

## Results

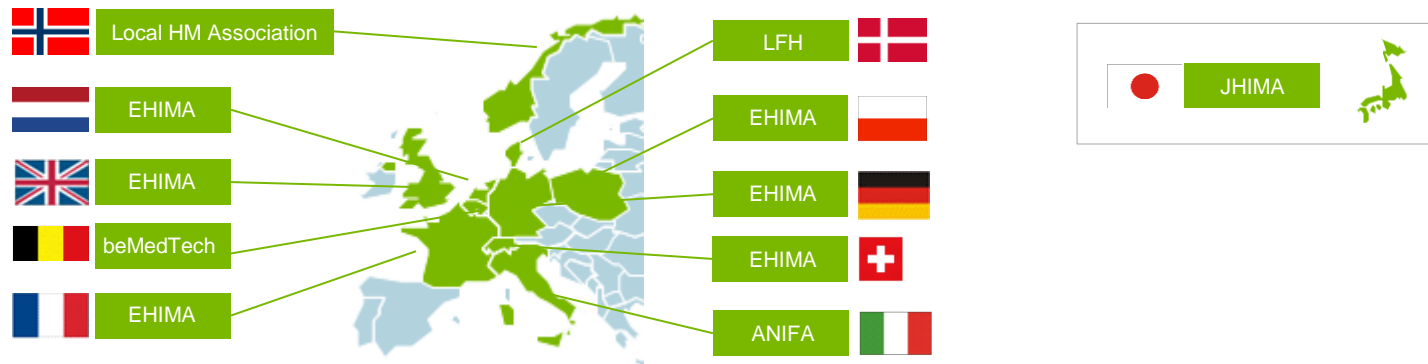
# EuroTrak UK 2018

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

# Summary

## 1. Introduction

- EuroTrak UK 2018 was designed and executed by Anovum (Zurich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).
- Sample sizes UK 2018:
  - Representative sample (sample 1): n=14'855 people
  - Hearing impaired (sample 2): n=1'300 people
    - Hearing impaired non-owners: n= 602 people with hearing loss (**HL**)
    - HA owners: n= 698 people with hearing aid (**HA**)
- EuroTrak UK 2018 is part of the EuroTrak studies:



# Summary

## 2. Market overview

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- Stated hearing loss prevalence
  - Total: 9.7 %, 18+: 11.6% (2015: 9.7%, 18+: 11.7%).
  - Binaural hearing loss: HA owners: 73%, HA non-owners: 55%.
  - Hearing Tests: 34% had a hearing test in the last 5 years, most tests done by family doctors and HCPs.
- Hearing aid adoption rate (HA penetration)
  - Total: 47.6% (2015: 42.4%).
  - Total age group 18+: 47.8% (2015: 42.7%).
  - 61% of HA owners have binaural treatment.
- The route to the hearing aid
  - 72% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 58% got hearing aids recommended from the ENT or family doctor.
  - 41% of the GP consultations referred to an audiologist, 50% referred to an ENT, 9% recommended no action.
  - 40% of ENT consultations referred to an audiologist, 47% recommended to get a hearing aid, 21% 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.
  - More than half of the hearing impaired believe that hearing loss is linked to other health issues.

# Summary

## 3. Analysis of hearing aid owners

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- Hearing aid ownership, usage and accessories
  - 75% received NHS hearing devices.
  - 74% of the currently owned HAs were fitted in 2015 or later.
  - The average age of the currently owned HAs is 2.3 years.
  - The median age of hearing aids before replacement is 4 years.
  - On average, HAs are worn 7.8 hours a day.
  - 22% of today's hearing aid owners are aware of their hearing aid brand.
  - 22% have been informed about hearing aid accessories by the HCP, 15% use a HA accessory.
  - 31% of all HA owners have ever had a repair on their current hearing aid(s).
- Importance of listening situations and satisfaction with HAs
  - 85% of the hearing aid owners say their hearing aid works better than or as expected.
  - 74% of the HA owners are satisfied with their HAs.
  - The more hours worn per day, the higher the satisfaction.
  - Talking at home with family members, talking on a phone and watching TV with others are the most frequent important listening situations.
- Positive impact of HAs
  - Significant positive impact of HAs on different aspects – especially communication, participation in group activities, social life and self confidence.
  - 2 out of 3 hearing aid owners feel more confident moving in a city since wearing hearing aids.
  - 94% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

# Summary

## 4. Analysis of hearing impaired non-owners

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- Reasons not to own/use HAs
  - Only 28% of the hearing impaired without hearing aids think that a third party would pay any part of hearing aids.
  - The main reasons for not using hearing aids are that people say that they hear well enough in most situations, they would be embarrassed to wear one and they argue hearing aids are uncomfortable.
  - 8% who own HAs don't use them at all (0 hours); 18% use them 1 hour or less/day (0-1 hours).
- Social rejection, buying intentions and triggers to buy
  - 71% of hearing aid owners feel that 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 (only 27% say they are never made fun of because of their hearing loss).
  - The most important influencing factors for getting a hearing aid are the family doctor, worsening of hearing, ENT doctor, the audiologist and spouses. Insurance coverage/price of hearing aids is among the top reasons for the non owners only.

# Detailed Results: Roadmap

**New topics for EuroTrak 2018 are highlighted in red**

## 1. Introduction

- Organisation of EuroTrak 2018
- 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

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# 1. Introduction

# Organisation of EuroTrak 2018

## Organisation

- Principal of the project EuroTrak is the European Hearing Instrument Manufacturers Association [EHIMA]. Members of EHIMA are: GN Resound as, William Demant Holding A/S, Sonova AG, Sivantos Pte. Ltd., STARKEY LABS and WIDEX AS [EHIMA Companies].
- Anovum Zurich developed the concept of EuroTrak, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore Anovum analysed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire.

## Use of the data

- The principal as well as the EHIMA companies may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.
- The raw dataset remains at Anovum. If the principal or the EHIMA companies use the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:  
**“Source: Anovum – EuroTrak – UK/2018/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 80'000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=14'855** 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=698** hearing aid owners and **n=602** hearing impaired non-owners

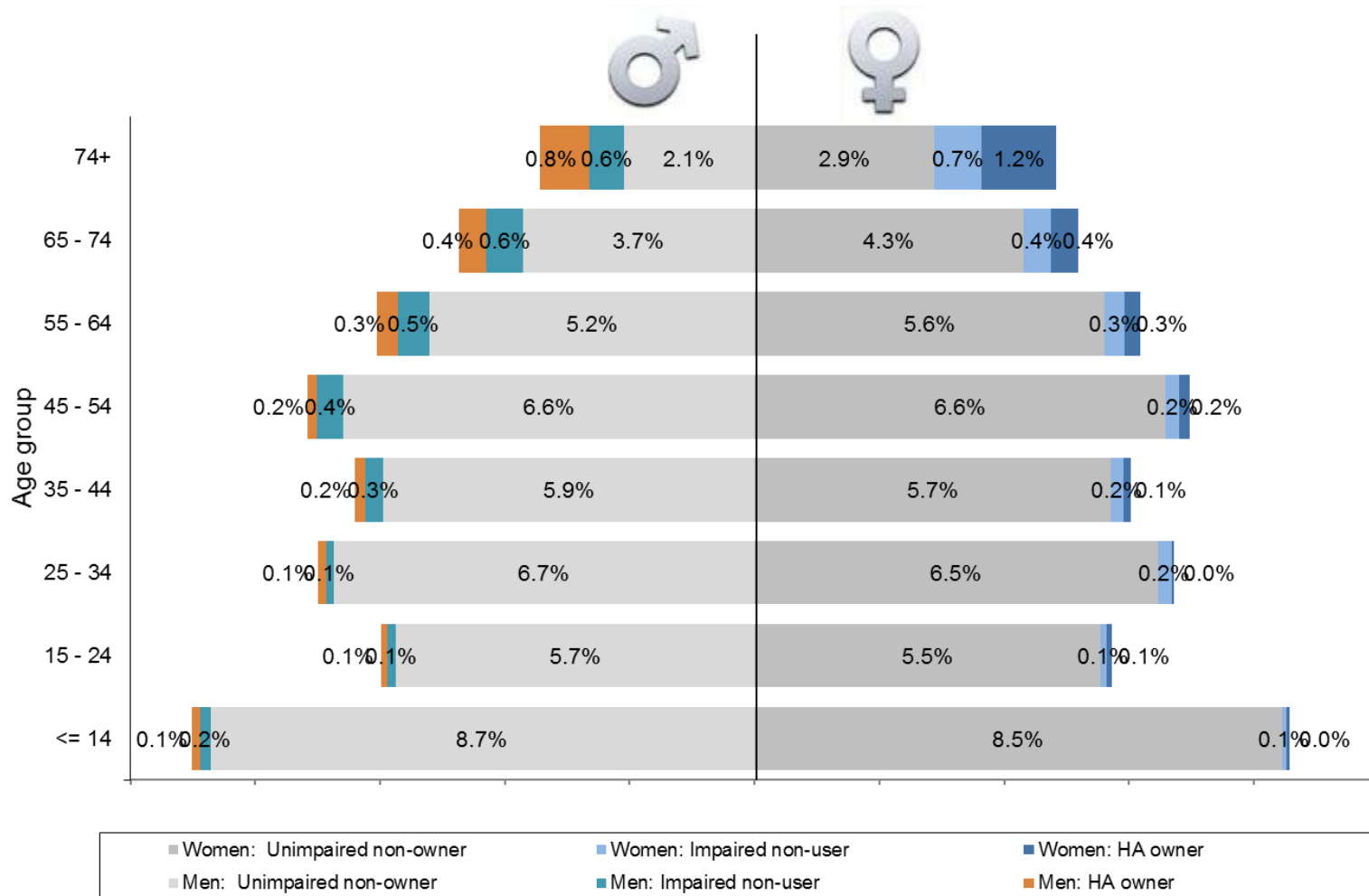
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## 2. Market overview

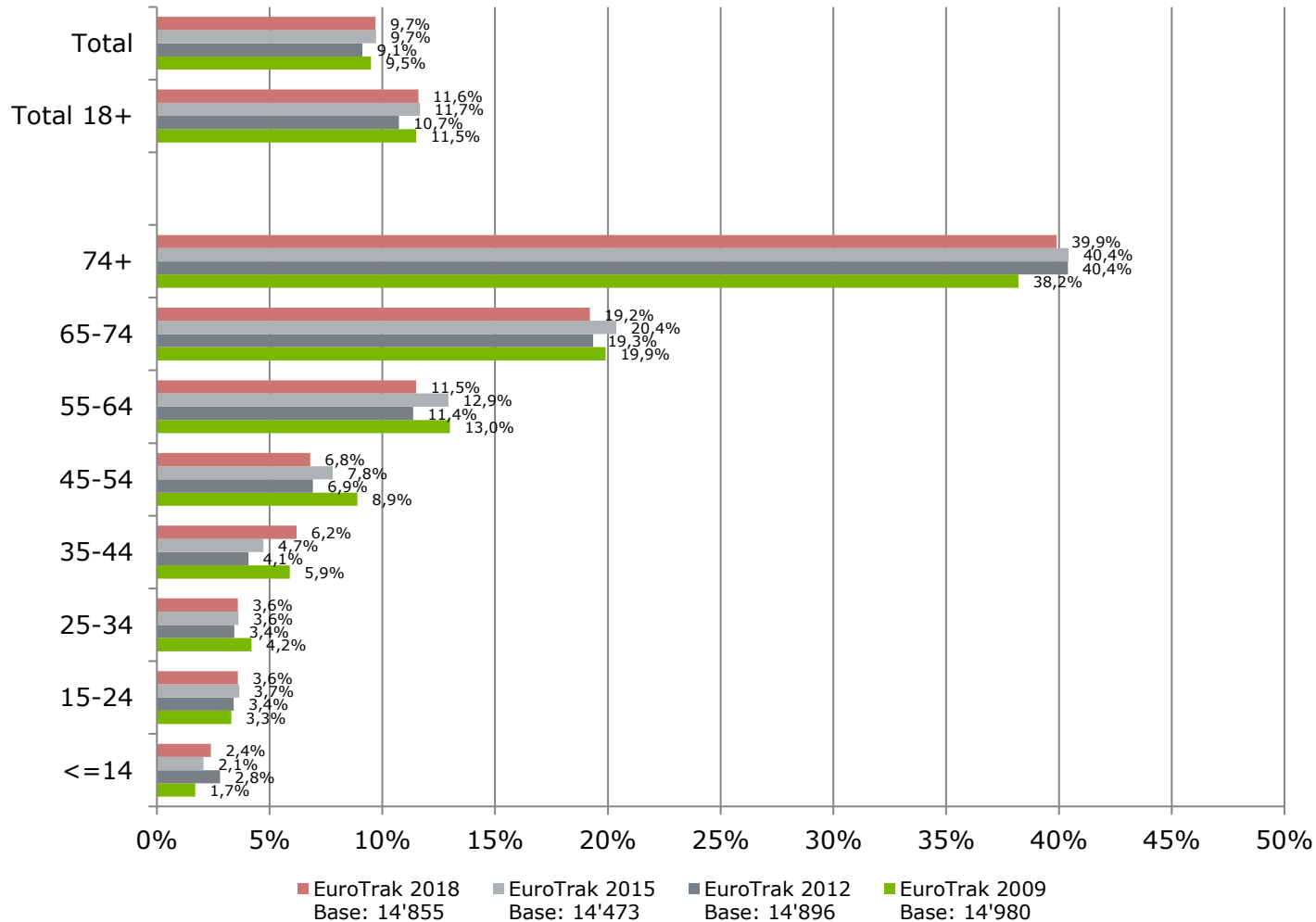
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# Prevalence of hearing loss and adoption rate

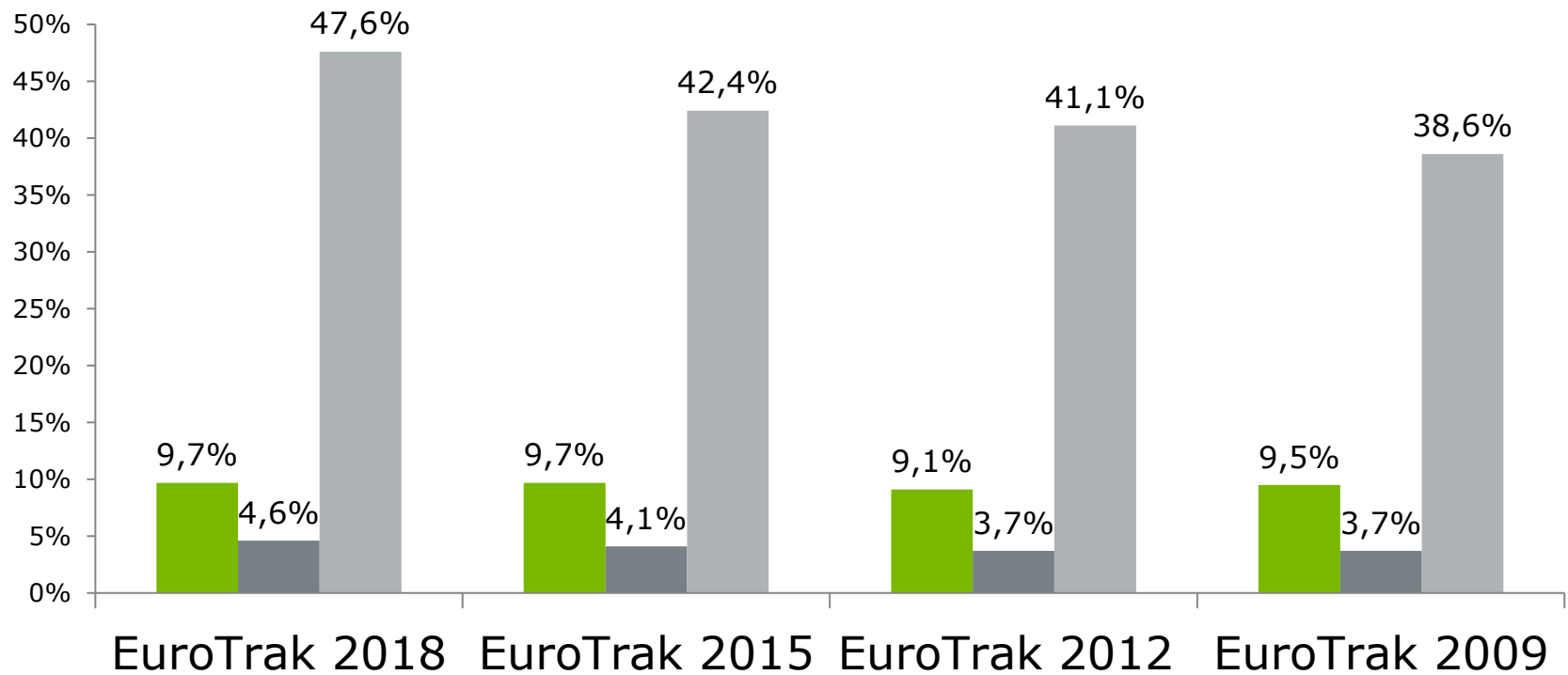
# Hearing loss and hearing instrument ownership by gender/age



# Hearing loss prevalence UK

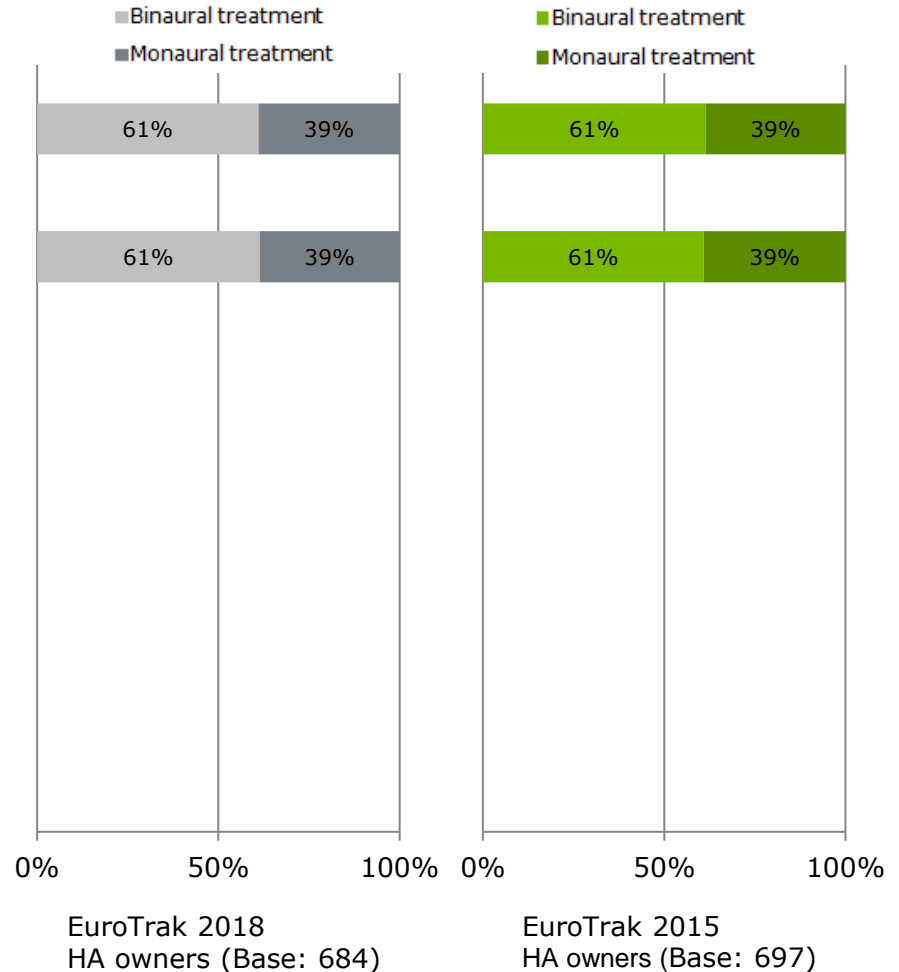
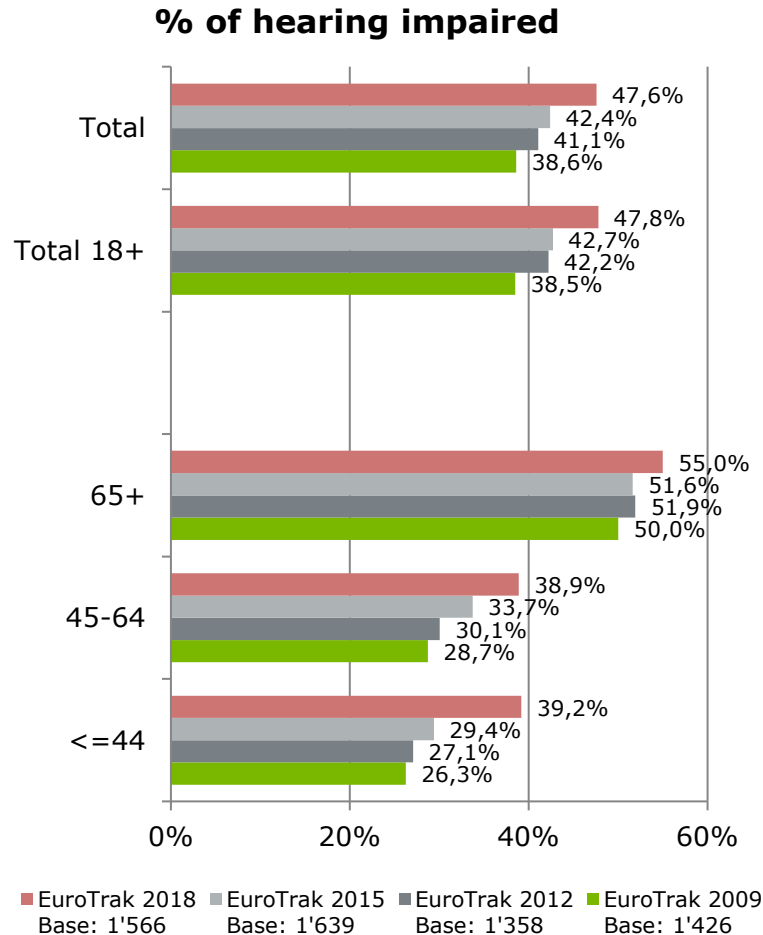


