

Results

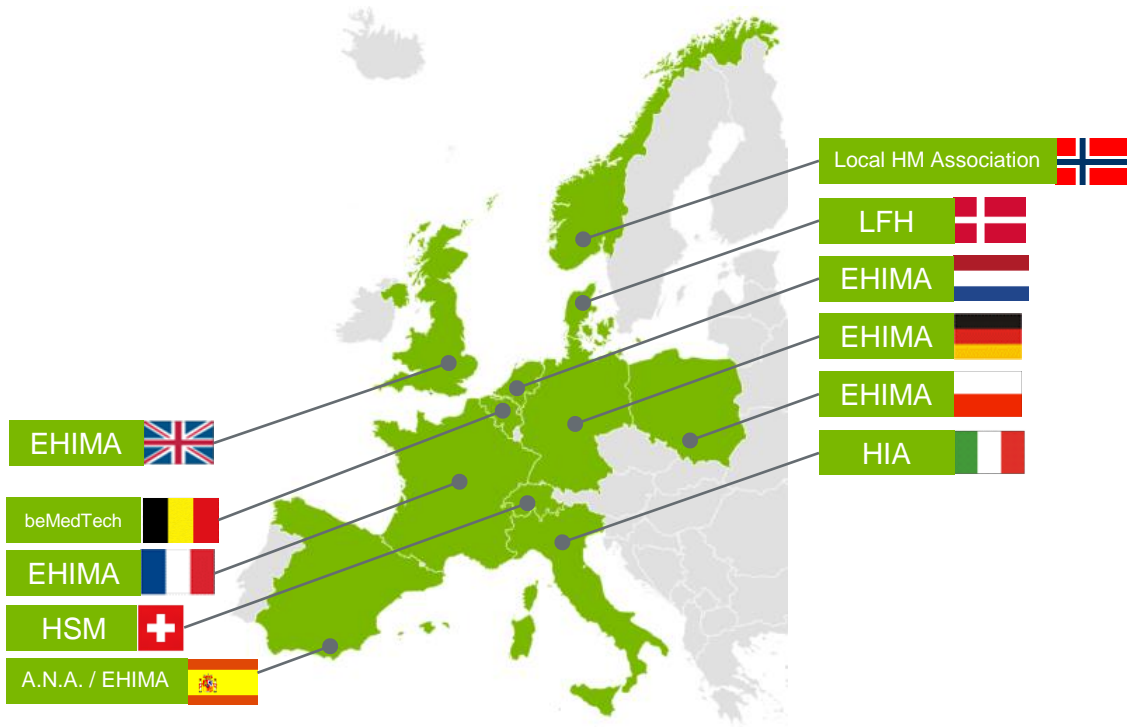
ChinaTrak CHN 2023

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

Summary

1. Introduction

ChinaTrak CHN 2023 is part of the EuroTrak / APACTrak studies:



ChinaTrak CHN 2023 was designed and executed by Anovum (Zurich) on behalf of EHIMA

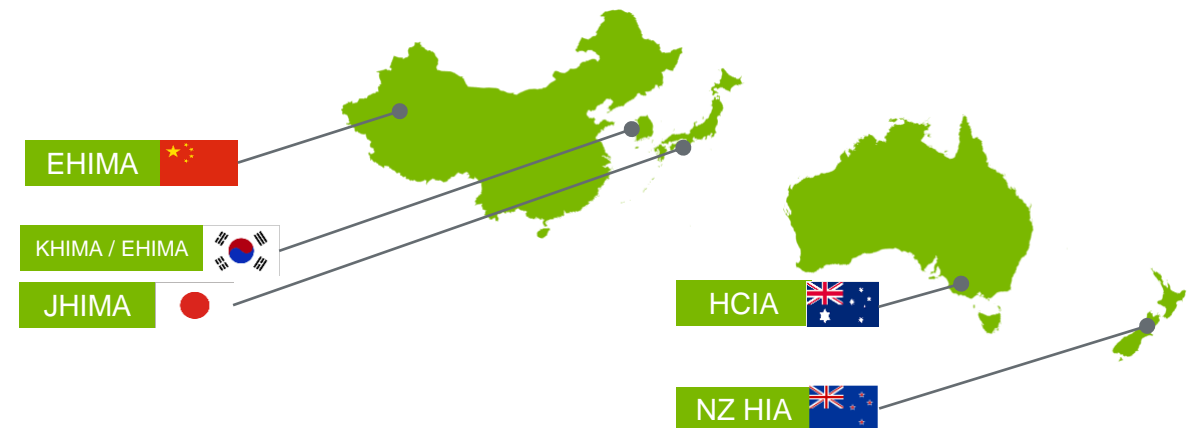
Sample sizes:

Representative sample (sample 1): n=13'266 people

Hearing impaired (sample 2): n=848 people

Hearing impaired non-owners (HA Non-owner): n=392 people

Hearing aid owner (HA Owner): n=456 people



Summary

2. Market overview

- **Stated hearing loss prevalence**

- Total: 4.2%, 18+: 5.2% (2020: 5.8 18+: 7.2%).
- Hearing Tests: 14% had a hearing test in the last five years (2020: 18%). Hospitals do most tests followed by hearing screening during community social activities.

- **Hearing aid adoption rate (HA penetration)**

- 9.3% of those with self-declared HL (2020: 10.3%).
- 0.4% of total population (2020: 0.6%).
- 15% of HA owners have binaural treatment (2020: 35%).

- **The route to the hearing aid**

- 31% of the hearing impaired discussed hearing loss with an ENT in a hospital.
- 27% got hearing aids recommended from the ENT /hospital (dropout rate=14% / 2020: 36%).
- 70% of the ENT/hospital consultations recommended hearing aids (2020: 54%), 20% referred to an HA dispenser / Audiologist, and 14% recommended no action. (→More recommendations but not more action compared to 2020)

- **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.

Summary

3. Analysis of hearing aid owners

- **Hearing aid ownership, usage, and accessories**
 - Almost no hearing aid owners received hearing aids as a give away, also awareness among non-owners for those giveaways is very low
 - 66% of owned HAs were bought in 2021 - 2023.
 - The average age of the currently owned HAs is 2.7 years.
 - The median age of hearing aids before replacement is 3 years.
 - On average, HAs are worn 6.7 hours a day.
 - 43% of today's hearing aid owners are aware of their hearing aid brand.
 - BTE is the most often purchased type of HA, followed by RIC.
 - Cochlear Implants: 24% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
 - 16% of the HA owners use a hearing aid app, and 81% are satisfied with it.
 - 8% of the HAs are (to the knowledge of the owners) equipped with Telecoil — the primary usage of Telecoil is the phone

- **Importance of listening situations and satisfaction with HAs**
 - 97% (2020: 95%) of hearing aid owners say their hearing aid works better than or as expected
 - 95% of hearing aid owners are satisfied with their hearing aid(s) (2020: 92%).
 - Talking on the phone, with family members at home, and children are the most critical listening situations.

- **Positive impact of Hearing aids**
 - Significant positive impact of hearing aids on different aspects: Self-confidence, sense of safety, social life, and many others improved.
 - 98% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
 - 92% 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**

- The main reasons for not using hearing aids are that they think their hearing loss is not severe enough, hearing aids are uncomfortable, hearing aids do not restore hearing to normal, have other priorities and another hearing aid owner's opinion.
- 1% who own hearing aids don't use them (0 hours); 4% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**

- 39% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. Somebody is more likely to make fun of or deny a hearing impaired without hearing aids
- The most important influencing factors for HA owners were worsening hearing loss, price, gatekeepers (as hospital/ENT and Audiologist), and significant others (as spouse, child, relatives)

Detailed Results: Roadmap

1. Introduction

- Organisation of ChinaTrak CHN 2023
- 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 ChinaTrak CHN 2023

Organisation

- Principal of the project ChinaTrak CHN 2023 is EHIMA.
- Anovum Zurich developed the concept of ChinaTrak CHN, designed the questionnaire and conducted the fieldwork in cooperation with a local company. Furthermore, Anovum analyzed 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 CHN/2023/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. 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=13'266** 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 impaired: due to the low HA adoption in China, a targeted F2F recruitment approach, with recruiters looking for hearing impaired 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=456** hearing aid owners and **N=392** hearing impaired non-owners



Selected Tier 1-3 cities

Tier	City
Tier 1	Beijing
	Shanghai
	Guangzhou
Tier 2	Hangzhou
	Nanjing
	Chengdu
	Zhengzhou
	Taiyuan
	Nanning
Tier 3	Mianyang
	Guiyang
	Jilin
	Baoding
	Lanzhou

Note:

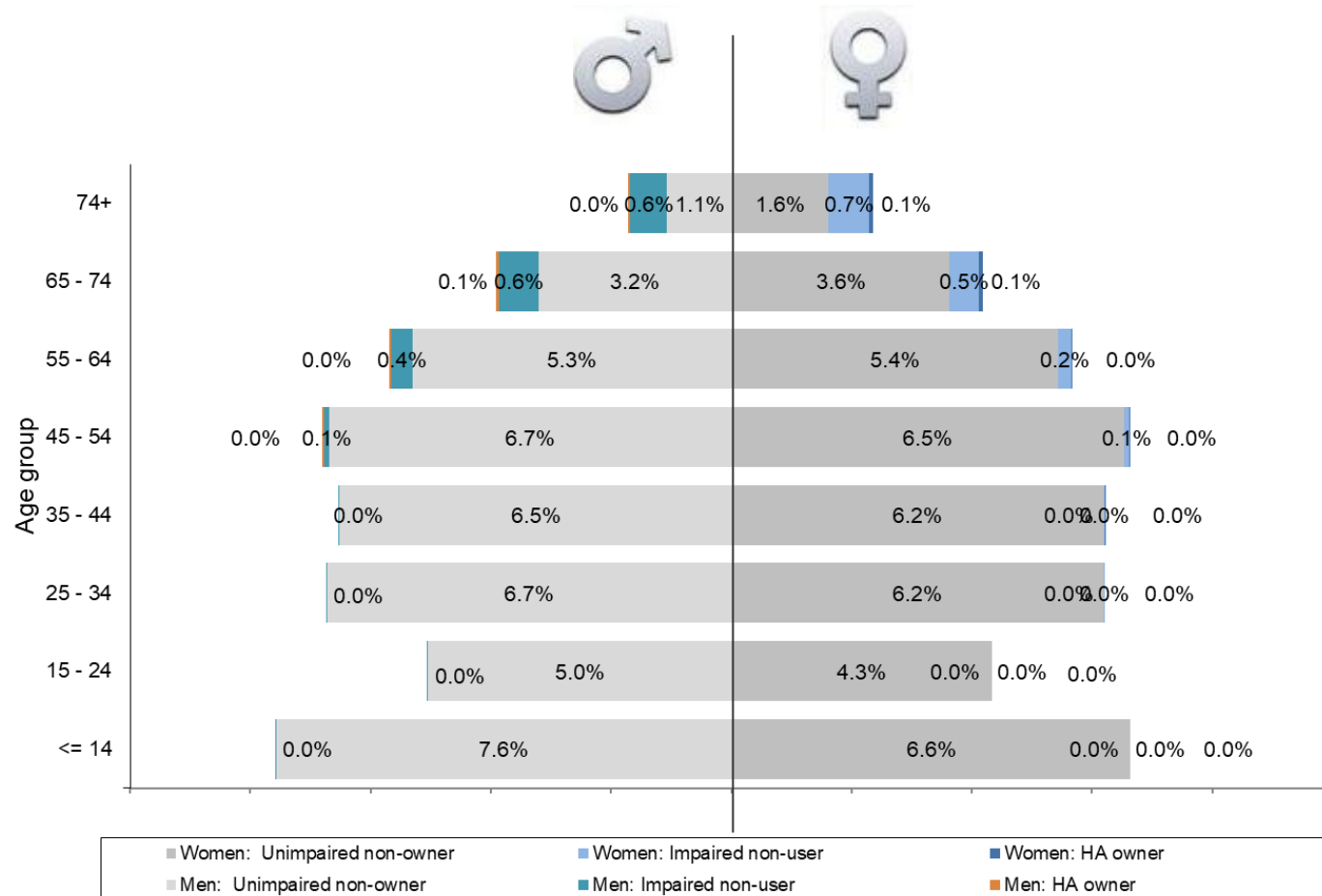
- Compared to 2023, recruiting people that agreed to the more extended F2F interviews was significantly more complex than in 2020.
- The Pandemic experience potentially caused this: China had relatively high COVID-19 infection-rates at the beginning of 2023, but the society was suddenly fully open again.



2. Market overview

Prevalence of hearing loss and adoption rate

Hearing loss and hearing instrument ownership by gender/age

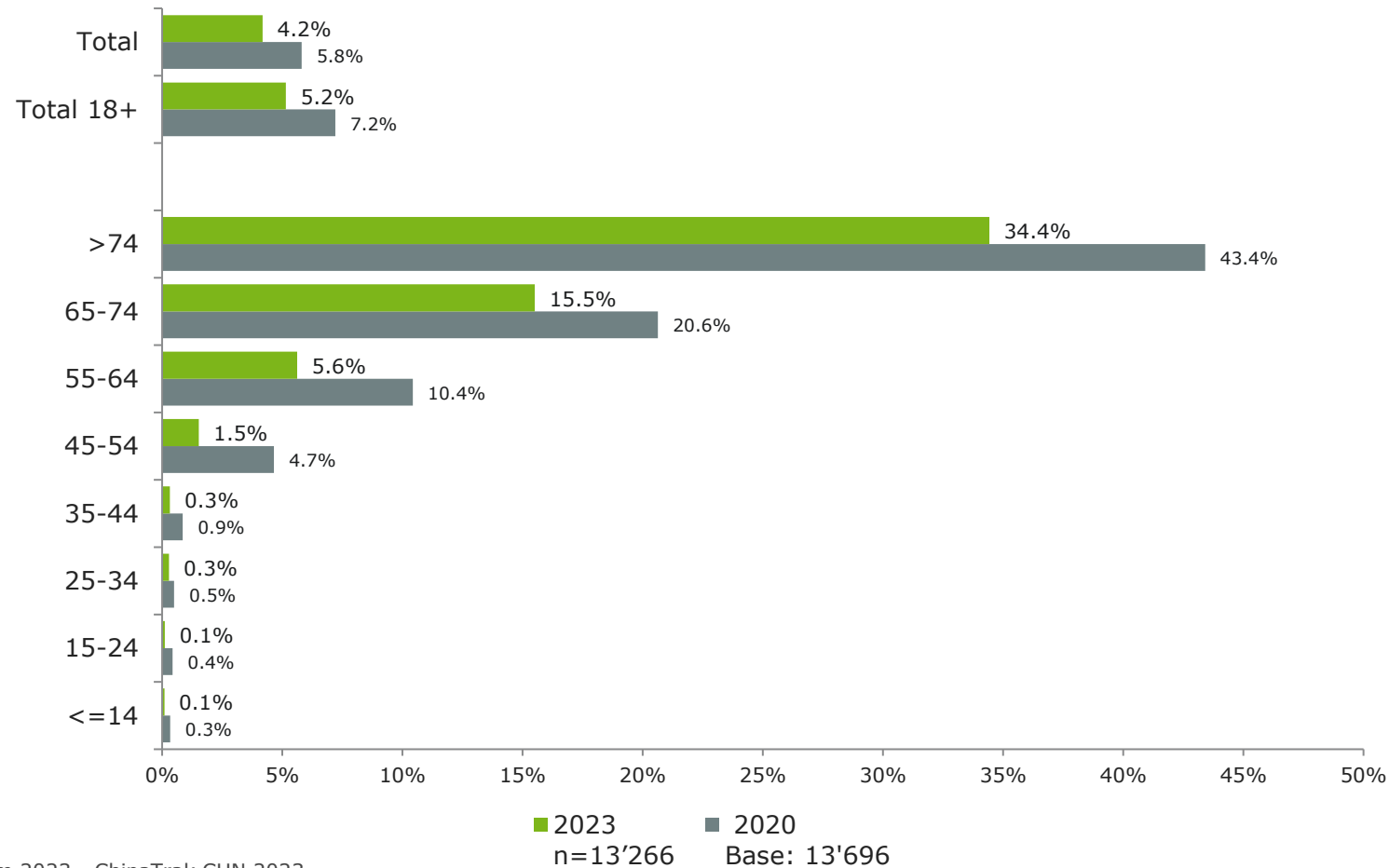


n=13'266

Hearing loss prevalence CHN

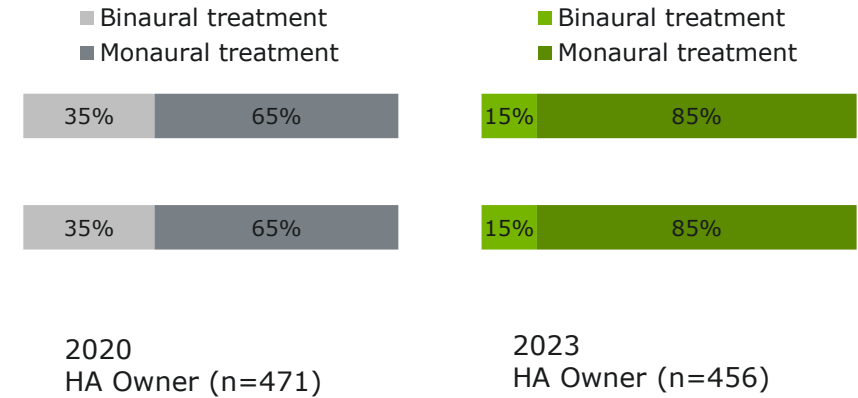
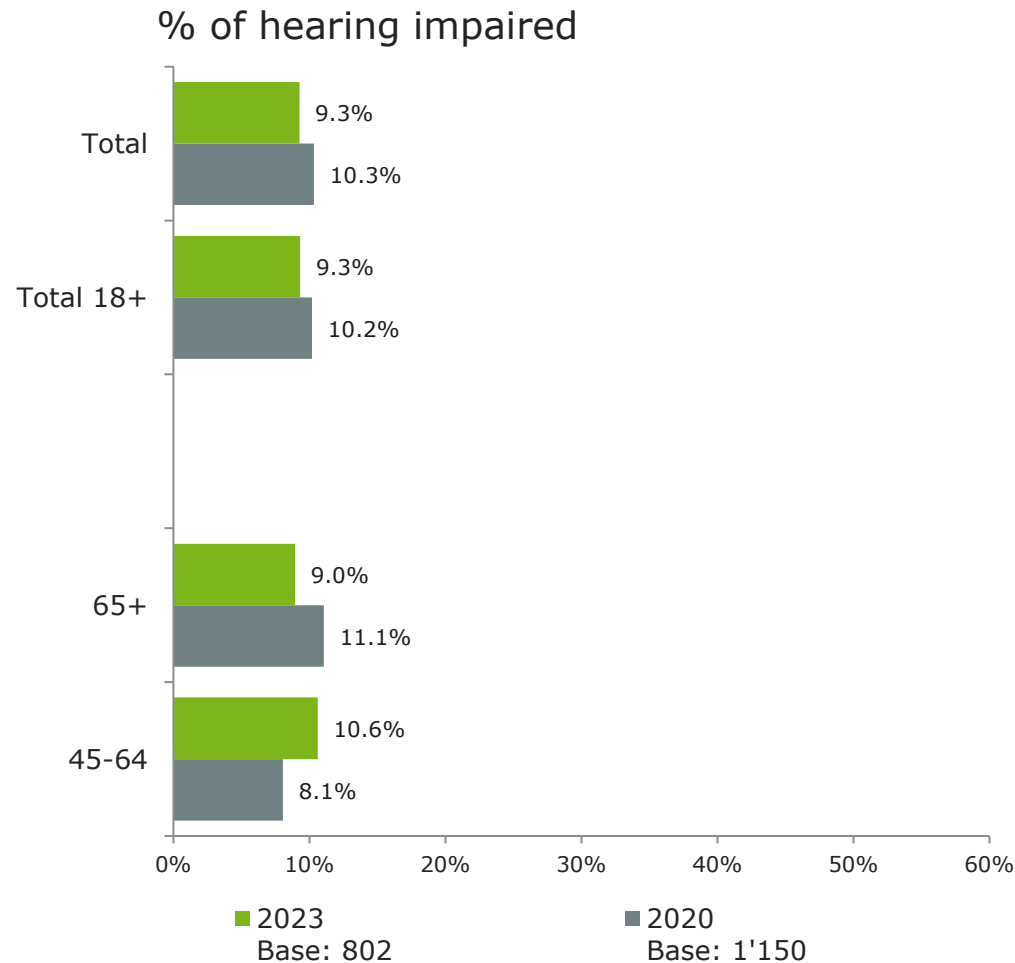
Self declared hearing loss

