Results

EuroTrak UK 2015

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

• The data reveals a relatively stable picture of prevalence, adoption rate and satisfaction with hearing aids.

• The survey reveals interesting new topics, such as:
  – Improved quality of sleep
  – Tremendous satisfaction with regard to improved quality of life.
  – Contrasts in bullying and teasing experiences for people with and without hearing aids.
  – Confirmation that people with hearing aids are less at risk of developing depressive symptoms, less inclined to forgetfulness and less “worn out” in the evenings, physically and mentally.

• Hearing aids are not only good for correcting hearing loss, but in fact contribute to better and more active lives, better quality of life, and better overall health.
Executive Summary; key findings.

- 81% of the hearing aid owners say their hearing aid works better than or as expected
- 70% (2012:72%) of the HA owners are satisfied with their HAs.
- The more hours worn per day, the higher the satisfaction.
- Hearing aids adoption is increasing it is now 42.4% of people who would benefit. The UK is at the top of the league.
- The majority of people (61%) agree that over 55s should have their hearing checked annually.
- **Work competitiveness:** 81% of the working hearing aid owners state their hearing aid(s) are useful on their job.
- **Work competitiveness:** People with hearing aids recognise that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to improve salary.
- **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.
- **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
- **General health problems:** Quality of sleep seems to improve if hearing impaired use hearing aids
- Even for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids
- 80% 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.

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Summary

1. Introduction

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

- Sample sizes UK 2015:
  - Representative sample (sample 1): n=14’473 people
  - Hearing impaired (sample 2):
    - Hearing impaired non-owners: n= 720 people with hearing loss (HL)
    - HA owners: n= 605 people with hearing aid (HA)

- EuroTrak UK 2015 is part of the EuroTrak studies:

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Summary

2. Market overview

- **Stated hearing loss prevalence**
  - Total: 9.7%, 18+: 11.7% (2012: 9.1%, 18+: 10.7%).
  - Binaural hearing loss: HA owners: 78%, HA non-owners: 58%.
  - Hearing Tests: 27% (2012: 26%) had a hearing test in the last 5 years, most tests done by hospital audiologists and family doctors

- **Hearing aid adoption rate (HA penetration)**
  - Total: 42.4% (2012: 41.1%).
  - Total age group 18+: 42.7% (2012: 42.2%).
  - 61% of HA owners have binaural treatment.

- **The route to the hearing aid**
  - 64% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 50% got hearing aids recommended from the ENT or family doctor (drop out rate=22% / 2012: 23%).
  - 40% of the GP consultations referred to a hearing aid dispenser (2012: 38%).
  - 45% (2012:49%) of the GP consultations referred to an ENT, 13% (2012: 13%) recommended no action.
  - 42% of ENT consultations referred to an audiologist, 23% (2012: 26%) 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.
Summary

3. Analysis of hearing aid owners

- Hearing aid ownership and usage, accessories and Telecoil
  - 83% received NHS hearing devices (2012: 84%).
  - 79% of the currently owned HAs were acquired in the last three years (2012: 79%).
  - The average age of the currently owned HAs is 2.1 years (2012: 2.1 years).
  - The median age of hearing aids before replacement is 4 years.
  - On average, HAs are worn 8.1 hours a day (2012: 8.3).
  - 25% of today’s hearing aid owners are aware of their hearing aid brand, 33% would preferably choose the same brand if they would plan to obtain new hearing aids (57% are indifferent).
  - TV Box is the most often owned electronic accessory: 6% of hearing aid owners have one – 24% have heard of it but don’t own one.
  - 64% of hearing aid owners know what Telecoil is but only 18% have used it – mainly in a theatre/auditorium. Most of those who use it are satisfied.

- Importance of listening situations and satisfaction with HAs
  - 81% of the hearing aid owners say their hearing aid works better than or as expected
  - 70% (2012: 72%) of the HA owners are satisfied with their HAs.
  - The more hours worn per day, the higher the satisfaction.
  - Talking at home with family members, talking on a phone and watching TV with others are the most frequent important listening situations.

- Positive impact of HAs
  - Significant positive impact of HAs on different aspects – especially communication, participation in group activities and self confidence.
  - 92% 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 21% (2012: 25%) 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 that the hearing loss is not severe enough, they argue hearing aids are uncomfortable and they would be embarrassed to wear one.
  - 11% who own HAs don’t use them at all (0 hour); 19% use them less than one hour/day (0-1 hour).

- **Social rejection, buying intentions and triggers to buy**
  - 80% 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 are worsening of hearing, GP, NHS audiologist and ENT. Insurance coverage/price of hearing aids is among the top reasons for the non owners only.
  - 13% (2012: 12%) of non-owners intend to get a hearing aid within the next year.
Results

**EuroTrak UK 2015**

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

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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 – UK/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

<table>
<thead>
<tr>
<th>Step 1: Screening interviews</th>
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<tbody>
<tr>
<td><strong>Objective:</strong> Prevalence of hearing loss and hearing aid ownership</td>
</tr>
<tr>
<td><strong>Process:</strong></td>
</tr>
<tr>
<td>1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)</td>
</tr>
<tr>
<td>2. Contacts from panelist pools of more than 40’000 people</td>
</tr>
<tr>
<td>3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics</td>
</tr>
<tr>
<td>4. Result: Representative sample of <strong>n=14’473</strong> people based on census data.</td>
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<thead>
<tr>
<th>Step 2: Target population interviews</th>
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<tbody>
<tr>
<td><strong>Objective:</strong> Details about satisfaction with hearing aids and reasons for non-adoption</td>
</tr>
<tr>
<td><strong>Process:</strong></td>
</tr>
<tr>
<td>1. Main questionnaires: Owners and hearing impaired non-owners</td>
</tr>
<tr>
<td>2. Balancing through weighting according to representative screening interviews</td>
</tr>
<tr>
<td>3. Resulting sample: <strong>n=720</strong> hearing aid owners and <strong>n=605</strong> hearing impaired non-owners</td>
</tr>
</tbody>
</table>
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age
Hearing loss prevalence UK

