Results

EuroTrak France 2022

1. Introduction
2. Market overview
3. Analysis of hearing aid owners
4. Analysis of hearing impaired non-owners
5. Appendix
EuroTrak France 2022 is part of the EuroTrak / APACTrak studies:

EuroTrak France 2022 was designed and executed by Anovum (Zurich) on behalf EHIMA.

Sample sizes:
- Representative sample (sample 1): n=14’600 people
- Hearing impaired (sample 2):
  - HA owners: n= 673 people
  - Hearing impaired non-owners: n= 628 people
Summary

2. Market overview

- **Stated hearing loss prevalence**
  - Total: 9.7%, 18+: 11.9% (2018: 10.0%, 18+: 12.3%).
  - Hearing Tests: 30% (2018: 36%) had a hearing test in the last 5 years, most tests done by ENTs.

- **Hearing aid adoption rate (HA penetration)**
  - 45.7% of those with self declared HL (2018: 41.0%).
  - 4.4% of total population (2018: 4.1%).
  - 73% of HA owners have binaural treatment (2018: 71%).

- **The route to the hearing aid**
  - 81% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 64% got hearing aids recommended from the ENT or family doctor (drop out rate=21% / 2018: 26%).
  - 77% of the GP consultations referred to an ENT, 26% to an Audiologist. 6% recommended no action.
  - 41% of ENT consultations referred to an Audiologist, 53% recommended to get a hearing aid, 22% recommended no action (2018: 27%).

- **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.
  - Hearing aid owners are less exhausted in the evening.
Summary
3. Analysis of hearing aid owners

- Hearing aid ownership, usage and accessories
  - 59% of the currently owned HAs were bought in 2019 or later.
  - The average age of the currently owned HAs is 3.0 years.
  - The median age of hearing aids before replacement is 5 years.
  - On average, HAs are worn 8.4 hours a day.
  - RIC is the most often purchased type of HA.
  - Cochlear Implants: <1% of HA owners have a CI. 14% of the HA owners with severe/profound HL have been informed about CIIs by a medical professional.
  - 73% of the hearing impaired have heard of “100% Santé audiologie” and most of them are aware that HAs are fully reimbursed since January 2021.
  - 35% of the HA owners use a hearing aid app, 66% of those are satisfied with it.
  - 15% of the HAs are (to the knowledge of the owners) equipped with Telecoil. Main usage of Telecoil with phone, in office buildings and conference rooms.

- Importance of listening situations and satisfaction with HAs
  - 77% 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 (2018: 82%).
  - 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, conversations in large groups, watching TV with others and talking on a phone are the most important listening situations.

- Positive impact of HAs
  - Significant positive impact of HAs on different aspects: Especially Communication effectiveness, social life, ability to participate in group activities and relationship at home improve with hearing aids.
  - 96% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
  - 69% of the hearing aid owners feel more confident moving in a city since wearing hearing aids.
4. Analysis of hearing impaired non-owners

- **Reasons not to own/use HAs**
  - The main reasons for not using hearing aids are doctor’s opinions (ENT, GP), people (think) they can’t afford them, hearing aids don’t restore hearing to normal, audiologist’s opinion and they think that hearing aids are uncomfortable and do not work well in noisy situations.
  - 5% who own hearing aids don’t use them at all (0 hours); 10% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**
  - 71% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid. (only 42% say they are never made fun of because of their hearing loss).
  - The most important influencing factors for getting hearing aids are ENT, worsening hearing loss, audiologists, spouse and GPs (+price, insurance coverage for the non owners).
Detailed Results: Roadmap

1. **Introduction**
   - Organisation of EuroTrak France 2022
   - 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, lifetime of hearing aids and usage
   - Reasons for getting hearing aids sooner
   - Channels for getting hearing aids, recommendation of channel (NPS)
   - ‘100% Santé’: awareness, impact on purchase intention
   - Awareness and usage of hearing aid apps, Telecoil
   - 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 France 2022

Organisation
- Principal of the project EuroTrak France 2022 is EHIMA.
- Anovum Zurich developed the concept of EuroTrak France, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore Anovum analyzed the data and prepared the report.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire

Use of the data
- 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 France/2022/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 \( n=14'600 \) 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: \( n=673 \) hearing aid owners and \( n=628 \) hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
### Hearing loss and hearing instrument ownership by gender/age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Women: Unimpaired non-owner</th>
<th>Women: Impaired non-user</th>
<th>Women: HA owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>74+</td>
<td>0.8%</td>
<td>0.6%</td>
<td>2.5%</td>
</tr>
<tr>
<td>65-74</td>
<td>0.5%</td>
<td>0.6%</td>
<td>4.2%</td>
</tr>
<tr>
<td>55-64</td>
<td>0.3%</td>
<td>0.5%</td>
<td>5.3%</td>
</tr>
<tr>
<td>45-54</td>
<td>0.2%</td>
<td>0.5%</td>
<td>5.9%</td>
</tr>
<tr>
<td>35-44</td>
<td>0.2%</td>
<td>0.2%</td>
<td>5.7%</td>
</tr>
<tr>
<td>25-34</td>
<td>0.1%</td>
<td>0.1%</td>
<td>5.7%</td>
</tr>
<tr>
<td>15-24</td>
<td>0.1%</td>
<td>0.1%</td>
<td>5.9%</td>
</tr>
<tr>
<td>&lt;=14</td>
<td>1.1%</td>
<td>9.1%</td>
<td>8.7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Men: Unimpaired non-owner</th>
<th>Men: Impaired non-user</th>
<th>Men: HA owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.9%</td>
<td>0.9%</td>
<td></td>
</tr>
<tr>
<td>0.6%</td>
<td>0.4%</td>
<td></td>
</tr>
<tr>
<td>0.3%</td>
<td>0.2%</td>
<td>5.9%</td>
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<tr>
<td>0.3%</td>
<td>0.2%</td>
<td>5.9%</td>
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<tr>
<td>0.2%</td>
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<td>5.7%</td>
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<td>0.1%</td>
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<tr>
<td>0.1%</td>
<td>0.1%</td>
<td>5.9%</td>
</tr>
<tr>
<td>0.0%</td>
<td>0.1%</td>
<td>8.7%</td>
</tr>
</tbody>
</table>
Hearing loss prevalence France
Self declared hearing loss

% hearing loss prevalence

- Total
- Total 18+
- 74+
- 65-74
- 55-64
- 45-54
- 35-44
- 25-34
- 15-24
- <=14

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Hearing aid adoption rate: 46% of hearing impaired have hearing aid(s), 73% of them have binaural treatment.
Overview hearing loss prevalence and hearing aid adoption
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=628</th>
<th>HA Owner n=673</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>42%</td>
<td>21%</td>
<td>32%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>58%</td>
<td>79%</td>
<td>56%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>25%</td>
<td>9%</td>
<td>23%</td>
</tr>
<tr>
<td>Moderate</td>
<td>61%</td>
<td>54%</td>
<td>43%</td>
</tr>
<tr>
<td>Severe</td>
<td>11%</td>
<td>29%</td>
<td>70%*</td>
</tr>
<tr>
<td>Profound</td>
<td>3%</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: 30% had a hearing test in the last 5 years (2018: 36%), most tests done by ENTs

Have you ever taken a hearing test?
- Yes, in the last 12 months: 14%
- Yes, in the last 1-5 years: 16%
- Yes, more than 5 years ago: 16%
- No, never: 53%

Where/how was your hearing tested?
- Ear doctor (ENT): 53%
- Family doctor: 22%
- Audiologist: 15%
- Online test, smartphone app: 3%
- Other: 11%
- DNK: 4%

Base=12'113

Ear doctor (ENT)  Family doctor  Audiologist  Online test, smartphone app  Other  DNK

Base= 3'601
The route to the hearing aid: 
Sources of information and drop-out rates
Doctors/HCPs are the most important sources of information and therefore the major gatekeepers.

Where did you gather information about hearing aids?

- Family doctor, ear doctor (ENT), Audiologist: 42% (55% for hearing loss Total, 31% for hearing aid, 31% for hearing loss but no hearing aid)
- Internet research combined: 25% (29% for hearing loss Total, 22% for hearing aid, 22% for hearing loss but no hearing aid)
- Conversations with friends, relatives already fitted with a hearing aid: 20% (18% for hearing loss Total, 16% for hearing aid, 16% for hearing loss but no hearing aid)
- Internet research: websites of hearing aids manufacturers: 16% (15% for hearing loss Total, 11% for hearing aid, 6% for hearing loss but no hearing aid)
- Internet research: other websites, google...: 11% (9% for hearing loss Total, 11% for hearing aid, 6% for hearing loss but no hearing aid)
- Print ads received in your mailbox: 8% (7% for hearing loss Total, 8% for hearing aid, 4% for hearing loss but no hearing aid)
- Articles in magazines or newspapers: 5% (9% for hearing loss Total, 7% for hearing aid, 4% for hearing loss but no hearing aid)
- Internet research: websites of hearing aid clinics: 4% (5% for hearing loss Total, 6% for hearing aid, 3% for hearing loss but no hearing aid)
- I did not gather information about hearing aids: 12% (27% for hearing loss Total, 39% for hearing loss but no hearing aid)
- Other: 3% (4% for hearing loss Total, 3% for hearing loss but no hearing aid)
Of those who discussed the hearing loss with a doctor, around half of them 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: 81%
  - Positive medical advice (ear doctor or family doctor recommend further action): 64%
  - Discussed hearing loss with audiologist: 51%
  - Positive advice audiologist: 47%
  - Bought hearing aid: 46%

Drop out:
- 2018: 21%
- 2018: 26%
- 2018: 29%

n=1'301
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).

n=1'301
The route to the hearing aid: GP/Family doctor
Have you discussed your hearing problem with your family doctor?

