





#### Results APAC Trak

## JapanTrak 2022

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









#### Japan-specific observations 2022

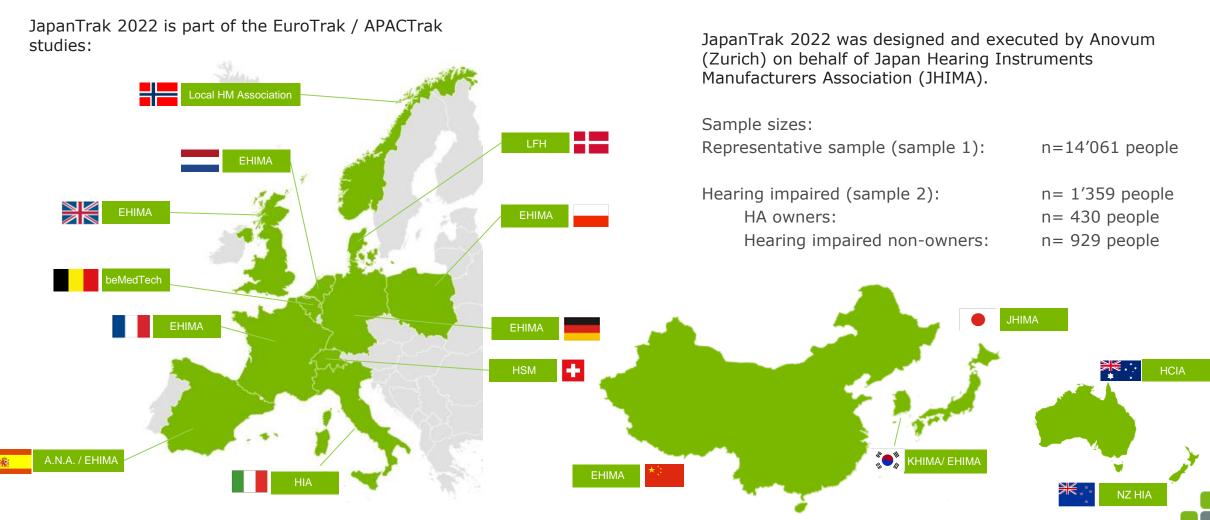
- Adoption rate in % of self-stated hearing impaired is slightly increasing but still low compared to internationally
- Binaural fitting rate is on a similarly low level in Japan as in 2018 while binaural fitted hearing impaired are more satisfied with their hearing aids than monaural fitted.
- Satisfaction with hearing aids
  - bought on the internet is still the lowest (but has increased since 2018).
  - fitted by a Nintei-Hocyouki-Ginousya (certified HA technician) is much higher than those not provided by them.
- Satisfaction with hearing aids has increased since 2018.
- Compared to 2018, there is a
  - significant increase in satisfaction with medical HA devices,
  - especially with those hearing aids fitted by Nintei-Hocyouki-Ginousya (certified HA technician). These devices have a much-improved sound quality and speech understanding.
  - → Certified HA technicians seem to fit better devices and can leverage the performance of improved devices.







## Summary 1. Introduction









## Summary 2. Market overview

- Stated hearing loss prevalence
  - Total: 10.0%, 18+: 11.6 % (2018: 11.3 18+: 13.2%).
  - Hearing Tests: 51% (2018: 53%) had a hearing test in the last 5 years, and Doctors did most tests.
- Hearing aid adoption rate (HA penetration)
  - 15.2% of those with self-declared HL (2018: 14.4%).
  - 1.5% of total population (2018: 1.6%).
  - 43% of HA owners have binaural treatment (2018: 45%).
- The route to the hearing aid
  - Only 38% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - Only 14% got hearing aids recommended from the ENT or family doctor (drop out rate=63% / 2018: 66%).
  - 53% of the GP consultations recommended no further action (2018: 56%).
  - 63% of the ENT consultations recommended no further action (2018: 67%).
  - 95% of the Hearing aid dispensers/Audiologists recommended getting a hearing aid (2018 88%).
- 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 the hearing impaired use hearing aids.
  - Hearing aid owners are less exhausted in the evening.







### Summary

#### 3. Analysis of hearing aid owners

- Hearing aid ownership, usage, and accessories
  - Only 8% of all HA owners received some 3rd party reimbursement.
  - 67% of owned HAs were bought in 2019 or later.
  - The average age of the currently owned HAs is 3.8 years.
  - The median age of hearing aids before replacement is 4 years.
  - On average, HAs are worn 6.5 hours a day.
  - RIC is the most often purchased type of HA.
  - Cochlear Implants: 32% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
  - 13% of HA owners use a hearing aids app, and 76% are satisfied with it.
  - 6% of the HAs are (to the knowledge of the owners) equipped with Telecoil.
- Importance of listening situations and satisfaction with HAs
  - 67% of the hearing aid owners say their hearing aid works better than or as expected
  - 50% of the HA owners are satisfied with their HAs (2018: 38%).
  - The more hours wore per day, the higher the satisfaction with the HA.
  - Satisfaction with newer hearing aids is higher than with older hearing aids.
  - Talking at home and on the phone, watching TV, and conversing are the most important listening situations.
- Positive impact of HAs
  - Significant positive impact of HAs on different aspects: Especially "sense of safety", "ability to communicate more effectively" and "feelings about yourself" improved
  - 97% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
  - 77% of the hearing aid owners feel more confident moving in a city since wearing hearing aids.







### Summary

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

- Reasons not to own/use HAs
  - Only 8% of the hearing impaired without hearing aids know the government's system of supplying hearing aid(s).
  - The main reasons for not using hearing aids are that people say they are uncomfortable, their hearing loss is not severe enough, and they do not restore hearing to normal.
  - 12% who own hearing aids don't use them at all (0 hours); 24% use them less than one hour/day (0-1 hour).
- Social rejection and triggers to buy
  - 75% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid.
  - The most important influencing factors are worsening hearing loss, ENT, and significant others (and: price for non owners)









#### Detailed Results: Roadmap

#### 1. Introduction

- Organisation of JapanTrak 2022
- 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, 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 hearing aid apps, Telecoil
- 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 JapanTrak 2022

#### **Organization**

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

#### Use of the data

- The principal and the JHIMA companies may use the anonymously delivered tables, charts, reports, and conclusions of the survey for further research projects, archiving, and publication in any form whatsoever.
- The raw dataset remains at Anovum. Suppose the principal or the JHIMA companies use the anonymous data (delivered tables, charts, reports) and survey conclusions for publications. In that case, the source of the data needs to be mentioned in the following way:
  - "Source: Anovum JapanTrak 2022/n=[relevant sample size]."
- The principal and JHIMA companies can ask Anovum to further analyze the raw data in specific ways at their own expense.







### Recruitment process: In search of hearing impaired people

#### **Step 1: Screening interviews**

Objective: Prevalence of hearing loss and hearing aid ownership

#### Process:

- 1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)
- 2. Contacts from large panellist pools
- 3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
- 4. Result: Representative sample of n=14'061 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= 430** hearing aid owners and **n=929** hearing impaired non-owners







### 2. Market overview









Prevalence of hearing loss and adoption rate

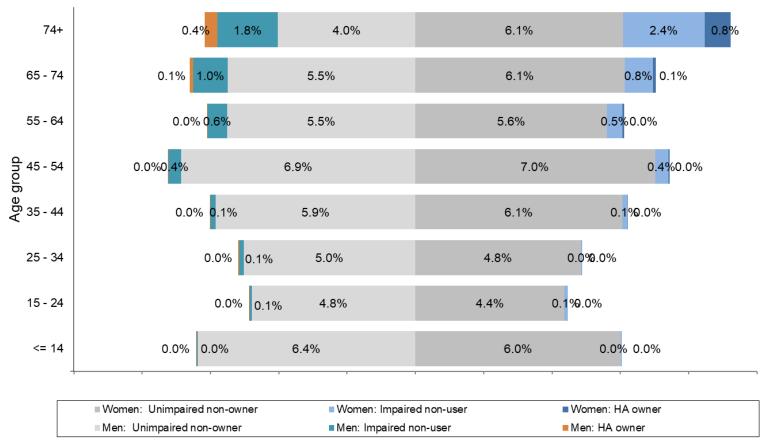








### Hearing loss and hearing instrument ownership by gender/age



n=14'061



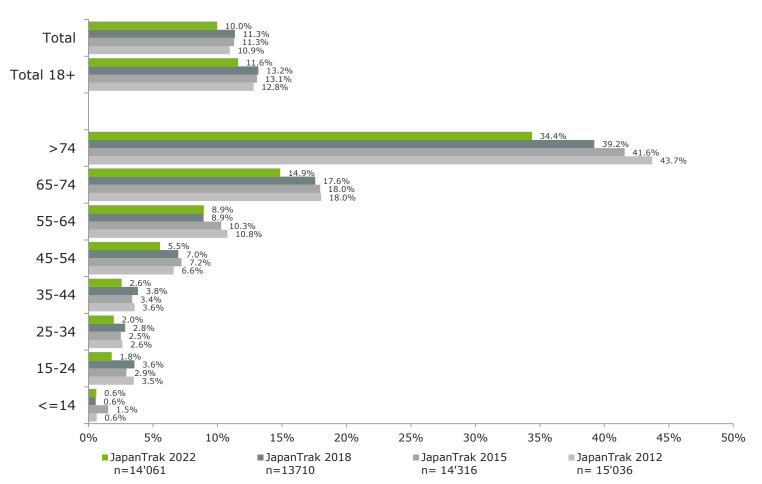






### Hearing loss prevalence Self declared hearing loss

#### % hearing loss prevalence



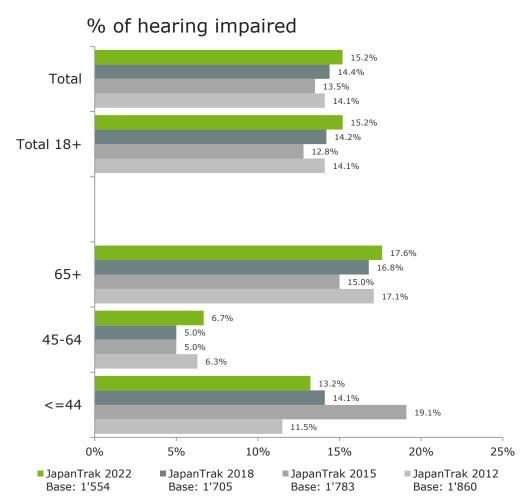








## Hearing aid adoption rate: 15% of hearing impaired have hearing aid(s), 43% of them have binaural treatment





JapanTrak 2018 HA owners (Base:224 - step1) JapanTrak 2022 HA owners (Base:224 – step1)

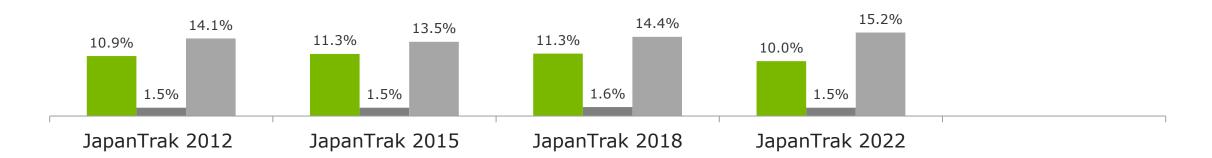








### Overview hearing loss prevalence and hearing aid adoption



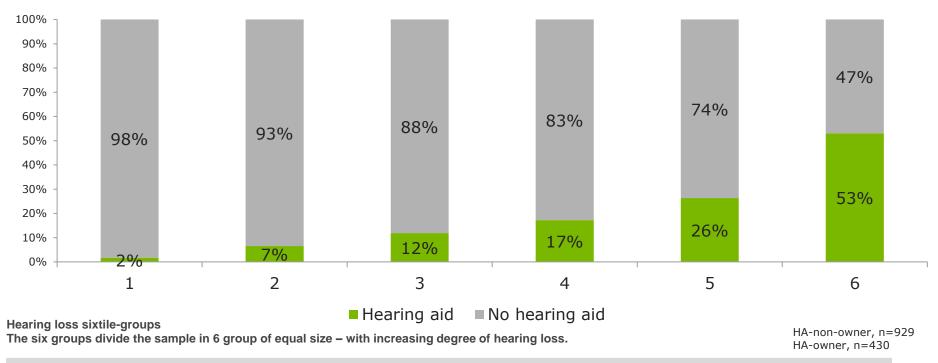
■ Hearing impaired (stated) ■ HA Adoption rate (people with hearing aids in % of population) ■ HA Adoption rate (people with hearing impaired)







### 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).

ige 17







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

	HA-Non-owner n=929	HA Owner n=430	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	39%	28%	13%
Bilateral loss	61%	72%	20%
Perceived loss			
Mild	46%	27%	11%
Moderate	50%	55%	18%
Severe	2%	16%	48%*
Profound	2%	2%	

