Results

AustraliaTrak 2021

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

AustraliaTrak 2021 was designed and executed by Anovum (Zurich) on behalf of HCIA and EHIMA.

Sample sizes:
Representative sample (sample 1):  n=14'670 people
Hearing impaired (sample 2):
   HA owners:  n= 685 people
   Hearing impaired non-owners:  n= 640 people
Summary

2. Market overview

- Stated hearing loss prevalence
  - Total: 11.8%, 18+: 14.2% (2017: 11.9%, 18+: 14.1%).
  - Hearing Tests: 39% (2017: 31%) had a hearing test in the last 5 years, most tests done by by Hearing Aid clinicians and family doctors.

- Hearing aid adoption rate (HA penetration)
  - 44.7% of those with self declared HL (2017: 41.0%).
  - 5.3% of total population (2017: 4.9%).
  - 64% of HA owners have binaural treatment (2017: 63%).

- The route to the hearing aid
  - 67% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 57% got hearing aids recommended from the ENT or family doctor (drop out rate=14% / 2017: 17%).
  - 40% of the GP consultations referred to an ENT, 63% to a HA Clinician (2017: 54%). 8% recommended no action.
  - 55% of ENT consultations referred to HA Clinician , 19% 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.
3. Analysis of hearing aid owners

• Hearing aid ownership, usage and accessories
  – 65% of the currently owned HAs were bought in 2019 or later.
  – The average age of the currently owned HAs is 2.8 years.
  – The median age of hearing aids before replacement is 5 years.
  – On average, HAs are worn 6.8 hours a day.
  – 56% of today’s hearing aid owners are aware of their hearing aid brand.
  – 44% of the HA owners use an accessory/app for their hearing aids, 76% of those are satisfied with it.

• Importance of listening situations and satisfaction with HAs
  – 87% of the hearing aid owners say their hearing aid works better than or as expected
  – 77% of the HA owners are satisfied with their HAs (2017: 72%).
  – The more hours worn per day, the higher the satisfaction with the HA.
  – Satisfaction with newer hearing aids is higher than with older hearing aids.
  – Talking at home with family members, talking on a phone, watching TV with others and noisy situations are the most important listening situations.

• Positive impact of HAs
  – Significant positive impact of HAs on different aspects: Especially Communication effectiveness, ability to participate in group activities and relationship at work improve with 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**
  - The main reasons for not using hearing aids are that people (think) they can’t afford them, they hear enough in most situations, they have more serious priorities, they think that hearing aids are uncomfortable and do not work well in noisy situations.
  - 8% who own hearing aids don’t use them at all (0 hours); 20% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**
  - 55% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid (only 36% say they are never made fun of because of their hearing loss).
  - The most important influencing factors for getting hearing aids are worsening hearing loss, HA Clinician, doctors and spouse (+price, insurance coverage for the non owners).
Detailed Results: Roadmap

1. Introduction
   - Organisation of AustraliaTrak 2021
   - 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 AustraliaTrak 2021

Organisation

- Principal of the project AustraliaTrak 2021 are HCIA and EHIMA.
- Anovum Zurich developed the concept of AustraliaTrak, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore Anovum analyzed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire.

Use of the data

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

- The raw dataset remains at Anovum. If the principal uses the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
  "Source: Anovum – AustraliaTrak/2021/n=[relevant sample size]"

- Member companies of the principal can ask Anovum to further analyse the raw data in specific ways at their own expense.
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 large panellist pools
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of \( n=14'670 \) 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: \( n=685 \) hearing aid owners and \( n=640 \) hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age

- **Women:**
  - Unimpaired non-owner: 8.7%
  - Impaired non-user: 1.8%
  - HA owner: 0.7%

- **Men:**
  - Unimpaired non-owner: 9.2%
  - Impaired non-user: 0.8%
  - HA owner: 0.6%

The chart shows the percentage distribution of hearing instrument ownership across different age groups and genders.
Hearing loss prevalence Australia
Self declared hearing loss

% hearing loss prevalence

<table>
<thead>
<tr>
<th>Age Group</th>
<th>AustraliaTrak 2021</th>
<th>AustraliaTrak 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 18+</td>
<td>14.2%</td>
<td>14.1%</td>
</tr>
<tr>
<td>Total</td>
<td>11.8%</td>
<td>11.9%</td>
</tr>
<tr>
<td>74+</td>
<td>36.9%</td>
<td>36.9%</td>
</tr>
<tr>
<td>65-74</td>
<td>25.2%</td>
<td>24.9%</td>
</tr>
<tr>
<td>55-64</td>
<td>17.1%</td>
<td>17.2%</td>
</tr>
<tr>
<td>45-54</td>
<td>13.0%</td>
<td>17.2%</td>
</tr>
<tr>
<td>35-44</td>
<td>7.0%</td>
<td>11.9%</td>
</tr>
<tr>
<td>25-34</td>
<td>7.5%</td>
<td>7.3%</td>
</tr>
<tr>
<td>15-24</td>
<td>4.4%</td>
<td>4.5%</td>
</tr>
<tr>
<td>&lt;=14</td>
<td>3.9%</td>
<td>4.1%</td>
</tr>
</tbody>
</table>