# Overview hearing loss prevalence and hearing aid adoption

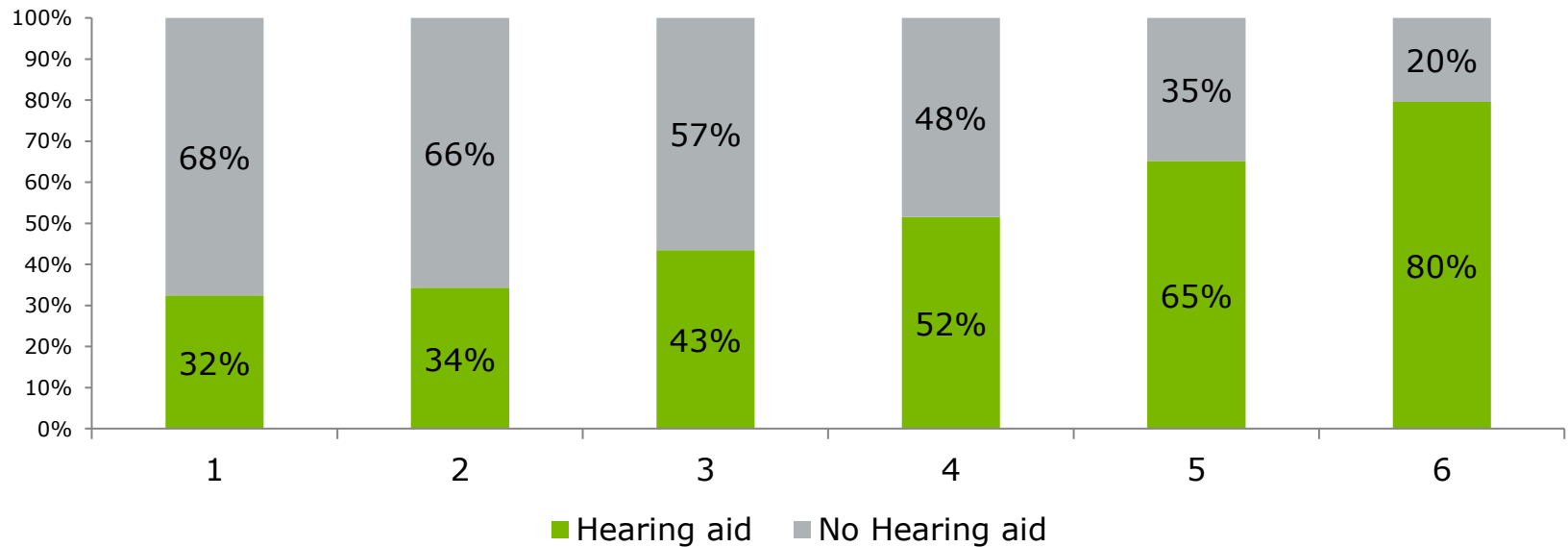


■ Hearing impaired (stated) ■ Adoption (% of population) ■ Adoption (% of stated impaired)

# Hearing aid adoption rate UK: 48% of hearing impaired have hearing aid(s), 61% of them have binaural treatment



# The more severe the hearing loss, the higher the adoption rate



Hearing loss 6-groups

HA-non-owner, n=495  
HA-owner, n=625

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

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

→ People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



# Hearing loss

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

	HA-Non-owner 2018: n=602	HA Owner 2018: n=698	Hearing Aid Adoption (%)
<b>Ears impaired (stated)</b>			
Unilateral loss	45%	27%	39%
Bilateral loss	55%	73%	58%
<b>Perceived loss</b>			
Mild	42%	18%	30%
Moderate	47%	53%	52%
Severe	9%	25%	71%*
Profound	3%	4%	

n's are unweighted whereas the shown results are weighted

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

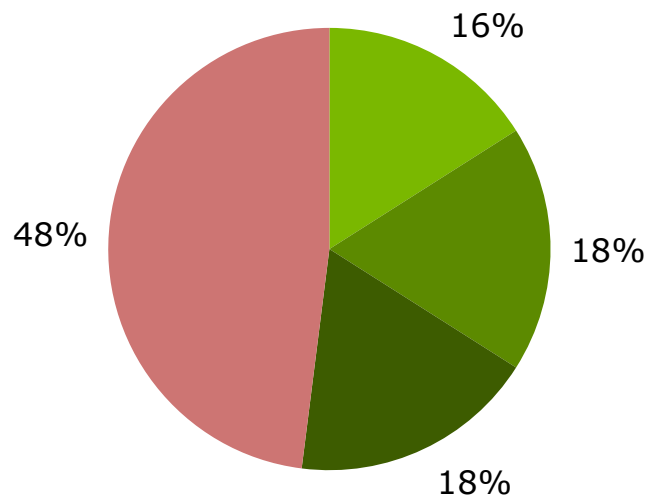
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# Hearing tests and where hearing is tested

# Hearing Tests: 34% had a hearing test in the last 5 years, most tests are done by family doctors, followed by HCPs and ENTs.

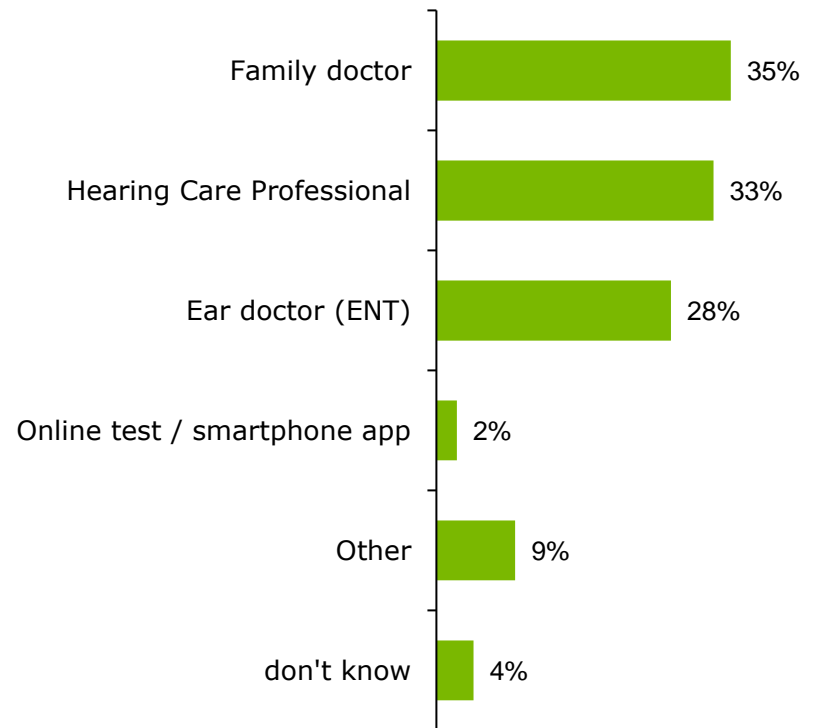
Have you ever taken a hearing test?

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



Base=11'431

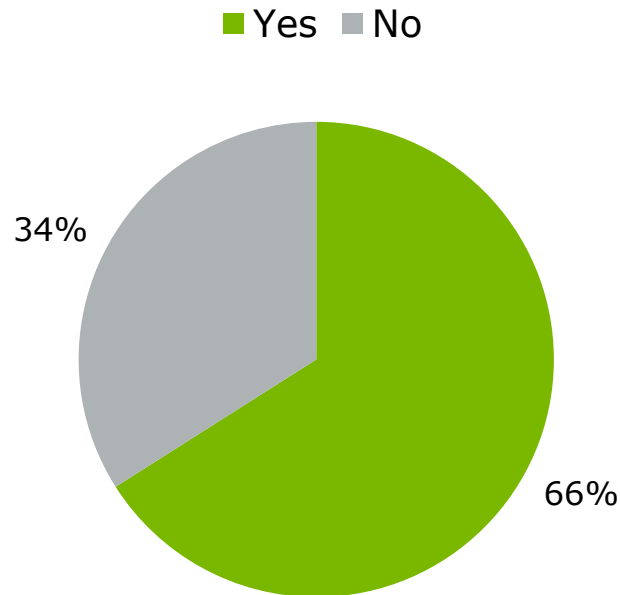
Where/how was your hearing tested?



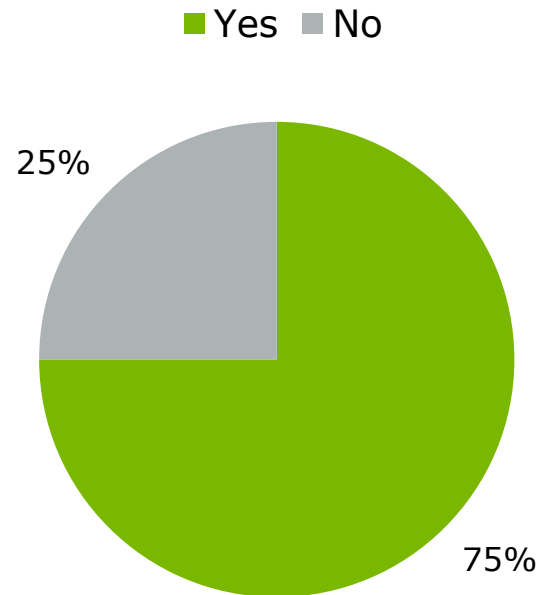
Base= 3'899

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

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



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



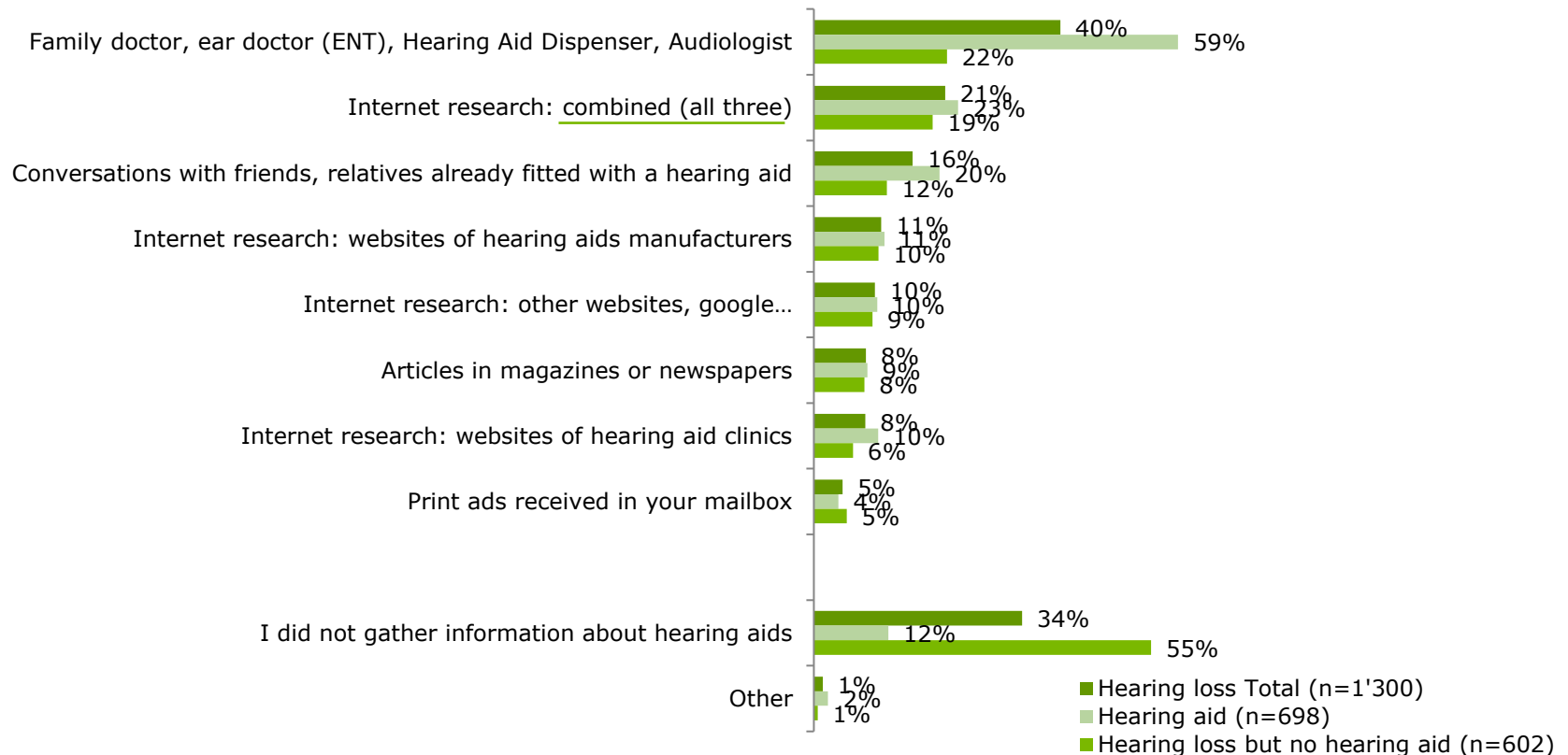
Base=4'006

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

Doctors and hearing care professionals are the most important sources of information and therefore the major gatekeepers – followed by internet research and other people with hearing aids.

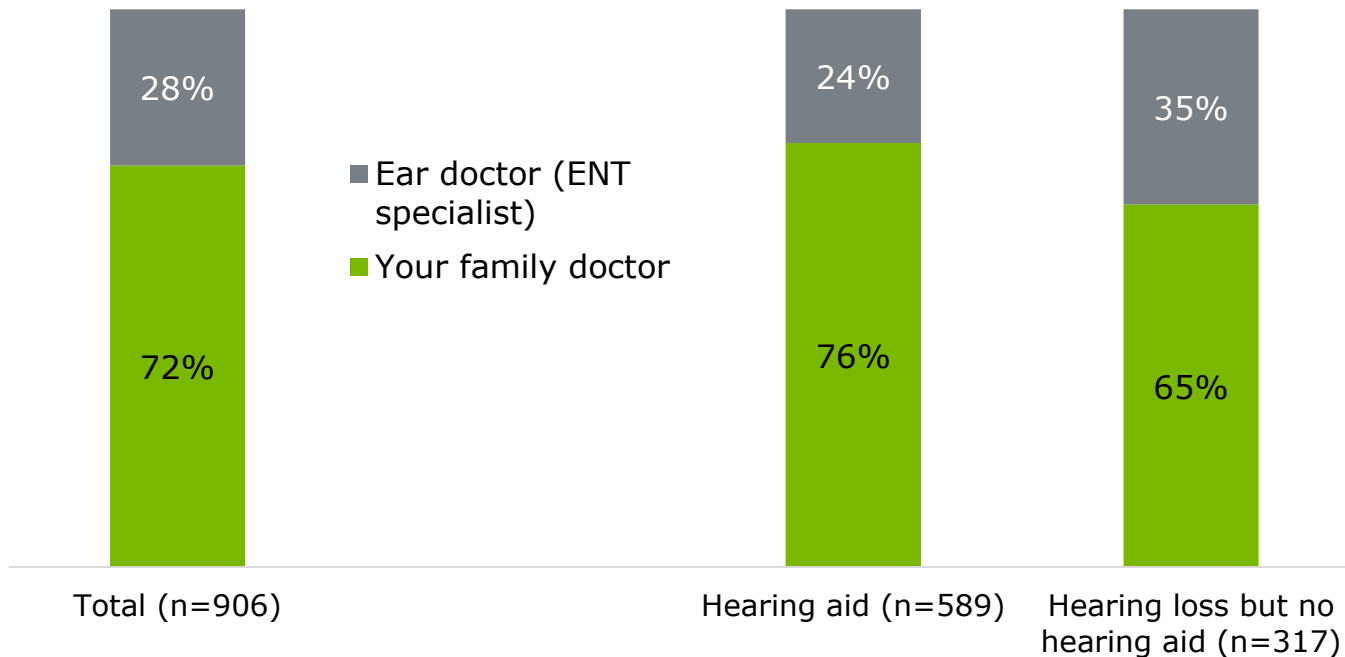
Where did you gather information about hearing aids?  
Please check all that apply.