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







Hearing tests and where hearing is tested

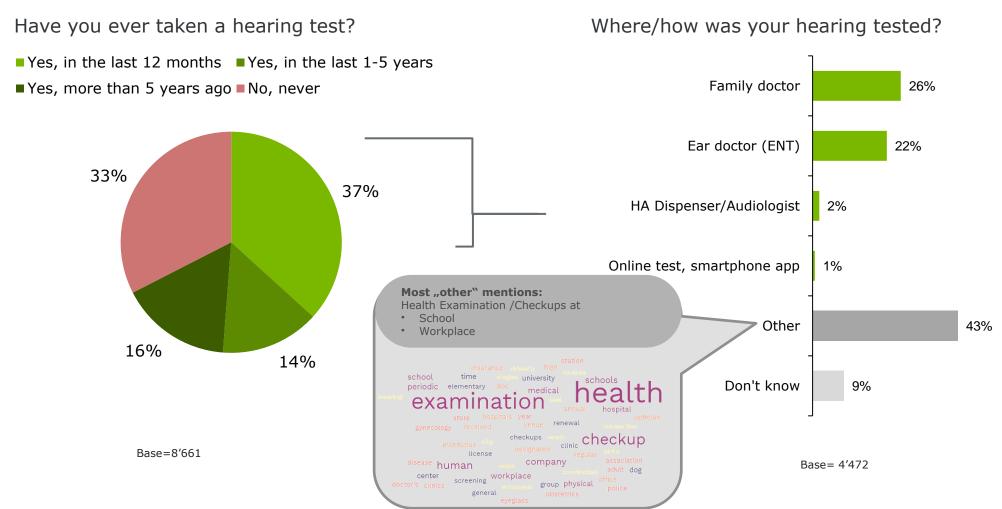








## Hearing Tests: 51% had a hearing test in the last 5 years (2018: 53%), and Doctors did most tests









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



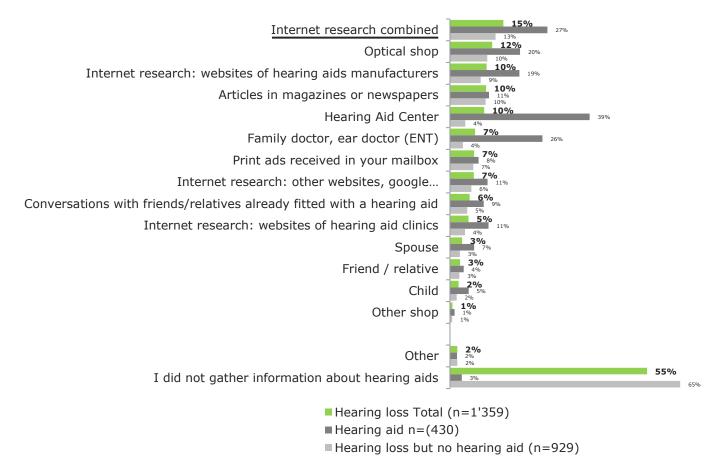






# Hearing aid centers, doctors, and optical shops are major gatekeepers but also the internet is a very important source of information – the most important for non-owners

Where did you gather information about hearing aids?



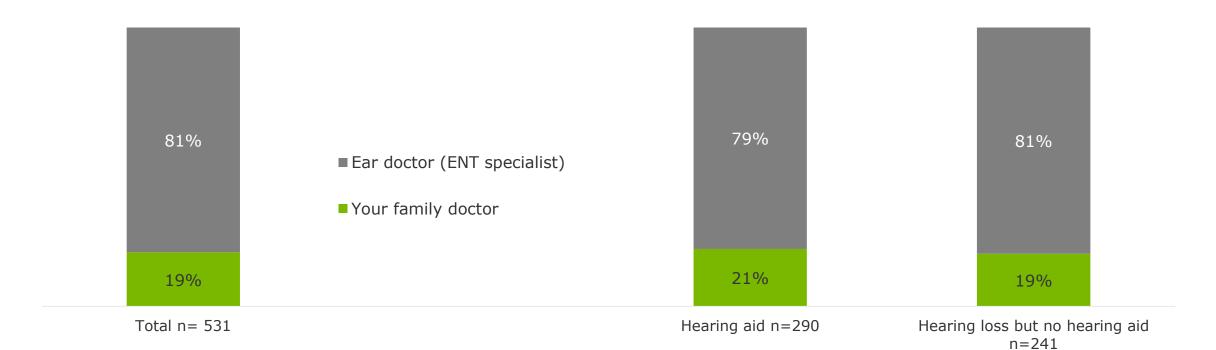






## Of those who discussed the hearing loss with a doctor, 19% talked to a family doctor (GP) first and 81% talked to an ENT first

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 Ear, Nose and Throat specialist (ENT)?

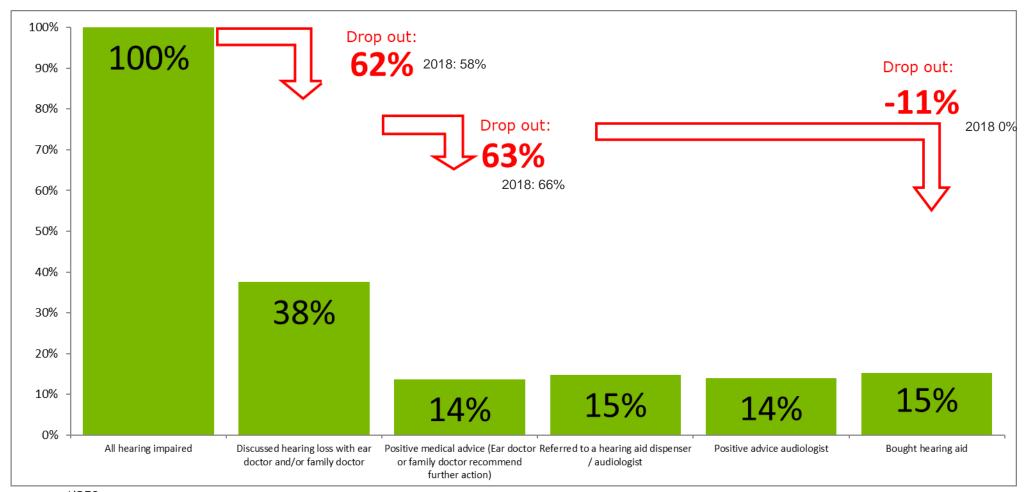








### The route to the hearing aid



n=1'359

Hearing aid dispenser was asked in general without any further specification



Page 24

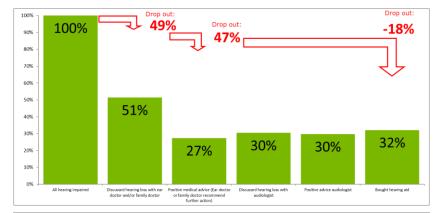




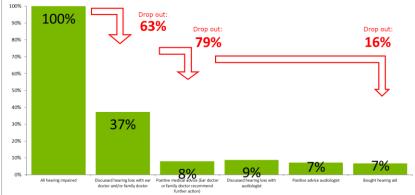


### Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss\*



Low 50% hearing loss\*



n=1'359

- \* 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).

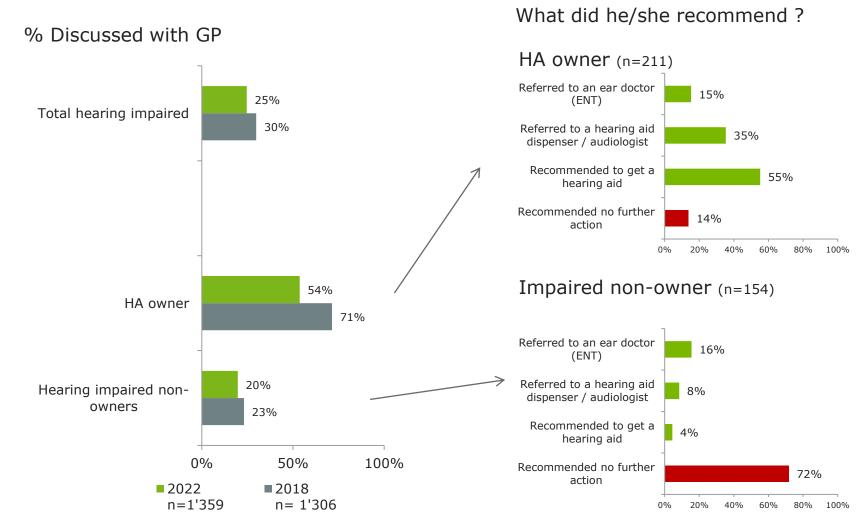
Hearing aid dispenser was asked in general without any further specification







## The route to the hearing aid: GP/Family doctor Have you discussed your hearing problem with your family doctor?

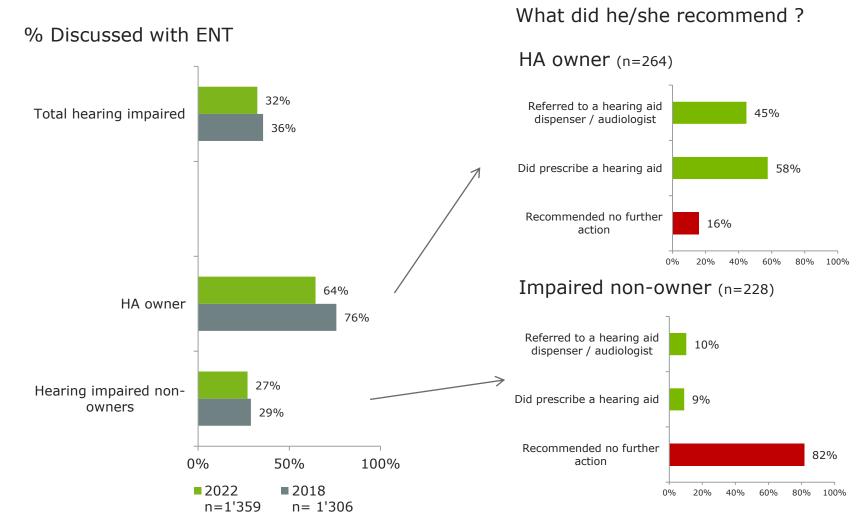








# The route to the hearing aid: ENT Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?



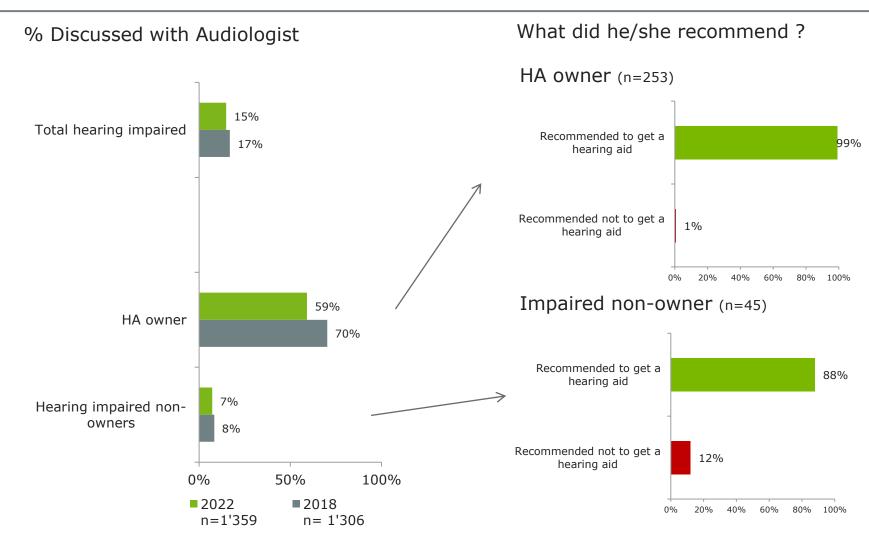






## The route to the hearing aid: Audiologist

Have you ever discussed your hearing problem with a HA dispenser / Audiologist?



