Results

EuroTrak France 2015

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

Research to create value
Summary
1. Introduction

- EuroTrak France 2015 was designed and executed by Anovum (Zurich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).

- Sample sizes France 2015:
  - Representative sample (sample 1): n=14’824 people
  - Hearing impaired (sample 2):
    - Hearing impaired non-owners: n= 819 people with hearing loss (HL)
    - HA owners: n= 501 people with hearing aid (HA)

- EuroTrak France 2015 is part of the EuroTrak studies:
Summary

2. Market overview

• Stated hearing loss prevalence
  - Total: 9.3 %, 18+: 11.4% (2012: 9.4%, 18+: 11.5%).
  - Binaural hearing loss: HA owners: 77%, HA non-owners: 55%.
  - Hearing Tests: 32% (2012: 29%) had a hearing test in the last 5 years, most tests done by ear doctors

• Hearing aid adoption rate (HA penetration)
  - Total: 34.1% (2012: 30.4%).
  - Total age group 18+: 33.6% (2012: 30.4 %).
  - 70% of HA owners have binaural treatment.

• The route to the hearing aid
  - 74% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 48% got hearing aids recommended from the ENT or family doctor (drop out rate=36% / 2012: 37%).
  - 27% of the GP consultations referred to an hearing aid dispenser (2012 only 19%).
  - 75% (2012:76%) of the GP consultations referred to an ENT, 8% (2012: 12%) recommended no action.
  - 34% of ENT consultations referred to a audiologist, 39% (2012: 38%) 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 hearing impaired use hearing aids.
3. Analysis of hearing aid owners

- Hearing aid ownership and usage, accessories and Telecoil
  - 81% (2012: 77%) of all HA owners received some kind of 3rd party reimbursement.
  - 48% of the currently owned HAs were bought in the last two years (EuroTrak 2012: 58%)
  - The average age of the currently owned HAs is 2.9 years (2012: 2.5 years).
  - The median age of hearing aids before replacement is 6 years.
  - On average, HAs are worn 8.6 hours a day (2012: 9.2).
  - 40% of today’s hearing aid owners are aware of their hearing aid brand, 49% would preferably choose the same brand if they would plan to obtain new hearing aids (46% are indifferent).
  - TV Box is the most often owned electronic accessory: 8 % of hearing aid owners have one – 40% have heard of it but don’t own one.
  - 22% of hearing aid owners know what Telecoil is but only 7% have used it – mainly in a conference room. Most of those who use it are satisfied.

- Importance of listening situations and satisfaction with HAs
  - 72% of the hearing aid owners say their hearing aid works better than or as expected
  - 84% (2012:80%) of the HA owners are satisfied with their HAs.
  - The more hours worn per day, the higher the satisfaction.
  - Satisfaction with newer hearing aids is higher than with older hearing aids.
  - Talking at home with family members, talking on a phone and conversations (large group, 1 person) are the most frequent important listening situations.

- Positive impact of HAs
  - Significant positive impact of HAs on different aspects – especially communication, social life and participation in group activities.
  - 96% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes
Summary

4. Analysis of hearing impaired non-owners

• Reasons not to own/use HAs
  – Only 30% (2012: 32%) of the hearing impaired without hearing aids think that a third party would pay any part of hearing aids.
  – The main reasons for not using hearing aids are that people say they cannot afford a hearing aid, that they have more serious priorities and the ENT’s opinion.
  – 4% who own HAs don’t use them at all (0 hour); 10% use them less than one hour/day (0-1 hour).

• Social rejection, buying intentions and triggers to buy
  – 87% of hearing aid owners think people don’t make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.
  – The most important influencing factors for getting hearing aids are worsening hearing loss, ENT and audiologist. Insurance coverage/price of hearing aids is only relevant for the non owners.
  – 8% (2012: 7%) of non-owners intend to get a hearing aid within the next year.
Results

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Detailed Results: Roadmap
New topics for EuroTrak 2015 are highlighted in red

1. Introduction
   - Organisation of EuroTrak 2015
   - 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 and dementia symptoms, sleep quality

3. Analysis of hearing aid owners
   - Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
   - Awareness and usage of accessories and Telecoil
   - Satisfaction with hearing aids and drivers
   - Importance of listening situations
   - Positive impact of hearing aids, quality of life

4. Analysis of hearing impaired non-owners
   - Reasons for not having hearing aids and why some people can consider hearing aids as uncomfortable
   - Social rejection because of hearing loss compared to the acceptance of hearing aids
   - Buying intentions and most important triggers to buy

5. Appendix
   - Demographics: Hearing instrument adoption rates and populations
1. Introduction
Organisation of EuroTrak 2015

Organisation

- Principal of the project EuroTrak is the European Hearing Instrument Manufacturers Association [EHIMA]. Members of EHIMA are: GN Resound, Oticon, Phonak, Sivantos, Starkey and Widex [EHIMA Companies].
- Anovum Zurich developed the concept of EuroTrak, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore Anovum analysed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire.

Use of the data

- The principal as well as the EHIMA companies 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 or the EHIMA companies use 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 – France/2015/n=[relevant sample size]”

- The principal and EHIMA companies can ask Anovum to further analyse the raw data in specific ways at their own expense.