AustraliaTrak 2021
Base: 14,670

AustraliaTrak 2017
Base: 15,534
Hearing aid adoption rate: 45% of hearing impaired have hearing aid(s), 64% of them have binaural treatment.
Overview hearing loss prevalence and hearing aid adoption

AustraliaTrak 2021

- Hearing impaired (stated): 11.8%
- Adoption (% of population): 5.3%
- Adoption (% of stated impaired): 44.7%

AustraliaTrak 2017

- Hearing impaired (stated): 11.9%
- Adoption (% of population): 4.9%
- Adoption (% of stated impaired): 41.0%
The more severe the hearing loss, the higher the adoption rate

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

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

<table>
<thead>
<tr>
<th></th>
<th>HA-Non-owner</th>
<th>HA Owner</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n=640</td>
<td>n=685</td>
<td></td>
</tr>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(stated)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>38%</td>
<td>27%</td>
<td>40%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>62%</td>
<td>73%</td>
<td>53%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>41%</td>
<td>18%</td>
<td>27%</td>
</tr>
<tr>
<td>Moderate</td>
<td>46%</td>
<td>51%</td>
<td>47%</td>
</tr>
<tr>
<td>Severe</td>
<td>9%</td>
<td>26%</td>
<td>67%*</td>
</tr>
<tr>
<td>Profound</td>
<td>3%</td>
<td>4%</td>
<td></td>
</tr>
</tbody>
</table>

* combined “severe” and “profound” because n is too small
Hearing tests and where hearing is tested
Hearing Tests: 39% had a hearing test in the last 5 years (2017: 31%), most tests done by Hearing Aid clinicians and family doctors

Have you ever taken a hearing test?
- Yes, in the last 12 months: 17%
- Yes, in the last 1-5 years: 19%
- Yes, more than 5 years ago: 20%
- No, never: 44%

Where/how was your hearing tested?
- Hearing Aid clinician: 36%
- Family doctor: 35%
- Ear doctor (ENT): 29%
- Online test, smartphone app: 5%
- Other: 8%
- DNK: 4%

Base=11'771

Base= 4'569
The route to the hearing aid: Sources of information and drop-out rates
Doctors/HCPs are the most important sources of information and therefore the major gatekeepers.

### Where did you gather information about hearing aids?

<table>
<thead>
<tr>
<th>Source</th>
<th>Hearing loss Total (n=1'325)</th>
<th>Hearing aid (n=685)</th>
<th>Hearing loss but no hearing aid (n=640)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family doctor, ear doctor (ENT), Hearing Aid Clinician</td>
<td>36%</td>
<td>28%</td>
<td>36%</td>
</tr>
<tr>
<td>Internet research: combined (all three)</td>
<td>22%</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>Conversations with friends, relatives already fitted with a hearing aid</td>
<td>17%</td>
<td>22%</td>
<td>17%</td>
</tr>
<tr>
<td>Internet research: websites of hearing aids manufacturers</td>
<td>13%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Internet research: websites of hearing aid clinics</td>
<td>12%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Internet research: other websites, google…</td>
<td>10%</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Print ads received in your mailbox</td>
<td>5%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Articles in magazines or newspapers</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>I did not gather information about hearing aids</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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Of those who discussed the hearing loss with a doctor, 2 out of 3 talked to a family doctor first

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

- 33% Ear, Nose and Throat specialist (ENT)
- 67% Your family doctor

Total n= 841

- Hearing aid (n=529): 28% Ear, Nose and Throat specialist (ENT), 72% Your family doctor
- Hearing loss but no hearing aid (n=312): 38% Ear, Nose and Throat specialist (ENT), 62% Your family doctor
The route to the hearing aid

- Impaired: 100% (Base: n=1'325)
- ENT/Doctor: 67% (2017: 50%)
- Recommend: 57% (2017: 43%)
- Discussed hearing aid with HA clinician: 68% (2017: 65%)
- Positive advice audiologist: 54% (2017: 48%)
- Bought hearing aid: 45% (2017: 34%)

Drop out:
- ENT/Doctor: 33% (2017: 34%)
- Recommend: 14% (2017: 17%)
- Discussed hearing aid with HA clinician: 22% (2017: 25%)
Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*

Low 50% hearing loss*

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

People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).
The route to the hearing aid: GP/Family doctor
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

Total hearing impaired
- HA owner: 76%
- Hearing impaired non-owners: 41%

HA owner
- 57%
- 74%

Impaired non-owner
- 41%
- 42%

What did he/she recommend?

HA owner (Base: n = 439)
- Referred to an ear doctor (ENT): 40%
- Referred to a Hearing Aid Clinician: 70%
- Recommended to get a hearing aid: 24%
- Recommended no further action: 2%

Impaired non-owner (Base: n = 298)
- Referred to an ear doctor (ENT): 39%
- Referred to a Hearing Aid Clinician: 52%
- Recommended to get a hearing aid: 7%
- Recommended no further action: 16%
The route to the hearing aid: ENT
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

<table>
<thead>
<tr>
<th></th>
<th>Total hearing impaired</th>
<th>HA owner</th>
<th>Hearing impaired non-owners</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>47%</td>
<td>42%</td>
<td>36%</td>
</tr>
<tr>
<td></td>
<td>42%</td>
<td>61%</td>
<td>34%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

<table>
<thead>
<tr>
<th></th>
<th>HA owner (Base: n = 351)</th>
<th>Impaired non-owner (Base: n = 258)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referred to a HA clinician</td>
<td>59%</td>
<td>49%</td>
</tr>
<tr>
<td>Did prescribe a hearing aid</td>
<td>58%</td>
<td>16%</td>
</tr>
<tr>
<td>Recommended no further action</td>
<td>3%</td>
<td>40%</td>
</tr>
</tbody>
</table>

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The route to the hearing aid: HA clinician
Have you ever discussed your hearing problem with a HA clinician?

