Results

EuroTrak UK 2018

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

Research to create value
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:

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2. Market overview

- **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.
3. Analysis of hearing aid owners

- **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

- 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
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
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age

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<td>8.5%</td>
<td>0.1%</td>
<td>0.0%</td>
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<tr>
<td>15 - 24</td>
<td>5.7%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>5.5%</td>
<td>0.1%</td>
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<tr>
<td>25 - 34</td>
<td>6.7%</td>
<td>0.1%</td>
<td>0.2%</td>
<td>6.5%</td>
<td>0.2%</td>
<td>0.0%</td>
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<td>0.2%</td>
<td>0.1%</td>
<td>5.7%</td>
<td>0.2%</td>
<td>0.1%</td>
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<td>45 - 54</td>
<td>6.6%</td>
<td>0.4%</td>
<td>0.2%</td>
<td>6.6%</td>
<td>0.2%</td>
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<tr>
<td>55 - 64</td>
<td>5.2%</td>
<td>0.5%</td>
<td>0.3%</td>
<td>5.6%</td>
<td>0.3%</td>
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<tr>
<td>65 - 74</td>
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<td>0.6%</td>
<td>0.4%</td>
<td>4.3%</td>
<td>0.4%</td>
<td>0.4%</td>
</tr>
<tr>
<td>74+</td>
<td>2.1%</td>
<td>0.6%</td>
<td>0.8%</td>
<td>2.9%</td>
<td>0.7%</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

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Hearing loss prevalence UK

![Hearing loss prevalence chart](chart.png)

- **Total 18+**
  - EuroTrak 2018: 40.4%
  - EuroTrak 2015: 38.2%
  - EuroTrak 2012: 38.2%
  - EuroTrak 2009: 39.9%

- **74+**
  - EuroTrak 2018: 40.4%
  - EuroTrak 2015: 38.2%
  - EuroTrak 2012: 38.2%
  - EuroTrak 2009: 39.9%

- **65-74**
  - EuroTrak 2018: 19.3%
  - EuroTrak 2015: 19.2%
  - EuroTrak 2012: 19.3%
  - EuroTrak 2009: 20.4%

- **55-64**
  - EuroTrak 2018: 13.0%
  - EuroTrak 2015: 12.9%
  - EuroTrak 2012: 13.0%
  - EuroTrak 2009: 19.9%

- **45-54**
  - EuroTrak 2018: 8.9%
  - EuroTrak 2015: 7.8%
  - EuroTrak 2012: 7.8%
  - EuroTrak 2009: 6.9%

- **35-44**
  - EuroTrak 2018: 4.1%
  - EuroTrak 2015: 3.6%
  - EuroTrak 2012: 3.4%
  - EuroTrak 2009: 6.2%

- **25-34**
  - EuroTrak 2018: 2.4%
  - EuroTrak 2015: 2.1%
  - EuroTrak 2012: 2.8%
  - EuroTrak 2009: 6.8%

- **15-24**
  - EuroTrak 2018: 3.4%
  - EuroTrak 2015: 3.4%
  - EuroTrak 2012: 3.4%
  - EuroTrak 2009: 3.6%

- **<=14**
  - EuroTrak 2018: 1.7%
  - EuroTrak 2015: 2.8%
  - EuroTrak 2012: 3.3%
  - EuroTrak 2009: 3.6%

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Overview hearing loss prevalence and hearing aid adoption

<table>
<thead>
<tr>
<th>Year</th>
<th>Hearing impaired (stated)</th>
<th>Adoption (% of population)</th>
<th>Adoption (% of stated impaired)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EuroTrak 2018</td>
<td>9.7%</td>
<td>47.6%</td>
<td>4.6%</td>
</tr>
<tr>
<td>EuroTrak 2015</td>
<td>9.7%</td>
<td>42.4%</td>
<td>4.1%</td>
</tr>
<tr>
<td>EuroTrak 2012</td>
<td>9.1%</td>
<td>41.1%</td>
<td>3.7%</td>
</tr>
<tr>
<td>EuroTrak 2009</td>
<td>9.5%</td>
<td>38.6%</td>
<td>3.7%</td>
</tr>
</tbody>
</table>
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

* 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

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

n's are unweighted whereas the shown results are weighted
* combined “severe” and “profound” because n is too small
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: 16%
- Yes, in the last 1-5 years: 48%
- Yes, more than 5 years ago: 18%
- No, never: 18%

Where/how was your hearing tested?

- Family doctor: 35%
- Hearing Care Professional: 33%
- Ear doctor (ENT): 28%
- Online test / smartphone app: 2%
- Other: 9%
- Don't know: 4%
Hearing Tests: both hearing screening at the GP and yearly testing for people over 55 is accepted by a majority of the population in the UK.

