Results

EuroTrak Germany 2015

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

1. Introduction

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

- Sample sizes Germany 2015:
  - Representative sample (sample 1): n=13'775 people
  - Hearing impaired (sample 2): n=1’304 people
  - Hearing impaired non-owners: n= 799 people with hearing loss (HL)
  - HA owners: n= 505 people with hearing aid (HA)

- EuroTrak Germany 2015 is part of the EuroTrak studies:
Summary
2. Market overview

• Stated hearing loss prevalence
  – Total: 12.1%, 18+: 13.9% (2012: 12.5%, 18+: 14.3%).
  – Binaural hearing loss: HA owners: 81%, HA non-owners: 63%.
  – Hearing Tests: 45% (2012: 47%) had a hearing test in the last 5 years, most tests done by ENTs.

• Hearing aid adoption rate (HA penetration)
  – Total: 34.9% (2012: 34.0%).
  – Total age group 18+: 35.0% (2012: 34.1%).
  – 75% of HA owners have binaural treatment.

• The route to the hearing aid
  – 79% 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=36% / 2012: 40%).
  – 67% (2012:73%) of the GP consultations referred to an ENT. 12% (2012: 11%) recommended no action.
  – 35% of ENT consultations referred to a audiologist, 39% (2012: 44%) 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**
  - 92% (2012: 93%) of all HA owners asked some kind of 3rd party reimbursement.
  - 45% of the currently owned HAs were bought in the last two years (EuroTrak 2012: 49%)
  - The average age of the currently owned HAs is 2.9 years (2012: 3.0 years).
  - The median age of hearing aids before replacement is 5 years.
  - On average, HAs are worn 8.7 hours a day (2012: 8.0).
  - 38% of today’s hearing aid owners are aware of their hearing aid brand, 38% would preferably choose the same brand if they would plan to obtain new hearing aids (52% are indifferent).
  - The ownership of accessories is very low in Germany.
  - 10% of hearing aid owners know what Telecoil is but only 5% have used it – mainly at home. More than half of those who use it are satisfied.

- **Importance of listening situations and satisfaction with HAs**
  - 87% of the hearing aid owners say their hearing aid works better than or as expected
  - 77% (2012:77%) of the HA owners are satisfied with their HAs.
  - The more hours worn per day, the higher the satisfaction.
  - Satisfaction with newer hearing aids is higher than with older hearing aids.
  - Talking at home with family members, conversations with 1 person and talking on a phone 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 sense of safety.
  - 98% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

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Summary

4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
  - Only 39% (2012: 33%) of the hearing impaired without hearing aids think that a third party would pay any part of hearing aids.
  - The main reasons for not using hearing aids are that people say “they hear well enough”, “hearing loss is not severe enough” and that they are uncomfortable.
  - 3% who own HAs don’t use them at all (0 hour); 10% use them less than one hour/day (0-1 hour).

- Social rejection, buying intentions and triggers to buy
  - 89% 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 trigger to buy a hearing aid is worsening hearing loss and the ENT followed by “Akustiker” and spouse. Insurance coverage/price of hearing aids is much more relevant for the non owners.
  - 19% (2012: 13%) of non-owners intend to get a hearing aid within the next year.
Results

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Detailed Results: Roadmap

New topics for EuroTrak 2015 are highlighted in red

1. Introduction
   - Organisation of EuroTrak 2015
   - Recruitment process: In search of hearing impaired people

2. Market overview
   - Prevalence of hearing loss and hearing aid adoption rate
   - Hearing tests and where hearing is tested
   - The route to the hearing aid: Sources of information and drop-out rates
   - Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality

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

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

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

Organisation

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

Use of the data

- The principal as well as the EHIMA companies may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.

- The raw dataset remains at Anovum. If the principal or the EHIMA companies use the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
  “Source: Anovum – EuroTrak – Germany/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=13’775 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=799 hearing aid owners and n=505 hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age
Hearing loss prevalence Germany

% hearing loss prevalence

- Total:
  - EuroTrak 2015: 12.1%
  - EuroTrak 2012: 12.5%
  - EuroTrak 2009: 13.1%

- Total 18+:
  - EuroTrak 2015: 13.9%
  - EuroTrak 2012: 14.3%
  - EuroTrak 2009: 15.1%

- 74+:
  - EuroTrak 2015: 36.9%
  - EuroTrak 2012: 37.0%
  - EuroTrak 2009: 38.8%

- 65-74:
  - EuroTrak 2015: 22.3%
  - EuroTrak 2012: 23.6%
  - EuroTrak 2009: 24.2%

- 55-64:
  - EuroTrak 2015: 15.0%
  - EuroTrak 2012: 15.8%
  - EuroTrak 2009: 16.7%

- 45-54:
  - EuroTrak 2015: 9.7%
  - EuroTrak 2012: 10.9%
  - EuroTrak 2009: 11.7%

- 35-44:
  - EuroTrak 2015: 7.2%
  - EuroTrak 2012: 7.7%
  - EuroTrak 2009: 8.9%

- 25-34:
  - EuroTrak 2015: 5.3%
  - EuroTrak 2012: 5.6%
  - EuroTrak 2009: 5.1%

- 15-24:
  - EuroTrak 2015: 3.7%
  - EuroTrak 2012: 3.6%
  - EuroTrak 2009: 3.1%

- <=14:
  - EuroTrak 2015: 2.6%
  - EuroTrak 2012: 2.7%
  - EuroTrak 2009: 3.1%

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Overview hearing loss prevalence and hearing aid adoption

