Results

EuroTrak Belgium 2021

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

EuroTrak Belgium 2021 is part of the EuroTrak / APACTrak studies:

EuroTrak Belgium 2021 was designed and executed by Anovum (Zurich) on behalf of beMedTech and EHIMA.

Sample sizes:
Representative sample (sample 1): n=14'475 people

Hearing impaired (sample 2):
    HA owners: n= 543 people
    Hearing impaired non-owners: n= 757 people
Summary
2. Market overview

• Stated hearing loss prevalence
  – Total: 9.4%, 18+: 11.2% (2017: 9.6%, 18+: 11.5%).
  – Hearing Tests: 32% (2017: 34%) had a hearing test in the last 5 years, most tests done by ENTs.

• Hearing aid adoption rate (HA penetration)
  – 33.6% of those with self declared HL (2017: 30.7%).
  – 3.2% of total population (2017: 3.0%).
  – 83% of HA owners have binaural treatment (2017: 80%).

• The route to the hearing aid
  – 72% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  – 46% got positive medical advice from the ENT or family doctor (drop out rate=36% / 2017: 43%).
  – 74% of the GP consultations referred to an ENT, 11% recommended no action (2017: 19%).
  – 27% of ENT consultations referred to an audicien, 42% recommended to get a hearing aid, 37% recommended no action (2017: 42%).

• Potential social cost-savings due to the use of hearing aids
  – Hearing aids are believed to have a positive impact on the job.
  – Hearing aid owners have a lower risk of being depressed.
  – Quality of sleep seems to improve if hearing impaired use hearing aids.
Summary

3. Analysis of hearing aid owners

- **Hearing aid ownership, usage and accessories**
  - 52% of the currently owned HAs were bought in 2019 or later.
  - The average age of the currently owned HAs is 3.4 years.
  - The median age of hearing aids before replacement is 6 years.
  - On average, HAs are worn 8.9 hours a day.
  - 55% of today’s hearing aid owners are aware of their hearing aid brand.
  - 28% of the HA owners use an accessory/app for their hearing aids, 71% of those are satisfied with it.

- **Importance of listening situations and satisfaction with HAs**
  - 78% of the hearing aid owners say their hearing aid works better than or as expected
  - 82% of the HA owners are satisfied with their HAs (2017: 80%).
  - 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 and conversations 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 social life improve with hearing aids.
  - 97% 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 do not restore hearing to normal, they think that hearing aids are uncomfortable, they do not work well in noisy situations, they hear enough in most situations and hearing loss is not severe enough.
  - 5% who own hearing aids don’t use them at all (0 hours); 14% use them less than one hour/day (0-1 hour).

- Social rejection and triggers to buy
  - 79% 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 to get a hearing aid are worsening hearing loss, doctors and significant others (+price, insurance coverage for the current non owners).
Detailed Results: Roadmap

1. Introduction
   - Organisation of EuroTrak 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 EuroTrak 2021

**Organisation**
- Principal of the project EuroTrak 2021 is beMedTech.
- 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**
- beMedTech and EHIMA may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.

- The raw dataset remains at Anovum. If the principal uses the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
  "Source: Anovum – EuroTrak/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 panelist pools
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of \( n=14'475 \) 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: \( n=543 \) hearing aid owners and \( n=757 \) hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age
Hearing loss prevalence Belgium
Self declared hearing loss

% hearing loss prevalence

- Total
  - EuroTrak 2021: 9.4% 9.6%
  - EuroTrak 2017: 11.2% 11.5%

- Total 18+
  - EuroTrak 2021: 33.1% 33.7%
  - EuroTrak 2017: 11.2% 11.5%

- 74+
  - EuroTrak 2021: 19.0% 18.6%

- 65-74
  - EuroTrak 2021: 11.2% 11.7%
  - EuroTrak 2017: 9.5% 9.8%

- 55-64
  - EuroTrak 2021: 9.5% 9.8%
  - EuroTrak 2017: 6.0% 6.0%

- 45-54
  - EuroTrak 2021: 5.0% 3.7%
  - EuroTrak 2017: 2.9% 2.9%

- 35-44
  - EuroTrak 2021: 2.4% 2.4%
  - EuroTrak 2017: 2.4% 2.4%

- 25-34
  - EuroTrak 2021: 2.3% 2.3%
  - EuroTrak 2017: 2.9% 2.9%

- 15-24
  - EuroTrak 2021: 2.4% 2.4%
  - EuroTrak 2017: 2.4% 2.4%

- <=14
  - EuroTrak 2021: 2.3% 2.3%
  - EuroTrak 2017: 2.9% 2.9%

EuroTrak 2021 n=14'475
EuroTrak 2017 n=14'245
Hearing aid adoption rate: 34% of hearing impaired have hearing aid(s), 83% of them have binaural treatment.
Overview hearing loss prevalence and hearing aid adoption