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

- Yes: 66%
- No: 34%

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

- Yes: 25%
- No: 75%
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.

- Family doctor, ear doctor (ENT), Hearing Aid Dispenser, Audiologist
- Internet research: combined (all three)
- Conversations with friends, relatives already fitted with a hearing aid
- Internet research: websites of hearing aids manufacturers
- Internet research: other websites, google…
- Articles in magazines or newspapers
- Internet research: websites of hearing aid clinics
- Print ads received in your mailbox
- I did not gather information about hearing aids
- Other

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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?

- Total (n=906):
  - 72% Your family doctor
  - 28% Ear doctor (ENT specialist)

- Hearing aid (n=589):
  - 76% Your family doctor
  - 24% Ear doctor (ENT specialist)

- Hearing loss but no hearing aid (n=317):
  - 65% Your family doctor
  - 35% Ear doctor (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*

* 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).

Base: n=1'300
The route to the hearing aid: GP/Family doctor
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

- Total hearing impaired: 60% discussed, 54% referred to hearing aid dispenser/audiologist, 48% referred to ear doctor (ENT), 17% recommended to get a hearing aid, 1% recommended no further action.
- HA owner: 79% discussed, 78% referred to hearing aid dispenser/audiologist, 48% referred to ear doctor (ENT), 17% recommended to get a hearing aid, 1% recommended no further action.
- Hearing impaired non-owners: 49% discussed, 43% referred to hearing aid dispenser/audiologist, 53% referred to ear doctor (ENT), 13% recommended to get a hearing aid, 22% recommended no further action.

What did he/she recommend?

- HA owner (Base: 471):
  - Referred to a hearing aid dispenser/audiologist: 56%
  - Referred to an ear doctor (ENT): 48%
  - Recommended to get a hearing aid: 17%
  - Recommended no further action: 1%

- Impaired non-owner (Base: 270):
  - Referred to a hearing aid dispenser/audiologist: 17%
  - Referred to an ear doctor (ENT): 53%
  - Recommended to get a hearing aid: 13%
  - Recommended no further action: 22%
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?

- Family doctor thought I should wait until it got worse: 54%
- Family doctor did not think I would benefit from hearing aids: 20%
- I did not want to pursue after talking to my family doctor: 11%
- Other: 20%

Base: n=58
The route to the hearing aid: ENT
Have you discussed your hearing problem with an ear doctor (ENT)?

% Discussed with ENT

<table>
<thead>
<tr>
<th></th>
<th>EuroTrak 2018</th>
<th>EuroTrak 2015</th>
<th>EuroTrak 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
<td>54%</td>
<td>42%</td>
<td>52%</td>
</tr>
<tr>
<td>HA owner</td>
<td>67%</td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Hearing impaired non-owners</td>
<td>41%</td>
<td>29%</td>
<td>38%</td>
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</table>

What did he/she recommend?

**HA owner (Base: 400)**
- Did prescribe a hearing aid: 66%
- Referred to a hearing aid dispenser / audiologist: 44%
- Recommended no further action: 2%

**Impaired non-owner (Base: 260)**
- Did prescribe a hearing aid: 18%
- Referred to a hearing aid dispenser / audiologist: 33%
- Recommended no further action: 51%

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The route to the hearing aid: HA dispenser
Have you discussed your hearing problem with a Hearing Aid Dispenser/Audiologist?

% Discussed with Audiologist

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<tbody>
<tr>
<td>Total hearing impaired</td>
<td>55%</td>
<td>47%</td>
<td>46%</td>
</tr>
<tr>
<td>HA owner</td>
<td>85%</td>
<td>84%</td>
<td>86%</td>
</tr>
<tr>
<td>Hearing impaired non-owners</td>
<td>27%</td>
<td>20%</td>
<td>19%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

<table>
<thead>
<tr>
<th></th>
<th>Recommended to get a hearing aid</th>
<th>Recommended not to get a hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>HA owner (Base: 551)</td>
<td>97%</td>
<td>3%</td>
</tr>
<tr>
<td>Impaired non-owner (Base: 160)</td>
<td>53%</td>
<td>47%</td>
</tr>
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</table>

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Recommendations by profession

- **GP (N=740)**
  - Referred to an ear doctor (ENT): 50%
  - Recommended to get a hearing aid: 41%
  - Recommended no further action: 15%

- **ENT (N=660)**
  - Referred to a hearing aid dispenser / audiologist: 40%
  - Recommended to get a hearing aid: 47%
  - Recommended no further action: 9%

- **Audiologist (N=711)**
  - Referred to an ear doctor (ENT): 86%
  - Recommended to get a hearing aid: 14%
  - Recommended no further action: 0%
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?

