Results

EuroTrak Spain 2020

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

EuroTrak Spain 2020 is part of the EuroTrak studies:

EuroTrak Spain 2020 was designed and executed by Anovum (Zurich) on behalf of A.N.A. (Asociación Nacional de Audioprotesistas) and EHIMA.

Sample sizes Spain 2020:
- Representative sample (sample 1): N=15'505 people
- Hearing impaired (sample 2):
  - Hearing impaired owners: N= 1'302 people
  - Hearing impaired non-owners: N= 800 people
Summary
2. Market overview

- **Stated hearing loss prevalence**
  - Total: 11.3%, 18+: 13.3%
  - Binaural hearing loss: HA owners: 60%, HA non-owners: 57%
  - Hearing Tests: 50% had a hearing test in the last 5 years, most tests done by family doctors

- **Hearing aid adoption rate (HA penetration)**
  - Total: 36.5%
  - Total age group 18+: 35.7%
  - 47% of HA owners have binaural treatment

- **The route to the hearing aid**
  - 81% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor (drop out=19%).
  - 59% got hearing aids recommended from the ENT or family doctor (drop out=27%).
  - 68% of the GP consultations referred to an ENT, 27% to an audiologist, 6% recommended no action.
  - 39% of ENT consultations referred to an audiologist, 38% recommended to get a hearing aid, 31% 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.
  - Quality of sleep seems to improve if hearing impaired use hearing aids.
Summary
3. Analysis of hearing aid owners

- Hearing aid ownership, usage and accessories
  - 65% of the currently owned HAs were bought in 2017 or later.
  - The average age of the currently owned HAs is 3.0 years.
  - The median age of hearing aids before replacement is 5 years.
  - On average, HAs are worn 8.8 hours a day.
  - 39% of today's hearing aid owners are aware of their hearing aid brand.
  - 45% have been informed about hearing aid accessories by the audiologist, 26% use a HA accessory.

- Importance of listening situations and satisfaction with HAs
  - 82% of the hearing aid owners say their hearing aid works better than or as expected
  - 78% 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, talking on a phone and watching TV with others are the most important listening situations.

- Positive impact of HAs
  - Significant positive impact of HAs on different aspects – especially communication effectiveness and ability to participate in group activities improve with hearing aids.
  - 98% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
Summary
4. Analysis of hearing impaired non-owners

- **Reasons not to own/use HAs**
  - The main reasons for not using hearing aids are that people say they would be embarrassed to wear a hearing aid, hearing loss is not severe enough, they have more serious priorities, they think that hearing aids are uncomfortable, hearing aids do not work well in noisy situations, they hear enough in most situations, hearing aids do not restore hearing to normal and they can’t afford it.
  - 6% who own hearing aids don’t use them at all (0 hours); 11% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**
  - 63% of hearing aid owners feel that people never 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 (only 28% say they are never made fun of because of their hearing loss).
  - The most important influencing factors for getting hearing aids are worsening hearing loss, the ENT, the family doctor, spouse and the audiologist. Insurance coverage/price of hearing aids is much more relevant for the current non owners.
Detailed Results: Roadmap

1. **Introduction**
   - Organisation of EuroTrak Spain 2020
   - Recruitment process: In search of hearing impaired people

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

3. **Analysis of hearing aid owners**
   - Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
   - Reasons for getting hearing aids sooner
   - Channels for getting hearing aids, recommendation of channel (NPS)
   - Awareness and usage of accessories
   - Satisfaction with hearing aids and drivers
   - Importance of listening situations
   - Positive impact of hearing aids, safety due to hearing aids, quality of life

4. **Analysis of hearing impaired non-owners**
   - Reasons for not having hearing aids
   - Social rejection because of hearing loss compared to the acceptance of hearing aids
   - Most important triggers to buy

5. **Appendix**
   - Demographics: Hearing instrument adoption rates and populations
1. Introduction
Organisation of EuroTrak Spain 2020

**Organisation**

- Principal of the project EuroTrak Spain are A.N.A. and EHIMA.
- Anovum Zurich developed the concept of EuroTrak Spain, 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**

- A.N.A. and EHIMA may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.

- The raw dataset remains at Anovum. If the principal uses the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
  
  **“Source: Anovum – EuroTrak Spain/2020/N=[relevant sample size]”**

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

- Member companies of the principal can order a report with satisfaction scores for their brand (if feasible). 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 principal’s 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 60’000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **N=15'505** 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=502** hearing aid owners and **N=800** hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age

- Women: Unimpaired non-owner
- Women: Impaired non-user
- Women: HA owner
- Men: Unimpaired non-owner
- Men: Impaired non-user
- Men: HA owner
Hearing loss prevalence Spain 2020

% hearing loss prevalence

<table>
<thead>
<tr>
<th>Age Group</th>
<th>% Hearing Loss</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>11.3%</td>
</tr>
<tr>
<td>Total 18+</td>
<td>13.3%</td>
</tr>
<tr>
<td>74+</td>
<td>38.1%</td>
</tr>
<tr>
<td>65-74</td>
<td>22.3%</td>
</tr>
<tr>
<td>55-64</td>
<td>14.5%</td>
</tr>
<tr>
<td>45-54</td>
<td>10.1%</td>
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<tr>
<td>35-44</td>
<td>7.1%</td>
</tr>
<tr>
<td>25-34</td>
<td>5.3%</td>
</tr>
<tr>
<td>15-24</td>
<td>2.5%</td>
</tr>
<tr>
<td>&lt;=14</td>
<td>2.4%</td>
</tr>
</tbody>
</table>