% hearing loss prevalence





Hearing aid adoption rate: 39% of the hearing impaired have hearing aid(s), and 55% of them have binaural treatment



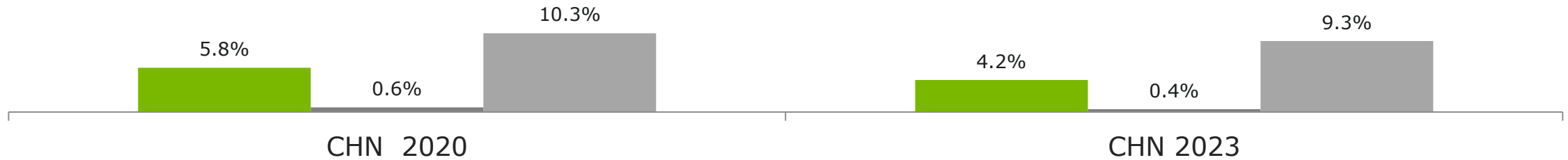
Combined data analysis by year of purchase:

	CHN Trak 2020 data			CHN Trak 2023 data	
	2016 or earlier	2018/2017	2020/2019	2020/2021	2022/2023
Unweighted Sample Size	103	198	168	270	131
Yes, for both ears	52%	35%	24%	20%	7%





Overview hearing loss prevalence and hearing aid adoption

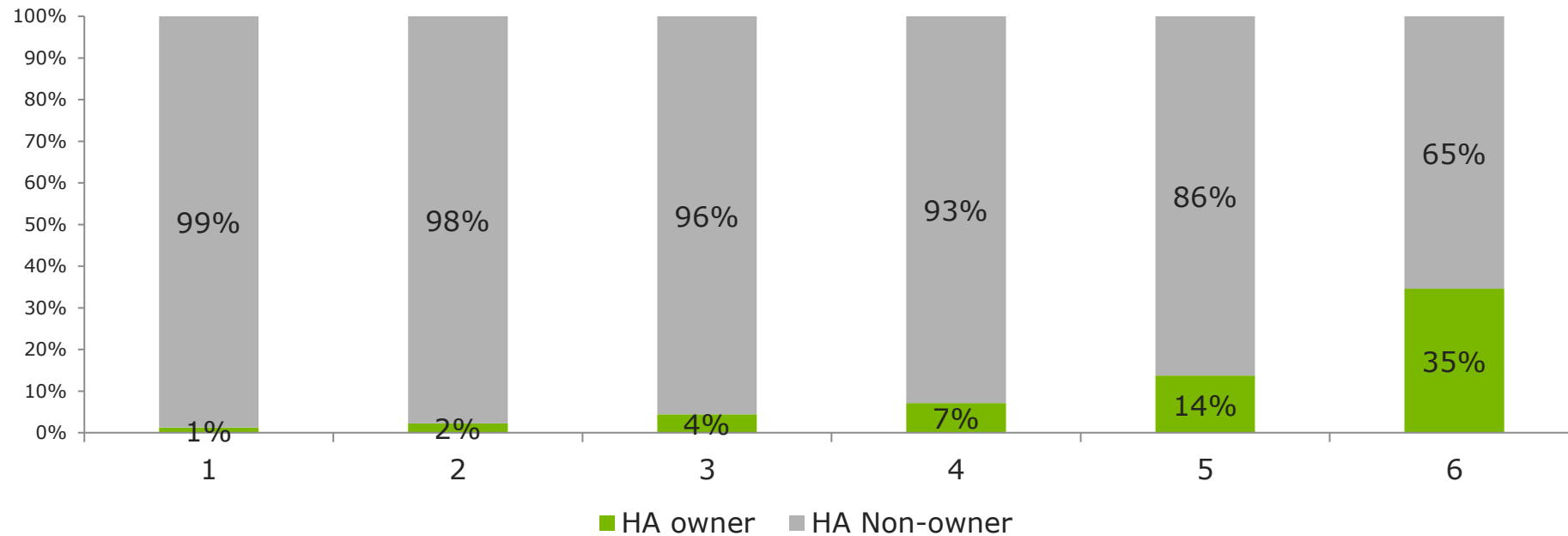


■ Hearing impaired (self-stated) ■ HA Adoption rate (people with hearing aids in % of population) ■ HA Adoption rate (people with hearing aids in % of hearing impaired)





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).

HA Owner n=456
HA Non-owner n=392



Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	HA Non-owner n=392	HA Owner n=456	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	63%	65%	11%
Bilateral loss	37%	35%	10%
Perceived loss			
Mild	58%	12%	2%
Moderate	31%	46%	13%
Severe	9%	38%	29%*
Profound	2%	5%	

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



Hearing tests and where hearing is tested

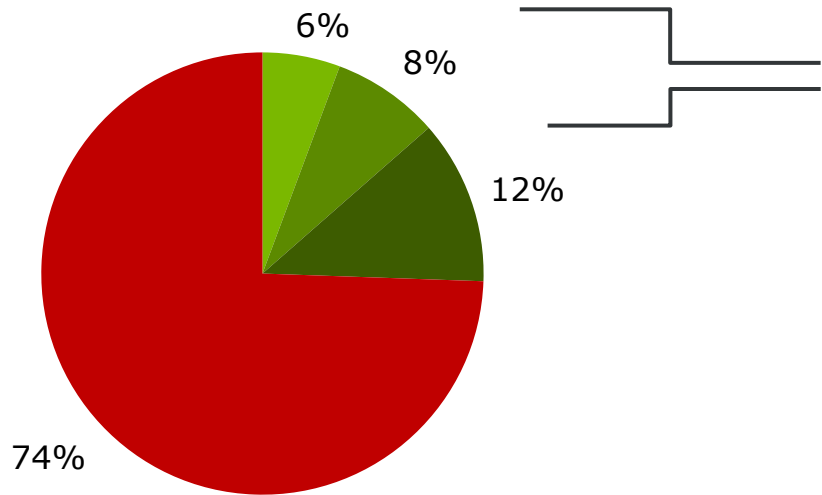




Hearing Tests: 14% had a hearing test in the last five years (2020: 18%). Hospitals do most tests followed by hearing screening during community social activities

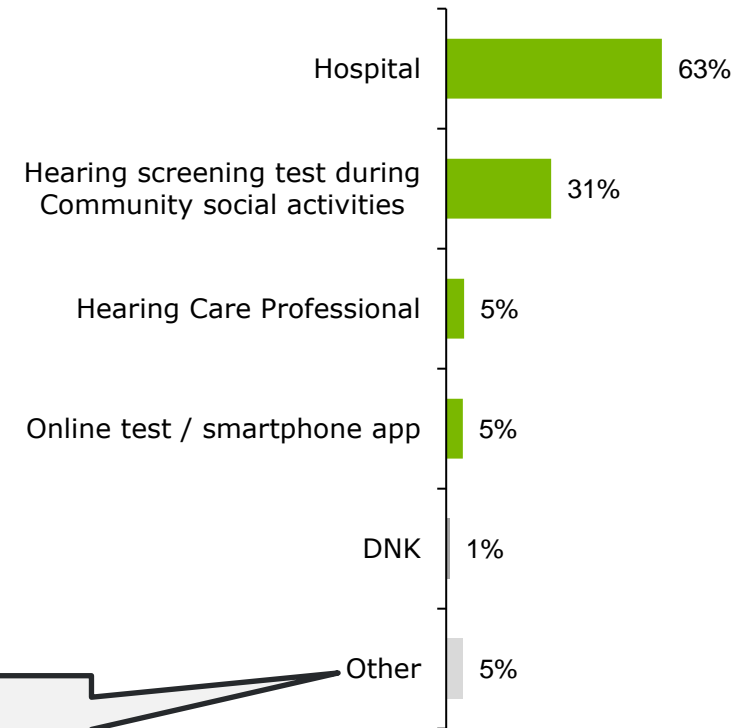
Have you ever taken a hearing test?

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



n=10'922

Where/how was your hearing tested?



n=1'551

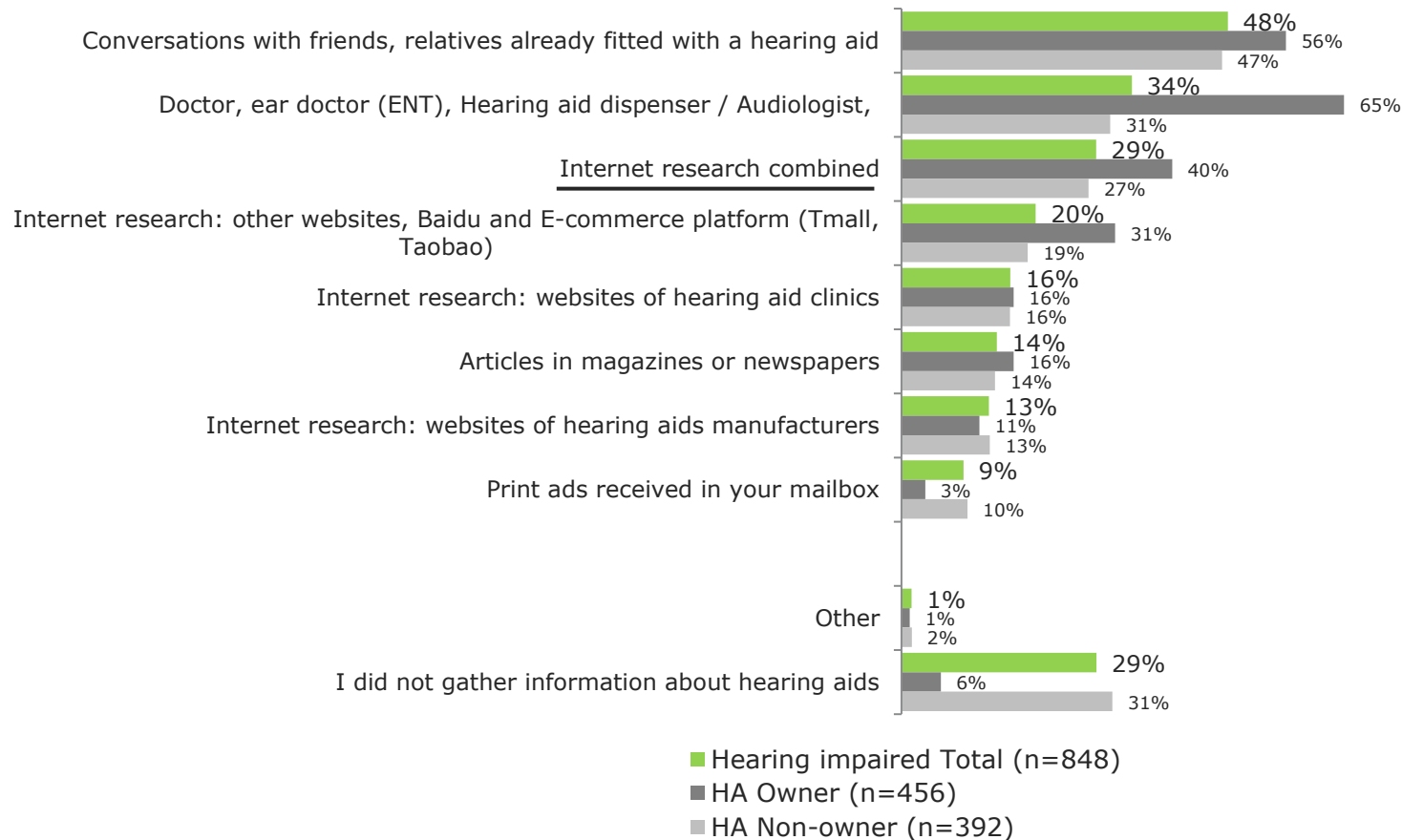
Mostly:
Physical examination
/School



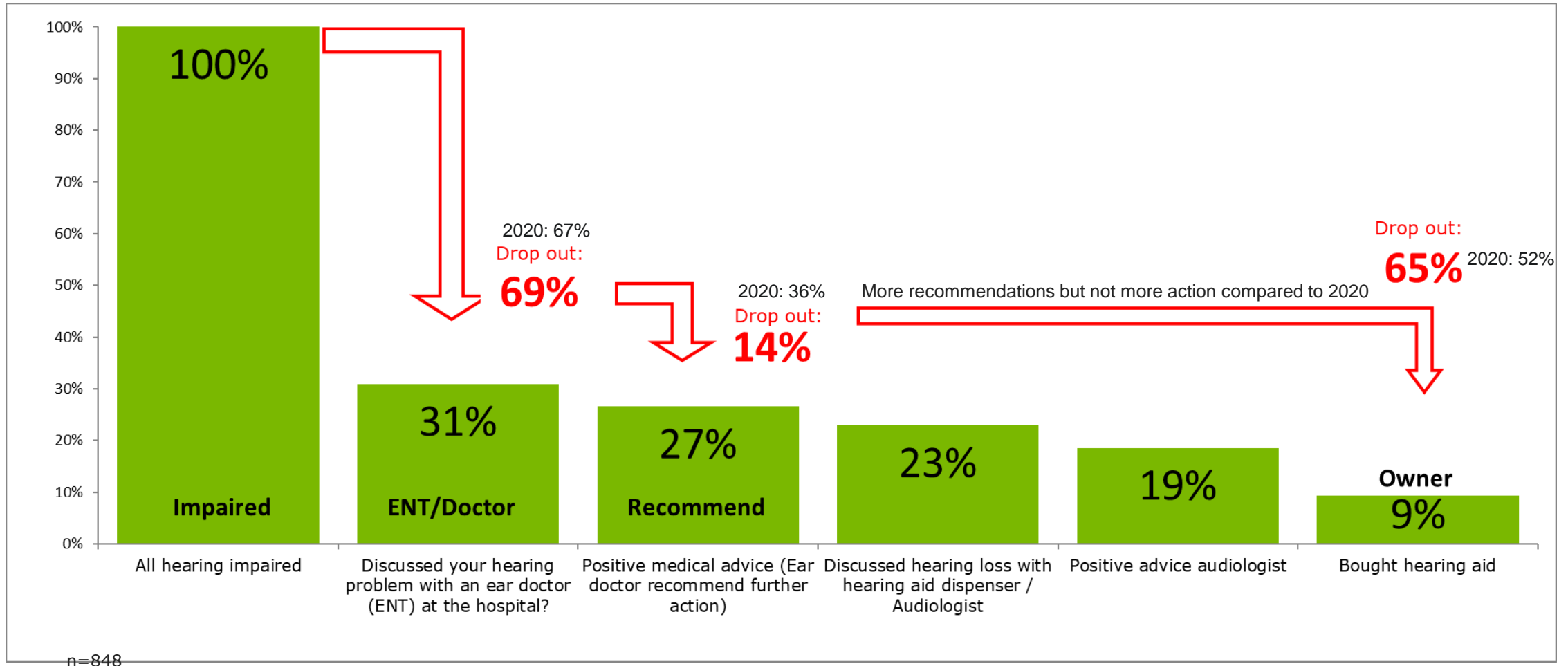
The route to the hearing aid: Sources of information and drop-out rates

ENTs/HCPs are important sources of information and therefore the major gatekeepers - conversations with friends got most important

Where did you gather information about hearing aids?

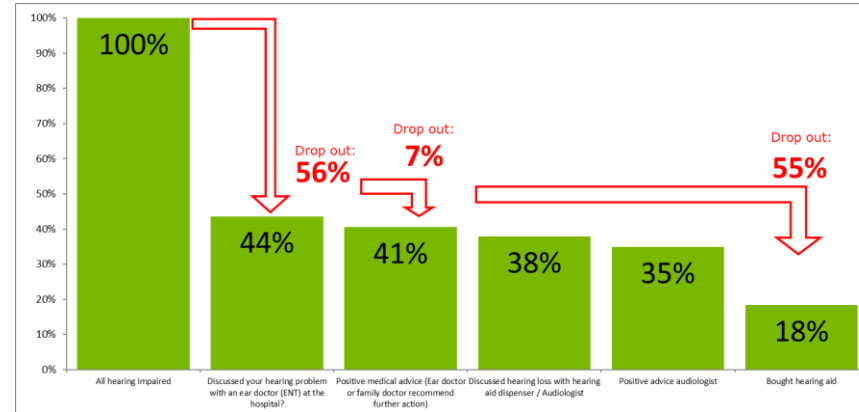


The route to the hearing aid

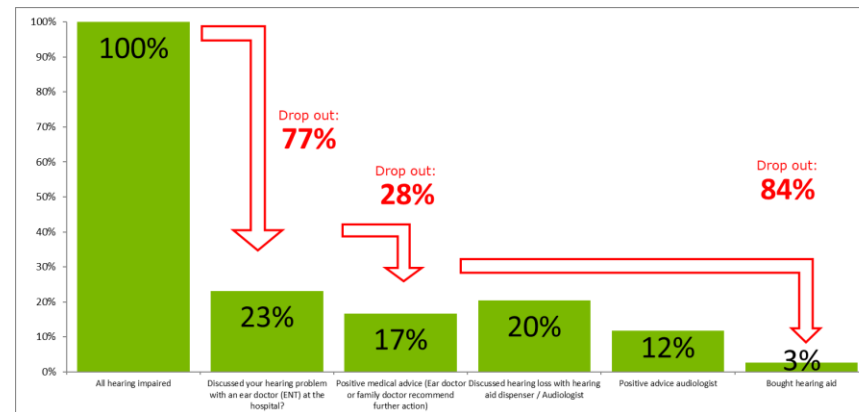


Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*



Low 50% hearing loss*



n=848

* 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).

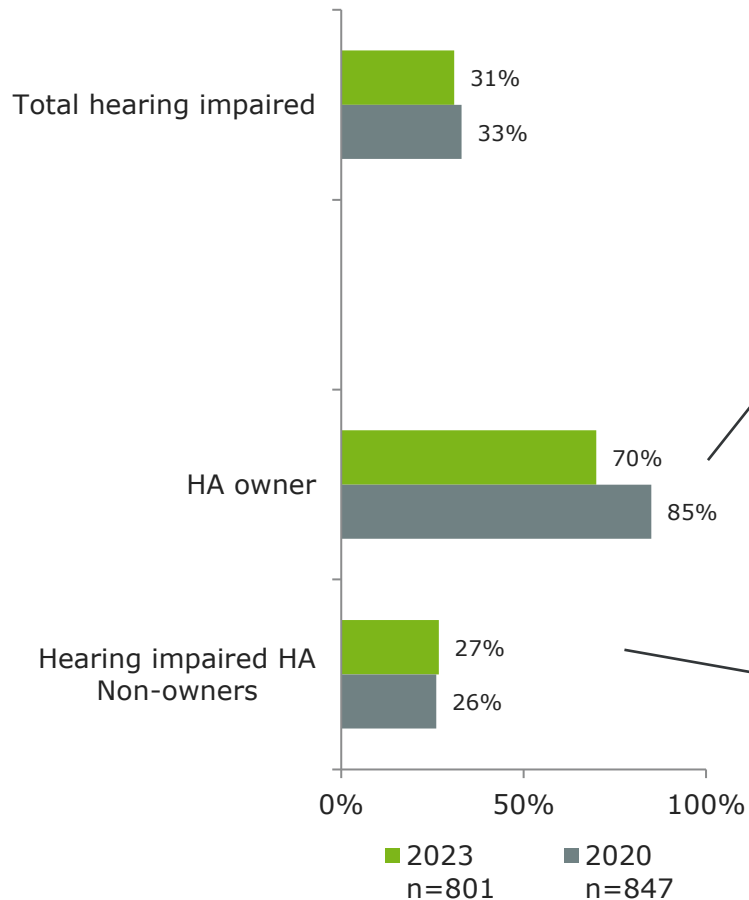




The route to the hearing aid: ENT

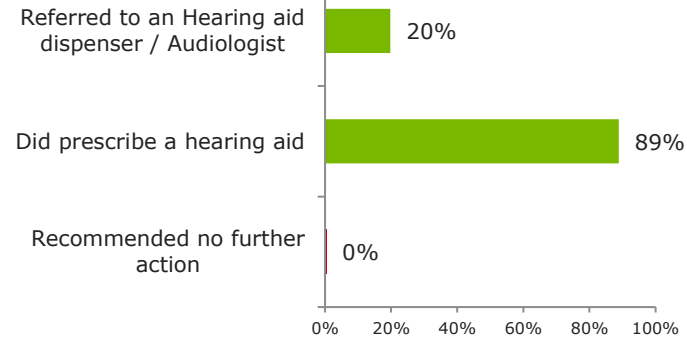
Have you ever discussed your hearing problem with an ear doctor (ENT) in a hospital?