- EHIMA companies can order a report with satisfaction scores for their brand. The other brands will be shown as benchmarks without denomination (brand A, brand B etc.). The report will show all satisfaction values. It is not allowed to communicate any information from these reports outside the EHIMA company.
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 panellist pools of more than 40’000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of $n=14'824$ 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: $n=819$ hearing aid owners and $n=501$ hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age
Hearing loss prevalence France

% hearing loss prevalence

- Total: 9.3% (9.4%), 11.4% (10.4%), 18.0% (11.5%), 12.3% (12.7%), 7.9% (10.7%), 5.5% (6.4%), 4.9% (4.6%), 3.2% (3.2%), 1.7% (1.6%), 1.7% (2.1%)
- Total 18+: 33.0% (33.7%), 31.3% (31.3%), 21.3% (18.2%), 14.8% (15.6%), 12.3% (14.8%), 12.3% (10.7%), 5.5% (5.5%), 4.9% (4.6%), 3.2% (3.2%), 1.7% (1.6%), 1.7% (2.1%)
- 74+: 11.4% (10.5%), 11.5% (12.7%), 18.0% (18.2%), 12.3% (15.6%), 7.9% (14.8%), 5.5% (10.7%), 5.5% (6.4%), 4.9% (4.6%), 3.2% (3.2%), 1.7% (1.6%), 1.7% (2.1%)
- 65-74: 12.3% (10.7%), 14.8% (10.7%), 12.3% (14.8%), 12.3% (12.3%), 7.9% (8.8%), 5.5% (6.8%), 4.9% (4.8%), 4.9% (4.8%), 3.2% (3.2%), 1.7% (1.6%), 1.7% (2.1%)
- 55-64: 15.6% (15.6%), 15.6% (15.6%), 15.6% (15.6%), 15.6% (15.6%), 15.6% (15.6%), 15.6% (15.6%), 5.5% (5.5%), 5.5% (5.5%), 5.5% (5.5%), 1.7% (1.7%), 1.7% (1.7%)
- 45-54: 10.7% (10.7%), 10.7% (10.7%), 10.7% (10.7%), 10.7% (10.7%), 10.7% (10.7%), 10.7% (10.7%), 5.5% (5.5%), 5.5% (5.5%), 5.5% (5.5%), 1.7% (1.7%), 1.7% (1.7%)
- 35-44: 8.8% (8.8%), 8.8% (8.8%), 8.8% (8.8%), 8.8% (8.8%), 8.8% (8.8%), 8.8% (8.8%), 5.5% (5.5%), 5.5% (5.5%), 5.5% (5.5%), 1.7% (1.7%), 1.7% (1.7%)
- 25-34: 6.4% (6.4%), 6.4% (6.4%), 6.4% (6.4%), 6.4% (6.4%), 6.4% (6.4%), 6.4% (6.4%), 5.5% (5.5%), 5.5% (5.5%), 5.5% (5.5%), 1.7% (1.7%), 1.7% (1.7%)
- 15-24: 4.6% (4.6%), 4.6% (4.6%), 4.6% (4.6%), 4.6% (4.6%), 4.6% (4.6%), 4.6% (4.6%), 5.5% (5.5%), 5.5% (5.5%), 5.5% (5.5%), 1.7% (1.7%), 1.7% (1.7%)
- <=14: 2.1% (2.1%), 2.1% (2.1%), 2.1% (2.1%), 2.1% (2.1%), 2.1% (2.1%), 2.1% (2.1%), 5.5% (5.5%), 5.5% (5.5%), 5.5% (5.5%), 1.7% (1.7%), 1.7% (1.7%)

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Overview hearing loss prevalence and hearing aid adoption

<table>
<thead>
<tr>
<th></th>
<th>Hearing impaired (stated)</th>
<th>Adoption (% of population)</th>
<th>Adoption (% of stated impaired)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EuroTrak 2015</td>
<td>9,3%</td>
<td>3,2%</td>
<td>34,1%</td>
</tr>
<tr>
<td>EuroTrak 2012</td>
<td>9,4%</td>
<td>2,8%</td>
<td>30,4%</td>
</tr>
<tr>
<td>EuroTrak 2009</td>
<td>10,4%</td>
<td>3,1%</td>
<td>29,8%</td>
</tr>
</tbody>
</table>
Hearing aid adoption rate France: 34% of hearing impaired have hearing aid(s), 70% of them have binaural treatment.
The more severe the hearing loss, the higher the adoption rate

* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:
  - Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
  - Scores on 6 APHAB-EC – like questions (Scaled 1-5)
  - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
  
* People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).
# Hearing loss

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

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Unilateral loss</td>
<td>45% (41%/39%)</td>
<td>23% (24%/29%)</td>
<td>22% (25%/25%)</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>55% (59%/61%)</td>
<td>77% (76%/71%)</td>
<td>44% (42%/33%)</td>
</tr>
</tbody>
</table>

| Perceived loss         |                                                  |                                                  |                          |
|------------------------|                                                  |                                                  |                          |
| Mild                   | 29% (29%/26%)                                    | 6% (5%/6%)                                       | 10% (9%/9%)              |
| Moderate               | 54% (54%/50%)                                    | 49% (47%/46%)                                    | 31% (31%/28%)            |
| Severe                 | 15% (13%/19%)                                    | 37% (39%/36%)                                    | 56% (57%/47%)*           |
| Profound               | 2% (4%/5%)                                       | 8% (9%/12%)                                      |                          |

n’s are unweighted whereas the shown results are weighted

* combined “severe” and “profound” because n is too small
Hearing tests and where hearing is tested
Hearing Tests: 32% (2012: 29%) had a hearing test in the last 5 years, most tests done by ear doctors.

Have you ever taken a hearing test?
- Yes, in the last 12 months: 13%
- Yes, in the last 1-5 years: 19%
- Yes, more than 5 years ago: 17%
- No, never: 51%

Where/how was your hearing tested?
- Ear doctor (ENT): 48%
- Family doctor: 20%
- Hearing Aid Dispenser/Audiologist: 10%
- Online test: 1%
- Test on a smartphone App: 0%
- Other: 25%
- Don't know: 3%

Base=11'734

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The route to the hearing aid: Sources of information and drop-out rates
Doctors and hearing aid dispensers are the most important sources of information and therefore the major gatekeepers – followed by other people with hearing aids.

Where did you gather information about hearing aids? Please check all that apply.