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Overview hearing loss prevalence and hearing aid adoption

EuroTrak Spain 2020

- Hearing impaired (stated)
- Adoption (% of population)
- Adoption (% of stated impaired)
Hearing aid adoption rate: 37% of hearing impaired have hearing aid(s), 47% 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 N=800</th>
<th>HA Owner N=502</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong> (stated)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>43%</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>57%</td>
<td>60%</td>
<td>39%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>37%</td>
<td>11%</td>
<td>15%</td>
</tr>
<tr>
<td>Moderate</td>
<td>49%</td>
<td>41%</td>
<td>33%</td>
</tr>
<tr>
<td>Severe</td>
<td>11%</td>
<td>41%</td>
<td>67%*</td>
</tr>
<tr>
<td>Profound</td>
<td>4%</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

* combined “severe” and “profound” because n is too small
Hearing tests and where hearing is tested
Hearing Tests: 50% had a hearing test in the last 5 years, most tests done by the family doctor

Have you ever taken a hearing test?
- Yes, in the last 12 months: 28%
- Yes, in the last 1-5 years: 37%
- Yes, more than 5 years ago: 13%
- No, never: 22%

Where/how was your hearing tested?
- Family doctor: 51%
- Ear, Nose and Throat specialist (ENT): 31%
- Audiologists: 15%
- Online test / smartphone app: 2%
- Other: 9%
- Don't know: 3%

Base=13'375
Base= 6'676
The route to the hearing aid:
Sources of information and drop-out rates
Doctors/HCPs are the most important sources of information and therefore the major gatekeepers.

Where did you gather information about hearing aids?

- Family doctor, ear doctor (ENT), audiologist: 40% (55% in the total)
- Internet research: combined (all three): 27% (39% in the total)
- Conversations with friends, relatives already fitted with a hearing aid: 19% (25% in the total)
- Print ads received in your mailbox: 15% (15% in the total)
- Internet research: websites of hearing aid clinics: 15% (22% in the total)
- Internet research: websites of hearing aids manufacturers: 14% (20% in the total)
- Internet research: other websites, google…: 12% (16% in the total)
- Articles in magazines or newspapers: 9% (12% in the total)
- I did not gather information about hearing aids: 4% (24% in the total)
- Other: 3% (4% in the total)
Of those who discussed the hearing loss with a doctor, 70% talked to a 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 Ear, Nose and Throat specialist (ENT)?

- **Total n= 1'052**
  - 70% Your family doctor
  - 30% Ear, Nose and Throat specialist (ENT)

- **Hearing aid (n=471)**
  - 66% Your family doctor
  - 34% Ear, Nose and Throat specialist (ENT)

- **Hearing loss but no hearing aid (n=581)**
  - 73% Your family doctor
  - 27% Ear, Nose and Throat specialist (ENT)
The route to the hearing aid

- Impaired: 100%
- Discussed hearing loss with ear doctor and/or family doctor: 81%
- Positive medical advice (Ear doctor or family doctor recommend further action): 59%
- Discussed hearing loss with HA dispenser/audiologist: 47%
- Positive advice HA dispenser/audiologist: 39%
- Bought hearing aid: 37%

Drop out:
- Impaired to ENT/Doctor: 19%
- ENT/Doctor to Recommend: 27%
- Recommend to Discussed hearing loss with HA dispenser/audiologist: 37%
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?

- Total hearing impaired: 72%
- HA owner: 86%
- Hearing impaired non-owners: 64%

What did he/she recommend?

**HA owner (Base: 405)**
- Recommended no further action: 1%
- Recommended to get a hearing aid: 26%
- Referred to an audiologist: 40%
- Referred to an Ear, Nose and Throat specialist (ENT): 65%

**Impaired non-owner (Base: 523)**
- Recommended no further action: 10%
- Recommended to get a hearing aid: 13%
- Referred to an audiologist: 18%
- Referred to an Ear, Nose and Throat specialist (ENT): 70%
The route to the hearing aid: ENT
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

- Total hearing impaired: 69%
- HA owner: 87%
- Hearing impaired non-owners: 59%

What did he/she recommend?

**HA owner (Base: 404)**
- Referred to an audiologist: 54%
- Did prescribe a hearing aid: 59%
- Recommended no further action: 3%

**Impaired non-owner (Base: 480)**
- Referred to an audiologist: 27%
- Did prescribe a hearing aid: 20%
- Recommended no further action: 55%
The route to the hearing aid: audiologist
Have you ever discussed your hearing problem with an audiologist?

