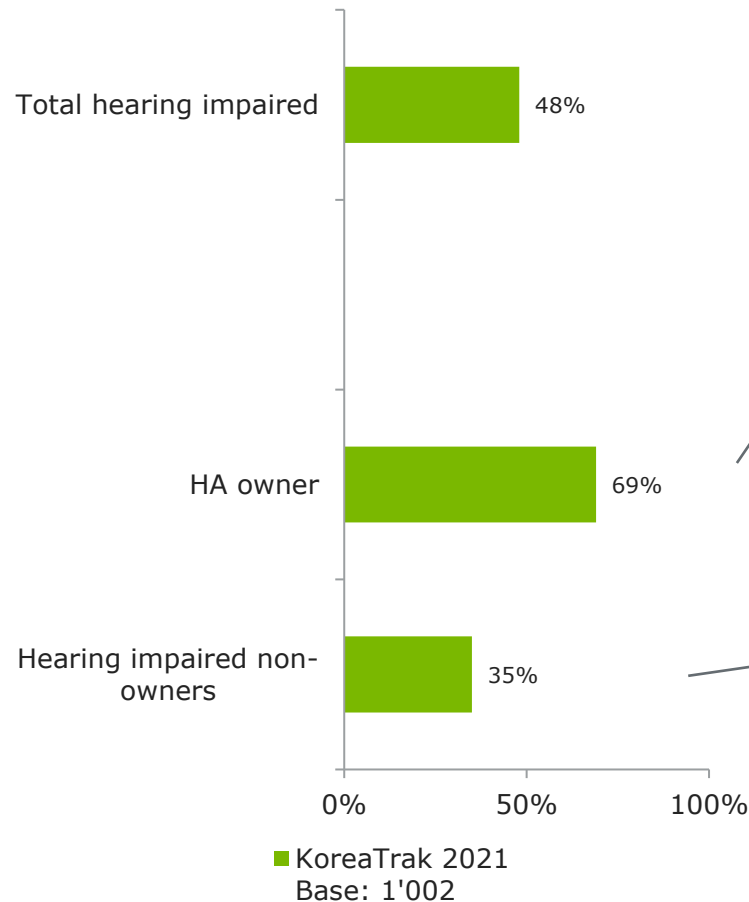
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).

The route to the hearing aid: GP/Family doctor

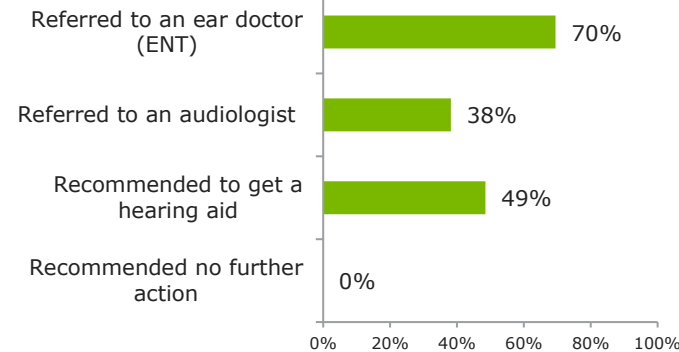
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

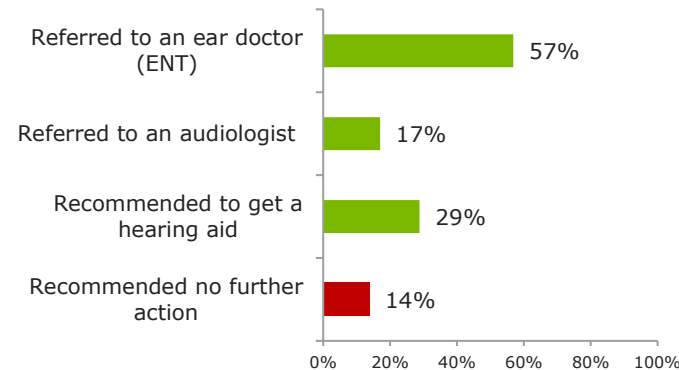


What did he/she recommend ?

HA owner (Base: 258)



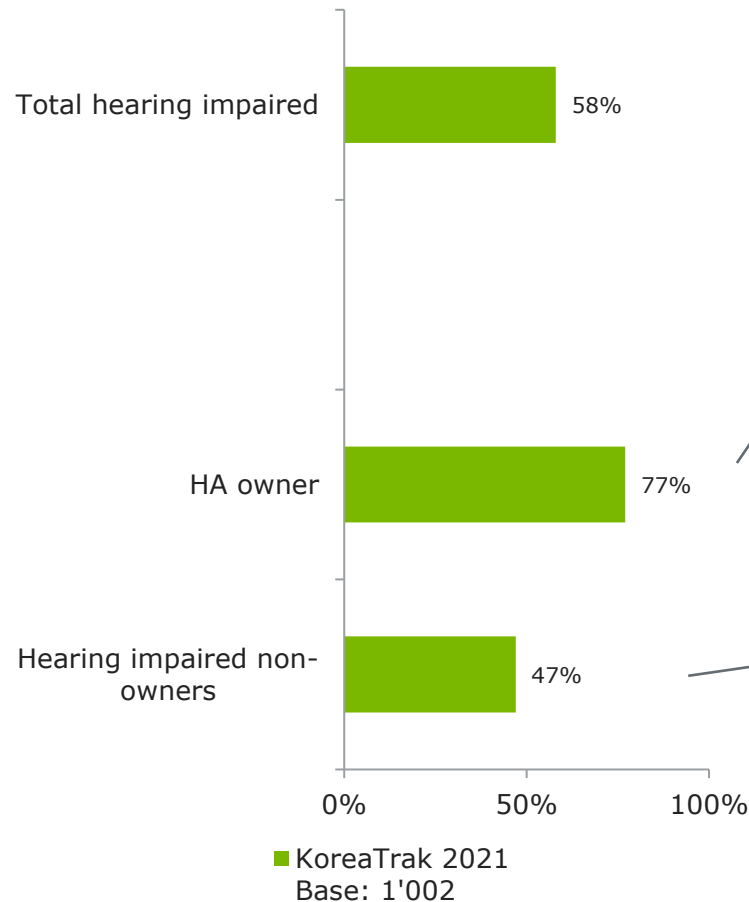
Impaired non-owner (Base: 182)



The route to the hearing aid: ENT

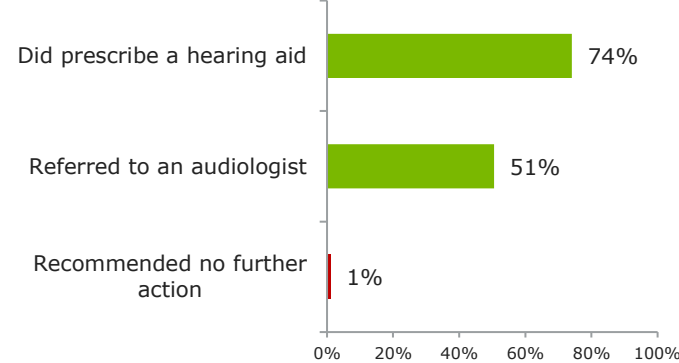
Have you ever discussed your hearing problem in a hospital with an ear doctor (ENT)?

% Discussed with ENT

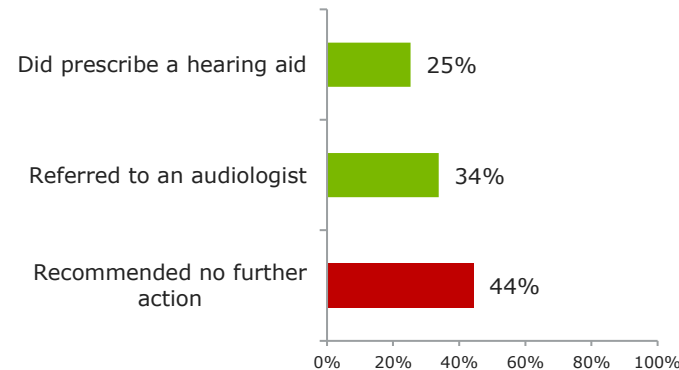


What did he/she recommend ?

HA owner (Base: 296)



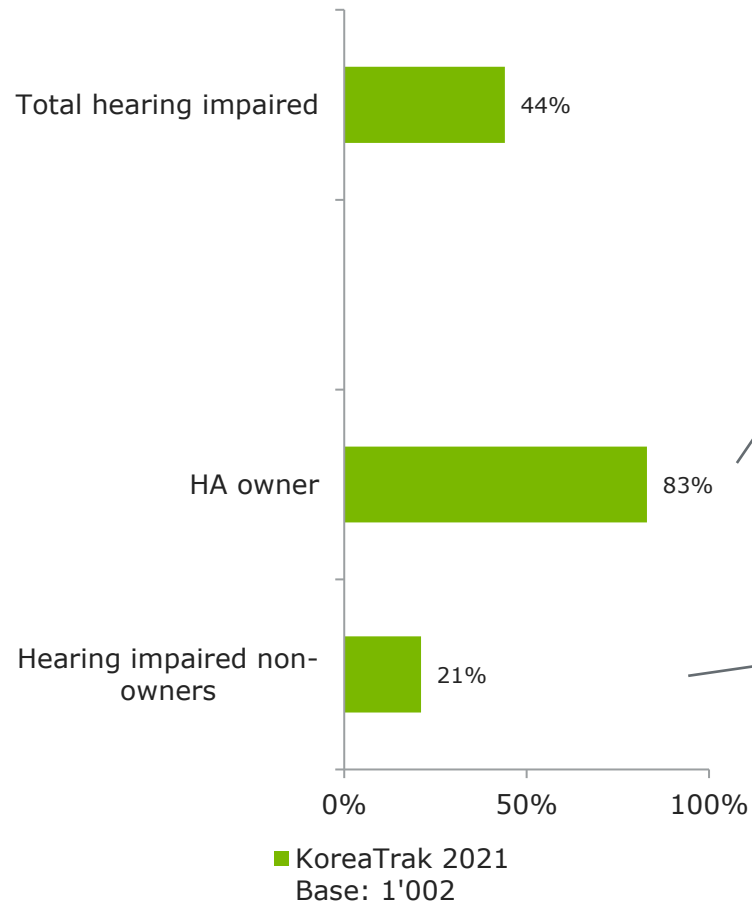
Impaired non-owner (Base: 267)



The route to the hearing aid: audiologist

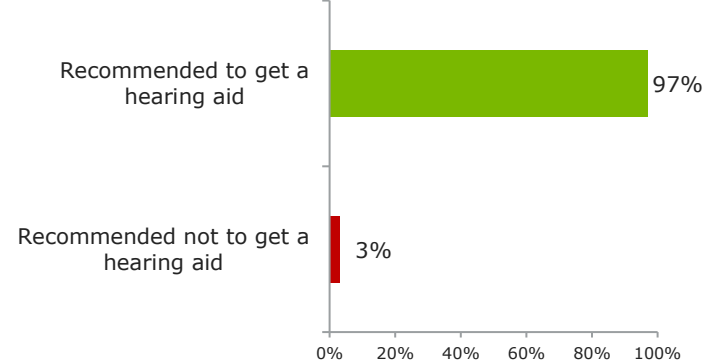
Have you ever discussed your hearing problem with an audiologist?

% Discussed with audiologist

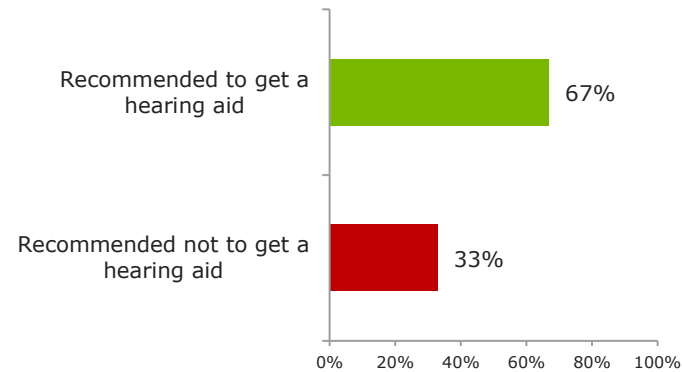


What did he/she recommend ?

