

Results

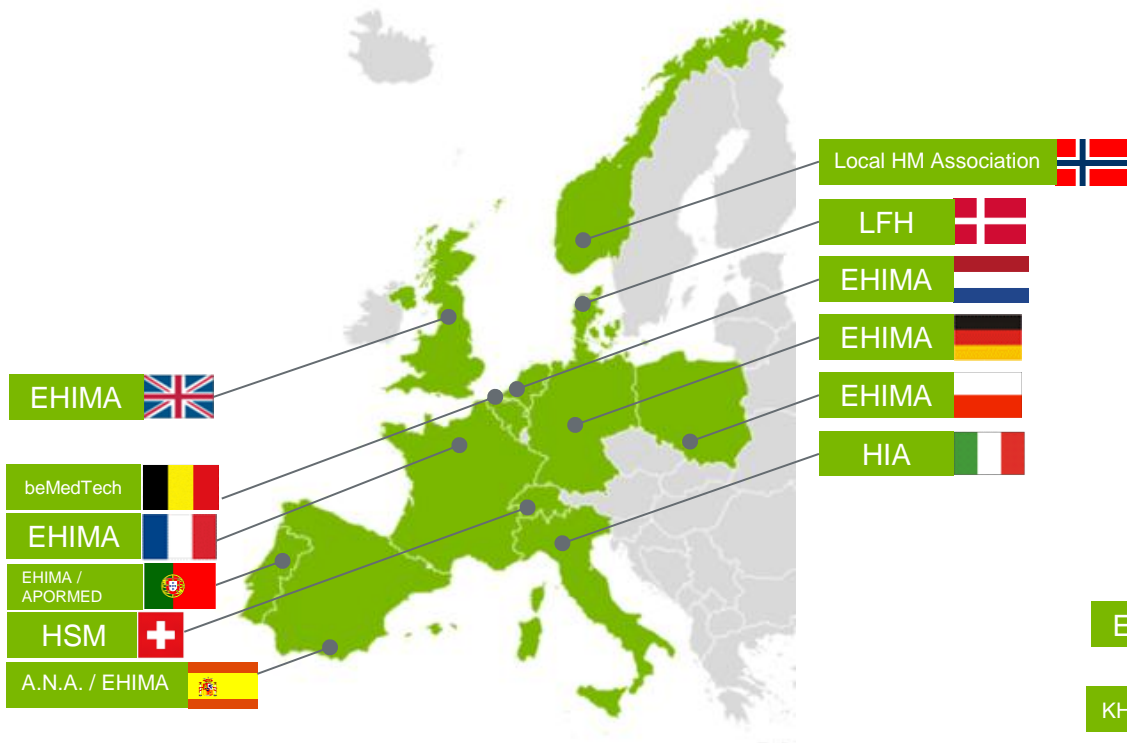
EuroTrak Germany (GER) 2025

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

Summary

1. Introduction

EuroTrak GER 2025 is part of the EuroTrak / APACTrak studies:



EuroTrak GER 2025 was designed and executed by Anovum (Zurich) on behalf of EHIMA and BVHI.

Sample sizes:

Representative sample (sample 1): n=13'445 people

Hearing impaired (sample 2): n=1'320 people

Hearing impaired non-owners (HA Non-owner): n=657 people

Hearing aid owner (HA Owner): n=663 people



Summary

2. Market overview

- **Stated hearing loss prevalence**
 - Total: 10.9%, 18+: 12.6%.
 - Hearing Tests: Hearing Tests: 43% had a hearing test in the last five years, most of which were done by ENTs, followed by family doctors and Audiologists.
- **Hearing aid adoption rate (HA penetration)**
 - 47% of those with self-declared HL.
 - 5.1% of total population.
 - 74% of HA owners have binaural treatment.
- **The route to the hearing aid**
 - 82% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
 - 65% got hearing aids recommended from the ENT or family doctor (drop out rate=21%).
 - 64% of the GP consultations referred to an ENT, 39% to an Audiologist, and 14% to get hearing aids. 7% recommended no action.
 - 43% of ENT consultations were referred to an Audiologist, 49% recommended getting a hearing aid, and 22% 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.
 - 55% of employed individuals using hearing aids believe the devices enable them to work longer

Summary

3. Analysis of hearing aid owners

- **Hearing aid ownership, usage, and accessories**
 - 92% of all HA owners received some 3rd party reimbursement.
 - 46% of the currently owned HAs were acquired in 2022 or later.
 - The median age of hearing aids before replacement is six years.
 - On average, HAs are worn 8.8 hours a day.
 - RICs are the most often purchased type of HA.
 - Cochlear Implants: 20% 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 80% are satisfied.
 - 15% of the HAs are (to the knowledge of the owners) equipped with Telecoil. The main usage of Telecoil is the phone.
- **Importance of listening situations and satisfaction with HAs**
 - 85% of the hearing aid owners say their hearing aid works better than or as expected.
 - 80% of the HA owners are satisfied with their hearing aids.
 - 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.
 - The most important listening situations are talking at home with family members, talking on the phone, 1to1 conversations, and watching TV with others
- **Positive impact of HAs**
 - Hearing aids have a positive impact on social participation, sense of safety, group activities, and more.
 - 75% of hearing aid owners feel more confident moving in a city since wearing hearing aids.
 - Hearing aid users feel more confident driving a car or (e-)biking.
 - 97% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
 - 64% of all HA owners think they should have gotten their HAs sooner

Summary

4. Analysis of hearing impaired non-owners

- **Reasons not to own/use HAs**

- Only 37% 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 discomfort, belief in sufficient hearing, and affordability.
- 4% who own hearing aids don't use them (0 hours); 11% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**

- 72% 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 getting hearing aids are worsening hearing, ENT, audiologists, spouses, and GPs (+price, insurance coverage for the nonowners)

Detailed Results: Roadmap

1. Introduction

- Organisation of EuroTrak GER 2025
- 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, third party payment
 - 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 GER 2025

Organisation

- Principal of the project EuroTrak GER 2025 are: EHIMA and BVHI.
- Anovum Zurich developed the concept of EuroTrak GER, 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 GER/2025/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=13'445** 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= 657** hearing impaired non-owners and **n=663** hearing aid owners



2. Market overview



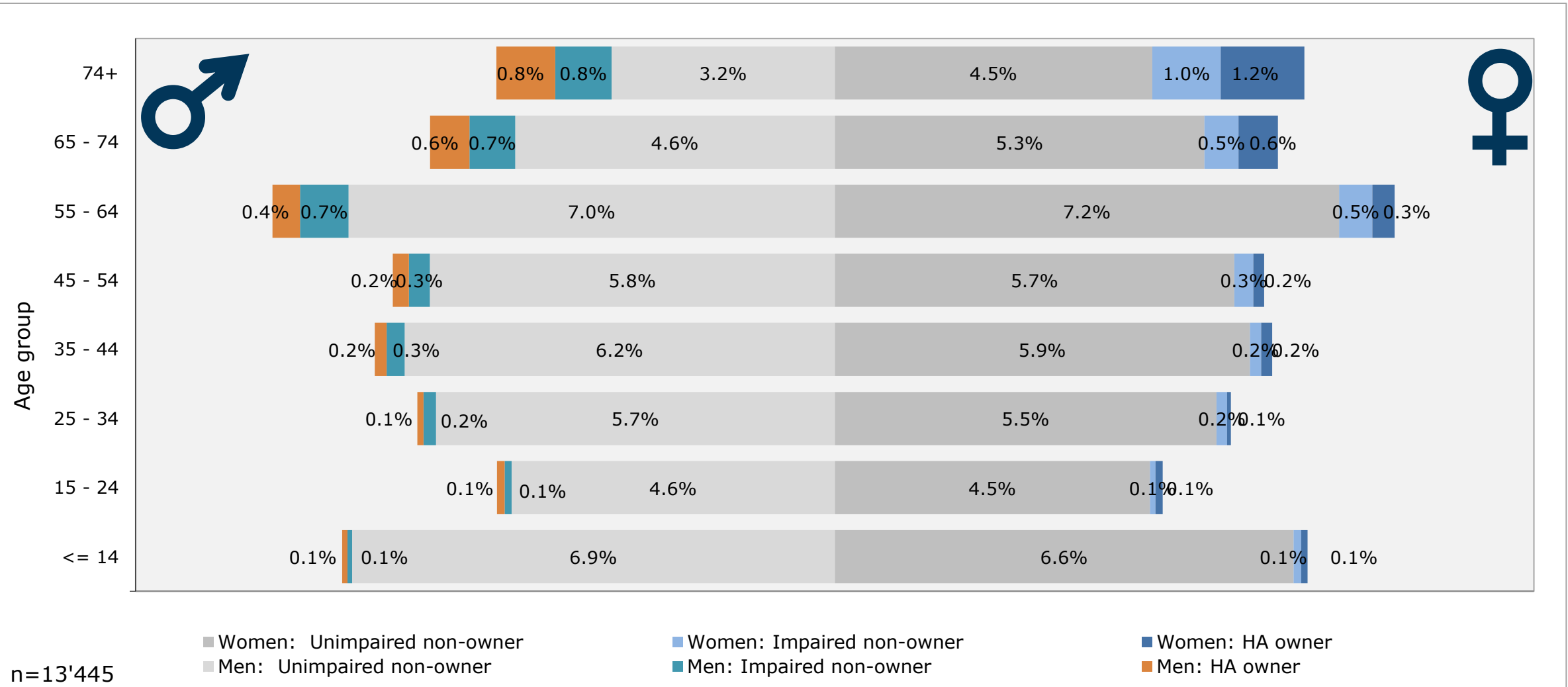


Prevalence of hearing loss and adoption rate





Hearing loss and hearing instrument ownership by gender/age



n=13'445

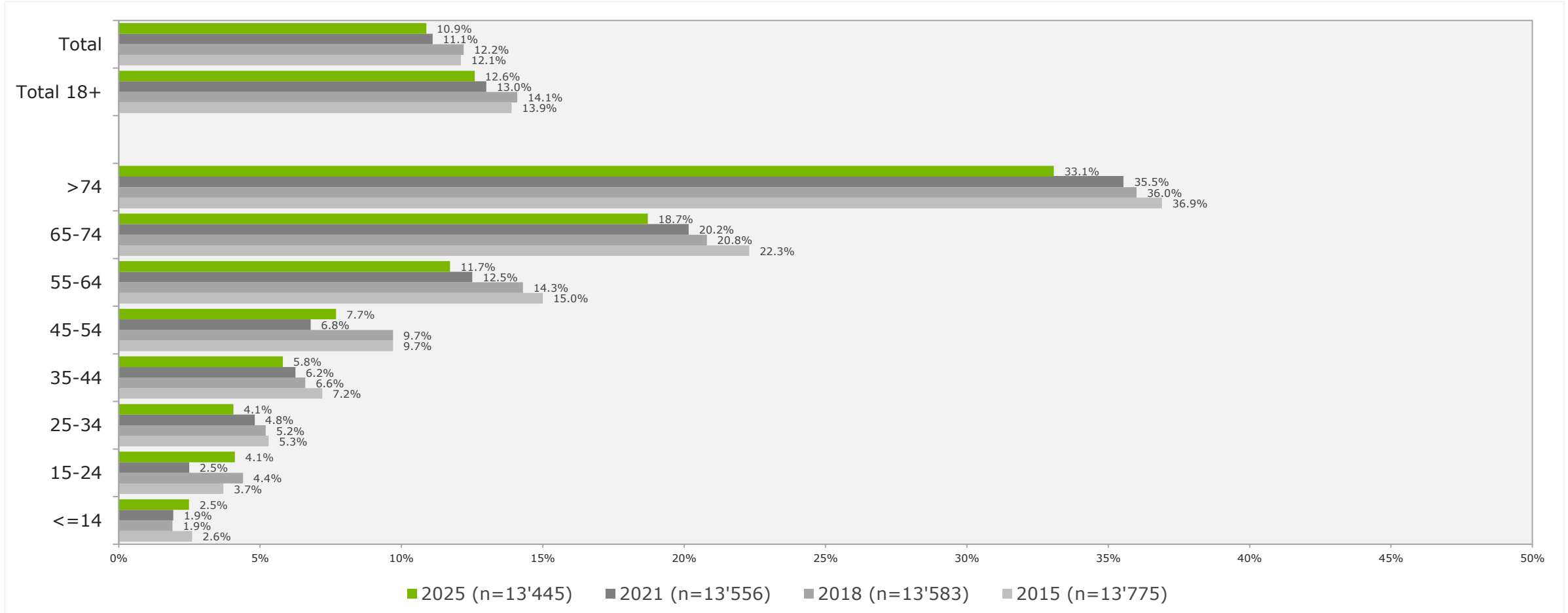




Hearing loss prevalence GER

Self-declared hearing loss

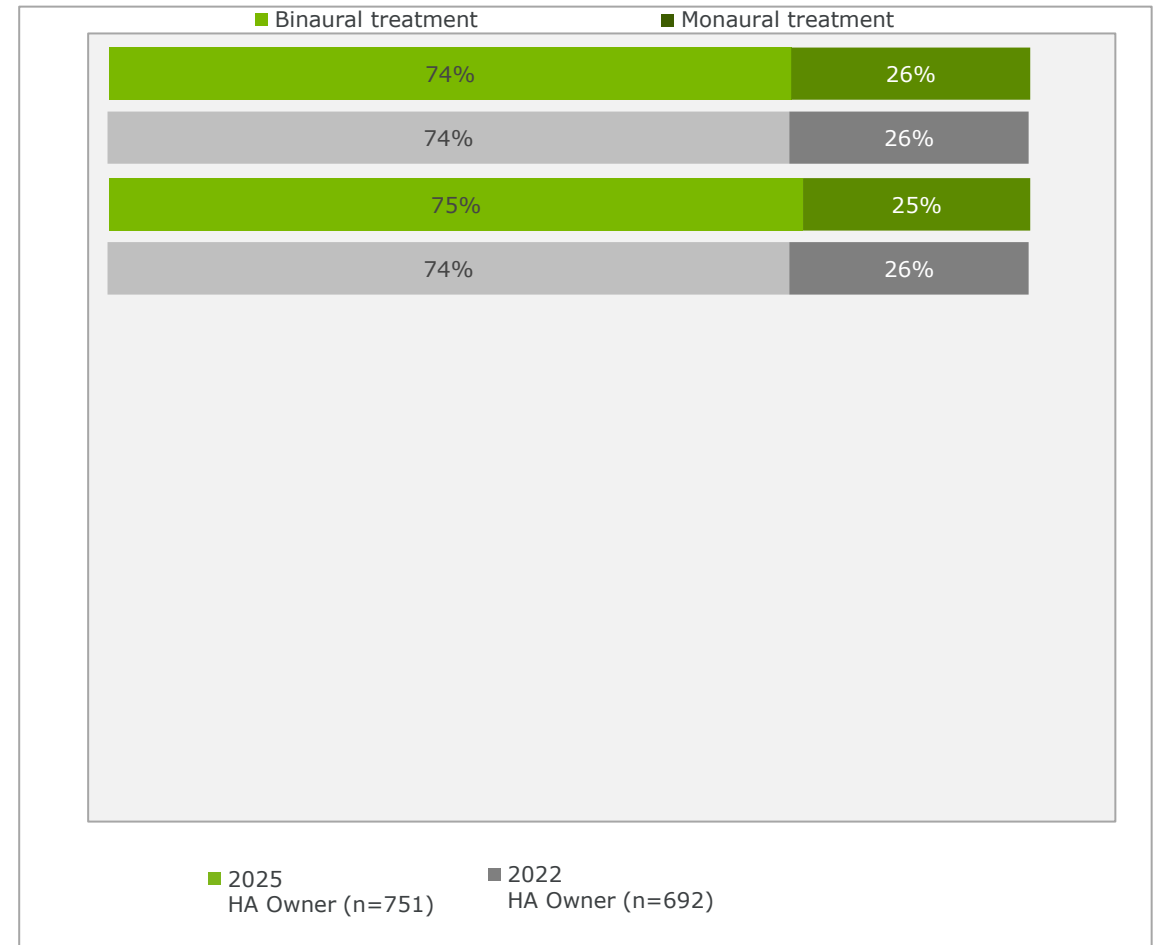
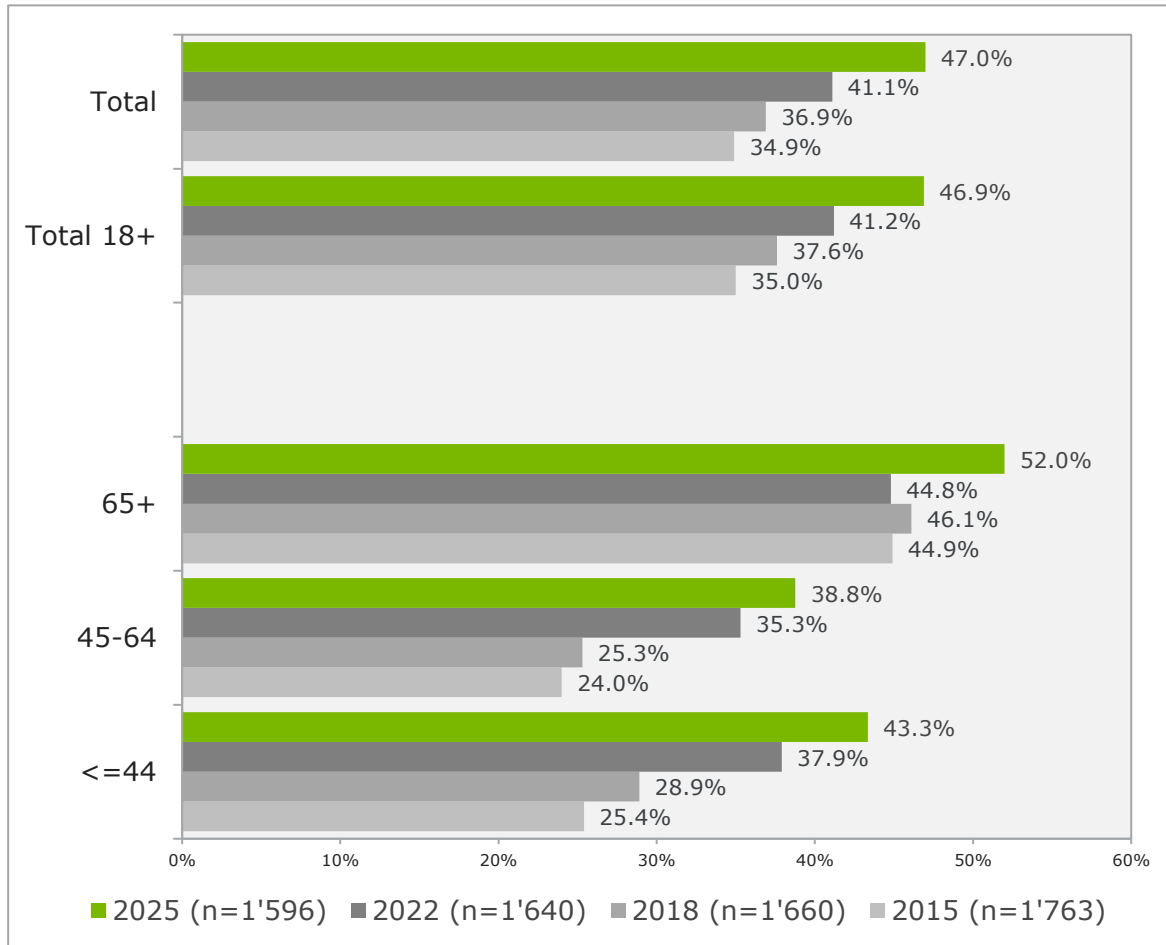
% hearing loss prevalence





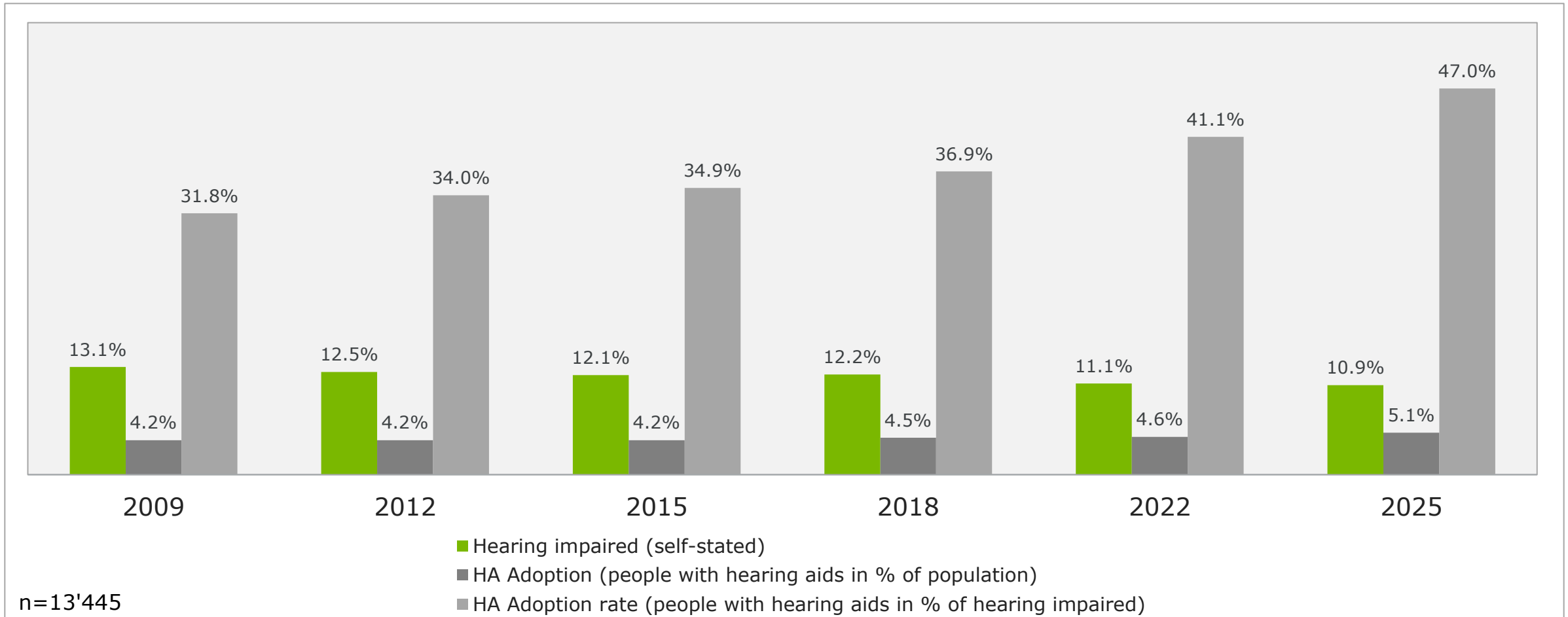
Hearing aid adoption rate: 47% of the hearing impaired have hearing aid(s), and 74% of them have binaural treatment

% of hearing impaired



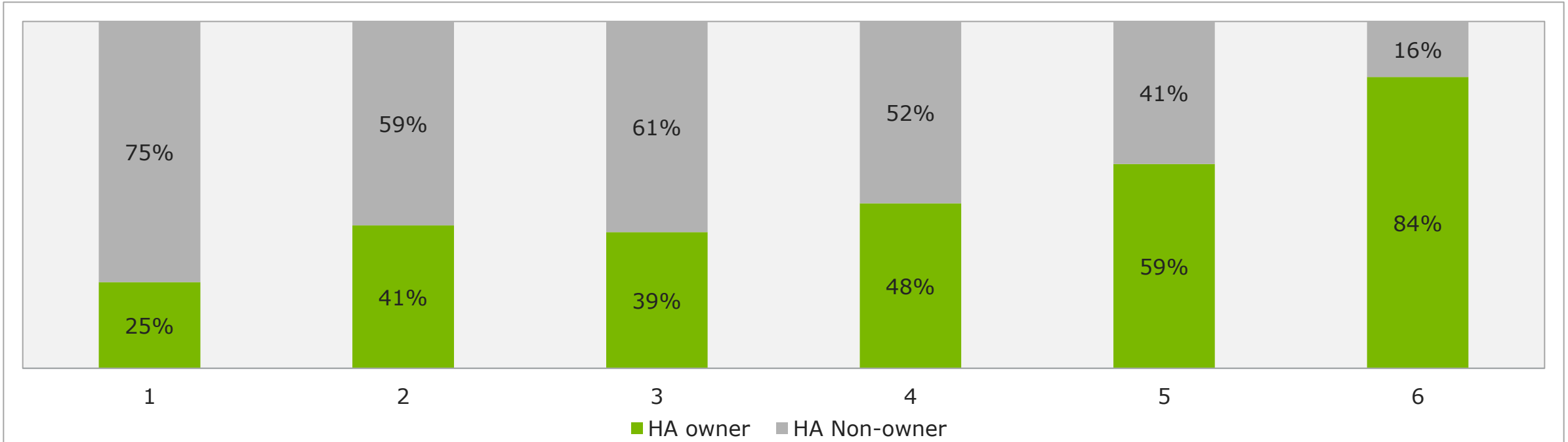


Overview of hearing loss prevalence and hearing aid adoption





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



Hearing loss sixtile-groups

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

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

HA Non-owner n=657
HA Owner n=663



Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	HA Non-owner n=657	HA Owner n=663	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	37%	16%	31%
Bilateral loss	63%	84%	56%
Perceived loss			
Mild	41%	13%	23%
Moderate	51%	52%	48%
Severe	6%	26%	79%*
Profound	2%	9%	

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



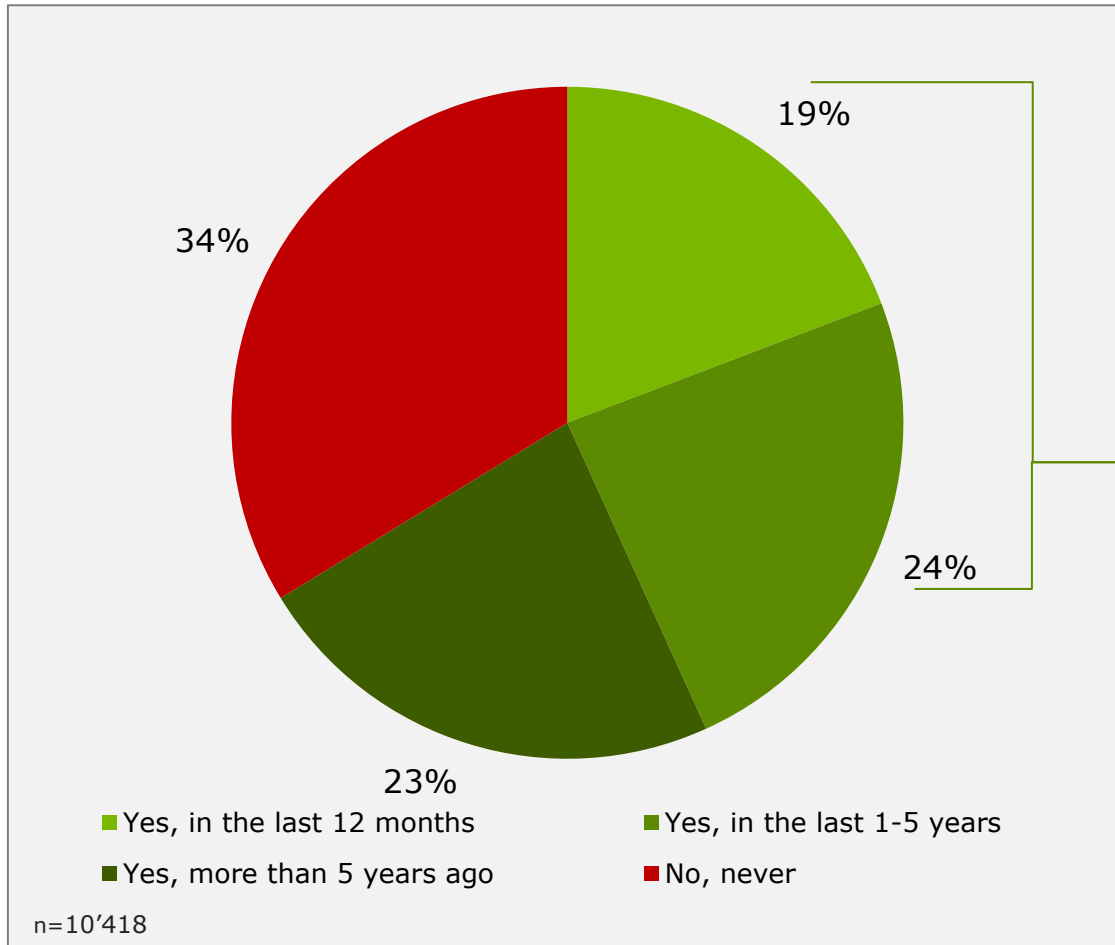
Hearing tests and where hearing is tested



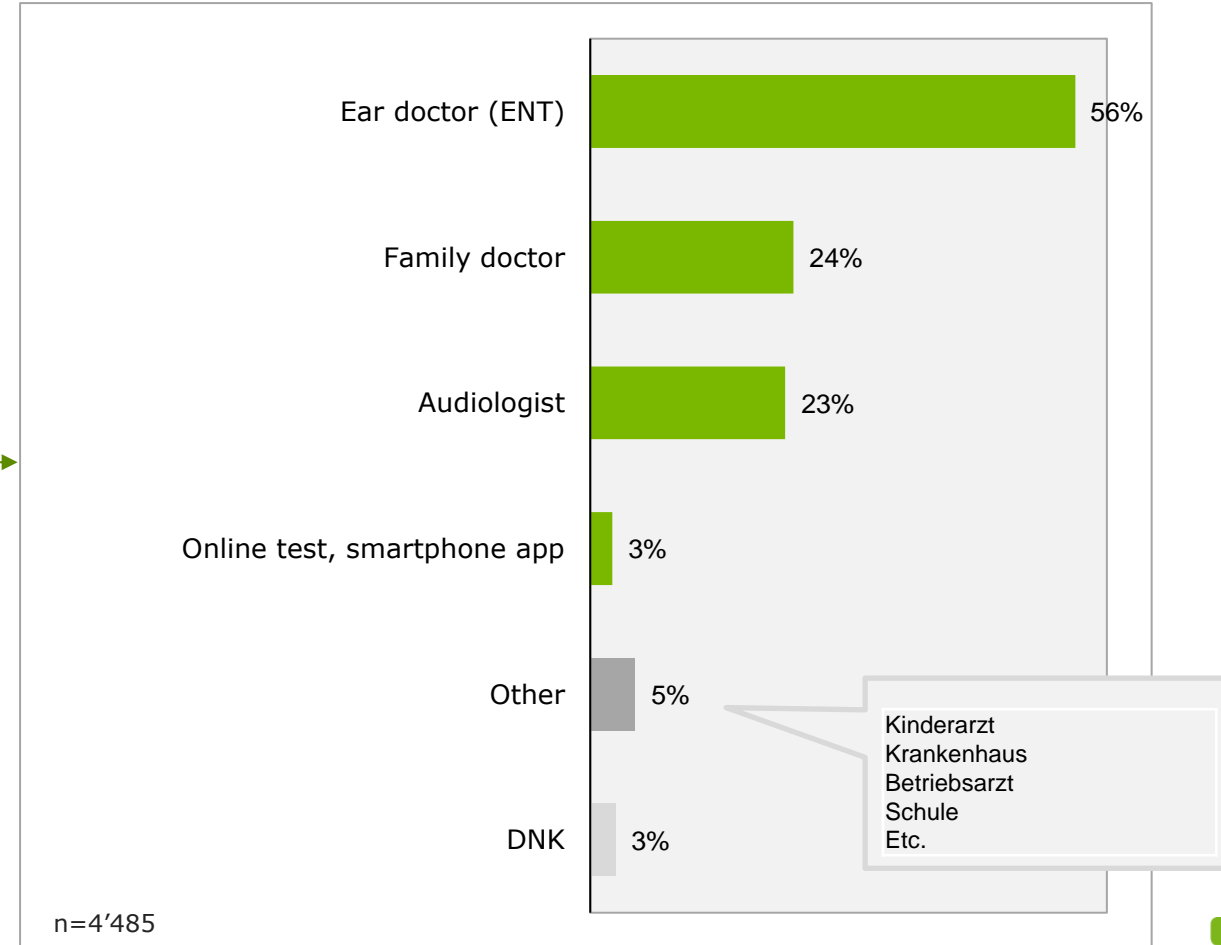


Hearing Tests: 43% had a hearing test in the last five years, most tests done by ENTs

Have you ever taken a hearing test?



