

## 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

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- 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.

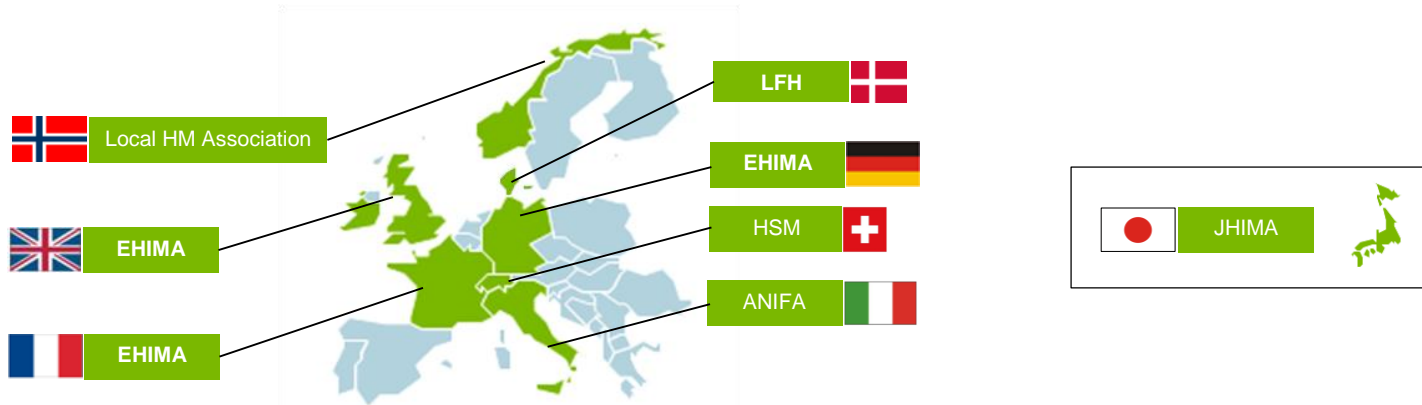
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- 81% of the hearing aid owners say their hearing aid works better than or as expected
- 70% (2012:72%) of the HA owners are satisfied with their HAs.
- The more hours worn per day, the higher the satisfaction.
- Hearing aids adoption is increasing 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.

# 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): n=1'325 people
    - 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:



# Summary

## 2. Market overview

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- 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

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- 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

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- 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

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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

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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

## 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 panelist pools of more than 40'000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=14'473** 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=720** hearing aid owners and **n=605** hearing impaired non-owners

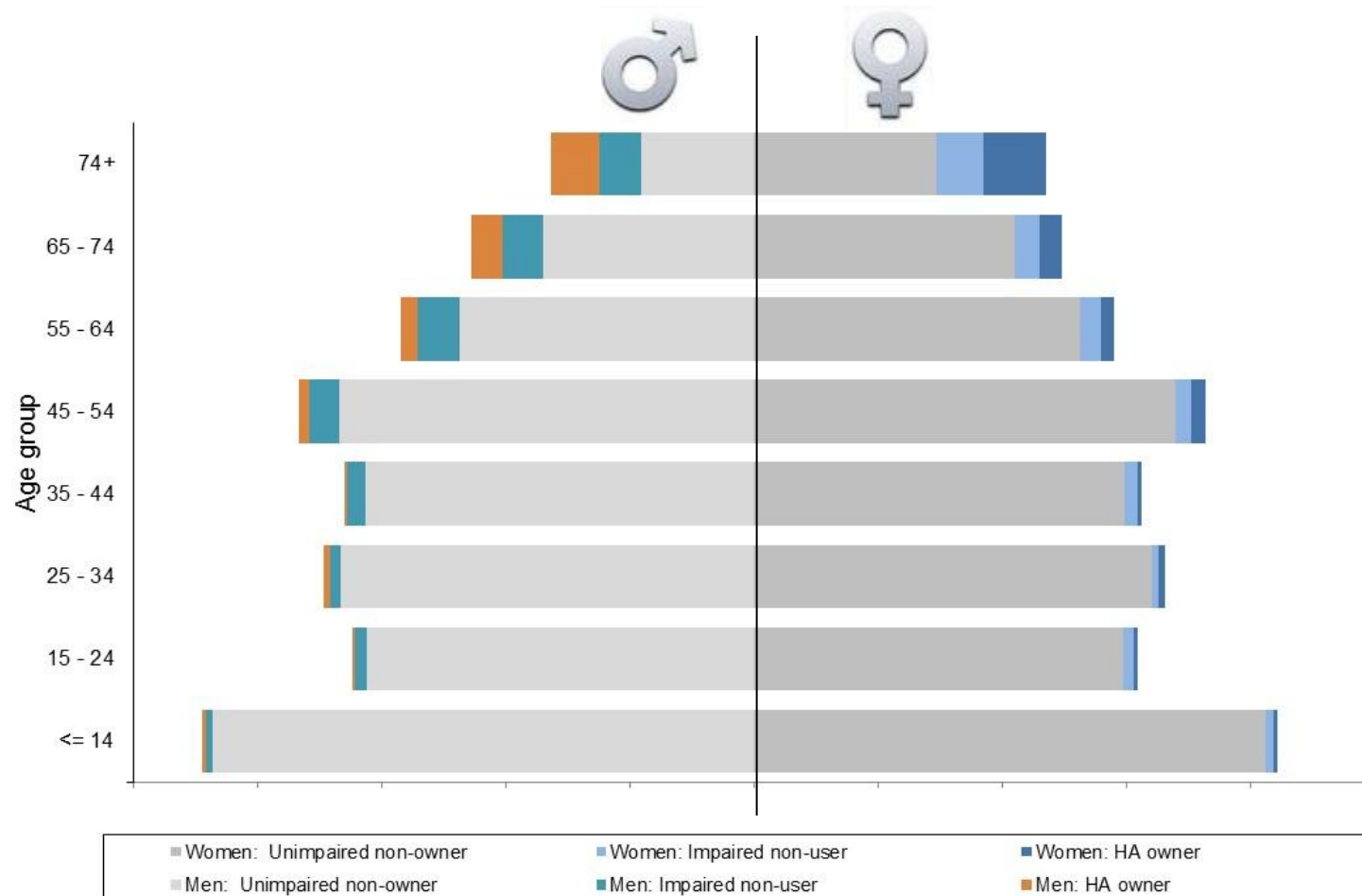
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## 2. Market overview

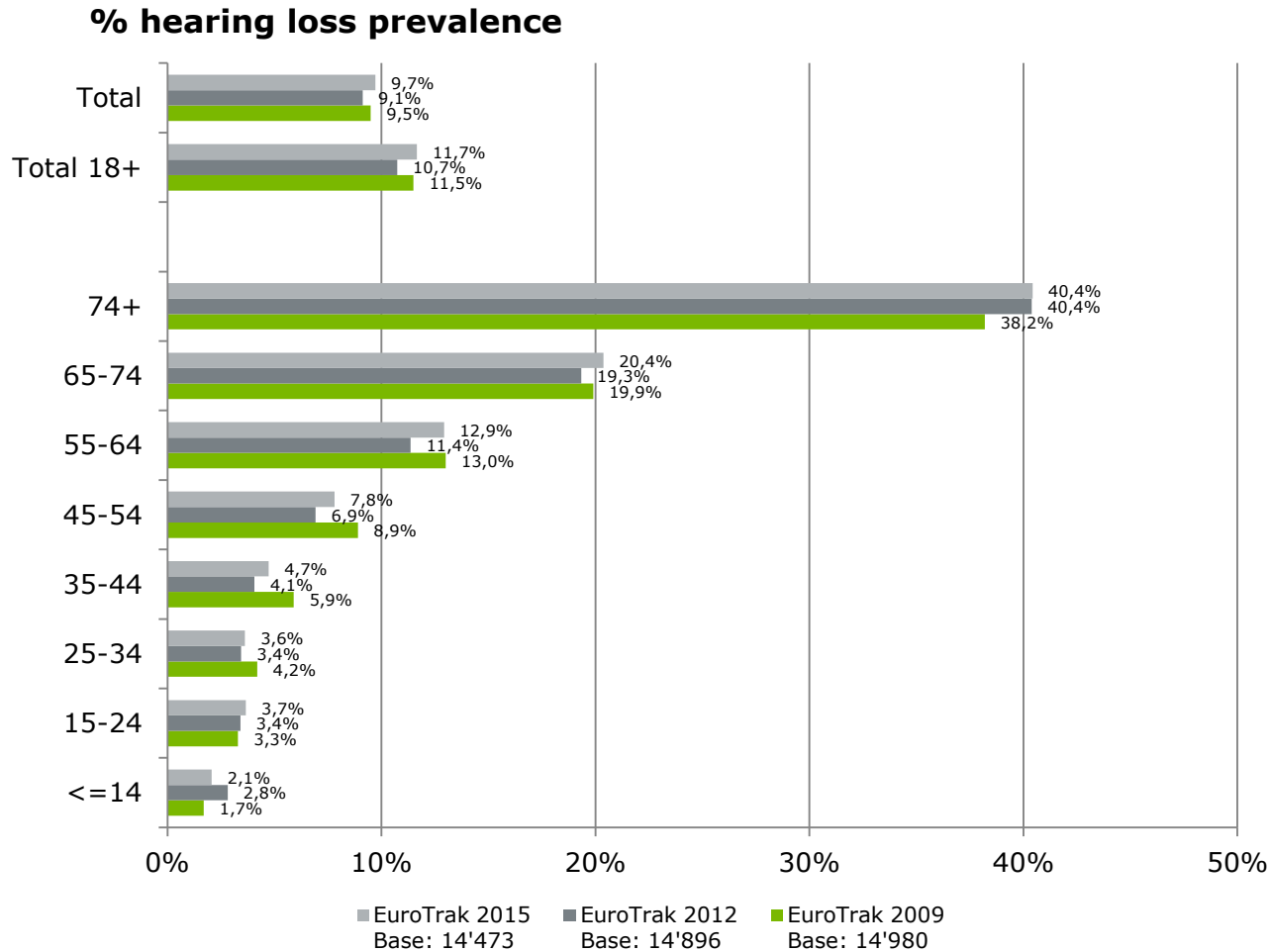
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# Prevalence of hearing loss and adoption rate

# Hearing loss and hearing instrument ownership by gender/age

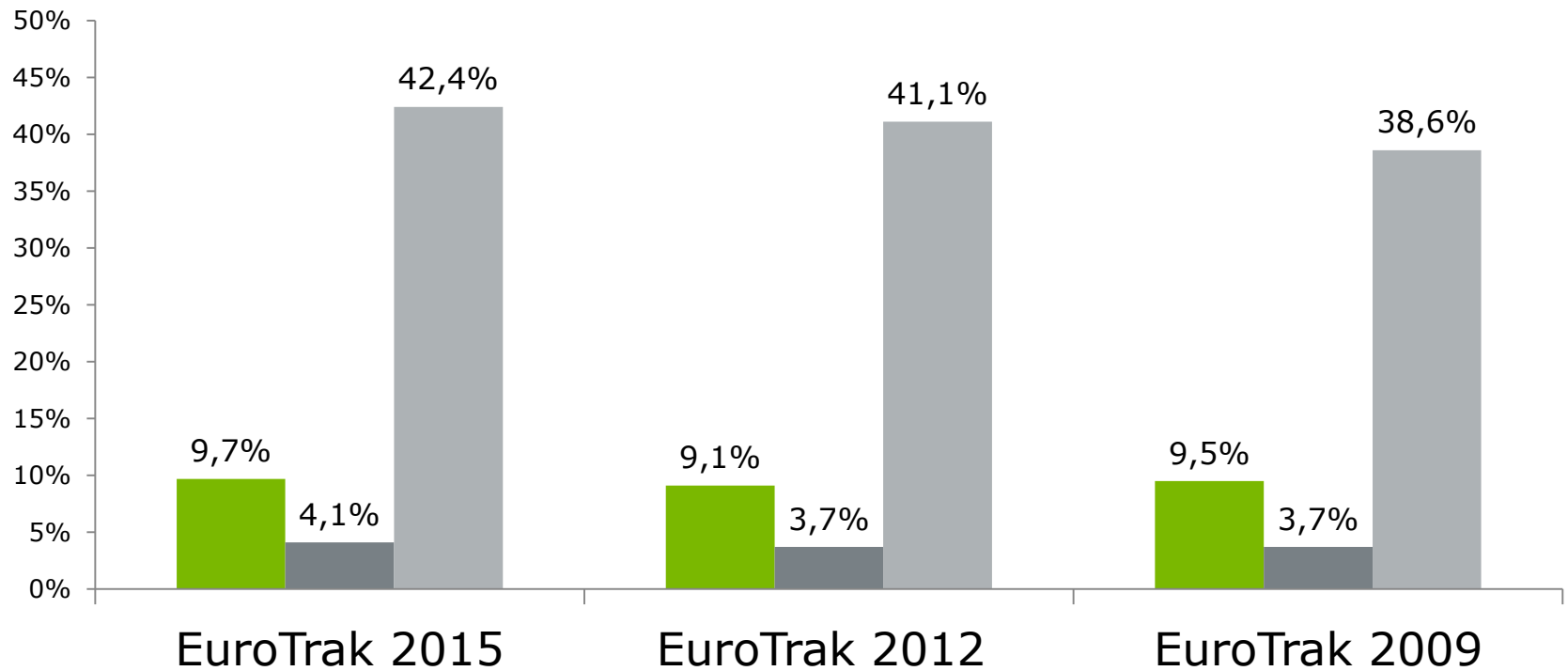


# Hearing loss prevalence UK



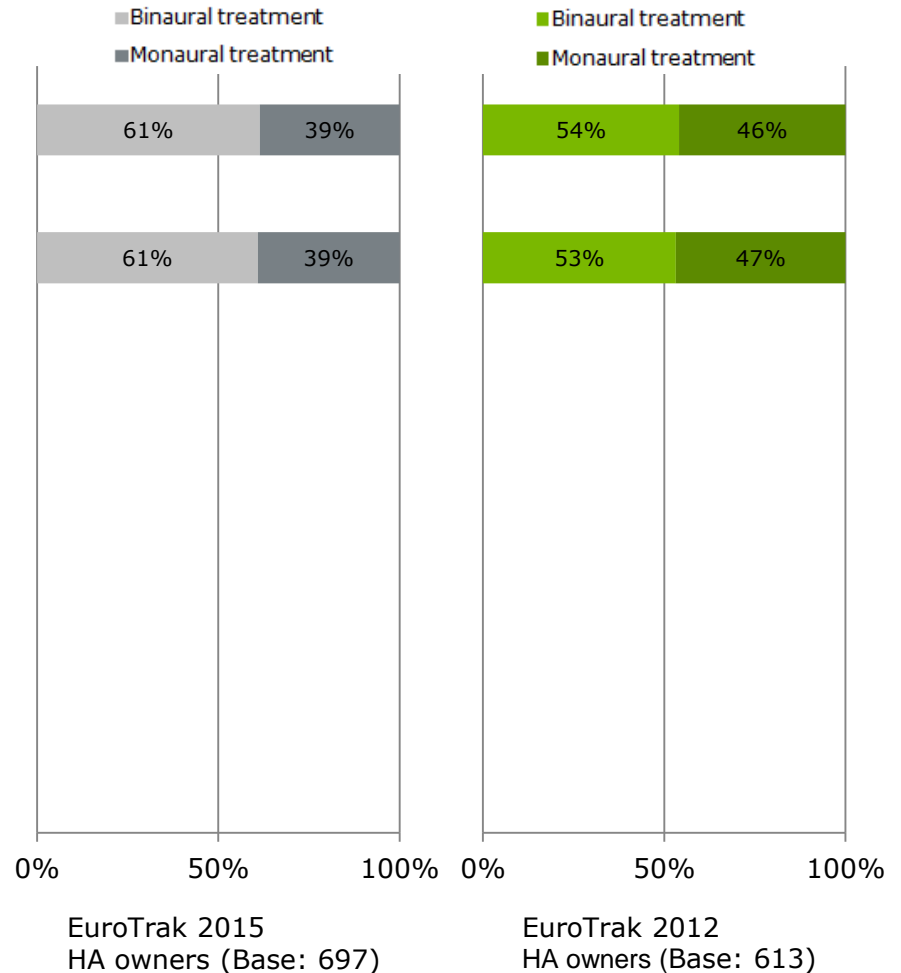
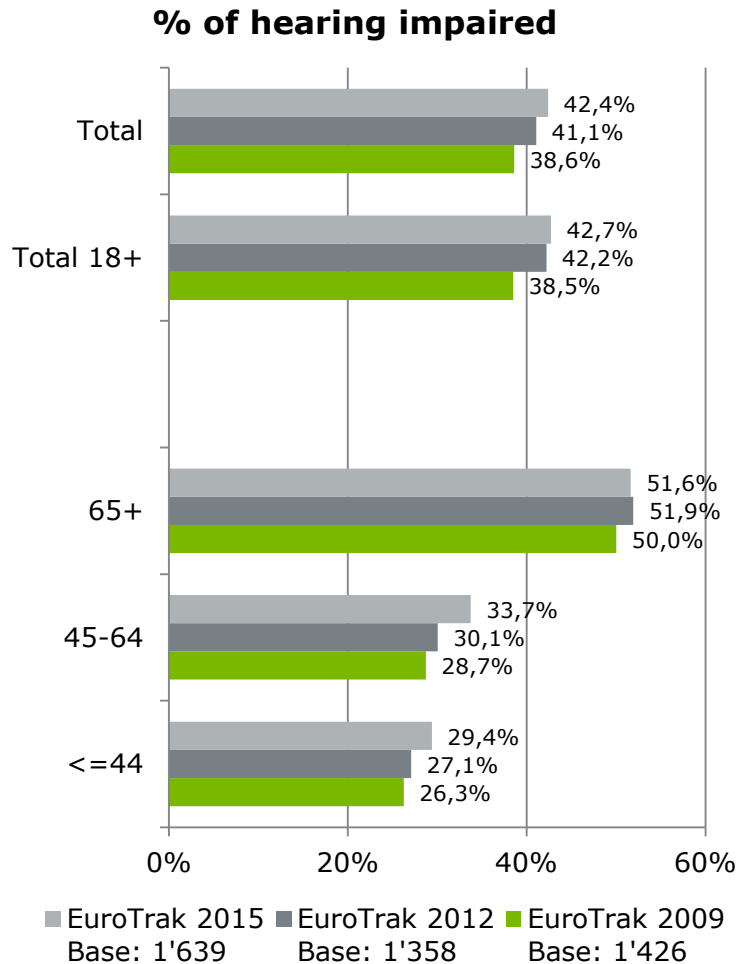


# Overview hearing loss prevalence and hearing aid adoption

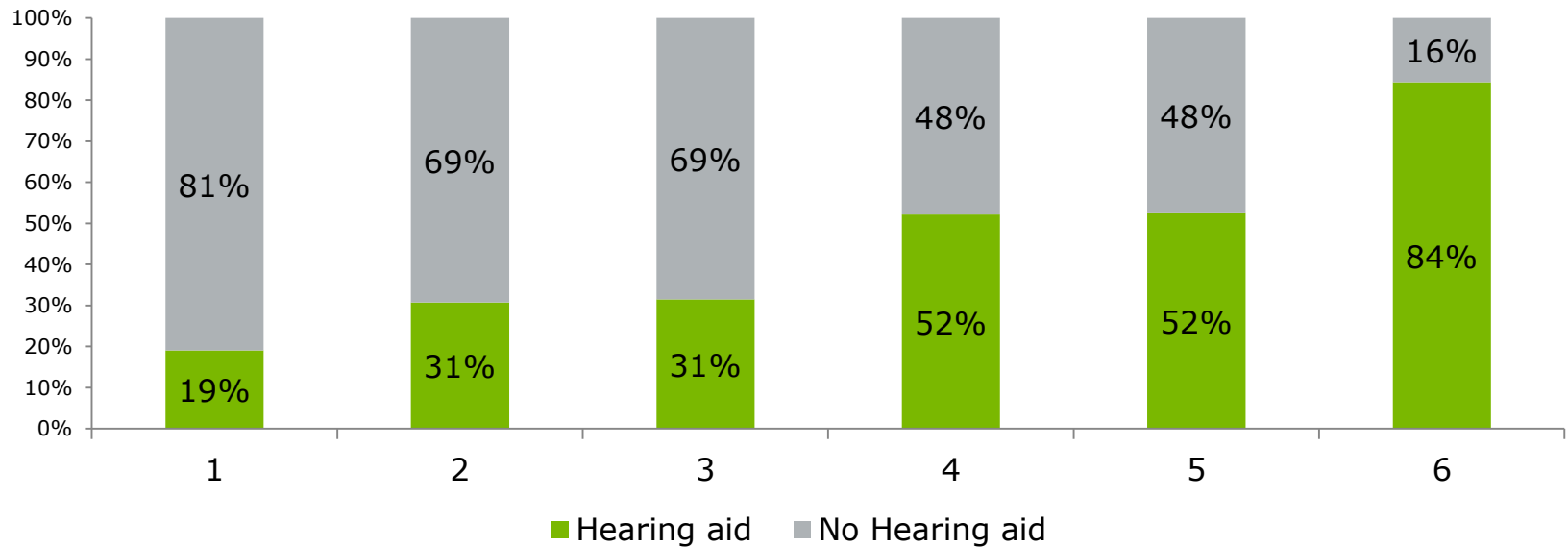


■ Hearing impaired (stated) ■ Adoption (% of population) ■ Adoption (% of stated impaired)