% Discussed with audiologist

- **Total hearing impaired**: 47%
- **HA owner** (Base: 358)
  - Recommended to get a hearing aid: 98%
  - Recommended not to get a hearing aid: 2%
- **Impaired non-owners** (Base: 215)
  - Recommended to get a hearing aid: 61%
  - Recommended not to get a hearing aid: 39%
Recommendations by profession

- GP (N=928):
  - Referred to an ear doctor (ENT): 68%
  - Referred to an audiologist: 27%
  - Recommended to get a hearing aid: 18%
  - Recommended no further action: 6%

- ENT (N=885):
  - Referred to an ear doctor (ENT): 39%
  - Referred to an audiologist: 38%
  - Recommended to get a hearing aid: 31%

- Audiologist (N=573):
  - Referred to an ear doctor (ENT): 83%
  - Recommended to get a hearing aid: 17%
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities
Work competitiveness: 96% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?

- 69% Of significant use
- 27% Of some use
- 4% Of no use

Base: N=295
Work competitiveness: People with hearing aids recognize that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to get more salary.

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

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

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

Base: Hearing loss, no hearing aid =707/ hearing aid N=472
General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*).

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

Probability of major depressive disorder

<table>
<thead>
<tr>
<th></th>
<th>very high</th>
<th>medium</th>
<th>very low</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing aid</td>
<td>6%</td>
<td>58%</td>
<td>36%</td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>8%</td>
<td>64%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Base: hearing aid N=311 / top 50% HL, no hearing aid =140

*Construction of 6 groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:
• Number of ears impaired (one or two)
• Stated hearing loss (Mild to Profound)
• Scores on 6 APHAB-EC – like questions (Scaled 1-5)
• When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
→ People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).
**General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top50% hearing loss group*), hearing aid owners feel less exhausted in the evenings**

<table>
<thead>
<tr>
<th></th>
<th>Disagree strongly</th>
<th>Rather disagree</th>
<th>Neutral</th>
<th>Rather agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>in the evenings I often feel physically exhausted</strong></td>
<td>12%</td>
<td>21%</td>
<td>23%</td>
<td>32%</td>
<td>12%</td>
</tr>
<tr>
<td>Hearing aid</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>5%</td>
<td>27%</td>
<td>17%</td>
<td>30%</td>
<td>21%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Disagree strongly</th>
<th>Rather disagree</th>
<th>Neutral</th>
<th>Rather agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>in the evenings I often feel mentally exhausted</strong></td>
<td>14%</td>
<td>21%</td>
<td>24%</td>
<td>29%</td>
<td>12%</td>
</tr>
<tr>
<td>Hearing aid</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>9%</td>
<td>26%</td>
<td>19%</td>
<td>25%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Base: hearing aid N=309 / top 50% HL, no hearing aid =140

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

People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).
General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?

<table>
<thead>
<tr>
<th></th>
<th>Top 50% hearing loss, no hearing aid (n=140)</th>
<th>Hearing aid (n=311)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>44%</td>
<td>42%</td>
</tr>
<tr>
<td>Yes</td>
<td>56%</td>
<td>58%</td>
</tr>
</tbody>
</table>
29% of all hearing impaired think that hearing loss could be linked to depression

Please tick all of the health issues below which you think could be linked to one’s hearing loss.

- Depression: 29%
- Sleeping disorder: 26%
- High blood pressure: 15%
- Poor eyesight: 15%
- Back problems: 11%
- Diabetes: 9%
- Dementia: 7%
- Hearing loss is not linked to any of those health issues: 46%

Hearing impaired, N=1'302
3. Analysis of hearing aid owners
Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
Low adoption rates within mild hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profound</td>
<td>(5%)</td>
<td>67%*</td>
</tr>
<tr>
<td>Severe</td>
<td>(22%)</td>
<td>33%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(46%)</td>
<td>33%</td>
</tr>
<tr>
<td>Mild</td>
<td>(27%)</td>
<td>15%</td>
</tr>
</tbody>
</table>

Base: N=1'302

Sums can differ from 100% due to rounding

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

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65% of the currently owned HAs were acquired in 2017 or later

Age of currently owned HAs (Mean): 3.0 years
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.

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

Current HAs = first HAs?

- Yes: 31%
- No: 69%

How many years did you own your previous HAs?

- 1-3 years: 31%
- 4-6 years: 26%
- 7-10 years: 32%
- 11 years or longer: 10%

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

Base: N=130

HA-owner, N=502

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

- 1 year: 17%
- 2 years: 26%
- 3 years: 26%
- 4-6 years: 14%
- More than 6 years: 17%

Base: N=347
71% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

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

- **Yes**: 71%
- **No**: 29%

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

- Better social life: 77%
- Better mental/emotional health: 58%
- Better performance at work: 32%
- Less fatigue in the evening: 16%
- Other opportunity: 3%

Base: N=335
Only a minority received some kind of 3rd party reimbursement. Only 13% of the non owners think that insurance would pay.

**Owners:** Have your current hearing aids at least partially been financed by medical insurance, disability insurance or accident insurance?

- Yes, completely: 2%
- Yes, partly: 11%
- No: 69%
- don’t know: 19%

**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)

- Yes: 13%
- No: 29%
- don’t know: 59%

HA-owner, n=502

HA-non-owners, n=800
Specialized hearing aid store is by far the preferred place for obtaining hearing aids (both for owners and non owners).