- 50% Of no use
- 37% Of some use
- 13% Of significant use

Base: N=260
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 = 442/ hearing aid n=479

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**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

<table>
<thead>
<tr>
<th>Hearing aid</th>
<th>Very high</th>
<th>Medium</th>
<th>Very low</th>
</tr>
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<tbody>
<tr>
<td>5%</td>
<td>54%</td>
<td>41%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Top 50% hearing loss, no hearing aid</th>
<th>Very high</th>
<th>Medium</th>
<th>Very low</th>
</tr>
</thead>
<tbody>
<tr>
<td>12%</td>
<td>56%</td>
<td>32%</td>
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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.

- **In the evenings I often feel physically exhausted**
  - **Hearing aid**: 10% Disagree strongly, 21% Rather disagree, 36% Neutral, 19% Rather agree, 13% Strongly agree
  - **Top 50% hearing loss, no hearing aid**: 10% Disagree strongly, 18% Rather disagree, 16% Neutral, 31% Rather agree, 25% Strongly agree

- **In the evenings I often feel mentally exhausted**
  - **Hearing aid**: 18% Disagree strongly, 27% Rather disagree, 26% Neutral, 16% Rather agree, 12% Strongly agree
  - **Top 50% hearing loss, no hearing aid**: 12% Disagree strongly, 22% Rather disagree, 15% Neutral, 27% Rather agree, 24% Strongly agree

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

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

Are you generally satisfied with the quality of your sleep?

- Top 50% hearing loss, no hearing aid (n=105)
  - No: 59%
  - Yes: 41%

- Hearing aid (n=431)
  - No: 44%
  - Yes: 56%
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.

- Depression 34%
- Sleeping disorder 19%
- High blood pressure 11%
- Dementia 11%
- Diabetes 8%
- Poor eyesight 7%
- Back problems 4%

Hearing loss is not linked to any of those health issues 49%

Hearing impaired, N=1’260
3. Analysis of hearing aid owners
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

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2018</td>
</tr>
<tr>
<td>Profound</td>
<td>(4%)</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>71%*</td>
</tr>
<tr>
<td>Severe</td>
<td>(17%)</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moderate</td>
<td>(50%)</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>52%</td>
</tr>
<tr>
<td>Mild</td>
<td>(30%)</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>30%</td>
</tr>
</tbody>
</table>

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

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?

- Yes: 62%
- No: 38%

HA-owner, n=698

How many years did you own your previous HAs?

- 1-3 years: 39%
- 4-6 years: 37%
- 7-10 years: 13%
- 11 years or longer: 10%

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: 16%
- 2 years: 30%
- 3 years: 20%
- 4-6 years: 16%
- more than 6 years: 18%

Base: n=393
31% of all HA owners had their current HA repaired.

Have you ever had your hearing aid repaired?

- Yes: 31%
- No: 66%
- don't know: 2%

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?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>71%</td>
<td>29%</td>
</tr>
</tbody>
</table>

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

- Better social life: 63%
- Better mental/emotional health: 39%
- Better performance at work: 23%
- Less fatigue in the evening: 19%
- Other opportunity: 11%

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?

![Pie chart showing 75% NHS, 21% private sector, and 4% don't know.]

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

![Pie chart showing 44% yes, 28% no, and 28% don't know.]
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?

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>NHS hospital/clinic</td>
<td>60%</td>
</tr>
<tr>
<td>Specialized hearing aid store</td>
<td>16%</td>
</tr>
<tr>
<td>Optician</td>
<td>13%</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>5%</td>
</tr>
<tr>
<td>Online</td>
<td>3%</td>
</tr>
<tr>
<td>Department store</td>
<td>1%</td>
</tr>
<tr>
<td>Club store</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>NHS hospital/clinic</td>
<td>57%</td>
</tr>
<tr>
<td>Specialized hearing aid store</td>
<td>24%</td>
</tr>
<tr>
<td>Optician</td>
<td>11%</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>2%</td>
</tr>
<tr>
<td>Online</td>
<td>2%</td>
</tr>
<tr>
<td>Department store</td>
<td>1%</td>
</tr>
<tr>
<td>Club store</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

HA-owner, n=698

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?

**NPS = PROMOTERS − DETRACTORS = 29**

HA-owner, n=698
On average, HAs are worn 7.8 hours a day

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

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Only 22% 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: 22%
- No, but I could find out: 34%
- No, and can’t find out: 44%

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)

- 22% Yes
- 66% No
- 12% don’t know / no answer

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

- 15% Yes
- 85% No

IF ACCESSORIES USED (n=109):
Overall, how satisfied with the performance of your accessory(s)?

- 2% very dissatisfied
- 14% dissatisfied
- 13% somewhat dissatisfied
- 40% neutral
- 24% somewhat satisfied
- 13% satisfied
- 5% very satisfied
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?

