

Results

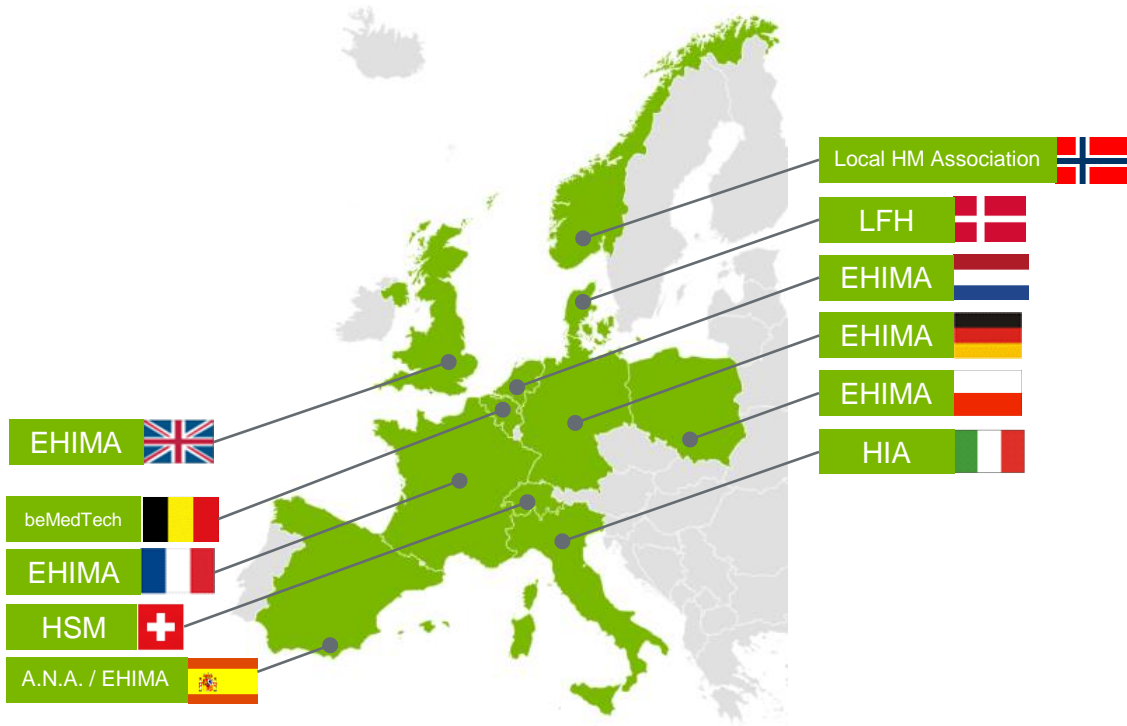
EuroTrak POL 2023

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

Summary

1. Introduction

EuroTrak POL 2023 is part of the EuroTrak / APACTrak studies:



EuroTrak POL 2023 was designed and executed by Anovum (Zurich) on behalf of EHIMA and supported by local companies.

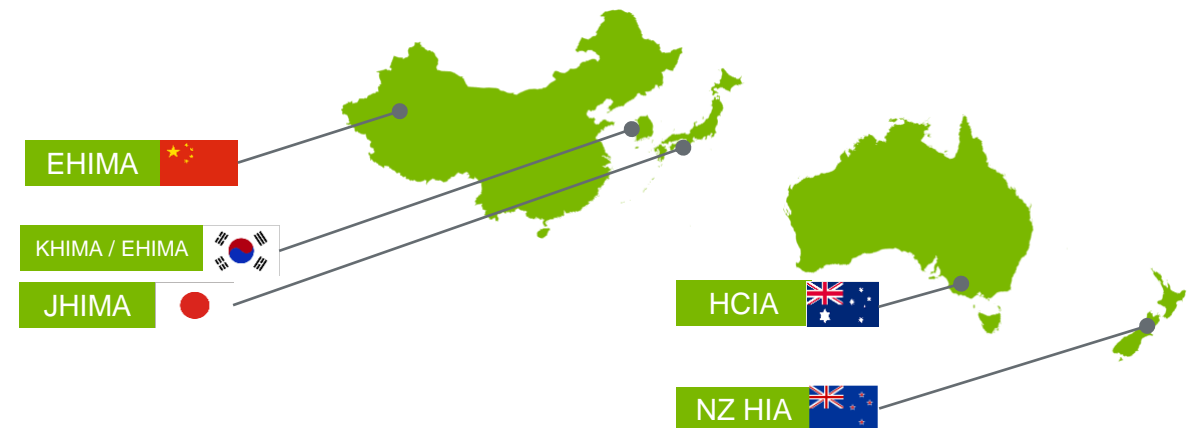
Sample sizes:

Representative sample (sample 1): n=15'162 people

Hearing impaired (sample 2): n=1'315 people

Hearing impaired non-owners (HA Non-owner): n=859 people

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



Summary

2. Market overview

- **Stated hearing loss prevalence**
 - Total: 11.8%, 18+: 13.7% (2019: 15.1 18+: 17.4%).
 - Hearing Tests: Hearing Tests: 40% had a hearing test in the last 5 years (2019: 43%), and family doctors do most tests followed by ENTs and Audiologists.

- **Hearing aid adoption rate (HA penetration)**
 - 28% of those with self-declared HL (2019: 21.4%).
 - 3.3% of total population (2019: 3.2%).
 - 58% of HA owners have binaural treatment (2019: 42%).

- **The route to the hearing aid**
 - 72% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
 - 45% got hearing aids recommended from the ENT or family doctor (drop out rate=37% / 2019: 46%).
 - 78% of the GP consultations referred to an ENT, 18% to an HA dispenser / Audiologist, and 12% to get hearing aids. 7% recommended no action.
 - 42% of ENT consultations were referred to an Audiologist, 24% recommended getting a hearing aid, and 39% recommended no action.

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

- 80% of all HA owners received some 3rd party reimbursement.
- 63% of the currently owned HAs were acquired in 2020 or later.
- The average age of the currently owned HAs is 3.8 years.
- The median age of hearing aids before replacement is 5 years.
- On average, HAs are worn 7.4 hours a day.
- BTE and RIC are the most often purchased type of HA.
- Cochlear Implants: 30% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
- 35% of HA owners use a hearing aids app, and 71% are satisfied with it.
- 13% of the HAs are (to the knowledge of the owners) equipped with Telecoil. The main usage of Telecoil is in office buildings.

- **Importance of listening situations and satisfaction with HAs**

- 75% of the hearing aid owners say their hearing aid works better than or as expected
- 76% of the HA owners are satisfied with their HAs (2019: 79%).
- The more hours worn per day, the higher the satisfaction with the HA.
- Satisfaction with newer hearing aids is higher than with older hearing aids.
- Talking at home with family members, talking on a phone and watching TV with others are the most frequent important listening situations.

- **Positive impact of HAs**

- There is a significant positive impact of HAs on different aspects: Communication effectiveness and feelings about themselves improve – but also group activities and a sense of safety.
- 97% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
- 76% 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 33% of the hearing impaired without hearing aids think that a third party would pay for any part of hearing aids.
- The main reasons for not having hearing aids are that people say that hearing aids are uncomfortable, they hear well enough, and their hearing loss is not severe enough. Additionally, affordability is new in the top 10 2023.
- 7% who own hearing aids don't use them (0 hours); 17% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**

- 64% 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 for HA owners were worsening hearing loss, ENT, GP, spouse, and an audiologist. For the non-owners, financial aspects play a crucial role (price, insurance coverage).

Detailed Results: Roadmap

1. Introduction

- Organisation of EuroTrak POL 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 EuroTrak POL 2023

Organisation

- Principal of the project EuroTrak POL 2023 is: EHIMA and local supporting companies: Amplifon Poland Sp. Z o.o., GN Hearing, Oticon Polska Sp. z o.o., Sivantos Sp. z o.o., Sonova Polska Sp. z o.o, Starkey Laboratories Poland Sp. z o.o., Widex Polska Sp z. o.o.
- Anovum Zurich developed the concept of EuroTrak POL, 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.

Use of the data

- The principal 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 – EuroTrak POL/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. 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=15'162** 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= 859** hearing impaired non-owners and **n=456** hearing aid owners



2. Market overview

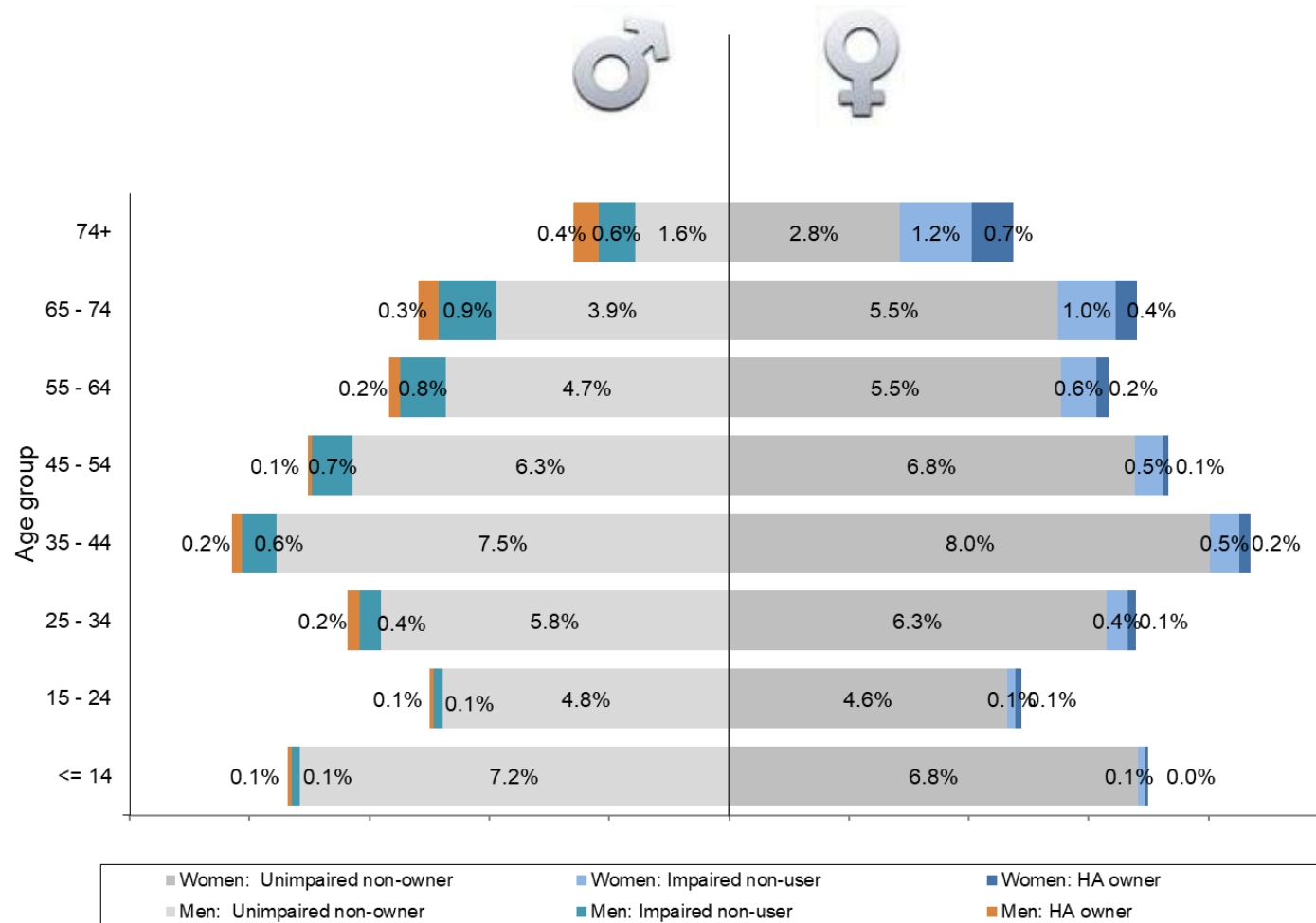




Prevalence of hearing loss and adoption rate



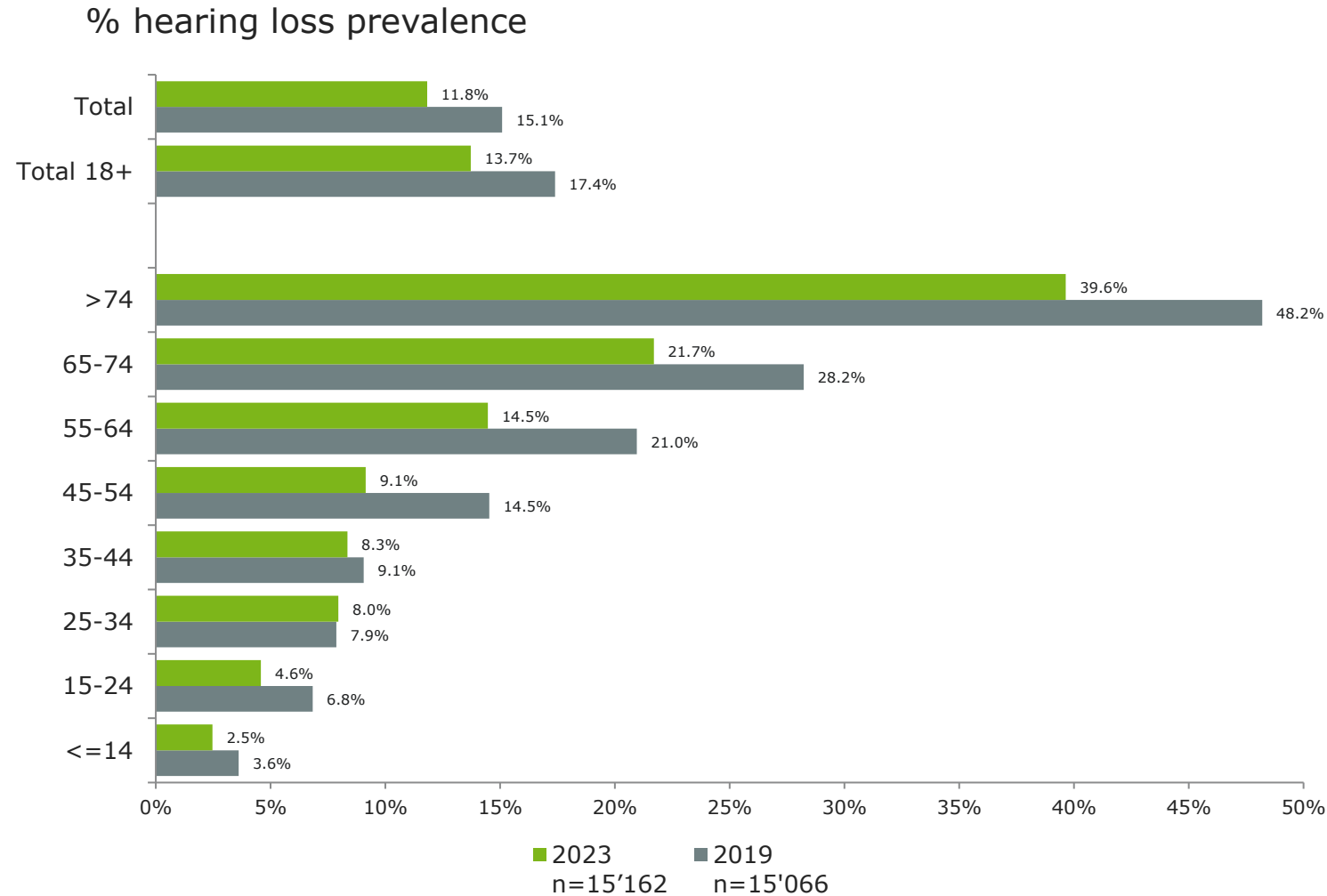
Hearing loss and hearing instrument ownership by gender/age



n=15'162

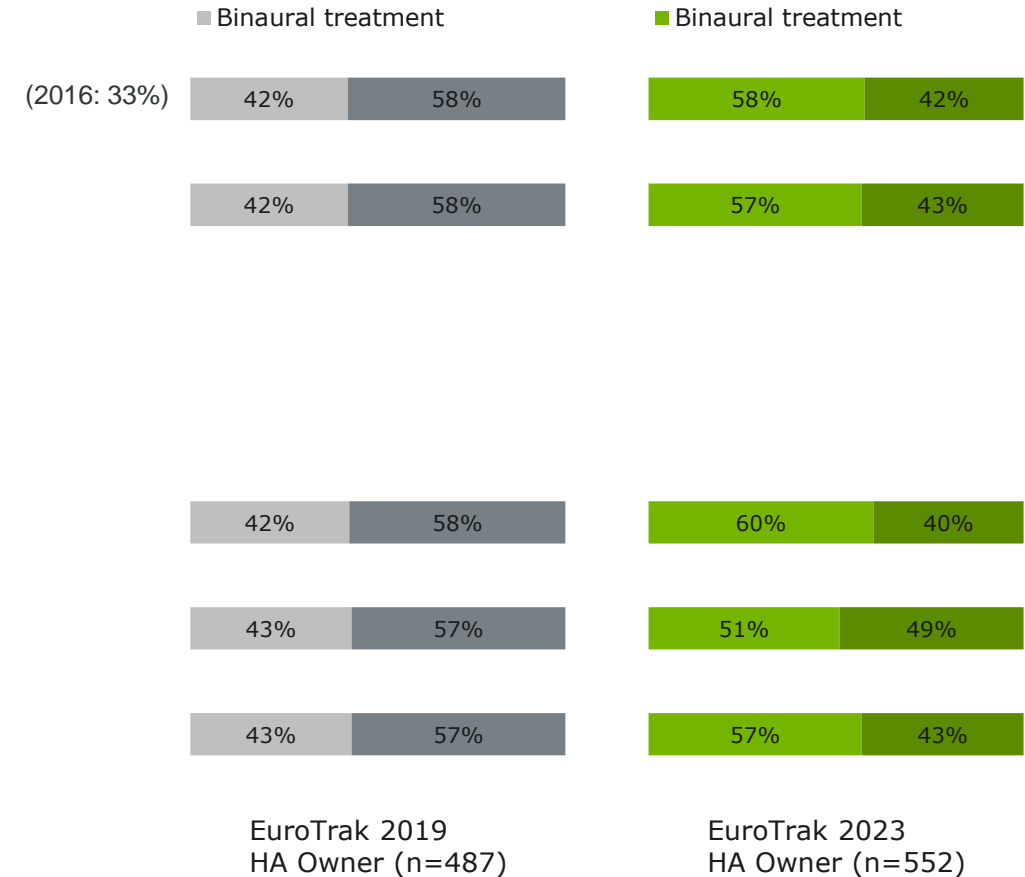
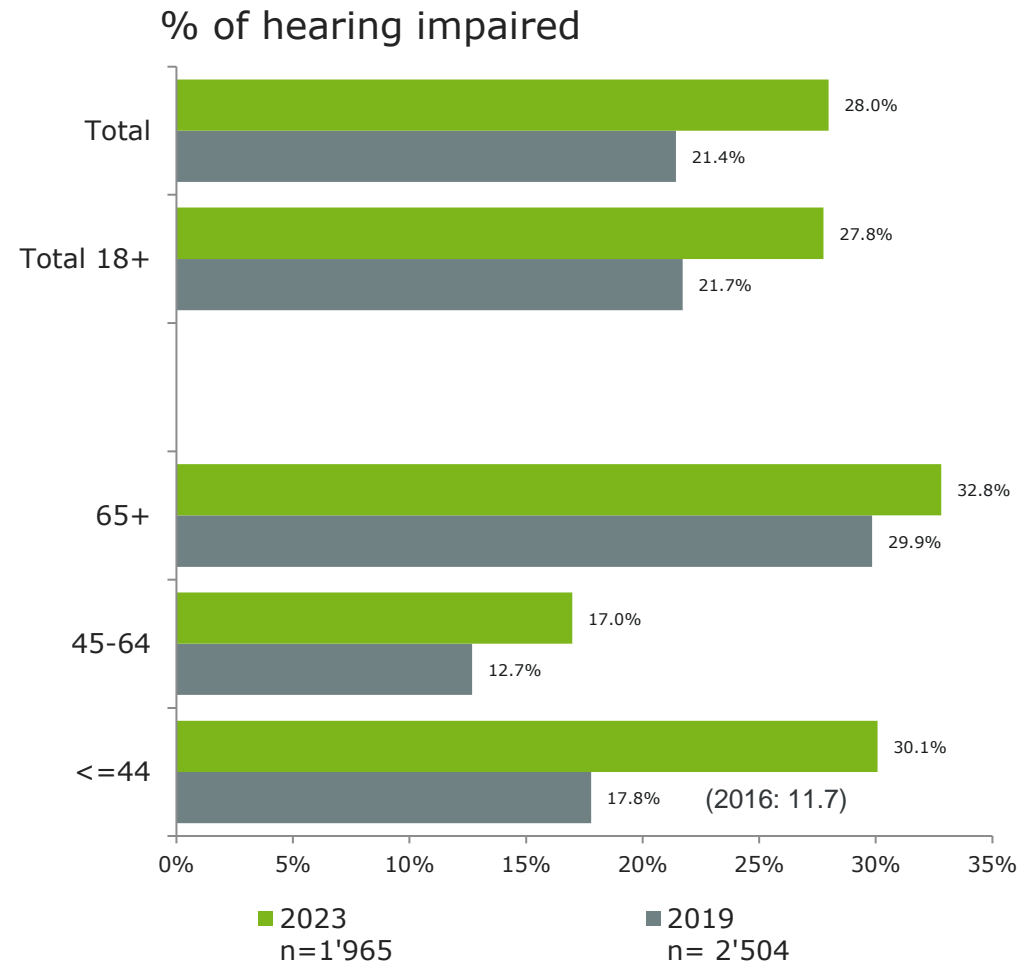
Hearing loss prevalence POL