% Discussed with HA clinician

- Total hearing impaired: 68% (discussed) vs. 61% (not discussed)
- HA owner: 95% (discussed) vs. 5% (not discussed)
- Hearing impaired non-owners: 46% (discussed) vs. 44% (not discussed)

What did he/she recommend?

HA owner (Base: n = 644)
- Recommended to get a hearing aid: 97%
- Recommended not to get a hearing aid: 3%

Impaired non-owner (Base: n = 288)
- Recommended to get a hearing aid: 50%
- Recommended not to get a hearing aid: 50%
Recommendations by profession

- **GP**
  - Referred to an ear doctor (ENT): 63%
  - Referred to a HA clinician: 40%
  - Recommended to get a hearing aid: 17%
  - Recommended no further action: 8%

- **ENT**
  - Referred to an ear doctor (ENT): 30%
  - Referred to a HA clinician: 40%
  - Recommended to get a hearing aid: 19%

- **HA clinician**
  - Referred to an ear doctor (ENT): 2017: 54%
  - Referred to a HA clinician: 2017: 30%
  - Recommended to get a hearing aid: 21%
  - Recommended no further action: 79%
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities
Work competitiveness: 86% 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?

- Of no use: 14%
- Of some use: 36%
- Of significant use: 51%

Base: n=219
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.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Hearing Aid</th>
<th>Hearing Loss, No Hearing Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>I think that people with an untreated hearing loss tend to be less promoted in their job</td>
<td>6% 11% 27% 31% 25%</td>
<td>17% 15% 39% 18% 10%</td>
</tr>
<tr>
<td>I think that people with an untreated hearing loss tend not to get the job they deserve</td>
<td>8% 9% 28% 29% 26%</td>
<td>18% 14% 43% 18% 8%</td>
</tr>
<tr>
<td>I think that people with an untreated hearing loss tend to be under salaried</td>
<td>7% 10% 28% 29% 26%</td>
<td>19% 15% 44% 15% 7%</td>
</tr>
</tbody>
</table>

Base: Hearing loss, no hearing aid n=462/ hearing aid n=511
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).

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

Base: hearing aid n=439 / top 50% HL, no hearing aid =117

Probability of major depressive disorder

Hearing aid

- 8% Very High
- 60% Medium
- 32% Very Low

Top 50% hearing loss, no hearing aid

- 16% Very High
- 60% Medium
- 24% Very Low

*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).
I believe that wearing hearing aids and staying active in conversations will help reduce my risk of getting dementia.

Dementia: Compared to impaired hearing aid non-owners with significant hearing loss (Top50% hearing loss group*), hearing aid owners believe that wearing HAs helps reduce risk of dementia.

*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: hearing aid n=629 / top 50% HL, no hearing aid =148

Australia specific question
General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top50% hearing loss group*), hearing aid owners feel less exhausted in the evenings.

*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).
Are you generally satisfied with the quality of your sleep?

- **Top 50% hearing loss, no hearing aid (n=117)**
  - Yes: 31%
  - No: 69%

- **Hearing aid (n=439)**
  - Yes: 62%
  - No: 38%

General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids.
33% 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: 33%
- Sleeping disorder: 25%
- Dementia: 21%
- High blood pressure: 16%
- Diabetes: 12%
- Poor eyesight: 11%
- Back problems: 8%
- Hearing loss is not linked to any of those health issues: 43%

Hearing impaired, n=1'325
3. Analysis of hearing aid owners
Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
Low adoption rates within mild hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profound</td>
<td>(4%)</td>
<td>2% 2%</td>
</tr>
<tr>
<td>Severe</td>
<td>(17%)</td>
<td>5% 12%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(48%)</td>
<td>25% 23%</td>
</tr>
<tr>
<td>Mild</td>
<td>(31%)</td>
<td>23% 8%</td>
</tr>
</tbody>
</table>

Adoption rate %

67%*

47%

27%

Base: n=1,325
Sums can differ from 100% due to rounding
* combined "severe" and "profound" because n is too small

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65% of the currently owned HAs were acquired in 2019 or later. RIC is the most often purchase type of HA.

Age of currently owned HAs (Mean):
2021: 2.8 years
2017: 3.0 years
On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 5 years before they are being replaced.

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

- 16% 1 year
- 29% 2 years
- 28% 3 years
- 16% 4-6 years
- 12% more than 6 years

Base: n=397

Age of HA before it has been replaced:
2021: 5 years (median)
2017: 5 years (median)
42% of current owners think that their HAs should be upgraded to the latest technology every 2-3 years.