% hearing loss prevalence

- Total
  - EuroTrak 2015: 9.7%
  - EuroTrak 2012: 9.1%
  - EuroTrak 2009: 9.5%
- Total 18+
  - EuroTrak 2015: 11.7%
  - EuroTrak 2012: 10.7%
  - EuroTrak 2009: 11.5%
- 74+
  - EuroTrak 2015: 40.4%
  - EuroTrak 2012: 40.4%
- 65-74
  - EuroTrak 2015: 20.4%
  - EuroTrak 2012: 19.3%
  - EuroTrak 2009: 19.9%
- 55-64
  - EuroTrak 2015: 19.3%
  - EuroTrak 2012: 18.2%
  - EuroTrak 2009: 17.7%
- 45-54
  - EuroTrak 2015: 14.9%
  - EuroTrak 2012: 14.0%
  - EuroTrak 2009: 13.5%
- 35-44
  - EuroTrak 2015: 10.1%
  - EuroTrak 2012: 9.5%
  - EuroTrak 2009: 9.2%
- 25-34
  - EuroTrak 2015: 8.0%
  - EuroTrak 2012: 7.5%
  - EuroTrak 2009: 7.2%
- 15-24
  - EuroTrak 2015: 6.1%
  - EuroTrak 2012: 5.8%
  - EuroTrak 2009: 5.5%
- <=14
  - EuroTrak 2015: 1.7%
  - EuroTrak 2012: 1.5%
  - EuroTrak 2009: 1.3%

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Overview hearing loss prevalence and hearing aid adoption

<table>
<thead>
<tr>
<th></th>
<th>EuroTrak 2015</th>
<th>EuroTrak 2012</th>
<th>EuroTrak 2009</th>
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</thead>
<tbody>
<tr>
<td>Hearing impaired (stated)</td>
<td>9,7%</td>
<td>9,1%</td>
<td>9,5%</td>
</tr>
<tr>
<td>Adoption (% of population)</td>
<td>4,1%</td>
<td>3,7%</td>
<td>3,7%</td>
</tr>
<tr>
<td>Adoption (% of stated impaired)</td>
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Hearing aid adoption rate UK:
42% of hearing impaired have hearing aid(s), 61% of them have binaural treatment.
The more severe the hearing loss, the higher the adoption rate

Hearing loss 6-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).
## Hearing loss characteristics: Owners compared to non-owners

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<tr>
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<tbody>
<tr>
<td><strong>Unilateral loss</strong></td>
<td>42% (44%/46%)</td>
<td>22% (24%/33%)</td>
<td>30% (30%/32%)</td>
</tr>
<tr>
<td><strong>Bilateral loss</strong></td>
<td>58% (57%/54%)</td>
<td>78% (76%/67%)</td>
<td>52% (51%/45%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Perceived loss</th>
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<tbody>
<tr>
<td><strong>Mild</strong></td>
<td>42% (43%/42%)</td>
<td>13% (9%/11%)</td>
<td>18% (13%/14%)</td>
</tr>
<tr>
<td><strong>Moderate</strong></td>
<td>49% (44%/50%)</td>
<td>56% (53%/57%)</td>
<td>46% (46%/42%)</td>
</tr>
<tr>
<td><strong>Severe</strong></td>
<td>8% (10%/5%)</td>
<td>26% (32%/29%)</td>
<td>70% (66%/73%)*</td>
</tr>
<tr>
<td><strong>Profound</strong></td>
<td>2% (4%/2%)</td>
<td>6% (6%/3%)</td>
<td></td>
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</tbody>
</table>

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: 27% (2012: 26%) had a hearing test in the last 5 years, most tests are done by hospital audiologists and family doctors.

Have you ever taken a hearing test?

- Yes, in the last 12 months: 53%
- Yes, in the last 1-5 years: 16%
- Yes, more than 5 years ago: 11%
- No, never: 21%

Where/how was your hearing tested?

- Hospital Audiologist: 30%
- Family doctor: 30%
- Ear doctor (ENT): 18%
- Hearing Aid Dispenser/Audiologist: 9%
- Online test: 2%
- Test on a smartphone App: 1%
- Other: 15%
- Don't know: 6%

Base=10'841

Base= 2'871
Hearing Tests: both hearing screening at the GP and yearly testing for people over 55 is accepted by a majority of the population in the UK

Do you think everyone over the age of 55 should have their hearing tested every year?

- Yes: 61%
- No: 39%

Do you think your family doctor should screen (carry out a short test) your hearing when you visit them for medical checkups?

- Yes: 73%
- No: 27%

Base=4’014
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.
Of those who discussed the hearing loss with a doctor, 73% talked to a family doctor (GP) first and 27% talked to an ENT first.

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

- **Total (n=866)**:
  - 27% Ear doctor (ENT specialist)
  - 73% Your family doctor

- **Hearing aid (n=533)**:
  - 25% Ear doctor (ENT specialist)
  - 75% Your family doctor

- **Hearing loss but no hearing aid (n=333)**:
  - 31% Ear doctor (ENT specialist)
  - 69% Your family doctor
The route to the hearing aid: Compared to 2012 drop out 3 was reduced slightly

Base: n=1'325

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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).
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>Total hearing impaired</th>
<th>HA owner</th>
<th>Hearing impaired non-owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>0% 20% 40% 60% 80% 100%</td>
<td>0% 20% 40% 60% 80% 100%</td>
<td>0% 20% 40% 60% 80% 100%</td>
</tr>
<tr>
<td>54% 66%</td>
<td>79% 89%</td>
<td>36% 49%</td>
</tr>
<tr>
<td>62%</td>
<td>90%</td>
<td>44%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (Base: 479)**

- Referred to a hearing aid dispenser / audiologist: 63%
- Referred to an ear doctor (ENT): 39%
- Recommended to get a hearing aid: 16%
- Recommended no further action: 1%

**Impaired non-owner (Base: 265)**

- Referred to a hearing aid dispenser / audiologist: 18%
- Referred to an ear doctor (ENT): 42%
- Recommended to get a hearing aid: 11%
- Recommended no further action: 32%

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Main reasons for GP not recommending further action are that they don’t think one benefits from HAs and they think one should wait until hearing gets worse

**IF GP DIDN'T RECOMMEND FURTHER ACTION**: What was the reason provided by your family doctor, why he didn't refer you for further action?