# 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**

HA-non-owner, n=557  
HA-owner, n=590

\* 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

	<b>HA-Non-owner</b> 2015: n=720 (2012: n= 795/ 2009: n= 822)	<b>HA Owner</b> 2015: n=605 (2012: n= 501/ 2009: n= 513)	<b>Hearing Aid Adoption (%)</b>
<b>Ears impaired (stated)</b>			
Unilateral loss	42% (44%/46%)	22% (24%/33%)	30% (30%/32%)
Bilateral loss	58% (57%/54%)	78% (76%/67%)	52% (51%/45%)
<b>Perceived loss</b>			
Mild	42% (43%/42%)	13% (9%/11%)	18% (13%/14%)
Moderate	49% (44%/50%)	56% (53%/57%)	46% (46%/42%)
Severe	8% (10%/5%)	26% (32%/29%)	70% (66%/73%)*
Profound	2% (4%/2%)	6% (6%/3%)	

n's are unweighted whereas the shown results are weighted

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

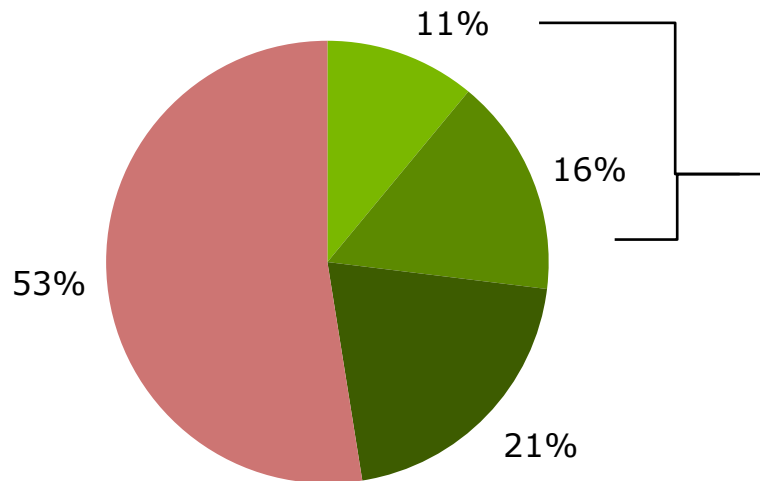
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# Hearing tests and where hearing is tested

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

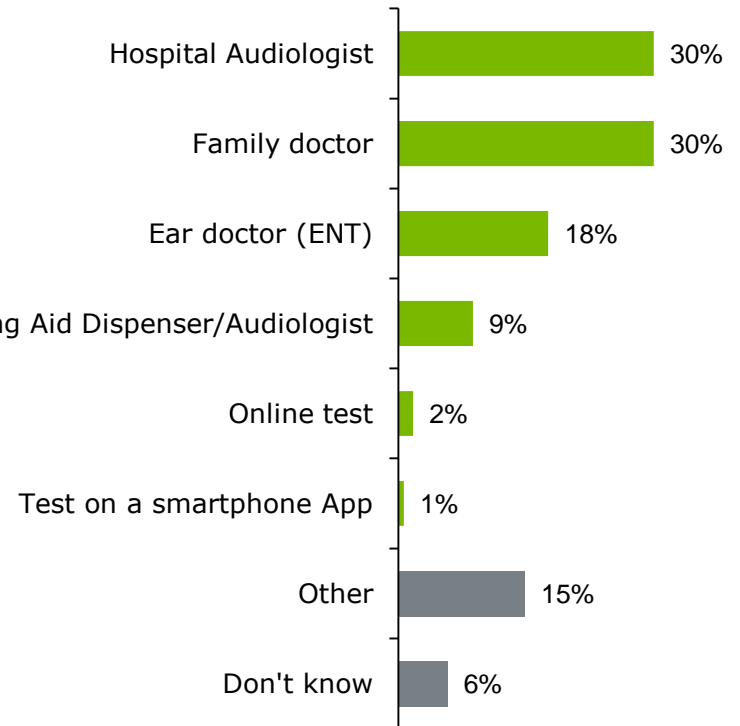
Have you ever taken a hearing test?

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



Base=10'841

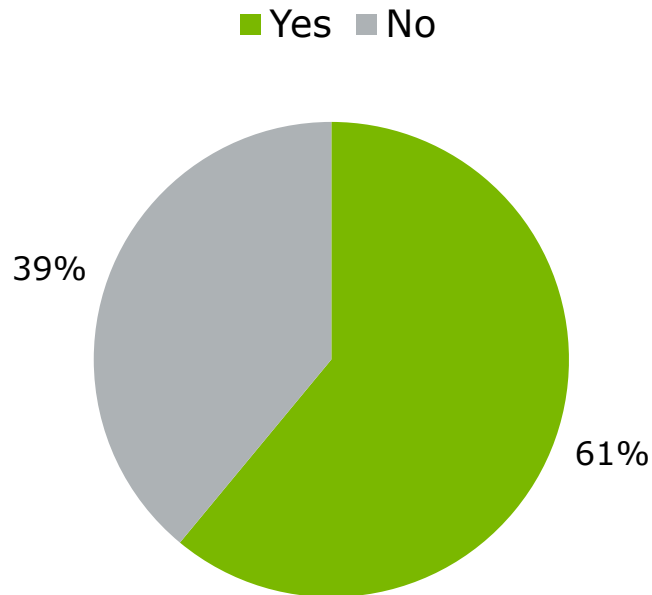
Where/how was your hearing tested?



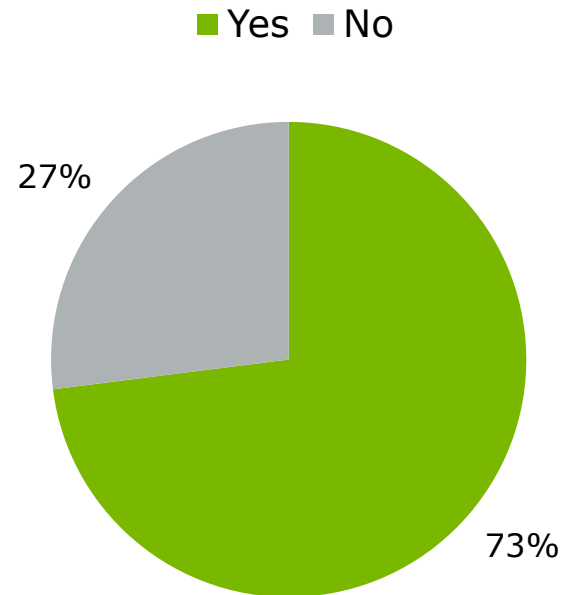
Base= 2'871

# 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?



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



Base=4'014

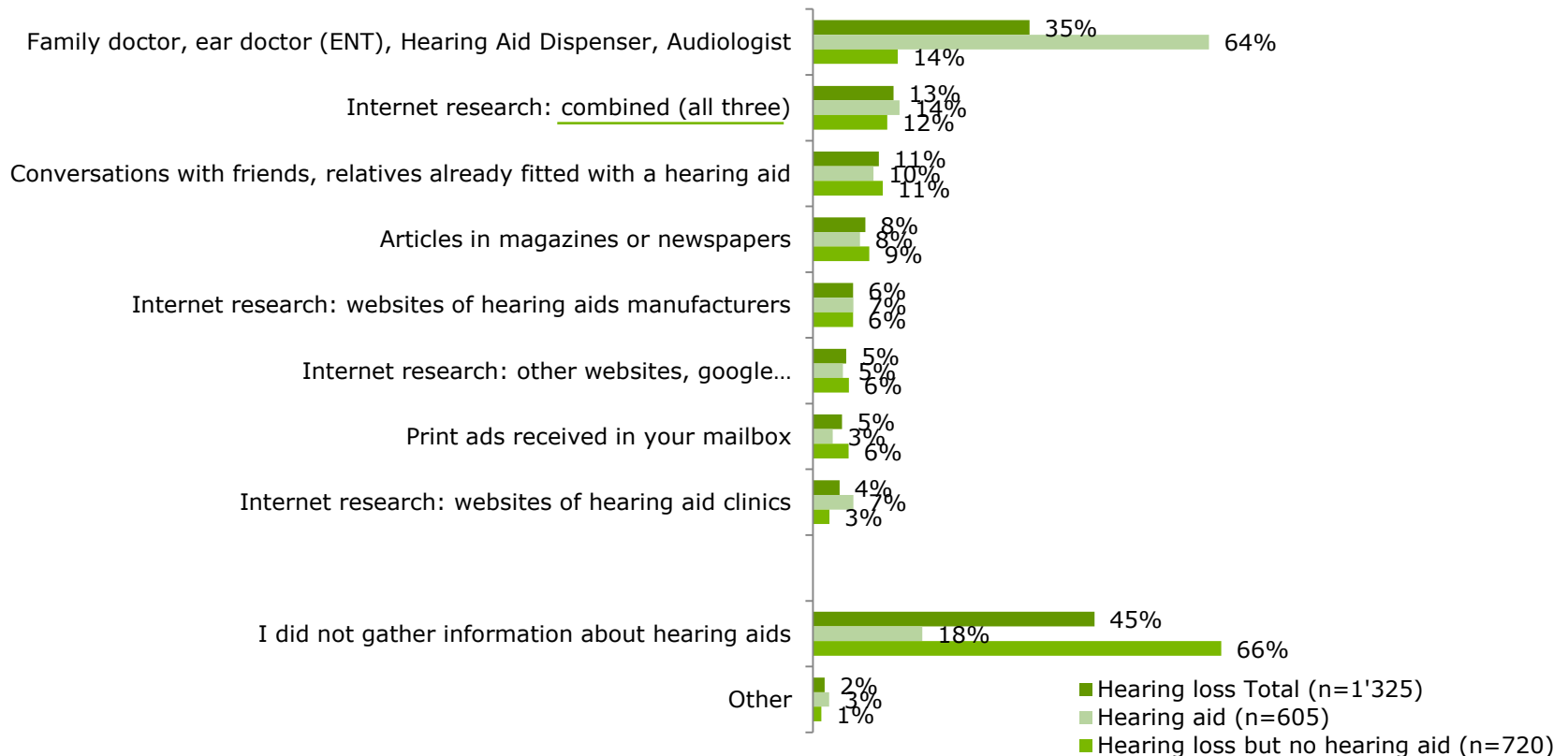
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# The route to the hearing aid: Sources of information and drop-out rates



Doctors and hearing aid dispensers are the most important sources of information and therefore the major gatekeepers – followed by other people with hearing aids.

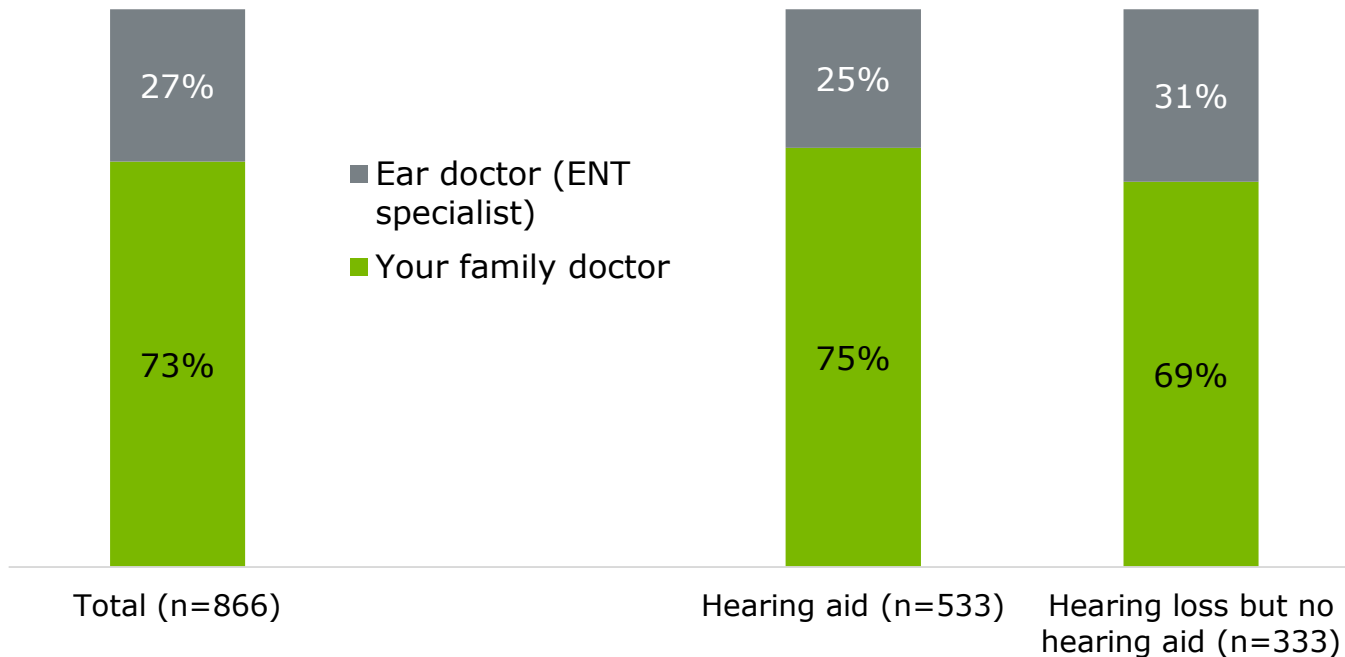
Where did you gather information about hearing aids?  
Please check all that apply.



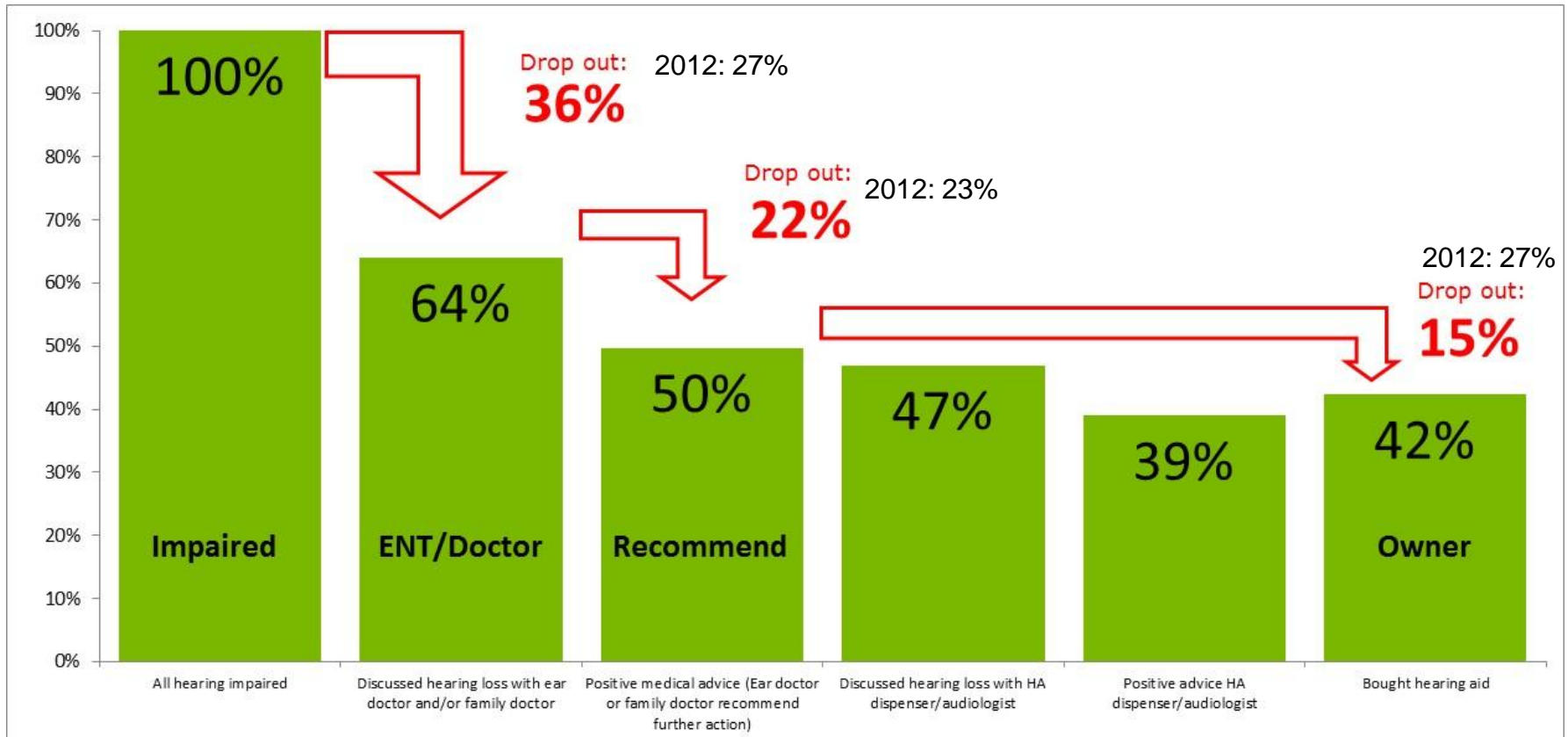
# Of those who discussed the hearing loss with a doctor, 73% talked to a family doctor (GP) first and 27% talked to an ENT first

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?



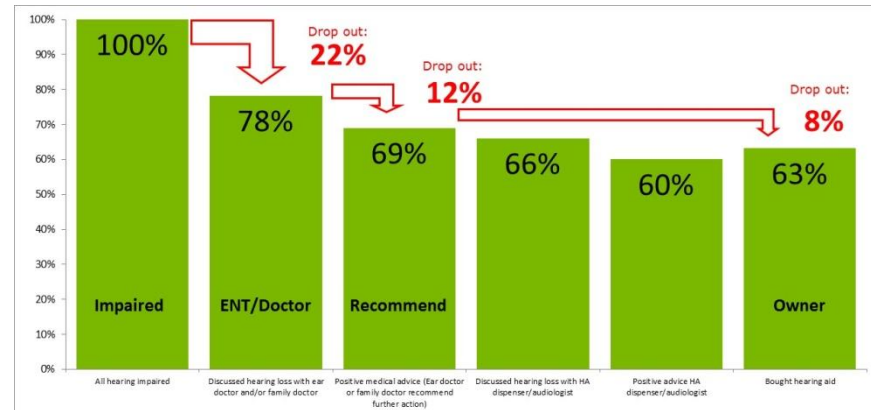
# The route to the hearing aid: Compared to 2012 drop out 3 was reduced slightly



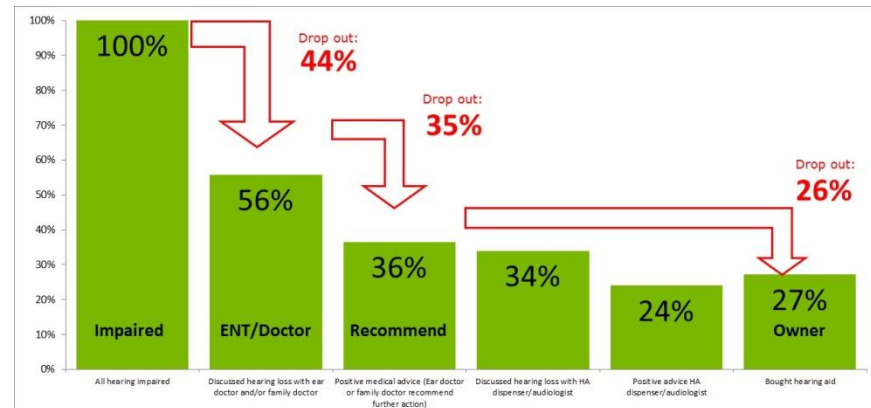
Base: n=1'325

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

Top 50% hearing loss\*



Low 50% hearing loss\*



Base: n=1'325

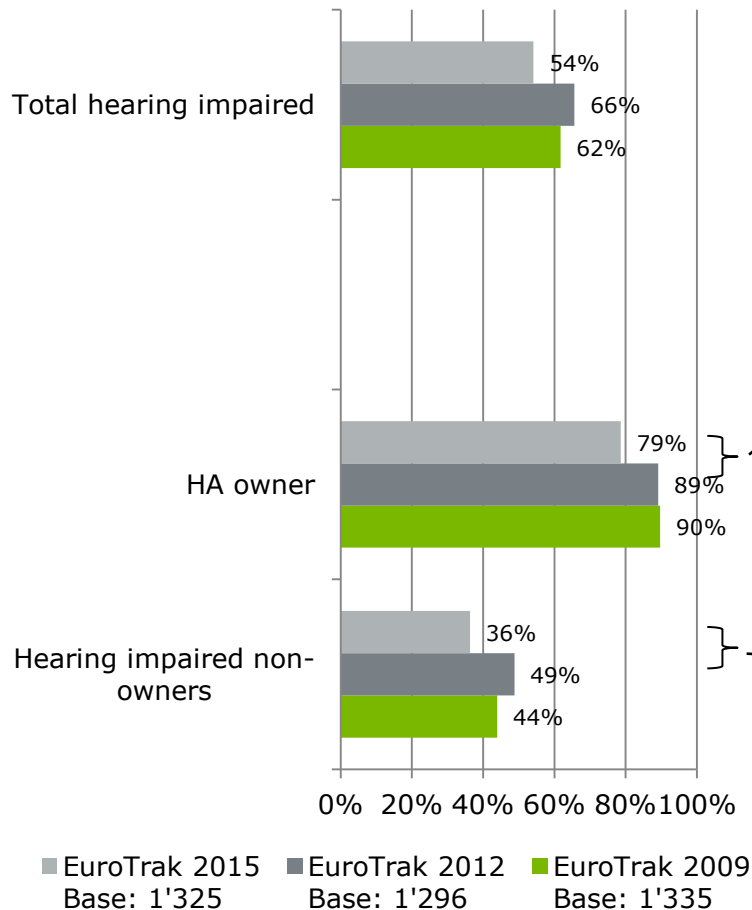
\* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

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

# The route to the hearing aid: GP/Family doctor

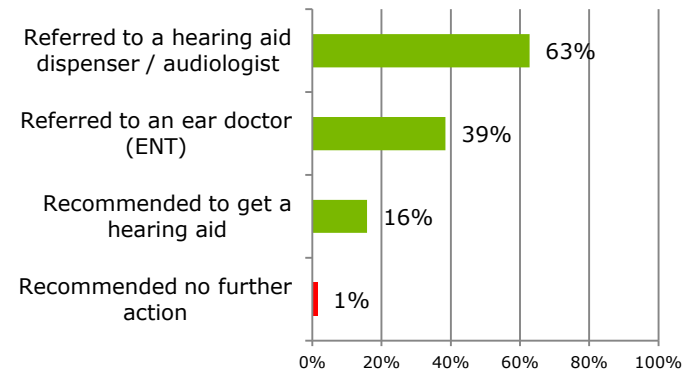
## Have you discussed your hearing problem with your family doctor?