<table>
<thead>
<tr>
<th>% Discussed with GP</th>
<th>Total hearing impaired</th>
<th>HA owner</th>
<th>Impaired non-owner</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2022: 60% &amp; 61%</td>
<td>2022: 71% &amp; 75%</td>
<td>2022: 51% &amp; 51%</td>
</tr>
<tr>
<td></td>
<td>2018: 61% &amp; 60%</td>
<td>2018: 61% &amp; 71%</td>
<td>2018: 51% &amp; 51%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (n=470)**
- Referred to an ear doctor (ENT): 77%
- Referred to an Audiologist: 32%
- Recommended to get a hearing aid: 18%
- Recommended no further action: 1%

**Impaired non-owner (n=308)**
- Referred to an ear doctor (ENT): 76%
- Referred to an Audiologist: 7%
- Recommended to get a hearing aid: 18%
- Recommended no further action: 11%
The route to the hearing aid: ENT

Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

- Total hearing impaired: 72% (2022) vs 69% (2018)
- HA owner: 89% (2022) vs 89% (2018)
- Hearing impaired non-owners: 58% (2022) vs 53% (2018)

What did he/she recommend?

**HA owner (n=592)**
- Did prescribe a hearing aid: 72%
- Referred to an Audiologist: 48%
- Recommended no further action: 3%

**Impaired non-owner (n=342)**
- Did prescribe a hearing aid: 27%
- Referred to an Audiologist: 33%
- Recommended no further action: 47%
The route to the hearing aid: Audiologist
Have you ever discussed your hearing problem with an Audiologist?

% Discussed with Audiologist

- Total hearing impaired: 51% (2022), 48% (2018)
- HA owner: 85% (2022), 51% (2018)
- Hearing impaired non-owners: 22% (2022), 19% (2018)

What did he/she recommend?

- HA owner (n=570)
  - Recommended to get a hearing aid: 99%
  - Recommended not to get a hearing aid: 1%

- Impaired non-owner (n=132)
  - Recommended to get a hearing aid: 75%
  - Recommended not to get a hearing aid: 25%
Recommendations by profession

- **GP**: 77% Referred to an ear doctor (ENT), 26% Referred to an Audiologist, 13% Recommended to get a hearing aid, 6% Recommended no further action
- **ENT**: 53% Referred to an Audiologist, 41% Recommended to get a hearing aid, 22% Recommended no further action
- **Audiologist**: 93% Recommended to get a hearing aid, 7% Recommended no further action

Comparing years:
- 2018: 48% Referred to an ear doctor (ENT), 27% Recommended to get a hearing aid, 39% Recommended no further action
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities
Work competitiveness: 91% 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: 8%
- Of some use: 21%
- Of significant use: 70%

n=185
Work competitiveness: People with hearing aids recognize that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to get more salary.

Base: Hearing loss, no hearing aid n=486/ hearing aid n=490
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</th>
<th>Very high</th>
<th>Medium</th>
<th>Very low</th>
</tr>
</thead>
<tbody>
<tr>
<td>1%</td>
<td>43%</td>
<td>56%</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>1%</td>
<td>51%</td>
<td>48%</td>
<td></td>
</tr>
</tbody>
</table>

Base: hearing aid n=485 / top 50% HL, no hearing aid =143

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

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

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

Are you generally satisfied with the quality of your sleep?

<table>
<thead>
<tr>
<th>Top 50% hearing loss, no hearing aid (n=143)</th>
<th>Hearing aid (n=485)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No: 43%</td>
<td>Yes: 57%</td>
</tr>
<tr>
<td>Yes: 57%</td>
<td>No: 43%</td>
</tr>
</tbody>
</table>

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29% of all hearing impaired think that hearing loss could be linked to depression and/or sleeping disorder.

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

- Sleeping disorder: 29%
- Depression: 29%
- High blood pressure: 14%
- Poor eyesight: 13%
- Back problems: 7%
- Dementia: 7%
- Diabetes: 5%
- Hearing loss is not linked to any of those health issues: 47%
3. Analysis of hearing aid owners
Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
## Low adoption rates within mild hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profound</td>
<td>(5%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2% 4%</td>
</tr>
<tr>
<td>Severe</td>
<td>(19%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>6% 13%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(58%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>33% 25%</td>
</tr>
<tr>
<td>Mild</td>
<td>(18%)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>14% 4%</td>
</tr>
</tbody>
</table>

n=1'301
Sums can differ from 100% due to rounding
* combined “severe” and “profound” because n is too small

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59% of the currently owned HAs were acquired in 2019 or later - RIC is the most often purchased type of HA.

Age of currently owned HAs (Mean):
- 2022: 3.0 years
- 2018: 2.5 years

Type of HA
- Behind the ear hearing aid with speaker in the ear connected by a thin wire: 65.1%
- Behind the ear hearing aid with a tube and earpiece: 18.6%
- In the ear hearing aid: 12.8%
- Cochlear Implant: 0.5%
- Other: 0.8%
72% of the population in France have never heard of Cochlear Implants. 14% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.

Do you know what a cochlear implant (CI) is?

- Yes, know it well: 22%
- Yes, know it a little: 6%
- No, never heard of it: 72%

n=3'988

Have you been informed about cochlear implants by a medical professional?

- Yes: 85%
- No: 14%
- don't know: 1%

n=256 (HA owners with severe/profound HL)
Hearing aids are used for 5 years before they are being replaced. On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids.