- 35% hearing aids work better than I expected
- 50% hearing aids work as I expected
- 15% hearing aids work worse than I expected

Base: N=698
Overall satisfaction with HA is 74% in the UK

- Total HA-user (n=698)
  - Very dissatisfied: 4%
  - Dissatisfied: 4%
  - Somewhat dissatisfied: 7%
  - Neutral: 11%
  - Somewhat satisfied: 18%
  - Satisfied: 33%
  - Very satisfied: 23%

- Up to two years old (n=353)
  - Very dissatisfied: 4%
  - Dissatisfied: 4%
  - Somewhat dissatisfied: 7%
  - Neutral: 11%
  - Somewhat satisfied: 19%
  - Satisfied: 30%
  - Very satisfied: 28%

- Older than 2 years (n=286)
  - Very dissatisfied: 6%
  - Dissatisfied: 6%
  - Somewhat dissatisfied: 8%
  - Neutral: 11%
  - Somewhat satisfied: 18%
  - Satisfied: 35%
  - Very satisfied: 16%

- HA worn up to 4 hours/day (n=208)
  - Very dissatisfied: 7%
  - Dissatisfied: 8%
  - Somewhat dissatisfied: 17%
  - Neutral: 22%
  - Somewhat satisfied: 17%
  - Satisfied: 16%
  - Very satisfied: 13%

- HA worn 4-8 hours/day (n=189)
  - Very dissatisfied: 4%
  - Dissatisfied: 5%
  - Somewhat dissatisfied: 10%
  - Neutral: 21%
  - Somewhat satisfied: 36%
  - Satisfied: 21%
  - Very satisfied: 89%

- HA worn more than 8 hours/day (n=300)
  - Very dissatisfied: 10%
  - Dissatisfied: 5%
  - Somewhat dissatisfied: 18%
  - Neutral: 42%
  - Somewhat satisfied: 30%
  - Satisfied: 30%
  - Very satisfied: 22%
## Overall Satisfaction with HA: Country comparison

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>Belgium</th>
<th>Netherlands</th>
<th>Poland</th>
<th>France</th>
<th>Switzerland</th>
<th>Denmark</th>
<th>Norway</th>
<th>Italy</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall satisfaction 2012</td>
<td>72%</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>80%</td>
<td>84%</td>
<td>70%</td>
<td>72%</td>
<td>70%</td>
<td>36%</td>
</tr>
<tr>
<td>Overall satisfaction 2015/16/17</td>
<td>70%</td>
<td>80%</td>
<td>73%</td>
<td>80%</td>
<td>84%</td>
<td>81%</td>
<td>71%</td>
<td>-</td>
<td>79%</td>
<td>39%</td>
</tr>
<tr>
<td>Overall satisfaction 2018</td>
<td>74%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Satisfaction with current hearing aids

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

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

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

<table>
<thead>
<tr>
<th>Topic</th>
<th>5%</th>
<th>4%</th>
<th>6%</th>
<th>12%</th>
<th>10%</th>
<th>11%</th>
<th>14%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professionalism of dispenser</td>
<td></td>
<td></td>
<td></td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Quality of service</td>
<td></td>
<td></td>
<td></td>
<td>12%</td>
<td>10%</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Quality of dispensers</td>
<td></td>
<td></td>
<td></td>
<td>12%</td>
<td>10%</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Quality of service after purchase</td>
<td></td>
<td></td>
<td></td>
<td>12%</td>
<td>10%</td>
<td>11%</td>
<td>14%</td>
</tr>
</tbody>
</table>

**Trend**

- Professionalism of dispenser: +2%
- Quality of service during fitting period: +3%
- Quality of dispensers counseling: +3%
- Quality of service after purchase: +5%
- Clarity of tone and sound: +5%
- Natural sounding: +7%
- Richness or fidelity of sound: +5%
- Comfort with loud sounds: +7%
- Ease of changing battery: -2%
- Reliability: +5%
- Visibility to others: +1%
- Value (performance versus money spent): +4%
- Overall fit/Comfort: +4%
- Managing whistling/feedback/buzzing: +4%
- Battery life: +5%

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

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**Satisfaction with current hearing aids**

<table>
<thead>
<tr>
<th>Listening situation</th>
<th>% Dissatisfied</th>
<th>% Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation with one Person</td>
<td>7%</td>
<td>84%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>9%</td>
<td>79%</td>
</tr>
<tr>
<td>At home with family members</td>
<td>7%</td>
<td>79%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>8%</td>
<td>77%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>12%</td>
<td>76%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>8%</td>
<td>75%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>10%</td>
<td>75%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>11%</td>
<td>74%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>8%</td>
<td>73%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>8%</td>
<td>73%</td>
</tr>
<tr>
<td>In a larger lecture hall (e.g., theater, concert hall,...</td>
<td>13%</td>
<td>70%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>10%</td>
<td>69%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>19%</td>
<td>69%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>17%</td>
<td>69%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>20%</td>
<td>68%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>10%</td>
<td>65%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>12%</td>
<td>65%</td>
</tr>
</tbody>
</table>