Where/how was your hearing tested?





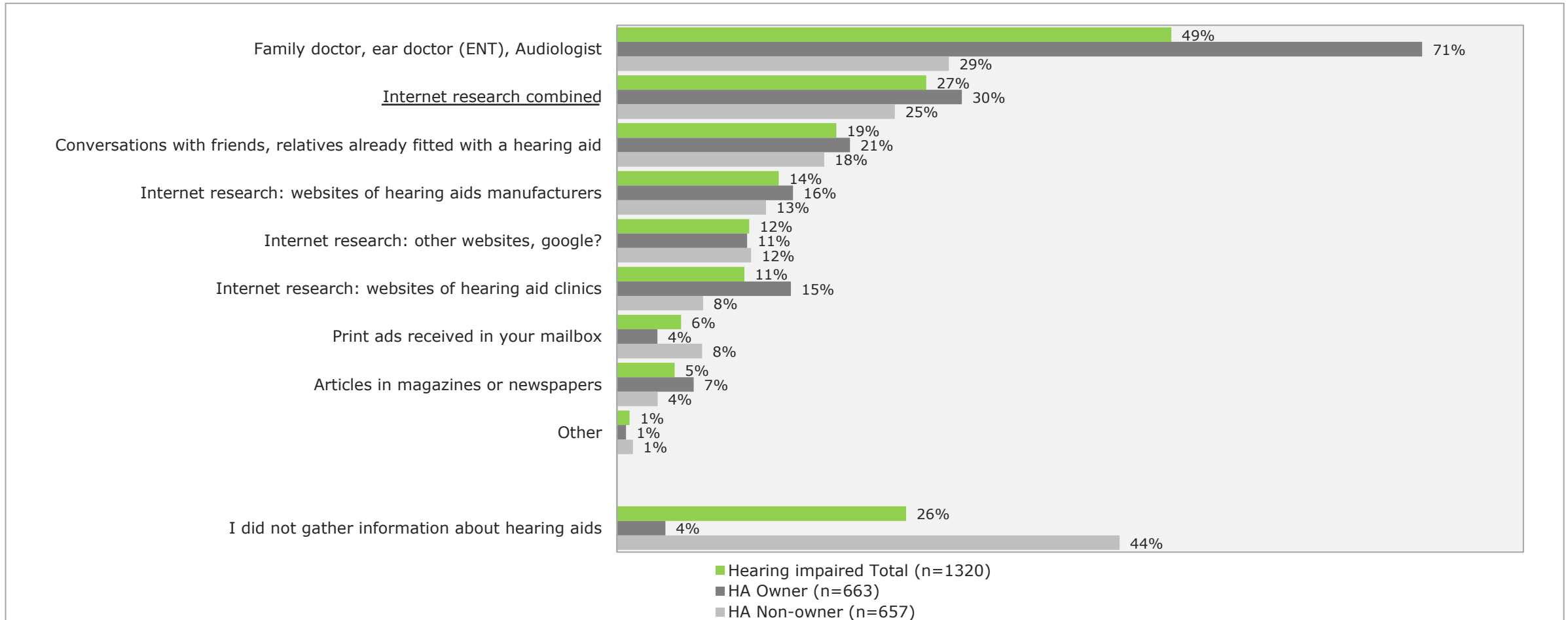
The route to the hearing aid: Sources of information and drop-out rates





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

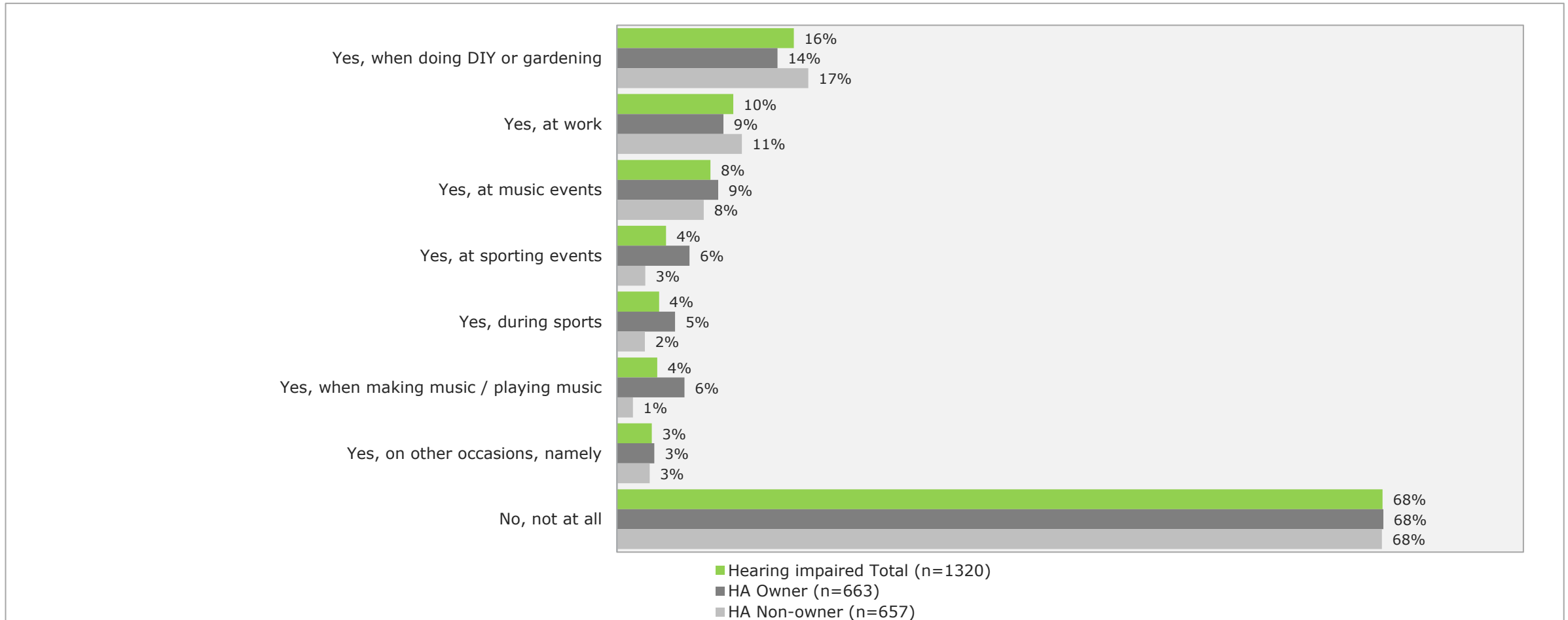
Where did you gather information about hearing aids?





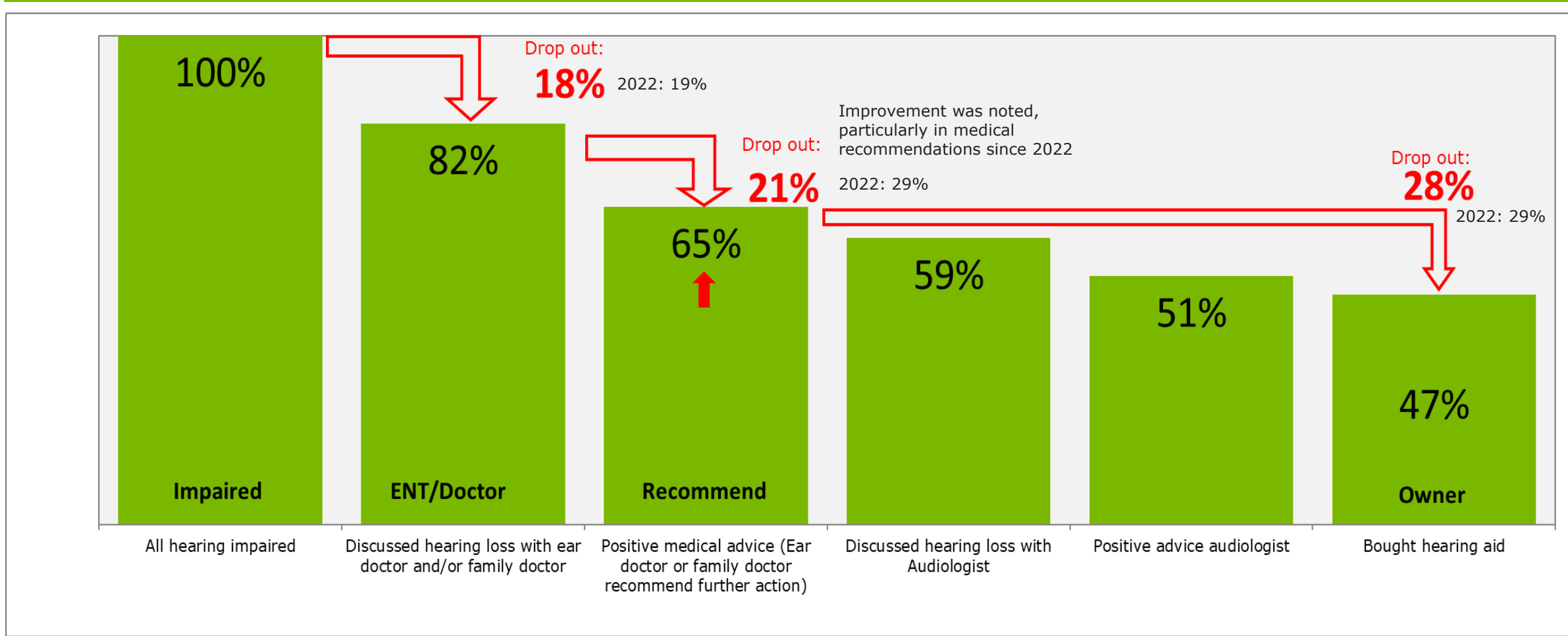
Usage of hearing protection by hearing impaired

Do you use hearing protection at least occasionally?



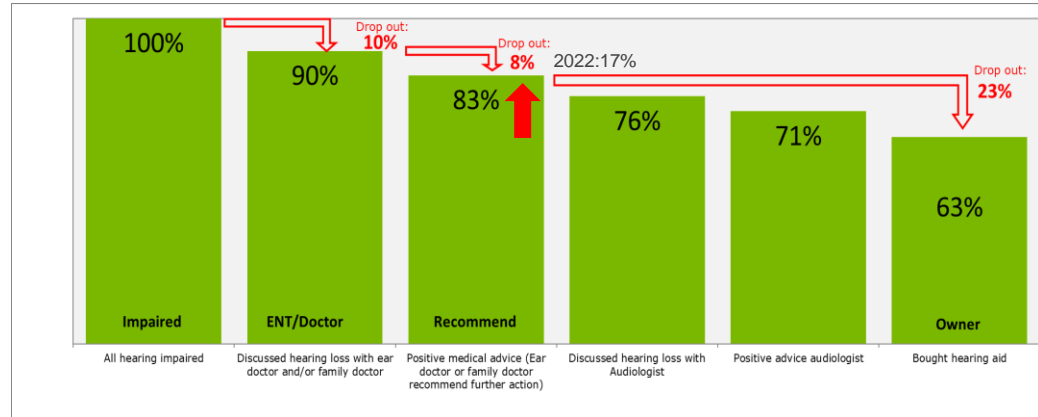


The route to the hearing aid



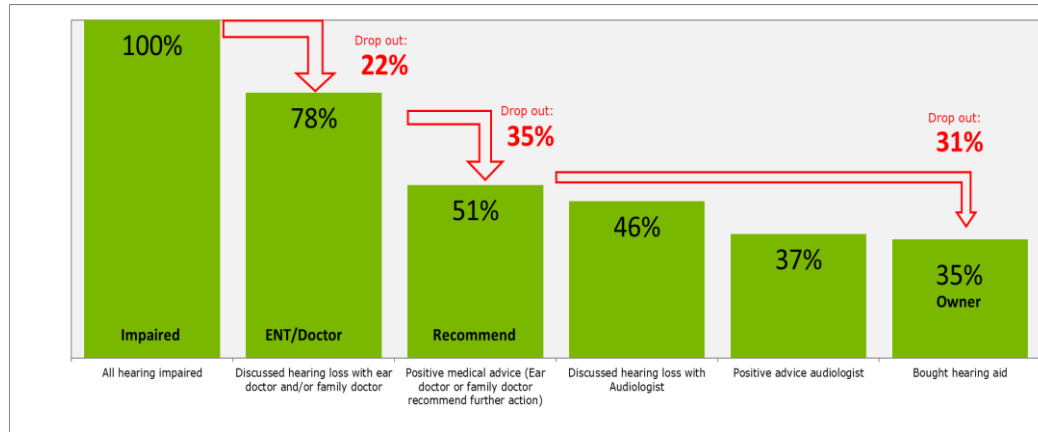
Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*



Improvement was noted, particularly in medical recommendations for more severe hearing loss since 2022

Low 50% hearing loss*



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

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

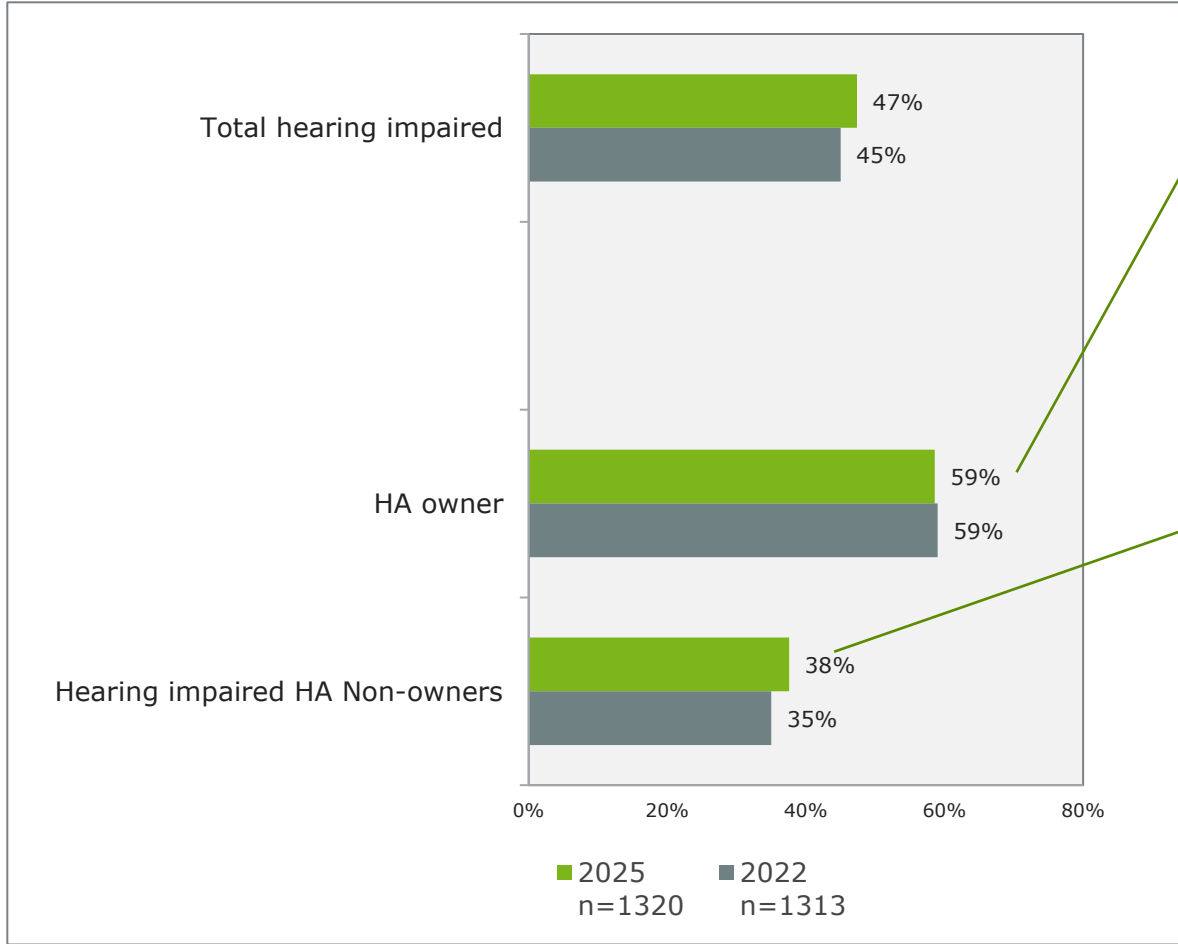




The route to the hearing aid: GP/Family doctor

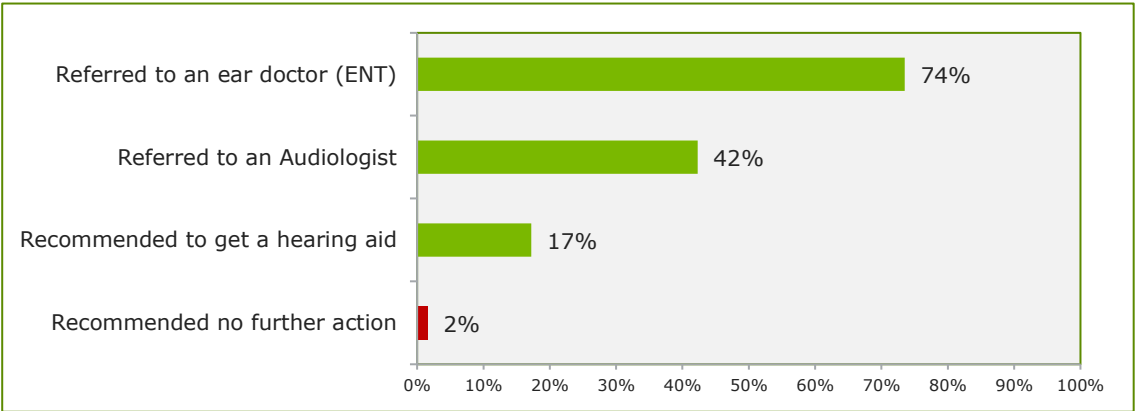
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

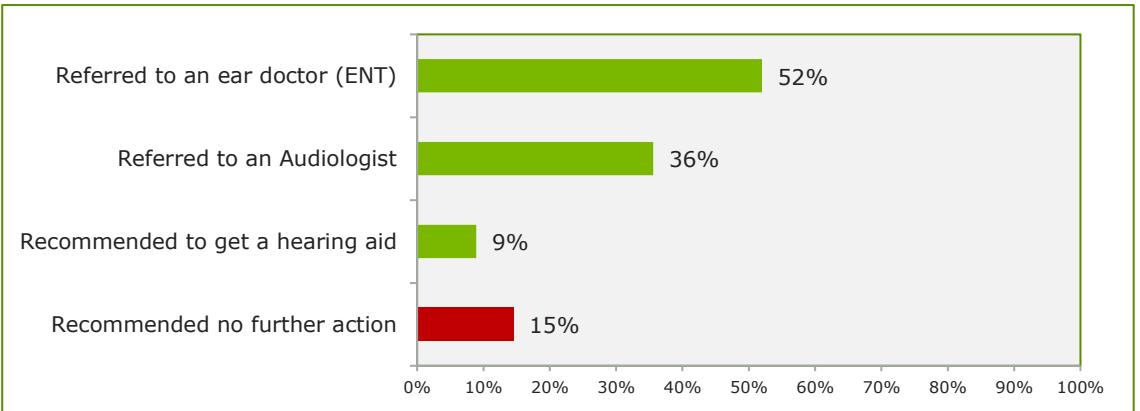


What did he/she recommend ?

HA Owner (n=363)



Impaired HA Non-owner (n=241)

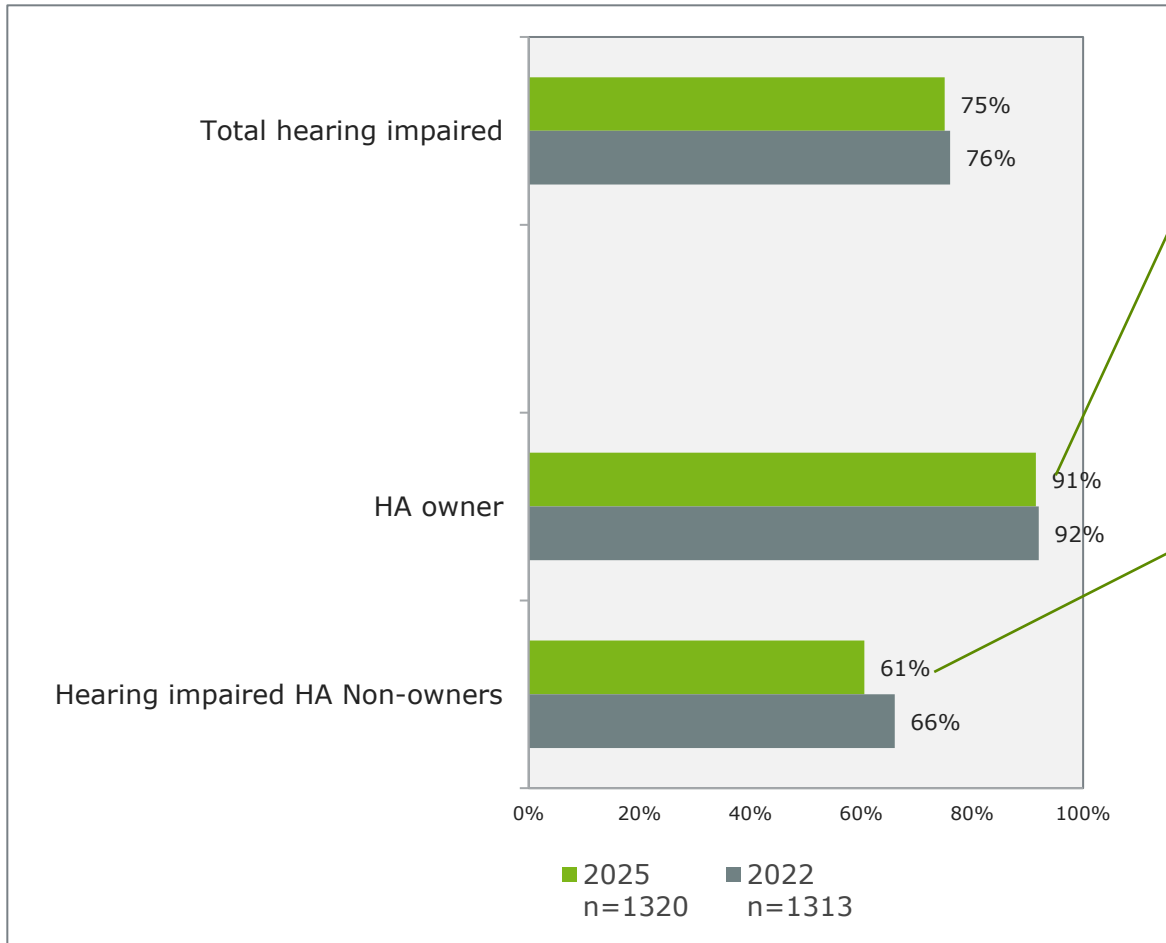




The route to the hearing aid: ENT

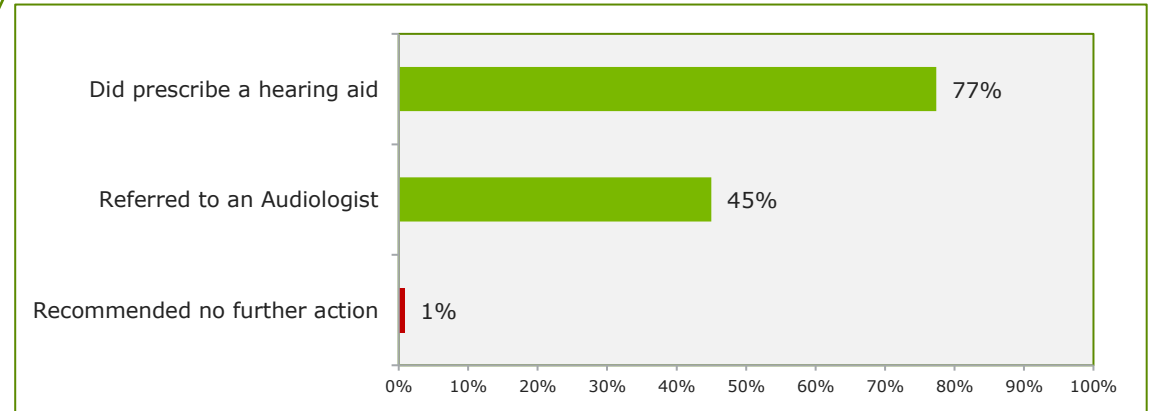
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

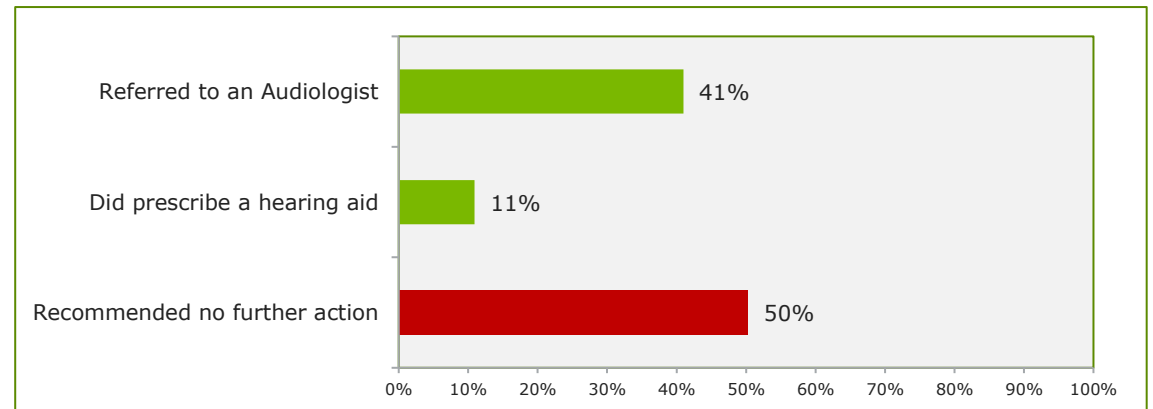


What did he/she recommend ?

HA Owner (n=604)



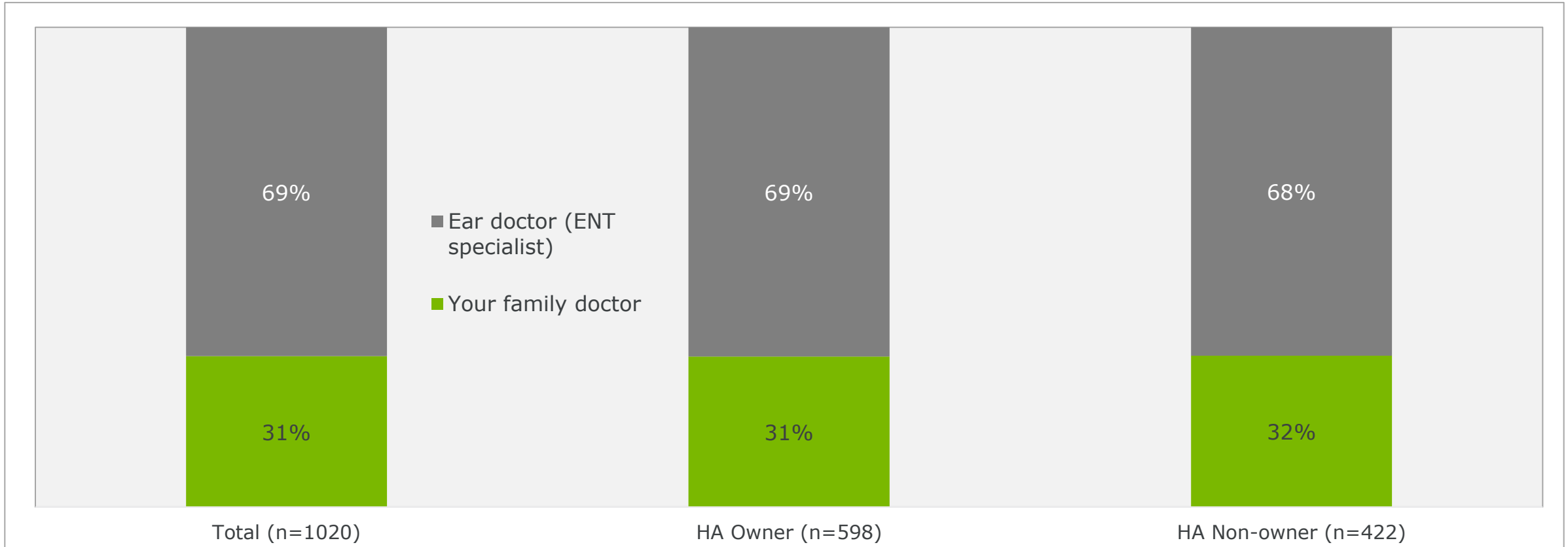
Impaired HA Non-owner (n=392)





Of those who discussed the hearing loss with a doctor, 31% spoke to a GP/family doctor first, and 69% talked to an ear doctor (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)?