Current HAs = first HAs?
- Yes: 34%
- No: 66%

HA owners (1st HA):
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?
- 1-3 years: 18%
- 4-6 years: 48%
- 7-10 years: 27%
- 11 years or longer: 7%

Age of HA before it has been replaced:
- 2022: 5 years (median)
- 2018: 6 years (median)

HA non owners:
How many years had passed since you became aware of your hearing loss?
- 1 year: 15%
- 2 years: 23%
- 3 years: 16%
- 4-6 years: 18%
- more than 6 years: 28%

n=412
n=574
Thinking back before you obtained your first hearing aid(s): do you think, you should have gotten them sooner?

62% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

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

- Better social life: 77%
- Better mental/emotional health: 44%
- Less fatigue in the evening: 31%
- Better performance at work: 22%
- Other opportunity: 1%

HA-owner, n=673

n=442
89% received 3rd party payment – share of fully reimbursed as well as knowledge about third party payments among non owners has increased since 2018!

**Owners**: Has your hearing aid been fully or partially paid for by a third party organization (insurance, government, etc.)?

- Yes, completely: 26%
- Yes, partly: 9%
- No: 2%
- Don’t know: 63%

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

- Yes: 47%
- No: 32%
- Don’t know: 21%

2018: 17% versus 2018: 38%
73% of the hearing impaired have heard of “100% Santé audiologie” and most of them are aware that HAs are fully reimbursed since January 2021.

A reform called ‘100% Santé’ now offers improved reimbursement for hearing aids with an out-of-pocket charge of € 0.

Have you ever heard of this reform?

- Yes: 73%
- No: 27%

What do you think the 100% Santé reform consists of?

- From January 1, 2021, hearing aids are fully reimbursed: 70%
- 30 days trial before purchase: 20%
- 4 years warranty: 16%
- Follow-up services at least twice a year: 15%
- Wide choice of efficient and ergonomic hearing aids: 13%
- Many possible functions (ex: bluetooth ...): 9%
- Other: 2%
- I don’t know: 15%

n=988 (have heard of 100% Santé)
Assumed positive effect of ‘100% Santé’ on HA purchase intention, both for current owners and non owners.

**Owners**: Will this reform encourage you to renew your hearing aids more quickly?

- Yes, for sure: 37%
- Yes, maybe: 32%
- No: 31%

**Non-owners**: Do you plan to take advantage of ‘100% Santé' and get yourself hearing aids?

- Yes, for sure: 26%
- Yes, maybe: 26%
- No: 47%

HA-owner, n=566

HA-non-owners, n=422
9 out of 10 hearing impaired think, that more advanced HAs should be reimbursed as much or even more than basic HAs (supported by 100% Santé).

Compared to basic hearing aids supported by 100% Santé, should insurance companies reimburse hearing aids with more advanced and more customizable technologies ...

Hearing impaired, n=1'301
Better communication is by far the most important reason to wear hearing aids, followed by taking care of general health and access to free HAs. The new embarrassment due to masks is least important.

What is now, in order of importance, the reason for your decision to wear hearing aids?
(RANKING: RANK 1 = most important, RANK 6 = least important)

<table>
<thead>
<tr>
<th>Reason</th>
<th>RANK 1</th>
<th>RANK 2</th>
<th>RANK 3</th>
<th>RANK 4</th>
<th>RANK 5</th>
<th>RANK 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>The need to regain easy communication with others</td>
<td>44%</td>
<td>24%</td>
<td>17%</td>
<td>8%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>The will to take care of your general health</td>
<td>19%</td>
<td>27%</td>
<td>19%</td>
<td>18%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Access to hearing care without out-of-pocket expenses</td>
<td>13%</td>
<td>16%</td>
<td>17%</td>
<td>16%</td>
<td>22%</td>
<td>16%</td>
</tr>
<tr>
<td>Pressure from the entourage</td>
<td>10%</td>
<td>14%</td>
<td>15%</td>
<td>19%</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>Prescription of treatment by a doctor</td>
<td>8%</td>
<td>14%</td>
<td>23%</td>
<td>24%</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>The new embarrassment due to masks</td>
<td>7%</td>
<td>5%</td>
<td>9%</td>
<td>15%</td>
<td>21%</td>
<td>44%</td>
</tr>
</tbody>
</table>

HA-owner, n=673
Specialized hearing aid store is by far the preferred place for obtaining hearing aids (both for owners and non owners).
Recommendation intention of the place where the hearing aid(s) have been obtained is okay, with a positive NPS score of 10.

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

NPS = PROMOTERS – DETRACTORS = 10

HA-owner, n=673
On average, HAs are worn 8.4 hours a day

How many hours a day are HA worn?

HA-worn:
2022 Mean: 8.4 hours/day
2018 Mean: 7.9 hours/day

In the drawer (0 hours):
2022: 5%
2018: 7%

HA-owner, n=673
52% of today’s hearing aid owners are aware of their hearing aid brand (brand awareness has increased since 2018).

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

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

HA-owner, n=673
35% of the HA owners use a hearing aid app, 66% of those are satisfied with it.

Have you been informed by your hearing care professional about hearing aid apps? (HA owners, n=673)

- Yes: 54%
- No: 31%
- don't know / no answer: 15%

Do you personally use apps for your hearing aids? (HA owners, n= 673)

- Yes: 35%
- No: 65%

IF APPS USED (n=223):
Overall, how satisfied with the performance of your accessory(s)?