With technology advancing so quickly, how often do you believe that you need to upgrade your hearing aid to the latest technology?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Every 2 years</td>
<td>21%</td>
</tr>
<tr>
<td>Every 3 years</td>
<td>21%</td>
</tr>
<tr>
<td>Every 4 years</td>
<td>14%</td>
</tr>
<tr>
<td>Every 5 years</td>
<td>19%</td>
</tr>
<tr>
<td>Every 6 years</td>
<td>3%</td>
</tr>
<tr>
<td>Less often</td>
<td>3%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>20%</td>
</tr>
</tbody>
</table>

HA-owner, n=685
76% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

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

- Yes: 76%
- No: 24%

HA-owner, n=685

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: 58%
- Better mental/emotional health: 48%
- Better performance at work: 35%
- Less fatigue in the evening: 24%
- Other opportunity: 6%

Base: n=522
80% received some kind of 3rd party reimbursement. Information deficit non-owners: only 23% know whether government/insurance would pay

**Owners:** For the purchase of your hearing aid and for hearing services, which of these best describes how you paid for them?

- Government paid the full price for the hearing aid
- Government paid a contribution and I paid the rest
- I got my hearing aid with workers compensation
- DVA paid the full price
- I paid in full
- 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?
Choice to self-fund on top of the government subsidy is seen as very or moderately important by 86% of the hearing impaired.

How important do you think it is that pensioners have the choice to self-fund on top of the government subsidy, if they wish to access more advanced hearing aid features?

- Very important: 58%
- Moderately important: 28%
- Slightly important: 10%
- Not at all important: 4%

Hearing impaired, n=1'325
Hearing Aid Clinics are by far the preferred place for obtaining hearing aids (both for owners and non owners).

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

- Hearing Aid Clinic: 75%
- Hospital: 15%
- ENT: 7%
- Online/mail order: 1%
- Other: 2%

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

- Hearing Aid Clinic: 73%
- Hospital: 6%
- ENT: 12%
- Online/mail order: 2%
- Other: 6%

HA-owner, n=685

HA-non-owner, n=640
Location and GP were most important factors for choosing the hearing aid clinic.

How important were the following factors in your decision to choose your hearing aid clinic?

- Location of hearing aid clinic: 5% Not at all important, 6% Slightly important, 20% Moderately important, 35% Very important, 33% Extremely important
- GP/family doctor: 17% Not at all important, 8% Slightly important, 18% Moderately important, 28% Very important, 29% Extremely important
- Recommendation by friend/family/colleague: 30% Not at all important, 12% Slightly important, 22% Moderately important, 17% Very important, 19% Extremely important
- Hearing test advertising: 33% Not at all important, 16% Slightly important, 18% Moderately important, 14% Very important, 19% Extremely important
- Internet information: 40% Not at all important, 14% Slightly important, 16% Moderately important, 17% Very important, 14% Extremely important

HA-owner who purchased at hearing aid clinic, n=531
NPS place of purchase

Recommendation intention of the place where the hearing aid(s) have been obtained is good, with a positive NPS score of 26.

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 place of purchase

Recommendation intention of the place where the hearing aid(s) have been obtained is good, with a positive NPS score of 26.

NPS = PROMOTERS – DETRACTORS = 26
NPS Hearing aids
Recommendation intention of hearing aids is also good, with a positive NPS score of 24.

And how likely would you be to recommend hearing aids to a friend or colleague?

**NPS = PROMOTERS – DETRACTORS = 24**

HA-owner, n=685
On average, HAs are worn 6.8 hours a day

How many hours a day are HA worn?

- In the drawer (0 hours):
  - 2021: 8%
  - 2017: 10%

- HA worn: 2021 Mean: 6.8 hours/day
  2017 Mean: 6.6 hours/day
56% of today’s hearing aid owners are aware of their hearing aid brand (brand awareness has increased since 2017).

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

- Yes, I know it by heart: 56%
- No, but I could find out: 15%
- No, and can't find out: 29%

2017: 33%

HA-owner, n=685
44% of the HA owners use an accessory/app for their hearing aids, 76% of those 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=685)

- 57% Yes
- 34% No
- 9% don't know / no answer

Do you personally use accessories for your hearing aids (TV-Streamer/ Apps / Remote Control / etc.)? (HA owners, n=685)

- 44% Yes
- 56% No

IF ACCESSORIES USED (n=290):
Overall, how satisfied with the performance of your accessory(s)?

- 8% very dissatisfied
- 4% dissatisfied
- 5% somewhat dissatisfied
- 7% neutral
- 12% somewhat satisfied
- 29% satisfied
- 35% very satisfied
19% of the HA owners have already used remote fitting, but also more than half of them have never heard of it. 27% claim that they are more likely to use remote fitting because of the Covid-19 pandemic.

Have you ever heard of Remote fitting for your hearing aids? (Remote fitting: enables your hearing care professional to fit and fine-tune hearing aids from a distance (in real-time via video chat via an app), so that you don't need to leave your house to get your hearing aids adjusted)

- Yes, I have used it
- Heard of it but never used it
- No, never heard of it

HA-owner, n=685

Does the current Covid-19 pandemic have an impact on your intention to use remote fitting for your hearing aids?

- Yes, more likely to use remote fitting
- Yes, less likely to use remote fitting
- No impact

Australia specific questions
Satisfaction with hearing aids and drivers
87% of the hearing aid owners say their hearing aid works better than or as expected.