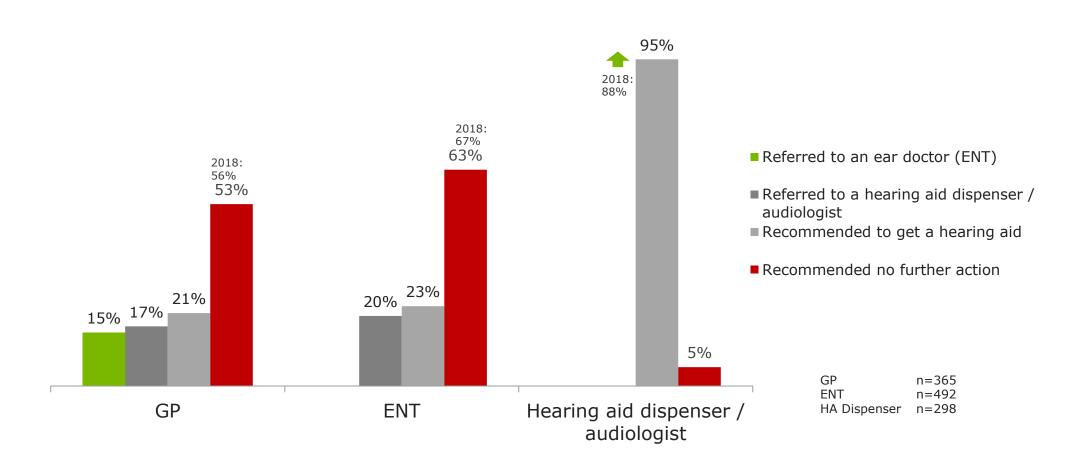
28







## Recommendations by profession



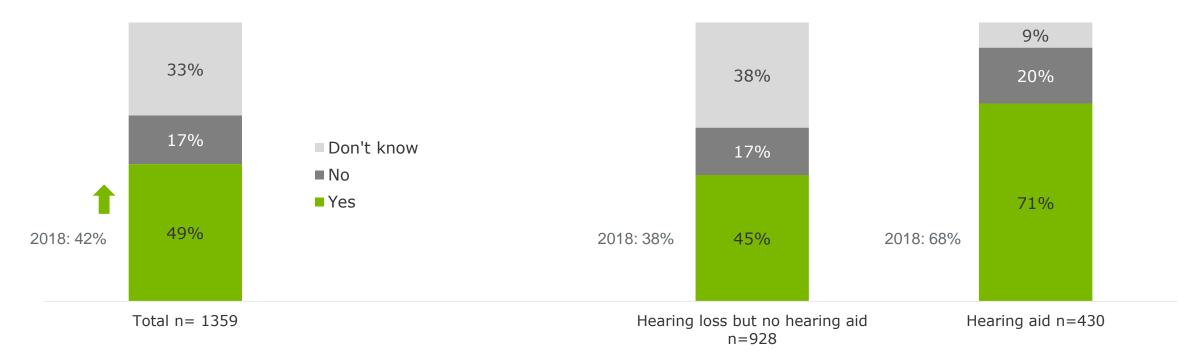






### Awareness of hearing aid shops is increasing slightly

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



Japan specific question

Unweighted Sample Size = 1359

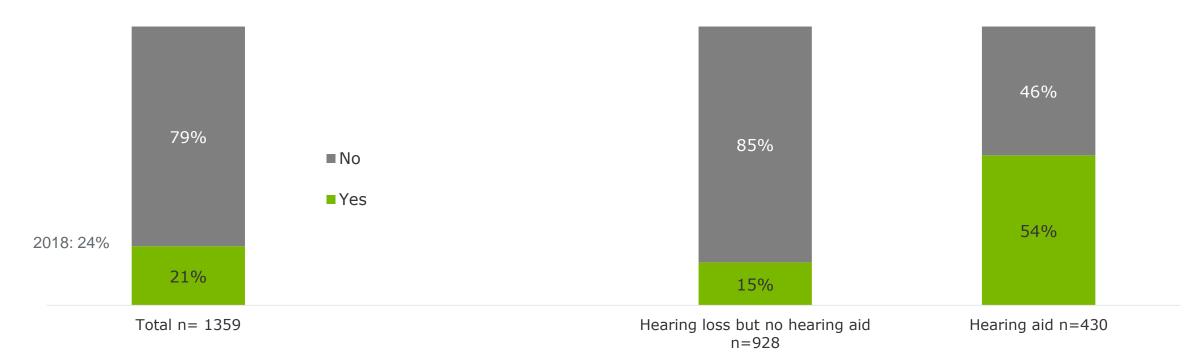






## Only 21% of the hearing impaired knows what a certified hearing aid shop is

Do you know, what the following expressions mean? Nintei - Hocyouki - Senmon - Ten ("certified hearing aid shop")



Japan specific question

Unweighted Sample Size = 1359

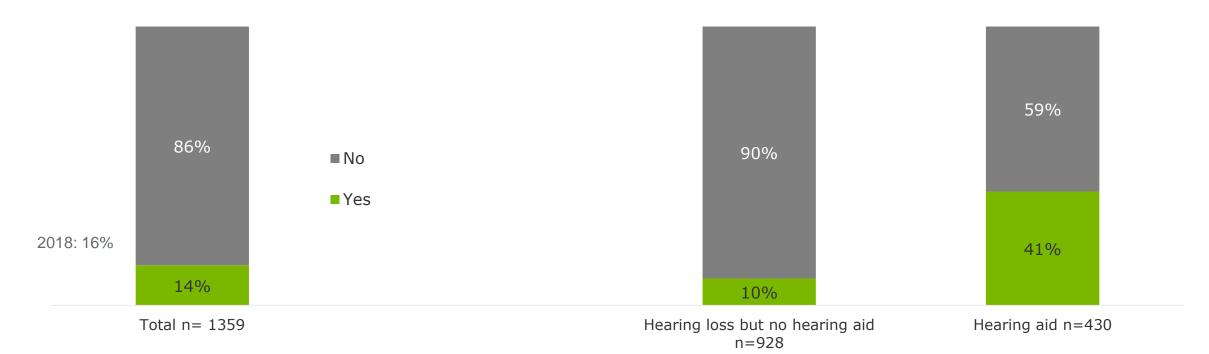






## Only 14% of the hearing impaired knows what a certified hearing aid worker is

Do you know, what the following expressions mean? Nintei - Hocyouki - Ginou - Sha ("certified hearing aid worker")



Japan specific question

Unweighted Sample Size = 1359

Page 32

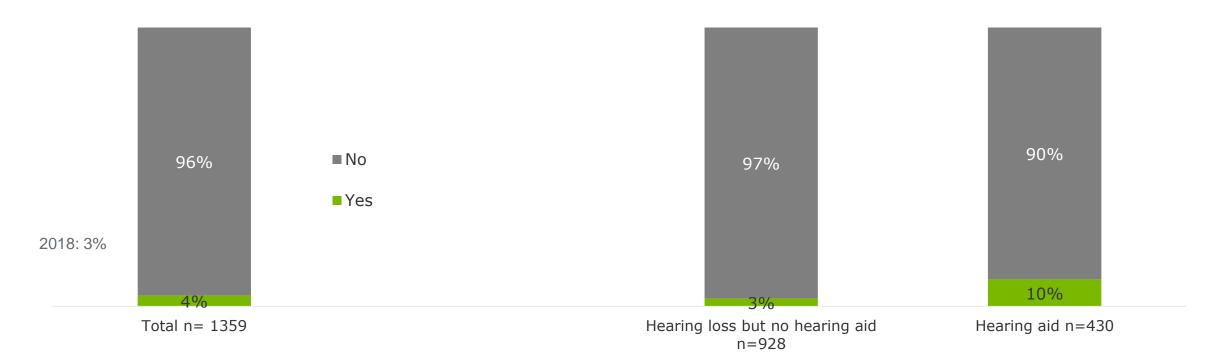






## Only 4% of the hearing impaired knows what a the association of technical aids is

Do you know, what the following expressions mean? Techno-aid-kyoukai ("association of technical aids")



Unweighted Sample Size = 1359

Japan specific question







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



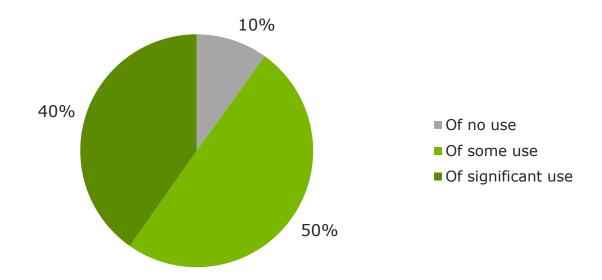






## Work competitiveness: 90% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?



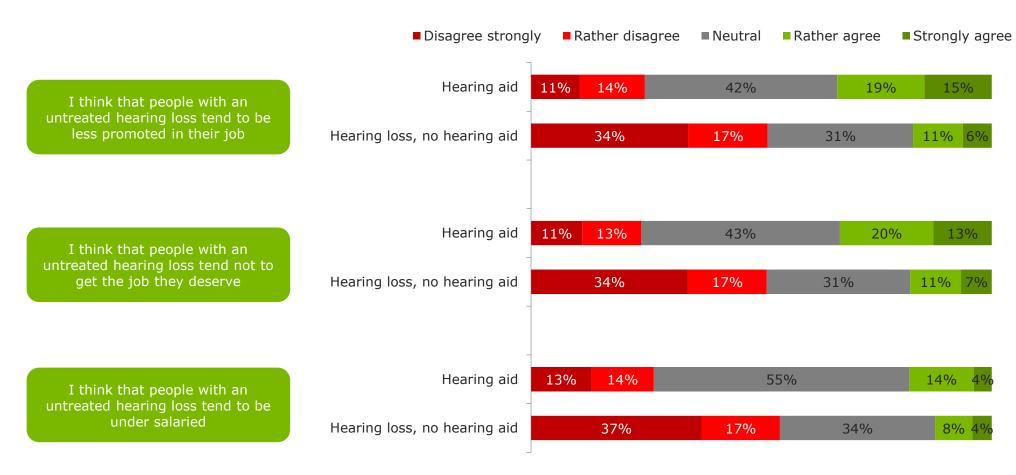
n=77







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 n=794/ hearing aid n=377





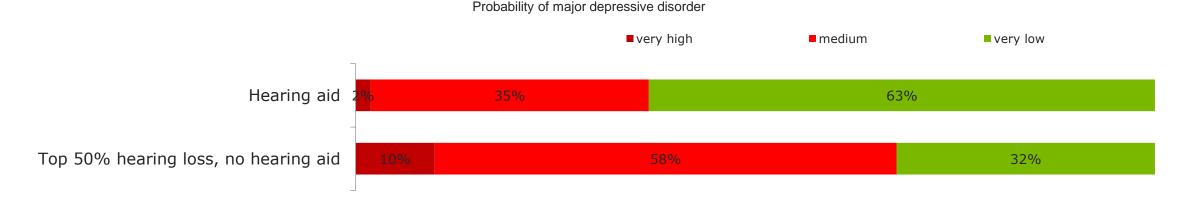


# General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group\*).

# Depression symptoms: PHQ-2 Screening:\*

In the last 2 weeks:

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



Base: hearing aid n=344 / top 50% HL, no hearing aid =159

\*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).



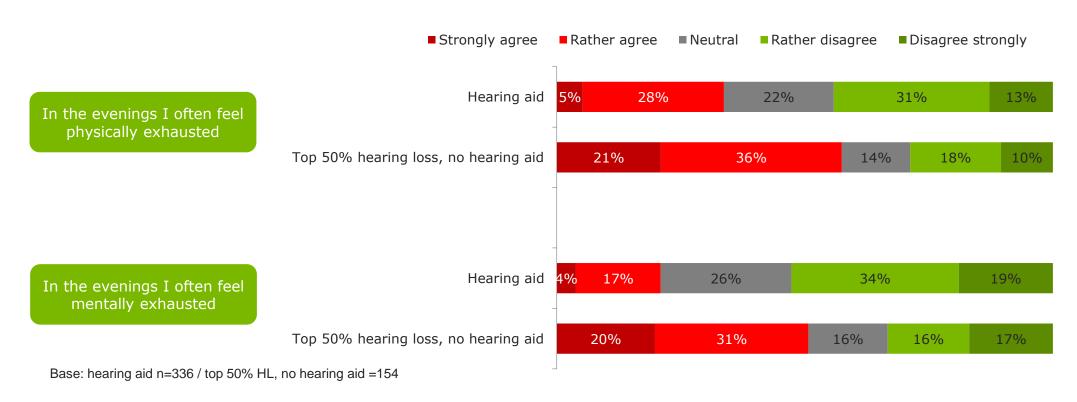
<sup>\*</sup> Scale was changed compared to 2018. In 2018 answer categories (% higher probability for depression) : Hearing aid: 12% to Top50% HL no HA: 32%







## General health problems: Compared to impaired hearing aid nonowners with significant hearing loss (Top50% hearing loss group\*), hearing aid owners feel 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
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Page 38