<table>
<thead>
<tr>
<th>Year</th>
<th>Hearing impaired (stated)</th>
<th>Adoption (% of population)</th>
<th>Adoption (% of stated impaired)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EuroTrak 2015</td>
<td>12,1%</td>
<td>4,2%</td>
<td></td>
</tr>
<tr>
<td>EuroTrak 2012</td>
<td>12,5%</td>
<td>4,2%</td>
<td></td>
</tr>
<tr>
<td>EuroTrak 2009</td>
<td>13,1%</td>
<td>4,2%</td>
<td></td>
</tr>
</tbody>
</table>

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Hearing aid adoption rate Germany:
35% of hearing impaired have hearing aid(s), 75% of them have binaural treatment
The more severe the hearing loss, the higher the adoption rate

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

People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).
## Hearing loss characteristics: Owners compared to non-owners

<table>
<thead>
<tr>
<th></th>
<th>HA-Non-owner</th>
<th>HA Owner</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2015: n=799</td>
<td>2015: n=505</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(2012: n= 864/</td>
<td>(2012: n=500/</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2009: n= 805)</td>
<td>2009: n= 503)</td>
<td></td>
</tr>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(stated)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>37% (42%/43%)</td>
<td>19% (22%/25%)</td>
<td>23% (23%/22%)</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>63% (58%/57%)</td>
<td>81% (78%/75%)</td>
<td>43% (43%/39%)</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild⁺</td>
<td>49% (42%/31%)</td>
<td>10% (10%/6%)</td>
<td>10% (11% /8%)</td>
</tr>
<tr>
<td>Moderate⁺</td>
<td>43% (43%/50%)</td>
<td>54% (45%/31%)</td>
<td>41% (36%/22%)</td>
</tr>
<tr>
<td>Severe⁺</td>
<td>5% (12%/15%)</td>
<td>26% (29%/43%)</td>
<td>72% (62%/62%)*</td>
</tr>
<tr>
<td>Profound⁺</td>
<td>2% (3%/4%)</td>
<td>10% (16%/21%)</td>
<td></td>
</tr>
</tbody>
</table>

*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: 45% (2012: 47%) had their hearing tested in the last 5 years – most tests are done by ENT’s

Have you ever taken a hearing test?

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

Where/how was your hearing tested?

- Ear doctor (ENT) 60%
- Family doctor 19%
- "Hörgeräteakustiker" (Hearing Aid Dispenser/Audiologist) 17%
- Online test 1%
- Test on a smartphone App 1%
- Other 10%
- Don't know 2%

Base=4’602
The route to the hearing aid: Sources of information and drop-out rates
Doctors and “Hörgeräteakustiker” are the most important sources of information and therefore the major gatekeepers – followed by other people with hearing aids.

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

- Family doctor, ear doctor (ENT), "Hörgeräteakustiker" - 76%
- Conversations with friends, relatives already fitted with a hearing aid - 21%
- Internet research: combined (all three) - 15%
- Internet research: websites of hearing aids manufacturers - 9%
- Articles in magazines or newspapers - 9%
- Internet research: websites of hearing aid clinics - 7%
- Internet research: other websites, google… - 5%
- Print ads received in your mailbox - 4%
- I did not gather information about hearing aids - 34%
- Other - 2%

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Of those who discussed the hearing loss with a doctor, about 2/3 talked to an ENT first and the other 1/3 talked to the family doctor first.

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

- Total n= 985
- Hearing aid (n=458)
- Hearing loss but no hearing aid (n=527)

- 64% Ear doctor (ENT specialist)
- 36% Your family doctor

- 58% Ear doctor (ENT specialist)
- 42% Your family doctor

- 68% Ear doctor (ENT specialist)
- 32% Your family doctor
The route to the hearing aid: Compared to 2012 drop out 2 was reduced slightly

<table>
<thead>
<tr>
<th>Step</th>
<th>2012 (%)</th>
<th>Drop Out (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All hearing impaired</td>
<td>100%</td>
<td></td>
</tr>
<tr>
<td>Discussed hearing with ear doctor and/or family doctor</td>
<td>79%</td>
<td>21%</td>
</tr>
<tr>
<td>Positive medical advice (Ear doctor or family doctor recommend further action)</td>
<td>50%</td>
<td>36%</td>
</tr>
<tr>
<td>Discussed hearing loss with HA dispenser/audiologist</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>Positive advice HA dispenser/audiologist</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>Bought hearing aid</td>
<td>35%</td>
<td></td>
</tr>
</tbody>
</table>

Base: n=1’304
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>Category</th>
<th>EuroTrak 2015</th>
<th>EuroTrak 2012</th>
<th>EuroTrak 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
<td>48%</td>
<td>56%</td>
<td>63%</td>
</tr>
<tr>
<td>HA owner</td>
<td>65%</td>
<td>69%</td>
<td>80%</td>
</tr>
<tr>
<td>Hearing impaired non-owners</td>
<td>39%</td>
<td>50%</td>
<td>56%</td>
</tr>
</tbody>
</table>

**What did he/she recommend?**

**HA owner (Base: 286)**
- Referred to a hearing aid dispenser / audiologist (Akustiker): 38%
- Referred to an ear doctor (ENT): 77%
- Recommended to get a hearing aid: 17%
- Recommended no further action: 2%

**Impaired non-owner (Base: 323)**
- Referred to a hearing aid dispenser / audiologist (Akustiker): 20%
- Referred to an ear doctor (ENT): 59%
- Recommended to get a hearing aid: 6%
- Recommended no further action: 20%

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

% Discussed with ENT

What did he/she recommend?