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

- Hearing aids work better than I expected: 44%
- Hearing aids work as I expected: 43%
- Hearing aids work worse than I expected: 13%

Base: n=685
Overall satisfaction with HA: 77% of hearing aid owners are satisfied with their hearing aid(s)
Satisfaction with current hearing aids

Professionalism of HA clinician
Quality of HA clinician's counseling
Quality of service during hearing aid fitting period
Quality of service after purchase

Clearness of tone and sound
Natural sounding
Richness or fidelity of sound
Comfort with loud sounds

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

*% of satisfied HA owners compared to 2017

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### Satisfaction with current hearing aids

#### Listening situation

<table>
<thead>
<tr>
<th>Situation</th>
<th>Dissatisfied</th>
<th>Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation with one Person</td>
<td>10%</td>
<td>83%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>8%</td>
<td>81%</td>
</tr>
<tr>
<td>At home with family members</td>
<td>10%</td>
<td>80%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>11%</td>
<td>80%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>10%</td>
<td>80%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>11%</td>
<td>79%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>12%</td>
<td>79%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>9%</td>
<td>79%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>9%</td>
<td>78%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>13%</td>
<td>78%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>13%</td>
<td>77%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>13%</td>
<td>77%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>13%</td>
<td>77%</td>
</tr>
<tr>
<td>In a larger lecture hall</td>
<td>13%</td>
<td>76%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>12%</td>
<td>73%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>10%</td>
<td>73%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>19%</td>
<td>71%</td>
</tr>
</tbody>
</table>

#### Trend* (2017 vs. 2021)

<table>
<thead>
<tr>
<th>Situation</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation with one Person</td>
<td>+5%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>+9%</td>
</tr>
<tr>
<td>At home with family members</td>
<td>+10%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>+10%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>+13%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>+8%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>+13%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>+11%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>+13%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>+10%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>+15%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>+10%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>+15%</td>
</tr>
<tr>
<td>In a larger lecture hall</td>
<td>+15%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>+9%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>+16%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>+13%</td>
</tr>
</tbody>
</table>

*Trend calculated as percentage of satisfied HA owners compared to 2017.

*Satisfaction with current hearing aids:

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

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

<table>
<thead>
<tr>
<th>HA Clinician</th>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of service during hearing aid fitting period</td>
<td>0.63</td>
</tr>
<tr>
<td>Quality of service after purchase</td>
<td>0.63</td>
</tr>
<tr>
<td>Quality of Hearing Aid Clinicians counseling</td>
<td>0.60</td>
</tr>
<tr>
<td>Professionalism of Hearing Aid Clinician</td>
<td>0.56</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sound quality signal process.</th>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clearness of tone and sound</td>
<td>0.73</td>
</tr>
<tr>
<td>Richness or fidelity of sound</td>
<td>0.71</td>
</tr>
<tr>
<td>Natural sounding</td>
<td>0.69</td>
</tr>
<tr>
<td>Comfort with loud sounds</td>
<td>0.68</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product features</th>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliability</td>
<td>0.72</td>
</tr>
<tr>
<td>Value (performance versus money spent)</td>
<td>0.67</td>
</tr>
<tr>
<td>Overall fit/ Comfort</td>
<td>0.64</td>
</tr>
<tr>
<td>Ease of changing battery</td>
<td>0.61</td>
</tr>
<tr>
<td>Managing whistling/feedback/buzzing</td>
<td>0.58</td>
</tr>
<tr>
<td>Battery life</td>
<td>0.57</td>
</tr>
<tr>
<td>Visibility to others</td>
<td>0.56</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Situation</th>
<th>Hearing loss Total (n=1'325)</th>
<th>Hearing aid (n=685)</th>
<th>Hearing loss but no hearing aid (n=640)</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home with family members</td>
<td>48%</td>
<td>44%</td>
<td>40%</td>
</tr>
<tr>
<td>When talking on a phone</td>
<td>48%</td>
<td>42%</td>
<td>39%</td>
</tr>
<tr>
<td>When watching TV with others</td>
<td>40%</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>In noisy situations</td>
<td>40%</td>
<td>38%</td>
<td>35%</td>
</tr>
<tr>
<td>In conversations with small groups</td>
<td>36%</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>In conversations with 1 person</td>
<td>35%</td>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td>In conversations with large groups</td>
<td>34%</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>22%</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>22%</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>18%</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>13%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>When listening to music</td>
<td>13%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>In a larger lecture hall (e.g., theater, concert hall, place...)</td>
<td>13%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>11%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>During leisure activities (e.g., exercising, taking a walk,...)</td>
<td>10%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>9%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>8%</td>
<td>8%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially Communication effectiveness, ability to participate in group activities and relationship at work improve with hearing aids.