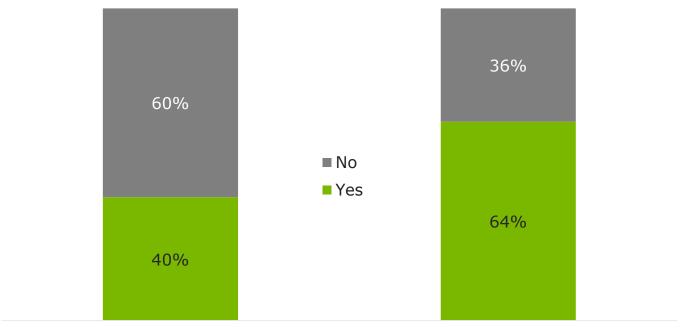






# General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?



Top 50% hearing loss, no hearing aid

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Hearing aid

Base: Top 50% HL, no hearing aid n=159 / top 50% HL, Hearing aid =344  $\,$ 

Page 39



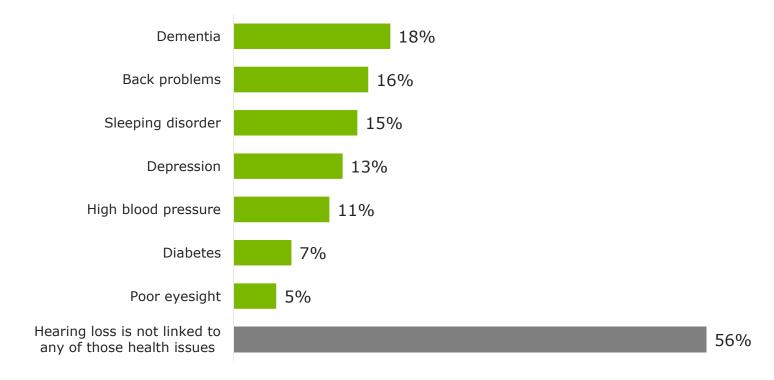






# Between 13% and 18% of the hearing impaired think that hearing loss could be linked to depression, sleeping disorders, dementia, or back problems/stiff neck

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



Hearing impaired, n=1359

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# 3. Analysis of hearing aid owners









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

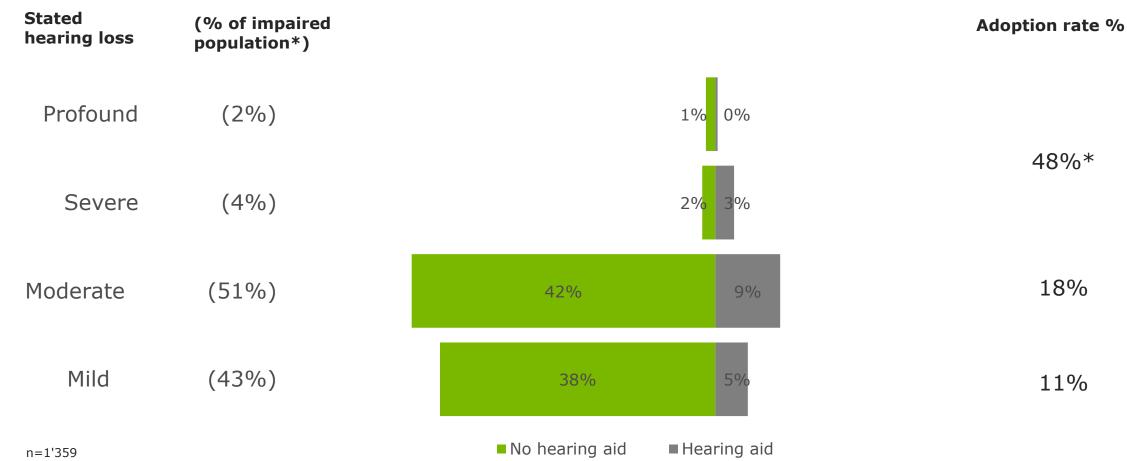








### Low adoption rates within mild hearing loss



Sums can differ from 100% due to rounding \* combined "severe" and "profound" because n is too small

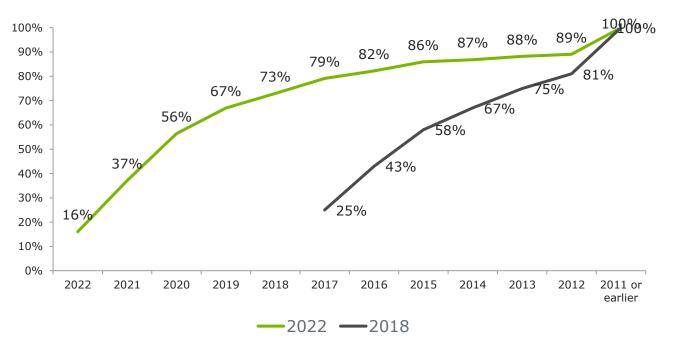






# 67% of the currently owned HAs were acquired in 2019 or later RIC is the most often purchased type of HA.

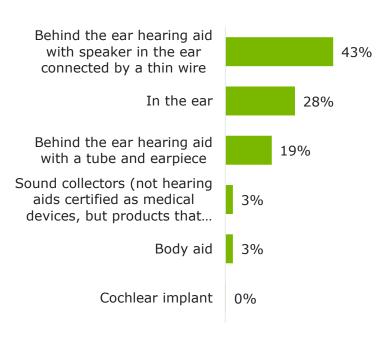
#### Year of purchase



Age of currently owned HAs (Mean):

2022: 3.8 years 2018: 3.5 years

#### Type of HA



HA-owner, n=430



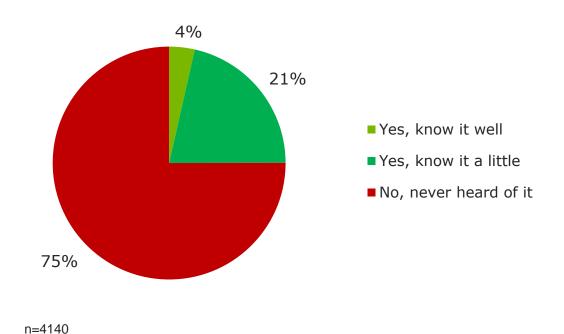




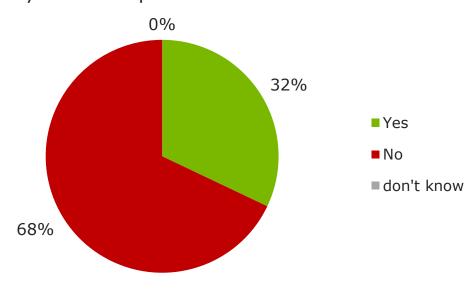


# 75% of the population in Japan have never heard of Cochlear Implants. 1/3 of the HA owners with severe/profound HL have been informed about CIs by a medical professional.

Do you know what a cochlear implant (CI) is?



Have you been informed about cochlear implants by a medical professional?



Low n=26 (HA owners with self-declared severe/profound HL)

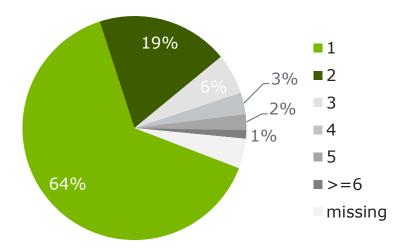






### 64% are first time users, 19% own hearing aids for the second time

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



Base: N=430

question

Seite 46

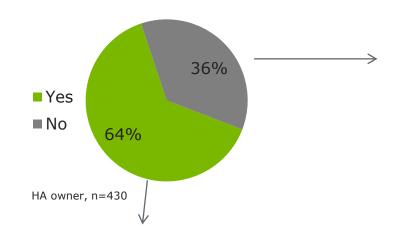




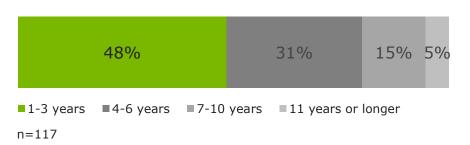


## Hearing aids are used for 4 years before they are replaced. On average About 2-3 years pass between becoming aware of the hearing loss and the purchase of hearing aids.





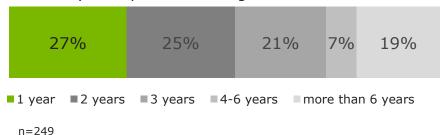
How many years did you own your previous HAs?



Age of HA before it has been replaced: 2022: 4 years (median) 2018: 5 years (median)

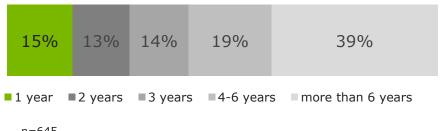
#### HA owners (1st HA):

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?



#### **HA** non owners:

How many years had passed since you became aware of your hearing loss?



n = 645

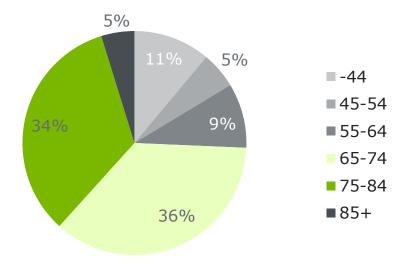






# People are around 72 years old when they feel the need for a hearing aid

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



Median: 72 years (2018:70 years)

Base: N=430

Japan specific question

Seite 48

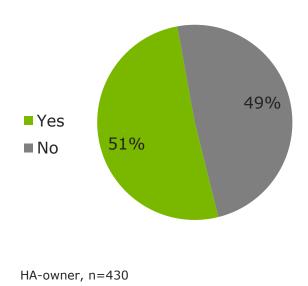






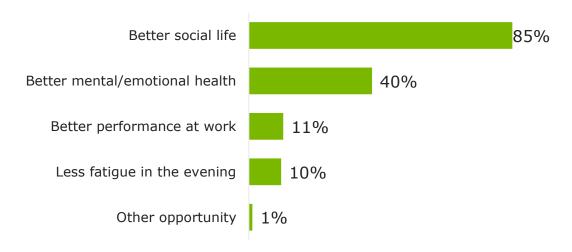
### 51% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

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



#### 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





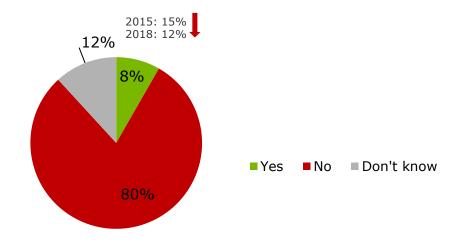


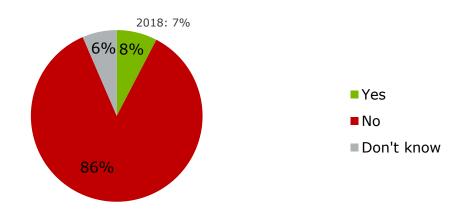


8% received some kind of reimbursement from the government. 8% of non-owners know the system of supplying hearing aid(s) by the government.

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

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





HA-owner, n=430 HA-non-owners, n=929

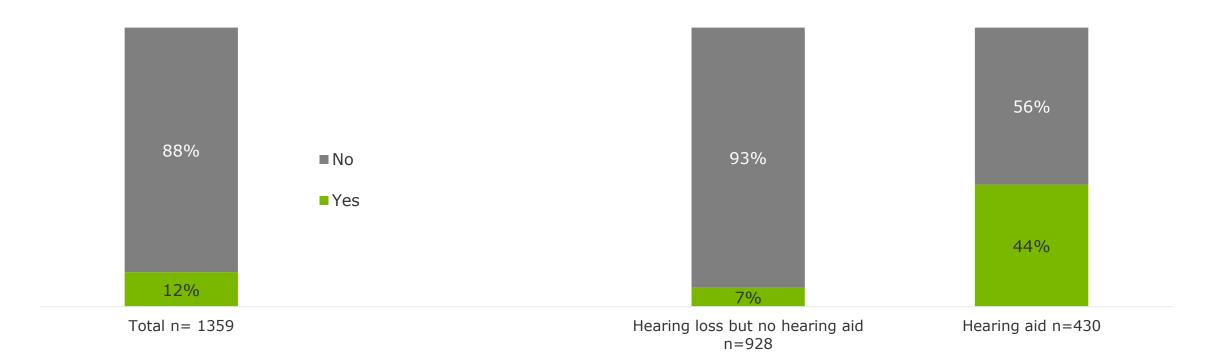






### Generally people are not aware that hearing aids are untaxed articles in the VAT system

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



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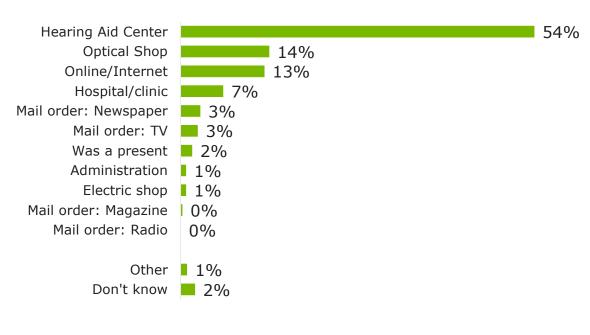




# Most hearing aids are bought in a hearing aid center – followed by optical shops and the internet

#### **OWNERS:**

Where was your most current hearing aid obtained?