EuroTrak Belgium 2021
- Hearing impaired (stated): 9.4%
- Adoption (% of population): 3.2%
- Adoption (% of stated impaired): 33.6%

EuroTrak Belgium 2017
- Hearing impaired (stated): 9.6%
- Adoption (% of population): 3.0%
- Adoption (% of stated impaired): 30.7%
The more severe the hearing loss, the higher the adoption rate

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

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

<table>
<thead>
<tr>
<th></th>
<th>HA-Non-owner n=757</th>
<th>HA Owner n=543</th>
<th>Hearing Aid Adoption (%)</th>
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<tbody>
<tr>
<td>Ears impaired</td>
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<td></td>
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<tr>
<td>(stated)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>37%</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>63%</td>
<td>83%</td>
<td>43%</td>
</tr>
<tr>
<td>Perceived loss</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>36%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Moderate</td>
<td>47%</td>
<td>46%</td>
<td>33%</td>
</tr>
<tr>
<td>Severe</td>
<td>13%</td>
<td>38%</td>
<td>57%*</td>
</tr>
<tr>
<td>Profound</td>
<td>4%</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

* combined “severe” and “profound” because n is too small
Hearing tests and where hearing is tested
Hearing Tests: 32% had a hearing test in the last 5 years (2017: 34%), most tests done by ENTs

Have you ever taken a hearing test?
- Yes, in the last 12 months: 20%
- Yes, in the last 1-5 years: 23%
- Yes, more than 5 years ago: 12%
- No, never: 46%

Where/how was your hearing tested?
- Ear doctor (ENT): 37%
- Centre auditif / Audioloog, Audicien: 28%
- Family doctor: 15%
- Online test, smartphone app: 2%
- Other: 21%
- DNK: 5%

Base=11'109

Base= 3'440

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The route to the hearing aid:
Sources of information and drop-out rates
Where did you gather information about hearing aids?

- Family doctor, ear doctor (ENT), Audiolooog/Audicien: 36%
- Internet research: combined (all three): 24%
- Conversations with friends, relatives already fitted with a hearing aid: 19%
- Internet research: websites of hearing aids manufacturers: 16%
- Internet research: other websites, google…: 14%
- Internet research: websites of hearing aid clinics: 11%
- Print ads received in your mailbox: 10%
- Articles in magazines or newspapers: 10%
- I did not gather information about hearing aids: 9%
- Other: 2%

Doctors/HCPs are the most important sources of information and therefore the major gatekeepers.
Of those who discussed the hearing loss with a doctor, 52% 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 Ear, Nose and Throat specialist (ENT)?
The route to the hearing aid

- Impaired: 100%
- Discussed hearing loss with ear doctor and/or family doctor: 72%
- Recommended hearing aid: 46%
- Discussed hearing loss with audiologist: 46%
- Positive advice audiologist: 38%
- Bought hearing aid: 34%

Drop out:
- 2017: 30%
- 2017: 43%
- 2017: 27%

Base: n=1'300
Construction of 6 groups: A factor analysis was performed to identify one factor “degree of hearing loss”. The following questions were included in the factor:

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

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

% Discussed with GP

<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>EuroTrak 2021</td>
<td>48%</td>
<td>60%</td>
<td>43%</td>
</tr>
<tr>
<td>EuroTrak 2017</td>
<td>44%</td>
<td>57%</td>
<td>38%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (Base: n = 307)**
- Referred to an ear doctor (ENT): 76%
- Referred to an Audicen: 18%
- Recommended to get a hearing aid: 16%
- Recommended no further action: 2%

**Impaired non-owner (Base: n = 299)**
- Referred to an ear doctor (ENT): 72%
- Referred to an Audicen: 11%
- Recommended to get a hearing aid: 7%
- Recommended no further action: 18%
The route to the hearing aid: ENT
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

<table>
<thead>
<tr>
<th>% Discussed with ENT</th>
<th>Total hearing impaired</th>
<th>HA owner</th>
<th>Hearing impaired non-owners</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>61%</td>
<td>86%</td>
<td>49%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (Base: n = 436)**

- Referred to an Audicien: 36%
- Did prescribe a hearing aid: 72%
- Recommended no further action: 4%

**Impaired non-owner (Base: n = 343)**

- Referred to an Audicien: 20%
- Did prescribe a hearing aid: 16%
- Recommended no further action: 67%

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The route to the hearing aid: Audicien
Have you ever discussed your hearing problem with an audicien?