% Discussed with ENT in hospital

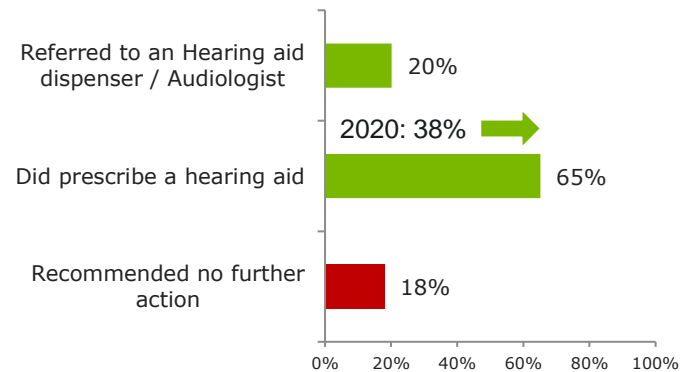


What did he/she recommend ?

HA Owner (n=347)



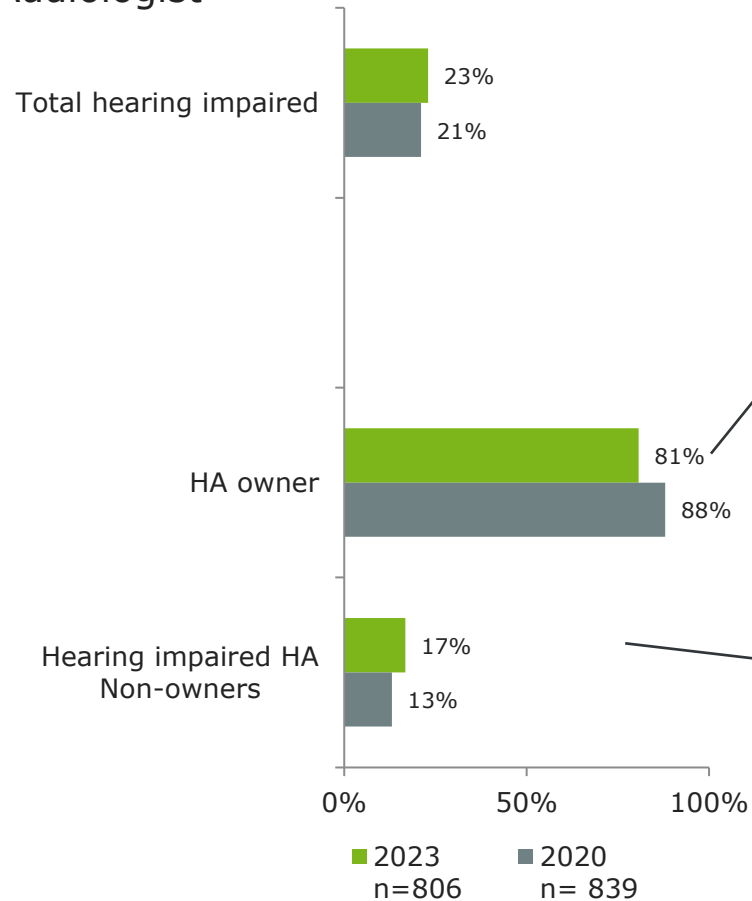
Impaired HA Non-owner (n=106)



The route to the hearing aid: audiologist

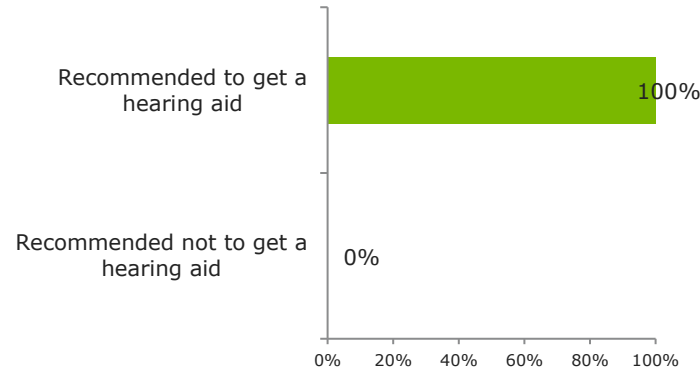
Have you ever discussed your hearing problem with an audiologist?

% Discussed with HA dispenser/
Audiologist

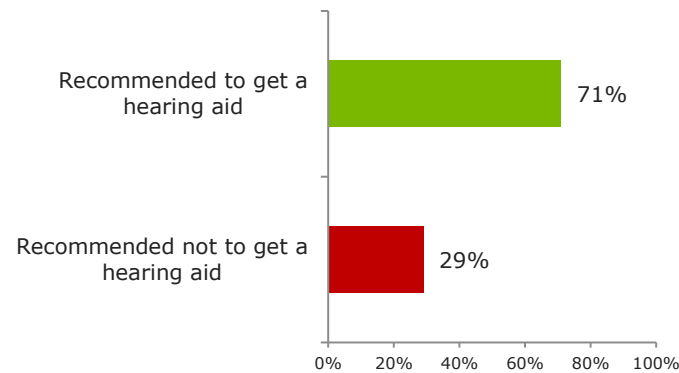


What did he/she recommend ?

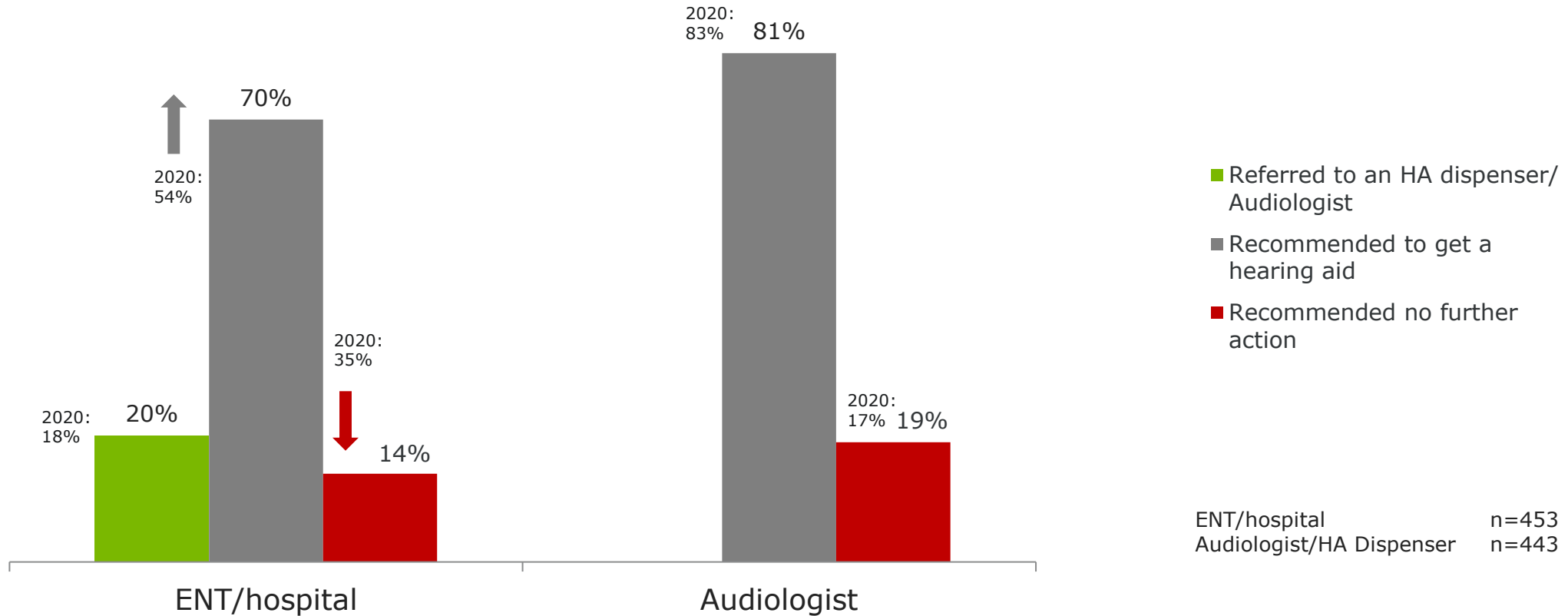
HA Owner (n=370)



Impaired HA Non-owner (n=73)



Recommendations by profession



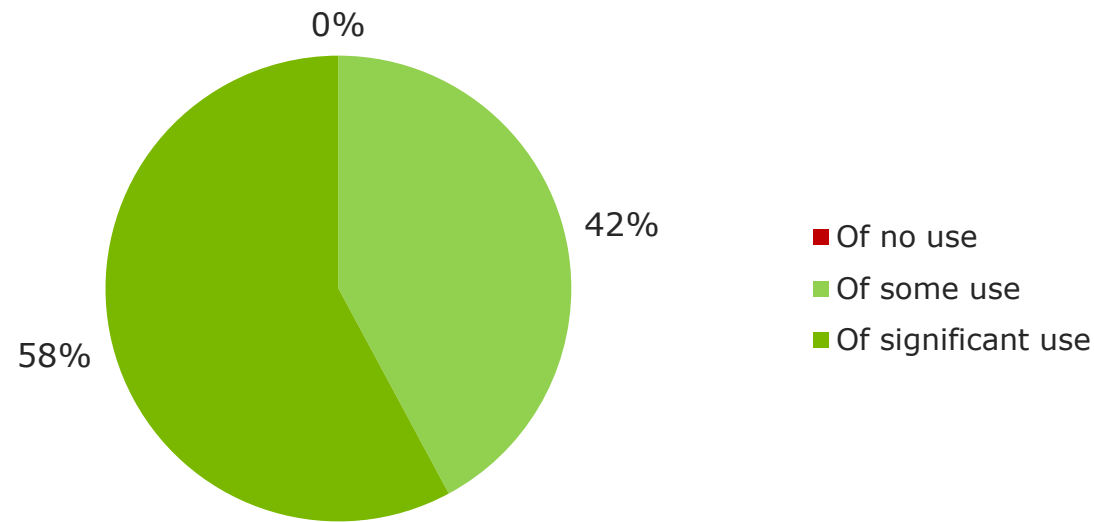
Sums can add to more than 100% (multiple responses)



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

Work competitiveness: 100% of the working hearing aid owners state that their hearing aid(s) are useful on their job

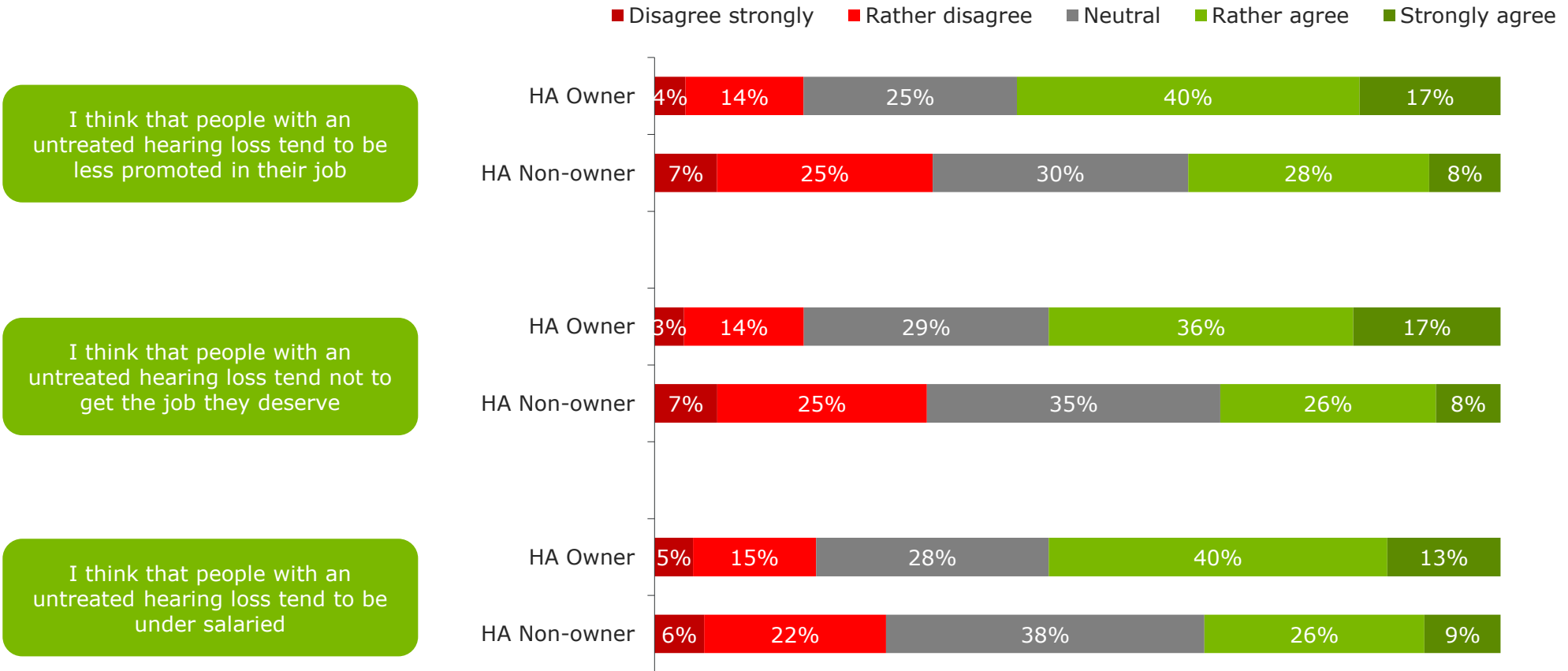
How useful are your hearing aids on your job?



Working HA Owner n=90



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



HA Owner n=426 / HA Non-owner n=353





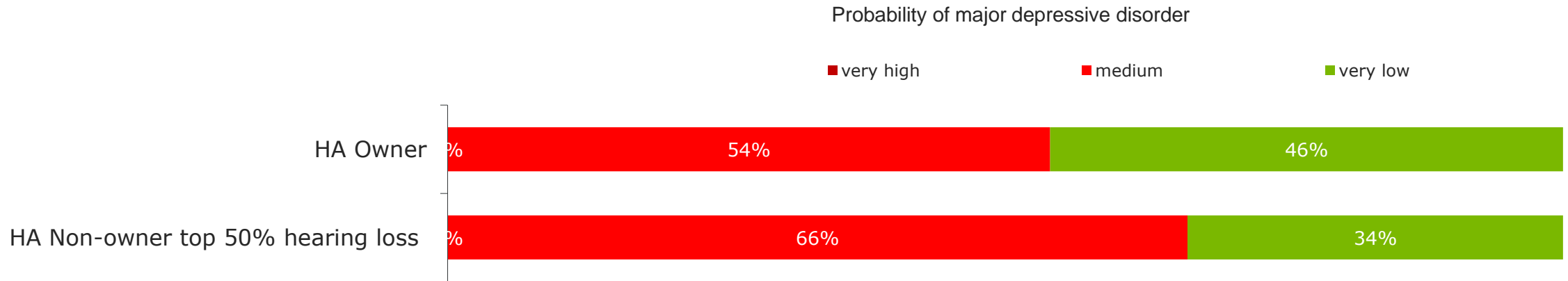
General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*)

Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

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



HA owner n=383 / HA Non-owner top 50% hearing loss n=86

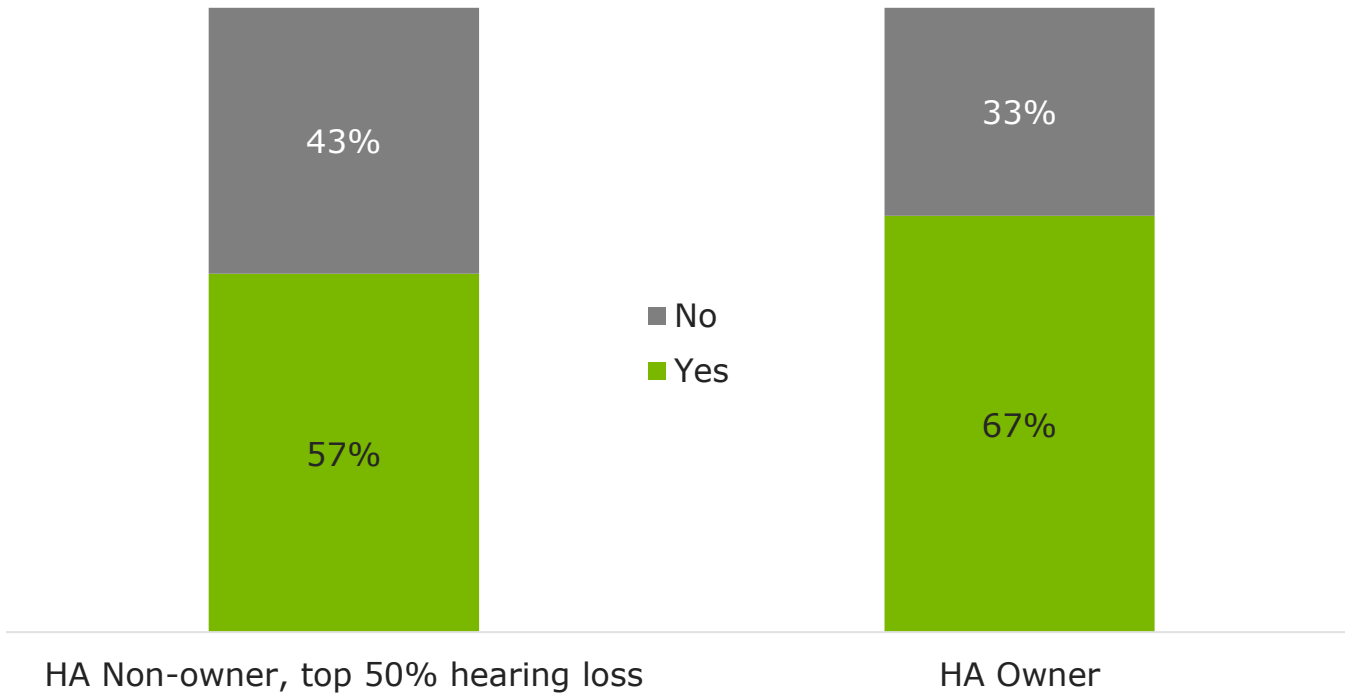
*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- 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

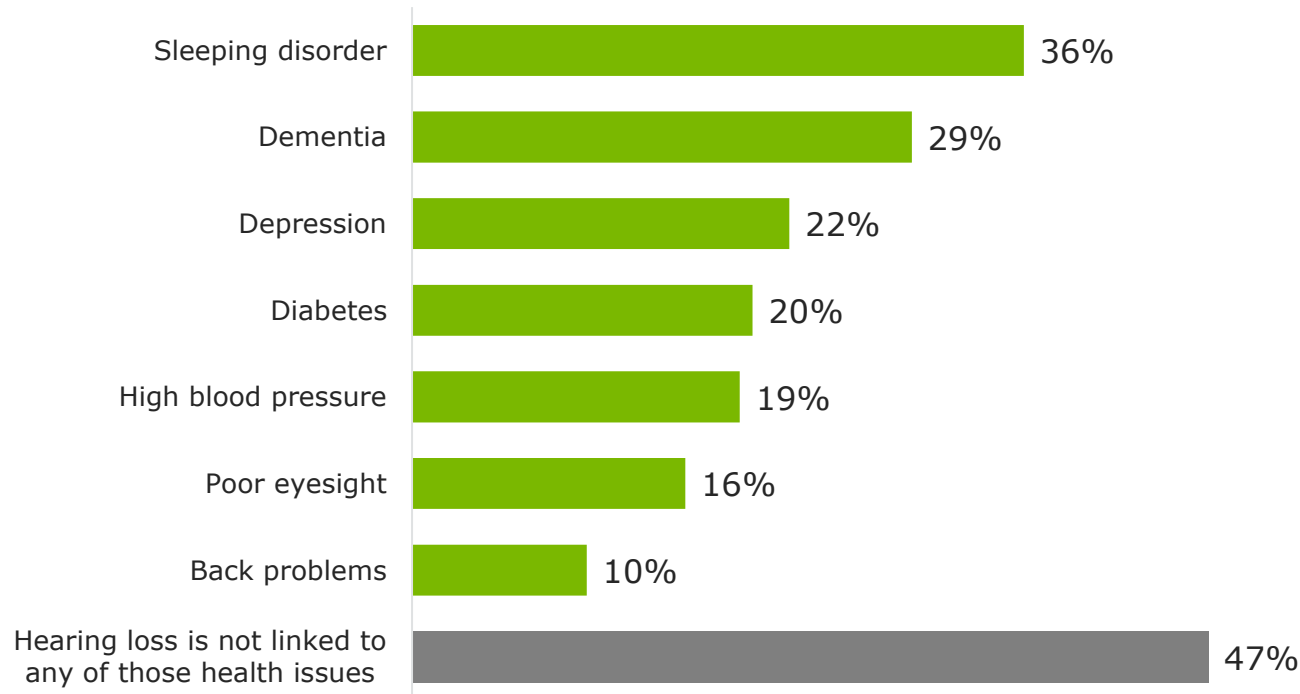
Are you generally satisfied with the quality of your sleep?