**OWNERS:**
Where was your most current hearing aid obtained?

- Specialized hearing aid store: 78%
- Optician: 10%
- Pharmacy: 6%
- Online: 4%
- Club store: 1%
- Department store: 0%
- Other: 0%

**NON OWNERS:**
If you were to get hearing aids, where would you go?

- Specialized hearing aid store: 87%
- Optician: 5%
- Pharmacy: 3%
- Online: 1%
- Club store: 0%
- Department store: 1%
- Other: 2%

HA-owner, N=502
HA-non-owner, N=800
Recommendation intention of the place where the hearing aid(s) have been obtained is okay, with a positive NPS score of 10.

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

NPS = PROMOTERS – DETRACTORS = 10

HA-owner, N=502
On average, HAs are worn 8.8 hours a day

How many hours a day are HA worn?

HA-owner, N=502

In the drawer (0 hours): 6%

HA worn: Mean: 8.8 hours/day

On average, HAs are worn 8.8 hours a day
39% 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
- No, but I could find out
- No, and can't find out

HA-owner, N=502
26% of the HA owners use an accessory for their hearing aids. 68% of those who use an accessory, are satisfied with it.

Have you been informed by your hearing care professional about hearing aid accessories, such as TV-Streamer/Apps/Remote Control/etc.? (HA owners, N=502)

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>don't know / no answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>45%</td>
<td>47%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Do you personally use accessories for your hearing aids (TV-Streamer/Apps/Remote Control/etc.)? (HA owners, N=502)

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>26%</td>
<td>74%</td>
</tr>
</tbody>
</table>

**IF ACCESSORIES USED (N=144):**
Overall, how satisfied with the performance of your accessory(s)?

<table>
<thead>
<tr>
<th>very dissatisfied</th>
<th>dissatisfied</th>
<th>somewhat dissatisfied</th>
<th>neutral</th>
<th>somewhat satisfied</th>
<th>satisfied</th>
<th>very satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>7%</td>
<td>1%</td>
<td>8%</td>
<td>16%</td>
<td>23%</td>
<td>32%</td>
<td>13%</td>
</tr>
</tbody>
</table>
8% of the HA owners have already used remote fitting, 44% would consider using it. 68% of those who have used remote fitting, are satisfied with it.

Would you like the possibility of a remote fitting service (On Line) of the hearing aids? (HA owners, N=502)

- Strongly disagree: 5%
- Disagree: 11%
- Neutral: 35%
- Agree: 36%
- Strongly agree: 12%

Would you use this service or have you used it at some time? (HA owners, N= 502)

- Yes, used already: 8%
- Yes, would consider using: 44%
- No: 36%
- don't know: 12%

IF USED (N=40):
Please rate your satisfaction with the experience of remote fitting of hearing aids, in the following terms ...

- Very dissatisfied: 7%
- Dissatisfied: 11%
- Somewhat Dissatisfied: 13%
- Neutral: 15%
- Somewhat Satisfied: 18%
- Satisfied: 35%
- Very Satisfied: 35%

Spain specific question
13% of all hearing impaired have used a hearing amplifier and/or a generic amplification App. (Only) 58% of those who used such an option, were satisfied with it.

Have you ever purchased a hearing aid amplifier (not a hearing aid) or a generic amplification App for smartphones? (Hearing impaired, N=1’302)

IF USED (N=163):
Please rate your satisfaction with the experience of using a hearing aid amplifier (not a hearing aid) or a generic Amplification App for smartphone phones, in the following terms ...

Spain specific question
Satisfaction with hearing aids and drivers
82% 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?

- 33% hearing aids work better than I expected
- 48% hearing aids work as I expected
- 18% hearing aids work worse than I expected

Base: N=502
Overall satisfaction with HA: 78% of hearing aid owners are satisfied with their hearing aid(s)
Overall Satisfaction with HA: Country comparison

% of hearing aid owners satisfied

- France: 82%
- Italy: 81%
- Belgium: 80%
- Switzerland: 80%
- New Zealand: 79%
- Poland: 79%
- Spain: 78%
- Germany: 76%
- UK: 74%
- Norway: 74%
- Netherlands: 73%
- Denmark: 71%
- Japan: 38%
Satisfaction with current hearing aids

Audiologist
- Professionalism of audiologist: 7% dissatisfied, 86% satisfied
- Quality of dispensers counseling: 8% dissatisfied, 84% satisfied
- Quality of service after purchase: 6% dissatisfied, 79% satisfied
- Quality of service during hearing aid fitting period: 8% dissatisfied, 79% satisfied

Sound quality
- Clarity of tone and sound: 11% dissatisfied, 78% satisfied
- Natural sounding: 11% dissatisfied, 78% satisfied
- Richness or fidelity of sound: 13% dissatisfied, 76% satisfied
- Comfort with loud sounds: 13% dissatisfied, 73% satisfied

Product features
- Ease of changing battery: 7% dissatisfied, 84% satisfied
- Overall fit/Comfort: 7% dissatisfied, 80% satisfied
- Reliability: 9% dissatisfied, 77% satisfied
- Visibility to others: 9% dissatisfied, 76% satisfied
- Battery life: 18% dissatisfied, 72% satisfied
- Managing whistling/feedback/buzzing: 15% dissatisfied, 68% satisfied
- Value (performance versus money spent): 20% dissatisfied, 64% satisfied