HA-owner, n=430

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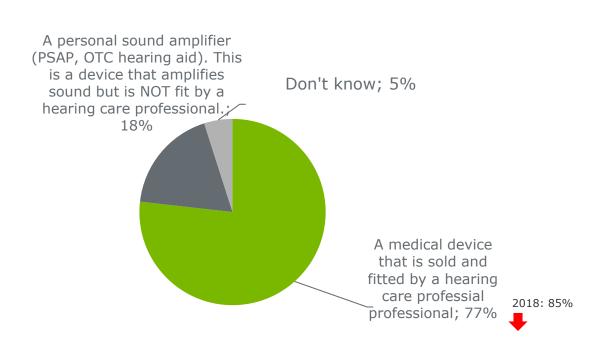




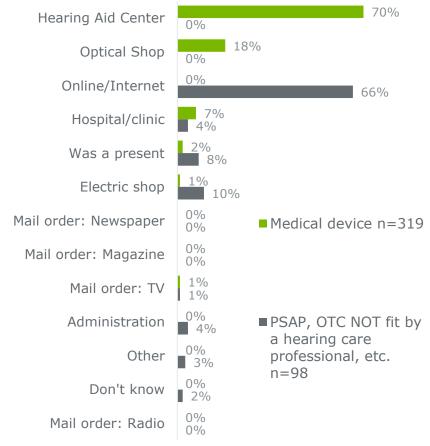


# Most medical devices were sold at a hearing aid center, PSAP's/OTC are sold online

Would you classify your hearing aid as a... N=430



Where was your most current hearing aid purchased?



Japan specific question



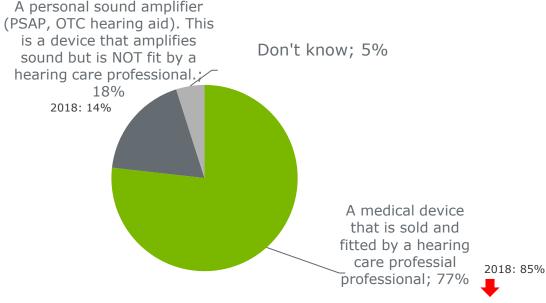


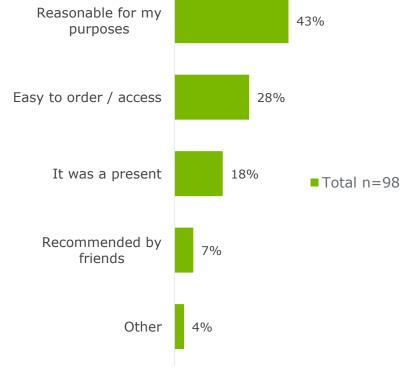


## Those 18% of hearing impaired who own PSAP/OTC hearing aids believe that it is reasonable for their purposes

Would you classify your hearing aid as a... N=430

by a hearing care professional? Reasonable for my 43% purposes A personal sound amplifier





Why did you buy a personal sound amplifier (PSAP, OTC

hearing aid) instead of a medical device sold and fitted

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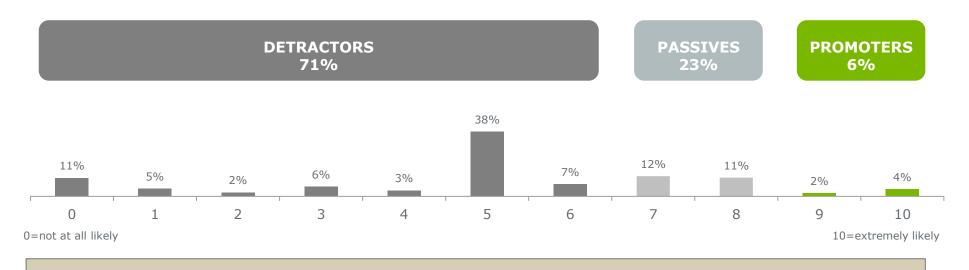






# Recommendation intention of the place where the hearing aid(s) have been obtained: Low NPS score of -65.

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



NPS = PROMOTERS - DETRACTORS = -65 (exact figure rounded)

HA-owner, n=430







# The recommendation intention of the place where the hearing aid(s) have been obtained is low

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

#### **DETRACTORS**

Hearing aid centers: 64% Optical Shop: 75% Online/Internet: 86%

#### **PASSIVES**

28% 23% 13%

#### **PROMOTERS**

9% 1% 1%

#### NPS = PROMOTERS - DETRACTORS (exact figure rounded)

Hearing aid centers: -55 Optical Shop: -74 Online/Internet: -85

Japan specific question

Seite 56

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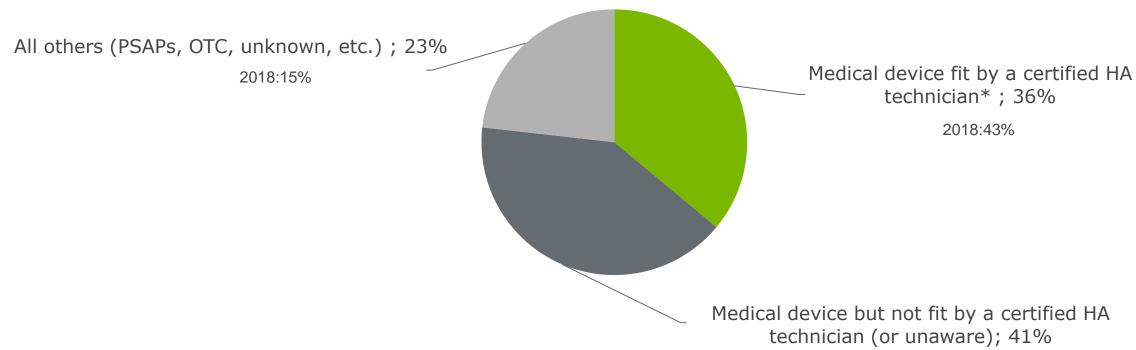




### Categorization of hearing aids

Categorization created by two questions:

- Has Nintei-Hocyouki-Ginousya (certified HA technician) consulted and fitted your hearing aid when you bought it?
- Would you classify your hearing aid as a...
  - A medical device that is sold and fitted by a hearing care professial professional
  - A personal sound amplifier (PSAP, OTC hearing aid). This is a device that amplifies sound but is NOT fit by a hearing care professional.



\*Nintei-Hocyouki-Ginousya

2018:43% n=430

te 57







# The recommendation intention of the place where the hearing aid(s) have been obtained is low

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

#### **DETRACTORS**

Medical device fit by a certified HA technician\*: 56%
Medical device but not fit by a certified HA technician (or unaware): 77%
All others (PSAPs, OTC, unknown, etc.): 85%

#### **PASSIVES**

33% 20% 10%

#### **PROMOTERS**

11% 3% 4%

#### NPS = PROMOTERS - DETRACTORS (exact figure rounded)

Medical device fit by a certified HA technician\*: -45

Medical device but not fit by a certified HA technician (or unaware): -74

All others (PSAPs, OTC, unknown, etc.): -81

Japan specific question

Seite 58

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<sup>\*</sup>Nintei-Hocyouki-Ginousya

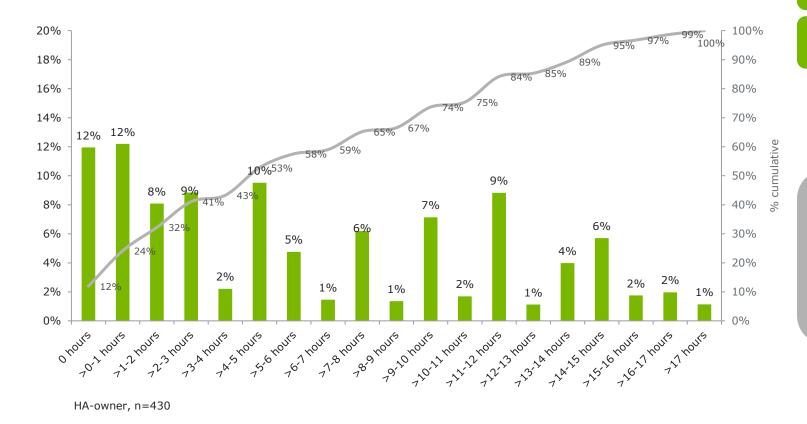






### On average, HAs are worn 6.5 hours a day

#### How many hours a day are HA worn?



HA worn:

2022 Mean: 6.5 hours/day 2018 Mean: 7.6 hours/day

In the drawer (0 hours):

2022: 12% 2018: 7%

#### HA worn:

8.2 hours/day 6.5 hours/day 3.6 hours/day

#### In the drawer (0 hours):

\*Nintei-Hocyouki-Ginousya



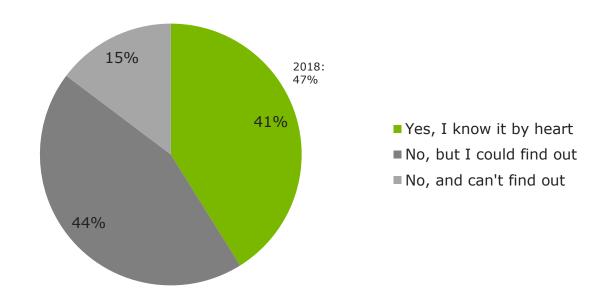






### 41% of today's hearing aid owners are aware of their hearing aid brand

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



HA-owner, n=430







### 13% of HA owners use a hearing aid app, and 76% are satisfied with it

Have you been informed by your hearing care professional about hearing aid apps? (HA owners, n=430)



Do you personally use apps for your hearing aids? (HA owners, n = 430)



#### IF APPS USED (n=55):

Overall, how satisfied with the performance of your apps?



Page 61

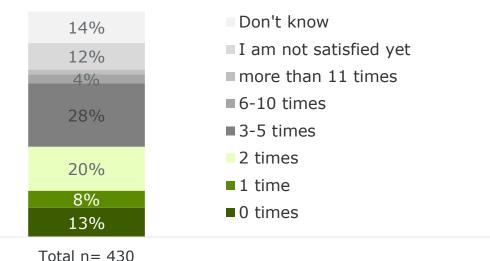


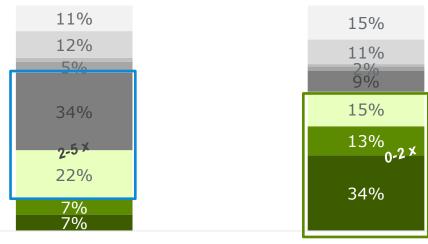




### Hearing aids need to be refitted about several times

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





A medical device that is sold and fitted A personal sound amplifier (PSAP, OTC by a hearing care professial professional n=319 hearing aid). This is a device that amplifies sound but is NOT fit by a hearing care professional. N=98

Japan specific question

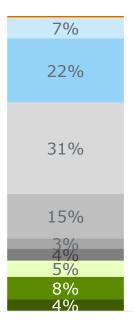






### Most hearing aids cost between 100'000 and 300'000 yen

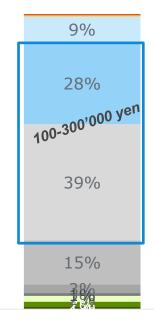
How much have you paid for your hearing aids (PER EAR)

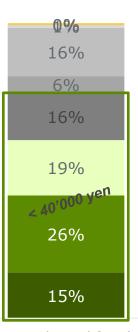


400,001 - 500,000 yen ■ 300,001 - 400,000 yen ■ 200,001 - 300,000 yen ■ 100,001 -200,000 yen ■ 50,001 -100,000 yen ■ 40,001 -50,000 yen

■ More than 500,000 yen

- 30,001 -40,000 yen 20,001 -30,000 yen
- 10,001 -20,000 yen
- Less than 10,000 yen





Total n=320

A medical device that is sold and fitted A personal sound amplifier (PSAP, OTC by a hearing care professial professional n=243

hearing aid). This is a device that amplifies sound but is NOT fit by a hearing care professional. N=46



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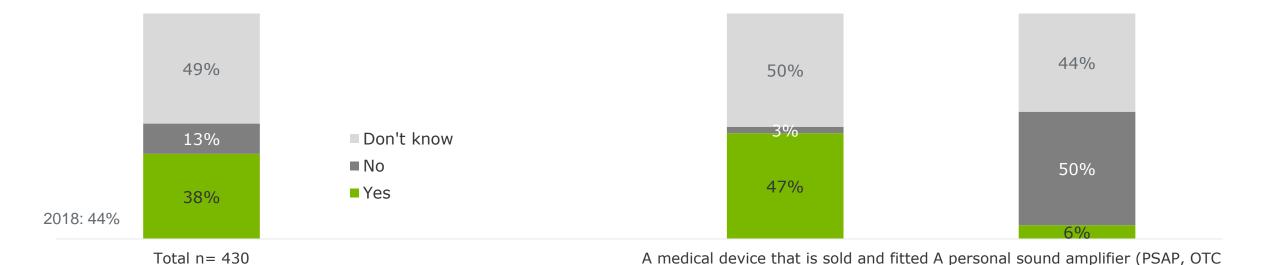