**% Discussed with GP**

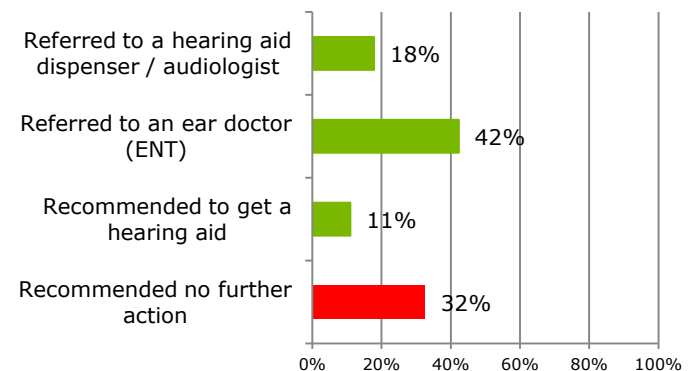


**What did he/she recommend ?**

### HA owner (Base: 479)

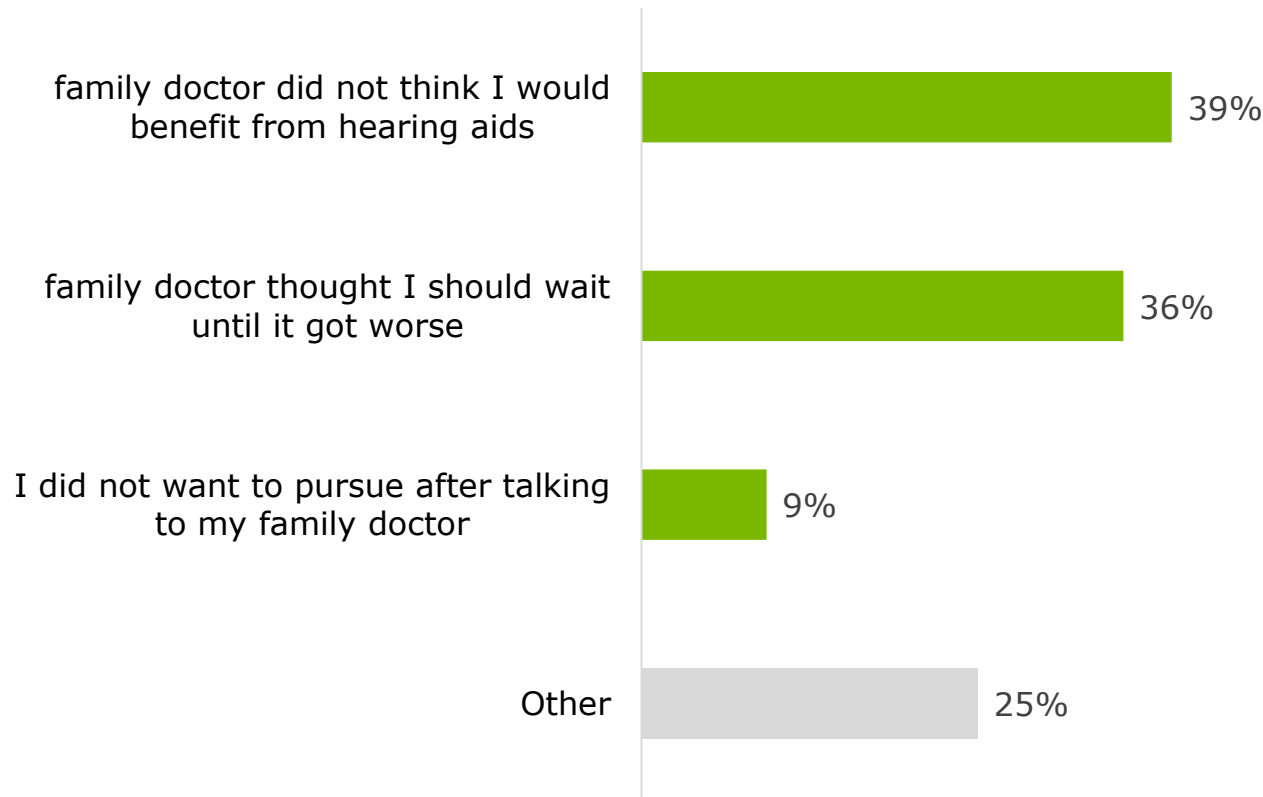


### Impaired non-owner (Base: 265)



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?

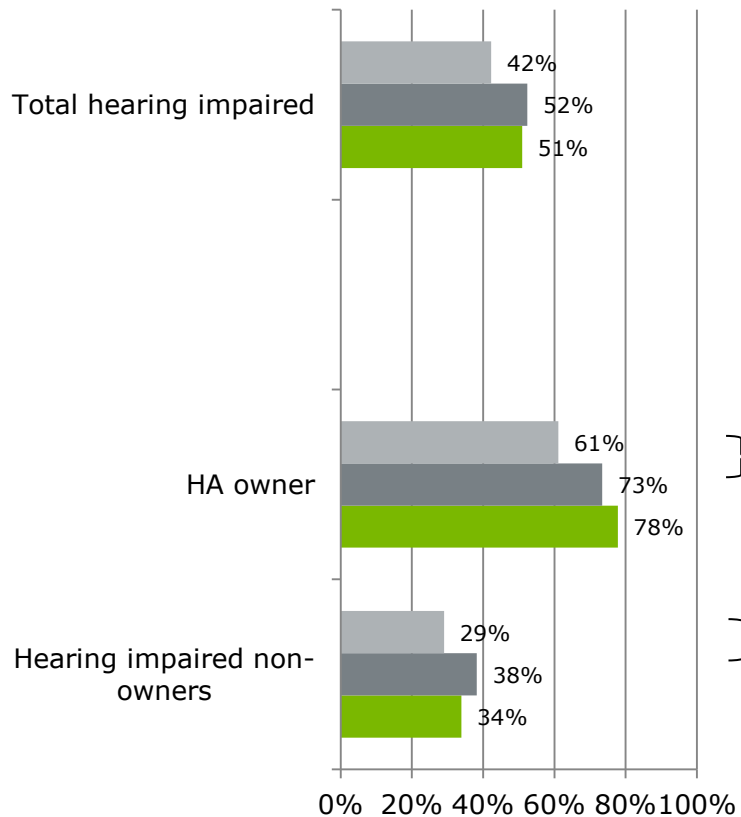


Base: n=95

# The route to the hearing aid: ENT

Have you discussed your hearing problem with an ear doctor (ENT)?

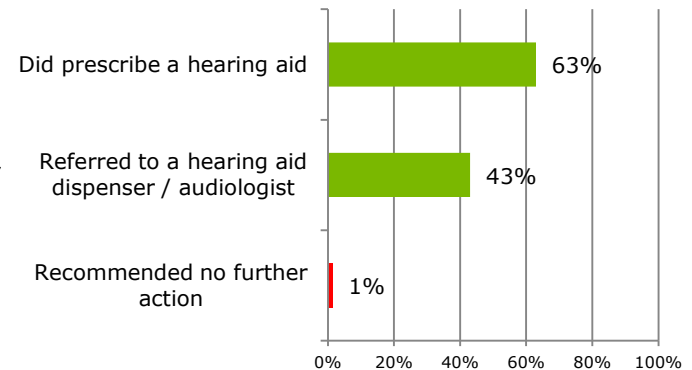
**% Discussed with ENT**



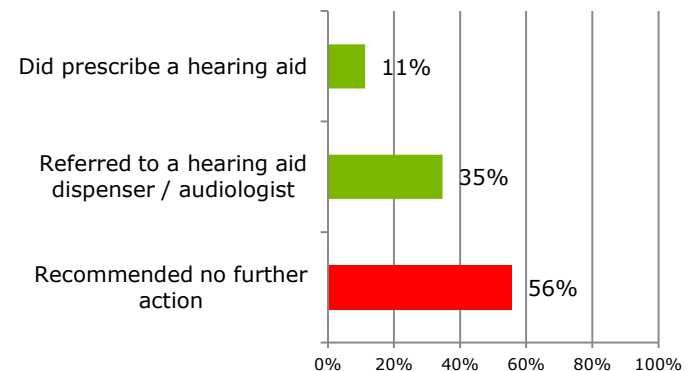
■ EuroTrak 2015 Base: 1'325   ■ EuroTrak 2012 Base: 1'296   ■ EuroTrak 2009 Base: 1'335

**What did he/she recommend ?**

## HA owner (Base: 383)



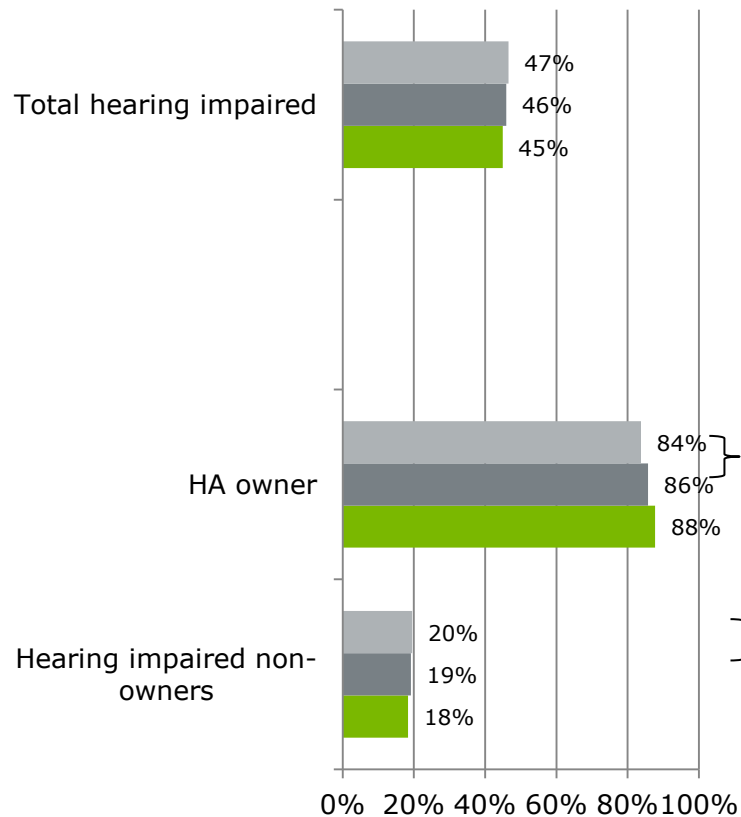
## Impaired non-owner (Base: 226)



# The route to the hearing aid: HA dispenser

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

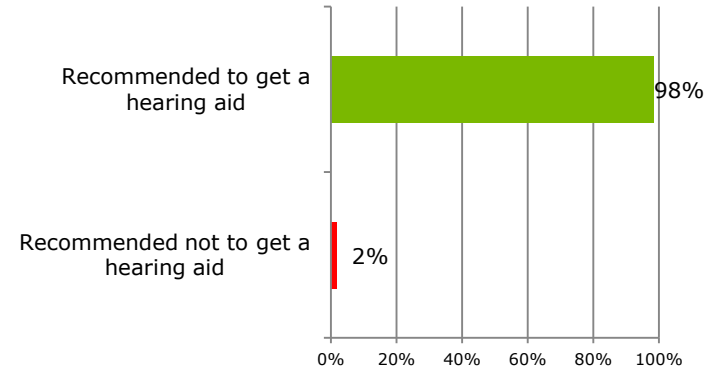
**% Discussed with Audiologist**



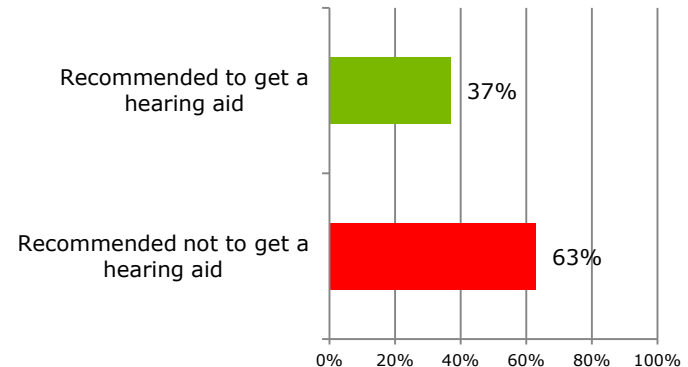
■ EuroTrak 2015 Base: 1'325  
 ■ EuroTrak 2012 Base: 1'296  
 ■ EuroTrak 2009 Base: 1'335

**What did he/she recommend ?**

**HA owner (Base: 508)**

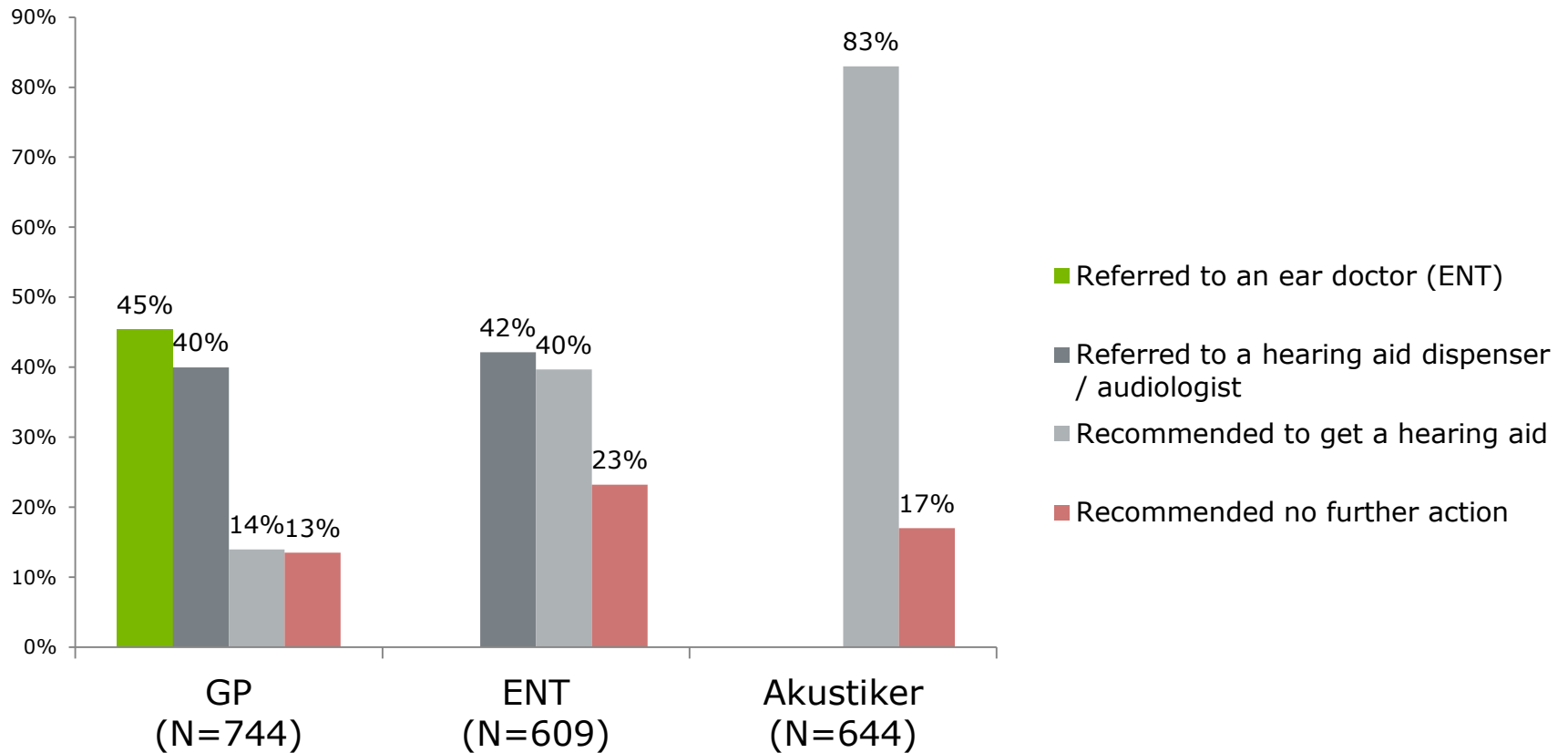


**Impaired non-owner (Base: 136)**



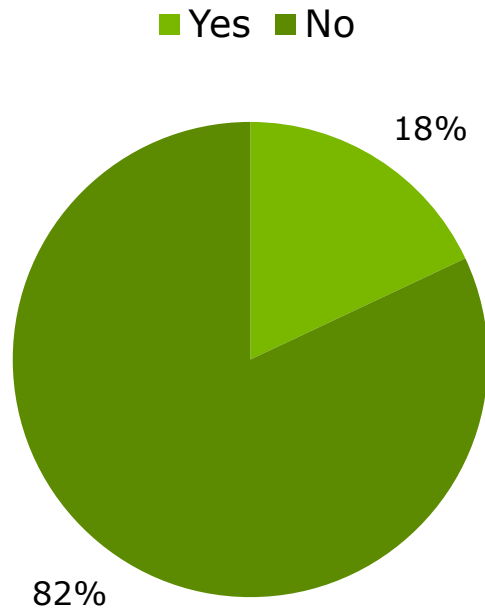


# Recommendations by profession



## 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)?



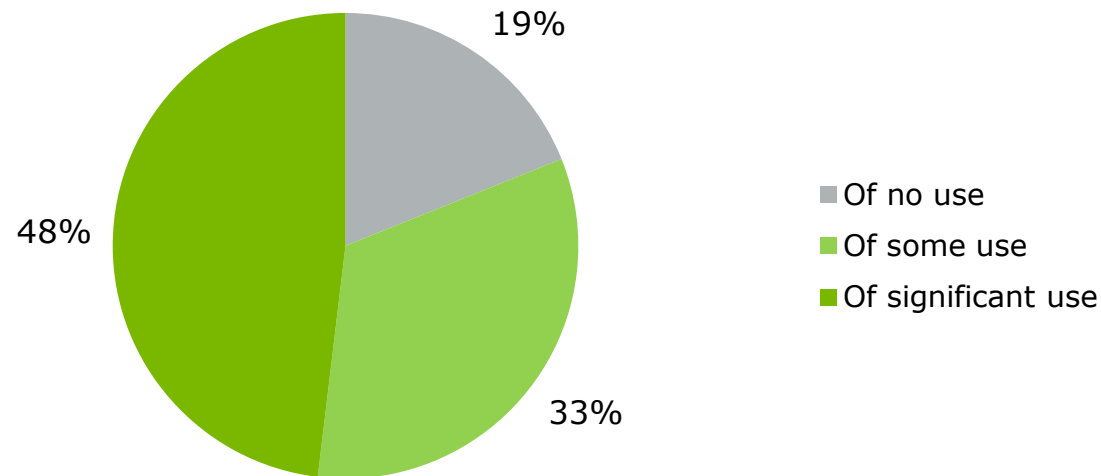
Base=782

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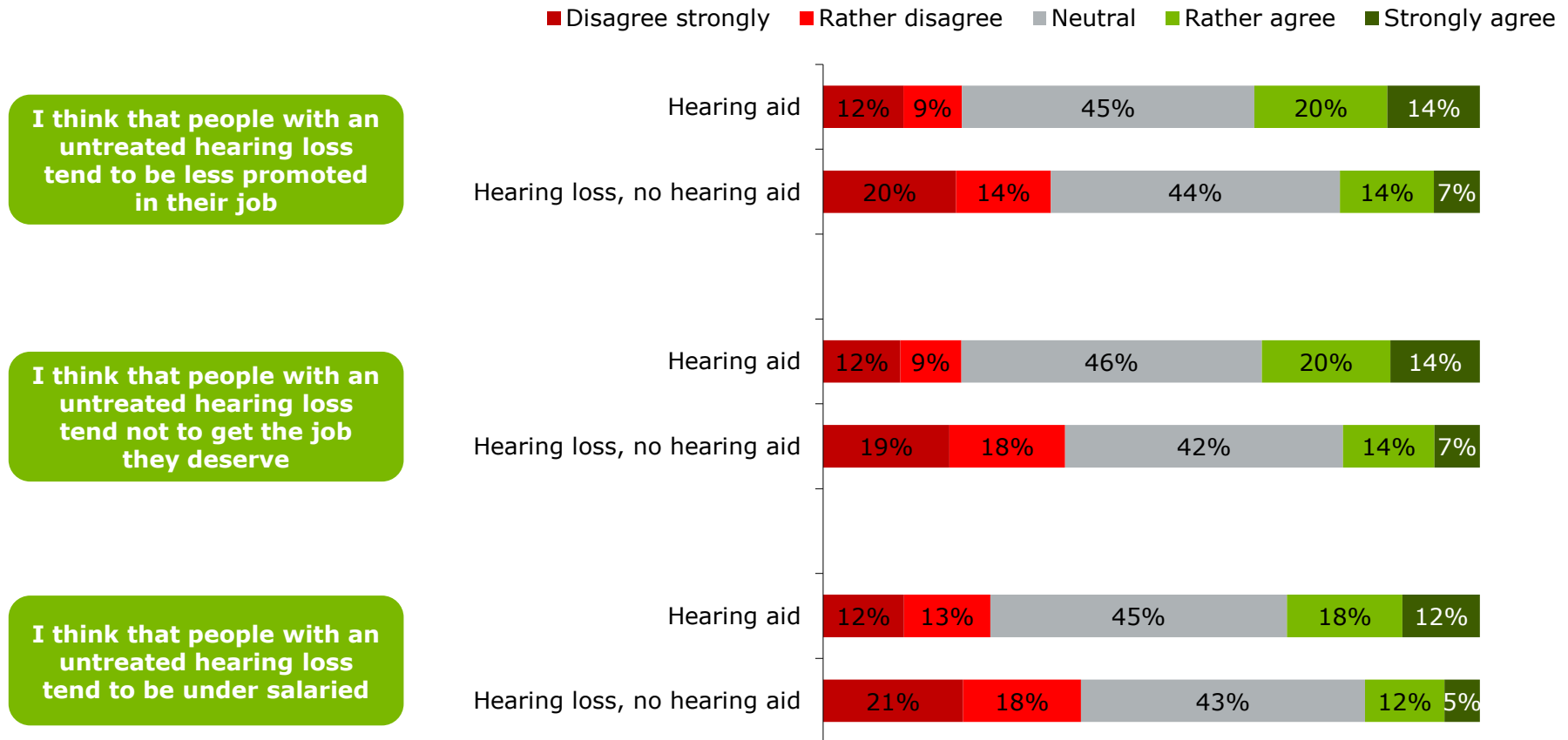
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality

**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?



**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.



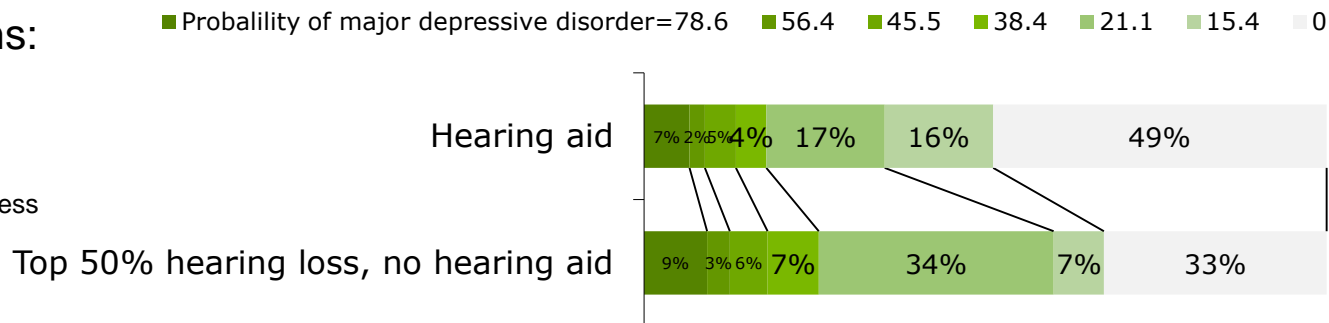
Base: Hearing loss, no hearing aid =480/ hearing aid n=364

**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\***).

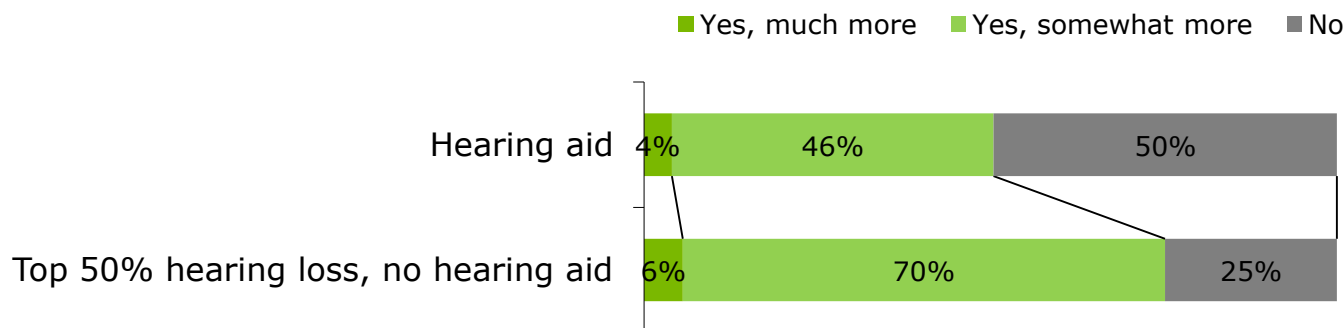
## Depression symptoms: PHQ-2 Screening:

In the last 2 weeks:

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



Getting more forgetful in  
the last year?



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:

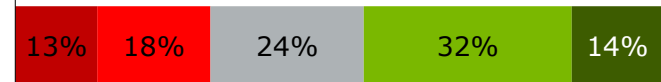
- Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
  - Scores on 6 APHAB-EC – like questions (Scaled 1-5)
  - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67%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

■ Disagree strongly ■ Rather disagree ■ Neutral ■ Rather agree ■ Strongly agree

In the evenings I often feel physically exhausted

Hearing aid

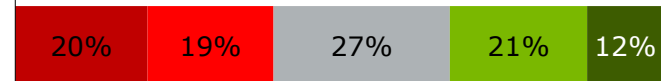


Top 50% hearing loss, no hearing aid

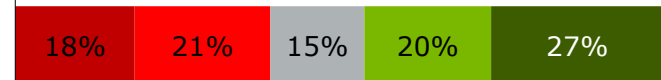


In the evenings I often feel mentally exhausted

Hearing aid



Top 50% hearing loss, no hearing aid



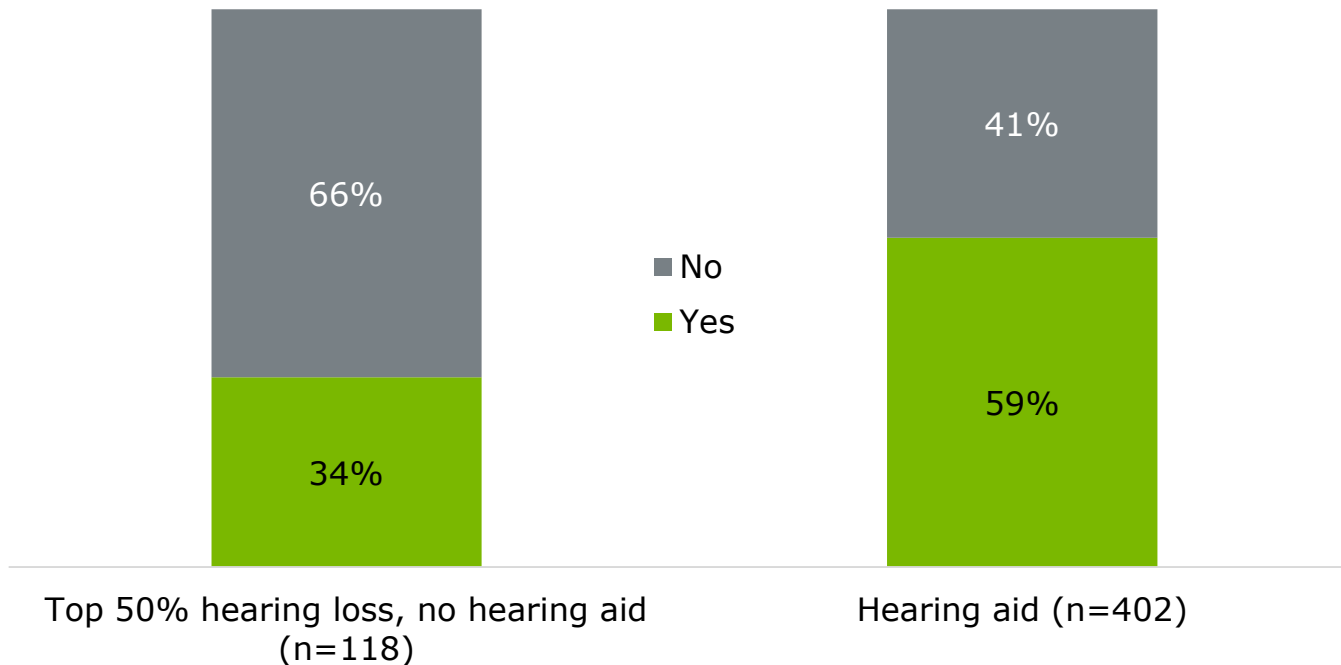
Base : Top 50% n=115 / hearing aid n=395

\*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?





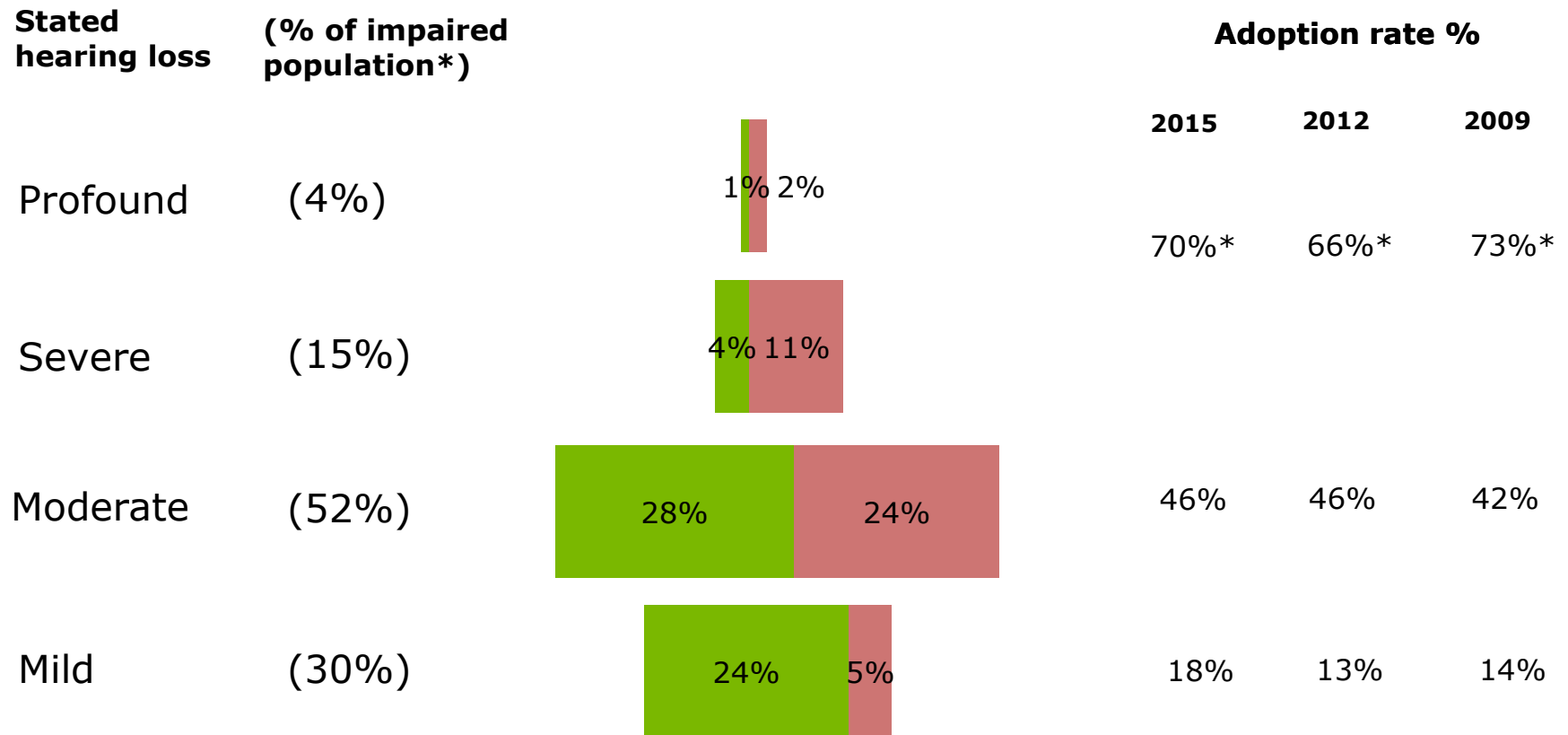
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## 3. Analysis of hearing aid owners

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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



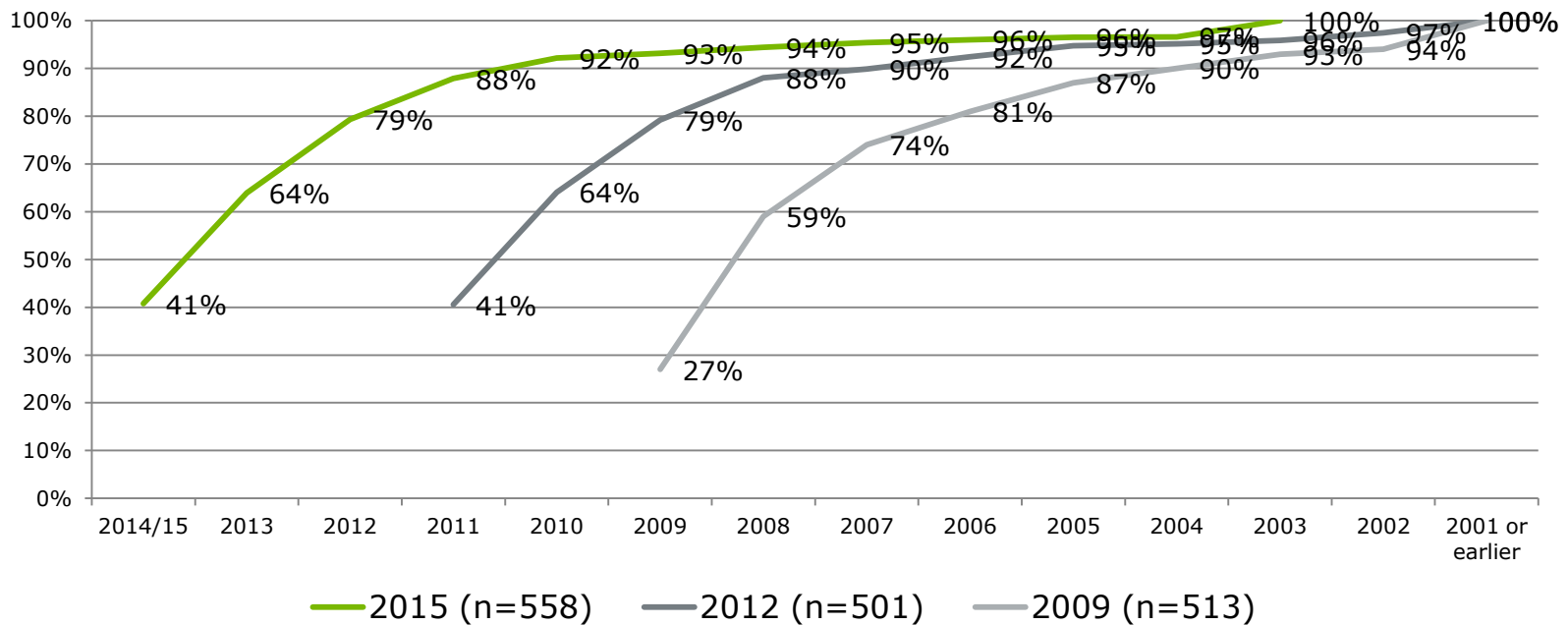
Base: n=1'302

Sums can differ from 100% due to rounding

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

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

## Year of purchase



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

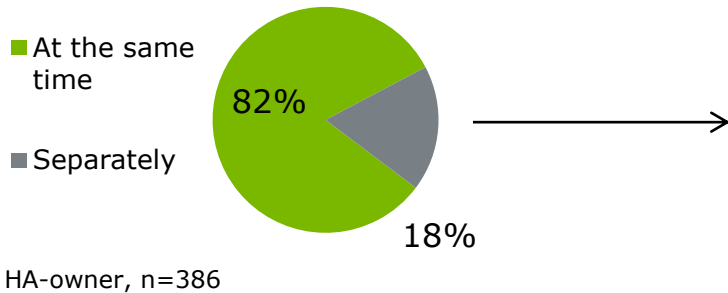
2015: 2.1 years

2012: 2.1 years

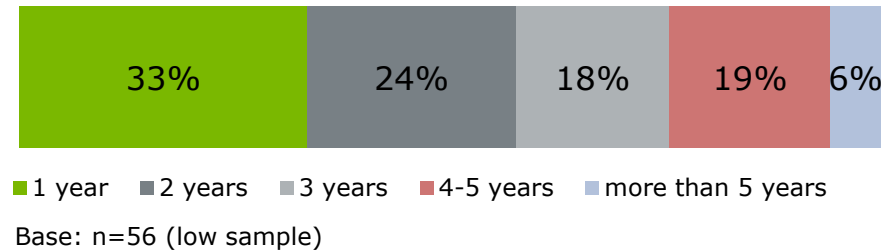
2009: 2.6 years

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.

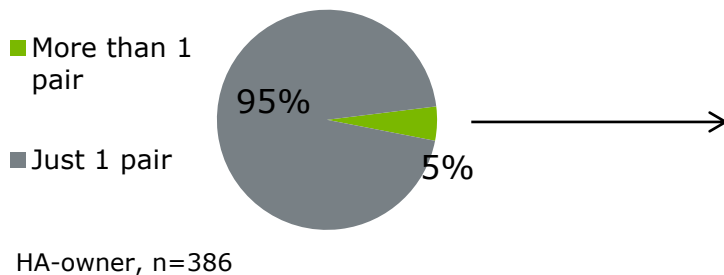
*If 2 HAs: Did you get them both at the same time or separately?*



How many years apart did you get your hearing aids?



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



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



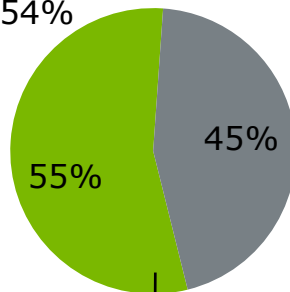
Base (=more than 1 pair, purchased in private sector: n=7 (very low sample!!))

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?

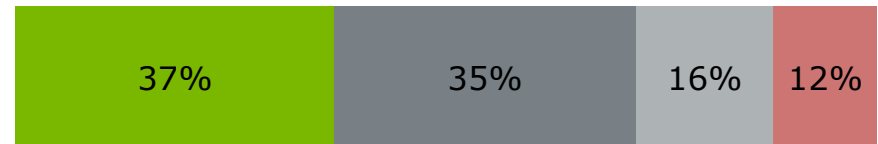
2012: 54%

■ Yes  
■ No



HA-owner, n=605

How many years did you own your previous HAs?