- Family doctor, ear doctor (ENT), Hearing Aid Dispenser, Audiologist: 39% (Hearing loss Total), 64% (Hearing aid)
- Internet research: combined (all three): 16% (Hearing loss Total), 15% (Hearing aid)
- Conversations with friends, relatives already fitted with a hearing aid: 14% (Hearing loss Total), 14% (Hearing aid)
- Print ads received in your mailbox: 11% (Hearing loss Total), 11% (Hearing aid)
- Internet research: websites of hearing aids manufacturers: 10% (Hearing loss Total), 9% (Hearing aid)
- Articles in magazines or newspapers: 9% (Hearing loss Total), 8% (Hearing aid)
- Internet research: other websites, google…: 6% (Hearing loss Total), 6% (Hearing aid)
- Internet research: websites of hearing aid clinics: 4% (Hearing loss Total), 3% (Hearing aid)
- I did not gather information about hearing aids: 7% (Hearing loss Total), 36% (Hearing aid)
- Other: 4% (Hearing loss Total), 3% (Hearing aid)
Of those who discussed the hearing loss with a doctor, 46% talked to an ENT first and 54% talked to the 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 ENT specialist?

- Total n= 979
- Hearing aid (n=467)
- Hearing loss but no hearing aid (n=512)
The route to the hearing aid: Compared to 2012 drop out 3 was reduced slightly

- All hearing impaired: 100%
- Discussed hearing loss with ear doctor and/or family doctor: 74%
- Positive medical advice (Ear doctor or family doctor recommend further action): 48%
- Discussed hearing loss with HA dispenser/audiologist: 41%
- Positive advice HA dispenser/audiologist: 37%
- Bought hearing aid: 34%

Drop out: 2012: 24%
Drop out: 2012: 36%
Drop out: 2012: 29%
Drop out: 2012: 37%

Base: n=1'320
Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*

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).

Base: n=1'320
The route to the hearing aid: GP/Family doctor

Have you discussed your hearing problem with your family doctor?

% Discussed with GP

<table>
<thead>
<tr>
<th>Category</th>
<th>EuroTrak 2015 Base: 1'301</th>
<th>EuroTrak 2012 Base: 1'311</th>
<th>EuroTrak 2009 Base: 1'304</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
<td>54%</td>
<td>63%</td>
<td>60%</td>
</tr>
<tr>
<td>HA owner</td>
<td>76%</td>
<td>80%</td>
<td>75%</td>
</tr>
<tr>
<td>Hearing impaired non-owners</td>
<td>44%</td>
<td>55%</td>
<td>54%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (Base: 298)**
- Referred to a hearing aid dispenser / audiologist: 38%
- Referred to an ear doctor (ENT): 77%
- Recommended to get a hearing aid: 17%
- Recommended no further action: 2%

**Impaired non-owner (Base: 352)**
- Referred to a hearing aid dispenser / audiologist: 17%
- Referred to an ear doctor (ENT): 74%
- Recommended to get a hearing aid: 7%
- Recommended no further action: 13%
The route to the hearing aid: ENT
Have you discussed your hearing problem with an ear doctor (ENT)?

- Total hearing impaired
  - % Discussed with ENT: 68% (2015), 66% (2012), 61% (2009)
  - What did he/she recommend?
    - HA owner (Base: 357)
      - Did prescribe a hearing aid: 65%
      - Referred to a hearing aid dispenser / audiologist: 53%
      - Recommended no further action: 4%
    - Impaired non-owner (Base: 444)
      - Did prescribe a hearing aid: 17%
      - Referred to a hearing aid dispenser / audiologist: 18%
      - Recommended no further action: 67%

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The route to the hearing aid: HA dispenser
Have you discussed your hearing problem with a Hearing Aid Dispenser/Audiologist?

% Discussed with Audiologist

<table>
<thead>
<tr>
<th>Condition</th>
<th>EuroTrak 2015 Base: 1'306</th>
<th>EuroTrak 2012 Base: 1'311</th>
<th>EuroTrak 2009 Base: 1'304</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
<td>41%</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>HA owner</td>
<td>89%</td>
<td>86%</td>
<td>82%</td>
</tr>
<tr>
<td>Hearing impaired non-owners</td>
<td>17%</td>
<td>13%</td>
<td>13%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

- **HA owner (Base: 433)**
  - Recommended to get a hearing aid: 98%
  - Recommended not to get a hearing aid: 2%

- **Impaired non-owner (Base: 128)**
  - Recommended to get a hearing aid: 70%
  - Recommended not to get a hearing aid: 30%
Recommendations by profession

- **GP (N=650)**
  - Referred to an ear doctor (ENT): 75%
  - Referred to a hearing aid dispenser / audiologist: 27%
  - Recommended to get a hearing aid: 12%
  - Recommended no further action: 8%

- **ENT (N=801)**
  - Referred to an ear doctor (ENT): 34%
  - Referred to a hearing aid dispenser / audiologist: 39%
  - Recommended to get a hearing aid: 39%
  - Recommended no further action: 10%

- **Akustiker (N=561)**
  - Referred to an ear doctor (ENT): 90%
  - Referred to a hearing aid dispenser / audiologist: 10%
  - Recommended to get a hearing aid: 10%
  - Recommended no further action: 0%

(EuroTrak 2012 19%)
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality
**Work competitiveness:** 90% of the working hearing aid owners state their hearing aid(s) are useful on their job.

---

**How useful are your hearing aids on your job?**

- 70% Of significant use
- 20% Of some use
- 9% Of no use

Base: N=192
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.

I think that people with an untreated hearing loss tend to be less promoted in their job

I think that people with an untreated hearing loss tend not to get the job they deserve

I think that people with an untreated hearing loss tend to be under salaried

Base: Hearing loss, no hearing aid =600/ hearing aid n=414
**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

### Dementia symptom:
Getting more forgetful in the last year?

*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 (Top 50% hearing loss*), hearing aid owners feel less exhausted in the evenings.

<table>
<thead>
<tr>
<th>Survey Question</th>
<th>Hearing Aid</th>
<th>Top 50% hearing loss, no hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the evenings I often feel physically exhausted</td>
<td>14% 27% 24% 25% 10%</td>
<td>17% 24% 16% 27% 16%</td>
</tr>
<tr>
<td>In the evenings I often feel mentally exhausted</td>
<td>22% 28% 24% 18% 9%</td>
<td>25% 22% 15% 24% 13%</td>
</tr>
</tbody>
</table>

*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?