# 38% are aware that a certified hearing aid technician fitted the hearing aids

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



by a hearing care professial professional n=319

Japan specific question

hearing aid). This is a device that

amplifies sound but is NOT fit by a hearing care professional. N=98

Unweighted Sample Size = 1359

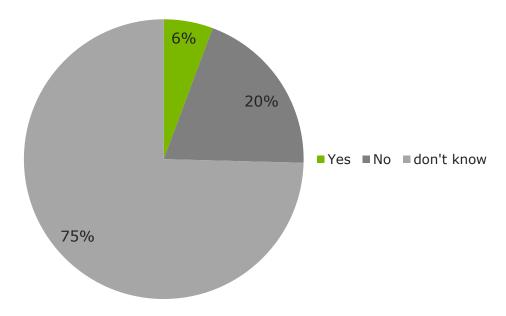






### Most do not know what Telecoil is

### Are your hearing aids equipped with Telecoil?



HA-owner, n=430

Telecoil follow-up questions from ET 22 not asked in JAPAN

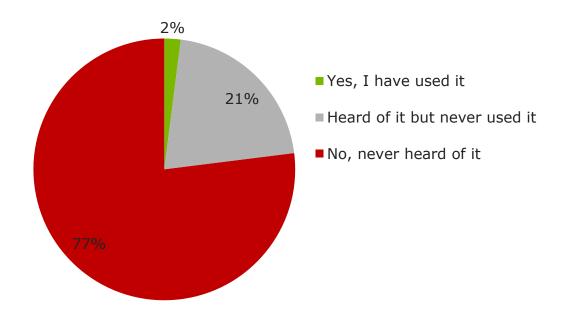






# Only 2% of the HA owners say they have used remote fitting, 21% have at least heard of it, and 77% have never heard of it

Have you ever heard of <u>Remote fitting</u> for your hearing aids? (Remote fitting: enables your hearing care professional to fit and fine-tune hearing aids from a distance (in real-time via video chat via an app), so that you don't need to leave your house to get your hearing aids adjusted)



HA-owner, n=430







## Satisfaction with hearing aids and drivers



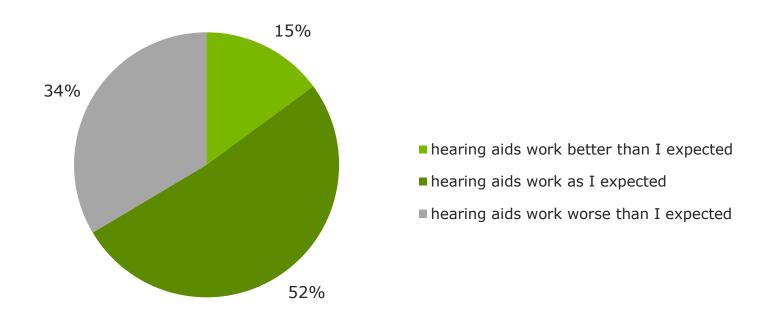






# 67% of the hearing aid owners say their hearing aid works better than or as expected

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



n=430

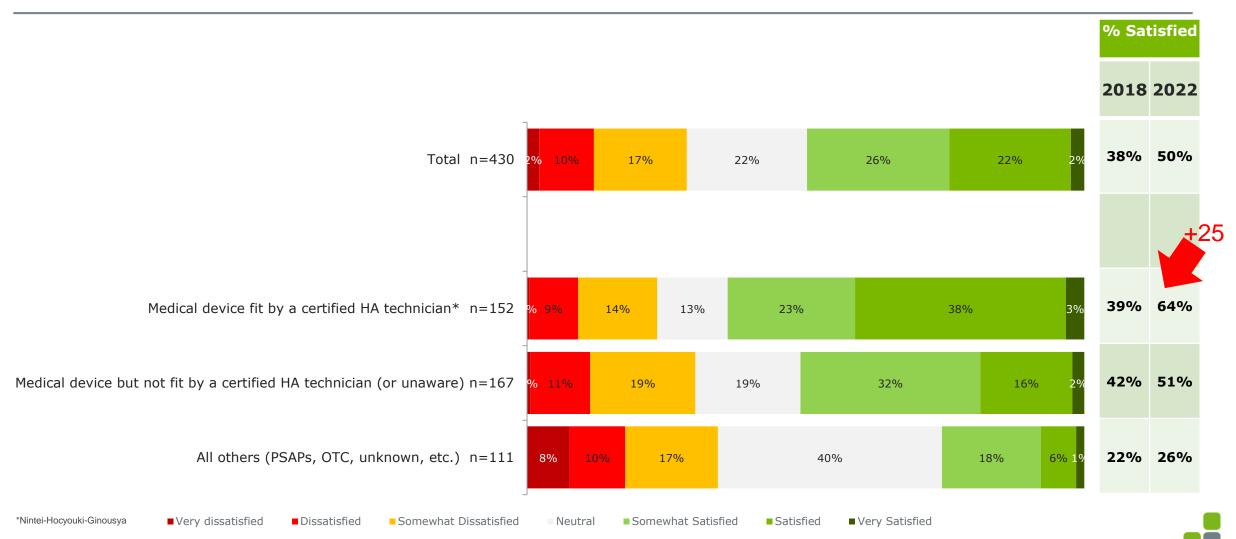








# Overall satisfaction with HA: 50% of hearing aid owners are satisfied with their hearing aid(s)

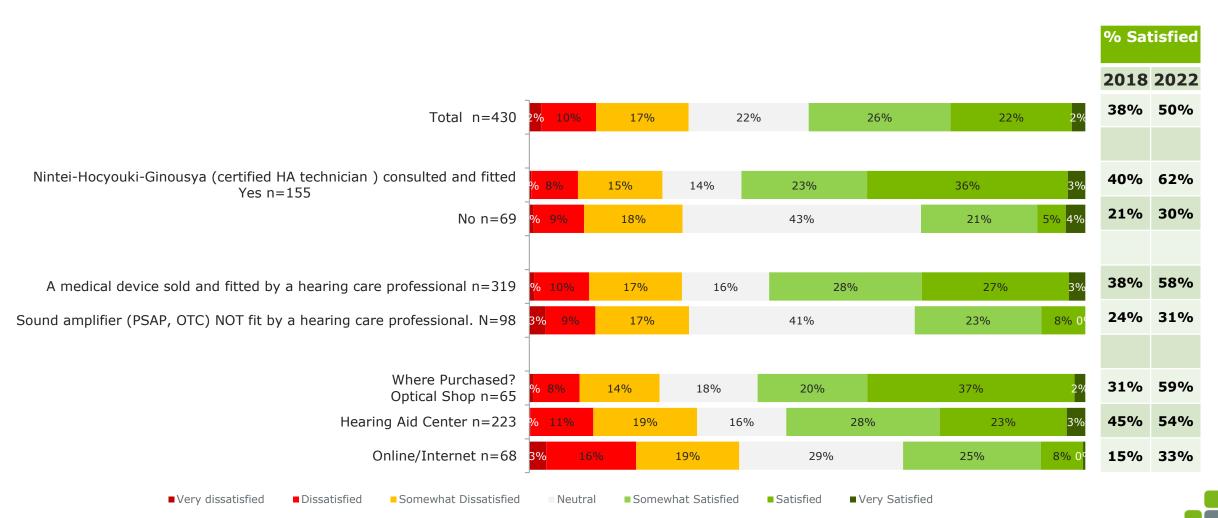








# Overall satisfaction with HA: 50% of hearing aid owners are satisfied with their hearing aid(s)

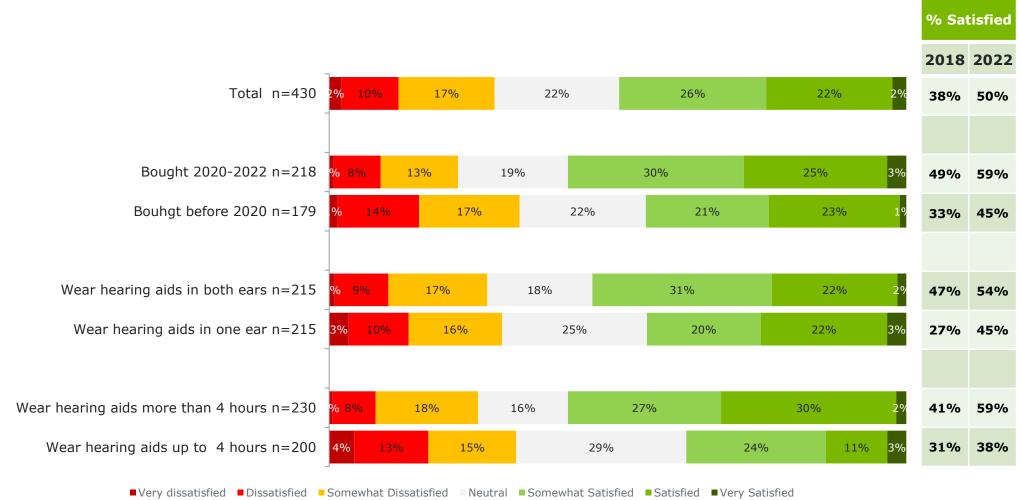








# Overall satisfaction with HA: 50% of hearing aid owners are satisfied with their hearing aid(s)

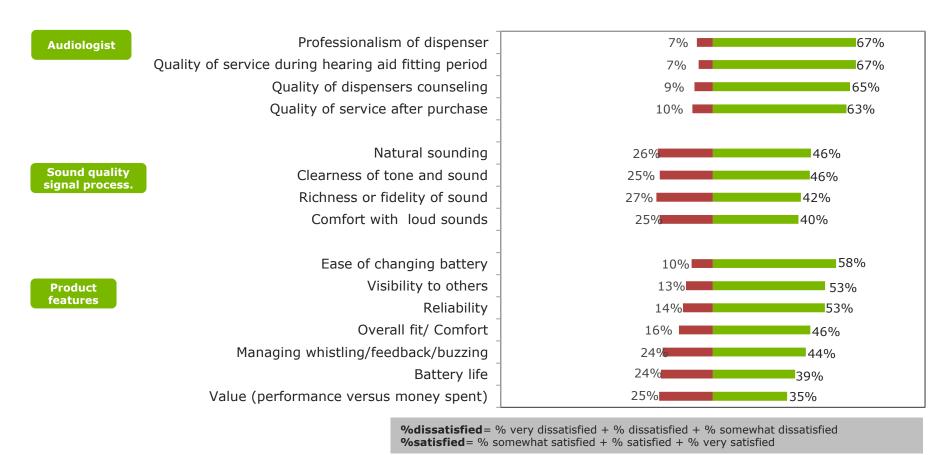








### Satisfaction with current hearing aids



Trend\* +6% +5% +5% +4% +15% +12% +10% +6% +15% +5% +3% +5% +4% +10% +1%

HA-owner, n=430

\*% of satisfied HA owners compared to 2018

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dissatisfied

satisfied

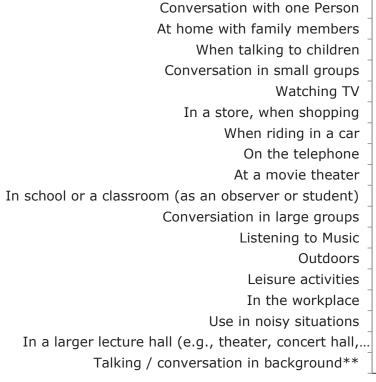


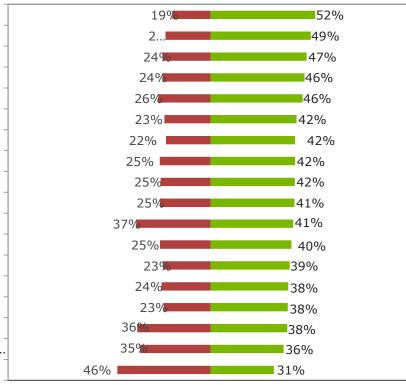


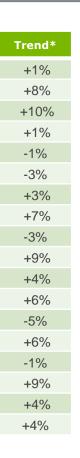


#### Satisfaction with current hearing aids

Listening situations







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

dissatisfied satisfied

HA-owner, n=430



<sup>\*%</sup> of satisfied HA owners compared to 2018

<sup>\*\*</sup> JapanTrak specific

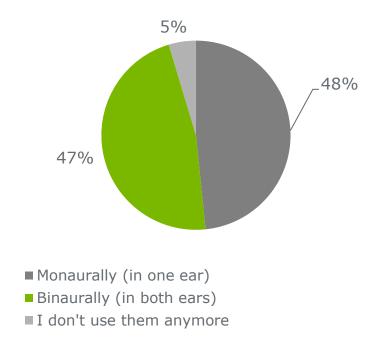




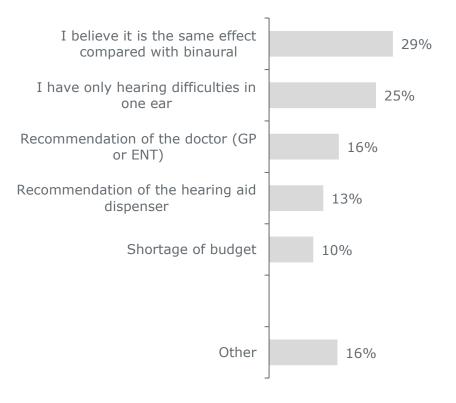


#### Most people with only one hearing aid believe it is the same effect compared with two hearing aids

Do you wear hearing aids monaurally or binaurally? N=430



What are the reasons why you wear hearing aids only in one ear (monaural)? N = 211