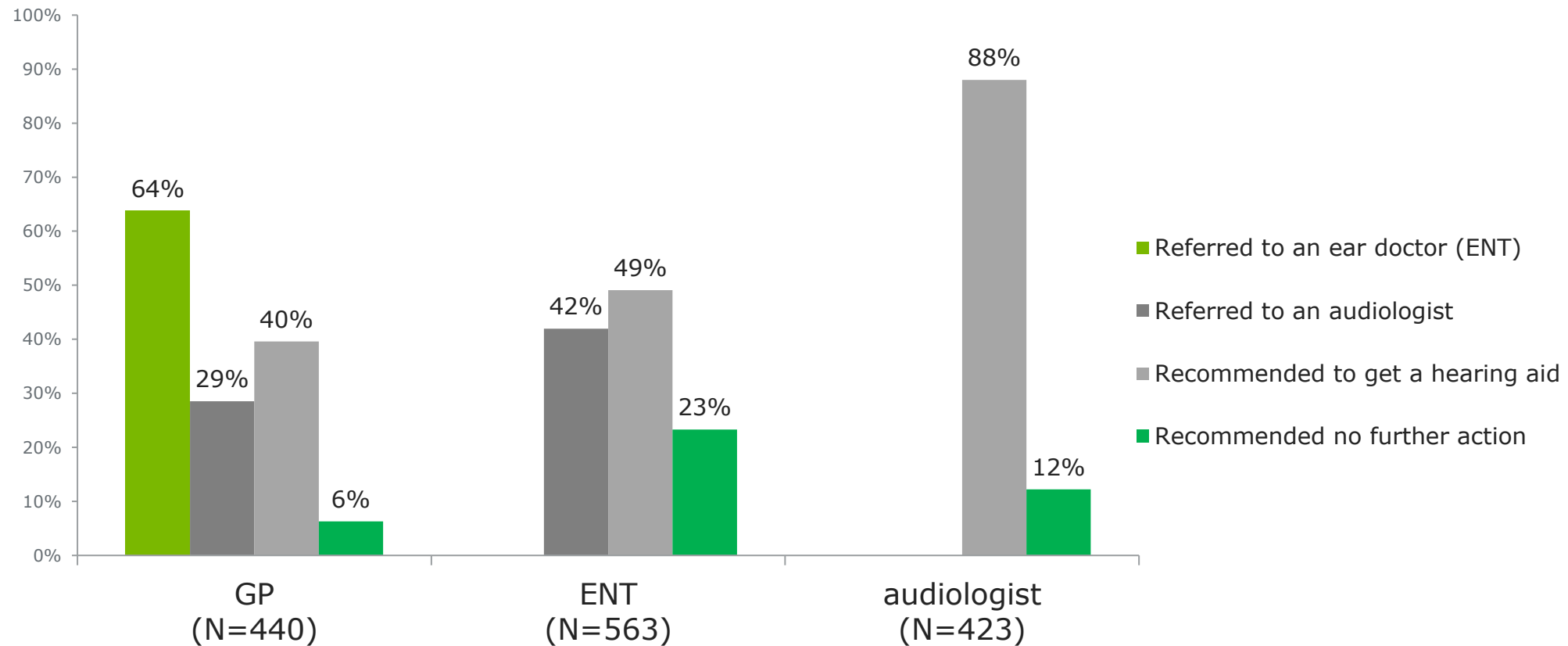
HA owner (Base: 311)



Impaired non-owner (Base: 112)



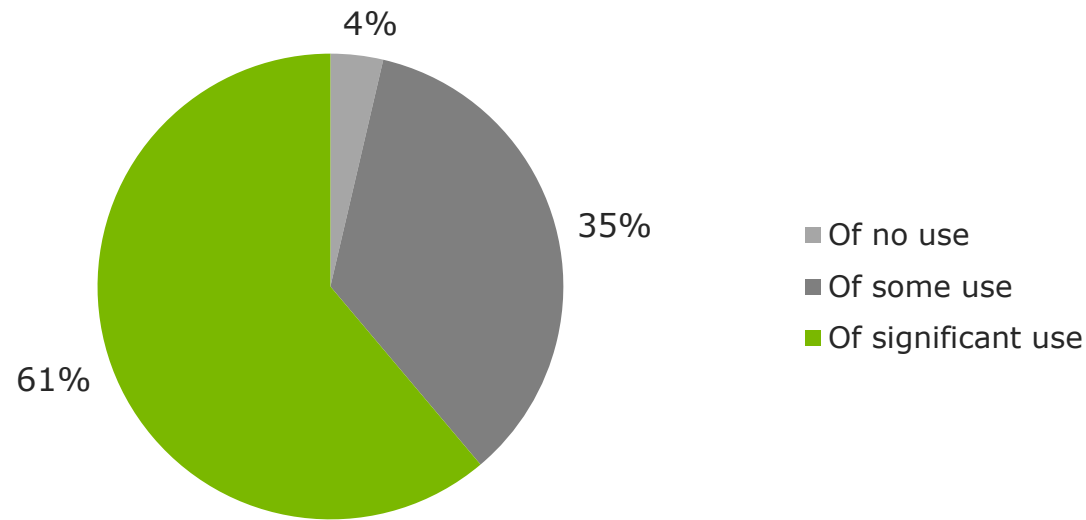
Recommendations by profession



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

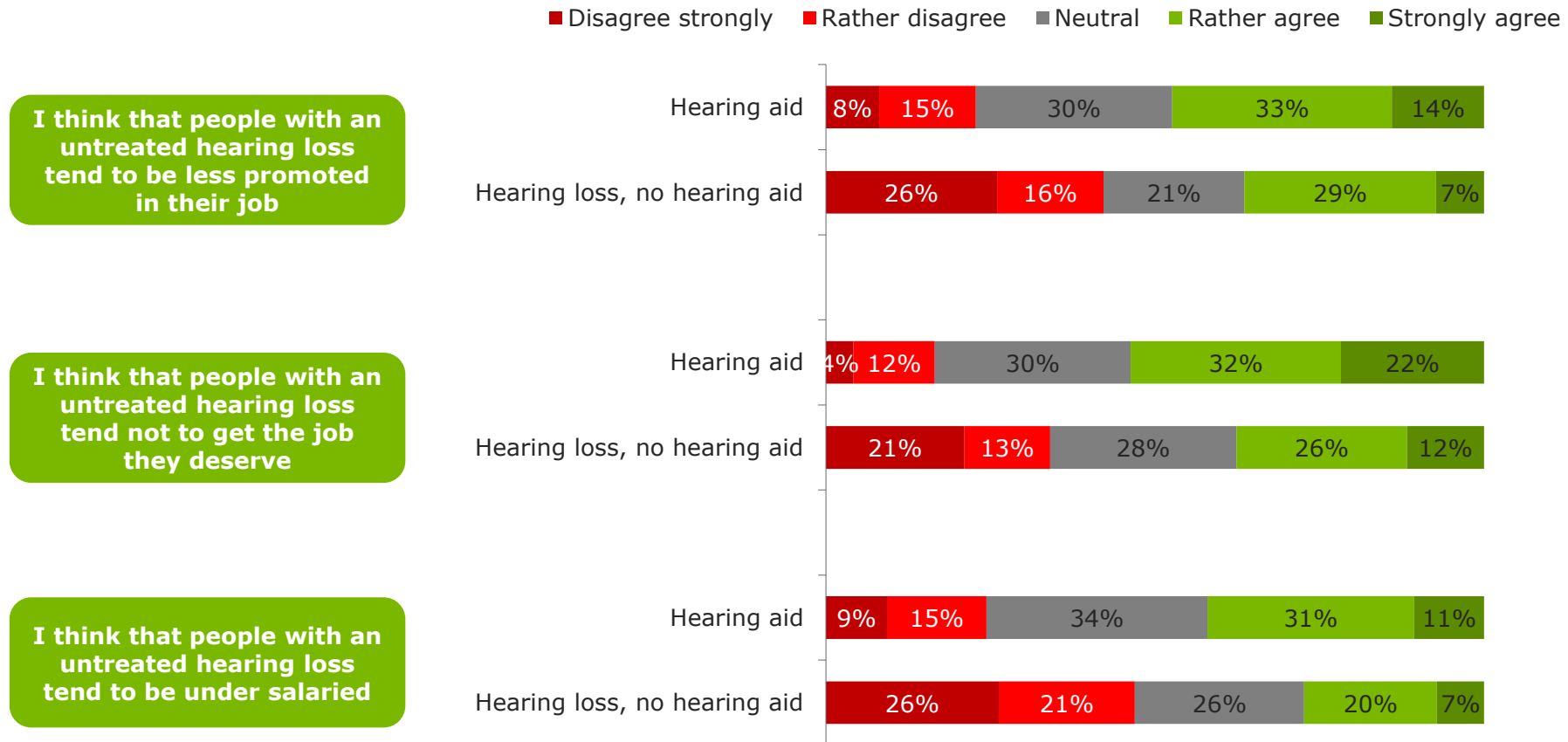
Work competitiveness: 96% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?



Base: N=219

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 = 527 / hearing aid N=377

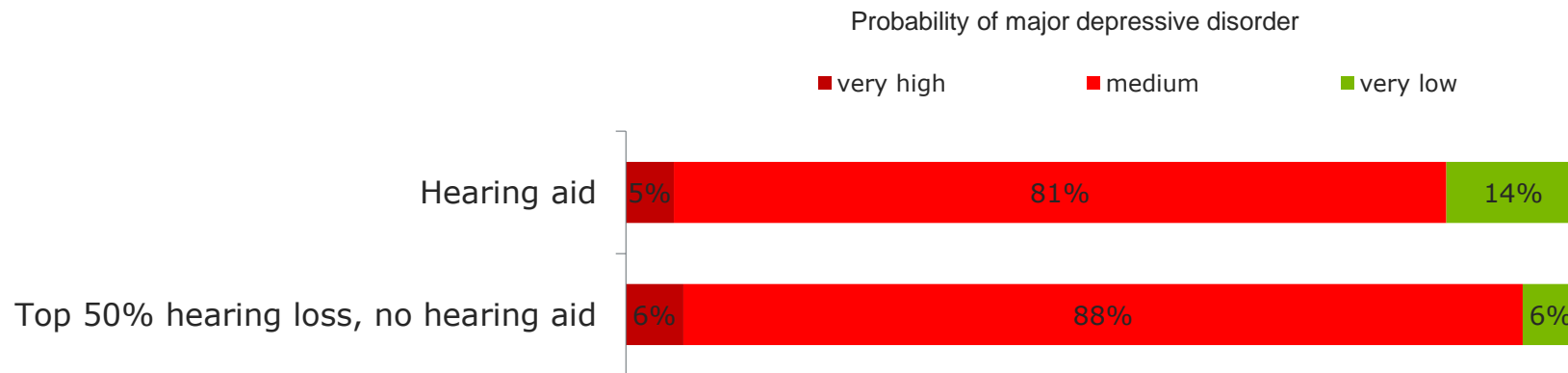
General health problems: Risk of being depressed (PHQ-2 Screening) for HA owners is slightly lower compared to impaired non-owners (Top50% hearing loss group*).

Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

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

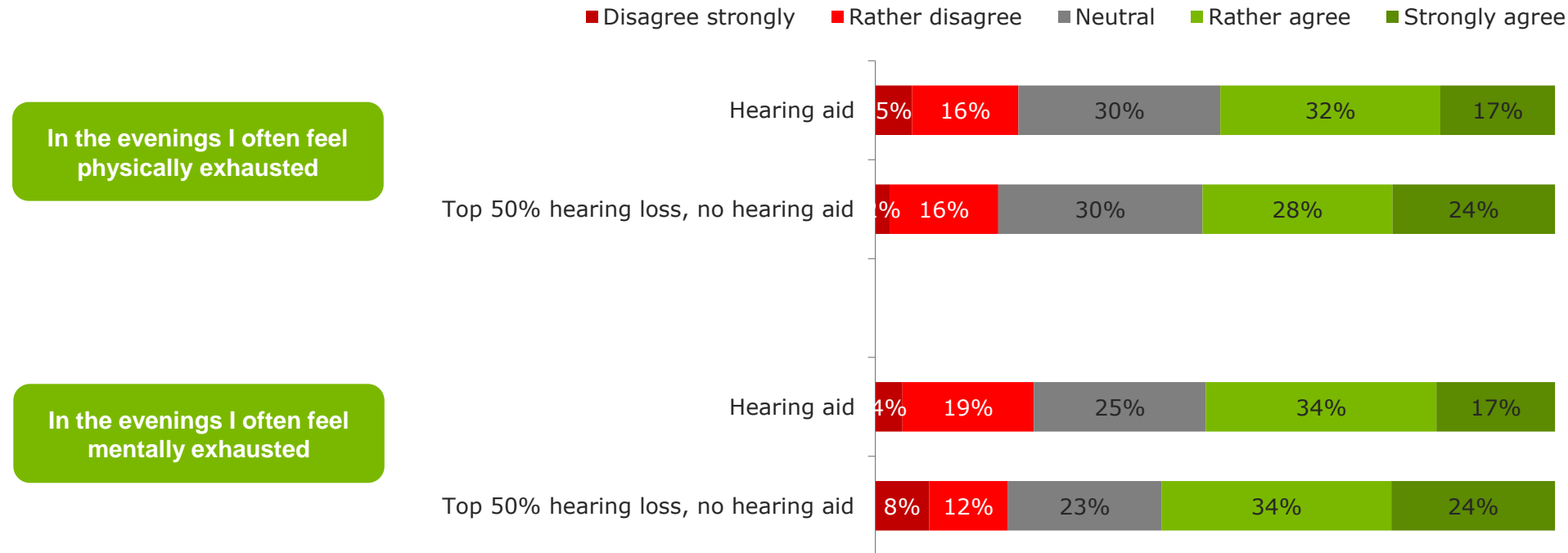


Base: hearing aid N=206 / top 50% HL, no hearing aid =69 (low sample size!)