* % of satisfied HA owners compared to EuroTrak 2015

---

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

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

| Dispenser | Quality of service after purchase | 0.53 |
| Quality of dispensers counseling | 0.51 |
| Professionalism of dispenser | 0.49 |
| Quality of service during hearing aid fitting period | 0.43 |
| Sound quality signal process. | Clearness of tone and sound | 0.68 |
| Natural sounding | 0.67 |
| Richness or fidelity of sound | 0.67 |
| Comfort with loud sounds | 0.60 |
| Product features | Reliability | 0.64 |
| Managing whistling/feedback/buzzing | 0.62 |
| Overall fit/Comfort | 0.51 |
| Value (performance versus money spent) | 0.50 |
| Visibility to others | 0.49 |
| Ease of changing battery | 0.47 |
| Battery life | 0.45 |

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

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

- At home with family members: 54%
- When talking on a phone: 50%
- When watching TV with others: 48%
- In conversations with small groups: 40%
- In conversations with 1 person: 38%
- In noisy situations: 37%
- In conversations with large groups: 33%
- In the workplace: 18%
- When talking to children: 17%
- In a store, when shopping: 17%
- In a larger lecture hall (e.g., theater, concert hall, place of worship, etc.): 15%
- When riding in a car: 15%
- When listening to music: 14%
- Outdoors: 10%
- At a movie theater: 10%
- During leisure activities (e.g., exercising, taking a walk, etc.): 7%
- In school or a classroom (as an observer or student): 6%

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).

<table>
<thead>
<tr>
<th>Area</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>Ability to communicate more effectively in most...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to participate in group activities</td>
<td>5%</td>
<td>32%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>41%</td>
<td></td>
<td></td>
<td></td>
<td>21%</td>
</tr>
<tr>
<td>Social life</td>
<td>9%</td>
<td>33%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>37%</td>
<td></td>
<td></td>
<td></td>
<td>20%</td>
</tr>
<tr>
<td>Confidence in yourself</td>
<td>5%</td>
<td>44%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>33%</td>
<td></td>
<td></td>
<td></td>
<td>17%</td>
</tr>
<tr>
<td>Relationships at home</td>
<td>7%</td>
<td>46%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td>17%</td>
</tr>
<tr>
<td>Relationships at work</td>
<td>5%</td>
<td>50%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
<td>18%</td>
</tr>
<tr>
<td>Sense of safety</td>
<td>3%</td>
<td>51%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>23%</td>
<td></td>
<td></td>
<td></td>
<td>21%</td>
</tr>
<tr>
<td>Feelings about yourself</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>Sense of independence</td>
<td>4%</td>
<td>52%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>29%</td>
<td></td>
<td></td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>Mental/Emotional health</td>
<td>6%</td>
<td>51%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
<td>16%</td>
</tr>
<tr>
<td>Mental ability</td>
<td>4%</td>
<td>54%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>26%</td>
<td></td>
<td></td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>Mental/Emotional health</td>
<td>4%</td>
<td>57%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>22%</td>
<td></td>
<td></td>
<td></td>
<td>15%</td>
</tr>
<tr>
<td>Physical health</td>
<td>3%</td>
<td>61%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
<td>14%</td>
</tr>
<tr>
<td>Physical health</td>
<td>4%</td>
<td>66%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>16%</td>
<td></td>
<td></td>
<td></td>
<td>12%</td>
</tr>
</tbody>
</table>

HA-owner, n=698

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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=234)**
- **Top 50% hearing loss (n=395)**

- **Overall ability to communicate more:**
  - Low: 71%
  - Top: 62%

- **Ability to participate in group activities:**
  - Low: 55%
  - Top: 53%

- **Social life:**
  - Low: 41%
  - Top: 37%

- **Confidence in yourself:**
  - Low: 57%
  - Top: 52%

- **Relationships at home:**
  - Low: 50%
  - Top: 47%

- **Relationships at work:**
  - Low: 47%
  - Top: 46%

- **Sense of safety:**
  - Low: 47%
  - Top: 45%

- **Feelings about yourself:**
  - Low: 43%
  - Top: 40%

- **Sense of independence:**
  - Low: 40%
  - Top: 38%

- **Mental/ emotional health:**
  - Low: 32%
  - Top: 30%

- **Mental ability:**
  - Low: 44%
  - Top: 41%

- **Physical health:**
  - Low: 41%
  - Top: 30%

- **71%**

- **62%**

- **57%**

- **55%**

- **53%**

- **41%**

- **50%**

- **47%**

- **47%**

- **43%**

- **52%**

- **40%**

- **53%**

- **52%**

- **40%**

- **47%**

- **46%**

- **45%**

- **37%**

- **40%**

- **43%**

- **50%**

- **47%**

- **45%**

- **37%**

- **46%**

- **45%**

- **35%**

- **44%**

- **41%**

- **30%**

- **27%**
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?