<table>
<thead>
<tr>
<th></th>
<th>Top 50% hearing loss, no hearing aid (n=144)</th>
<th>Hearing aid (n=353)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>No</strong></td>
<td>47%</td>
<td>40%</td>
</tr>
<tr>
<td><strong>Yes</strong></td>
<td>53%</td>
<td>60%</td>
</tr>
</tbody>
</table>
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 and moderate hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profound</td>
<td>(4%)</td>
<td>56%*</td>
</tr>
<tr>
<td>Severe</td>
<td>(22%)</td>
<td>59%*</td>
</tr>
<tr>
<td>Moderate</td>
<td>(52%)</td>
<td>47%*</td>
</tr>
<tr>
<td>Mild</td>
<td>(21%)</td>
<td>36%</td>
</tr>
</tbody>
</table>

*combined “severe” and “profound” because n is too small

Base: n=1’320
Sums can differ from 100% due to rounding
63% of the currently owned HAs were fitted in 2012 or later

**Year of purchase**

<table>
<thead>
<tr>
<th>Year of purchase</th>
<th>2015 (n=485)</th>
<th>2012 (n=502)</th>
<th>2009 (n=501)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014/15</td>
<td>24%</td>
<td>48%</td>
<td>58%</td>
</tr>
<tr>
<td>2013</td>
<td>36%</td>
<td>63%</td>
<td>68%</td>
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<td>2012</td>
<td>21%</td>
<td>74%</td>
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<td>2011</td>
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<td>2010</td>
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<td>2008</td>
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<td>93%</td>
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<tr>
<td>2007</td>
<td>21%</td>
<td>93%</td>
<td>95%</td>
</tr>
<tr>
<td>2006</td>
<td>21%</td>
<td>95%</td>
<td>97%</td>
</tr>
<tr>
<td>2005</td>
<td>21%</td>
<td>98%</td>
<td>98%</td>
</tr>
<tr>
<td>2004</td>
<td>21%</td>
<td>98%</td>
<td>98%</td>
</tr>
<tr>
<td>2003</td>
<td>21%</td>
<td>98%</td>
<td>98%</td>
</tr>
<tr>
<td>2002</td>
<td>21%</td>
<td>98%</td>
<td>98%</td>
</tr>
<tr>
<td>2001 or earlier</td>
<td>21%</td>
<td>98%</td>
<td>98%</td>
</tr>
</tbody>
</table>

**Age of currently owned HAs (Mean):**

- 2015: 2.9 years
- 2012: 2.5 years
- 2009: 2.9 years
On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 6 years before they are being replaced.

**Current HAs = first HAs?**

- 2012: 68%
- Yes
- 64%
- No
- 36%

**How many years did you own your previous HAs?**

- 1-3 years: 12%
- 4-6 years: 50%
- 7-10 years: 30%
- 11 years or longer: 9%

**Age of HA before it has been replaced:**
- 2015: 6 years (median)
- 2012: 5 years (median)

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

- 1 year: 20%
- 2 years: 20%
- 3 years: 23%
- 4-6 years: 21%
- more than 6 years: 16%

Base: n=328
Monaural-binaural treatment by purchase date

<table>
<thead>
<tr>
<th>Year of purchase</th>
<th>% ownership of binaural hearing aids / Base=All owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013/2014 (n=249 EuroTrak 2015)</td>
<td>70%</td>
</tr>
<tr>
<td>2012/2011 (n=170)</td>
<td>74%</td>
</tr>
<tr>
<td>2010 (n=117)</td>
<td>60%</td>
</tr>
<tr>
<td>2009 or earlier (n=478, EuroTrak 2009)</td>
<td>58%</td>
</tr>
</tbody>
</table>
Most hearing aid owners know that fitting and after sales services are included in the overall costs, but only 51% are aware that this counts throughout the lifetime of the hearing aid(s).

A votre avis, que comprend le prix que vous avez payé pour votre (vos) appareil(s) auditifs(s) ?

- Le prix du (des) appareil(s), de l'adaptation personnalisée et du suivi illimité gratuit pendant sa (leur) durée de fonctionnement. 51%
- Le prix du (des) appareil(s), de l'adaptation personnalisée et du suivi gratuit pendant la période de garantie 32%
- Le prix du (des) appareil(s) et de l'adaptation personnalisée. 7%
- Le prix du (des) appareil(s) uniquement 3%
- Ne sait pas 7%

Le prix de votre/vos appareil(s) auditif(s) inclus un nombre illimité de visites de réglage chez votre Audioprothésistes durant sa (leur) durée de fonctionnement. Quelle est votre degré de satisfaction en regard de ce mode de tarification « forfaitaire » ?

- Très mécontent 3%
- Mécontent 7%
- Un peu mécontent 10%
- Sans opinion 13%
- Un peu satisfait 37%
- Satisfait 28%

HA-owner, n=501

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While a majority of hearing impaired without hearing aids don’t know whether a third party would pay any part of hearing aids - 81% of the hearing aid owners received some kind of 3rd party reimbursement.

**2015**

**Owners:** Was any part or all of your hearing aid(s) paid for by a third party? (Insurance, Government, ...)

- Yes, completely (2012:15%)
- Yes, partly (2012: 62%)
- No (2012: 21%)
- don't know (2012:2%)

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

- Yes (2012: 32%)
- No (2012: 30%)
- don't know (2012:38%)
On average, HAs are worn 8.6 hours a day

How many hours a day are HA worn? (cum. %)

HA-owner:
2015: n=501
2012: n=502
2009: n=501

HA worn:
2015 Mean: 8.6 hours/day
2012 Mean: 9.2 hours/day
2009 Mean: 8.3 hours/day
Only 40% of today’s hearing aid owners are aware of their hearing aid brand

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

- Yes, I know it by heart: 40%
- No, but I could find out: 19%
- No, and can't find out: 41%

In case you plan to obtain new hearing aid(s), what brand would you choose?