Self declared hearing loss



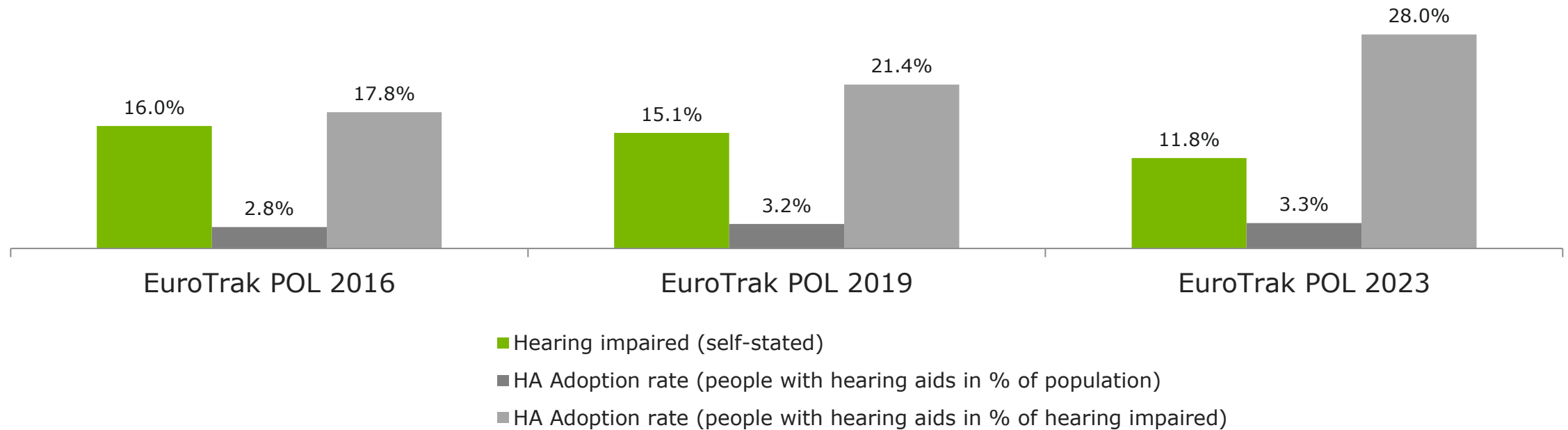


Hearing aid adoption rate: 28% of the hearing impaired have hearing aid(s), and 58% of them have binaural treatment (2019:42%)



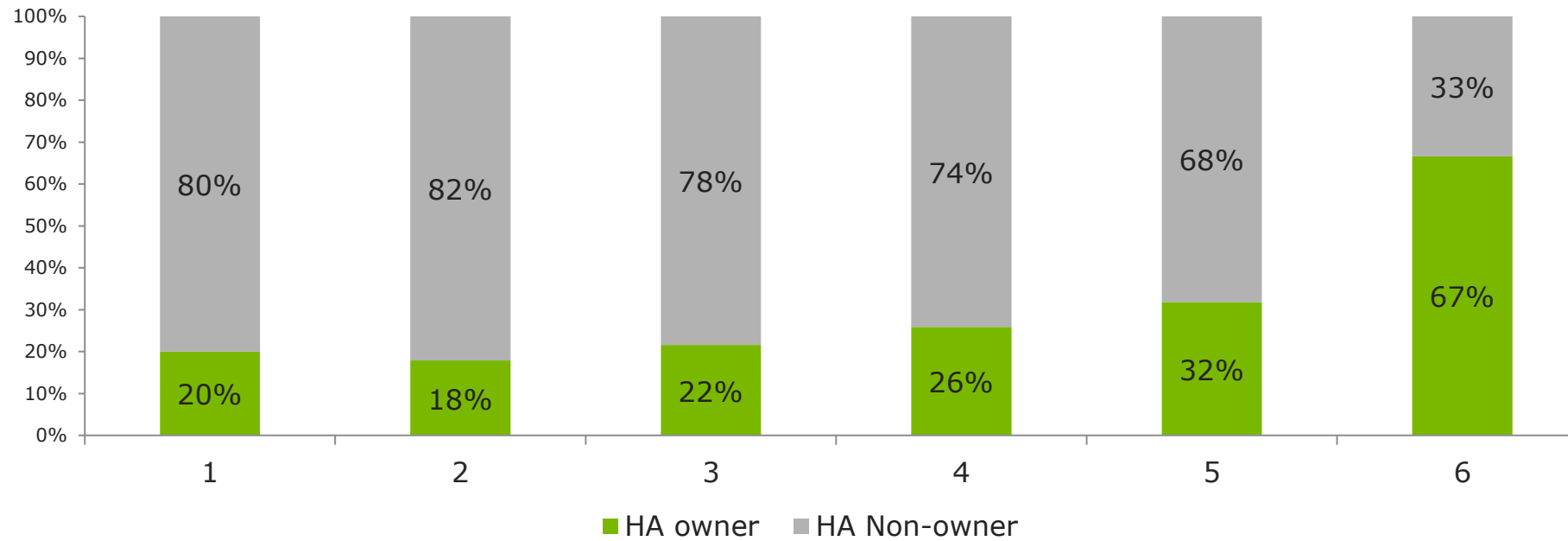


Overview hearing loss prevalence and hearing aid adoption





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



Hearing loss sextile-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=859





Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	HA Non-owner n=859	HA Owner n=456	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	36%	28%	25%
Bilateral loss	64%	72%	33%
Perceived loss			
Mild	44%	11%	9%
Moderate	40%	39%	28%
Severe	13%	35%	55%*
Profound	3%	15%	

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





Hearing tests and where hearing is tested

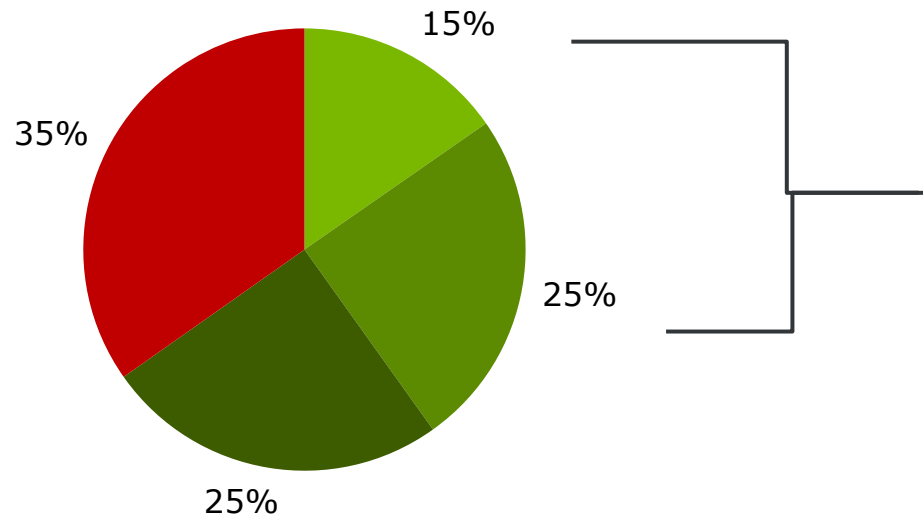




Hearing Tests: 40% had a hearing test in the last 5 years (2019: 43%), most tests done by ENT's

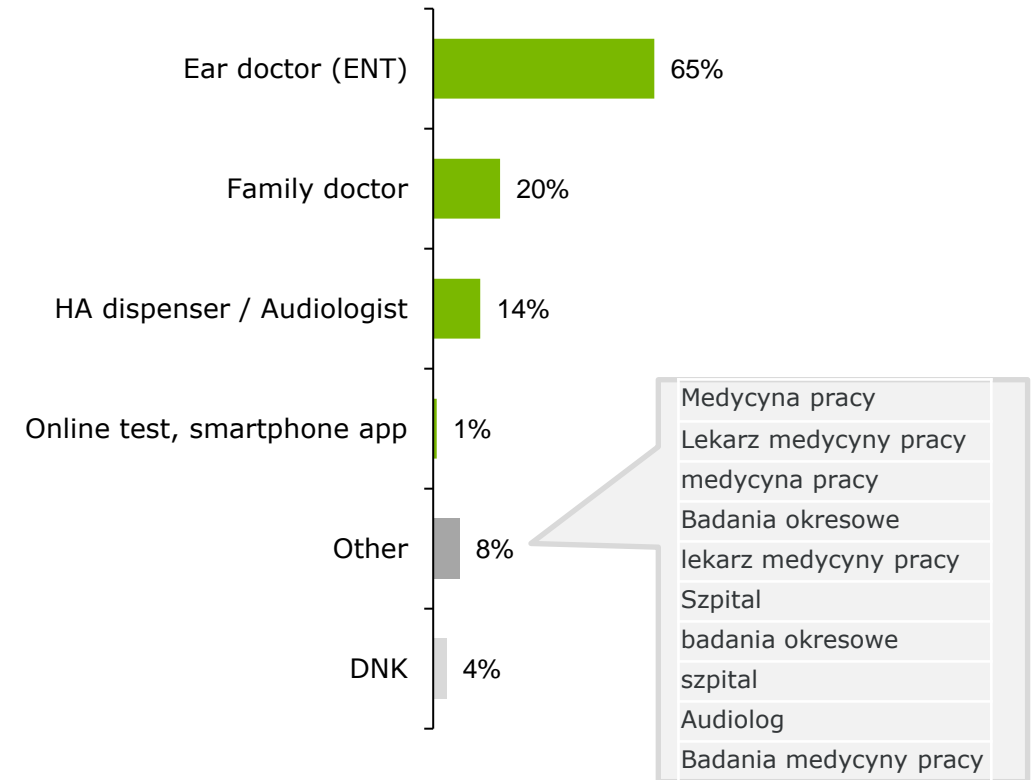
Have you ever taken a hearing test?

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



n=10'976

Where/how was your hearing tested?

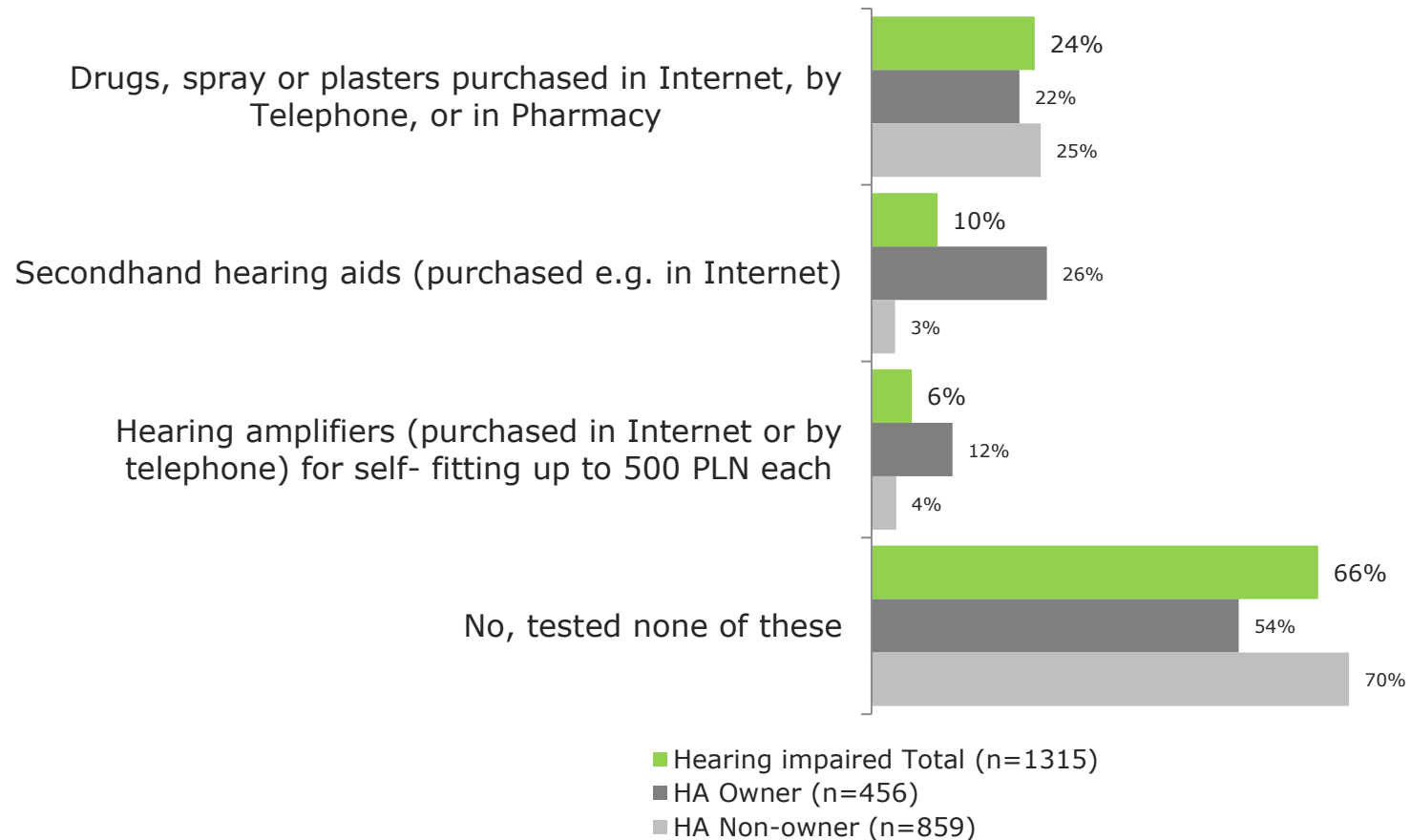


n=4'519



1 out of 4 hearing impaired has already tried drugs, spray or plasters to improve hearing

Did you ever test any of the following to improve your hearing?*



*Poland specific question



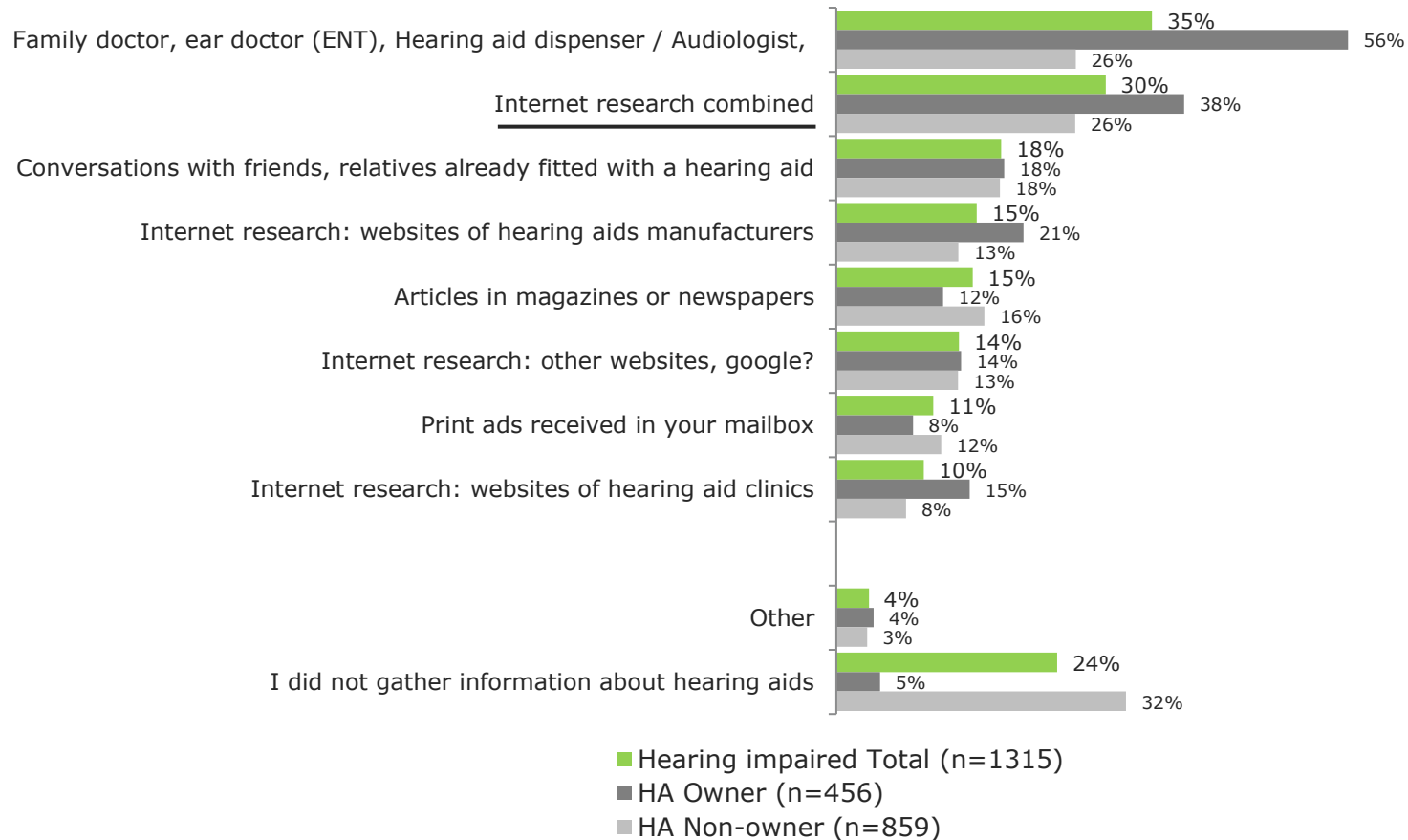


The route to the hearing aid: Sources of information and drop-out rates



Doctors and HCPs are the most important sources of information and therefore the major gatekeepers – followed by internet research and other people with hearing aids

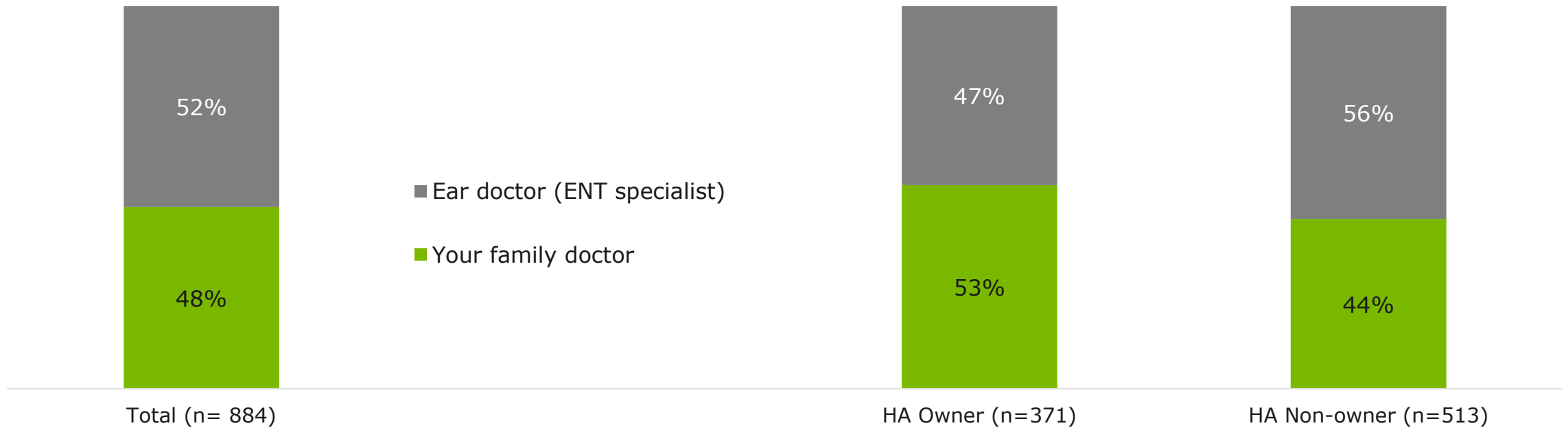
Where did you gather information about hearing aids?