- Family doctor did not think I would benefit from hearing aids: 39%
- Family doctor thought I should wait until it got worse: 36%
- I did not want to pursue after talking to my family doctor: 9%
- Other: 25%

Base: n=95
The route to the hearing aid: ENT
Have you discussed your hearing problem with an ear doctor (ENT)?

% Discussed with ENT

<table>
<thead>
<tr>
<th>Total hearing impaired</th>
<th>HA owner</th>
<th>Hearing impaired non-owners</th>
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</table>

What did he/she recommend?

**HA owner (Base: 383)**
- Did prescribe a hearing aid: 63%
- Referred to a hearing aid dispenser / audiologist: 43%
- Recommended no further action: 1%

**Impaired non-owner (Base: 226)**
- Did prescribe a hearing aid: 11%
- Referred to a hearing aid dispenser / audiologist: 35%
- Recommended no further action: 56%
The route to the hearing aid: HA dispenser

Have you discussed your hearing problem with a Hearing Aid Dispenser/Audiologist?

- Total hearing impaired:
  - EuroTrak 2015: 47%
  - EuroTrak 2012: 46%
  - EuroTrak 2009: 45%

- HA owner:
  - EuroTrak 2015: 84%
  - EuroTrak 2012: 86%
  - EuroTrak 2009: 88%

- Hearing impaired non-owners:
  - EuroTrak 2015: 20%
  - EuroTrak 2012: 19%
  - EuroTrak 2009: 18%

What did he/she recommend?

- HA owner (Base: 508)
  - Recommended to get a hearing aid: 98%
  - Recommended not to get a hearing aid: 2%

- Impaired non-owner (Base: 136)
  - Recommended to get a hearing aid: 37%
  - Recommended not to get a hearing aid: 63%
Recommendations by profession

- Referred to an ear doctor (ENT)
- Referred to a hearing aid dispenser / audiologist
- Recommended to get a hearing aid
- Recommended no further action

**GP (N=744)**
- Referred to an ear doctor: 45%
- Referred to a hearing aid dispenser: 40%
- Recommended to get a hearing aid: 14%
- Recommended no further action: 13%

**ENT (N=609)**
- Referred to an ear doctor: 42%
- Referred to a hearing aid dispenser: 40%
- Recommended to get a hearing aid: 23%
- Recommended no further action: 17%

**Akustiker (N=644)**
- Referred to an ear doctor: 83%
Personal Sound Amplification Products: 18% were made aware of PSAPs by the GP or ENT during a consultation.

During your consultation with your family doctor or an ear doctor, were you made aware of any Assisted Listening Devices (a device that amplifies sound. Device NOT fit by a hearing care professional)?

- Yes 18%
- No 82%

Base=782
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality
Work competitiveness: 81% 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?

- Of no use: 19%
- Of some use: 48%
- Of significant use: 33%

Base: N=165
**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 =480/ hearing aid n=364
**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

Getting more forgetful in the last year?

<table>
<thead>
<tr>
<th></th>
<th>Hearing aid</th>
<th>Top 50% hearing loss, no hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, much more</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Yes, somewhat more</td>
<td>46%</td>
<td>70%</td>
</tr>
<tr>
<td>No</td>
<td>50%</td>
<td>25%</td>
</tr>
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</table>

Base: hearing aid n=402 / no hearing aid =118

*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)
- 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.

Base: Top 50% n=115 / hearing aid n=395

*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?

- Top 50% hearing loss, no hearing aid (n=118)
  - No: 66%
  - Yes: 34%

- Hearing aid (n=402)
  - No: 41%
  - Yes: 59%
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>2015</td>
</tr>
<tr>
<td></td>
<td>1%</td>
<td>70%</td>
</tr>
<tr>
<td></td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Severe</td>
<td>(15%)</td>
<td>4%</td>
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<tr>
<td></td>
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</tr>
<tr>
<td>Moderate</td>
<td>(52%)</td>
<td>28%</td>
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<td></td>
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</tr>
<tr>
<td>Mild</td>
<td>(30%)</td>
<td>24%</td>
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</table>

Base: n=1’302
Sums can differ from 100% due to rounding
* combined “severe” and “profound” because n is too small

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79% of the currently owned HAs were fitted in 2012 or later

Year of purchase

Age of currently owned HAs (Mean):
2015: 2.1 years
2012: 2.1 years
2009: 2.6 years

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1 out of 5 binaurally fitted HA owners didn’t get the 2 HAs at the same time. Only 5% use more than 1 pair of HAs.

If 2 HAs: Did you get them both at the same time or separately?

- At the same time: 82%
- Separately: 18%

HA-owner, n=386

How many years apart did you get your hearing aids?

- 1 year: 33%
- 2 years: 24%
- 3 years: 18%
- 4-5 years: 19%
- more than 5 years: 6%

Base: n=56 (low sample)

If 2 HAs: How many pairs of hearing aids do you use?

- More than 1 pair: 95%
- Just 1 pair: 5%

HA-owner, n=386

Do you also own a pair of hearing aids from the NHS?