- very dissatisfied: 5%
- dissatisfied: 6%
- somewhat dissatisfied: 13%
- neutral: 10%
- somewhat satisfied: 15%
- satisfied: 38%
- very satisfied: 13%
15% of the HAs are (to the knowledge of the owners) equipped with Telecoil. Main usage of Telecoil with phone, in office buildings and conference rooms.

Are your hearing aids equipped with Telecoil?

- Yes: 15%
- No: 39%
- don't know: 46%

HA-owner, n=673

How often do you use the telecoil to improve your hearing?

- never: 10%
- rarely: 25%
- occasionally: 39%
- often: 13%
- very often: 14%

HA-owner (equipped with Telecoil), n=90

Where do you use your telecoil to improve your hearing?

- Phone: 46%
- Office buildings: 27%
- Conference room: 23%
- Theater / auditorium: 20%
- School / university: 19%
- Airport: 17%
- Train station: 16%
- Church: 13%
- Drive thru / ticket window / bank: 9%
- Other: 6%

HA-owner (use Telecoil), n=79

How satisfied are you with the telecoil option?

- very dissatisfied: 4%
- dissatisfied: 9%
- somewhat dissatisfied: 6%
- neutral: 20%
- somewhat satisfied: 21%
- satisfied: 30%
- very satisfied: 9%

HA-owner (use Telecoil), n=79
6% of the HA owners have already used remote fitting, 34% have at least heard of it, 59% have never heard of it.

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)
Satisfaction with hearing aids and drivers
77% 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: 27%
- Hearing aids work as I expected: 50%
- Hearing aids work worse than I expected: 22%

n=673
Overall satisfaction with HA: 82% of hearing aid owners are satisfied with their hearing aid(s)

Overall satisfaction with HA: 82% of hearing aid owners are satisfied with their hearing aid(s)

Percentage satisfied:

- Total HA-Owner: 17% very dissatisfied, 19% dissatisfied, 46% somewhat dissatisfied, 19% neutral, 46% somewhat satisfied, 19% satisfied, 17% very satisfied
- HA up to 2 years old: 21% very dissatisfied, 19% dissatisfied, 48% somewhat dissatisfied, 19% neutral, 48% somewhat satisfied, 19% satisfied, 21% very satisfied
- HA older than 2 years: 16% very dissatisfied, 8% dissatisfied, 45% somewhat dissatisfied, 5% neutral, 45% somewhat satisfied, 8% satisfied, 16% very satisfied
- HA worn up to 4 hrs/day: 6% very dissatisfied, 18% dissatisfied, 21% somewhat dissatisfied, 10% neutral, 21% somewhat satisfied, 18% satisfied, 6% very satisfied
- HA worn 4-8 hrs/day: 16% very dissatisfied, 4% dissatisfied, 44% somewhat dissatisfied, 7% neutral, 44% somewhat satisfied, 4% satisfied, 16% very satisfied
- HA worn more than 8 hrs/day: 23% very dissatisfied, 15% dissatisfied, 52% somewhat dissatisfied, 5% neutral, 52% somewhat satisfied, 15% satisfied, 23% very satisfied

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## Satisfaction with current hearing aids

**Quality of service after purchase**
- Dissatisfied: 8%
- Satisfied: 87%

**Quality of service during hearing aid fitting period**
- Dissatisfied: 8%
- Satisfied: 86%

**Professionalism of audiologist**
- Dissatisfied: 9%
- Satisfied: 85%

**Quality of audiologists counseling**
- Dissatisfied: 9%
- Satisfied: 85%

**Comfort with loud sounds**
- Dissatisfied: 10%
- Satisfied: 82%

**Clearness of tone and sound**
- Dissatisfied: 15%
- Satisfied: 81%

**Natural sounding**
- Dissatisfied: 12%
- Satisfied: 81%

**Richness or fidelity of sound**
- Dissatisfied: 13%
- Satisfied: 77%

**Reliability**
- Dissatisfied: 10%
- Satisfied: 84%

**Overall fit/ Comfort**
- Dissatisfied: 9%
- Satisfied: 84%

**Visibility to others**
- Dissatisfied: 9%
- Satisfied: 83%

**Ease of changing battery**
- Dissatisfied: 9%
- Satisfied: 82%

**Managing whistling/feedback/buzzing**
- Dissatisfied: 12%
- Satisfied: 80%

**Battery life**
- Dissatisfied: 15%
- Satisfied: 78%

**Value (performance versus money spent)**
- Dissatisfied: 18%
- Satisfied: 72%

### Trend
- Audiologist: +1%
- Sound quality signal process.: +/-0%
- Product features: +7%

---

*% of satisfied HA owners compared to 2018

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Satisfaction with current hearing aids