- Preferably from the same brand you currently own: 6%
- Preferably from a different brand than you currently own: 46%
- Indifferent, could be any brand: 49%

Base: N=501 / 399

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77% of the currently owned HAs either had no repair need or only once

How often has your current hearing aid required a repair because it was not working properly?

<table>
<thead>
<tr>
<th>Year</th>
<th>Never</th>
<th>Once</th>
<th>2-3 times</th>
<th>4-5 times</th>
<th>More often</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>47%</td>
<td>30%</td>
<td>16%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>2012</td>
<td>54%</td>
<td>24%</td>
<td>13%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>2009</td>
<td>54%</td>
<td>20%</td>
<td>18%</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

HA-owner:
2015: n=501
2012: n=502
2009: n=501

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Awareness and usage of accessories and Telecoil
TV Box is the most often owned electronic accessory: 8% of hearing aid owners have one – 40% have heard of it but don’t own one.

Which of the following accessories have you heard of and which ones do you own?

<table>
<thead>
<tr>
<th>Accessory</th>
<th>Never heard of this before</th>
<th>Heard of this before but don’t own one</th>
<th>I own one</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV Box connected to the tv set to stream audio to your hearing aid</td>
<td>40%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Audio streamer to connect my hearing aids to other devices like cell phones, mp3 players, tv sets, etc</td>
<td>37%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Additional microphone for conversations with one person, conversations in a group etc.</td>
<td>33%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Phone clip, plugged into the mobile phone to stream calls to the hearing aid</td>
<td>36%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Combined device - audio streamer and remote control in one device</td>
<td>36%</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

Base: N=501
22% of hearing aid owners know what Telecoil is but only 7% have used it – mainly in a conference room. Most of those who use it are satisfied.

**Have you seen this logo before?**
- Yes, and I know what it stands for: 22%
- Yes, but I don't know what it stands for: 39%
- No, have never seen this: 39%

**On what type of venues have you used hearing aids in a hearing loop (Telecoil)?**
- Conference room: 53%
- Home: 37%
- Theater, auditorium: 30%
- House of worship/church: 29%
- Airport, train station: 7%
- Drive thru, ticket window, bank counter: 5%
- Court room: 4%
- School, university: 1%

**Are your hearing aids equipped with Telecoil?**
- Yes, and I have already used Telecoil: 7%
- Yes, but have never used it: 9%
- No: 50%
- I don't know: 34%

**How satisfied are you with the use of Telecoil overall?**
- Very dissatisfied: 2%
- Dissatisfied: 10%
- Somewhat dissatisfied: 10%
- Neutral: 14%
- Somewhat satisfied: 18%
- Satisfied: 41%
- Very satisfied: 6%

HA-owner, n=501

HA-owner, who have used Telecoil, n=32
Satisfaction with hearing aids and drivers
72% of the hearing aid owners say their hearing aid works better than or as expected

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

- 52% hearing aids work better than I expected
- 20% hearing aids work as I expected
- 27% hearing aids work worse than I expected

Base: N=501
Overall satisfaction with HA increased from 80% to 84% since 2012

Overall satisfaction with HA increased from 80% to 84% since 2012.

### % Satisfied

<table>
<thead>
<tr>
<th>Year</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total HA-user (n=501)</td>
<td>84%</td>
<td>80%</td>
<td>86%</td>
</tr>
<tr>
<td>BTE (n=226)</td>
<td>86%</td>
<td>85%</td>
<td>84%</td>
</tr>
<tr>
<td>ITE (n=77)</td>
<td>77%</td>
<td>81%</td>
<td>92%</td>
</tr>
<tr>
<td>ITC (n=162)</td>
<td>83%</td>
<td>77%</td>
<td>89%</td>
</tr>
<tr>
<td>up to two years old (n=249)</td>
<td>87%</td>
<td>86%</td>
<td>-</td>
</tr>
<tr>
<td>older than 2 years (n=236)</td>
<td>83%</td>
<td>76%</td>
<td>-</td>
</tr>
<tr>
<td>HA worn up to 4 hrs/day (n=88)</td>
<td>61%</td>
<td>50%</td>
<td>64%</td>
</tr>
<tr>
<td>HA worn 4-8 hrs/day (n=156)</td>
<td>83%</td>
<td>82%</td>
<td>90%</td>
</tr>
<tr>
<td>HA worn more than 8 hrs/day (n=257)</td>
<td>93%</td>
<td>87%</td>
<td>92%</td>
</tr>
</tbody>
</table>
Overall Satisfaction with HA: Country comparison

<table>
<thead>
<tr>
<th></th>
<th>France</th>
<th>Switzerland</th>
<th>UK</th>
<th>Denmark</th>
<th>Norway</th>
<th>Italy</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall satisfaction 2012</td>
<td>80%</td>
<td>84%</td>
<td>72%</td>
<td>70%</td>
<td>72%</td>
<td>70%</td>
<td>36%</td>
</tr>
<tr>
<td>Overall satisfaction 2015</td>
<td>84%</td>
<td>81%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Satisfaction with current hearing aids

**Dispenser**
- Professionalism of dispenser: 87%
- Quality of dispensers counseling: 85%
- Quality of service after purchase: 84%
- Quality of service during hearing aid fitting period: 83%

**Sound quality**
- Clarity of tone and sound: 78%
- Natural sounding: 78%
- Richness or fidelity of sound: 78%
- Comfort with loud sounds: 77%

**Product features**
- Ease of changing battery: 87%
- Reliability: 84%
- Overall fit/Comfort: 82%
- Visibility to others: 78%
- Managing whistling/feedback/buzzing: 77%
- Battery life: 75%
- Value (performance versus money spent): 60%

* % of satisfied HA owners compared to EuroTrak 2012

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Satisfaction with current hearing aids

Listening situation

- Listening to Music
- At home with family members
- Conversation with one Person
- Outdoors
- Conversation in small groups
- Watching TV
- Leisure activities
- When talking to children
- In a store, when shopping
- When riding in a car
- Conversation in large groups
- On the telephone

** In a larger lecture hall (e.g., theater, concert hall, ...)
- At a movie theater
- Use in noisy situations
- In the workplace
- In school or a classroom (as an observer or student)