- Yes: 37%
- No: 63%

Base (=more than 1 pair, purchased in private sector: n=7 (very low sample!!)
On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 5 years before they are being replaced.

Current HAs = first HAs?

- Yes: 54%
- No: 45%

HA-owner, n=605

How many years did you own your previous HAs?

- 1-3 years: 37%
- 4-6 years: 35%
- 7-10 years: 16%
- 11 years or longer: 12%

Base: n=220

Age of HA before it has been replaced:
- 2015: 4 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: 18%
- 2 years: 25%
- 3 years: 26%
- 4-6 years: 14%
- more than 6 years: 18%

Base: n=302
Monaural-binaural treatment by purchase date

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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 - 83% of the hearing aid owners received a free-of-charge NHS instrument.

**Owners:** Did you purchase your most current hearing aid in the private sector or did you receive a free-of-charge NHS instrument?

- 83% received NHS instrument
- 17% purchased from private sector
- 0% don't know

**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, NHS)

- 55% yes
- 21% no
- 24% don't know
- 0% don't know
On average, HAs are worn 8.1 hours a day.

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

<table>
<thead>
<tr>
<th>Hours</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>11%</td>
<td>19%</td>
<td>41%</td>
</tr>
<tr>
<td>1</td>
<td>8%</td>
<td>4%</td>
<td>23%</td>
</tr>
<tr>
<td>2</td>
<td>33%</td>
<td>5%</td>
<td>29%</td>
</tr>
<tr>
<td>3</td>
<td>29%</td>
<td>6%</td>
<td>33%</td>
</tr>
<tr>
<td>4</td>
<td>44%</td>
<td>53%</td>
<td>44%</td>
</tr>
<tr>
<td>5</td>
<td>45%</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>6</td>
<td>53%</td>
<td>60%</td>
<td>61%</td>
</tr>
<tr>
<td>7</td>
<td>60%</td>
<td>75%</td>
<td>76%</td>
</tr>
<tr>
<td>8</td>
<td>75%</td>
<td>82%</td>
<td>90%</td>
</tr>
<tr>
<td>9</td>
<td>82%</td>
<td>97%</td>
<td>98%</td>
</tr>
<tr>
<td>10</td>
<td>97%</td>
<td>98%</td>
<td>100%</td>
</tr>
</tbody>
</table>

If binaurally fitted: Approximately how many hours a day is the left aid worn and how many hours is the right aid worn?
- 97%: usually wear them together (N=386)
- if not worn together (3%, N=14!): Left HA: 5.0 hours/day, right HA: 3.7 hours/day

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Only 25% of today’s hearing aid owners are aware of their hearing aid brand

**Are you aware of the brand of your hearing aid(s)?**
- 31% Yes, I know it by heart
- 25% No, but I could find out
- 44% No, and can't find out

**In case you plan to obtain new hearing aid(s), what brand would you choose?**
- 33% Preferably from the same brand you currently own
- 57% Preferably from a different brand than you currently own
- 9% Indifferent, could be any brand

Base: N=605 / 428

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79% of the currently owned HAs either had no repair need or only once, 59% have never had a service.

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

- 2015: 58% never, 21% once, 12% 2-3 times, 6% 4-5 times, 3% more often
- 2012: 61% never, 24% once, 11% 2-3 times, 2% 4-5 times, 2% more often
- 2009: 57% never, 20% once, 16% 2-3 times, 5% 4-5 times, 2% more often

Have you ever had your hearing aid serviced?

- 2015: 41% Yes, 59% No

HA-owner:
2015: n=605
2012: n=501
2009: n=513
Awareness and usage of accessories and Telecoil
TV Box is the most often owned electronic accessory: 6% of hearing aid owners have one – 24% have heard of it but don’t own one.

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

- TV Box connected to the tv set to stream audio to your hearing aid: 70% heard of it, 24% own one, 6% never heard of it.
- Additional microphone for conversations with one person, conversations in a group etc.: 75% heard of it, 21% own one, 4% never heard of it.
- Audio streamer to connect my hearing aids to other devices like cell phones, mp3 players, tv sets, etc: 73% heard of it, 23% own one, 4% never heard of it.
- Phone clip, plugged into the mobile phone to stream calls to the hearing aid: 76% heard of it, 21% own one, 3% never heard of it.
- Combined device - audio streamer and remote control in one device: 80% heard of it, 17% own one, 3% never heard of it.

Base: N=605
64% of hearing aid owners know what Telecoil is and 18% have used it – mainly in theatre or house of worship. Those who use it are satisfied.

**Have you seen this logo before?**
- 64% Yes, and I know what it stands for
- 23% Yes, but I don't know what it stands for
- 12% No, have never seen this
- 1% Other

**On what type of venues have you used hearing aids in a hearing loop (Telecoil)?**
- Theater, auditorium: 55%
- House of worship: 31%
- School, university: 15%
- Drive thru, ticket window, bank counter: 13%
- Conference room: 13%
- Airport, train station: 12%
- Court room: 6%
- Home: 3%

**Are your hearing aids equipped with Telecoil?**
- 18% Yes, and I have already used Telecoil
- 29% Yes, but have never used it
- 23% No
- 10% I don't know

**How satisfied are you with the use of Telecoil overall?**
- 31% very satisfied
- 30% satisfied
- 15% somewhat satisfied
- 10% neutral
- 15% somewhat dissatisfied
- 15% dissatisfied
- 10% very dissatisfied

HA-owner, n=605

HA-owner, who have used Telecoil, n=118
Satisfaction with hearing aids and drivers
81% 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?