% Discussed with audicien

<table>
<thead>
<tr>
<th>Total hearing impaired</th>
<th>HA owner</th>
<th>Hearing impaired non-owners</th>
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<tr>
<td><strong>EuroTrak 2021</strong></td>
<td><strong>EuroTrak 2017</strong></td>
<td></td>
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<tr>
<td>n = 1'300</td>
<td>n = 1'307</td>
<td></td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (Base: n = 461)**
- Recommended to get a hearing aid: 98%
- Recommended not to get a hearing aid: 2%

**Impaired non-owner (Base: n = 182)**
- Recommended to get a hearing aid: 56%
- Recommended not to get a hearing aid: 44%
Recommendations by profession

- **GP**
  - Referred to an ear doctor (ENT): 74%
  - Referred to an audicien: 14%
  - Recommended to get a hearing aid: 11%
  - Recommended no further action: 11%

- **ENT**
  - Referred to an ear doctor (ENT): 42%
  - Referred to an audicien: 27%
  - Recommended to get a hearing aid: 37%
  - Recommended no further action: 17%

- **Audicien**
  - Referred to an ear doctor (ENT): 83%
  - Referred to an audicien: 17%
  - Recommended to get a hearing aid: 0%
  - Recommended no further action: 0%

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Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities
Work competitiveness: 95% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?

- Of no use: 5%
- Of some use: 31%
- Of significant use: 64%

Base: n=89
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

Disagree strongly | Rather disagree | Neutral | Rather agree | Strongly agree
--- | --- | --- | --- | ---
Hearing aid | 11% | 15% | 35% | 27% | 12%
Hearing loss, no hearing aid | 28% | 24% | 29% | 13% | 6%

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

Disagree strongly | Rather disagree | Neutral | Rather agree | Strongly agree
--- | --- | --- | --- | ---
Hearing aid | 9% | 11% | 36% | 31% | 12%
Hearing loss, no hearing aid | 26% | 26% | 27% | 15% | 6%

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

Disagree strongly | Rather disagree | Neutral | Rather agree | Strongly agree
--- | --- | --- | --- | ---
Hearing aid | 13% | 18% | 41% | 22% | 7%
Hearing loss, no hearing aid | 29% | 26% | 32% | 10% | 5%

Base: Hearing loss, no hearing aid n=481/ hearing aid n=329
General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*).

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

Probability of major depressive disorder

<table>
<thead>
<tr>
<th>Hearing aid 16%</th>
<th>42%</th>
<th>57%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>4%</td>
<td>67%</td>
</tr>
</tbody>
</table>

Base: hearing aid n=375 / top 50% HL, no hearing aid =138

*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).
In the evenings I often feel physically exhausted
In the evenings I often feel mentally exhausted

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).
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=138)**
  - Yes: 51%
  - No: 49%

- **Hearing aid (n=375)**
  - Yes: 72%
  - No: 28%
Hearing impaired think that depression and sleeping disorders are most likely linked to one’s hearing loss

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

- Depression: 15%
- Sleeping disorder: 14%
- High blood pressure: 8%
- Dementia: 5%
- Poor eyesight: 5%
- Back problems: 4%
- Diabetes: 4%
- Hearing loss is not linked to any of those health issues: 69%

Hearing impaired, n=1’300
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>
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<tbody>
<tr>
<td>Profound</td>
<td>(5%)</td>
<td>3%</td>
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<td></td>
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<td>57%*</td>
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<tr>
<td>Severe</td>
<td>(22%)</td>
<td>9%</td>
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<td></td>
<td>13%</td>
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<tr>
<td>Moderate</td>
<td>(47%)</td>
<td>31%</td>
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<td>15%</td>
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<tr>
<td>Mild</td>
<td>(27%)</td>
<td>24%</td>
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<td>3%</td>
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</table>

Base: n=1'300
Sums can differ from 100% due to rounding
* combined “severe” and “profound” because n is too small

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52% of the currently owned HAs were acquired in 2019 or later. RIC is the most often purchase type of HA.

**Year of purchase**

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<tbody>
<tr>
<td>2021</td>
<td>20%</td>
<td>31%</td>
<td>52%</td>
<td>67%</td>
<td>79%</td>
<td>87%</td>
<td>92%</td>
<td>94%</td>
<td>94%</td>
<td>96%</td>
<td>98%</td>
<td>100%</td>
</tr>
<tr>
<td>2017</td>
<td>0%</td>
<td>10%</td>
<td>20%</td>
<td>30%</td>
<td>40%</td>
<td>50%</td>
<td>60%</td>
<td>70%</td>
<td>80%</td>
<td>90%</td>
<td>100%</td>
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</table>

**Type of HA**

- Behind the ear hearing aid with speaker in the ear connected by a thin wire: 63%
- Behind the ear hearing aid with a tube and earpiece: 19%
- In the ear hearing aid: 12%
- Other: 4%
- don't know: 2%

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

- 2021: 3.4 years
- 2017: 3.2 years
On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 6 years before they are being replaced.