HA owner (Base: 405)
- Did prescribe a hearing aid: 69%
- Referred to a hearing aid dispenser / audiologist (Akustiker): 46%
- Recommended no further action: 4%

Impaired non-owner (Base: 506)
- Did prescribe a hearing aid: 9%
- Referred to a hearing aid dispenser / audiologist (Akustiker): 25%
- Recommended no further action: 67%
The route to the hearing aid: Akustiker
Have you discussed your hearing problem with a Hearing Aid Dispenser/Audiologist?

% Discussed with Audiologist

- Total hearing impaired:
  - EuroTrak 2015: 45%
  - EuroTrak 2012: 42%
  - EuroTrak 2009: 40%

- HA owner:
  - Recommended to get a hearing aid: 83%
  - Recommended not to get a hearing aid: 17%

- Impaired non-owner (Base: 164):
  - Recommended to get a hearing aid: 69%
  - Recommended not to get a hearing aid: 31%

What did he/she recommend?

HA owner (Base: 409)

- Recommended to get a hearing aid: 99%
- Recommended not to get a hearing aid: 1%

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Recommendations by profession

- **GP** (N=609): 11% referred to an ear doctor (ENT), 12% referred to a hearing aid dispenser / audiologist (Akustiker), 29% recommended to get a hearing aid, 73% recommended no further action.
- **ENT** (N=911): 44% referred to an ear doctor (ENT), 35% referred to a hearing aid dispenser / audiologist (Akustiker), 39% recommended to get a hearing aid, 22% recommended no further action.
- **Akustiker** (N=573): 88% referred to a hearing aid dispenser / audiologist, 12% recommended no further action.

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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: 95% 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?

- 56% Of significant use
- 39% Of some use
- 5% Of no use

Base: N=145
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 aid n=398 / Hearing loss, no hearing aid =612
**General health problems:** Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*).

**Depression symptoms:** PHQ-2 Screening:
In the last 2 weeks:
- Little interest or pleasure
- Feeling down, depressed, hopeless

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

*Construction of 6-groups: A factor analysis was performed to identify one factor “degree of hearing loss”. The following questions were included in the factor:
- Number of ears impaired (one or two)
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- Scores on 6 APHAB-EC – like questions (Scaled 1-5)

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**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.

### In the evenings I often feel physically exhausted

<table>
<thead>
<tr>
<th></th>
<th>Hearing aid</th>
<th>Top 50% hearing loss, no hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disagree strongly</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Rather disagree</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Neutral</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>Rather agree</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>8%</td>
<td>19%</td>
</tr>
</tbody>
</table>

**Base**: Top 50% n=134 / hearing aid n=367

**In the evenings I often feel mentally exhausted**

<table>
<thead>
<tr>
<th></th>
<th>Hearing aid</th>
<th>Top 50% hearing loss, no hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
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<td>12%</td>
</tr>
<tr>
<td>Neutral</td>
<td>30%</td>
<td>23%</td>
</tr>
<tr>
<td>Rather agree</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>Strongly agree</td>
<td>7%</td>
<td>18%</td>
</tr>
</tbody>
</table>

**Base**: Top 50% n=134 / hearing aid n=367

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*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=134):
  - No: 53%
  - Yes: 47%

- Hearing aid (n=367):
  - No: 48%
  - Yes: 52%

Benchmarks (% satisfied with quality of sleep):
- 31% of dissatisfied hearing aid owners (n=40)
- 55% of satisfied hearing aid owners (n=280)
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></td>
<td></td>
<td>2015</td>
</tr>
<tr>
<td>Profound+</td>
<td>(5%)</td>
<td>2%</td>
</tr>
<tr>
<td>Severe+</td>
<td>(13%)</td>
<td>3%</td>
</tr>
<tr>
<td>Moderate+</td>
<td>(47%)</td>
<td>28%</td>
</tr>
<tr>
<td>Mild+</td>
<td>(35%)</td>
<td>32%</td>
</tr>
</tbody>
</table>

Base: n=1’304
Sums can differ from 100% due to rounding
* combined "severe" and "profound" because n is too small

+ 2009: Schwach- Mässig-Stark-Sehr stark
2012/15: Leicht-Mittel-Schwer-Hochgradig
66% of the currently owned HAs were fitted in 2012 or later

**Year of purchase**

- **2015 (n=497)**
  - 2014/2015: 26%
  - 2013: 45%
  - 2012: 66%
  - 2011: 75%
  - 2010: 85%
  - 2009: 91%
  - 2008: 93%
  - 2007: 94%
  - 2006: 94%
  - 2005: 96%
  - 2004: 97%
  - 2003: 100%
  - 2002 or earlier: 100%

- **2012 (n=500)**
  - 2014/2015: 27%
  - 2013: 49%
  - 2012: 61%
  - 2011: 68%
  - 2010: 53%
  - 2009: 64%
  - 2008: 71%
  - 2007: 77%
  - 2006: 84%
  - 2005: 89%
  - 2004 or earlier: 100%