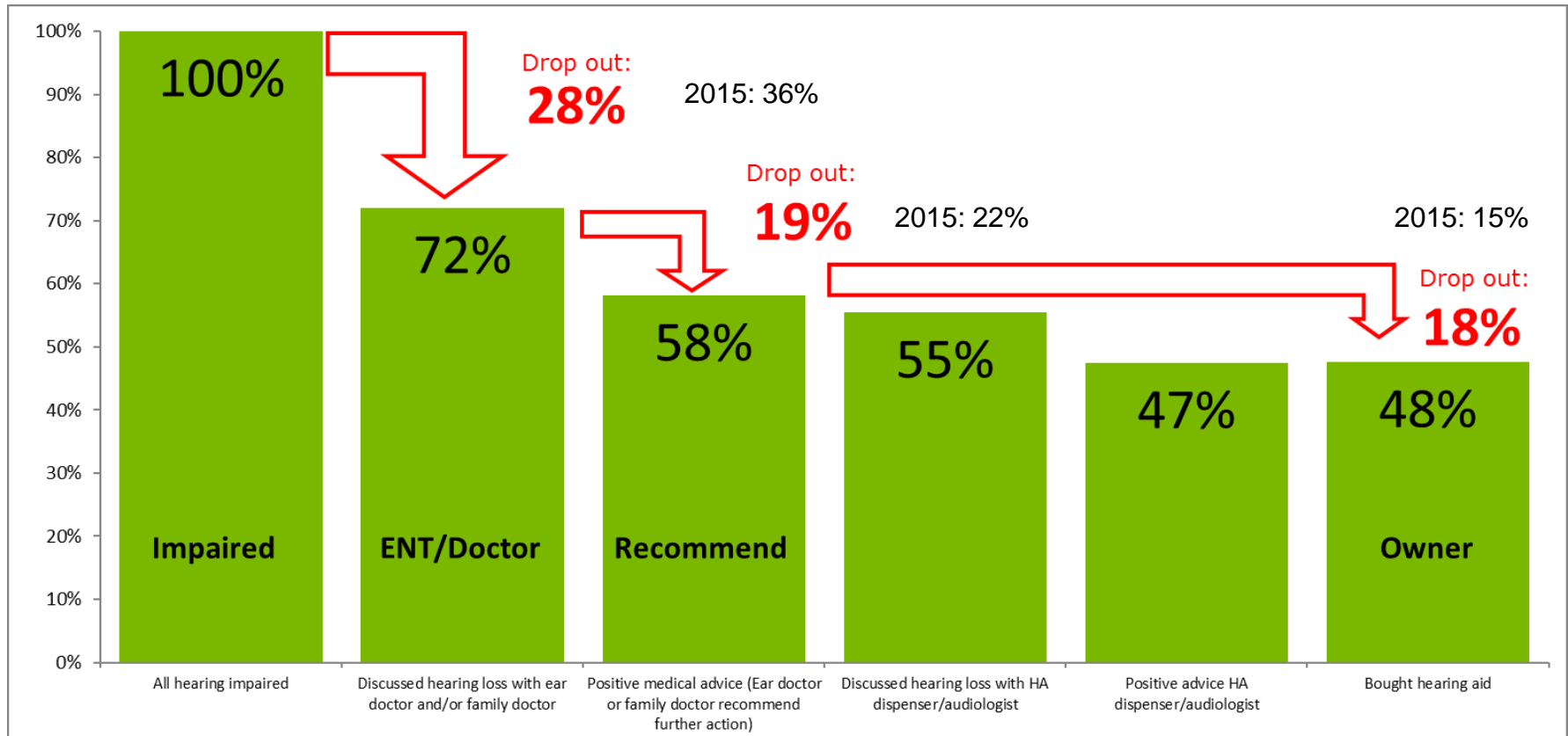
# Of those who discussed the hearing loss with a doctor, 72% talked to a family doctor (GP) first and 28% talked to an ENT first

Those who discussed hearing loss with family doctor and/or ENT:

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



# The route to the hearing aid: Compared to 2015 drop out 1 was reduced

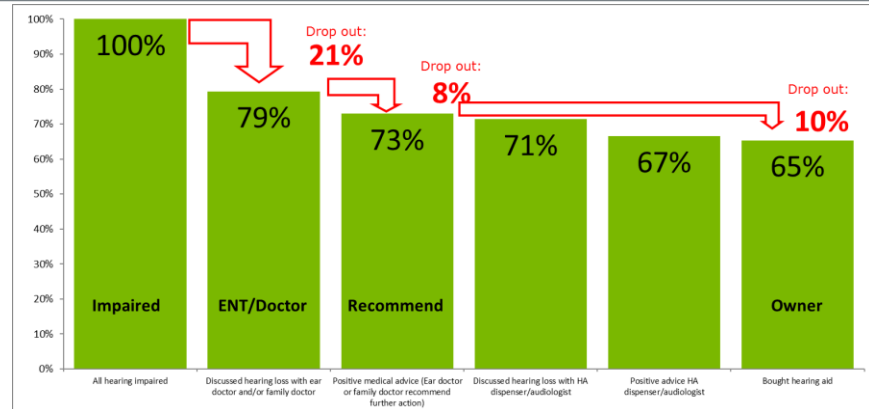


Base: n=1'300

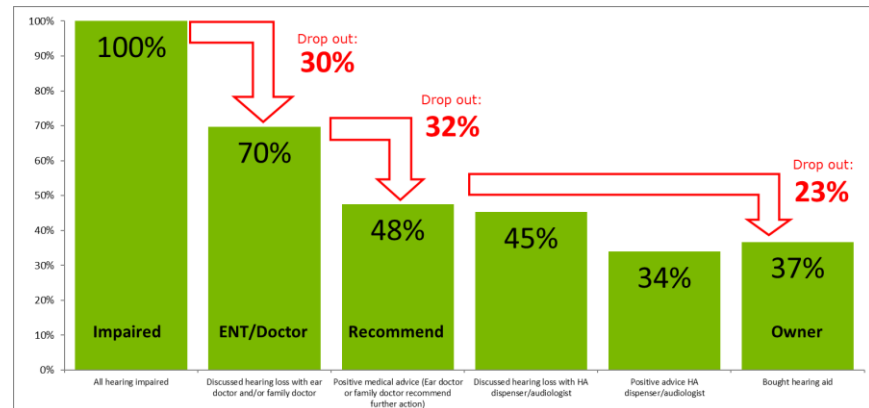


# Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss\*



Low 50% hearing loss\*



Base: n=1'300

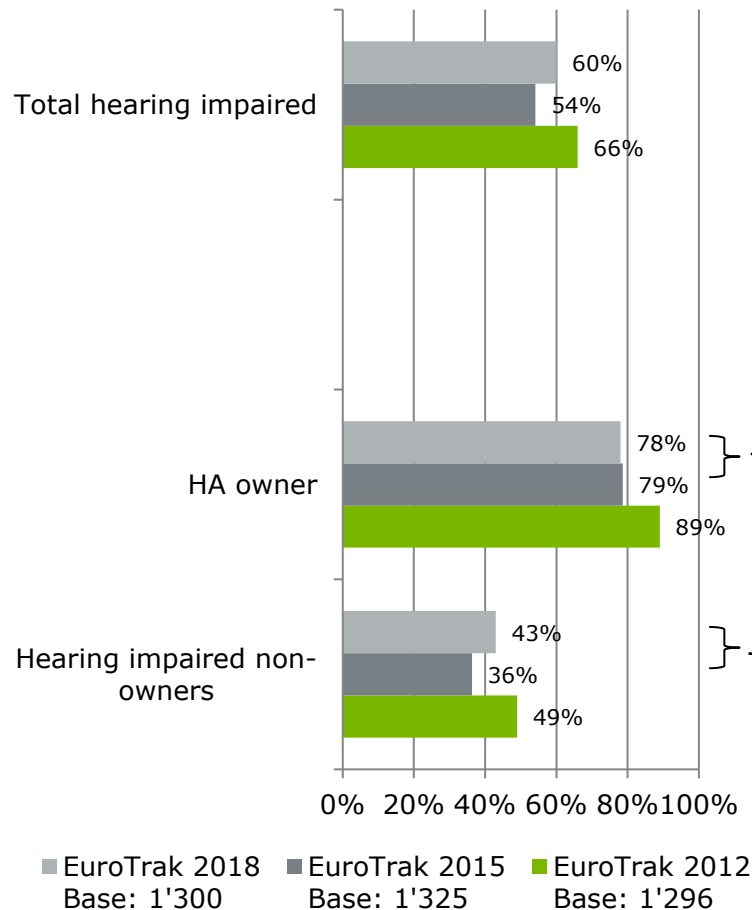
\* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

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

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

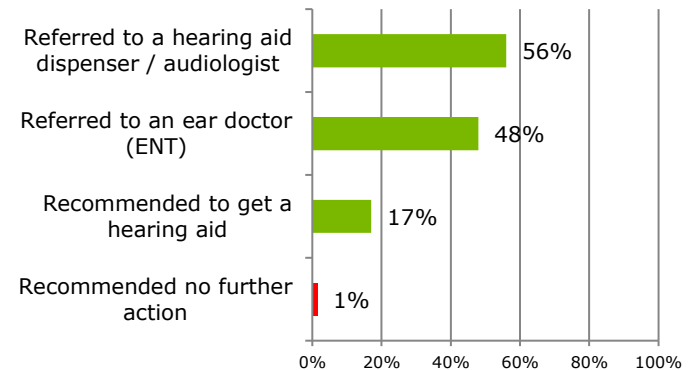
Have you discussed your hearing problem with your family doctor?

## % Discussed with GP

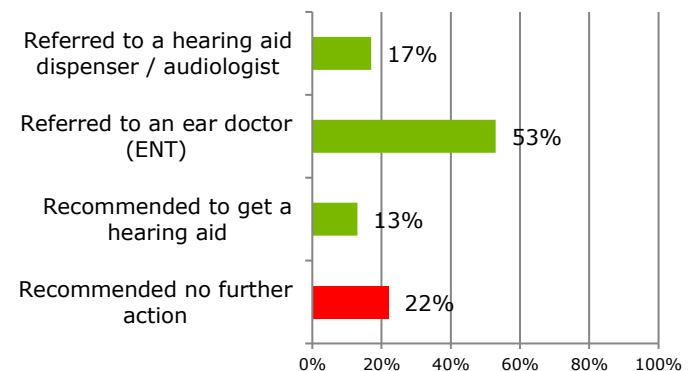


## What did he/she recommend ?

### HA owner (Base: 471)

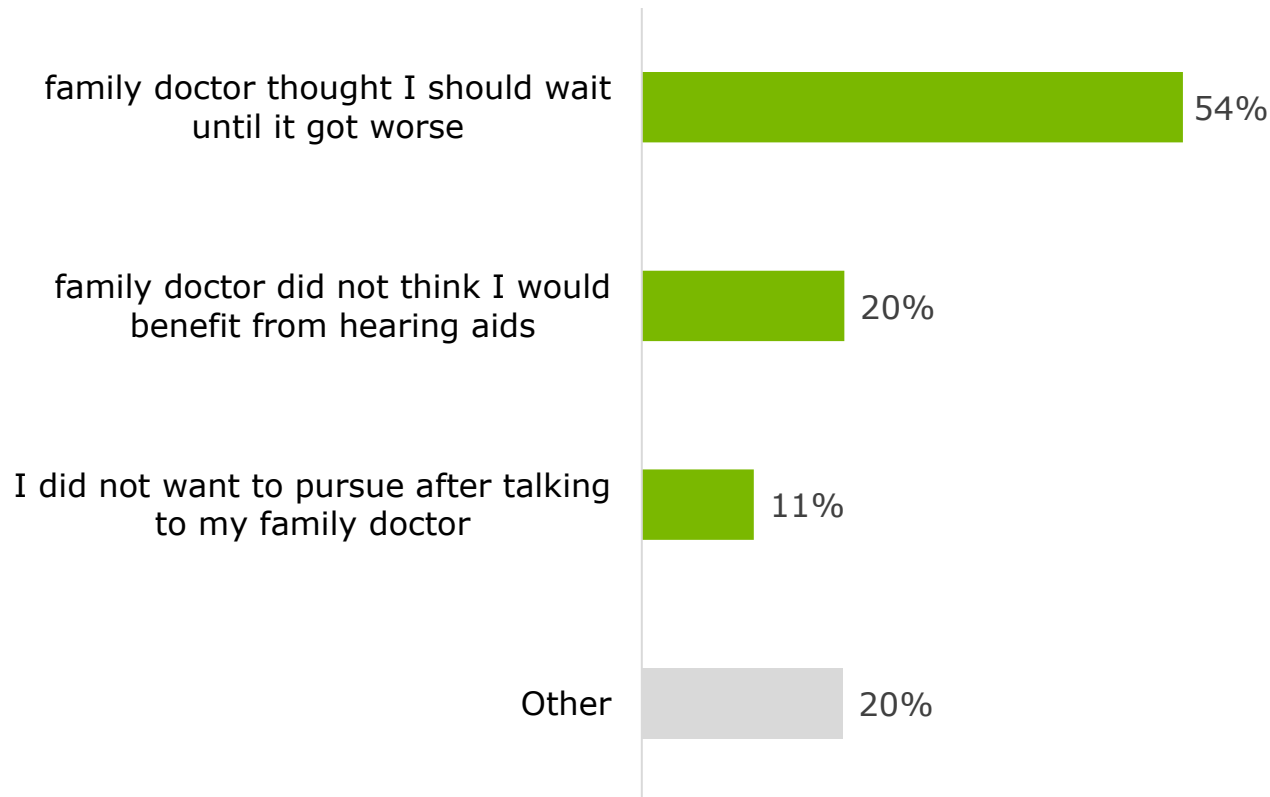


### Impaired non-owner (Base: 270)



Main reason for GP not recommending further action are that they think one should wait until hearing gets worse

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

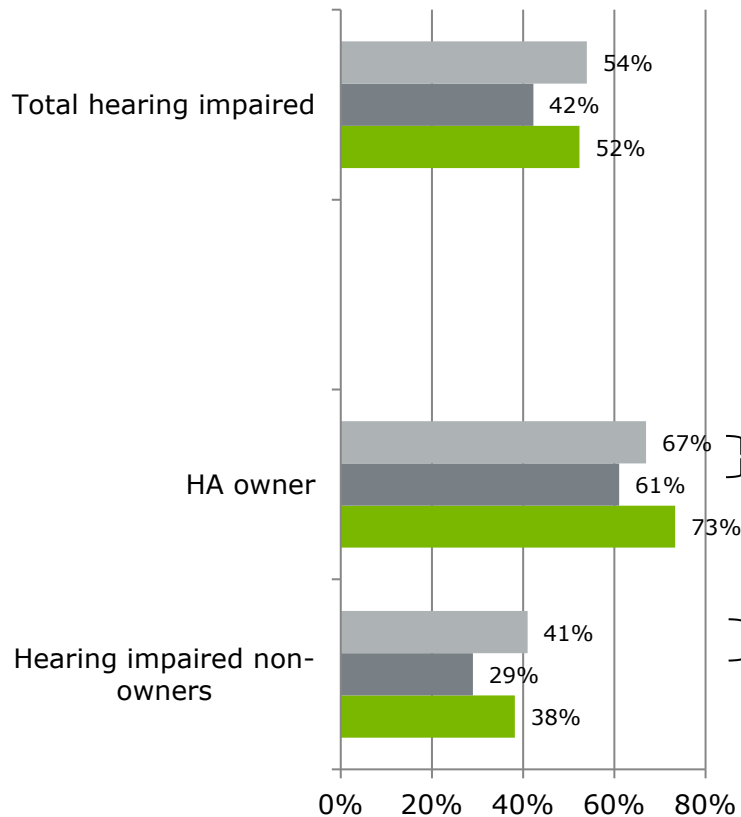


Base: n=58

# The route to the hearing aid: ENT

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

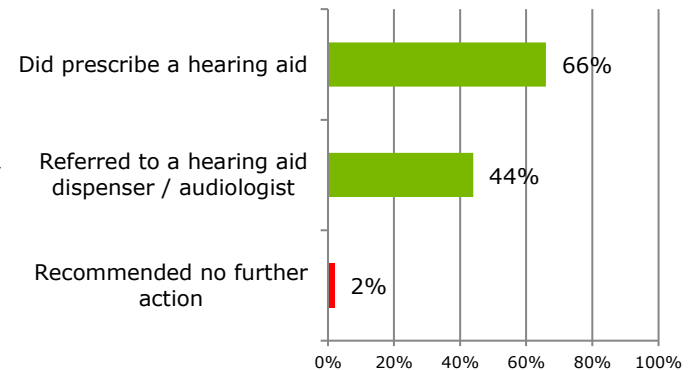
**% Discussed with ENT**



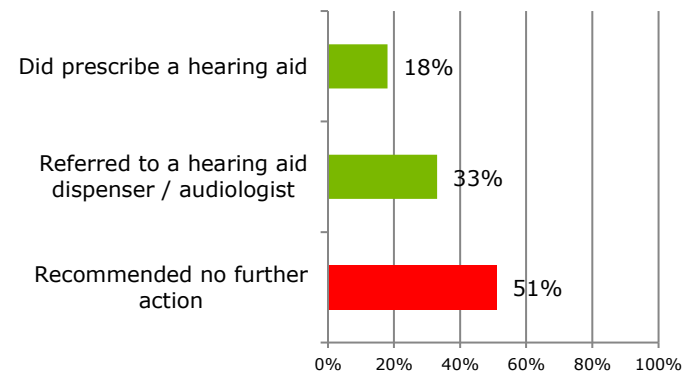
■ EuroTrak 2018 Base: 1'300  
 ■ EuroTrak 2015 Base: 1'325  
 ■ EuroTrak 2012 Base: 1'296

**What did he/she recommend ?**

**HA owner (Base: 400)**



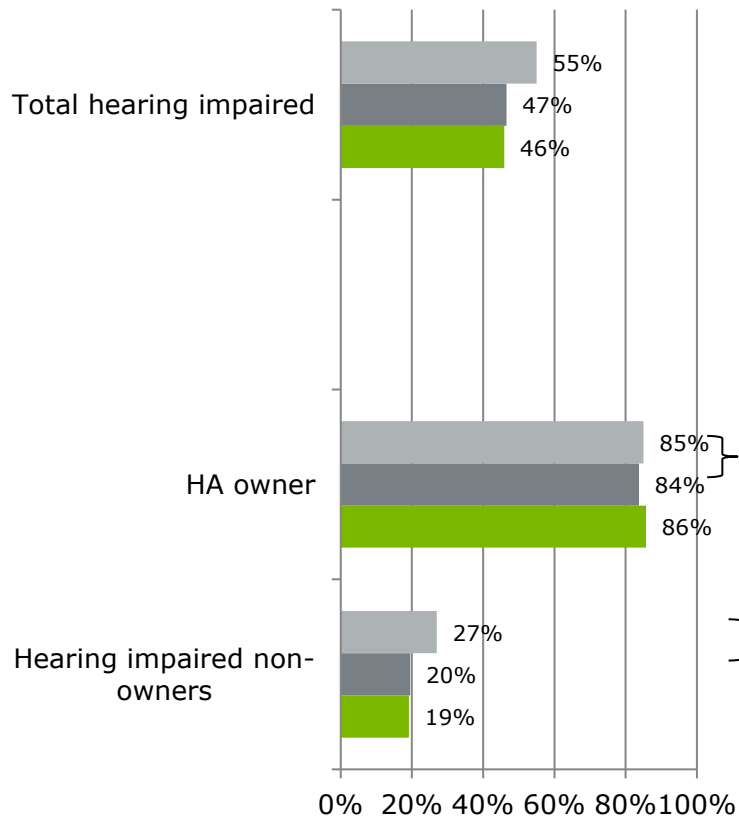
**Impaired non-owner (Base: 260)**



# The route to the hearing aid: HA dispenser

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

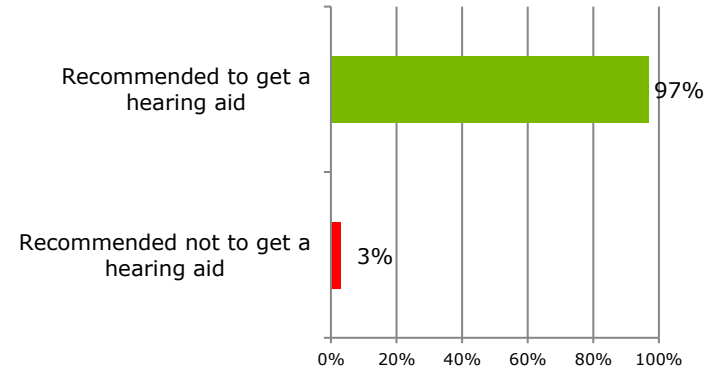
**% Discussed with Audiologist**



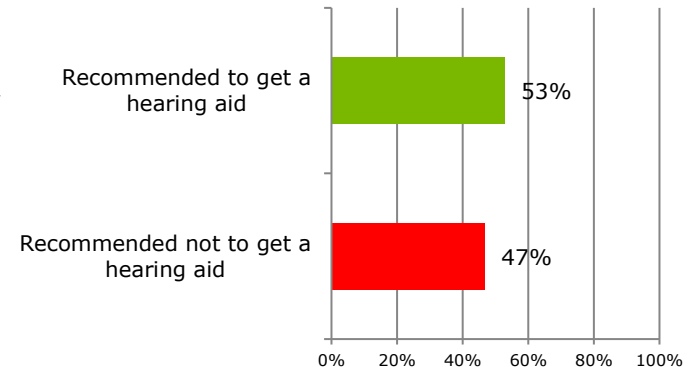
■ EuroTrak 2018 Base: 1'300  
 ■ EuroTrak 2015 Base: 1'325  
 ■ EuroTrak 2012 Base: 1'296