Current HAs = first HAs?

- Yes: 33%
- No: 67%

HA-owner, n=543

How many years did you own your previous HAs?

- 1-3 years: 7%
- 4-6 years: 57%
- 7-10 years: 30%
- 11 years or longer: 6%

Base: n=168

Age of HA before it has been replaced:
- 2021: 6 years (median)
- 2017: 5 years (median)

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

- 1 year: 19%
- 2 years: 28%
- 3 years: 23%
- 4-6 years: 18%
- more than 6 years: 12%

Base: n=332
57% 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: 57%
- No: 43%

HA-owner, n=543

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: 71%
- Better mental/emotional health: 35%
- Less fatigue in the evening: 27%
- Better performance at work: 17%
- Other opportunity: 4%

Base: n=317
82% received some kind of 3rd party reimbursement. Information deficit non-owners: Only 31% 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?

- 76% Yes, completely
- 14% Yes, partly
- 6% No
- 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?

- 31% Yes
- 57% No
- 12% don’t know

HA-owner, n=543

HA-non-owners, n=757
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?

- Specialized hearing aid store: 74%
- Optician: 12%
- Online: 5%
- Pharmacy: 1%
- Department store: 1%
- Other: 7%

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

- Specialized hearing aid store: 86%
- Optician: 7%
- Online: 1%
- Pharmacy: 1%
- Department store: 1%
- Other: 3%

HA-owner, n=543

HA-non-owner, n=757
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 23.

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 = 23

HA-owner, n=543
On average, HAs are worn 8.9 hours a day

How many hours a day are HA worn?

HA worn:
2021 Mean: 8.9 hours/day
2017 Mean: 9.4 hours/day

In the drawer (0 hours):
2021: 5%  
2017: 5%

HA-owner, n=543
55% 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: 55%
- No, but I could find out: 11%
- No, and can't find out: 34%

HA-owner, n=543
28% of the HA owners use an accessory/app for their hearing aids, 71% 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=543)

- 54% Yes
- 28% No
- 18% don't know / no answer

Do you personally use accessories for your hearing aids (TV-Streamer/Apps/Remote Control/etc.)? (HA owners, n=543)

- 28% Yes
- 72% No

**IF ACCESSORIES USED (n=155):**
Overall, how satisfied with the performance of your accessory(s)?

- 3% very dissatisfied
- 4% dissatisfied
- 10% somewhat dissatisfied
- 12% neutral
- 20% somewhat satisfied
- 30% satisfied
- 21% very satisfied
7% of the HA owners have already used remote fitting, but also more than half of them have never heard of it. 80% of those who used remote fitting were satisfied with the experience.

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 (51%)
- Heard of it but never used it (42%)
- No, never heard of it (7%)

Would you like the possibility of a remote fitting service (On Line) of the hearing aids?

- Strongly disagree (11%)
- Disagree (13%)
- Neutral (43%)
- Agree (25%)
- Strongly agree (8%)

Satisfaction with remote fitting of hearing aids:

- Very dissatisfied (3%)
- Dissatisfied (4%)
- Somewhat Dissatisfied (14%)
- Neutral (23%)
- Somewhat Satisfied (30%)
- Satisfied (27%)

have used remote fitting, n=38 (low sample)
Satisfaction with hearing aids and drivers
78% 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?

- 53% hearing aids work better than I expected
- 25% hearing aids work as I expected
- 22% hearing aids work worse than I expected

Base: n=543
Overall satisfaction with HA: 82% of hearing aid owners are satisfied with their hearing aid(s)
Satisfaction with current hearing aids

<table>
<thead>
<tr>
<th>Professionalism of Audicien</th>
<th>Quality of service during hearing aid fitting period</th>
<th>Quality of Audicien's counseling</th>
<th>Quality of service after purchase</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>89%</td>
<td>88%</td>
<td>87%</td>
<td>87%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Natural sounding</th>
<th>Clearness of tone and sound</th>
<th>Richness or fidelity of sound</th>
<th>Comfort with loud sounds</th>
</tr>
</thead>
<tbody>
<tr>
<td>9%</td>
<td>11%</td>
<td>10%</td>
<td>15%</td>
</tr>
<tr>
<td>78%</td>
<td>75%</td>
<td>75%</td>
<td>70%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ease of changing battery</th>
<th>Overall fit/ Comfort</th>
<th>Reliability</th>
<th>Visibility to others</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>8%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>88%</td>
<td>85%</td>
<td>84%</td>
<td>84%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Battery life</th>
<th>Managing whistling/feedback/buzzing</th>
<th>Value (performance versus money spent)</th>
</tr>
</thead>
<tbody>
<tr>
<td>13%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>76%</td>
<td>74%</td>
<td>72%</td>
</tr>
</tbody>
</table>