- **2009 (n=503)**
  - 2014/2015: 10%
  - 2013: 32%
  - 2012: 68%
  - 2011: 78%
  - 2010: 83%
  - 2009: 86%
  - 2008: 89%
  - 2007 or earlier: 97%

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

- **2015:** 2.9 years
- **2012:** 3.0 years
- **2009:** 3.4 years
On average 2-3 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: 62%
- 63% Yes
- 37% No

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

- 21% 1-3 years
- 52% 4-6 years
- 20% 7-10 years
- 7% 11 years or longer

Base: n=166

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

- 26% 1 year
- 28% 2 years
- 23% 3 years
- 16% 4-6 years
- 7% more than 6 years

Base: n=330

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Monaural-binaural treatment by purchase date

<table>
<thead>
<tr>
<th>Year of purchase</th>
<th>Percentage of Binaural Hearing Aids</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013/2014 (n=237 EuroTrak 2015)</td>
<td>77%</td>
</tr>
<tr>
<td>2012/2011 (n=131 EuroTrak 2012)</td>
<td>76%</td>
</tr>
<tr>
<td>2010 (n=105 EuroTrak 2012)</td>
<td>63%</td>
</tr>
<tr>
<td>2009 or earlier (n=589, EuroTrak 2009)</td>
<td>60%</td>
</tr>
</tbody>
</table>
While hearing impaired without hearing aids tend not to know whether a third party would pay any part of hearing aids – more than 90% of the hearing aid owners received some kind of 3rd party reimbursement.

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

- Yes, completely (2012: 27%)
- Yes, partly (2012: 66%)
- No (2012: 6%)
- don't know (2012: 1%)

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

- Yes (2012: 33%)
- No (2012: 14%)
- don't know (2012: 53%)
On average, HAs are worn 8.7 hours a day
38% of today’s hearing aid owners are aware of their hearing aid brand

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

- Yes, I know it by heart: 38%
- No, but I could find out: 27%
- No, and can't find out: 35%

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

- Preferably from the same brand you currently own: 38%
- Preferably from a different brand than you currently own: 52%
- Indifferent, could be any brand: 10%

Base: N=505 / 395
75% of the currently owned HAs either had no repair need or only once

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

<table>
<thead>
<tr>
<th>Year</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
<th>70%</th>
<th>80%</th>
<th>90%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>53%</td>
<td>22%</td>
<td>18%</td>
<td>5%</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>43%</td>
<td>24%</td>
<td>27%</td>
<td>2%</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>46%</td>
<td>23%</td>
<td>21%</td>
<td>8%</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- Combined device - audio streamer and remote control in one device
  - Never heard of this before: 44%
  - Heard of this before but don't own one: 47%
  - I own one: 3%

- Additional microphone for conversations with one person, conversations in a group etc.
  - Never heard of this before: 53%
  - Heard of this before but don't own one: 50%
  - I own one: 3%

- Phone clip, plugged into the mobile phone to stream calls to the hearing aid
  - Never heard of this before: 38%
  - Heard of this before but don't own one: 39%
  - I own one: 4%

- TV Box connected to the TV set to stream audio to your hearing aid
  - Never heard of this before: 43%
  - Heard of this before but don't own one: 45%
  - I own one: 3%

- Audio streamer to connect my hearing aids to other devices like cell phones, mp3 players, TV sets, etc.
  - Never heard of this before: 58%
  - Heard of this before but don't own one: 58%
  - I own one: 3%
10% of hearing aid owners know what Telecoil is, 5% have used it – mainly at home. More than 50% of those who use it are satisfied.

Have you seen this logo before?
- Yes, and I know what it stands for: 10%
- Yes, but I don’t know what it stands for: 31%
- No, have never seen this: 58%

Are your hearing aids equipped with Telecoil?
- Yes, and I have already used Telecoil: 5%
- Yes, but have never used it: 9%
- No: 45%
- I don’t know: 42%

On what type of venues have you used hearing aids in a hearing loop (Telecoil)?
- Home: 58%
- Theater, auditorium: 25%
- Church: 16%
- School, university: 14%
- Drive thru, ticket window, bank counter: 8%
- Airport, train station: 8%
- Court room: 6%
- Conference room: 4%

How satisfied are you with the use of Telecoil overall?
- Very dissatisfied: 6%
- Dissatisfied: 19%
- Somewhat dissatisfied: 20%
- Neutral: 13%
- Somewhat satisfied: 37%
- Satisfied: 6%

HA-owner, n=505

HA-owner, who have used Telecoil, n=28 (low sample!)
Satisfaction with hearing aids and drivers
87% 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?