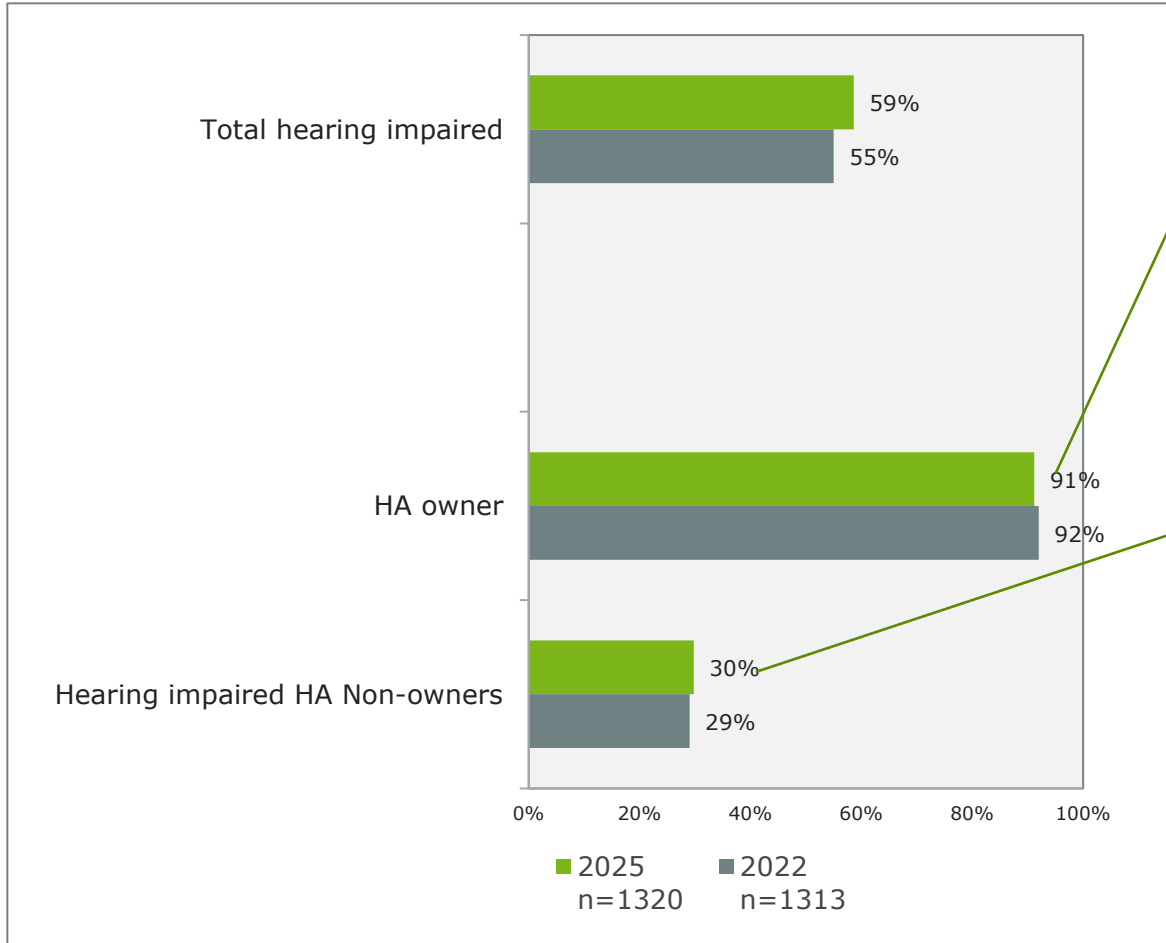




The route to the hearing aid: Audiologist

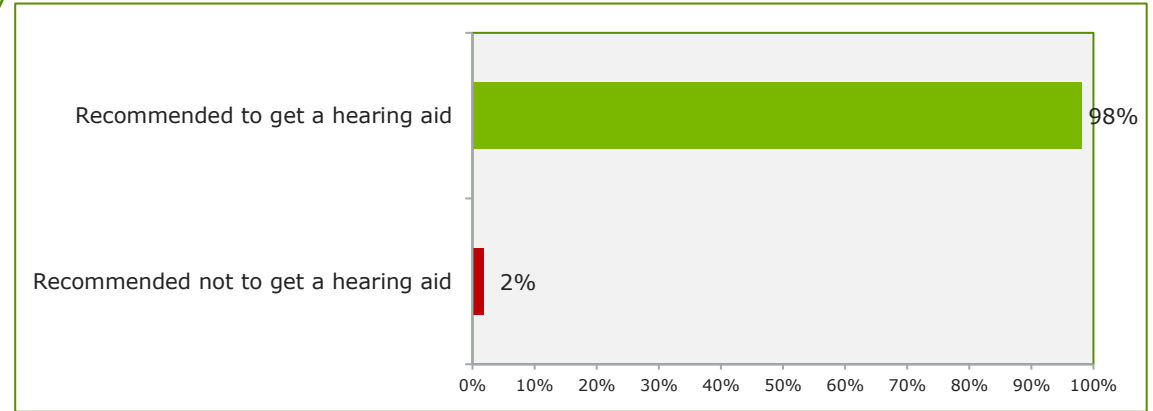
Have you ever discussed your hearing problem with an Audiologist?

% Discussed with Audiologist

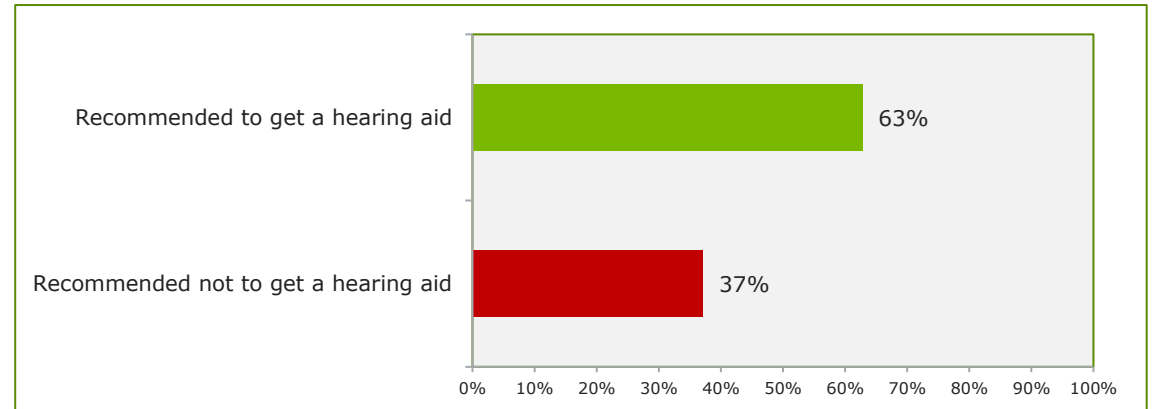


What did he/she recommend ?

HA Owner (n=604)

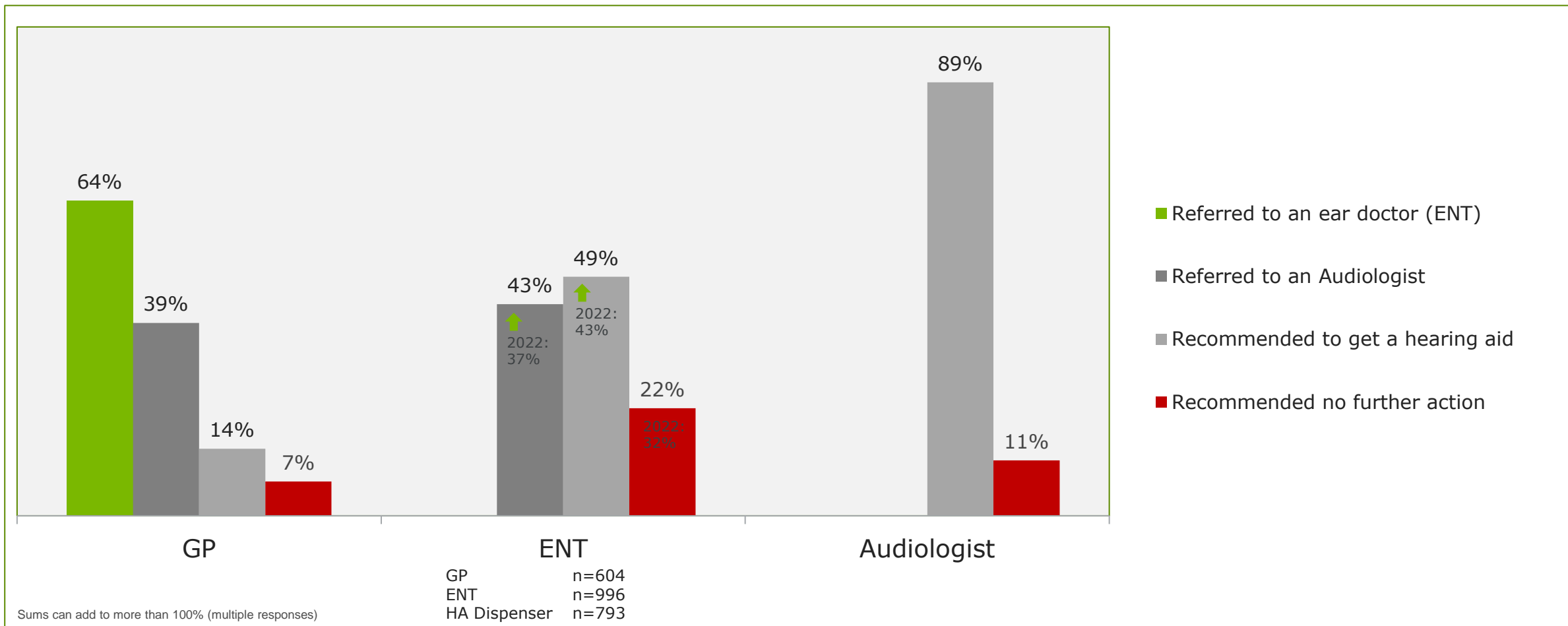


Impaired HA Non-owner (n=189)





Recommendations by profession

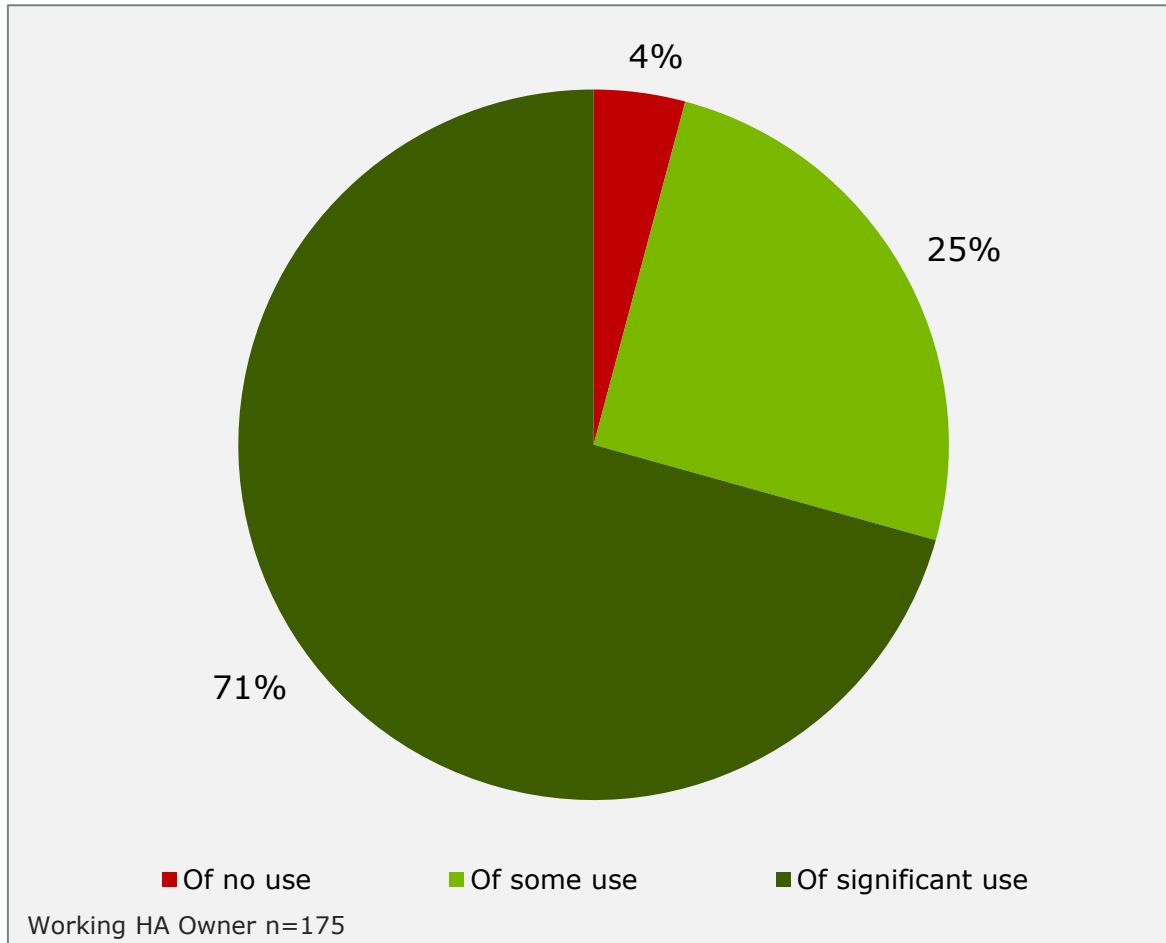


Potential social cost-savings due to the use of hearing aids:

Work competitiveness, depressive symptoms, sleep quality, co-morbidities

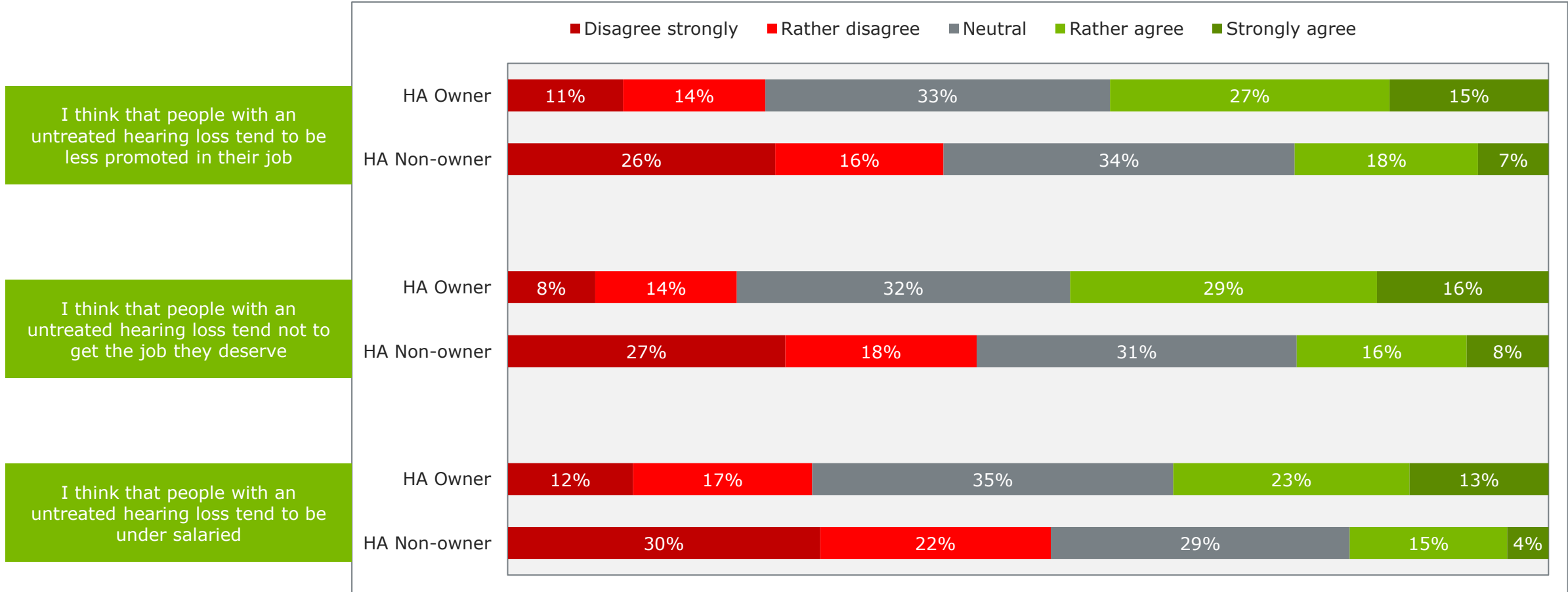
Work competitiveness: 96% of the working hearing aid owners state that their hearing aid(s) are useful on their job

How useful are your hearing aids on your job?





Work competitiveness: People with hearing aids recognize that hearing aids increase the chance of hearing impaired getting promoted, getting the right job and to get a higher salary



HA Owner n=495 / HA Non-owner n=510

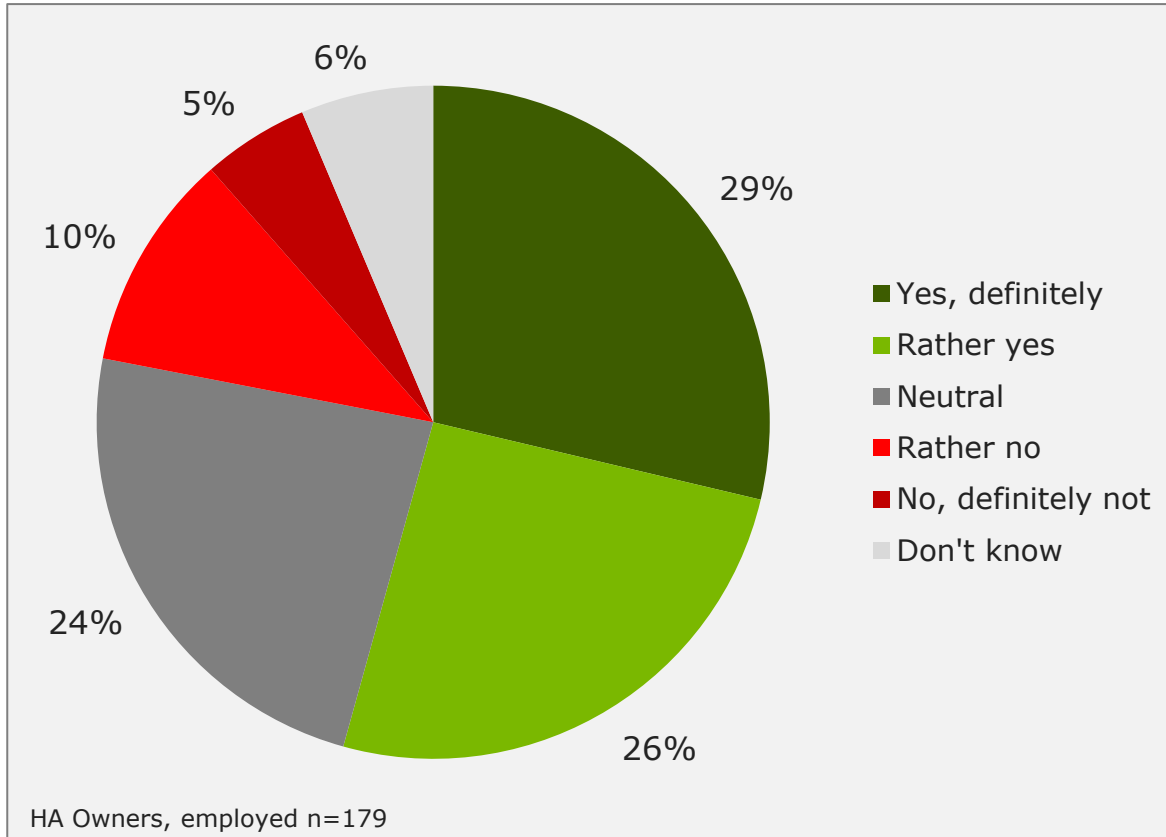




55% of employed individuals using hearing aids believe the devices enable them to work longer

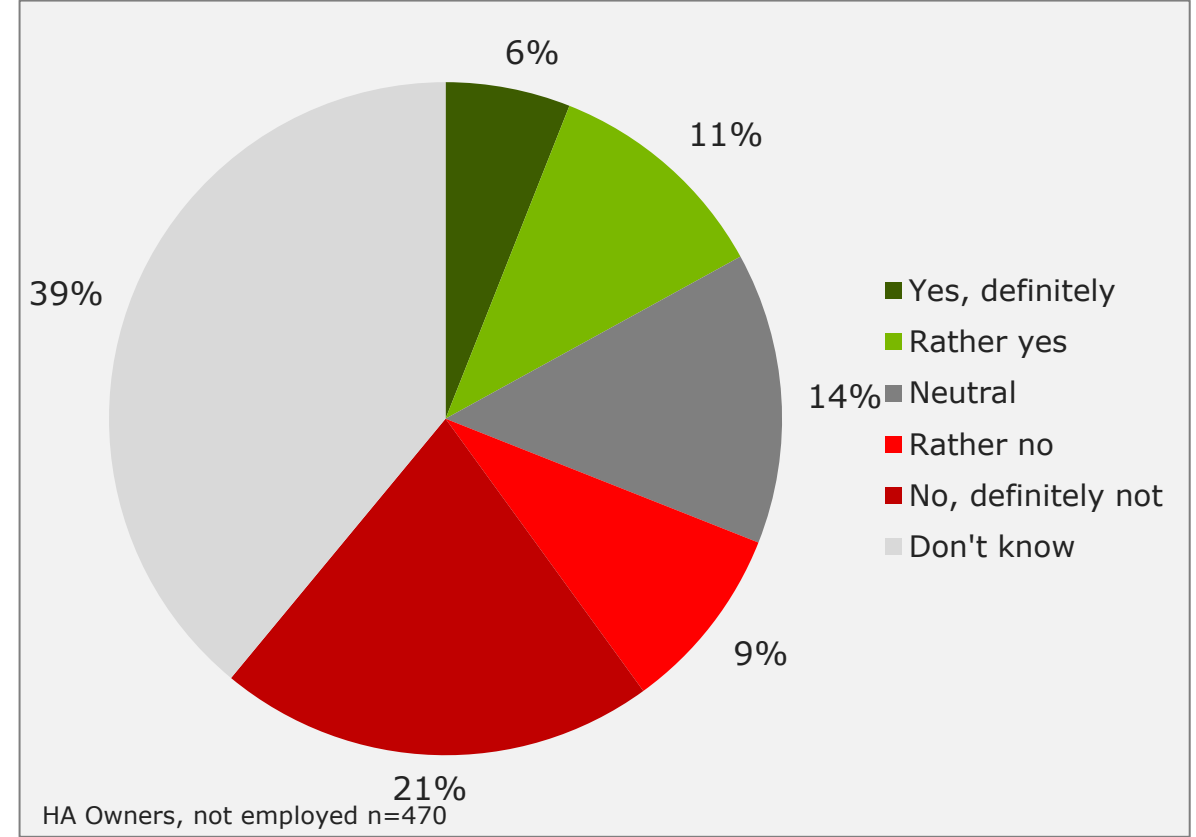
HA Owners, employed:

Do you believe that due to your hearing aid provision you can be employed longer than without hearing aid(s)?



HA Owners, NOT employed :

Do you believe that due to your hearing aid provision you could have been employed longer than without hearing aid(s)?





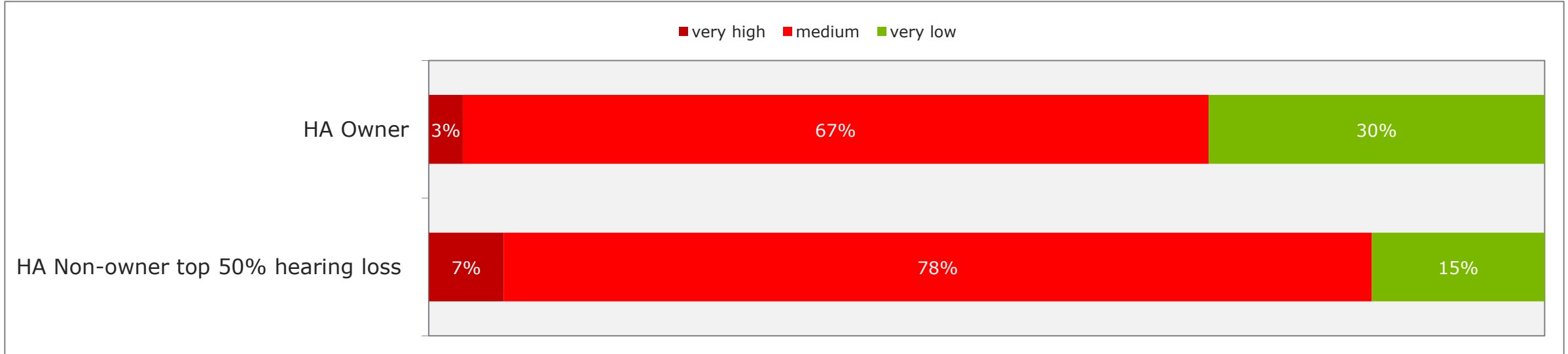
General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*)

Depression symptoms:
PHQ-2 Screening:

In the last 2 weeks:

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

Probability of major depressive disorder



HA owner n=489 / HA Non-owner top 50% hearing loss n=140

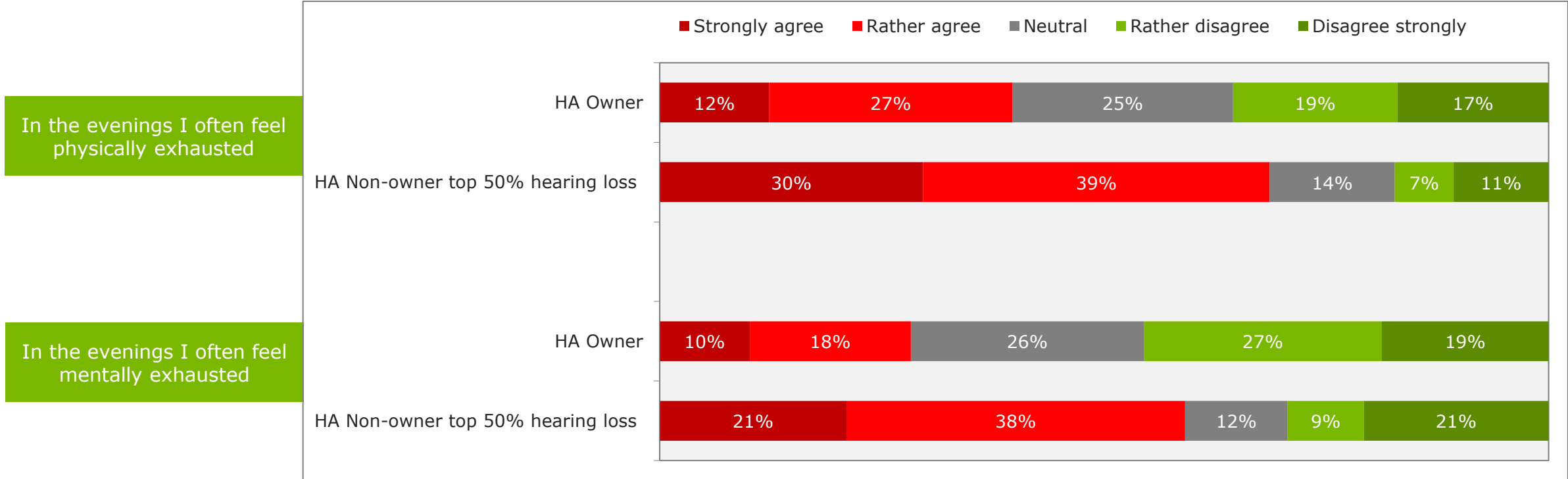
*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- 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



HA Owner n=483 / HA Non-owner top 50% hearing loss n=139

*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:

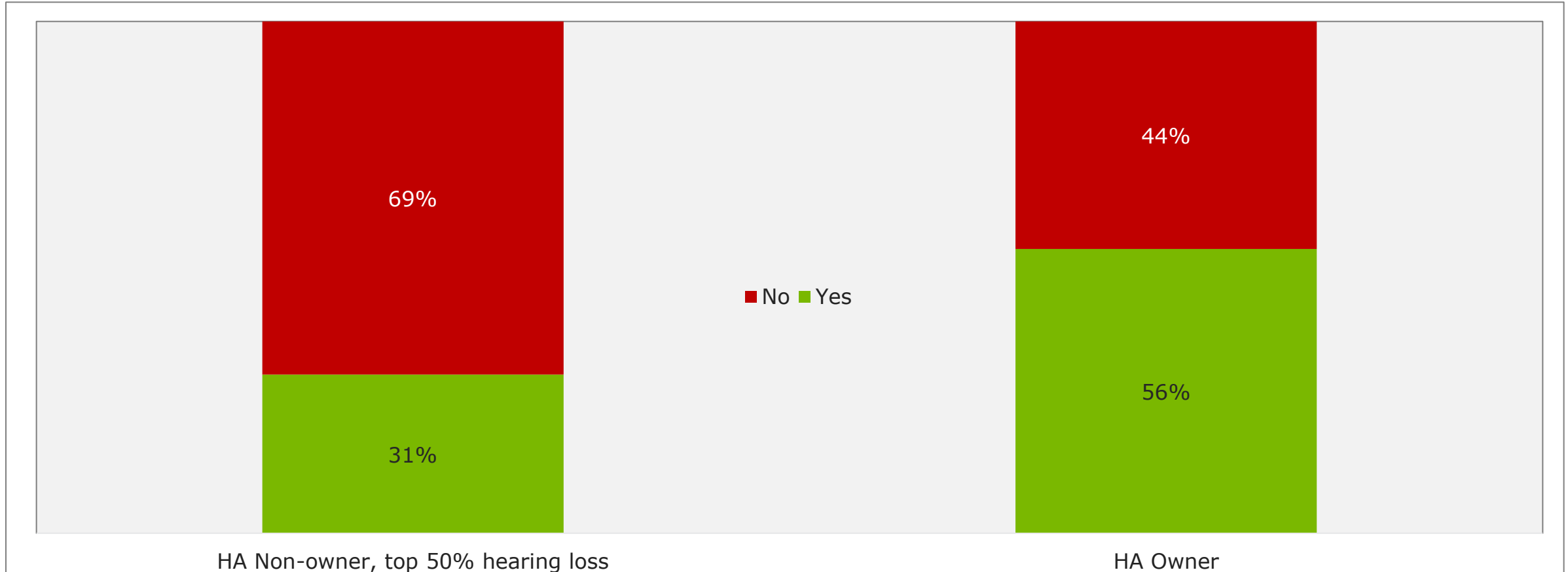
- Number of ears impaired (one or two)
 - Stated hearing loss (Mild to Profound)
 - Scores on 6 APHAB-EC - like questions (Scaled 1-5)
 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67%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

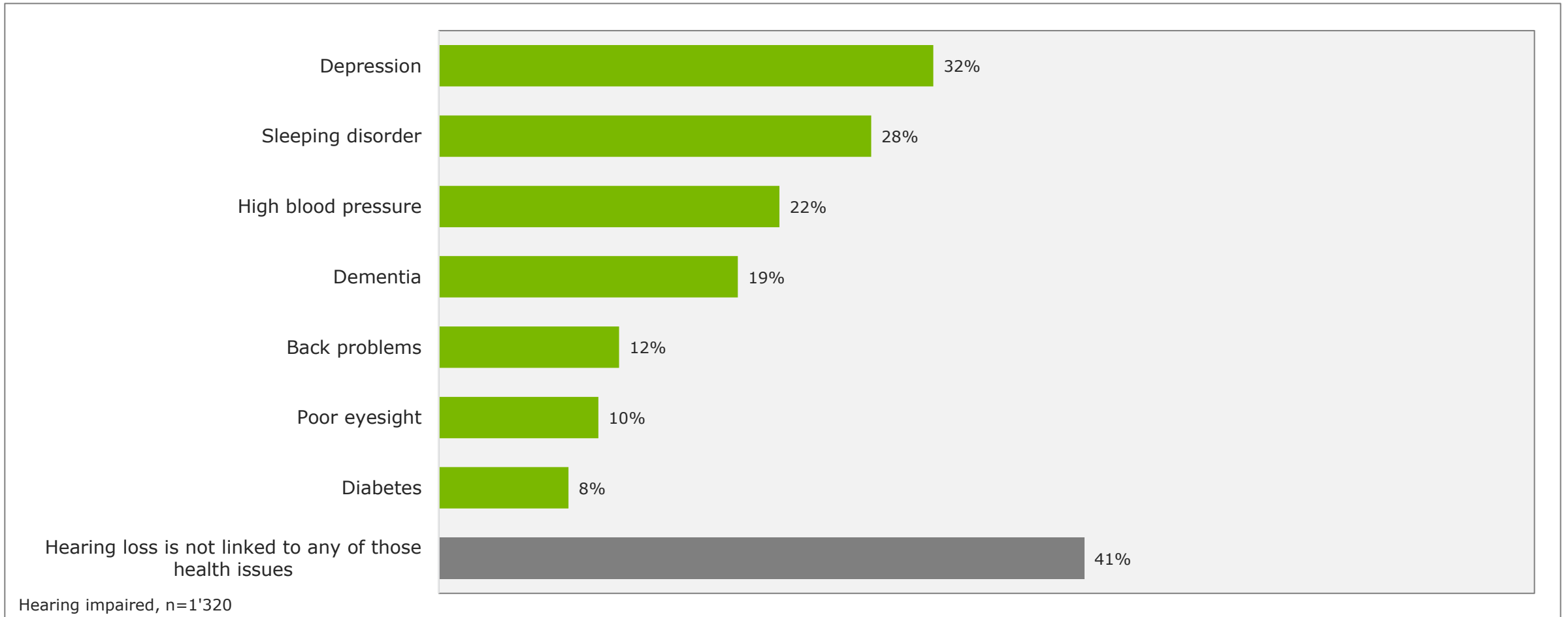


HA Non-owner top 50% hearing loss n=140 / HA Owner n=489



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=1'320





3. Analysis of hearing aid owners



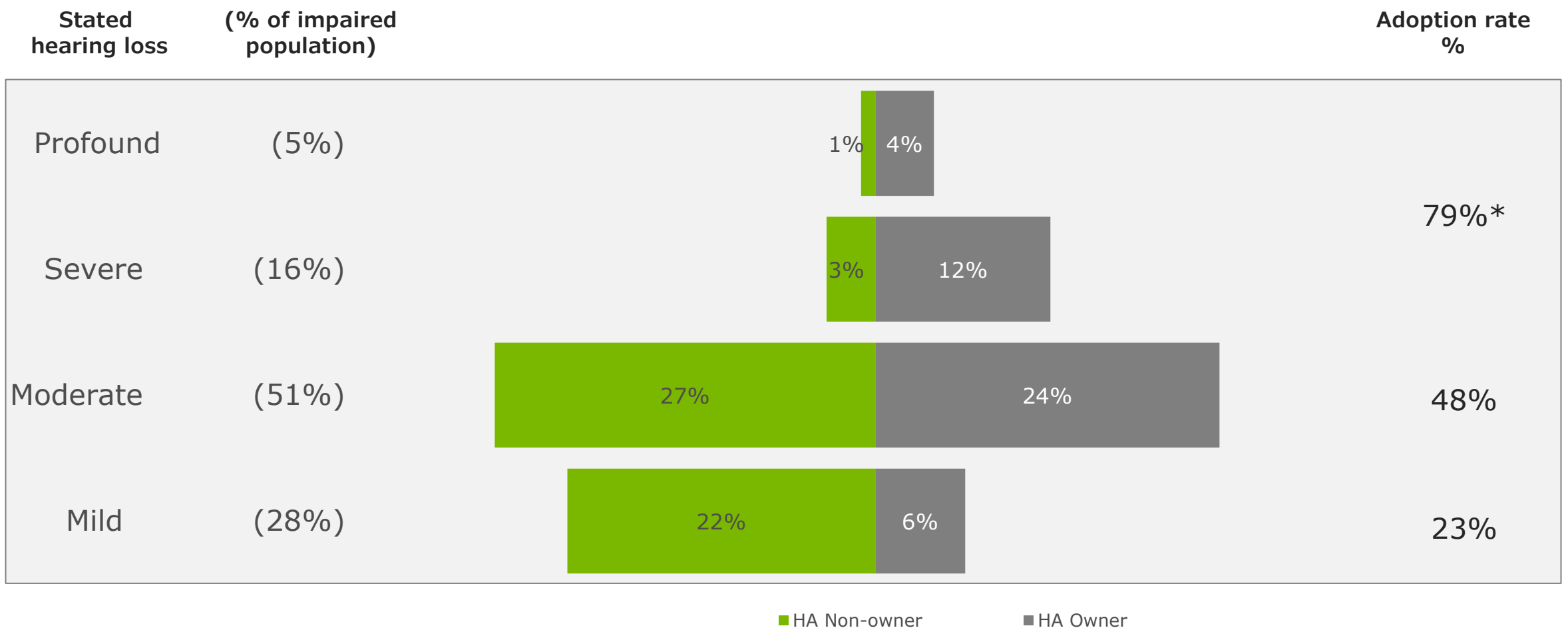


Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage





Low adoption rates within mild hearing loss



n=1'320

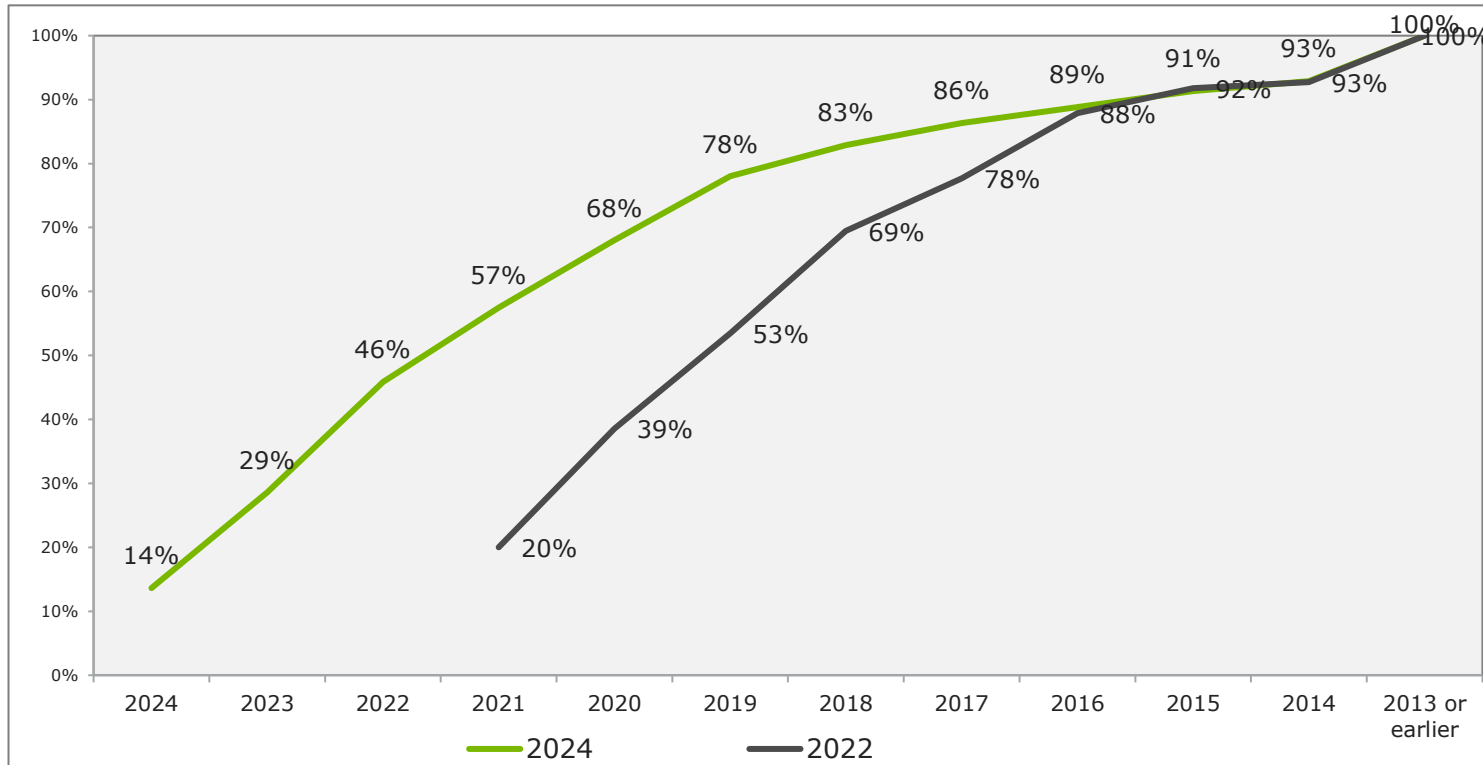
Sums can differ from 100% due to rounding
 * combined "severe" and "profound" because n is too small





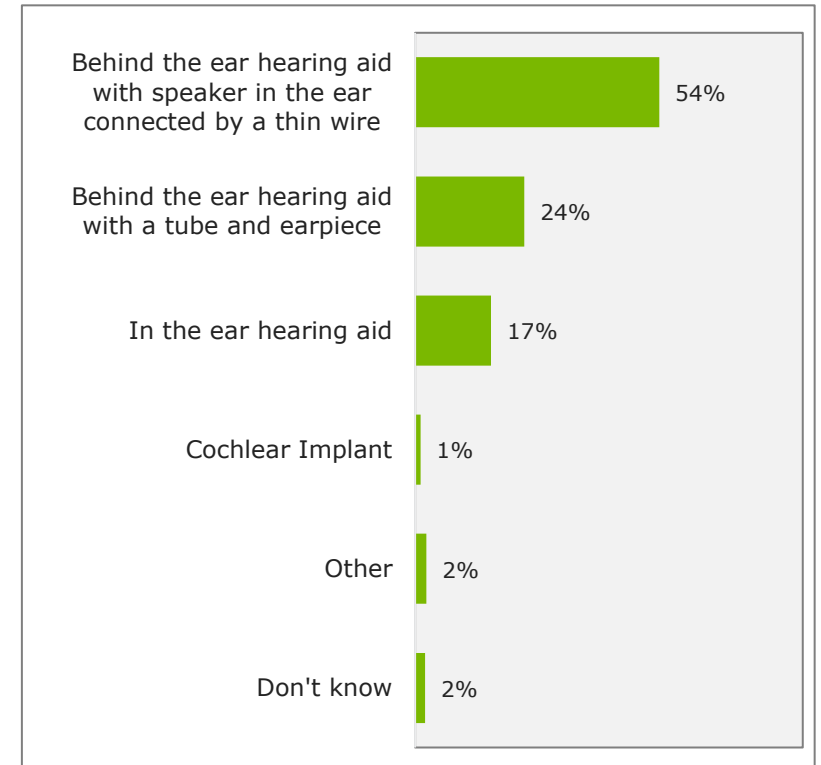
46% of the currently owned HAs were acquired in 2022 or later: RICs are the most often purchased type of HA

Year of purchase



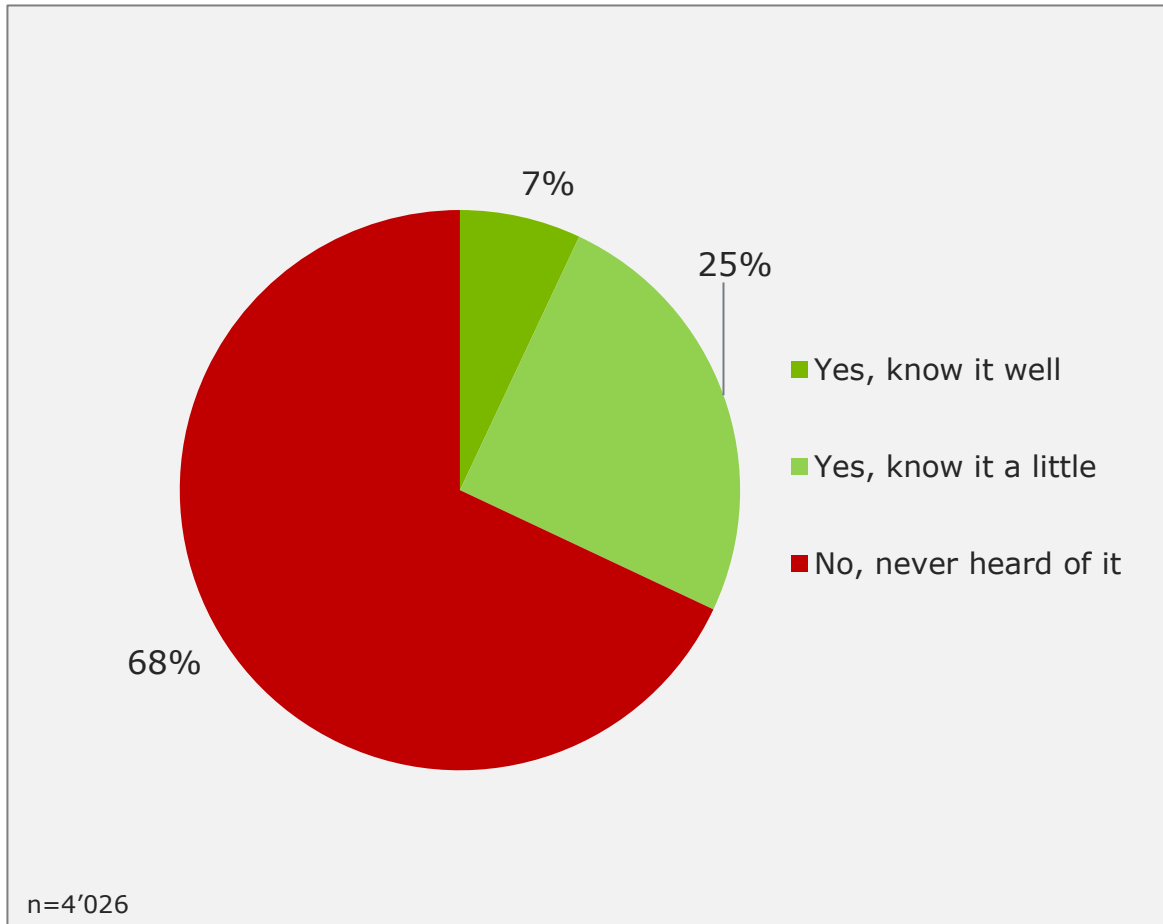
Age of currently owned HAs (Mean):
2025: 4.0 years
2022: 3.4 years

Type of HA

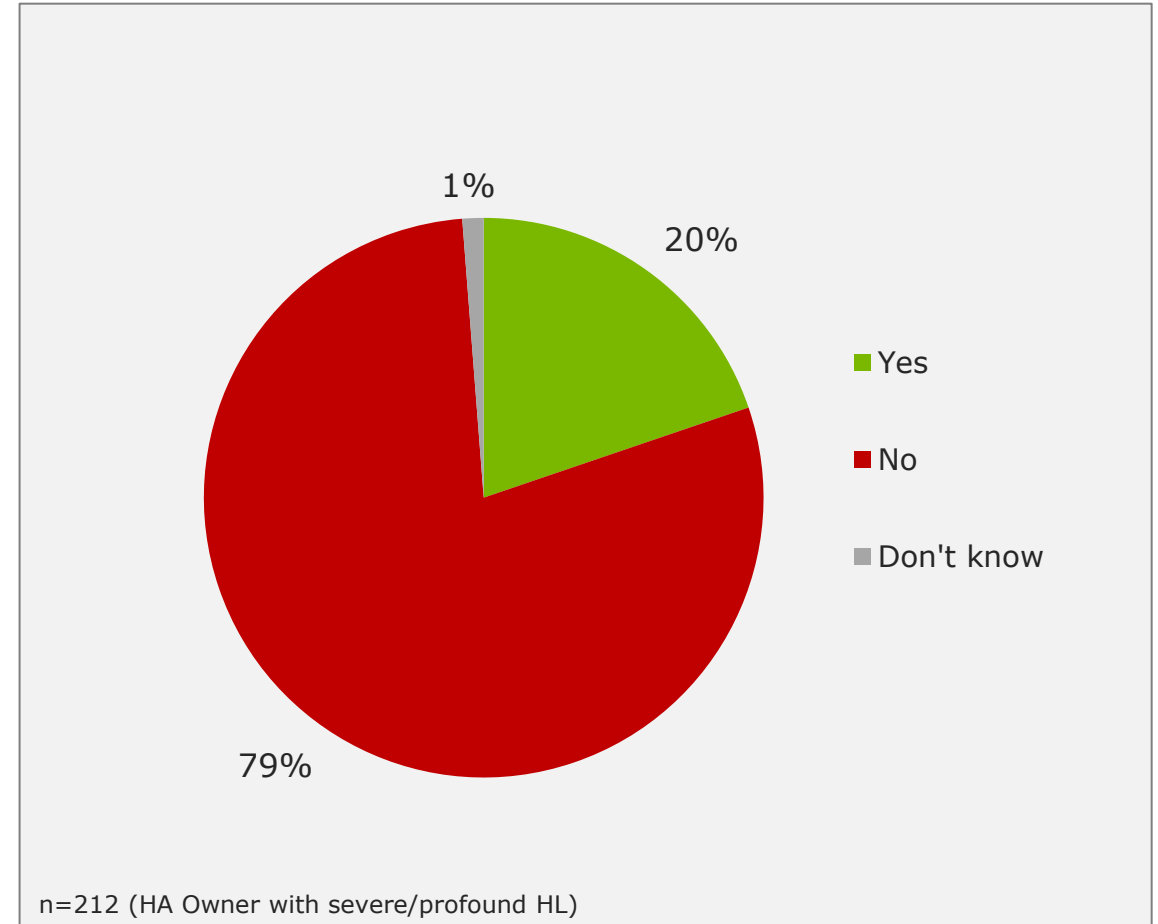


**68% of the population in GER have never heard of Cochlear Implants.
20% of the HA owners with severe/profound HL have been informed about CIs by a medical professional**

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



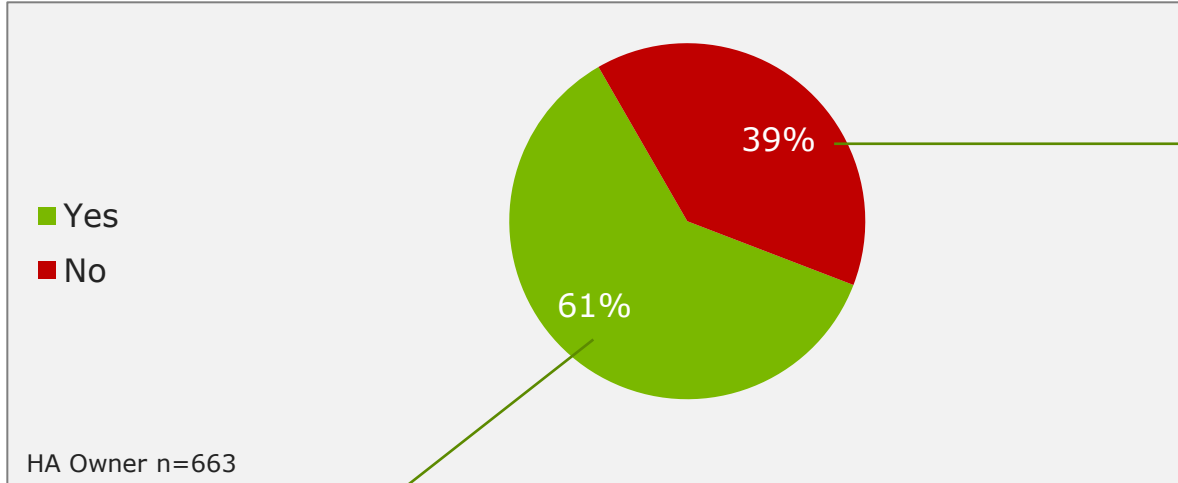
Have you been informed about cochlear implants by a medical professional?





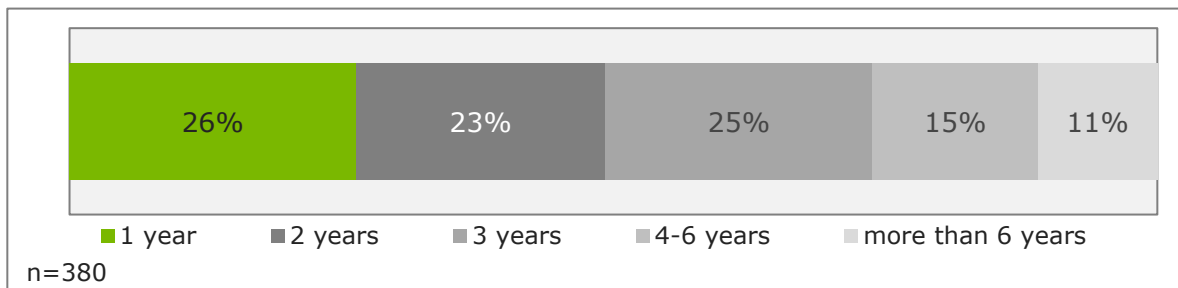
Hearing aids are used for six years before they are replaced. Mostly below three years pass between becoming aware of the hearing loss and purchasing hearing aids

Current HAs = first HAs?

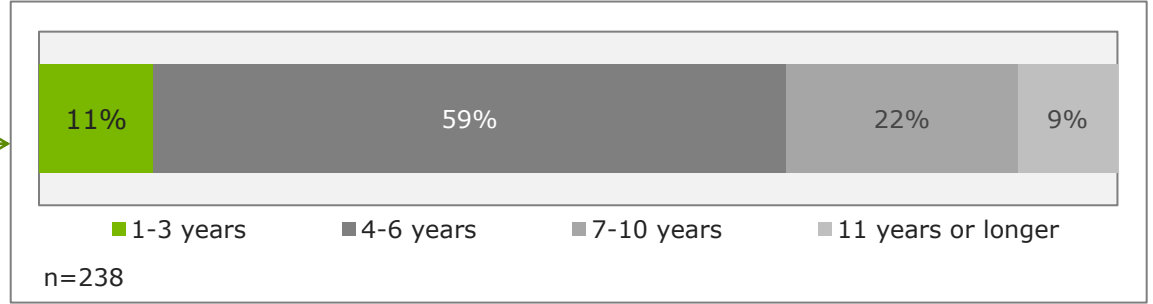


HA Owner (1st HA):

How many years have passed since you became aware of your hearing loss until you acquired a hearing aid?



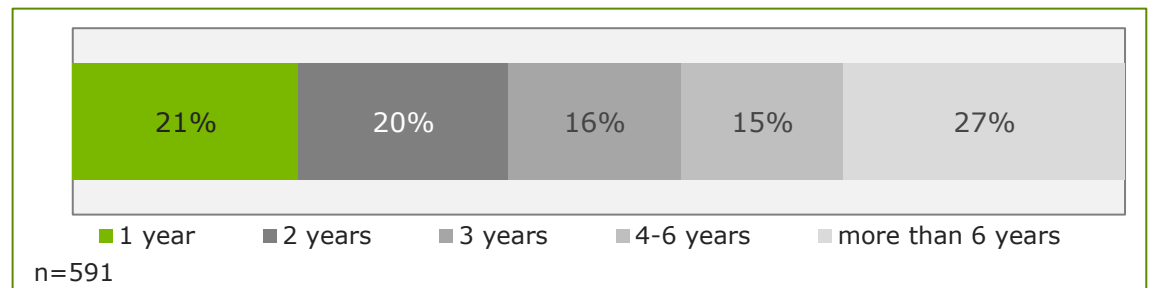
How many years did you own your previous HAs?