%_dissatisfied_ = % very dissatisfied + % dissatisfied + % somewhat dissatisfied
%_satisfied_ = % somewhat satisfied + % satisfied + % very satisfied

Trend*:
-4%  
-3%  
-4%  
-4%  
+/-0%  
+/-0%  
+2%  
-2%  
+/-0%  
+3%  
+/-0%  
+5%  
+/-0%

*% of satisfied HA owners compared to 2017
Satisfaction with current hearing aids

Listening situation

<table>
<thead>
<tr>
<th>Situation</th>
<th>% satisfied</th>
<th>% dissatisfied</th>
<th>Trend*</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home with family members</td>
<td>85%</td>
<td>7%</td>
<td>+3%</td>
</tr>
<tr>
<td>Conversation with one Person</td>
<td>84%</td>
<td>6%</td>
<td>-3%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>82%</td>
<td>7%</td>
<td>+7%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>81%</td>
<td>10%</td>
<td>+8%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>81%</td>
<td>10%</td>
<td>+8%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>80%</td>
<td>7%</td>
<td>+3%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>80%</td>
<td>9%</td>
<td>+5%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>80%</td>
<td>9%</td>
<td>+3%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>79%</td>
<td>12%</td>
<td>+11%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>77%</td>
<td>11%</td>
<td>+2%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>71%</td>
<td>12%</td>
<td>+10%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>70%</td>
<td>18%</td>
<td>+7%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>69%</td>
<td>12%</td>
<td>+3%</td>
</tr>
<tr>
<td>In a larger lecture hall</td>
<td>68%</td>
<td>18%</td>
<td>+8%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>67%</td>
<td>11%</td>
<td>+10%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>65%</td>
<td>21%</td>
<td>+12%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>61%</td>
<td>12%</td>
<td>+6%</td>
</tr>
</tbody>
</table>

*% of satisfied HA owners compared to 2017

**%dissatisfied** = % very dissatisfied + % dissatisfied + % somewhat dissatisfied

**%satisfied** = % somewhat satisfied + % satisfied + % very satisfied
Factors influencing satisfaction with current HA: Reliability/value and sound quality/signal processing are 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 Audicien’s counseling</td>
<td>0.55</td>
</tr>
<tr>
<td>Quality of service during hearing aid fitting period</td>
<td>0.55</td>
</tr>
<tr>
<td>Quality of service after purchase</td>
<td>0.54</td>
</tr>
<tr>
<td>Professionalism of Audicien</td>
<td>0.48</td>
</tr>
</tbody>
</table>

| Sound quality signal process.                                               |                                            |
| Natural sounding                                                            | 0.69                                       |
| Richness or fidelity of sound                                               | 0.68                                       |
| Clearness of tone and sound                                                 | 0.67                                       |
| Comfort with loud sounds                                                    | 0.64                                       |

| Product features                                                            |                                            |
| Reliability                                                                 | 0.75                                       |
| Value (performance versus money spent)                                      | 0.72                                       |
| Managing whistling/feedback/buzzing                                         | 0.63                                       |
| Overall fit/ Comfort                                                        | 0.57                                       |
| Visibility to others                                                        | 0.53                                       |
| Battery life                                                                | 0.51                                       |
| Ease of changing battery                                                    | 0.50                                       |

*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction, 1 means a maximal relationship. Read: Reliability is the most important criteria for satisfaction.
In which of these situations is it most important for you to hear well? 
(choose up to 5)

- At home with family members: 57% 
- When talking on a phone: 48% 
- In conversations with small groups: 42% 
- In conversations with 1 person: 40% 
- In conversations with large groups: 36% 
- In noisy situations: 32% 
- When watching TV with others: 29% 
- When talking to children: 22% 
- In the workplace: 21% 
- In a larger lecture hall (e.g., theater, concert hall, place...): 19% 
- When riding in a car: 16% 
- In a store, when shopping: 15% 
- When listening to music: 15% 
- During leisure activities (e.g., exercising, taking a walk,...): 9% 
- Outdoors: 9% 
- In school or a classroom (as an observer or student): 6% 
- At a movie theater: 4%