<table>
<thead>
<tr>
<th>Listening situation</th>
<th>% dissatisfied</th>
<th>% satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listening to Music</td>
<td>8%</td>
<td>83%</td>
</tr>
<tr>
<td>At home with family members</td>
<td>9%</td>
<td>83%</td>
</tr>
<tr>
<td>Conversation with one Person</td>
<td>11%</td>
<td>83%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>10%</td>
<td>82%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>13%</td>
<td>80%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>12%</td>
<td>80%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>8%</td>
<td>77%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>10%</td>
<td>77%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>10%</td>
<td>76%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>10%</td>
<td>76%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>19%</td>
<td>75%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>16%</td>
<td>75%</td>
</tr>
<tr>
<td>** In a larger lecture hall (e.g., theater, concert hall, ...)</td>
<td>13%</td>
<td>73%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>9%</td>
<td>71%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>25%</td>
<td>68%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>9%</td>
<td>58%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>12%</td>
<td>52%</td>
</tr>
</tbody>
</table>

*Trend*

<table>
<thead>
<tr>
<th>% dissatisfied</th>
<th>% satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>+3%</td>
<td>83%</td>
</tr>
<tr>
<td>-7%</td>
<td>83%</td>
</tr>
<tr>
<td>+1%</td>
<td>82%</td>
</tr>
<tr>
<td>-3%</td>
<td>80%</td>
</tr>
<tr>
<td>+4%</td>
<td>77%</td>
</tr>
<tr>
<td>0%</td>
<td>76%</td>
</tr>
<tr>
<td>-1%</td>
<td>75%</td>
</tr>
<tr>
<td>+5%</td>
<td>73%</td>
</tr>
<tr>
<td>+2%</td>
<td>68%</td>
</tr>
</tbody>
</table>

* % of satisfied HA owners compared to EuroTrak 2012
** question slightly changed: 2012=Understanding a lecture in a large public place

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

| Dispenser | Quality of service after purchase | 0.65 |
| Quality of dispensers counseling | 0.65 |
| Professionalism of dispenser | 0.63 |
| Quality of service during hearing aid fitting period | 0.63 |
| Sound quality signal process. | Natural sounding | 0.76 |
| Richness or fidelity of sound | 0.75 |
| Clearness of tone and sound | 0.74 |
| Comfort with loud sounds | 0.73 |
| Product features | Reliability | 0.75 |
| Overall fit/ Comfort | 0.74 |
| Managing whistling/feedback/buzzing | 0.66 |
| Visibility to others | 0.65 |
| Ease of changing battery | 0.58 |
| Value (performance versus money spent) | 0.53 |
| Battery life | 0.50 |

*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction; 1 means a maximal relationship. Read: richness or fidelity of sound is the most important criterion for satisfaction.*
Important listening situations

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

- At home with family members: 58%
- When talking on a phone: 51%
- In conversations with large groups: 46%
- In conversations with 1 person: 46%
- When watching TV with others: 39%
- In conversations with small groups: 33%
- In noisy situations: 26%
- In the workplace: 22%
- In a larger lecture hall (e.g., theater, concert hall, place of worship, etc.): 17%
- Outdoors: 14%
- When talking to children: 13%
- When riding in a car: 12%
- When listening to music: 12%
- At a movie theater: 9%
- In school or a classroom (as an observer or student): 6%
- In a store, when shopping: 6%
- During leisure activities (e.g., exercising, taking a walk, etc.): 5%

Hearing loss Total (n=1320)
Hearing aid (n=501)
Hearing loss but no hearing aid (n=819)
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially communication effectiveness, social life, participating in group activities and relationships at home improve with hearing aids.

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

<table>
<thead>
<tr>
<th>Area</th>
<th>a lot worse</th>
<th>worse</th>
<th>the same</th>
<th>better</th>
<th>a lot better</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall ability to communicate more effectively in most...</td>
<td>9%</td>
<td>25%</td>
<td>46%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Social life</td>
<td>6%</td>
<td>35%</td>
<td>39%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Ability to participate in group activities</td>
<td>6%</td>
<td>35%</td>
<td>39%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Relationships at home</td>
<td>8%</td>
<td>39%</td>
<td>33%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Sense of independence</td>
<td>8%</td>
<td>42%</td>
<td>34%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Sense of safety</td>
<td>6%</td>
<td>48%</td>
<td>31%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Confidence in yourself</td>
<td>5%</td>
<td>49%</td>
<td>32%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Relationships at work</td>
<td>9%</td>
<td>46%</td>
<td>29%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Mental/emotional health</td>
<td>7%</td>
<td>54%</td>
<td>26%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Feelings about yourself</td>
<td>5%</td>
<td>55%</td>
<td>27%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Mental ability</td>
<td>4%</td>
<td>61%</td>
<td>26%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Physical health</td>
<td>5%</td>
<td>63%</td>
<td>20%</td>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>

HA-owner, n=501
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in most aspects.
Even 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?

- Communication with Person: 11% a lot worse, 36% worse, 32% the same, 20% better
- Social activities together with Person: 7% a lot worse, 45% worse, 29% the same, 15% better
- Personal relationship with Person: 6% a lot worse, 51% worse, 24% the same, 16% better
- Quarrels/disputes with Person: 7% a lot worse, 63% worse, 15% the same, 13% better

Someone in HH / parent has HA, n=405
96% 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?