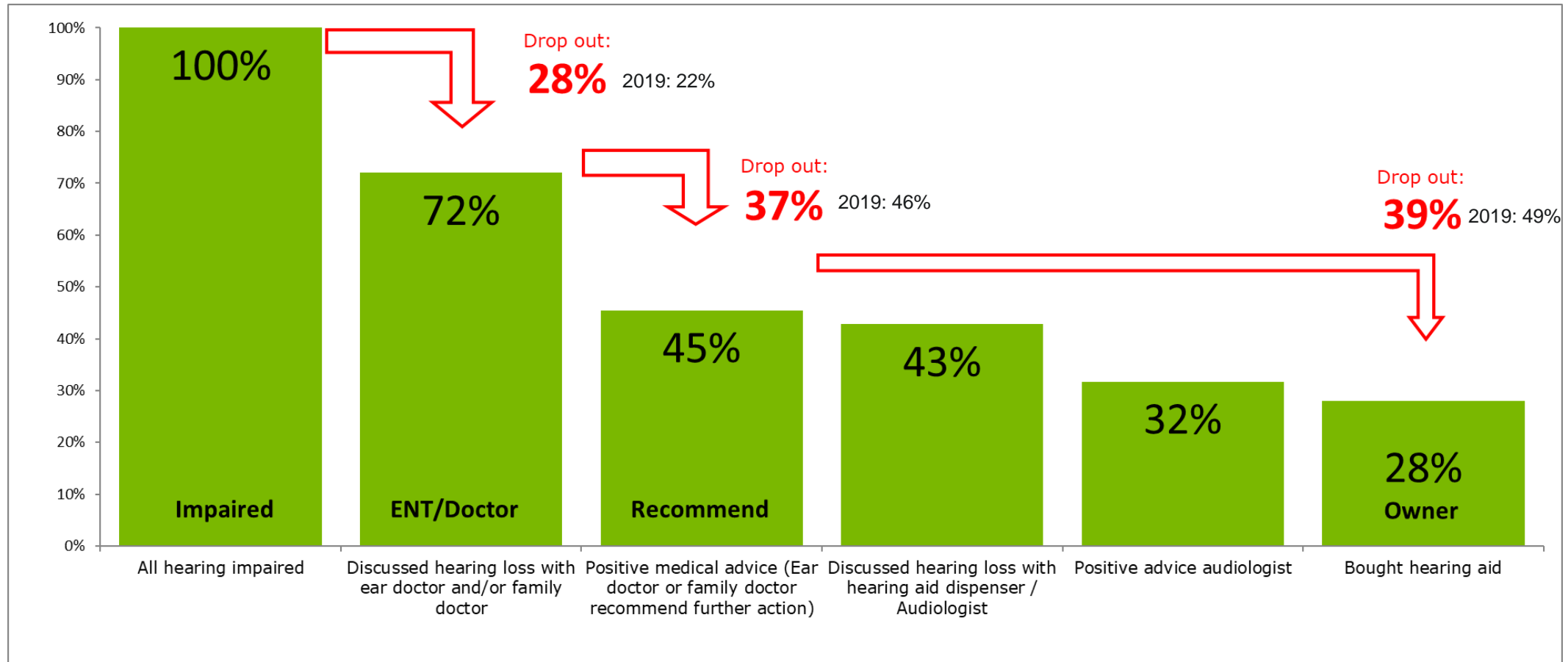
Of those who discussed the hearing loss with a doctor, 52% talked to an ear doctor (ENT) first, and 48% spoke to a GP/family doctor first

Those who discussed hearing loss with family doctor and/or ENT:
 Who was the doctor you discussed your hearing loss with for the **first time** – your family doctor or the Ear, Nose and Throat specialist (ENT)?





The route to the hearing aid



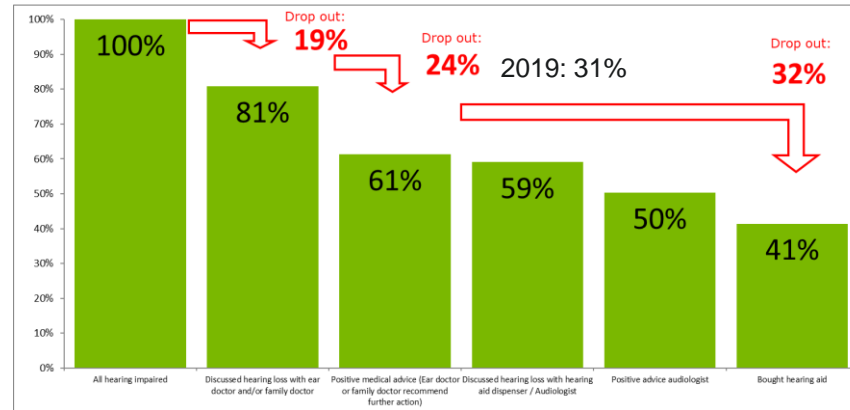
n=1315



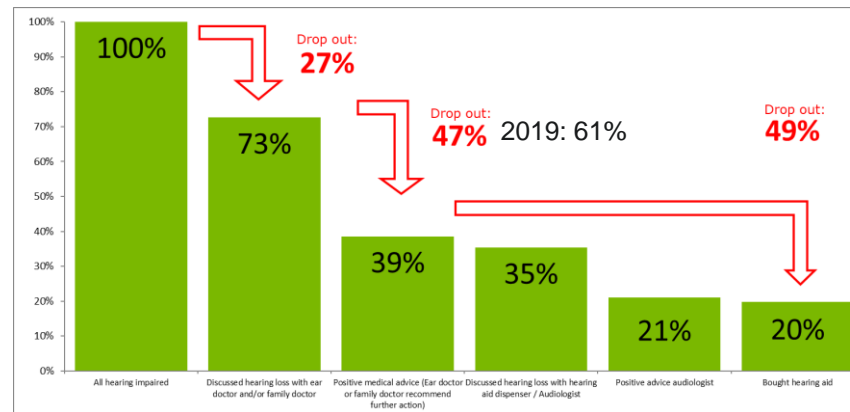


Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*



Low 50% hearing loss*



n=1315

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

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

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

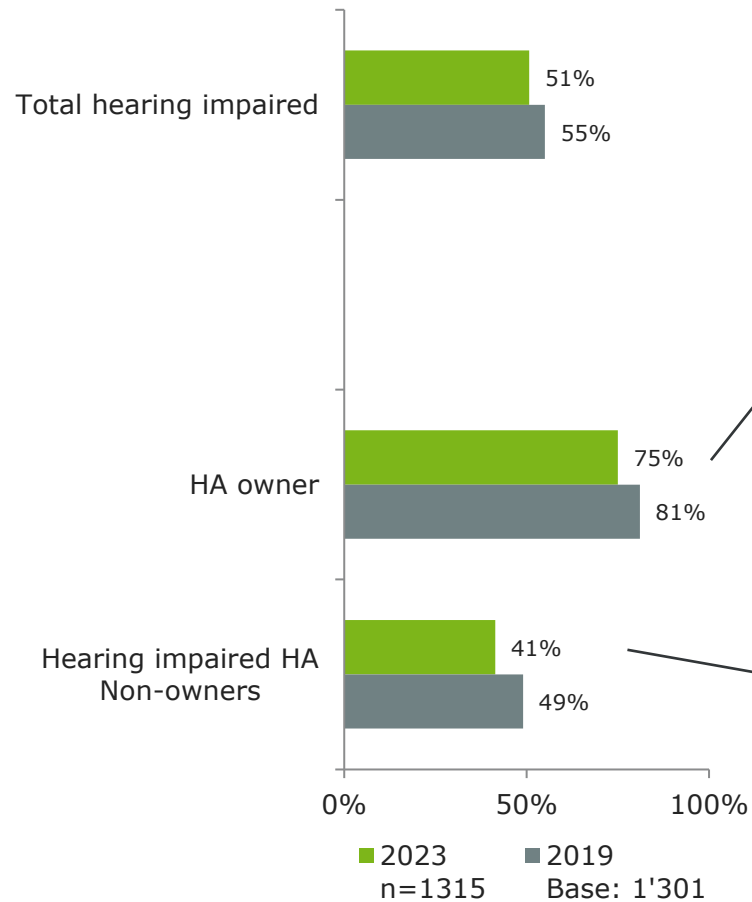




The route to the hearing aid: GP/Family doctor

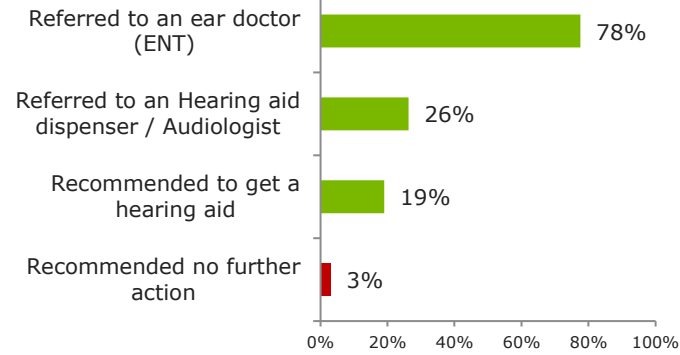
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

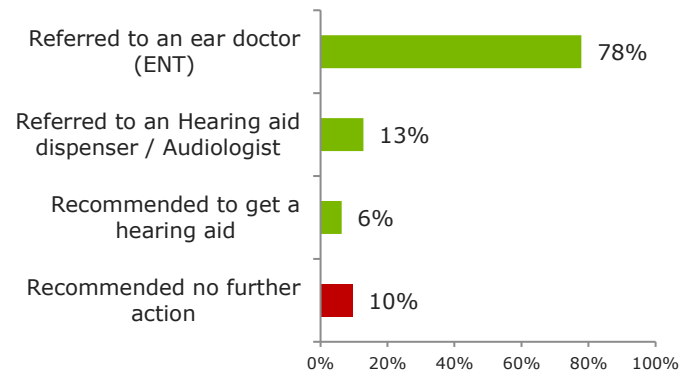


What did he/she recommend ?

HA Owner (n=429)



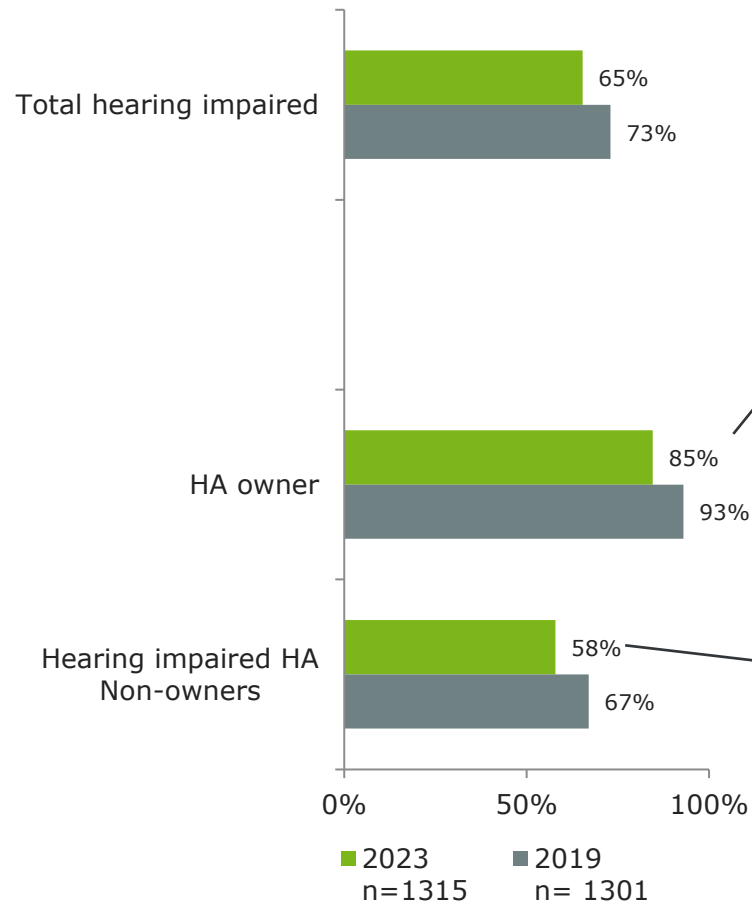
Impaired HA Non-owner (n=823)



The route to the hearing aid: ENT

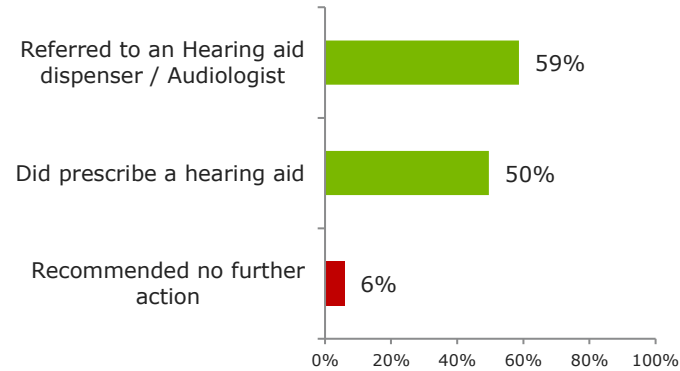
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

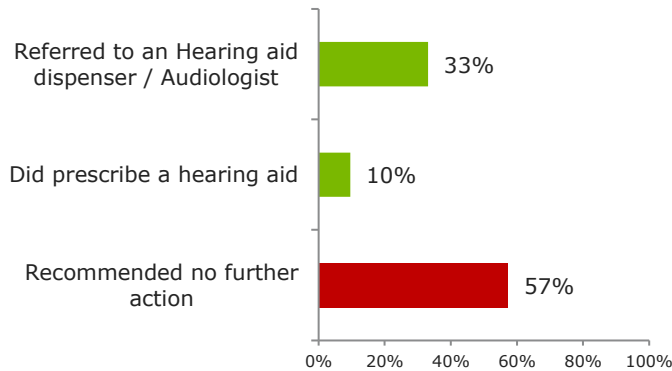


What did he/she recommend ?

HA Owner (n=319)



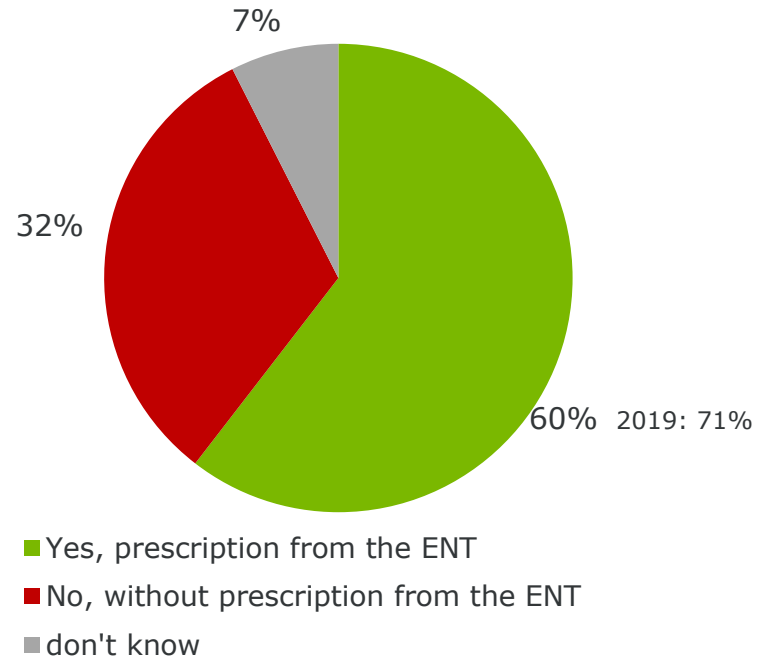
Impaired HA Non-owner (n=333)





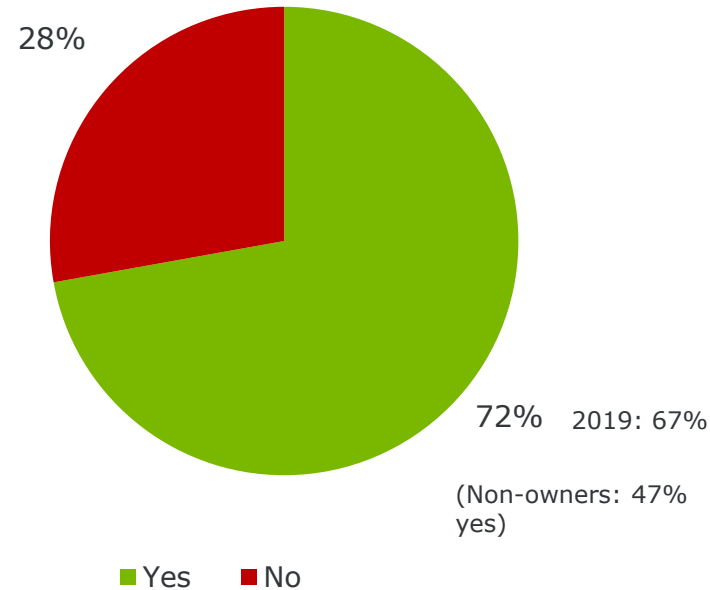
60% have purchased their hearing aid with prescription from the ENT

Have you purchased your hearing aids with a prescription from your ear doctor (ENT)?*

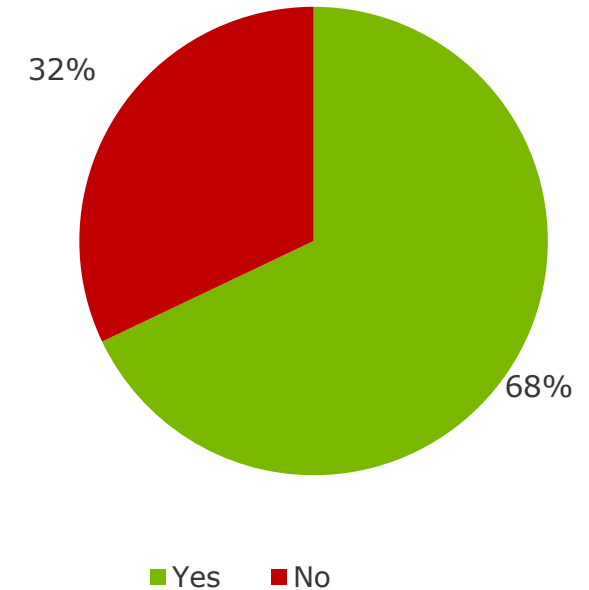


HA-owner, n=456

Do you know that hearing aids can also be purchased without a prescription from the ear doctor (ENT)? *



Do you assume that hearing aids are more affordable (cheaper) if you receive reimbursement with prescription from the ear doctor (ENT)? *



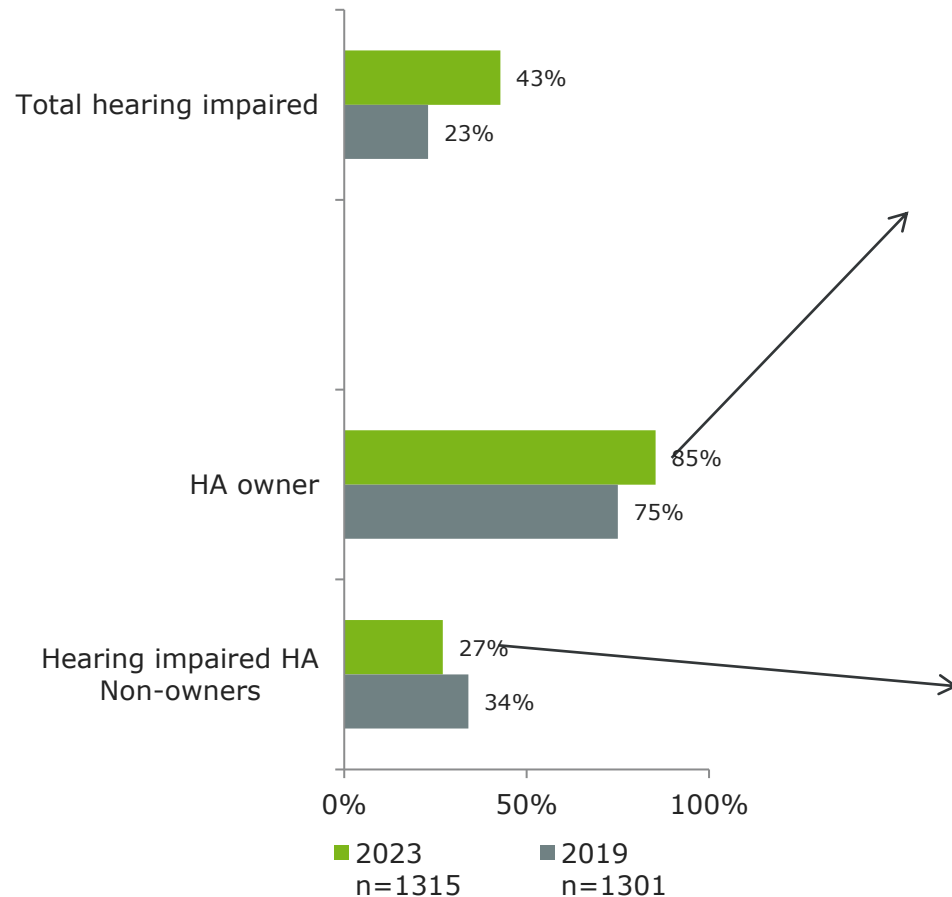
***Poland specific question**



The route to the hearing aid: Audiologist

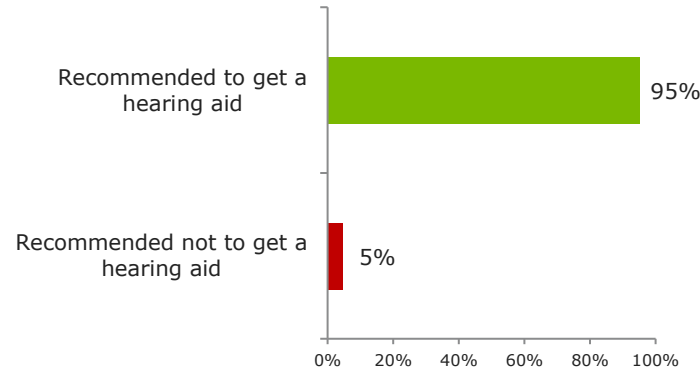
Have you ever discussed your hearing problem with a HA dispenser / Audiologist?