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

Overall ability to communicate more effectively in most situations
- 6% a lot worse
- 23% worse
- 41% the same
- 28% better
- 22% a lot better

Ability to participate in group activities
- 6% a lot worse
- 29% worse
- 35% the same
- 27% better
- 28% a lot better

Relationships at work
- 6% a lot worse
- 36% worse
- 29% the same
- 27% better
- 22% a lot better

Sense of safety
- 6% a lot worse
- 39% worse
- 30% the same
- 26% better
- 23% a lot better

Confidence in yourself
- 6% a lot worse
- 37% worse
- 31% the same
- 24% better
- 23% a lot better

Relationships at home
- 6% a lot worse
- 40% worse
- 29% the same
- 25% better
- 22% a lot better

Sense of independence
- 4% a lot worse
- 39% worse
- 29% the same
- 24% better
- 22% a lot better

Social life
- 6% a lot worse
- 42% worse
- 26% the same
- 24% better
- 22% a lot better

Feelings about yourself
- 6% a lot worse
- 43% worse
- 29% the same
- 20% better
- 21% a lot better

Mental/Emotional health
- 6% a lot worse
- 43% worse
- 29% the same
- 20% better
- 21% a lot better

Mental ability
- 5% a lot worse
- 45% worse
- 27% the same
- 21% better
- 22% a lot better

Physical health
- 6% a lot worse
- 49% worse
- 21% the same
- 22% better
- 22% a lot better

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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=219)  Top 50% hearing loss (n=390)
Most hearing aid owners feel more confident moving in a city since wearing hearing aids!

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

- Yes: 72%
- No: 28%

Base: n=685
Also for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids.

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

- Communication with Person:
  - A lot worse: 3%
  - Worse: 8%
  - The same: 28%
  - Better: 30%
  - A lot better: 31%

- Social activities together with Person:
  - A lot worse: 3%
  - Worse: 6%
  - The same: 39%
  - Better: 28%
  - A lot better: 24%

- Personal relationship with Person:
  - A lot worse: 2%
  - Worse: 5%
  - The same: 43%
  - Better: 26%
  - A lot better: 24%

- Quarrels/disputes with Person:
  - A lot worse: 3%
  - Worse: 7%
  - The same: 45%
  - Better: 24%
  - A lot better: 21%

Someone in HH / parent has HA, n=653
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?

- 47% Regularly
- 32% Occasionally
- 16% Rarely
- 6% Never

Base: n=685
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=685</th>
<th>HA-Non-owner Low 50% HL n=312</th>
<th>Non-owner Top 50% HL n=180</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired (stated)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>27%</td>
<td>39%</td>
<td>37%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>73%</td>
<td>61%</td>
<td>63%</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>12%</td>
</tr>
<tr>
<td>Moderate</td>
<td>51%</td>
<td>45%</td>
<td>58%</td>
</tr>
<tr>
<td>Severe</td>
<td>26%</td>
<td>4%</td>
<td>22%</td>
</tr>
<tr>
<td>Profound</td>
<td>4%</td>
<td>1%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Likely to have a hearing aid</th>
<th>Somewhat likely to have a hearing aid</th>
<th>Not likely to have a hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cannot afford a hearing aid</td>
<td>53%</td>
<td>11%</td>
<td>36%</td>
</tr>
<tr>
<td>Hear well enough in most situations</td>
<td>37%</td>
<td>26%</td>
<td>37%</td>
</tr>
<tr>
<td>Have more serious priorities</td>
<td>43%</td>
<td>19%</td>
<td>37%</td>
</tr>
<tr>
<td>Uncomfortable</td>
<td>38%</td>
<td>18%</td>
<td>44%</td>
</tr>
<tr>
<td>They do not work well in noisy situations</td>
<td>34%</td>
<td>22%</td>
<td>44%</td>
</tr>
<tr>
<td>Hearing loss not severe enough</td>
<td>34%</td>
<td>21%</td>
<td>45%</td>
</tr>
<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>39%</td>
<td>13%</td>
<td>48%</td>
</tr>
<tr>
<td>They do not restore your hearing to normal</td>
<td>35%</td>
<td>16%</td>
<td>49%</td>
</tr>
<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>35%</td>
<td>14%</td>
<td>51%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>40%</td>
<td>8%</td>
<td>51%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=180
## Less important reasons for not having a hearing aid (II/II)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Not a reason</th>
<th>Somewhat a reason</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bad design</td>
<td>52%</td>
<td>17%</td>
<td>31%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>56%</td>
<td>12%</td>
<td>32%</td>
</tr>
<tr>
<td>Ear doctors opinion (ENT)</td>
<td>56%</td>
<td>11%</td>
<td>33%</td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>58%</td>
<td>7%</td>
<td>36%</td>
</tr>
<tr>
<td>Have hearing loss in one ear</td>
<td>58%</td>
<td>11%</td>
<td>31%</td>
</tr>
<tr>
<td>Hearing Aid Clinician’s opinion</td>
<td>62%</td>
<td>11%</td>
<td>27%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>63%</td>
<td>9%</td>
<td>28%</td>
</tr>
<tr>
<td>Family doctors opinion (GP)</td>
<td>64%</td>
<td>9%</td>
<td>27%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>66%</td>
<td>9%</td>
<td>25%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>68%</td>
<td>10%</td>
<td>22%</td>
</tr>
<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>68%</td>
<td>9%</td>
<td>23%</td>
</tr>
<tr>
<td>Another hearing aid owners opinion</td>
<td>69%</td>
<td>11%</td>
<td>20%</td>
</tr>
<tr>
<td>Do not trust Hearing Aid Clinician/Audiologist</td>
<td>71%</td>
<td>11%</td>
<td>18%</td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td>71%</td>
<td>7%</td>
<td>22%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>72%</td>
<td>8%</td>
<td>20%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>76%</td>
<td>7%</td>
<td>17%</td>
</tr>
<tr>
<td>Had surgery - hearing aids wont help</td>
<td>81%</td>
<td>4%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=180
Top 10 reasons for HA owners NOT using them