*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 less exhausted in the evenings



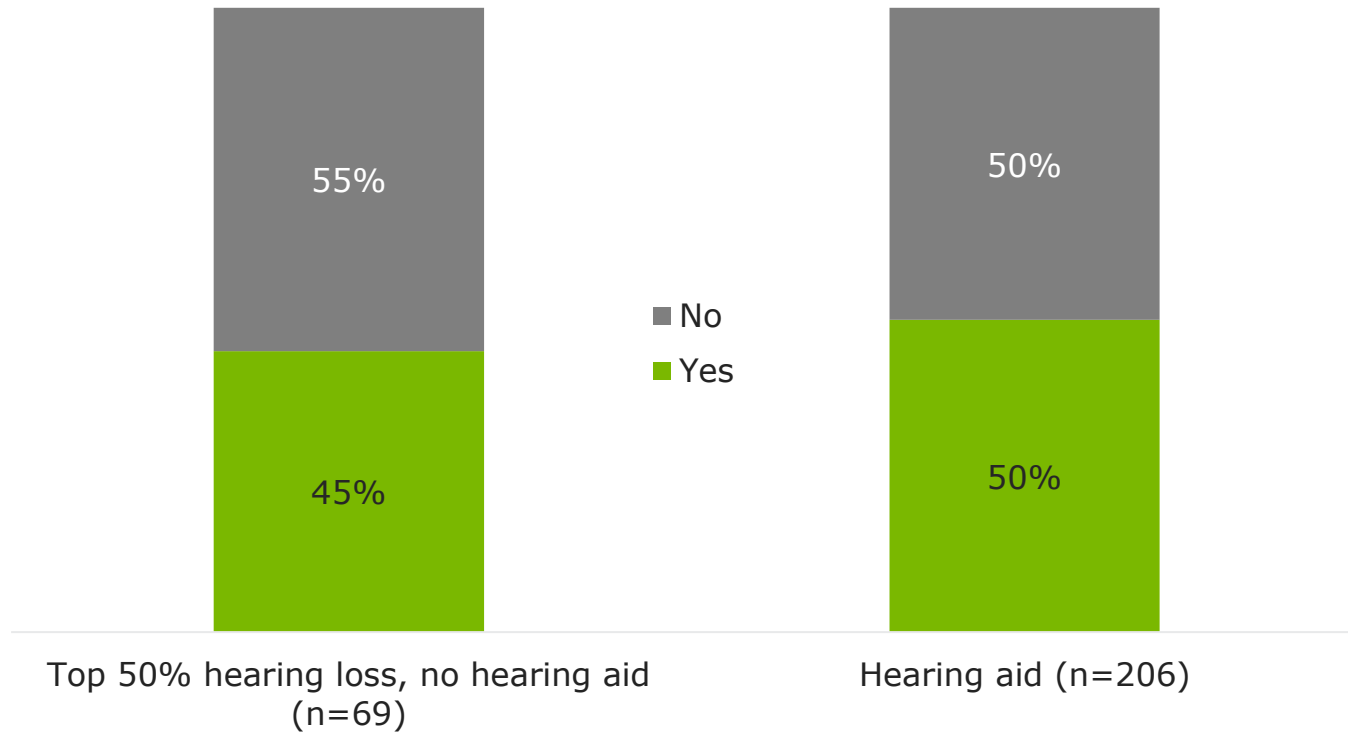
Base: hearing aid N=203 / top 50% HL, no hearing aid =69 (low sample size!)

*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).

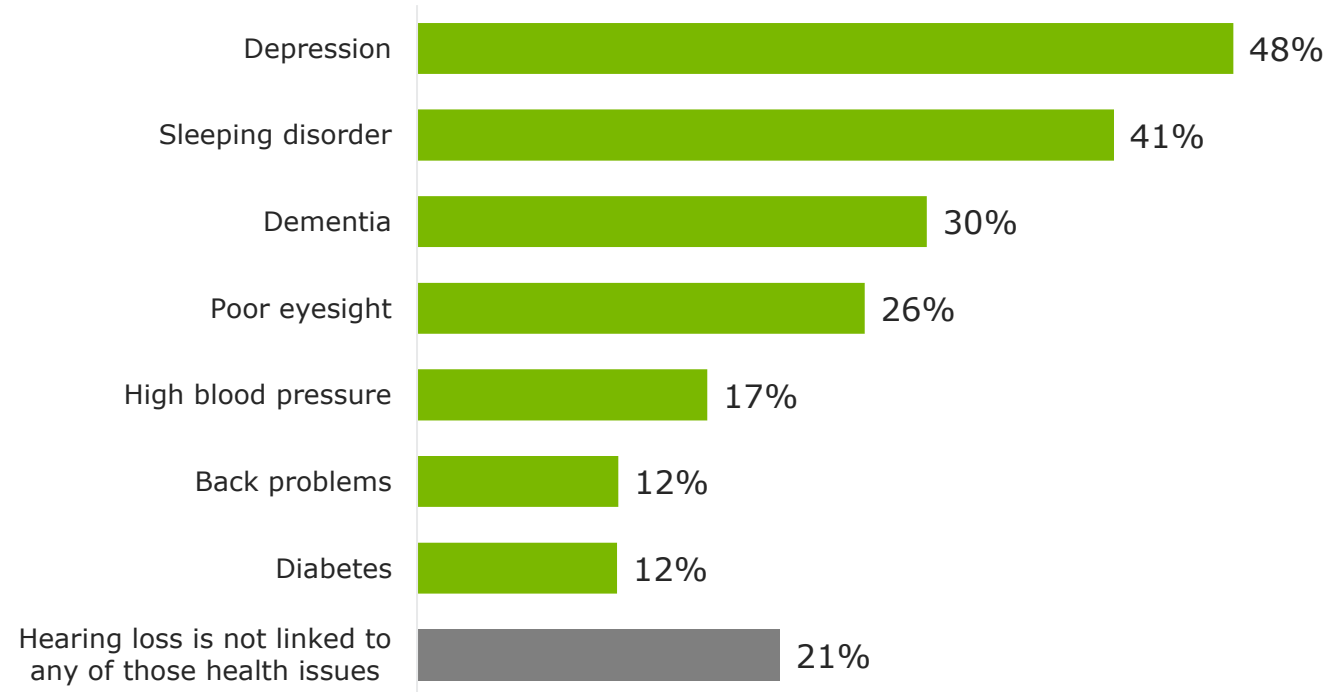
General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?



48% of all hearing impaired think that hearing loss could be linked to depression, 41% to sleeping disorder

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

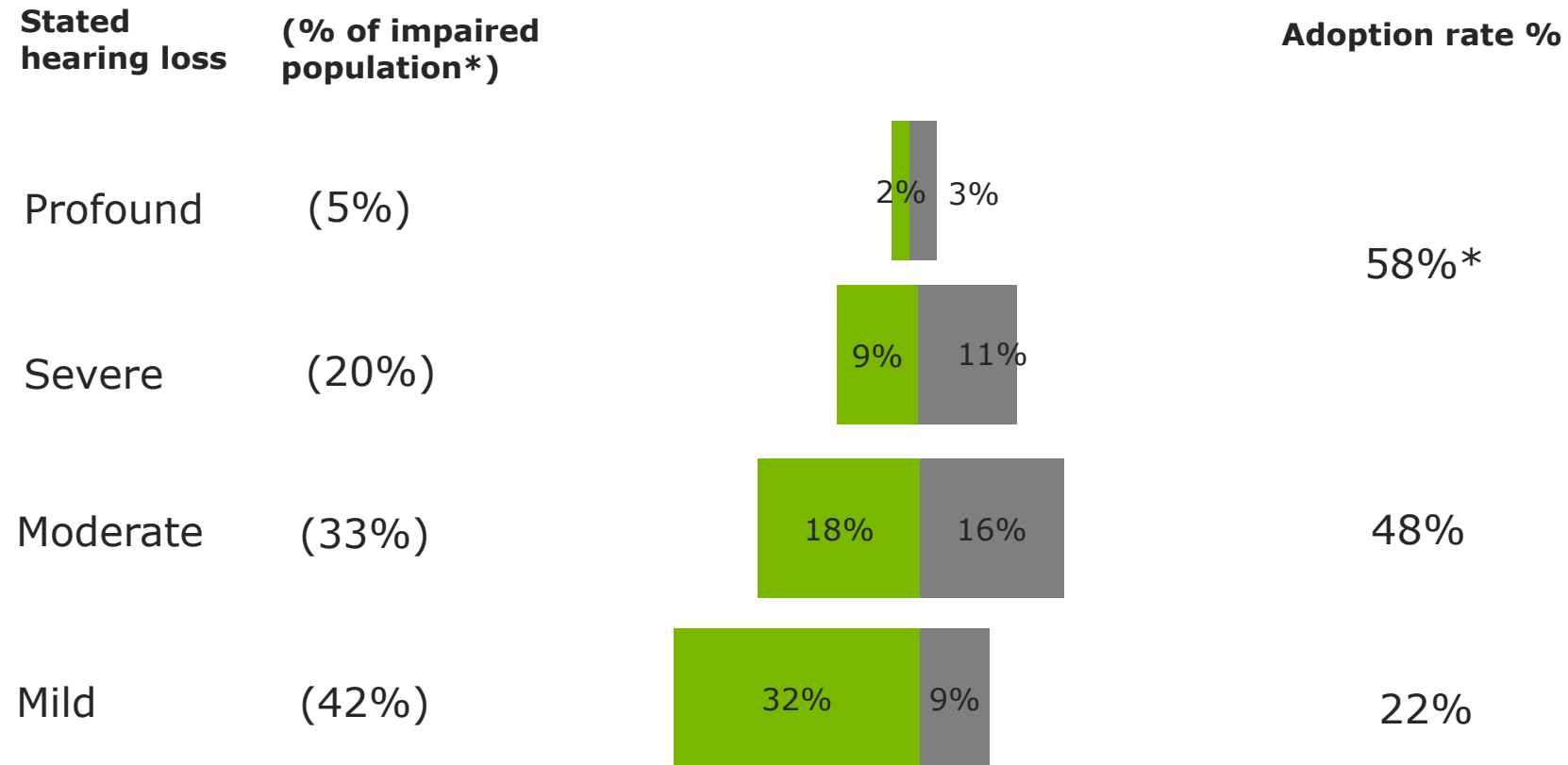


Hearing impaired, N=1'002

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

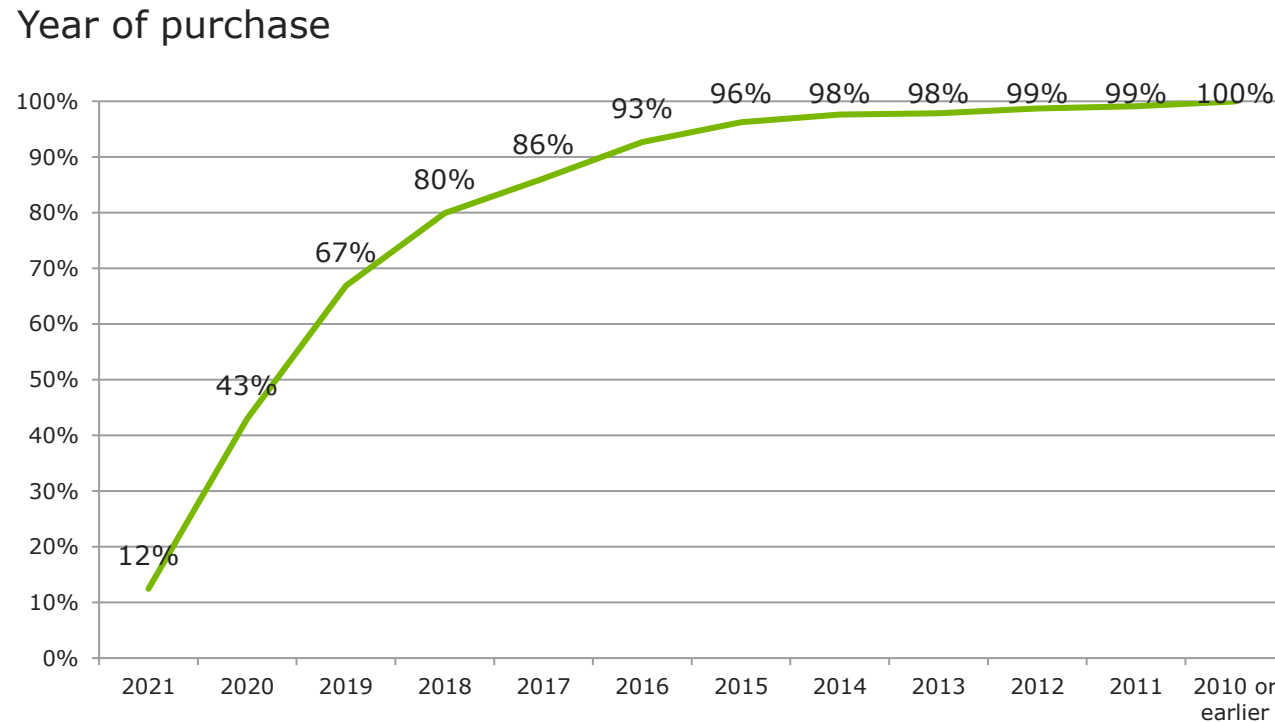


Base: N=897

Sums can differ from 100% due to rounding

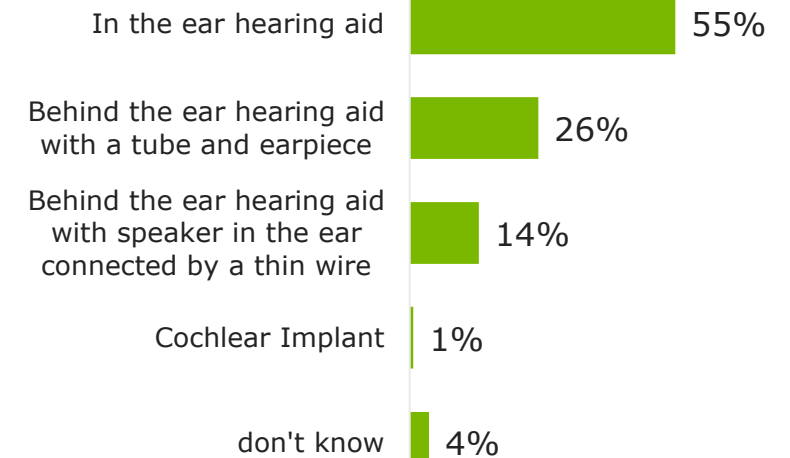
* combined "severe" and "profound" because n is too small