% Discussed with HA dispenser/ Audiologist

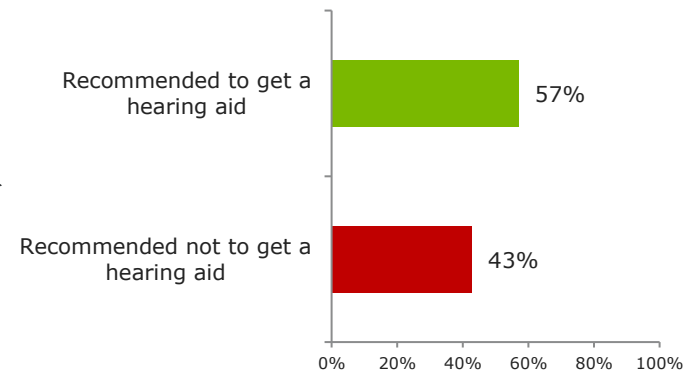


What did he/she recommend ?

HA Owner (n=365)

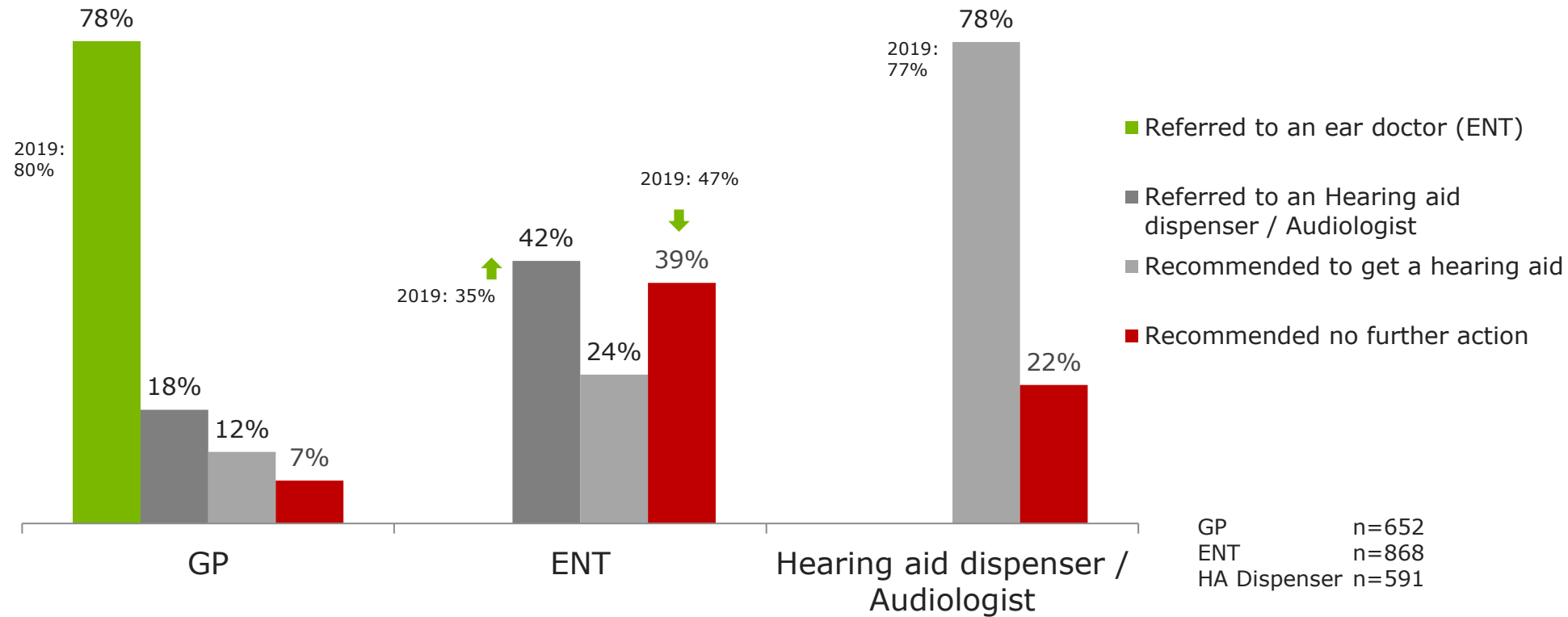


Impaired HA Non-owner (n=226)





Recommendations by profession



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



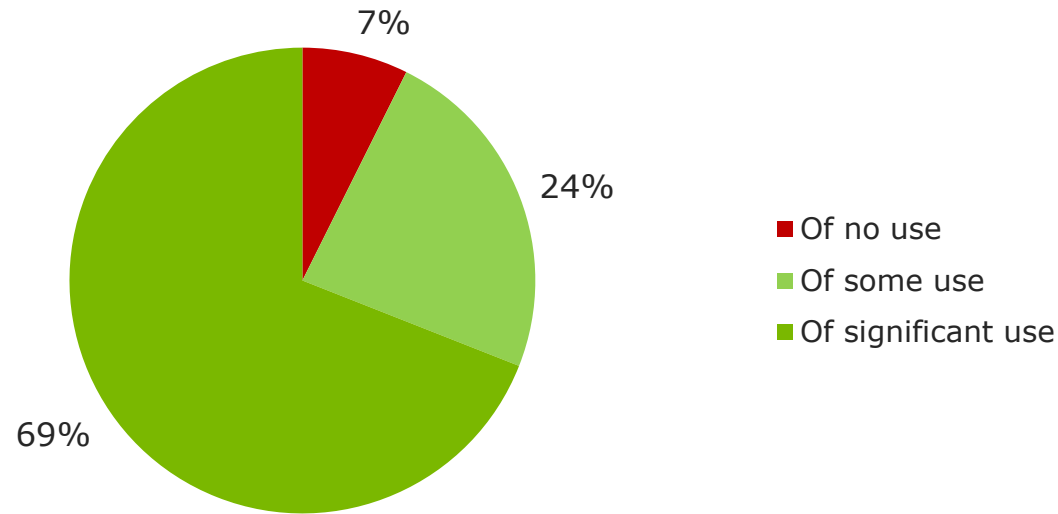


Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities



Work competitiveness: 93% of the working hearing aid owners state that their hearing aid(s) are useful on their job

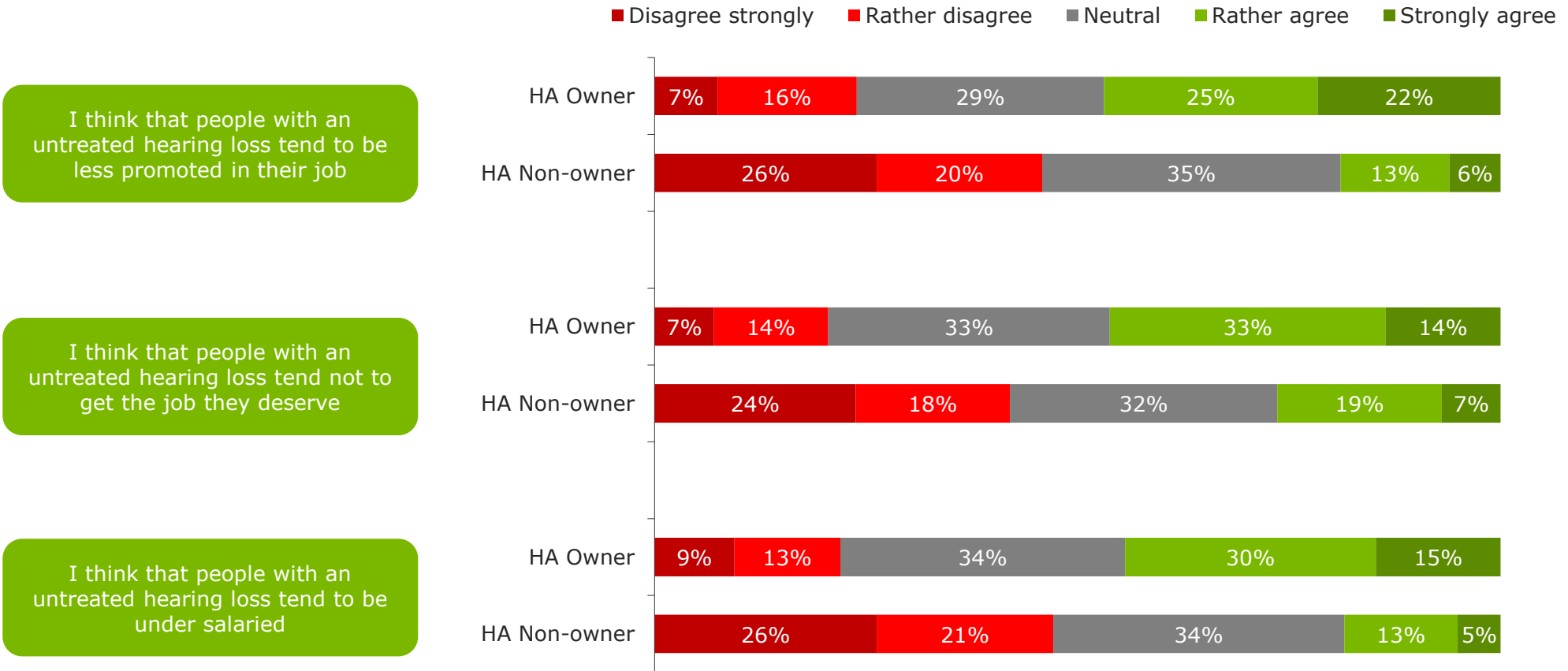
How useful are your hearing aids on your job?



Working HA Owner n=139



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=295 / HA Non-owner n=576





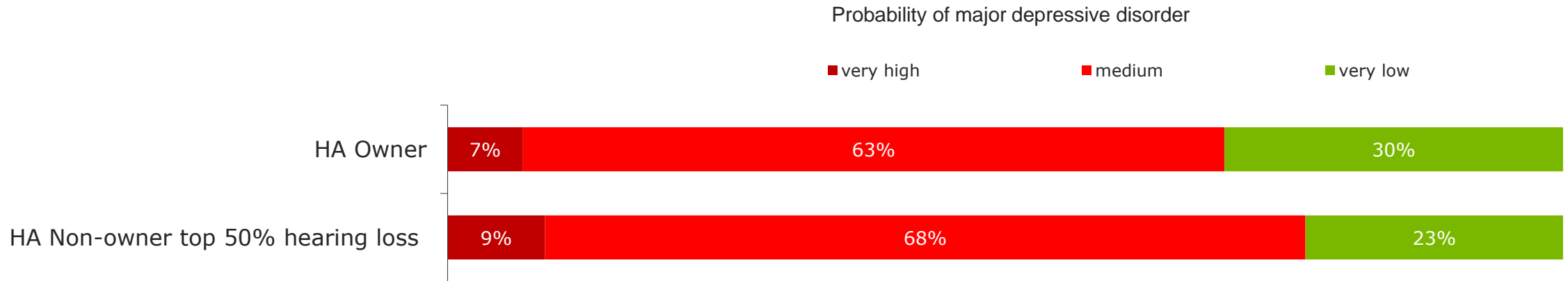
General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*)

Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

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



HA owner n=318 / HA Non-owner top 50% hearing loss n=194

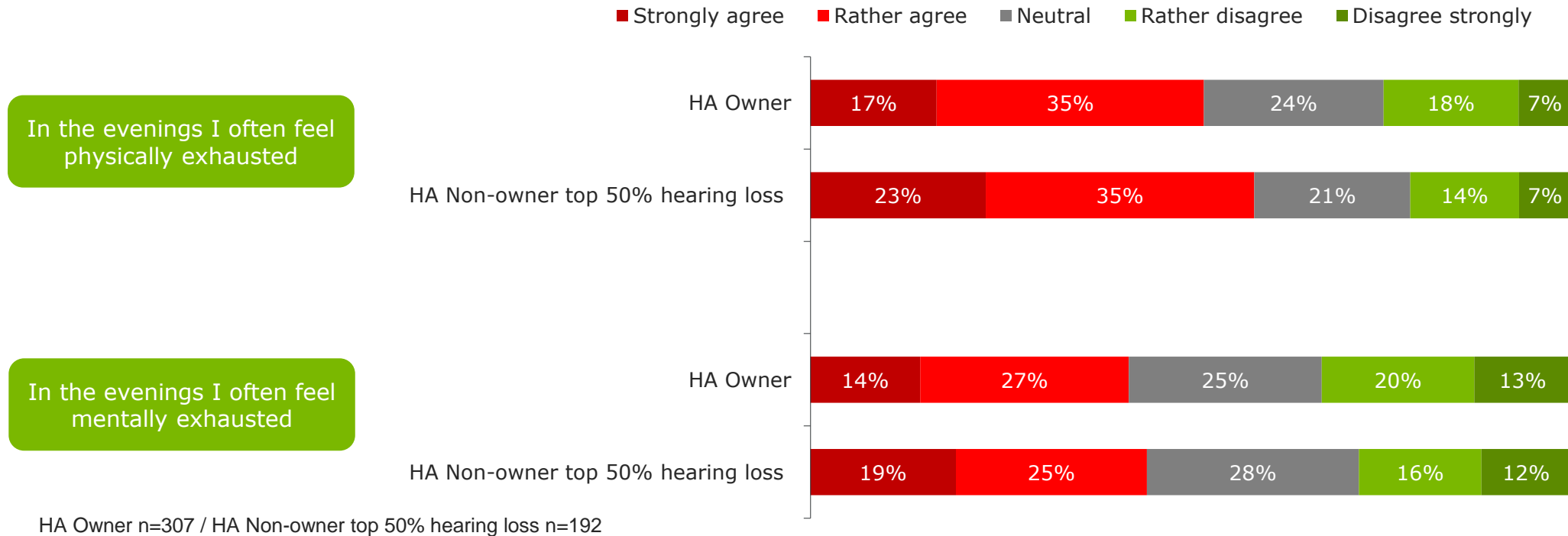
*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- Number of ears impaired (one or two)
 - Stated hearing loss (Mild to Profound)
 - Scores on 6 APHAB-EC - like questions (Scaled 1-5)
 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).





General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top50% hearing loss group*), hearing aid owners feel less exhausted in the evenings



*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:

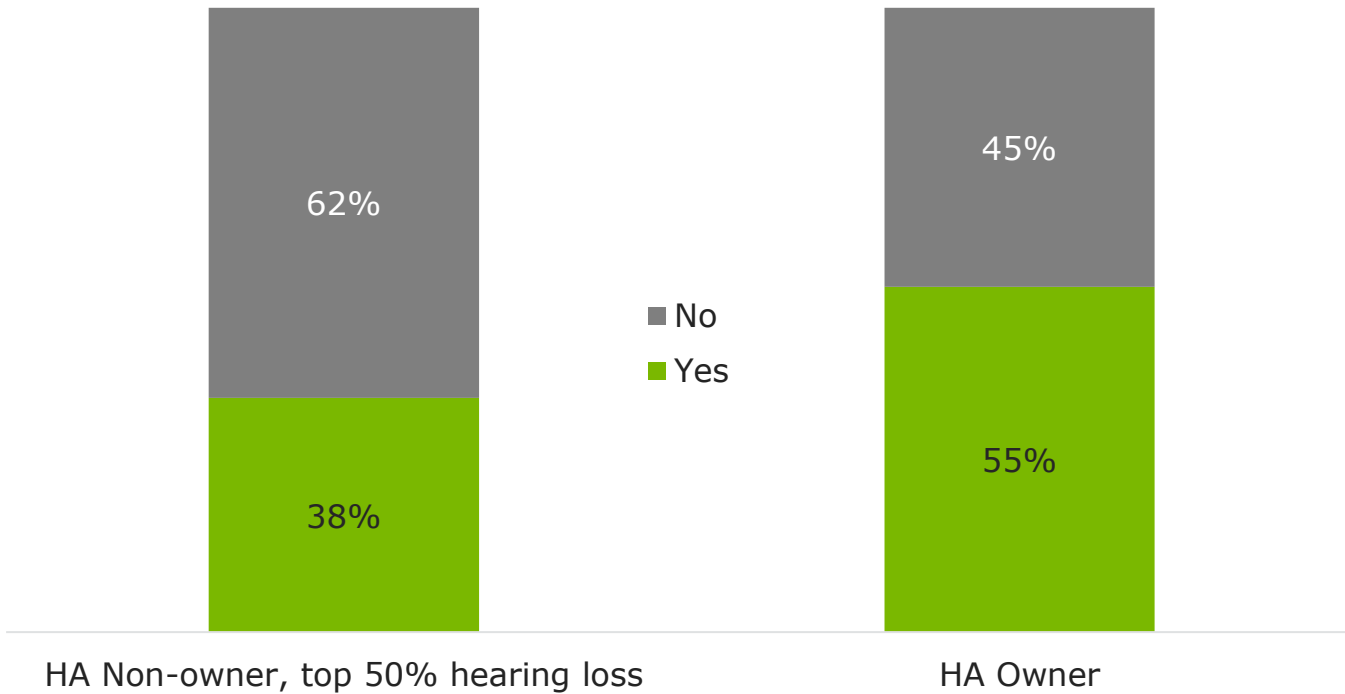
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC - like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ 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

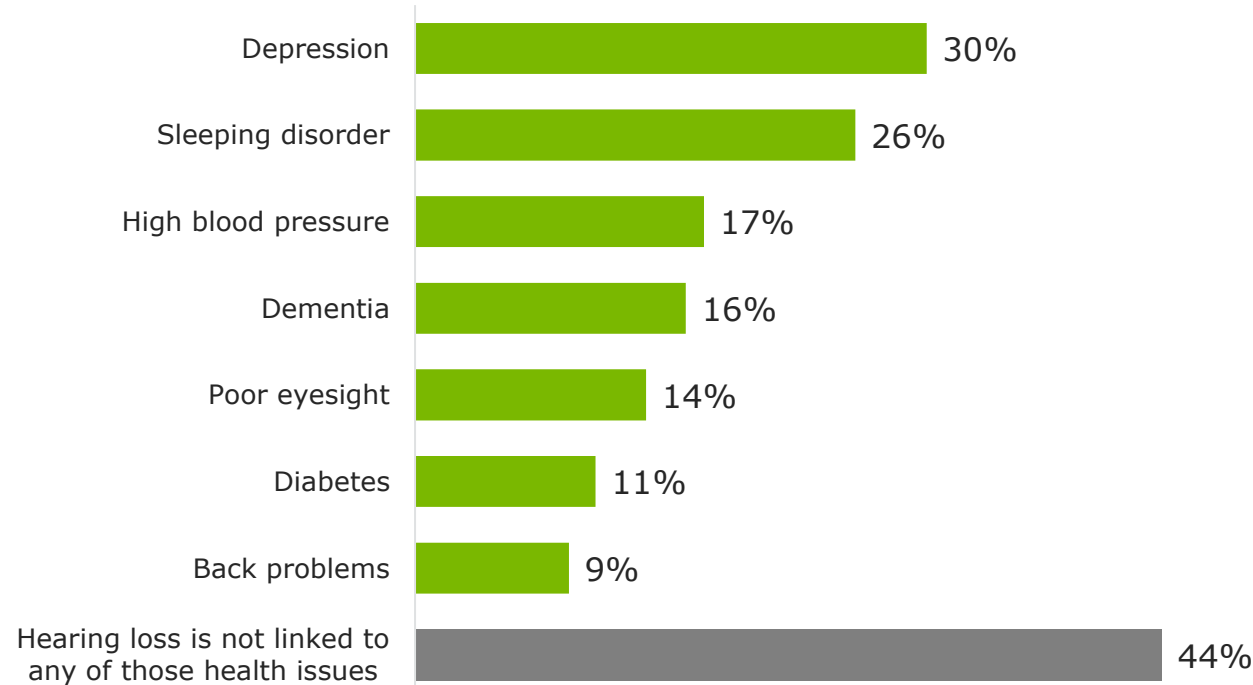
Are you generally satisfied with the quality of your sleep?