- Hearing aids work better than I expected: 28%
- Hearing aids work as I expected: 59%
- Hearing aids work worse than I expected: 13%

Base: N=505
Overall satisfaction is stable since 2012

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total HA-user (n=505)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>very dissatisfied</td>
<td>13%</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>dissatisfied</td>
<td>24%</td>
<td>22%</td>
<td>31%</td>
</tr>
<tr>
<td>somewhat dissatisfied</td>
<td>39%</td>
<td>39%</td>
<td>41%</td>
</tr>
<tr>
<td>neutral</td>
<td>14%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>somewhat satisfied</td>
<td>3%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>satisfied</td>
<td>3%</td>
<td>0%</td>
<td>9%</td>
</tr>
<tr>
<td>very satisfied</td>
<td>6%</td>
<td>0%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>BTE (n=303)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>very dissatisfied</td>
<td>0.5%</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>dissatisfied</td>
<td>2%</td>
<td>22%</td>
<td>31%</td>
</tr>
<tr>
<td>somewhat dissatisfied</td>
<td>3%</td>
<td>39%</td>
<td>41%</td>
</tr>
<tr>
<td>neutral</td>
<td>16%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>somewhat satisfied</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>satisfied</td>
<td>9%</td>
<td>0%</td>
<td>9%</td>
</tr>
<tr>
<td>very satisfied</td>
<td>6%</td>
<td>0%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITE (n=102)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>very dissatisfied</td>
<td>0.3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>dissatisfied</td>
<td>12%</td>
<td>22%</td>
<td>31%</td>
</tr>
<tr>
<td>somewhat dissatisfied</td>
<td>31%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>neutral</td>
<td>4%</td>
<td>16%</td>
<td>9%</td>
</tr>
<tr>
<td>somewhat satisfied</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>satisfied</td>
<td>9%</td>
<td>0%</td>
<td>9%</td>
</tr>
<tr>
<td>very satisfied</td>
<td>6%</td>
<td>0%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITC (n=89)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>very dissatisfied</td>
<td>0.7%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>dissatisfied</td>
<td>16%</td>
<td>22%</td>
<td>31%</td>
</tr>
<tr>
<td>somewhat dissatisfied</td>
<td>28%</td>
<td>36%</td>
<td>41%</td>
</tr>
<tr>
<td>neutral</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>somewhat satisfied</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>satisfied</td>
<td>9%</td>
<td>0%</td>
<td>9%</td>
</tr>
<tr>
<td>very satisfied</td>
<td>6%</td>
<td>0%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>up to two years old (n=237)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>very dissatisfied</td>
<td>0.6%</td>
<td>8%</td>
<td>21%</td>
</tr>
<tr>
<td>dissatisfied</td>
<td>21%</td>
<td>42%</td>
<td>42%</td>
</tr>
<tr>
<td>somewhat dissatisfied</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>neutral</td>
<td>8%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>somewhat satisfied</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>satisfied</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>very satisfied</td>
<td>6%</td>
<td>0%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>older than 2 years (n=260)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>very dissatisfied</td>
<td>0.5%</td>
<td>7%</td>
<td>15%</td>
</tr>
<tr>
<td>dissatisfied</td>
<td>15%</td>
<td>26%</td>
<td>38%</td>
</tr>
<tr>
<td>somewhat dissatisfied</td>
<td>3%</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>neutral</td>
<td>8%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>somewhat satisfied</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>satisfied</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>very satisfied</td>
<td>6%</td>
<td>0%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>HA worn up to 4 hrs/day (n=106)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>very dissatisfied</td>
<td>0%</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>dissatisfied</td>
<td>15%</td>
<td>23%</td>
<td>32%</td>
</tr>
<tr>
<td>somewhat dissatisfied</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>neutral</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>somewhat satisfied</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>satisfied</td>
<td>4%</td>
<td>0%</td>
<td>9%</td>
</tr>
<tr>
<td>very satisfied</td>
<td>6%</td>
<td>0%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>HA worn 4-8 hrs/day (n=155)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>very dissatisfied</td>
<td>3%</td>
<td>4%</td>
<td>15%</td>
</tr>
<tr>
<td>dissatisfied</td>
<td>15%</td>
<td>20%</td>
<td>45%</td>
</tr>
<tr>
<td>somewhat dissatisfied</td>
<td>15%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>neutral</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>somewhat satisfied</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>satisfied</td>
<td>4%</td>
<td>0%</td>
<td>9%</td>
</tr>
<tr>
<td>very satisfied</td>
<td>6%</td>
<td>0%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2015</th>
<th>2012</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>HA worn more than 8 hrs/day (n=244)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>very dissatisfied</td>
<td>3%</td>
<td>4%</td>
<td>15%</td>
</tr>
<tr>
<td>dissatisfied</td>
<td>6%</td>
<td>24%</td>
<td>45%</td>
</tr>
<tr>
<td>somewhat dissatisfied</td>
<td>6%</td>
<td>45%</td>
<td>45%</td>
</tr>
<tr>
<td>neutral</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>somewhat satisfied</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>satisfied</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>very satisfied</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
</tbody>
</table>
Satisfaction with current hearing aids

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

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

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

% 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 Person</td>
<td>6%</td>
<td>86%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>7%</td>
<td>81%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>8%</td>
<td>80%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>11%</td>
<td>79%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>12%</td>
<td>78%</td>
</tr>
<tr>
<td>At home with family members</td>
<td>10%</td>
<td>78%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>6%</td>
<td>78%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>11%</td>
<td>76%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>11%</td>
<td>76%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>15%</td>
<td>74%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>12%</td>
<td>73%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>12%</td>
<td>72%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>10%</td>
<td>70%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>18%</td>
<td>65%</td>
</tr>
<tr>
<td><strong>In a larger lecture hall (e.g., theater, concert hall,...</strong></td>
<td>21%</td>
<td>65%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>13%</td>
<td>63%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>21%</td>
<td>59%</td>
</tr>
</tbody>
</table>