- 27% hearing aids work better than I expected
- 54% hearing aids work as I expected
- 19% hearing aids work worse than I expected

Base: N=605
Overall satisfaction with HA is 70% in the UK

<table>
<thead>
<tr>
<th>% Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
</tr>
<tr>
<td>70%</td>
</tr>
<tr>
<td>77%</td>
</tr>
<tr>
<td>72%</td>
</tr>
<tr>
<td>60%</td>
</tr>
<tr>
<td>72%</td>
</tr>
<tr>
<td>71%</td>
</tr>
<tr>
<td>48%</td>
</tr>
<tr>
<td>73%</td>
</tr>
<tr>
<td>82%</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>70%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Satisfaction with current hearing aids

Dispenser
- Professionalism of dispenser
- Quality of dispensers counseling
- Quality of service during hearing aid fitting period
- Quality of service after purchase

Sound quality
- Clarity of tone and sound
- Comfort with loud sounds
- Natural sounding
- Richness or fidelity of sound

Product features
- Ease of changing battery
- Reliability
- Overall fit/ Comfort
- Battery life
- Visibility to others
- Value (performance versus money spent)
- Managing whistling/feedback/buzzing

Trend*:
- Professionalism of dispenser: -1%
- Quality of dispensers counseling: +2%
- Quality of service during hearing aid fitting period: -1%
- Quality of service after purchase: +1%
- Clarity of tone and sound: -5%
- Comfort with loud sounds: +1%
- Natural sounding: -3%
- Richness or fidelity of sound: -3%
- Ease of changing battery: +1%
- Reliability: -1%
- Overall fit/ Comfort: +4%
- Battery life: +1%
- Visibility to others: +4%
- Value (performance versus money spent): -1%
- Managing whistling/feedback/buzzing: +2%

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

* % of satisfied HA owners compared to EuroTrak 2012

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Satisfaction with current hearing aids

<table>
<thead>
<tr>
<th>Listening situation</th>
<th>% dissatisfied</th>
<th>% satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation with one..</td>
<td>11%</td>
<td>79%</td>
</tr>
<tr>
<td>At home with family..</td>
<td>13%</td>
<td>75%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>14%</td>
<td>73%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>14%</td>
<td>70%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>19%</td>
<td>70%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>15%</td>
<td>70%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>13%</td>
<td>69%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>15%</td>
<td>69%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>14%</td>
<td>68%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>16%</td>
<td>67%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>17%</td>
<td>64%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>24%</td>
<td>63%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>24%</td>
<td>60%</td>
</tr>
<tr>
<td>In a larger lecture hall..</td>
<td>18%</td>
<td>59%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>18%</td>
<td>57%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>30%</td>
<td>55%</td>
</tr>
<tr>
<td>In school or a classroom..</td>
<td>16%</td>
<td>51%</td>
</tr>
</tbody>
</table>

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

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

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HA-owner, n=605
Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA

**Dispenser**
- Quality of service after purchase: 0.59
- Quality of dispensers counseling: 0.59
- Professionalism of dispenser: 0.58
- Quality of service during hearing aid fitting period: 0.56

**Sound quality signal process.**
- Clearness of tone and sound: 0.80
- Natural sounding: 0.79
- Richness or fidelity of sound: 0.78
- Comfort with loud sounds: 0.71

**Product features**
- Reliability: 0.76
- Managing whistling/feedback/buzzing: 0.68
- Overall fit/Comfort: 0.68
- Value (performance versus money spent): 0.65
- Visibility to others: 0.60
- Ease of changing battery: 0.58
- Battery life: 0.46

*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: 57%
- When talking on a phone: 56%
- When watching TV with others: 48%
- In conversations with 1 person: 39%
- In conversations with small groups: 36%
- In noisy situations: 32%
- In conversations with large groups: 30%
- In the workplace: 18%
- When talking to children: 17%
- When riding in a car: 17%
- In a store, when shopping: 16%
- When listening to music: 15%
- In a larger lecture hall (e.g., theater, concert hall, place of worship, etc.): 15%
- Outdoors: 11%
- At a movie theater: 8%
- In school or a classroom (as an observer or student): 8%
- During leisure activities (e.g., exercising, taking a walk, etc.): 7%

Hearing loss Total (n=1'325)
Hearing aid (n=605)
Hearing loss but no hearing aid (n=720)
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially communication effectiveness and participating in group activities 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).

Overall ability to communicate more effectively in most...  
- 8% a lot worse  
- 36% worse  
- 37% the same  
- 17% better  
- 14% a lot better

Ability to participate in group activities  
- 8% a lot worse  
- 43% worse  
- 31% the same  
- 14% better  
- 14% a lot better

Confidence in yourself  
- 7% a lot worse  
- 52% worse  
- 25% the same  
- 14% better  
- 14% a lot better

Social life  
- 6% a lot worse  
- 54% worse  
- 26% the same  
- 13% better  
- 13% a lot better

Sense of safety  
- 5% a lot worse  
- 57% worse  
- 23% the same  
- 14% better  
- 14% a lot better

Sense of independence  
- 5% a lot worse  
- 56% worse  
- 24% the same  
- 13% better  
- 13% a lot better

Relationships at home  
- 5% a lot worse  
- 56% worse  
- 25% the same  
- 12% better  
- 12% a lot better

Feelings about yourself  
- 7% a lot worse  
- 55% worse  
- 24% the same  
- 11% better  
- 11% a lot better

Relationships at work  
- 4% a lot worse  
- 65% worse  
- 18% the same  
- 11% better  
- 11% a lot better

Mental/emotional health  
- 6% a lot worse  
- 64% worse  
- 19% the same  
- 9% better  
- 9% a lot better

Mental ability  
- 4% a lot worse  
- 69% worse  
- 14% the same  
- 11% better  
- 11% a lot better

Physical health  
- 4% a lot worse  
- 72% worse  
- 14% the same  
- 8% better  
- 8% a lot better

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HA-owner, n=605
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in most aspects.