67% of the currently owned HAs were acquired in 2019 or later ITE is the most often purchased type of HA



Age of currently owned HAs (Mean): 3.0 years

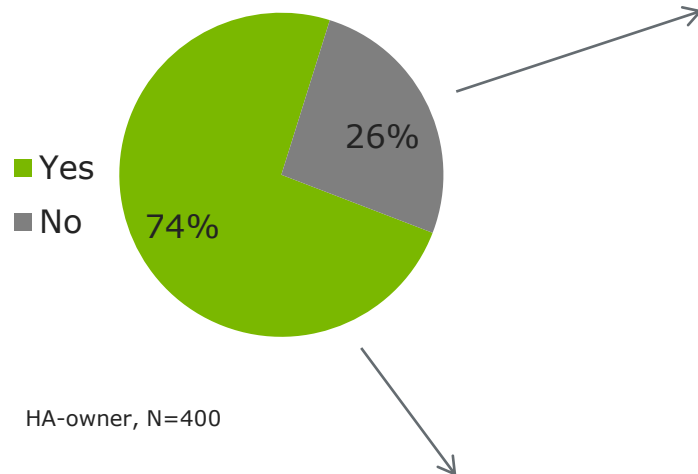
Type of HA



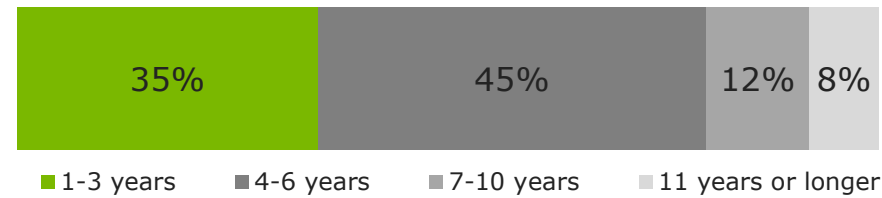
HA-owner, N=390

74% of current users are first time users. 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?



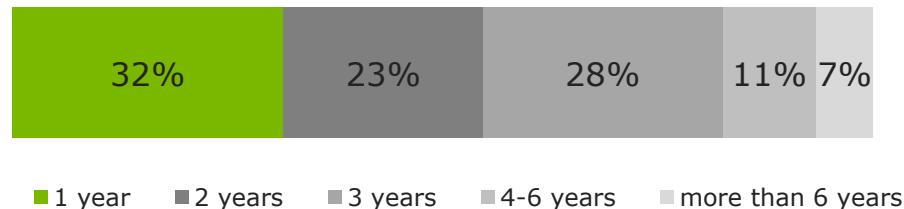
How many years did you own your previous HAs?



Base: N=90

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

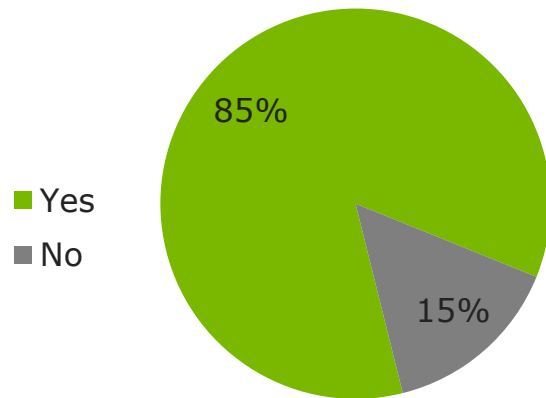
Thinking back before you acquired your first hearing aid: How many years have passed since you became aware of your hearing loss until you acquired a hearing aid?



Base: N=283

85% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life and better mental/emotional health.

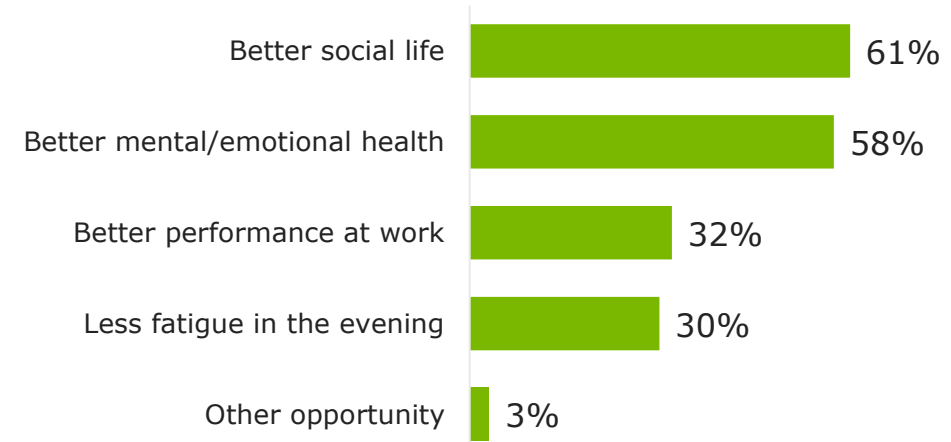
Thinking back before you obtained your first hearing aid(s): do you think, you should have gotten them sooner?



HA-owner, N=400

IF YES:

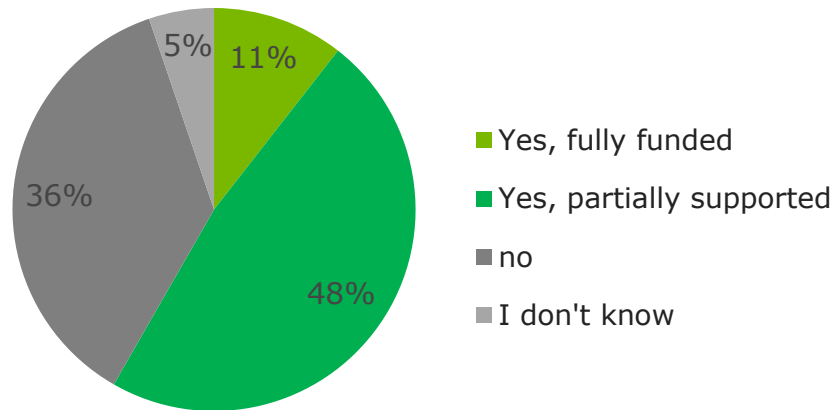
What are the reasons why you think you should have gotten your hearing aid(s) sooner? What are the opportunities you think you have missed because of this? Please tick all that apply



Base: N=332

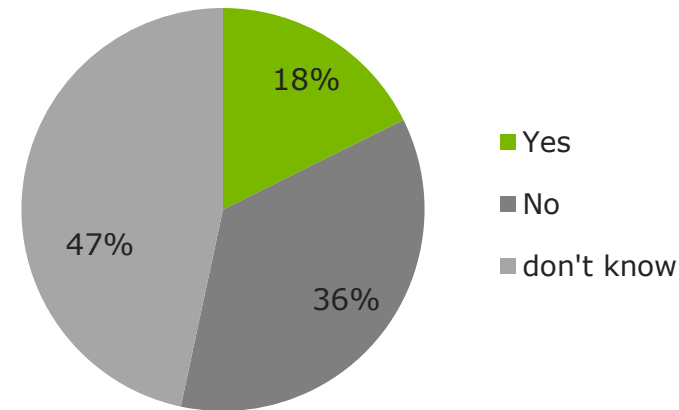
Only 1 out of 10 HA owners got the HAs fully funded, 48% received partial support. Most non owners think that no funding is available or they don't know.

Owners: Did you purchase your hearing aids through a third party purchase channel, such as a state grant or sponsorship?



HA-owner, n=400

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

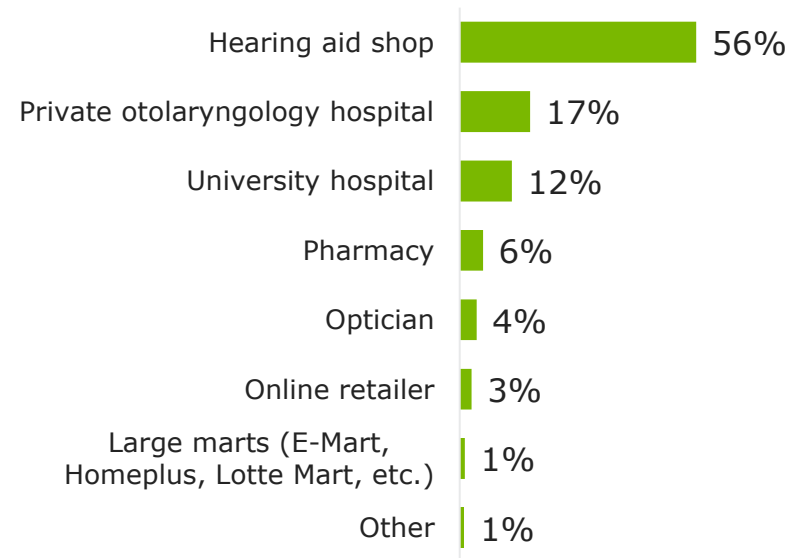


HA-non-owners, n=602

Specialized hearing aid store is where most current hearing aids have been obtained (and non owners would most likely go to).

OWNERS:

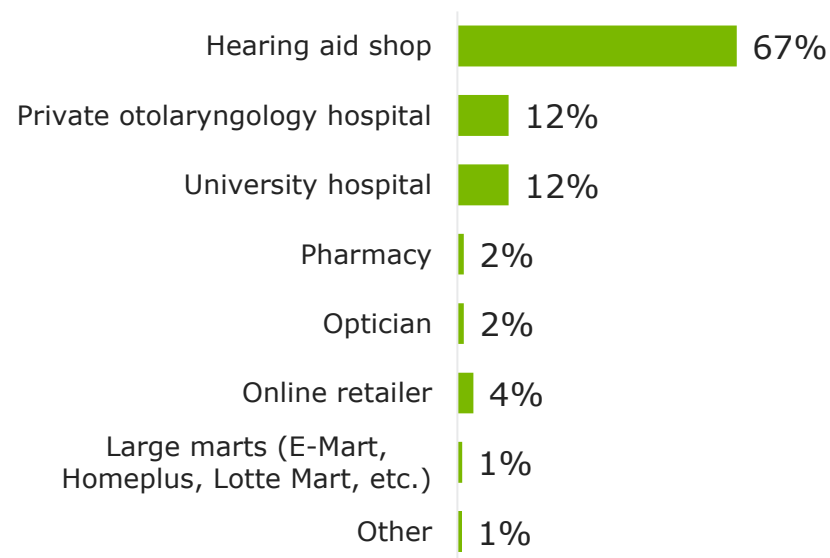
Where was your most current hearing aid obtained?



HA-owner, N=400

NON OWNERS:

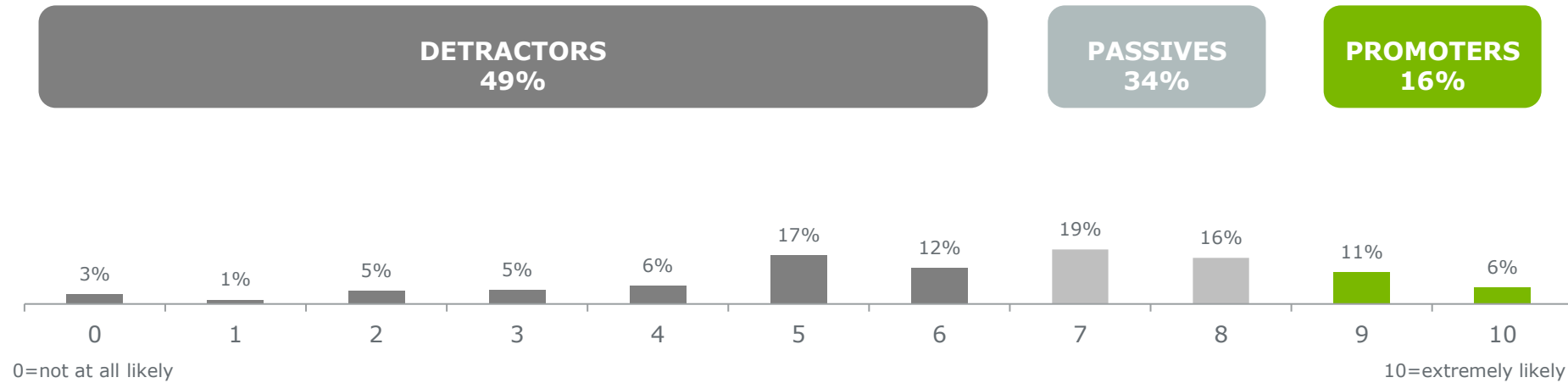
If you were to get hearing aids, where would you go?



HA-non-owner, N=602

Recommendation intention of the place where the hearing aid(s) have been obtained is relatively low with a negative NPS score of -33.