% of satisfied HA owners compared to EuroTrak 2012

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

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

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

<table>
<thead>
<tr>
<th>Dispenser</th>
<th>Quality of service after purchase 0.71</th>
<th>Quality of service during hearing aid fitting period 0.67</th>
<th>Quality of dispensers counseling 0.63</th>
<th>Professionalism of dispenser 0.62</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sound quality signal process.</td>
<td>Richness or fidelity of sound 0.76</td>
<td>Clearness of tone and sound 0.74</td>
<td>Natural sounding 0.74</td>
<td>Comfort with loud sounds 0.72</td>
</tr>
<tr>
<td>Product features</td>
<td>Reliability 0.63</td>
<td>Overall fit/ Comfort 0.62</td>
<td>Managing whistling/feedback/buzzing 0.60</td>
<td>Value (performance versus money spent) 0.58</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Visibility to others 0.56</td>
<td>Visibility to others 0.56</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Ease of changing battery 0.55</td>
<td>Battery life 0.48</td>
</tr>
</tbody>
</table>

*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: 51%
- In conversations with 1 person: 50%
- When talking on a phone: 49%
- When watching TV with others: 42%
- In conversations with small groups: 37%
- In conversations with large groups: 31%
- In noisy situations: 27%
- In a larger lecture hall (e.g., theater, concert hall, place of worship, etc.): 26%
- In the workplace: 23%
- When riding in a car: 22%
- When listening to music: 16%
- When talking to children: 15%
- In a store, when shopping: 13%
- Outdoors: 9%
- During leisure activities (e.g., exercising, taking a walk, etc.): 8%
- At a movie theater: 8%
- In school or a classroom (as an observer or student): 4%

Hearing loss Total (n=1304)
Hearing aid (n=505)
Hearing loss but no hearing aid (n=799)
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially communication effectiveness, sense of safety and participation 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...
- 5% A lot worse
- 28% Worse
- 42% The same
- 25% Better

Sense of safety
- 4% A lot worse
- 30% Worse
- 38% The same
- 26% Better

Ability to participate in group activities
- 4% A lot worse
- 32% Worse
- 47% The same
- 15% Better

Sense of independence
- 5% A lot worse
- 41% Worse
- 34% The same
- 20% Better

Confidence in yourself
- 4% A lot worse
- 41% Worse
- 36% The same
- 18% Better

Social life
- 3% A lot worse
- 43% Worse
- 33% The same
- 19% Better

Feelings about yourself
- 5% A lot worse
- 46% Worse
- 29% The same
- 18% Better

Relationships at home
- 4% A lot worse
- 50% Worse
- 27% The same
- 17% Better

Mental/emotional health
- 3% A lot worse
- 52% Worse
- 27% The same
- 17% Better

Mental ability
- 1% A lot worse
- 58% Worse
- 26% The same
- 13% Better

Relationships at work
- 4% A lot worse
- 60% Worse
- 22% The same
- 14% Better

Physical health
- 4% A lot worse
- 63% Worse
- 17% The same
- 15% Better

HA-owner, n=505
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects.

% of HA owners feeling better/a lot better

- Overall ability to communicate more
- Ability to participate in group activities
- Confidence in yourself
- Sense of independence
- Social life
- Feelings about yourself
- Relationships at home
- Mental/Emotional health
- Mental ability
- Relationships at work
- Physical health

Low 50% hearing loss (n=130)  Top 50% hearing loss (n=342)
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: 12% a lot worse, 33% worse, 28% the same, 24% better
- Social activities together with Person: 8% a lot worse, 54% worse, 21% the same, 14% better
- Personal relationship with Person: 7% a lot worse, 62% worse, 19% the same, 10% better
- Quarrels/disputes with Person: 7% a lot worse, 63% worse, 18% the same, 9% better

Someone in HH / parent has HA, n=435-465
98% 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: 2%
- Rarely: 43%
- Occasionally: 16%
- Regularly: 39%

Base: N=505
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=505)</th>
<th>%HA-Non-owner Low 50% HL (n=465)</th>
<th>%HA-Non-owner Top 50% HL (n=209)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>19%</td>
<td>40%</td>
<td>32%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>81%</td>
<td>60%</td>
<td>68%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>10%</td>
<td>62%</td>
<td>20%</td>
</tr>
<tr>
<td>Moderate</td>
<td>54%</td>
<td>34%</td>
<td>62%</td>
</tr>
<tr>
<td>Severe</td>
<td>26%</td>
<td>2%</td>
<td>14%</td>
</tr>
<tr>
<td>Profound</td>
<td>10%</td>
<td>2%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Reason</th>
<th>Somewhat a reason</th>
<th>Not a reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hear well enough in most situations</td>
<td>38%</td>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td>Hearing loss not severe enough</td>
<td>38%</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>Uncomfortable</td>
<td>29%</td>
<td>37%</td>
<td>34%</td>
</tr>
<tr>
<td>They do not restore your hearing to normal</td>
<td>32%</td>
<td>29%</td>
<td>38%</td>
</tr>
<tr>
<td>Ear doctors opinion (ENT)</td>
<td>37%</td>
<td>22%</td>
<td>41%</td>
</tr>
<tr>
<td>They do not work well in noisy situations</td>
<td>40%</td>
<td>18%</td>
<td>42%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>35%</td>
<td>16%</td>
<td>49%</td>
</tr>
<tr>
<td>Have more serious priorities</td>
<td>24%</td>
<td>26%</td>
<td>50%</td>
</tr>
<tr>
<td>Cannot afford a hearing aid</td>
<td>29%</td>
<td>20%</td>
<td>51%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>22%</td>
<td>26%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=209
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>Family doctors opinion (GP)</td>
<td>53%</td>
<td>22%</td>
<td>26%</td>
</tr>
<tr>
<td>Have sensorineural hearing loss (nerve deafness)</td>
<td>58%</td>
<td>19%</td>
<td>23%</td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>58%</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td>59%</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>59%</td>
<td>19%</td>
<td>22%</td>
</tr>
<tr>
<td>Another hearing aid owners opinion</td>
<td>59%</td>
<td>26%</td>
<td>15%</td>
</tr>
<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>64%</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>65%</td>
<td>12%</td>
<td>22%</td>
</tr>
<tr>
<td>Bad design</td>
<td>65%</td>
<td>17%</td>
<td>18%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>65%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>66%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>70%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>70%</td>
<td>9%</td>
<td>22%</td>
</tr>
<tr>
<td>Do not trust Hearing Aid Dispenser/Audiologist</td>
<td>71%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>72%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Had surgery - hearing aids wont help</td>
<td>83%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>93%</td>
<td>14%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=209
Top 10 reasons for HA owners NOT using them