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

HA-owner, N=502
Satisfaction with current hearing aids

Listening situation

- At home with family members
- Conversation with one Person
- Conversation in small groups
- Watching TV
- Outdoors
- When talking to children
- In a store, when shopping
- Listening to Music
- Leisure activities
- When riding in a car
- On the telephone
- In a larger lecture hall
- At a movie theater
- Conversation in large groups
- In school or a classroom (as an observer or student)
- In the workplace
- Use in noisy situations

<table>
<thead>
<tr>
<th>Situation</th>
<th>Dissatisfied (%)</th>
<th>Satisfied (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home with family members</td>
<td>10%</td>
<td>81%</td>
</tr>
<tr>
<td>Conversation with one Person</td>
<td>8%</td>
<td>81%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>10%</td>
<td>79%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>11%</td>
<td>78%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>10%</td>
<td>78%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>11%</td>
<td>78%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>12%</td>
<td>78%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>11%</td>
<td>76%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>9%</td>
<td>75%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>9%</td>
<td>73%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>13%</td>
<td>73%</td>
</tr>
<tr>
<td>In a larger lecture hall</td>
<td>13%</td>
<td>73%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>13%</td>
<td>73%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>13%</td>
<td>72%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>13%</td>
<td>71%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>12%</td>
<td>71%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>19%</td>
<td>67%</td>
</tr>
</tbody>
</table>

\%dissatisfied = % very dissatisfied + % dissatisfied + % somewhat dissatisfied
\%satisfied = % somewhat satisfied + % satisfied + % very satisfied
Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA

<table>
<thead>
<tr>
<th>Influence on overall satisfaction with HA*</th>
<th>0.77</th>
<th>0.77</th>
<th>0.75</th>
<th>0.70</th>
<th>0.75</th>
<th>0.70</th>
<th>0.69</th>
<th>0.69</th>
<th>0.63</th>
<th>0.61</th>
<th>0.55</th>
<th>0.53</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of service after purchase</td>
<td>0.58</td>
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<tr>
<td>Quality of dispensers counseling</td>
<td>0.56</td>
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<tr>
<td>Professionalism of dispenser</td>
<td>0.54</td>
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<tr>
<td>Quality of service during hearing aid fitting period</td>
<td>0.53</td>
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<tr>
<td>Richness or fidelity of sound</td>
<td>0.77</td>
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<tr>
<td>Clearness of tone and sound</td>
<td>0.77</td>
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<tr>
<td>Natural sounding</td>
<td>0.75</td>
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<tr>
<td>Comfort with loud sounds</td>
<td>0.70</td>
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<tr>
<td>Value (performance versus money spent)</td>
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<tr>
<td>Reliability</td>
<td>0.70</td>
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<tr>
<td>Overall fit/ Comfort</td>
<td>0.69</td>
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<tr>
<td>Visibility to others</td>
<td>0.69</td>
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<tr>
<td>Managing whistling/feedback/buzzing</td>
<td>0.63</td>
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<tr>
<td>Battery life</td>
<td>0.61</td>
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<tr>
<td>Ease of changing battery</td>
<td>0.55</td>
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</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 & clearness of tone and sound are the most important criteria 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: 54%
- In conversations with 1 person: 51%
- When talking on a phone: 42%
- When watching TV with others: 37%
- In conversations with large groups: 33%
- In conversations with small groups: 29%
- In noisy situations: 27%
- In the workplace: 24%
- In a larger lecture hall: 18%
- When riding in a car: 16%
- In a store, when shopping: 16%
- Leisure activities: 14%
- At a movie theater: 12%
- When talking to children: 10%
- When listening to music: 9%
- Outdoors: 8%
- In school or a classroom (as an observer or student): 8%

Hearing loss Total (n=1'302)
Hearing aid (n=502)
Hearing loss but no hearing aid (n=800)
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially Communication effectiveness, ability to participate in group activities and sense of independence 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 situations
- 4% a lot worse
- 20% worse
- 41% the same
- 34% better
- 3% a lot better

Ability to participate in group activities
- 4% a lot worse
- 22% worse
- 44% the same
- 30% better
- 3% a lot better

Sense of independence
- 3% a lot worse
- 25% worse
- 38% the same
- 35% better
- 4% a lot better

Sense of safety
- 3% a lot worse
- 25% worse
- 39% the same
- 33% better
- 4% a lot better

Social life
- 4% a lot worse
- 24% worse
- 41% the same
- 30% better
- 4% a lot better

Relationships at home
- 3% a lot worse
- 27% worse
- 41% the same
- 29% better
- 4% a lot better

Confidence in yourself
- 2% a lot worse
- 28% worse
- 35% the same
- 34% better
- 4% a lot better

Relationships at work
- 2% a lot worse
- 31% worse
- 36% the same
- 31% better
- 4% a lot better

Mental/emotional health
- 2% a lot worse
- 31% worse
- 34% the same
- 32% better
- 4% a lot better

Feelings about yourself
- 0% a lot worse
- 33% worse
- 34% the same
- 31% better
- 4% a lot better

Mental ability
- 3% a lot worse
- 38% worse
- 34% the same
- 24% better
- 4% a lot better

Physical health
- 3% a lot worse
- 44% worse
- 32% the same
- 21% better
- 4% a lot better
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

Low 50% hearing loss (n=173)  Top 50% hearing loss (n=306)
Most hearing aid owners feel more confident moving in a city since wearing hearing aids!