Age of HA before it has been replaced:
2025: 6 years (median)
2022: 6 years (median)

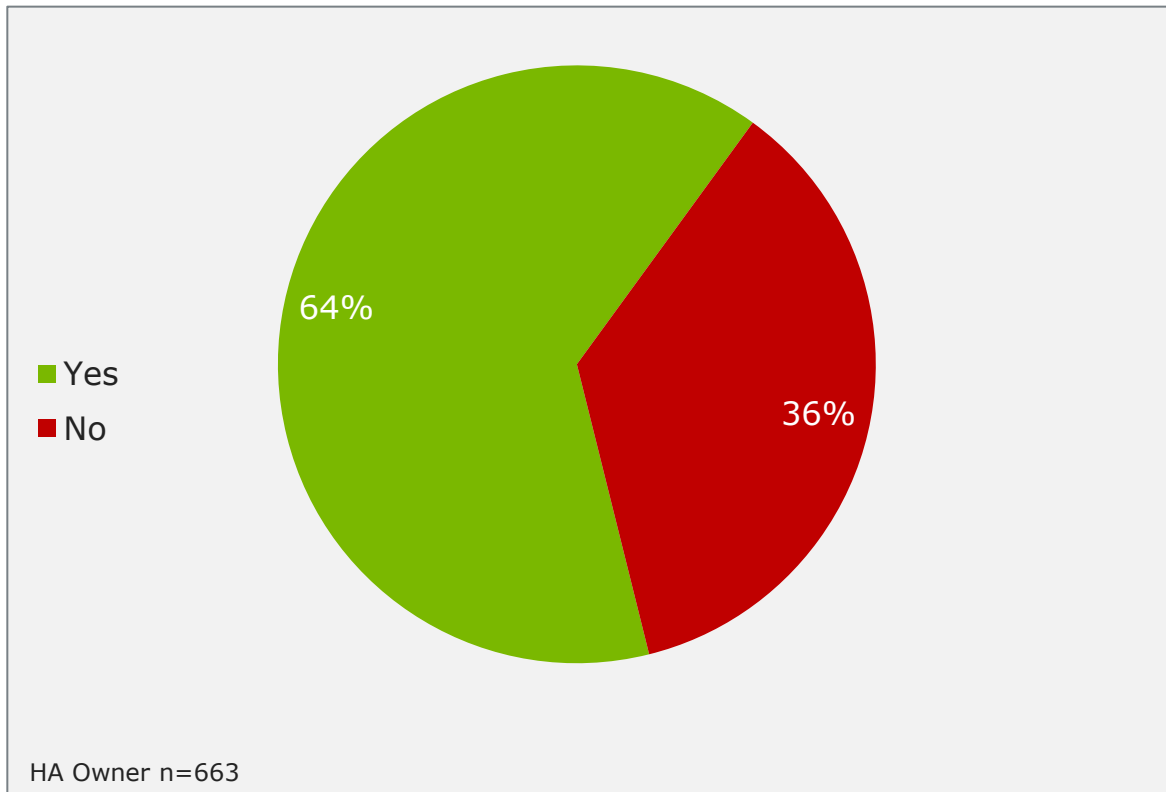
HA Non-owner:

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



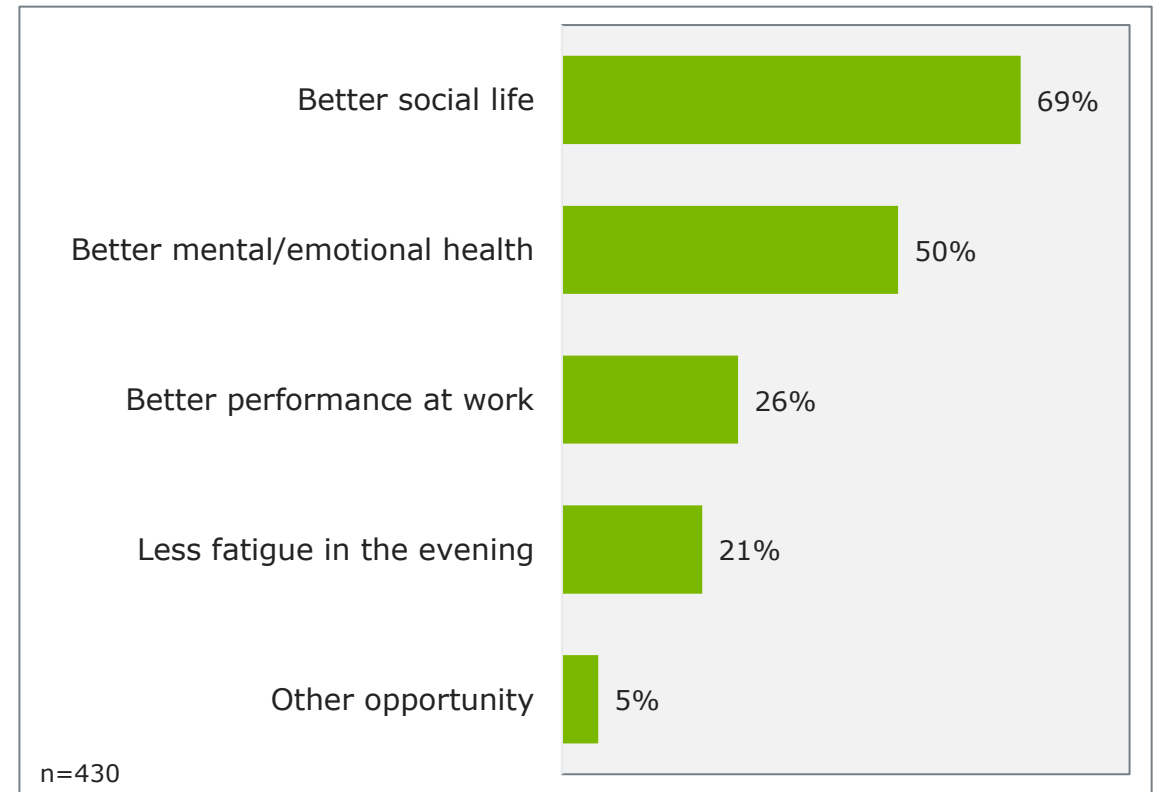
64% of all HA owners think they should have gotten their HAs sooner! The main reason is missing out on social life and mental/emotional health

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



IF YES:

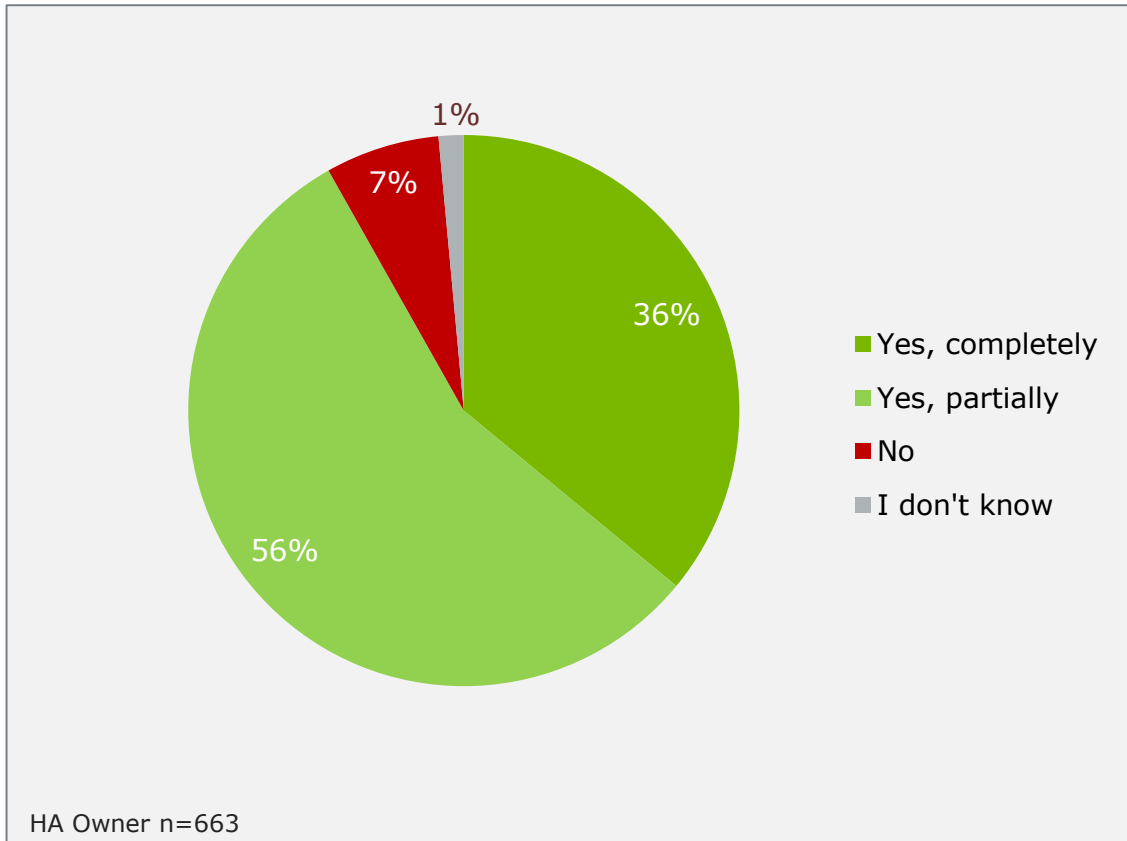
What are the reasons why you think you should have gotten your hearing aid(s) sooner? What are the opportunities you think you have missed because of this? Please tick all that apply.



**92% claimed some 3rd party reimbursement.
Only 37% of the hearing impaired without hearing aids think that a third party would pay for any part of hearing aids**

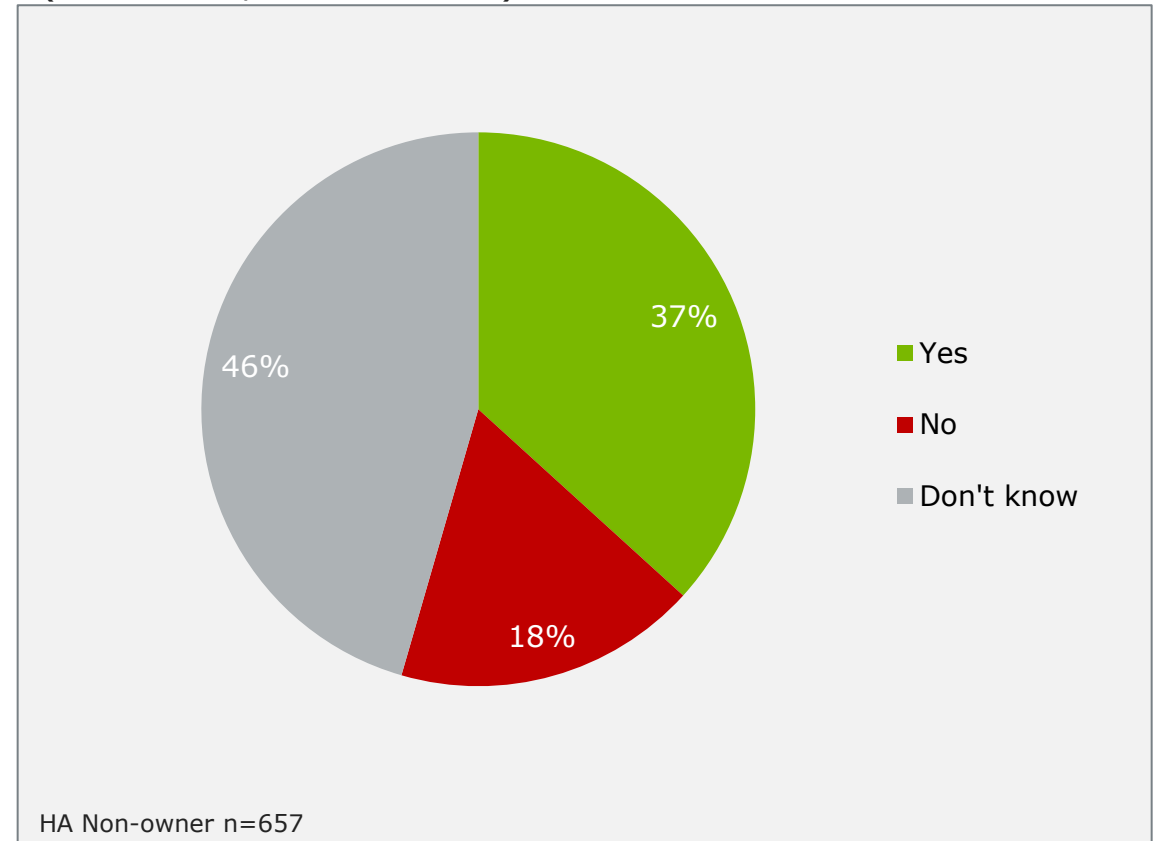
HA Owner:

Has your hearing aid been fully or partially paid for by a third party organization? (Insurance, Government)



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)

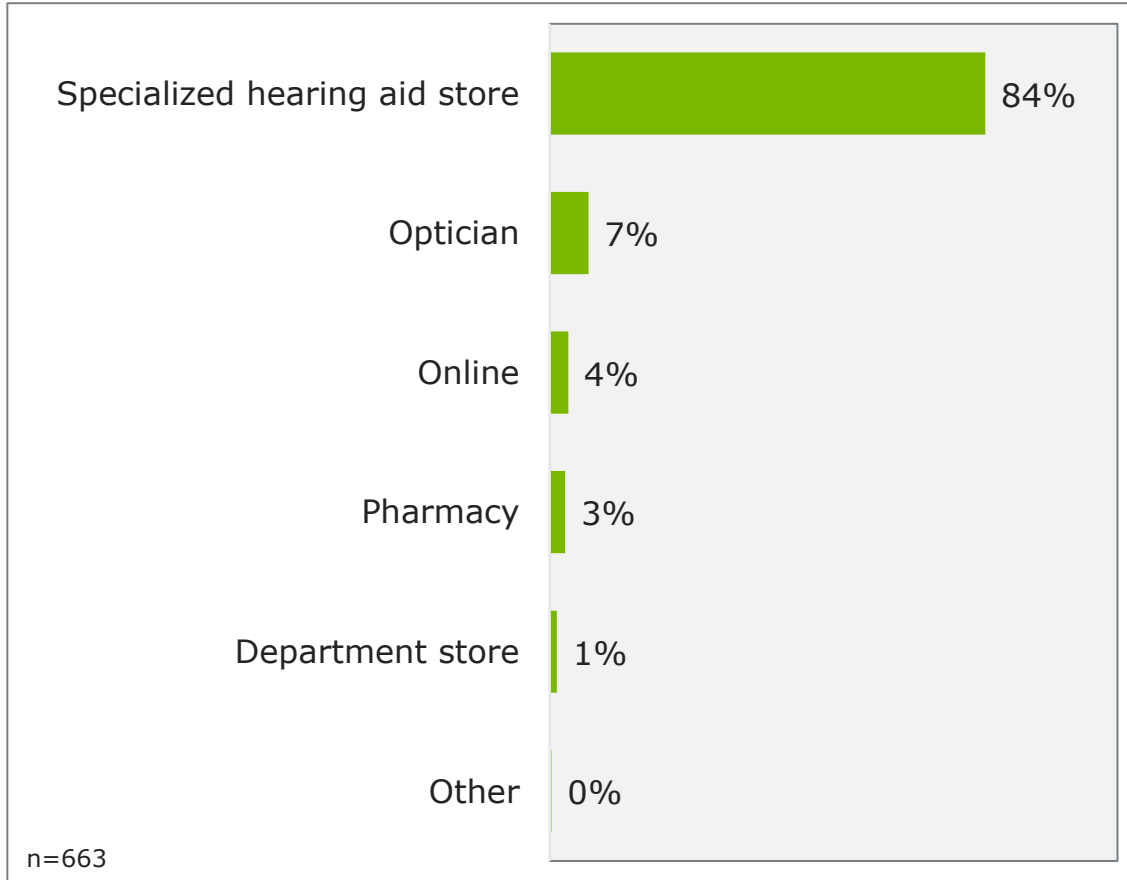




A specialized hearing aid store is the preferred place for obtaining hearing aids (both for owners and non-owners)

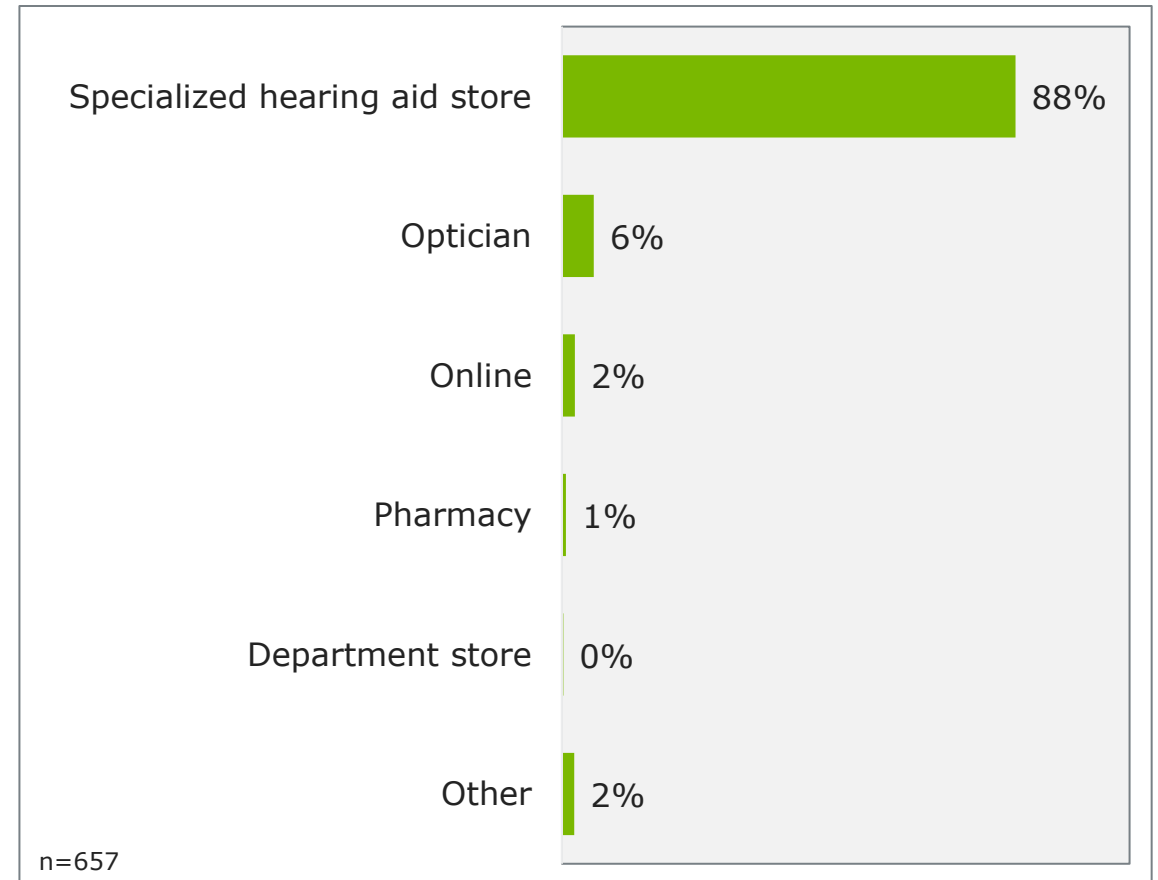
HA Owner:

Where was your most current hearing aid obtained?



HA Non-owner:

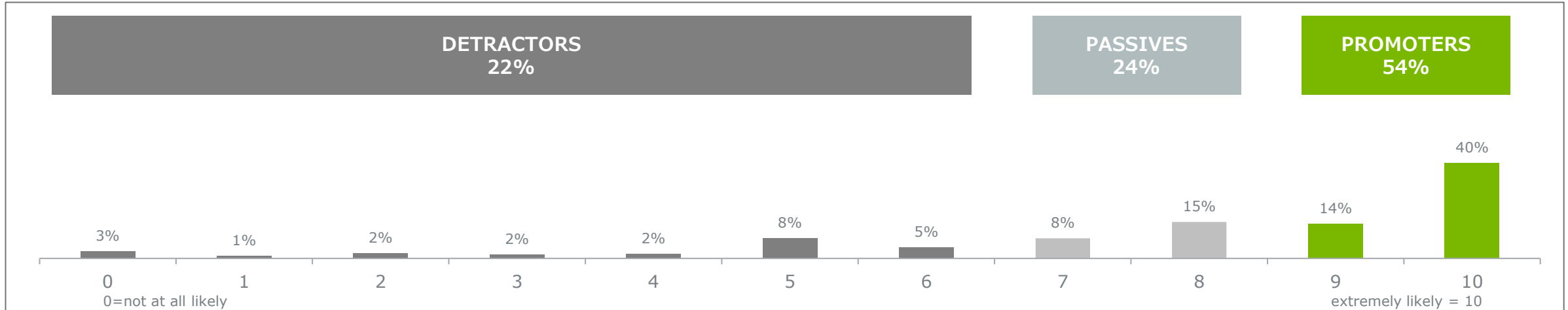
If you were to get hearing aids, where would you go?





Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 32

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



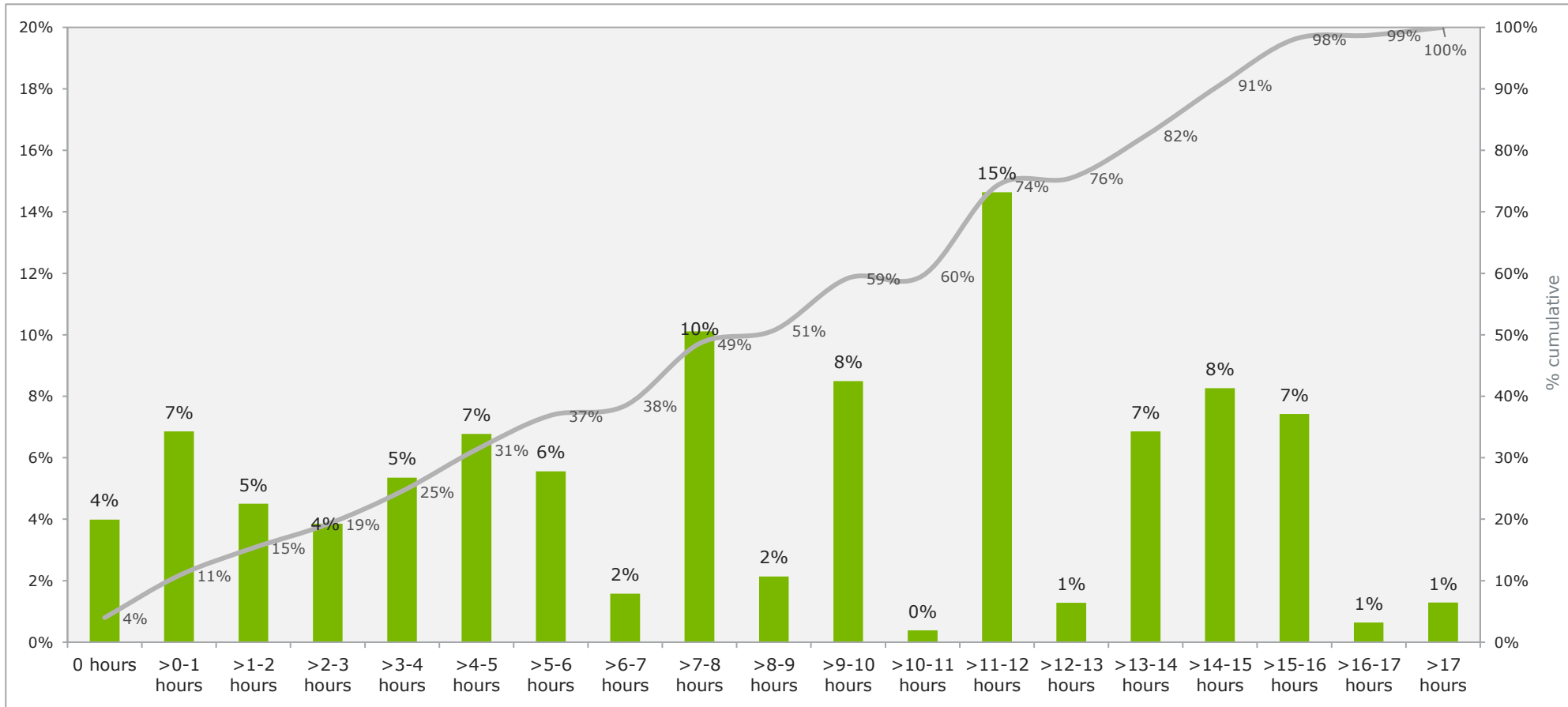
NPS = PROMOTERS – DETRACTORS = 32 (2022: 31) (exact figure rounded)





On average, HAs are worn 8.8 hours a day

How many hours a day are HA worn?



HA worn:
 2025 Mean: 8.8 hours/day
 2022 Mean: 8.9 hours/day

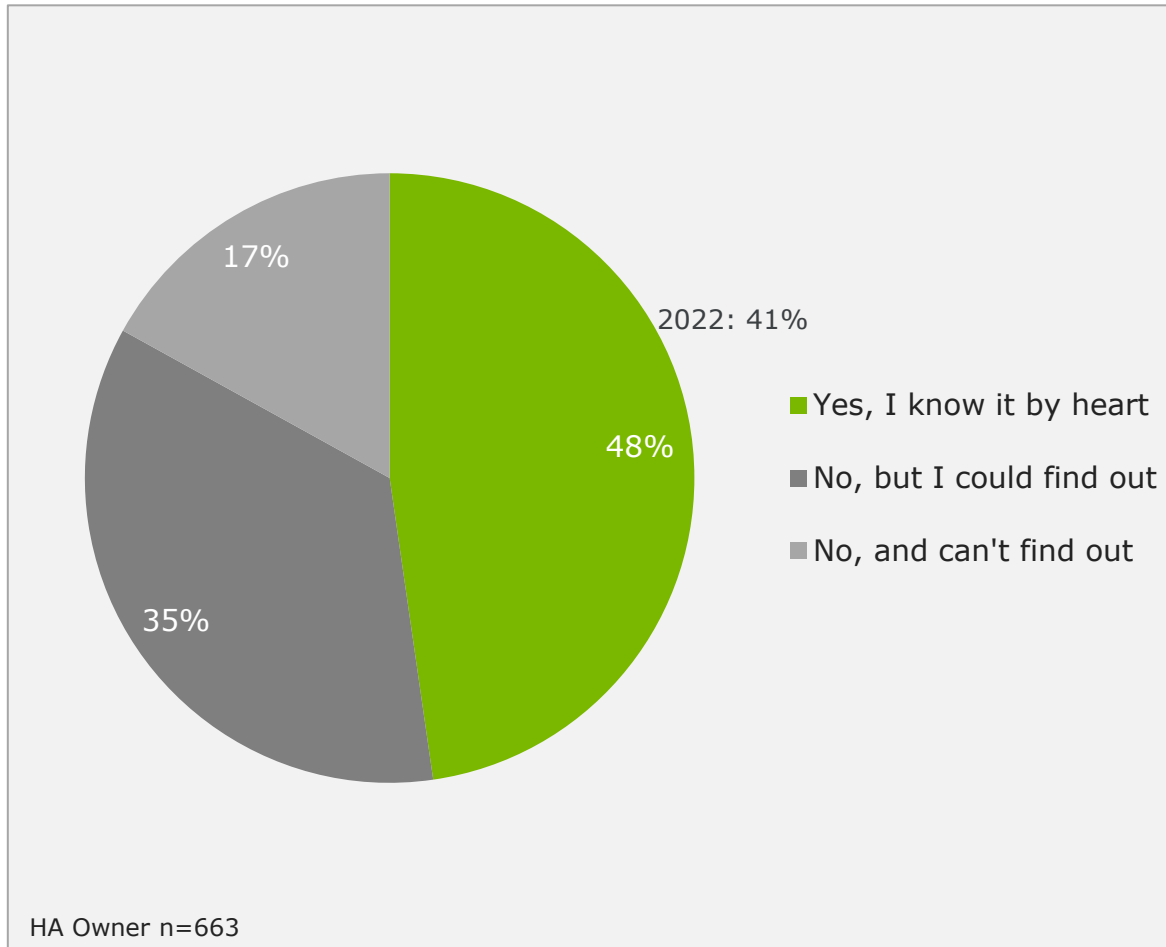
In the drawer (0 hours):
 2025: 4%
 2022: 5%

HA Owner n=663



48% of today's hearing aid owners are aware of their hearing aid brand – trend increasing

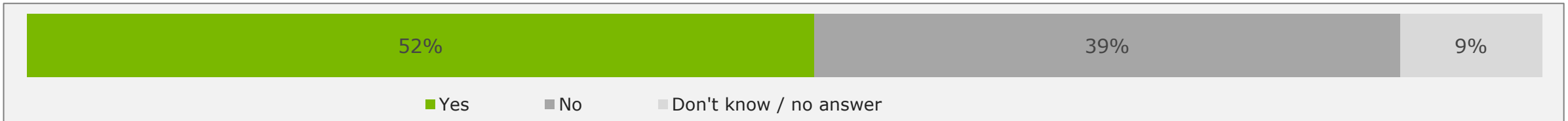
Are you aware of the brand of your hearing aid(s)?





35% of the HA owners use a hearing aid app (trend increasing (2022: 25%), and 80% are satisfied with it

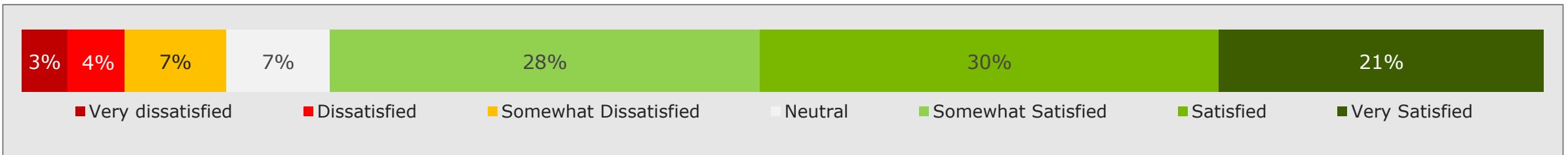
Have you been informed by your hearing care professional about hearing aid apps?
(HA Owner n=663)



Do you personally use apps for your hearing aids?
(HA Owner n=663)

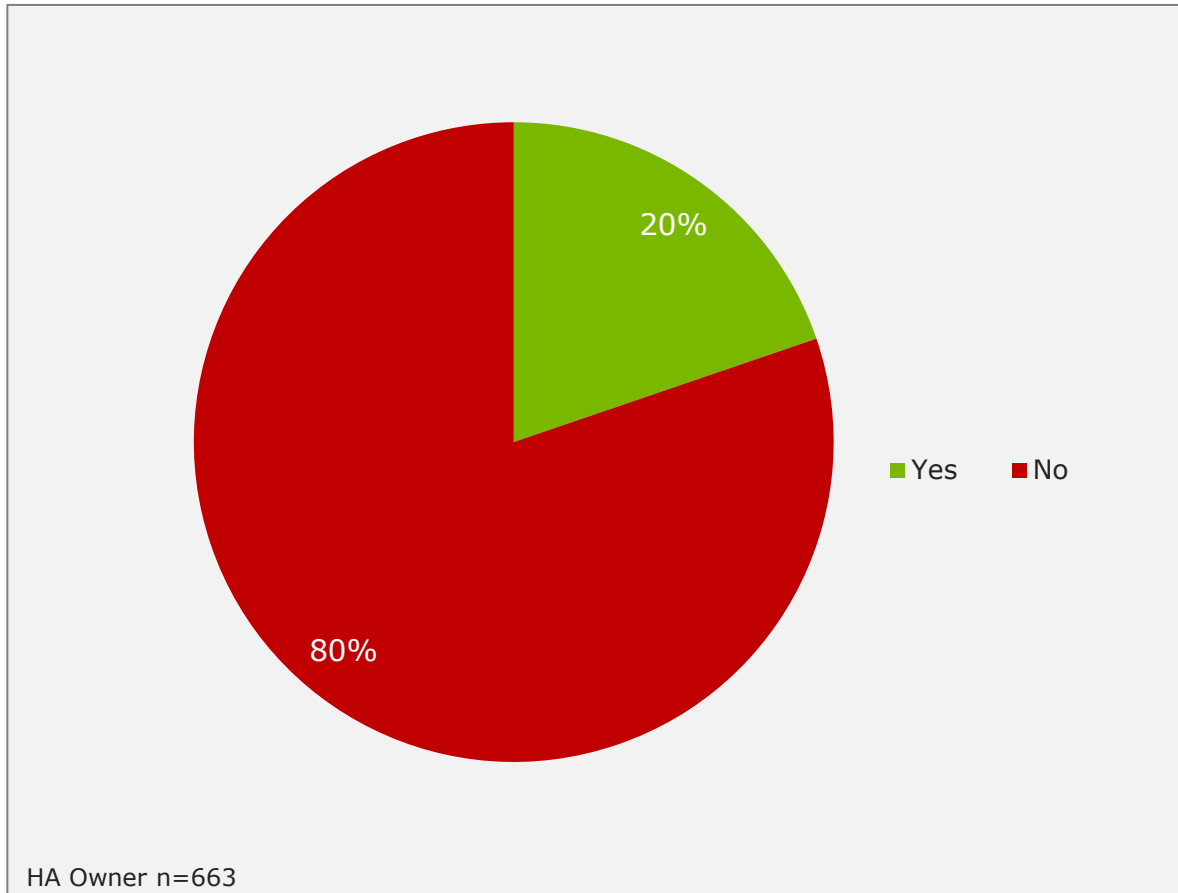


IF APPS USED (n=227):
Overall, how satisfied with the performance of your apps?