- Uncomfortable: 53% Reason, 21% Somewhat a reason, 26% Not a reason
- They do not work well in noisy situations: 53% Reason, 18% Somewhat a reason, 29% Not a reason
- They do not restore your hearing to normal: 58% Reason, 8% Somewhat a reason, 34% Not a reason
- Hear well enough in most situations: 43% Reason, 19% Somewhat a reason, 38% Not a reason
- Bad design: 48% Reason, 9% Somewhat a reason, 42% Not a reason
- Have tried hearing aid and they do not work: 40% Reason, 16% Somewhat a reason, 44% Not a reason
- Have more serious priorities: 36% Reason, 14% Somewhat a reason, 50% Not a reason
- Hearing loss not severe enough: 34% Reason, 12% Somewhat a reason, 54% Not a reason
- Have tinnitus (ringing in ears): 30% Reason, 14% Somewhat a reason, 57% Not a reason
- Have Sensor-neural hearing loss (nerve deafness): 17% Reason, 18% Somewhat a reason, 64% Not a reason

Owners who don't use, n=56 (low sample)
Social rejection because of hearing loss compared to the acceptance of hearing aids
55% 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?

Base: n=685

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

Base: Top 50% hearing loss, no hearing aid n=180
Most important triggers to buy
The most important influencing factors are worsening hearing loss, HA Clinician, doctors and spouse (+price, insurance coverage for the non owners)

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

**Non-owner:** What do you think would influence you to obtain / purchase a hearing aid?
The most important trigger to buy a hearing aid is the HA Clinician, followed by worsening hearing loss and the spouse.
### 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>7291</td>
<td>12.7%</td>
<td>45.0%</td>
<td>49.2%</td>
<td>53.3%</td>
<td>53.9%</td>
</tr>
<tr>
<td>Female</td>
<td>7379</td>
<td>10.9%</td>
<td>44.4%</td>
<td>50.8%</td>
<td>46.7%</td>
<td>46.1%</td>
</tr>
<tr>
<td>Age recoded</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>2737</td>
<td>3.9%</td>
<td>66.3%</td>
<td>20.3%</td>
<td>3.8%</td>
<td>9.1%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1879</td>
<td>4.4%</td>
<td>43.3%</td>
<td>13.9%</td>
<td>4.9%</td>
<td>4.6%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>2167</td>
<td>7.5%</td>
<td>56.3%</td>
<td>15.5%</td>
<td>7.4%</td>
<td>11.8%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1994</td>
<td>7.0%</td>
<td>46.8%</td>
<td>14.3%</td>
<td>7.7%</td>
<td>8.4%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>1871</td>
<td>13.0%</td>
<td>30.1%</td>
<td>12.6%</td>
<td>17.8%</td>
<td>9.4%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1654</td>
<td>17.1%</td>
<td>28.3%</td>
<td>10.6%</td>
<td>21.2%</td>
<td>10.3%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1351</td>
<td>25.2%</td>
<td>43.0%</td>
<td>7.8%</td>
<td>20.3%</td>
<td>18.9%</td>
</tr>
<tr>
<td>74+</td>
<td>1018</td>
<td>36.9%</td>
<td>56.5%</td>
<td>5.0%</td>
<td>17.0%</td>
<td>27.4%</td>
</tr>
<tr>
<td>Type of household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>single household</td>
<td>1437</td>
<td>21.1%</td>
<td>44.6%</td>
<td>8.8%</td>
<td>17.5%</td>
<td>17.4%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>2840</td>
<td>16.9%</td>
<td>45.4%</td>
<td>18.2%</td>
<td>27.3%</td>
<td>28.1%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>7081</td>
<td>7.6%</td>
<td>48.7%</td>
<td>50.5%</td>
<td>29.7%</td>
<td>34.8%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>1396</td>
<td>9.1%</td>
<td>40.6%</td>
<td>9.8%</td>
<td>7.8%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>231</td>
<td>36.8%</td>
<td>52.2%</td>
<td>1.1%</td>
<td>4.2%</td>
<td>5.7%</td>
</tr>
<tr>
<td>Other</td>
<td>1685</td>
<td>11.0%</td>
<td>30.5%</td>
<td>11.6%</td>
<td>13.5%</td>
<td>7.3%</td>
</tr>
</tbody>
</table>