**What did he/she recommend ?**

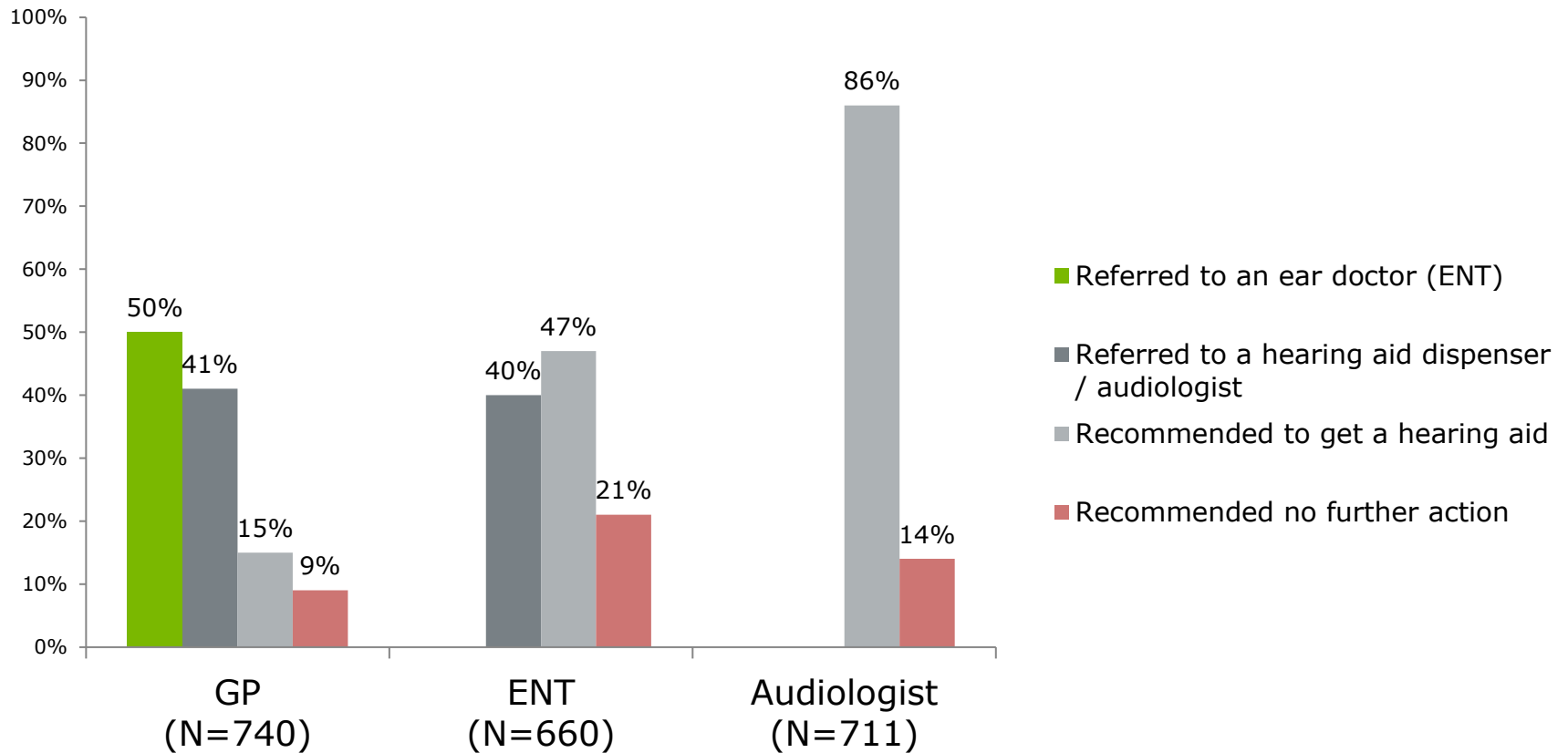
**HA owner (Base: 551)**



**Impaired non-owner (Base: 160)**



# Recommendations by profession

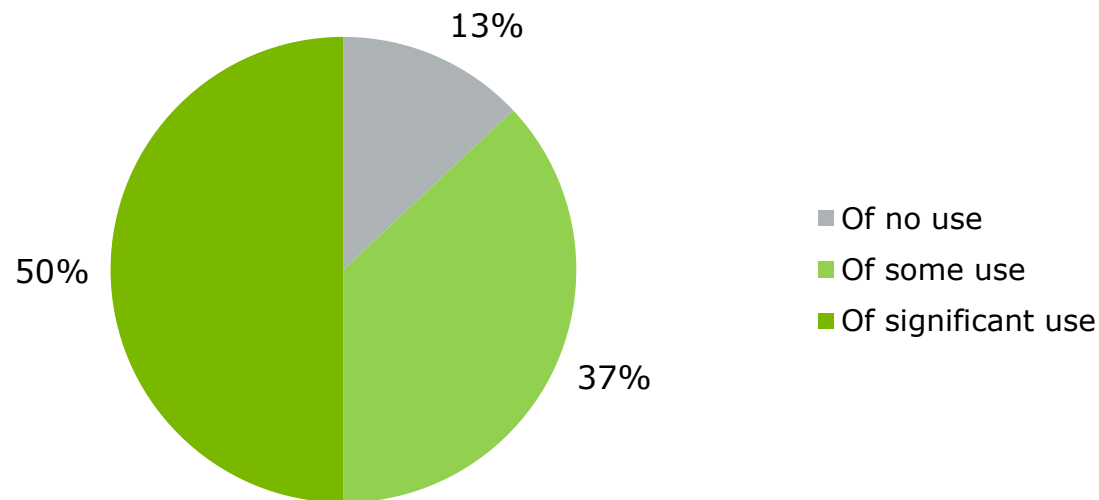


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Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities

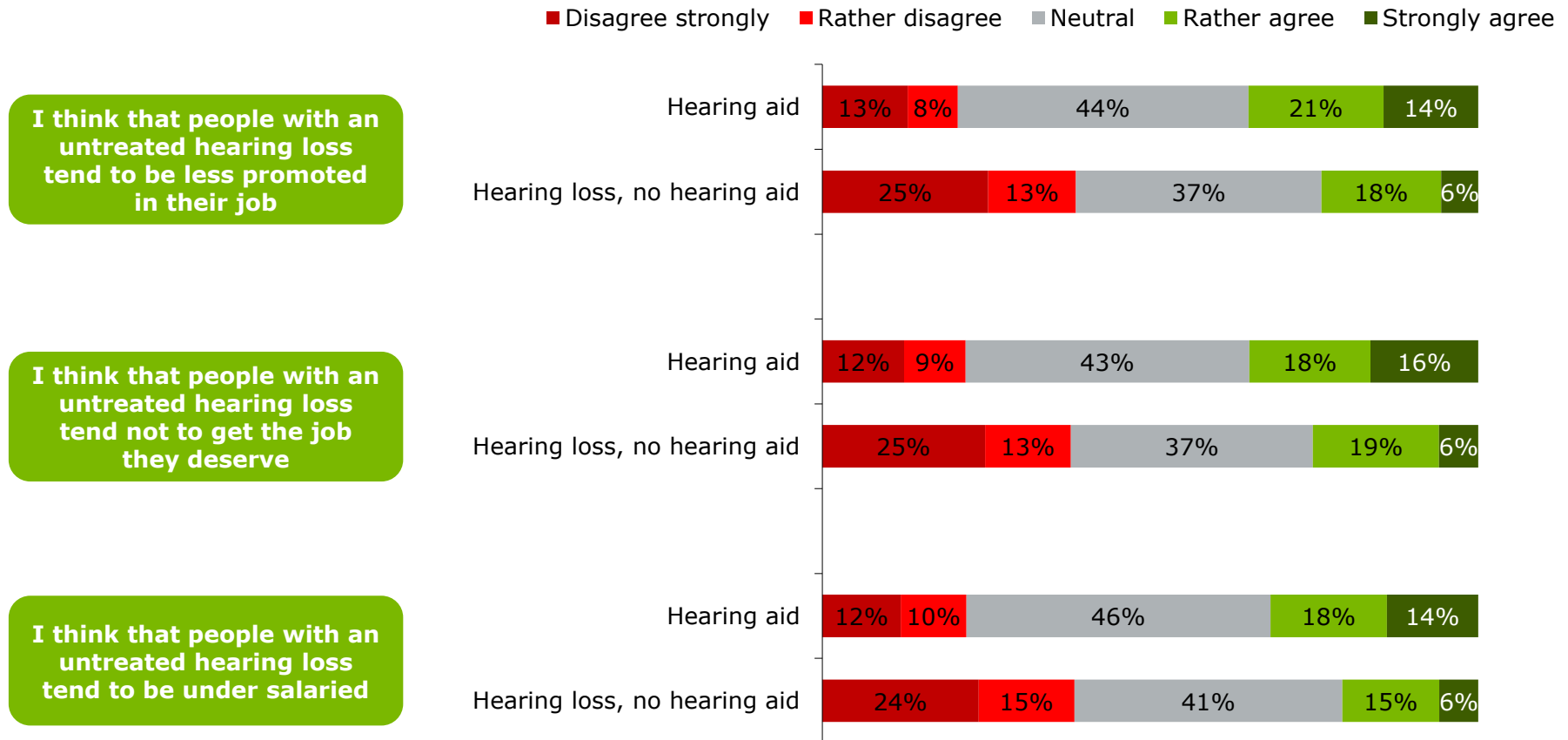
**Work competitiveness:** 87% of the working hearing aid owners state their hearing aid(s) are useful on their job.

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





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



Base: Hearing loss, no hearing aid =442/ hearing aid n=479

**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:

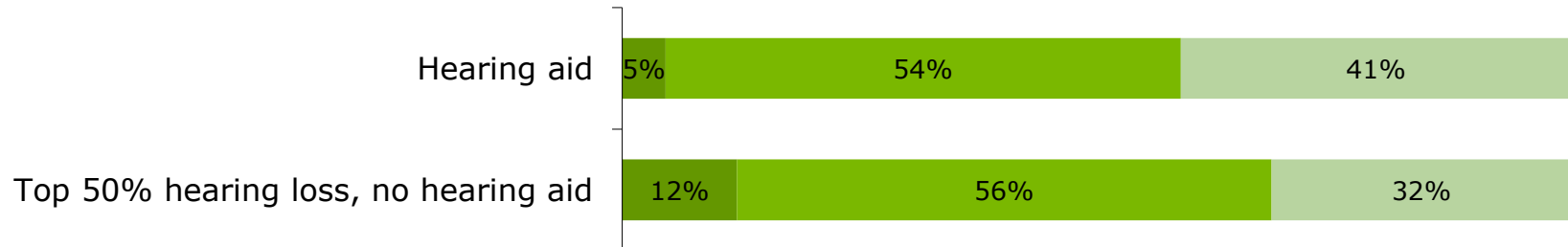
PHQ-2 Screening:

In the last 2 weeks:

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

Probability of major depressive disorder

■ very high      ■ medium      ■ very low



Base: hearing aid n=431 / no hearing aid =105

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

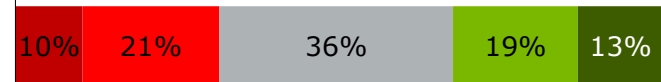
- Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
  - Scores on 6 APHAB-EC – like questions (Scaled 1-5)
  - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67%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

## General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top 50% hearing loss\*), hearing aid owners feel less exhausted in the evenings

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

In the evenings I often feel physically exhausted

Hearing aid



Top 50% hearing loss, no hearing aid

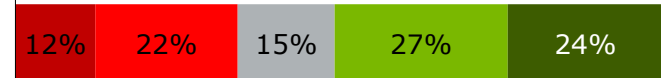


In the evenings I often feel mentally exhausted

Hearing aid



Top 50% hearing loss, no hearing aid



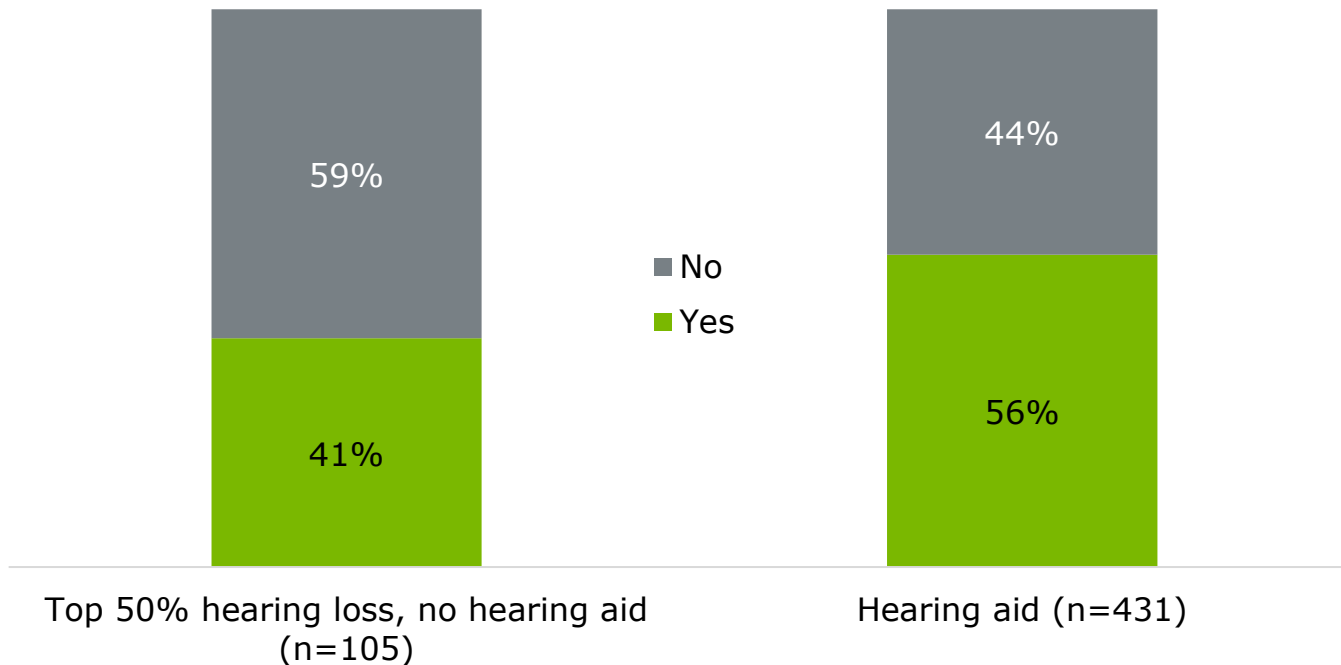
Base : Top 50% n=104 / hearing aid n=425

\*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).

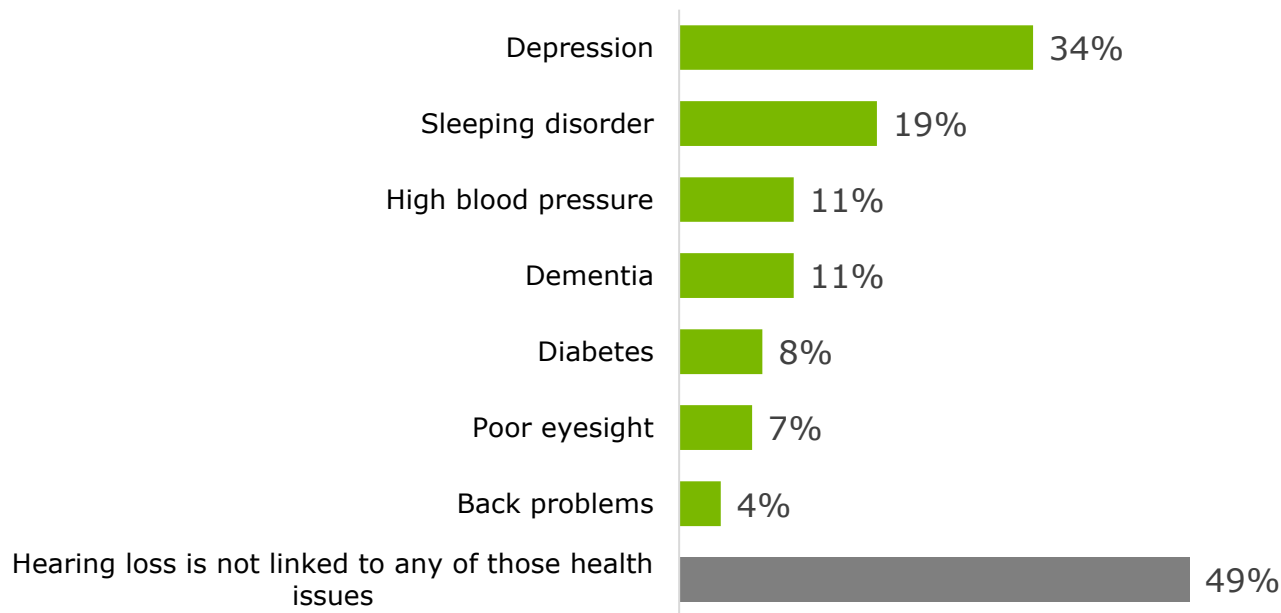
# General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?



# 34% 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.



Hearing impaired, N=1'260

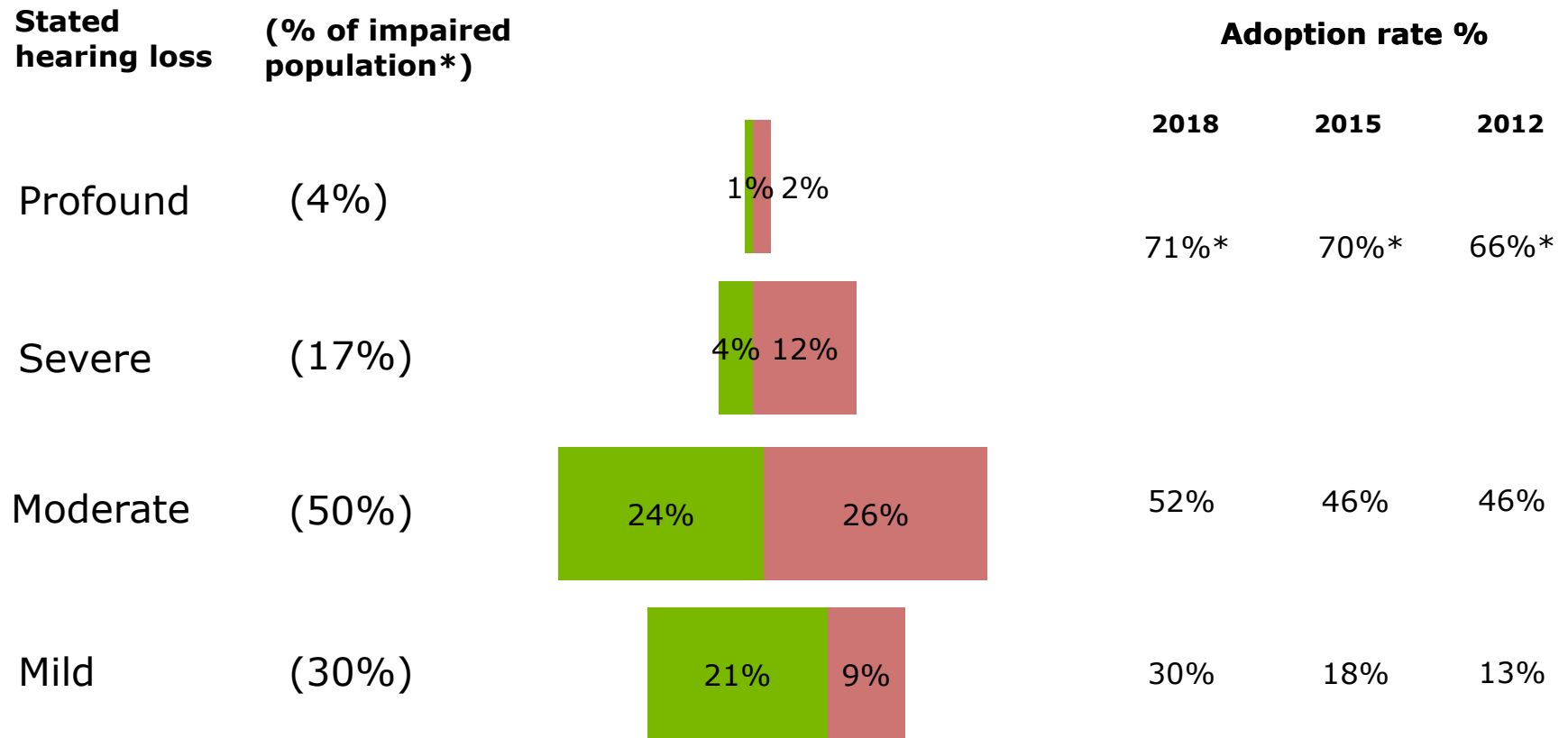
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## 3. Analysis of hearing aid owners

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Hearing aid ownership, awareness of hearing loss  
before getting hearing aids, lifetime of hearing aids  
and usage