- Uncomfortable
  - 49% Reason
  - 30% Somewhat a reason
  - 21% Not a reason
  - Owners who do not use, n=22

- Hear well enough in most situations
  - 16% Reason
  - 51% Somewhat a reason
  - 33% Not a reason

- They do not work well in noisy situations
  - 32% Reason
  - 25% Somewhat a reason
  - 43% Not a reason

- Have hearing loss only with high pitch sounds
  - 29% Reason
  - 17% Somewhat a reason
  - 53% Not a reason

- Hearing loss not severe enough
  - 31% Reason
  - 11% Somewhat a reason
  - 58% Not a reason

- Have more serious priorities
  - 24% Reason
  - 15% Somewhat a reason
  - 61% Not a reason

- Have tinnitus (ringing in ears)
  - 22% Reason
  - 13% Somewhat a reason
  - 65% Not a reason

- Have tried hearing aid and they do not work
  - 16% Reason
  - 19% Somewhat a reason
  - 65% Not a reason

- Bad design
  - 20% Reason
  - 13% Somewhat a reason
  - 66% Not a reason

- They do not restore your hearing to normal
  - 31% Reason
  - 3% Somewhat a reason
  - 66% Not a reason

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

- foreign object in the ear, it pinches, it hurts, too big: 55%
- uncomfortable in general: 12%
- taking it on and off, adjusting: 11%
- uncomfortable noises, feedback, etc.: 7%
- uncomfortable with glasses: 5%
- changing batteries: 5%
- afraid of losing it: 2%
- it is itching: 1%
- maintenance, cleaning: 1%
- not suited for certain activities (sports, swimming...): 1%
- others say it is uncomfortable: 1%
- cerumen, dirt, infection: 1%
- keeping it dry: 0%
- other: 7%

Base: n=332

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More than 50% of the non owners think that a hearing aid (including service) should cost them less than 500 Euro.

Wieviel denken Sie müssten Sie für ein passendes Hörgerät sowie den dazugehörigen Service bezahlen (also inkl. Diagnose, individuelle Anpassung und dem Service nach dem Kauf)?
Social rejection because of hearing loss compared to the acceptance of hearing aids
89% 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?

- 74%
- 15%
- 9%
- 2%

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

- 36%
- 28%
- 9%
- 26%

Base: N=505

Base: Top 50% hearing loss, no hearing aid N=209
Buying intentions and most important triggers to buy
19% (2012:13%) of non-owners intend to get a hearing aid within the next year.
The most important influencing factors are worsening hearing loss, ENT/“Akustiker” and Spouse. Insurance coverage/price of hearing aids is much more relevant for the non owners.

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

**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?
The most important trigger to buy a hearing aid is worsening hearing loss and the ENT followed by “Akustiker” and spouse.

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

- Hearing loss got worse: 40%
- ENT/ Ear Doctor: 21%
- "Hörgeräteakustiker": 14%
- Spouse: 8%
- GP /Family doctor: 2%
- Safety concerns: 2%
- Price of hearing aid: 2%
- Friend / relative: 2%
- Child: 2%
- Another hearing aid owner (word of mouth): 1%
- Free due to coverage by Insurance / Received hearing aid free of charge: 1%
Sample size and random sample error: Rules of thumb

READ: At a sample size of n=500 and a value of 15% we would expect the real value in an interval +3.1 around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