HA Non-owner top 50% hearing loss n=194 / HA Owner n=318

30% 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=1315



3. Analysis of hearing aid owners



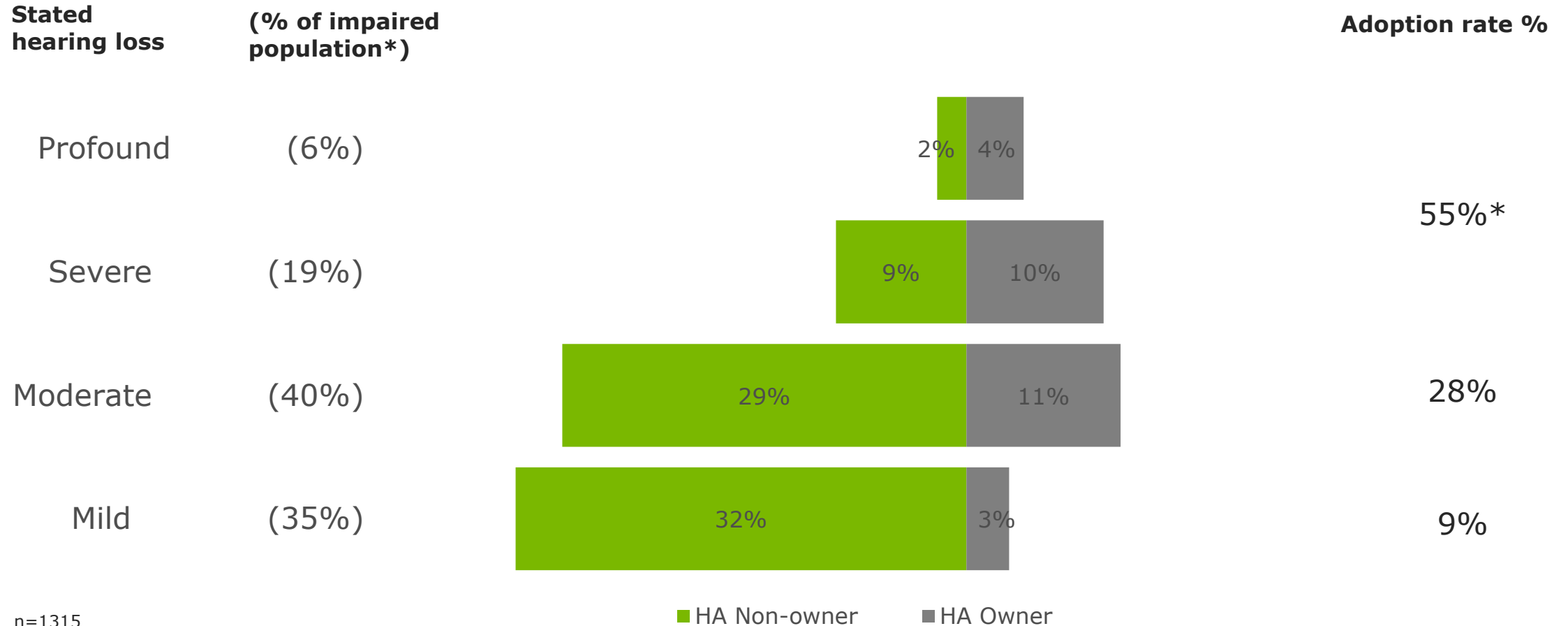


Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage





Low adoption rates within mild hearing loss



n=1315

Sums can differ from 100% due to rounding

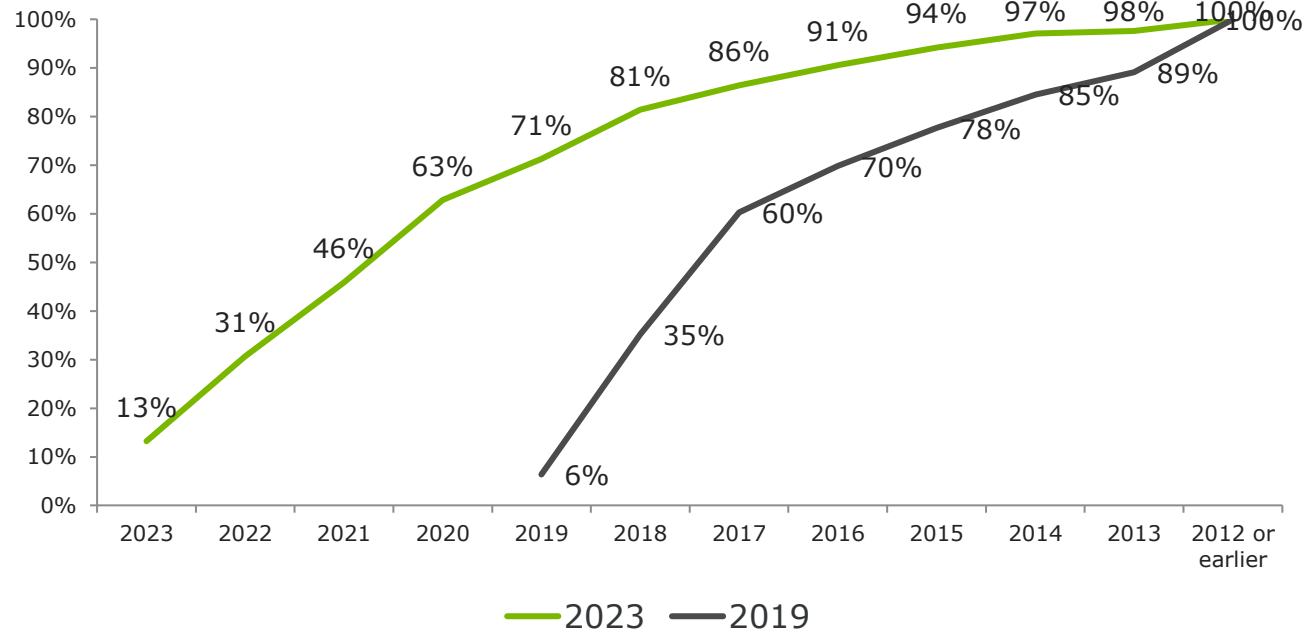
* combined "severe" and "profound" because n is too small





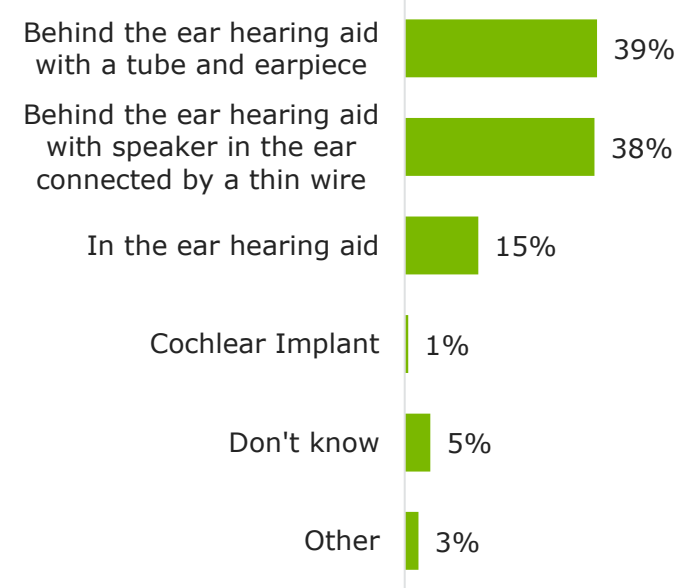
63% of the currently owned HAs were acquired in 2020 or later BTE and RIC are the most often purchased type of HA

Year of purchase



Age of currently owned HAs (Mean):
2023: 3.8 years
2019: 3.3 years

Type of HA

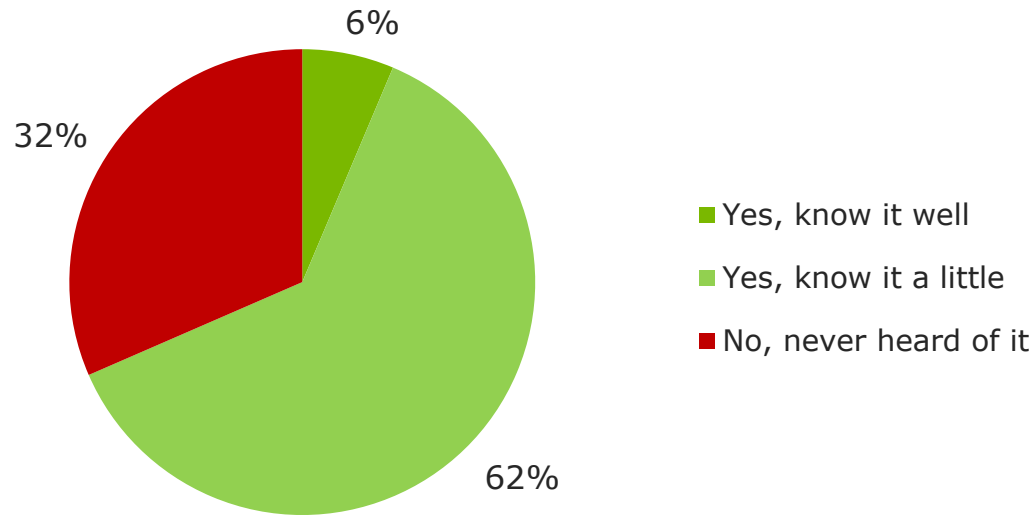


HA Owner n=456



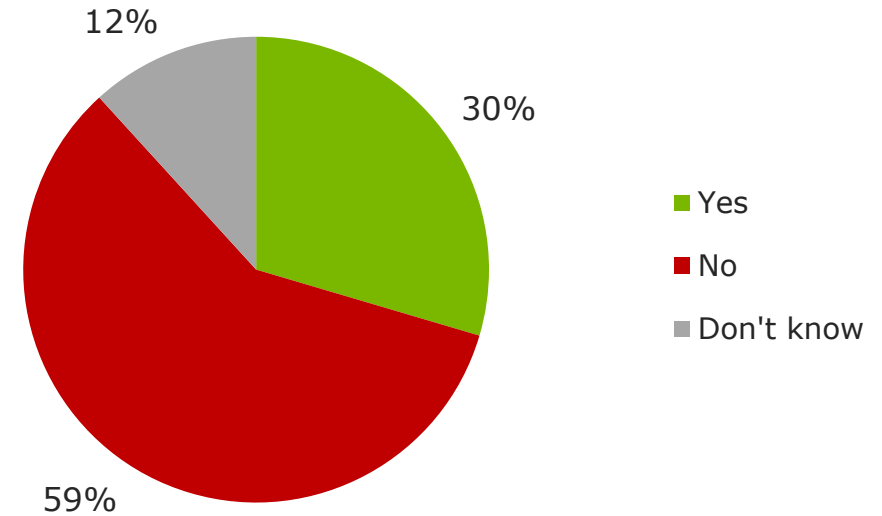
68% of the population in POL have never heard of Cochlear Implants. 30% of the HA owners with severe/profound HL have been informed about CIs by a medical professional

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



n=4'055

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

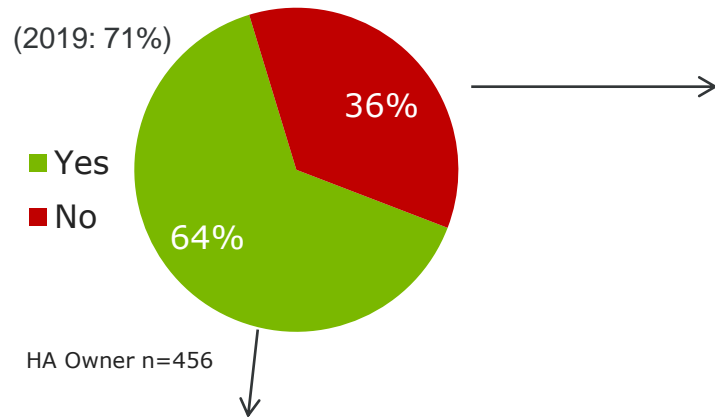


n=215 (HA Owner with severe/profound HL)

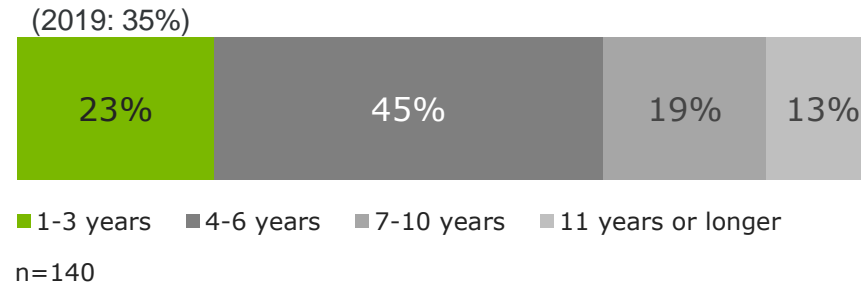


Hearing aids are used for five years before they are replaced. Mostly below three years pass between becoming aware of the hearing loss and purchasing hearing aids

Current HAs = first HAs?



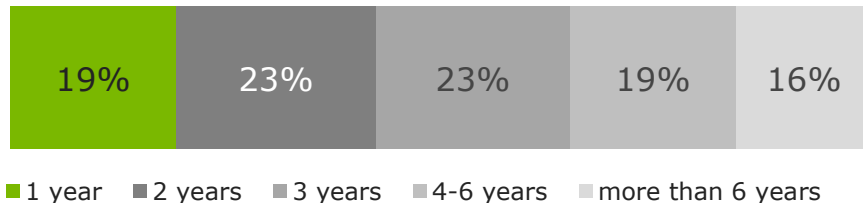
How many years did you own your previous HAs?



Age of HA before it has been replaced:
 2023: 5 years (median)
 2019: 5 years (median)

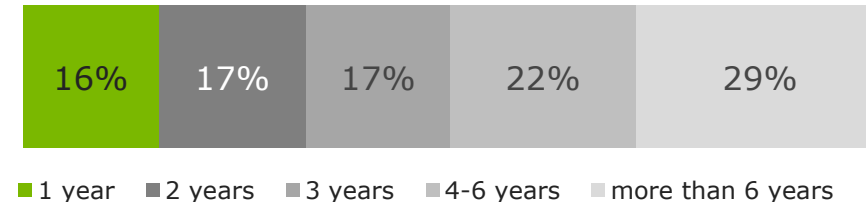
HA Owner (1st HA):

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:

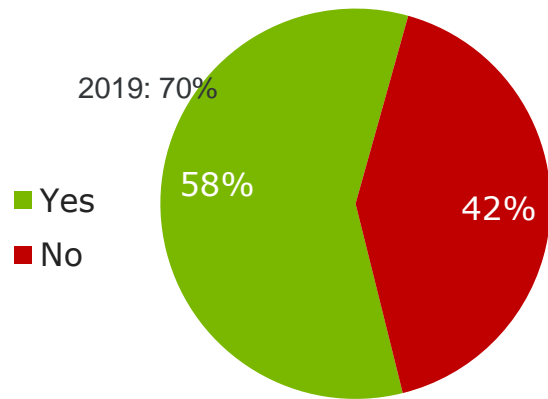
How many years had passed since you became aware of your hearing loss?





58% of all HA owners think they should have gotten their HAs sooner! The main reason is missing out on emotional health and social life

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=274

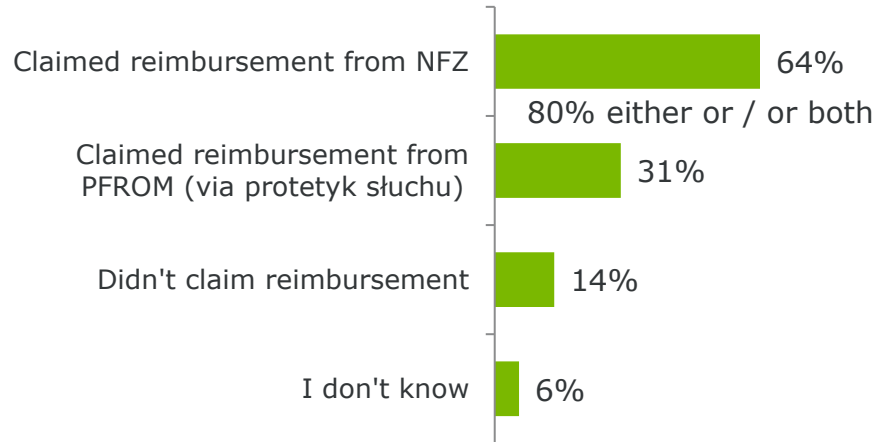




80% claimed some 3rd party reimbursement. Only 33% of non-owners know whether the government/insurance would pay something

HA Owner*:

Have you benefited from funding for hearing aids from NFZ and / or PFRON? (multiple answers possible)

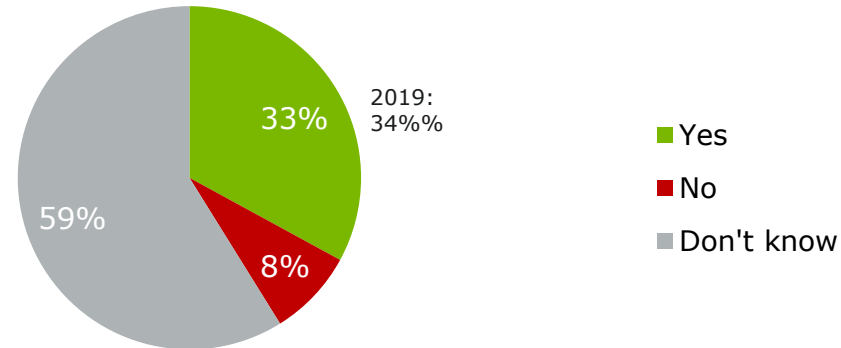


*Poland specific question

HA Owner n=456

HA Non-owner:

Based on your current knowledge, would any part or all of your hearing aid(s) be paid for by a third party? (Insurance, Government, ...)