Listening situations

- Conversation with one Person: 11% dissatisfied, 86% satisfied
- At home with family members: 10% dissatisfied, 84% satisfied
- Listening to Music: 9% dissatisfied, 83% satisfied
- Conversation in small groups: 13% dissatisfied, 82% satisfied
- On the telephone: 13% dissatisfied, 82% satisfied
- Outdoors: 11% dissatisfied, 82% satisfied
- Watching TV: 15% dissatisfied, 81% satisfied
- When talking to children: 10% dissatisfied, 81% satisfied
- When riding in a car: 10% dissatisfied, 80% satisfied
- In a store, when shopping: 12% dissatisfied, 79% satisfied
- Conversation in large groups: 15% dissatisfied, 79% satisfied
- At a movie theater: 10% dissatisfied, 76% satisfied
- In a larger lecture hall (e.g., theater, concert hall, ...): 15% dissatisfied, 76% satisfied
- Leisure activities: 13% dissatisfied, 75% satisfied
- Use in noisy situations: 19% dissatisfied, 75% satisfied
- In the workplace: 11% dissatisfied, 64% satisfied
- In school or a classroom (as an observer or student): 11% dissatisfied, 59% satisfied

Trend*

- Conversation with one Person: -3%
- At home with family members: -1%
- Listening to Music: -1%
- Conversation in small groups: +/0%
- On the telephone: +2%
- Outdoors: +2%
- Watching TV: -2%
- When talking to children: -1%
- When riding in a car: +2%
- In a store, when shopping: +1%
- Conversation in large groups: +2%
- At a movie theater: +2%
- In a larger lecture hall (e.g., theater, concert hall, ...): -1%
- Leisure activities: -1%
- Use in noisy situations: -2%
- In the workplace: +7%
- In school or a classroom (as an observer or student): -5%

*% of satisfied HA owners compared to 2018

HA-owner, n=673
Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA

<table>
<thead>
<tr>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.74 Quality of Audiologists counseling</td>
</tr>
<tr>
<td>0.72 Richness or fidelity of sound</td>
</tr>
<tr>
<td>0.69 Clearness of tone and sound</td>
</tr>
<tr>
<td>0.69 Comfort with loud sounds</td>
</tr>
<tr>
<td>0.69 Natural sounding</td>
</tr>
<tr>
<td>0.71 Reliability</td>
</tr>
<tr>
<td>0.65 Overall fit/ Comfort</td>
</tr>
<tr>
<td>0.59 Visibility to others</td>
</tr>
<tr>
<td>0.58 Value (performance versus money spent)</td>
</tr>
<tr>
<td>0.57 Managing whistling/feedback/buzzing</td>
</tr>
<tr>
<td>0.56 Ease of changing battery</td>
</tr>
<tr>
<td>0.55 Battery life</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)

- At home with family members: 57%
- In conversations with large groups: 45%
- When watching TV with others: 44%
- When talking on a phone: 42%
- In conversations with 1 person: 39%
- In conversations with small groups: 34%
- In noisy situations: 29%
- In a larger lecture hall (e.g., theater, concert hall, place...): 19%
- In the workplace: 17%
- When riding in a car: 14%
- When talking to children: 13%
- Outdoors: 13%
- In a store, when shopping: 11%
- When listening to music: 10%
- At a movie theater: 10%
- During leisure activities (e.g., exercising, taking a walk,...): 7%
- In school or a classroom (as an observer or student): 6%
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially Communication effectiveness, social life, ability to participate in group activities and relationship at home 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).

![Bar chart showing changes in various aspects.](chart.png)
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
69% 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?

- Yes: 69%
- No: 31%

n=673
Also for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids.

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

- Communication with Person: 3% a lot worse, 10% worse, 28% the same, 32% better, 26% a lot better
- Social activities together with Person: 4% a lot worse, 10% worse, 37% the same, 28% better, 21% a lot better
- Personal relationship with Person: 3% a lot worse, 7% worse, 43% the same, 28% better, 19% a lot better
- Quarrels/disputes with Person: 3% a lot worse, 9% worse, 51% the same, 22% better, 15% a lot better

Someone in HH / parent has HA, n=542
96% 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?

- 50% Regularly
- 34% Occasionally
- 12% Rarely
- 4% Never

n=673
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=673</th>
<th>HA-Non-owner Low 50% HL n=312</th>
<th>Non-owner Top 50% HL n=202</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>21%</td>
<td>47%</td>
<td>38%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>79%</td>
<td>53%</td>
<td>62%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>9%</td>
<td>31%</td>
<td>7%</td>
</tr>
<tr>
<td>Moderate</td>
<td>54%</td>
<td>64%</td>
<td>59%</td>
</tr>
<tr>
<td>Severe</td>
<td>29%</td>
<td>4%</td>
<td>26%</td>
</tr>
<tr>
<td>Profound</td>
<td>8%</td>
<td>1%</td>
<td>8%</td>
</tr>
</tbody>
</table>

More similar hearing loss structure

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

- Ear doctors opinion (ENT): 46% Reason, 25% Somewhat a reason, 29% Not a reason
- Family doctors opinion (GP): 39% Reason, 26% Somewhat a reason, 35% Not a reason
- Cannot afford a hearing aid: 47% Reason, 18% Somewhat a reason, 35% Not a reason
- They do not restore your hearing to normal: 36% Reason, 28% Somewhat a reason, 36% Not a reason
- Audiologist’s opinion: 39% Reason, 21% Somewhat a reason, 40% Not a reason
- Uncomfortable: 27% Reason, 32% Somewhat a reason, 41% Not a reason
- They do not work well in noisy situations: 30% Reason, 29% Somewhat a reason, 41% Not a reason
- Hearing loss not severe enough: 21% Reason, 30% Somewhat a reason, 49% Not a reason
- Social / Family opinion such as child, spouse, friend: 27% Reason, 24% Somewhat a reason, 49% Not a reason
- Have more serious priorities: 27% Reason, 19% Somewhat a reason, 54% Not a reason