# Adoption rates within mild and moderate hearing loss have increased



Base: n=1'300

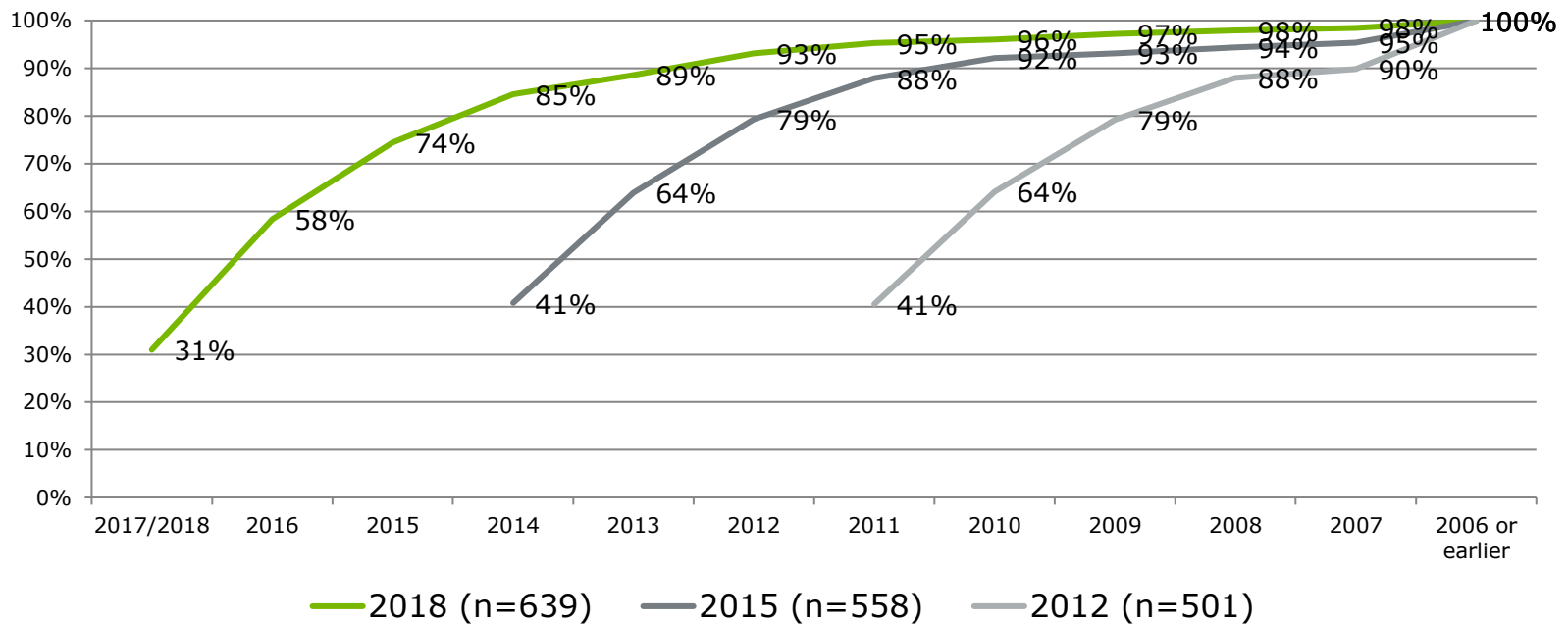
Sums can differ from 100% due to rounding

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



# 74% of the currently owned HAs were fitted in 2015 or later

## Year of purchase



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

**2018: 2.3 years**

**2015: 2.1 years**

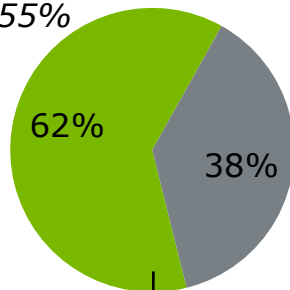
**2012: 2.1 years**

On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 4 years before they are being replaced.

Current HAs = first HAs?

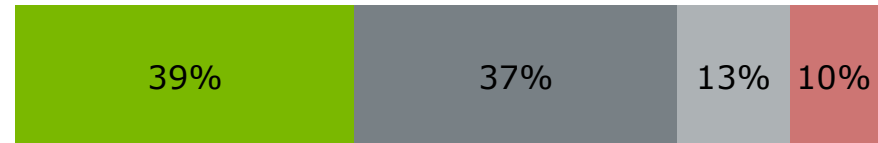
2015: 55%

■ Yes  
■ No



HA-owner, n=698

How many years did you own your previous HAs?



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

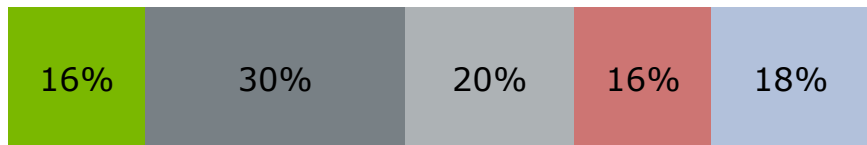
Base: n=220

Age of HA before it has been replaced:

2018: 4 years (median)

2015: 4 years (median)

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

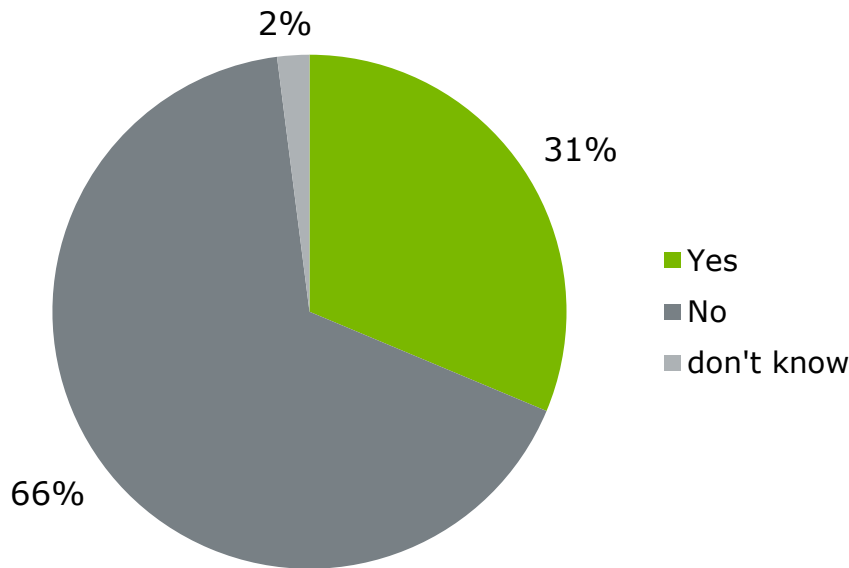


■ 1 year ■ 2 years ■ 3 years ■ 4-6 years ■ more than 6 years

Base: n=393

# 31% of all HA owners had their current HA repaired.

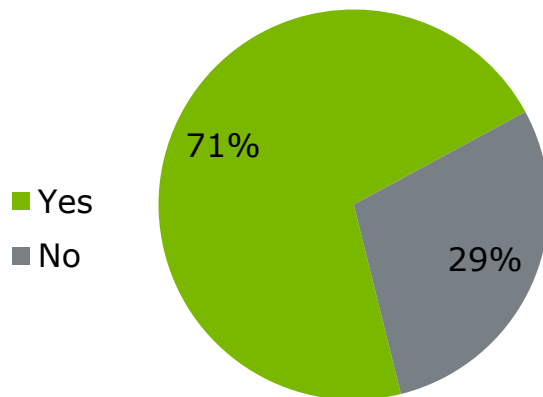
Have you ever had your hearing aid repaired?



Base: N=698

# 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?

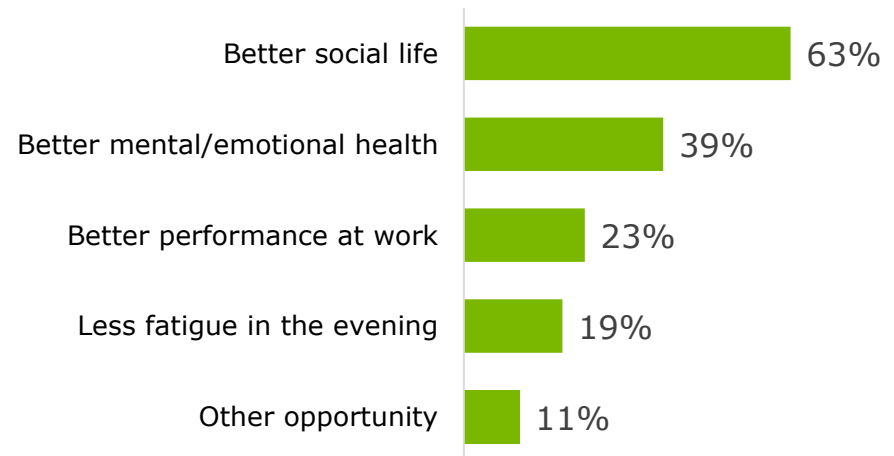


HA-owner, n=698

## 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?

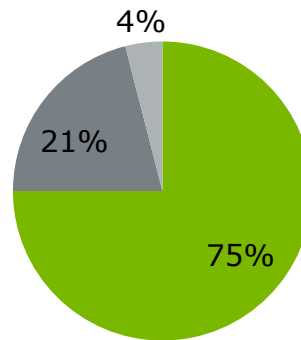
Please tick all that apply



Base: n=439

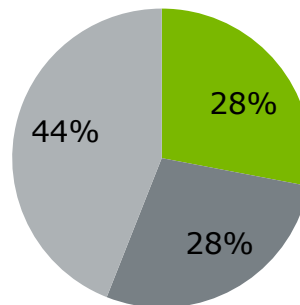
While a majority of hearing impaired without hearing aids don't know whether a third party would pay any part of hearing aids - 75% of the hearing aid owners received a free-of-charge NHS instrument

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



HA-owner, n=698

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

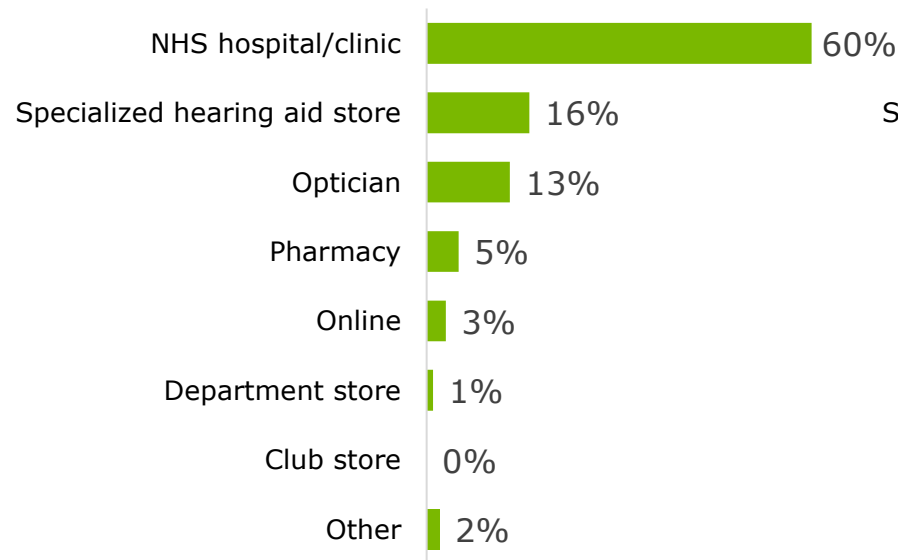


HA-non-owners, n=602

# NHS hospital /clinic is the preferred place for obtaining hearing aids (both for owners and non owners).

## OWNERS:

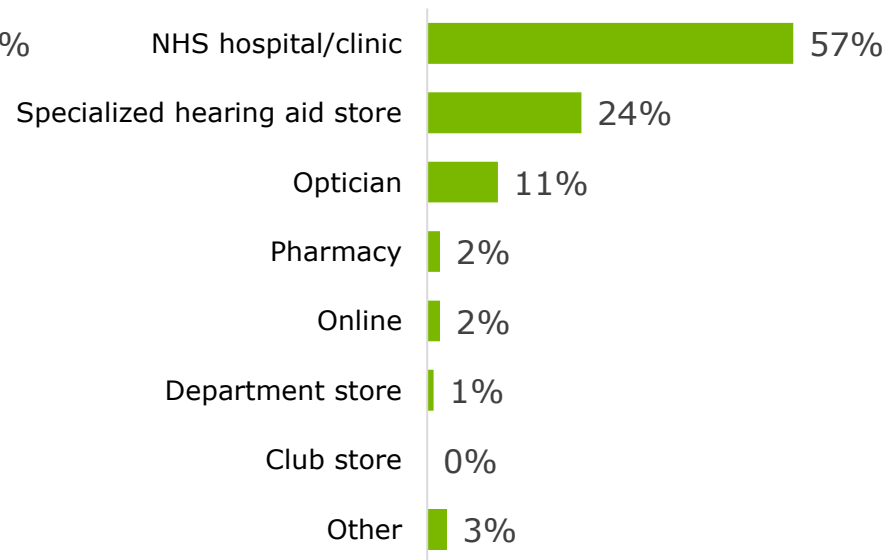
Where was your most current hearing aid obtained?



HA-owner, n=698

## NON OWNERS:

If you were to get hearing aids, where would you go?



HA-non-owner, n=602

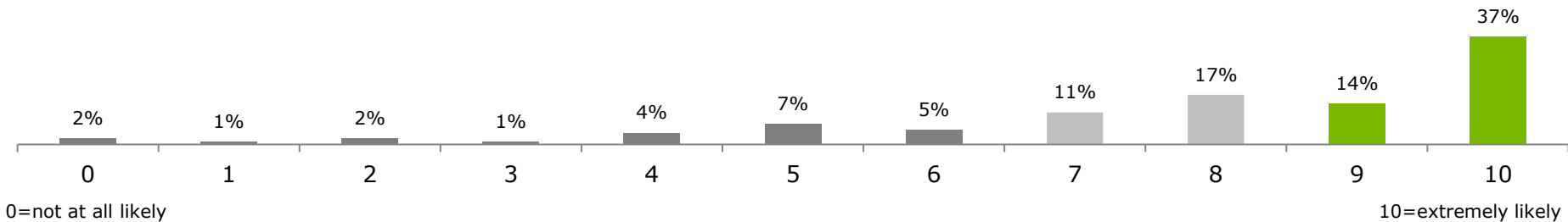
Recommendation intention of the place where the hearing aid(s) have been obtained is good, with a positive NPS score of 29.

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

**DETRACTORS**  
22%

**PASSIVES**  
27%

**PROMOTERS**  
51%

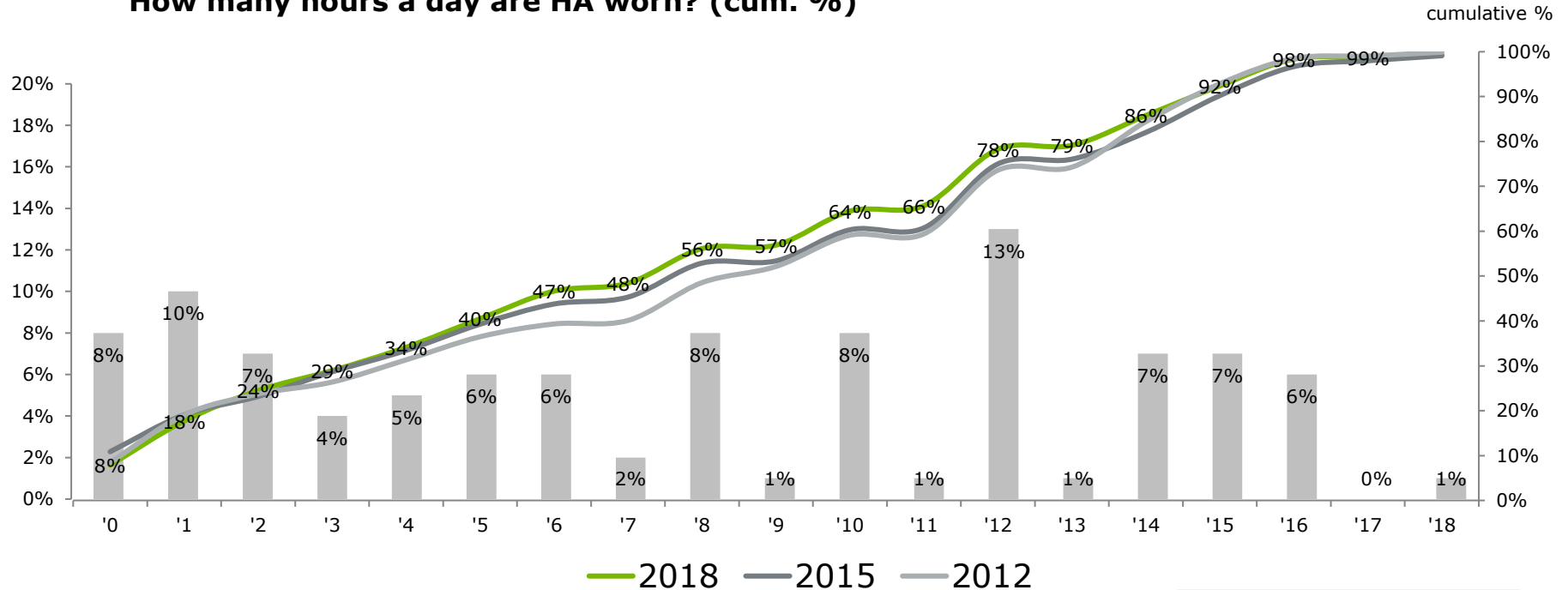


**NPS = PROMOTERS – DETRACTORS = 29**

HA-owner, n=698

# On average, HAs are worn 7.8 hours a day

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



**HA worn:**  
 2018 Mean: 7.8 hours/day  
 2015 Mean: 8.1 hours/day  
 2012 Mean: 8.3 hours/day

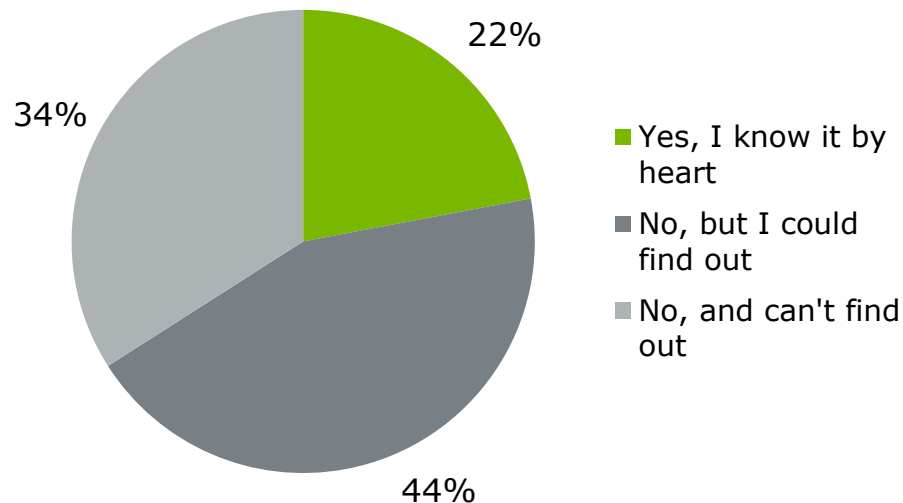
HA-owner:  
 2018: n=698  
 2015: n=605  
 2012: n=501



# Only 22% of today's hearing aid owners are aware of their hearing aid brand.

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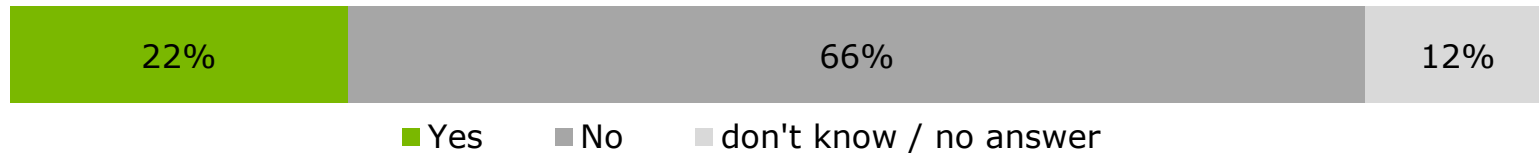
Are you aware of the brand of your hearing aid(s)?