% of HA owners feeling better/a lot better

- **Low 50% hearing loss (n=168)**
- **Top 50% hearing loss (n=389)**

- Overall ability to communicate more: 63% vs. 52%
- Confidence in yourself: 35% vs. 32%
- Sense of safety: 23% vs. 23%
- Relationships at home: 22% vs. 23%
- Sense of independence: 24% vs. 24%
- Feelings about yourself: 33% vs. 33%
- Mental/Emotional health: 19% vs. 19%
- Mental ability: 16% vs. 15%
- Physical health: 25% vs. 15%
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, 39% worse, 28% the same, 20% better
- Social activities together with Person: 7% a lot worse, 56% worse, 23% the same, 12% better
- Personal relationship with Person: 5% a lot worse, 67% worse, 17% the same, 10% better
- Quarrels/disputes with Person: 6% a lot worse, 68% worse, 14% the same, 10% better

Someone in HH / parent has HA, n=512
92% 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?

- Never: 8%
- Rarely: 14%
- Occasionally: 41%
- Regularly: 38%

Base: N=605
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=605)</th>
<th>%HA-Non-owner Low 50% HL (n=389)</th>
<th>%HA-Non-owner Top 50% HL (n=201)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ears impaired</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>22%</td>
<td>45%</td>
<td>35%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>78%</td>
<td>55%</td>
<td>65%</td>
</tr>
<tr>
<td>Perceived loss</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>13%</td>
<td>54%</td>
<td>14%</td>
</tr>
<tr>
<td>Moderate</td>
<td>56%</td>
<td>42%</td>
<td>65%</td>
</tr>
<tr>
<td>Severe</td>
<td>26%</td>
<td>3%</td>
<td>17%</td>
</tr>
<tr>
<td>Profound</td>
<td>6%</td>
<td>1%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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

1. Hearing loss not severe enough
   - Reason: 34%
   - Somewhat a reason: 34%
   - Not a reason: 32%

2. Would be embarrassed to wear a hearing aid
   - Reason: 39%
   - Somewhat a reason: 18%
   - Not a reason: 43%

3. Do not admit I have a hearing loss in public
   - Reason: 43%
   - Somewhat a reason: 13%
   - Not a reason: 44%

4. They do not work well in noisy situations
   - Reason: 34%
   - Somewhat a reason: 20%
   - Not a reason: 45%

5. Have more serious priorities
   - Reason: 33%
   - Somewhat a reason: 21%
   - Not a reason: 46%

6. They do not restore your hearing to normal
   - Reason: 30%
   - Somewhat a reason: 24%
   - Not a reason: 47%

7. Hear well enough in most situations
   - Reason: 37%
   - Somewhat a reason: 15%
   - Not a reason: 47%

8. Have not had hearing tested yet
   - Reason: 40%
   - Somewhat a reason: 10%
   - Not a reason: 50%

9. Have tinnitus (ringing in ears)
   - Reason: 34%
   - Somewhat a reason: 8%
   - Not a reason: 58%

Base: non owners Top 50% HL: n=201
### 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>Have sensor-neural hearing loss (nerve deafness)</td>
<td>9%</td>
<td>13%</td>
<td>60%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>18%</td>
<td>17%</td>
<td>68%</td>
</tr>
<tr>
<td>Family doctors opinion (GP)</td>
<td>18%</td>
<td>17%</td>
<td>68%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>21%</td>
<td>16%</td>
<td>64%</td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>24%</td>
<td>11%</td>
<td>65%</td>
</tr>
<tr>
<td>Social/Family opinion such as child, spouse, friend</td>
<td>11%</td>
<td>22%</td>
<td>67%</td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>24%</td>
<td>18%</td>
<td>65%</td>
</tr>
<tr>
<td>Do not trust Hearing Aid Dispenser/Audiologist</td>
<td>18%</td>
<td>13%</td>
<td>68%</td>
</tr>
<tr>
<td>Another hearing aid owners opinion</td>
<td>18%</td>
<td>17%</td>
<td>70%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>13%</td>
<td>17%</td>
<td>70%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>15%</td>
<td>4%</td>
<td>74%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>13%</td>
<td>13%</td>
<td>73%</td>
</tr>
<tr>
<td>Do not trust Hearing Aid Dispenser/Audiologist</td>
<td>14%</td>
<td>12%</td>
<td>74%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>16%</td>
<td>4%</td>
<td>80%</td>
</tr>
<tr>
<td>Another hearing aid owners opinion</td>
<td>16%</td>
<td>4%</td>
<td>80%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>15%</td>
<td>4%</td>
<td>81%</td>
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<td>18%</td>
<td>13%</td>
<td>81%</td>
</tr>
<tr>
<td>Do not trust Hearing Aid Dispenser/Audiologist</td>
<td>11%</td>
<td>8%</td>
<td>81%</td>
</tr>
<tr>
<td>Ear doctors opinion (ENT)</td>
<td>13%</td>
<td>13%</td>
<td>85%</td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>13%</td>
<td>2%</td>
<td>85%</td>
</tr>
<tr>
<td>Social/Family opinion such as child, spouse, friend</td>
<td>8%</td>
<td>7%</td>
<td>85%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>8%</td>
<td>7%</td>
<td>85%</td>
</tr>
<tr>
<td>Family doctors opinion (GP)</td>
<td>13%</td>
<td>2%</td>
<td>85%</td>
</tr>
<tr>
<td>Social/Family opinion such as child, spouse, friend</td>
<td>9%</td>
<td>5%</td>
<td>85%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>9%</td>
<td>5%</td>
<td>85%</td>
</tr>
</tbody>
</table>

**Base:** non owners Top 50% HL: n=201
Top 10 reasons for HA owners NOT using them

- They do not work well in noisy situations
  - Reason: 57%
  - Somewhat a reason: 22%
  - Not a reason: 21%

- They do not restore your hearing to normal
  - Reason: 46%
  - Somewhat a reason: 29%
  - Not a reason: 26%