Hearing loss Total (n=1’300) 
Hearing aid (n=543) 
Hearing loss but no hearing aid (n=757)
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 social life 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>a lot worse</th>
<th>worse</th>
<th>the same</th>
<th>better</th>
<th>a lot better</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall ability to communicate more effectively in most situations</td>
<td>4%</td>
<td>20%</td>
<td>48%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Ability to participate in group activities</td>
<td>6%</td>
<td>31%</td>
<td>46%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Social life</td>
<td>2%</td>
<td>37%</td>
<td>40%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Sense of independence</td>
<td>3%</td>
<td>44%</td>
<td>36%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Feelings about yourself</td>
<td>3%</td>
<td>45%</td>
<td>36%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Confidence in yourself</td>
<td>3%</td>
<td>46%</td>
<td>34%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Relationships at home</td>
<td>3%</td>
<td>47%</td>
<td>33%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Sense of safety</td>
<td>4%</td>
<td>48%</td>
<td>33%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Relationships at work</td>
<td>7%</td>
<td>46%</td>
<td>34%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Mental/emotional health</td>
<td>4%</td>
<td>56%</td>
<td>28%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Physical health</td>
<td>3%</td>
<td>63%</td>
<td>23%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Mental ability</td>
<td>3%</td>
<td>65%</td>
<td>20%</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in most aspects

% of HA owners feeling better/a lot better

- Low 50% hearing loss (n=129)
- Top 50% hearing loss (n=350)
68% of the 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?

Base: n=543
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: 32% better, 35% the same, 22% worse
- Social activities together with Person: 50% the same, 27% better, 13% worse
- Personal relationship with Person: 62% the same, 19% better, 14% worse
- Quarrels/disputes with Person: 68% the same, 15% better, 10% worse

Someone in HH / parent has HA, n=420
97% 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?

- Regularly: 53%
- Occasionally: 34%
- Rarely: 10%
- Never: 3%

Base: n=543
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=543</th>
<th>HA-Non-owner Low 50% HL n=385</th>
<th>Non-owner Top 50% HL n=198</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>17%</td>
<td>41%</td>
<td>29%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>83%</td>
<td>59%</td>
<td>71%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>8%</td>
<td>46%</td>
<td>9%</td>
</tr>
<tr>
<td>Moderate</td>
<td>46%</td>
<td>48%</td>
<td>49%</td>
</tr>
<tr>
<td>Severe</td>
<td>38%</td>
<td>5%</td>
<td>33%</td>
</tr>
<tr>
<td>Profound</td>
<td>8%</td>
<td>1%</td>
<td>9%</td>
</tr>
</tbody>
</table>

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

- They do not restore your hearing to normal: 44% Reason, 18% Somewhat a reason, 38% Not a reason
- Uncomfortable: 35% Reason, 26% Somewhat a reason, 38% Not a reason
- They do not work well in noisy situations: 40% Reason, 20% Somewhat a reason, 39% Not a reason
- Hear well enough in most situations: 26% Reason, 28% Somewhat a reason, 47% Not a reason
- Hearing loss not severe enough: 34% Reason, 18% Somewhat a reason, 48% Not a reason
- Have more serious priorities: 30% Reason, 16% Somewhat a reason, 54% Not a reason
- Cannot afford a hearing aid: 37% Reason, 8% Somewhat a reason, 54% Not a reason
- Ear doctors opinion (ENT): 28% Reason, 15% Somewhat a reason, 56% Not a reason
- Have tinnitus (ringing in ears): 24% Reason, 16% Somewhat a reason, 60% Not a reason
- Audicien's opinion: 26% Reason, 12% Somewhat a reason, 63% Not a reason
### Less important reasons for not having a hearing aid (II/II)

<table>
<thead>
<tr>
<th>Reason</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
<th>70%</th>
<th>80%</th>
<th>90%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family doctors opinion (GP)</td>
<td>63%</td>
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<td></td>
<td></td>
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<tr>
<td>Another hearing aid owners opinion</td>
<td>67%</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>68%</td>
<td></td>
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<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>69%</td>
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<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>70%</td>
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<tr>
<td>Have hearing loss in only one ear</td>
<td>70%</td>
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<td></td>
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<tr>
<td>Have not had hearing tested yet</td>
<td>70%</td>
<td></td>
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<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>71%</td>
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<tr>
<td>Bad design</td>
<td>71%</td>
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<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>71%</td>
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<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>78%</td>
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<tr>
<td>I have vision or dexterity problems</td>
<td>78%</td>
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<tr>
<td>Had surgery - hearing aids wont help</td>
<td>78%</td>
<td></td>
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<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>79%</td>
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<tr>
<td>Hearing problem requires surgery</td>
<td>80%</td>
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<td></td>
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<tr>
<td>Do not trust Hearing Care Professional/Audiologist</td>
<td>85%</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Do not know where to get hearing aids</td>
<td>86%</td>
<td></td>
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</tbody>
</table>

Base: non owners Top 50% HL: n=198
Social rejection because of hearing loss compared to the acceptance of hearing aids
79% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

Hearing aid owners:
How often do you feel you are made fun of or rejected because you are wearing a hearing aid?