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

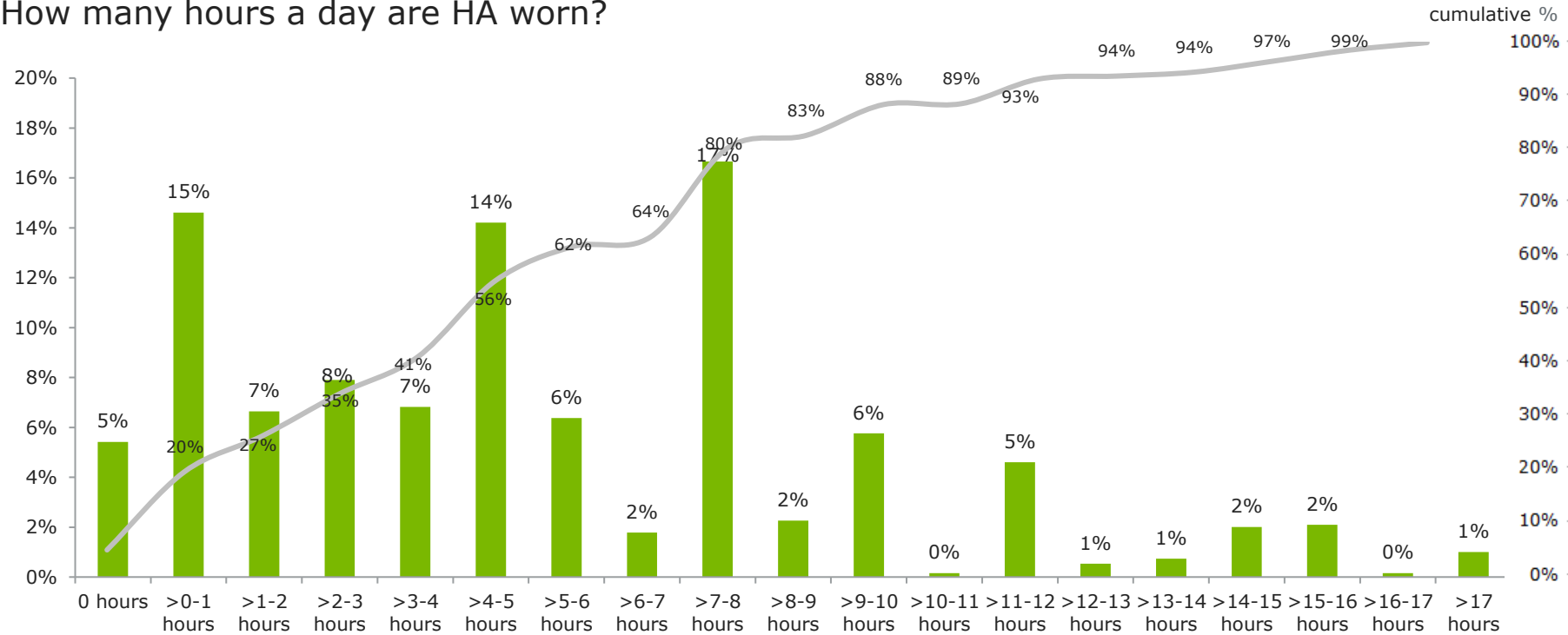


$$\text{NPS} = \text{PROMOTERS} - \text{DETRACTORS} = -33$$

HA-owner, N=400

On average, HAs are worn 5.7 hours a day

How many hours a day are HA worn?



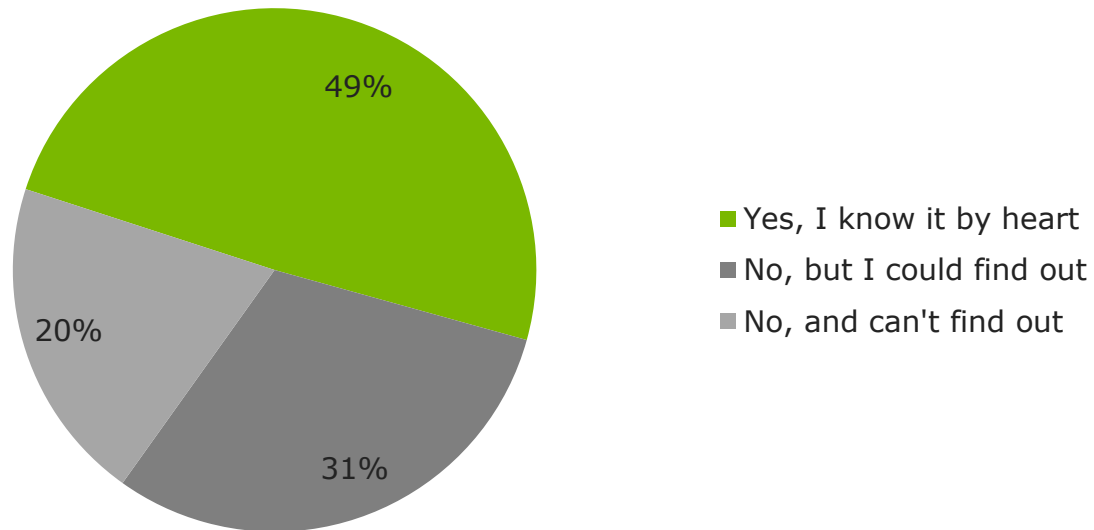
HA worn:
Mean: 5.7 hours/day

In the drawer (0 hours): 5%

HA-owner, N=400

49% of today's hearing aid owners are aware of their hearing aid brand.

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



HA-owner, N=400

39% of the HA owners use an accessory for their hearing aids. 52% 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=400)

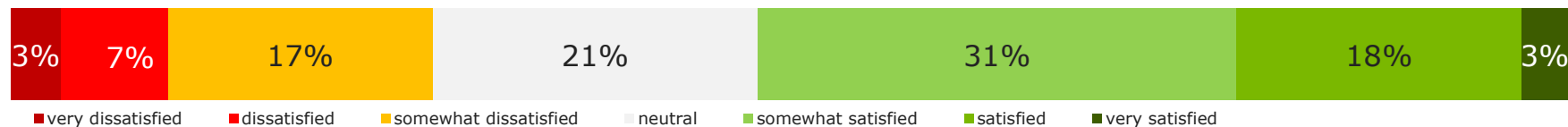


Do you personally use accessories for your hearing aids (TV-Streamer/ Apps / Remote Control / etc.) ? (HA owners, N= 400)



IF ACCESSORIES USED (N=162):

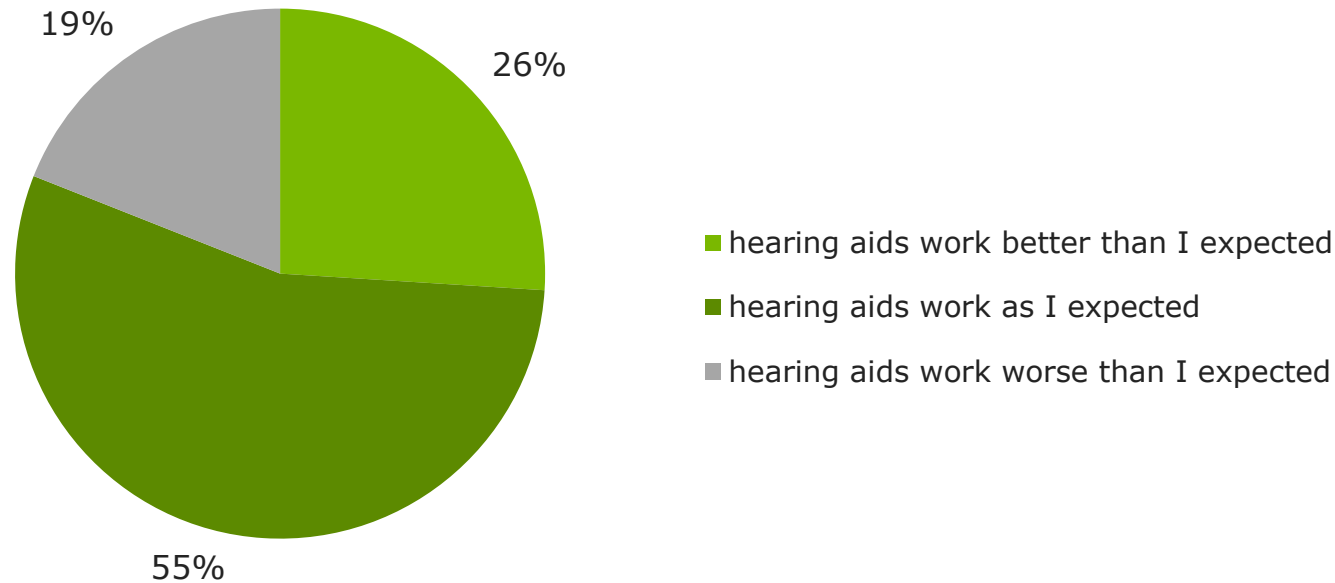
Overall, how satisfied with the performance of your accessorie(s)?



Satisfaction with hearing aids and drivers

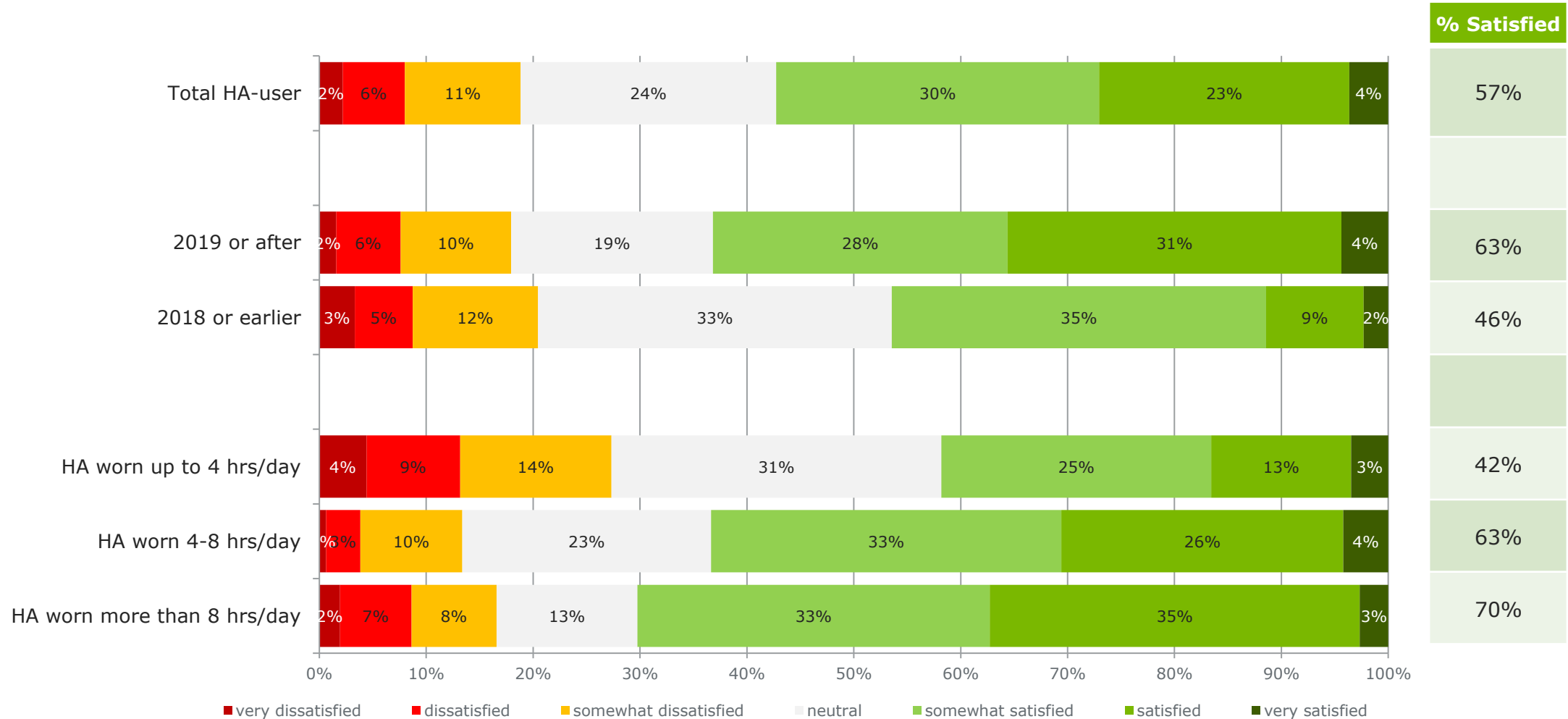
81% of the hearing aid owners say their hearing aid works better than or as expected

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



Base: N=400

Overall satisfaction with HA: 57% of hearing aid owners are satisfied with their hearing aid(s), 19% are dissatisfied.