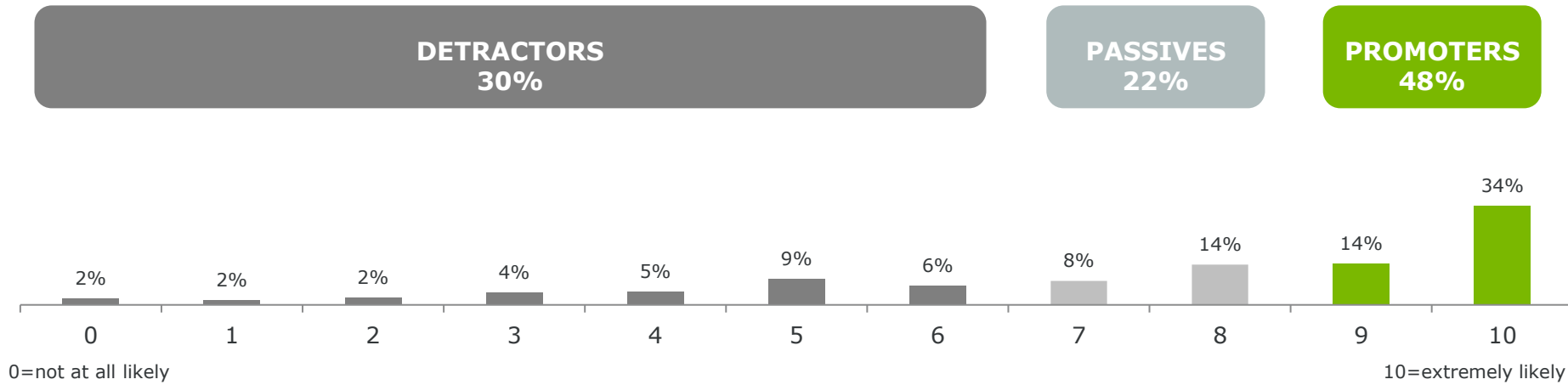
HA Non-owner n=859





Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 18

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



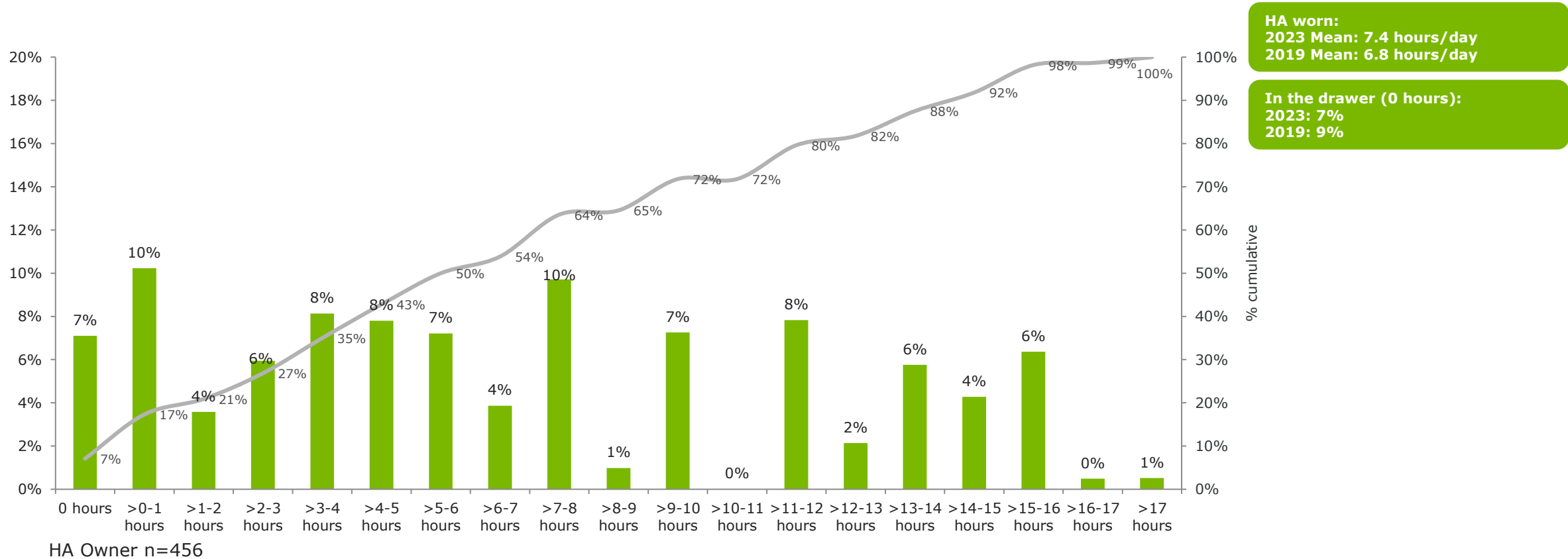
NPS = PROMOTERS – DETRACTORS = 18 (exact figure rounded) 2019: 10%

HA Owner n=456



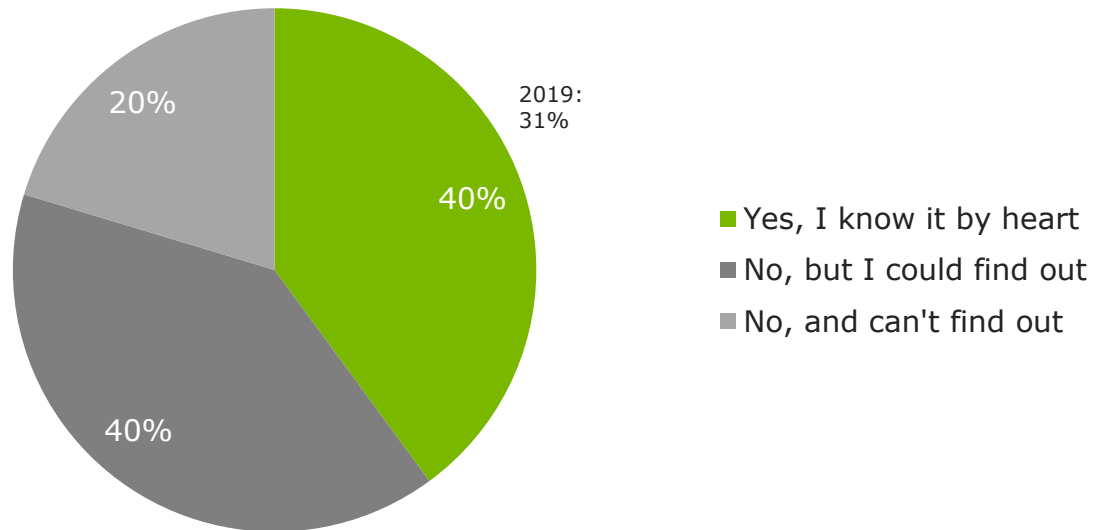
On average, HAs are worn 7.4 hours a day

How many hours a day are HA worn?



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=456



35% of the HA owners use a hearing aid app, and 71% 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)

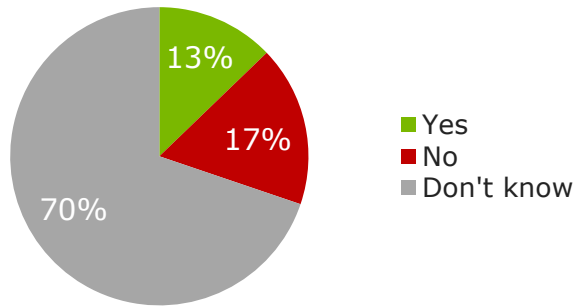


IF APPS USED (n=168):
Overall, how satisfied with the performance of your apps?



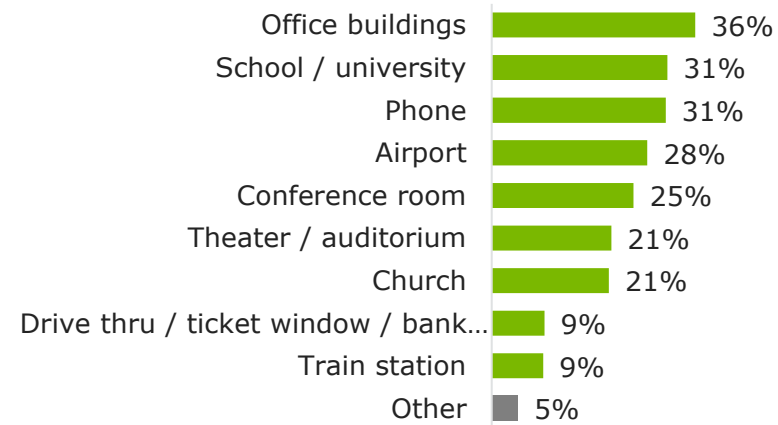
13% of the HAs are (to the knowledge of the owners) equipped with Telecoil — the main usage of Telecoil is in office buildings

Are your hearing aids equipped with Telecoil?



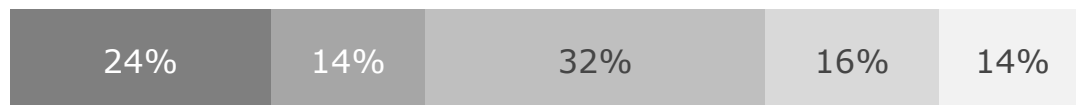
HA Owner n=456

Where do you use your telecoil to improve your hearing?



HA Owner (use Telecoil), n=56

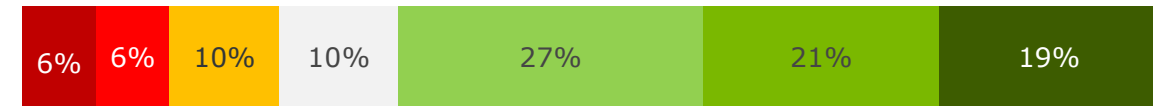
How often do you use the telecoil to improve your hearing?



■ Never ■ Rarely ■ Occasionally ■ Often ■ Very often

HA Owner (equipped with Telecoil), n=56

How satisfied are you with the telecoil option?



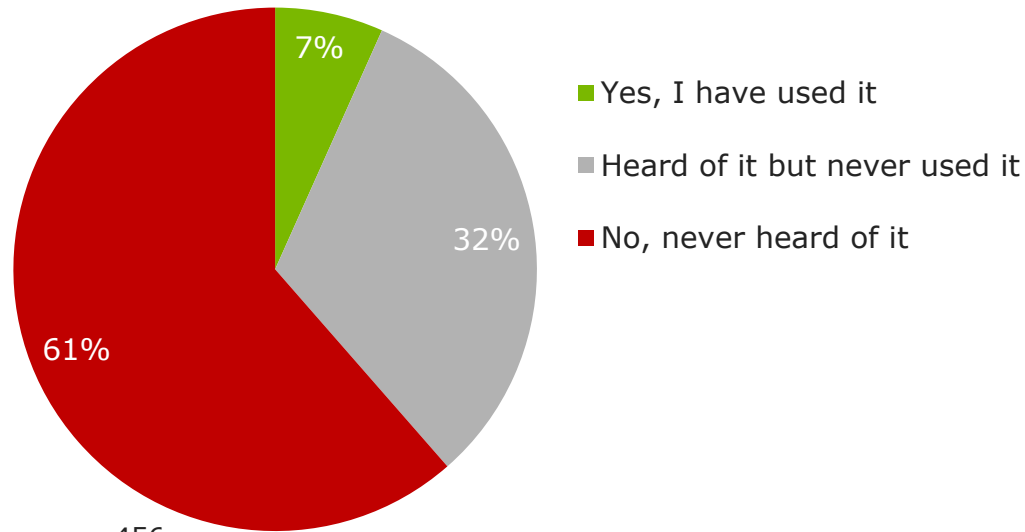
■ Very dissatisfied ■ Dissatisfied ■ Somewhat Dissatisfied ■ Neutral ■ Somewhat Satisfied ■ Satisfied ■ Very Satisfied

HA Owner (use Telecoil), n=44

7% of the HA owners have already used remote fitting, 32% have at least heard of it, and 61% 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

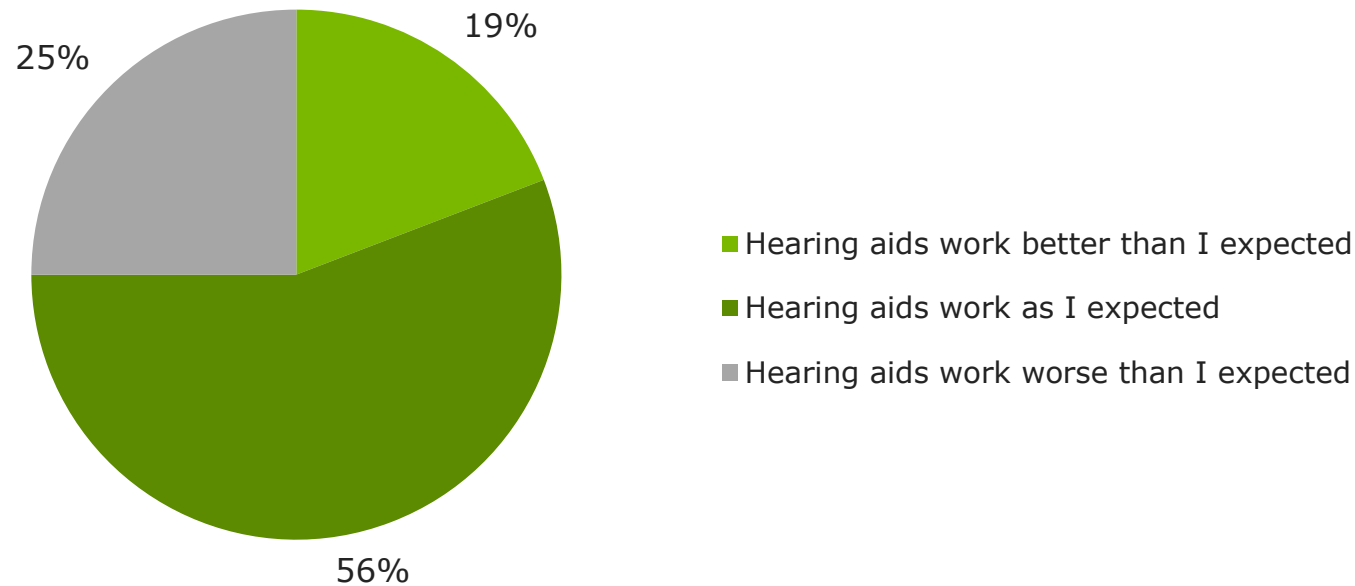


Satisfaction with hearing aids and drivers



75% (2019: 70%) of hearing aid owners say their hearing aid works better than or as expected

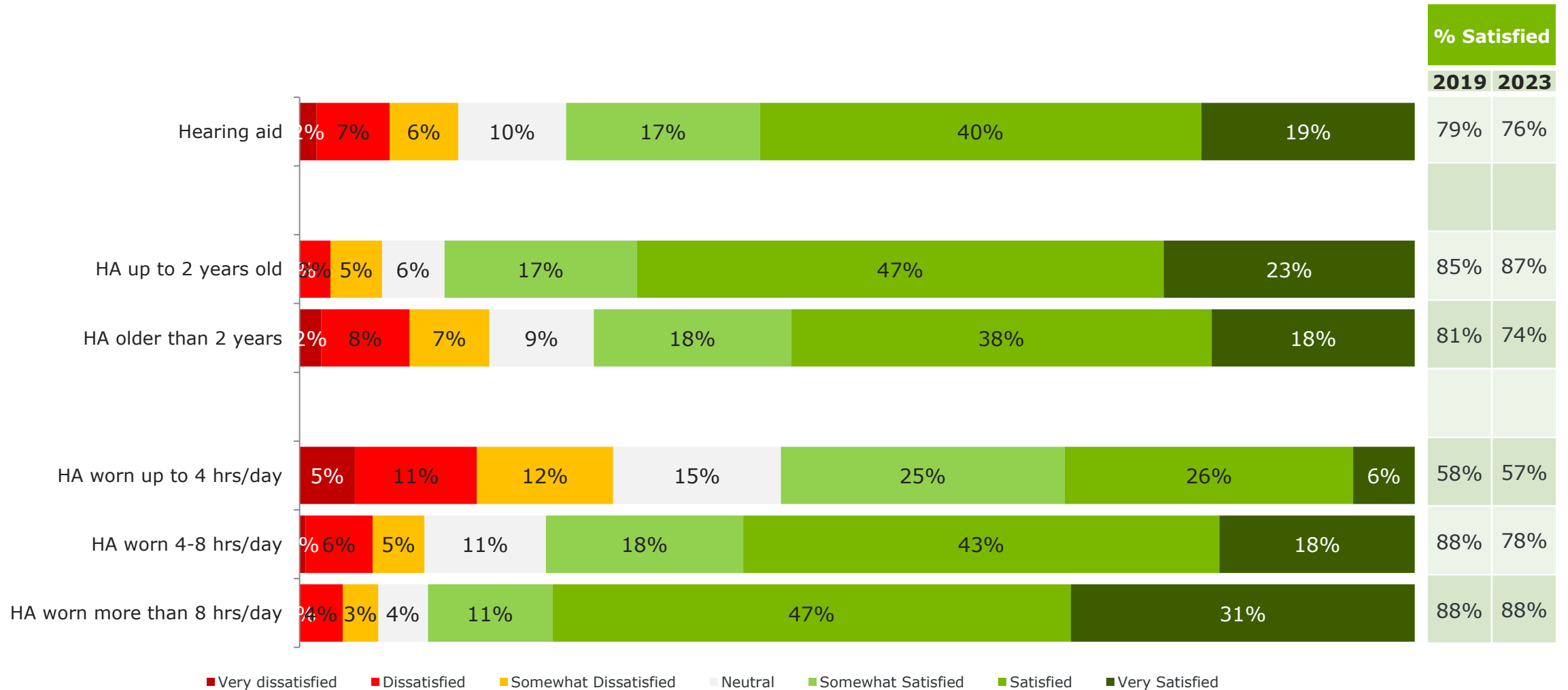
How have the expectations you had towards hearing aids before trying them on for the first time been met?



n=456



Overall satisfaction with HA: 76% of hearing aid owners are satisfied with their hearing aid(s) (2019: 79%)



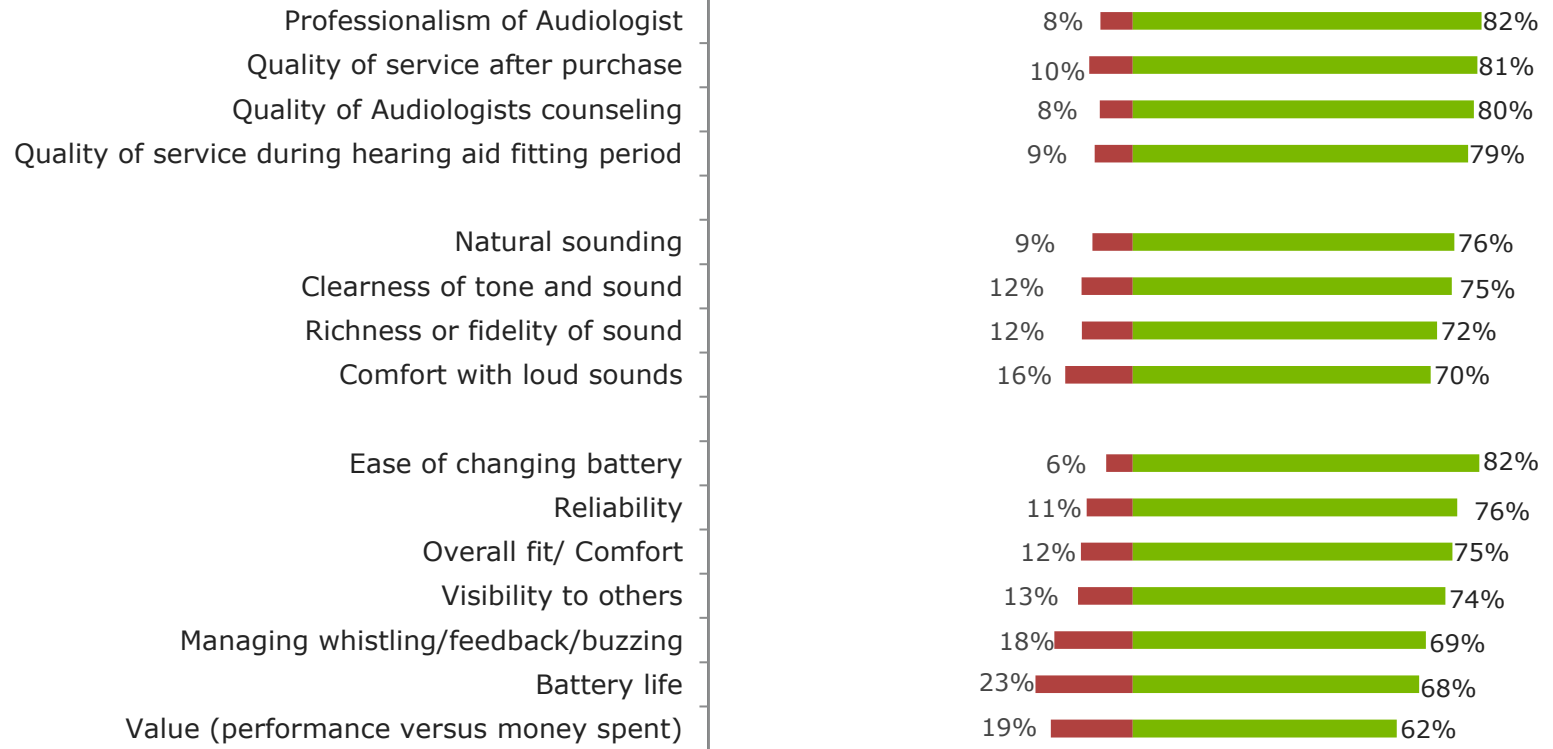


Satisfaction with current hearing aids

HA dispenser/
Audiologist

Sound quality
signal process.