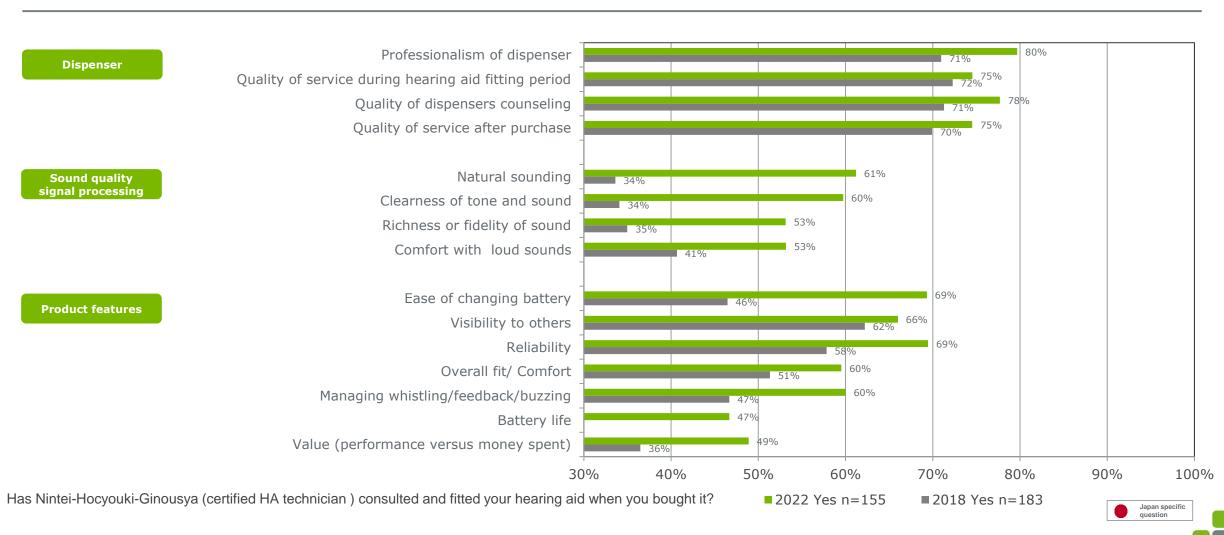
Seite 74







### Satisfaction trend 2018-2022 for those devices fitted by Nintei-Hocyouki-Ginousya (certified HA technician )

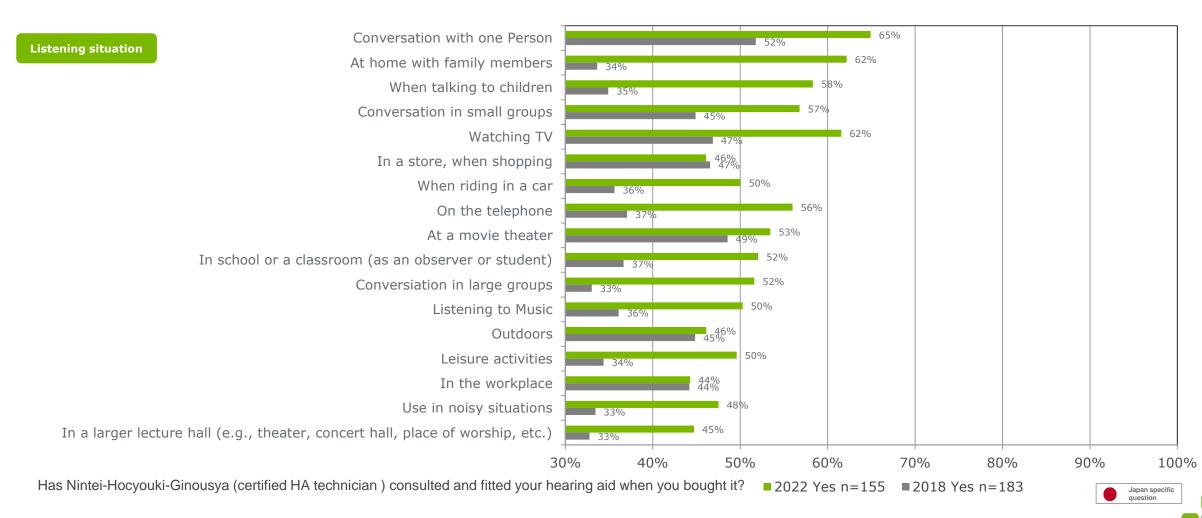








### Satisfaction trend 2018-2022 for those devices fitted by Nintei-Hocyouki-Ginousya (certified HA technician )









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

#### Influence on overall satisfaction with HA\*

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	_			-		_	_	

Sound quality signal processing

**Product features** 

0.53
0.50
0.49
0.49
0.81
0.79
0.79
0.71
0.66
0.63
0.60
0.52
0.48
0.42
0.35

Page 77



<sup>\*</sup>The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction, 1 means a maximal relationship.

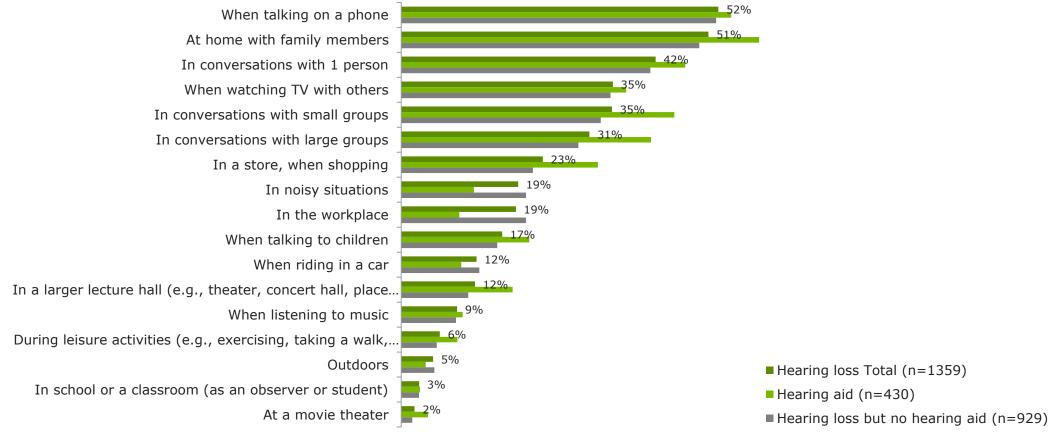






#### Important listening situations

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



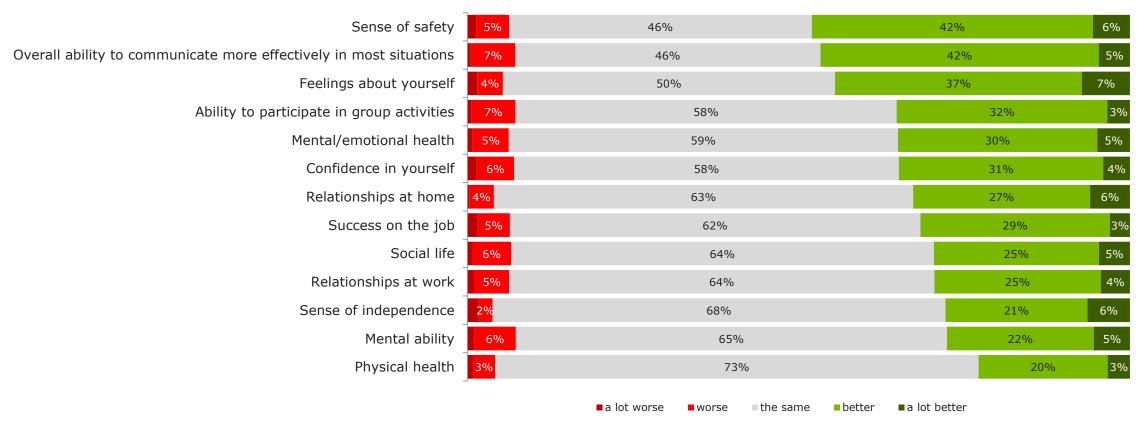






### Significant positive impact of HAs on different aspects: Especially "sense of safety", "ability to communicate more effectively" and "feelings about yourself" improved

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



HA-owner, n=430

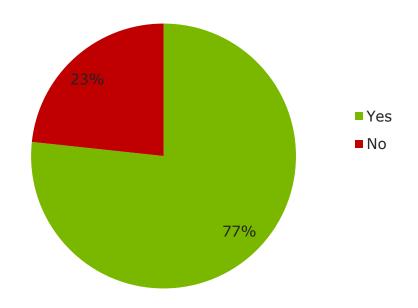






## 77% of the hearing aid owners feel more confident moving in a city since wearing hearing aids.

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



n=430



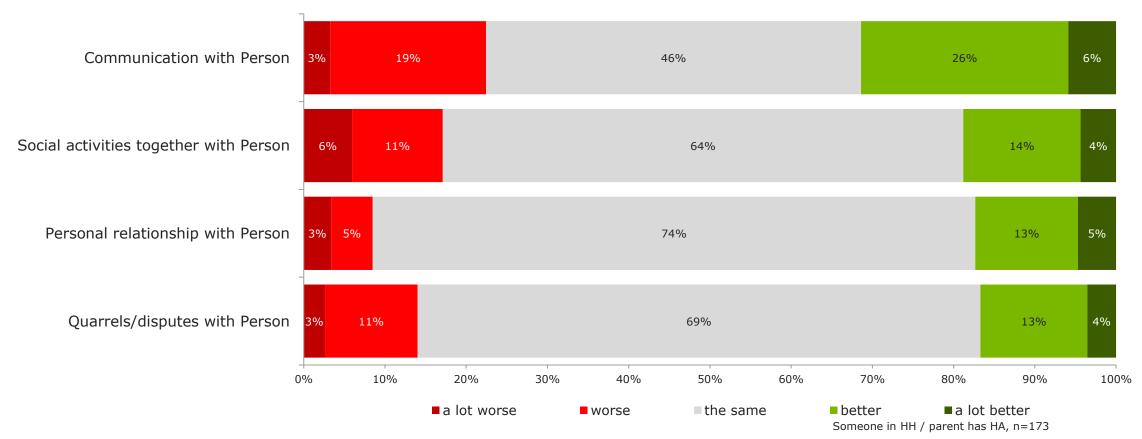






# Also for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids

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



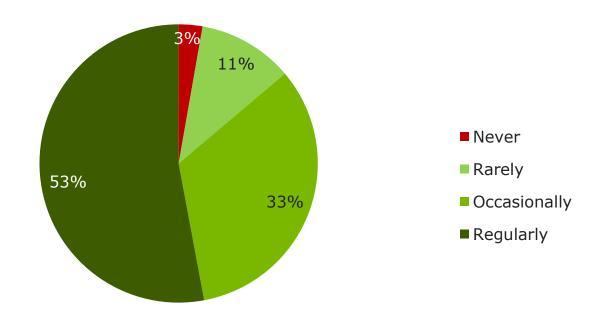






# 97% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

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



n=430









### 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 n=360	Non-owner Top 5	0% HL
Ears impaired (stated)					
Unilateral loss	28%		42%	30%	
Bilateral loss	72%		58%	70%	
Perceived loss			More similar hearing loss-structure		
Mild	27%	<b>—</b>	62%	22%	
Moderate	55%		36%	70%	
Severe	16%		2%	4%	
Profound	2%		0%	4%	