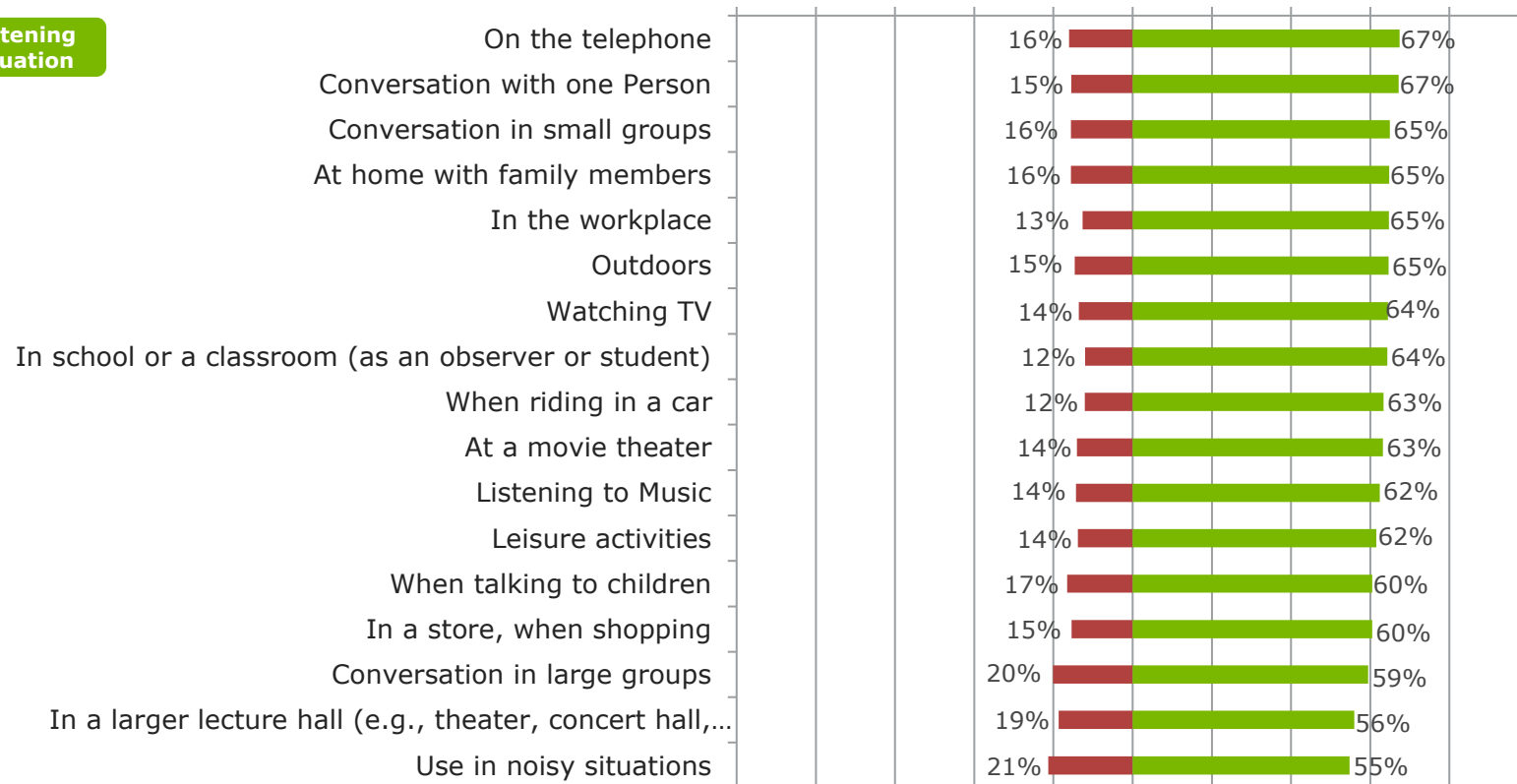
Satisfaction with current hearing aids



HA-owner, N=400

Satisfaction with current hearing aids

Listening situation



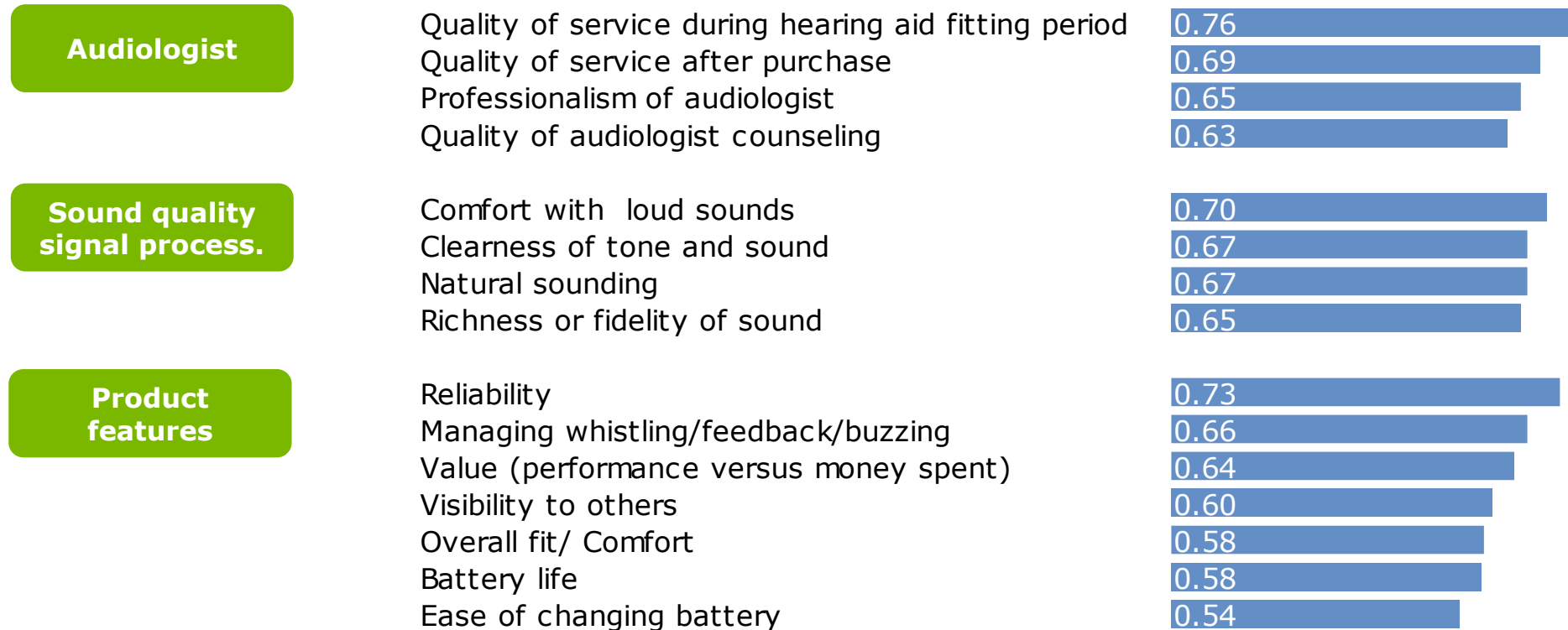
%dissatisfied= % very dissatisfied + % dissatisfied + % somewhat dissatisfied
 %satisfied= % somewhat satisfied + % satisfied + % very satisfied

■ dissatisfied ■ satisfied

HA-owner, N=400

Quality of service during hearing aid fitting period, reliability and comfort with loud sounds are the most important factors influencing satisfaction with current HA

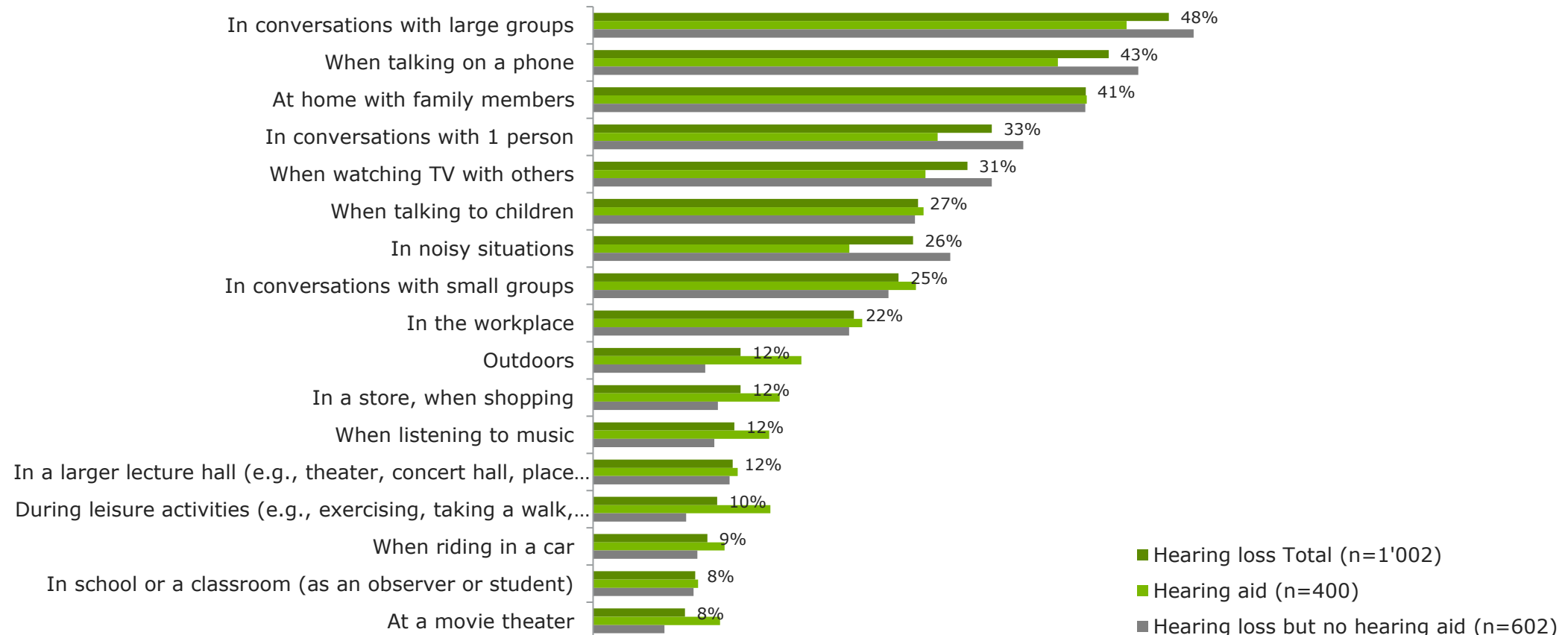
Influence on overall satisfaction with HA*



*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction, 1 means a maximal relationship. **Read:** Quality of service during hearing aid fitting period is the most important criteria for satisfaction.

Important listening situations

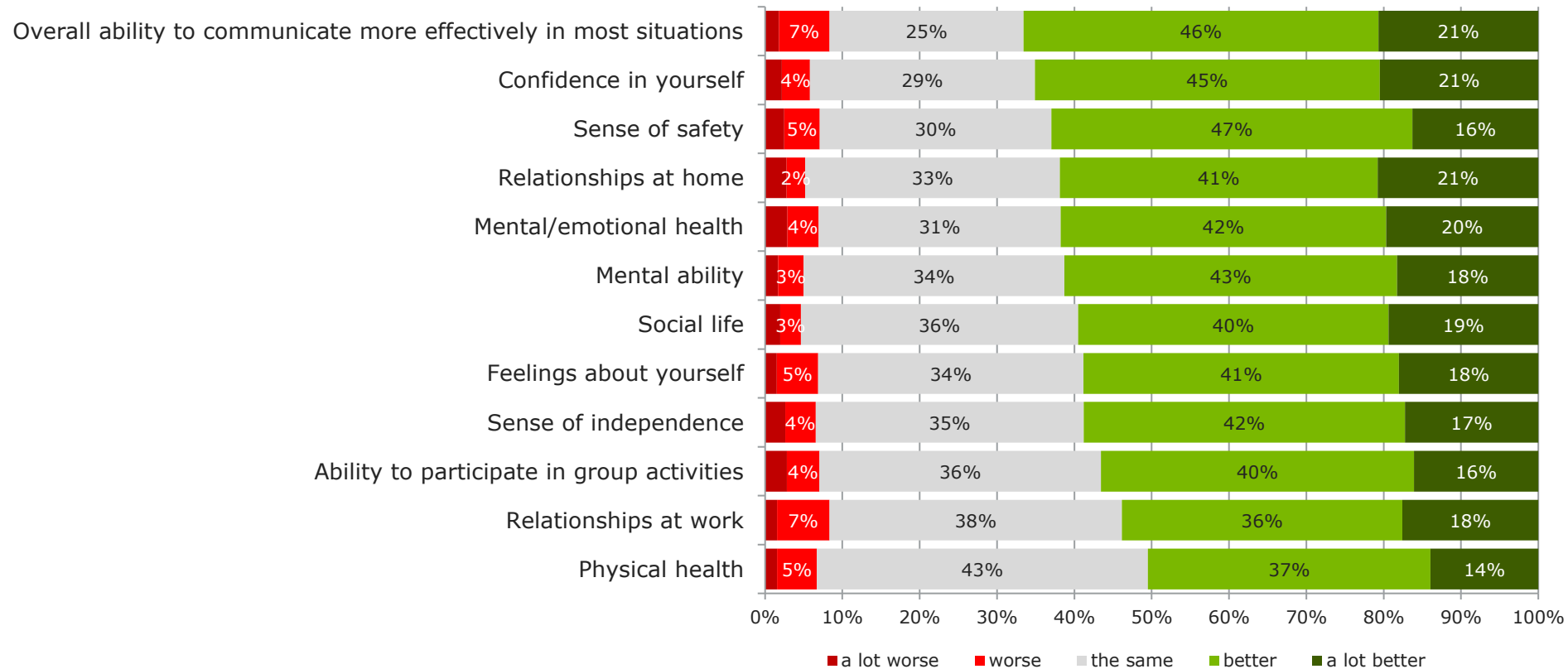
In which of these situations is it most important for you to hear well?
(choose up to 5)



Positive impact of hearing aids, quality of life

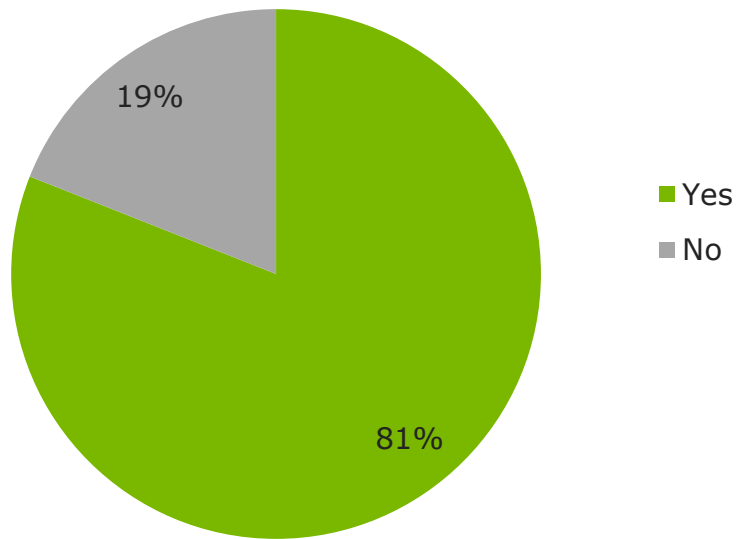
Significant positive impact of HAs on different aspects: Especially communication effectiveness, confidence, sense of safety and relationships at home improve with hearing aids.