HA Non-owner top 50% hearing loss n=66 / HA Owner n=383

32% of all hearing-impaired think that hearing loss could be linked to depression

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



Hearing impaired, n=848



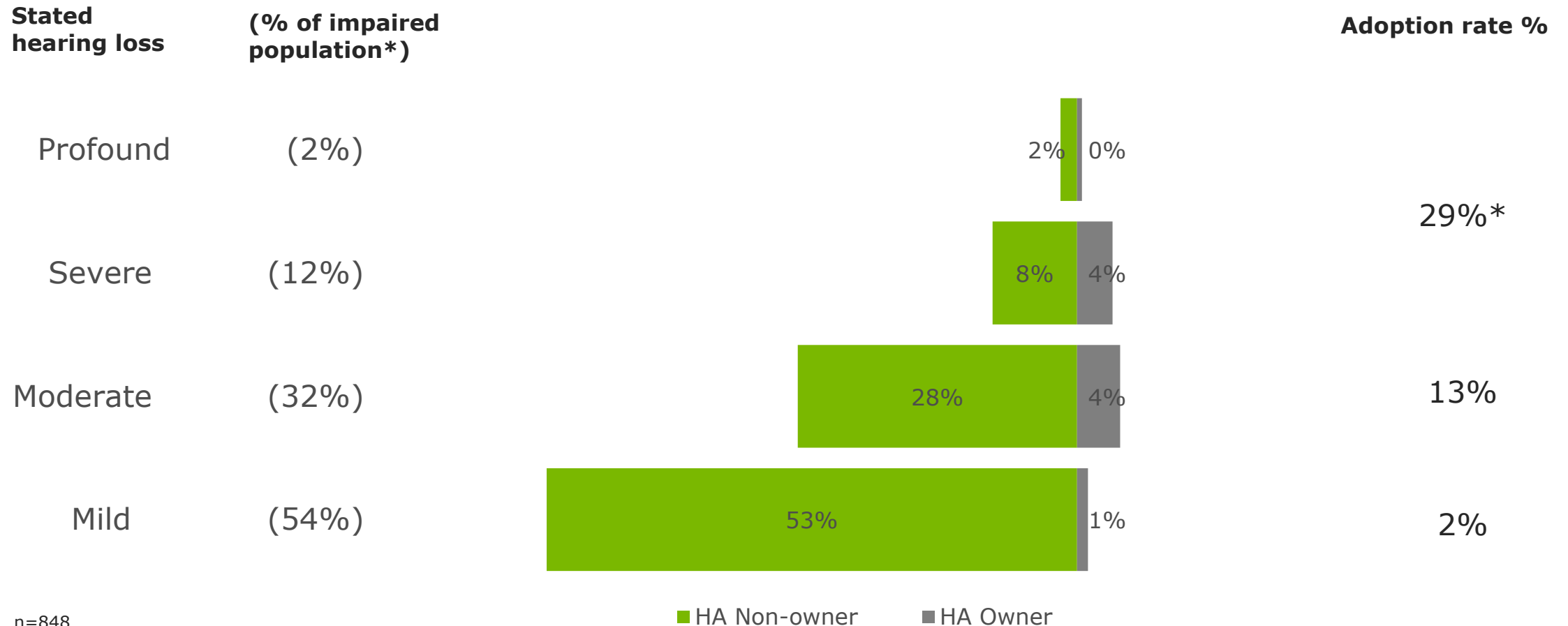
3. Analysis of hearing aid owners



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



Low adoption rates within mild hearing loss



n=848

Sums can differ from 100% due to rounding

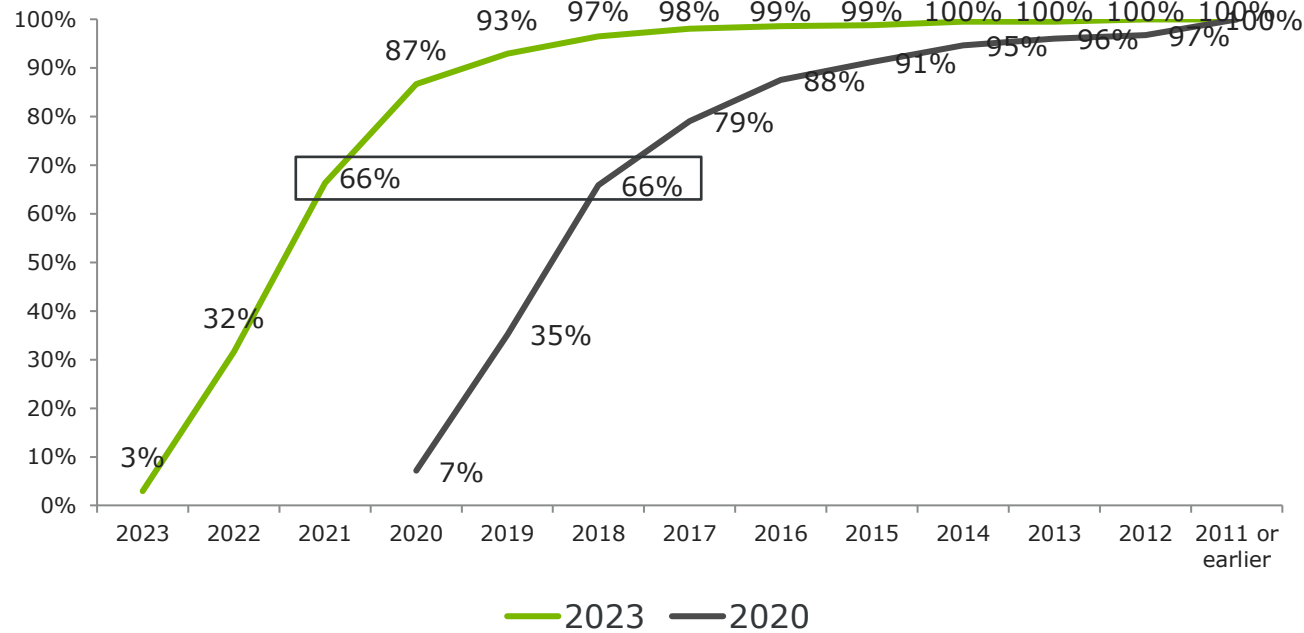
* combined "severe" and "profound" because n is too small





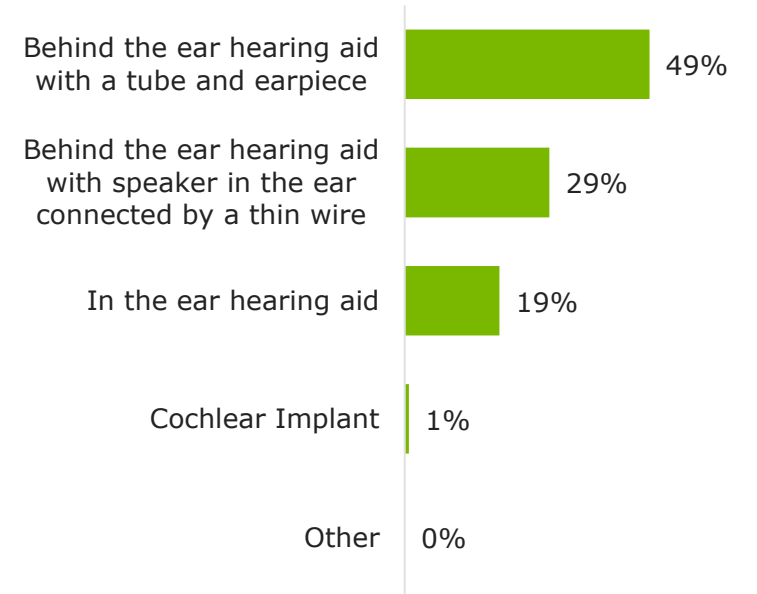
66% of the currently owned HAs were acquired in 2021 or later BTE is the most often purchased type of HA – followed by RIC

Year of purchase



Age of currently owned HAs (Mean):
2023: 2.7 years
2020: 3.0 years

Type of HA



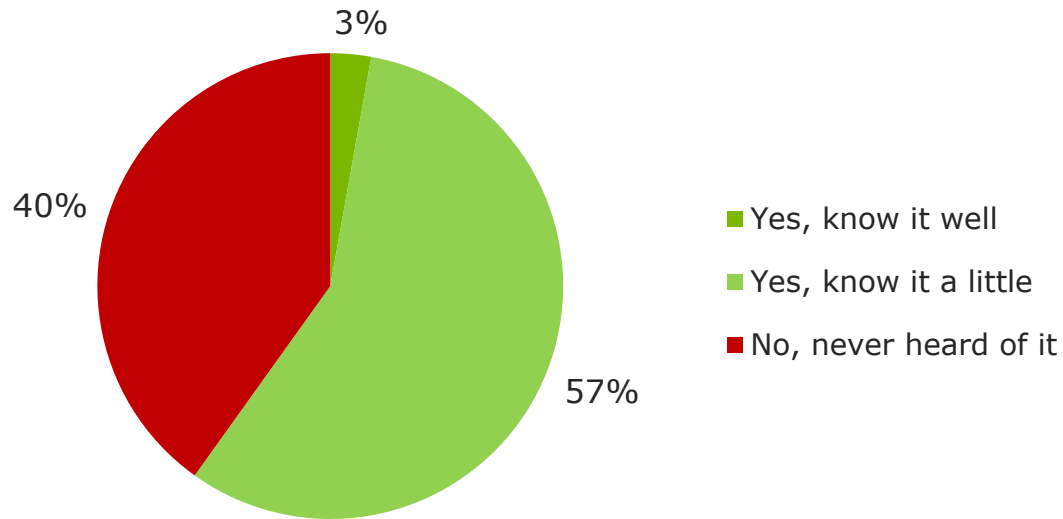
HA Owner n=456





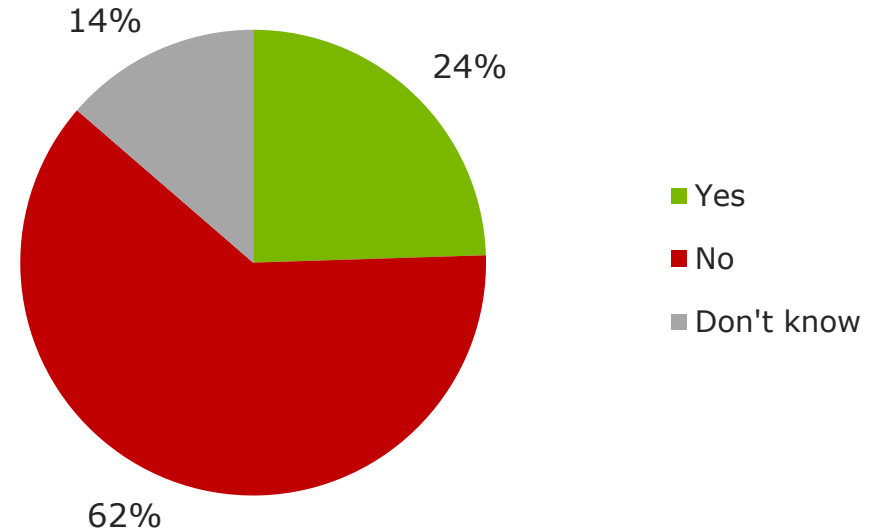
40% of the population in CHN have never heard of Cochlear Implants. 24% of the HA owners with severe/profound HL have been informed about CIs by a medical professional

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



n=3'522

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



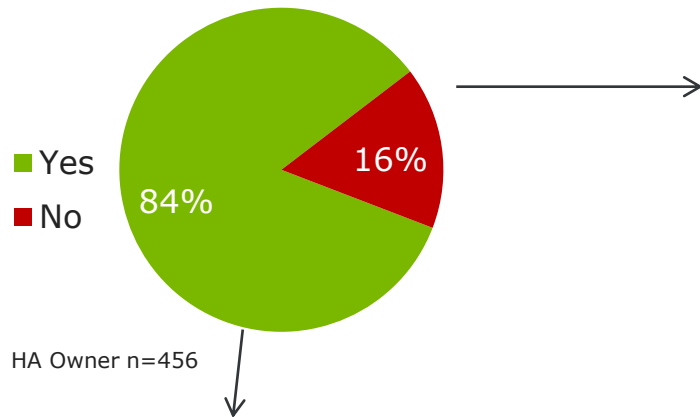
n=178 (HA Owner with severe/profound HL)



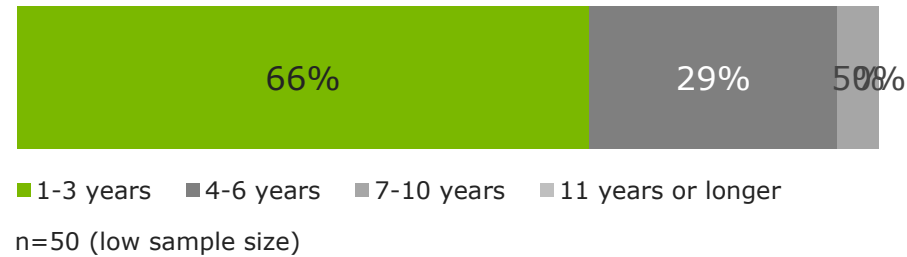


85% of current users are first time users. More than 50% claim that they purchased hearing aids within 1 year of becoming aware of the hearing loss

Current HAs = first HAs?



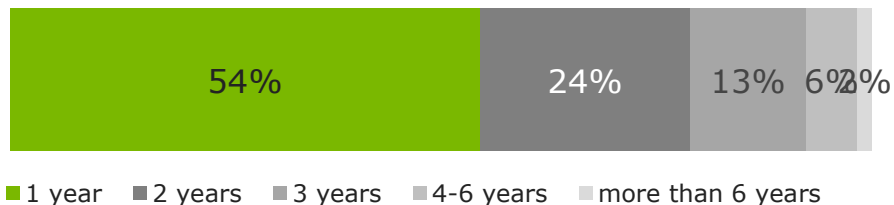
How many years did you own your previous HAs?



Age of HA before it has been replaced:
 2023: 3 years (median)
 2020: 3 years (median)

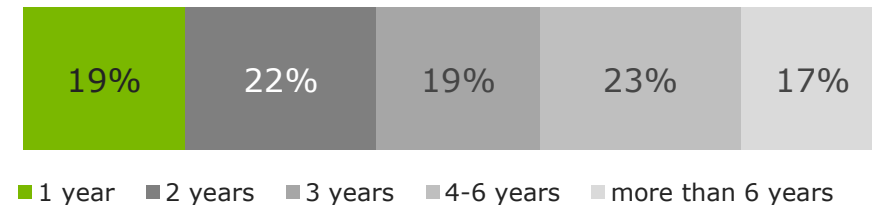
HA Owner (1st HA):

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?



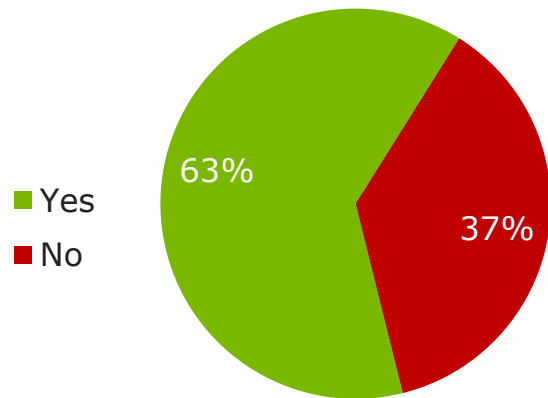
HA Non-owner:

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



63% of all HA owners think they should have gotten their HAs sooner! The main reason is missing out on mental and emotional health

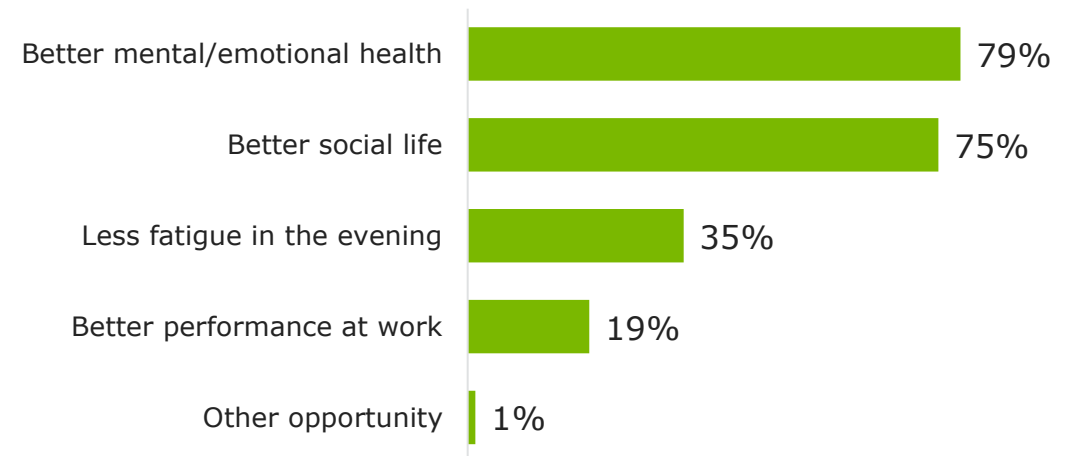
Thinking back before you obtained your first hearing aid(s): do you think, you should have gotten them sooner?