Since wearing a hearing aid, do you feel more confident moving in a city, e.g. because you hear traffic signals/vehicles approaching?

- **Yes**: 87%
- **No**: 13%

Base: N=502
Also 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**: 3% a lot worse, 7% worse, 25% the same, 32% better, 33% a lot better
- **Social activities together with Person**: 4% a lot worse, 5% worse, 35% the same, 29% better, 28% a lot better
- **Personal relationship with Person**: 8% a lot worse, 38% worse, 29% the same, 27% better
- **Quarrels/disputes with Person**: 8% a lot worse, 5% worse, 47% the same, 28% better, 18% a lot better
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: 10%
- Occasionally: 25%
- Regularly: 64%

Base: N=502
4. Analysis of hearing impaired non-owners
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.

<table>
<thead>
<tr>
<th></th>
<th>HA Owner N=502</th>
<th>HA-Non-owner Low 50% HL N=466</th>
<th>Non-owner Top 50% HL N=217</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>40%</td>
<td>55%</td>
<td>25%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>60%</td>
<td>45%</td>
<td>75%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>11%</td>
<td>52%</td>
<td>7%</td>
</tr>
<tr>
<td>Moderate</td>
<td>41%</td>
<td>43%</td>
<td>60%</td>
</tr>
<tr>
<td>Severe</td>
<td>41%</td>
<td>4%</td>
<td>22%</td>
</tr>
<tr>
<td>Profound</td>
<td>8%</td>
<td>0%</td>
<td>11%</td>
</tr>
</tbody>
</table>

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

1. Would be embarrassed to wear a hearing aid: 52% Reason, 22% Somewhat a reason, 26% Not a reason
2. Hearing loss not severe enough: 43% Reason, 28% Somewhat a reason, 29% Not a reason
3. Have more serious priorities: 45% Reason, 25% Somewhat a reason, 30% Not a reason
4. Uncomfortable: 44% Reason, 24% Somewhat a reason, 32% Not a reason
5. They do not work well in noisy situations: 38% Reason, 27% Somewhat a reason, 36% Not a reason
6. Hear well enough in most situations: 25% Reason, 37% Somewhat a reason, 38% Not a reason
7. They do not restore your hearing to normal: 41% Reason, 19% Somewhat a reason, 40% Not a reason
8. Cannot afford a hearing aid: 45% Reason, 13% Somewhat a reason, 42% Not a reason
9. Have tinnitus (ringing in ears): 42% Reason, 13% Somewhat a reason, 45% Not a reason
10. Have hearing loss only with high pitch sounds: 35% Reason, 16% Somewhat a reason, 49% Not a reason

Base: non owners Top 50% HL: N=217
Less important reasons for not having a hearing aid (II/II)

<table>
<thead>
<tr>
<th>Reason</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>Have hearing loss only with low frequency sounds</td>
<td>30%</td>
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<td>49%</td>
</tr>
<tr>
<td>Ear doctors opinion (ENT)</td>
<td>33%</td>
<td>17%</td>
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<td></td>
<td></td>
<td>50%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>27%</td>
<td>21%</td>
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<td></td>
<td>52%</td>
</tr>
<tr>
<td>Bad design</td>
<td>25%</td>
<td>23%</td>
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<td></td>
<td></td>
<td></td>
<td>53%</td>
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<tr>
<td>Have hearing loss in only one ear</td>
<td>31%</td>
<td>15%</td>
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<td></td>
<td></td>
<td>54%</td>
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<tr>
<td>I have vision or dexterity problems</td>
<td>30%</td>
<td>15%</td>
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<td></td>
<td></td>
<td></td>
<td>55%</td>
</tr>
<tr>
<td>Family doctors opinion (GP)</td>
<td>29%</td>
<td>15%</td>
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<td>56%</td>
</tr>
<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>23%</td>
<td>20%</td>
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<td>57%</td>
</tr>
<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>27%</td>
<td>13%</td>
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<td>60%</td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>25%</td>
<td>14%</td>
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<td></td>
<td></td>
<td>61%</td>
</tr>
<tr>
<td>Another hearing aid owners opinion</td>
<td>21%</td>
<td>16%</td>
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<td></td>
<td>63%</td>
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<tr>
<td>Hearing problem requires surgery</td>
<td>21%</td>
<td>12%</td>
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<td>67%</td>
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<tr>
<td>Have tried hearing aid and they do not work</td>
<td>17%</td>
<td>15%</td>
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<td></td>
<td>68%</td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>24%</td>
<td>8%</td>
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<td>68%</td>
</tr>
<tr>
<td>Do not trust Hearing Aid Dispenser/Audiologist</td>
<td>16%</td>
<td>12%</td>
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<td>72%</td>
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<tr>
<td>Had surgery - hearing aids wont help</td>
<td>19%</td>
<td>8%</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td>73%</td>
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<tr>
<td>Do not know where to get hearing aids</td>
<td>9%</td>
<td>12%</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>79%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: N=217
Top 10 reasons for HA owners NOT using them