Base: non owners Top 50% HL: n=202

- Have more serious priorities
  - 27% Reason
  - 19% Somewhat a reason
  - 54% Not a reason

- Social / Family opinion such as child, spouse, friend
  - 27% Reason
  - 24% Somewhat a reason
  - 49% Not a reason

- Hearing loss not severe enough
  - 21% Reason
  - 30% Somewhat a reason
  - 49% Not a reason

- They do not work well in noisy situations
  - 30% Reason
  - 29% Somewhat a reason
  - 41% Not a reason

- Uncomfortable
  - 27% Reason
  - 32% Somewhat a reason
  - 41% Not a reason

- They do not restore your hearing to normal
  - 36% Reason
  - 28% Somewhat a reason
  - 36% Not a reason

- Audiologist’s opinion
  - 39% Reason
  - 21% Somewhat a reason
  - 40% Not a reason

- Cannot afford a hearing aid
  - 47% Reason
  - 18% Somewhat a reason
  - 35% Not a reason

- Family doctors opinion (GP)
  - 39% Reason
  - 26% Somewhat a reason
  - 35% Not a reason

- Ear doctors opinion (ENT)
  - 46% Reason
  - 25% Somewhat a reason
  - 29% Not a reason

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Reason</th>
<th>Somewhat a reason</th>
<th>Not a reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hear well enough in most situations</td>
<td>18%</td>
<td>26%</td>
<td>56%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>27%</td>
<td>15%</td>
<td>58%</td>
</tr>
<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>24%</td>
<td>18%</td>
<td>58%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>21%</td>
<td>20%</td>
<td>59%</td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>21%</td>
<td>19%</td>
<td>60%</td>
</tr>
<tr>
<td>Bad design</td>
<td>18%</td>
<td>21%</td>
<td>60%</td>
</tr>
<tr>
<td>Another hearing aid owners opinion</td>
<td>20%</td>
<td>18%</td>
<td>62%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>22%</td>
<td>16%</td>
<td>62%</td>
</tr>
<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>19%</td>
<td>19%</td>
<td>62%</td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>23%</td>
<td>13%</td>
<td>64%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>19%</td>
<td>16%</td>
<td>64%</td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td>16%</td>
<td>19%</td>
<td>65%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>21%</td>
<td>12%</td>
<td>67%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>18%</td>
<td>12%</td>
<td>70%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>13%</td>
<td>14%</td>
<td>73%</td>
</tr>
<tr>
<td>Had surgery - hearing aids wont help</td>
<td>15%</td>
<td>8%</td>
<td>77%</td>
</tr>
<tr>
<td>Do not trust Audiologist</td>
<td>13%</td>
<td>7%</td>
<td>79%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=202
Top 10 reasons for HA owners NOT using them

- Have tried hearing aid and they do not work: 34% Reason, 41% Somewhat a reason, 26% Not a reason
- Hearing loss not severe enough: 26% Reason, 48% Somewhat a reason, 26% Not a reason
- They do not restore your hearing to normal: 44% Reason, 20% Somewhat a reason, 36% Not a reason
- Uncomfortable: 37% Reason, 26% Somewhat a reason, 37% Not a reason
- Do not admit I have a hearing loss in public: 15% Reason, 45% Somewhat a reason, 40% Not a reason
- They do not work well in noisy situations: 39% Reason, 15% Somewhat a reason, 47% Not a reason
- Hearing problem requires surgery: 36% Reason, 15% Somewhat a reason, 48% Not a reason
- Have hearing loss in only one ear: 25% Reason, 25% Somewhat a reason, 50% Not a reason
- Had surgery - hearing aids wont help: 31% Reason, 16% Somewhat a reason, 53% Not a reason
- Have tinnitus (ringing in ears): 41% Reason, 6% Somewhat a reason, 53% Not a reason

Owners who don't use, n=29 (low sample!)
Social rejection because of hearing loss compared to the acceptance of hearing aids
71% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

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

- 71% Never
- 4% Rarely
- 13% Occasionally
- 12% Regularly

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

- 42% Never
- 29% Rarely
- 26% Occasionally
- 3% Regularly

Base: Top 50% hearing loss, no hearing aid n=202

n=673
Most important triggers to buy
The most important influencing factors for getting hearing aids are ENT, worsening hearing loss, audiologists, spouse and GPs (+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 ENT, followed by worsening hearing loss, audiologist and spouse.