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

Base: n=543
Base: Top 50% hearing loss, no hearing aid n=198
Most important triggers to buy
The most important influencing factors to get a hearing aid are worsening hearing loss, doctors and significant others (+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 get a hearing aid is worsening hearing loss, followed by the ENT, spouse and audicien.

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

- Hearing loss got/gets worse: 34%
- ENT/Ear Doctor: 23%
- Spouse: 15%
- Audicien: 7%
- Child: 3%
- Friend/relative: 3%
- GP/Family doctor: 3%
- Another hearing aid owner (word of mouth): 2%
- Price of hearing aid: 2%
- Free due to coverage by Insurance/Received hearing aid free of charge: 2%
Demographics (1) Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th>Gender</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>7'137</td>
<td>10.3%</td>
<td>32.9%</td>
<td>48.8%</td>
<td>54.4%</td>
<td>52.9%</td>
</tr>
<tr>
<td>Female</td>
<td>7'338</td>
<td>8.5%</td>
<td>34.3%</td>
<td>51.2%</td>
<td>45.6%</td>
<td>47.1%</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>2'487</td>
<td>2.4%</td>
<td>33.3%</td>
<td>18.5%</td>
<td>4.4%</td>
<td>4.4%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1'627</td>
<td>2.4%</td>
<td>26.8%</td>
<td>12.1%</td>
<td>3.1%</td>
<td>2.3%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1'857</td>
<td>2.9%</td>
<td>31.8%</td>
<td>13.8%</td>
<td>4.1%</td>
<td>3.8%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1'898</td>
<td>5.0%</td>
<td>20.2%</td>
<td>13.7%</td>
<td>8.4%</td>
<td>4.2%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>1'892</td>
<td>9.5%</td>
<td>14.5%</td>
<td>13.1%</td>
<td>17.0%</td>
<td>5.7%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1'909</td>
<td>11.2%</td>
<td>23.3%</td>
<td>12.9%</td>
<td>18.1%</td>
<td>10.9%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1'497</td>
<td>19.0%</td>
<td>35.1%</td>
<td>9.2%</td>
<td>20.5%</td>
<td>21.9%</td>
</tr>
<tr>
<td>74+</td>
<td>1'307</td>
<td>33.1%</td>
<td>49.4%</td>
<td>6.7%</td>
<td>24.3%</td>
<td>46.9%</td>
</tr>
<tr>
<td>Type of household</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>single household</td>
<td>1'518</td>
<td>16.4%</td>
<td>38.2%</td>
<td>9.7%</td>
<td>17.1%</td>
<td>20.9%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>3'354</td>
<td>13.3%</td>
<td>37.0%</td>
<td>22.2%</td>
<td>31.2%</td>
<td>36.3%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>7'008</td>
<td>6.0%</td>
<td>27.7%</td>
<td>50.2%</td>
<td>33.9%</td>
<td>25.7%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>1'221</td>
<td>6.2%</td>
<td>22.9%</td>
<td>8.7%</td>
<td>6.5%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>170</td>
<td>37.1%</td>
<td>44.6%</td>
<td>0.8%</td>
<td>3.9%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Other</td>
<td>1'204</td>
<td>8.3%</td>
<td>32.4%</td>
<td>8.4%</td>
<td>7.4%</td>
<td>7.1%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<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><strong>Status</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The head of the household (alone or together with someone)</td>
<td>6'563</td>
<td>14.0%</td>
<td>34.4%</td>
<td>43.0%</td>
<td>67.0%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>3'336</td>
<td>9.4%</td>
<td>35.3%</td>
<td>23.0%</td>
<td>22.5%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>3'971</td>
<td>1.9%</td>
<td>16.2%</td>
<td>29.7%</td>
<td>7.1%</td>
</tr>
<tr>
<td>Other person</td>
<td>604</td>
<td>8.0%</td>
<td>33.8%</td>
<td>4.2%</td>
<td>3.5%</td>
</tr>
<tr>
<td><strong>Employment</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full time employed</td>
<td>4'943</td>
<td>6.6%</td>
<td>20.7%</td>
<td>43.7%</td>
<td>29.9%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>1'152</td>
<td>6.3%</td>
<td>18.1%</td>
<td>10.2%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>972</td>
<td>8.0%</td>
<td>20.8%</td>
<td>8.5%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>511</td>
<td>12.1%</td>
<td>30.0%</td>
<td>4.3%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>342</td>
<td>17.5%</td>
<td>29.4%</td>
<td>2.7%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>2'815</td>
<td>24.1%</td>
<td>44.1%</td>
<td>20.2%</td>
<td>44.0%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>1'125</td>
<td>2.1%</td>
<td>17.3%</td>
<td>10.4%</td>
<td>2.2%</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enseignement primaire</td>
<td>957</td>
<td>20.1%</td>
<td>43.0%</td>
<td>7.2%</td>
<td>12.7%</td>
</tr>
<tr>
<td>Enseignement secondaire general</td>
<td>1'952</td>
<td>11.2%</td>
<td>26.8%</td>
<td>16.4%</td>
<td>18.6%</td>
</tr>
<tr>
<td>Enseignement secondaire technique</td>
<td>1'712</td>
<td>12.0%</td>
<td>37.5%</td>
<td>14.3%</td>
<td>14.9%</td>
</tr>
<tr>
<td>Enseignement secondaire professionnel</td>
<td>1'640</td>
<td>11.9%</td>
<td>28.6%</td>
<td>13.7%</td>
<td>16.2%</td>
</tr>
<tr>
<td>Enseignement superieur de type court</td>
<td>3'038</td>
<td>8.7%</td>
<td>34.1%</td>
<td>26.3%</td>
<td>20.3%</td>
</tr>
<tr>
<td>Enseignement superieur de type long</td>
<td>2'100</td>
<td>8.3%</td>
<td>31.6%</td>
<td>18.2%</td>
<td>13.9%</td>
</tr>
<tr>
<td>autre</td>
<td>461</td>
<td>9.5%</td>
<td>33.5%</td>
<td>3.9%</td>
<td>3.4%</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 +-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>1'000</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>
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 panelist pools
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of \( n=14'475 \) 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: \( n=543 \) hearing aid owners and \( n=757 \) hearing impaired non-owners