Product
features



Trend*
+1%
+1%
-1%
+/-0%
+5%
+3%
+1%
+3%
+7%
+1%
+1%
+9%
+7%
+2%
-1%

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

*% of satisfied HA Owners compared to 2019

■ dissatisfied ■ satisfied

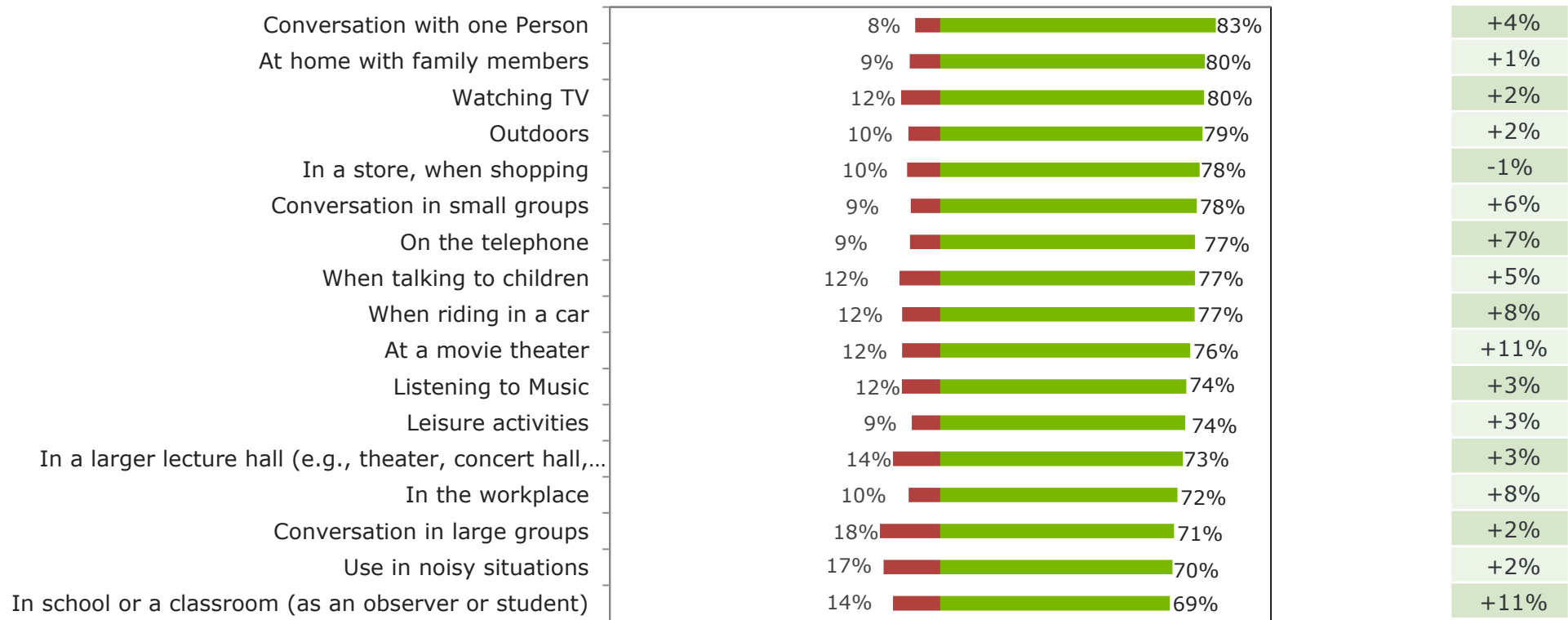
HA Owner n=456





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 2019

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*

Category	Factor	Influence Score
HA dispenser / Audiologist	Quality of service after purchase	0.69
	Quality of HA dispensers / Audiologists counseling	0.65
	Professionalism of Hearing aid dispenser / Audiologist	0.60
	Quality of service during hearing aid fitting period	0.60
Sound quality signal processing	Natural sounding	0.71
	Clearness of tone and sound	0.70
	Richness or fidelity of sound	0.67
	Comfort with loud sounds	0.60
Product features	Value (performance versus money spent)	0.71
	Reliability	0.70
	Overall fit / Comfort	0.67
	Managing whistling/feedback/buzzing	0.65
	Ease of changing battery	0.54
	Battery life	0.52
	Visibility to others	0.49

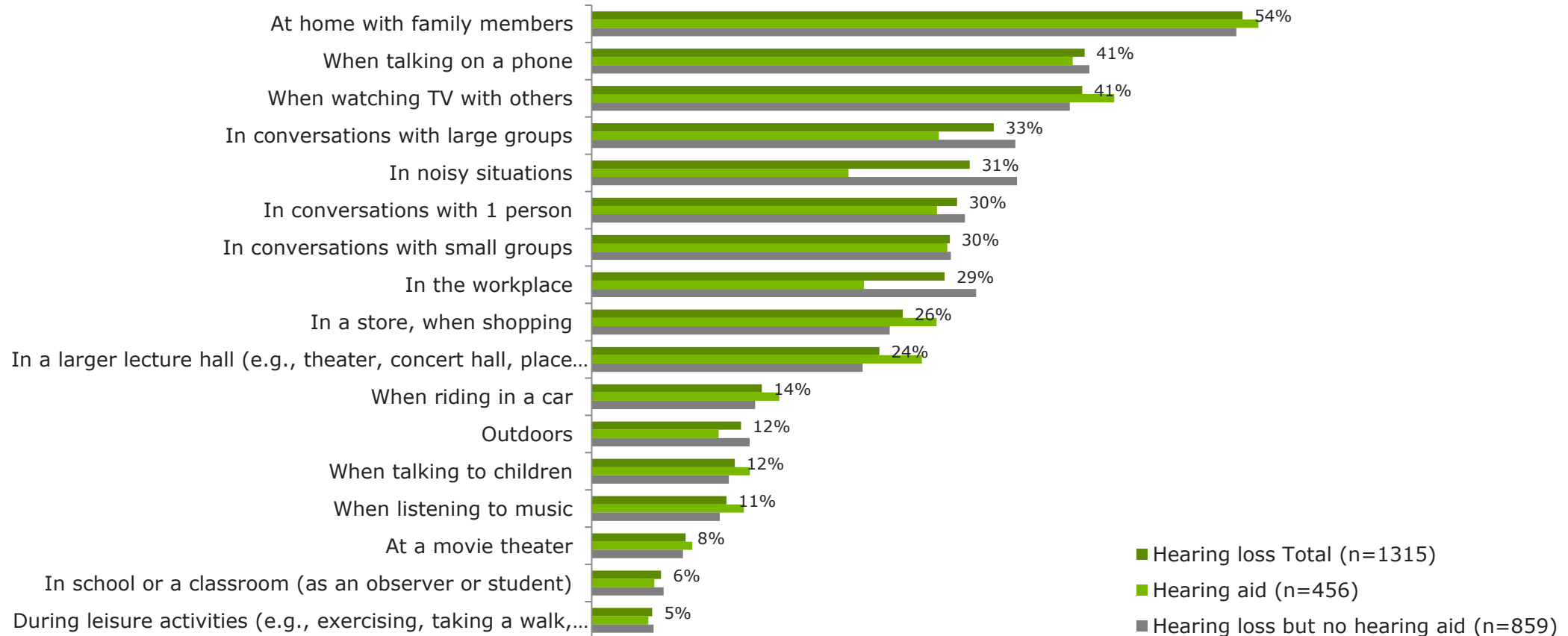
This topic correlates highly with satisfaction in 2023

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



Talking at home with family members, talking on a phone and watching TV with others are the most frequent important listening situations

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





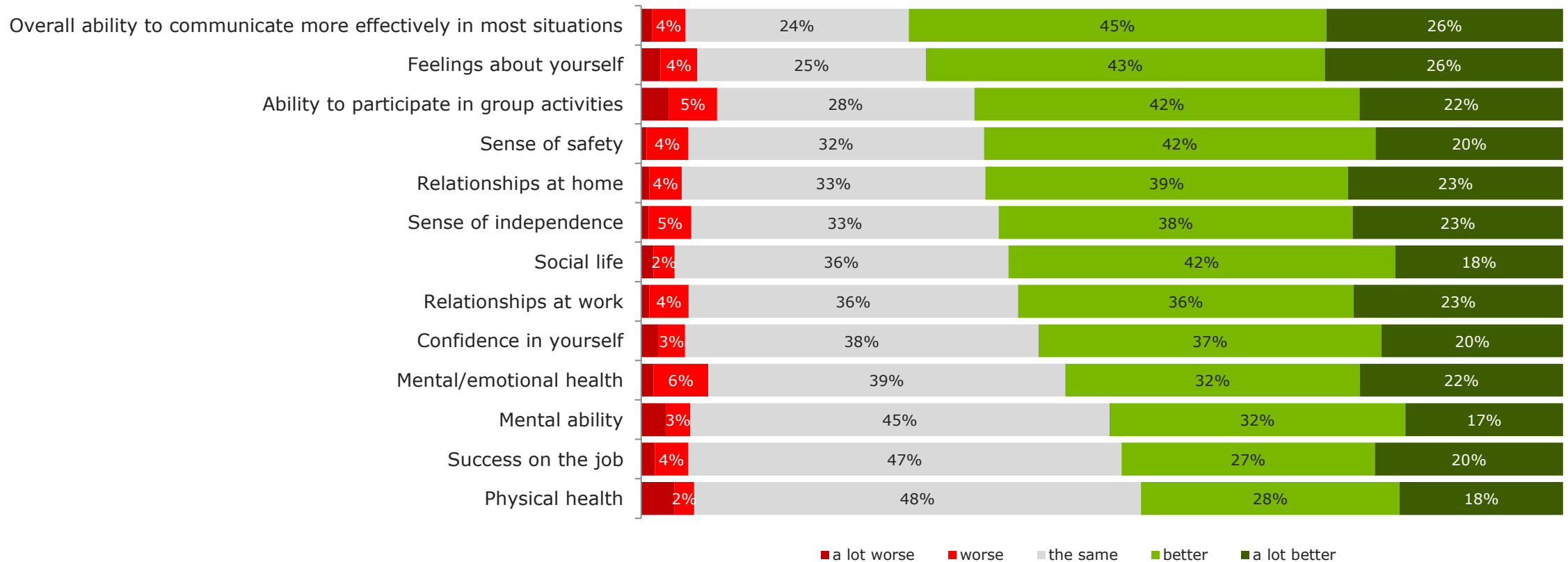
Positive impact of hearing aids, quality of life





There is a significant positive impact of HAs on different aspects: Communication effectiveness and feelings about themselves improve – but also group activities and a sense of safety

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).



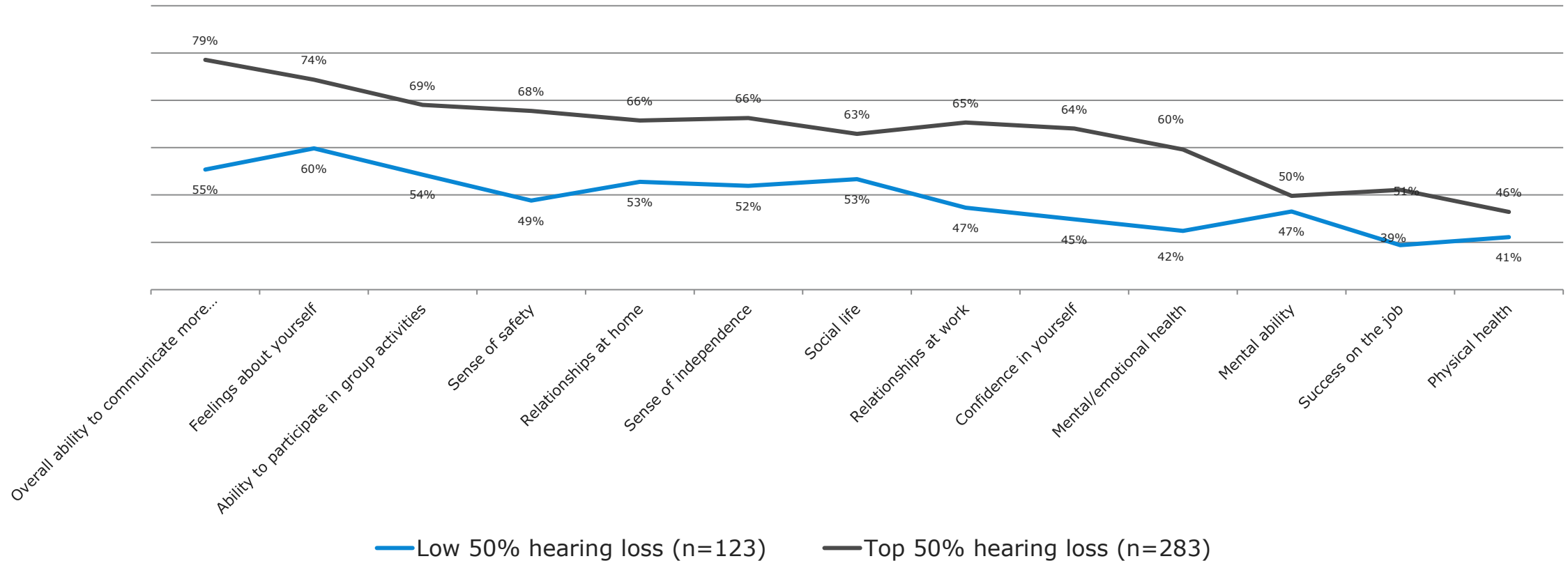
HA Owner n=456





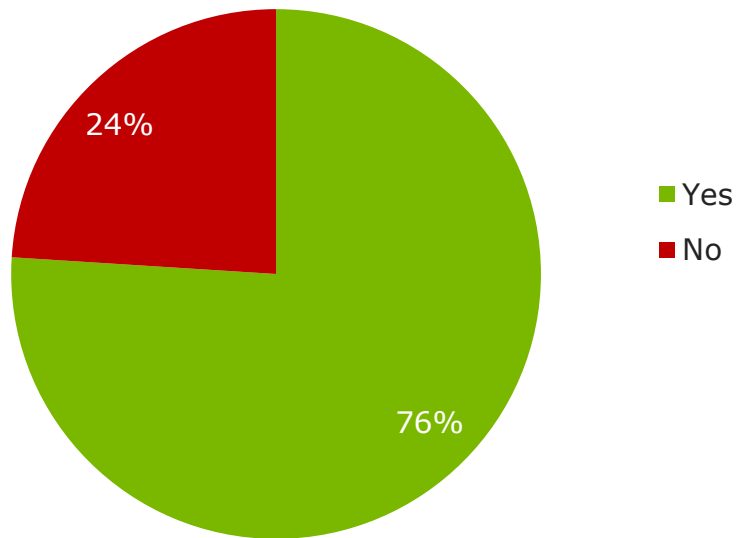
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA Owners feeling better/a lot better



76% 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?

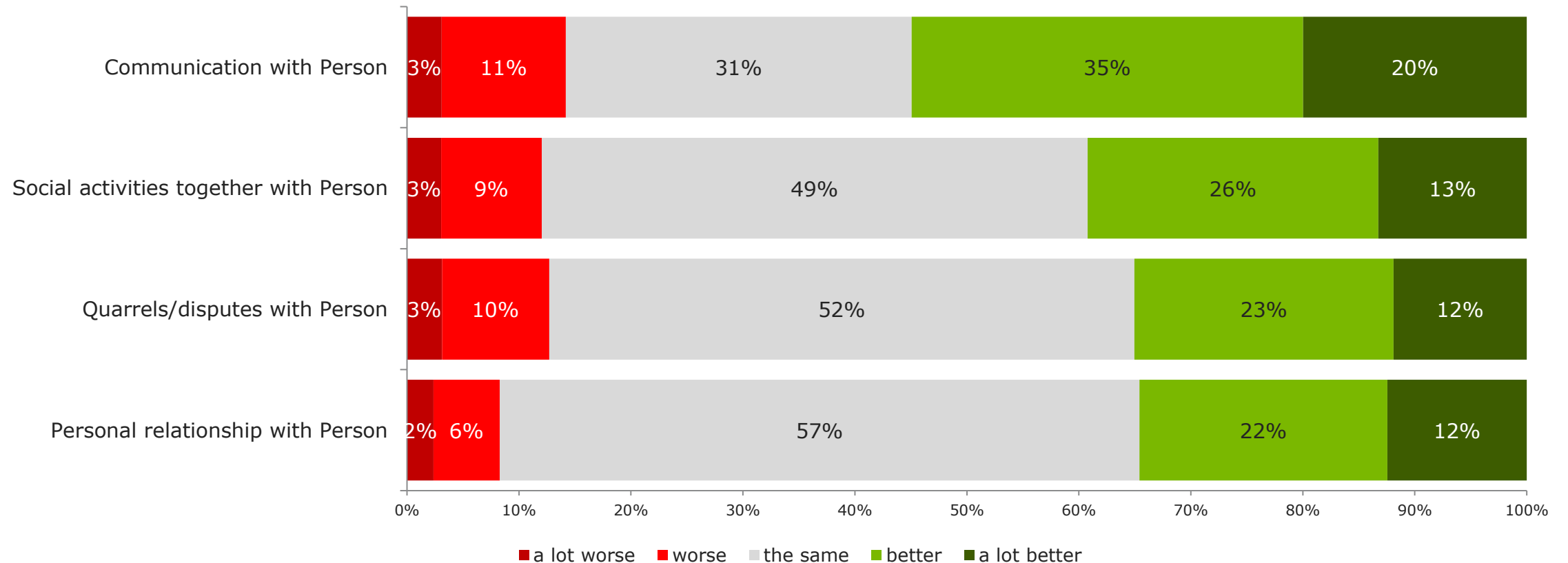


n=456



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?

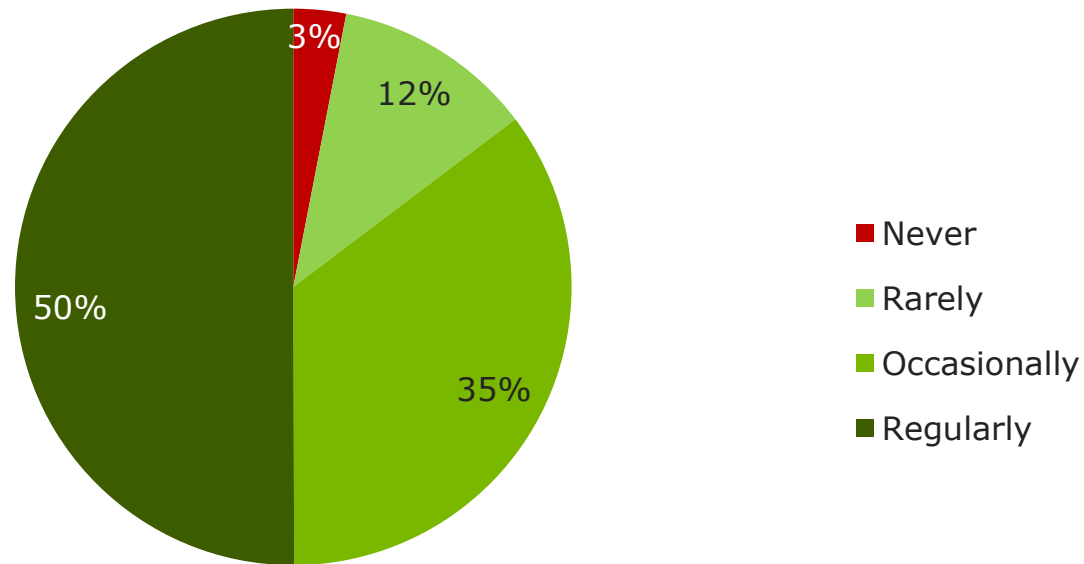


Someone in HH / parent has HA, n=429



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=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