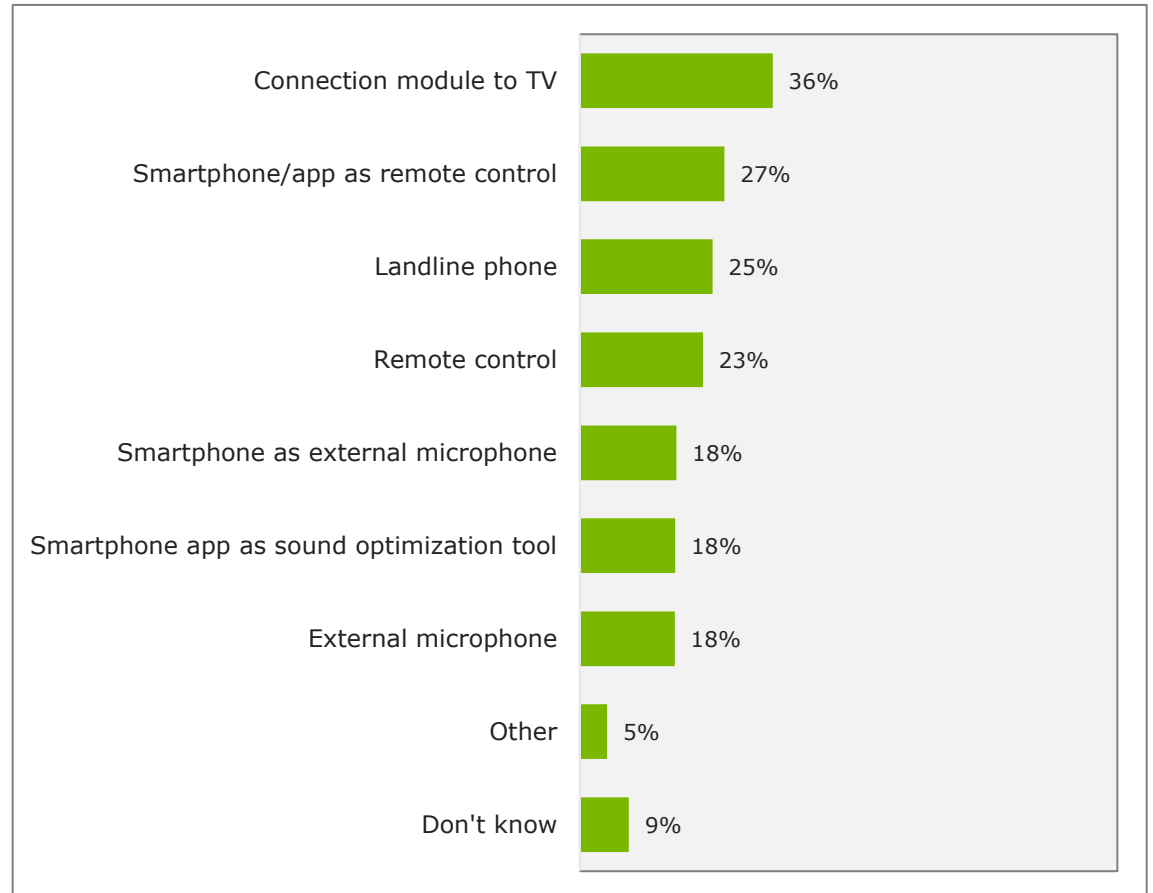


20% of the hearing aid owners use some kind of accessory for better speech understanding

Do you use accessories for your hearing aids for better speech understanding?



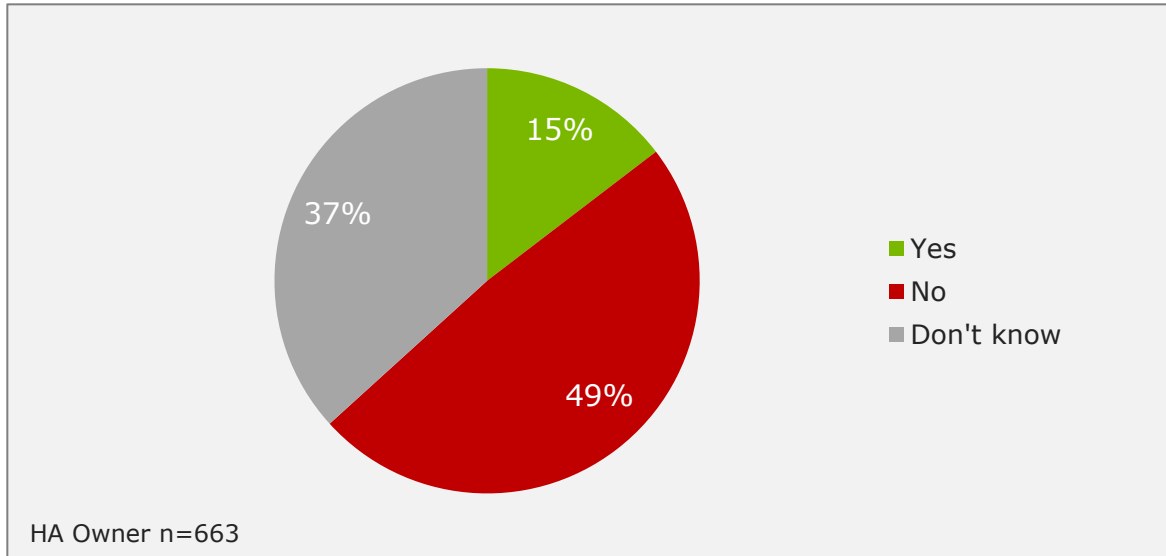
What accessories for for better speech understanding do you use with your hearing aids?



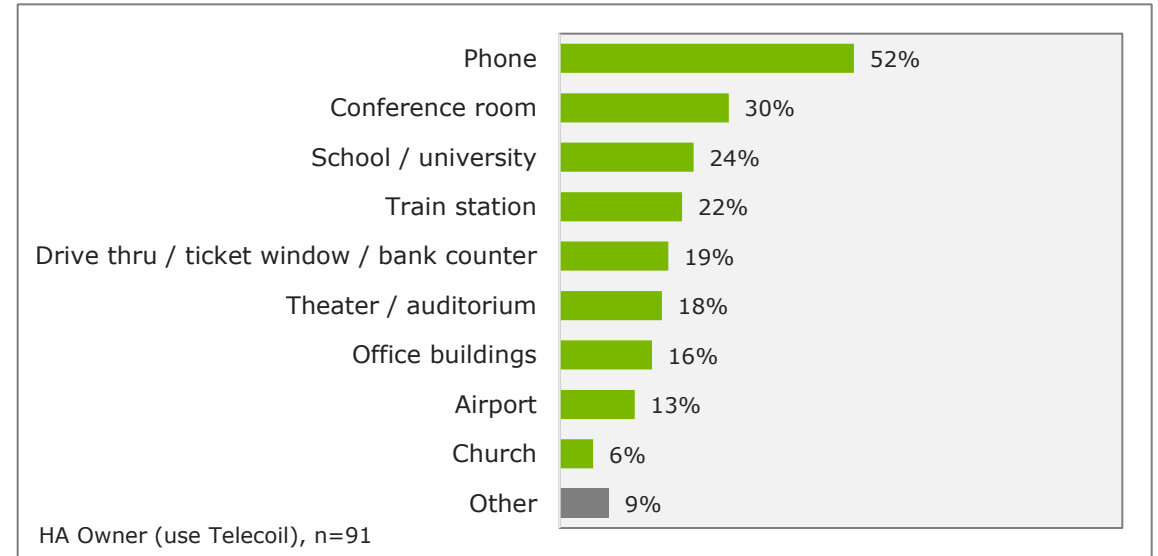


15% of the HAs are (to the knowledge of the owners) equipped with Telecoil – the main usage of Telecoil is in the phone

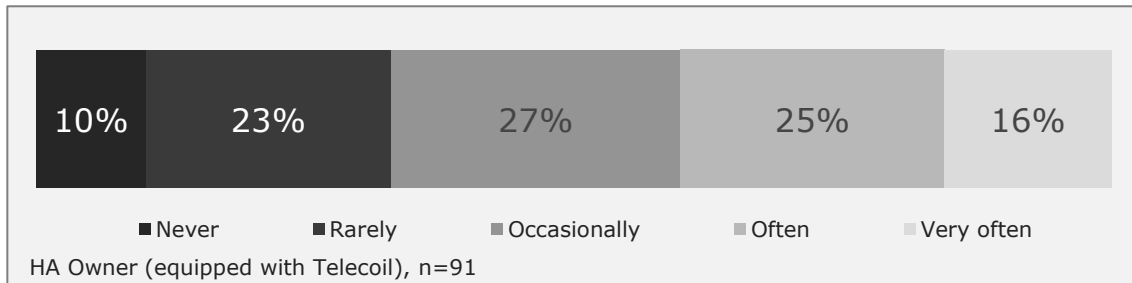
Are your hearing aids equipped with Telecoil?



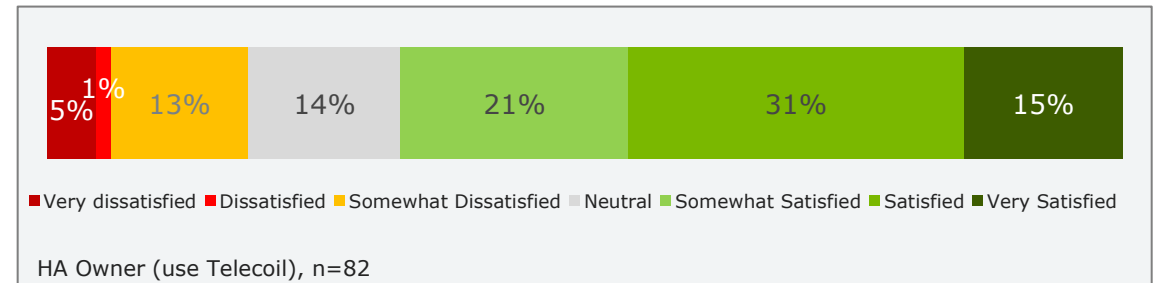
Where do you use your telecoil to improve your hearing?



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



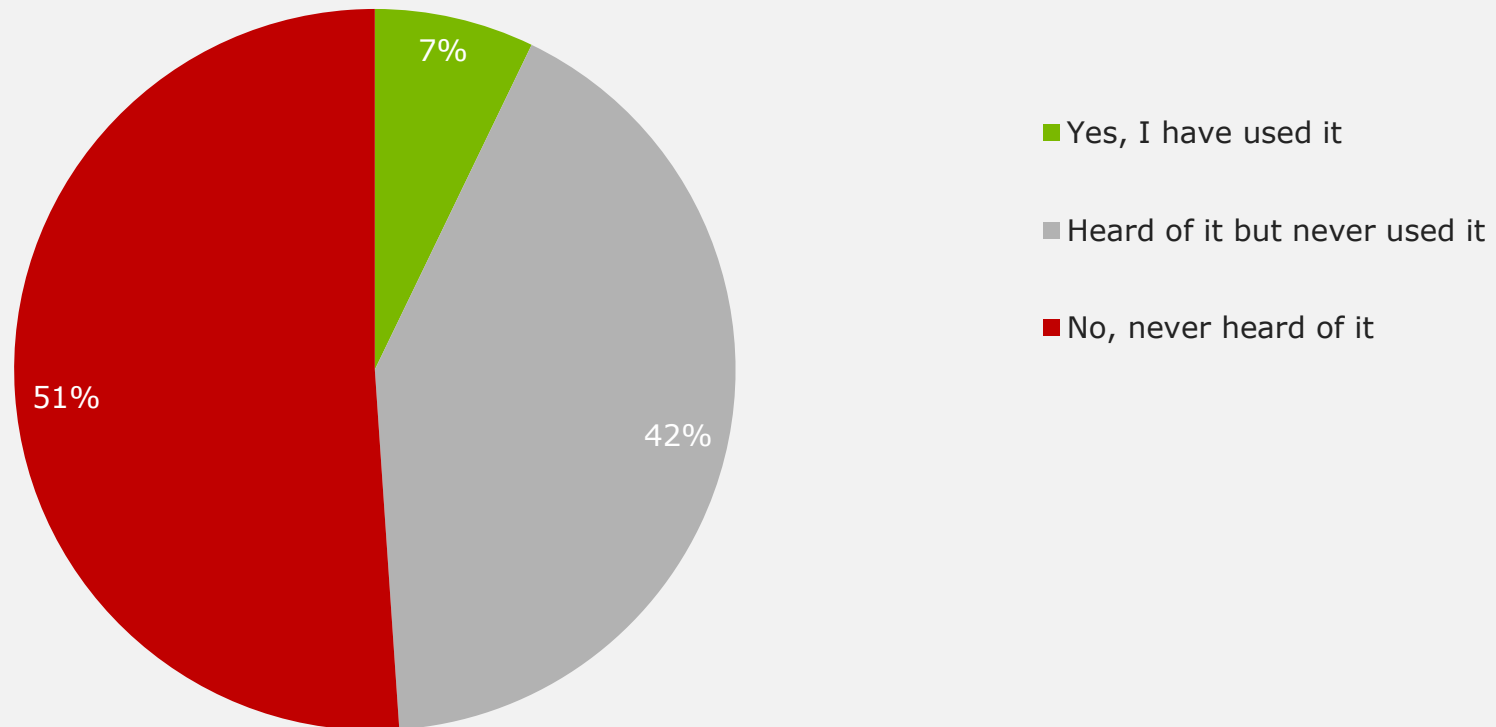
How satisfied are you with the telecoil option?



7% of the HA owners have already used remote fitting, 42% have at least heard of it, and 51% 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)

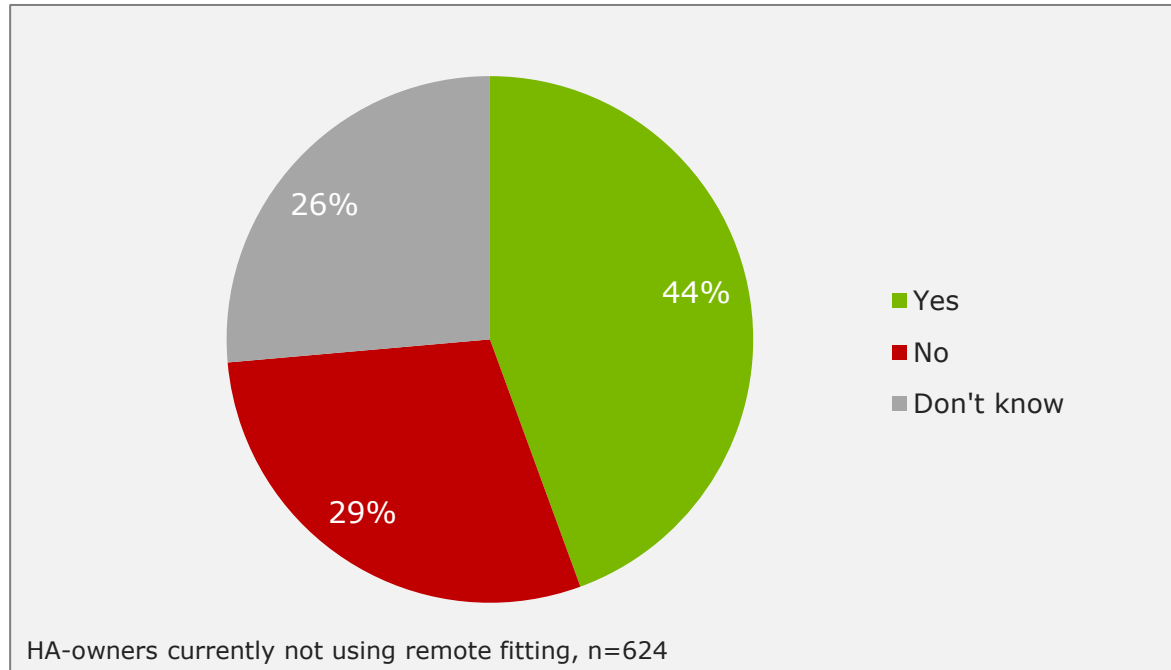


HA Owner n=663

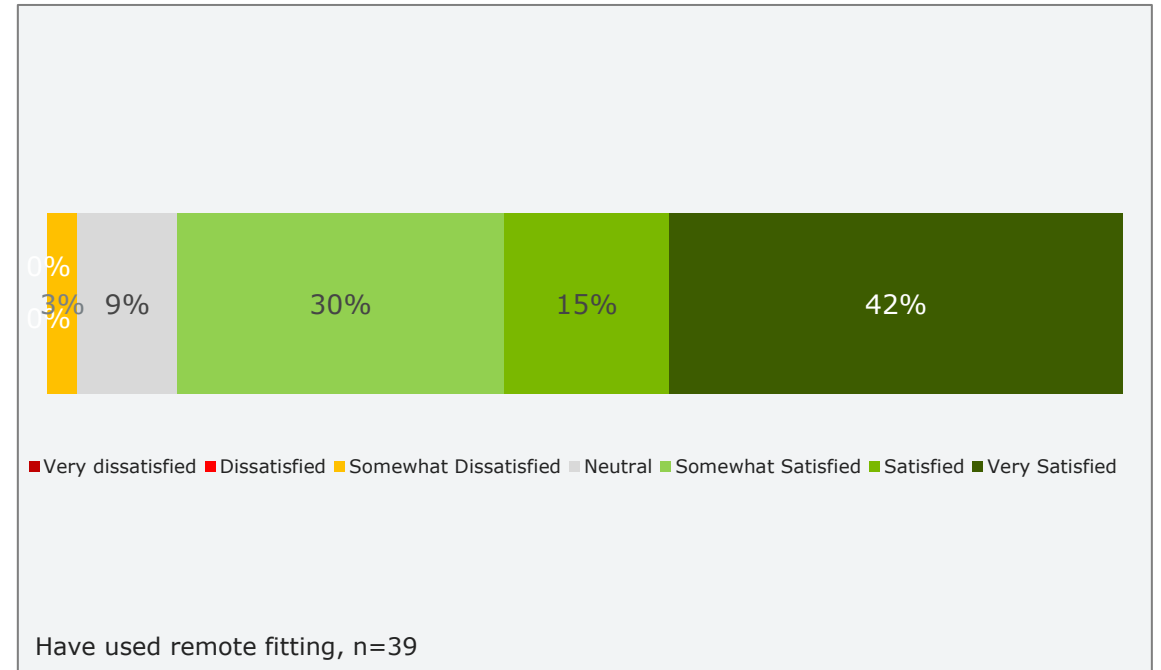


44% of those who haven't used remote fitting would consider using it

Would you use such online remote fitting and/or remote maintenance of hearing aids by a hearing care professional?



Please rate your satisfaction with the experience of remote fitting of hearing aids.





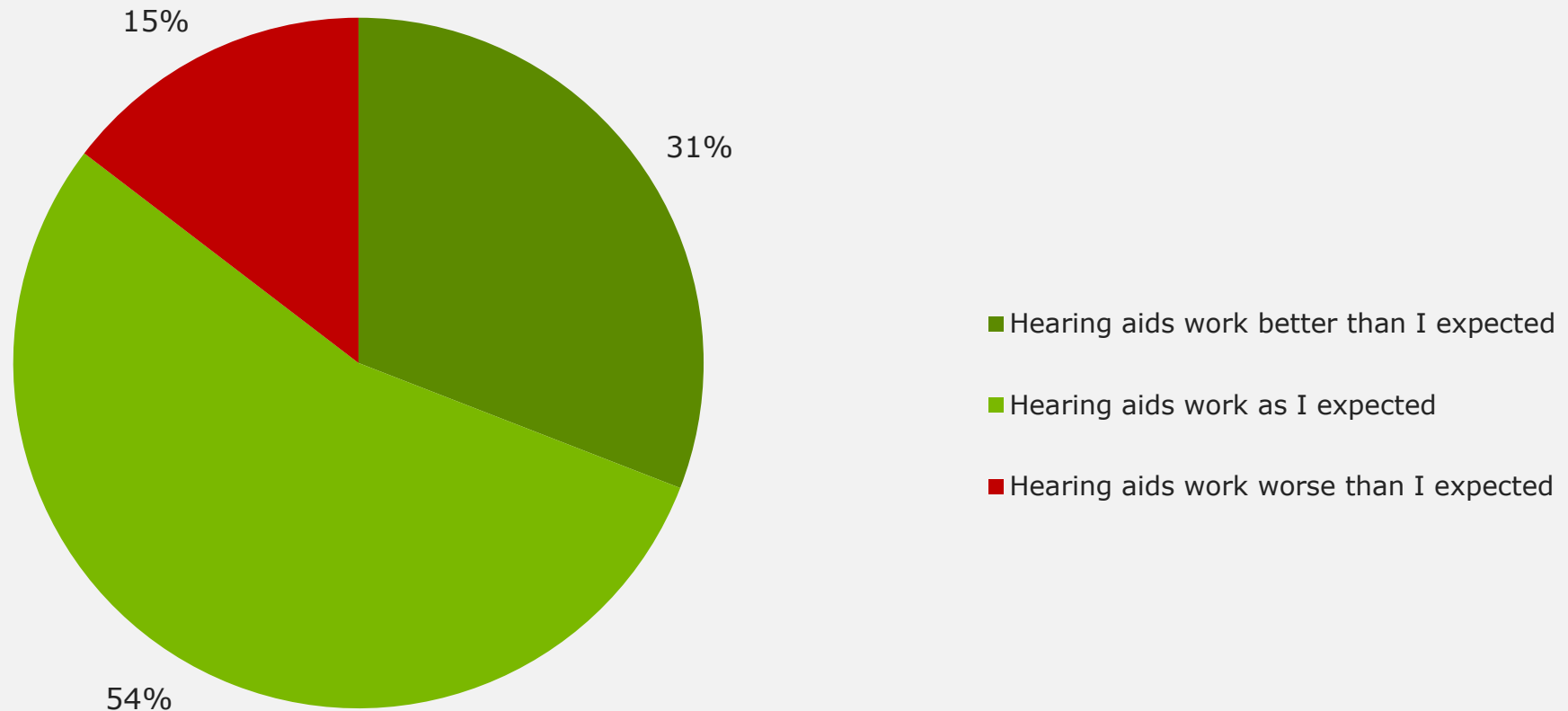
Satisfaction with hearing aids and drivers





85% 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?

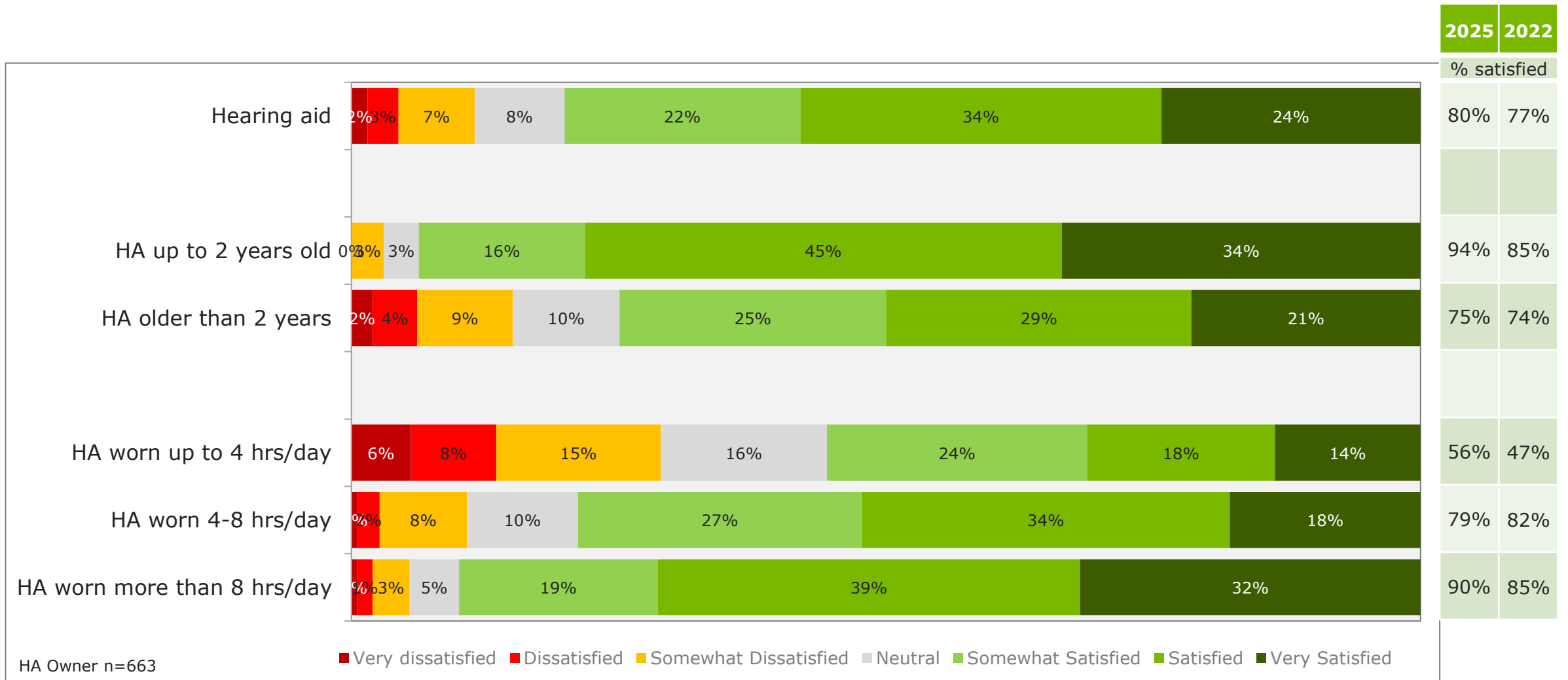


HA Owner n=663





Overall satisfaction with HA: 80% of hearing aid owners are satisfied with their hearing aid(s)