- Uncomfortable
  - Reason: 57%
  - Somewhat a reason: 14%
  - Not a reason: 28%

- Hear well enough in most situations
  - Reason: 50%
  - Somewhat a reason: 19%
  - Not a reason: 30%

- Have tried hearing aid and they do not work
  - Reason: 39%
  - Somewhat a reason: 23%
  - Not a reason: 38%

- Hearing loss not severe enough
  - Reason: 41%
  - Somewhat a reason: 16%
  - Not a reason: 43%

- Have tinnitus (ringing in ears)
  - Reason: 30%
  - Somewhat a reason: 16%
  - Not a reason: 54%

- Bad design
  - Reason: 26%
  - Somewhat a reason: 20%
  - Not a reason: 55%

- Have hearing loss only with high pitch sounds
  - Reason: 23%
  - Somewhat a reason: 21%
  - Not a reason: 56%

- Have more serious priorities
  - Reason: 23%
  - Somewhat a reason: 15%
  - Not a reason: 62%

Owners who don't use, n=68
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: 59%
- uncomfortable in general: 18%
- others say it is uncomfortable: 6%
- taking it on and off, adjusting: 4%
- it is itching: 3%
- afraid of losing it: 2%
- uncomfortable with glasses: 2%
- cerumen, dirt, infection: 2%
- not suited for certain activities (sports, swimming...): 1%
- uncomfortable noises, feedback, etc.: 1%
- other: 6%

Base: n=315
Social rejection because of hearing loss compared to the acceptance of hearing aids
80% 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: 5%
- Rarely: 16%
- Occasionally: 12%
- Regularly: 68%

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

- Never: 3%
- Rarely: 21%
- Occasionally: 41%
- Regularly: 35%

Base: N=605
Base: Top 50% hearing loss, no hearing aid N=201
Buying intentions and most important triggers to buy
13% (2012:12%) of non-owners intend to get a hearing aid within the next year. Re-buying intention is higher than first-buying intention.

**Buying intention hearing impaired in %**

- **Owner**
  - Within the next 6 months: 9%
  - In about a year: 10%
  - In about 2 years: 7%
  - In about 3 years: 5%
  - In about 5 years: 2%
  - In about 6 years: 17%
  - In about 7 years: 47%

- **Non-owner**
  - Within the next 6 months: 6%
  - In about a year: 7%
  - In about 2 years: 5%
  - In about 3 years: 3%
  - In about 5 years: 30%
  - In about 6 years: 28%
  - In about 7 years: 45%

Don't know: 0%

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The most important influencing factors are worsening hearing loss, GP, Audiologist (NHS) and spouse (and: price and ENT for non 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)?

- **Owner (n=605):**
  - Hearing loss got worse: 63%
  - Price of hearing aid: 42%
  - GP / Family doctor: 40%
  - Audiologist (NHS): 38%
  - ENT / Ear Doctor: 18%
  - Spouse: 18%
  - Hearing aid dispenser / Audiologist: 17%
  - Another hearing aid owner (word of mouth): 17%
  - Free due to coverage by Insurance / Received hearing aid...: 16%
  - Safety concerns: 15%
  - Financial Situation improved: 13%
  - Co-worker or boss: 10%
  - Internet: Other websites, google...: 9%
  - Internet: Websites of hearing aids manufacturers: 9%
  - Hearing loss article or literature: 8%
  - TV advertisement: 8%
  - Co-worker or boss: 6%
  - Internet: Websites of hearing aid clinics: 5%
  - Newspaper advertisement: 4%
  - Magazine advertisement: 4%
  - Direct mail piece: 4%
  - Radio advertisement: 3%
  - Telemarketing phone call: 3%
- **Non-owner (n=720):**
  - Hearing loss got worse: 57%
  - ENT / Ear Doctor: 44%
  - Audiologist (NHS): 43%
  - GP / Family doctor: 42%
  - ENT / Ear Doctor: 18%
  - Spouse: 24%
  - Hearing aid dispenser / Audiologist: 18%
  - Free due to coverage by Insurance / Received hearing aid...: 17%
  - Safety concerns: 16%
  - Financial Situation improved: 16%
  - Other: 15%
  - Co-worker or boss: 13%
  - Internet: Other websites, google...: 13%
  - Internet: Websites of hearing aids manufacturers: 12%
  - Hearing loss article or literature: 11%
  - TV advertisement: 10%
  - Co-worker or boss: 9%
  - Internet: Websites of hearing aid clinics: 9%
  - Newspaper advertisement: 8%
  - Magazine advertisement: 8%
  - Direct mail piece: 8%
  - Radio advertisement: 7%
  - Telemarketing phone call: 7%
The most important trigger to get hearing aids are the audiologist (NHS) and the worsening hearing loss.