- Yes: 65%
- No: 35%

Base: N=698
Even for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids.

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

- **Communication with Person**
  - a lot worse: 10%
  - worse: 35%
  - the same: 29%
  - better: 23%

- **Social activities together with Person**
  - a lot worse: 8%
  - worse: 50%
  - the same: 23%
  - better: 17%

- **Personal relationship with Person**
  - a lot worse: 5%
  - worse: 57%
  - the same: 19%
  - better: 17%

- **Quarrels/disputes with Person**
  - a lot worse: 6%
  - worse: 63%
  - the same: 16%
  - better: 13%

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?

- Never: 6%
- Rarely: 10%
- Occasionally: 34%
- Regularly: 49%

Base: N=698
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

<table>
<thead>
<tr>
<th></th>
<th>% HA Owner (n=698)</th>
<th>% HA-Non-owner Low 50% HL (n=331)</th>
<th>% HA-Non-owner Top 50% HL (n=164)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>27%</td>
<td>47%</td>
<td>38%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>73%</td>
<td>53%</td>
<td>62%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>More similar hearing loss-structure</td>
<td></td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>18%</td>
<td>50%</td>
<td>18%</td>
</tr>
<tr>
<td>Moderate</td>
<td>53%</td>
<td>44%</td>
<td>57%</td>
</tr>
<tr>
<td>Severe</td>
<td>25%</td>
<td>4%</td>
<td>20%</td>
</tr>
<tr>
<td>Profound</td>
<td>4%</td>
<td>1%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Top 10 reasons for not having a hearing aid (I/II)

1. Hear well enough in most situations: 33% Reason, 25% Somewhat a reason, 41% Not a reason
2. Would be embarrassed to wear a hearing aid: 43% Reason, 13% Somewhat a reason, 44% Not a reason
3. Uncomfortable: 37% Reason, 20% Somewhat a reason, 44% Not a reason
4. Have more serious priorities: 28% Reason, 28% Somewhat a reason, 44% Not a reason
5. They do not work well in noisy situations: 34% Reason, 21% Somewhat a reason, 45% Not a reason
6. Hearing loss not severe enough: 37% Reason, 16% Somewhat a reason, 47% Not a reason
7. Bad design: 28% Reason, 20% Somewhat a reason, 53% Not a reason
8. They do not restore your hearing to normal: 27% Reason, 20% Somewhat a reason, 53% Not a reason
9. Have not had hearing tested yet: 28% Reason, 16% Somewhat a reason, 56% Not a reason
10. Do not admit I have a hearing loss in public: 26% Reason, 17% Somewhat a reason, 57% Not a reason

Base: non owners Top 50% HL: n=164
Less important reasons for not having a hearing aid (II/II)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Reason</th>
<th>Somewhat a reason</th>
<th>Not a reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cannot afford a hearing aid</td>
<td>27%</td>
<td>15%</td>
<td>58%</td>
</tr>
<tr>
<td>Ear doctors opinion (ENT)</td>
<td>30%</td>
<td>12%</td>
<td>58%</td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>31%</td>
<td>10%</td>
<td>58%</td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>23%</td>
<td>17%</td>
<td>60%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>27%</td>
<td>13%</td>
<td>61%</td>
</tr>
<tr>
<td>Family doctors opinion (GP)</td>
<td>25%</td>
<td>13%</td>
<td>62%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>28%</td>
<td>6%</td>
<td>65%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>21%</td>
<td>13%</td>
<td>66%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>24%</td>
<td>7%</td>
<td>68%</td>
</tr>
<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>16%</td>
<td>15%</td>
<td>69%</td>
</tr>
<tr>
<td>Do not trust Hearing Aid Dispenser/Audiologist</td>
<td>11%</td>
<td>20%</td>
<td>69%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>17%</td>
<td>10%</td>
<td>73%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>20%</td>
<td>6%</td>
<td>73%</td>
</tr>
<tr>
<td>Another hearing aid owners opinion</td>
<td>11%</td>
<td>15%</td>
<td>75%</td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td>16%</td>
<td>7%</td>
<td>77%</td>
</tr>
<tr>
<td>Had surgery - hearing aids wont help</td>
<td>16%</td>
<td>6%</td>
<td>77%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>10%</td>
<td>10%</td>
<td>80%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=164
## Top 10 reasons for HA owners NOT using them

1. **Uncomfortable**
   - Reason: 60%
   - Somewhat a reason: 19%
   - Not a reason: 21%

2. **They do not restore your hearing to normal**
   - Reason: 50%
   - Somewhat a reason: 23%
   - Not a reason: 27%