Base: N=698

15% of the HA owners use an accessory for their hearing aids.  
77% 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=698)



**Do you personally use accessories for your hearing aids (TV-Streamer/ Apps / Remote Control / etc.) ?** (HA owners, n= 698)



*IF ACCESSORIES USED (n=109):*

HA owners, n=619

**Overall, how satisfied with the performance of your accessorie(s)?**

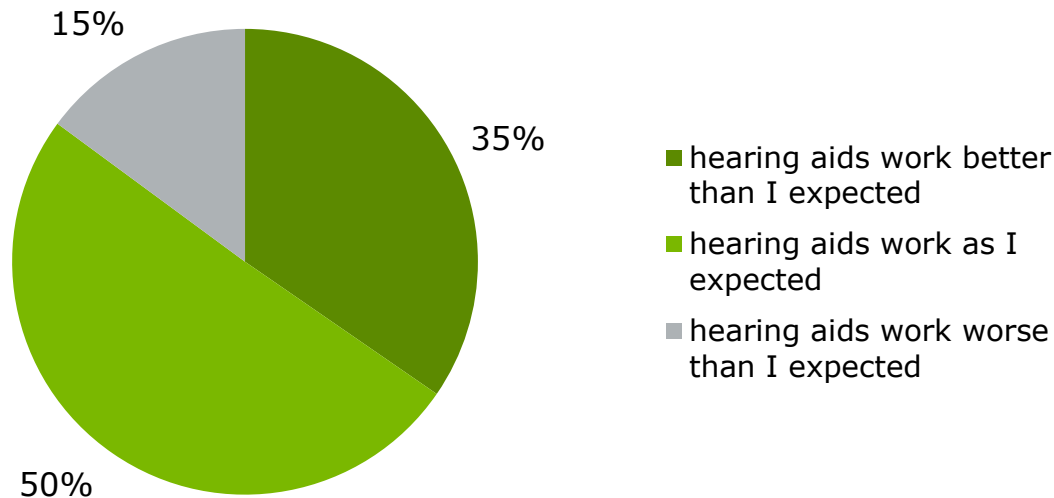


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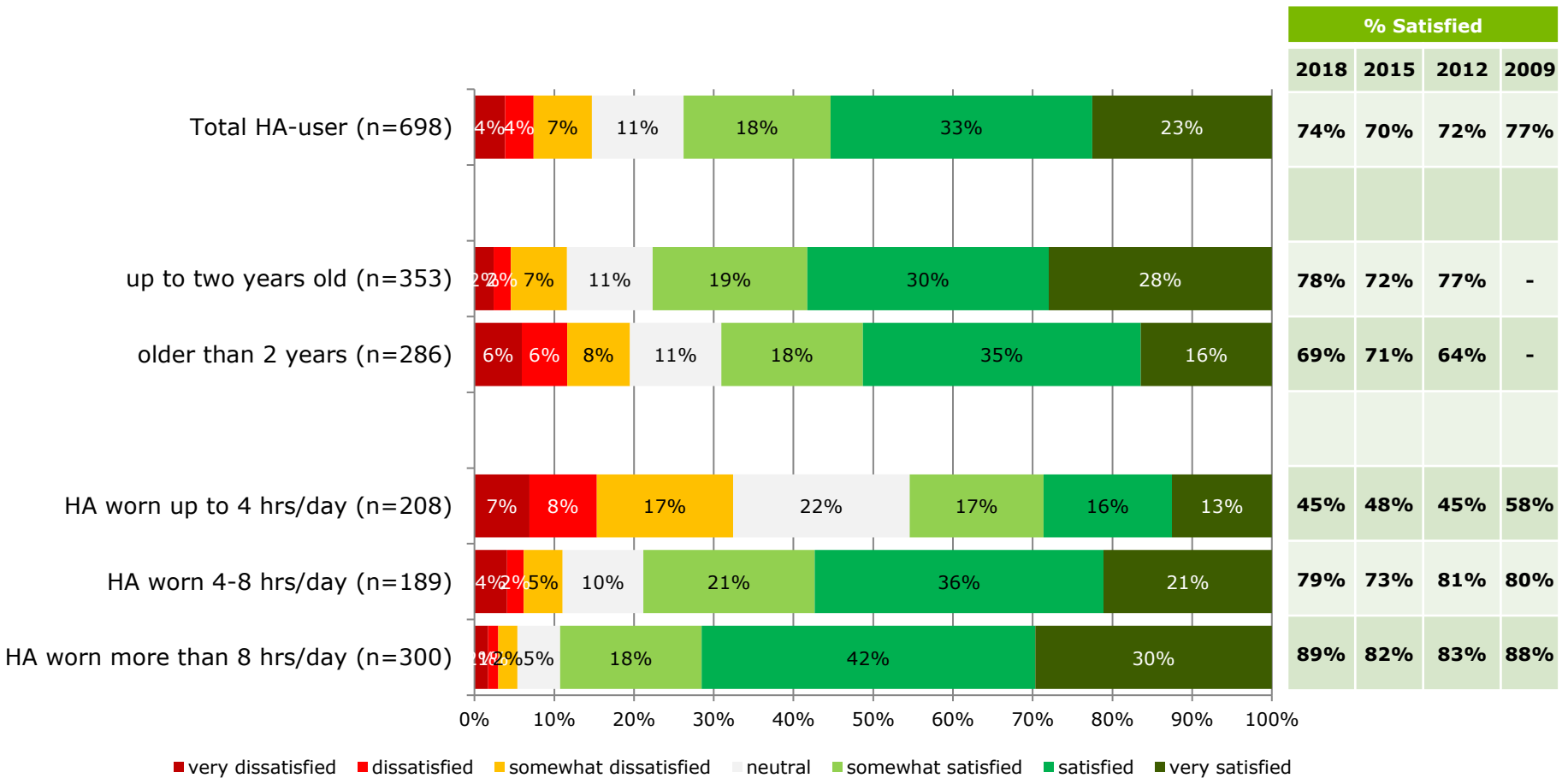
# Satisfaction with hearing aids and drivers

# 85% of the hearing aid owners say their hearing aid works better than or as expected

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



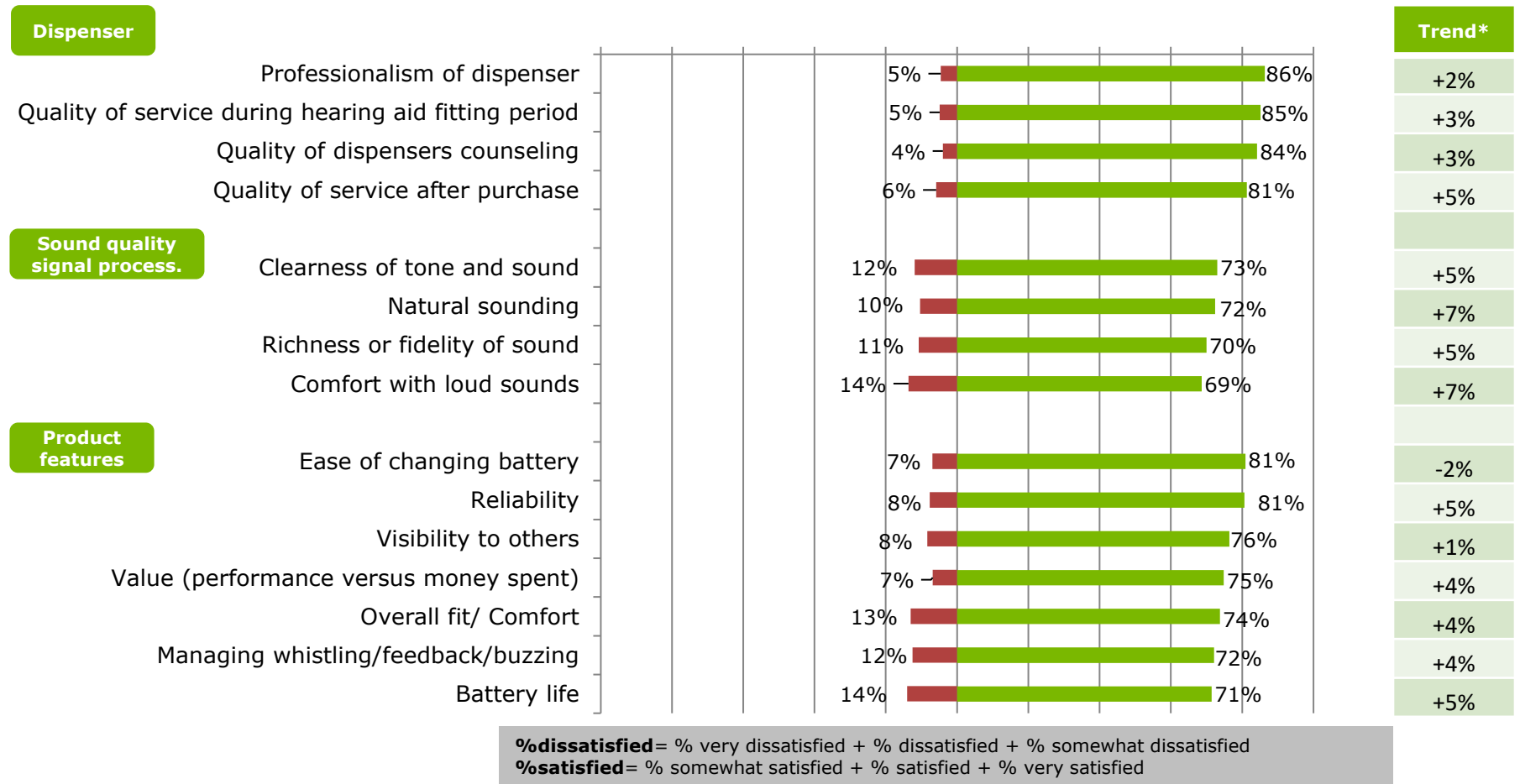
# Overall satisfaction with HA is 74% in the UK



# Overall Satisfaction with HA: Country comparison

	UK	Bel- gium	Nerther- lands	Poland	France	Switzer- land	Den- mark	Norway	Italy	Japan
Overall satisfaction 2012	72%	-	-	-	80%	84%	70%	72%	70%	36%
Overall satisfaction 2015/16/17	70%	80%	73%	80%	84%	81%	71%	-	79%	39%
Overall satisfaction 2018	74%									

# Satisfaction with current hearing aids

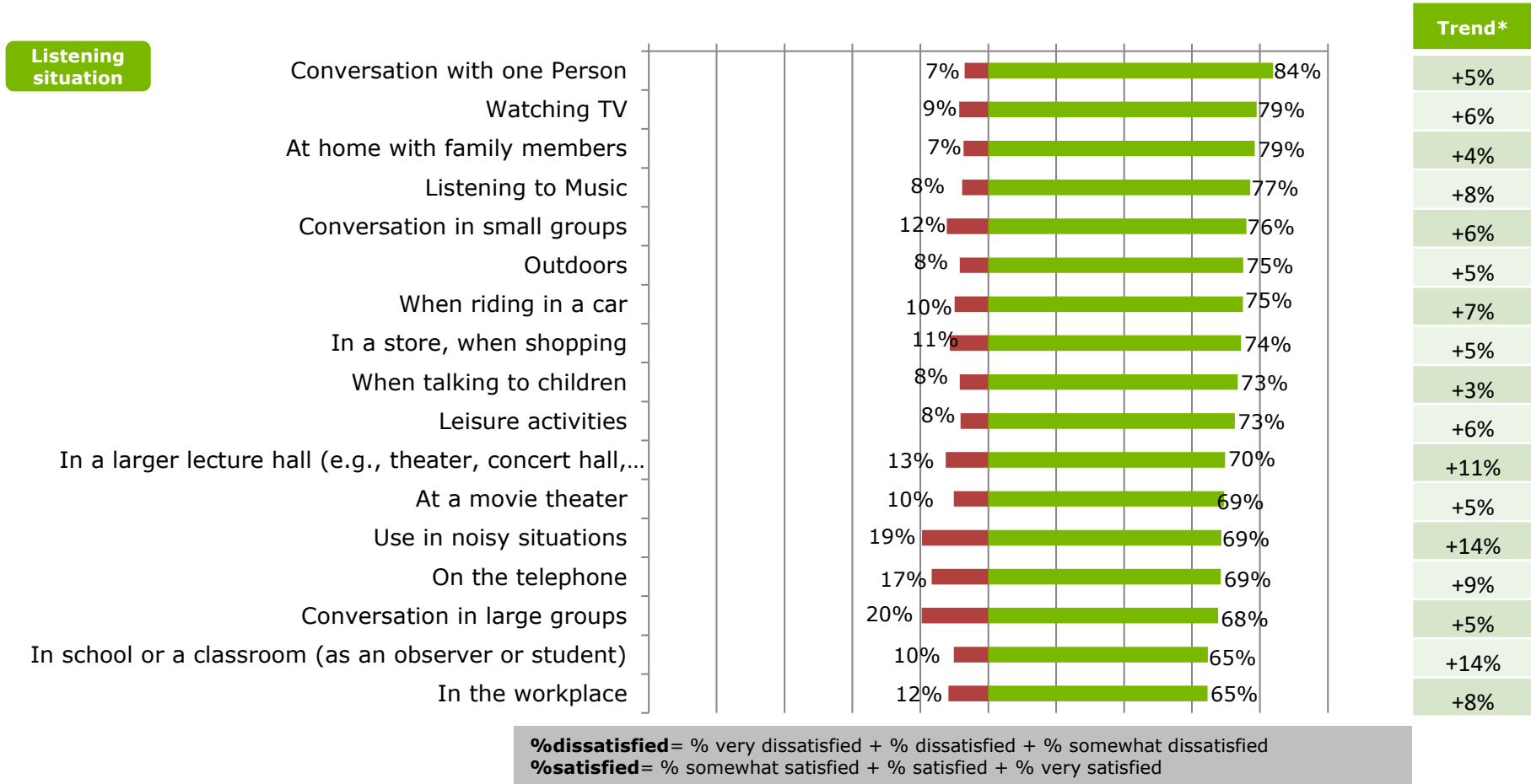


\* % of satisfied HA owners compared to EuroTrak 2015

■ dissatisfied ■ satisfied

HA-owner, n=698

# Satisfaction with current hearing aids



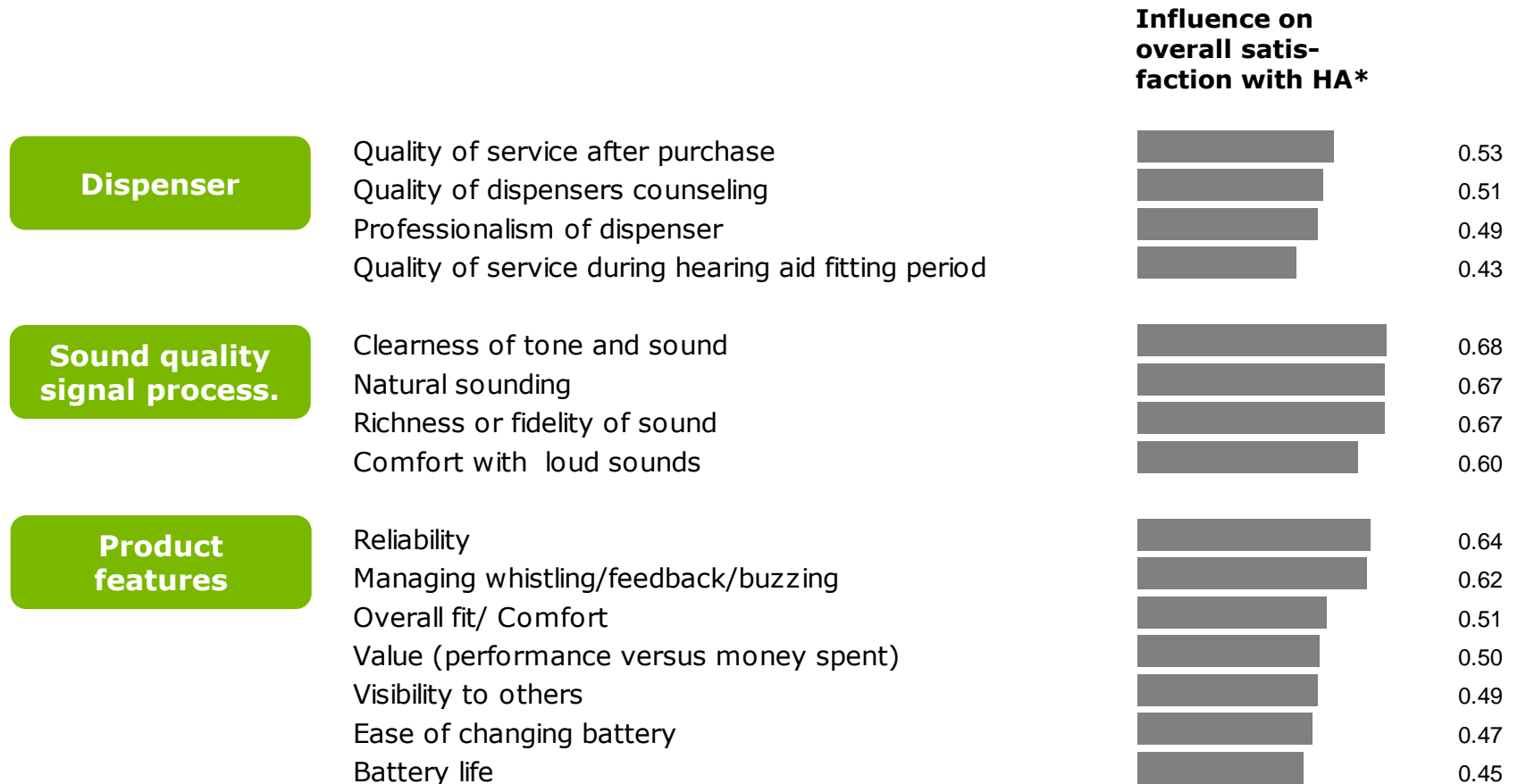
\* % of satisfied HA owners compared to EuroTrak 2015

■ dissatisfied ■ satisfied

HA-owner, n=698



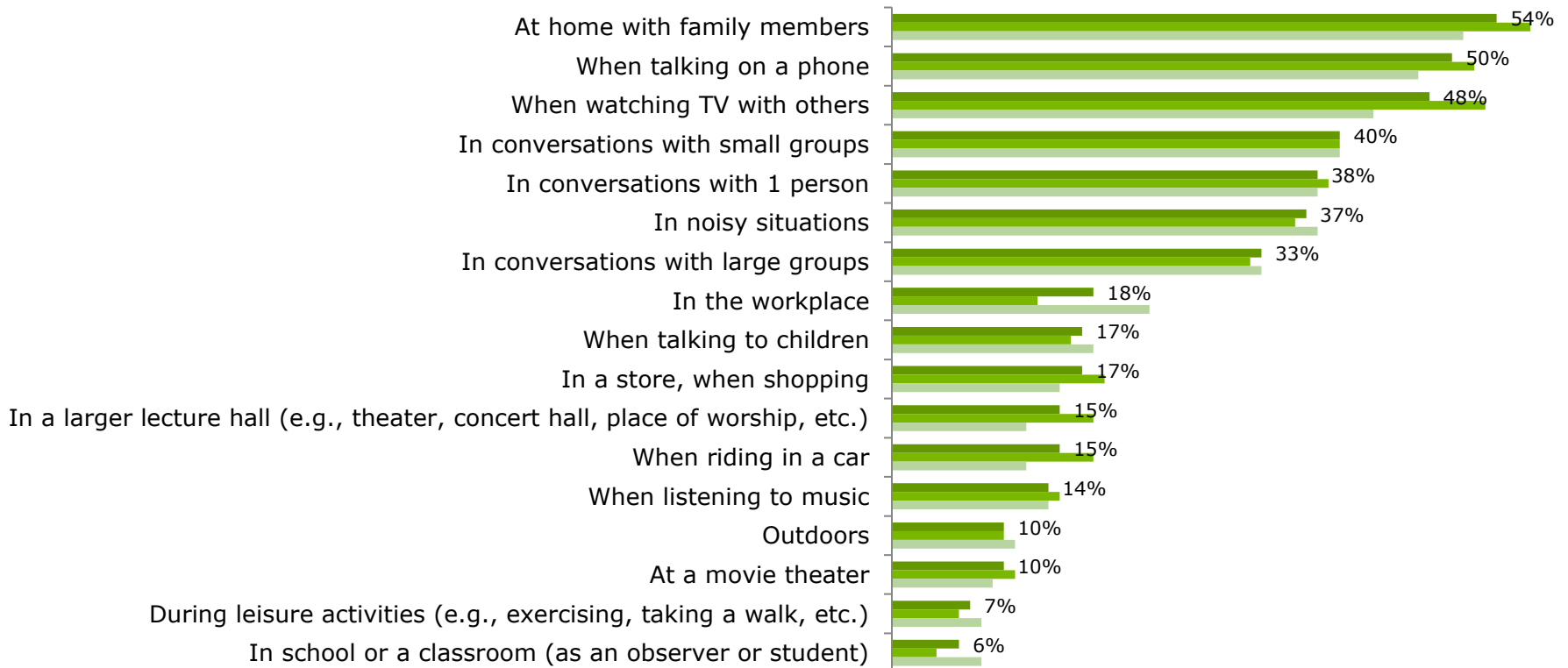
# Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA



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

# Important listening situations

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



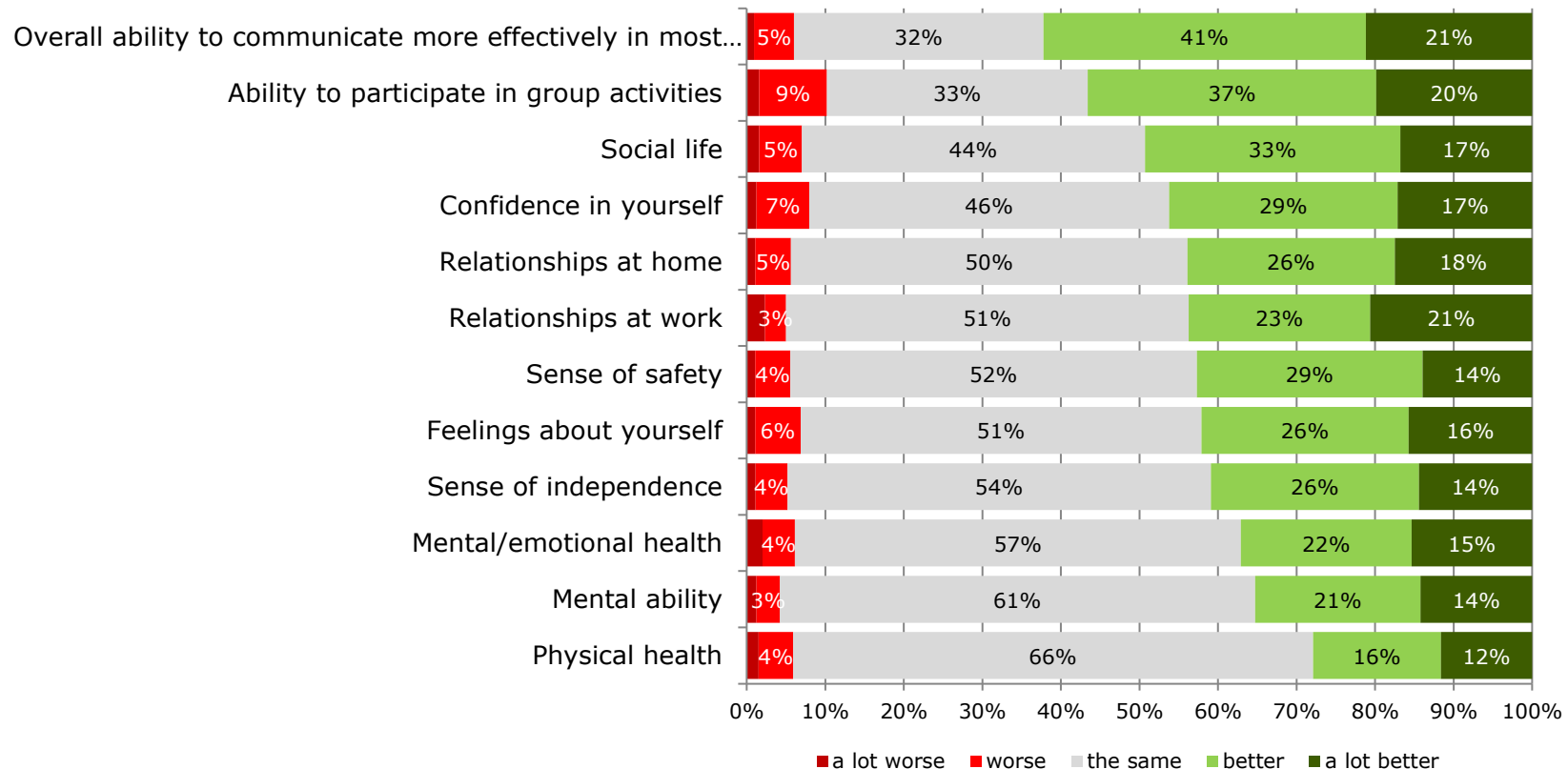
■ Hearing loss Total (n=1'300)  
 ■ Hearing aid (n=698)  
 ■ Hearing loss but no hearing aid (n=602)

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# Positive impact of hearing aids, quality of life

# Significant positive impact of HAs on different aspects: Especially communication effectiveness and participating in group activities improve with hearing aids.

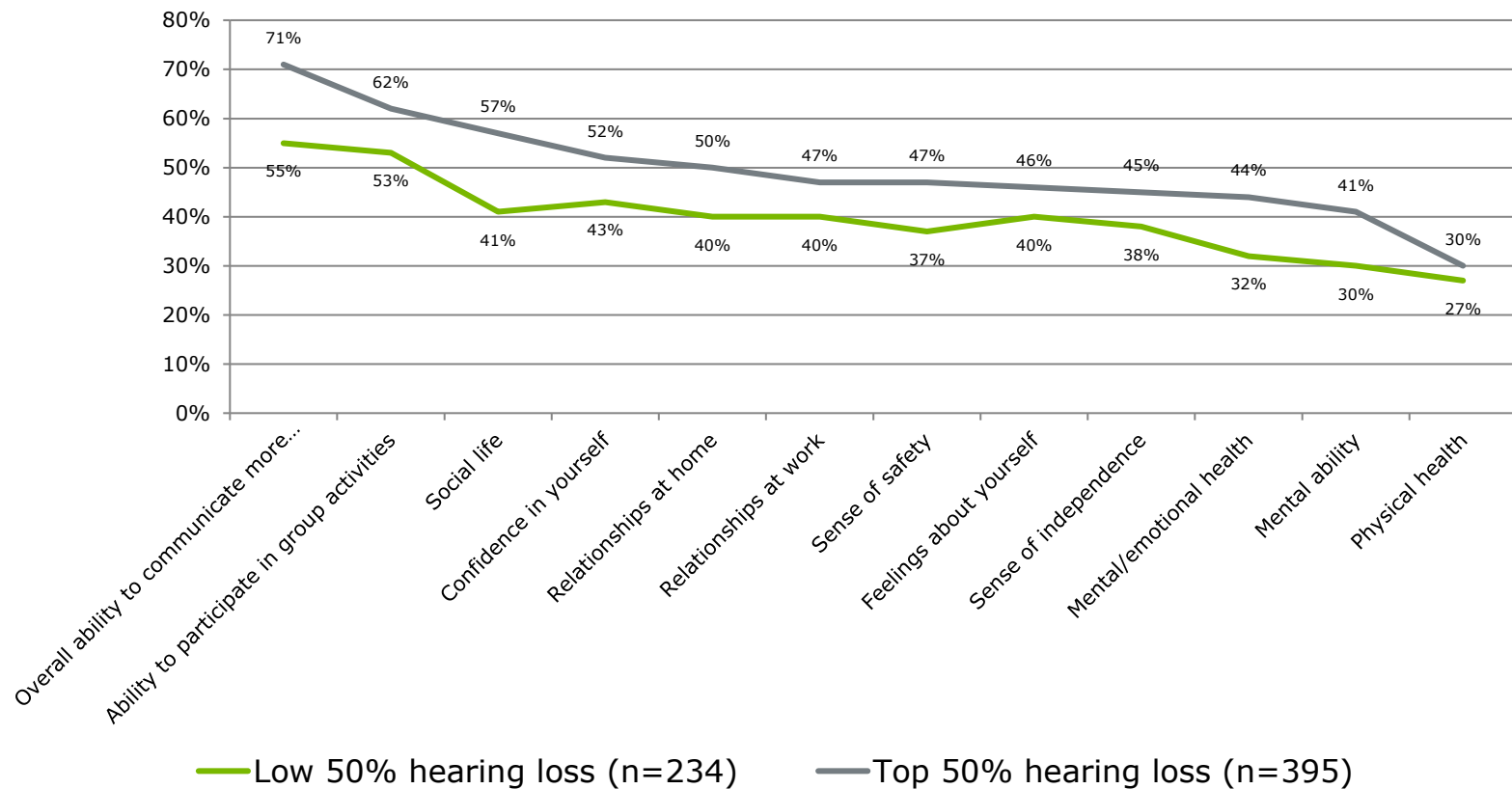
**Since you started using your hearing aid(s), please rate the changes you have experienced in each of the following areas, that you believe are due to your hearing aid(s).**



HA-owner, n=698

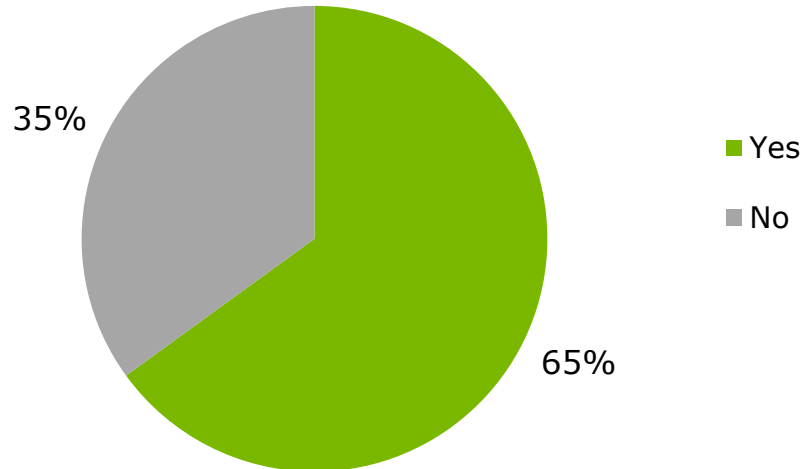
# Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

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



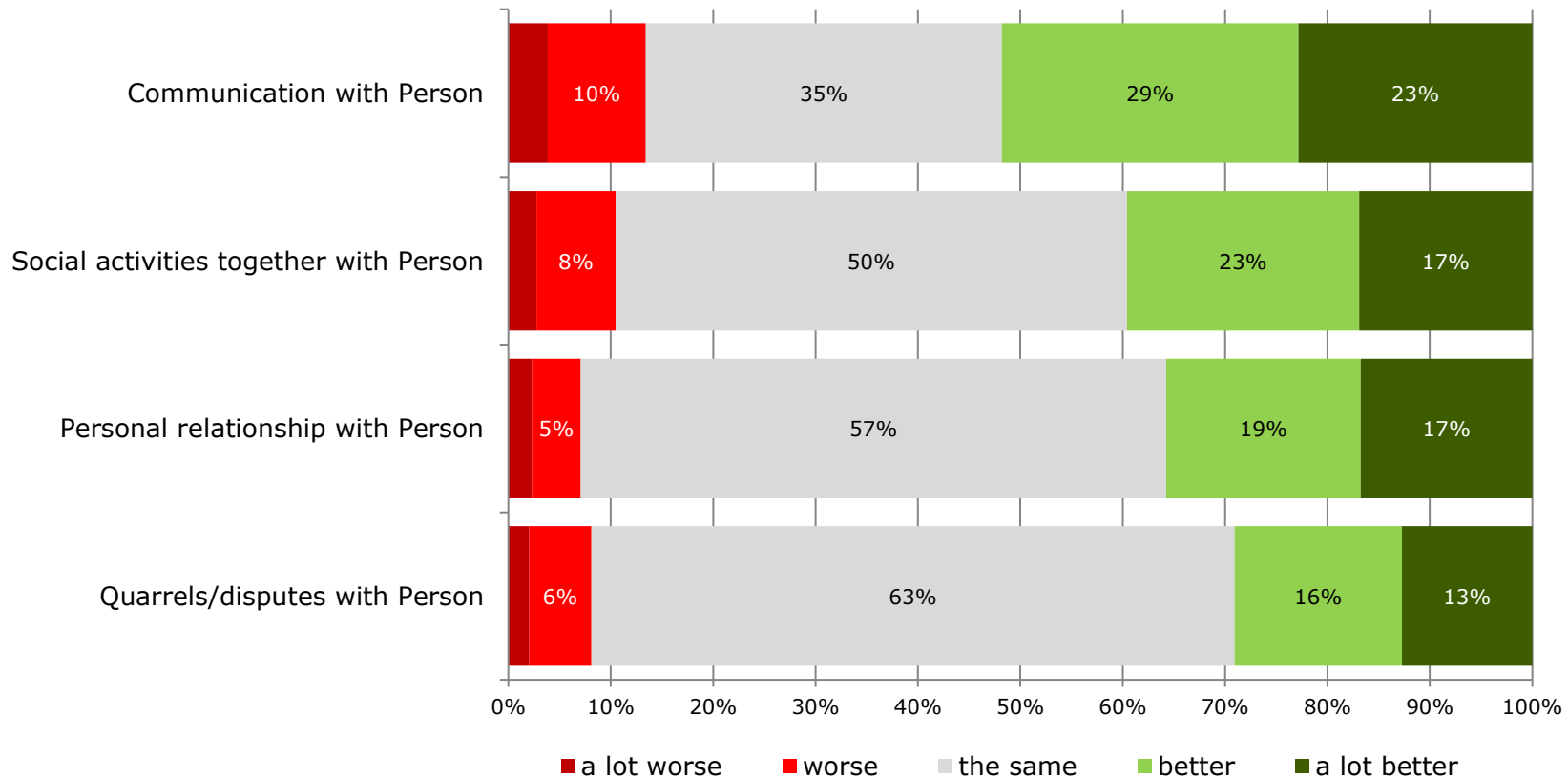
# 2 out of 3 hearing aid owners feel more confident moving in a city since wearing hearing aids!

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



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

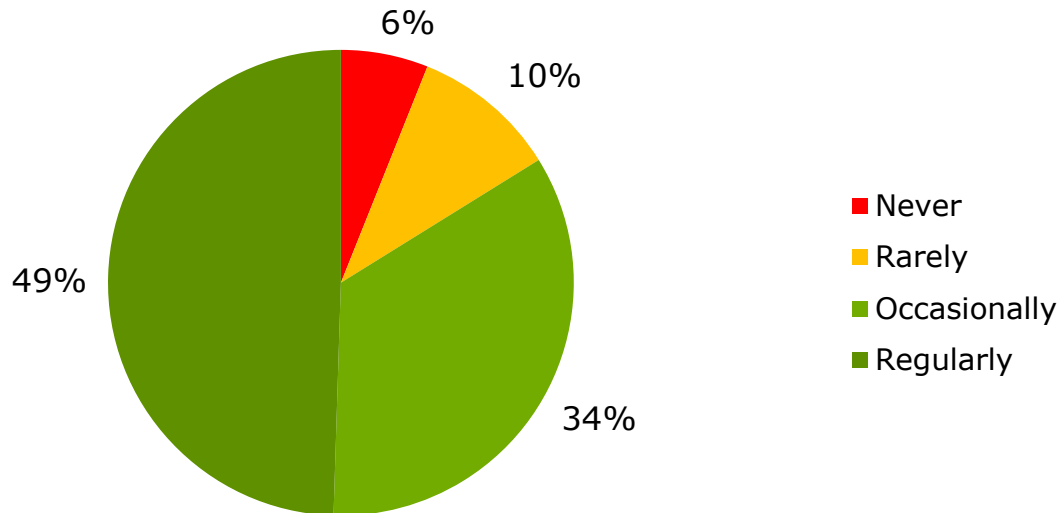
How did the following aspects change since person X is wearing hearing aids?



Someone in HH / parent has HA, n=547

# 94% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

How often do your hearing aids improve your quality of life?





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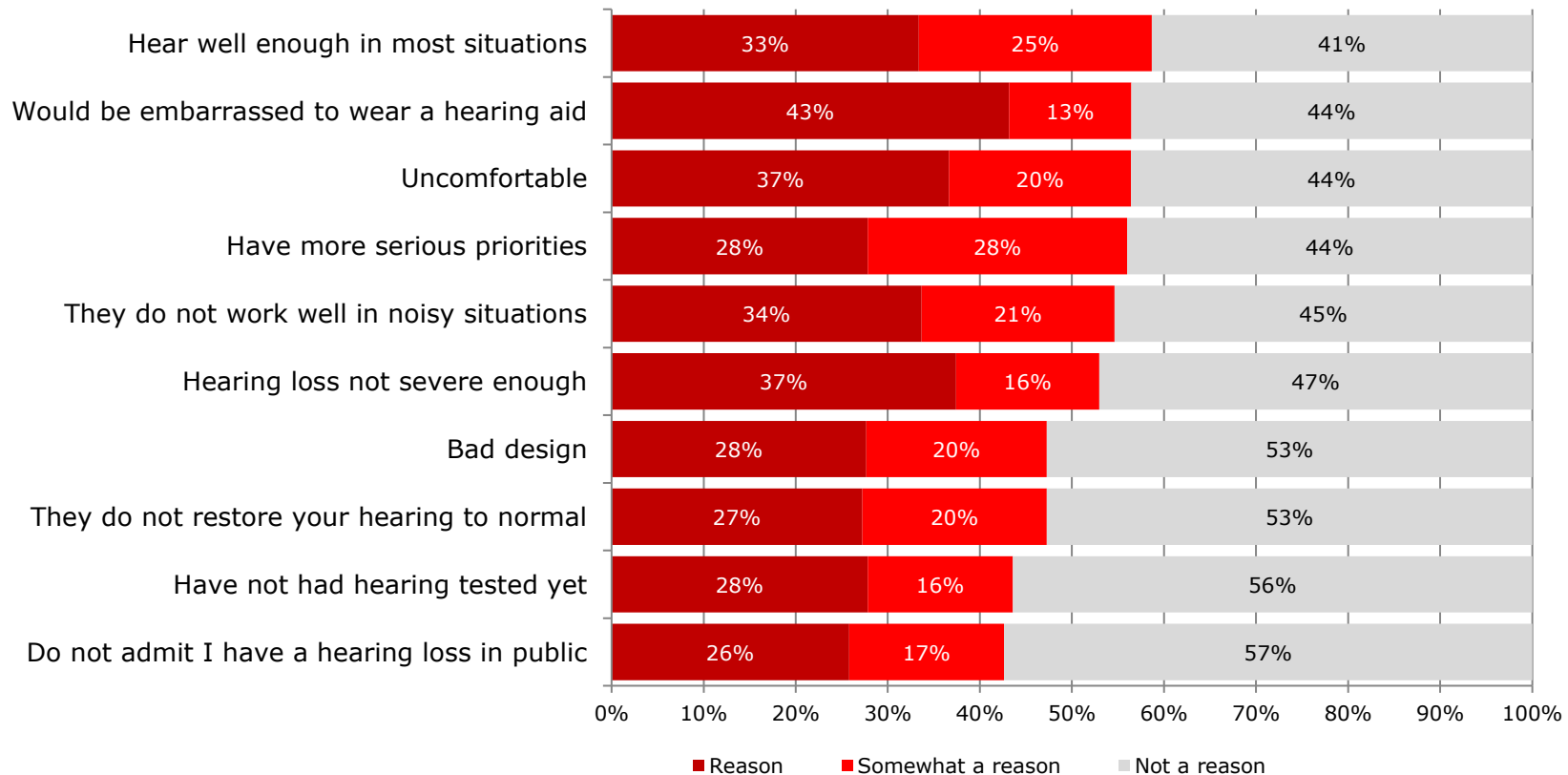
## **4. Analysis of hearing impaired non-owners**

To analyse reasons of non-adoption we look at the Top 50% HL group, as the structure of hearing loss is more similar to that of HA owners