<table>
<thead>
<tr>
<th>Sample size</th>
<th>Real value is within interval:</th>
</tr>
</thead>
<tbody>
<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>Gender</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>Male</td>
<td>6747</td>
<td>12.7%</td>
<td>33.1%</td>
<td>48.7%</td>
<td>52.5%</td>
<td>48.5%</td>
</tr>
<tr>
<td>Female</td>
<td>7028</td>
<td>11.6%</td>
<td>36.7%</td>
<td>51.3%</td>
<td>47.5%</td>
<td>51.5%</td>
</tr>
<tr>
<td>Age recoded</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>1809</td>
<td>2.6%</td>
<td>33.8%</td>
<td>14.5%</td>
<td>2.9%</td>
<td>2.8%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1482</td>
<td>3.7%</td>
<td>28.4%</td>
<td>11.8%</td>
<td>3.6%</td>
<td>2.7%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1721</td>
<td>5.3%</td>
<td>32.9%</td>
<td>13.5%</td>
<td>5.6%</td>
<td>5.2%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1734</td>
<td>7.2%</td>
<td>15.5%</td>
<td>13.3%</td>
<td>9.8%</td>
<td>3.3%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>2322</td>
<td>9.7%</td>
<td>17.7%</td>
<td>17.3%</td>
<td>17.2%</td>
<td>6.9%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1837</td>
<td>15.0%</td>
<td>29.2%</td>
<td>12.9%</td>
<td>17.9%</td>
<td>13.8%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1461</td>
<td>23.0%</td>
<td>35.5%</td>
<td>9.4%</td>
<td>19.4%</td>
<td>20.0%</td>
</tr>
<tr>
<td>74+</td>
<td>1408</td>
<td>36.9%</td>
<td>50.7%</td>
<td>7.3%</td>
<td>23.6%</td>
<td>45.3%</td>
</tr>
<tr>
<td>Type of household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>single household</td>
<td>1902</td>
<td>19.0%</td>
<td>42.3%</td>
<td>12.7%</td>
<td>19.2%</td>
<td>26.3%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>4462</td>
<td>16.4%</td>
<td>35.3%</td>
<td>30.9%</td>
<td>43.1%</td>
<td>44.0%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>5453</td>
<td>6.9%</td>
<td>26.0%</td>
<td>41.9%</td>
<td>25.6%</td>
<td>16.8%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>702</td>
<td>5.8%</td>
<td>10.0%</td>
<td>5.5%</td>
<td>3.4%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>135</td>
<td>39.2%</td>
<td>48.5%</td>
<td>0.7%</td>
<td>2.5%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Other</td>
<td>1121</td>
<td>10.1%</td>
<td>40.3%</td>
<td>8.3%</td>
<td>6.2%</td>
<td>7.8%</td>
</tr>
</tbody>
</table>

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

<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>6652</td>
<td>16.3%</td>
<td>35.0%</td>
<td>46.5%</td>
<td>66.1%</td>
<td>68.0%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>3304</td>
<td>11.8%</td>
<td>31.2%</td>
<td>24.3%</td>
<td>25.2%</td>
<td>21.8%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>2896</td>
<td>2.2%</td>
<td>24.3%</td>
<td>23.6%</td>
<td>4.6%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Other Person</td>
<td>762</td>
<td>11.1%</td>
<td>48.3%</td>
<td>5.6%</td>
<td>4.1%</td>
<td>7.4%</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>4854</td>
<td>9.0%</td>
<td>19.8%</td>
<td>43.1%</td>
<td>33.3%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>1445</td>
<td>8.6%</td>
<td>26.0%</td>
<td>12.9%</td>
<td>8.8%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>839</td>
<td>8.2%</td>
<td>34.0%</td>
<td>7.5%</td>
<td>4.3%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>202</td>
<td>15.3%</td>
<td>38.5%</td>
<td>1.7%</td>
<td>1.8%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>1358</td>
<td>25.5%</td>
<td>42.3%</td>
<td>9.9%</td>
<td>18.8%</td>
<td>25.6%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>1960</td>
<td>29.4%</td>
<td>45.3%</td>
<td>13.6%</td>
<td>29.7%</td>
<td>45.7%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>1208</td>
<td>3.4%</td>
<td>17.1%</td>
<td>11.4%</td>
<td>3.3%</td>
<td>1.3%</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hauptschule</td>
<td>1606</td>
<td>20.7%</td>
<td>41.4%</td>
<td>12.4%</td>
<td>18.5%</td>
<td>24.3%</td>
</tr>
<tr>
<td>Mittlere Reife (Realschule)</td>
<td>2435</td>
<td>10.8%</td>
<td>33.0%</td>
<td>21.2%</td>
<td>16.7%</td>
<td>15.3%</td>
</tr>
<tr>
<td>Abitur/Fachabitur</td>
<td>1693</td>
<td>8.3%</td>
<td>35.4%</td>
<td>15.1%</td>
<td>8.6%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Lehrabschluss/Anlehre</td>
<td>2606</td>
<td>16.3%</td>
<td>36.8%</td>
<td>21.3%</td>
<td>25.4%</td>
<td>27.6%</td>
</tr>
<tr>
<td>Höhere Berufsausbildung (Techniker, Meister o.Ä.)</td>
<td>792</td>
<td>16.2%</td>
<td>28.1%</td>
<td>6.5%</td>
<td>8.6%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Fachhochschulabschluss</td>
<td>887</td>
<td>14.3%</td>
<td>29.0%</td>
<td>7.4%</td>
<td>8.5%</td>
<td>6.4%</td>
</tr>
<tr>
<td>Universitätabschluss</td>
<td>1494</td>
<td>11.1%</td>
<td>27.5%</td>
<td>13.0%</td>
<td>11.4%</td>
<td>8.0%</td>
</tr>
<tr>
<td>Anderes</td>
<td>351</td>
<td>12.2%</td>
<td>43.3%</td>
<td>3.0%</td>
<td>2.3%</td>
<td>3.3%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*

* Small sample sizes in some categories