- 50%
- 36%
- 10%
- 4%

Never
Rarely
Occasionally
Regularly

Base: N=501
4. Analysis of hearing impaired non-owners
Reasons for not having hearing aids and why some people can consider hearing aids as uncomfortable
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

<table>
<thead>
<tr>
<th></th>
<th>% HA Owner (n=491)</th>
<th>%HA-Non-owner Low 50% HL (n=435)</th>
<th>%HA-Non-owner Top 50% HL (n=219)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>23%</td>
<td>50%</td>
<td>34%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>77%</td>
<td>50%</td>
<td>66%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>6%</td>
<td>36%</td>
<td>1%</td>
</tr>
<tr>
<td>Moderate</td>
<td>49%</td>
<td>57%</td>
<td>55%</td>
</tr>
<tr>
<td>Severe</td>
<td>37%</td>
<td>5%</td>
<td>39%</td>
</tr>
<tr>
<td>Profound</td>
<td>8%</td>
<td>1%</td>
<td>5%</td>
</tr>
</tbody>
</table>

More similar hearing loss structure
Top 10 reasons for not having a hearing aid (I/II)

- Cannot afford a hearing aid
  - Reason: 60%
  - Somewhat a reason: 16%
  - Not a reason: 24%

- Have more serious priorities
  - Reason: 42%
  - Somewhat a reason: 16%
  - Not a reason: 41%

- Ear doctors opinion (ENT)
  - Reason: 41%
  - Somewhat a reason: 19%
  - Not a reason: 41%

- Hearing loss not severe enough
  - Reason: 23%
  - Somewhat a reason: 32%
  - Not a reason: 44%

- Hear well enough in most situations
  - Reason: 25%
  - Somewhat a reason: 31%
  - Not a reason: 44%

- Family doctors opinion (GP)
  - Reason: 35%
  - Somewhat a reason: 21%
  - Not a reason: 44%

- They do not restore your hearing to normal
  - Reason: 33%
  - Somewhat a reason: 19%
  - Not a reason: 48%

- Have hearing loss only with high pitch sounds
  - Reason: 29%
  - Somewhat a reason: 22%
  - Not a reason: 49%

- They do not work well in noisy situations
  - Reason: 34%
  - Somewhat a reason: 16%
  - Not a reason: 50%

- Uncomfortable
  - Reason: 31%
  - Somewhat a reason: 18%
  - Not a reason: 51%

Base: non owners Top 50% HL: n=219

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Not a reason</th>
<th>Somewhat a reason</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Another hearing aid owners opinion</td>
<td>55%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>61%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>62%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>63%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>64%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>64%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bad design</td>
<td>66%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>67%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>69%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>71%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td>73%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>73%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do not trust Hearing Aid Dispenser/Audiologist</td>
<td>76%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>77%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Had surgery - hearing aids wont help</td>
<td>80%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>84%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=219
Top 10 reasons for HA owners NOT using them

- Have tried hearing aid and they do not work: 63% Reason, 21% Somewhat a reason, 17% Not a reason
- Social / Family opinion such as child, spouse, friend: 48% Reason, 24% Somewhat a reason, 27% Not a reason
- Hearing loss not severe enough: 29% Reason, 38% Somewhat a reason, 33% Not a reason
- Have hearing loss only with high pitch sounds: 5% Reason, 56% Somewhat a reason, 39% Not a reason
- Have sensorineural hearing loss (nerve deafness): 21% Reason, 40% Somewhat a reason, 39% Not a reason
- Have tinnitus (ringing in ears): 6% Reason, 54% Somewhat a reason, 41% Not a reason
- They do not work well in noisy situations: 20% Reason, 37% Somewhat a reason, 43% Not a reason
- Hearing problem requires surgery: 9% Reason, 42% Somewhat a reason, 49% Not a reason
- They do not restore your hearing to normal: 9% Reason, 42% Somewhat a reason, 49% Not a reason
- Have more serious priorities: 16% Reason, 34% Somewhat a reason, 50% Not a reason

Owners who don't use, n=23
Meaning of «uncomfortable» (open question)

You mentioned "uncomfortable" as a reason why you don't own/use hearing aid(s). Please describe in detail why you consider hearing aids uncomfortable.

- foreign object in the ear, it pinches, it hurts, too big: 57%
- uncomfortable in general: 13%
- uncomfortable noises, feedback, etc.: 9%
- taking it on and off, adjusting: 4%
- uncomfortable with glasses: 4%
- others say it is uncomfortable: 3%
- not suited for certain activities (sports, swimming...): 3%
- changing batteries: 3%
- maintenance, cleaning: 3%
- afraid of losing it: 3%
- other: 9%

Base: n=288

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Social rejection because of hearing loss compared to the acceptance of hearing aids
87% of hearing aid owners think people don’t make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

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

- Never: 15%
- Rarely: 9%
- Occasionally: 3%
- Regularly: 72%

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

- Never: 32%
- Rarely: 31%
- Occasionally: 2%
- Regularly: 34%

Base: N=501

Base: Top 50% hearing loss, no hearing aid N=219
Buying intentions and most important triggers to buy
8% (2012:7%) of non-owners intend to get a hearing aid within the next year. Re-buying intention is higher than first-buying intention.
The most important influencing factors are worsening hearing loss, ENT and significant others (and: price for non owners & audiologist for owners)

**Non-owner:** Think about the option to obtain / purchase a hearing aid. What do you think would influence you to obtain / purchase a hearing aid?

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

- Hearing loss got worse
- ENT/ Ear Doctor
- Price of hearing aid
- Hearing aid dispenser / Audiologist
- Spouse
- Free due to coverage by Insurance / Received hearing aid...
- GP /Family doctor
- Child
- Financial Situation improved
- Safety concerns
- Relative, friend
- Another hearing aid owner (word of mouth)
- Information/advice about hearing loss from consumer...
- Hearing loss article or literature
- Magazine advertisement
- TV advertisement
- Internet: Websites of hearing aids manufacturers
- Co-worker or boss
- Newspaper advertisement
- Internet: Other websites, google...
- Radio advertisement
- Direct mail piece
- Telemarketing phone call
- Internet: Websites of hearing aid clinics
- Celebrity or public Personality

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The most important trigger to buy a hearing aid is worsening hearing loss, the dispenser and the ENT.