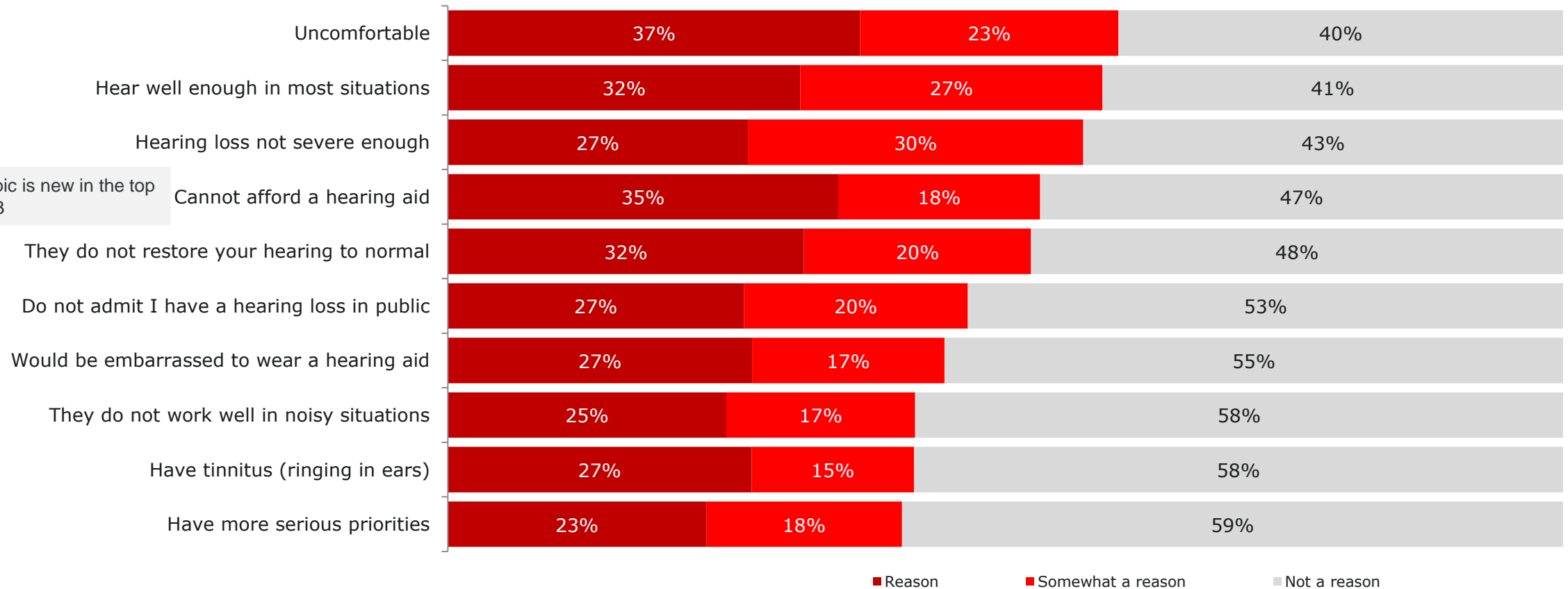
	HA Owner n=456	HA Non-owner low 50% HL n=399	HA Non-owner Top 50% HL n=281
Ears impaired (stated)			
Unilateral loss	28%	43%	24%
Bilateral loss	72%	57%	76%
Perceived loss		More similar hearing loss-structure	
Mild	11%	58%	20%
Moderate	39%	34%	52%
Severe	35%	7%	22%
Profound	15%	1%	6%





Top 10 reasons for not having a hearing aid

This topic is new in the top 10 2023

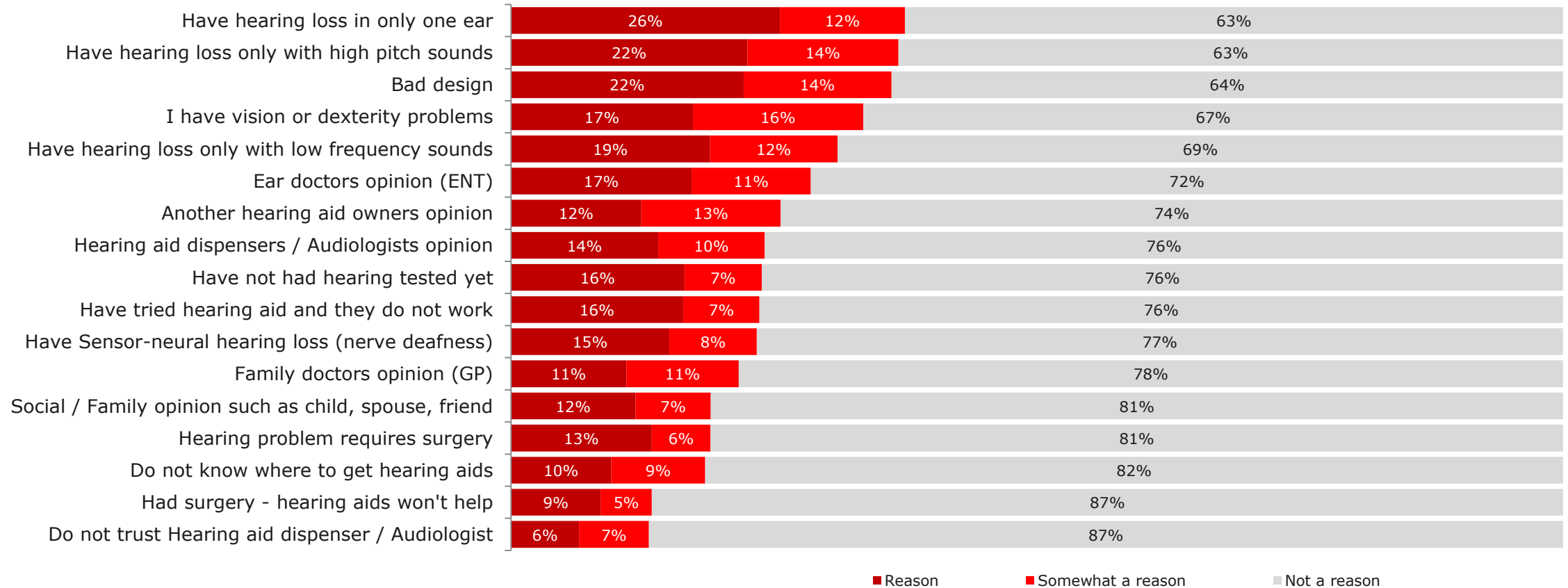


Non-Owner Top 50% hearing loss n=281





Less important reasons for not having a hearing aid

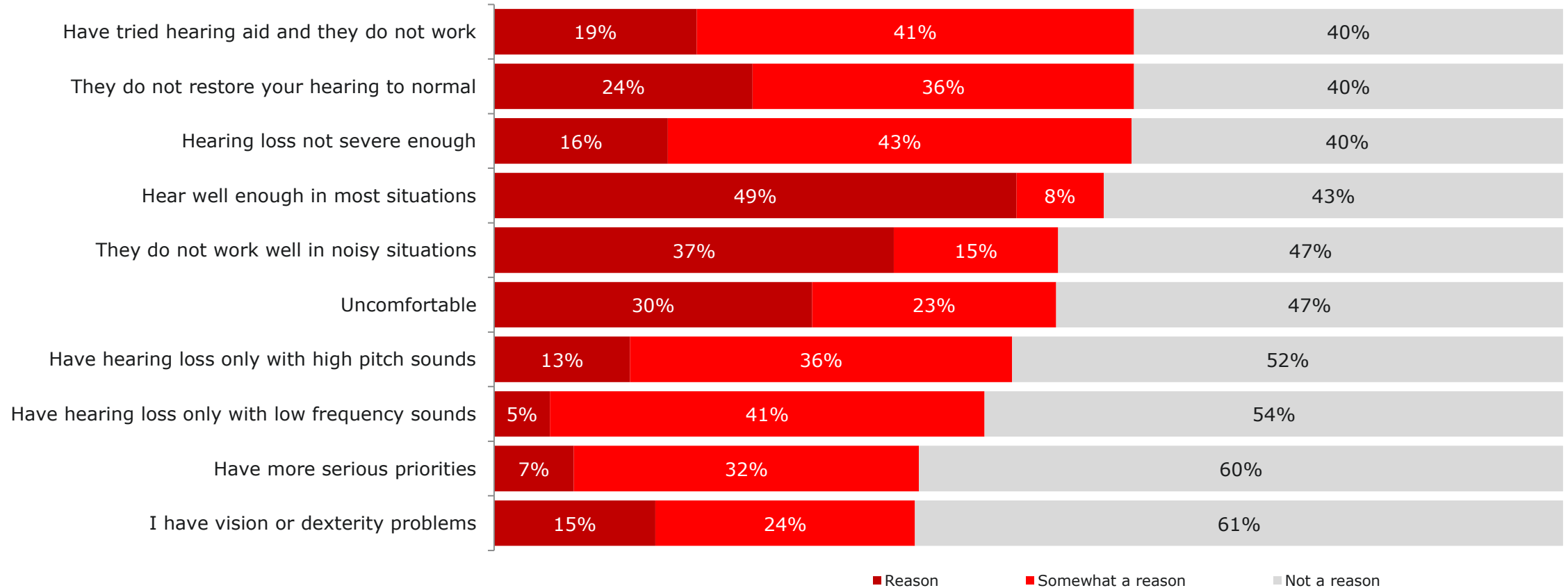


HA Non-owner Top 50% hearing loss n=281





Top 10 reasons for HA owners NOT using them



HA Owners who don't use, n=30 (low sample!)





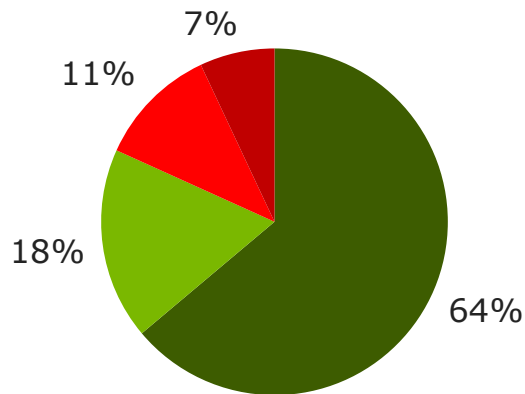
Social rejection because of hearing loss compared to the acceptance of hearing aids



64% 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:

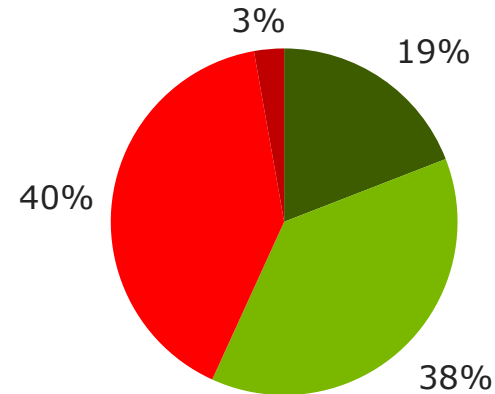
How often do you feel you are made fun of or rejected because you are wearing a hearing aid?



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=281

- Never
- Rarely
- Occasionally
- Regularly





Most important triggers to buy

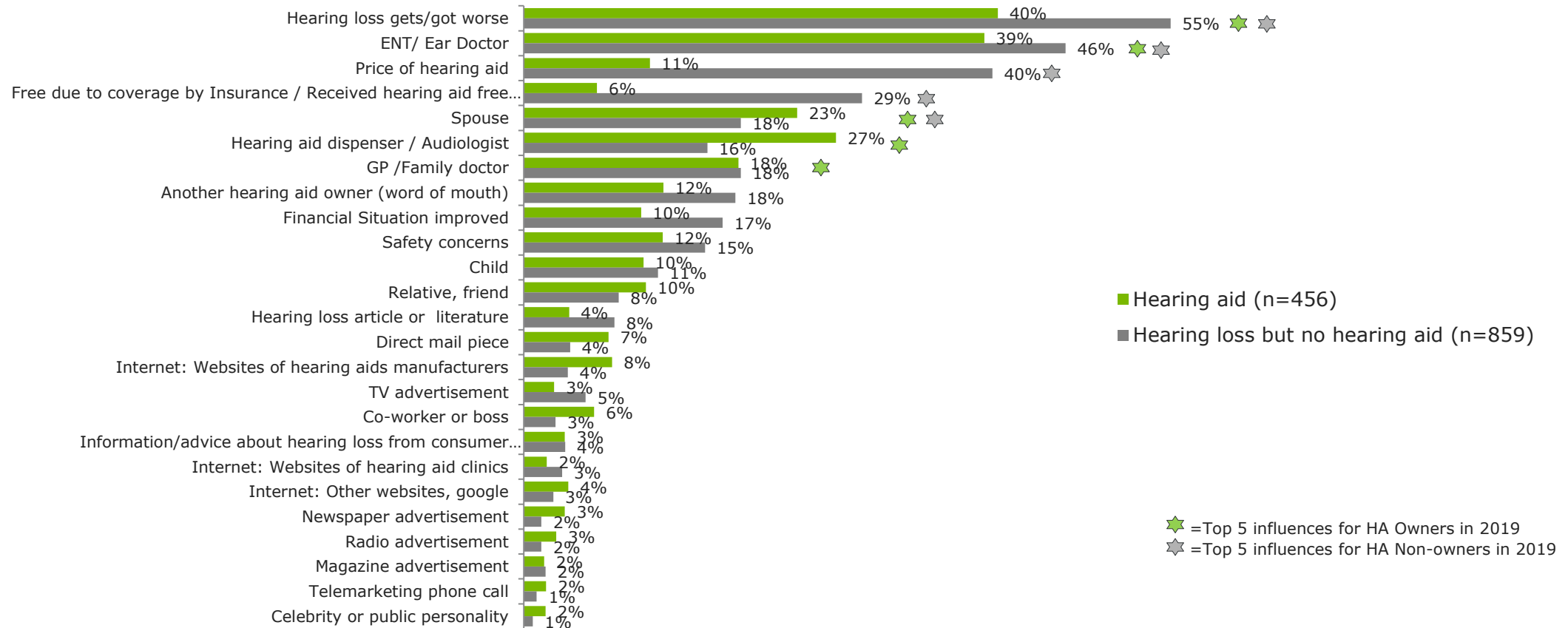




The most important influencing factors for HA owners were worsening hearing loss, ENT, GP, spouse, and an audiologist. For the non-owners, financial aspects play a crucial role (price, insurance coverage)

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

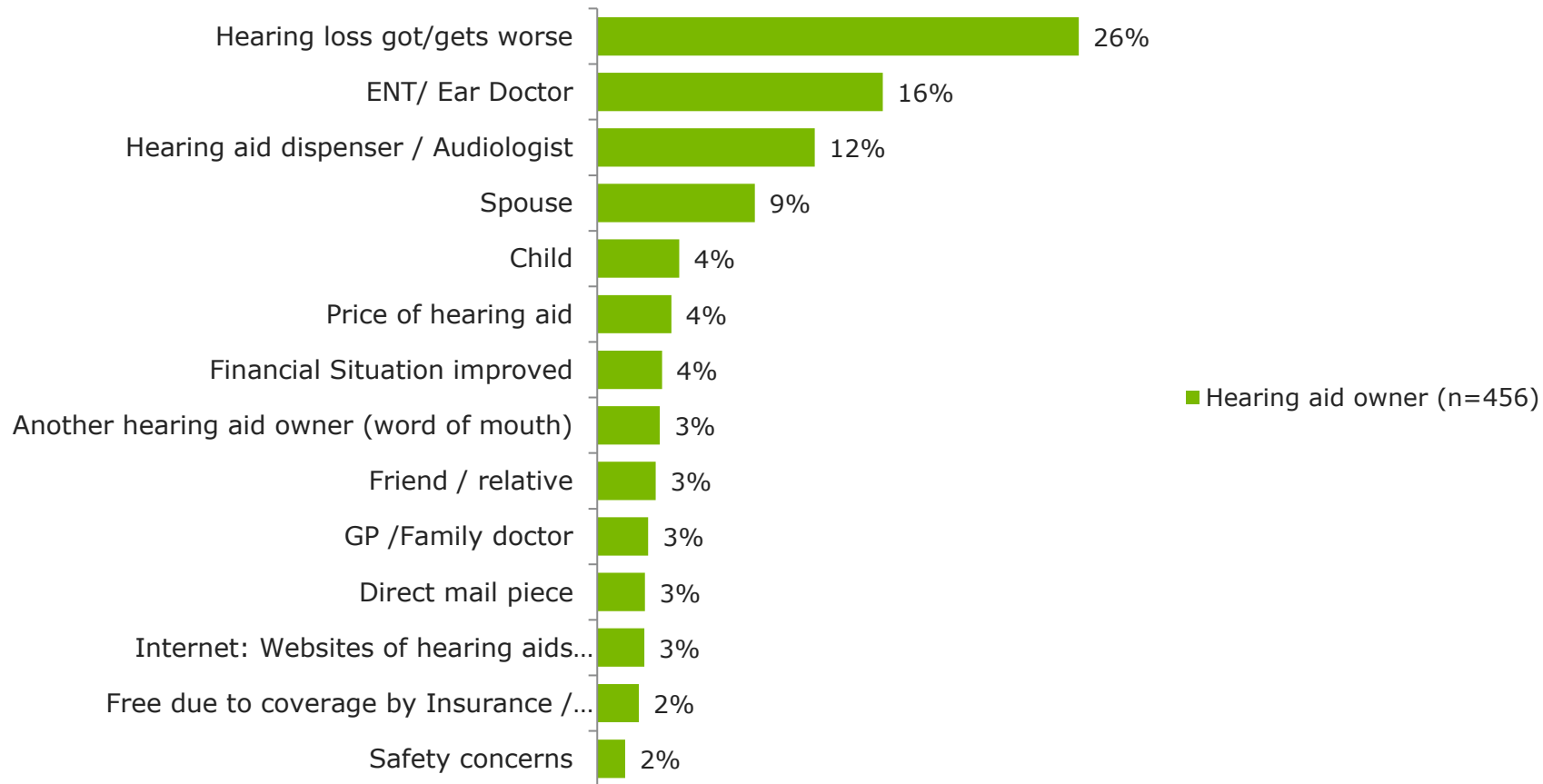
HA Non-owner: What do you think would influence you to obtain / purchase a hearing aid ?





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

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





Stefan Ruf lic. rer. pol.

Anovum GmbH
Sumatrastrasse 25
CH-8006 Zürich

Telefon +41 (0)44 576 76 77
Mobil +41 (0)78 717 88 01
Email stefan.ruf@anovum.com

www.anovum.com



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 (HA Non-owner)	Hearing aids (HA Owner)
Gender						
Male	7'200	12.0%	26.6%	47.4%	49.3%	46.0%
Female	7'962	11.6%	29.3%	52.6%	50.7%	54.0%
Age						
1 - 14	2'174	2.5%	31.2%	15.9%	2.9%	3.3%
15 - 24	1'497	4.6%	37.9%	10.7%	3.3%	5.2%
25 - 34	1'994	8.0%	32.8%	13.7%	8.3%	10.4%
35 - 44	2'576	8.3%	25.3%	17.7%	12.4%	10.8%
45 - 54	2'176	9.1%	11.6%	14.8%	13.6%	4.6%
55 - 64	1'818	14.5%	21.1%	11.6%	16.1%	11.1%
65 - 74	1'816	21.7%	27.0%	10.6%	22.3%	21.2%
74+	1'111	39.6%	38.0%	5.0%	21.2%	33.4%
Type of household						
single household	1'380	22.2%	33.6%	8.0%	15.7%	20.5%
Couple, no kids	3'814	16.5%	32.1%	23.8%	33.0%	40.2%
Couple with kid(s)	7'575	7.7%	23.2%	52.3%	34.8%	27.0%
Single mom/dad with kid(s)	823	10.2%	17.3%	5.5%	5.4%	2.9%
Retirement home, hospital etc.	46	50.1%	36.7%	0.2%	1.1%	1.7%
Other	1'524	11.0%	23.2%	10.1%	10.0%	7.8%





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)	7'877	15.4%	27.8%	49.9%	67.6%	67.2%
The spouse of the head of the household	2'363	13.2%	30.2%	15.3%	16.9%	18.8%
Daughter/son of head of household	3'850	2.8%	26.7%	28.0%	6.2%	5.8%
Other person	1'072	15.0%	25.4%	6.8%	9.3%	8.2%
Employment						
Full time employed	6'967	9.3%	22.7%	56.8%	39.9%	30.4%
Part time employed	658	10.2%	22.8%	5.3%	4.1%	3.2%
Unemployed / not working	666	8.6%	15.1%	5.5%	3.9%	1.8%
Retired under a disability pension scheme (fully or partly)	403	18.1%	35.1%	3.0%	3.8%	5.3%
Early retired under an early retirement benefit scheme	133	20.5%	28.6%	0.9%	1.6%	1.6%
Retired (at the official retirement age)	3'080	27.0%	32.2%	20.2%	45.0%	55.4%
Student / pupil / in training	956	3.5%	34.0%	8.3%	1.8%	2.4%
Education						
Niepełne podstawowe	36	27.0%	16.7%	0.2%	0.6%	0.3%
Podstawowe	651	19.9%	28.3%	4.7%	7.4%	7.6%
Gimnazjalne	147	13.7%	45.4%	1.1%	0.9%	1.9%
Zasadnicze zawodowe	1'627	19.4%	28.8%	11.8%	18.0%	18.8%
Średnie ogólnokształcące	1'646	12.0%	30.6%	13.0%	11.0%	12.5%
Średnie zawodowe	2'302	14.7%	27.2%	17.6%	19.7%	19.1%
Policealne	860	13.5%	34.9%	6.7%	6.0%	8.4%
Wyższe	5'397	11.0%	24.7%	43.2%	35.7%	30.4%
Other	199	7.1%	34.6%	1.7%	0.7%	1.0%



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