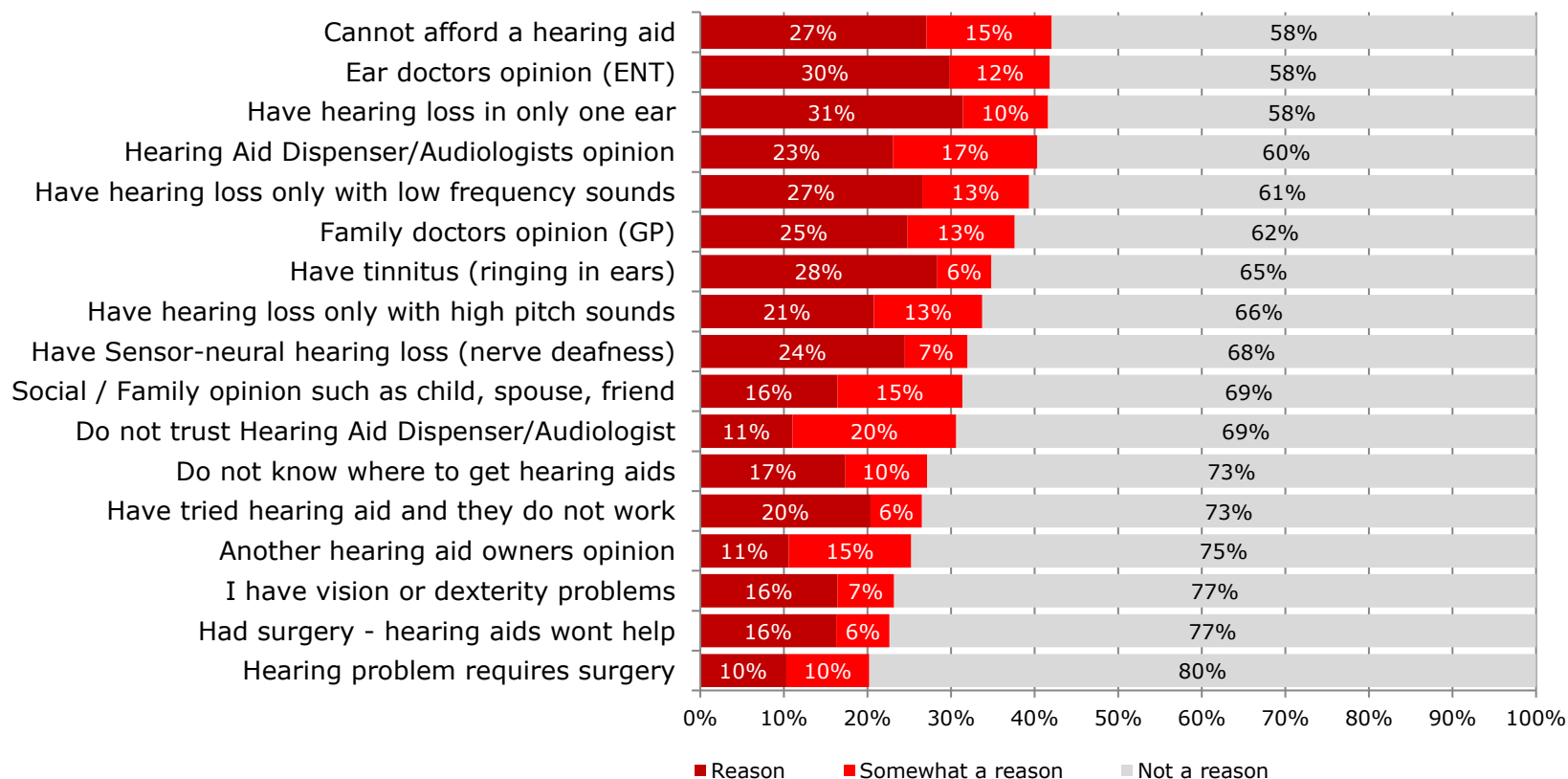
## Hearing loss characteristics: Owners compared to non-owners

	% HA Owner (n=698)	%HA-Non-owner Low 50% HL (n=331)	%HA-Non-owner Top 50% HL (n=164)
<b>Ears impaired</b>			
Unilateral loss	27%	47%	38%
Bilateral loss	73%	53%	62%
<b>Perceived loss</b>		More similar hearing loss- structure	
Mild	18%	50%	18%
Moderate	53%	44%	57%
Severe	25%	4%	20%
Profound	4%	1%	5%

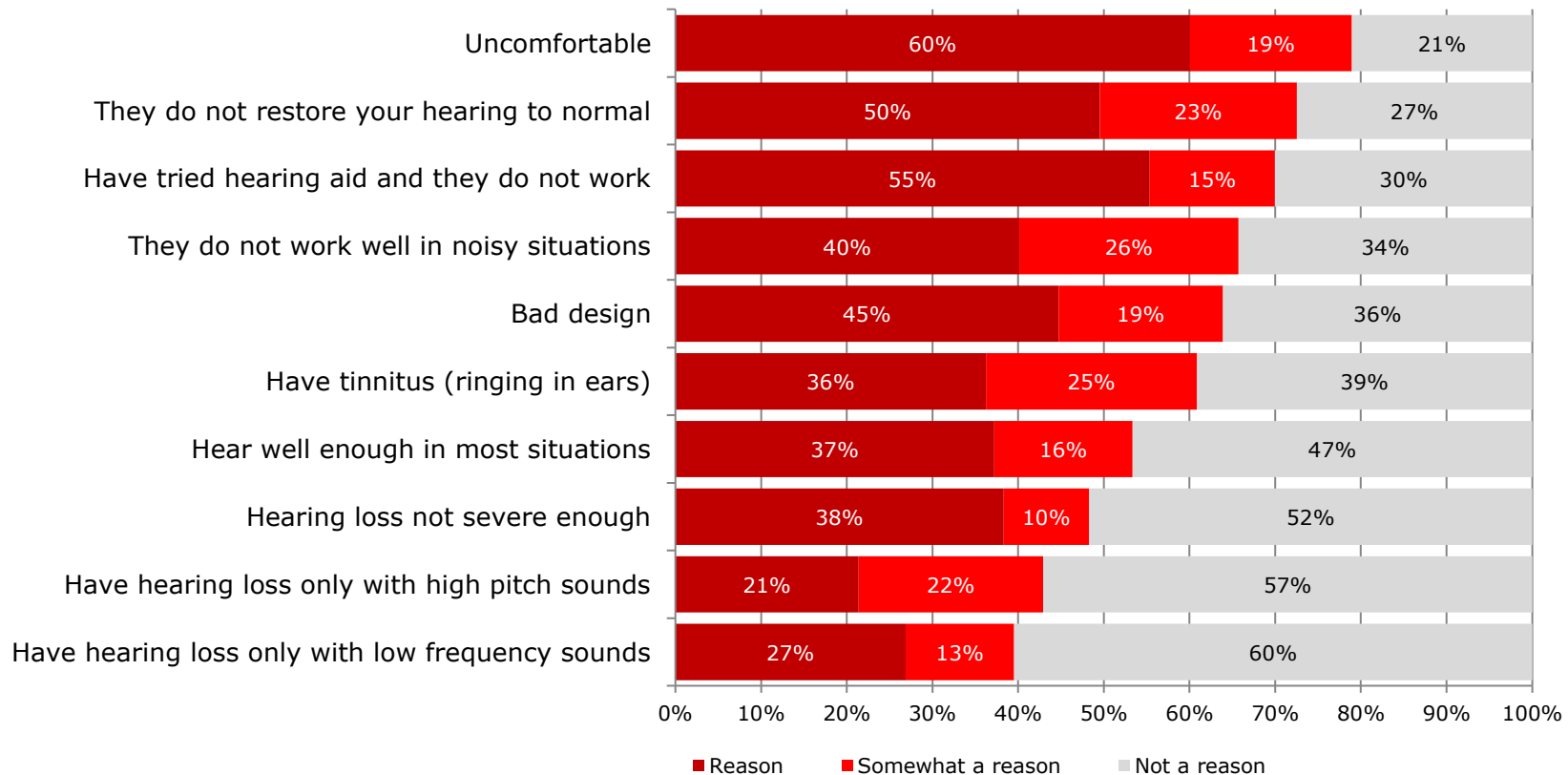
# Top 10 reasons for not having a hearing aid (I/II)



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



# Top 10 reasons for HA owners NOT using them



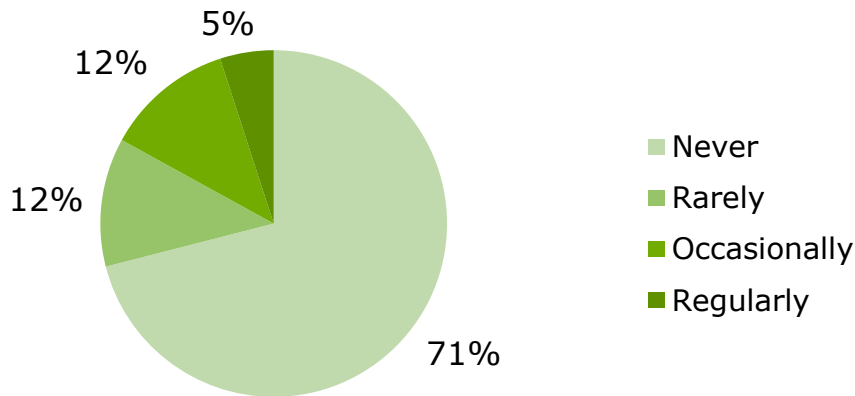
Owners who don't use, n=70

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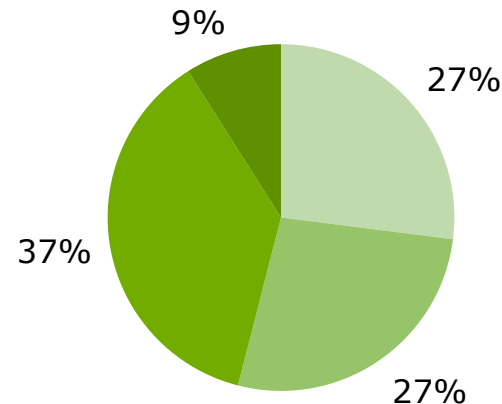
Social rejection because of hearing loss  
compared to the acceptance of hearing aids

71% 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?**



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



Base: N=698

Base: Top 50% hearing loss, no hearing aid N=164

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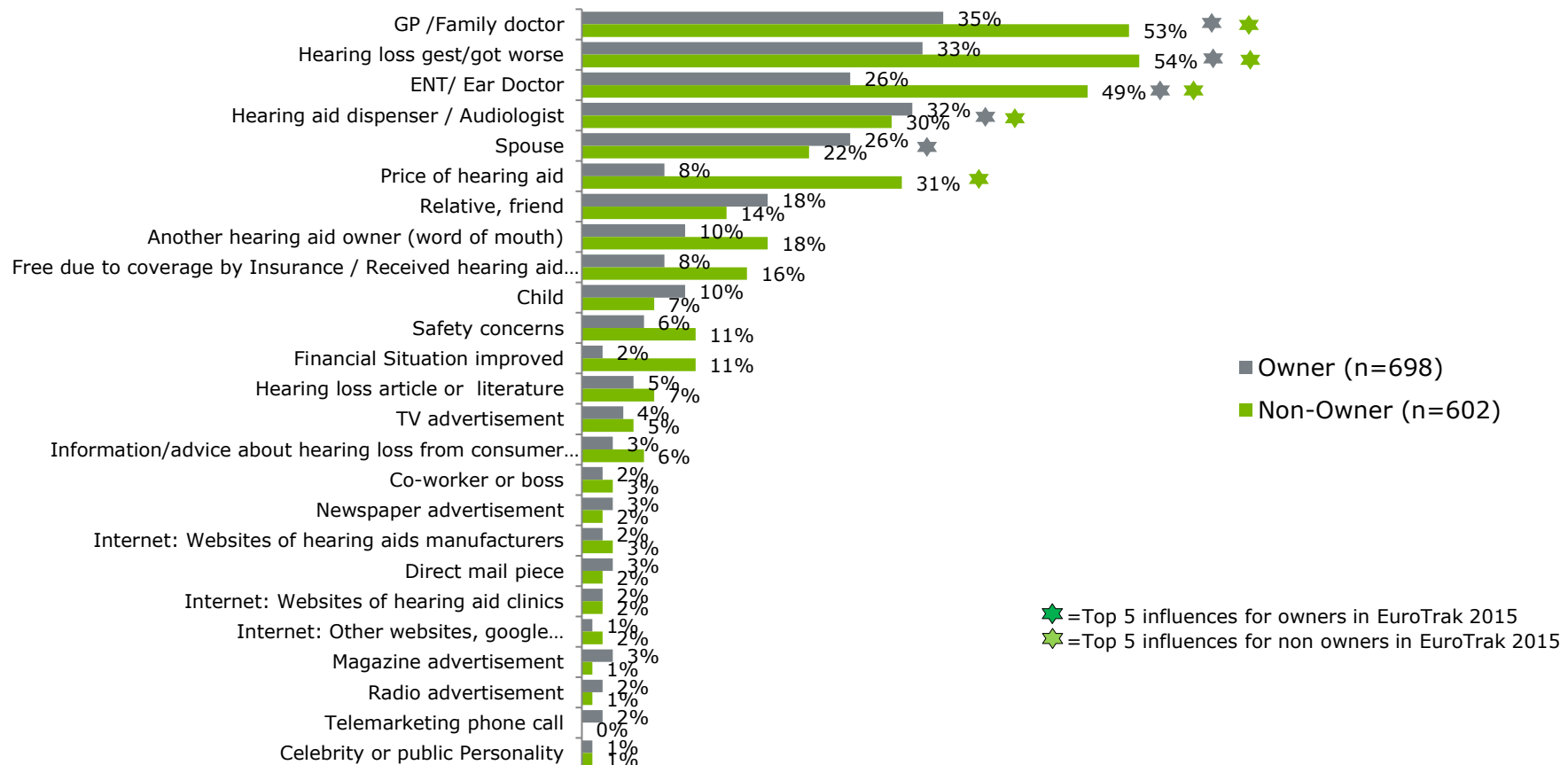
# Most important triggers to buy



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

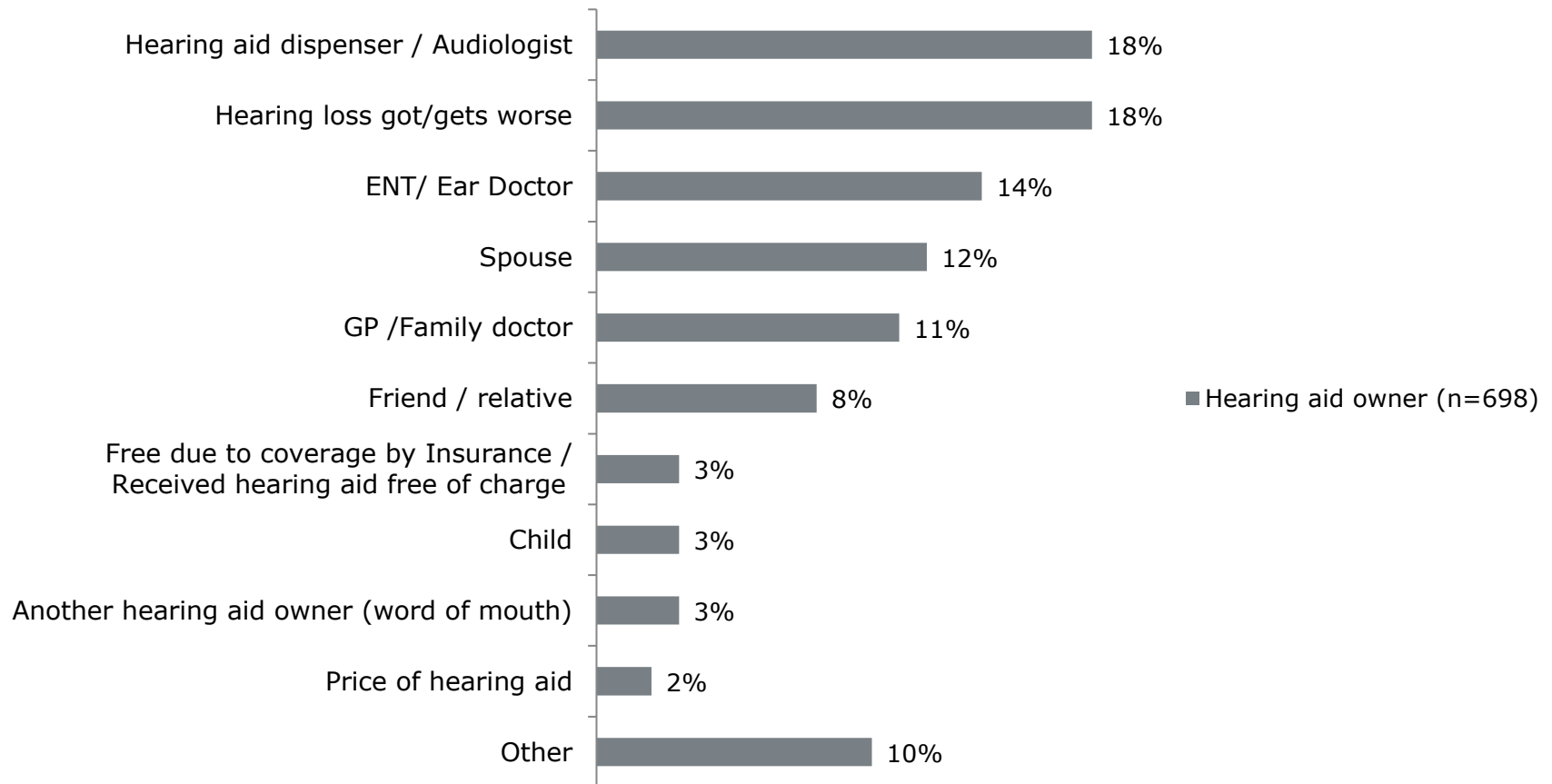
**Non-owner:** Think about the option to obtain / purchase a hearing aid. What do you think would influence you to obtain / purchase a hearing aid ?

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



# The most important trigger to get hearing aids are the audiologist and the worsening hearing loss.

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





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# APPENDIX

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# Sample size and random sample error: Rules of thumb

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

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

# Demographics (1) Hearing instrument adoption rates and populations

					Profiles: Categories add to 100%*		
		Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Gender</b>							
	Male	7'395	10.1%	44.6%	49.5%	55.0%	48.8%
	Female	7'460	9.2%	50.9%	50.5%	45.0%	51.2%
<b>Age recoded</b>							
	1 - 14	2'613	2.4%	44.7%	19.0%	4.5%	4.0%
	15 - 24	1'739	3.6%	42.3%	12.5%	4.7%	3.8%
	25 - 34	2'036	3.6%	34.1%	14.6%	6.4%	3.7%
	35 - 44	1'848	6.2%	37.7%	12.9%	9.5%	6.3%
	45 - 54	2'101	6.8%	34.6%	14.6%	12.5%	7.3%
	55 - 64	1'816	11.5%	41.9%	12.0%	16.1%	12.8%
	65 - 74	1'474	19.2%	45.9%	8.9%	20.4%	19.0%
	74+	1'228	39.9%	60.3%	5.5%	25.8%	43.1%
<b>Type of household</b>							
	single household	1'565	17.8%	52.2%	9.6%	17.7%	21.2%
	Couple, no kids	3'529	14.0%	49.3%	22.6%	33.2%	35.5%
	Couple with kid(s)	7'052	5.6%	42.0%	49.6%	30.3%	24.1%
	Single mom/dad with kid(s)	1'185	7.5%	44.1%	8.2%	6.6%	5.7%
	Retirement home, hospital etc.	155	39.0%	58.1%	0.7%	3.4%	5.1%
	Other	1'370	9.0%	46.2%	9.3%	8.8%	8.3%

# Demographics (2) Hearing instrument adoption rates and populations

				Profiles: Categories add to 100%*		
				No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Status</b>		Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)		
The head of the household (alone or together with someone)		7'555	13.6%	47.8%	48.7%	71.1%
The spouse of the head of the household		2'619	10.0%	52.1%	17.6%	16.7%
Daughter/son of head of household		3'706	2.4%	31.2%	27.0%	8.0%
Other person		974	6.3%	49.6%	6.8%	4.1%
<b>Employment</b>						
Full time employed		5'336	6.5%	37.5%	46.6%	30.1%
Part time employed		1'522	9.2%	41.6%	12.9%	11.4%
Unemployed / not working		1'337	6.3%	29.1%	11.7%	8.3%
Retired under a disability pension scheme (fully or partly)		404	19.6%	59.0%	3.0%	4.5%
Early retired under an early retirement benefit scheme		550	15.6%	51.0%	4.3%	5.9%
Retired (at the official retirement age)		2'172	28.8%	56.2%	14.4%	38.3%
Student / pupil / in training		754	1.7%	21.9%	6.9%	1.4%
<b>Education</b>						
Secondary/Grammar School		2'459	17.9%	51.1%	18.9%	30.0%
"O" Levels		1'574	11.5%	44.8%	13.0%	14.0%
"A" Levels		1'808	6.7%	45.6%	15.8%	9.2%
Ordinary National Certificate		580	14.6%	49.1%	4.6%	6.0%
Higher National Certificate		766	9.6%	42.9%	6.5%	5.8%
Technical High School		642	15.5%	48.7%	5.1%	7.1%
University		3'410	7.5%	45.4%	29.5%	19.5%
Other		835	14.1%	49.7%	6.7%	8.3%