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

## Count, Hearing difficulty, Hearing aid adoption rate % (Base=hearing impaired)

<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head of the household (alone or together with someone)</td>
<td>6'898</td>
<td>16.9%</td>
<td>44.7%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>2'728</td>
<td>12.2%</td>
<td>53.1%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>3'858</td>
<td>2.6%</td>
<td>35.3%</td>
</tr>
<tr>
<td>Other person</td>
<td>1'185</td>
<td>11.2%</td>
<td>30.7%</td>
</tr>
<tr>
<td>Full time employed</td>
<td>4'635</td>
<td>10.2%</td>
<td>40.6%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>1'857</td>
<td>9.1%</td>
<td>36.1%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>1'744</td>
<td>10.8%</td>
<td>33.1%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>639</td>
<td>28.4%</td>
<td>46.1%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>341</td>
<td>23.1%</td>
<td>41.1%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>1'785</td>
<td>28.6%</td>
<td>51.5%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>725</td>
<td>3.2%</td>
<td>33.5%</td>
</tr>
<tr>
<td>Incomplete Secondary Education</td>
<td>1'765</td>
<td>19.4%</td>
<td>42.5%</td>
</tr>
<tr>
<td>Secondary Education Completed</td>
<td>2'612</td>
<td>13.7%</td>
<td>36.4%</td>
</tr>
<tr>
<td>Vocational or Professional Certification Completed</td>
<td>1'846</td>
<td>15.2%</td>
<td>38.2%</td>
</tr>
<tr>
<td>Some University or Vocational Certification</td>
<td>1'090</td>
<td>11.4%</td>
<td>45.3%</td>
</tr>
<tr>
<td>University Education Completed</td>
<td>2'411</td>
<td>10.2%</td>
<td>44.8%</td>
</tr>
<tr>
<td>Postgraduate Education Completed</td>
<td>1'396</td>
<td>13.2%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Doctorate, Post-doctorate or equivalent Completed</td>
<td>311</td>
<td>15.6%</td>
<td>58.4%</td>
</tr>
<tr>
<td>Other</td>
<td>496</td>
<td>13.5%</td>
<td>28.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>44.3%</td>
<td>67.3%</td>
<td>67.4%</td>
</tr>
<tr>
<td>18.5%</td>
<td>16.3%</td>
<td>22.8%</td>
</tr>
<tr>
<td>29.1%</td>
<td>6.8%</td>
<td>4.6%</td>
</tr>
<tr>
<td>8.1%</td>
<td>9.6%</td>
<td>5.3%</td>
</tr>
<tr>
<td>41.2%</td>
<td>30.5%</td>
<td>27.3%</td>
</tr>
<tr>
<td>16.7%</td>
<td>11.7%</td>
<td>8.7%</td>
</tr>
<tr>
<td>15.4%</td>
<td>13.6%</td>
<td>8.9%</td>
</tr>
<tr>
<td>4.5%</td>
<td>10.6%</td>
<td>11.9%</td>
</tr>
<tr>
<td>2.6%</td>
<td>5.0%</td>
<td>4.6%</td>
</tr>
<tr>
<td>12.8%</td>
<td>26.9%</td>
<td>37.5%</td>
</tr>
<tr>
<td>6.9%</td>
<td>1.7%</td>
<td>1.1%</td>
</tr>
<tr>
<td>14.1%</td>
<td>21.4%</td>
<td>20.7%</td>
</tr>
<tr>
<td>22.3%</td>
<td>24.0%</td>
<td>19.7%</td>
</tr>
<tr>
<td>13.8%</td>
<td>18.8%</td>
<td>13.6%</td>
</tr>
<tr>
<td>9.6%</td>
<td>7.4%</td>
<td>8.1%</td>
</tr>
<tr>
<td>21.4%</td>
<td>14.8%</td>
<td>15.8%</td>
</tr>
<tr>
<td>12.0%</td>
<td>8.2%</td>
<td>15.4%</td>
</tr>
<tr>
<td>2.6%</td>
<td>2.2%</td>
<td>4.0%</td>
</tr>
<tr>
<td>4.2%</td>
<td>5.2%</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

*Small sample sizes in some categories*
Sample size and random sample error: Rules of thumb

READ: At a sample size of n=500 and a value of 15% we would expect the real value in an interval $\pm 3.1$ 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>$\pm 13.9$</td>
</tr>
<tr>
<td>100</td>
<td>$\pm 9.8$</td>
</tr>
<tr>
<td>250</td>
<td>$\pm 6.2$</td>
</tr>
<tr>
<td>500</td>
<td>$\pm 4.4$</td>
</tr>
<tr>
<td>1'000</td>
<td>$\pm 3.1$</td>
</tr>
<tr>
<td>5'000</td>
<td>$\pm 1.4$</td>
</tr>
<tr>
<td>10'000</td>
<td>$\pm 1.0$</td>
</tr>
</tbody>
</table>
Sample description: Region, inhabitants

<table>
<thead>
<tr>
<th>State / Territory</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australian Capital Territory</td>
<td>2%</td>
</tr>
<tr>
<td>New South Wales</td>
<td>33%</td>
</tr>
<tr>
<td>Northern Territory</td>
<td>1%</td>
</tr>
<tr>
<td>Queensland</td>
<td>19%</td>
</tr>
<tr>
<td>South Australia</td>
<td>8%</td>
</tr>
<tr>
<td>Tasmania</td>
<td>3%</td>
</tr>
<tr>
<td>Victoria</td>
<td>28%</td>
</tr>
<tr>
<td>Western Australia</td>
<td>7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Inhabitants</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10 000</td>
<td>13%</td>
</tr>
<tr>
<td>More than 10 000, less than 50 000</td>
<td>20%</td>
</tr>
<tr>
<td>More than 50 000, less than 500 000</td>
<td>26%</td>
</tr>
<tr>
<td>More than 500 000, less than 1 mio</td>
<td>11%</td>
</tr>
<tr>
<td>More than 1 mio</td>
<td>29%</td>
</tr>
</tbody>
</table>