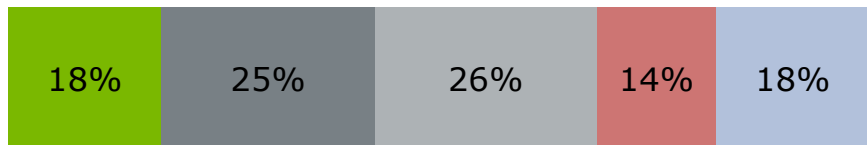


■ 1-3 years ■ 4-6 years ■ 7-10 years ■ 11 years or longer

Base: n=220

Age of HA before it has been replaced:  
2015: 4 years (median)  
2012: 5 years (median)

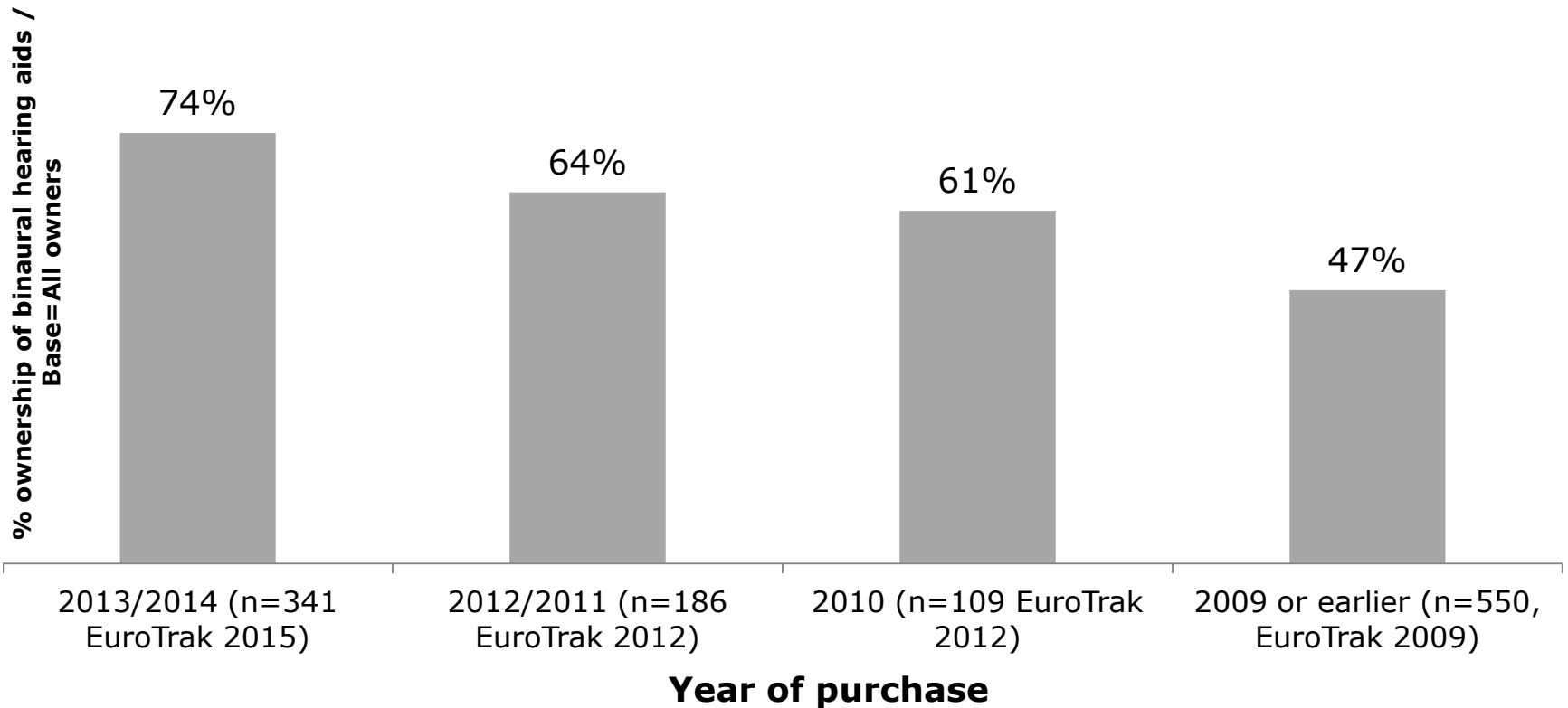
Thinking back before you purchased your first hearing aid: How many years have passed since you became aware of your hearing loss until you purchased a hearing aid?



■ 1 year ■ 2 years ■ 3 years ■ 4-6 years ■ more than 6 years

Base: n=302

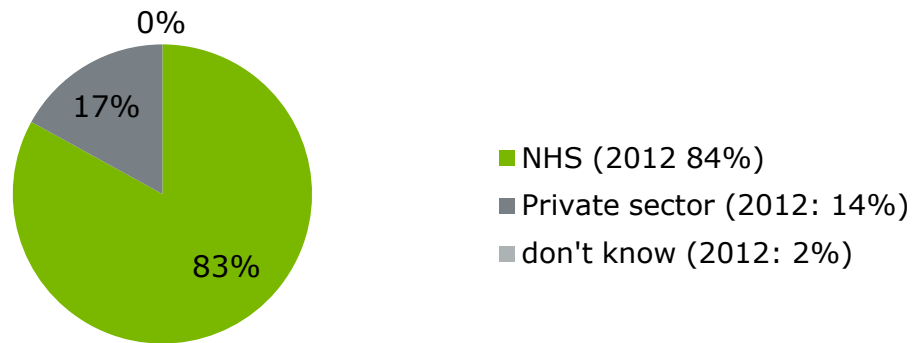
# Monaural-binaural treatment by purchase date



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

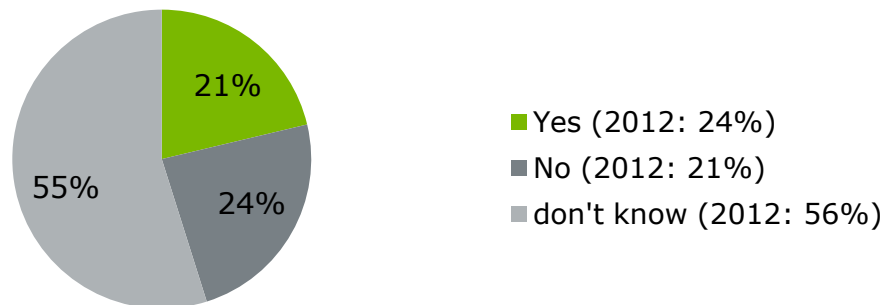
2015

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



HA-owner, n=605

**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)

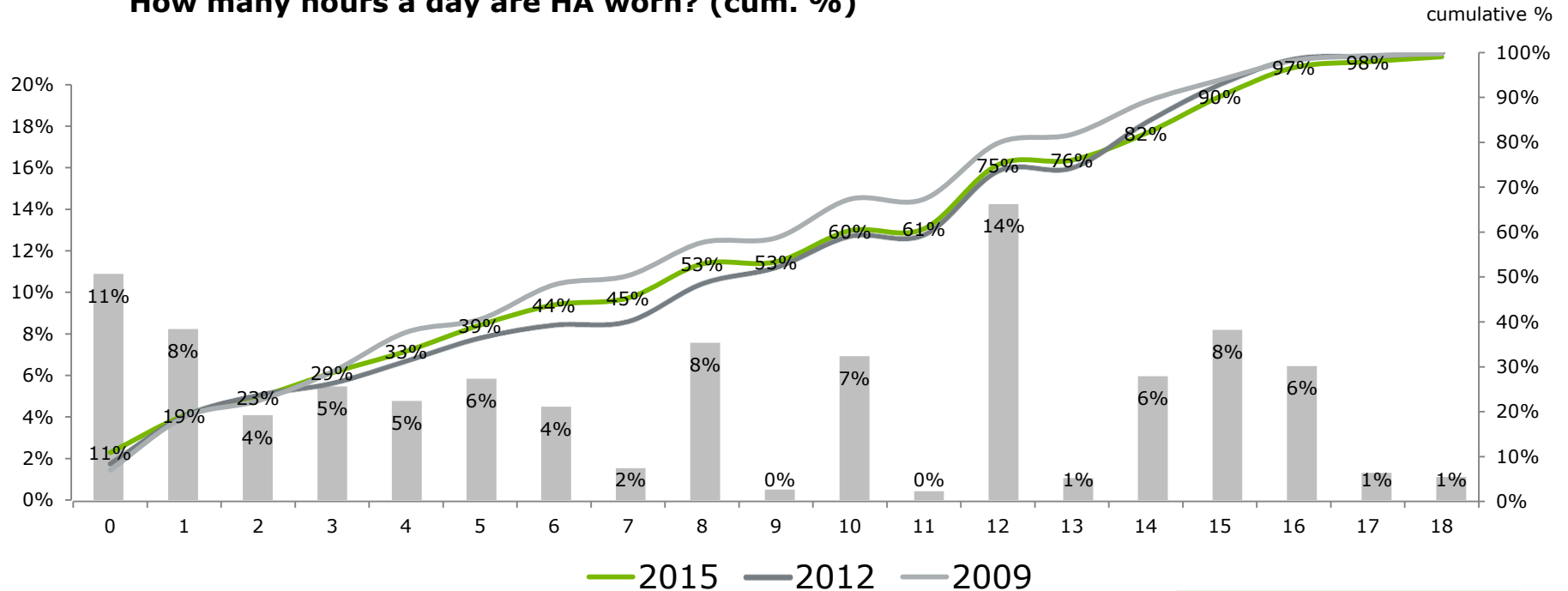


HA-non-owners, n=720



# On average, HAs are worn 8.1 hours a day

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



**HA worn:**  
 2015 Mean: 8.1 hours/day  
 2012 Mean: 8.3 hours/day  
 2009 Mean: 7.5 hours/day

HA-owner:  
 2015: n=605  
 2012: n=501  
 2009: n=513

*If binaurally fitted: Approximately how many hours a day is the left aid worn and how many hours is the right aid worn?*

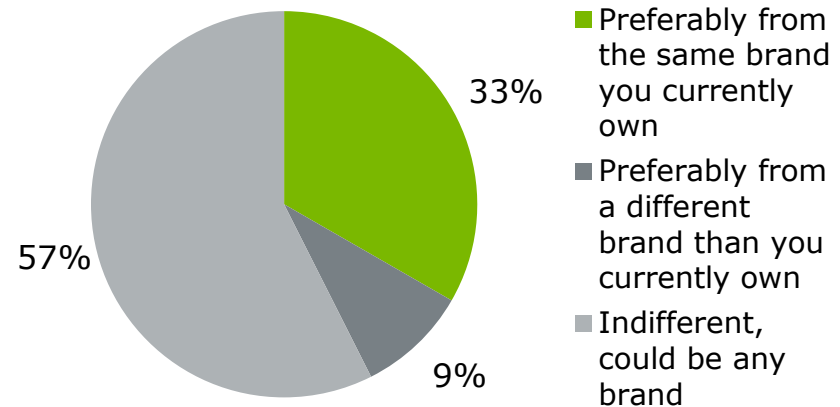
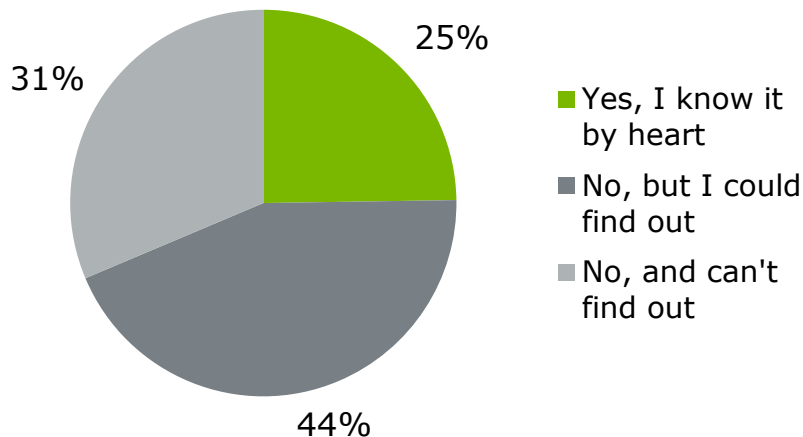
-97%: usually wear them together (N=386)

-if not worn together (3%, N=14!): Left HA: 5.0 hours/day, right HA: 3.7 hours/day

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

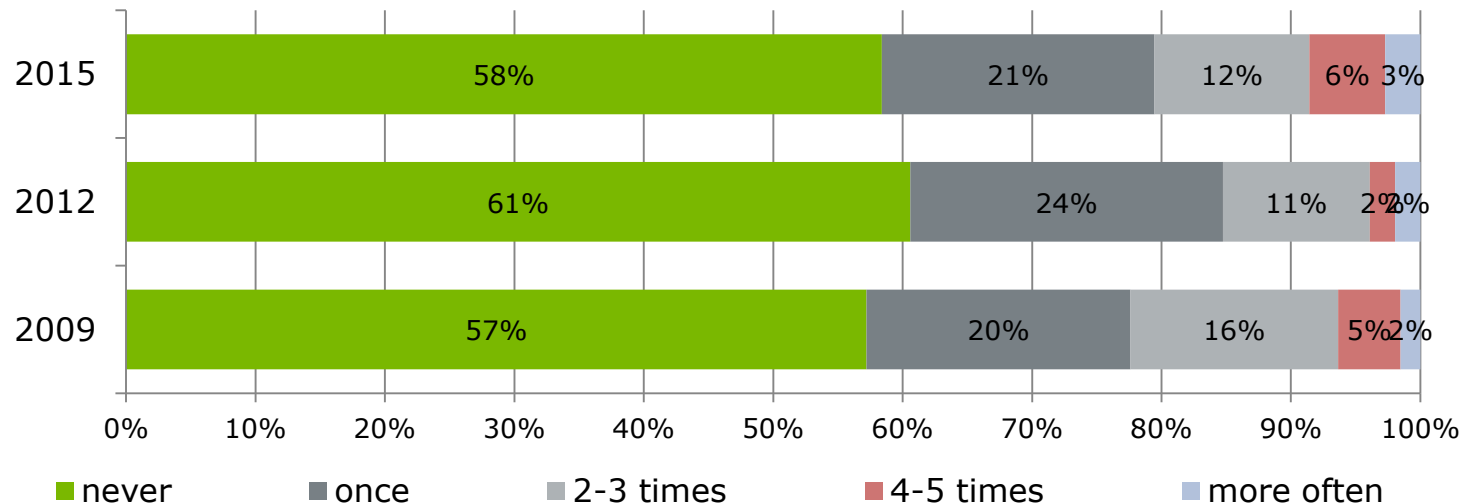
**Are you aware of the brand of your hearing aid(s)?**

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

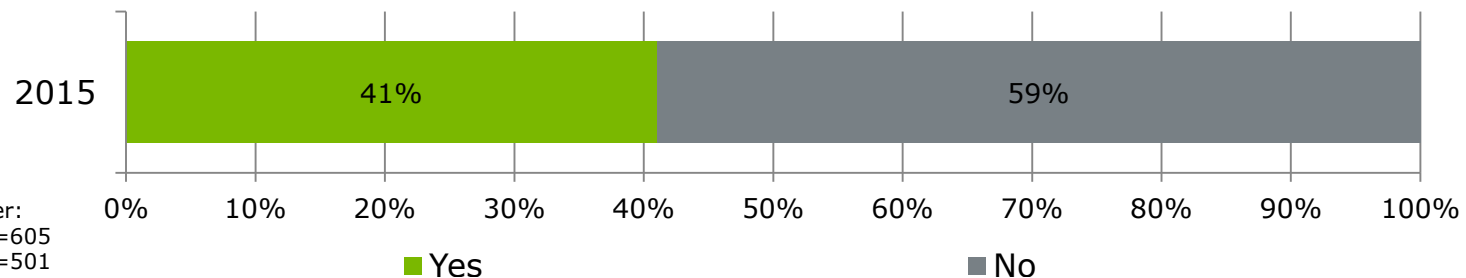


79% of the currently owned HAs either had no repair need or only once, 59% have never had a service

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



**Have you ever had your hearing aid serviced?**



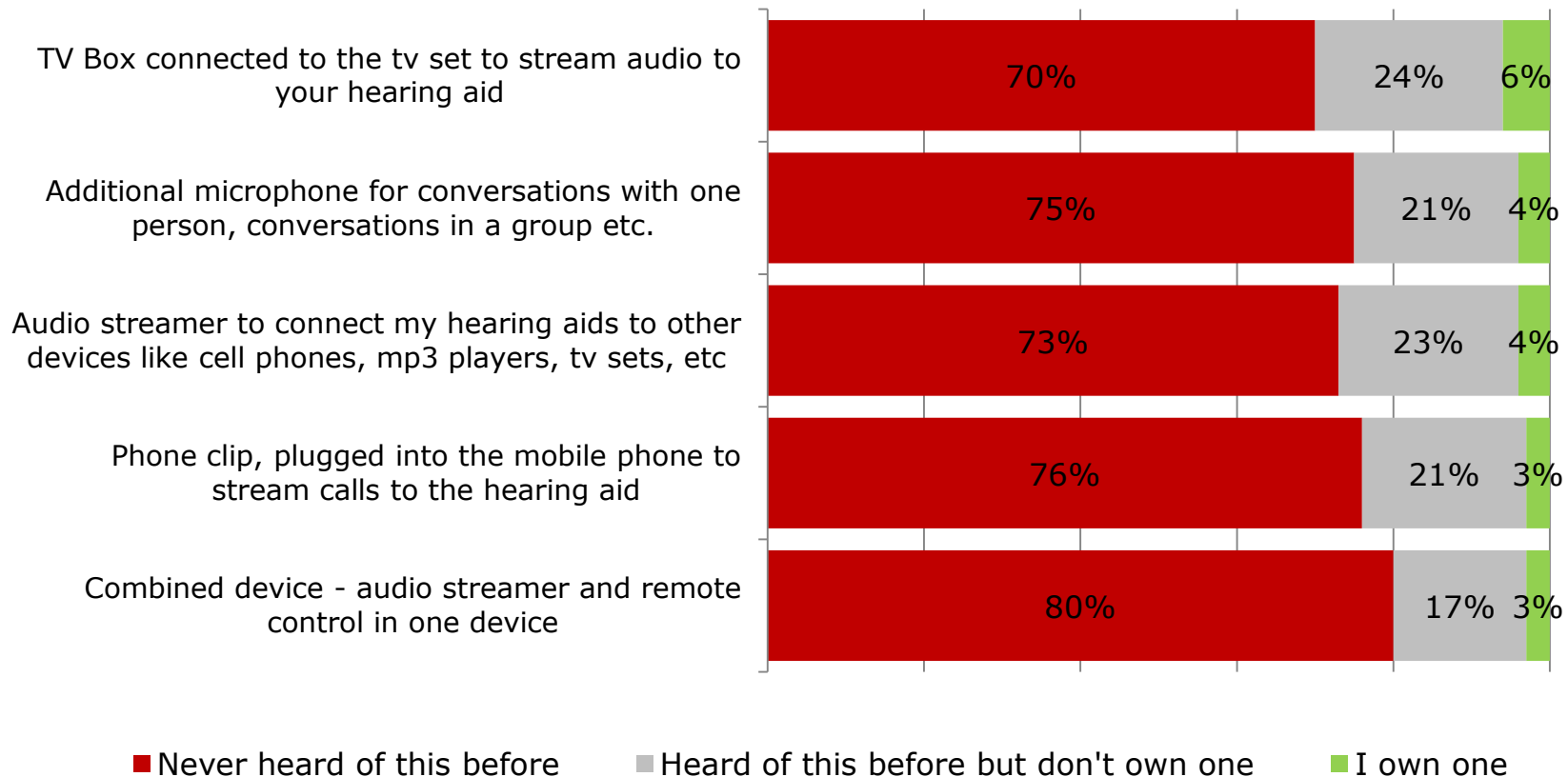
HA-owner:  
2015: n=605  
2012: n=501  
2009: n=513

---

# Awareness and usage of accessories and Telecoil

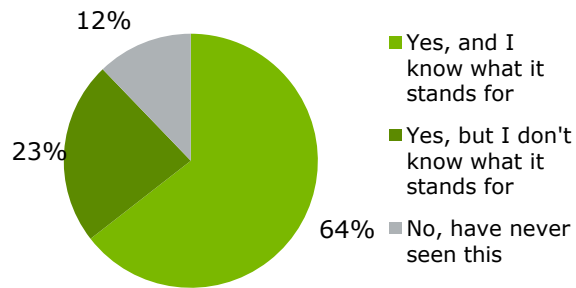
TV Box is the most often owned electronic accessory: 6 % of hearing aid owners have one – 24% have heard of it but don't own one.

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

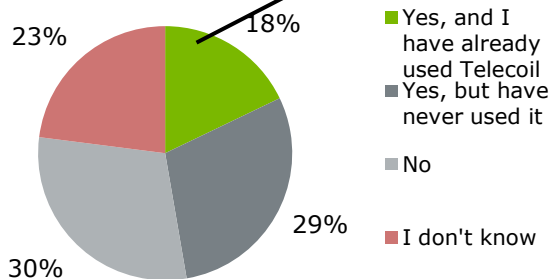


64% of hearing aid owners know what Telecoil is and 18% have used it – mainly in theatre or house of worship. Those who use it are satisfied.