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).



Most hearing aid owners feel more confident moving in a city since wearing hearing aids!

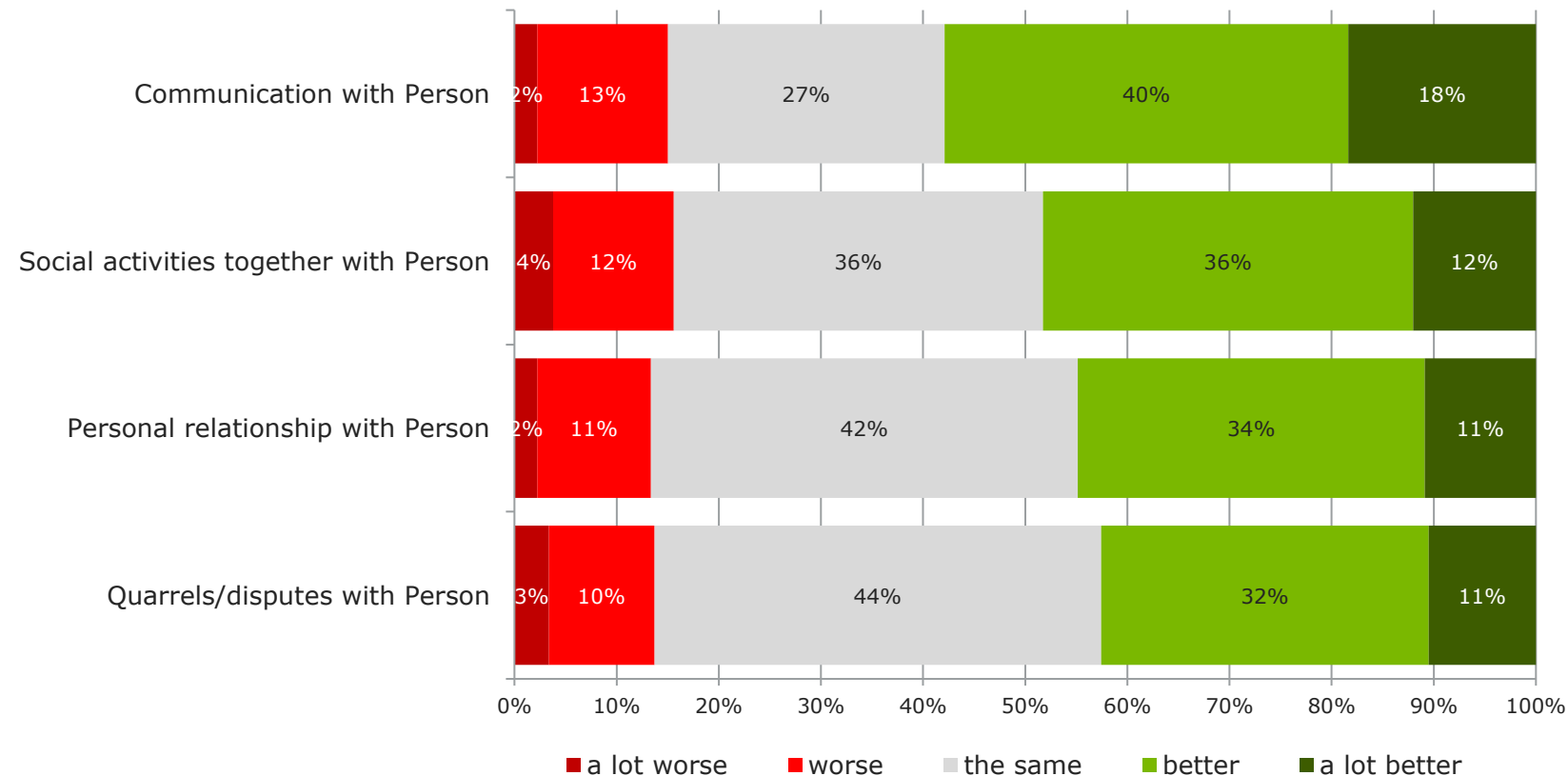
Since wearing a hearing aid, do you feel more confident moving in a city, e.g. because you hear traffic signals/vehicles approaching?



Base: N=400

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

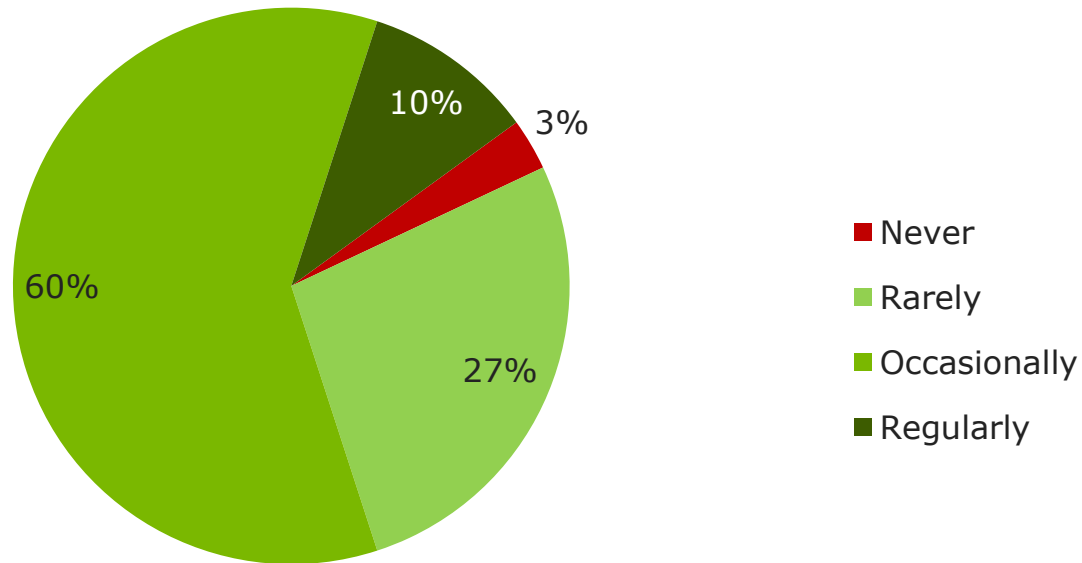
How did the following aspects change since person X is wearing hearing aids?



Someone in HH / parent has HA, N=337

97% of the 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=400

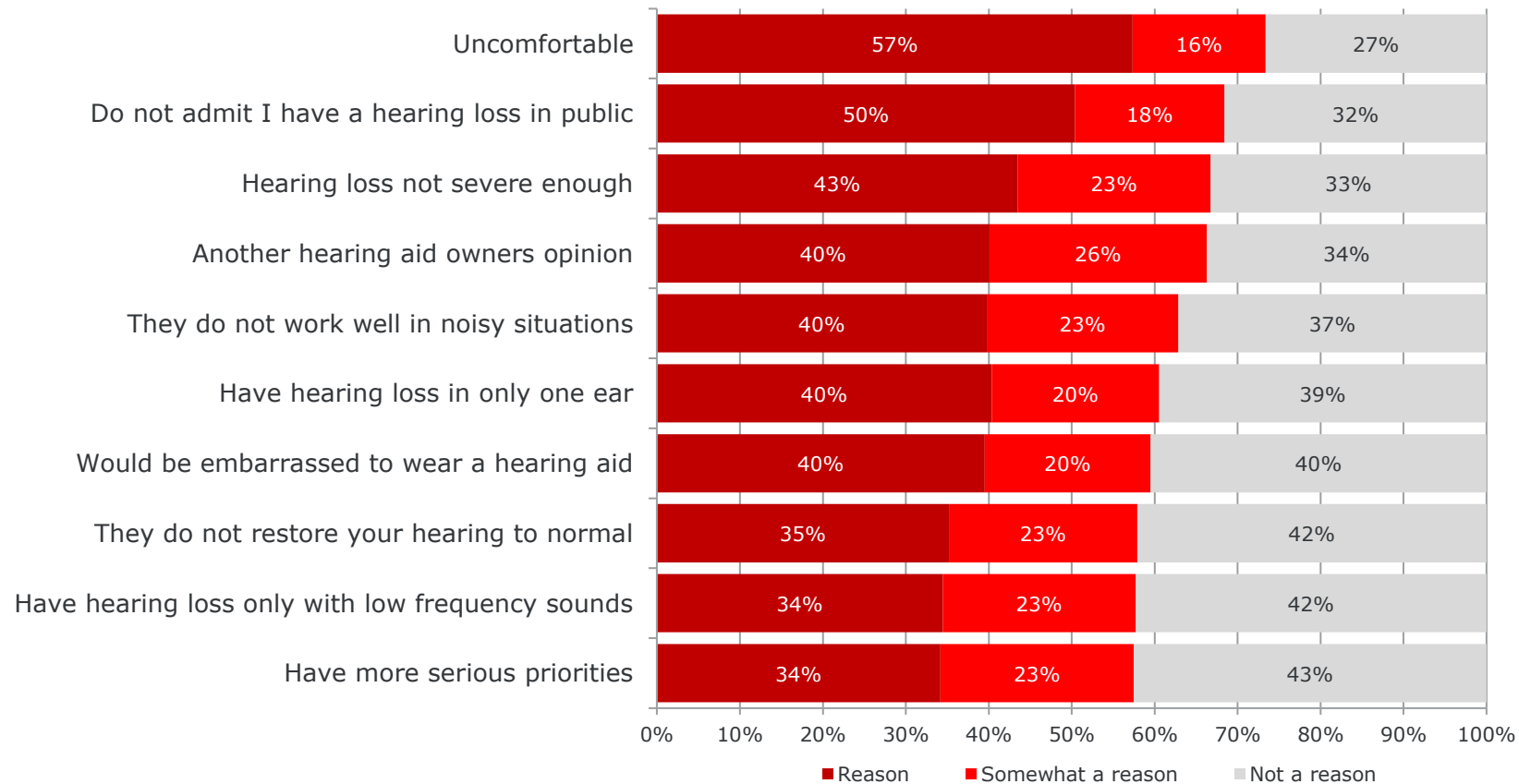
4. Analysis of hearing impaired non-owners

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

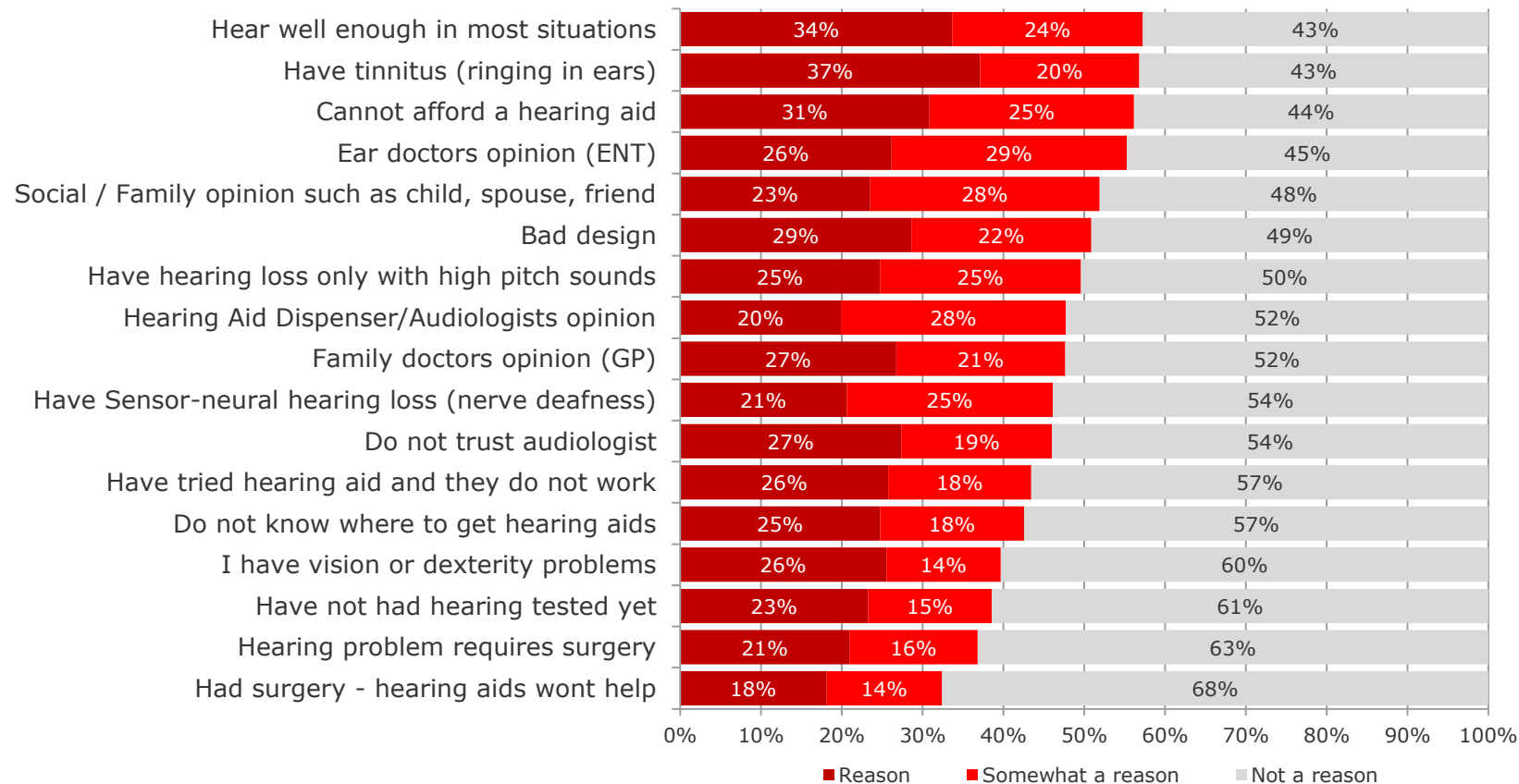
	HA Owner	HA-Non-owner Low 50% HL	Non-owner Top 50% HL
Perceived loss		More similar hearing loss-structure	
Mild	23%	66%	17%
Moderate	40%	24%	45%
Severe	29%	8%	31%
Profound	7%	1%	6%