HA Owner n=456

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



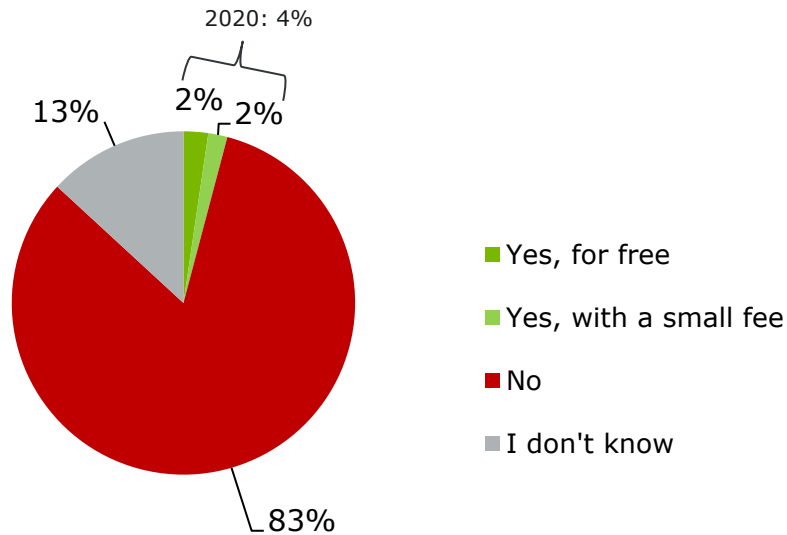
n=310



Almost no hearing aid owners received hearing aids as a give away, also awareness among non owners for those give aways is very low

HA Owner:

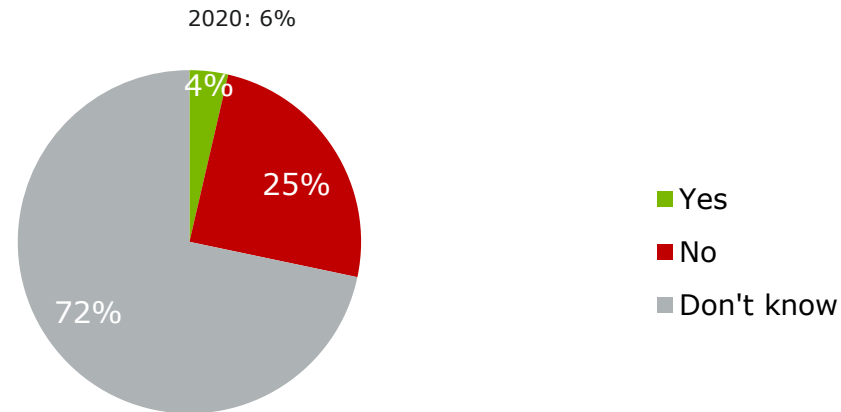
Did you receive your current hearing aids as a give away?



HA Owner n=456

HA Non-owner:

Do you know that there are give away hearing aids from time to time for free?

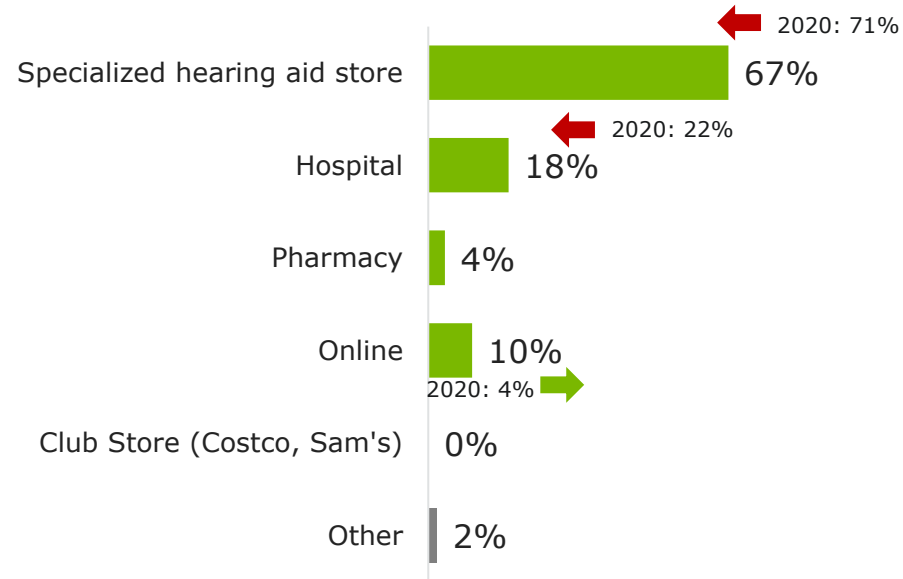


HA Non-owner n=392

Specialized hearing aid stores seem to gain in relevance vs. hospitals – but for those who bought hearing aids, the online channel gets more critical

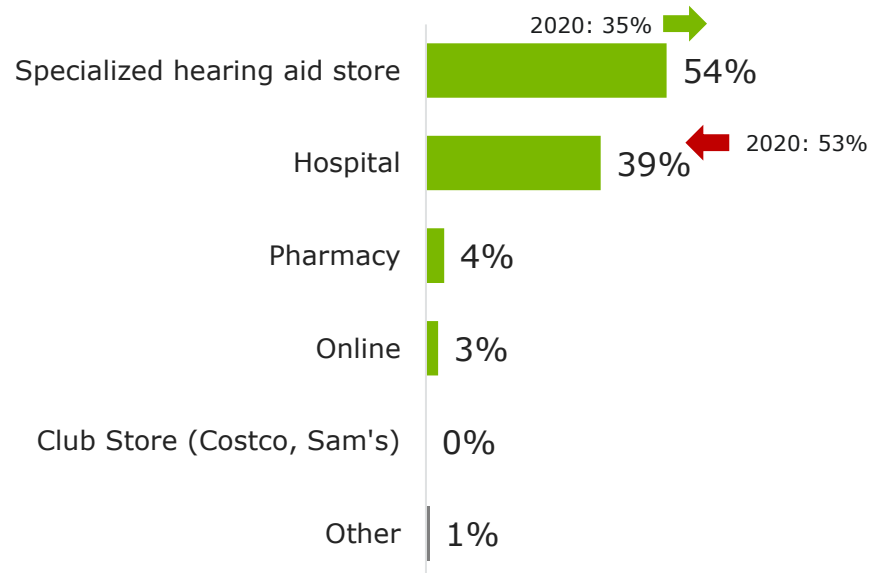
HA Owner:

Where was your most current hearing aid obtained? HA Owner n=456



HA Non-owner:

If you were to get hearing aids, where would you go? HA Non-owner n=392



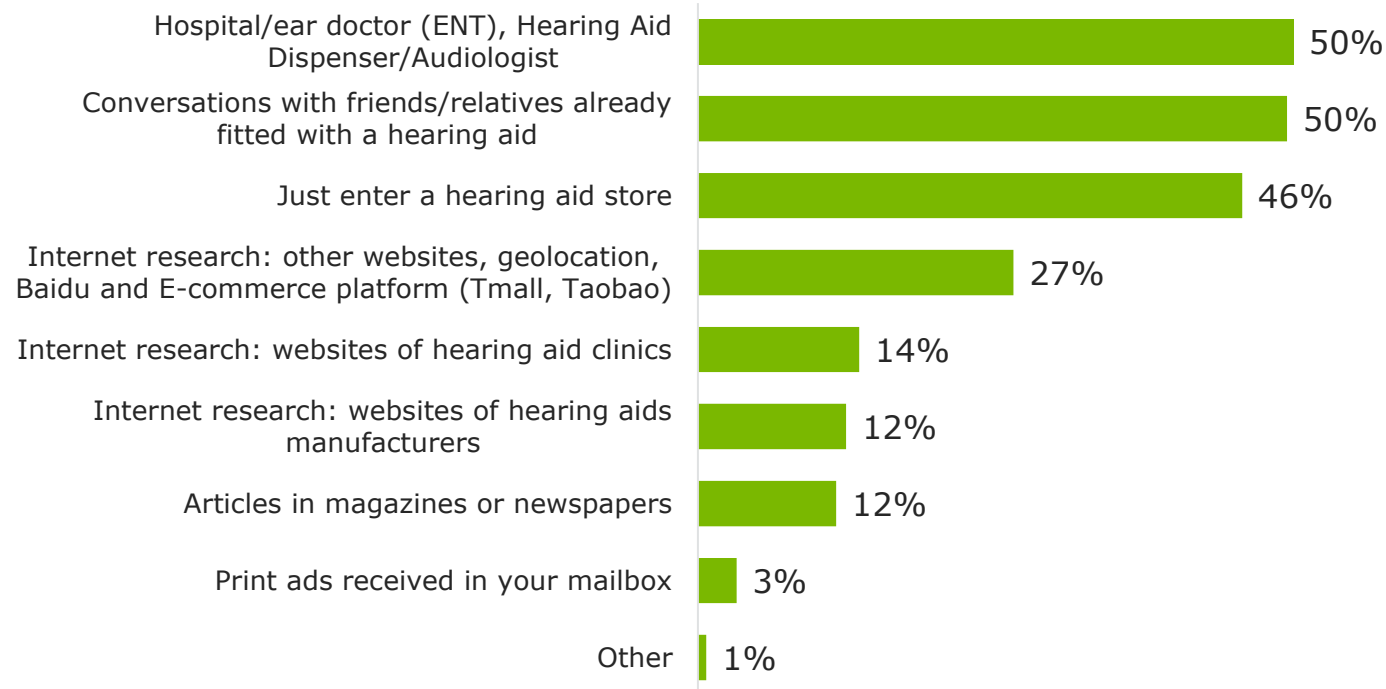
Trend analysis

	Year of purchase		
	2018/2019	2020/2021	2022/2023
Unweighted Sample Size	33	270	131
Specialized hearing aid store	50%	73%	64%
Hospital	25%	20%	15%
Online	4%	6%	20%



Hospital/ENT/Audiologist, friends, and just entering a store are the most essential sources of information for the HA purchase channel

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



HA-owner, N=471

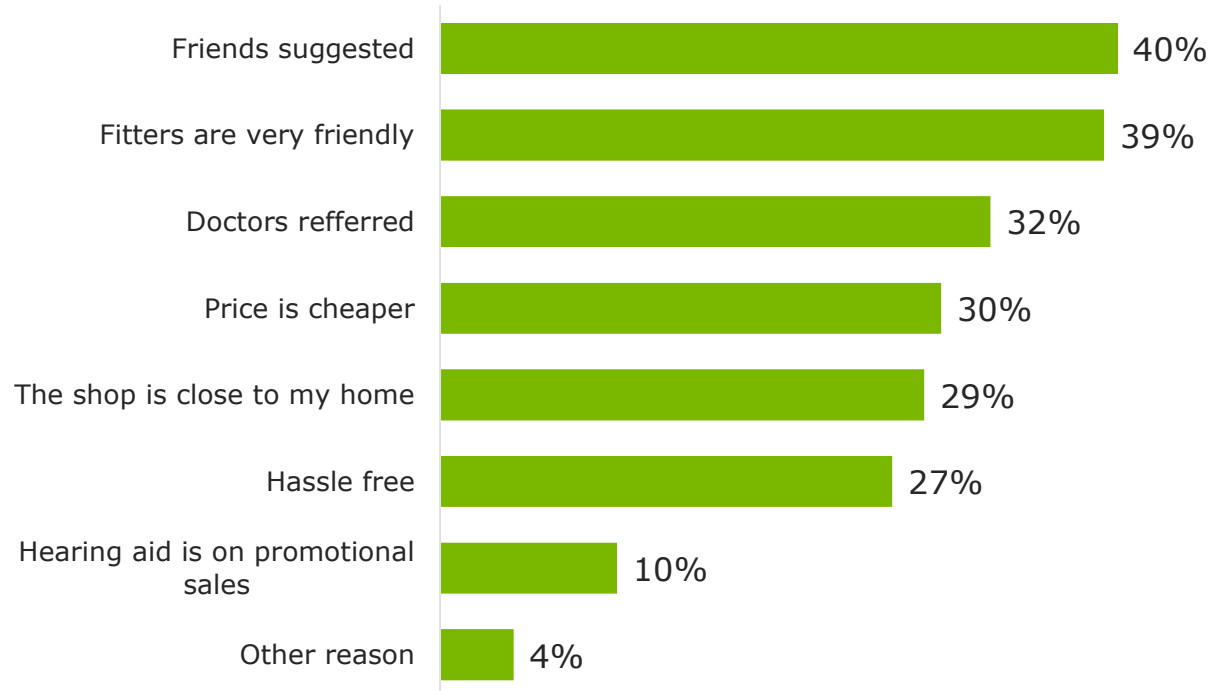
China specific question





Friends suggestions and friendly fitters followed by doctor referrals, are most important when deciding on the purchase channel for hearing aids

Why did you purchase your hearing aids through this channel?



HA-owner, N=456

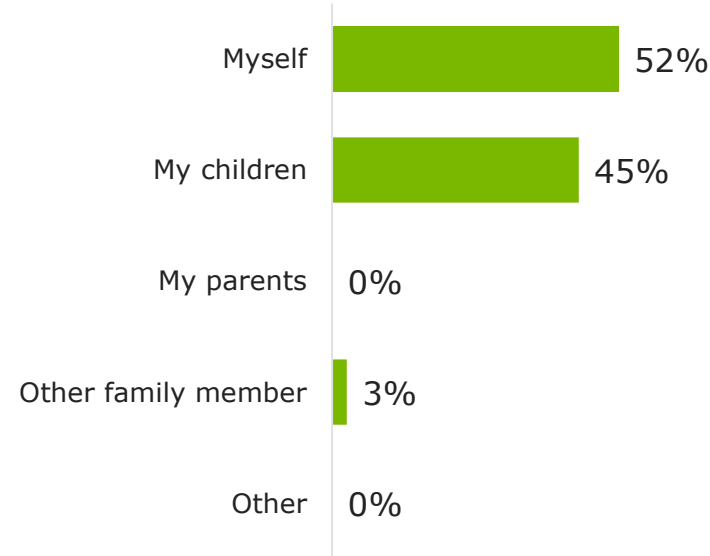
China specific question





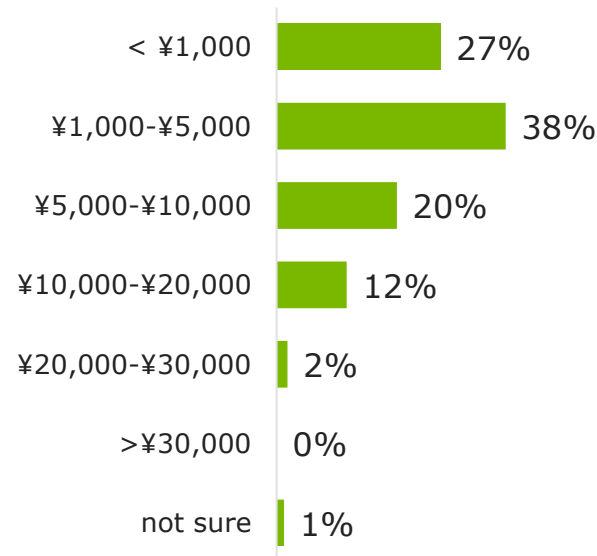
Almost half of the hearing aid owners got them paid by their children.

Who paid for your hearing aids?



HA-owner, N=456

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

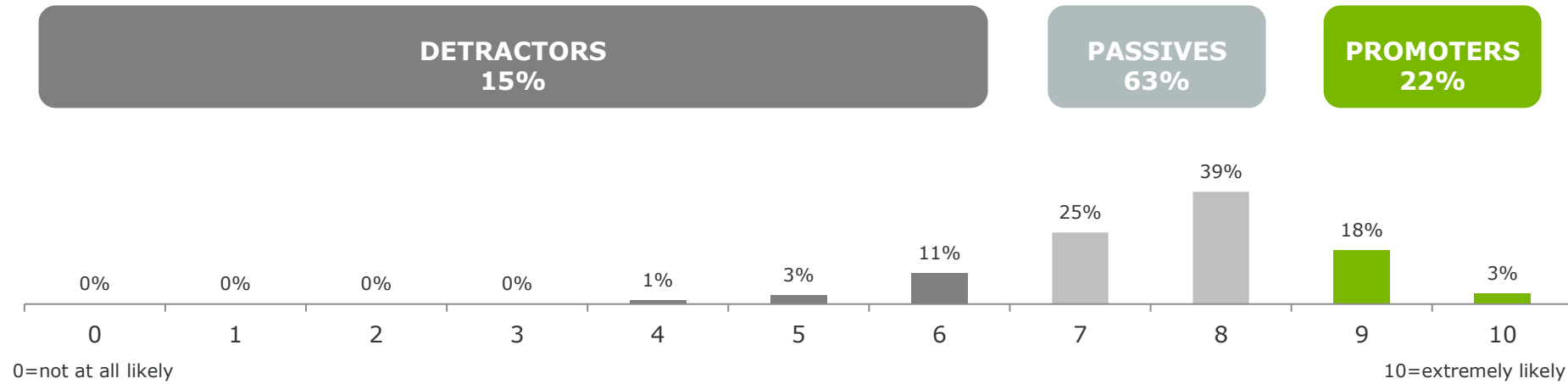


China specific questions



Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 7

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 = 7 (exact figure rounded) 2020: 15%

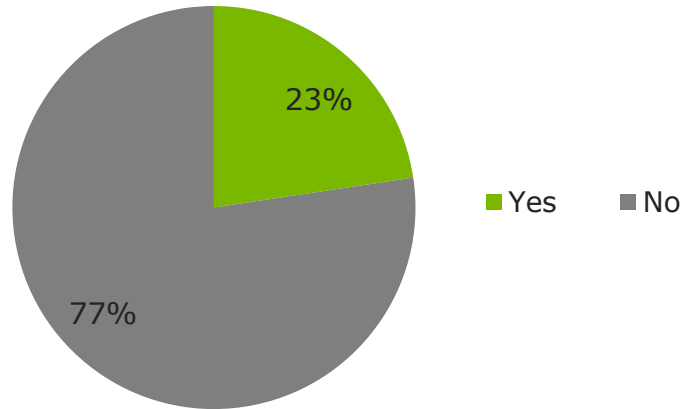
HA Owner n=456





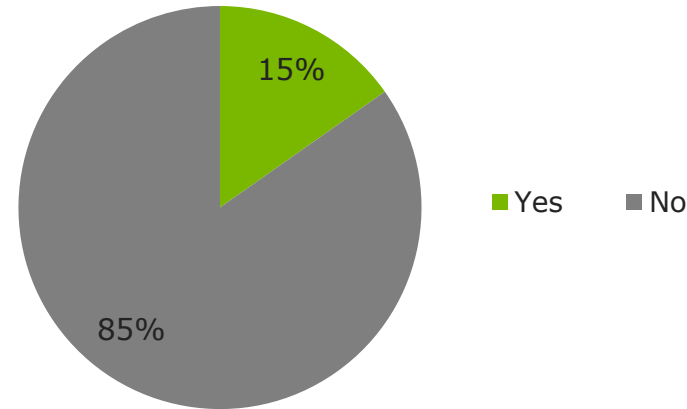
Online purchases of hearing aids have been considered by 23% of current HA owners (and only 15% of the non-owners)

Owners: Have you ever considered purchasing hearing aids online?