### Have you seen this logo before?

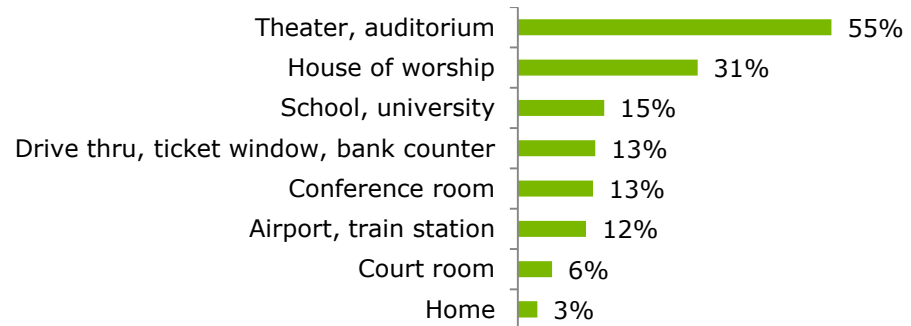


### Are your hearing aids equipped with Telecoil?

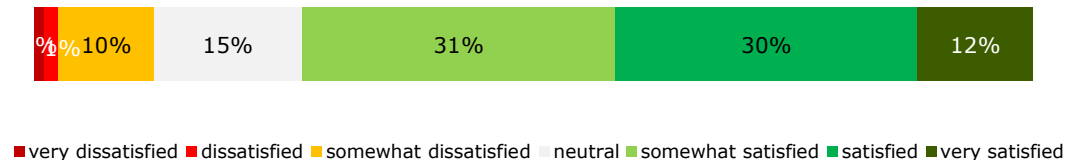


HA-owner, n=605

### On what type of venues have you used hearing aids in a hearing loop (Telecoil)?



### How satisfied are you with the use of Telecoil overall?



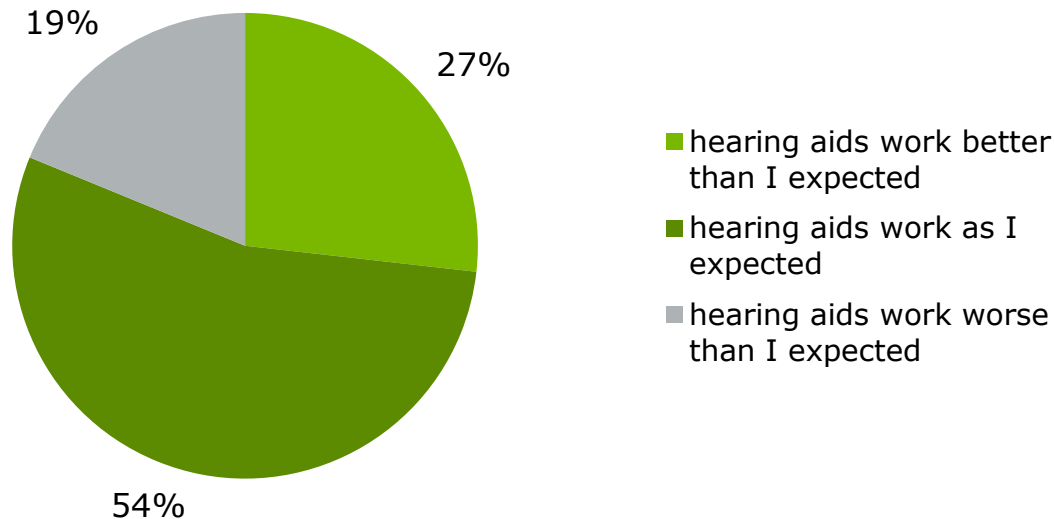
HA-owner, who have used Telecoil, n=118

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# Satisfaction with hearing aids and drivers

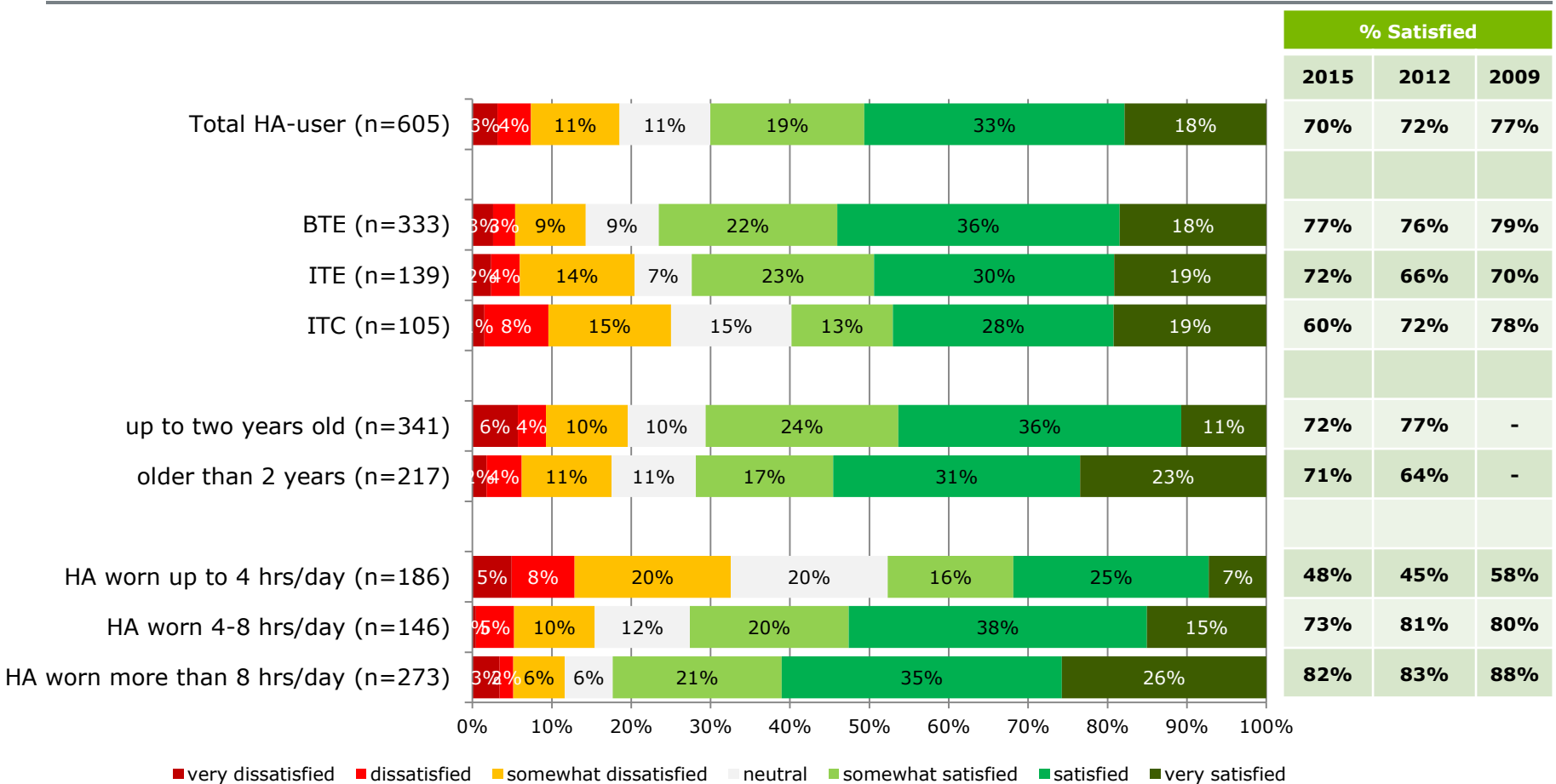
# 81% of the hearing aid owners say their hearing aid works better than or as expected

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





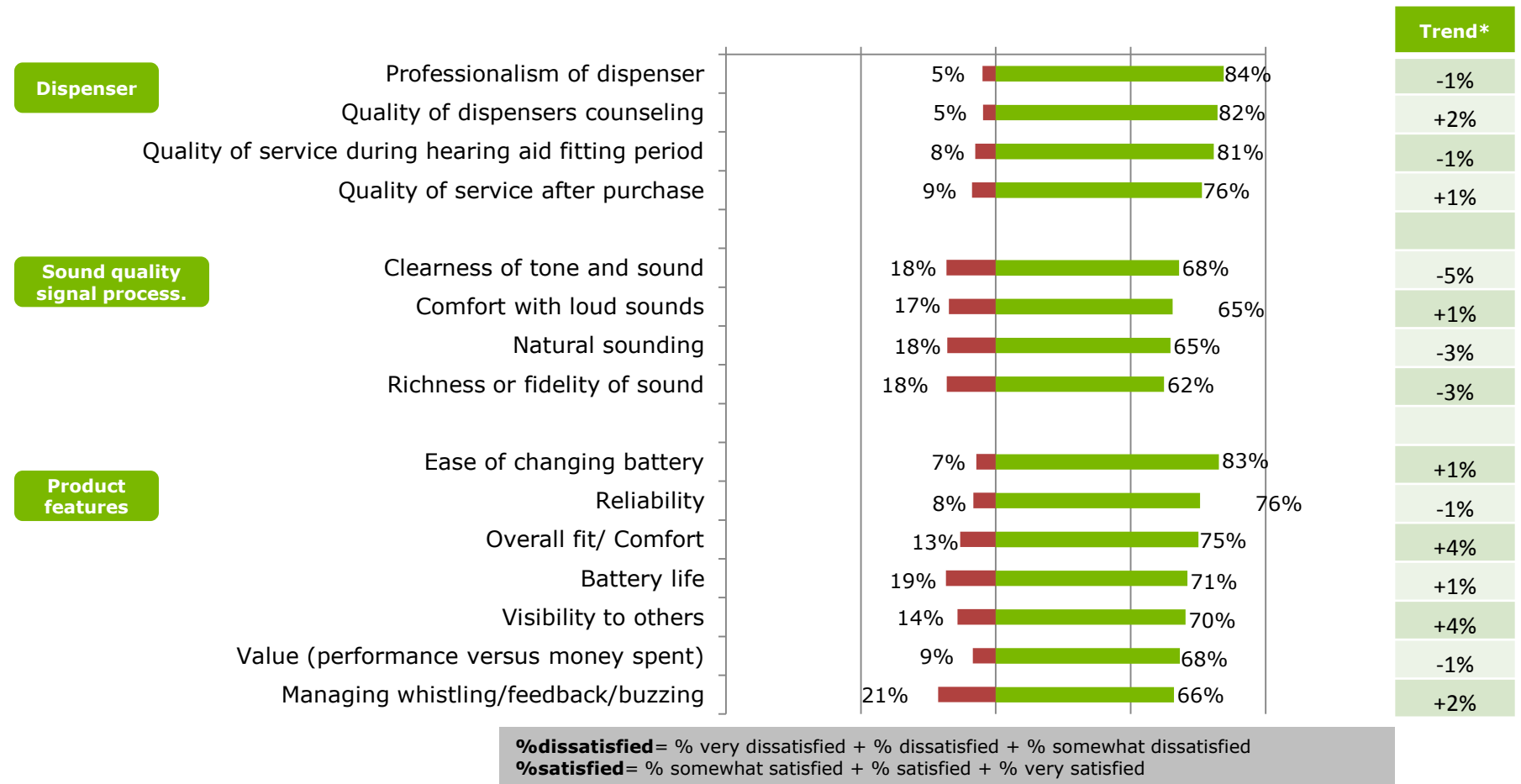
# Overall satisfaction with HA is 70% in the UK



# Overall Satisfaction with HA: Country comparison

	France	Switzerland	UK	Denmark	Norway	Italy	Japan
Overall satisfaction 2012	80%	84%	72%	70%	72%	70%	36%
Overall satisfaction 2015	84%	81%	70%				

# Satisfaction with current hearing aids



\* % of satisfied HA owners compared to EuroTrak 2012

■ dissatisfied ■ satisfied

HA-owner, n=605

# Satisfaction with current hearing aids



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

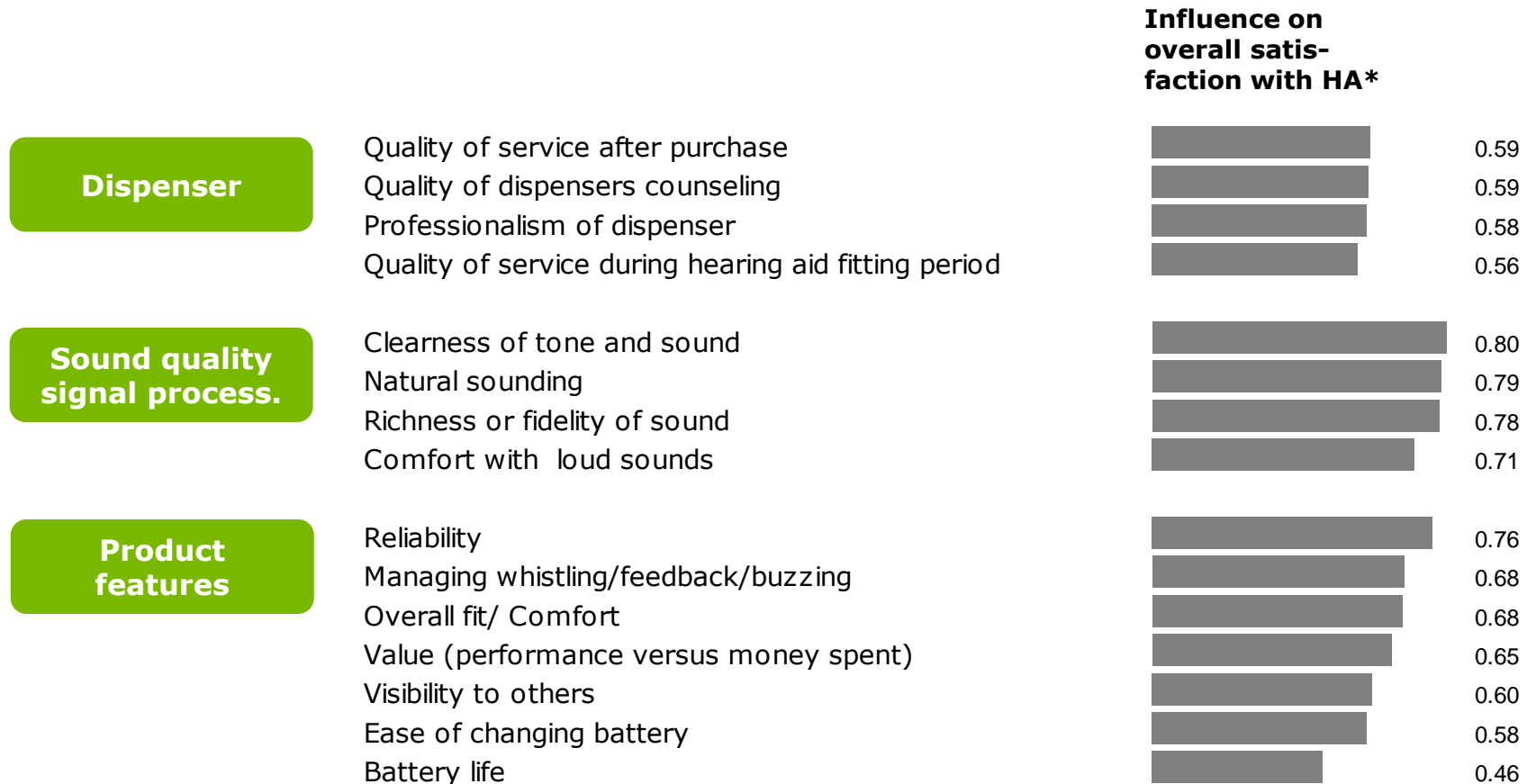
\* % of satisfied HA owners compared to EuroTrak 2012

\*\* question slightly changed: 2012=Understanding a lecture in a large public place

■ dissatisfied ■ satisfied

HA-owner, n=605

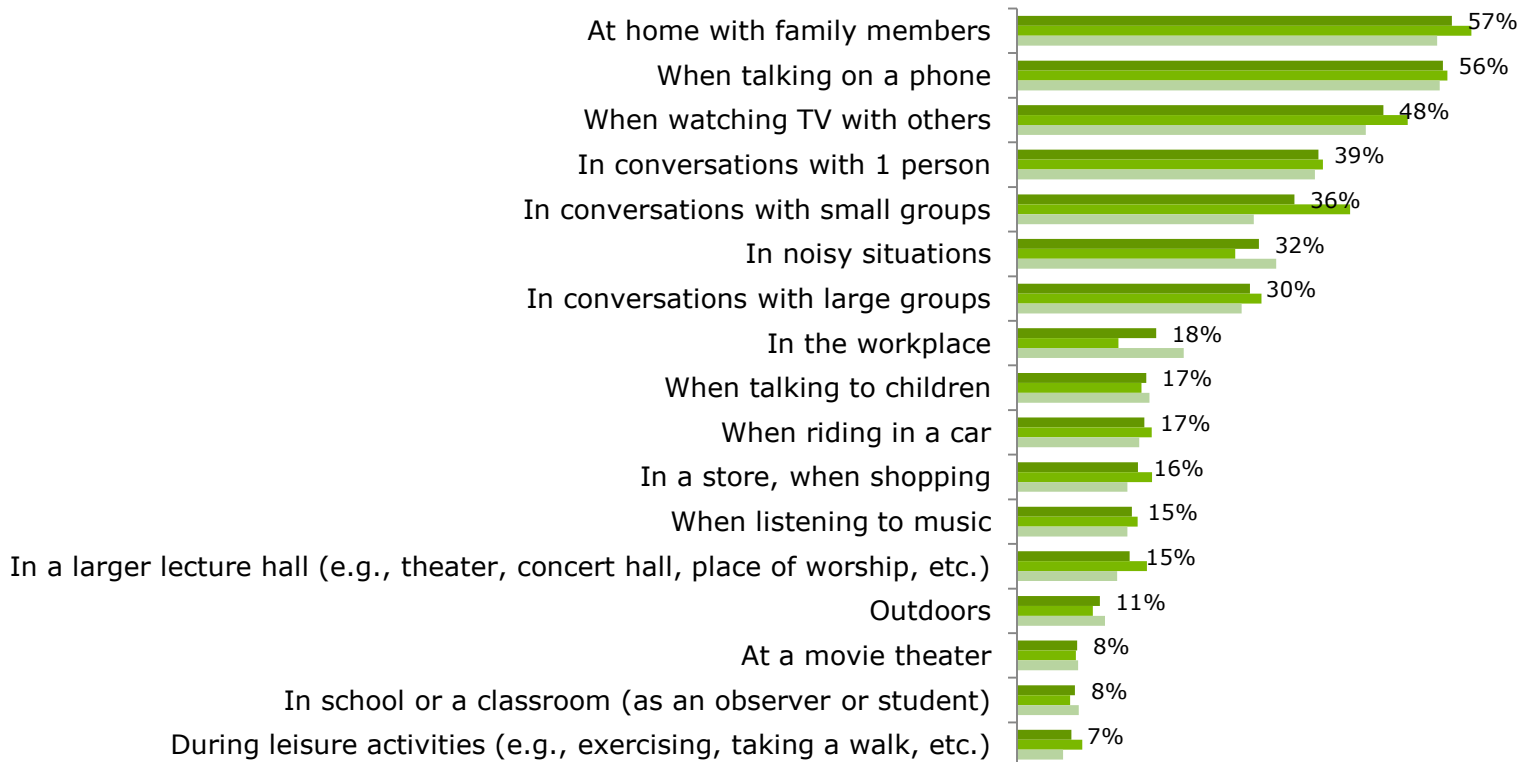
# Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA



\*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. Page 61

# Important listening situations

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



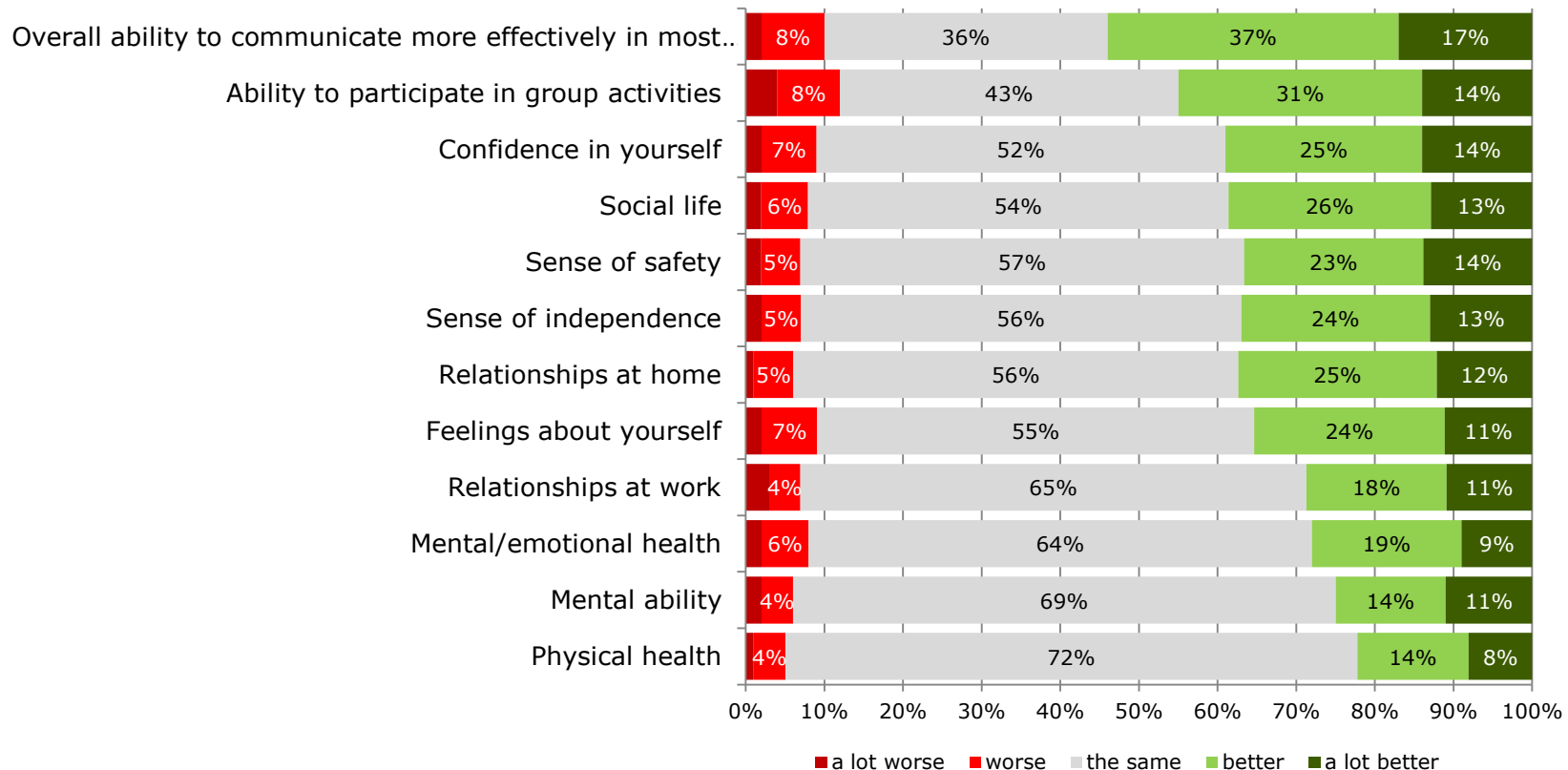
■ Hearing loss Total (n=1'325)  
 ■ Hearing aid (n=605)  
 ■ Hearing loss but no hearing aid (n=720)