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



Base: non owners Top 50% HL: N=146

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

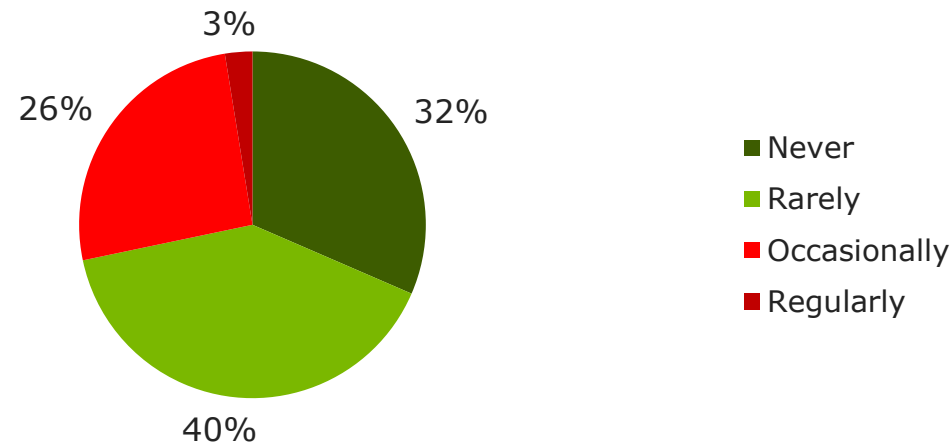


Base: non owners Top 50% HL: N=146

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

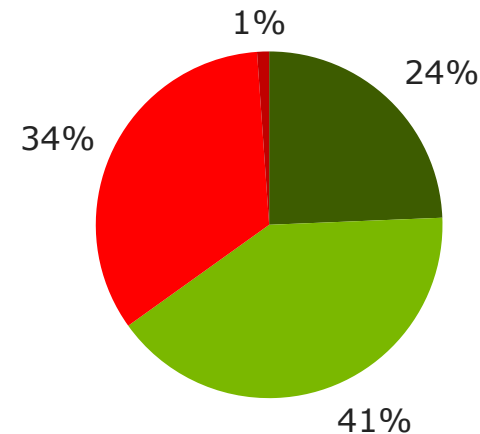
32% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

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



Base: N=400

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



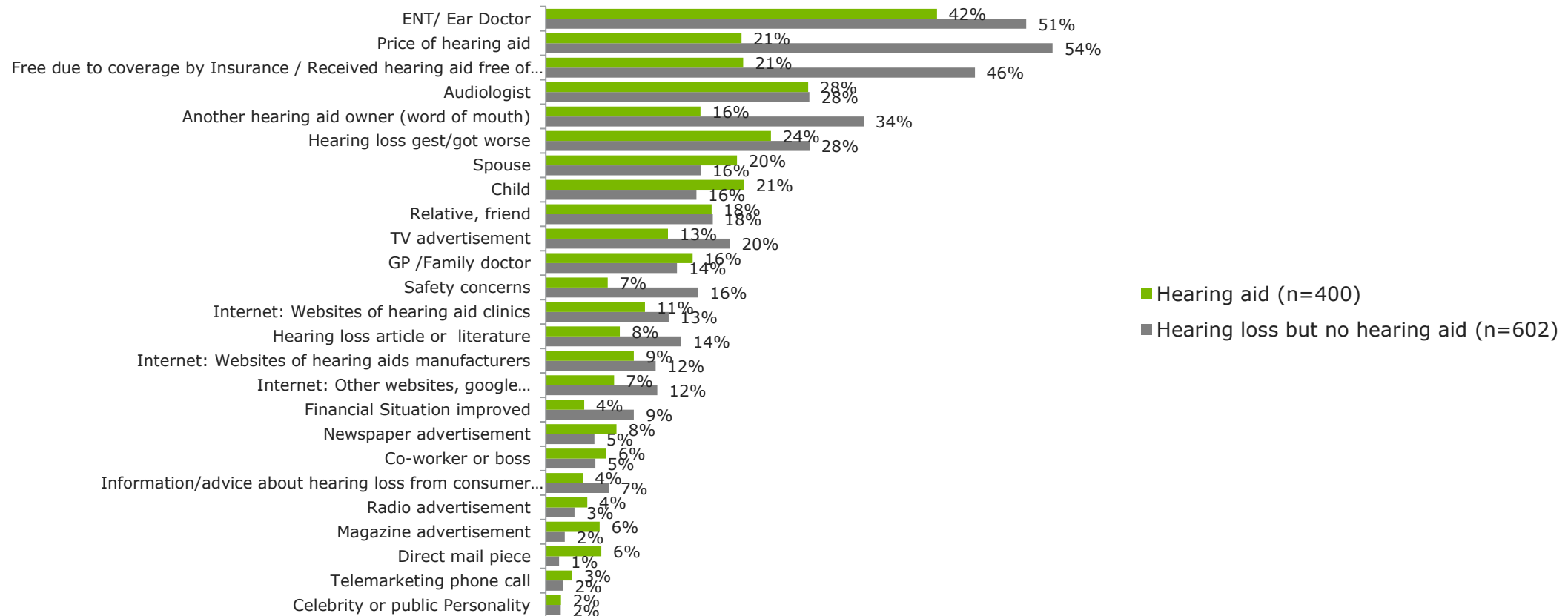
Base: Top 50% hearing loss, no hearing aid N=146

Most important triggers to buy

The most important influencing factors are ENT, audiologist, worsening hearing loss (+price, insurance coverage especially for the non owners)

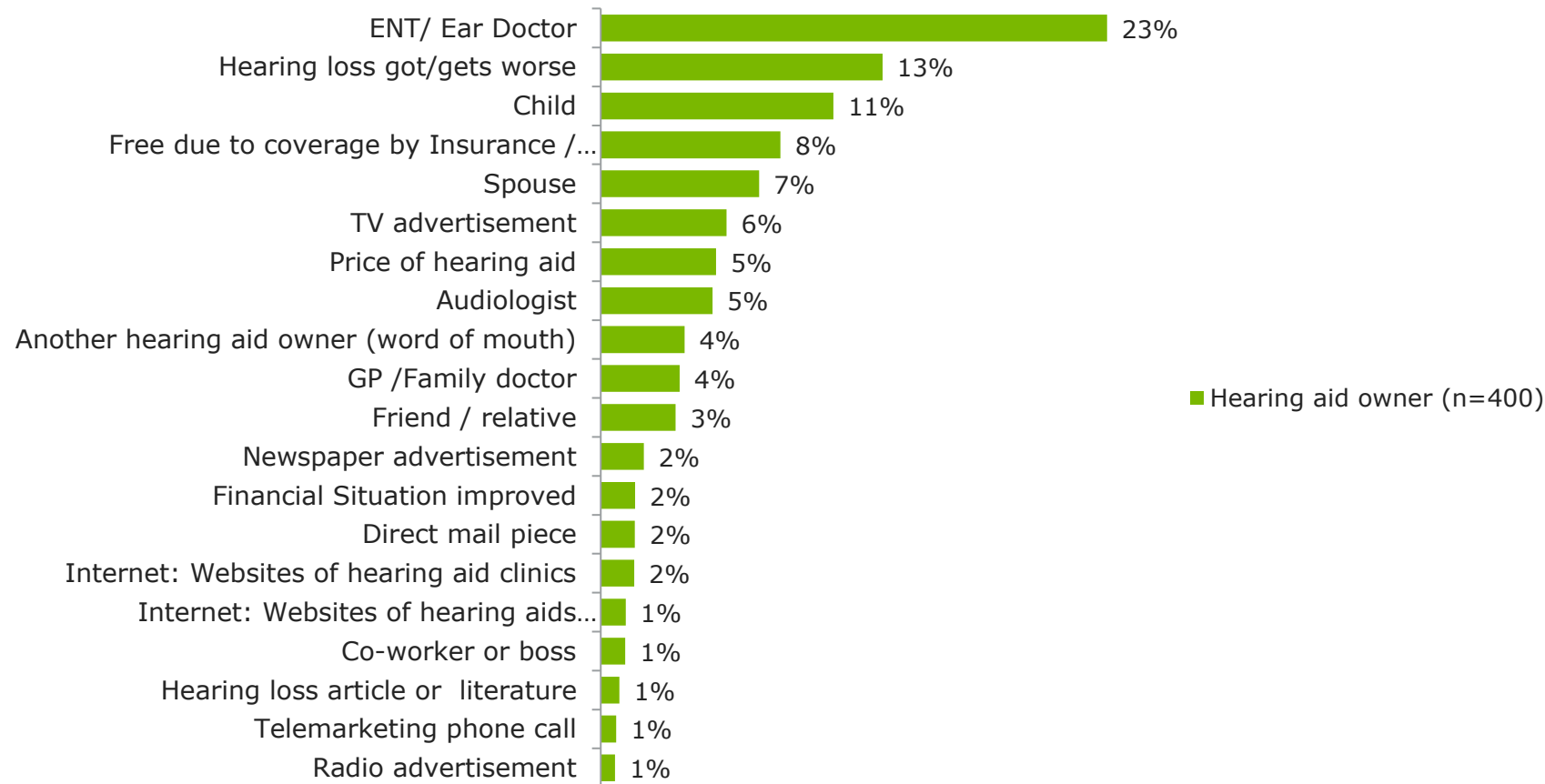
Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?

Non-owner: 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)?





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



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



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



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	7'909	6.0%	39.8%	50.0%	48.5%	55.6%
	Female	7'876	5.8%	33.2%	50.0%	51.5%	44.4%
Age recoded							
	1 - 14	2'032	2.1%	70.3%	13.4%	2.2%	9.0%
	15 - 24	1'848	1.7%	45.5%	12.2%	3.0%	4.3%
	25 - 34	2'104	3.5%	56.4%	13.7%	5.4%	12.1%
	35 - 44	2'433	3.8%	41.7%	15.8%	9.2%	11.4%
	45 - 54	2'546	5.3%	19.1%	16.2%	18.5%	7.6%
	55 - 64	2'431	6.1%	25.0%	15.4%	18.8%	10.8%
	65 - 74	1'340	10.2%	38.3%	8.1%	14.2%	15.3%
	74+	1'051	25.9%	37.1%	5.2%	28.9%	29.6%
Type of household							
	single household	1'230	11.3%	41.2%	7.3%	13.9%	16.8%
	Couple, no kids	1'622	9.2%	39.3%	9.9%	15.4%	17.3%
	Couple with kid(s)	11'036	4.8%	36.5%	70.8%	56.5%	56.2%
	Single mom/dad with kid(s)	698	4.6%	28.5%	4.5%	3.9%	2.7%
	Retirement home, hospital etc.	104	23.6%	38.3%	0.5%	2.6%	2.8%
	Other	1'095	5.6%	23.8%	7.0%	7.8%	4.3%
Status							
The head of the household (alone or together with someone)		5'647	9.3%	37.5%	34.5%	55.5%	57.7%
The spouse of the head of the household		3'988	6.4%	32.3%	25.1%	29.0%	24.0%
Daughter/son of head of household		5'361	1.5%	50.5%	35.5%	6.9%	12.2%
Other person		789	9.1%	29.2%	4.8%	8.6%	6.2%

Demographics (2) Hearing instrument adoption rates and populations

				Profiles: Categories add to 100%*		
				No hearing loss	Hearing loss but no hearing aid	Hearing aid
Employment						
	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)			
Full time employed	6'316	4.8%	30.0%	47.4%	36.7%	29.4%
Part time employed	1'262	5.9%	42.1%	9.3%	7.5%	10.2%
Unemployed / retired	4'351	11.2%	36.9%	30.4%	53.2%	58.3%
Student / pupil / in training	1'657	1.3%	30.3%	12.9%	2.6%	2.1%
Education						
Elementary School	590	19.2%	34.3%	3.8%	12.9%	12.6%
Middle School	742	12.0%	38.5%	5.1%	9.5%	11.1%
High school	3'632	6.5%	34.5%	26.8%	26.6%	26.2%
Polytechnic University	270	10.3%	53.4%	1.9%	2.2%	4.8%
University	8'032	4.8%	33.7%	60.2%	44.4%	42.3%
Other	319	10.8%	27.1%	2.2%	4.3%	3.0%