HA-owner, n=428

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



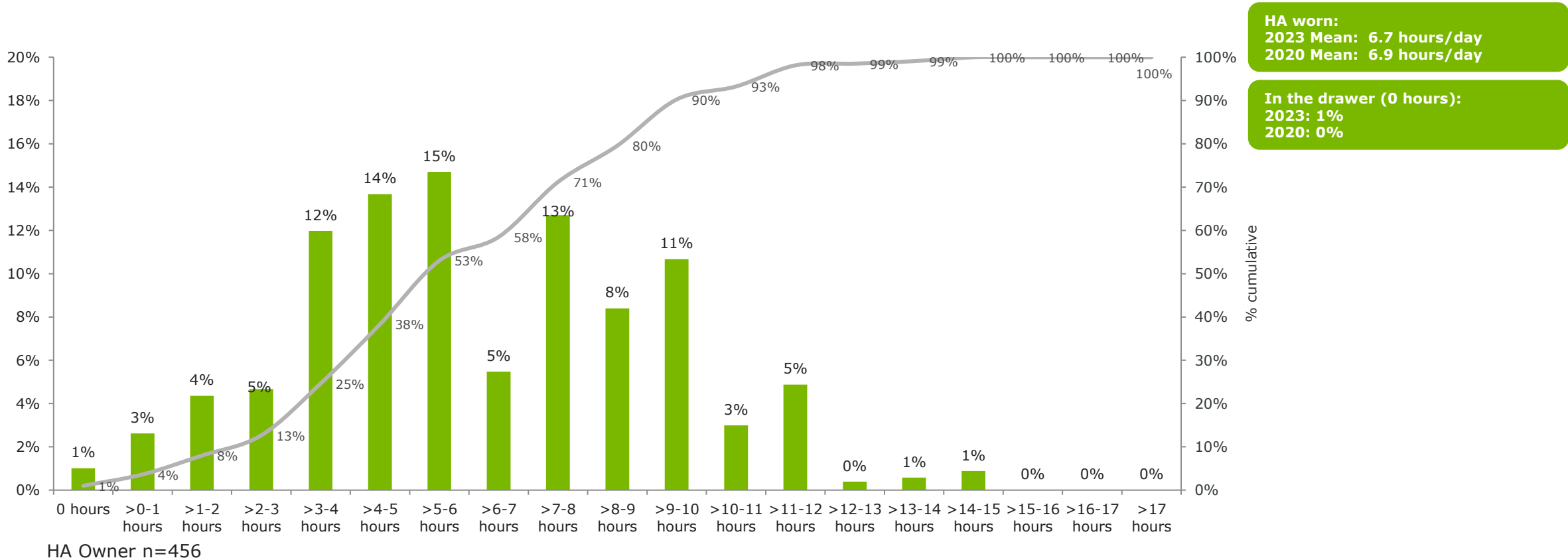
HA-non-owners, n=380

China specific question



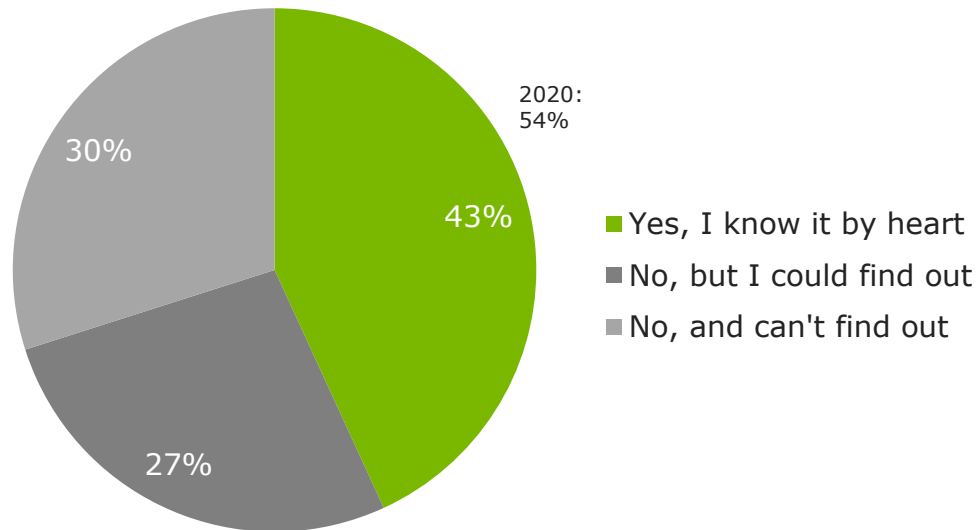
On average, HAs are worn 6.7 hours a day

How many hours a day are HA worn?



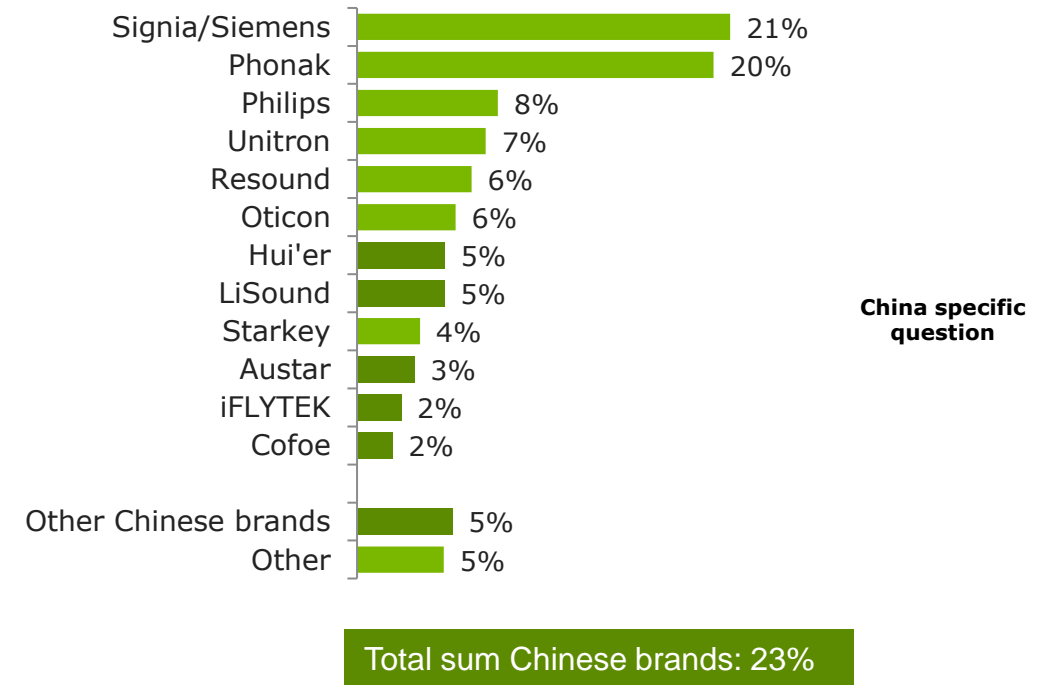
43% of today's hearing aid owners are aware of their hearing aid brand

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



HA Owner n=456

If Yes/can find out: What is the brand of your hearing aid(s)?

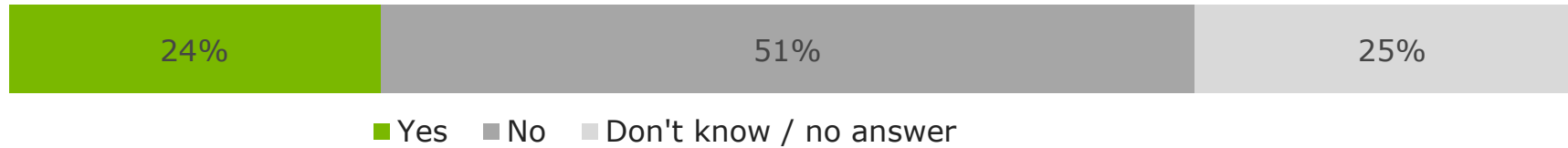


HA Owner, brand aware n=345



24% of the HA owners use a hearing aid app, and 81% are satisfied with it

Have you been informed by your hearing care professional about hearing aid apps?
(HA Owner n=456)



Do you personally use apps for your hearing aids?
(HA Owner n=456)

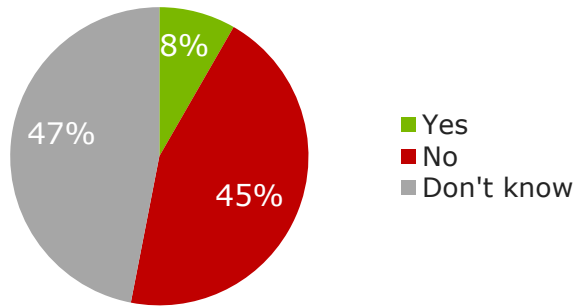


IF APPS USED (n=79):
Overall, how satisfied with the performance of your apps?



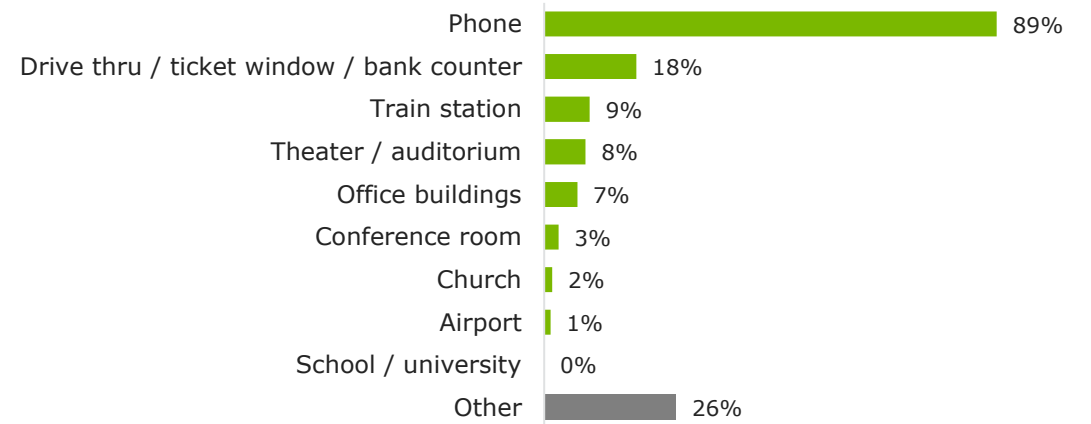
8% of the HAs are (to the knowledge of the owners) equipped with Telecoil — the main usage of Telecoil is the phone

Are your hearing aids equipped with Telecoil?



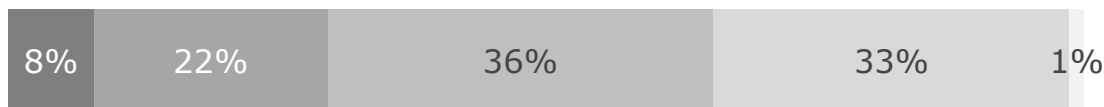
HA Owner n=456

Where do you use your telecoil to improve your hearing?



HA Owner (use Telecoil), n=47

How often do you use the telecoil to improve your hearing?



■ Never ■ Rarely ■ Occasionally ■ Often ■ Very often

HA Owner (equipped with Telecoil), n=47

How satisfied are you with the telecoil option?



■ Very dissatisfied ■ Dissatisfied ■ Somewhat Dissatisfied ■ Neutral ■ Somewhat Satisfied ■ Satisfied ■ Very Satisfied

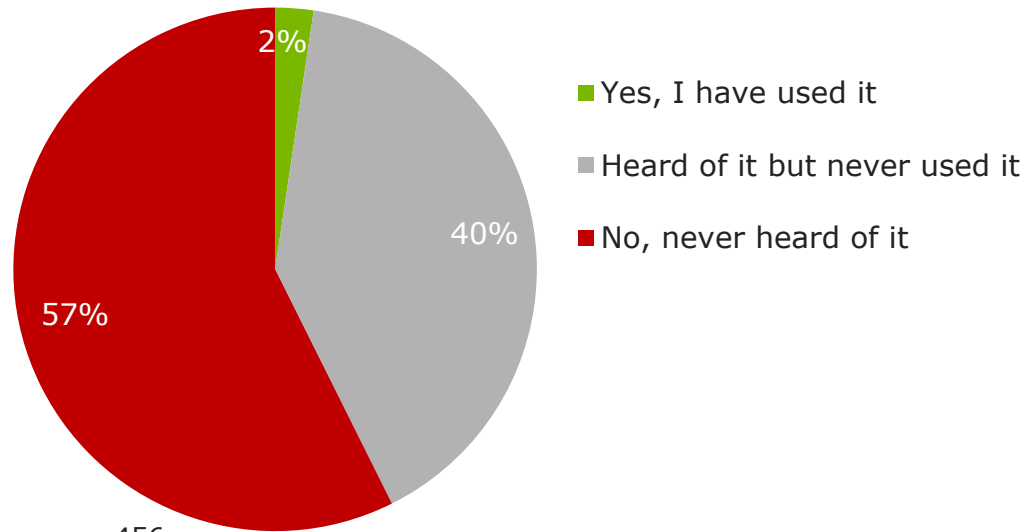
HA Owner (use Telecoil), n=42



2% of the HA owners have already used remote fitting, 40% have at least heard of it, and 57% have never heard of it

Have you ever heard of Remote fitting 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=456

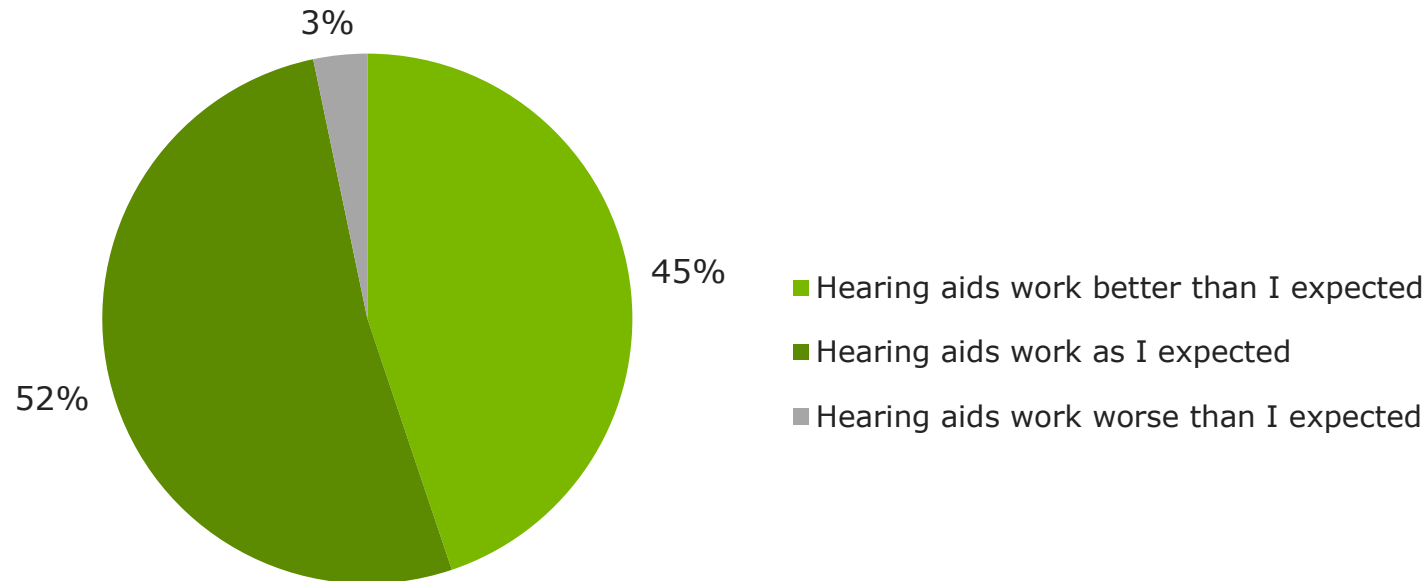


Satisfaction with hearing aids and drivers



97% (2020: 95%) of hearing aid owners say their hearing aid works better than or as expected

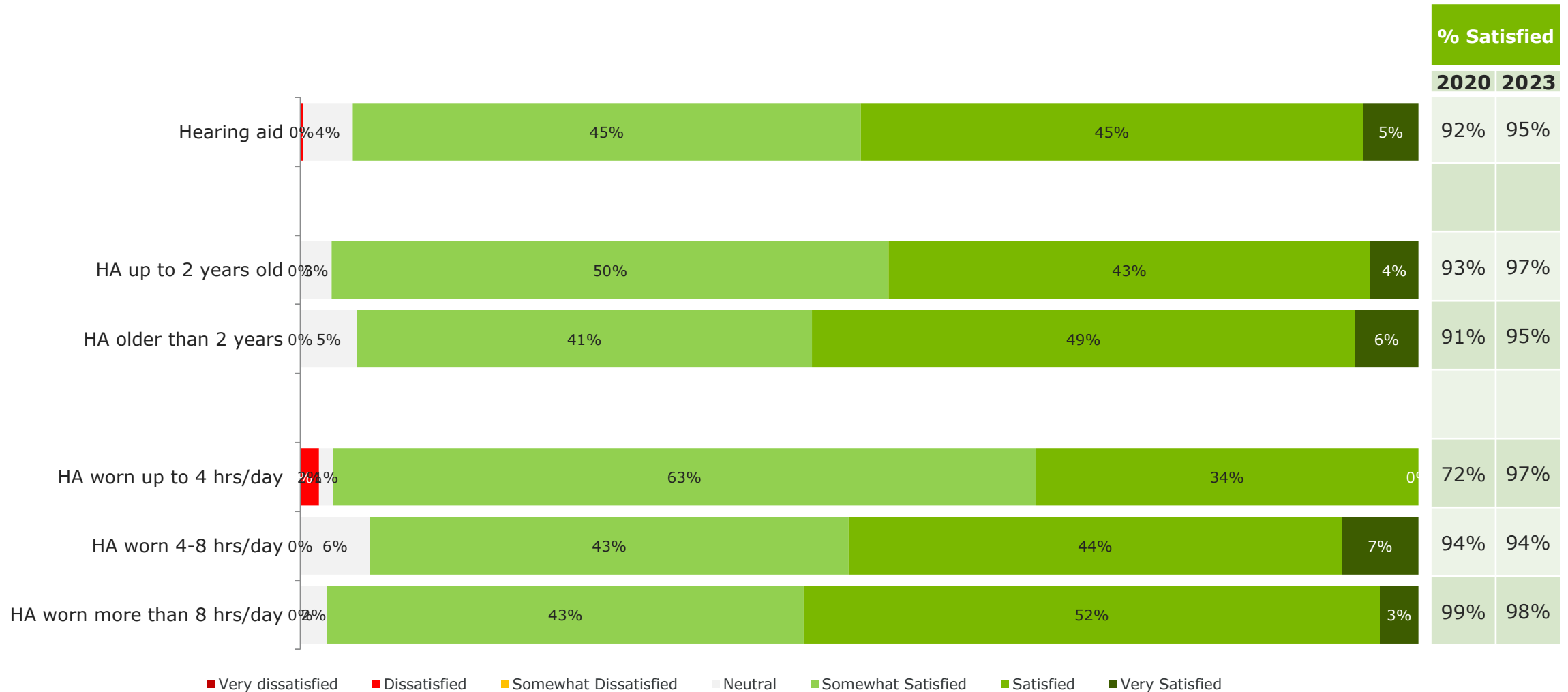
How have the expectations you had towards hearing aids before trying them on for the first time been met?