---

# 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).**

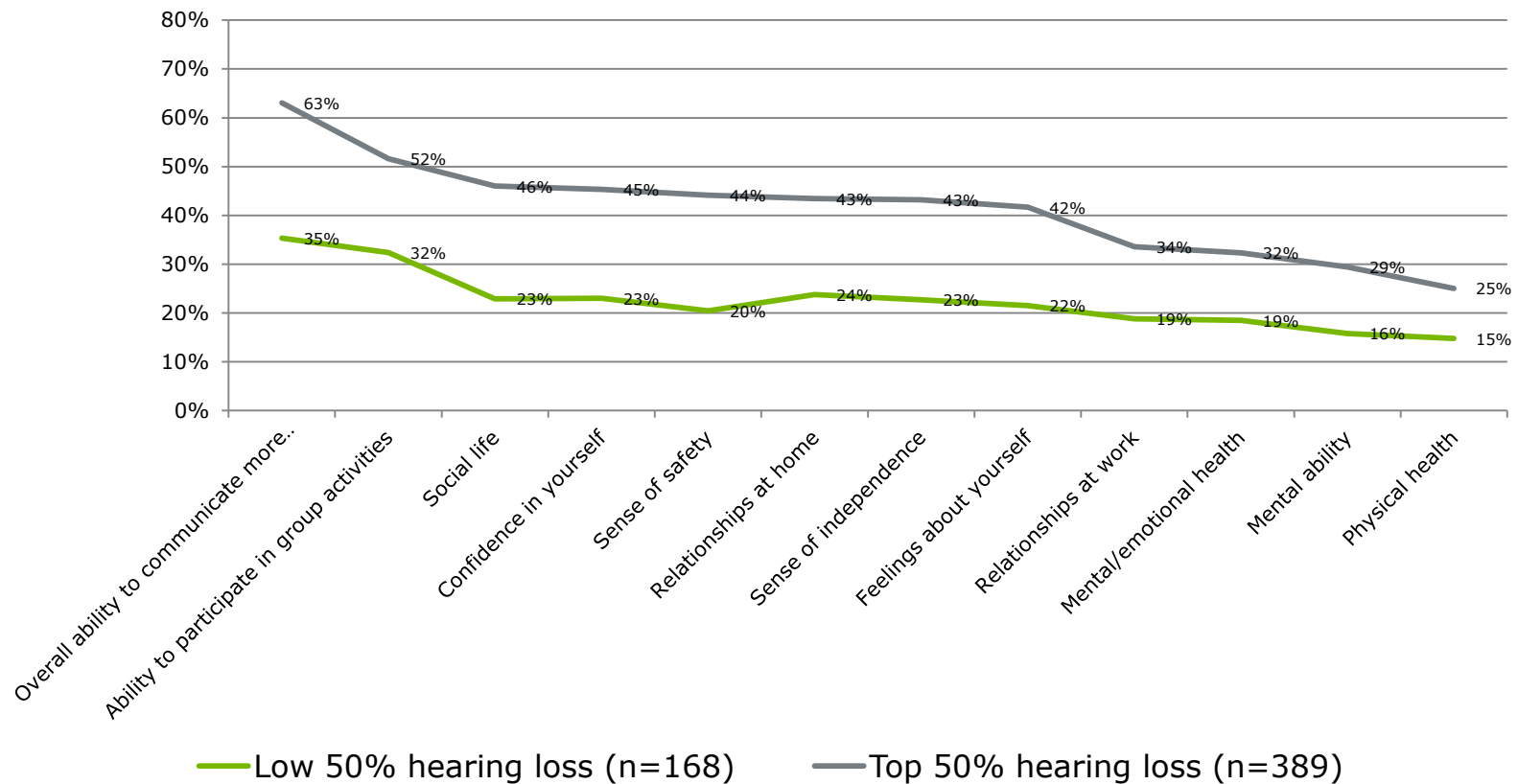


HA-owner, n=605



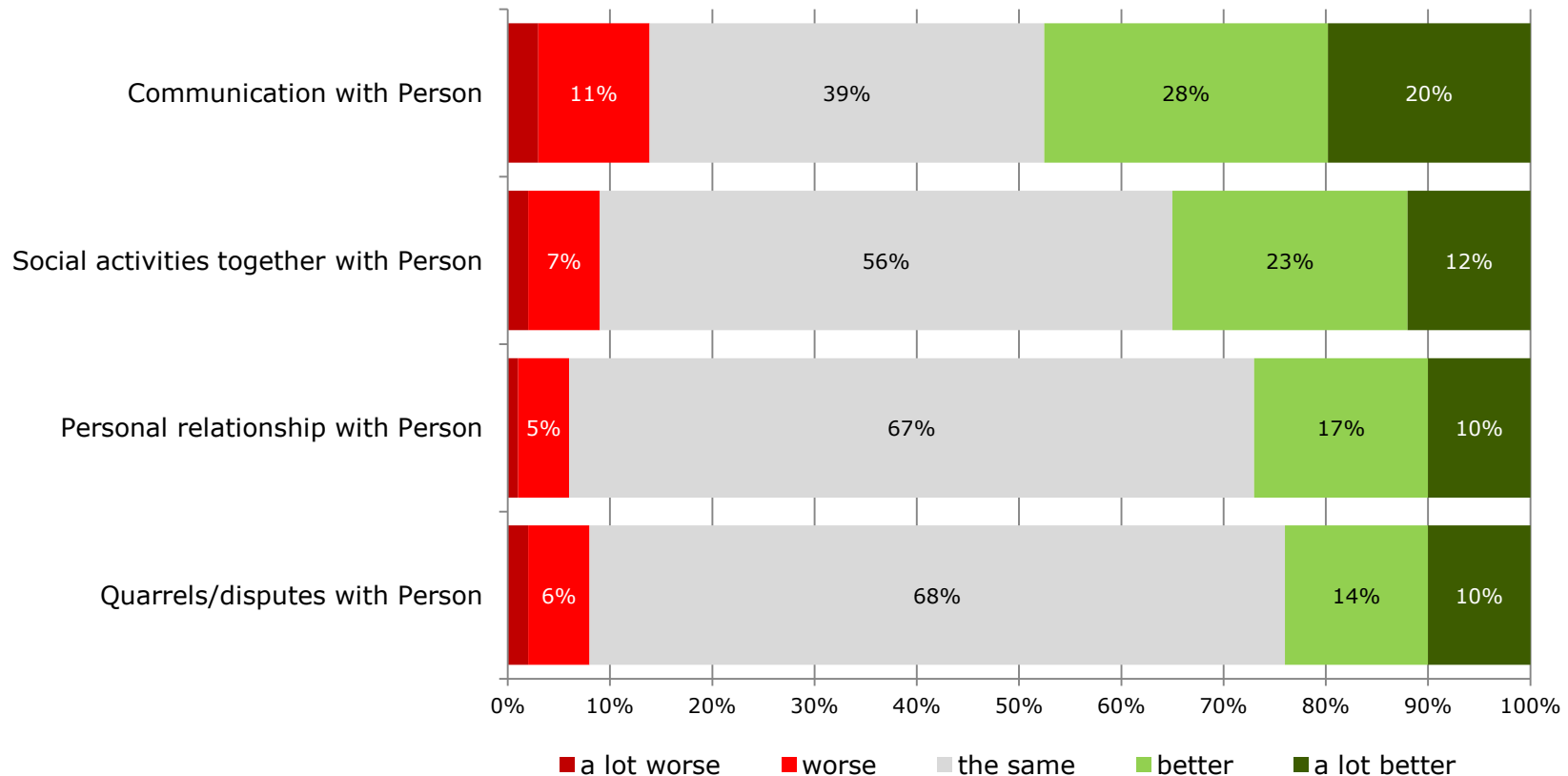
# Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in most aspects

**% of HA owners feeling better/a lot better**



# Even for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids

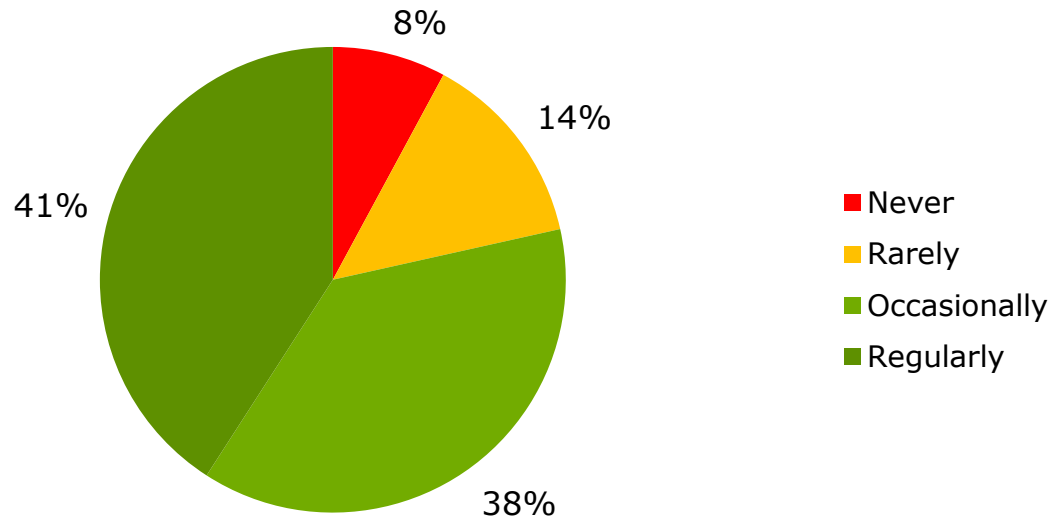
How did the following aspects change since person X is wearing hearing aids?



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?



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## **4. Analysis of hearing impaired non-owners**

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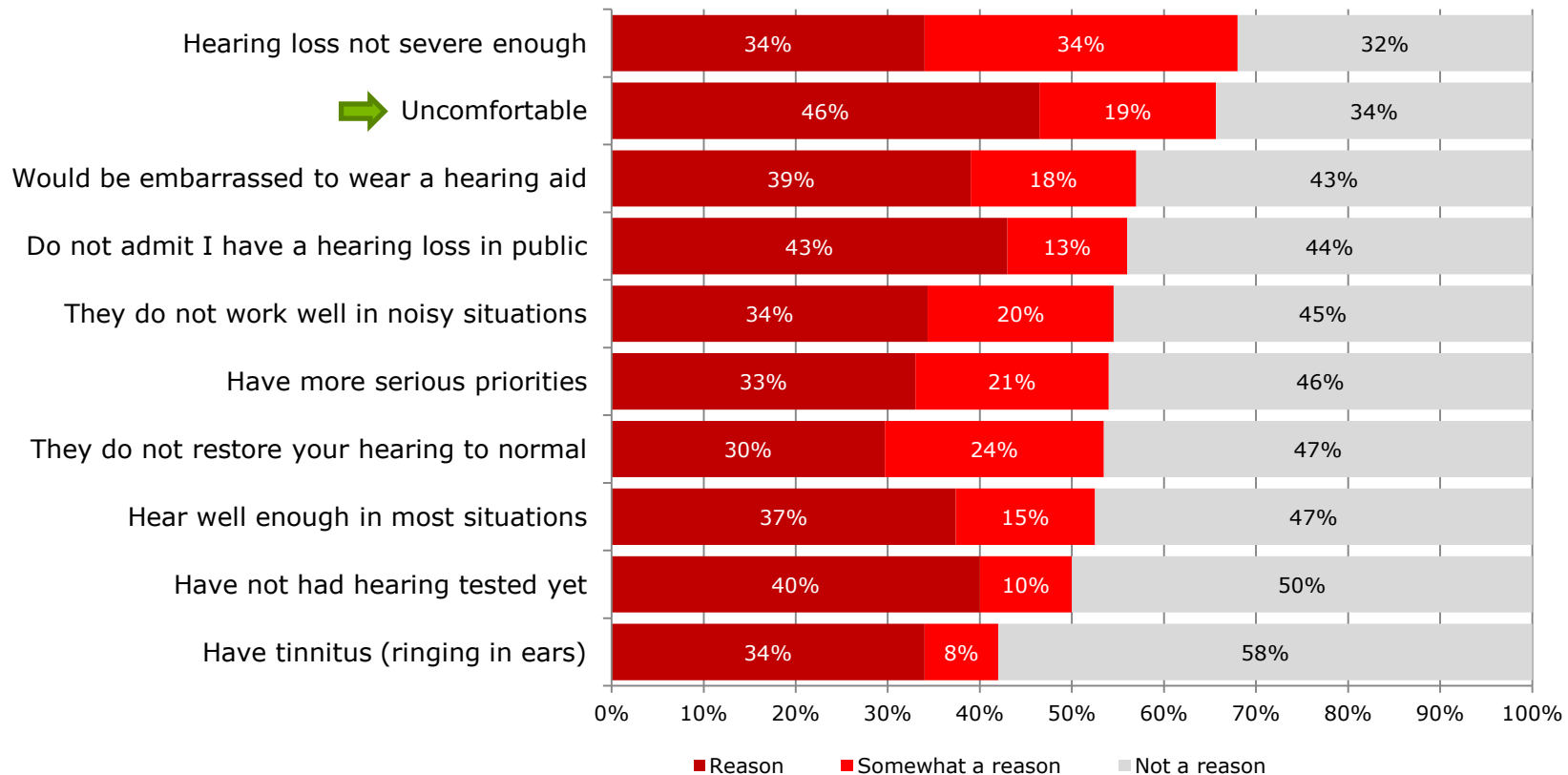
## Reasons for not having hearing aids and why some people can consider hearing aids as uncomfortable

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

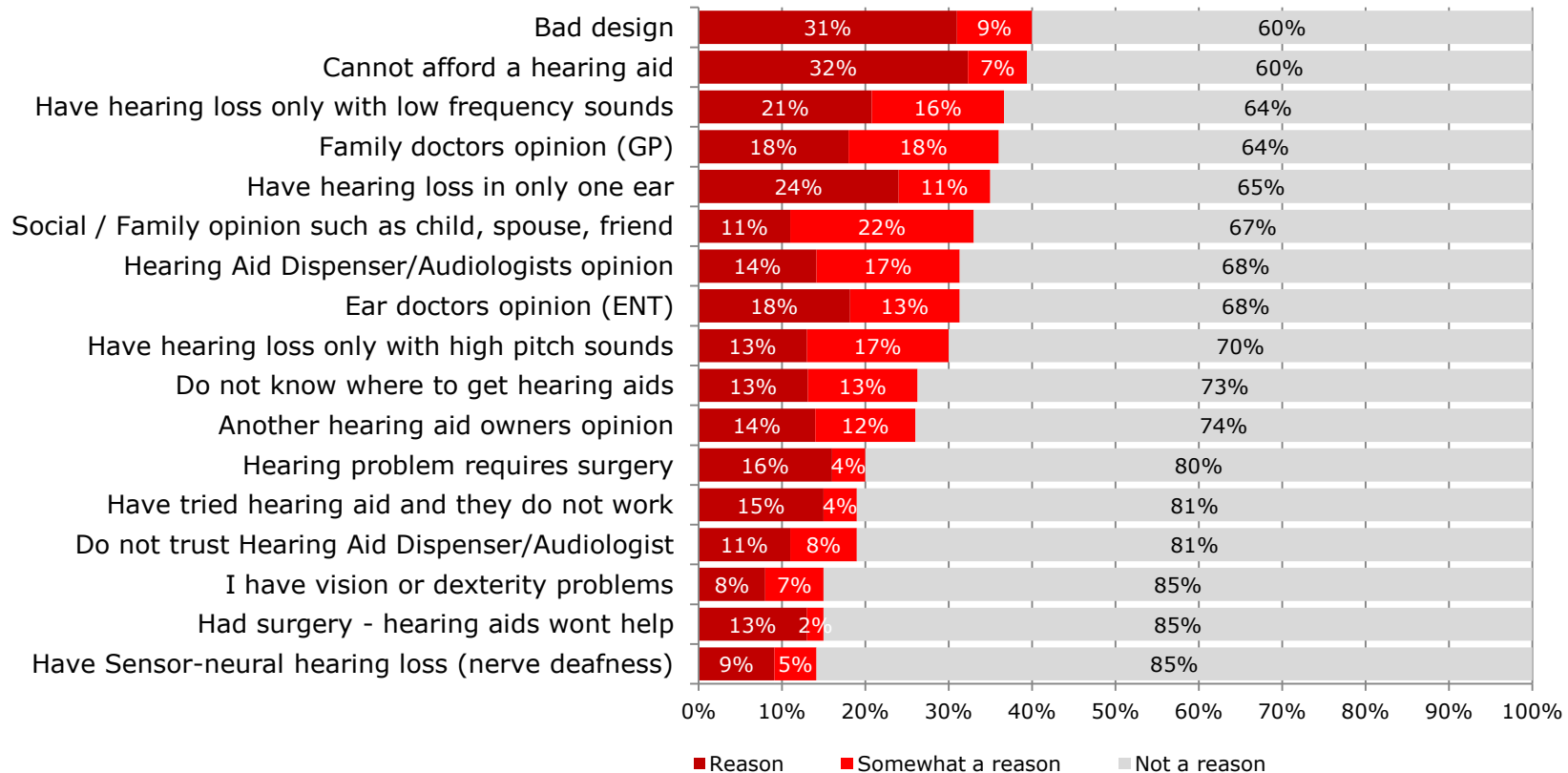
## Hearing loss characteristics: Owners compared to non-owners

	% HA Owner (n=605)	%HA-Non- owner Low 50% HL (n=389)	%HA-Non- owner Top 50% HL (n=201)
<b>Ears impaired</b>			
Unilateral loss	22%	45%	35%
Bilateral loss	78%	55%	65%
<b>Perceived loss</b>		More similar hearing loss- structure	
Mild	13%	54%	14%
Moderate	56%	42%	65%
Severe	26%	3%	17%
Profound	6%	1%	4%