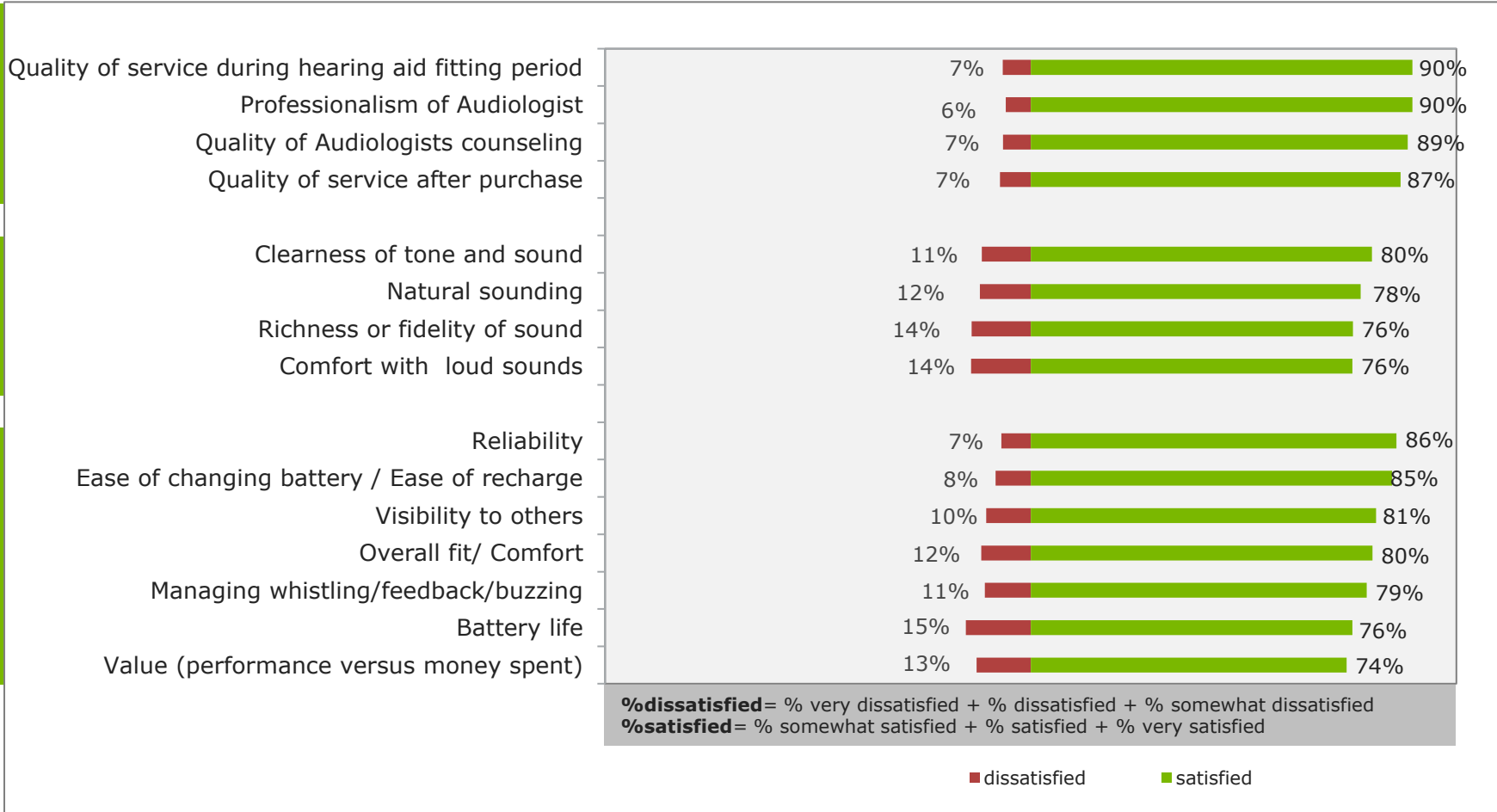


Satisfaction with current hearing aids

HA dispenser/ Audiologist

Sound quality signal processing

Product features



Trend % satisfied compared to 2022

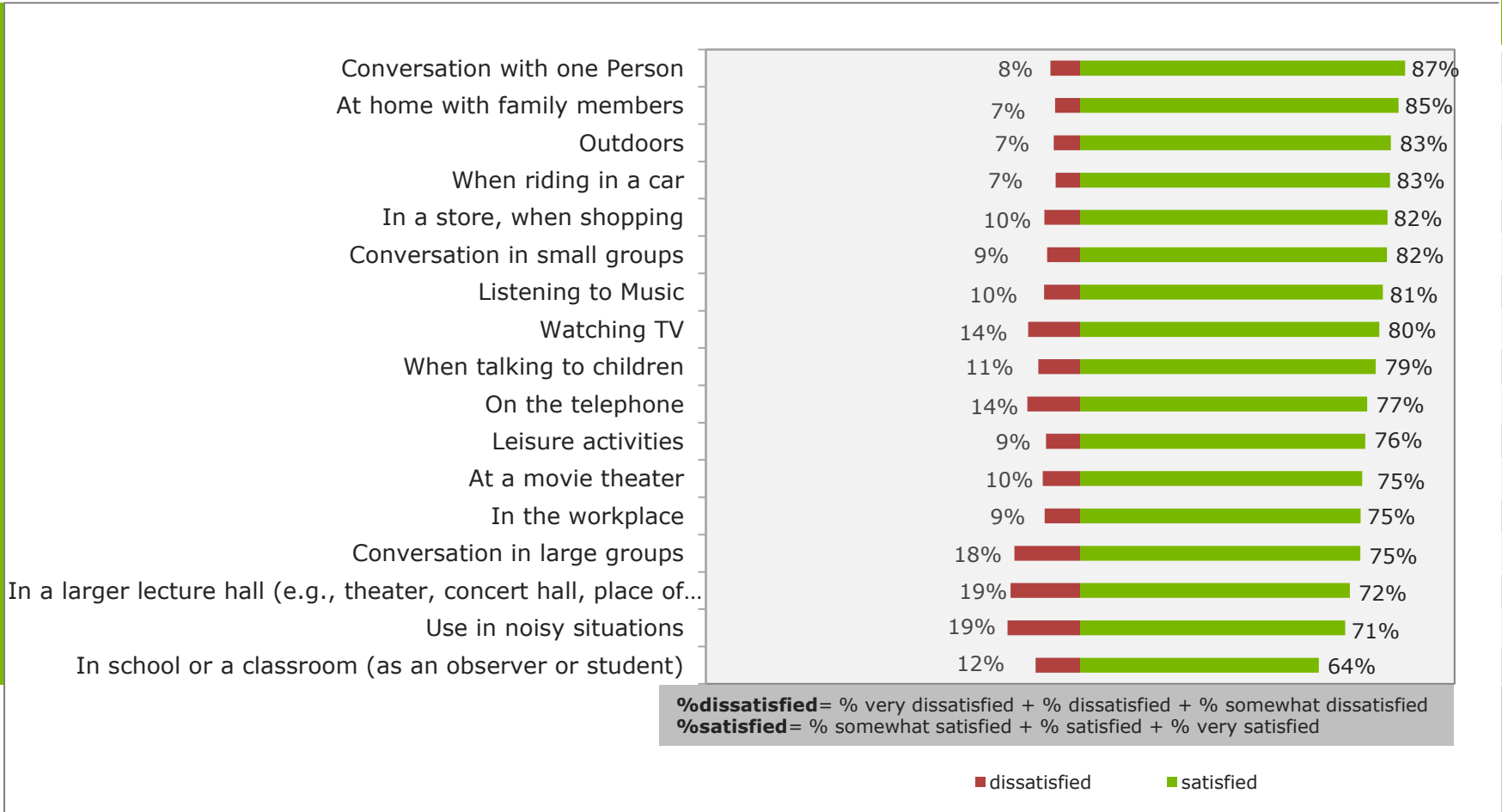
+1%
+1%
+2%
+1%
+5%
+5%
+4%
+5%
+5%
-1%
+2%
+4%
+4%
+10%
+3%





Satisfaction with current hearing aids

Listening situations



Trend % satisfied compared to 2022

Conversation with one Person	+2%
At home with family members	+4%
Outdoors	+3%
When riding in a car	+4%
In a store, when shopping	+3%
Conversation in small groups	+5%
Listening to Music	+7%
Watching TV	+6%
When talking to children	+/-0%
On the telephone	+5%
Leisure activities	+1%
At a movie theater	+3%
In the workplace	+4%
Conversation in large groups	+5%
In a larger lecture hall (e.g., theater, concert hall, place of...)	+5%
Use in noisy situations	+4%
In school or a classroom (as an observer or student)	+/-0%



Factors influencing satisfaction with current hearing aids the most are: Richness or fidelity of sound, natural sound, and clarity of tone and sound

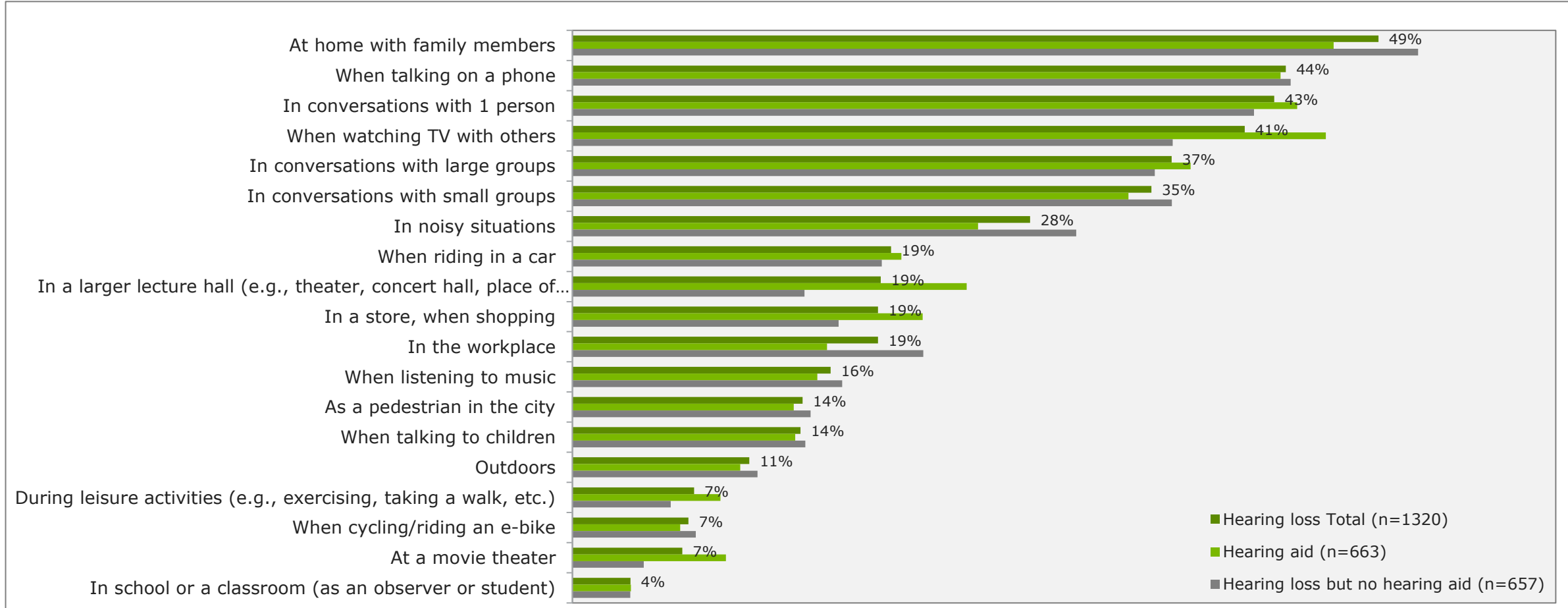
		Influence on overall satisfaction with HA*
HA dispenser / Audiologist	Professionalism of Hearing aid dispenser / Audiologist	0.60
	Quality of service during hearing aid fitting period	0.58
	Quality of HA dispensers / Audiologists counseling	0.58
	Quality of service after purchase	0.56
Sound quality signal processing	Richness or fidelity of sound	0.74
	Natural sounding	0.71
	Clearness of tone and sound	0.70
	Comfort with loud sounds	0.64
Product features	Overall fit/ Comfort	0.65
	Managing whistling/feedback/buzzing	0.62
	Reliability	0.61
	Visibility to others	0.60
	Value (performance versus money spent)	0.53
	Ease of changing battery / Ease of recharge	0.52
	Battery life	0.51

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



The most important listening situations are talking at home with family members, talking on the phone, 1to1 conversations, and watching TV with others

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





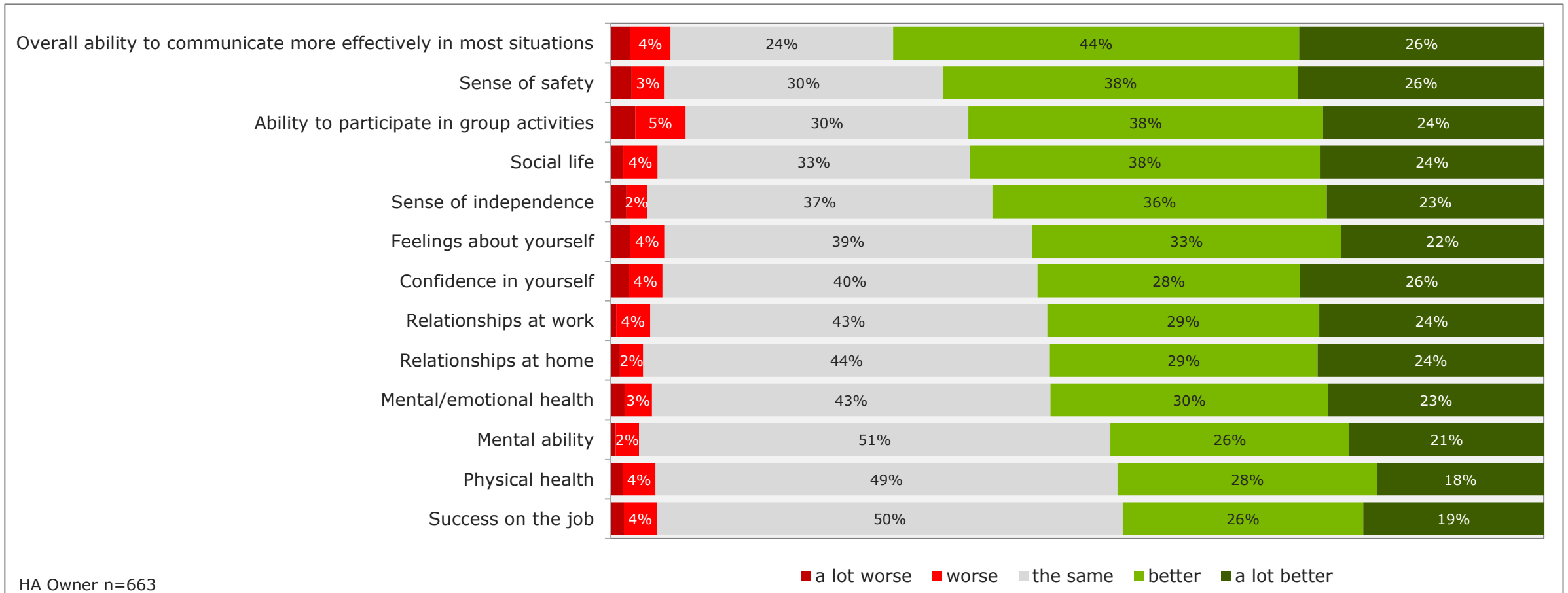
Positive impact of hearing aids, quality of life





Hearing aids have a positive impact on social participation, sense of safety, group activities, and more

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).



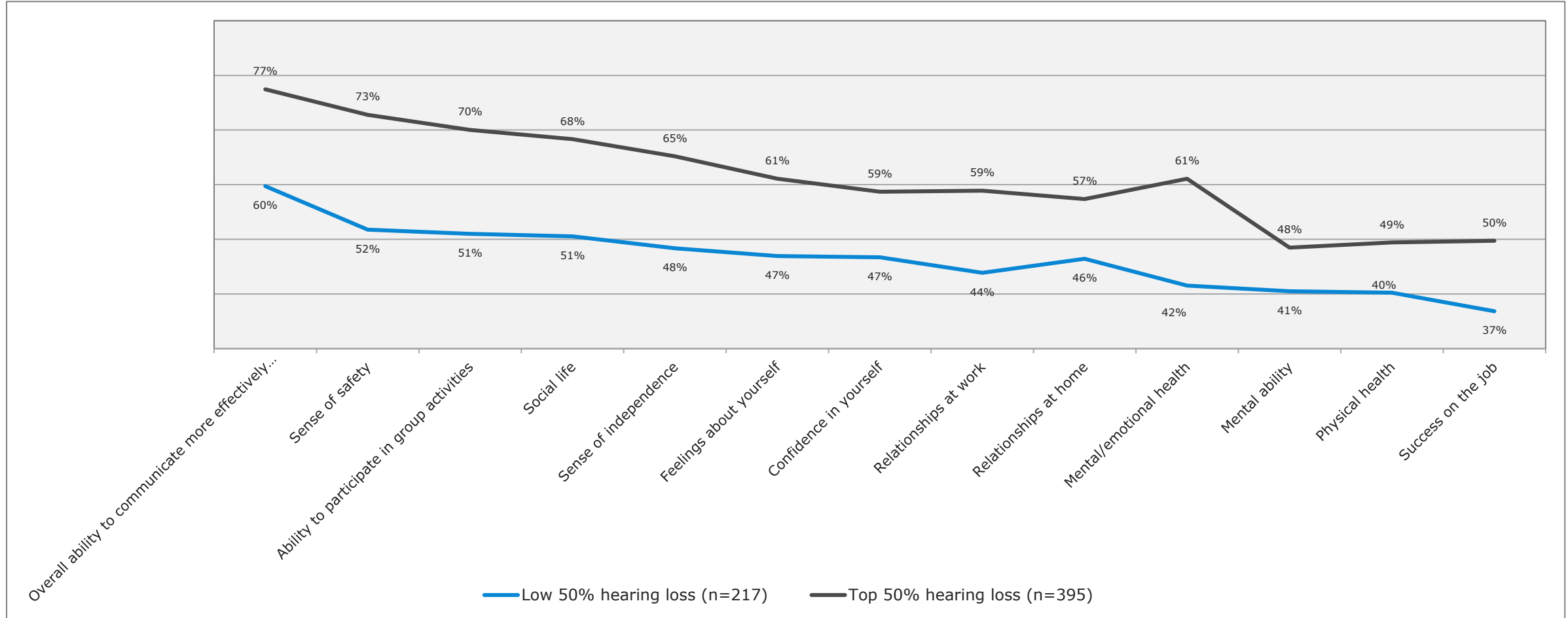
HA Owner n=663





Patients with a Top 50% hearing loss perceive the impact of hearing aids more positively in all aspects

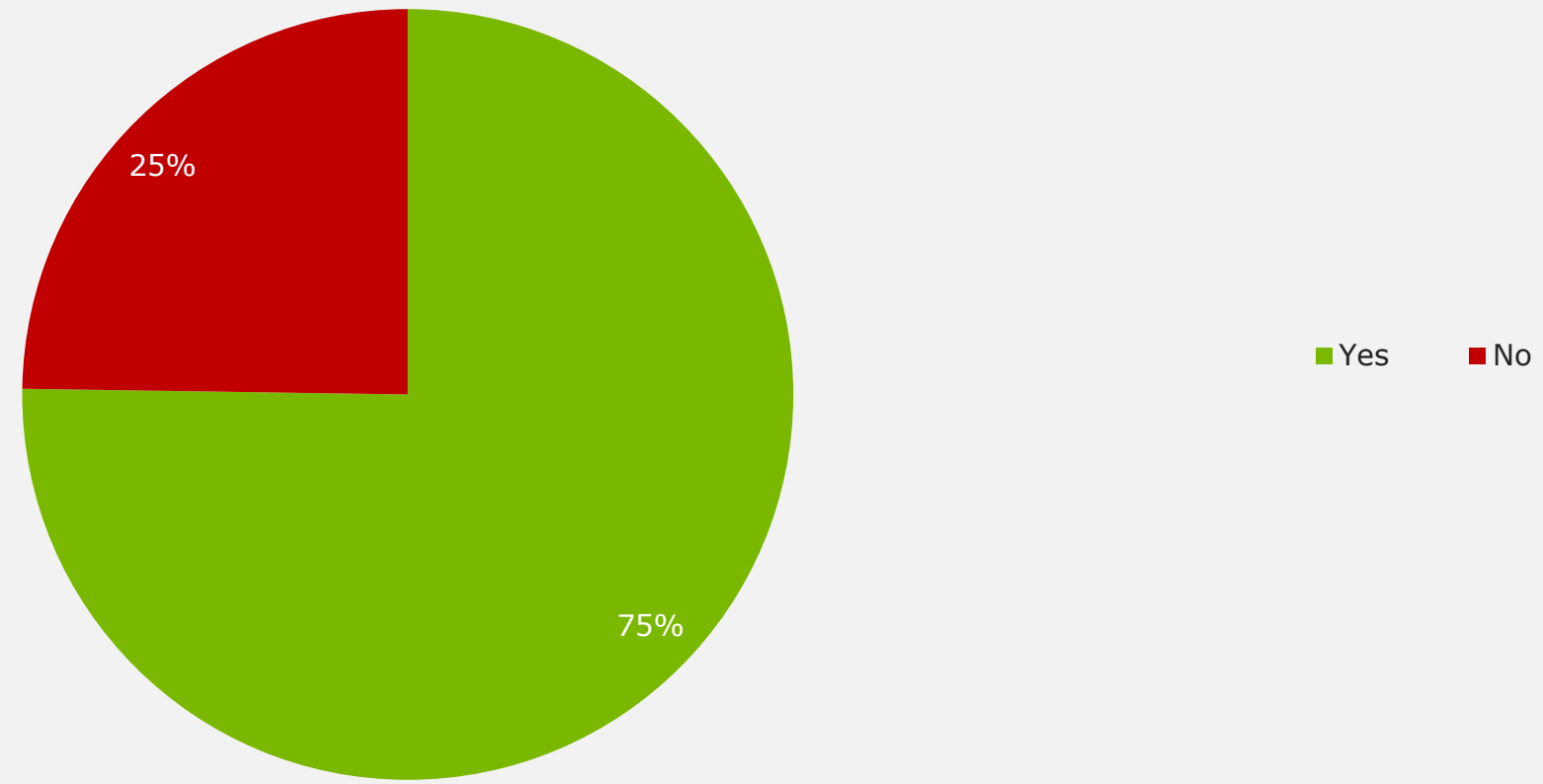
% of HA Owners feeling better/a lot better





75% 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?

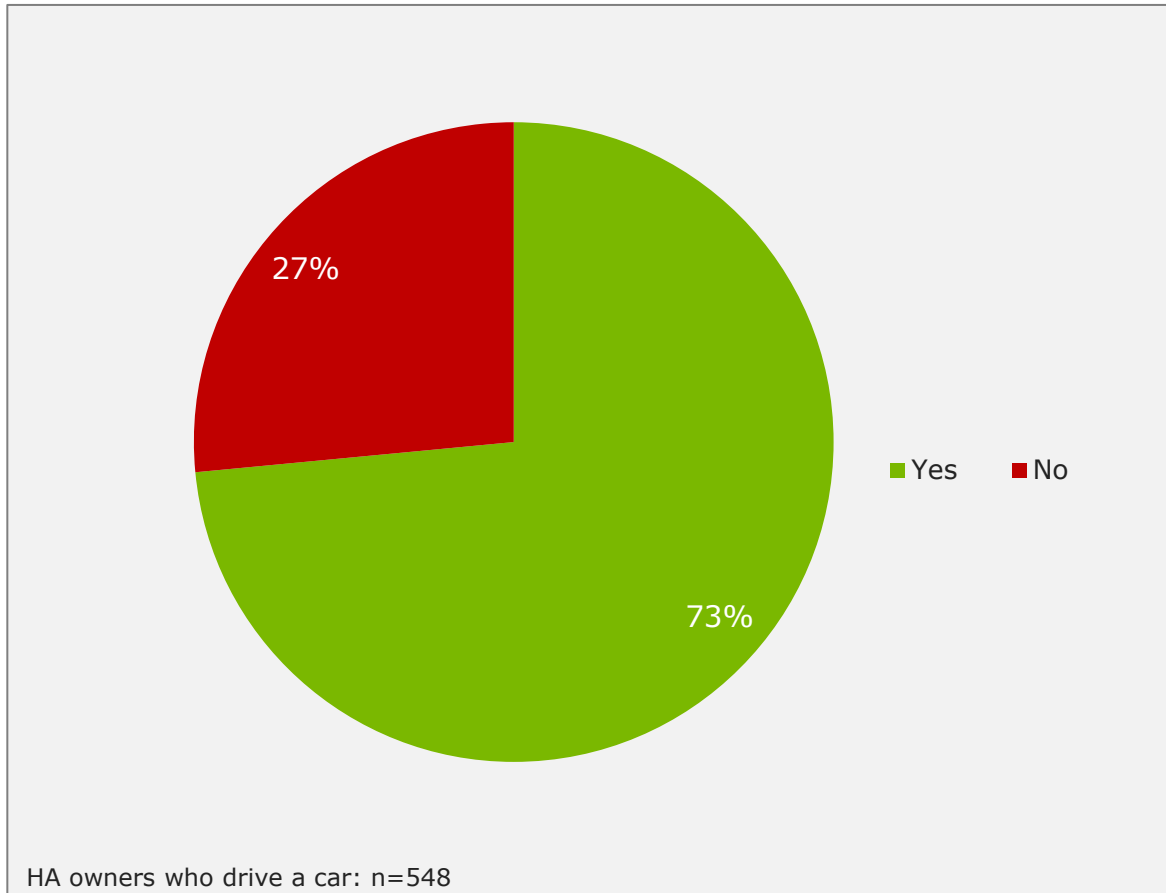


HA Owner n=663

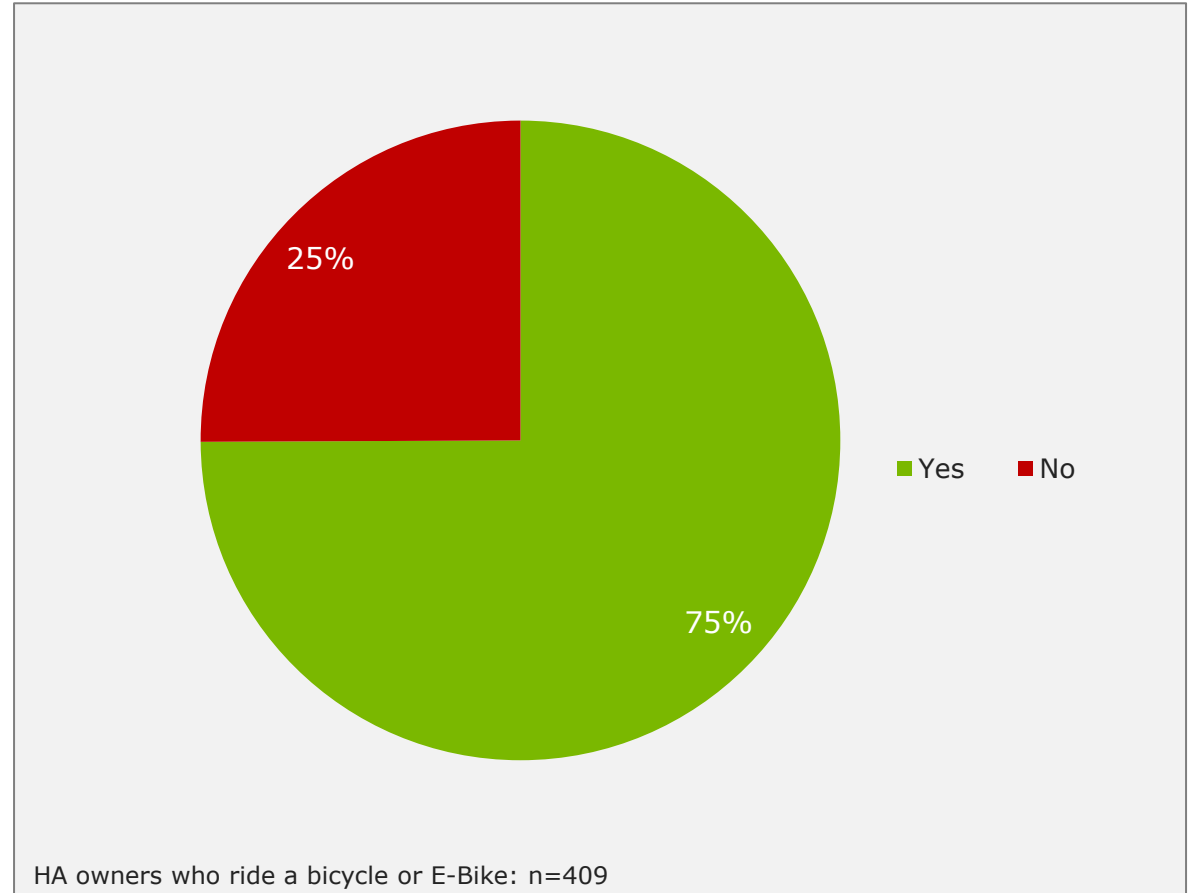


Hearing aid users feel more confident driving a car or (e-)biking

Since wearing a hearing aid, do you feel more confident driving your car?



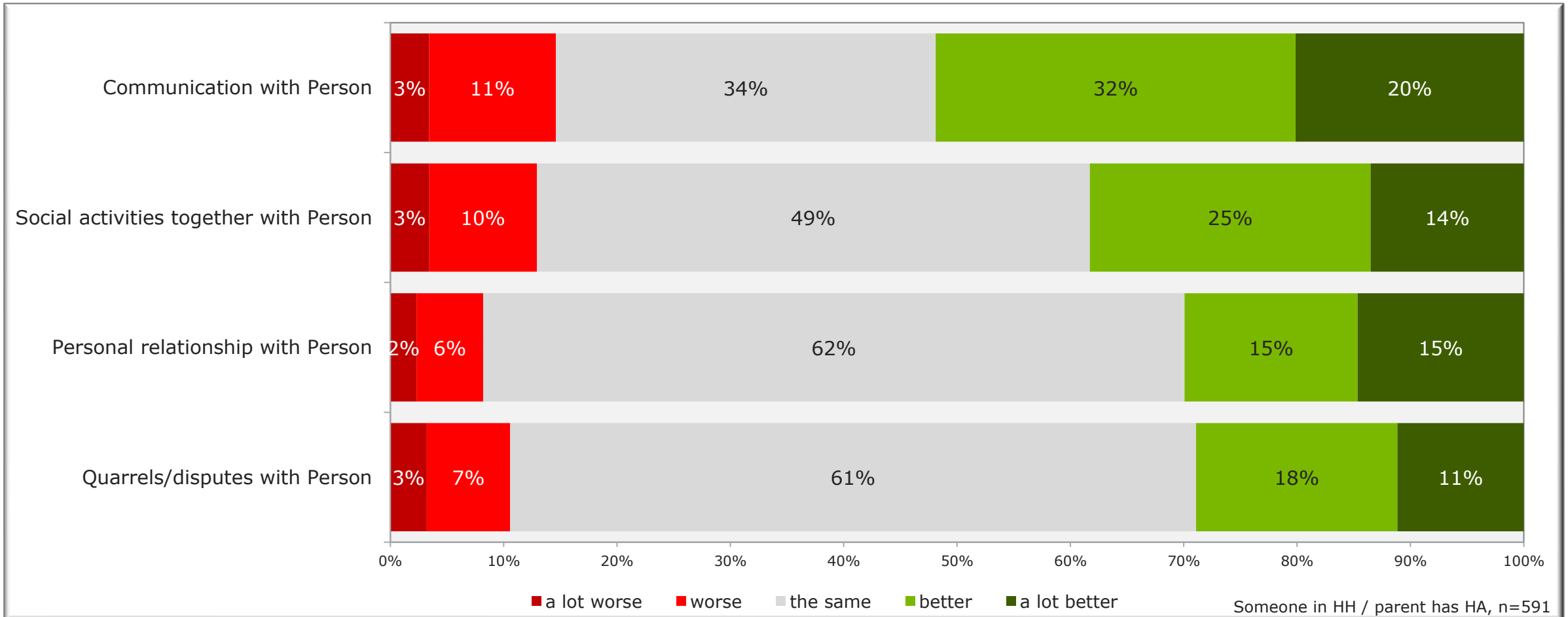
Since wearing a hearing aid, do you feel more confident riding a bicycle or E-Bike?