- They do not restore your hearing to normal: 47% Reason, 26% Somewhat a reason, 27% Not a reason
- Hear well enough in most situations: 38% Reason, 35% Somewhat a reason, 28% Not a reason
- Have Sensor-neural hearing loss (nerve deafness): 47% Reason, 22% Somewhat a reason, 31% Not a reason
- Have tinnitus (ringing in ears): 65% Reason, 4% Somewhat a reason, 31% Not a reason
- Have tried hearing aid and they do not work: 27% Reason, 41% Somewhat a reason, 32% Not a reason
- Hearing loss not severe enough: 67% Reason, 2% Somewhat a reason, 32% Not a reason
- Would be embarrassed to wear a hearing aid: 40% Reason, 33% Somewhat a reason, 27% Not a reason
- Have hearing loss only with high pitch sounds: 23% Reason, 27% Somewhat a reason, 33% Not a reason
- They do not work well in noisy situations: 21% Reason, 20% Somewhat a reason, 34% Not a reason
- I have vision or dexterity problems: 20% Reason, 20% Somewhat a reason, 34% Not a reason

Owners who don't use, N=20 (very low sample!)
Social rejection because of hearing loss compared to the acceptance of hearing aids
63% of hearing aid owners feel that people never 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?

- 63%
- 20%
- 12%
- 5%

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

- 36%
- 32%
- 4%
- 28%
Most important triggers to buy
The most important influencing factors are worsening hearing loss, ENT, GP, spouse and audiologist (price, insurance coverage 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)?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Non-owner</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing loss gets/got worse</td>
<td>44%</td>
<td>55%</td>
</tr>
<tr>
<td>ENT/ Ear Doctor</td>
<td>42%</td>
<td>54%</td>
</tr>
<tr>
<td>Price of hearing aid</td>
<td>30%</td>
<td>46%</td>
</tr>
<tr>
<td>GP /Family doctor</td>
<td>28%</td>
<td>42%</td>
</tr>
<tr>
<td>Spouse</td>
<td>30%</td>
<td>46%</td>
</tr>
<tr>
<td>Audiologist</td>
<td>31%</td>
<td>46%</td>
</tr>
<tr>
<td>Child</td>
<td>28%</td>
<td>46%</td>
</tr>
<tr>
<td>Free due to coverage by Insurance / Received hearing aid free of...</td>
<td>23%</td>
<td>46%</td>
</tr>
<tr>
<td>Financial Situation improved</td>
<td>22%</td>
<td>46%</td>
</tr>
<tr>
<td>Relative, friend</td>
<td>16%</td>
<td>46%</td>
</tr>
<tr>
<td>Another hearing aid owner (word of mouth)</td>
<td>16%</td>
<td>46%</td>
</tr>
<tr>
<td>Safety concerns</td>
<td>13%</td>
<td>46%</td>
</tr>
<tr>
<td>TV advertisement</td>
<td>12%</td>
<td>46%</td>
</tr>
<tr>
<td>Hearing loss article or literature</td>
<td>12%</td>
<td>46%</td>
</tr>
<tr>
<td>Co-worker or boss</td>
<td>11%</td>
<td>46%</td>
</tr>
<tr>
<td>Information/advice about hearing loss from consumer...</td>
<td>11%</td>
<td>46%</td>
</tr>
<tr>
<td>Internet: Websites of hearing aids manufacturers</td>
<td>10%</td>
<td>46%</td>
</tr>
<tr>
<td>Internet: Other websites, google...</td>
<td>10%</td>
<td>46%</td>
</tr>
<tr>
<td>Newspaper advertisement</td>
<td>9%</td>
<td>46%</td>
</tr>
<tr>
<td>Magazine advertisement</td>
<td>9%</td>
<td>46%</td>
</tr>
<tr>
<td>Direct mail piece</td>
<td>8%</td>
<td>46%</td>
</tr>
<tr>
<td>Radio advertisement</td>
<td>8%</td>
<td>46%</td>
</tr>
<tr>
<td>Telemarketing phone call</td>
<td>6%</td>
<td>46%</td>
</tr>
<tr>
<td>Celebrity or public Personality</td>
<td>3%</td>
<td>46%</td>
</tr>
</tbody>
</table>

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

- Hearing aid (n=502)
- Hearing loss but no hearing aid (n=800)
The most important trigger to buy a hearing aid is worsening hearing loss, followed by the ENT and the audiologist.

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

- Hearing loss got worse: 26%
- ENT/Ear Doctor: 19%
- Audiologist: 10%
- Child: 8%
- GP/Family doctor: 7%
- Spouse: 7%
- Price of hearing aid: 4%
- Another hearing aid owner (word of mouth): 3%
- TV advertisement: 3%
- Friend/relative: 2%
- Safety concerns: 2%
Demographics (1) Hearing instrument adoption rates and populations