# Top 10 reasons for not having a hearing aid (I/II)

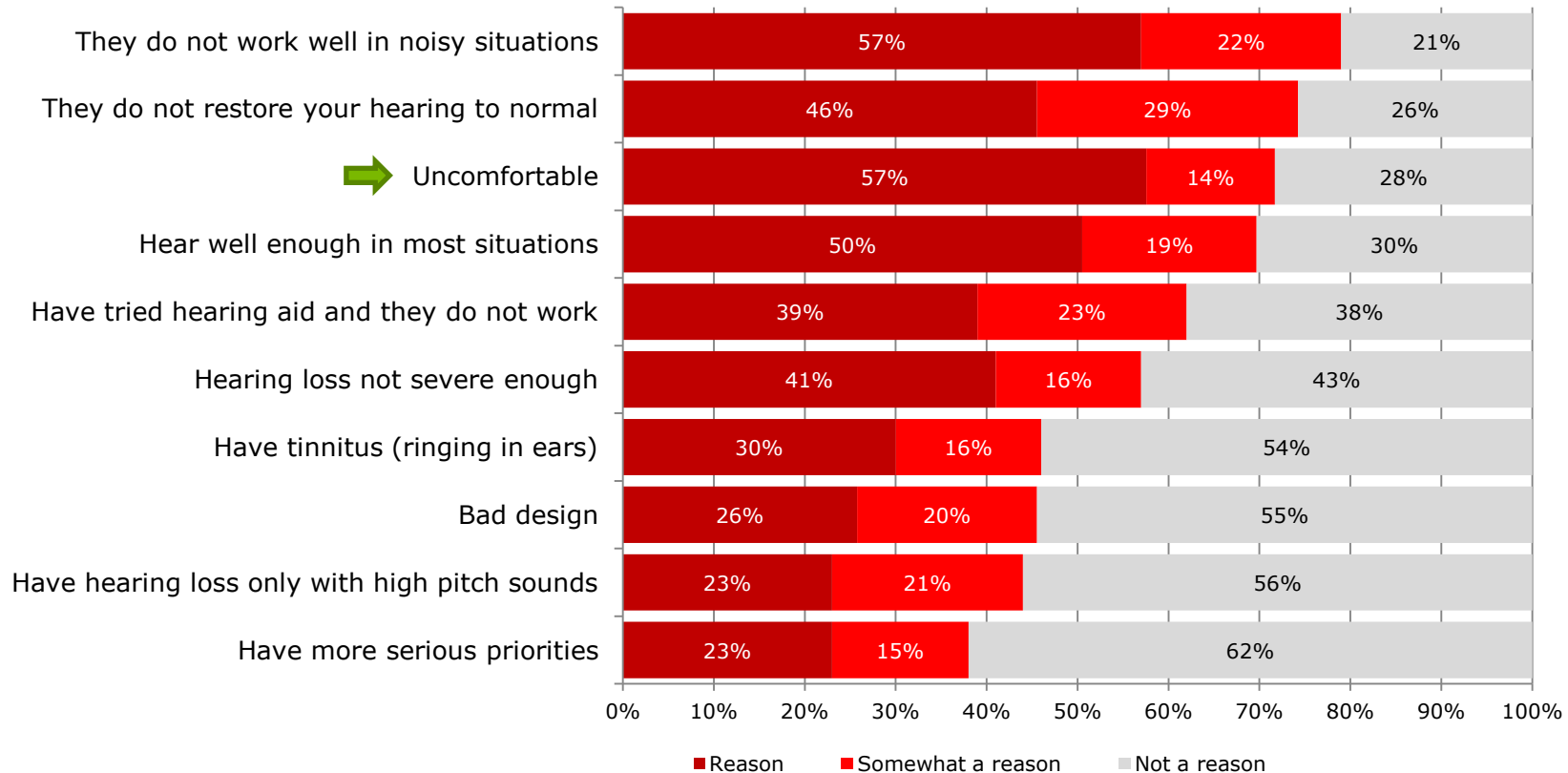


# Less important reasons for not having a hearing aid (II/II)





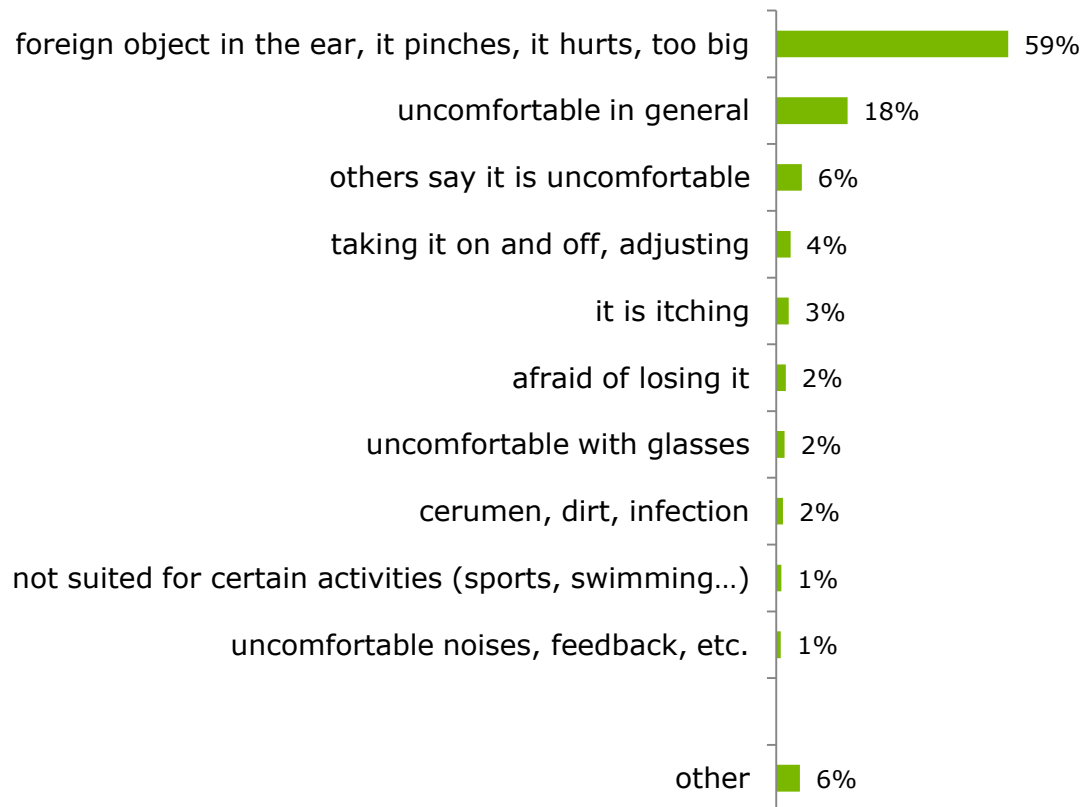
# Top 10 reasons for HA owners NOT using them



Owners who don't use, n=68

# 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.**



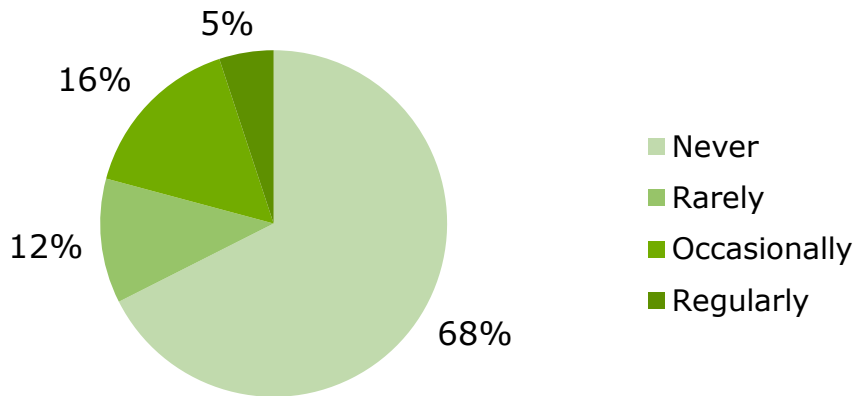
Base: n=315

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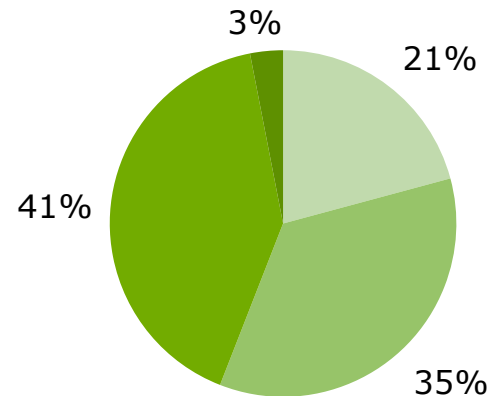
Social rejection because of hearing loss  
compared to the acceptance of hearing aids

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?**



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



Base: N=605

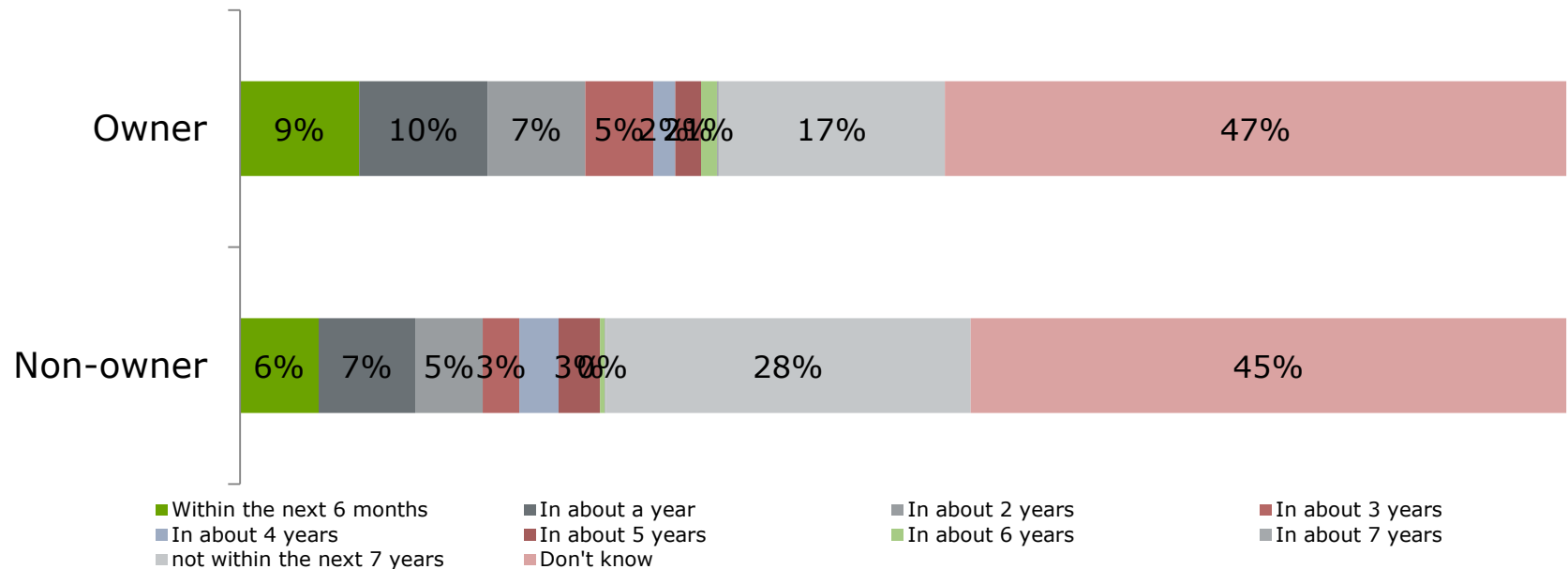
Base: Top 50% hearing loss, no hearing aid N=201

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# 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

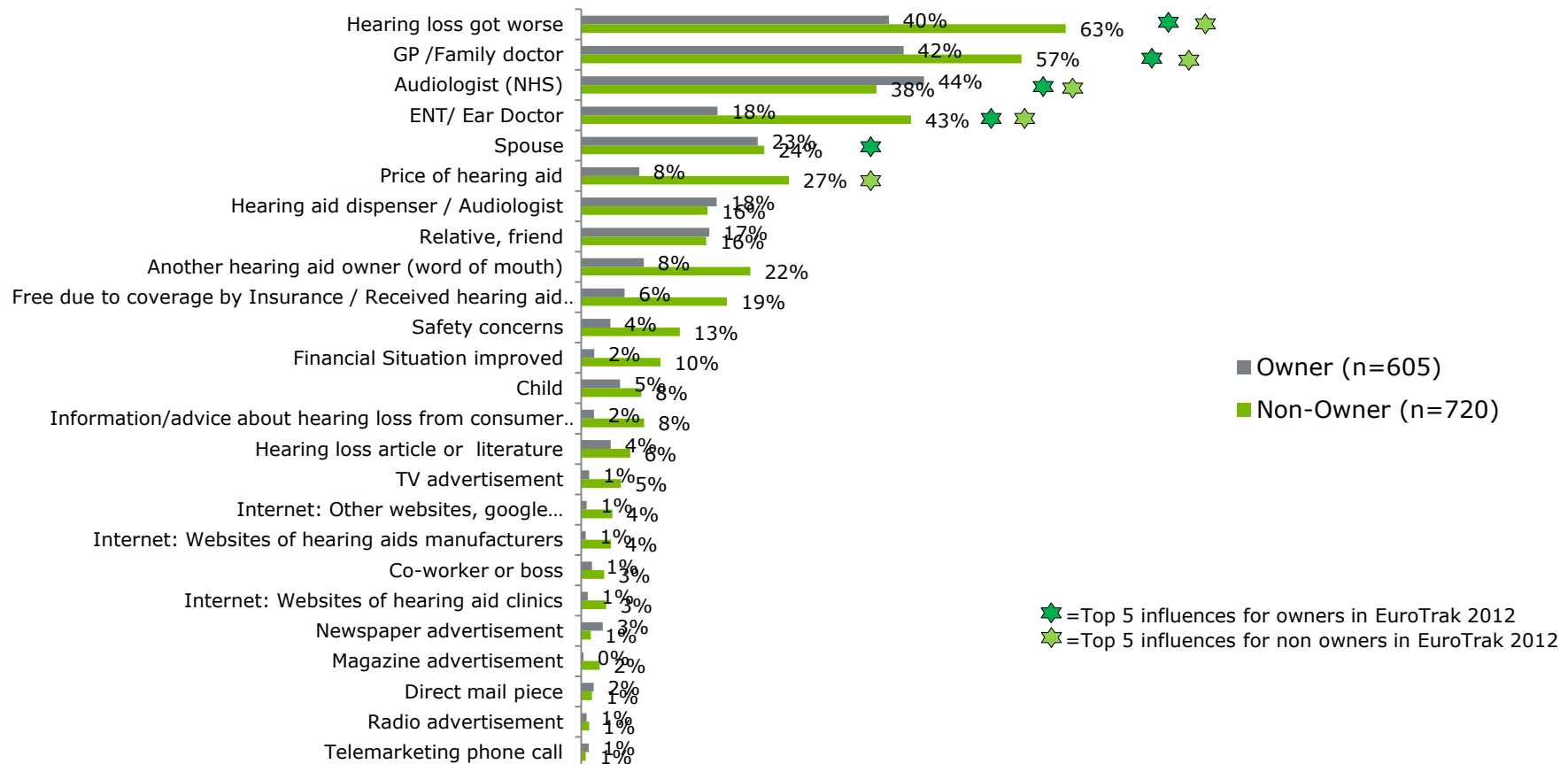
**Buying intention hearing impaired in %**



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

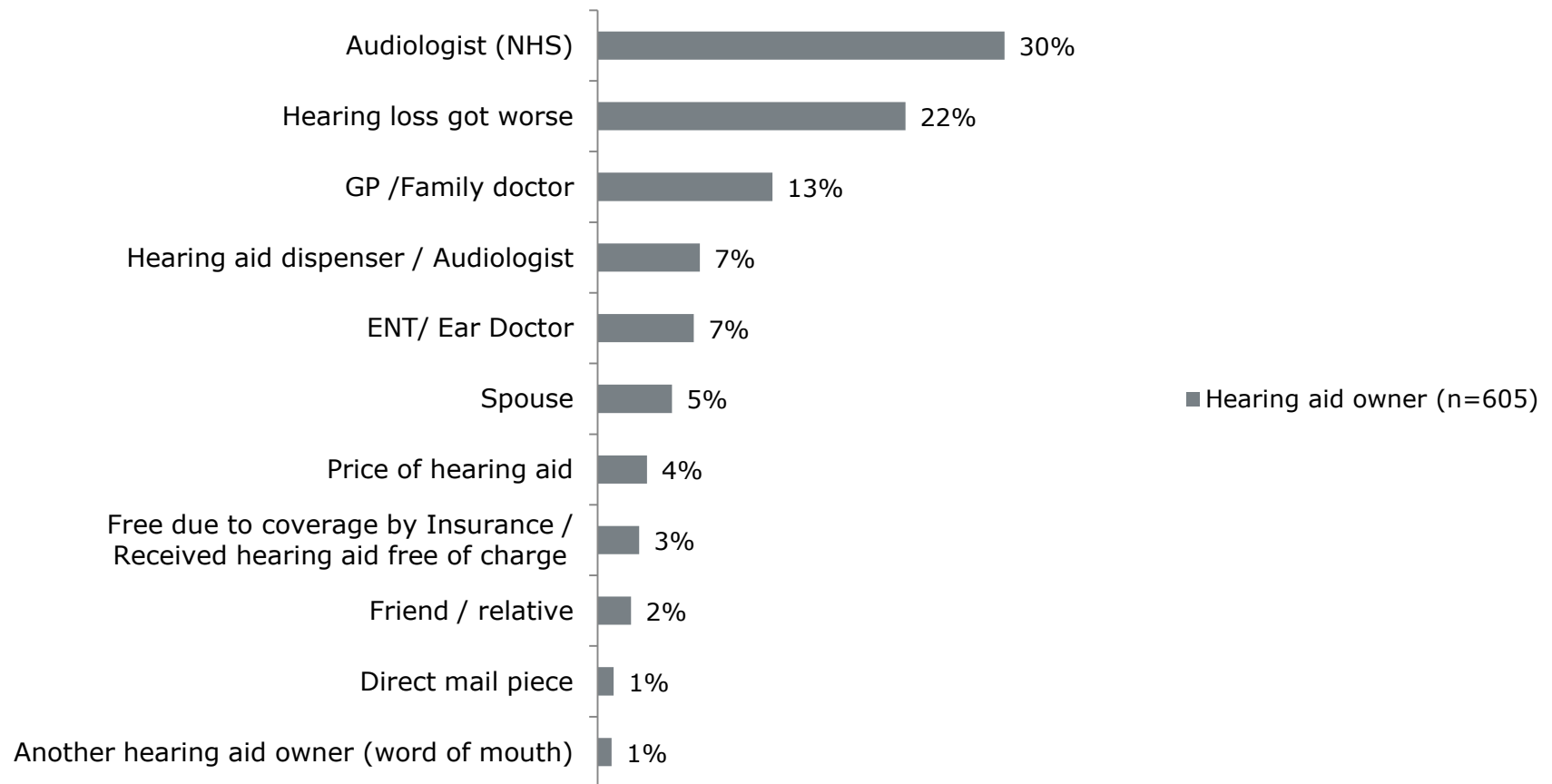
**Non-owner:** Think about the option to obtain / purchase a hearing aid. What do you think would influence you to obtain / purchase a hearing aid ?

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



# 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)?







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# APPENDIX

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# 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  $\pm 3.1$  around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

Sample size	Random sample error	
	Real value is within interval:	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
50	$\pm 13.9$	$\pm 9.9$
100	$\pm 9.8$	$\pm 7.0$
250	$\pm 6.2$	$\pm 4.4$
500	$\pm 4.4$	<b><math>\pm 3.1</math></b>
1000	$\pm 3.1$	$\pm 2.2$
5'000	$\pm 1.4$	$\pm 1.0$
10'000	$\pm 1.0$	$\pm 0.7$

# Demographics (1) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%\*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Gender</b>						
Male	7195	10.5%	37.8%	49.3%	58.2%	48.0%
Female	7278	8.9%	47.8%	50.7%	41.8%	52.0%
<b>Age recoded</b>						
1 - 14	2507	2.1%	35.5%	18.8%	4.1%	3.1%
15 - 24	1830	3.7%	23.6%	13.5%	6.3%	2.6%
25 - 34	1962	3.6%	41.9%	14.5%	5.1%	5.0%
35 - 44	1860	4.7%	20.1%	13.6%	8.7%	3.0%
45 - 54	2114	7.8%	35.1%	14.9%	13.2%	9.7%
55 - 64	1663	12.9%	32.7%	11.1%	17.8%	11.8%
65 - 74	1379	20.4%	44.2%	8.4%	19.4%	20.8%
74+	1157	40.4%	56.1%	5.3%	25.3%	44.0%
<b>Type of household</b>						
single household	1467	19.3%	49.9%	9.1%	17.5%	23.7%
Couple, no kids	3823	14.2%	45.0%	25.1%	36.7%	40.9%
Couple with kid(s)	6624	5.2%	31.9%	48.0%	29.1%	18.5%
Single mom/dad with kid(s)	987	6.3%	40.5%	7.1%	4.5%	4.2%
Retirement home, hospital etc.	110	41.6%	50.0%	0.5%	2.8%	3.8%
Other	1462	8.8%	41.4%	10.2%	9.3%	8.9%

# Demographics (2) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%\*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)		No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Status</b>							
The head of the household (alone or together with someone)	6954	14.3%	42.6%		45.9%	72.4%	73.5%
The spouse of the head of the household	2452	8.6%	43.2%		17.2%	15.3%	15.9%
Daughter/son of head of household	4069	2.1%	32.9%		30.6%	7.5%	5.0%
Other Person	881	8.0%	45.7%		6.2%	4.9%	5.6%
<b>Employment</b>							
Full time employed	5034	6.5%	28.8%		44.9%	30.0%	16.3%
Part time employed	1567	6.6%	30.3%		13.9%	9.4%	5.5%
Unemployed / not working	1334	8.7%	34.2%		11.6%	9.9%	6.9%
Retired under a disability pension scheme (fully or partly)	348	22.1%	48.2%		2.6%	5.1%	6.4%
Early retired under an early retirement benefit scheme	494	21.1%	46.8%		3.7%	7.2%	8.5%
Retired (at the official retirement age)	2112	28.6%	53.0%		14.4%	36.6%	55.6%
Student / pupil / in training	960	2.0%	25.7%		9.0%	1.9%	0.9%
<b>Education</b>							
Secondary/Grammar School	2428	17.1%	47.0%		19.2%	28.5%	33.9%
„O“ Levels	1782	11.9%	39.3%		15.0%	16.6%	14.5%
„A“ Levels	1750	7.0%	34.0%		15.5%	10.5%	7.2%
Ordinary National Certificate	520	14.1%	46.7%		4.3%	5.1%	6.0%
Higher National Certificate	685	9.0%	41.4%		5.9%	4.7%	4.4%
Technical High School	548	12.7%	39.8%		4.6%	5.4%	4.8%
University	3253	7.4%	41.4%		28.7%	18.2%	17.3%
Other	881	17.6%	44.2%		6.9%	11.2%	11.9%