<table>
<thead>
<tr>
<th></th>
<th>NORTH</th>
<th>SOUTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>No HA</td>
<td>557</td>
<td>200</td>
</tr>
<tr>
<td>HA</td>
<td>422</td>
<td>121</td>
</tr>
</tbody>
</table>
Hearing loss and hearing instrument ownership by gender/age 2017
Hearing Tests 2017

Have you ever taken a hearing test?

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

Where/how was your hearing tested?

- ENT (34%)
- Audiloog, Audicent (20%)
- Family doctor (7%)
- Online test (1%)
- Test on a smartphone App (0%)
- Other (40%, at work, school, CLB)

Base=10'744

Base= 3'472
Where/how was your hearing tested? North vs South

**NORTH**
- Ear doctor (ENT): 26%
- Centre auditif / Audioloog, Audicien: 32%
- Family doctor: 14%
- Online test, smartphone app: 1%
- Other: 27%
- DNK: 6%

**SOUTH**
- Ear doctor (ENT): 51%
- Centre auditif / Audioloog, Audicien: 23%
- Family doctor: 16%
- Online test, smartphone app: 2%
- Other: 14%
- DNK: 5%

*Base= 1'939*  
*Base= 1'501*
The route to the hearing aid
NORTH & SOUTH

NORTH

SOUTH
Depression symptoms: 2017

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

Probability of major depressive disorder

<table>
<thead>
<tr>
<th>Hearing aid</th>
<th>very high</th>
<th>medium</th>
<th>very low</th>
</tr>
</thead>
<tbody>
<tr>
<td>1%</td>
<td>45%</td>
<td>54%</td>
<td></td>
</tr>
</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>2%</td>
<td>59%</td>
<td>39%</td>
<td></td>
</tr>
</tbody>
</table>

Base: hearing aid n=398 / top 50% no hearing aid =191

*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).
Low adoption rates within mild hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profound</td>
<td>(5%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>NORTH</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SOUTH</td>
</tr>
<tr>
<td></td>
<td>3%</td>
<td>57%*</td>
</tr>
<tr>
<td></td>
<td>3%</td>
<td>59%*</td>
</tr>
<tr>
<td>Severe</td>
<td>(22%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Moderate</td>
<td>(47%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>31%</td>
<td>33%</td>
</tr>
<tr>
<td></td>
<td>15%</td>
<td>36%</td>
</tr>
<tr>
<td>Mild</td>
<td>(27%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>24%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>3%</td>
<td>9%</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

No hearing aid

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

- Yes, completely: 7%
- Yes, partly: 4%
- No: 7%
- don't know: 82%

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

- Yes: 28%
- No: 62%
- don't know: 10%

**HA-owner, n=502**

**HA-non-owners, n=805**
Are you aware of the brand of your hearing aid(s)?

- 58% Yes, I know it by heart
- 12% No, but I could find out
- 30% No, and can't find out

HA-owner, n=500