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

- ENT/ Ear Doctor: 24%
- Hearing loss got/gets worse: 19%
- Audiologist: 18%
- Spouse: 12%
- Price of hearing aid: 5%
- Friend / relative: 3%
- GP /Family doctor: 3%
- Free due to coverage by Insurance / Received hearing aid free of charge: 3%
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>Profiles: Categories add to 100%*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>No hearing loss</td>
<td>Hearing loss but no hearing aid</td>
</tr>
<tr>
<td>Male</td>
<td>7'153</td>
<td>10.0%</td>
<td>45.9%</td>
<td>48.8%</td>
</tr>
<tr>
<td>Female</td>
<td>7'447</td>
<td>9.4%</td>
<td>45.5%</td>
<td>51.2%</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>2'665</td>
<td>2.1%</td>
<td>64.1%</td>
<td>19.8%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1'740</td>
<td>3.4%</td>
<td>55.7%</td>
<td>12.7%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1'701</td>
<td>5.2%</td>
<td>50.7%</td>
<td>12.2%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1'740</td>
<td>5.3%</td>
<td>34.9%</td>
<td>12.5%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>1'892</td>
<td>8.9%</td>
<td>31.4%</td>
<td>13.1%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1'824</td>
<td>10.4%</td>
<td>35.4%</td>
<td>12.4%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1'639</td>
<td>18.0%</td>
<td>43.0%</td>
<td>10.2%</td>
</tr>
<tr>
<td>74+</td>
<td>1'397</td>
<td>33.0%</td>
<td>54.7%</td>
<td>7.1%</td>
</tr>
<tr>
<td>Type of household</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>single household</td>
<td>1'669</td>
<td>15.6%</td>
<td>48.6%</td>
<td>10.7%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>3'666</td>
<td>15.3%</td>
<td>46.6%</td>
<td>23.5%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>6'742</td>
<td>5.0%</td>
<td>41.4%</td>
<td>48.5%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>1'145</td>
<td>5.4%</td>
<td>37.0%</td>
<td>8.2%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>243</td>
<td>34.9%</td>
<td>60.0%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Other</td>
<td>1'135</td>
<td>9.0%</td>
<td>41.5%</td>
<td>7.8%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head of the household (alone or together with someone)</td>
<td>6’737</td>
<td>14.0%</td>
<td>46.1%</td>
<td>43.9%</td>
<td>66.4%</td>
<td>67.5%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>3’310</td>
<td>10.4%</td>
<td>49.7%</td>
<td>22.5%</td>
<td>22.5%</td>
<td>26.5%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>3’912</td>
<td>1.6%</td>
<td>36.8%</td>
<td>29.2%</td>
<td>5.3%</td>
<td>3.7%</td>
</tr>
<tr>
<td>Other person</td>
<td>641</td>
<td>9.3%</td>
<td>25.7%</td>
<td>4.4%</td>
<td>5.8%</td>
<td>2.4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Full time employed</td>
<td>5’274</td>
<td>7.1%</td>
<td>39.6%</td>
<td>47.1%</td>
<td>30.5%</td>
<td>24.4%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>707</td>
<td>7.3%</td>
<td>49.8%</td>
<td>6.3%</td>
<td>3.5%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>1’117</td>
<td>7.7%</td>
<td>36.9%</td>
<td>9.9%</td>
<td>7.2%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>319</td>
<td>14.5%</td>
<td>45.6%</td>
<td>2.6%</td>
<td>3.4%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>328</td>
<td>20.5%</td>
<td>51.8%</td>
<td>2.5%</td>
<td>4.4%</td>
<td>5.7%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>2’982</td>
<td>23.6%</td>
<td>48.4%</td>
<td>21.9%</td>
<td>48.7%</td>
<td>55.8%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>1’037</td>
<td>2.4%</td>
<td>31.5%</td>
<td>9.7%</td>
<td>2.3%</td>
<td>1.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Brevet</td>
<td>1’415</td>
<td>16.3%</td>
<td>48.6%</td>
<td>11.4%</td>
<td>15.9%</td>
<td>18.4%</td>
</tr>
<tr>
<td>CAP-BEP</td>
<td>2’535</td>
<td>14.6%</td>
<td>46.2%</td>
<td>20.8%</td>
<td>26.7%</td>
<td>28.0%</td>
</tr>
<tr>
<td>Baccalauréats</td>
<td>2’888</td>
<td>8.7%</td>
<td>40.0%</td>
<td>25.3%</td>
<td>20.2%</td>
<td>16.5%</td>
</tr>
<tr>
<td>BTS - DUT</td>
<td>1’507</td>
<td>9.3%</td>
<td>46.0%</td>
<td>13.1%</td>
<td>10.2%</td>
<td>10.6%</td>
</tr>
<tr>
<td>License (BAC+3)</td>
<td>1’295</td>
<td>9.3%</td>
<td>50.0%</td>
<td>11.3%</td>
<td>8.1%</td>
<td>9.9%</td>
</tr>
<tr>
<td>Master 1 et 2 - Diplôme d'Ingénieur</td>
<td>1’083</td>
<td>8.2%</td>
<td>49.1%</td>
<td>9.5%</td>
<td>6.1%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Doctorat</td>
<td>232</td>
<td>12.6%</td>
<td>56.4%</td>
<td>2.0%</td>
<td>1.7%</td>
<td>2.7%</td>
</tr>
<tr>
<td>other</td>
<td>809</td>
<td>15.4%</td>
<td>33.5%</td>
<td>6.6%</td>
<td>11.1%</td>
<td>6.8%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*
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>