3. **Have tried hearing aid and they do not work**
   - Reason: 55%
   - Somewhat a reason: 15%
   - Not a reason: 30%

4. **They do not work well in noisy situations**
   - Reason: 40%
   - Somewhat a reason: 26%
   - Not a reason: 34%

5. **Bad design**
   - Reason: 45%
   - Somewhat a reason: 19%
   - Not a reason: 36%

6. **Have tinnitus (ringing in ears)**
   - Reason: 36%
   - Somewhat a reason: 25%
   - Not a reason: 39%

7. **Hear well enough in most situations**
   - Reason: 37%
   - Somewhat a reason: 16%
   - Not a reason: 47%

8. **Hearing loss not severe enough**
   - Reason: 38%
   - Somewhat a reason: 10%
   - Not a reason: 52%

9. **Have hearing loss only with high pitch sounds**
   - Reason: 21%
   - Somewhat a reason: 22%
   - Not a reason: 57%

10. **Have hearing loss only with low frequency sounds**
    - Reason: 27%
    - Somewhat a reason: 13%
    - Not a reason: 60%

---

Owners who don't use, n=70
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?

- Never: 71%
- Rarely: 12%
- Occasionally: 12%
- Regularly: 5%

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

- Never: 27%
- Rarely: 27%
- Occasionally: 37%
- Regularly: 9%

Base: N=698

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

- GP /Family doctor
- Hearing loss gest/got worse
- ENT/ Ear Doctor
- Hearing aid dispenser / Audiologist
- Spouse
- Price of hearing aid
- Relative, friend
- Another hearing aid owner (word of mouth)
- Free due to coverage by Insurance / Received hearing aid...
- Child
- Safety concerns
- Financial Situation improved
- Hearing loss article or literature
- TV advertisement
- Information/advice about hearing loss from consumer...
- Co-worker or boss
- Newspaper advertisement
- Internet: Websites of hearing aids manufacturers
- Direct mail piece
- Internet: Websites of hearing aid clinics
- Internet: Other websites, google...
- Magazine advertisement
- Radio advertisement
- Telemarketing phone call
- Celebrity or public Personality

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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)?

- Hearing aid dispenser / Audiologist: 18%
- Hearing loss got/gets worse: 18%
- ENT/Ear Doctor: 14%
- Spouse: 12%
- GP /Family doctor: 11%
- Friend / relative: 8%
- Free due to coverage by Insurance / Received hearing aid free of charge: 3%
- Child: 3%
- Another hearing aid owner (word of mouth): 3%
- Price of hearing aid: 2%
- Other: 10%
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E-Mail christian.egger@anovum.com
www.anovum.com
Sample size and random sample error: Rules of thumb

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

<table>
<thead>
<tr>
<th>Sample size</th>
<th>Random sample error</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Real value is within interval:</td>
</tr>
<tr>
<td></td>
<td>Level of proportion: 50%/50%</td>
</tr>
<tr>
<td>50</td>
<td>+- 13.9</td>
</tr>
<tr>
<td>100</td>
<td>+- 9.8</td>
</tr>
<tr>
<td>250</td>
<td>+- 6.2</td>
</tr>
<tr>
<td>500</td>
<td>+- 4.4</td>
</tr>
<tr>
<td>1000</td>
<td>+- 3.1</td>
</tr>
<tr>
<td>5’000</td>
<td>+- 1.4</td>
</tr>
<tr>
<td>10’000</td>
<td>+- 1.0</td>
</tr>
</tbody>
</table>
### Demographics (1) Hearing instrument adoption rates and populations