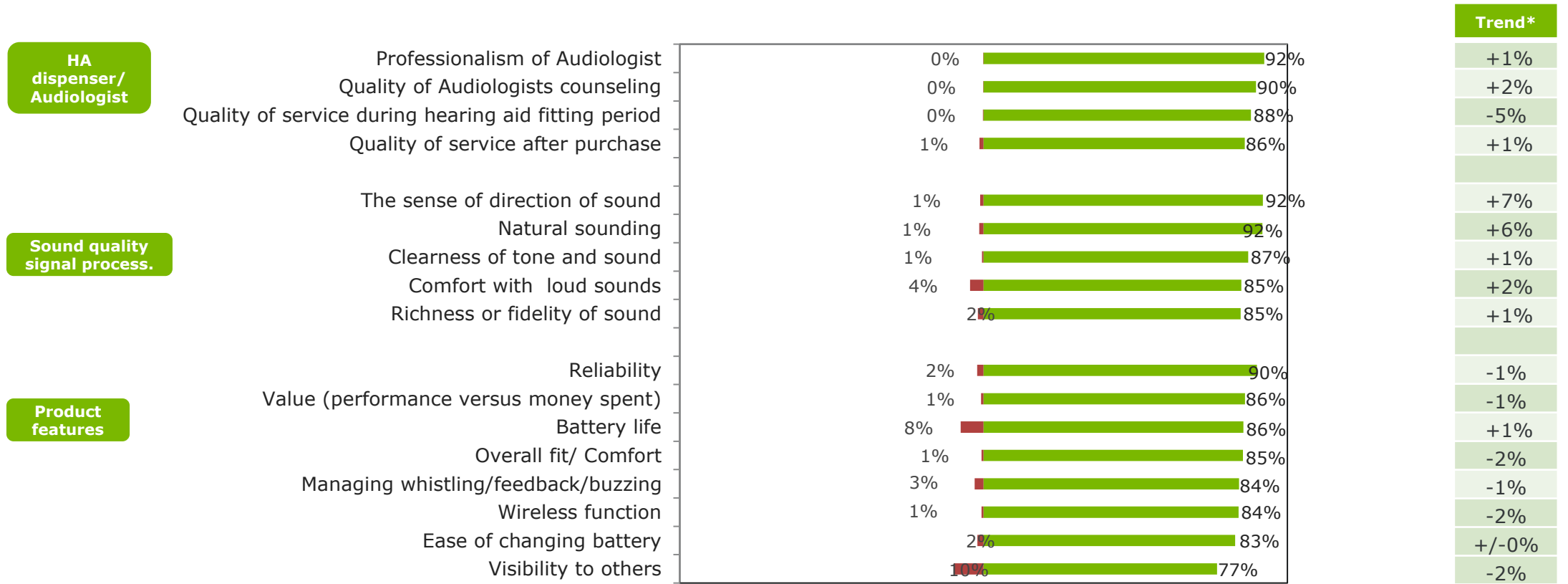
n=456



Overall satisfaction with HA: 95% of hearing aid owners are satisfied with their hearing aid(s) (2020: 92%)



Satisfaction with current hearing aids



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

*% of satisfied HA Owners compared to 2020

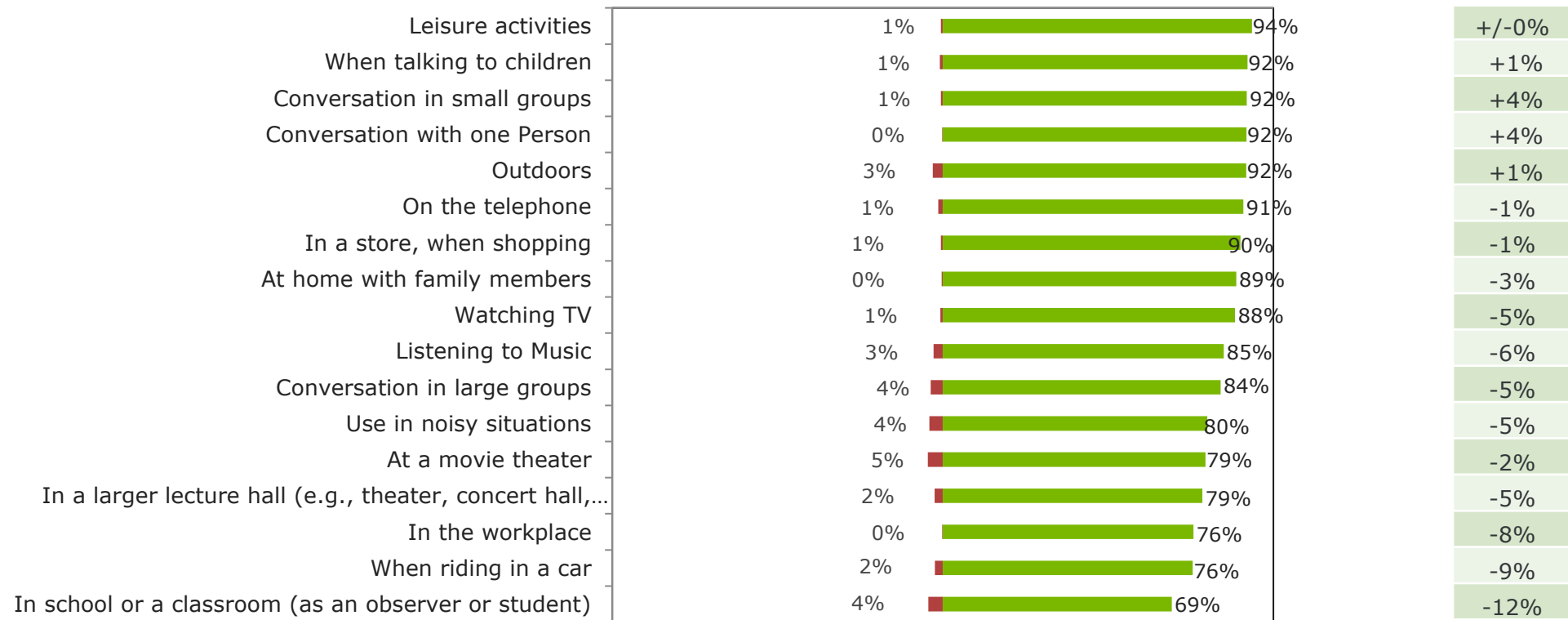
■ dissatisfied ■ satisfied

HA Owner n=456



Satisfaction with current hearing aids

Listening situations



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

■ dissatisfied ■ satisfied

*% of satisfied HA Owners compared to 2020

HA Owner n=456



Factors influencing satisfaction with current HA: Reliability is most important for overall satisfaction with HA

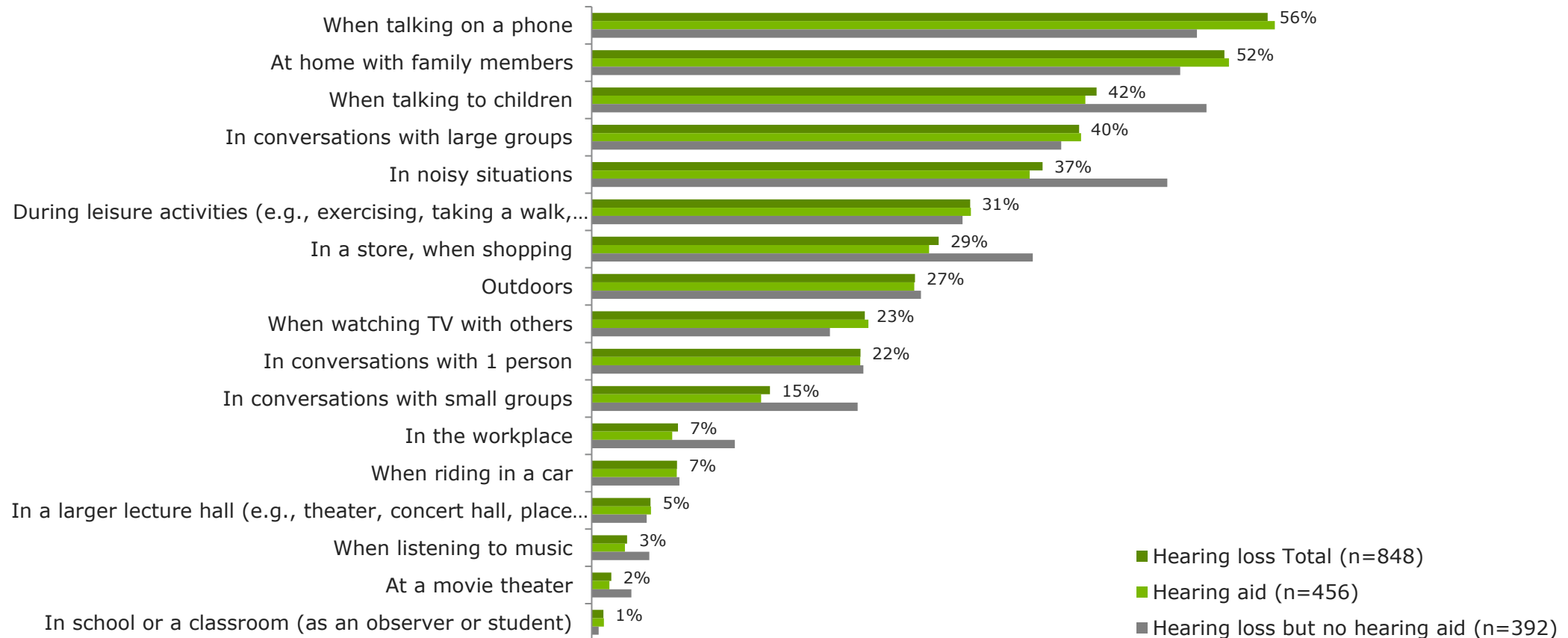
Influence on overall satisfaction with HA*

HA dispenser / Audiologist	Quality of service during hearing aid fitting period	0.51
	Quality of service after purchase	0.49
	Quality of HA dispensers / Audiologists counseling	0.47
	Professionalism of Hearing aid dispenser / Audiologist	0.42
Sound quality signal processing	Comfort with loud sounds	0.49
	Clearness of tone and sound	0.48
	Richness or fidelity of sound	0.48
	Natural sounding	0.46
	The sense of direction of sound	0.44
Product features	Overall fit/ Comfort	0.50
	Reliability	0.47
	Managing whistling/feedback/buzzing	0.39
	Wireless function	0.39
	Ease of changing battery	0.38
	Value (performance versus money spent)	0.36
	Battery life	0.30
	Visibility to others	0.24

*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)





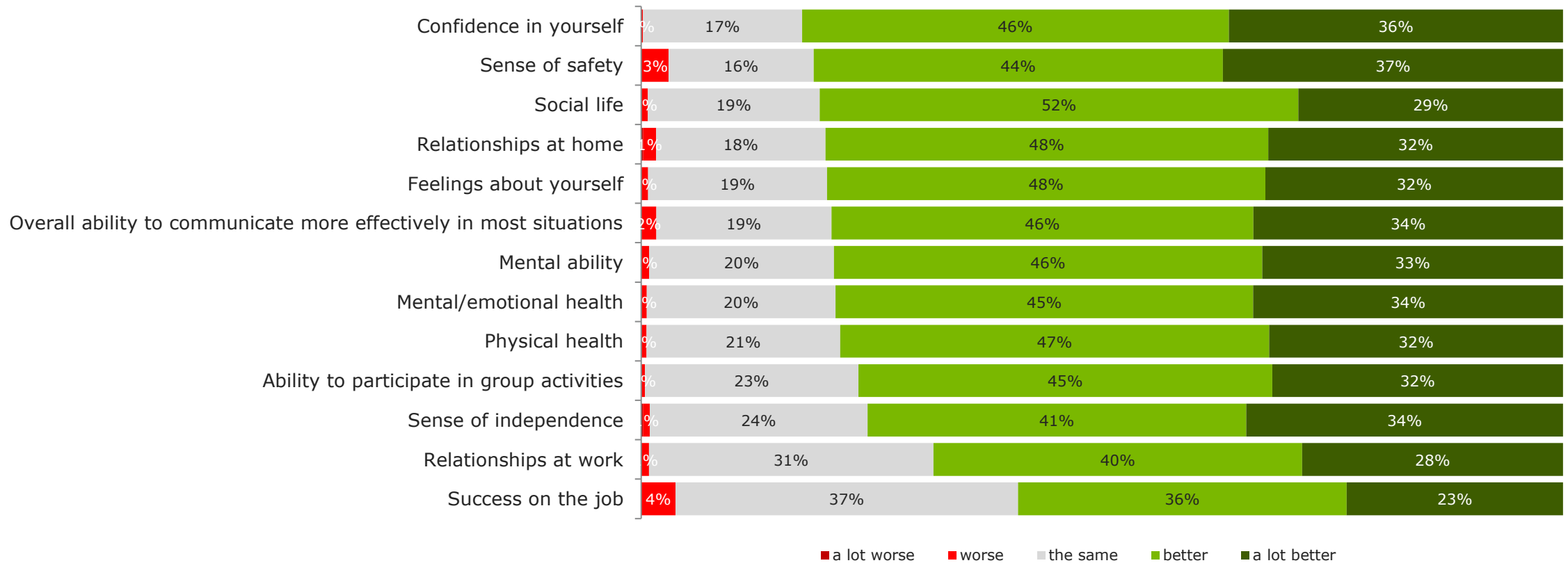
Positive impact of hearing aids, quality of life





Significant positive impact of hearing aids on different aspects: Self-confidence, sense of safety, social life, and many others 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).



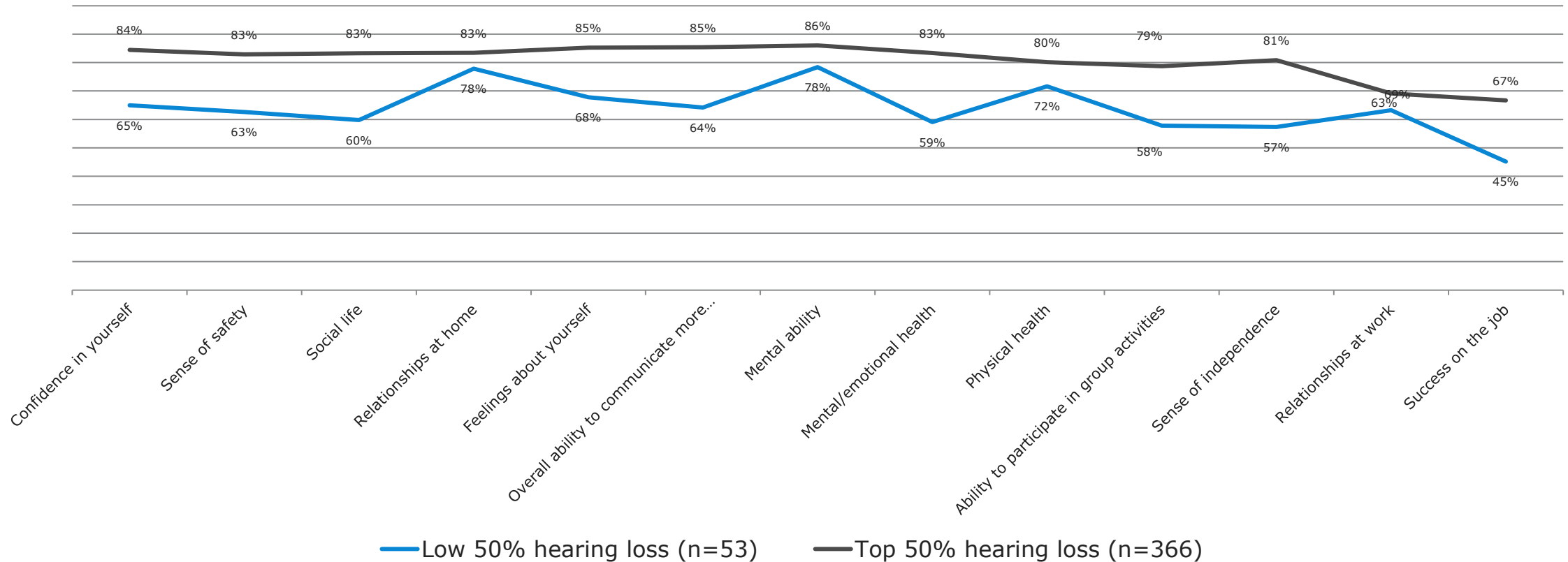
HA Owner n=456





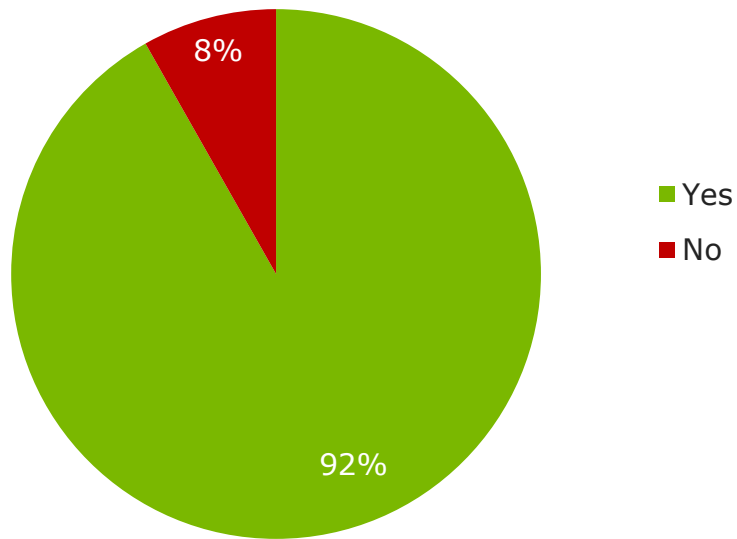
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA Owners feeling better/a lot better



92% of 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?

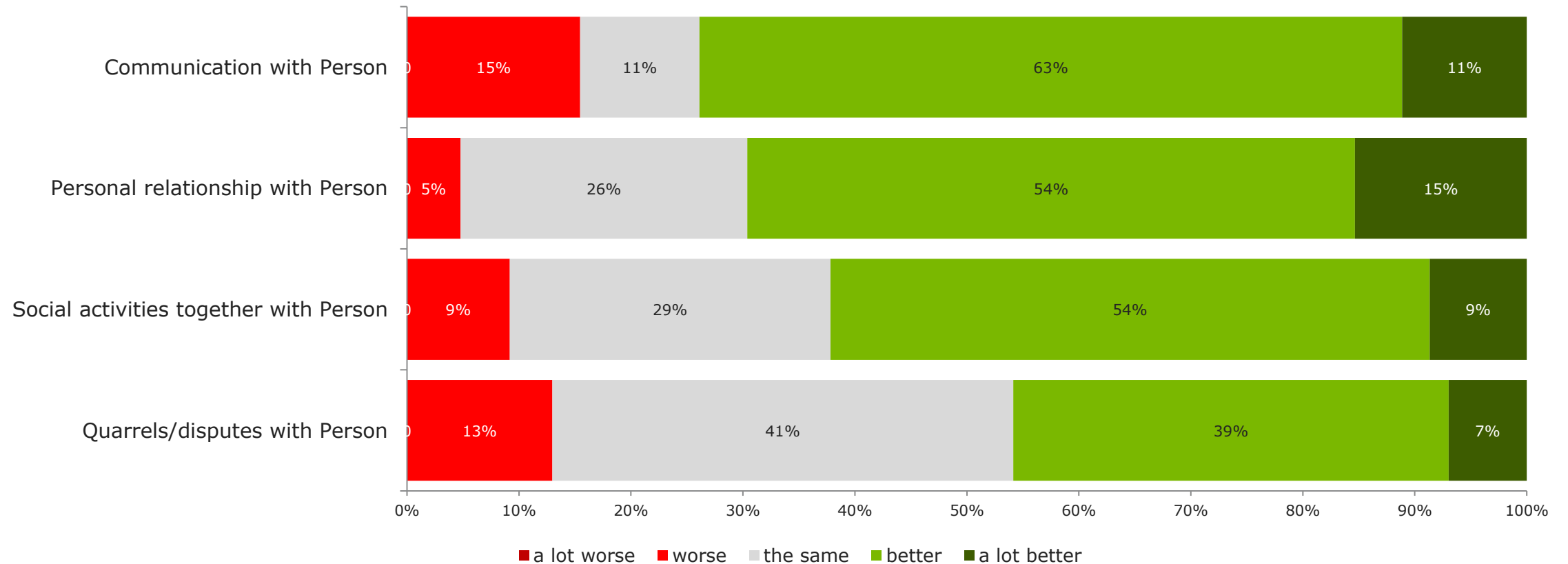


n=456



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?