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing loss got worse</td>
<td>26%</td>
</tr>
<tr>
<td>Hearing aid dispenser / Audiologist</td>
<td>22%</td>
</tr>
<tr>
<td>ENT/ Ear Doctor</td>
<td>20%</td>
</tr>
<tr>
<td>Spouse</td>
<td>10%</td>
</tr>
<tr>
<td>Friend / relative</td>
<td>4%</td>
</tr>
<tr>
<td>Child</td>
<td>3%</td>
</tr>
<tr>
<td>Price of hearing aid</td>
<td>3%</td>
</tr>
<tr>
<td>GP /Family doctor</td>
<td>2%</td>
</tr>
<tr>
<td>Financial Situation improved</td>
<td>1%</td>
</tr>
<tr>
<td>Hearing loss article or literature</td>
<td>1%</td>
</tr>
<tr>
<td>Free due to coverage by Insurance / Received hearing aid free of charge</td>
<td>1%</td>
</tr>
</tbody>
</table>

Hearing aid owner (n=505)
Stefan Ruf lic. rer. pol.
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Email   stefan.ruf@anovum.com
www.anovum.com

Christian Egger lic. phil.
Anovum GmbH
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CH-8006 Zürich
Telefon  +41 (0)44 576 76 78
Mobil   +41 (0)76 318 57 51
E-Mail   christian.egger@anovum.com
www.anovum.com

EHIMA
Soeren Hougaard
EHIMA secretary general
Phone: (+45) 4045 7135
Email: sh@ehima.com
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 of an interval +-3.1 around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

<table>
<thead>
<tr>
<th>Sample size</th>
<th>Random sample error</th>
<th>Real value is within interval:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Level of proportion: 50%/50%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Level of proportion: 15%/85%</td>
</tr>
<tr>
<td>50</td>
<td>+- 13.9</td>
<td>+- 9.9</td>
</tr>
<tr>
<td>100</td>
<td>+- 9.8</td>
<td>+- 7.0</td>
</tr>
<tr>
<td>250</td>
<td>+- 6.2</td>
<td>+- 4.4</td>
</tr>
<tr>
<td>500</td>
<td>+- 4.4</td>
<td>+- 3.1</td>
</tr>
<tr>
<td>1000</td>
<td>+- 3.1</td>
<td>+- 2.2</td>
</tr>
<tr>
<td>5’000</td>
<td>+- 1.4</td>
<td>+- 1.0</td>
</tr>
<tr>
<td>10’000</td>
<td>+- 1.0</td>
<td>+- 0.7</td>
</tr>
</tbody>
</table>
### Demographics (1) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%*

<table>
<thead>
<tr>
<th></th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>7253</td>
<td>10.1%</td>
<td>32.0%</td>
<td>48.5%</td>
<td>54.8%</td>
<td>50.0%</td>
</tr>
<tr>
<td>Female</td>
<td>7571</td>
<td>8.5%</td>
<td>36.3%</td>
<td>51.5%</td>
<td>45.2%</td>
<td>50.0%</td>
</tr>
<tr>
<td><strong>Age recoded</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>2772</td>
<td>1.7%</td>
<td>43.4%</td>
<td>20.3%</td>
<td>2.9%</td>
<td>4.4%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1757</td>
<td>3.2%</td>
<td>23.7%</td>
<td>12.6%</td>
<td>4.8%</td>
<td>2.9%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1817</td>
<td>4.9%</td>
<td>30.2%</td>
<td>12.8%</td>
<td>6.9%</td>
<td>5.8%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1918</td>
<td>5.5%</td>
<td>26.0%</td>
<td>13.5%</td>
<td>8.6%</td>
<td>5.9%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>1985</td>
<td>7.9%</td>
<td>13.0%</td>
<td>13.6%</td>
<td>15.0%</td>
<td>4.3%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1858</td>
<td>12.3%</td>
<td>30.2%</td>
<td>12.1%</td>
<td>17.6%</td>
<td>14.7%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1352</td>
<td>18.0%</td>
<td>36.2%</td>
<td>8.2%</td>
<td>17.1%</td>
<td>18.8%</td>
</tr>
<tr>
<td>74+</td>
<td>1363</td>
<td>33.0%</td>
<td>45.2%</td>
<td>6.8%</td>
<td>27.1%</td>
<td>43.3%</td>
</tr>
<tr>
<td><strong>Type of household</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>single household</td>
<td>1512</td>
<td>16.7%</td>
<td>39.3%</td>
<td>9.4%</td>
<td>16.8%</td>
<td>21.1%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>4082</td>
<td>13.9%</td>
<td>37.7%</td>
<td>26.1%</td>
<td>38.9%</td>
<td>45.5%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>7219</td>
<td>5.0%</td>
<td>25.9%</td>
<td>51.0%</td>
<td>29.7%</td>
<td>20.1%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>911</td>
<td>6.1%</td>
<td>26.7%</td>
<td>6.4%</td>
<td>4.5%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>147</td>
<td>34.0%</td>
<td>48.0%</td>
<td>0.7%</td>
<td>2.9%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Other</td>
<td>953</td>
<td>9.4%</td>
<td>26.7%</td>
<td>6.4%</td>
<td>7.2%</td>
<td>5.1%</td>
</tr>
</tbody>
</table>

* Small sample sizes in some categories
### Demographics (2) Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th>Profiles: Categories add to 100%*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Count</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td><strong>Status</strong></td>
</tr>
<tr>
<td>The head of the household (alone or together with someone)</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
</tr>
<tr>
<td>Other Person</td>
</tr>
<tr>
<td><strong>Employment</strong></td>
</tr>
<tr>
<td>Full time employed</td>
</tr>
<tr>
<td>Part time employed</td>
</tr>
<tr>
<td>Unemployed / not working</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
</tr>
<tr>
<td><strong>Education</strong></td>
</tr>
<tr>
<td>Brevet</td>
</tr>
<tr>
<td>CAP-BEP</td>
</tr>
<tr>
<td>Baccalauréats</td>
</tr>
<tr>
<td>BTS - DUT</td>
</tr>
<tr>
<td>License (BAC+3)</td>
</tr>
<tr>
<td>Master 1 et 2 - Diplôme d’Ingénieur</td>
</tr>
<tr>
<td>Docteur</td>
</tr>
<tr>
<td>Autre</td>
</tr>
</tbody>
</table>

* Small sample sizes in some categories