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

- **Audiologist (NHS)**: 30%
- **Hearing loss got worse**: 22%
- **GP /Family doctor**: 13%
- **Hearing aid dispenser / Audiologist**: 7%
- **ENT/ Ear Doctor**: 7%
- **Spouse**: 5%
- **Price of hearing aid**: 4%
- **Free due to coverage by Insurance / Received hearing aid free of charge**: 3%
- **Friend / relative**: 2%
- **Direct mail piece**: 1%
- **Another hearing aid owner (word of mouth)**: 1%
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>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Real value is within interval:</td>
</tr>
<tr>
<td></td>
<td>Level of proportion: 50%/50%</td>
</tr>
<tr>
<td>50</td>
<td>+/- 13.9</td>
</tr>
<tr>
<td>100</td>
<td>+/- 9.8</td>
</tr>
<tr>
<td>250</td>
<td>+/- 6.2</td>
</tr>
<tr>
<td>500</td>
<td>+/- 4.4</td>
</tr>
<tr>
<td>1000</td>
<td>+/- 3.1</td>
</tr>
<tr>
<td>5’000</td>
<td>+/- 1.4</td>
</tr>
<tr>
<td>10’000</td>
<td>+/- 1.0</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>7195</td>
<td>10.5%</td>
<td>37.8%</td>
<td>49.3%</td>
<td>58.2%</td>
<td>48.0%</td>
</tr>
<tr>
<td>Female</td>
<td>7278</td>
<td>8.9%</td>
<td>47.8%</td>
<td>50.7%</td>
<td>41.8%</td>
<td>52.0%</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>2507</td>
<td>2.1%</td>
<td>35.5%</td>
<td>18.8%</td>
<td>4.1%</td>
<td>3.1%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1830</td>
<td>3.7%</td>
<td>23.6%</td>
<td>13.5%</td>
<td>6.3%</td>
<td>2.6%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1962</td>
<td>3.6%</td>
<td>41.9%</td>
<td>14.5%</td>
<td>5.1%</td>
<td>5.0%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1860</td>
<td>4.7%</td>
<td>20.1%</td>
<td>13.6%</td>
<td>8.7%</td>
<td>3.0%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>2114</td>
<td>7.8%</td>
<td>35.1%</td>
<td>14.9%</td>
<td>13.2%</td>
<td>9.7%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1663</td>
<td>12.9%</td>
<td>32.7%</td>
<td>11.1%</td>
<td>17.8%</td>
<td>11.8%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1379</td>
<td>20.4%</td>
<td>44.2%</td>
<td>8.4%</td>
<td>19.4%</td>
<td>20.8%</td>
</tr>
<tr>
<td>74+</td>
<td>1157</td>
<td>40.4%</td>
<td>56.1%</td>
<td>5.3%</td>
<td>25.3%</td>
<td>44.0%</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>1467</td>
<td>19.3%</td>
<td>49.9%</td>
<td>9.1%</td>
<td>17.5%</td>
<td>23.7%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>3823</td>
<td>14.2%</td>
<td>45.0%</td>
<td>25.1%</td>
<td>36.7%</td>
<td>40.9%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>6624</td>
<td>5.2%</td>
<td>31.9%</td>
<td>46.0%</td>
<td>29.1%</td>
<td>18.5%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>987</td>
<td>6.3%</td>
<td>40.5%</td>
<td>7.1%</td>
<td>4.5%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>110</td>
<td>41.6%</td>
<td>50.0%</td>
<td>0.5%</td>
<td>2.8%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Other</td>
<td>1462</td>
<td>8.8%</td>
<td>41.4%</td>
<td>10.2%</td>
<td>9.3%</td>
<td>8.9%</td>
</tr>
</tbody>
</table>

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

Profiles: Categories add to 100%*

<table>
<thead>
<tr>
<th>Status</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>The head of the household (alone or together with someone)</td>
<td>6954</td>
<td>14.3%</td>
<td>42.6%</td>
<td>45.9%</td>
<td>72.4%</td>
<td>73.5%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>2452</td>
<td>8.6%</td>
<td>43.2%</td>
<td>17.2%</td>
<td>15.3%</td>
<td>15.9%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>4069</td>
<td>2.1%</td>
<td>32.9%</td>
<td>30.6%</td>
<td>7.5%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Other Person</td>
<td>881</td>
<td>8.0%</td>
<td>45.7%</td>
<td>6.2%</td>
<td>4.9%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Employment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full time employed</td>
<td>5034</td>
<td>6.5%</td>
<td>28.8%</td>
<td>44.9%</td>
<td>30.0%</td>
<td>16.3%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>1567</td>
<td>6.6%</td>
<td>30.3%</td>
<td>13.9%</td>
<td>9.4%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>1334</td>
<td>8.7%</td>
<td>34.2%</td>
<td>11.6%</td>
<td>9.9%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>348</td>
<td>22.1%</td>
<td>48.2%</td>
<td>2.6%</td>
<td>5.1%</td>
<td>6.4%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>494</td>
<td>21.1%</td>
<td>46.8%</td>
<td>3.7%</td>
<td>7.2%</td>
<td>8.5%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>2112</td>
<td>28.6%</td>
<td>53.0%</td>
<td>14.4%</td>
<td>36.6%</td>
<td>55.6%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>960</td>
<td>2.0%</td>
<td>25.7%</td>
<td>9.0%</td>
<td>1.9%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondary/Grammar School</td>
<td>2428</td>
<td>17.1%</td>
<td>47.0%</td>
<td>19.2%</td>
<td>28.5%</td>
<td>33.9%</td>
</tr>
<tr>
<td>&quot;O&quot; Levels</td>
<td>1782</td>
<td>11.9%</td>
<td>39.3%</td>
<td>15.0%</td>
<td>16.6%</td>
<td>14.5%</td>
</tr>
<tr>
<td>&quot;A&quot; Levels</td>
<td>1750</td>
<td>7.0%</td>
<td>34.0%</td>
<td>15.5%</td>
<td>10.5%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Ordinary National Certificate</td>
<td>520</td>
<td>14.1%</td>
<td>46.7%</td>
<td>4.3%</td>
<td>5.1%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Higher National Certificate</td>
<td>685</td>
<td>9.0%</td>
<td>41.4%</td>
<td>5.9%</td>
<td>4.7%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Technical High School</td>
<td>548</td>
<td>12.7%</td>
<td>39.8%</td>
<td>4.6%</td>
<td>5.4%</td>
<td>4.8%</td>
</tr>
<tr>
<td>University</td>
<td>3253</td>
<td>7.4%</td>
<td>41.4%</td>
<td>28.7%</td>
<td>18.2%</td>
<td>17.3%</td>
</tr>
<tr>
<td>Other</td>
<td>881</td>
<td>17.6%</td>
<td>44.2%</td>
<td>6.9%</td>
<td>11.2%</td>
<td>11.9%</td>
</tr>
</tbody>
</table>

* Small sample sizes in some categories