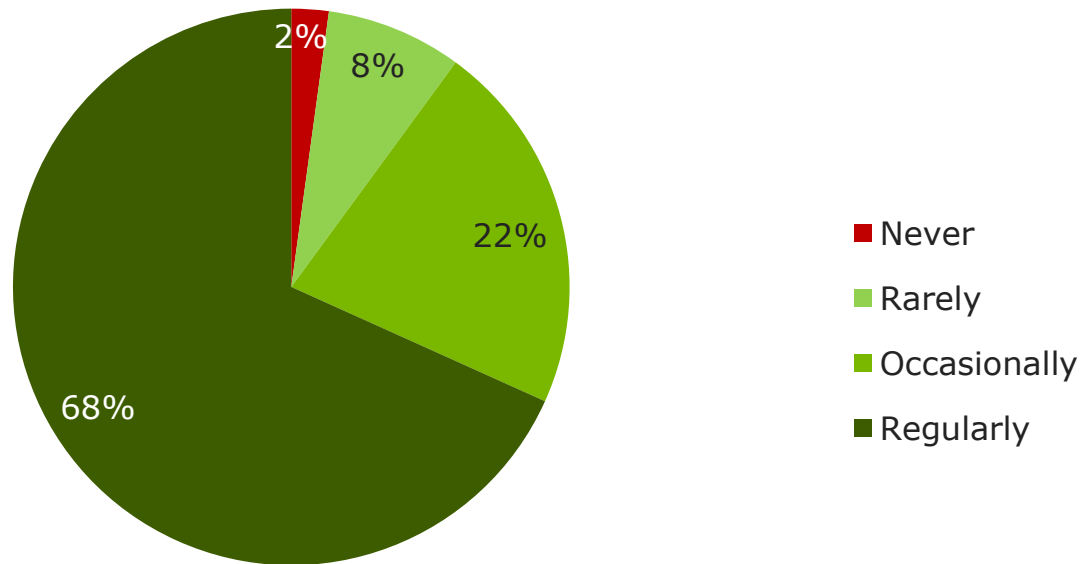


Someone in HH / parent has HA, n=54



98% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

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



n=456

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

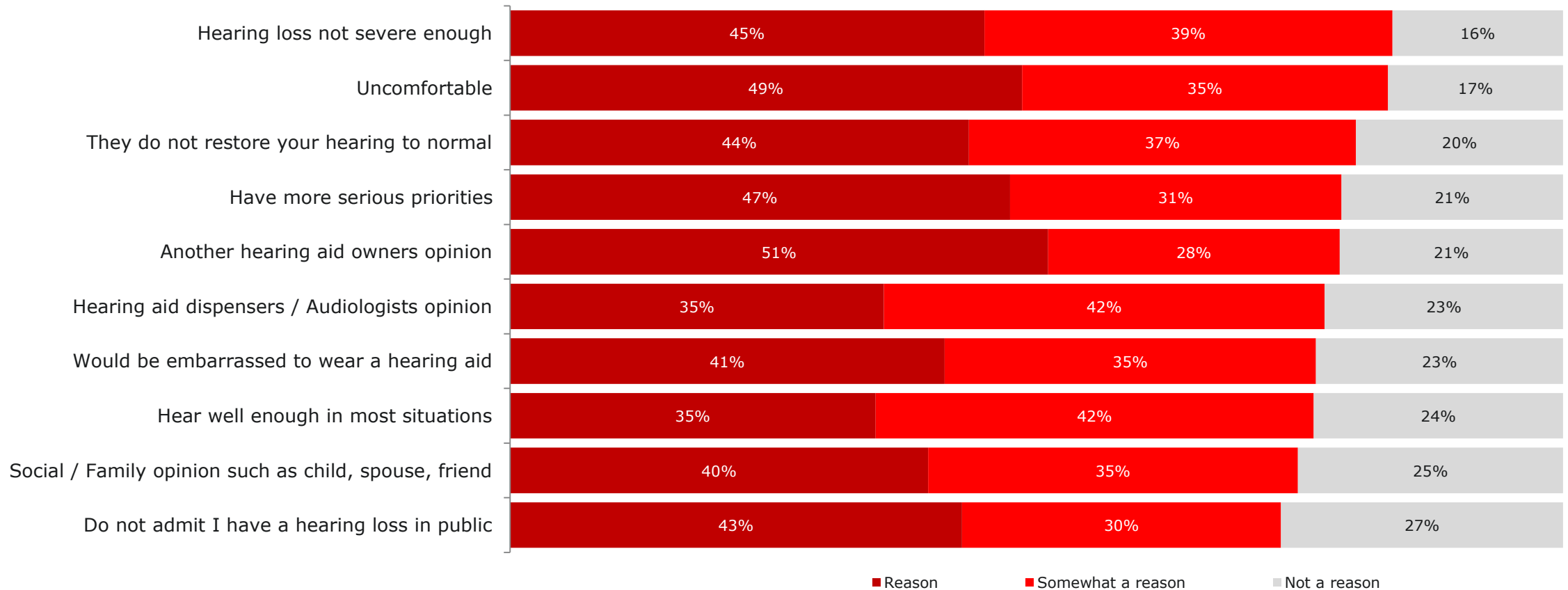
	HA Owner n=456	HA Non-owner low 50% HL n=166	HA Non-owner Top 50% HL n=124
Ears impaired (stated)			
Unilateral loss	65%	78%	45%
Bilateral loss	35%	22%	55%
Perceived loss			
Mild	12%	81%	20%
Moderate	46%	17%	56%
Severe	38%	2%	21%
Profound	5%	0%	3%

← More similar hearing loss-structure →





Top 10 reasons for not having a hearing aid

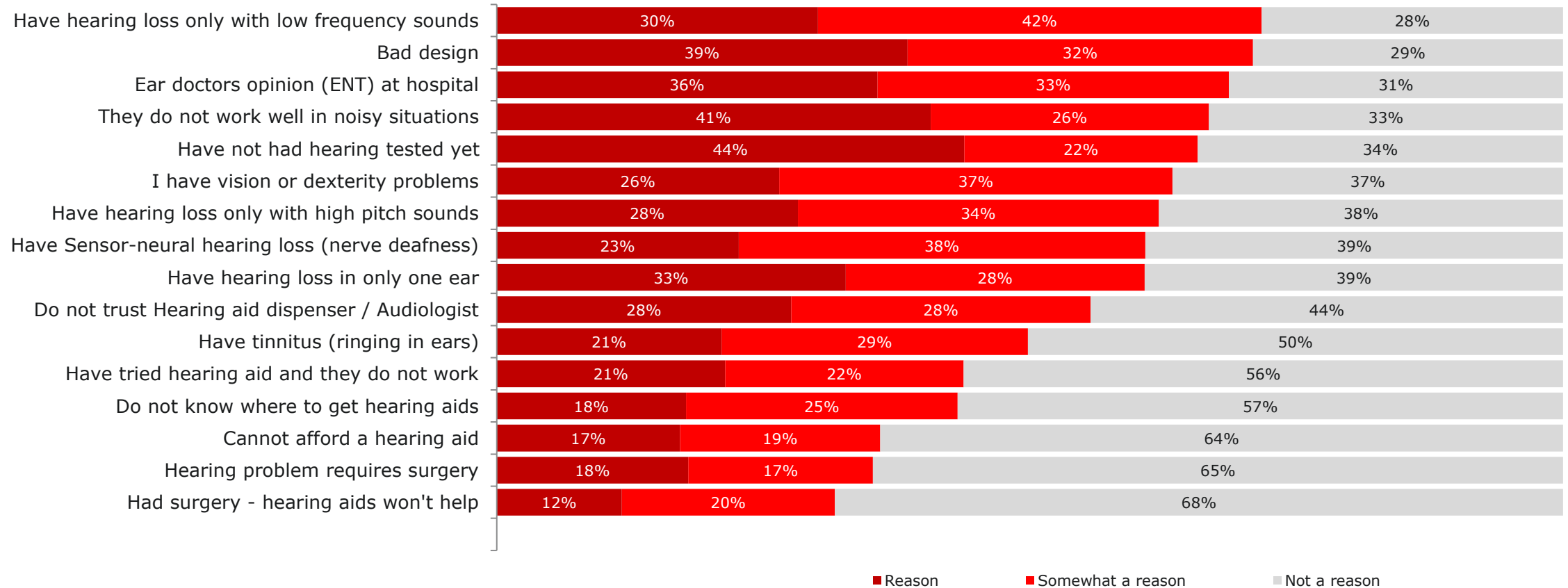


Non-Owner Top 50% hearing loss n=124





Less important reasons for not having a hearing aid



HA Non-owner Top 50% hearing loss n=124

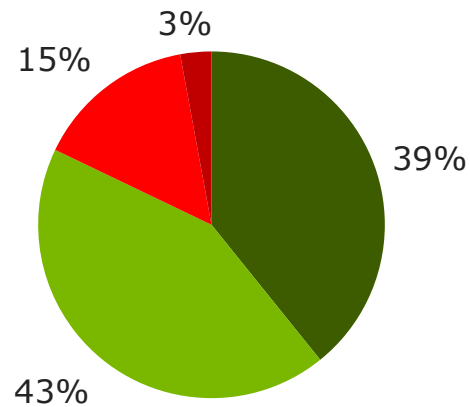


Social rejection because of hearing loss compared to the acceptance of hearing aids

39% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. Somebody is more likely to make fun of or deny a hearing impaired without hearing aids

HA Owner:

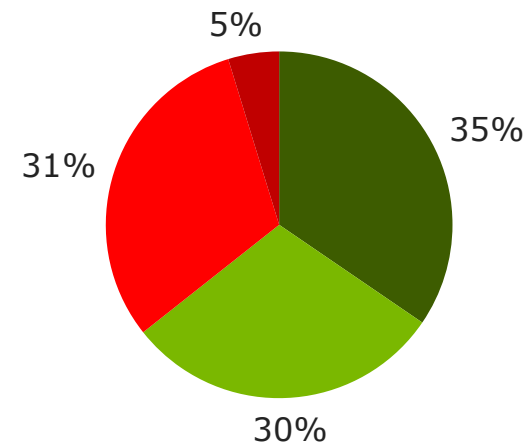
How often do you feel you are made fun of or rejected because you are wearing a hearing aid?



HA Owner n=456

HA Non-owner:

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



HA Non-owner Top 50% hearing loss n=124

- Never
- Rarely
- Occasionally
- Regularly



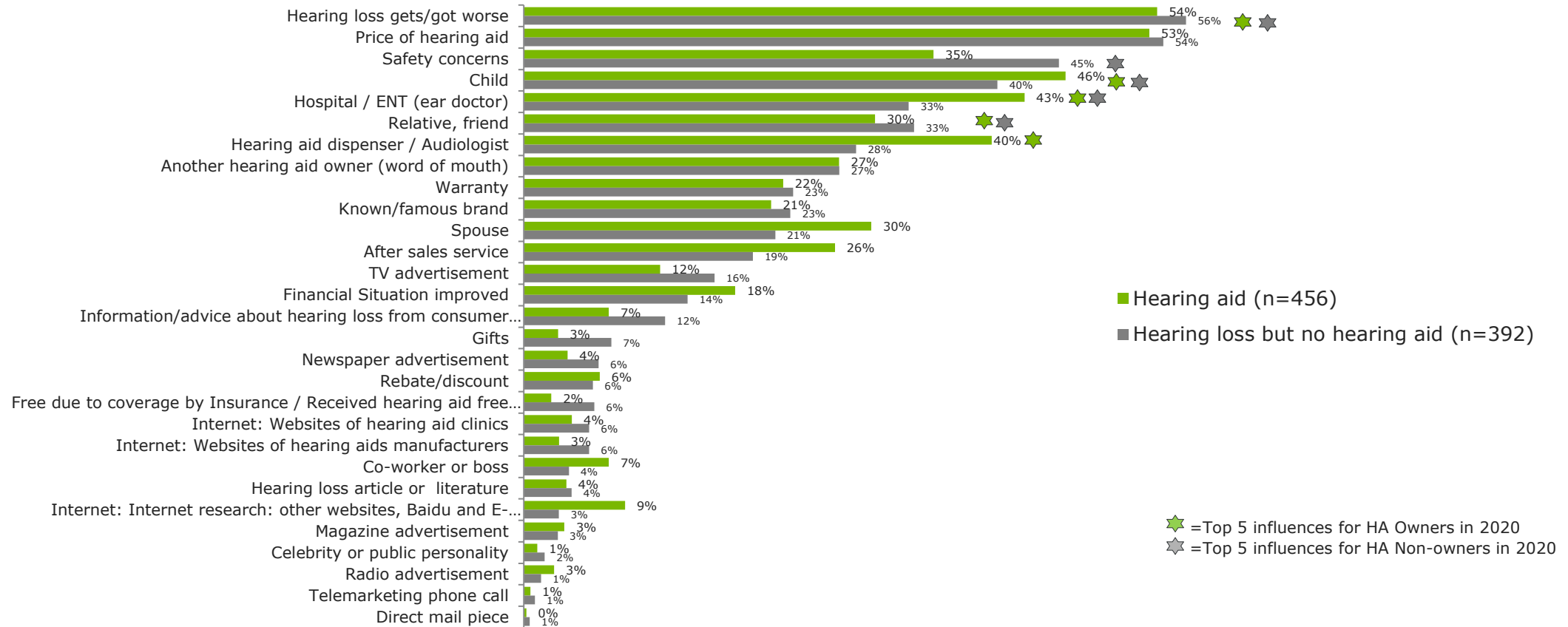
Most important triggers to buy



The most important influencing factors for HA owners were worsening hearing loss, price, gatekeepers (as hospital/ENT and Audiologist), and significant others (as spouse, child, relatives)

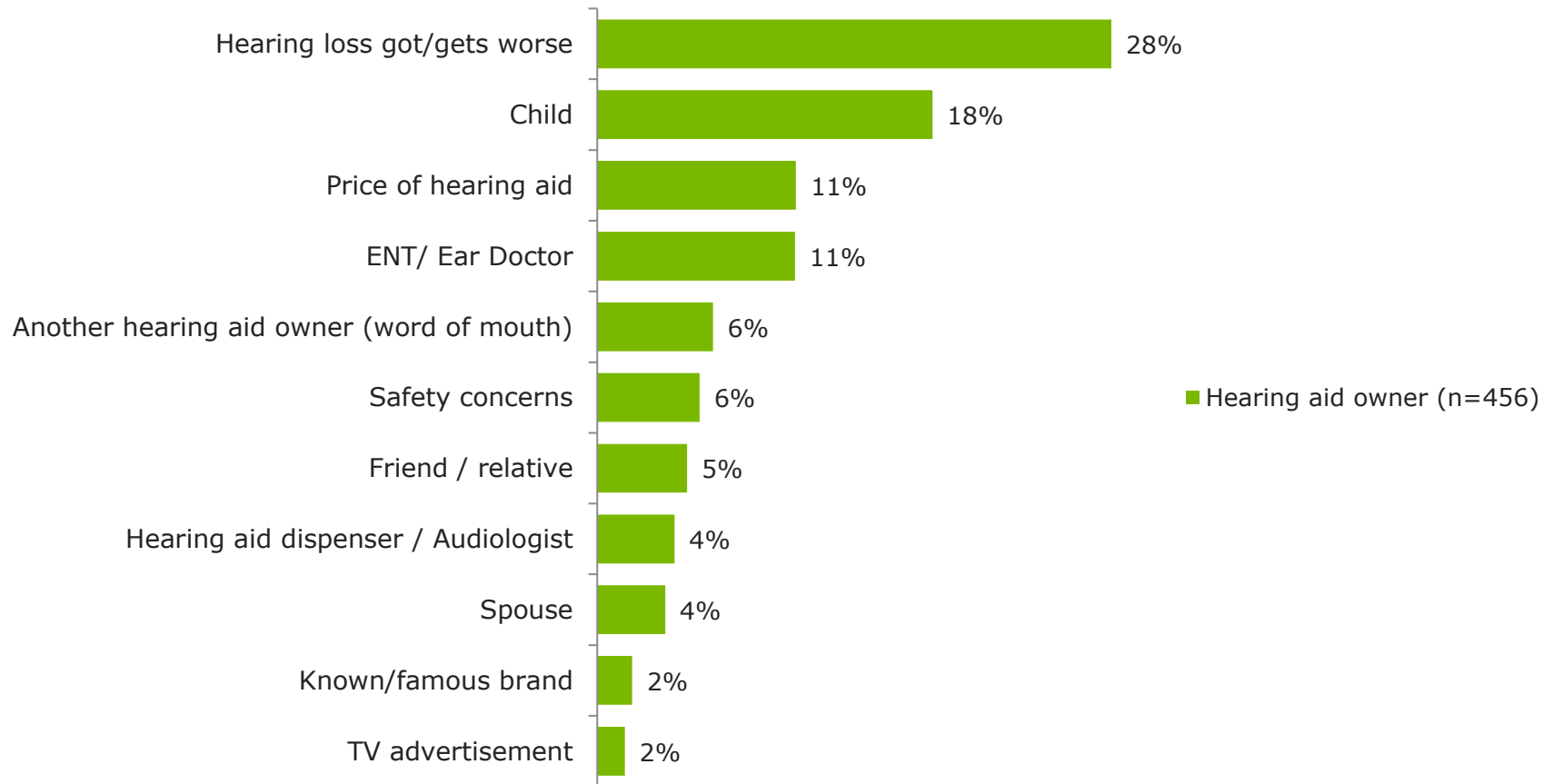
HA Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?

HA Non-owner: What do you think would influence you to obtain / purchase a hearing aid ?



The most crucial trigger to buy a hearing aid is worsening hearing loss, followed by a child

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





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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 (HA Non-owner)	Hearing aids (HA Owner)
Gender						
Male	6'771	4.4%	8.5%	50.9%	53.7%	49.0%
Female	6'495	4.0%	10.1%	49.1%	46.3%	51.0%
Age						
1 - 14	2'186	0.1%	0.0%	17.2%	0.4%	0.0%
15 - 24	1'444	0.1%	0.0%	11.3%	0.3%	0.0%
25 - 34	1'992	0.3%	0.0%	15.6%	1.1%	0.0%
35 - 44	1'959	0.3%	16.1%	15.4%	1.1%	2.0%
45 - 54	2'064	1.5%	13.0%	16.0%	5.4%	8.0%
55 - 64	1'748	5.6%	9.8%	13.0%	17.6%	18.8%
65 - 74	1'245	15.5%	10.3%	8.3%	34.4%	38.8%
74+	628	34.4%	7.7%	3.2%	39.7%	32.4%
Type of household						
single household	286	10.4%	20.2%	2.0%	4.7%	11.7%
Couple, no kids	2'004	8.2%	7.9%	14.5%	30.1%	25.3%
Couple with kid(s)	9'528	2.7%	8.6%	73.0%	46.3%	42.6%
Single mom/dad with kid(s)	314	4.5%	24.7%	2.4%	2.1%	6.9%
Retirement home, hospital etc.	112	28.6%	5.5%	0.6%	6.0%	3.4%
Other	1'023	5.8%	8.8%	7.6%	10.7%	10.1%

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 (HA Non-owner)	Hearing aids (HA Owner)
Status						
The head of the household (alone or together with someone)	4'161	6.5%	10.2%	30.6%	48.6%	54.0%
The spouse of the head of the household	3'551	3.5%	7.5%	27.0%	23.0%	18.3%
Daughter/son of head of household	4'273	0.2%	0.0%	33.6%	1.4%	0.0%
Living-in with my grown up children	662	18.6%	10.0%	4.2%	22.1%	24.1%
Other person	619	4.3%	7.1%	4.7%	4.9%	3.6%
Employment						
Full time employed	6'064	0.8%	11.6%	57.9%	8.7%	11.1%
Part time employed	908	2.5%	5.7%	8.5%	4.2%	2.5%
Unemployed / not working	630	10.0%	2.7%	5.5%	12.2%	3.3%
Retired under a disability pension scheme (fully or partly)	9	21.8%	0.0%	0.1%	0.4%	0.0%
Early retired under an early retirement benefit scheme	38	6.2%	0.0%	0.3%	0.5%	0.0%
Retired (at the official retirement age)	2'431	16.9%	10.4%	19.5%	73.4%	83.1%
Student / pupil / in training	862	0.3%	0.0%	8.3%	0.6%	0.0%
Education						
Non- education group	131	27.2%	6.0%	0.9%	6.7%	4.2%
Primary School	790	15.8%	12.9%	6.4%	21.7%	31.3%
Middle School	1'856	10.0%	9.9%	16.1%	33.2%	35.4%
High School	3'809	4.8%	7.3%	34.9%	33.7%	25.9%
Bachelor degree or above	4'356	0.6%	6.6%	41.7%	4.7%	3.2%

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	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
	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