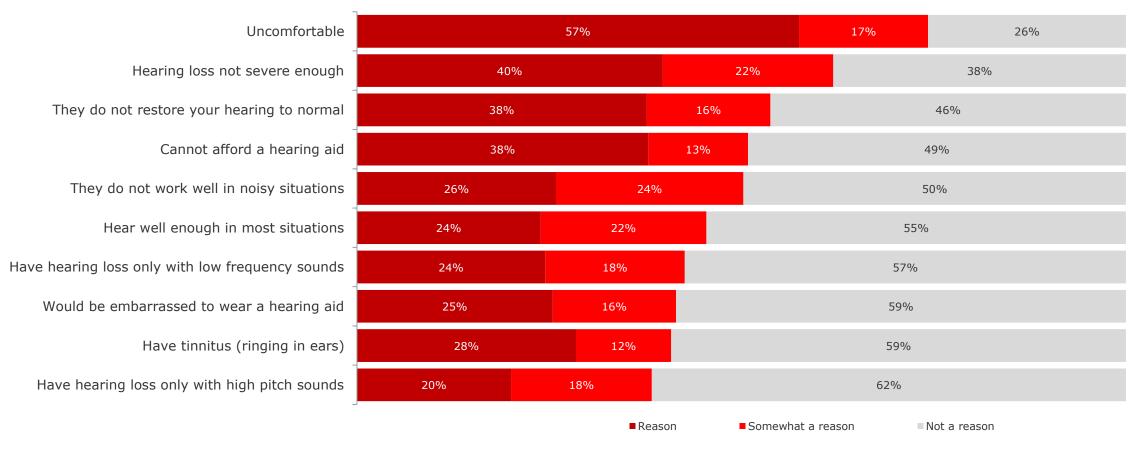
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#### Top 10 reasons for not having a hearing aid (I/II)



Base: non owners Top 50% HL: n=222

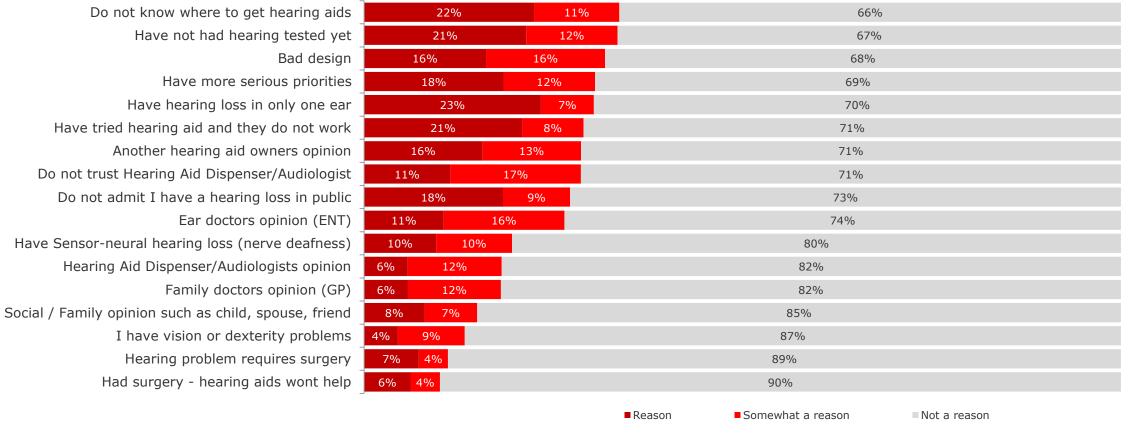
Page 86







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



Base: non owners Top 50% HL: n=222

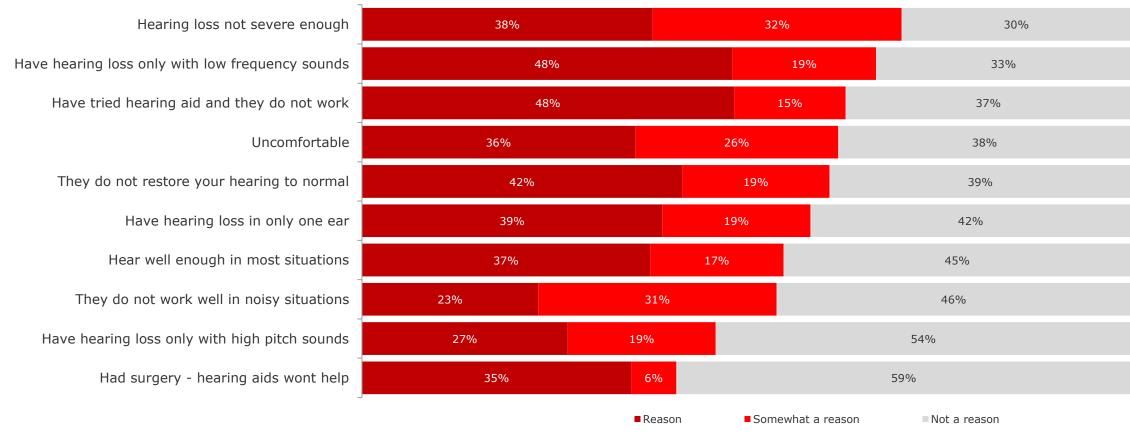








#### Top 10 reasons for HA owners NOT using them



Owners who don't use, n=44

Page 88







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





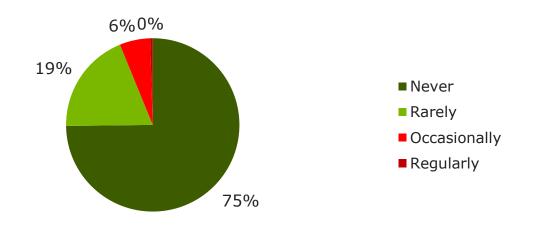




75% of hearing aid owners think people don't make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired person without hearing aids.

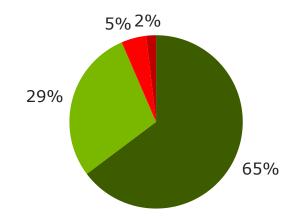
#### **Hearing aid owners:**

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



#### **Hearing impaired non-owners:**

How often do you feel you are made fun of or rejected because your hearing loss?



n=430

Base: Top 50% hearing loss, no hearing aid n=222



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### Most important triggers to buy





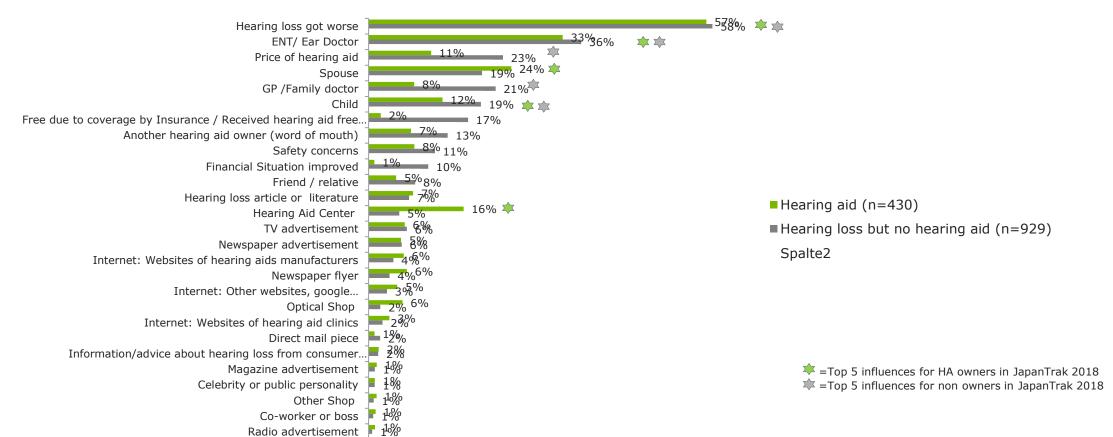




# The most important influencing factors are worsening hearing loss, ENT, and significant others (and: price for non owners)

**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 ?



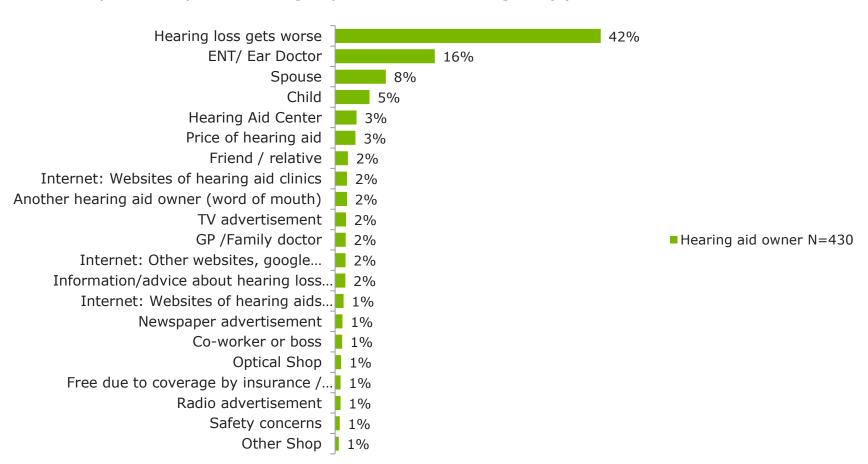






# The most important trigger to buy a hearing aid is worsening hearing loss, followed by ENT, Audiologist and spouse.

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



#### **Peter Heil**

Anovum GmbH Sumatrastrasse 25 CH-8006 Zürich

Telefon +41 (0)44 576 76 76 Mobil +41 (0)79 757 57 46 Email peter,heil@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

















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

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=Hearing impaired)	No hearing loss	Hearing loss but no hearing aids	Hearing aids
Gender						
Male	6'834	9.7%	12.3%	48.8%	48.6%	38.0%
Female	7'229	10.3%	17.8%	51.2%	51.4%	62.0%
Age recoded						
1 - 14	1'751	0.6%	16.4%	13.8%	0.7%	0.8%
15 - 24	1'312	1.8%	4.5%	10.2%	1.9%	0.5%
25 - 34	1'417	2.0%	18.2%	11.0%	1.9%	2.4%
35 - 44	1'719	2.6%	14.0%	13.2%	3.2%	2.9%
45 - 54	2'066	5.5%	7.6%	15.4%	8.9%	4.1%
55 - 64	1'717	8.9%	6.0%	12.4%	12.1%	4.3%
65 - 74	1'917	14.9%	8.5%	12.9%	21.9%	11.4%
74+	2'163	34.4%	21.1%	11.2%	49.3%	73.6%
Type of household						
single household	1'344	13.1%	19.9%	9.2%	11.9%	16.5%
Couple, no kids	2'972	13.6%	15.3%	20.3%	28.8%	28.9%
Couple with kid(s)	5'123	4.9%	9.2%	38.5%	19.0%	10.7%
Single mom/dad with kid(s)	2'569	11.0%	17.1%	18.0%	19.7%	22.7%
Couple with kid(s) and/or grandchildren	309	14.6%	18.3%	2.1%	3.1%	3.9%
Single grandfather/mother with kid(s) and /or grandchildren	256	12.0%	19.3%	1.8%	2.1%	2.8%
Retirement home, hospital etc.	178	42.7%	18.5%	0.8%	5.2%	6.6%
Other	1'312	10.6%	12.1%	9.3%	10.3%	7.9%



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\* Small sample sizes in some categories

Page 96







### Demographics (2) Hearing instrument adoption rates and populations

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=Hearing impaired)	No hearing loss	Hearing loss but no hearing aids	Hearing aids
Status The board of the board of the board of	51544	45.40/	4.4.007	07.00/	50.40/	50.40/
The head of the household	5'511	15.1%	14.9%	37.0%	59.4%	58.1%
The spouse of the head of the household	3'391	9.3%	13.9%	24.3%	22.7%	20.4%
Daughter/son of head of household	4'120	1.2%	12.2%	32.1%	3.7%	2.8%
Parent of the head of the household	604	28.8%	19.0%	3.4%	11.8%	15.5%
Other person Employment	437	7.8%	19.3%	3.2%	2.3%	3.1%
Full time employed	4'580	5.6%	6.6%	39.9%	20.2%	8.0%
Part time employed	1'859	6.8%	12.1%	16.0%	9.4%	7.2%
Unemployed / not working	2'291	11.4%	20.4%	18.7%	17.6%	25.3%
Retired under a disability pension scheme (fully or partly)	2'033	28.3%	17.9%	13.5%	39.9%	48.5%
Early retired under an early retirement benefit scheme	72	20.6%	20.0%	0.5%	1.0%	1.4%
Retired (at the official retirement age)	579	25.2%	13.2%	4.0%	10.7%	9.1%
Student / pupil / in training	821	1.7%	7.7%	7.4%	1.1%	0.5%
Education						
a middle school	967	21.8%	17.2%	7.0%	14.7%	17.1%
a high school	4'030	13.0%	13.5%	32.3%	38.4%	33.6%
a vocational ( technical ) school	1'103	7.8%	16.9%	9.4%	6.0%	6.9%
a junior college	930	9.6%	24.9%	7.8%	5.7%	10.5%
a university	3'800	9.0%	13.7%	31.9%	25.1%	22.3%
a graduate school	363	7.7%	5.5%	3.1%	2.3%	0.7%
Other	176	22.0%	26.5%	1.3%	2.4%	4.8%
Prefer not to say	866	8.4%	11.8%	7.3%	5.4%	4.1%



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#### 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		
1′000	+- 3.1	+- 2.2		
5′000	+- 1.4	+- 1.0		
10′000	+- 1.0	+- 0.7		