<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>7'395</td>
<td>10.1%</td>
<td>44.6%</td>
<td>49.5%</td>
<td>55.0%</td>
<td>48.8%</td>
</tr>
<tr>
<td>Female</td>
<td>7'460</td>
<td>9.2%</td>
<td>50.9%</td>
<td>50.5%</td>
<td>45.0%</td>
<td>51.2%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age recoded</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>1 - 14</td>
<td>2'613</td>
<td>2.4%</td>
<td>44.7%</td>
<td>19.0%</td>
<td>4.5%</td>
<td>4.0%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1'739</td>
<td>3.6%</td>
<td>42.3%</td>
<td>12.5%</td>
<td>4.7%</td>
<td>3.8%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>2'036</td>
<td>3.6%</td>
<td>34.1%</td>
<td>14.8%</td>
<td>6.4%</td>
<td>3.7%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1'848</td>
<td>6.2%</td>
<td>37.7%</td>
<td>12.9%</td>
<td>9.5%</td>
<td>6.3%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>2'101</td>
<td>6.8%</td>
<td>34.6%</td>
<td>14.6%</td>
<td>12.5%</td>
<td>7.3%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1'816</td>
<td>11.5%</td>
<td>41.9%</td>
<td>12.0%</td>
<td>16.1%</td>
<td>12.8%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1'474</td>
<td>19.2%</td>
<td>45.9%</td>
<td>8.9%</td>
<td>20.4%</td>
<td>19.0%</td>
</tr>
<tr>
<td>74+</td>
<td>1'228</td>
<td>39.9%</td>
<td>60.3%</td>
<td>5.5%</td>
<td>25.8%</td>
<td>43.1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type of household</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>single household</td>
<td>1'565</td>
<td>17.8%</td>
<td>52.2%</td>
<td>9.6%</td>
<td>17.7%</td>
<td>21.2%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>3'529</td>
<td>14.0%</td>
<td>49.3%</td>
<td>22.6%</td>
<td>33.2%</td>
<td>35.5%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>7'052</td>
<td>5.6%</td>
<td>42.0%</td>
<td>49.6%</td>
<td>30.3%</td>
<td>24.1%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>1'185</td>
<td>7.5%</td>
<td>44.1%</td>
<td>8.2%</td>
<td>6.6%</td>
<td>5.7%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>155</td>
<td>39.0%</td>
<td>58.1%</td>
<td>0.7%</td>
<td>3.4%</td>
<td>5.1%</td>
</tr>
<tr>
<td>Other</td>
<td>1'370</td>
<td>9.0%</td>
<td>46.2%</td>
<td>9.3%</td>
<td>8.8%</td>
<td>8.3%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*

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

#### Status

<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>7555</td>
<td>13.6%</td>
<td>47.8%</td>
<td>48.7%</td>
<td>71.1%</td>
<td>71.5%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>2619</td>
<td>10.0%</td>
<td>52.1%</td>
<td>17.6%</td>
<td>16.7%</td>
<td>20.0%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>3706</td>
<td>2.4%</td>
<td>31.2%</td>
<td>27.0%</td>
<td>8.0%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Other person</td>
<td>974</td>
<td>6.3%</td>
<td>49.6%</td>
<td>6.8%</td>
<td>4.1%</td>
<td>4.5%</td>
</tr>
</tbody>
</table>

#### Employment

<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>5336</td>
<td>6.5%</td>
<td>37.5%</td>
<td>46.6%</td>
<td>30.1%</td>
<td>19.7%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>1522</td>
<td>9.2%</td>
<td>41.6%</td>
<td>12.9%</td>
<td>11.4%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>1337</td>
<td>6.3%</td>
<td>29.1%</td>
<td>11.7%</td>
<td>8.3%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>404</td>
<td>19.6%</td>
<td>59.0%</td>
<td>3.0%</td>
<td>4.5%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>550</td>
<td>15.6%</td>
<td>51.0%</td>
<td>4.3%</td>
<td>5.9%</td>
<td>6.7%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>2172</td>
<td>28.8%</td>
<td>56.2%</td>
<td>14.4%</td>
<td>38.3%</td>
<td>53.5%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>754</td>
<td>1.7%</td>
<td>21.9%</td>
<td>6.9%</td>
<td>1.4%</td>
<td>0.4%</td>
</tr>
</tbody>
</table>

#### Education

<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>Secondary/Grammar School</td>
<td>2459</td>
<td>17.9%</td>
<td>51.1%</td>
<td>18.9%</td>
<td>30.0%</td>
<td>34.2%</td>
</tr>
<tr>
<td>&quot;O&quot; Levels</td>
<td>1374</td>
<td>11.5%</td>
<td>44.8%</td>
<td>13.0%</td>
<td>14.0%</td>
<td>12.4%</td>
</tr>
<tr>
<td>&quot;A&quot; Levels</td>
<td>1808</td>
<td>6.7%</td>
<td>45.6%</td>
<td>15.8%</td>
<td>9.2%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Ordinary National Certificate</td>
<td>580</td>
<td>14.6%</td>
<td>49.1%</td>
<td>4.6%</td>
<td>6.0%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Higher National Certificate</td>
<td>766</td>
<td>9.6%</td>
<td>42.9%</td>
<td>6.5%</td>
<td>5.8%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Technical High School</td>
<td>642</td>
<td>15.5%</td>
<td>48.7%</td>
<td>5.1%</td>
<td>7.1%</td>
<td>7.4%</td>
</tr>
<tr>
<td>University</td>
<td>3410</td>
<td>7.5%</td>
<td>45.4%</td>
<td>29.5%</td>
<td>19.5%</td>
<td>17.7%</td>
</tr>
<tr>
<td>Other</td>
<td>835</td>
<td>14.1%</td>
<td>49.7%</td>
<td>6.7%</td>
<td>8.3%</td>
<td>8.9%</td>
</tr>
</tbody>
</table>

* Profiles: Categories add to 100%*  
* Small sample sizes in some categories