<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>7'657</td>
<td>11.8%</td>
<td>35.9%</td>
<td>49.1%</td>
<td>51.9%</td>
<td>50.5%</td>
</tr>
<tr>
<td>Female</td>
<td>7'848</td>
<td>10.9%</td>
<td>37.2%</td>
<td>50.9%</td>
<td>48.1%</td>
<td>49.5%</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>2'352</td>
<td>2.4%</td>
<td>57.0%</td>
<td>16.7%</td>
<td>2.1%</td>
<td>4.9%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1'513</td>
<td>2.5%</td>
<td>44.2%</td>
<td>10.7%</td>
<td>1.9%</td>
<td>2.6%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1'794</td>
<td>5.3%</td>
<td>42.1%</td>
<td>12.4%</td>
<td>4.9%</td>
<td>6.2%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>2'519</td>
<td>7.1%</td>
<td>38.0%</td>
<td>17.0%</td>
<td>10.0%</td>
<td>10.6%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>2'523</td>
<td>10.1%</td>
<td>17.9%</td>
<td>16.5%</td>
<td>18.8%</td>
<td>7.1%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1'965</td>
<td>14.5%</td>
<td>29.7%</td>
<td>12.2%</td>
<td>17.9%</td>
<td>13.1%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1'457</td>
<td>22.3%</td>
<td>41.2%</td>
<td>8.2%</td>
<td>17.1%</td>
<td>20.9%</td>
</tr>
<tr>
<td>74+</td>
<td>1'382</td>
<td>38.1%</td>
<td>42.1%</td>
<td>6.2%</td>
<td>27.3%</td>
<td>34.5%</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>1'157</td>
<td>21.7%</td>
<td>36.8%</td>
<td>6.6%</td>
<td>14.2%</td>
<td>14.4%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>3'351</td>
<td>16.5%</td>
<td>38.0%</td>
<td>20.3%</td>
<td>30.8%</td>
<td>32.8%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>7'808</td>
<td>7.7%</td>
<td>38.6%</td>
<td>52.4%</td>
<td>32.9%</td>
<td>36.0%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>1'165</td>
<td>9.3%</td>
<td>31.0%</td>
<td>7.7%</td>
<td>6.7%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>177</td>
<td>26.7%</td>
<td>38.0%</td>
<td>0.9%</td>
<td>2.6%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Other</td>
<td>1'846</td>
<td>10.8%</td>
<td>28.2%</td>
<td>12.0%</td>
<td>12.8%</td>
<td>8.7%</td>
</tr>
</tbody>
</table>

<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>7'122</td>
<td>16.5%</td>
<td>35.1%</td>
<td>43.2%</td>
<td>68.5%</td>
<td>64.5%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>3'196</td>
<td>10.7%</td>
<td>39.0%</td>
<td>20.8%</td>
<td>18.7%</td>
<td>20.8%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>4'045</td>
<td>2.5%</td>
<td>34.6%</td>
<td>28.7%</td>
<td>6.0%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Other person</td>
<td>1'141</td>
<td>11.9%</td>
<td>43.9%</td>
<td>7.3%</td>
<td>6.8%</td>
<td>9.3%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*
Demographics (2) Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th>Employment</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>Full time employed</td>
<td>5'866</td>
<td>9.7%</td>
<td>32.4%</td>
<td>46.8%</td>
<td>35.2%</td>
<td>30.4%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>1'196</td>
<td>7.1%</td>
<td>28.7%</td>
<td>9.8%</td>
<td>5.6%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>1'670</td>
<td>8.7%</td>
<td>26.3%</td>
<td>13.5%</td>
<td>9.8%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>286</td>
<td>18.5%</td>
<td>25.7%</td>
<td>2.1%</td>
<td>3.6%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>299</td>
<td>21.3%</td>
<td>41.9%</td>
<td>2.1%</td>
<td>3.4%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>2'633</td>
<td>29.1%</td>
<td>40.8%</td>
<td>16.5%</td>
<td>41.5%</td>
<td>51.6%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>1'068</td>
<td>1.5%</td>
<td>38.0%</td>
<td>9.3%</td>
<td>0.9%</td>
<td>1.0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</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>Estudios Primarios</td>
<td>1'849</td>
<td>25.6%</td>
<td>33.1%</td>
<td>12.2%</td>
<td>29.1%</td>
<td>25.9%</td>
</tr>
<tr>
<td>Estudios Secundarios</td>
<td>1'851</td>
<td>13.4%</td>
<td>36.7%</td>
<td>14.2%</td>
<td>14.4%</td>
<td>15.1%</td>
</tr>
<tr>
<td>Bachillerato / Ciclos Formativos de Grado Medio</td>
<td>3'645</td>
<td>10.7%</td>
<td>35.5%</td>
<td>28.7%</td>
<td>23.2%</td>
<td>22.9%</td>
</tr>
<tr>
<td>Bachillerato / Ciclos Formativos de Grado Superior</td>
<td>3'455</td>
<td>9.9%</td>
<td>35.3%</td>
<td>27.5%</td>
<td>20.3%</td>
<td>19.9%</td>
</tr>
<tr>
<td>Universitarios (Post Grado / Master / Doctorado)</td>
<td>1'934</td>
<td>10.2%</td>
<td>43.2%</td>
<td>15.3%</td>
<td>10.3%</td>
<td>14.1%</td>
</tr>
<tr>
<td>Otros</td>
<td>283</td>
<td>15.3%</td>
<td>30.2%</td>
<td>2.1%</td>
<td>2.8%</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*

* Small sample sizes in some categories