When someone with hearing loss wears hearing aids, it also improves the situation for others in the household

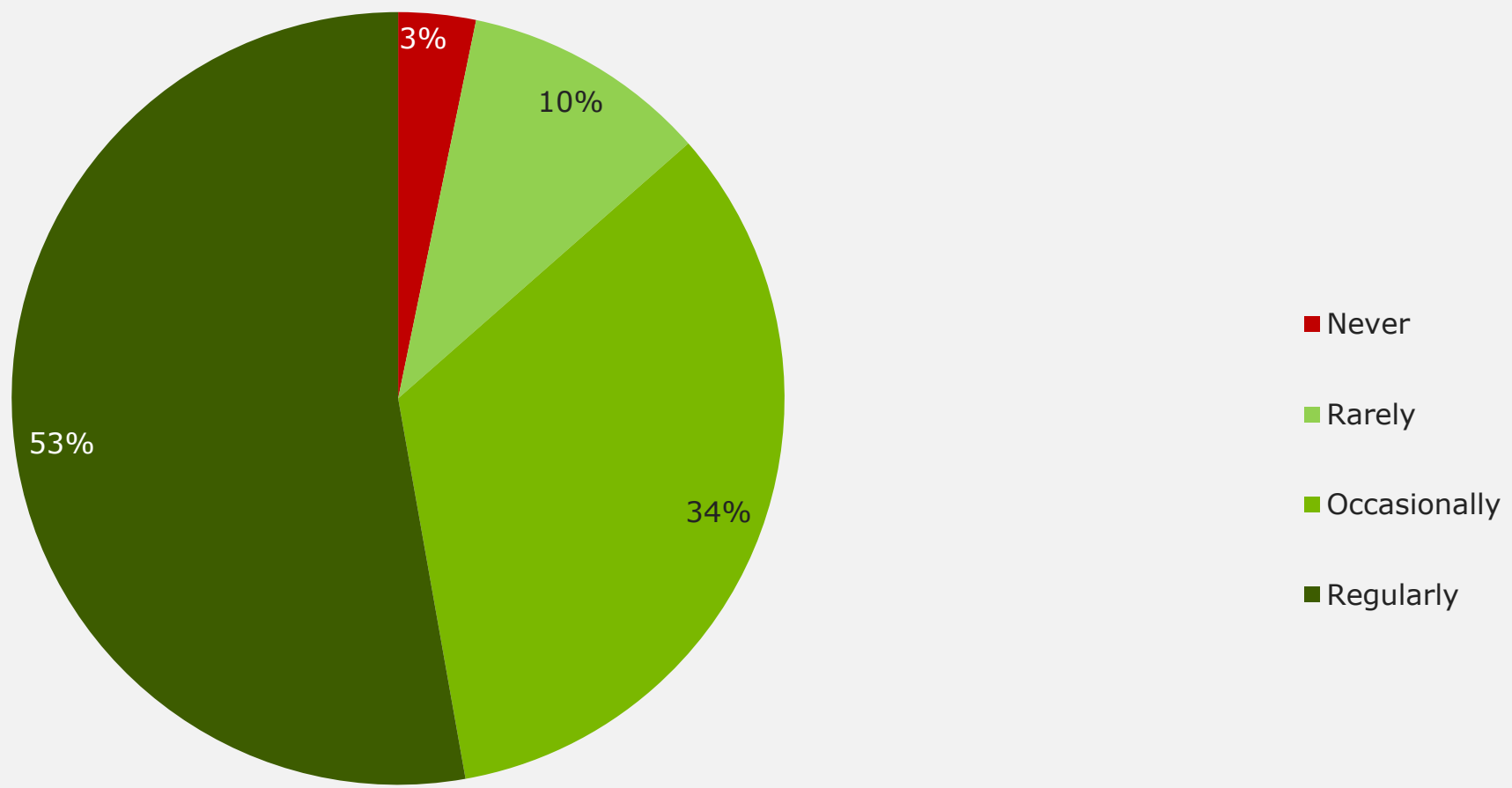
How did the following aspects change since person X is wearing hearing aids?





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?



HA Owner n=663





4. Analysis of hearing impaired non-owners





To analyze reasons for non-adoption, we will examine the top 50% HL group, as their hearing loss structure is more similar to that of HA owners

Hearing loss characteristics: Owners compared to Non-owners

	HA Owner n=663	HA Non-owner low 50% HL n=358	HA Non-owner Top 50% HL n=197
Ears impaired (stated)			
Unilateral loss	16%	44%	24%
Bilateral loss	84%	56%	76%
Perceived loss	652	358	197
Mild	13%	53%	13%
Moderate	52%	44%	69%
Severe	26%	2%	14%
Profound	9%	1%	4%

← More similar hearing loss-structure →



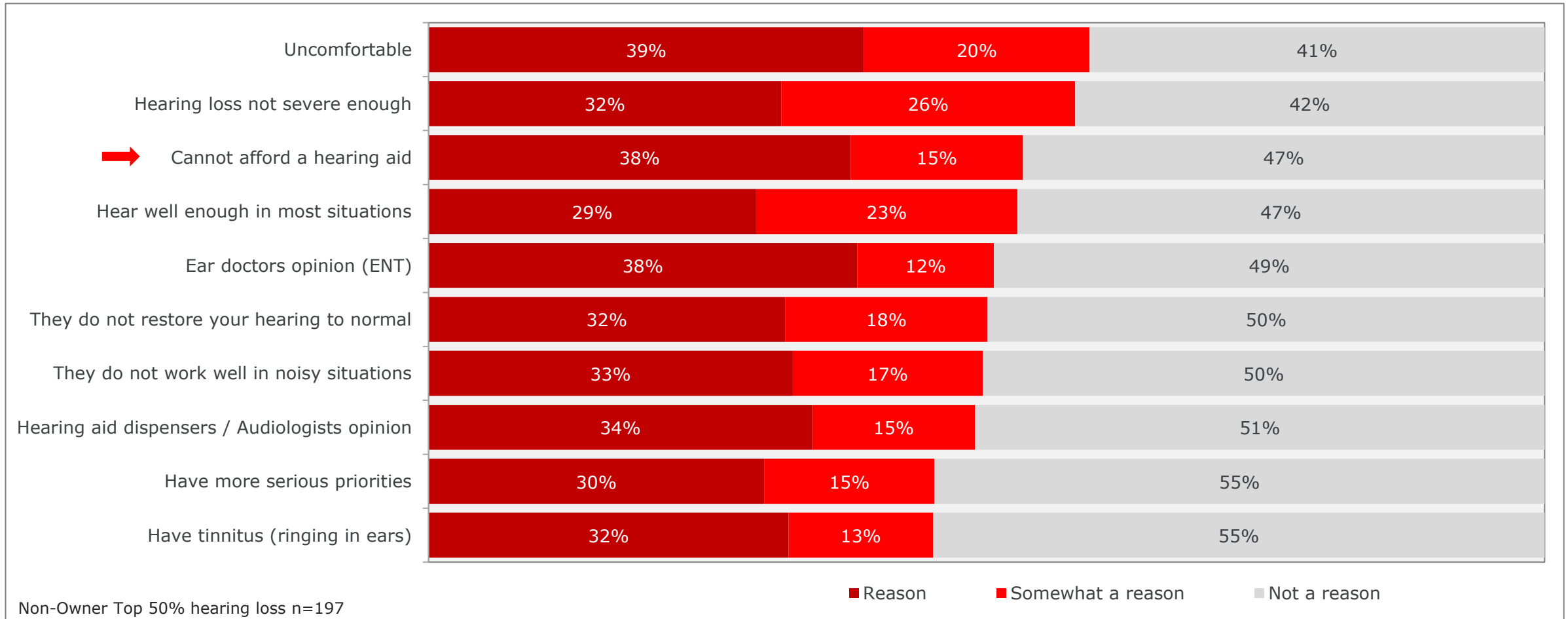


Reasons for not having hearing aids





Top 10 reasons for not having a hearing aid

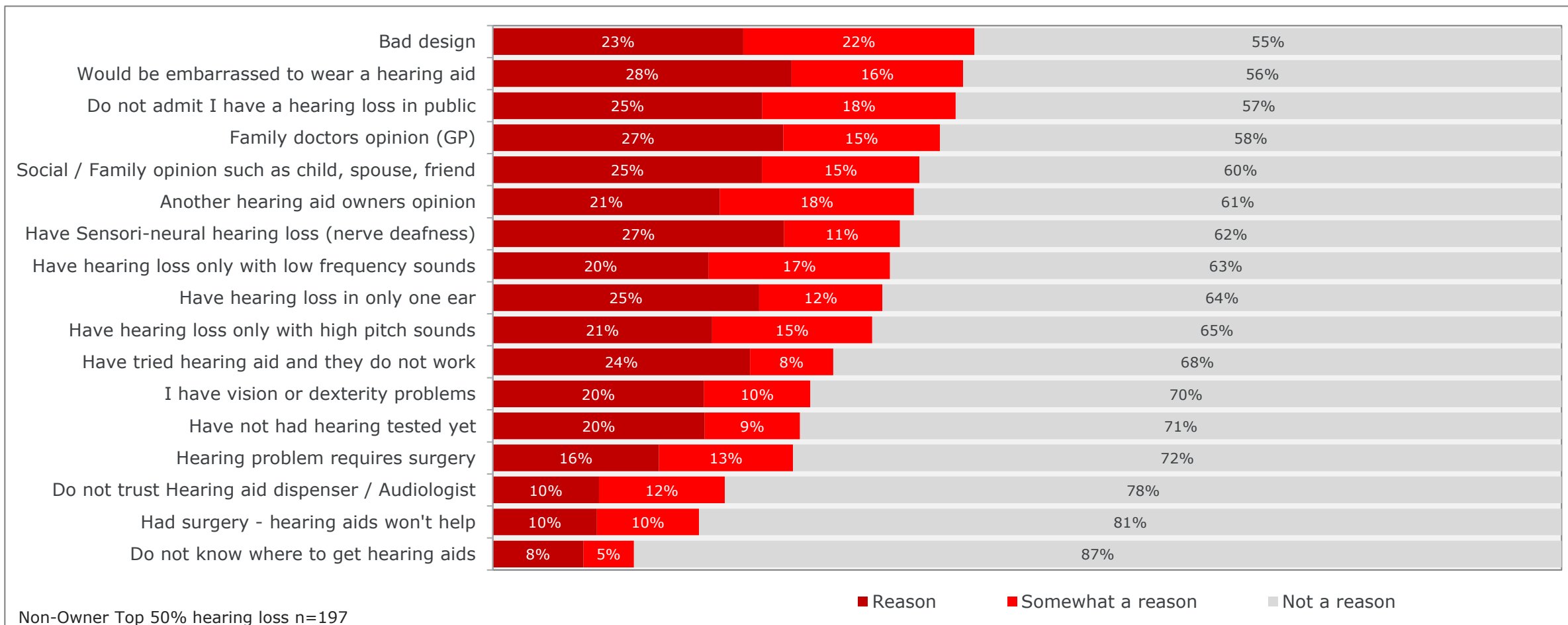


Non-Owner Top 50% hearing loss n=197





Less important reasons for not having a hearing aid

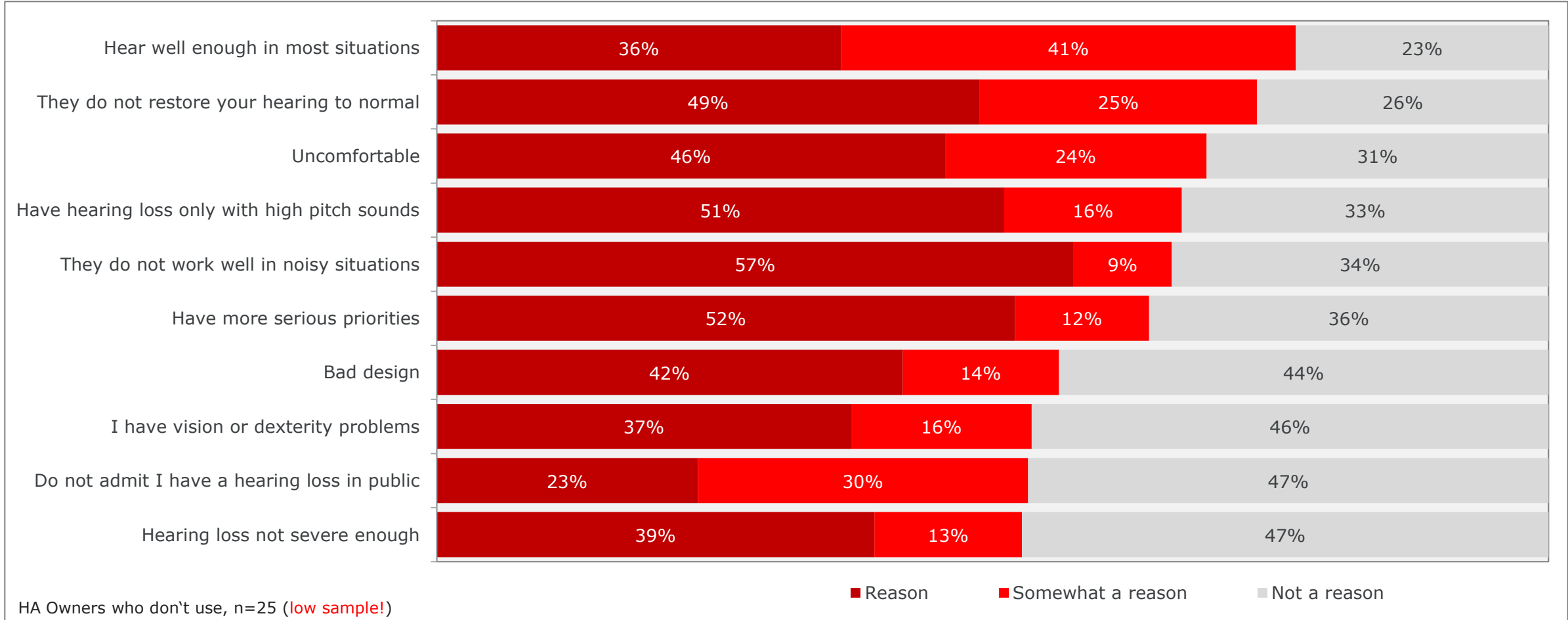


Non-Owner Top 50% hearing loss n=197





Top 10 reasons for HA owners NOT using them



HA Owners who don't use, n=25 (low sample!)





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

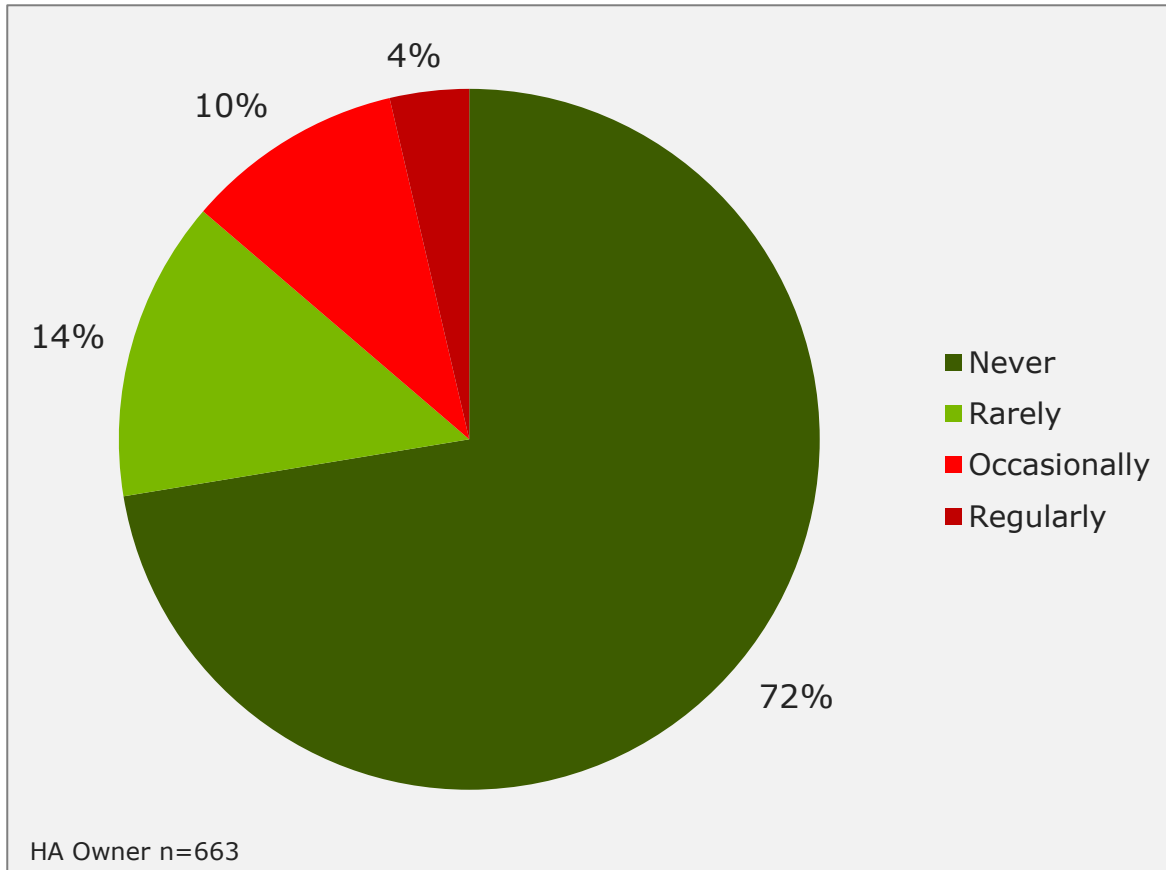




72% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid

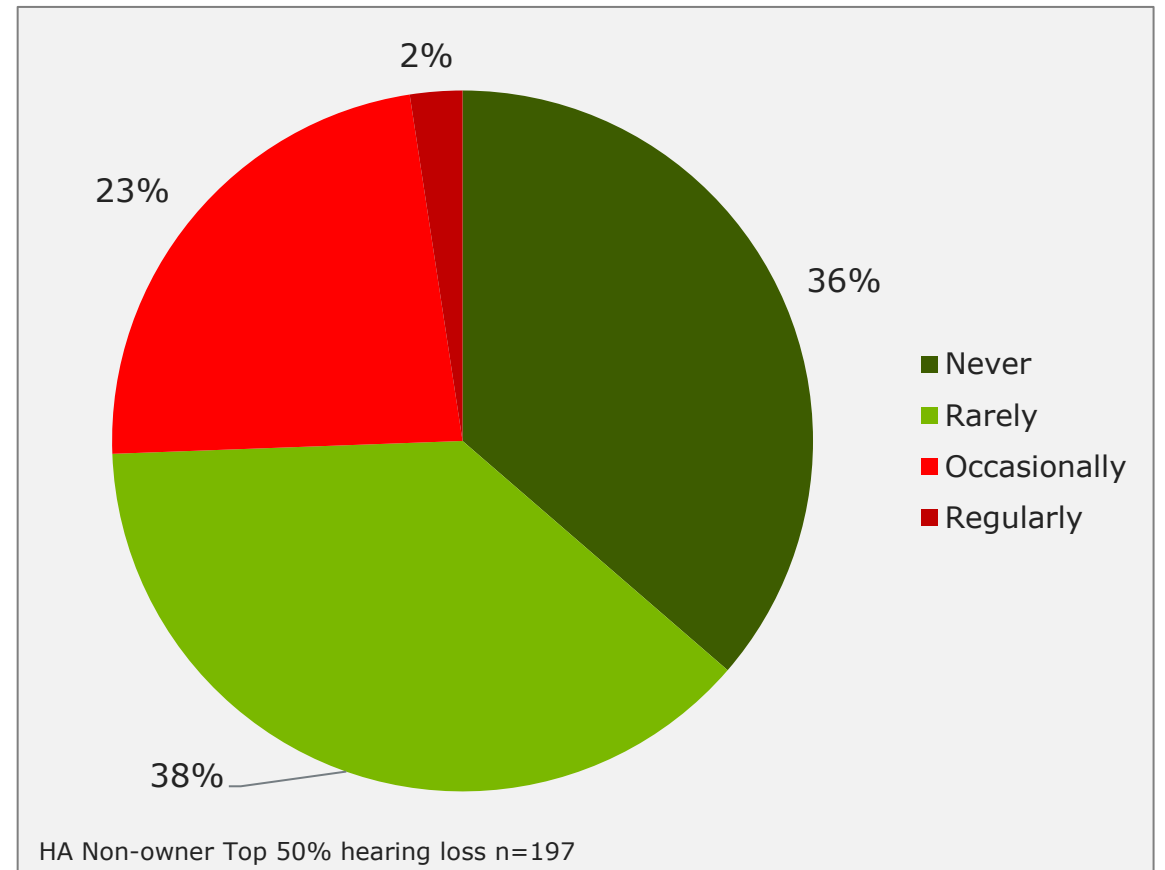
HA Owner:

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



HA Non-owner:

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





Most important triggers to buy

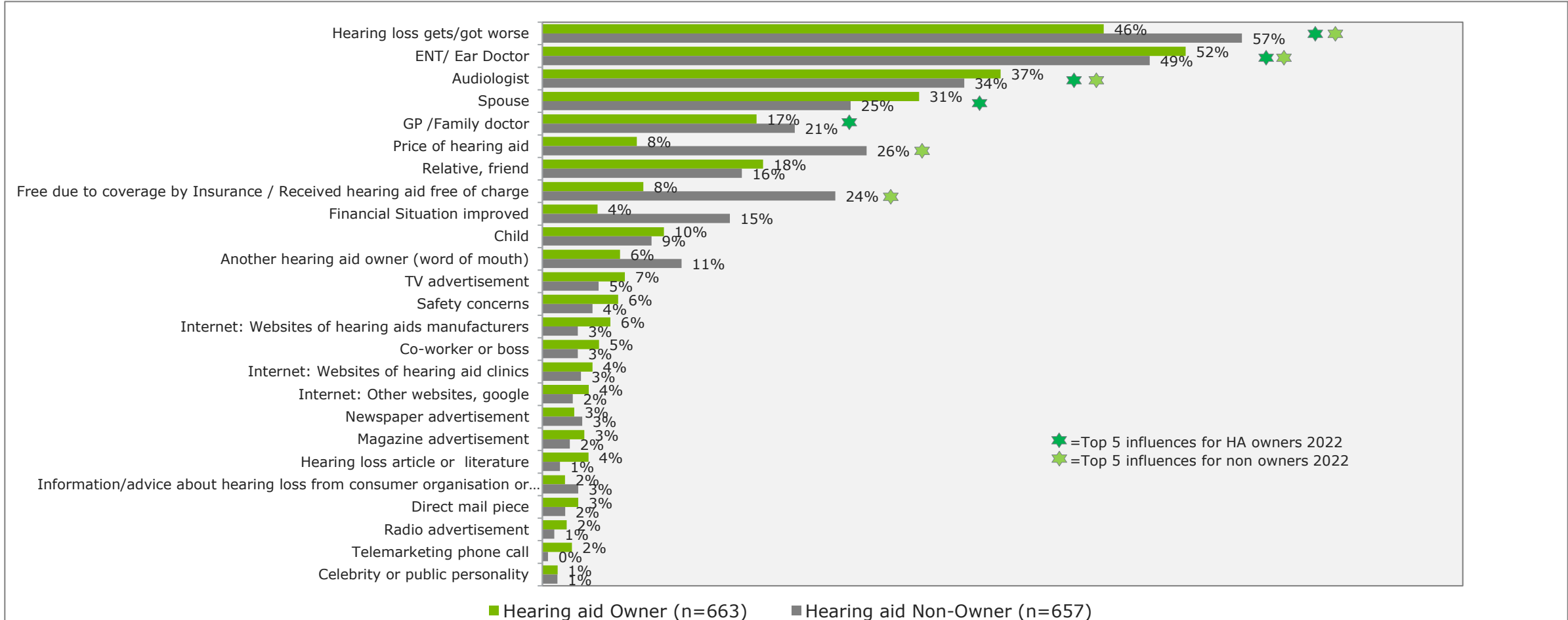




The most important influencing factors for getting hearing aids are worsening hearing, ENT, audiologists, spouses, and GPs (+price, insurance coverage for the nonowners)

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

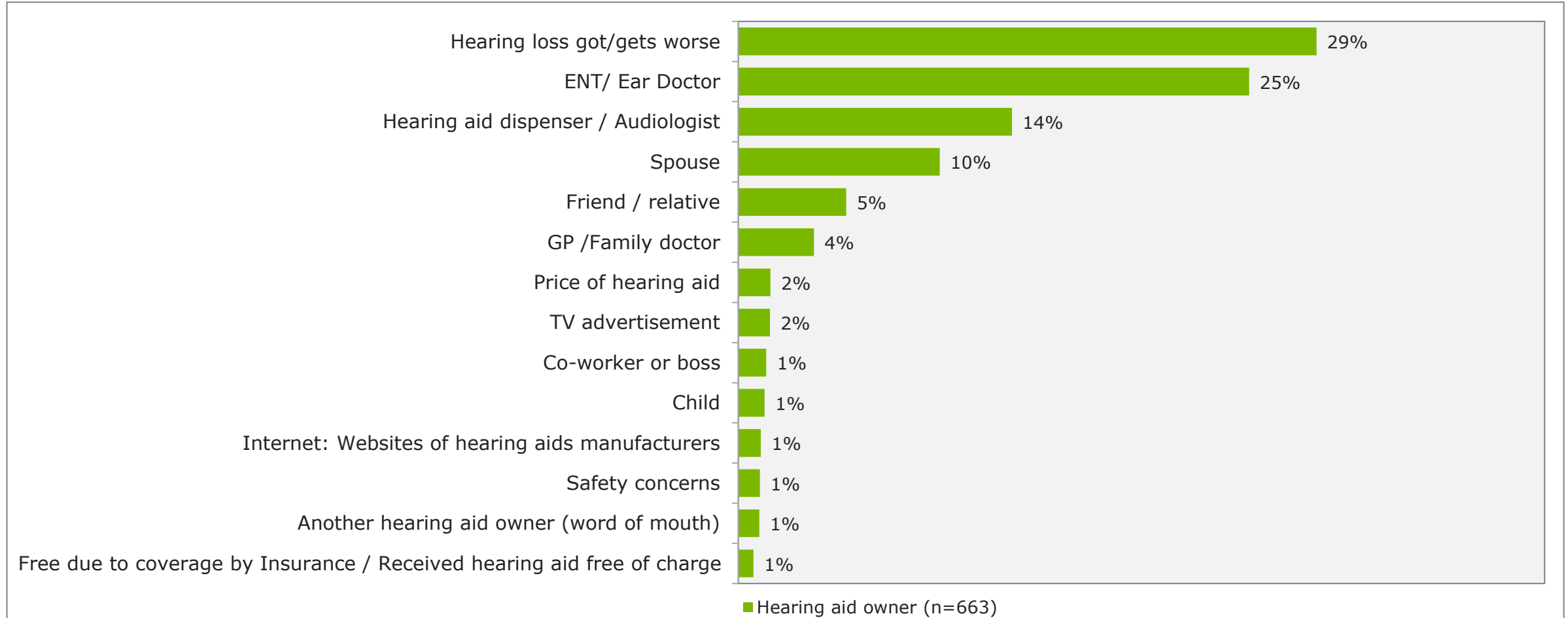
HA Non-owner: What do you think would influence you to obtain / purchase a hearing aid ?





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

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



Provided by:



Stefan Ruf lic. rer. pol.

Anovum GmbH
Chalenstrasse 8a
CH-8123 Ebmatingen

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

www.anovum.com



Dr. Stefan Zimmer ▪ Secretary General
European Hearing Instrument Manufacturers Association
Herriotstrasse 1 ▪ 60528 Frankfurt am Main ▪ Germany
sz@ehima.com ▪ +49-69-664 26 34 10 ▪ www.ehima.com



Peter Heil

Anovum GmbH
Chalenstrasse 8a
CH-8123 Ebmatingen

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

www.anovum.com





APPENDIX



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	6'645	11.2%	44.8%	49.3%	52.9%	48.5%
Female	6'800	10.6%	49.2%	50.7%	47.1%	51.5%
Age						
1 - 14	1'856	2.5%	48.4%	15.1%	3.1%	3.3%
15 - 24	1'280	4.1%	54.0%	10.2%	3.1%	4.1%
25 - 34	1'565	4.1%	30.2%	12.5%	5.7%	2.8%
35 - 44	1'726	5.8%	43.8%	13.6%	7.3%	6.4%
45 - 54	1'676	7.7%	40.2%	12.9%	9.9%	7.5%
55 - 64	2'158	11.7%	38.0%	15.9%	20.2%	14.0%
65 - 74	1'631	18.7%	49.7%	11.1%	19.8%	22.1%
75+	1'554	33.1%	53.3%	8.7%	30.9%	39.9%
Type of household						
single household	2'215	15.5%	49.5%	15.6%	22.3%	24.7%
Couple, no kids	3'843	14.3%	50.6%	27.5%	34.9%	40.3%
Couple with kid(s)	4'945	5.5%	39.0%	39.0%	21.5%	15.5%
Single mom/dad with kid(s)	869	7.4%	46.2%	6.7%	4.5%	4.3%
Retirement home, hospital etc.	231	35.5%	62.7%	1.2%	3.9%	7.5%
Other	1'342	11.3%	34.6%	9.9%	12.8%	7.6%

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)	6'730	14.0%	48.0%	48.3%	63.1%	65.7%
The spouse of the head of the household	3'048	10.6%	52.7%	22.7%	19.8%	24.8%
Daughter/son of head of household	2'434	2.0%	29.8%	19.9%	4.5%	2.1%
Other person	1'233	12.1%	33.7%	9.1%	12.7%	7.3%
Employment						
Full time employed	4'697	6.9%	37.4%	43.5%	27.0%	18.2%
Part time employed	1'474	7.1%	35.4%	13.6%	9.0%	5.6%
Unemployed / not working	858	8.5%	32.0%	7.8%	6.6%	3.5%
Retired under a disability pension scheme (fully or partly)	291	14.0%	50.2%	2.5%	2.7%	3.1%
Early retired under an early retirement benefit scheme	1'437	22.9%	51.6%	11.0%	21.2%	25.6%
Retired (at the official retirement age)	2'035	25.7%	54.8%	15.0%	31.5%	43.2%
Student / pupil / in training	679	3.1%	25.8%	6.5%	2.1%	0.8%
Education						
Hauptschule	1'465	16.1%	49.7%	12.2%	15.8%	17.7%
Mittlere Reife (Realschule)	2'065	10.1%	46.3%	18.5%	14.9%	14.6%
Abitur/Fachabitur	1'445	7.4%	49.4%	13.3%	7.2%	8.0%
Lehrabschluss/Anlehre	2'796	14.2%	47.0%	23.9%	27.9%	28.1%
Höhere Berufsausbildung (Techniker, Meister o.Ä.)	964	13.1%	44.4%	8.3%	9.4%	8.4%
Fachhochschulabschluss	753	13.6%	49.5%	6.5%	6.9%	7.6%
Universitätsabschluss	1'475	11.1%	51.9%	13.0%	10.5%	12.8%
Anderes	507	14.7%	25.0%	4.3%	7.5%	2.8%

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:	
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